



MARTIN O'MALLEY
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ANTHONY BROWN
Lieutenant Governor

T. ELOISE FOSTER
Secretary

DAVID C. ROMANS
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY
October 24, 2007, 10:00 AM
Project No. F10B8200006

**Project Title: Group Term Life and Personal Accident
and Dismemberment (PA&D) Insurance**

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference in Room 164A/B, 45 Calvert Street, Annapolis, MD 21401, on October 24, 2007. An attendance list with the names of those attendees signing in is Attachment 1.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer, Joe Gatto, convened the conference, recognized the State and Department (DBM) people present, and reiterated that all vendors should sign in.

Mr. Norm Grinnell then reviewed the RFP:

- Section 1—General Information (reviewed topics related to method, type, duration, terms and conditions of the solicitation);
- Section 2—Minimum Qualifications (reviewed importance of the min quals in that if not met, an Offeror's proposal would not make it to the evaluation stage);
- Section 4—Proposal Submission Format (reviewed all the elements required to meet administrative and content requirements for technical and financial proposals);
- Section 5—Evaluation Criteria and Selection Procedure (explained evaluation process and how State selects the best proposal);
- Attachment A—Contract (pointed out that RFP, contract and contractor proposals represent State expectations and requirements and that all referenced exhibits are included in the contract);
- Attachment B—Bid/Proposal Affidavit (emphasized all blanks are to be filled in and that "domestic corporation" means a corporation registered in Maryland and a foreign corporation means a corporation not registered in Maryland; also, the affidavit must be submitted with the tech proposal);
- Attachment C—Contract Affidavit (explained contract affidavit is reaffirmation of bid/proposal affidavit and not required to be submitted with the technical proposal);
- Attachment D—Minority Business Enterprise Participation (reviewed MBE subcontracting goal and explained the fact some MBE forms errors are not curable and that forms must be submitted to remain as an Offeror) (Presented by Mr. Tom McLamore);
- Attachment F—Price Proposal Instructions and Form (discussed elements of price sheets and that conditions are not acceptable);

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- Attachment G—Procurement Officer’s Checklist (advised Offerors to use checklist to be certain all required elements of the proposal are present in the submission);
- Attachment I—Non-Disclosure Agreement (NDA) (explained access to protected information on eligible and insured members can be granted only after execution of the NDA);
- Attachment J—Living Wage Requirements for Service Contracts (explained the Living Wage law provisions and the requirements for State Contractors under the law);
- Attachment K—Living Wage Affidavit of Agreement (explained the affidavit means acceptance of the terms of the Living Wage law and a promise to comply with reporting requirements); and
- Attachment L—Performance Guarantees and Liquidated Damages (explained liquidated damages are not penalties but a representation of the cost to the State of a failure to perform; liquidated damages used as a contract management tool in monitoring and assuring performance standards and deliverables under the contract are met).

Ms. Anne Timmons reviewed the work requirements of the RFP:

- Section 3—Scope of Work (reviewed the background, eligible population served and insurance requirements for both group life and PA&D)

Mr. Grinnell reviewed ten of the questions asked so far with the promise to provide written responses to the questions asked thus far. The floor was then opened to questions with the caveat that formal written answers to questions would only be given if the question were submitted in writing, preferably by e-mail. The questions covered issues such as MBE performance on the current contract, descriptive information for contractor produced brochure, PA&D exclusions, how soon census information would be transmitted after receipt of the non-disclosure agreement, when a MBE firm has to be identified for submission, dedicated phone lines for direct help and the number of covered lives for PA&D.

The attendees were reminded responses given verbally and other general discussions were non-binding and provided to help give a better understanding of the State’s requirements. Mr. Grinnell further stated that any question asked and answered at the conference should be asked formally by e-mail if the questioner wanted a coordinated, official response.

Date Issued: October 24, 2007

By: <signed>

Joe Gatto
Procurement Officer

1 Attachment
Pre-Proposal Attendance List

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Name/Title/Company	E-Mail	Phone(s)	Physical Address	MBE
Tyrone Cypress, Sr. Sales Executive C R Dynamics	Cypress2001@earthlink.net	(410) 347-5600	7 East Redwood St, Suit 600 Baltimore, MD. 21202	Yes
Loretta Fuller, Insurance Specialist Insurance Solutions Assoc	loretta.fuller@theinsursolutions.com	(301) 505-6006	5620 St. Barnabas Rd. Suite LL-150 Oxon Hill, MD. 20745	Yes
Christopher Smith, VP The Barbour Group	crsmith@thebarbourgroup.com	(410) 876-9610	73 Main St, Suite B Westminster, MD. 21157	Yes
Elicia McIntyre, Dir. Gov. Programs Human Capital Consultants, LLC	emcintyre@humancapitalllc.com	(410) 953-0003	8850 Stanford Blvd. Suite 2300 Columbia, MD. 21045	Yes
Harsh Singh, President The Josen Company	harsh@JosenCompany.com	(410) 964-3335	10430 Shaker Dr, Suite 210 Columbia, MD. 21046	Yes
Arthur A. Holland, Pres. & CEO NJ & C Insurance Services	aholland@njcservices.com	(410) 385-0500	10 N. Calvert St, Suite 646 Baltimore, MD. 21202	Yes
Anthony Ambush, Pres. AMBUSH Associates, Inc.	tony@ambushinsurance.com	(301) 681-9270	P. O. Box 3729 Silver Spring, MD. 20918	Yes
Chris Lawson, Pres. Insuraty	clawson@insuraty.com	(301) 249-9554	802 Palatine Place Bowie, MD. 20716	No
Jodi Menne, Mgr. Underwriting Angelo Rivera, Benefits Specialist The Standard	arivera@standard.com jmenne@standard.com	(301) 429-7342 (301) 429-7363	4200 Parliament Place Suite 550 Lanham, MD. 20706	No
Karen Wassmann, Sr. Account Mgr. Mike Bognanni, Account Executive The Hartford	karen.wassmann@hartfordlife.com michael.bognanni@hartfordlife.com	(443) 364-5145 (443) 364-5141	6011 University Blvd. Suite 330 Ellicott City, MD. 21043	No
William Binion, Regional Director Jennifer Truby, Client Executive MetLife	wdbinion@metlife.com jtruby@metlife.com	(410) 290-5653 (410) 290-5630	8825 Stanford Blvd. Suite 105 Columbia, MD. 21045	No
Robert Armstrong, Sr. Account Executive Aetna	armstrongrs@aetna.com	(703) 903-7003	2010 Corporate Ridge Rd. Suite 300 McLean, VA. 22102	No
Keith Schaub, Asst. V.P. Transamerica Affinity Services	kschaub@aegonusa.com	(410) 209-5298	520 Park Avenue Baltimore, MD. 21201	No
Scott Hedsepeth Aegon	shedsepeth@aegonusa.com		520 Park Avenue Baltimore, MD. 21201	No
Wes Strong Minnesota Life	wesley.strong@securian.com	(651) 665-5121	400 Robert Street, North St. Paul, MN.	No
Connie A. Cottrill Minnesota Life	connie.cottrill@securian.com	(724) 933-7190	7500 Brooktree Dr, #105 Wexford, PA. 15090	No