

## **Town of Apple Valley**

### **Consultant Selection Toolkit**

For use with: CIB Grant #26-DWS-0207 & ORPA Contract APP-004540

This packet combines all evaluation tools in plain language for committee members. All firms who submit responsive SOQs will be interviewed.

### Cover Sheet – Firms Interviewed

Use this table to record all firms that submitted SOQs and track interview details. All firms that apply and are deemed responsive will be interviewed. Negotiations will take place with the highest-ranked firm after interviews are complete.

Firm Name	Submitted SOQ (Y/N)	Responsive (Y/N)	Interview Date	Projects (CIB / ORPA / Both)
_____	___	___	_____	_____
_____	___	___	_____	_____
_____	___	___	_____	_____
_____	___	___	_____	_____
_____	___	___	_____	_____

## 1. SOQ Evaluation Matrix – Written Submittals

Score each SOQ on qualifications only. Do not include costs.

Category	Weight	Criteria	Score
Firm Experience & Qualifications	40	Experience with IFFPs, municipal services, recreation planning.	___
Project Understanding & Approach	30	Clear approach and understanding of Apple Valley's needs.	___
Capacity & Availability	20	Availability of key staff; ability to finish within grant periods.	___
References & Past Performance	10	Strong references and record of success.	___

## 2. Interview Scoring Sheet (Individual)

All responsive firms will be interviewed. Fill in this form for each firm.

Firm Information (to be completed by hand):

Firm Name: \_\_\_\_\_

Primary Contact: \_\_\_\_\_

Phone/Email: \_\_\_\_\_

Interview Date & Time: \_\_\_\_\_

Project(s): ☐ CIB ☐ ORPA ☐ Both

Category	Weight	Criteria	CIB Score	ORPA Score
Firm Experience & Qualifications	25	CIB: Municipal IFFPs. ORPA: Parks & recreation plans.	___	___
Project Understanding & Approach	25	CIB: Growth/facilities. ORPA: Rec needs/service levels.	___	___
Project Team & Capacity	20	Staff availability and ability to complete in time.	___	___
Community Engagement	15	Public meetings, surveys, workshops.	___	___
Technical Tools & Deliverables	10	GIS, maps, spreadsheets, ordinances.	___	___
Overall Fit & Responsiveness	5	Suitability for Apple Valley; responsiveness in interview.	___	___

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Primary Contact: \_\_\_\_\_

Phone/Email: \_\_\_\_\_

Interview Date & Time: \_\_\_\_\_

Project(s): ☐ CIB ☐ ORPA ☐ Both

Category	Weight	Criteria	CIB Score	ORPA Score
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Project Team & Capacity	20	Staff availability and ability to complete in time.	____	____
Community Engagement	15	Public meetings, surveys, workshops.	____	____
Technical Tools & Deliverables	10	GIS, maps, spreadsheets, ordinances.	____	____
Overall Fit & Responsiveness	5	Suitability for Apple Valley; responsiveness in interview.	____	____

### 3. Interview Summary Score Sheet (Committee)

After all firms are interviewed, use this sheet to record scores and calculate averages.

Firm Information (to be completed by hand):

Firm Name: \_\_\_\_\_

Primary Contact: \_\_\_\_\_

Phone/Email: \_\_\_\_\_

Interview Date & Time: \_\_\_\_\_

Project(s): ☐ CIB ☐ ORPA ☐ Both

Firm	Committee Member	CIB Score	ORPA Score
Firm ____	Member Michael Farrar	____	____
Firm ____	Member Kevin Sair	____	____
Firm ____	Member Annie Spendlove	____	____
Firm ____	Member Scott Taylor	____	____
Firm ____	Member Richard Palmer	____	____

#### Rankings

CIB Final Ranking:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

ORPA Final Ranking:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

#### **4. Evaluation Procedure Guide**

Step 1: Distribute SOQs; make sure no costs are included.

Step 2: Each member scores SOQs individually using the matrix.

Step 3: Scores are added up and averaged. All responsive firms are selected for interview.

Step 4: Conduct interviews with each firm using the scoring sheet.

Step 5: Compile interview scores and calculate averages.

Step 6: Committee reviews results and recommends firm(s).

Step 7: Town Council approves final selection.

Step 8: Contract negotiations start with the top-ranked firm.

Step 9: Keep all forms and notes for CIB and ORPA audits.

## 5. Quick Checklist (One Page)

- ☐ Review SOQs – ensure no costs included.
- ☐ Score SOQs using the evaluation matrix.
- ☐ Return scores for compilation.
- ☐ Interview all responsive firms with scoring sheets.
- ☐ Compile interview scores and averages.
- ☐ Review rankings and recommend selection.
- ☐ Council approval of selection.
- ☐ Negotiate contract with top-ranked firm.
- ☐ Keep all evaluation records for compliance.