

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>

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/12/19149](#) S2168 – Contractor Closeout Checklist

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

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



Tools are optional unless indicated as mandatory (*)

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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>Designated Lead</p> <ul style="list-style-type: none"> Understand Client needs Identify key risks and hazards Develop scope of work Liaise with Procurement on procurement options <p>Procurement Professional</p> <ul style="list-style-type: none"> Liaise with Designated Lead on procurement options <p>Client</p> <ul style="list-style-type: none"> Provide information to Designated Lead during scope development Decide on option that provides best business value 	<p>Designated Lead</p> <ul style="list-style-type: none"> Identify existing or potential contractors Evaluate technical capability of contractors Manage technical content enquiries from Contractor Select winning quote <p>Client</p> <ul style="list-style-type: none"> Assist Designated Lead to identify potential contractors <p>Procurement Professional</p> <ul style="list-style-type: none"> Commercial pre-qualification Manage site visit process Select winning tender Implementation meeting for new contracts <p>Contract Owner</p> <ul style="list-style-type: none"> Approve contract Ensure Purchase Order raised prior to start date <p>HSE Professional</p> <ul style="list-style-type: none"> Establish HSE criteria HSE pre-qualification 	<p>Designated Lead</p> <ul style="list-style-type: none"> Verify qualifications and competencies Approve work pack Organise VOCs where CSE plant will be operated Ensure work is planned and permits arranged Work party onboarding and site familiarisation Verify mobile plant and equipment brought onto site <p>HSE Professional</p> <ul style="list-style-type: none"> Review HSE information in work pack 	<p>Designated Lead</p> <ul style="list-style-type: none"> Lead pre-start meetings Undertake workplace interactions Raise corrective actions Manage scope variations and delays Reporting against schedule, budget and KPIs (including HSE) Ensure complete and timely investigation of contractor incidents Verify and arrange payment of invoices <p>Contract Owner</p> <ul style="list-style-type: none"> Undertake workplace interactions Involvement in scope variations <p>HSE Professional</p> <ul style="list-style-type: none"> Complete periodic reviews of HSE pre-qualification requirements 	<p>Designated Lead</p> <ul style="list-style-type: none"> Final inspection of work Generate punch list items Evaluate documents submitted by contractor Maintain relevant records Develop defects list Ensure safe and effective mobilisation Review contractor performance Submit contractor evaluation to vendor management system Assist in contract closure <p>Contract Owner</p> <ul style="list-style-type: none"> Review contractor performance Contract closure activities <p>Procurement Professional</p> <ul style="list-style-type: none"> Assist in contractor performance reviews Assist in contract closeout
<p>The Designated Lead has overall accountability for development, execution and close out of the job scope of work.</p>	<p>The Procurement Professional is a Procurement team member who provides support throughout the contractor management process.</p>	<p>The Client is the person who initiates the work.</p>	<p>The HSE Professional is a member of the Health and Safety or Environment team who provides functional support throughout the contractor management process.</p>	<p>The Contract Owner has overall accountability for the contract and is the key point of contact in relation to the contract.</p>

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