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PRE-PROPOSAL CONFERENCE SUMMARY PROJECT No. F10B6400003

Audit Services for State Employee and Retiree Health and Welfare Benefits Program

February 11, 2016

Ladies/Gentleman:

The State of Maryland conducted a Pre-Proposal Conference at the State Office Complex, Baltimore, MD, on February 10, 2016. An attendance list with the names of those attendees signing in and their business cards are located as Attachment 1.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer convened the conference, and introduced the State and Department (DBM) staff present.

The Procurement Officer, Joy Epstein, reviewed the following sections of the RFP:

Section 1-reviewed the procurement requirements of the RFP.

Section 2-reviewed the minimum qualification and that failure to meet it will deem the offer as being not susceptible of receiving an award.

Section 4-reviewed the proposal format and the importance of organization and clarity in preparing a proposal to enable effective evaluation team reviews.

Section 5-explained the evaluation process and how the State will select the most advantageous proposal through the technical ranking of offerors without a point system. Emphasized that financial data must not be included in the technical evaluation.

The following Attachments were also reviewed:

Attachment A- pointed out that the contract has mandatory terms and conditions. Reminded offerors that any exceptions to the terms and conditions of the contract form must appear in the executive summary of the proposal.

Attachment B-emphasized all blanks are to be filled in and that "domestic corporation" means a corporation registered in Maryland and that a "foreign corporation" means a corporation not registered in Maryland. Explained the importance of the resident agent and being consistent with the registration contained in the Department of Taxation and Assessment's database.

Attachment C-explained the contract affidavit is reaffirmation of bid/proposal affidavit and not submitted with the proposal.

Attachment D- explained the Minority Business Enterprise forms.

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Attachment F-explained Price Proposal Instructions and Form.
Attachment G-explained that the Living Wage requirements.
Attachment H-explained CY2015 Data
Attachment I-explained Conflict of Interest Affidavit requirements.
Attachment J-explained the Non-Disclosure Agreement requirements.
Attachment K-explained the HIPAA Agreement requirements.
Attachment L-explained the Audit period/Audit cycle.
Attachment M-explained Veteran-owned Small Business Enterprise attachment requirements.
Attachment N-explained Location of Performance of Services requirements.
Attachment O-reviewed the Current and Future Contracts/RFP information.
Attachment P- explained the Certification of review of Contracts/RFPs.

The Director of Fiscal Services, Steve Hamlett reviewed:

Section 3-reviewed the Scope of Work section which outlined the Audit Services work content.

The MBE Liaison, Tom McLamore, reviewed:

The MBE and VSBE program and highlighted the MBE and VSBE form submission requirements.

Then the floor was opened to questions with the caveat that formal written answers to questions would be sent within one week's timeframe of the preproposal conference.

Sincerely,



Joy Epstein
Procurement Officer

Enc: Attachment 1