



*MARTIN O'MALLEY*  
Governor

*ANTHONY BROWN*  
Lieutenant Governor

*T. ELOISE FOSTER*  
Secretary

***PRE-BID CONFERENCE SUMMARY***  
***JUNE 12, 2014***

**PROJECT TITLE:**  
**CCU ACCOUNT VERIFICATION SERVICES**

**SOLICITATION NUMBER – F10B4400013**

Ladies/Gentlemen:

The State of Maryland conducted a Pre-Bid Conference on June 12, 2014, 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. 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 including the then forthcoming Amendment to the bid form issued later on June 12, Maryland Living Wage Requirements for Service Contracts and Affidavit of Agreement; Conflict of Interest Affidavit and Disclosure, and Non-Disclosure Agreement.

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

- Section 3 – Scope of Work.

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<http://www.dbm.maryland.gov> • [rachel.hershey@maryland.gov](mailto:rachel.hershey@maryland.gov)

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. Attendees asked several questions 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: June 17, 2014

By: <signed>

Rachel Hershey  
Procurement Officer

Attachment 1:  
Pre-Bid Conference Attendance List

Attachment 2:  
Pre-Bid Conference Agenda

**DBM CCU-Account Verification Services**  
**Pre-Bid Conference Sign-in Sheet— F10B4400013 – June 12, 2014**

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**Certified MD MBE** Yes No

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**Certified MD MBE** Yes No

**Certified MD MBE** Yes No

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**Certified MD MBE** Yes No

**Certified MD MBE** Yes No



**DEPARTMENT OF  
BUDGET & MANAGEMENT**

*MARTIN O'MALLEY*  
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*ANTHONY BROWN*  
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Secretary

**PRE-BID CONFERENCE AGENDA  
JUNE 11, 2014 – 11:00 AM**

**PROJECT TITLE:  
CCU ACCOUNT VERIFICATION SERVICES**

**SOLICITATION NUMBER – F10B4400013**

- 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 Deputy Director*
- IV. Review of IFB Section 4 .....*Rachel Hershey*
- V. Review Attachment F – Financial Price Proposal Forms, Amendment to Attachment F & 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 written summary after the conference. Any substantive questions should be submitted to the Procurement Officer in writing, preferably via email. Questions submitted in writing will receive a written response that will be issued to all vendors.

Answers provided to questions raised at the Pre-Bid Conference may be subject to clarification. No answers or other statements given at the Pre-Bid Conference can alter or amend the IFB; only a formal Amendment can change the substance of the IFB. In the event that substantive issues arise necessitating an amendment to the IFB, all bidders known to have received a copy of the solicitation will receive the amendment.

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