Kickoff Meeting Agenda Checklist (Client Attending)

Purpose

The purpose of the Pre-Job meeting is to ensure that the Project Team and stakeholders are aware and aligned with the Contractor’s contractual responsibilities, the Project Execution Plan, the project lines of communication and project roles and responsibilities. This checklist addresses topics identified in the In-House Pre-Job Meeting agenda template.

Project Kick-Off Meeting Checklist (Client Attending)

1.0 Project Objectives
   • Review the project objectives

2.0 Scope of Work
   • General review of the project scope of work. The scope will be reviewed in more detail in the Project Execution Plan section.

3.0 Contract
   • Confirm the Project Team has received all current project documents including:
     o Terms and Conditions
     o Drawings and Specifications
   • Confirm remaining steps to finalize contract
   • Commercial terms
     o Identify any areas of specific concern such force account
     o Confirm remaining steps to finalize contract
     o Progress Invoicing: confirm dates for submittal, approval and payment
   • Insurance
     o Confirm insurance certificates and bonds are in place
     o Confirm required permits are in place
   • Specific Contract Causes of Concern
     o Delays
     o Notice
     o Changes to work
     o Owner Supplies materials and services
     o Reporting requirements
     o Clarify unusual contract condition
     o Other

4.0 Project Organization
• Review owner’s Project Organization Chart including engineering, safety, and quality
• Review the Project Team’s Organization Chart
• Confirm who will sign for approvals on the Project Team’s and/or owners forms such as time tickets, change orders, safety, QC, etc.
• Project team’s individual duties and responsibilities
• Major subcontractors, their key contracts and scope of work

5.0 Project Execution Plan
• Review the key points of the execution plan including:
  o **Scope**: discuss the key elements of the project, especially critical items that will be key to the project’s success
  o **Safety**: safety is discussed in detail later in the meeting
  o **Schedule**: key project dates including start, substantial completion, final completion, and project plan to achieve schedule deliverables
  o **Construction Plant**: the construction plan is discussed in detail later in the meeting
  o **Resources**: general discussion regarding labour and equipment resources requirements, materials and subcontract requirements
  o **Support services**: general discussion regarding services and support provided by the divisional and corporate service groups – including accounting, job costing recruitment, quality control, Information Systems, etc.

6.0 Engineering
• Status of IFC drawings and specifications
• Status of Bid to construction estimate
• Review technical details to confirm the Project Team has a clear understanding of what is expected

7.0 Safety
• Confirm prime contractor status
• Discuss in as much detail as appropriate the Project Site Safety plan
• Confirm the Safety reporting requirements

8.0 Construction
• Labour
  o **Work Schedule**
  o **Planned overtime**
  o **Subsistence requirements**
  o **Travel requirements**
  o **Other**
• Equipment
Specific equipment planned to be used

- Material Purchasing
  - Who and where will purchasing be done
  - Coordination between site and home office
  - Types of materials to be purchased by the Project Team
  - Source of purchased materials

- Subcontractors
  - Identify specific Subcontractors that are to be used
  - Identify subcontracts yet to be issued

- Project Overhead
  - Review site layout plan
  - Location of job trailer, warehouse, lunchroom and tool cribs
  - Source of power and telephone

9.0 Project Cost and Schedule Controls

- Cost Control Plan
- Progress Measurement Plan
- Schedule Control Plan

10.0 Quality Control

- Review Project Inspection and Test Plan (ITP)
- Applicable codes specified in the Contract documents
- Review the Project Team’s plan for Quality Assurance
- Planned resources for the project’s QC program
- Project Completion, Commissioning and Turnover

11.0 Change Management

- Confirm notice requirements
- Review written authorization and approval process
- Confirm dispute resolution process
- Required documentation for change management

12.0 Reporting Requirements

- Confirm client requirements
- Confirm timing and frequency of required reports
- Confirm who on project team is responsible for each report

13.0 Subcontract Management

- Review who is responsible for issuing and managing subcontracts
- Subcontract change management process

14.0 Progressive Payments
• Review client’s approval procedures
• Confirm all project team members are clear as to their responsibilities and duties pertaining the invoicing process

15.0 Aboriginal and Community Relations
• Confirm contract requirements
• Review the Project Team’s plan to meet contract obligations

16.0 Project Specific Policies and Procedures
• Confirm what they are and who is responsible to ensure compliance
Kickoff Meeting Agenda

Project: ____________________________
Meeting Date: ______________________

<table>
<thead>
<tr>
<th>Agenda</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0 Introductions</td>
<td></td>
</tr>
<tr>
<td>2.0 Project Objectives</td>
<td></td>
</tr>
<tr>
<td>3.0 Scope of Work</td>
<td></td>
</tr>
<tr>
<td>4.0 Contract</td>
<td></td>
</tr>
<tr>
<td>5.0 Project Organization</td>
<td></td>
</tr>
<tr>
<td>6.0 Project Execution Plan</td>
<td></td>
</tr>
<tr>
<td>7.0 Engineering</td>
<td></td>
</tr>
<tr>
<td>8.0 Safety</td>
<td></td>
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<tr>
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<td></td>
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<tr>
<td>10.0 Project Cost and Schedule Controls</td>
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<tr>
<td>11.0 Quality Control</td>
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<tr>
<td>12.0 Change Management</td>
<td></td>
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<tr>
<td>13.0 Reporting Requirements</td>
<td></td>
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<tr>
<td>14.0 Subcontract Management</td>
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<tr>
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<tr>
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Minutes Prepared by: ______________________
Approved: ______________________
Date: ______________________
Attachments: ______________________