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Governor

BOYD K. RUTHERFORD
Lieutenant Governor

DAVID R. BRINKLEY
Secretary

MARC L. NICOLE
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY

PROJECT TITLE:

CONSULTING AND ACTUARIAL SERVICES FOR THE MARYLAND STATE EMPLOYEE AND RETIREE HEALTH AND WELFARE BENEFITS PROGRAM

***SOLICITATION NUMBER – F10B7400031
APRIL 24, 2017***

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference on April 24, 2017, at Maryland Department of Budget and Management, 45 Calvert Street, Conference Room - 164, Annapolis, MD 21401. An Attendance List is issued with this summary in a separate document.

Attending on behalf of the State were: Anne Timmons, Director of Employee Benefits and Contract Manager for the Contract that will result from this solicitation; W. Steven Hamlett, Program Manager for Employee Benefits Fiscal Services; Renee Hammock, Manager of Employee Benefits Customer Service; Thomas McLamore, MBE Liaison; and Tiffany Murriel, Procurement Officer.

This document summarizes the Pre-Proposal Conference. The Procurement Officer convened the conference around 11:00 a.m. and recognized the State personnel present as identified above.

The Procurement Officer then reviewed the following sections of the Request for Proposals:

- RFP Key Information Summary Sheet;
- Section 1 – General Information (including the summary statement, contract type and duration, procurement officer, contract monitor, eMaryland Marketplace, submission of questions, closing date & time of proposals submission, award basis, oral presentation, duration of proposals, revisions to the RFP, and Minority Business Enterprise and Veteran-Owned Small Business Enterprise goals applicable to the Consulting portion only);
- Section 4 – Proposal Format and Submission Requirements (reviewed content and format of proposal submission);
- Section 5 – Proposal Evaluation and Selection (reviewed evaluation committee, technical and financial proposal evaluation criteria, selection process, and award determination); and

Anne Timmons and Renee Hammock provided a summary of the current benefits program in the RFP:

- Section 2 – Description of Current Benefits Program.

Anne Timmons and W. Steven Hamlett provided a summary of the scope of work in the RFP:

- Section 3 – Scope of Work.

Mr. Thomas McLamore provided an explanation of the MBE and VSBE forms:

- Attachment D-1A – MBE Form; and
- Attachment M – VSBE Form.

The Procurement Officer continued with a review of the remaining sections of the Request for Proposals:

- SOC 2 Type 2 Audit Report [Section 3]; and
- Attachments – Attachment A – Contract, Attachment B – Bid/Proposal Affidavit, Attachment C – Contract Affidavit, Attachment F – Financial Proposal Form, Attachment P – Current and Future Benefits Contracts, Attachment Q – State Benefit Employee Enrollment Data by Plan and Coverage.

Ms. Murriel then solicited questions from attendees. She advised that questions asked at the Pre-Proposal Conference would be answered formally in writing if the question(s) were submitted in writing. Attendees asked several questions at the conference.

The attendees were reminded that responses to questions and other general discussions **do not** change the provisions of the RFP and that only a formal Amendment can change RFP requirements. Responses given at the conference were intended to aid in understanding the State's requirements. The attendees were also reminded of Amendment #1, released April 18, 2017, which revised the Procurement Officer's phone number and Section 1.37, Conflict of Interest Affidavit and Disclosure. The attendees were also advised of a forthcoming Amendment #2. The Conference was adjourned around 11:45 a.m.

Date Issued: April 24, 2017

By: <signed>

Tiffany Murriel
Procurement Officer

Attachment 1:

Pre-Proposal Conference Attendance List
Pre-Proposal Sign-In Sheets

Attachment 2:

Pre-Proposal Conference Agenda

PRE-PROPOSAL CONFERENCE ATTENDANCE LIST

MBE	Name/Company	E-mail	Phone(s)	Physical Address
No	Korn Ferry/HayGroup	Steven.Kapper@kornferry.com	703-841-3179; 202-903-6322	12012 Sunset Hills Rd., Suite 920, Reston, VA 20190
No	Segal Consulting	djohnson@segalco.com	202-833-6482; 917-617-0581	1800 M Street NW, Suite 900 S, Washington, DC 20036-5802
No	Segal Consulting	akolick@segalco.com	202-833-6477	1800 M Street NW, Suite 900 S, Washington, DC 20036-5802
No	Conduent	Hope.Manion@conduent.com	610-651-8525; 215-679-7271; 215-694-7922	902 Cassatt Road, Suite 110, Berwyn, PA 18056
No	Conduent	Kelly.conlin@conduent.com	610-651-8531	200 Berwyn Park, Suite 110, Berwyn, PA 19312
No	Conduent	Jeff.dussault@conduent.com	202-962-7811	1800 M Street, NW, Suite 525N, Washington, DC 20036
No	Alexander & Cleaver Attorneys At Law	lbellamy@alexander-cleaver.com	410-974-9000; 202-558-8304	54 State Circle, Annapolis, MD 21401- 1904
Yes	Managed Care Advisors	skappel@managedcareadvisors.com	301-469-1660	7700 Old Georgetown Road, Suite 750, Bethesda, MD 20814
No	Bolton Partners	mlynn@boltonpartners.com	443-573-3902; 410-241-7514	36 S. Charles St., Suite 1000, Baltimore, MD 21201
No	Bolton Partners	gadams@boltonpartners.com	N/A	36 S. Charles St., Suite 1000, Baltimore, MD 21201
Yes	Walker Benefit Services, LLC	court@walkerbenefitservices.com	443-536-1056	4354 Butler Road, PO Box 134, Glyndon, MD 21071
No	McQuade Consulting	ldiemer@mcquadeconsulting.com	410-732-7320 Ext. 110; 410-980-7409	720 South Montford Avenue, Baltimore, MD 21224