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PRE-PROPOSAL CONFERENCE SUMMARY
Project No. F10R7200018

Project Title: Audit Services for State Employee and Retiree Benefits Program
August 14, 2006

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference in Room L-1 at 201 W. Preston Street, Baltimore, MD 21202, on August 14, 2006. An attendance list with the names of those attendees signing in is Attachment 1.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer convened the conference, recognized the State and Department (DBM) people present, and reiterated that all vendors sign in.

Mr. Norman Grinnell then reviewed the RFP:

- Section 1—General Information (reviewed nearly every point related to method, type, duration, terms and conditions of the solicitation)
- Section 2—Offeror Minimum Qualifications (emphasized self certification of experience must be included with the Technical proposal)
- Section 4—Proposal Submission Format (reviewed all the elements required to meet administrative and content requirements for technical and financial proposals)
- Section 5—Evaluation Criteria and Selection Procedure (explained evaluation process and how State selects best proposal)
- Attachment A—Contract (pointed out that RFP, contract and contractor proposals represent State expectations and requirements)
- Attachment B—Bid/Proposal Affidavit (emphasized all blanks are to be filled in and that “domestic corporation” means a corporation registered in Maryland)
- Attachment C—Contract Affidavit (explained contract affidavit is reaffirmation of bid/proposal affidavit)
- Attachment D—Minority Business Enterprise Participation (explained law change in October 2004 and fact some MBE forms errors are not curable and that forms must be submitted to remain as an Offeror)
- Attachment F—Price Proposal Instructions and Form (discussed elements of price sheets and that conditions are not acceptable)
- Attachment H—Conflict of Interest Affidavit/Disclosure (required submission)
- Attachment M—Certification of Review of Contracts/RFPs (required submission)

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- Attachment N—Procurement Officer’s Checklist (advised Offerors to use checklist to be certain all required elements of the proposal are present in the submission)

The State’s Contract Manager, Mr. Jake Pyzik, reviewed the work requirements of the RFP,

- Section 3—Scope of Work (reviewed the background, audit requirements, audit report content, optional services, and other salient requirements)
- Attachments G—State Benefit Employee Enrollment Data by benefits Plan and Coverage Level (explained data showed current active employee benefits coverage)
- Attachment I—Current Benefits Contracts (explained that current contracts in this Attachment represent the contracts to be audited)
- Attachment K—Project Time Line (explained that the attachment represented a time line and the Offeror/Contractor plan to schedule and do the work requirements)
- Attachment L—Benefits Contractor Performance Guarantees (shows performance guarantees for current benefits contracts)

The floor was then opened to questions with the caveat that formal written answers to questions would only be given if the question were submitted in writing, preferably by e-mail. Mr. Norman Grinnell reviewed answers to 8 of 31 questions posed so far. The responses to those questions will be formally issued in Q&A documents. Additional questions from the floor covered optional services, combined responses, amount of in and out of State travel, health care data formats, when 100% audit is required, what the proper sample size is when 100% audit is not required, additional information about the evaluation process and what type of information from Offeror proposals/audit work product is subject to public release.

Responses were provided to a majority of the questions and in some cases, questioners were asked to submit the questions in writing to obtain a coordinated and written response. Mr. Grinnell additionally reminded attendees that any question asked and answered at the conference should be asked formally if the questioner wanted a formal response.

Date Issued: August 15, 2006

Michael Howard

<signed>

Procurement Officer

1 Attachment.
Audit Pre-Bid Attendance List

Pre-Bid Attendance List

Name/Title/Company	E-Mail	Phone(s)	Physical Address	MBE
Candace Shelton, Senior Consultant, Buck Consultants	Candace.Shelton@ buckconsultants.com	V: 410.870.0770 F: 410.870.0770	200 Berwyn Park, Suite 110; Berwyn, PA 19312- 1178	
Mark Butler, President, Butler-Lochte & Co.	mbutler@ butlerlochte.com	V: 410.494.1906 F: 410.494.1945	1301 York Road, Suite 502 Lutherville, MD 21093	Yes
Charles Pefinis, Unknown, Caddo Office Products	cpefinis@ caddocentral.com	V: 410.660.3221, X-7202 F: 301.362.4603	8300-A Stayton Drive Jessup, MD 20794	Yes
Sandra Pefinis, Unknown, Caddo Office Products	spefinis@ caddocentral.com	V: 410.660.3221, X-7204 F: 301.362.4603	8300-A Stayton Drive Jessup, MD 20794	Yes
Frank Spasoff, Partner, Cherry,Bekaert & Holland, L.L.P.	fspasoff@cbh.com	V: 703.584.0230 F: 703.506.8817	1934 Old Gallows Road, 4 th Floor Vienna, Virginia, 22182	
Jim Anderson, Unknown, Cherry,Bekaert & Holland, L.L.P.	janderson@cbh.com	V: 703.584.0221 F: 703.506.8817	1934 Old Gallows Road, 4 th Floor Vienna, Virginia, 22182	
Thomas R. Rey, Jr., Senior Manager Clifton Gunderson, LLP	Thomas.Rey@cliftoncpa.com	V: 410.453.0900 F: 410.453.0914	Timonium Corporate Center, Suite 500 9515 Deereco Road Timonium, MD 21093	
David P. McSweeney Chief Operating Officer Healthcare Data Management, Inc.	McSweeney@healthaudit.com	V: 610-491-9800 X: 225 F: 610-992- 1054	1101 West Dekalb Pike Suite 202 Wayne, PA 19087	
Harsh Singh President The Josen Company	harsha@josencompany.com	V: 410.964.3335 301.596.4020 F: 410.997.6915	10430 Shaker Drive Suite 210 Columbia, MD 21046-2335	Yes

Name/Title/Company	E-Mail	Phone(s)	Physical Address	MBE
Robert R. (Buzz) Williams, Unknown, The Josen Company	buzz@josencompany.com	V: 410.964.3335 301.596.4020 F: 410.997.6915	10430 Shaker Drive Suite 210 Columbia, MD 21046-2335	Yes
Jan Moser, Senior Associate Mercer Health and Benefits	jan.moser@mercer.com	V:804.344.2618 F:803.344.2601	Three James Center 1051 East Canary Street, Suite 900 Richmond, VA 23219	
Jeff Truesdale, Account Manager Phoenix Printing	jtruesdale@phoenixprinting.com	V:301.279.8955 301.385.2424 F: 301.330.5859	14620 Southlawn Lane Rockville, MD 20850	Yes
Rosemary Womack, Unknown RMW Associates	licensedpa@aol.com	V:240.286.7737	P.O.Box 663 Cheltenham, MD 20623	Yes
Jocelyn M. Bryan, Unknown SB & Company, LLC	jbryan@sbandcompany.com	V: 410.584.9300 F: 410.584.0061	200 International Circle Suite 5500 Hunt Valley, MD 21030	Yes
Holland Nguyen, Unknown The Segal Company	hnguyen@segalco.com	V: 202.833.6465 F: 202.833.6490	1920 N Street, NW Suite 400 Washington, DC 20036-1659	
Sam Arthur, Director Information Technology Assurance & Control Thompson, Cobb, Bazilio & Associates, PC	sarthur@tcba.com	V:202.737.3300	1101 15 th Street, N.W. Suite 400 Washington, DC 20005	Yes
Carl W. Walker, Unknown Walker Benefit Services	carl@walkerbenefitservices.com	V: 410.833.7094 F: 410.833.7041	4354 Butler Rd. P.O. Box 134 Glyndon, MD 21071	Yes
Mary Ruilow, Unknown Bert Smith & Co	N/A	V: 202.393.5600 F: 202.393.5608	1401 New York Avenue, NW Washington, DC 20005	Yes