Engineering SOQ Evaluation Worksheet

Town of Apple Valley | SOQ-2026-01

Use one copy per Council evaluator per firm. Evaluate qualifications using the six published criteria. Do not request, review or score fees or billing rates during qualifications ranking.

Firm: _____

Evaluator: _____ Date: _____

Issued SOQ and addenda reviewed: _____

Stage: Initial SOQ / Post-interview Interview date if applicable: _____

Conflict confirmation: I have disclosed actual, potential or apparent conflicts and can evaluate impartially. Initials: _____ Recused: Yes / No

Published criterion	Max	Initial	Final	Published evaluation focus
Understanding and service approach	20	____	____	Understanding of Town needs; usable task-order and communication model; scope, schedule, risk, document-control, and quality practices.
Key personnel and team qualifications	25	____	____	Licensure, relevant expertise, defined responsibilities, availability, team continuity, and qualifications of subconsultants.
Relevant municipal and project experience	25	____	____	Success with comparable small-municipality, water, storm drainage/flood, development-review, transportation, parks, and capital assignments.
Federal grant and loan experience	15	____	____	Demonstrated experience with federally assisted A/E work, Uniform Guidance, agency coordination, environmental and domestic-preference support, reporting, records, and audits.
Capacity responsiveness and local service	10	____	____	Workload, simultaneous-task capacity, emergency response, review turnaround, meeting availability, and practical service to Apple Valley. No geographic preference or residency requirement will be applied.
References and past performance	5	____	____	Quality, timeliness, budget control, collaboration, claims history, and client satisfaction.
Qualifications total	100	____	____	Final = after interview; mark N/A for firms not interviewed.

Score zero to each maximum. Explain scores and revisions on the next page. No separate interview points.

Initial signature: _____ Date: _____

Final signature if interviewed: _____ Date: _____

Basis: SOQ Section 7. Confirm issued criteria and addenda before use.

Evaluator Notes and Interview Record

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Firm: _____ Evaluator: _____

For each criterion, identify evidence, SOQ page references, strengths and gaps. For a revised score, identify what the interview clarified and why the score changed. Strong, specific evidence earns more points; use the same standard for each firm.

Understanding and service approach Initial ____ / 20 Final ____ / 20

Evidence and reason for score or post-interview change:

_____

Key personnel and team qualifications Initial ____ / 25 Final ____ / 25

Evidence and reason for score or post-interview change:

_____

Relevant municipal and project experience Initial ____ / 25 Final ____ / 25

Evidence and reason for score or post-interview change:

_____

Federal grant and loan experience Initial ____ / 15 Final ____ / 15

Evidence and reason for score or post-interview change:

_____

Capacity responsiveness and local service Initial ____ / 10 Final ____ / 10

Evidence and reason for score or post-interview change:

_____

References and past performance Initial ____ / 5 Final ____ / 5

Evidence and reason for score or post-interview change:

_____

Questions and follow up

Submit questions through the Procurement Contact. Keep questions tied to the published criteria and do not discuss price. Attach additional dated notes or reference-check records as needed.

No change / Revised after interview Supporting records attached: Yes / No

Preserve initial scores and notes. Record authorized revisions before submitting the final recommended scores; do not overwrite the original evaluation record.

Initial Submission Review Checklist

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The Procurement Contact completes this administrative review before Council scoring. Apply the issued SOQ and addenda. This checklist creates no additional points or eligibility requirements.

Firm: _____ Reviewer: _____

Review item	Check against issued requirements	Result
Receipt	Timeliness and submission method meet the issued instructions.	Pass / Follow up / Fail
Required materials	Required SOQ organization, certifications, forms and addenda acknowledgment checked.	Pass / Follow up / Fail
Minimum qualifications	Professional qualifications, proposed key personnel and licenses checked against the SOQ.	Pass / Follow up / Fail
Price separation	Confirm the SOQ contains no prohibited fees, billing rates or other price information. Refer any inclusion to the procurement official before distribution.	Pass / Follow up / Fail
Conflicts and eligibility	Form B and procurement-preparation roles reviewed; required exclusions, conflict determinations and evaluator recusals documented.	Pass / Follow up / Fail
Exceptions and responsibility	Material scope or contract exceptions and responsibility issues reviewed; verify required licenses and exclusion status before award.	Pass / Follow up / Fail

Disposition and follow up

Proceed to qualifications scoring / Hold for authorized review / Reject with basis

Reason and authority for any clarification or rejection:

_____

_____

Reviewer signature: _____ Date: _____

Minor omissions do not automatically require rejection. A clarification must not give a firm an unfair opportunity to materially rewrite its SOQ. Prior Town work with a firm is not, by itself, a conflict; disclose relationships that could affect impartiality, as Section 7.2 provides.

Master Scores and Ranking Record

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Prepare an initial record for all eligible firms, then a final record for the interviewed firms. Initial scores determine the three interview invitations; final qualifications scores determine the negotiation order. No price points are added.

Aggregation method: _____ Authorized by/date: _____

Use the method established for this procurement. If none is specified, document a consistent method before scoring; averaging eligible evaluator totals is a practical option. Treat a recusal as a recusal, not zero. Preserve all individual sheets.

Initial scores for interview invitations

Firm	Evaluators counted	Initial score /100	Rank	Interview invited
_____	____	____	____	Yes / No
_____	____	____	____	Yes / No
_____	____	____	____	Yes / No
_____	____	____	____	Yes / No
_____	____	____	____	Yes / No

Top three invited: _____

If fewer than three qualify, attach the procurement official's written best-interest determination before continuing, as required by Section 7.4.

Final scores after interviews

Final rank	Firm	Final score /100	Supporting record
1	_____	____	Individual sheets and interview notes
2	_____	____	Individual sheets and interview notes
3	_____	____	Individual sheets and interview notes

Committee ranking date and meeting record: _____

Why the highest-ranked firm is most qualified under the published criteria:

_____

_____

Prepared by: _____ Verified by: _____

Negotiation and Authorization Record

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Complete after final qualifications ranking. Begin with the highest-ranked firm. This record carries forward the negotiation fields in the supplied worksheet and does not add price to qualifications scoring.

Rank	Firm	Negotiation status and dates
1	_____	_____
2	_____	_____
3	_____	_____

Compensation review

Firm currently in negotiations: _____

Independent estimate required: Yes / No Basis: _____

Estimate completed before receiving fee proposal when required: date _____

Fee proposal received: _____ Negotiations began: _____

Proposed compensation / hourly schedule attached: _____

Master agreement ceiling or task-order pricing structure: _____

Basis for fair and reasonable compensation and supporting analysis:

_____

_____

Negotiation outcome

Agreement reached / Negotiations ongoing / Negotiations formally terminated

Outcome date and written record: _____

If terminated, reason and next-ranked firm authorized for negotiation: _____

_____

Do not proceed to a lower-ranked firm while negotiations with the higher-ranked firm remain open. Follow Section 7.4 and applicable law on formally ending and reopening negotiations.

Approval and contract record

Council authorization date and motion reference: _____

Authorized signer: _____ Execution date: _____

Required funding-agency review or approval documented: _____

Scope, rates, insurance and required federal terms finalized: Yes / No / Pending

Procurement official signature: _____ Date: _____

Engineering Selection in Plain Language

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1 Prepare the reviewers

The Town Council serves as the evaluation committee under Section 7.2. Participating members disclose conflicts before reviewing firms; document recusals. Provide each eligible evaluator the same SOQs, addenda and instructions. The Procurement Contact handles communications.

2 Screen and independently score

The Procurement Contact checks compliance and minimum qualifications. Each Council evaluator independently grades eligible firms on the six criteria, up to 100 points, and records reasons. Keep fees and billing rates out of this stage.

3 Establish the interview shortlist

Compile initial scores under the documented aggregation method and identify the three highest-ranked eligible firms. Coordinate collective deliberations under applicable meeting requirements. If fewer than three qualify, document the Section 7.4 determination before continuing.

4 Conduct the interviews

Invite shortlisted firms with substantially equal instructions, allotted time and opportunity. Section 7.3 places interviews or presentations in a properly noticed Town Council meeting. Ask questions that clarify qualifications and the original SOQ. Do not request price or allow material proposal changes.

5 Finalize scores and rank the firms

Evaluators may revise scores based on interview clarifications using the same six criteria. Preserve the original scores and explain revisions. Complete final ranking in a properly noticed meeting, with any lawful closed deliberations handled under applicable procedures. There are no extra interview points.

6 Negotiate with the first ranked firm

After ranking, request scope and compensation from the highest-ranked firm and complete any required estimate beforehand. Negotiate fair and reasonable terms. If unsuccessful, formally end those negotiations before proceeding to the next-ranked firm. This is the negotiation order, not a price competition among all firms.

7 Authorize and execute the agreement

Obtain required Town authorization, satisfy applicable funding and contract prerequisites, and sign the agreement. The planned interview or ranking date does not guarantee that fee negotiations and contract execution will finish that day. Use task orders for individual assignments under the agreement.

Retain submissions, disclosures, individual scores, interview records, compiled rankings, the selection rationale, negotiation analysis, approvals and the executed agreement in the procurement file.