

# Contractor Management Quick Guide

## Process & Tools



STAGE 1 Define the work	STAGE 2 Commercial engagement	STAGE 3 Onboarding	STAGE 4 Manage and monitor work	STAGE 5 Review and close out
<p>1.1 Understand needs</p> <p>1.2 Identify risks and hazards</p> <p>1.3 Develop job and/or contract scope</p> <p>1.4 Decide appropriate procurement method</p>	<p>2.1 Shortlist contractors</p> <p>2.2 Contractor evaluation of scope</p> <p>2.3 Tender/quote evaluation</p> <p>2.4 Appoint contractor</p>	<p>3.1 Review and approve work pack</p> <p>3.2 Inductions and training</p> <p>3.3 Planning and permits</p> <p>3.4 Mobilisation</p>	<p>4.1 Prestart</p> <p>4.2 Workplace interaction</p> <p>4.3 Scope variation and delays</p> <p>4.4 Reporting</p> <p>4.5 Invoicing</p>	<p>5.1 Confirm completion of deliverables</p> <p>5.2 Demobilisation</p> <p>5.3 Contract performance evaluation and close out</p>

Contractor is equivalent to Contingent Worker

*These four key practices add the greatest value to the end-to-end contractor management process.*

**KEY PRACTICE 1:**  
Clear and aligned scope of work



**KEY PRACTICE 2:**  
Set up to work



**KEY PRACTICE 3:**  
Workplace interactions



**KEY PRACTICE 4:**  
Review and close out



### TOOLS:

[B/D/21/532](#) S2311 – Scope of Work Development Tool\*

[B/D/21/525](#) S2312 – Contract Summary

[B/D/13/35179](#) S2167 – Contractor Onboarding Checklist\*

[B/D/21/515](#) S2314 – HSE System Audit

[B/D/21/481](#) S2315 – Punch List Template

[B/D/12/43778](#) PF238 Scope of Work Template\*

[B/D/21/522](#) S2313 – Contract Implementation Meeting Agenda

[B/D/21/1628](#) CAL – Site Familiarisation

[B/D/21/480](#) KOG – Site Familiarisation

[B/D/12/19149](#) S2168 – Contractor Closeout Checklist\*

*(Note: it is mandatory to use at least one CSE scoping tool/template)*

[Create a vendor – CS Energy Intranet](#)

Tools are optional unless indicated as mandatory (\*)

# Contractor Management Quick Guide

## Roles & Responsibilities



STAGE 1 Define the work	STAGE 2 Commercial engagement	STAGE 3 Onboarding	STAGE 4 Manage and monitor work	STAGE 5 Review and close out
<p><b>Designated Lead</b></p> <ul style="list-style-type: none"> <li>Confirm Client has approved for work to proceed (e.g. SAP notification has been checked, internal order number generated for projects)</li> <li>Understand the requested work, including the root cause and contributing factors, and review any previous root cause analysis if available</li> <li>Understand the benefits to the business of completing the requested work</li> <li>Consult with relevant stakeholders as required, including the Client</li> <li>Where it has been identified that a change to the plan is required, the Plant Modifications Procedure will be followed and deliverables are to be included in the scope of work</li> </ul> <p><b>Procurement Professional</b></p> <ul style="list-style-type: none"> <li>Liaise with Designated Lead on procurement options</li> </ul> <p><b>Client</b></p> <ul style="list-style-type: none"> <li>Provide information to Designated Lead during scope development</li> <li>Decide on option that provides best business value</li> </ul>	<p><b>Designated Lead</b></p> <ul style="list-style-type: none"> <li>Identify existing or potential contractors</li> <li>Evaluate technical capability of contractors</li> <li>Manage technical content enquiries from Contractor</li> <li>Select winning quote</li> </ul> <p><b>Client</b></p> <ul style="list-style-type: none"> <li>Assist Designated Lead to identify potential contractors</li> </ul> <p><b>Procurement Professional</b></p> <ul style="list-style-type: none"> <li>Commercial pre-qualification</li> <li>Manage site visit process</li> <li>Select winning tender</li> <li>Implementation meeting for new contracts</li> </ul> <p><b>Contract Owner</b></p> <ul style="list-style-type: none"> <li>Approve contract</li> <li>Ensure Purchase Order raised prior to start date</li> </ul> <p><b>HSE Professional</b></p> <ul style="list-style-type: none"> <li>Establish HSE criteria</li> <li>HSE pre-qualification</li> </ul>	<p><b>Designated Lead</b></p> <ul style="list-style-type: none"> <li>Verify qualifications and competencies</li> <li>Approve work pack</li> <li>Organise VOCs where CSE plant will be operated</li> <li>Ensure work is planned and permits arranged</li> <li>Work party onboarding and site familiarisation</li> <li>Verify mobile plant and equipment brought onto site</li> </ul> <p><b>Contractor Management Coordinator</b></p> <ul style="list-style-type: none"> <li>Verify CS Energy Scope document &amp; approved PO is in place before access is granted</li> <li>Assist Designated Lead with Onboarding requirements/verifications where necessary</li> <li>Ensure consistent execution of systematic processes across sites (Callide/Kogan) &amp; teams (Project/General Plant)</li> </ul> <p><b>HSE Professional</b></p> <ul style="list-style-type: none"> <li>Review HSE information in work pack</li> </ul>	<p><b>Designated Lead</b></p> <ul style="list-style-type: none"> <li>Lead pre-start meetings</li> <li>Undertake workplace interactions</li> <li>Raise corrective actions</li> <li>Manage scope variations and delays</li> <li>Reporting against schedule, budget and KPIs (including HSE)</li> <li>Ensure complete and timely investigation of contractor incidents</li> <li>Verify and arrange payment of invoices</li> </ul> <p><b>Contractor Management Coordinator</b></p> <ul style="list-style-type: none"> <li>Conduct CCV's &amp; Safety Interactions with Contractor work parties on site</li> </ul> <p><b>Contract Owner</b></p> <ul style="list-style-type: none"> <li>Undertake workplace interactions</li> <li>Involvement in scope variations</li> </ul> <p><b>HSE Professional</b></p> <ul style="list-style-type: none"> <li>Complete periodic reviews of HSE pre-qualification requirements</li> </ul>	<p><b>Designated Lead</b></p> <ul style="list-style-type: none"> <li>Final inspection of work</li> <li>Generate punch list items</li> <li>Evaluate documents submitted by contractor</li> <li>Maintain relevant records</li> <li>Develop defects list</li> <li>Ensure safe and effective mobilisation</li> <li>Review contractor performance</li> <li>Submit contractor evaluation to vendor management system</li> <li>Assist in contract closure</li> </ul> <p><b>Contractor Management Coordinator</b></p> <ul style="list-style-type: none"> <li>Communicate out to all Vendors, changes in Site Requirements &amp; Red/Green Banner announcements</li> <li>Collaborate with Contract Owner &amp; HSE Professional on Contractor Performance and help facilitate meetings</li> </ul> <p><b>Contract Owner</b></p> <ul style="list-style-type: none"> <li>Review contractor performance</li> <li>Contract closure activities</li> </ul> <p><b>Procurement Professional</b></p> <ul style="list-style-type: none"> <li>Assist in contractor performance reviews</li> <li>Assist in contract closeout</li> </ul>

The **Contractor Management Coordinator** is the site champion to ensure effective end to end Contractor Management processes on site.

The **Designated Lead** has overall accountability for development, execution and close out of the job scope of work.

The **Procurement Professional** is a Procurement team member who provides support throughout the contractor management process.

The **Client** is the person who initiates the work.

The **HSE Professional** is a member of the Health and Safety or Environment team who provides functional support throughout the contractor management process.

The **Contract Owner** has overall accountability for the contract and is the key point of contact in relation to the contract.

The **Head of Operations Performance** is the owner of this Procedure and the related contractor management tools.