

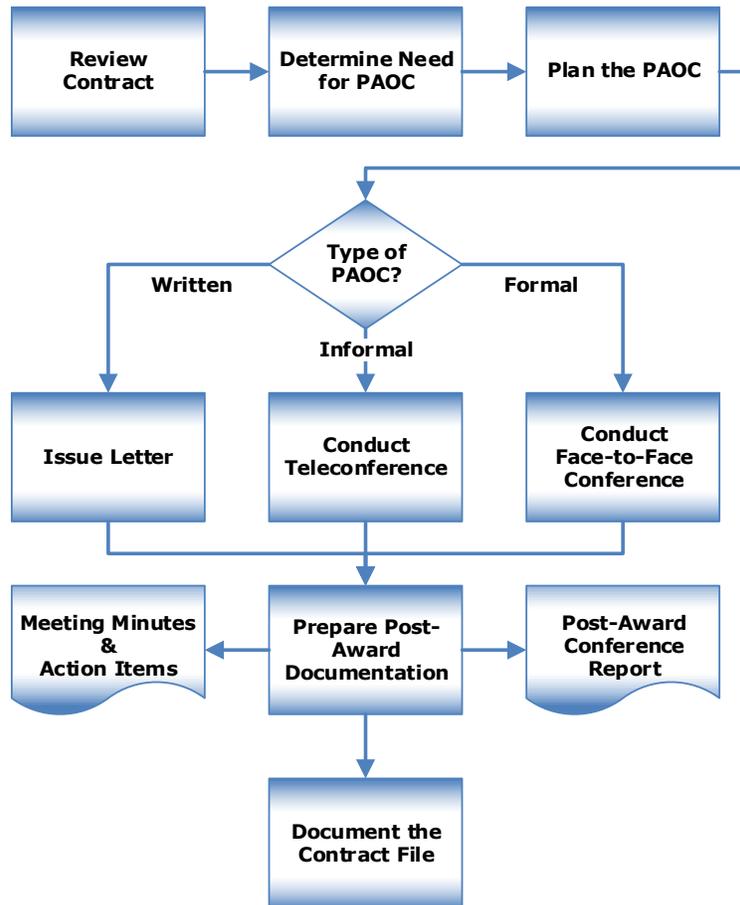
CMC100 Job Aid

Post-Award Orientation Conference

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I. Post-Award Orientation Process



Step	Description
Review Contract	Review the contract for factors that suggest a PAOC is necessary.
Determine the Need for PAOC	Although the Administrative Contracting Officer (ACO) or Procuring Contracting Officer (PCO) will make the final decision, functional specialists make recommendations to the ACO.
Plan the PAOC	<p>The ACO is responsible for planning the PAOC. Planning includes tasks such as:</p> <ul style="list-style-type: none"> • Determine the time and location • Prepare the agenda • Notify Government representatives • Notify the contractor • Act as the chairperson • Conduct a preliminary meeting of Government personnel <p>Maximum benefits will be realized when orientation is conducted promptly after award. You should use DD Form 1484, Post-Award Conference Record, as a checklist to help plan the post-award orientation.</p>

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 Post-Award Orientation Conference

Step	Description
Type of PAOC?	Based on the complexity and other factors, determine the level of PAOC required: <ul style="list-style-type: none"> • Formal (Face-to-Face) • Limited (Letter) • Limited (Teleconference) Do not base the type of PAOC on the cost of the PAOC. It should be based on the level of risk associated with the contract.
Issue Letter	A letter should be on Government letterhead and should identify the Government representative responsible for administering the contract. Explain any unusual or significant contract requirements.
Conduct Teleconference	A phone call or teleconference can aid in establishing a personal working relationship with the contractor. If a teleconference is chosen, a document the conversation and provide a copy to the contractor. Place a copy in the official administrative contract file.
Conduct Face-to-Face Conference	In addition to planning a face-to-face conference, the ACO is responsible for acting as the chairperson and preparing the post-award conference report.
Prepare Post-Award Documentation	As the chairperson of the PAOC, the ACO is responsible for preparing the post-award conference report. The ACO may designate a Contract Specialist to take notes, prepare minutes, document action items, and draft an initial version of the report.
Meeting Minutes & Action Items	<p>Minutes of the meeting should include a list of all attendees and a summary of all discussion points and decisions. These will be distributed to all attendees and any other stakeholders not in attendance. The contractor's point of contact should formally acknowledge concurrence with the content of the minutes.</p> <p>A list of all action items stemming from the meeting will also be distributed. The list of action items should include the action, the responsible individual, and a suspense date.</p>
Post-Award Conference Report	DFARS 242.503-2 recommends using DD Form 1484, Post-Award Conference Record, when conducting the conference and in preparing the conference report.
Document the Contract File	The CRR e-Tool conveniently generates post-award orientation documentation that may be imported into the Electronic Document Access (EDA) system.

II. Post-Award Orientation Types

Type	Selection Factors
Face-to-Face Conference	<ul style="list-style-type: none">• High-value, high-complexity contract• Reasonable expectation of multiple problems of varying severity• Contractor may not have a clear understanding of the Government expectations• Discussion issues are complex
Phone Calls and Teleconferences	<ul style="list-style-type: none">• Few problems are anticipated• Contractor has established a good past performance history with similar products or services• Discussion issues are relatively straight forward
Letter	<ul style="list-style-type: none">• No problems are anticipated• Contractor has established a good past performance history in producing the same products or services.• Discussion issues are simple

III. Questions to Determine Need for PAOC

Category	Question	Need PAOC if Answer is:
Customer Experience	Does the contractor have little or no previous experience with this Government customer?	YES
Product Experience	Does the contractor have little or no previous experience with this type of product or service?	YES
Past Performance	Does the contractor have a record of an unusual number of problems on previous Government contracts?	YES
Urgency/Criticality	Does the contract have an urgent delivery schedule or provide products or services to critical programs?	YES
Administration	Does the contract type require a high degree of administration?	YES

IV. FAR 42.502 PAOC Factors

FAR 42.502 Number	Factor
(a)	Nature and extent of the pre-award survey and any other prior discussions with the contractor
(b)	Type, value, and complexity of the contract
(c)	Complexity and acquisition history of the product or service
(d)	Requirements for spare parts and related equipment
(e)	Urgency of the delivery schedule and relationship of the product or service to critical programs
(f)	Length of the planned production cycle
(g)	Extent of subcontracting
(h)	Contractor's performance history and experience with the product or service
(i)	Contractor's status, if any, as a small business, small disadvantaged, women-owned, veteran-owned, HUBZone, or service-disabled veteran-owned small business concern
(j)	Contractor's performance history with small, small disadvantaged, women-owned, veteran-owned, HUBZone, and service-disabled veteran-owned small business subcontracting programs
(k)	Safety precautions required for hazardous materials or operations
(l)	Complex financing arrangements, such as progress payments, advance payments, or guaranteed loans