



MARTIN O'MALLEY
Governor

ANTHONY BROWN
Lieutenant Governor

T. ELOISE FOSTER
Secretary

DAVID C. ROMANS
Deputy Secretary

PRE-PROPOSAL CONFERENCE SUMMARY
AUGUST 28, 2013 – 10:00 AM

PROJECT TITLE:
DENTAL PLAN ADMINISTRATION AND INSURANCE SERVICES

SOLICITATION NUMBER – F10B3400005

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Proposal Conference in *Conference Room L-3 of the Department of Budget and Management (DBM) located at 201 W. Preston Street, Baltimore, Maryland 21201, on August 28, 2013.* An Attendance List is included with this summary as Attachment 1. Attending on behalf of the State were Andrea R. Lockett, the Procurement Officer, and Panel Members:

Jennifer Schmidt ~ Director of Operations, Employee Benefits Division
Malynda Tyler ~ Finance Compliance Auditor, Employee Benefits Division
Robert Logue ~ Segal Company [Consultant]
Susan Kappel ~ Managed Care Advisors [Consultant]
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 Consultant (Segal Company and Managed Care Advisors) 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 specification writing in the future);
- Key Information Summary Sheet (reviewed proposal submission location; reviewed proposal submission closing date & time); **NOTE: The correct MBE Subcontracting goal for Functional Area 3 (DPPO-SF) is 5%, NOT 0.5%. The % is correct elsewhere in the RFP, however an amendment will be released to reflect the correction to this page.**

~Effective Resource Management~

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- Section 1 – General Information (reviewed summary statement, contract type, contract commencement and duration, procurement officer/contract manager, eMaryland Marketplace registration, submission of questions, closing date & time of proposals submission, multiple/alternate proposals, Public Information Act Notice, award basis and # of awards, revisions to RFP, Bid/Proposal Affidavit [Attachment B], Contract Affidavit [Attachment C], Department of Assessments and Taxation registration, Prompt Pay to Subcontractors, Electronic Procurements Authorized, Living Wage requirements, Non-Disclosure Agreement, HIPAA Business Associate Agreement, Conflict Minerals Notice, Investment Activities in Iran, Location of the Performance of Services Disclosure, Performance Guarantees and Liquidated Damages and NAIC 120-1 Model COB Contract Provisions; including a review of the Contract [Attachment A], Bid/Proposal Affidavit [Attachment B], Contract Affidavit [Attachment C], and Non-Disclosure Agreement [Attachment J].
- Section 4 – Proposals Submission Requirements (reviewed content of proposals submission; emphasized this information must be submitted sealed separately, but simultaneously with the Technical Proposal);
- Section 5 – Evaluation Criteria and Selection Procedure (reviewed technical evaluation criteria, financial criteria, selection process sequence and selection procedures);
- Attachment A – Contract (pointed out that RFP, contract and contractor proposals submission (including cure and clarification responses) represent State expectations and requirements and that all referenced exhibits are included in the contract by reference; further explained commercial nondiscrimination, prompt payment and liquidated damages requirements);
- Attachment B – Bid/Proposal Affidavit (explained that all blanks must be filled in even if not applicable; emphasized that affidavit must be submitted with technical proposal);
- Attachment C – Contract Affidavit (emphasized that affidavit is reaffirmation of bid/proposal affidavit; 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; submission required only if recommended for award);
- Attachment J – Non-Disclosure Agreement (explained signed copy must be received by Procurement Officer to obtain access to certain data necessary to complete the proposal response).

Jennifer Schmidt provided a high-level overview of the scope of work in the RFP:

- Section 3 – Scope of Work

Susan Kappel provided a high-level overview of the Technical Proposals:

- Technical Proposals, Attachment T [per Functional Area]

Robert Logue provided a high-level overview of the Financial Proposals:

- Financial Proposals, Attachment F [per Functional Area]

Mr. Thomas McLamore reviewed the Minority Business Enterprise and Veteran-Owned Small Business Enterprise Sections and Forms:

- Attachment D – Minority Business Enterprise Participation (explained that the MBE forms had been revised and that only submission of Attachment D-1 (Certified MBE Utilization and Fair Solicitation Affidavit) completed in its entirety for each Functional Area being proposed, to include the MBE Participation Schedule (which is now part of the affidavit) is required; also reviewed the **MBE subcontracting goals [per Functional Area]** 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).
- Attachment M - Veteran-Owned Small Business Enterprise Participation (explained that submission of Attachment M-1 (Utilization Affidavit and Subcontractor Participation Schedule) completed in its entirety for each Functional Area being proposed is required; **also reviewed the VSBE subcontracting goals [per Functional Area]**; also reiterated that the proposed VSBE must be verified by the Center for Veterans Enterprise of the United States Department of Veterans Affairs and provided the weblink.

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 that **no answer provided today to a question may in and of itself change any requirement of the solicitation**. They are being provided to help give a better understanding of the State's requirements. If, based upon a submitted question it is determined that any portion of the solicitation should be changed, the actual change may only be implemented via a formal amendment to the solicitation. Ms. Lockett further stated that any question asked and answered at the conference should be asked formally in writing by e-mail if the questioner wanted a coordinated, official response.

Date Issued: August 30, 2013

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
Rich Schon CareFirst	m.richard.schon@carefirst.com			No
Paul Chopper Senior Account Manager CareFirst	paul.chopper@carefirst.com	(410) 998-7587 <i>office</i> (410) 591-8276 <i>cell</i>	10455 Mill Run Circle Owings Mills, MD 21117	No
Carlton Ingram Aetna	ingramc@aetna.com			No
Robin Miller Portfolio Manager Specialty Products CareFirst	Robin.miller@carefirst.com	(410) 998-7537 <i>office</i>	10453 Mill Run Circle Owings Mills, MD 21117	No
Sharon Hose Account Vice President UnitedHealthcare	Sharon_hose@uhc.com	(410) 796-6286 <i>office</i>	6095 Marshalee Drive Suite 200 Elkridge, MD 21075	No
Robert D. Coover Director, Sales Delta Dental	Rcoover@delta.org	(800) 471-7091 x3509 <i>office</i> (717) 215-9282 <i>cell</i>	One Delta Drive Mechanicsburg, PA 17055	No
Sheila Stohler National Director Enterprise Accounts United Concordia	Sheila.stohler@ucci.com	(717) 260-6980 <i>office</i> (717) 805-3337 <i>cell</i>	1800 Linglestown Road, Suite 208 Harrisburg, PA 17110	No
Patrick Rohrbaugh Sales Account Executive Delta Dental	prohrbaugh@delta.org	(800) 471-7091 x3688 <i>office</i> (410) 652-2818 <i>cell</i>	One Delta Drive Mechanicsburg, PA 17055	No
Todd Kreider United Concordia	Todd.kreider@ucci.com			No
William R. Thygerson Underwriting Manager Dominion Dental Services, Inc.	wthygerson@dominiondental.com	(703) 212-3586 <i>office</i> (703) 595-3604 <i>cell</i>	115 South Union Street, Suite 300 Alexandria, VA 22314	No
Kimberly E. Stagg Director, Client Services MetLife	kstagg@metlife.com	(908) 253-6201 <i>office</i>	501 US Highway 22 Bridgewater, NJ 08807	No
Jason True Underwriting Manager Dominion Dental Services, Inc.	jtrue@dominiondental.com	(703) 212-3559 <i>office</i>	115 South Union Street, Suite 300 Alexandria, VA 22314	No
Beth W. Truffer Vice President Government & Education Segment Cigna	Beth.truffer@cigna.com	(410) 884-2594 <i>office</i> (443) 827-7722 <i>cell</i>	10490 Little Patuxent Parkway, Suite 400 Columbia, MD 21044	No
Derek S. Marsh Regional Dental Sales	Derek.marsh@cigna.com	(703) 269-1834 <i>office</i>	8484 Westpark Drive, Suite 950	No

Manager Cigna			McLean, VA 22102	
Alyson Drabick Cigna	Alyson.drabick@cigna.com			No
Al Sheets Senior Sales Account Executive Delta Dental	asheets@delta.org	(800) 471-7091 x3670 <i>office</i>	One Delta Drive Mechanicsburg, PA 17055	No
Margie Mazurek Curry Printing & Copy Center	Margie@curryprint.com	(410) 685-2679 <i>office</i> (410) 952-0280 <i>cell</i>	314 North Charles Street Baltimore, MD 21201	Yes