



**EVALUATION COMMITTEE INTERVIEW(S) MEETING
REQUEST FOR PROPOSALS – PROFESSIONAL LEGAL SERVICES
MINUTES**

October 17, 2025 at 8:30 AM

Council Chambers – 340 Ocean Drive

PRESENT: PEGGY WHEELER, MAYOR (*COMMITTEE MEMBER*)
JOHN CALLAGHAN, VICE MAYOR (*COMMITTEE MEMBER*)
DIANA DAVIS, VICE MAYOR PRO TEM (*COMMITTEE MEMBER*)
MARIANNE HOSTA, COUNCILMEMBER (*COMMITTEE MEMBER*)
DD HALPERN, COUNCILMEMBER (*COMMITTEE MEMBER*)

ALSO PRESENT: CAITLIN E. COPELAND-RODRIGUEZ, TOWN CLERK

AUDIENCE: (*See attached Sign-In Sheet*)

CALL TO ORDER – 8:30AM

Mayor Wheeler called the meeting to order at 8:30am. She announced that the public is allowed to attend the meeting, but participation is limited to the Evaluation Committee members and the list of firms only. She asked the Town Clerk to provide an overview of the purpose and process of this meeting.

Town Clerk Copeland-Rodriguez stated that the purpose of the Committee meeting is to interview the selected firms and conduct a final ranking utilizing a scale of 1 to 3, with 1 representing the most preferred and 3 representing the least. She informed the Committee that Weiss Serota Helfman Cole & Bierman had submitted a letter formally withdrawing from consideration. She also stated that interviews would be conducted in alphabetical order and requested that the firms remain in a separate room until they are called in.

The Committee conducted interviews with Davis & Associates, P.A., Jones Foster, and TG Law PLLC.

Meeting was recessed at 9:53am.

Meeting was reconvened at 9:57am.

Town Clerk Copeland-Rodriguez asked the committee to complete their ranking sheet.

(See attached ranking sheets and notes.)

FINAL RANKINGS AND RECOMMENDATION TO THE TOWN COUNCIL

Following the initial ranking, further discussion was conducted due to a three-way tie among the firms.

After discussion, Committee Member Davis adjusted her ranking.

Based on the final rankings following the score adjustments, TG Law PLLC received the lowest overall score, indicating they were the most favored by the Evaluation Committee.

The majority of the Committee reached a consensus to have staff initiate contract negotiations with TG Law PLLC, with the resulting agreement to be presented to the Town Council at a future meeting for award consideration.

ADJOURNMENT

The meeting was adjourned at 11:18am.

ATTEST:



Caitlin E. Copeland-Rodriguez, MMC, Town Clerk

[illegible]



Town of Juno Beach
EVALUATION COMMITTEE MEETING - INTERVIEW(S) FOR PROFESSIONAL LEGAL SERVICES
FINAL RANKING FORM
October 17, 2025

FIRM(S) (In Alphabetical Order)	Committee Members & Rankings					TOTAL SCORE
	Peggy Wheeler	John Callaghan	Diana Davis	Marianne Hosta	DD Halpern	
Davis & Associates, PA.	1	2	3	1	3	10
Jones Foster	2	3	12	2	2	10
TG Law PLLC	3	1	21	3	1	10

11
9

Completed By: 
Signature

Date: 10/17/2025

Caitlin Copeland-Rodriguez
Print Name/Title



Town of Juno Beach
EVALUATION COMMITTEE INTERVIEW(S) FOR PROFESSIONAL LEGAL SERVICES
RANKING FORM
October 17, 2025

Please rank the following firms based on the interviews. Use 1 for your top choice, 2 for your second choice, and 3 for your third choice. The firm with the lowest score will be identified as the top-ranked firm.

Firm (in alphabetical order)	Ranking	
	Rank (1, 2, or 3) (Ranking on a scale of 1 to 3, with 1 representing the most preferred and 3 the least.)	Notes
Davis & Associates, P.A.	1	
Jones Foster	2	
TG Law PLLC	3	

Completed By:

Signature

Print Name

Date:

Oct 17, 2025



Town of Juno Beach
EVALUATION COMMITTEE INTERVIEW(S) FOR PROFESSIONAL LEGAL SERVICES
RANKING FORM
October 17, 2025

Please rank the following firms based on the interviews. Use 1 for your top choice, 2 for your second choice, and 3 for your third choice. The firm with the lowest score will be identified as the top-ranked firm.

Firm (in alphabetical order)	Ranking	
	Rank (1, 2, or 3) (Ranking on a scale of 1 to 3, with 1 representing the most preferred and 3 the least.)	Notes
Davis & Associates, P.A.	2	
Jones Foster	3	
TG Law PLLC	1	

Completed By: John T. Callaghan
Signature

Date: 10/17/2025

John T. Callaghan
Print Name



Town of Juno Beach
EVALUATION COMMITTEE INTERVIEW(S) FOR PROFESSIONAL LEGAL SERVICES
RANKING FORM
October 17, 2025

Please rank the following firms based on the interviews. Use 1 for your top choice, 2 for your second choice, and 3 for your third choice. The firm with the lowest score will be identified as the top-ranked firm.

	Ranking		
Firm (in alphabetical order)	Rank (1, 2, or 3) (Ranking on a scale of 1 to 3, with 1 representing the most preferred and 3 the least.)	Notes	
Davis & Associates, P.A.	3		
Jones Foster	X 2 DD		
TG Law PLLC	2 1 DD		

Completed By: _____

Signature

Date: 10-17-2025

DIANA DAVIS

Print Name



Town of Juno Beach
EVALUATION COMMITTEE INTERVIEW(S) FOR PROFESSIONAL LEGAL SERVICES
RANKING FORM
October 17, 2025

Please rank the following firms based on the interviews. Use 1 for your top choice, 2 for your second choice, and 3 for your third choice. The firm with the lowest score will be identified as the top-ranked firm.

Firm (in alphabetical order)	Ranking	
	Rank (1, 2, or 3) (Ranking on a scale of 1 to 3, with 1 representing the most preferred and 3 the least.)	Notes
Davis & Associates, P.A.	1	
Jones Foster	2	
TG Law PLLC	3	

Completed By: Marianne Hosta
Signature
Marianne Hosta
Print Name

Date: 10/17/2025



Town of Juno Beach
EVALUATION COMMITTEE INTERVIEW(S) FOR PROFESSIONAL LEGAL SERVICES
RANKING FORM
October 17, 2025

Please rank the following firms based on the interviews. Use 1 for your top choice, 2 for your second choice, and 3 for your third choice. The firm with the lowest score will be identified as the top-ranked firm.

Firm (in alphabetical order)	Ranking		Notes
	Rank (1, 2, or 3) (Ranking on a scale of 1 to 3, with 1 representing the most preferred and 3 the least.)		
Davis & Associates, P.A.	3		- Possible conflict of interest due to Keith Davis look for Peggy Wheeler to craft vote for Mayor referendum. BAD OPTICS.
Jones Foster	1 2		- No references - poorly executed application - NO consistency in who will be our attorney - No enthusiasm for TOTB
TG Law PLLC	1		- Enthusiasm for TOTB - Fresh perspective - understanding of town needs - Personal multi experience - Boutique firm that "will make you shine." Bad opinion in the past

Completed By: DD Harper
Signature

Date: 10/17/25

DD Harper
Print Name

Thomas Baird
Brett Lashley

Jones Foster

Jupiter Gulf Stream

• Live in Juno Isle, * Weekly mtg w/ Town Manager
Town of Juno Beach - Town Attorney Interview Evaluation Sheet

Candidate Firms: Jones Foster

Date: 10-17-2025

Interviewer:

Council - Diana Davis

both report to

Counselor - two fold

I. Legal Creativity and Risk Management

(1) Legal advise (2) Being exploring w/ your choices

Town Council

I value creative legal solutions that maintain flexibility within the law. Can you share examples where you crafted innovative or 'outside-the-box' legal or procedural options that helped a Council achieve its policy goals without overstepping statutory limits?

current statute mediation

Rating (1-5):	Notes: excellent framework - Sunnysands Jupiter archeological artifacts. Alternative site plan
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preserve entire 10 acres; preserve part. Difficult

How do you communicate and calibrate legal risk so that your municipal clients can maintain operational flexibility while still protecting the Town's legal position?

balancing

Rating (1-5):	Notes:
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How do you help your clients weigh the public benefit of pursuing a particular policy direction even when there is a remote or uncertain legal risk — for example, an interpretation of a board action that might be subject to challenge?

Consider costs

Rating (1-5):	Notes: Excellent
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Callaghan Staff - TM goes through; depends on TM executive style
create a sense of place - cohesive identity driven communities

II. Land Use and Development

Please describe a time when your legal guidance helped a municipality update its land-development code to balance resident concerns, legal risk, and development pressure — particularly in a coastal or largely built-out community.

Abacoa - new city w/ in city

Rating (1-5):	Notes:
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Wheeler - who comes to meetings, given 12 meetings; advisory board meetings RFP asked
Given that Juno Beach faces constant redevelopment pressure, can you provide an example where you helped a municipality navigate complex land-use or development issues in a way that preserved local character or prevented overdevelopment?

Rating (1-5):	Notes:
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Juno Beach's Town Council sometimes experiences strong differences in opinion. How do you balance remaining a neutral legal advisor while also stepping in assertively when you hear discussion moving toward a legally questionable or procedurally risky direction — even if no one has directly

10 yrs 7 yrs

Deadlines - work with Clerk; 7 days, small matter hrs
* represent other clients - will this be a distraction?
Town Manager lead - go through manager, staff.

• Sensitive to Council feelings do not want to embarrass; subtle correction
 Give statutory reference - gentle correction
 Decorum - provide buffer verbally or otherwise
 asked for your opinion? Experienced counts, 100 mts; Talk to each Council member ahead of meeting to help Mayor get consensus

Rating (1-5): _____	Notes: _____
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Politics - Jupiter 34, Lake Park 23 yrs. (Partner 45 yrs Palm Beach)
 ability navigate politics

III. Firm Structure, Responsiveness, and Cost Control

Please clarify your pricing structure. Do you offer a retainer that covers routine services? What services would be included in that retainer, and what would be considered non-routine? For hourly billing, do you bill by the minute, tenth of an hour, or quarter-hour?

HOSTA

Rating (1-5): _____	Notes: Operate within your budget retainer; work in litigation is hourly
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Do you employ any methodologies or strategies to help municipalities manage and reduce overall legal costs while maintaining quality and responsiveness?

Rating (1-5): _____	Notes: \$15,890 mos (budget ÷ 12)
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We value the responsiveness of our current Town Attorney. Who will serve as our primary point of contact, and under what circumstances would another attorney substitute for them? How do you ensure continuity and accountability when multiple attorneys serve one municipal client?

Rating (1-5): _____	Notes: _____
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Mosta represented Town/Frenchman Creek Beach Club;
 interview process selected defense; settle
 Summary Evaluation the case.

Overall Impression:	_____
Key Strengths:	_____
Areas of Concern:	_____
Recommendation:	☐ Recommend ☐ Further Review ☐ Do Not Recommend

Halpern
 Application - list of references was left out of the submittals (in error by his admin. takes responsibility)
Halpern 50 lawyers Jones Foster.
 Brett attends meetings; Ordinance Resolutions
HOSTA - represented by Brett & myself; expertise employment, securities etc... could find yourself
 Thomas Baird - I am primary;
 monthly retainer - litigation; hourly rate

Gemma Torcivia - primary TG Law

2nd Zackery Good - Land use, Homestead - messaging under fire.

Small law firm - 5atts. (1 1/2 orlando office). Dad's firm small

HBSA

Candidate Firms:

TG Law

Date: 10-17-2025

Interviewer:

Council - Diana Davis

Collaborative S. Palm Beach, Belle Glade CRA;

I. Legal Creativity and Risk Management

Deltona - city 100,000; Ocean Breeze

I value creative legal solutions that maintain flexibility within the law. Can you share examples where you crafted innovative or 'outside-the-box' legal or procedural options that helped a Council achieve its policy goals without overstepping statutory limits?

Okach

Rating (1-5):	Notes: Olachobee decorum policy
	constitutionally sound.

Trespass Public Facility

Early learning conditions

How do you communicate and calibrate legal risk so that your municipal clients can maintain operational flexibility while still protecting the Town's legal position?

Rating (1-5):	Notes: cost estimates - good at it.
	for litigation; risk lose

insurance defense work in the past

upside if you win.

How do you help your clients weigh the public benefit of pursuing a particular policy direction even when there is a remote or uncertain legal risk — for example, an interpretation of a board action that might be subject to challenge?

gravitas -

Rating (1-5):	Notes:

II. Land Use and Development

Please describe a time when your legal guidance helped a municipality update its land-development code to balance resident concerns, legal risk, and development pressure — particularly in a coastal or largely built-out community.

Deltona residential pressure

Rating (1-5):	Notes: stormwater & flooding
	enhanced PUD reg. parks/public

benefit

Given that Juno Beach faces constant redevelopment pressure, can you provide an example where you helped a municipality navigate complex land-use or development issues in a way that preserved local character or prevented overdevelopment?

market driven factors

Rating (1-5):	Notes:

Juno Beach's Town Council sometimes experiences strong differences in opinion. How do you balance remaining a neutral legal advisor while also stepping in assertively when you hear discussion moving toward a legally questionable or procedurally risky direction — even if no one has directly

watched 6 mos meetings, life long Jupiter;

If a legal error, we would correct.

Discussion as long as legally sufficient

group engage dialogue & disagree - you can

35 yrs 20 yrs
municipal board cert
shunt.
Paul - Nicki did work JB long time ago

Halpern

incentive based regulation

law firm 2020

strong belief in home rule - FIU, unique characteristics every part of state, local govt. make local choices
client sued; gave to another law firm not rep. client in litigation

Role - story / Mayor runs meeting roberts rules
 legally sufficient: shade meeting - hold discussion until "in the shade". Will violate bargaining position
 asked for your opinion?

Rating (1-5): _____	Notes: _____
	Quasi-Judicial context - more aggressive to correct the record; would ask to correct during proceeding.

III. Firm Structure, Responsiveness, and Cost Control

Please clarify your pricing structure. Do you offer a retainer that covers routine services? What services would be included in that retainer, and what would be considered non-routine? For hourly billing, do you bill by the minute, tenth of an hour, or quarter-hour?

Rating (1-5): _____	Notes: _____

Time Frames - Litigator / Different than Ken Rubin?
 Do you employ any methodologies or strategies to help municipalities manage and reduce overall legal costs while maintaining quality and responsiveness? operational guidance

Rating (1-5): _____	Notes: _____
	"need a procedure for staff" how will it be implemented

umpire balls & strikes - we work to help more than; We value the responsiveness of our current Town Attorney. Who will serve as our primary point of contact, and under what circumstances would another attorney substitute for them? How do you ensure continuity and accountability when multiple attorneys serve one municipal client?

Rating (1-5): _____	Notes: _____

Work out items prior to the meeting w/ Council Manager & Clerk. We work for you. Upside of our firm; all in govt. CRA direct; Paul - planner

Summary Evaluation

Overall Impression:	_____
Key Strengths:	_____
Areas of Concern:	_____
Recommendation:	☐ Recommend ☐ Further Review ☐ Do Not Recommend

Halpern - balancing accuracy of info with decorum of meeting; 2 govt. are active
 Deltona 100,000 active public; Factions - spirited debates
 Okaloosa Co. sovereign citizens "weak decorum policy"
 Answer your questions in advance, some for your voters; get information
 Meet w/ elected officials prior to meeting
 legally sufficient yes - make it work for you.
 Trespass ordinance for elected officials mtg.

Kieth Davis / DAVIS Firm

Hosta You highlighted ^{your} prior legal assistance to Peggy Wheeler's ballot initiative to elect the Mayor in Juno Beach. Given the polarized environment
Town of Juno Beach - Town Attorney Interview Evaluation Sheet in our

Candidate Firms: DAVIS town, How
Date: 10-17-25 Interviewer: Constance Davis would you firm

I. Legal Creativity and Risk Management

I value creative legal solutions that maintain ^{operational} flexibility within the law. Can you share examples where you crafted innovative or 'outside-the-box' legal or procedural options that helped a Council achieve its policy goals without overstepping statutory limits?

Rating (1-5): 3 Notes: Good - Tequesta water Jupiter River Colm alignment
no re-invention needed; opened road able to update all while serving
waterlines

How do you communicate and calibrate legal risk so that your municipal clients can maintain operational flexibility while still protecting the Town's legal position?

Rating (1-5): 3 Notes: Good - either way describe as town attorney?
+/- of taking various direction.

How do you help your clients weigh the public benefit of pursuing a particular policy direction even when there is a remote or uncertain legal risk — for example, an interpretation of a board action that might be subject to challenge?

Rating (1-5): 3 Notes: Good - what does Town Manager want to accomplish? Interview council
member on their news

II. Land Use and Development

Please describe a time when your legal guidance helped a municipality update its land-development code to balance resident concerns, legal risk, and development pressure — particularly in a coastal or largely built-out community.

Rating (1-5): _____ Notes: _____

Given that Juno Beach faces constant redevelopment pressure, can you provide an example where you helped a municipality navigate complex land-use or development issues in a way that preserved local character or prevented overdevelopment?

Rating (1-5): _____ Notes: Strong - Palm Beach Shores - worked
to protect character

Juno Beach's Town Council sometimes experiences strong differences in opinion. How do you balance remaining a neutral legal advisor while also stepping in assertively when you hear discussion moving toward a legally questionable or procedurally risky direction — even if no one has directly

Given your firm's high profile representation of multiple ^{coastal} municipalities, how would you ensure Juno Beach receives individualized attention and not one-size fits all.

- Prefers sidebar w/ Mayor
- Procedural - ask Mayor to step-in
- Wheeler responsive in emergency situations

asked for your opinion?

Rating (1-5): <u>3</u>	Notes: Strong, does not want to interrupt a Council member.
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Kieth Davis - primary Counsel. Proactive.

III. Firm Structure, Responsiveness, and Cost Control

Please clarify your pricing structure. Do you offer a retainer that covers routine services? What services would be included in that retainer, and what would be considered non-routine? For hourly billing, do you bill by the minute, tenth of an hour, or quarter-hour?

Rating (1-5): _____	Notes: _____
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Do you employ any methodologies or strategies to help municipalities manage and reduce overall legal costs while maintaining quality and responsiveness?

Rating (1-5): _____	Notes: _____
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We value the responsiveness of our current Town Attorney. Who will serve as our primary point of contact, and under what circumstances would another attorney substitute for them? How do you ensure continuity and accountability when multiple attorneys serve one municipal client?

Rating (1-5): _____	Notes: _____
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Wheeler - Why your firm over other applicant
 Thomas Baird - Palm Beach Shores
 Summary Evaluation serve agencies that rep. muni. and munis.

Overall Impression:	_____
Key Strengths:	_____
Areas of Concern:	_____
Recommendation:	Recommend Further Review Do Not Recommend

Callaghan - deadlines
 contrast your style w/ Len Rubin
 • Harmony, Architectural review - outcome always definitive - understandable.
 Experience Political environment - contentions
 Town Atty - stays neutral - collegial body
 Interaction - Town Manager takes the lead.
 Copies Manager on all emails to staff
 Wheeler - Mediation, Arbitration, Litigation experience

Town of Juno Beach**Town Attorney Candidate Evaluation Reference Sheet****Evaluation Categories & Descriptive Vocabulary**

Category	Key Evaluation Vocabulary & Descriptors
1. Municipal Fluency	Knowledgeable • Procedurally fluent • Clear • Precise • Articulate • Understands F.S. Ch. 163, 166, 286, 119 • Applies Sunshine Law & public records rules correctly • Explains issues plainly • Anticipates procedural implications under Robert's Rules.
2. Legal Creativity & Risk Management	Innovative • Pragmatic • Resourceful • Strategic • Solution-oriented • Anticipatory • Balances risk and flexibility • Offers options, not ultimatums • Identifies exposure early with mitigation pathways.
3. Land Use & Development Specialty	Expert • Code-literate • Defensible • Technically adept • Understands comp plan, zoning, overlay, PUDs • Experienced with quasi-judicial process, development agreements, vested rights, Bert Harris Act.
4. Responsiveness & Council Relationship	Communicative • Proactive • Dependable • Collaborative • Transparent • Listens carefully • Provides timely, clear opinions • Speaks up when legal risk is present • Respects Council direction and governance structure.
5. Cost Control & Value	Efficient • Economical • Disciplined • Transparent • Accountable • Clear billing narratives • Uses appropriate staff levels • Prioritizes fiscal responsibility while maintaining quality.

Rating Legend (for use on Interview Score Sheet)

Score	Descriptor	Meaning / Justification
5 – Excellent	Exceptional / Exceeds expectations	Comprehensive mastery; anticipates needs; superior insight.

Score	Descriptor	Meaning / Justification
4 – Strong	Above average / Very competent	Solid command; minor areas for growth.
3 – Satisfactory	Meets expectations	Competent; adequate responses; consistent.
2 – Weak	Below average / Limited depth	Superficial or incomplete understanding; reactive.
1 – Poor	Unacceptable / Lacks capability	Fails to demonstrate required proficiency or judgment.

Comments / Observations

Category	Notes
Municipal Fluency	_____
Legal Creativity & Risk Management	_____
Land Use & Development	_____
Responsiveness & Council Relationship	_____
Cost Control & Value	_____

Evaluator: _____

Date: _____

Candidate: _____

Total Score: _____ / 25

Town Attorney Interview Questions – Standard Set

I. Legal Creativity and Risk Management

1. Creative Legal Solutions

I value creative legal solutions that maintain flexibility within the law.

Can you share examples where you crafted innovative or “outside-the-box” legal or procedural options that helped a Council achieve its policy goals without overstepping statutory limits?

2. Communicating Legal Risk Effectively

How do you communicate and calibrate legal risk so that your municipal clients can maintain operational flexibility while still protecting the Town’s legal position?

3. Balancing Risk and Public Benefit

How do you help your clients weigh the public benefit of pursuing a particular policy direction even when there is a remote or uncertain legal risk — for example, an interpretation of a board action that might be subject to challenge?

II. Land Use and Development

4. Land-Use Code Reform and Resident Concerns

Please describe a time when your legal guidance helped a municipality update its land-development code to balance resident concerns, legal risk, and development pressure — particularly in a coastal or largely built-out community.

5. Managing Development Pressure

Given that Juno Beach faces constant redevelopment pressure, can you provide an example where you helped a municipality navigate complex land-use or development issues in a way that preserved local character or prevented overdevelopment?

6. Proactive and Assertive Counsel

Juno Beach’s Town Council sometimes experiences strong differences in opinion. How do you balance remaining a neutral legal advisor while also stepping in assertively when you hear discussion moving toward a legally questionable or procedurally risky direction — even if no one has directly asked for your opinion?

III. Firm Structure, Responsiveness, and Cost Control

7. Retainer Structure and Routine Services

Please clarify your pricing structure.

- Do you offer a retainer that covers routine services?
- What services would be included in that retainer, and what would be considered non-routine?
- For hourly billing, do you bill by the minute, tenth of an hour, or quarter-hour?

8. Cost-Control Strategies

Do you employ any methodologies or strategies to help municipalities manage and reduce overall legal costs while maintaining quality and responsiveness?

9. Primary Point of Contact and Availability

We value the responsiveness of our current Town Attorney.

Who will serve as our primary point of contact, and under what circumstances would another attorney substitute for them?

How do you ensure continuity and accountability when multiple attorneys serve one municipal client?