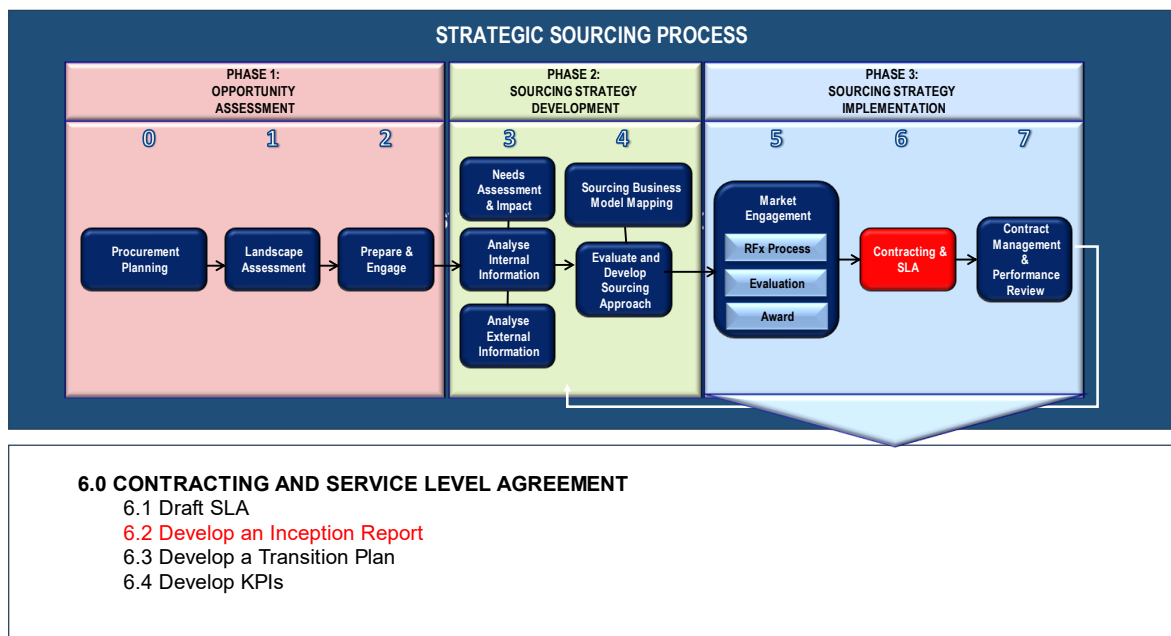


Using this guide

This guide accompanies the National Treasury's Strategic Procurement Framework (SPF) for Strategic Sourcing in the Public Sector. For more information, visit the National Treasury website at <http://ocpo.treasury.gov.za/>

The SPF can be found here:

http://ocpo.treasury.gov.za/Resource_Centre/Documents/1A.%20Strategic%20Procurement%20Framework.pdf

DEVELOP AN INCEPTION MEETING**1.0 Introduction**

- i. An inception meeting is the first meeting when starting a project.
- ii. The project team members from both organisations, the procuring institution and the service provider attend the meeting to discuss the project, its goals and the expectations of the project.
- iii. The successful implementation of the contract depends on the parties to the contract achieving a common understanding, or “meeting of the minds”. That is why the inception report is important.

- iv. The following good practice guide and template apply to the development of the inception report:
 - a. Inception report
 - b. Inception report (template)

1.1 The objective

- i. To set up the post-contract signing activities which include agreeing with the service provider on the contract deliverables and expectations.

1.2 Output

- i. Inception report

2.0 Good practice guides

2.1 Inception meeting

- i. If properly implemented, an inception meeting is an important mechanism for ensuring successful project implementation.
- ii. Although not all contracts with suppliers will require an inception meeting, the more strategic the project, the greater the need to have the inception meeting.
- iii. All the project co-team members are expected to participate in the inception meeting.
- iv. The inception meeting must be conducted after the contract has been fully signed.

2.2 What should be included in an inception report

- i. The inception report must contain the following;
 - a. The inception report objectives
 - b. The project objectives
 - c. The scope of work as per the Terms of reference (TOR)
 - d. The project deliverables and milestones
 - e. Inception activities
 - f. Approach and methodology for executing the project
 - g. The project milestones
 - h. The implementation plan
 - i. The risk management mechanism

- j. The project organisation and how the responsibilities and roles will be managed
- k. Project monitoring and reporting
- l. Approvals

3.0 Template

3.1 Inception report

Table of Contents

1	Abbreviation	2
2	Inception report objective	2
3	Project Objective.....	2
3.1	Purpose.....	2
3.2	Key Result Areas.....	2
4	Scope of work	2
4.1	Project Description	2
5	Project deliverables.....	2
6	Inception activities	2
7	Approach and methodology	2
8	Project milestones.....	3
9	The implementation plan	3
10	The risk management mechanism	3
11	The project organisation	3
11.1	Responsibilities and Roles.....	3
12	Project monitoring and reporting	3
13	Approvals	3

1 Abbreviations

List of Abbreviations	
Abbreviation	Name / Description

2 Inception report objective

The objective of this inception report is to:

3 Project objective

The objective of this project is...

3.1 Purpose

The purpose of this project is...

3.2 Key Result Areas

Paragraph text

4 Scope of work

Paragraph text

4.1 Project Description

Paragraph text

5 Project deliverables

Paragraph text

6 Inception activities

Paragraph text

7 Approach and methodology

Paragraph text

8 Project milestones

Paragraph text

9 The implementation plan

Paragraph text

10 The risk management mechanism

Paragraph text

11 The project organisation

11.1 Responsibilities and roles

Paragraph text

12 Project monitoring and reporting

Paragraph text

13 Approvals

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Compiled by:

Recommended/Not Recommended

Approved/Not approved

Date:
