

**REQUEST FOR QUALIFICATIONS  
FOR  
CONSULTING PROFESSIONAL SERVICES  
WATER AND SEWER IMPACT FEE AND NEXUS STUDY  
BIG SKY COUNTY WATER & SEWER DISTRICT  
BIG SKY, MONTANA  
RFQ # 2015-02**

The Big Sky County Water & Sewer District (“District”) is soliciting Requests for Qualifications (“RFQs”) from interested and qualified consulting firms to prepare an Impact Fee and Nexus Study for development impacts to the District’s public water and wastewater systems.

**PURPOSE**

The purpose of this RFQ is to obtain information about consulting firms interested in providing professional services to evaluate District charges for public water and wastewater system expansion and hookup fees; and to make recommendations in an Impact Fee and Nexus Study report. The RFQs will be used by the District to evaluate each firm that responds using the selection criteria outlined below.

**BACKGROUND**

The District provides the public water and sewer utility service for the Big Sky Resort area located in Big Sky, Montana. The resort is a very popular destination ski resort that has a large influx of people that travel here during the winter ski season. Summer tourism traffic to the resort has also grown each year. The earliest development occurred in the mid-70s and has grown to approximately 2,500 customer accounts. The area is also unincorporated and the water and sewer district is approximately 45% built-out. The

The District has a connection permitting system in place. Any construction that is connecting to the public sewer and/or water system is required to get a connection permit. The District uses a system of Single Family Equivalents (“SFEs”) to calculate the cost of the permit. Sewer connections are charged \$3,500 per SFE as a Plant Investment Charge. There is currently no impact fee charged for the water system connection part of the permit. The District has water meters on all service connections, and these meters are charged as part of the permit fees.

Operating expenses for the District are charged through water and sewer bills which are billed in arrears quarterly based on metered water volumes. The District has tiered irrigation rates in the summer, and uses winter averaging for sewer charges during the summer irrigation season. Black Mountain Utility Billing software is used for the billing and the customer database.

The District has a seven member Board of Directors and a staff that has managed and operated the water and sewer systems for 20 years. An extensive library of engineering reports and historical numerical data for both systems will be made available to the firm

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selected for the project. More information about the District is available online at: [www.bigskywatersewer.com](http://www.bigskywatersewer.com). Information about District rates, chargers and permit hookup fees can be found at [www.bigskywatersewer.com/billing.htm](http://www.bigskywatersewer.com/billing.htm)

**SCOPE OF WORK**

The Impact Fee and Nexus Study will include a written report with recommendations for impact fees for the water and wastewater systems. It shall also include an Executive Summary of those recommendations. Several meetings with the District staff and Board of Directors will also be required. Specific tasks include, but are not limited to:

1. Review existing water and sewer rates and charges for new main lines extensions, and individual connection permit fees;
2. Review existing water and sewer system assets and the depreciation accounting methods for those assets;
3. Evaluate the potential for creating sub-districts that may have different impact fees associated to accommodate growth in those areas of the District;
4. Prepare an Impact Fee and Nexus Study report that provides the legal nexus between fee recommendations and new connections and/or development extensions. It should also document the fee study recommendations, including, but not limited to, a description of the overall methodology used, findings, supporting justification, and a comparison to other impact fees that are relevant to the area.
5. Recommend an implantation strategy to adopt specific recommendations from the study.

**RESPONSES**

Responses to this RFQ must include the following:

1. Firm's legal name, address, and telephone numbers;
2. The experience and qualifications of the staff to be assigned to the project;
3. A description of the firm's prior experience, including up to five similar projects, location, total cost, and name of a local official knowledgeable regarding the firm's performance;
4. A description of the firm's current work activities and how these would be coordinated with the CIP project, as well as the firm's anticipated availability during the term of the project; and
5. The proposed work plan and schedule of activities to be performed.

**SELECTION PROCESS**

The selection committee shall be comprised of representatives from the District Board of Directors and staff. Evaluations of the RFQs will consist of an initial evaluation to establish a shortlist based on the following criteria:

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| 1. | Overall content of the RFQ   | 25% |
| 2. | Qualifications of professional personnel to be assigned to project | 25% |
| 3. | Related experience on similar projects                             | 20% |
| 4. | Capability to meet time and project budget requirements            | 10% |
| 5. | Present and Projected workloads                                    | 10% |
| 6. | Recent and current work for the District                           | 5%  |
| 7. | Location   | 5%  |

If the shortlist includes more than one firm, the Selection Committee may request a presentation and interview from the shortlist of prospective consultants. The award will be made to the most qualified firm whose RFQ submittal and interview (if applicable) is deemed most advantageous to the District. Unsuccessful respondents will be notified as soon as possible. All firms submitting an RFQ before the deadline will be listed on the District's website on the [RFPs](#) page.

**CONTACT INFORMATION**

Questions and responses should be directed to:

Ron Edwards, District Manager  
Big Sky County Water and Sewer District No. 363  
561 Little Coyote Road  
P.O. Box 160670  
Big Sky MT 59716

All responses must be received at the District Office no later than **5:00 PM, WEDNESDAY, APRIL 8, 2015**. Please state "Request for Qualifications for the Impact Fee and Nexus Study" on the outside of the response package and email subject line. Include three (3) hard copies of the RFQ, and email it in a pdf file format to [office@wsd363.com](mailto:office@wsd363.com) with "Request for Qualifications for the Impact Fee and Nexus Study" in the message subject line of the email.

This solicitation is being offered in accordance with federal and state requirements governing the procurement of professional services. The terms and scope of the contract will be negotiated between the District and the highest ranked prospective consultant. If the District and prospective consultant fail to reach a contractual agreement, the District reserves the right to negotiate a contract with any other finalist. The District also reserves the right to reject any and all responses at its discretion.

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