

## Contract Kick-Off Meeting Checklist

<Insert Date and Time>

<Insert Location><Insert Conference Number and Access Code, if applicable>

Topic	
Goal and Objective for the meeting	
Review of Agenda	
Introductions	
Agency Team and their roles (point of contact for Contractor)	
Communication Protocol	
Implementation Timeline <ul style="list-style-type: none"><li>a. Decisions or obstacles impacting timeline</li><li>b. Factors to be considered</li><li>c. Due dates for gathering &amp; definition of requirements (if applicable)</li><li>d. Impact on other agencies/divisions/units (if applicable)</li><li>e. Specific Contractor implementation tasks</li><li>f. Specific Agency implementation tasks</li></ul>	
Data Flow <ul style="list-style-type: none"><li>a. System of record for data</li><li>b. Determine data points and flow for end receipt</li></ul>	
Functionality and Informatics Considerations: (if applicable) <ul style="list-style-type: none"><li>a. Telephonic Enrollment</li><li>b. Web-Portals</li><li>c. Access to the Agency's offices and equipment</li></ul>	
Structure and frequency of future meetings <ul style="list-style-type: none"><li>a. Format</li><li>b. Duration</li><li>c. Onsite at Agency or remote</li></ul>	
<b>Financial and Performance Monitoring Considerations</b>	

If performance and payment bonds are required, be sure copies have been obtained and validity verified by confirming with surety underwriter prior to start of work.

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a.	Requirement for periodic evaluation reports of contractor performance and/or progress reports be furnished the purchasing office	
b.	That maintenance manuals, parts lists and as-built drawing have been obtained prior to authorization of final payment or as required by contract terms	
c.	A clear understanding of all contractor supplied warranties or bonding commitments	
d.	The need to advise the purchasing office if changes to the contract, follow-up maintenance or other services, etc., may be required	
e.	Acceptance and approval of the receipt of goods and services and documenting the contractor's invoices for approval of payment	
Be sure the user has encumbered funds to pay for services which overlap fiscal years.		
Provide a copy of the contract and any subsequent changes to accounts payable for invoicing/payment action verification.		
Establish and plot critical contract performance milestones required of contractor (e.g., checklist, progress reports or other written deliverables).		
Compile a tracking report on payments made against the contract.		
If the contract is renewed be sure that price and all other requirements are based upon conditions of the basic contract.		
If contractor's performance or delivery is unsatisfactory, issue a Procurement Complaint Form, Cure or Termination letter (as appropriate). Sample letters are included. Should action not yield satisfactory results or assistance is needed, contact your procurement agent.		