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ANTHONY BROWN
Lieutenant Governor

T. ELOISE FOSTER
Secretary

DAVID C. ROMANS
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY
Thursday, May 13, 1:00 PM

Audit Services for State Employee and Retiree Benefits Program

Solicitation No. F10B0400010

May 14, 2010

Ladies/Gentleman:

The Department of Budget and Management (DBM) conducted a Pre-Proposal Conference at the State Office Complex, Baltimore, MD, on May 13, 2010. An attendance list is attached.

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

The Procurement Officer, Joy Epstein, reviewed the RFP:

Section 1-reviewed information related to the terms and conditions and requirements of the solicitation and emphasized the importance of the MBE goal.

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

Section 3-was covered by the Fiscal Services Manager, Jake Pyzik.

Section 4-reviewed the proposal format and the importance of organization and clarity in preparing a proposal to enable effective evaluation team reviews. Emphasized the need to provide corporate experience performing healthcare audits and should include at least one government reference.

Section 5-explained the evaluation process and how the State will select the most advantageous proposal through the technical ranking prior to the opening of the financial proposals with technical having equal weight as financial. Emphasized that financial data must not be included in the technical evaluation.

The following Attachments were 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;

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Attachment B-emphasized the importance of filling out the bid affidavit to confirm compliance with all information pertained in the form;
Attachment C-explained the contract affidavit is reaffirmation of bid/proposal affidavit and not submitted with the proposal;
Attachment D- explained the importance of submitting the D-1 MBE form with the proposal to avoid being rejected;
Attachment F-explained Price Proposal Instructions and Form;
Attachment G-explained that Attachment G is provided as a separate attachment and it for information purposes regarding the current population;
Attachment H-emphasized the importance of filling out the conflict of interest affidavits for both the prime and subcontractors;
Attachment I-explained this attachment provided information on the current benefits contracts;
Attachment J-explained that this attachment provided the plan year to be audited for the various plans;
Attachment K-explained that this attachment is to certify the review of the contracts/rfp's;
Attachment L- explained the importance of filling out the living wage affidavit; and
Attachment M-explained the purpose of the Procurement officer's checklist.

The State of Maryland's Employee Benefits Fiscal Services Manager, Jake Pyzik, provided a detailed summary of each area of the RFP Section 3, Scope of Work. Emphasized the importance of explaining how the offeror will be conducting the audit reviews. Each section of the Scope of Work was discussed in terms of requirements and expectations.

The State of Maryland's Minority Business Liaison, Tom McLamore, summarized the MBE subcontractor goals and participation and emphasized the need to fill out the D-1 form for each of the 5 categories of work being submitted in order for the proposal to be accepted. In addition, the importance of the MBE percentage of work for the entire contract value for each category was emphasized and that the MBE must be Maryland MDOT certified. No financial information should be included on the forms, only percentages.

Then the floor was opened to questions with the caveat that formal written answers to questions would be sent shortly.

Joy Epstein

Procurement Officer

Attachment 1:Pre-Proposal Attendance List