Evergreen Water & Sewer DISTRICT 1

108 Cooperative Way
Kalispell, MT 59901
(406) 257-5861
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REQUEST FOR
STATEMENT OF QUALIFICATIONS (RFQ)

FOR

PROFESSIONAL ENGINEERING SERVICES RELATING TO:
2025 Septic Tank Replacement Project RFQ

The Flathead County Water District No. 1 – Evergreen (Evergreen or District) is requesting sealed qualifications packages from qualified firms, teams or consultants interested in providing professional engineering services to the District for development and preparation of construction drawings and specifications, bidding assistance, engineering design, and other services during design and construction of the 2025 Septic Tank Replacement Project in Evergreen, Montana.

The District invites qualified consultants to submit a qualifications package based upon the scope of work identified in **Appendix A (available on District website)** of this Request for Qualifications (RFQ). The District shall not be held responsible for any oral instructions. Changes to this RFQ will be advertised or can be found on the District's website: http://www.evergreenwaterdistrict.com/.

This document is intended to provide interested consultants with sufficient information to prepare and submit a Statement of Qualifications (RFQ) for consideration by the District. The District reserves the right to reject any or all RFQs, to waive any informality or irregularity in any RFQ received, and to be the sole judge of the merits of the respective RFQs received.

SUBMITTAL OPENING DATE AND SCHEDULE

Five (5) bound hard copies and one electronic pdf copy on a thumb drive of the RFQ must be submitted to: Flathead County Water District No. 1 - Evergreen, Attn: Jeff Walla, 108 Cooperative Drive, Kalispell, MT 59901 **no later than 3:00 pm (local time) on October 23, 2025.** Responses will be received in a sealed envelope clearly marked on the outside **"**2025 Septic Tank Replacement Project RFQ". Legibility, clarity and completeness are essential.

Late submissions will not be accepted under any circumstances, and any RFQ so received shall be returned to the consultant unopened. In addition, electronic (email) submissions will not be accepted and will be rejected upon receipt. Proposing consultants will be expected to allow adequate time for the delivery of the RFQs. Sole responsibility rests with the proposing consultant to see that their RFQ is received on time.

RFQ Available	October 1, 2025
Publication	October 1, 2025, and October 19, 2025
Deadline for Questions	October 10, 2025
Final Addenda (if needed)	October 14, 2025
RFQ (Response) Due	**October 23, 2025, at 3:00 p.m.**
District Evaluation of RFQs	November 11, 2025
Interviews (by Teams online)	Not Anticipated
Board Meeting (Resolution for Selection)	November 19, 2025

Scope and Fee Negotiations	November 20 – December 5, 2025

QUESTIONS AND CLARRIFICATION

Any questions or clarifications related to the RFQ or the Scope of Work must be provided in writing by the date and time listed in the schedule above. All questions or clarification requests shall be made by email transmission to Jeff Walla, PE at jwalla@evergreenwaterdistrict.com.

SUBMITTAL FORMAT AND RFQ CONTENT

The RFQ must be organized in accordance with this section. Brevity is appreciated by the District staff and Board Members reviewing the proposals. The RFQ may not exceed the page limits described below and font size shall be 11 point or larger. Covers, dividers, and table of contents are not included in the page count. Proposed personnel resumes shall be included in Appendix A and are not included in the page count. When using double sided printing, each side of the page is counted as one page. An RFQ exceeding the specified number of pages may be considered non-responsive, and the RFQ may not be considered.

The RFQs shall include the firm's legal name, address, telephone number and contain the following information at a minimum:

Introductory Letter
(Not to Exceed 1 page, 0 points)
If desired an introductory letter can be provided and limited to one page. The letter will not be scored.

Qualifications of the Professional Personnel Assigned to the Project
(Not to Exceed 5 pages, 35 Points)
Provide an organizational chart with chain of command of the proposed personnel to be assigned on this project. Describe their role, office location, expertise or experience, and any unique qualifications or training. Include at least one team member with State and Federal grant/loan administration experience and describe the extent of their expertise. Resumes for key staff shall be provided in Appendix A but will be scored within this section. A project team consisting of multiple firm personnel must clearly state which firm is the prime firm and describe the discrete portions of the scope each respective firm is assigned.

Project Approach and Understanding
(Not to Exceed 4 pages, 30 Points)
Describe the firm's unique understanding of the project. Detail the firm's proposed approach to performing the preliminary scope of services. Explain any particular expertise that distinguishes the firm from others and why you believe your firm is best qualified for the project. Provide any recommendations the firm may have for modifying or improving the scope of services. Identify how your team will meet budget and schedule requirements while providing the best value and project outcomes. Describe your team management approach. Provide a project schedule showing key task and activity durations, major milestones and deliverables, and critical path activities. The schedule shall be legible and provided on an 11"x17" in landscape format (included in page count). A schedule narrative should accompany the schedule describing the team's ability to meet the proposed project duration.

Previous Project Experience/Project Examples

(Not to Exceed 4 pages, 25 points)
Provide descriptions of projects delivered by the project team that address similar scope and complexity of work. Writeups should clearly demonstrate relevance to this project. Identify proposed team members involved and respective roles on provided projects. Include client name, contact person, email address, and phone number as a reference for each project. Higher value will be given to projects completed in the past 10 years and to projects completed in the Flathead Valley with proximity to the District. The District is not responsible for assuring that listed reference contact information is correct nor that the listed references respond to the District's request for a referral. Consultants are advised to verify contact information and notify potential references prior to submittal.

Present and Projected Workloads/Capability to Meet Time and Budget Requirements
(Not to Exceed 1 Page, 10 points)
Provide a discussion regarding the anticipated workload for the key staff assigned to this project including the Project Manager and Lead Engineer during the time frame that this project. Indicate the number of other projects that will be managed by the Project Manager and under and by the lead engineer during the time he or she would be assigned to this project.

Appendix A: Key Staff Resume's
(No page limit, 0 points – Points included in scoring above)
Provide 1-page resumes for the proposed personnel assigned to this project.

SELECTION PROCESS

The District has adopted a procurement policy that complies with the Montana State Procurement Act, Title 18, Chapter 4, including the procurement of architectural, engineering, and land surveying services of Montana Code Annotated (MCA) § 18-8-201 - 212. The act requires "adequate" and "reasonable" time for public notice. As such, the adoption of this policy fulfills the requirements in 2 CFR 200.319 Competition through 200.320 Methods of procurement to be followed. The Service Provider will be selected on the basis of demonstrated competence and qualifications for the type of services required and thereafter the District will negotiate the services agreement with what it deems to be the most qualified firm.

Submissions will be reviewed, evaluated, and ranked on the basis of the scoring criteria noted herein by a selection committee. The selection committee will likely consist of four District staff members and one District Board member. The District expressly reserves the right, in its sole judgment, to accept or reject any or all statements, and to waive any defects and to allow modifications and supplementation of statements that are submitted within the deadline. Firms submitting statements will be accorded fair and equal treatment with respect to opportunity for discussion and revision of proposals, and such revisions may be permitted, after submissions and prior to award for the purpose of obtaining best and final proposals.

After scoring and ranking the submissions based on the criteria herein, the selection committee will in its discretion select one or more or all engineering firms to participate in interview(s), make oral presentation(s), provide supplemental information and documentation, or make site visit(s). All arrangements and scheduling shall be coordinated by the selection committee or its agent.

At the completion of the selection process, the selection committee will make a recommendation to the District's Board of Directors for approval of the highest scoring/ranked firm and request staff authorization to proceed to enter into a contract with the highest ranked firm. Following approval (selection) by the Board, District staff will enter into scope and fee negotiations with the highest ranked firm and prepare the professional services agreement. If an appropriate agreement cannot be reached with the highest ranked firm, the second ranked firm may be invited to submit a scope and fee proposal and negotiate a contract with the District.

Publish: October 1, 2025
October 19, 2025

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EXHIBIT A

2025 Septic Tank Replacement Project RFQ

SECTION 1 – BACKGROUND AND PROJECT DESCRIPTION

The Flathead County Water District No. 1 – Evergreen (District) currently operates a water supply system and sewage collection system within the unincorporated community of Evergreen. The state-permitted boundary of the District's water supply system includes properties located in Flathead County as well as some properties that are annexed into the City of Kalispell (City). The District also owns and operates a sewage collection system that has a smaller customer base and service area. The sewer boundary ("Treatment Boundary") is permitted by the state, but is also controlled by a Sanitary Sewer Treatment Agreement ("Treatment Agreement") between the District and the City that expires in 2035. The following information better describes each of these systems.

Water System Description: The existing water system dates back to the late sixties and consists of twelve (12) groundwater wells at four well sites, four (4) pumping stations (four well sites and one booster station), two (2) storage tanks totaling 2.6 million gallons, and 334,600 lineal feet of water mains ranging from 4-inches to 14-inches in diameter. The system also includes 344 control valves and 173 hydrants. There are two pressure zones in the water system. The upper pressure zone is supplied with water from two different pumping stations (one well site and one booster station). Water is pumped on demand in this zone using proportional-integral-derivative control loops to maintain pressure in this zone. Pressure in the lower zone is controlled by the water level in the two storage tanks. The District does not currently treat its water. There are 3,151 residential customers and 417 commercial customers connected to the District's water system. Annual water usage is approximately 673 million gallons but has been as high as 740 million gallons in recent years. With assistance from an outside engineering firm, the District is currently preparing a Water Facility Plan to assess system conditions and needs for expansion. This study should be completed in late 2025.

Wastewater System Description: The wastewater system was constructed in the mid-nineties and consists of approximately 86,700 lineal feet of conventional mains; 132,200 lineal feet of small diameter lines serving septic tanks, and 56,000 lineal feet of force mains, including the force main that connects Lift Station 19 with the City of Kalispell's Advanced Wastewater Treatment Plant ("City AWWTP"). The gravity and pressure pipelines range in size from 4-inches to 21-inches in diameter. The District also owns, operates, and maintains twenty-six wastewater pumping stations ("lift stations"), approximately 1,500 septic tanks and 48 effluent pumping ("STEP") systems. There are currently 2,278 wastewater accounts, 1,875 residential and 403 commercial, connected to the wastewater collection system. The District pumps average daily wastewater flows of approximately 0.4 million gallons per day (mgd) to the City AWWTP for treatment and discharge to Ashley Creek. Peaks in the District's daily flows have been as high as 1.3 mgd from a Flathead River flood in 2022, largely due to inflow and infiltration (I&I) from aging collection infrastructure. A portion of the estimated I&I is being addressed by ongoing capital improvement projects. A preliminary engineering report for the District's existing sewer facilities was completed in 2021 and amended in 2024. See Figure 1 detailing the boundaries of the District's sewer system.

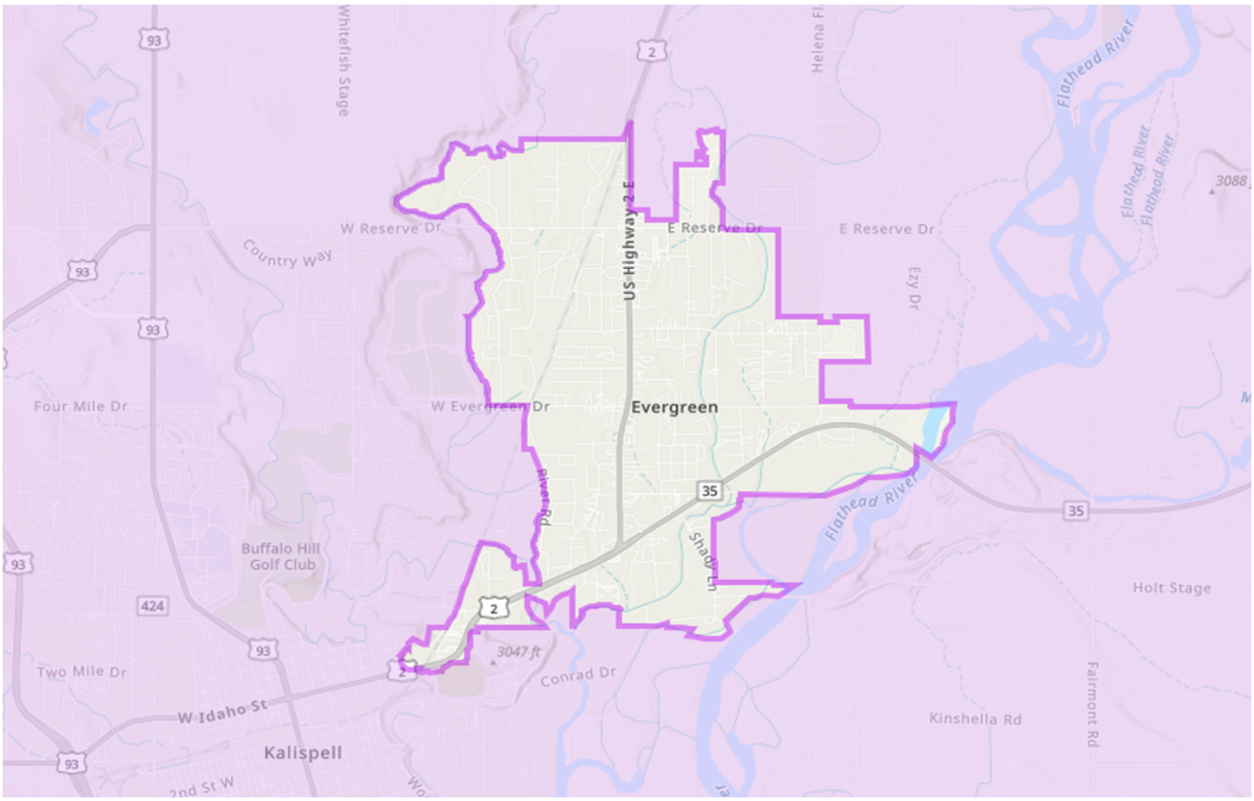

Figure 1 - Evergreen Sewer District Boundary

SECTION 2 – PROBLEM DEFINITION

The District completed a Preliminary Engineering Report in October, 2020 to assess its wastewater collection system, with particular focus on infiltration and inflow (I&I) and emergency storage. The PER concluded that a large groundwater volume seems to enter the facility between April and August and peaks between May to about July 15 each year. As a result, the District's sewer infrastructure capacity is reduced. Without ongoing maintenance to eliminate the (I&I), the District would have trouble adding additional (residential/commercial) population-based sewer connections as it may cause the effluent discharge at the City of Kalispell to exceed the 75-day moving average (floating) flow cap. As a result of this effort, the District implemented an I&I reduction program. Several I&I-focused upgrades to help reduce the groundwater inflow and infiltration (I&I) into the sewer facilities were identified in the PER, and the District has been working to address I&I in high groundwater areas within its service area boundary.

The District has identified a few key areas for septic tank replacement which are described below:

Evergreen Junior High School. Aging septic tanks at the Evergreen Junior High School have been prioritized for replacement. There are currently two 5,000-gallon septic tanks in two separate locations that will be replaced. Flow monitoring will be required to determine the proper size and configuration of the replacement tanks used for this site.

Evergreen Elementary School. Aging septic tanks at the Evergreen Elementary School have also been prioritized for replacement. The project includes replacement of two sets of septic tanks in two different

locations. Each set of tanks consists of a 2,000-gallon and 1,000-gallon tank in series Flow monitoring will be required to determine the proper size and configuration of the replacement tanks used for this site.

Shady Lane. This area in Evergreen is a low-income mobile home neighborhood with aging septic tanks located in an area with high groundwater. Twenty-six (26) septic tanks have initially been identified in this area using a smoke detection process. The tanks in this area will need to be more thoroughly inspected and prioritized for importance of replacement in an effort to fully utilize the remaining construction budget for this project.

All septic tanks and related infrastructure are owned and maintained by the Evergreen Water and Sewer District, which also holds the necessary easements for access and long-term upkeep. The existing septic tanks are connected to the Evergreen sewer collection system, which is uniquely designed to accept liquids only. Solids are retained in the septic tanks and pumped out periodically by the Evergreen Water and Sewer District. The construction process would include excavation of the existing tanks, temporary bypassing or plugging, removal of old tanks, installation of appropriate backfill, placement of the new tanks, replacement of service lines, backfilling, and returning the system to operation.

Replacement of the septic tanks at the schools is planned to take place during the school year. The work area will require safety/security fencing to ensure student safety. To avoid any disruption to school operations, the tank installation may be scheduled over a weekend. Conducting the work while school is in session provides a valuable opportunity to engage students in a hands-on learning experience.

Funding: In addition to Evergreen Water and Sewer District funds, this project will be funded via three grants, including the MDEQ Nonpoint Source and Wetlands Funding Program, the MDEQ Sewer Overflow and Stormwater Reuse Grant (OSG), and the Western Montana Conservation Commission Septic System Replacement and Sewer Connectivity Grant Program. The consultant will need to comply with the requirements of each of these grant programs, including specific invoicing and tracking requirements. The total budget for the project including all three grants and local match requirements is $533,000.00.

SECTION 3 - SCOPE OF WORK

The final Scope of Work will be established during negotiations, but key tasks and work items will include design and construction services for the replacement of a select number of aging septic tanks in the Evergreen wastewater collection system; preparation of plans, specifications, and bid documents: obtaining MT DEQ permitting approval of project plans; construction and project closeout services.

Scope of Work will be finalized during negotiations, key tasks include:

- Project management services to include typical PM requirements consisting of scope of work and agreement preparation, monthly invoicing and reporting, client and stakeholder meetings, regulatory agency coordination, and schedule preparation and tracking.
- Project scoping meeting with the District for the purpose of identifying and establishing a list of septic tanks that will be evaluated for replacement. The District will provide the consultant a list of septic tanks with locations and any available information from prior inspections that will be useful in assessing the condition of each septic tank.

- Preliminary engineering services to include, but not limited inspections of septic tanks identified during the project scoping meeting, survey and mapping, flow monitoring, and preliminary design development. Preliminary design shall result in a prioritized list of septic tanks for replacement which includes an estimated replacement cost for each septic tank and recommendation for a construction bid proposal to best utilize the funding available for this project.
- Preparation of a sampling and monitoring plan to determine project effectiveness.
- Final design services to include preparation of plans specifications, and contract documents including plan review and comments by District staff.
- Permitting approvals, including DEQ Plan review and approval, flood plain permits, right-of-way permits, and others as required.
- Bid assistance, including preparation of bid documents, holding pre-bid meeting, and keeping minutes, addenda preparation and delivery, responding to bidder questions as needed, conducting bid opening, tabulation and analysis of bids received, recommendation of award, preparation of notice of award, contract and notice to proceed. Bid solicitation will be through the QuestCDN online bidding portal.
- Construction assistance, including construction administration and observation, review of monthly Contractor pay requests, and monthly progress reports to the District.
- Implementation and documentation of sampling and monitoring plan.
- Project closeout, including required certifications and preparation of Record Drawing and Operation and Maintenance Manuals.

Additional tasks may be added to the work during negotiations or by contract amendment.

SECTION 4 – PROJECT DELIVERABLES

The project deliverables for this project include, but are not limited to:

- Scope of Work and Agreement using EJCDC boilerplate documents.
- 30% Preliminary Engineering submittal including prioritized list of septic tanks for replacement.
- Sampling and Monitoring Plan.
- 60% Plan and Specification submittal
- 95% Permit Set (Plans, Specifications, Contract Documents) Submittal.
- 100% Bid Documents and Addenda.
- For Construction Contract Documents (Plans, Specifications, Contract Documents).
- Record Drawings.

- Sampling and Monitoring Plan Effectiveness Technical Memo.
- Closeout documentation.