



MONTANA DEPARTMENT OF ADMINISTRATION

Director's Office

Greg Gianforte, Governor
Misty Ann Giles, Director

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NOTICE OF INTENT TO AWARD

Solicitation Title/Event Name:

Solicitation Number:

Solicitation Close Date:

Notice of Intent to Award Posting Date:

Issuing Contracts Officer/Contact Information:

The State intends to award a contract to the apparent successful offeror(s) of the above-mentioned solicitation. The Notice of Intent to Award shall not be considered a binding commitment by the state.

In accordance with the Montana Procurement Act, the State has made available for public inspection the relevant scoring matrix/bid tab for the above-mentioned solicitation. Comments from the public regarding the proposed award must be submitted to the Contracts Officer listed above within this 7-day notice period.

APPARENT SUCCESSFUL OFFEROR(S)

UNSUCCESSFUL OFFEROR(S)

**Legal Assistance
DPHHS-RFP-2026-0682MQB
SCORE SUMMARY WORKSHEET**

Category	Possible Points	Dale & Van Horn Law	Montana Legal Services Association
Evaluated RFP Section	Point Values		
Evaluated RFP Section	Point Values		
Primary Services	Total of 1200 points		
3.1 Phone Consultation	300 points	282.00	250.00
3.2 Training and Technical Assistance	150 points	130.00	135.00
3.3 Legal Clinics	250 points	240.00	225.00
3.4 Record Keeping and Reporting	100 points	90.00	75.00
3.5 Legal Research	75 points	70.00	65.00
3.6 Coordination with Ombudsmen	75 points	72.00	73.00
3.7.1-3.7.3 Advice, resources, referrals	100 points	90.00	80.00
3.7.4 Assessment of Capacity	50 points	50.00	42.00
3.7.5 Public Education	50 points	45.00	40.00
3.8 Anticipated Outputs	50 points	48.00	35.00
		1117.00	1020.00
Company Profile and Experience	Total of 400 Points		
References	100 points	100.00	100.00
Relevant Experience	100 points	100.00	90.00
Resumes - Key Personnel	200 points	190.00	175.00
		390.00	365.00
Demonstration	Total of 1600 Points		
Interview	1600	1520.00	1400.00
		1520.00	1400.00
Cost Proposal	20% of points for a possible 800 points	800.00	800.00
		800.00	800.00
Bonus Points	Total of 200 Points		
Equal Pay for Montana Women	200	200.00	200.00
		200.00	200.00
FINAL TOTAL	4,200.00	4027	3785.0

Legal Assistance					
DPHHS-RFP-2026-0682MQB					
Individual Scoring Matrix					
The evaluator/evaluation committee will review and evaluate the offers according to the following criteria based on a total number of 1500 points. The Provision of Services, Company Profile and Experience, Resumes, Cost Proposal portions of the proposal will be evaluated based on the following Scoring Guide. References will be evaluated on a Pass/Fail basis.					
Offeror (Company) Name:					Total Points Awarded:
Dale & Van Horn Law					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values			Score	Justification
Primary Services	Total of 1200 points				
3.1 Phone Consultation	300 points	282	1	250	Demonstrated strong performance in providing phone consultation, effectively meeting established requirements and expectations.
			2	300	Demonstrated the ability to manage a high-volume contract environment while consistently providing responses within the required 24-hour turnaround time.
			3	285	Demonstrated over 20 years of experience to effectively discuss reservation representative responsibilities, consistently meeting 24 hour turnaround time expectations while providing guidance and Ombudsman support
3.2 Training and Technical Assistance	150 points	130	2	130	Provided thoughtful responses and demonstrated appreciation for experienced trainers but did not offer a specific proposal for a training topic.
			3	140	Demonstrated strong knowledge of HIPAA regulations, tribal and federal law compliance, and experience presenting at the Governor's Conference.
			1	120	Demonstrated the ability to provide training. Noted that the response did not sufficiently demonstrate going above and beyond expectations.
3.3 Legal Clinics	250 points	240	3	225	Highlighted experience with Indian wills and 6 years of legal clinic work, emphasizing the importance of using plain language.
			1	240	Demonstrated familiarity with the legal clinic structure through prior volunteer experience and reinforced their knowledge of Indian wills. They also showed a strong understanding of the Older Americans Act by referencing applicable requirements and citing relevant CFR provisions, demonstrating a thorough knowledge of the governing legal framework.
			2	240	Demonstrated a strong commitment to the legal clinic model, supported by experience coordinating logistics, building community partnerships, and performing estate planning work on a daily basis. Emphasized the importance of making legal services accessible by using plain language, including documents written at a 6th grade reading level to ensure clients fully understand what they are signing and executing.

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Offeror (Company) Name:			Total Points Awarded:		
Dale & Van Horn Law					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
3.4 Record Keeping and Reporting	100 points	90	1	75	Provided a good to fair response by explaining how current caseloads are tracked within their existing case management system. However, the response did not address how caseload tracking would be adapted to the State's system or how State cases would be identified and managed separately from their organization's existing caseload.
			2	100	Demonstrated a strong commitment to maintaining complete and accurate records by promptly scheduling attorney appointments to ensure dedicated time for each client. Showed familiarity with case management systems and task reminder tools to support effective workflow management, while emphasizing the importance of consistently meeting the 24-hour turnaround time.
			3	95	Demonstrated experience with case management systems, timekeeping policies, and confidentiality procedures, while emphasizing accurate recordkeeping and consistent adherence to the 24-hour turnaround time standard.
3.5 Legal Research	75 points	70	2	75	Demonstrated broad experience in civil law and emphasized reliance on professional expertise and current legal practice rather than artificial intelligence.
			3	70	Demonstrated relevant experience through with with MLSA, legal research, and use of LexisNexis. However, the response did not clearly articulate experience or skills that would provide value to the State beyond the candidate's current scope of practice.
			1	70	Demonstrated familiarity with industry-standard legal research tools, including LexisNexis, and adequately addressed the prompt. However, the response did not distinguish experience beyond current role expectations or articulate a unique benefit to the State.
3.6 Coordination with Ombudsmen	75 points	72	3	70	Demonstrated experience working with APS, providing remote legal support, and collaborating with partner agencies. While the response reflected relevant experience, it aligned with expectations for the role and did not identify experience that would provide a distinct benefit to the State.
			1	70	Provided a strong response by citing direct experience with eviction and discharge cases, collaboration with the local Ombudsman program, and a clear understanding of the State's purpose, legal requirements, and operational complexities. The response demonstrated experience that is highly relevant and readily transferable to the responsibilities of the contract.

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Dale & Van Horn Law					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
			2	75	Provided a strong response by demonstrating a willingness to embrace all aspects of case management, including responsibilities that others may overlook. Highlighted extensive coordination with partner agencies and a solution-focused legal services model, reflecting a collaborative approach and a commitment to achieving the best outcomes for clients through interdisciplinary partnerships.
3.7.1-3.7.3 Advice, resources, referrals	100 points	90	1	90	Provided a strong response by clearly explaining how advice, resources, and referrals are delivered to meet program metrics. Demonstrated how the firm's smaller size facilitates responsive client service and resource coordination, and identified the low likelihood of conflicts of interest as an advantage when providing services statewide and collaborating with partner organizations.
			2	100	Emphasized delivering accessible and understandable legal advice, shared best practices for providing actionable guidance, and identified a need for additional guardianship materials. Demonstrated initiative by expressing a willingness to develop resources that would enhance client services and program effectiveness.
			3	80	Provided a strong response by drawing on over 20 years of experience delivering legal advice and referrals. Demonstrated a client-centered approach by emphasizing exceptional customer service, accessible communication, the value of face to face interactions, and ensuring clients receive complete, understandable information tailored to their needs.
3.7.4 Assessment of Capacity	50 points	50	2	50	Provided a strong response by demonstrating a clear understanding of effective client screening in both office and clinic settings. Highlighted the importance of meeting privately with clients, separate from accompanying support persons when appropriate, to protect confidentiality, encourage open communication, and ensure accurate assessment of client needs.
			3	45	Demonstrated a client centered, conversational approach to serving clients in both office and clinic settings. Emphasized building rapport, communicating in an accessible manner, and creating a comfortable environment that supports effective screening and service delivery.
			1	50	same comments as above; talked above and beyond what was asking in the line of seeing people where they are, making sure support person is not an influence, small dedicated firm; have shown how they would provide program consistent attention.
			3	45	Emphasized the importance of becoming a trusted, recognizable resource within the community and meeting clients where they are. Similar comments as above.

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Offeror (Company) Name:				Total Points Awarded:	
Dale & Van Horn Law					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
3.7.5 Public Education	50 points	45	1	45	Appreciated the candidate's understanding of the State's expectations for community outreach and education, as well as the ability to present legal information in an accessible and effective manner to diverse audiences.
			2	50	Emphasized a collaborative approach. Showed a commitment to actively seeking input from service providers, remaining accessible and responsive, and using feedback to continuously improve service delivery and better meet program needs.
3.8 Anticipated Outputs	50 points	48	1	50	Showed the firm's size and dedicated approach to support timely, responsive service, including the ability to meet a 24 hour callback standard that exceeds the required response timeframe. The response reflected a strong commitment to providing the State with focused attention and high quality client service.
			2	50	Strong commitment to the program by dedicating 20 hours per week specifically to the State and planning other work around program obligations, including clinics. Appreciated the proposed use of scheduled appointment slots to support consistent service delivery and the commitment to ensuring legal advice would always be available to clients.
			3	45	Strong staffing plan by committing 20 hours per week from both the attorney and legal assistant to the State program. Viewed the use of designated appointment slots as a significant strength, offering predictable scheduling, improved coordination, and reliable access to legal services for the State and its clients.
Company Profile and Experience	Total of 400 Points				
References	100 points	100	2		Full points awarded due to inconsistency within the RFP
			3		
			1		
Relevant Experience	100 points	100	3	100	20 years of experience from both attorneys listed.
			1	100	20 years of combined experience. They have participated in clinics and have shown to have extensive knowledge on how the State's program operates.
			2	100	Demonstrated broad experience capable of addressing a wide variety of legal issues, including estate planning and elder law. Shows a depth of experience in tribal law, recognizing it as a significant strength that would enhance the delivery of legal services.

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Dale & Van Horn Law					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
Resumes - Key Personnel	200 points	190	1	200	Demonstrated significant collective experience relevant to the program. One attorney would be able to provide a greater level of dedicated support, both attorneys have strong expertise in tribal and elder law. The paralegal shows extensive experience in preparing estate planning documetns and other legal documents critical to effective program delivery.
			2	180	Similar comments as above; the paralegal only has about 4 months experience.
			3	200	Similar comments as above.
TOTAL OF TECHNICAL PROPOSAL	1600	1507			
Demonstration	Total of 1600 Points				
Interview	1600	1520	2	1540	Superior interview. The attorneys and paralegal demonstrated a strong understanding of the needs of the client population and a commitment to providing responsive, client centered services. They also showed flexibility and adaptability in tailoring their practice to meet the State's program requirements, reflecting a high level of readiness to successfully deliver the contracted services.
			3	1495	Demonstrated an understanding of the unique demands of remote service delivery and the importance of relationship building. They explained how existing partnerships and community collaborations would be leveraged to expand access to services, strengthen outreach efforts, and ensure responsive, client centered program delivery across the state.
			1	1520	They provided clear, thorough responses supported by specific examples and consistently addressed the questions asked with outlined and well defined step by step processes. The emphasis on client education including explaining both the reasoning behind recommendations and the process for implementation, demonstrated comprehensive and client centered approach to legal service delivery.
Cost Proposal	20% of points for a possible 800 points	800			
Equal Pay for Montana Women 5% Bonus Points Equal Pay for Montana Women. Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points.	200	200			
TOTAL SCORE	Total of 4000				

Legal Assistance					
DPHHS-RFP-2026-0682MQB					
Individual Scoring Matrix					
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Offeror (Company) Name:				Total Points Awarded:	
Montana Legal Services Association					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
Evaluated RFP Section	Point Values			Score	Justification
Primary Services	Total of 1200 points				
3.1 Phone Consultation	300 points	250	3	290	Provided a strong response by outlining clear communication and response expectations, including notification of extended absences and timely handling of referrals. The firm has offices in Helena, Billings, and Missoula which shows commitment to accessibility. Proactive approach to serving clients with limited English proficiency and those who are hard of hearing.
			1	250	Met all stated requirements but did not exceed expectations. They have resources for clients who are hard of hearing or have limited English proficiency, as well as the commitment to meeting Ombudsman and standard client response time requirements.
			2	250	Similar comments as above; concerns regarding consistency among staff and the potential reliance on a pro bono attorney network to address conflicts of interest; this approach could result in longer response times and delays in service delivery.
3.2 Training and Technical Assistance	150 points	135	1	120	Demonstrated the ability to provide competent training and technical assistance. However, concerns that as the State's primary civil legal provider, the breadth of services offered could stretch available resources and potentially impact capacity.
			2	150	Demonstrated a strong background in providing training and technical assistance throughout the state. Relevant experience delivering training on a variety of topics and the ability to effectively support program partners through ongoing technical assistance.
			3	135	Demonstrated a willingness to partner with the agency to provide training on elder law issues. Experience regularly presenting on these topics, reflecting relevant expertise and a collaborative approach to training and technical assistance.
3.3 Legal Clinics	250 points	225	2	200	Demonstrated experience operating legal clinics; however, the response relied primarily on existing practices and did not clearly address the State's unique clinic model or identify opportunities to enhance current service delivery. Would have liked to see more specific, innovative ideas for program improvement.
			3	250	Extensive experience operating legal clinics, supported by several years of relevant work and specific examples. Discussion of tribal jurisdiction considerations and the availability of specialty clinics. Thoughtful and well established approach to service delivery.

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Offeror (Company) Name:					Total Points Awarded:
Montana Legal Services Association					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
			1	225	Strong understanding of legal clinic operations through years of volunteer experience. They have knowledge of clinic structure, workload management, and the practical aspects of delivering legal services in a clinic setting.
3.4 Record Keeping and Reporting	100 points	75	3	95	Well established case management and tracking system including the use of LegalServer, detailed timekeeping in 1/10 hour increments, referral tracking, and an online application process. Organized approach to managing cases and monitoring service delivery.
			1	75	Adequate case management process including case tracking, reporting, and an online application system. The response did not clearly explain how these processes would integrate with the program's tracking requirements. Noted that the lack of detail regarding system integration could result in duplicative tracking and administrative inefficiencies.
			2	70	Showed established case management practices and emphasized direct client accessibility through phone based conversations. Concerns that the proposed tracking system may not integrate well with the State's program requirements, potentially resulting in duplicative tracking. the online application raised some concerns. Response did not sufficiently demonstrated accessibility and responsiveness to clients.
3.5 Legal Research	75 points	65	1	70	Good response, do legal research and use lexis nexus system, prove that they do adequate research
			2	60	Strong approach to legal research using LexisNexis and established research practices to support legal analysis.
			3	65	Gave a generic response; utilizes LexisNexis.
3.6 Coordination with Ombudsmen	75 points	73	2	75	Clear understanding of the legal scenarios presented and provided relevant, well reasoned responses. Understanding of the ombudsmen's advocacy role and the importance of providing sound legal advice to support effective client advocacy.
			3	72	Emphasized established relationships and partnerships throughout the state. Focus on explaining how the law would be interpreted and the rationale behind legal guidance.
			1	75	Experience working with Ombudsman and residents on legal matters, reflecting a high level of competence in this area. Established experience and effective collaboration in supporting ombudsman services.
			3	80	Extensive statewide network through pro bono partnerships and relationships with legal organizations as well as a focus on legal resource libraries. Noted that the response did not clearly explain how these resources would be applied in practice to directly benefit clients.

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Offeror (Company) Name:					Total Points Awarded:
Montana Legal Services Association					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
3.7.1-3.7.3 Advice, resources, referrals	100 points	80	1	75	Broad statewide legal services capacity as Montana's only statewide civil legal aid provider. Noted that potential conflicts of interest could require referrals to pro bono attorneys who are not contracted with the State, raising concerns about consistency and the ability to meet required response time expectations.
			2	100	The pro bono network would be a strength as it provides a valuable resource for referrals when clients require representation beyond legal advice. The offeror would excel in connecting clients with appropriate legal resources.
3.7.4 Assessment of Capacity	50 points	42	1	40	Met the requirements. Concerns about organizational capacity given the number of programs, funding streams, and staff managed by the offeror. While the response identified offices located throughout the state, it did not clearly demonstrate how the state's program would be prioritized within the organization's overall structure.
			2	50	Strong understanding of recognizing red flags and identifying situations where a helper may be influencing a client. Appropriate awareness of client protection and ethical considerations.
			3	42	Strong approach to assessing client understanding, ensuring consistency in decision making. Recognizing potential helper influence. Use of APS when appropriate to support client safety and well being.
3.7.5 Public Education	50 points	40	2	40	Concern that the program could become closely associated with the offeror's broader services, and that existing capacity limitations in areas where demand exceeds available resources could impact service delivery.
			3	42	Strong statewide outreach and referral network with the ability to effectively share information through established partnerships. Good response but remained focused on the requirements of this RFP and did not identify opportunities beyond the scope of work.
			1	45	Ability to meet the public education requirements through statewide outreach and educational efforts. Response was adequate but it did not exceed the requirements of the RFP.
3.8 Anticipated Outputs	50 points	35	1	40	Ability to meet the requirements. Concerns about the offeror's capacity to consistently meet program needs and that while staff are located throughout the state, the response did not clearly identify who would provide services if the work were reassigned.
			2	35	Similar comments as above.
			3	48	There are 250 referrals for each attorney and paralegal.
Company Profile and Experience	Total of 400 Points				
References	100 points	100	1		Full points awarded due to inconsistency within the RFP
			2		
			3		

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Offeror (Company) Name:					Total Points Awarded:
Montana Legal Services Association					
Category	Possible Points	Consensus Score	Evaluation Member	Points Awarded	Mandatory Justification Comments for Points Awarded
Relevant Experience	100 points	90	2	75	Relevant experience; response provided limited detail regarding the primary attorney's experience, expertise, or specific interest in the legal subject matter relevant to the program
			3	100	Extensive statewide experience a strong understanding of the program requirements. Lead attorney with 25 years of experience.
			1	100	They come with a lot of experience for the topics that are covered, can cover wide range of civil topic; 60 years of experience, staff is knowledgeable.
Resumes - Key Personnel	200 points	175	3	200	The 3 resumes of key personnel were attached.
			1	200	Key personnel has ample amount of experience for what is required.
			2	150	Noted the primary attorney's resume was general and lacked detail regarding relevant experiences. Questions of the use of an attorney in a legal assistant role.
TOTAL OF TECHNICAL PROPOSAL	1600	1385			
Demonstration	Total of 1600 Points				
Interview	1600	1400	1	1350	Demonstrated relevant experience serving a similar population and provided generally strong responses. The responses regarding the case management system and reporting capabilities lacked clarity, creating some uncertainty about program specific reporting.
			2	1400	Experience serving the target population and appeared well suited for the program. Concerns that the program would represent a small portion of the offeror's overall workload, creating uncertainty about responsiveness, flexibility, system integration, and dedicated resources.
			3	1400	Concerns that the program may not be a significant focus for the offeror and noted the response relied on general organizational practices rather than providing program specific details.
Cost Proposal	20% of points for a possible 800 points	800			
Equal Pay for Montana Women 5% Bonus Points Equal Pay for Montana Women. Offerors who agree and certify compliance to Executive Order No. 12-2016, Equal Pay for Montana Women, will receive a bonus of 5% of the total points available. Offerors who do not comply will not receive bonus points.	200	200			
TOTAL SCORE	Total of 4000				

**Legal Assistance
DPHHS-RFP-2026-0682MQB
Cost Worksheet**

Lowest overall cost receives the maximum allotted points. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. Example: Total possible points for cost are 300. Offeror A's cost is \$20,000. Offeror B's cost is \$30,000. Offeror A would receive 300 points. Offeror B would receive 200 points $(\$20,000/\$30,000) = 67\% \times 300 \text{ points} = 200$).

		Cost	
Points Available	800		
Lowest Cost	\$158,430.00		
Vendor Name	Proposed Cost	Points Earned	Notes:
Dale & Van Horn Law	\$158,430.00	800.0	
Montana Legal Services Association	\$158,430.00	800.0	

**Legal Assistance
DPHHS-RFP-2026-0682MQB
SCORING GUIDE**

In awarding points to the evaluation criteria, the evaluator/evaluation committee will consider the following guidelines:

Superior Response (95-100%): A superior response is an exceptional reply that completely and comprehensively meets all of the requirements of the RFP. In addition, the response may cover areas not originally addressed within the RFP and/or include additional information and recommendations that would prove both valuable and beneficial to the agency.

Good Response (75-94%): A good response clearly meets all the requirements of the RFP and demonstrates in an unambiguous and concise manner a thorough knowledge and understanding of the project, with no deficiencies noted.

Fair Response (60-74%): A fair response minimally meets most requirements set forth in the RFP. The offeror demonstrates some ability to comply with guidelines and requirements of the project, but knowledge of the subject matter is limited.

Failed Response (59% or less): A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated sufficient knowledge of the subject matter.

Reference for Eval Committee						
Score	50	75	100	150	250	300
Superior (95-100%)	47.5 - 50	71.3 - 75	95 - 100	142.5 - 150	237.5 - 250	285 - 300
Good (75-94%)	37.5 - 47.5	56.3 - 71.2	75 - 94.9	112.5 - 142.4	187.5 - 237.3	225 - 284.7
Fair (60-74%)	30 - 37.5	45 - 56.2	60 - 74.9	90 - 112.4	150 - 187.3	180 - 224.7
Failed (0-59%)	0 - 30	0 - 44.9	0 - 59.9	0 - 89.9	0 - 149.8	0 - 179.7

Scoring Calculator Score

SH 100.00%
 SL 95.00%
 GH 94.90%
 GL 75.00%
 FH 74.90%
 FL 60.00%
 FDH 59.90%
 FDL 0.00%

Total Points Available						
Score	200	400	800	1000	1600	4000
Superior (95-100%)	190 - 200	380 - 400	760 - 800	950 - 1000	1520 - 1600	3800 - 4000
Good (75-94%)	150 - 189.8	300 - 379.6	600 - 759.2	750 - 949	1200 - 1518.4	3000 - 3796
Fair (60-74%)	120 - 149.8	240 - 299.6	480 - 599.2	600 - 749	960 - 1198.4	2400 - 2996
Failed (0-59%)	0 - 119.8	0 - 239.6	0 - 479.2	0 - 599	0 - 958.4	0 - 2396

Technical Scoring Session

DPHHS-RFP-2026-0682MQB
Legal Assistance

Date July 14, 2026
Time 9:00AM-12:00PM

Evaluation Committee Members:	#	First Name	Last Name
	1	Tessa	Bailly
	2	Gretchen	Hall
	3	Nate	Thomas

Subject Matter Experts: N/A
Contracts Officer: Michaela Barnicoat

Order of Evalution: Random
Scoring Method: Consensus

Product Demo/Interview

Date July 29, 2026
 11:00AM - 12:00PM
Time 1:00PM - 2:00 PM

Location Teams

Order of Demonstration/Interview: First come, first serve
Scoring Method: Consensus