

**TASK ORDER REQUEST FOR PROPOSAL
BPM021914
MHBE External Audit Services
PRE-TOP Teleconference
December 17, 2020**

MHBE Pre-TOP Meeting Notes 12-17-2020 at 1 p.m.

Attendees:

Raelene Glasgow, Procurement Officer, MHBE
Caterina Pangilinan, Chief Compliance Officer/Chief Privacy Officer, MHBE
Eliot Burkom, Compliance Audit Manager, MHBE

Vendors:

Karen He and Charles Skinner – Hamilton Enterprises
Robert Diss and Aliesha Scarlett – Lindsey & Associates
Alexandra Greenley – UHY LLP
Valerie Colimon – RSM US LLP
J. Michael Stephens – Citrin Copperman
Monique Booker – SB & Company
Steve Freinberg and Andrew Wahl – BD & Company

Raelene Glasgow – General introduction of MHBE Staff
General introduction of attendees from various firms

Key Reminders:

- Questions may be submitted to me for further clarification until 3:00 pm, January 4, 2021.
- TORs are due January 5, 2021 at 1:00 pm; TORs sent after 1:00 pm will be rejected.
- MBE goal 10% and VSBE goal of 5% - Vendors are asked to ensure their forms are filled out correctly.
- Attachments that are to accompany the TOR must be submitted with all proposals; ensure they are filled out correctly.
- Vendors were asked to send their proposal electronically since MHBE staff is currently working from home because of COVID-19.
- Receipts will be sent to every vendor that submits a proposal letting them know their proposals were received and stating how many attached files were received via email.
- Vendors were asked to label their proposals and split them if a single file could not be sent due to its size.

Vendor Questions:

1. Requested Business Associate Agreement (BAA) clarification – Business Associate Agreement (BAA) is not required; the Non-Exchange Entity Agreement is required and must accompany the Proposal.
2. Are there any changes to the requirements of this audit? Nothing has changed except for the dates of the initial reports; the statistical sample size with a 95% confidence level and 10% confidence interval; and the two option years.
3. Will the financial report be made available to potential vendors? Vendors seeking information may submit a request for information under the Maryland Public Information Act. Requests can be sent to:
Betsy Plunkett, MA PMP
Director, Marketing and Web Strategies
Betsy.plunkett@maryland.gov
4. Are prior state fees available? Requests may be sent for such information under the Maryland Public Information Act to the contact in Question #3.

Meeting concluded at 1:30 pm.