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Deputy Secretary

***PRE-PROPOSAL CONFERENCE SUMMARY***  
***MARCH 6, 2014***

**PROJECT TITLE:**  
**EMPLOYEE ASSISTANCE PROGRAM**

**SOLICITATION NUMBER – F10B4400008**  
**DBM EMPLOYEE AND LABOR RELATIONS DIVISION**

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference on Thursday, March 6, 2014, in Conference Room 545 of 201 West Preston Street, Baltimore, MD 21201. An Attendance List is included with this summary as Attachment 1. Attending on behalf of the State were: Mr. Joseph Horvath, Contract Manager ELRD; Ms. Jennifer Schmidt, Director of Operations, Employee Benefits Division; Ms. Patti Tracey, Procurement Analyst; Mr. Thomas McLamore, MBE Liaison; Mr. Noel Cruse, consultant, Segal; Ms. Susan Kappel, consultant, Managed Care Advisors; and Ms. Rachel Hershey, Procurement Officer.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer convened the conference at 11 a.m. by recognizing the State personnel present as identified above and asking attendees to introduce themselves.

Ms. Hershey then reviewed the RFP:

- Section 1 – General Information (reviewed summary statement, contract commencement and duration, procurement officer/contract manager, submission of questions, closing date & time of proposals submission, and applicable attachments);
- Section 2 – Minimum Qualifications of Offerors, including the revision to Minimum Qualifications to delete Private Review Agent certification as detailed in Amendment 1 dated Feb. 28, 2014;
- Section 4 – Proposals Submission Requirements (reviewed content of proposals submission);
- Section 5 – Evaluation Criteria and Selection Procedure (reviewed technical evaluation criteria, financial criteria, selection process sequence and selection procedures);

Mr. Joseph Horvath presented a high-level overview of the scope of work in the RFP:

**~Effective Resource Management~**

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- Section 3 – Scope of Work;

Ms. Hershey reviewed Attachment F – Financial Proposal and instructions on how to complete the Financial Form, Attachment Q, Attachment R, and Attachment S.

Ms. Hershey then opened the floor to questions with the caveat that formal written answers to questions would be given if the question were submitted to her in writing, preferably by e-mail. Vendors asked several questions asked at the conference were asked to submit those questions in writing via e-mail for an official, coordinated response.

The conference was adjourned around 12:30 p.m.

Date Issued: March 13, 2014

By: <signed>

Rachel Hershey  
Procurement Officer

Attachment 1:

Pre-Proposal Conference Attendance List

Attachment 2:

Pre-Proposal Agenda