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## **PRE-PROPOSAL CONFERENCE SUMMARY**

**March 25, 2011, 10:00 am**  
**Project No. 050B0400001A**

### **Project Title: State Medical Director & Occupational Medical Services for Maryland State Agencies**

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference for the rebid of the State Medical Director & Occupational Medical Services for Maryland State Agencies RFP at the Department of Budget and Management in Annapolis, Maryland on March 25, 2011. An attendance list with the names of those attendees signing in has been distributed along with this Summary.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer, Patti Tracey, convened the conference, recognized the State personnel present, and reminded all vendors to sign the attendance list. Vendors were provided with copies of the Pre-Proposal Conference Agenda and a list of Questions Received to Date for the RFP. The vendor lists and Q&A #1 will be posted with this summary as well.

Ms. Tracey then reviewed the RFP:

- Section 1 - General Information (reviewed topics related to proposal closing date, questions, contract type, duration, terms and conditions of the solicitation, and required affidavits);
- Section 2 – Offeror Minimum Qualifications;
- Section 3 – Scope of Work (including provisions specifically pertaining to the Department of Juvenile Services (DJS), Department of Transportation (MDOT) and Maryland Transit Administration (MTA) Mobility)
- Section 4 – General Requirements (items discussed included personnel, facilities, records and reports, right to audit, and insurance requirements)
- Section 5 - Proposal Format (reviewed the submission formats for technical and financial proposals);
- Section 6 - Evaluation Criteria and Selection Procedure (explained the evaluation process including Technical and Financial Criteria);
- Attachments (emphasized those Attachments that are required to be completed and submitted with the proposal). Discussed Attachment D-6 Guidelines for Proper Minority Business Enterprises (MBE) Submission, which will be issued as an Amendment in the near future.

~Effective Resource Management~

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Ms. Margaret Embardino reviewed the work requirements of Section 3 as they pertained to overall services to be performed under the RFP. She also reviewed Section 3.3.15 as it pertained to the DJS and how that Department utilizes the section.

Ms. Ellen Brown reviewed Sections 3.3.20.2 through 3.3.20.5 by discussing the evaluation process utilized by the MTA's Mobility Department.

Ms. Robin Henry reviewed Sections 3.3.12, 3.3.21, 3.3.22 and 3.3.23 as they pertain to the MDOT.

Ms. Patti Tracey and Mr. Joel Leberknight reviewed the MBE requirements of the RFP:

- Section 1.26 – MBE (reviewed the MBE participation goal, commitments and responses, anticipated subcontracting opportunities, and required MBE affidavits)
- Advised that this RFP has a 10% MBE goal which was reduced from the previous RFP.
- Attachment D-1 (reviewed the procedure for submitting the MBE Utilization and Fair Solicitation Affidavit, emphasizing the importance of correctly completing each section of the form)
- Discussed proper guidelines for MBE participation goal submission.

Ms. Tracey and Mr. Leberknight reviewed Attachment F Financial Proposal Forms and how they are to be completed and then discussed economy of scales pricing discounts that Offerors may give to the State in their financial proposals.

Ms. Tracey opened the floor to questions with the caveat that formal written answers to questions would only be given if the questions were submitted in writing, preferably by e-mail. Questions were raised regarding the Scope of Work, proposal format, and RFP attachments.

The attendees were reminded that responses given verbally and other general discussions were non-binding and provided to help give a better understanding of the State's requirements. Ms. Tracey further reiterated that any question asked and answered at the conference should be asked formally by e-mail if an official response is being requested.

Date Issued: March 30, 2011

By: <signed>

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Patti Tracey  
Procurement Officer