

Kickoff Meeting Agenda Items

Below is a discussion of items to consider that may be appropriate for a kick-off meeting agenda.

- **Introductions of key personnel:** The start-up conference should begin with introductions—identification of the project manager, the procurement officers, and any others that are present—with a description of each participant's particular roles in the management of the contract. It must be emphasized to client agency personnel that the project manager is the only conduit for communication between the client agency and the contractor in any matter material to the contract. It is important for the project manager to keep the procurement officers informed of all matters that are material to the contract to ensure that the appropriate documents are prepared, received, and approved so the contract file will be documented appropriately. Also important at the outset is the identification of the contractor's authorized manager on the project. In contracts where contractor personnel will be interacting on-site with client agency personnel, staff introductions on both sides are useful. During this meeting the QAP should be discussed. The QAP provides information on:
 - ◊ What tasks will be inspected
 - ◊ When tasks will be inspected
 - ◊ What monitoring methods will be used
 - ◊ How performance will be evaluated and assessed
 - ◊ How performance will be accepted
 - ◊ Who is responsible for each activity
- **Review of the contract:** The discussion ought to ensure that there is a clear understanding by all parties about the specifications and the terms and conditions. Client agency and contractor personnel who have not been previously involved in the project or procurement, along with those who have been involved and are on the contract administration team, must be encouraged to participate, since a misunderstanding at this point can be resolved easier than one that occurs during the life of the contract. The work schedule is always an important element of a project so the discussion should include possible conflicts where client agency or contractor personnel may get in each other's way. In contracts where there may be a sequence of work to be performed, the contractor should advise government representatives who will be doing what, and when.
- **Identification of expectations:** All persons at the meeting must discuss their expectations regarding the contract and project.
- **Site visit:** In the circumstance that the contractor will be performing some of the work on its premises, a topic for the start-up conference may be scheduling a visit to the contractor's site.
- **Payment procedures:** Payment procedures are important to both the contractor and the agency paying for its work. Most jurisdictions pay in a reasonable time after an invoice enters the payment channel. It is important for the parties at the conference to discuss payment procedures, particularly if the contractor is going to be paid based on performance and reaching certain benchmarks or milestones. If the contract calls for the contractor to be reimbursed for some of its costs, there needs to be an understanding about the amount of substantiation that the contractor must submit to support its pay requests.
- **Modifications to the contract:** An important topic to review is how contract changes and modifications will be handled during performance, and who will be authorized to direct the contractor to perform changed or additional work. It may be permissible for the project manager to make minor changes in contract work that have little or no effect on the overall price or performance of the contract, but it should be made clear that those must be forwarded to the central procurement office promptly for affirmation and the preparation of a proper contract amendment. Additionally, the central procurement office must advise that all other contract changes must be at the procurement officer's sole direction and confirmed through a signed amendment to the contract.

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- **Security issues:** The contractor may have materials and equipment on the government site. That property has to be stored and secured when the contractor's personnel are not present. These arrangements should be worked out at the start-up conference. Security may involve more than contractor supplies and equipment; the working papers of a professional or client services contract may require confidential status. Additionally, the contractor may have access to confidential information in the government's records, particularly if it is working on technology systems containing personally identifiable information. The method by which the contractor must handle that information needs to be made abundantly clear at the outset.
- **The role of the subcontractor:** The contract may involve subcontractors. The role of subcontractors should be discussed.
- **Contract administration procedures:** Finally, the start-up conference should address the details for contract administration. The parties ought to discuss the means and frequency of communication between the project manager and the procurement officer. Any instances in which the contractor may need to communicate directly with the procurement officer should be described. There should be a well-defined and understood process for resolving disputes as soon as they arise. The procurement officer should stress open and constant communication between the contractor's representative and the project manager to ensure that any little problems never grow up to be big ones.

Procurement