QUARTERLY CONTRACTOR PREPARATION 

**Category Specialists can use this as a guide to plan and conduct Quarterly Contractor Reviews. The first page is designed to help plan the review and adequately gather relevant agenda items.**

**Complete and distribute the second page only for meeting attendees.**

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| **PRE-PLANNING** | |
| **Invitees:** | *On the University side, consider who serves as primary stakeholders and significant users for the contract goods or services. Ensure adequate representation across all applicable areas and sectors. These may be persons who served on the original RFP committee or others as deemed appropriate by the Category Specialist.   On the Contractor side, invite the relevant account representative(s).* |
| **Topic Preparation:** | *Research and compile topics that need discussed. Survey the attendees in advance for items of interest which may include contract compliance, pricing concerns, or contractor performance. Are there new products or services they need to add to the contract? What topics were carried over from a previous quarterly review meeting? Are there metrics that can be provided by the Contractor that may be of interest to the committee?  Gather data:  How much spend was conducted during the previous quarter and are there trends of concern? Is the contractor up-to-date on reporting University sales and Tier 2 diversity reporting? Rebates or value-add components: Is the contractor current on all obligations to the University?* |
| **Scheduling:** | *Plan and send meeting invitations in advance for the next several quarters to reserve space on attendees’ calendars.  With the approach of each meeting, send an email reminder to attendees. You can also share potential agenda items in advance so invitees are informed and prepared to participate.  Schedule the online meeting and/or reserve location as needed.  If there are numerous topics, or if there are performance issues that may need addressed, consider a pre-meeting with the University attendees only to discuss so it can be managed as needed during the formal review meeting with the contractor.*  *If you need support in any way, consult your manager for input and feedback.* |

QUARTERLY CONTRACTOR AGENDA 

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| --- | --- | --- |
| **CONTRACTOR NAME:** |  | |
| **CONTRACT NAME:** |  | |
| **CATEGORY SPECIALIST:** | |  |

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| --- | --- | --- | --- | --- | --- |
| **MEETING INFORMATION** | | | | | |
| **Date:** |  | **Start Time:** |  | **Duration:** |  |
| **Location:** |  | | | | |
| **University Attendees:** |  | | | | |
| **Contractor Attendees:** |  | | | | |
| **MEETING AGENDA** | | | | | |
| **Topics: From Previous Meeting** | **Notes** | | | | |
|  |  | | | | |
| **Topics: New** | **Notes** | | | | |
|  |  | | | | |
| **Topics: Next Meeting** | **Notes** | | | | |
|  |  | | | | |
| **NEXT PLANNED MEETING DATE:** | | | | | |
| **Date:** |  | **Start Time:** |  | **Duration:** |  |

Quarterly Contractor Review University of Kentucky Purchasing Division