

Lessons Learned Checklist

INSTRUCTIONS

This checklist is a sample only, and it is not exhaustive. The questions covered in the checklist may help identify risks and associated losses to address in future solicitations. Use the checklist to outline lessons learned from the contract and contractor's performance.

Goods/Services

- Did the contractor experience problems delivering goods or services?
 - What were the problems?
 - Why did those problems exist?
 - Was any part of the problem attributable to the Agency (delayed approvals)?

- Were any goods returned as damaged?
 - What were the problems?
 - Why did those problems exist?

- Were any services non-conforming?
 - What were the problems?
 - Why did those problems exist?
 - Was any part of the problem attributable to the Agency (delayed approvals)?

- Did the Agency exercise any options for lack of contractor performance (Cure Notice or Corrective Action Plan)?
- Did the agency measure performance?
 - Goods: think of things like, define complete delivery, partial delivery, "defective goods," etc.
 - Services: think of things like, number of visits, number of people served, software functions for a time period without failing, reports delivered, etc.
- Did the measurements help avoid performance issues?
 - If not, what would have worked to avoid performance issues?

Compliance

- Did the contractor provide the required insurance, licenses, certifications, safety inspections before delivery, etc.?
- Did the contractor maintain required professional designations etc. in the delivery of goods or services?
- Was the contractor in compliance with regulations, laws or policies associated with this purchase?
- Was the Agency able to verify compliance?

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Invoicing and Payment

- Did the contractor invoice according to contract provisions?
- Did the invoices match the contracted price and method of calculation?

Additional Factors

If the Agency is considering re-issuing a solicitation for the work:

- List any changes to the requirements here.
- List any changes to the contract terms and conditions that would ensure appropriate contractor performance.
- Provide the answers to all of these questions to your Agency's Contract Professional for review before the issuance of any solicitation for the work.