



LARRY HOGAN
Governor

BOYD K. RUTHERFORD
Lieutenant Governor

DAVID R. BRINKLEY
Secretary

MARC L. NICOLE
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY

***PROJECT TITLE:
GOVERNMENT EFFICIENCY AND MANAGEMENT SOLUTIONS***

***SOLICITATION NUMBER – 050B7400006
DECEMBER 21, 2016***

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference on December 21, 2016, at the 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: Mr. Marc Nicole, Department of Budget and Management Deputy Secretary and Contract Manager for the Contract that will result from this solicitation; and Ms. Andrea R. Lockett, Procurement Officer.

This document summarizes the Pre-Proposal Conference. The Procurement Officer convened the conference around 1:00 p.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);
- Section 2 – Minimum Qualifications of Offerors;

Mr. Marc Nicole provided a summary of the scope of work in the RFP:

- Section 3 – Scope of Work.

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

- 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);
- Attachments – Attachment A – Contract, Attachment B – Bid/Proposal Affidavit, Attachment C – Contract Affidavit, Attachment D-1-Master – MBE Form, Attachment F – Financial Proposal Form, Attachment O – Overview of Agencies Listed in RFP §3.1 (which includes website hyperlinks to obtain statistics regarding the State of Maryland).

Ms. Lockett 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 December 14, 2016, which revised the Proposal Due (Closing) Date on the Key Information Summary Sheet to January 12, 2017 (originally stating 2016) [the 2:00 p.m. time for receipt of proposals remains the same] and the Procurement Officer's email address on Attachment E, and an upcoming Amendment #2 to clarify various RFP Sections, among them §1.1.4. No further questions were asked. The Conference was adjourned around 2:00 p.m.

Date Issued: December 22, 2016

By: <signed>

Andrea R. Lockett
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 | John Cape / PFM Group Consulting LLC | capej@pfm.com | V: 215-567-6100 | 1735 Market Street, 43 rd Floor Philadelphia, PA 19103 |
| No | Pam S. Pitman / Ernst & Young LLP | pam.pitman@ey.com | V: 410-783-3937 | 621 East Pratt Street Baltimore, MD 21202 |
| No | Sarah Ray / McKinsey & Company | sarah_ray@mckinsey.com | V: 901-497-6360 | 1200 19 th Street NW Suite 1100 Washington, DC 20036 |
| No | Daniel Harlan / Alvarez & Marsal | dharlan@alvarezandmarsal.com | V: 202-688-4276 | 555 Thirteenth Street NW 5 th Floor West Washington, DC 20004 |
| No | Zoe Paterson / ThoughtLayer | zoe.paterson@thoughtlayer.com | V: 443-745-4766 | No information provided |
| No | Tony Vachino / ThoughtLayer | tony.vachino@thoughtlayer.com | V: 410-218-8281 | No information provided |
| No | Edward J. Donahue III / Municipal & Financial Services Group | edward.donahue@mfsllc.com | V: 443-931-4212 | 911-A Commerce Road Annapolis, MD 21401 |
| No | Eric M. Callocchia / Municipal & Financial Services Group | eric.callocchia@mfsllc.com | V: 410-266-9101 | 911-A Commerce Road Annapolis, MD 21401 |
| No | Eric Schnurer / Public Works, LLC | eschnurer@public-works.org | V: 610-296-9443 | 1690 E. Strasburg Road West Chester, PA 19380 |
| No | Tyler Duvall / McKinsey & Company | tyler_duvall@mckinsey.com | V: 202-579-4875 | 1200 19 th Street NW Suite 1100 Washington, DC 20036 |
| No | Mark Wiggins / Deloitte Consulting LLP | mawiggins@deloitte.com | V: 410-843-3222 | 12 th Floor 100 S. Charles Street Baltimore, MD 21201 |
| No | John Olszewski, Jr. / SAS Institute Inc. | johnny@olszewski@sas.com | V: 919-531-3599 | 211 Patapsco Avenue Baltimore, MD 21222 |
| No | Miruna Burk / Accenture Consulting | miruna.p.burk@accenture.com | V: 703-947-3833 | 800 North Glebe Road Suite 300 Arlington, VA 22203 |
| No | Mark Hoesch / Pricewaterhouse Coopers Advisory LLC | mark.hoesch@us.pwc.com | V: 703-918-1904 | 1800 Tysons Blvd McLean, VA 22102 |

Government Efficiency and Management Solutions
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and Attendance List
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| MBE | Name/Company | E-mail | Phone(s) | Physical Address |
|-----|---|--|---------------------|---|
| No | Christopher Huff / Deloitte Consulting LLP | chuff@deloitte.com | V: 571- 882-7087 | 1919 North Lynn Street Arlington, VA 22209 |
| No | Ashley Japngie / Alvarez & Marsal | ajapngie@alvarezandmarsal.com | V: 202- 688-4298 | 1001 G Street NW Suite 1100 West Washington, DC 20001 |
| No | John Beakes, Jr. / Operational Performance Solutions, Inc. | jbeakes2@opsgroupinc.com | V: 443- 253-9377 | 909 Baltimore Blvd Westminster, MD 21157 |
| No | Butler Newman / GP Strategies | bnewman@gpstrategies.com | V: 443- 539-8569 | 70 Corporate Center 1100 Broken Land Parkway, Suite 200 Columbia, MD 21044 |
| No | Tina Chen-Xu / PCG Human Services | tchenxu@pcgus.com | V: 617- 717-1449 | 148 State Street, 10 th Floor Boston, MA 02109 |
| No | Pat Weidmann / Navigator Management Partners | pweidmann@navmp.com | V: 443- 562-5351 | No information provided |
| No | Drena Valentine / Integrative Management Solutions | dvalentine@integrativemgmtsolutions.com | V: 301- 938-9102 | 13423 Tamarack Road Silver Spring, MD 20904 |
| No | April DuBois / McKinsey & Company | april_dubois@mckinsey.com | V: 202- 662-3143 | 1200 19 th Street NW Suite 1000 Washington, DC 20036 |
| Yes | Samuel Foster / Fostersoft Inc. | sam@fostersoft.com | V: 240- 514-0284 | 4641 Montgomery Avenue, Suite 401 Bethesda, MD 20814 |
| No | Patrick Bobb / The Robert Bobb Group LLC | patrick@robertbobbgroup.com | V: 202- 624-7432 | 975 F Street NW Suite 230 Carroll Square Washington, DC 20004 |
| No | John Fraser / Grant Thornton | john.fraser@us.gt.com | V: 703- 373-8665 | 333 John Carlyle Street Suite 500 Alexandria, VA 22314 |