



CONTRACT MANAGEMENT CHECKLIST
(For Goods, Services, and Construction Contracts)

PROJECT INFORMATION	
Project #/Title:	Contract #:
Contractor Name:	Contract Value: \$
Contractor Contact Name:	Contract Start Date:
Contractor Contact Email/Phone:	Contract End Date:
City Contract Manager Name:	City/User Dept:

1. Contract Initiation & Kick-Off

- ☐ **Contract executed and distributed to relevant parties (Contractor, Project Manager, Contract Manager, Finance, Legal, End User Dept.)**
- ☐ **Contract Manager formally assigned/designated in writing.**
- ☐ **Internal kick-off meeting held with key municipal staff to review roles, responsibilities, deliverables, and timelines.**
- ☐ **External kick-off meeting scheduled and held with the Contractor to:**
 - ☐ **Review contract terms, conditions, scope of work, and deliverables.**
 - ☐ **Establish communication protocols and points of contact.**
 - ☐ **Discuss performance expectations, metrics, and reporting requirements.**
 - ☐ **Confirm invoicing procedures and payment schedules.**
 - ☐ **Review any specific Florida statutory or local ordinance requirements (e.g., public records, ethics).**
- ☐ **Contract Administration Plan (CAP) developed, especially for complex or high-risk contracts (outlining monitoring, risk management, communication, etc.).**
- ☐ **Verify all required insurance certificates (meeting types and limits specified in contract) are on file and current.**



- ☐ Verify all required bonds (performance, payment, etc.) are on file, current, and from acceptable sureties.
- ☐ Confirm vendor registration is complete and accurate in the municipal financial system.
- ☐ Set up contract file (digital and/or physical) per municipal record-keeping policies.
- ☐ Initial risk assessment reviewed and updated based on final contract terms.

2. Contract Administration & Monitoring

- ☐ Regular contract status meetings scheduled and held (internal and/or with contractor).
- ☐ Contractor performance monitored against contract terms, scope, schedule, and budget.
- ☐ Deliverables tracked and verified for quality and timeliness.
- ☐ Inspection and acceptance procedures followed for goods/services/milestones.
- ☐ Invoices reviewed for accuracy, completeness, and compliance with contract pricing and terms.
- ☐ Supporting documentation for invoices verified.
- ☐ Prompt payment processing in accordance with Florida Prompt Payment Act and contract terms.
- ☐ Budget adherence monitored; potential overruns identified and addressed proactively.
- ☐ Communication with contractor documented (meeting minutes, emails, official correspondence).
- ☐ Compliance with all applicable federal, state (Florida Statutes), and local laws/ordinances monitored (e.g., E-Verify, public records requests, Small/Minority Business utilization if applicable).



- ☐ Insurance certificates and bonds monitored for continued validity throughout the contract term; renewals obtained as needed.
- ☐ Site visits conducted (if applicable) and documented.
- ☐ User/departmental feedback on contractor performance solicited and documented.

3. Performance Management

- ☐ Performance metrics (Key Performance Indicators - KPIs) regularly reviewed and reported.
- ☐ Deviations from contract requirements or performance standards identified and documented.
- ☐ Corrective Action Requests (CARs) issued for deficiencies, with clear expectations and timelines for resolution.
- ☐ Monitor implementation and effectiveness of corrective actions.
- ☐ Dispute resolution procedures followed as outlined in the contract (escalate as needed).
- ☐ Incentives or disincentives applied based on contract provisions and performance.
- ☐ Formal performance evaluations/reviews conducted at planned intervals.
- ☐ Lessons learned documented for future contracts.

4. Contract Modifications & Amendments

- ☐ Need for change identified, justified, and documented (scope, time, cost).
- ☐ Review contract for change order/amendment procedures and limitations.
- ☐ Obtain internal approvals for proposed changes (Requesting Dept., Finance, Legal, Council/Board if required).
- ☐ Negotiate changes with the contractor in good faith.



- ☐ Formal contract amendment/modification drafted, reviewed by Legal, and executed by authorized signatories.
- ☐ Amendment/modification distributed to all relevant parties and filed in the contract file.
- ☐ Budget and payment systems updated to reflect approved changes.
- ☐ Verify impact of changes on insurance and bonding requirements.

5. Record Keeping & Documentation (Contract file contains the following, as applicable)

- ☐ Original solicitation documents and addenda.
- ☐ Winning bid/proposal.
- ☐ Signed contract and all amendments/modifications.
- ☐ Notices (e.g., Notice to Proceed, Intent to Award).
- ☐ All correspondence with the contractor.
- ☐ Insurance certificates and bonds.
- ☐ Kick-off meeting documentation.
- ☐ Deliverable acceptance forms/reports.
- ☐ Invoices and payment records.
- ☐ Performance monitoring reports and evaluations.
- ☐ Corrective action documentation.
- ☐ Change order/amendment documentation.
- ☐ Records of any disputes and resolutions.
- ☐ Closeout documentation.
- ☐ Compliance with Florida Public Records Law (Chapter 119, F.S.) for all contract-related documents.
- ☐ Ensure records retention schedule is followed.



- ☐ Financial records reconciled regularly.

6. Contract Closeout & Renewal/Re-Procurement

- ☐ Verify all contract deliverables have been completed and accepted
- ☐ Confirm all payments have been made and financial accounts reconciled (no outstanding claims or liens).
- ☐ Obtain final lien waivers or releases (especially for construction).
- ☐ Complete final performance evaluation of the contractor.
- ☐ Return any municipal property or information from the contractor.
- ☐ Ensure proper disposition of any contractor-held municipal data.
- ☐ Formal notice of contract completion/termination issued (if required).
- ☐ Contract closeout checklist completed and signed off.
- ☐ Contract file audited/reviewed for completeness and archived according to policy.
- ☐ Post-project review/lessons learned meeting held (internal).
- ☐ Decision made on whether to re-procure, renew (if options exist and are justified), or let expire.
- ☐ If renewing, ensure all conditions for renewal are met and proper approvals obtained.
- ☐ If re-procuring, initiate the solicitation process in a timely manner, incorporating lessons learned.
- ☐ Update relevant databases and logs with contract closeout information.