

REQUEST FOR QUALIFICATIONS & REQUEST FOR PROPOSALS

**GENERAL CONTRACTOR /
CONSTRUCTION MANAGER SERVICES**

LAKESIDE WATER AND SEWER DISTRICT

**WASTEWATER SBR TREATMENT FACILITY AND
COLLECTION SYSTEM CAPACITY IMPROVEMENTS**

Lakeside County Water and Sewer District
253 Bierney Creek Road
Lakeside, Montana

JANUARY 2026

I. INTRODUCTION

The Lakeside County Water and Sewer District (“District/Owner”) is seeking to obtain General Contractor / Construction Manager (“GC/CM”) services from a qualified construction firm to participate in a collaborative process with the District and Engineer to undertake pre-construction services and construction services for the Lakeside Wastewater Treatment – SBR Facility and Collection System Capacity Improvements.

The District intends to use a two-step GCCM selection process. In Step One, responses to the RFQs will be evaluated on a pass/fail basis against established minimum qualifications set forth in the RFQ. Respondents who meet all minimum qualifications will be considered prequalified and will be invited to continue and provide a response to the Request for Proposals (RFP), which will evaluate both qualifications and cost proposals for the Wastewater Treatment SBR Facility and Collection System Capacity Increase.

The RFQ deliverable shall contain all information under Section V, Part A to demonstrate compliance with the minimum qualification requirements. The RFP deliverable shall contain all items identified in Section V, Part B. Only firms that meet the minimum qualifications requirements per their RFQ deliverable will continue in the selection process. Final selection will be determined from the deliverables submitted in response to the RFQ/RFP document, interviews, and any other information sought by the Owner to assess a firm’s ability to complete the project as required. References may or may not be checked at the Owner’s sole discretion.

The Owner intends to enter a GC/CM Contract for Pre-Construction Services. This GC/CM contract will include a maximum pre-construction services fee and established GC/CM fee percentage with fixed costs for general conditions to be negotiated before construction contracts are executed. The pre-construction services contract has provisions for adding construction services through acceptance of Early Work Amendments (EWAs) and a Guaranteed Maximum Price (GMP) Amendment by contract amendment. Alternatively, the Owner may, at its sole discretion, choose not to continue the GC/CM contract beyond the completion of pre-construction activities, reserving the right to competitively bid the construction scope.

The process for the development of the design and delivery of the Project will be a collaborative process. When selected, the GC/CM will function as part of a team composed of the Owner, Engineer(s), and others as determined by the Owner.

This RFQ/RFP shall not commit the Owner to enter into any agreement, to pay any expenses incurred in preparation of any response to this request, or to procure or contract for any supplies, goods, or services. The Owner reserves the right to accept or reject any and all responses received as a result of this RFQ/RFP if it is in the Owner’s best interest to do so.

This Procurement is governed by the laws of the State of Montana and venue for all legal proceedings shall be the City of Helena, Lewis & Clark County.

By offering to perform services under this procurement, all respondents agree to be bound by the laws of the State of Montana, and Funding Agency Requirements. This includes, but is not limited

to, applicable wage rates, payments, gross receipts taxes, building codes, equal opportunity employment practices, safety, etc.

II. PROJECT BACKGROUND AND DESCRIPTION

Introduction, Project Location, Site, and Design Considerations

The existing Lakeside Wastewater Treatment Facility was constructed in the 1980s. Portions of this facility have reached the end of their useful life. Additional capacity is also needed to accommodate growth in Lakeside and Somers. Additionally, the piping and lift stations that make up the primary route to the treatment facility need to be replaced and improved to provide the capacity necessary to accommodate growth within the District.

RPA has completed a Wastewater Treatment Facility Plan which recommends construction of a Sequencing Batch Reactor (SBR) system to treat wastewater from the District and septage from Flathead County. The Phase One improvements include the Septage Receiving Facility and Headworks Building which are currently under construction. This RFQ\RFP includes construction of Phase Two Improvements at the wastewater treatment facility which are septage flow equalization tank, SBR treatment, solids storage, solids dewatering facilities, and groundwater discharge ponds. The District completed an equipment selection process whereby Aqua-Aerobics was selected to provide the sequencing batch reactor equipment and will also be advising the design team. The District is in the process of completing the contracting process for this equipment.

The main trunk line between Lakeside and treatment facility also needs to be partially replaced and improved to provide the capacity for proposed development. This RFQ/RFQ is to include replacement of gravity piping, replacement of force main piping, and approximately four sewage lift stations. Portions of the piping will be installed by pipe bursting, conventional open-dig methods, and by directional drilling. Significant amounts of this work will be within Montana Department of Transportation Right-of-Way and Flathead County Right-of-Way.

The District has engaged RPA for the project's design and are seeking a GC/CM partner to manage the complexity, schedule, and budget in the best interest of the District.

The treatment facility is being funded in part by the Montana State Revolving Program and in part through District Funds. The Collection System portions of the project are being funded privately.

It is anticipated that construction of the Wastewater Treatment Facility will be completed in phases with the first phases getting underway in 2026 and extending through 2028. Construction of the Collection System Improvements are anticipated in the summer of 2026 and extending through 2027.

The following is the intended timeline for the project:

GC/CM Selection:	Date / Time
RFQ/RFP Posted	January 18, 2026
Walk-Through	January 29, 2026, 1:30 PM
Deliverables - RFQ Due	February 3, 2026
Latest Date District to Notify Responders of Pass/Fail Response to RFQ	February 6, 2026
Final Questions Due	February 10, 2026
Deliverables - RFP Due	February 13, 2026
Review & Short-Listing by Committee	Week of February 16, 2026
Interviews (If necessary, as determined by the Owner)	February 23–24, 2026
Final Selection	No Later than February 26, 2026

Design/Construction:	Date
Completion of Schematic Design	December 2025
Completion of Design in Phases	January 2026 – March 2027
Early Procurement / Early Work – SBR Plant	Summer/Fall 2026
Completion of Construction Documents	December 2026
GMP Established	December 2026
Complete Construction	September 2028

III. SCOPE OF PRE-CONSTRUCTION SERVICES

Firms receiving this RFQ/RFP shall propose a maximum Pre-Construction services fee for the project. All Pre-Construction services will be provided on a cost-reimbursement basis up to the stated maximum. The specific scope, terms, and cost of Pre-Construction services may be negotiated prior to signing the final GC/CM pre-construction services contract, based on the proposer's input as well as the owner's requirements. The Pre-Construction Services for the SBR Wastewater Treatment Facility and Collection System Capacity Improvements will be contracted separately. In general, services are anticipated to include the following:

1. General

- Serve as a partner to the design team and District
- Provide expertise to proactively identify and manage all project risks
- Support all project management and the balancing of scope, schedule, and budget
- Add value to the project with creative ideas to improve quality, schedule, and budget

2. Quality Assurance

- Ensure a high-quality, efficiently constructable design
- Provide guidance on project design, detailing, product selections
- Complete reviews to ensure the design aligns with constructability
- Assist in investigation of existing conditions

3. Scheduling and Coordination

- Provide input on the project schedule
- Support the District's operational needs into project sequencing
- Provide input for strategic early work packages for efficient project delivery

4. Budgeting and Estimating

- Establish accurate project cost model to ensure on-budget project tracking and delivery
- Provide input for "value-engineering design" to ensure design work stays within budget
- Continuously provide input for cost saving strategies

5. Bidding Process

- Administer structured process that ensures subcontractor quality and cost effectiveness for the project

- Document the process to ensure efficient transition from pre-construction to construction for all construction amendments (EWA, GMP)

IV. SCOPE OF CONSTRUCTION SERVICES

The GMP may be requested, at the Owner's sole discretion:

- During the Construction Documents phase and prior to buy-out/bidding most or all the bid packages; or
- After completion of the Construction Documents and prior to buy-out/bidding most or all the bid packages; or,
- After bidding most or all bid packages

The established GMP (inclusive of all EWAs) will be the maximum amount paid for the construction of the project unless scope changes are requested by the District as governed by the contract documents. Acceptance of the GMP by contract amendment will constitute completion of Pre-Construction Services, and the GMP Amendment will initiate the construction period for the project where the firm will take the role as General Contractor and Construction Manager as defined in the Pre-Construction Services Conditions. It is anticipated that there will be a GMP for the SBR Wastewater Treatment Facility and a GMP for the Collection System Capacity Improvements.

At the time of execution of the GMP Amendment (inclusive of all EWAs), the GC/CM will be required to submit a 100% Performance and 100% Labor & Materials bond for the completion of the specified project. If the GC/CM is unable to furnish an acceptable GMP or bonding, the Owner retains the option to cancel the GC/CM's services and start a new process for the construction of the project, issue the project for award to the lowest responsible bidder, or terminate the contract and negotiate a replacement contract with the next highest rated proposer from this solicitation.

The project will be subject to Federal and State of Montana Prevailing Wage Rates. The selected Contractor will be required to comply with those rates adopted and effective at the time of signing any EWA and the GMP Amendment.

V. SELECTION PROCEDURE

Under this RFQ/RFP, the selection procedure is intended to evaluate the capabilities of interested GC/CM firms to provide services to the Owner for this project. Proposers must comply with the mandatory requirements provided below and proposals that do not contain the required documentation may be deemed non-responsive and may be rejected on that basis without further consideration or obligation of the Owner at the Owner's discretion.

The selection committee will establish a consensus rating of each category of each firm's submission based on the overall merit of the response. Interviews with the finalist firms may be held at the Owner's discretion. The GC/CM will be selected by the committee based on the overall merit of its RFQ response, RFP proposal response, interviews (if held), and information obtained from any other

reliable source(s). The Owner may or may not complete reference checks and other evaluations at its sole discretion. The established GMP (inclusive of all EWAs) will be the maximum amount paid for the construction of the project unless scope changes are requested by the Owner as governed by the contract documents. Acceptance of the GMP by contract amendment will constitute completion of Pre-Construction Services, and the GMP Amendment will initiate the construction period for the project where the firm will take the role as General Contractor and Construction Manager as defined in the Pre-Construction Services Conditions.

At the time of execution of the GMP Amendment (inclusive of all EWAs), the GC/CM will be required to submit a 100% Performance and 100% Labor & Materials bond for the completion of the specified project. If the GC/CM is unable to furnish an acceptable GMP or bonding, the Owner retains the option to cancel the GC/CM's services and start a new process for the construction of the project, issue the project for award to the lowest responsible bidder, or terminate the contract and negotiate a replacement contract with the next highest rated proposer from this solicitation.

The project is subject to Federal and State of Montana Prevailing Wage Rates which can be found online. The selected Contractor will be required to comply (as a minimum allowable rate schedule) with those rates adopted and effective at the time of signing any EWA and the GMP Amendment. All reporting and documentation shall comply per the State of Montana and Agency requirements.

Selection Committee:

Name	Representing / Responsibility	Selection Process Role
Marc Lehti	District Board President	Scoring Member
Rodney Olson	District General Manager	Scoring Member
Tim Kluesner	District Board Member	Scoring Member
Neal Levang	RPA	Advisor
Brad Koenig	RPA	Advisor

RFQ Deliverable

The RFQ deliverable will be reviewed on a Pass/Fail scale. Any submission that does not meet all of the minimum qualification requirements may render the submitter unqualified to continue in the process.

A. RFQ Deliverable –

Qualification Categories	Rating	Weight	Total Possible Score
1. Signature of Officer or Principal	NA	NA	PASS/FAIL
2. MT Construction Contractor Registration	NA	NA	PASS/FAIL
3. Bonding Capacity	NA	NA	PASS/FAIL
4. Legal and Financial Information	NA	NA	PASS/FAIL
5. Attendance of Pre-Submission Walk	NA	NA	PASS/FAIL

Minimum Qualification Requirements (RFQ Deliverable)

1. Signature

Statement of qualifications must be signed by an officer or principal of the firm. The requirement may be satisfied by the signature of a corporate officer or principal on a cover letter submitted WITH the RFQ/RFP response.

2. Montana Construction Contractor Registration

Provide evidence of a valid Montana Contractor Registration in good standing.

3. Bonding Capacity

It is required that the proposing firm have a single-project bonding capacity for the project of at least \$50 M.

- a. Provide single-project and aggregate bonding program amounts
- b. Provide additional bonding information:
 - i. Bonding company and agent with phone and email contact information
 - ii. Years of relationship
 - iii. If less than 5 years, or not your exclusive source, name all others used in the last 5 years and provide additional explanation about changes

4. Legal & Financial Information

Provide the firm's history of claims and financial capacity. The following may result in disqualification.

- A. In the last five years, have you (if you answer "yes," provide full explanation):
 1. Had an Owner claim against your Performance Bond?
 2. Been declared in default and/or terminated on a project?
 3. Been assessed damages for delay in delivery of project?

4. Taken legal action, filed liens, or had dispute resolution proceedings of any kind against an Owner for anything other than non-payment for accepted work?
5. *Proposer shall submit an explanation for any “yes” answer for further consideration by the Owner. The Owner reserves the sole right to waive the pass/fail requirement if, in the Owner’s sole judgment, sufficient justification exists for any explanation provided. The Owner also reserves the right to request additional information and/or clarification on this item but is not obligated to do so prior to making its determination on whether or not to waive the requirement.*

5. **Pre-Submission Walk Through**

Given the complexity of the project with facilities and the Montana Department of Transportation, it is mandatory that all firms attend the pre-submission walk through scheduled for **January 29, 2026, 1:30 PM at the District Office (253 Bierney Creek Road, Lakeside, Montana).**

- A. State the name(s) and position(s) of firm representative(s) who attended the walk through for cross referencing with the attendee roster

RFP Deliverable

Firms that pass all (5) categories in the RFQ will be deemed qualified and will receive notice that they can provide a response to the RFP. Scoring criteria for RFP responses will be rated on a scale of 0 through 10 (10 being highest rating) by the selection committee and weighted in accordance with the importance of each item. Ratings will be determined by consensus scoring of the selection committee.

B. RFP Deliverable –

Evaluation Categories	Rating	Weight	Total Possible Score
1. Approach to Preconstruction	0–10	1	10
2. Experience Managing Treatment Projects	0–10	2.5	25
3. Concrete Water Holding Structure Experience	0–10	1.5	15
4. Constrained Site Experience & MDT Coordination	0–10	1	10
5. Project Team	0–10	2	20
6. Proposed Fees and Costs	0–10	1	10

Evaluation Categories	Rating	Weight	Total Possible Score
TOTAL			90

B. Proposal Requirement (RFP Deliverable)

1. Approach to Preconstruction

How would the selection of your firm and assigned project team add value to the preconstruction process on this project? Identify any unique capabilities or strategies that make your team stand out above the competition in providing preconstruction services (as described above) on this project.

2. Experience Managing Treatment Projects

Demonstrate your assigned project team's experience successfully managing treatment plant projects where treatment has been maintained by the owner during construction. This project requires close coordination with facility operations. Also provide information on treatment and pumping equipment installed in other locations.

3. Concrete Water Holding Structure Experience

Demonstrate your assigned project team's experience constructing concrete water holding structures. This project includes the construction of numerous concrete tanks for treatment purposes and cast-in-place wet wells for lift stations.

4. Constrained Site Experience and MDT Coordination

Demonstrate your assigned project team's experience ability to work on small and constrained sites. While the treatment facility has adequate room, the collection system portions of the project require constructing buried piping and lift stations adjacent to Highway 93 and on small and constrained sites. Include any past information on projects that required MDT coordination and traffic control in MDT Right-of-Way.

5. Project Specific Team & Strategy/Approach

Provide information on the unique capability and strategy behind assigning your project-specific team to this project. Include resumes for your project manager, superintendent, and other key personnel demonstrating the relevance of their selection and their capacity to take on this project. Provide references with contact information for each team member's last three projects in a similar role. (The Owner may or may not perform reference checks at their sole discretion)

6. Proposed Fees & Costs

Provide the following information assuming a \$50M total project cost and an urgent project schedule.

1. Maximum, not-to-exceed Pre-Construction Services Fee for SBR Wastewater Treatment Facility
2. Maximum, not-to-exceed Pre-Construction Services Fee for Collection System Capacity Improvements
3. Hourly rates for personnel assigned and other/travel expenses
4. Firm's GC/CM fee percentage

VI. SUBMITTAL OF INFORMATION

Firms will first submit an RFQ deliverable. RFQ deliverables will be evaluated on a pass/fail basis. Only firms that meet the minimum qualifications requirements per their RFQ deliverable will be invited to continue in the selection process and to provide an RFP deliverable.

An electronic version in PDF format of the RFQ deliverable and, if invited to continue, an electronic version in PDF format of the RFP deliverable must be **received** at:

RPA
Attn: Brad Koenig, Project Manager
bkoenig@rpa-eng.com

and

Rodney Olson
Lakeside District Manager
rodneyolson@lcwsd.net

Any questions must be received in Email or writing by February 10, 2026 – 4:00 PM.

VII. INSTRUCTIONS TO PROPOSERS

Proposals must:

1. Follow the format outlined above
2. Contain all information requested as outlined above
3. Be contained in a clear, concise document:
 - a. RFQ Deliverable – not to exceed fifteen (15) pages/sheets total
 - b. RFP Deliverable – not to exceed forty (40) pages/sheets total
 - c. Page size is limited to 8-1/2 x 11 inches

VIII. AGREEMENT

The Owner reserves the right to negotiate all terms in the final contract, which are in the best interests of the Owner. Negotiated changes will be (1) within the general scope of work described herein, (2) unlikely to affect the field of competition under this RFQ/RFP,

and (3) unlikely to substantially affect pricing of GC/CM Fees proposed in the evaluation process.

It is the intention of the Owner to enter into a GC/CM Contract with the selected GC/CM. The initial scope of the GC/CM Contract will be limited to Pre-Construction activities only. However, the proposed GC/CM Fee submitted in this Proposal will be applied to any construction services added to the contract by early work or GMP amendment.

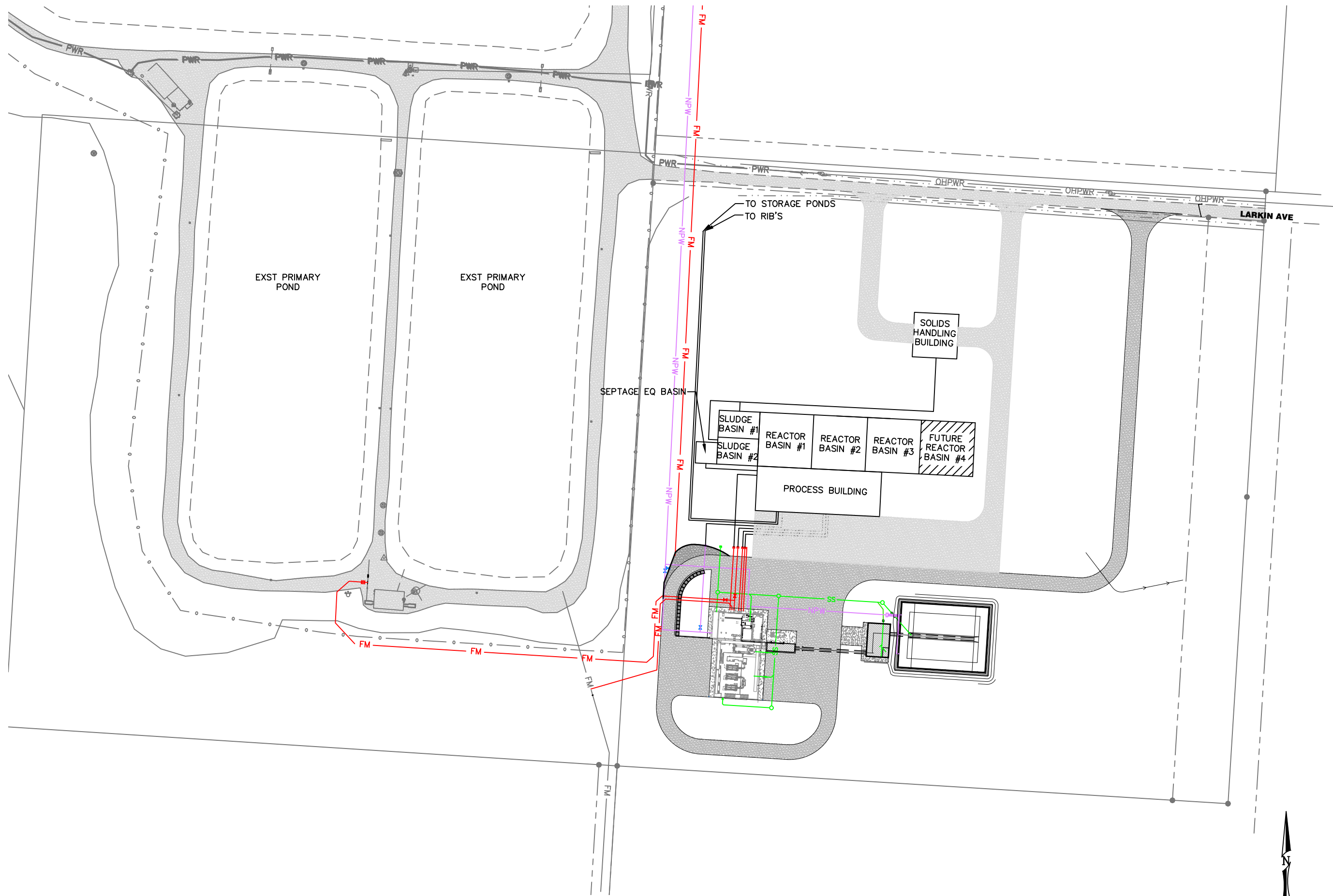
It is the Owner's right to NOT PROCEED beyond each of the design phase reviews until budget reconciliation has been achieved between the Owner, Engineer, and the GC/CM. Execution of a GMP amendment or termination of Pre-Construction services will constitute completion of Pre-Construction activities.

If construction services are added through acceptance of a GMP, an amendment to the GC/CM Contract will be executed. If the construction phase amendment is executed, a 100% Performance bond and a 100% Labor & Materials bond for the completion of the Project will be required.

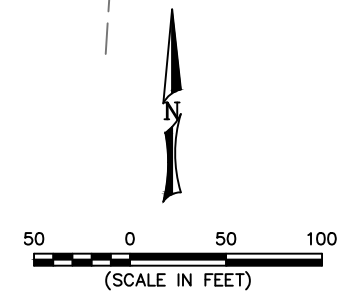
If the Owner chooses not to continue the GC/CM Contract beyond the completion of Pre-Construction activities, the GC/CM's compensation shall be limited to the Pre-Construction services maximum, not-to-exceed fee stated in the GC/CM Contract.

EXHIBITS

- A. SBR WWTP – RECOMMENDED SITE PLAN – LAKESIDE, MT**
- B. GENERAL OVERVIEW OF PROPOSED IMPROVEMENT – LAKESIDE COLLECTION SYSTEM**



SBR WWTP - RECOMMENDED SITE PLAN - LAKESIDE, MT





GENERAL OVERVIEW OF PROPOSED IMPROVEMENTS - LAKESIDE COLLECTION SYSTEM