



TEXAS SOUTHERN UNIVERSITY

CONTRACT KICKOFF MEETING CHECKLIST

Date and Time:

Location:

Conference Number and Access Code:

Topic	Yes/No	
Goal and Objective for the meeting		
Review of Agenda		
Introductions		
TSU Team and their roles (point of contact for Contractor)		
Communication Protocol		
Implementation Timeline <ul style="list-style-type: none"> a. Decisions or obstacles impacting timeline b. Factors to be considered c. Due dates for gathering & definition of requirements (if applicable) d. Impact on other agencies/divisions/units (if applicable) e. Specific Contractor implementation tasks f. Specific TSU implementation tasks 		
Data Flow <ul style="list-style-type: none"> a. System of record for data b. Determine data points and flow for end receipt 		
Functionality and Informatics Considerations: (if applicable) <ul style="list-style-type: none"> a. Telephonic Enrollment b. Web-Portals c. Access to the TSU's offices and equipment 		
Structure and frequency of future meetings <ul style="list-style-type: none"> a. Format b. Duration c. Onsite at TSU or remote 		
Financial and Performance Monitoring Considerations		
	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.	
a.	Requirement for periodic evaluation reports of contractor performance and/or progress reports be furnished to 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	



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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 Vendor Performance Form, Cure or Termination letter (as appropriate). Sample letters are included. Should action not yield satisfactory results or assistance is needed, contact the Procurement Department.	