



**DEPARTMENT OF
BUDGET & MANAGEMENT**

MARTIN O'MALLEY
Governor

ANTHONY BROWN
Lieutenant Governor

T. ELOISE FOSTER
Secretary

DAVID C. ROMANS
Deputy Secretary

***PRE-BID CONFERENCE SUMMARY
AUGUST 22, 2013***

**PROJECT TITLE:
CCU ACCOUNT VERIFICATION SERVICES**

SOLICITATION NUMBER – F10B4400003

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Bid Conference at the Department of Budget & Management, 45 Calvert Street, Conference Room 164, Annapolis, MD 21401. An Attendance List is included with this summary as Attachment 1. Attending on behalf of the State were: Ms. Rachel Hershey, Procurement Officer; Mr. Joel Leberknight, DBM Chief of Procurement; Mr. Jesse Lawyer, CCU Deputy Director; and Ms. Montez Foster, CCU Fiscal Service Administrator and Contract Monitor.

This Summary is being issued to document the Pre-Bid Conference. The Procurement Officer convened the conference around 11 a.m. and recognized the State personnel present as identified above.

Ms. Rachel Hershey then reviewed the following sections of the Invitation for Bids:

- Section 1 – General Information (reviewed contract type and duration, procurement officer/contract manager, submission of questions, closing date & time of bid submission, bid opening and recording, award basis, and revisions to the IFB);
- Section 2 – Minimum Qualifications of Bidders;
- Section 4 – Bid Submission Requirements (reviewed content of bids submission);
- Attachments – Contract, Bid/Proposal Affidavit, Bid Form Instructions and Bid Form, Maryland Living Wage Requirements for Service Contracts and Affidavit of Agreement; Conflict of Interest Affidavit and Disclosure, Non-Disclosure Agreement, and Certification of Investment Activities in Iran.

Mr. Jesse Lawyer explained in detail the scope of work in the IFB:

- Section 3 – Scope of Work.

~Effective Resource Management~

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Ms. Rachel Hershey reviewed questions that had been submitted in writing prior to the Pre-Bid Conference before opening the floor to questions. She advised that formal written answers would follow the oral answers. Questions asked at the Pre-Bid Conference would be answered in writing only if the question were submitted in writing. There were approximately 4 questions asked at the conference.

The attendees were reminded that responses given verbally and other general discussions did not change the provisions of the IFB and that the responses were provided to help give a better understanding of the State's requirements. The Conference was adjourned around 11:45 a.m.

Date Issued: August 21, 2013

By: <signed>

Rachel Hershey
Procurement Officer

Attachment 1:
Pre-Bid Conference Attendance List

Attachment 2:
Pre-Bid Agenda



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**PRE-BID CONFERENCE AGENDA
AUGUST 21, 2013 – 11:00 AM**

**PROJECT TITLE:
CCU ACCOUNT VERIFICATION SERVICES
SOLICITATION NUMBER – F10B4400003**

- I. Welcome and Introduction.....*Rachel Hershey, Procurement Officer*
 - a. Introduction of State Attendees
 - b. Pre-Bid Conference summary and sign-in sheet(s) will be emailed
- II. Review of IFB Sections 1 and 2.....*Rachel Hershey*
- III. Review of IFB Sections 3 (Scope of Work).....*Jesse Lawyer, CCU*
- IV. Review of IFB Section 4*Rachel Hershey*
- V. Review Attachment F – Financial Price Proposal Forms & Various Attachments.....*Rachel Hershey*
- VI. 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-Bid Conference will be not be transcribed. Although the State will provide a summary after the conference, any substantive question should be submitted to the Procurement Officer in writing, preferably via email.

We will attempt to answer every question, but our responses may be subject to clarification later. Moreover, the responses given verbally today by state representatives do not alter the IFB and are for informational purposes. Should substantive issues be raised which cause the solicitation to be amended, all bidders known to have received a copy of the solicitation will receive the amendment(s).

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