



MARYLAND
DEPARTMENT OF
BUDGET & MANAGEMENT

LAWRENCE J. HOGAN, JR.
Governor

BOYD K. RUTHERFORD
Lieutenant Governor

DAVID R. BRINKLEY
Secretary

PRE-PROPOSAL CONFERENCE SUMMARY
FEBRUARY 27, 2015

PROJECT TITLE:
AUDIT SERVICES FOR MARYLAND STATE AGENCIES

SOLICITATION NUMBER – 050B5400001R

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference on February 20, 2015, at the Department of Budget & Management (DBM), 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: Mrs. Jamie Tomaszewski, Contract Manager; Mr. Thomas McLamore, DBM MBE Liaison; Mrs. Joan Peacock, Manager of the DBM Audit Compliance Unit; and Mr. James Adelman, Procurement Officer.

This Summary documents the Pre-Proposal Conference. The Procurement Officer convened the conference around 11 a.m. and recognized the State personnel present as identified above. Attendees were informed that a summary of the Pre-Proposal Conference and a copy of the sign-in sheets would be emailed to them. The Procurement Officer stated that there would be a review of each section of the Request for Proposals followed by a Question and Answer Period. Attendees were also informed that questions could be asked at any time.

All sections of the Audit Services Request for Proposals were reviewed as follows:

- Section 1 – General Information (reviewed contract type and duration, procurement officer and contract manager, submission of questions, closing date & time of proposal submission, submission of questions, award basis, and revisions to the RFP) – reviewed by Mr. Adelman;
- Section 1 – Minority Business Enterprise (MBE) and Veteran-Owned Small Business Enterprise (VSBE) programs, contract goals for those programs, and required forms as set forth in Sections 1.33 and 1.41 and associated attachments of the RFP document – reviewed by Mr. McLamore;
- Section 2 – Minimum Qualifications of Offerors – reviewed by Mr. Adelman;
- Section 3 – Scope of Work – reviewed by Ms. Tomaszewski;
- Section 4 – Proposal Submission Requirements (content and format of proposal submission) – reviewed by Mr. Adelman;

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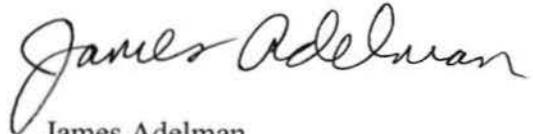
- Section 5 – Proposal Evaluation and Selection – reviewed by Mr. Adelman;
- Attachments – Mr. Adelman reviewed Attachments that are required to be submitted with Offerors' Proposals and Attachments that are potentially required for future Task Requests for Proposals (TORFPs).

Attendees asked several questions at the conference. At the conclusion of the Question and Answer period, Mr. Adelman advised attendees that formal written answers would follow the oral answers. He noted that questions asked at the Pre-Proposal Conference would be answered in writing only if the questions were submitted in writing.

The attendees were reminded that responses to questions and other general discussions did not change the provisions of the RFP and that only a formal Amendment can change RFP requirements. Responses given at the conference are intended to aid in understanding the State's requirements. The Conference was adjourned around 1:15 p.m.

Date Issued: February 27, 2015

By:



James Adelman
Procurement Officer

Attachment 1: Pre-Proposal Conference Attendance List

Attachment 2: Pre-Proposal Conference Agenda

DBM Audit Services for Maryland State Agencies RFP
Pre-Proposal Conference Sign-in Sheet
PROJECT #DBM 050B5400001R – February 20, 2015

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DBM Audit Services for Maryland State Agencies RFP
Pre-Proposal Conference Sign-in Sheet
PROJECT #DBM 050B5400001R - February 20, 2015



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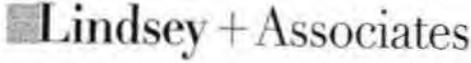
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**DBM Audit Services for Maryland State Agencies RFP
Pre-Proposal Conference Sign-in Sheet
PROJECT #DBM 050B5400001R – February 20, 2015**

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**PRE-PROPOSAL CONFERENCE AGENDA
FEBRUARY 20, 2015 – 11:00 AM**

**PROJECT TITLE:
AUDIT SERVICES FOR MARYLAND STATE AGENCIES**

SOLICITATION NUMBER – 050B5400001R

- I. Welcome and Introduction.....*James Adelman, Procurement Officer*
 - a. Introduction of State Attendees
 - b. Pre-Proposal Conference summary and sign-in sheet(s) will be emailed
- II. Review of RFP Sections 1 and 2.....*James Adelman*
- III. Review of MBE and VSBE Program.....*Thomas McLamore, DBM MBE Liaison*
- IV. Review of RFP Section 3 (Scope of Work)*Jamie Tomaszewski, Contract Manager*
- V. Review of RFP Sections 4 & 5.....*James Adelman*
- VI. Review of Attachments.....*James Adelman*
- VII. Question and Answer Period

Questions pertaining to the current topic of discussion may be raised at that time. It is not necessary to wait until the Q&A Period.

Notes: Minutes of the Pre-Proposal Conference will not be transcribed, although the State will provide a written summary after the conference. Any substantive questions should be submitted to the Procurement Officer in writing, preferably via email. Questions submitted in writing will receive a written response that will be issued to all vendors.

Answers provided to questions raised at the Pre-Proposal Conference may be subject to clarification. No answers or other statements given at the Pre-Proposal Conference can alter or amend the RFP; only a formal amendment can change the substance of the RFP. In the event that substantive issues arise necessitating an amendment to the RFP, all offerors known to have received a copy of the solicitation will receive the amendment.

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