



MARTIN O'MALLEY
Governor

ANTHONY BROWN
Lieutenant Governor

T. ELOISE FOSTER
Secretary

DAVID C. ROMANS
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY
MAY 19, 2010 – 10:00 AM

PROJECT TITLE:
BEHAVIORAL HEALTH & EMPLOYEE ASSISTANCE PROGRAM (EAP) BENEFIT
ADMINISTRATION SERVICES

SOLICITATION NUMBER – F10B0400011

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference in the Harry Hughes Conference Room (Suite 2) of the Maryland Department of Transportation (MDOT) Headquarters located at 7021 Corporate Center Drive, Hanover, Maryland 21076, on May 19, 2010. An Attendance List is included with this summary as Attachment 1. Attending on behalf of the State were: Andrea R. Lockett, Procurement Officer; Panel Members – Bill Tress, Renee Hammock, Deborah Halterman; and Thomas McLamore, DBM MBE Liaison.

This Summary is being issued to document the Pre-Proposal Conference. The Procurement Officer, Andrea R. Lockett, convened the conference, recognized the State and Department (DBM) personnel present, and reiterated that all prospective offerors should sign in.

Ms. Andrea R. Lockett then reviewed the RFP:

- Vendor Comments (encouraged vendors to provide comments and/or suggestions whether or not a proposal is submitted to assist DBM in better bid/proposal writing in the future);
- Key Information Summary Sheet (reviewed proposal submission location; reviewed proposal submission closing date & time);
- Section 1 – General Information (reviewed scope and # of awards, contract type, contract duration, procurement officer/contract manager, closing date & time of proposals submission, submission of questions, MBE goal, multiple/alternate proposals, revisions to RFP, Public Information Act Notice, eMaryland Marketplace registration, Department of Assessments and Taxation registration, Confidentiality and Non-Disclosure, Living Wage, Prompt Pay Requirements, including a review of the Contract [Attachment A], Bid/Proposal Affidavit [Attachment B], Contract Affidavit [Attachment C], Confidentiality and Non-Disclosure Agreement [Attachment E], and Living Wage Affidavit [Attachment L];
- Section 4 – Proposals Submission Requirements (reviewed content of proposals submission);

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- Attachment A – Contract (pointed out that RFP, contract and contractor proposals submission represents State expectations and requirements and that all referenced exhibits are included in the contract by reference; further explained commercial nondiscrimination and prompt payment requirements);
- Attachment B – Bid/Proposal Affidavit (explained that all blanks must be filled in even if not applicable; explained that “domestic” means a company incorporated in Maryland and “foreign” means a company NOT incorporated in Maryland and that resident agent information should match Department of Assessments and Taxation website’s reporting; emphasized that affidavit must be submitted with technical proposal);
- Attachment C – Contract Affidavit (emphasized that affidavit is reaffirmation of bid/proposal affidavit; submission required only if awarded);
- Attachment E – Confidentiality and Non-Disclosure Agreement (explained that agreement must be submitted to the Procurement Officer in order to receive the confidential data necessary to complete technical proposals response; once received, the Offeror will receive the Confidential Documents referenced in Attachment N);
- Attachment L – Living Wage Affidavit (emphasized that affidavit must be submitted with technical proposals).

Mr. Bill Tress reviewed the minimum qualifications, overview of scope of work and project milestones/due dates in the RFP:

- Section 2 – Offeror Minimum Qualifications (reviewed experience, accreditations and proof of registration and/or certification submission requirements);
- Section 3 – Scope of Work (reviewed program description, desired plan design and description of scope of work);
- Attachment J – Technical Proposal (emphasized that information in all tabs must be submitted with proposals response);
- Attachment K – Financial Proposal (emphasized this information must be submitted sealed separately, but simultaneously with the Technical Proposal);
- Attachment M – Utilization Report Instructions.

Ms. Renee Hammock reviewed the background on behavioral health benefits in relation to the PPO, POS & EPO programs in the RFP.

Ms. Deborah Halterman reviewed the background on the Employee Assistance Program (EAP) in the RFP.

Mr. Tom McLamore reviewed the Minority Business Enterprise Forms:

- Attachment D – Minority Business Enterprise Participation (explained that the MBE forms had been recently revised and that only submission of Attachment D-1 (Certified MBE Utilization and Fair Solicitation Affidavit) completed in its entirety, to include the MBE Participation Schedule (which is now part of the affidavit) is required; also reviewed the 10% MBE subcontracting goal and explained the fact that some MBE form errors are not curable, such as goal ranges, a MBE firm proposing as a prime contractor and submitting themselves as a subcontractor to fulfill the MBE goal and submission of firms that are not MDOT MBE certified at the time of proposals submission).

Ms. Lockett then opened the floor 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.

The attendees were reminded responses given verbally and other general discussions were non-binding and provided to help give a better understanding of the State's requirements. Ms. Lockett further stated that any question asked and answered at the conference should be asked formally by e-mail if the questioner wanted a coordinated, official response.

Date Issued: May 25, 2010

By: <signed>

Andrea R. Lockett
Procurement Officer

Attachment 1:

Pre-Proposal Conference Attendance List

Attachment 1 – Pre-Proposal Conference Attendance List

Name/Title/Company	E-Mail	Phone(s)	Physical Address	MBE
Jack Dolan LifeSynch	jdolan2@lifesynch.com	(914) 762-3035 <i>office</i>	80 Brookwood Drive Briarcliff Manor, NY 10510	No
Daniel Poch APS Healthcare	dpoch@apshealthcare.com	(513) 745-8795 <i>office</i> (513) 288-4353 <i>cell</i>	44 South Broadway Suite 1200 Whiteplains, NY 10601	No
Jay T. Roundy Aetna	jay.roundy@aetna.com	(602) 659-1876 <i>office</i> (602) 478-8831 <i>cell</i>	4645 E. Cotton Center Boulevard Building 1 Phoenix, AZ 85040	No
Lisa Hadley APS Healthcare	lhadley@apshealthcare.com	(800) 305-3720 x4712 <i>office</i>	21 Governor's Court Suite 100 Baltimore, MD 21244	No
William M. Bowser Procurement Services Consulting, LLC	bbowser@pro-in-procure.com	(410) 870-3486 <i>office</i> (410) 952-0414 <i>cell</i>	PO Box 43388 Baltimore, MD 21236- 3388	No
Nancy LaRoche Aetna	larochen@aetna.com	(410) 487-2769 <i>office</i> (410) 691-1080 <i>cell</i>	509 Progress Drive Linthicum, MD 20190	No
Diana M. Favazza MHN	Diana.m.favazza@mhn.com	(917) 228-2339 <i>office</i> (917) 589-5058 <i>cell</i>	40 Wall Street New York, NY 10005	No
Lee B. Grinspan Magellan Health Services	lbgrinspan@magellanhealth.com	(901) 624-2227 <i>office</i>	7060 Manor Woods Germantown, TN 38138	No
Lynn Mueller ValueOptions	Lynn.mueller@valueoptions.com	(978) 409-1357 <i>office</i> (978) 806-6712 <i>cell</i>	1199 South Beltline Road Suite 100 Coppell, TX 75019	No
Nicole Cole National Insurance Consultants Incorporated	nc@niciinsure.com	(301) 322-8104 <i>office</i>	9701 Apollo Drive Suite 447 Largo, MD 20774	Yes
Wayne Beckles Culture of Success, Inc.	cultureofsuccess@gmail.com	(443) 540-1171 <i>office</i>	<i>unknown</i>	Yes
Yolanda Pulido APS Healthcare	ypulido@apshealthcare.com	(800) 305-3720 <i>office</i>	<i>unknown</i>	No
Tracy Isaac Magellan Health Services	trisaac@magellanhealth.com	(410) 953-2435 <i>office</i>	<i>unknown</i>	No
Randy Rauat National Insurance Consultants Incorporated	randy@ckrginc.com	<i>unknown</i>	<i>unknown</i>	Yes