

Contract:

TRIM/Contract Number:

1.0 PLAN & SCOPE

1.1 DEVELOP BUSINESS CASE FOR WORK

- PR Identify the requirements for work to be performed
- Define preliminary scope & timeframes
- Identify key stakeholders
- Initiate project (IFOT or PMO process)
- Use S2007 to build scope of works for the project (project methodology specific)
- Justification for project / funds
- Define Service and/or material strategy.
- PF194 Request for supply and contract services (per contract)

1.3 CATEGORISE WORK & IDENTIFY HAZARDS

- PR Identify High & Significant Risk Issues
- Identify contractor/work risk level [level 1 - low, 2 – medium & high]

1.4 DEVELOP CONTRACTING STRATEGY

- CC Define procurement/tendering strategy:
 - Use existing contract
 - Sole source
 - Request for 3 quotes
 - Tender
 - Determine selection criteria
 - Agree timeframes for process
 - RFP, SAP, TRIM to created for contract

1.5 DEVELOP DETAILED SCOPE OF WORK

- PR Identify key HSSE and contract KPI's – refer to Form S2164
- PR Prepare the contract scope of works using form PF238 or
- PR Prepare technical questions for tenderers using form S2098
- Assign roles & accountabilities
- Identify the needs for plans (safety/technical) to be submitted by the successful tender.

2.0 CONTRACTOR SELECTION

2.1 DEVELOP & RELEASE TENDER

- CC Confirm tender assessment criteria & process
- Pre-qualify potential tenders if appropriate
- Develop project information pack
- Issue tender & project information pack (Site Conditions) / Questionnaire / qualification.

2.2 EVALUATE TENDER

- HSSE **SELECTION CAPABILITY**
- 1 Evaluate tender responses using HSSE Prequalification Evaluation (Form S2099)
 - Overhaul Contracts to identify any changes in HSSE prequalification documents
- PR Confirm areas of current non-conformance of tenders

2.3 SELECT PREFERRED TENDER

- CC Tender Evaluation Spreadsheet is compiled into evaluation reports
- FIN Financial delegate to decide on appropriate contractor (understanding gaps)
- CC Complete tender process

2.4 NEGOTIATE & AWARD CONTRACT

- CC Conduct negotiations & document outcomes (including evaluation gap actions)
- Nominate contractor representative and site contact/s (If applicable)
- Establish vendor in SAP
- Award the contract
- Raise Purchase Requisition
- 2 Handover contract to Principal using Form S2164 as a guide.

3.0 MOBILISATION

3.1 BEFORE CONTRACTOR ARRIVES

- PR Request contractor plans for work
- HSSE 3 Review site specific HSSE Management Plan using compliance tool (S2165).
- CON 4 Prepare for contractor arrival – Contract, logistics, project dates, purchase orders, work packs, SWMS submitted.
- KICK OFF MEETING**
- 2 Conduct kick off meeting to communicate project expectations, scope, confirm KPI's and program dates
 - Review & authorise site & task specific SWMS/JSEA
 - Inspect & authorise registers e.g. Equipment, training competency and plant.
 - Hazardous chemicals approval submitted to site.

3.2 MOBILISATION

- SUP **Purchase Order entry point**
- SITE SETUP & FAMILIARISATION**
- 5 Conduct a site familiarisation session with the contract group using Form S2167
 - Review agreed logistics & site facilities (lay down, vehicle, amenities etc. - if applicable)
 - Arrange site access systems.
 - Online site induction and additional site specific inductions (e.g. construction, cooling tower)
 - Coordinate work area, induction & familiarisation.
 - PTW & other applicable Permits to perform work in place.
 - Competent trade persons and equipment operators completed (Verification of Competency process) and appointed to the task.

4.0 MANAGE & IMPROVE

4.1 INITIATE WORK & MONITOR

- SUP Verify work activity is in accordance with Permit To Work (PTW) system
- 5 Ensure that SWMS/JSEA are conducted to manage risk associated with change to task or environment
- CON Conduct Pre-start or Toolbox Meetings
- CON Conduct TRA on jobs every day
- Report & investigate all incidents
- SUP Ensure that changes in plant are managed in accordance with CS-AM-010 Plant Modification Procedure

4.2 MANAGE, AUDIT & REPORT

- HSSE **AUDIT CRITICAL CONTROLS**
- 3 HSSE audit are conducted according to plan/schedule based on risk.
 - Provide corrective action report to Principal Representative

- CON **CONTRACTOR REPORTING**
- 6 Provide interval reports of HSSE performance including sub-contract information (copy of report to HS Department)
 - Report on corrective action status

- PR **MANAGE & INTERVENTION**
- 2 Conduct review / KPI meeting with Contractor
- HSSE Intervention triggered through category 2 & 3 incidents, CCA, inspections or ad-hoc.
- PR Recognise good HSE performance
- CC Record key contract information

4.3 CONTINUOUS IMPROVEMENT

- PR Identify & consider improvement opportunities
- Share leading practices

5.0 CLOSE OUT

5.1 FINALISE & TRANSITION

- PR Plan contract transition: Assess completed work & Contractor performance (including subcontractors)
- CC Negotiate any outstanding commercial issues
- SUP De-mobilise the Contractors
- PR S2501 NGRS reporting
- PR ID Cards and Vehicle access, PTW locks to be relinquished.
- 7 Complete the close out report & update Contractor performance records
 - Update lessons learned and save to TRIM.
 - Evaluate contractor claims
 - SAP closeout

LEGEND

- FIN **Financial Delegate / Project Approval**
CS Energy who is financially accountable for the contract or project
Name:
- PR **Principal Representative/Site Rep**
CS Energy person who is accountable for the management of the contract.
Name:
- CC **Contracts Manager/Coordinator**
CS Energy person who provides Contract development & commercial advice.
Name:
- CON **Contractor/Supplier**
Contract employee who is the person to single point of contact.
Name:
- HSSE **HS/Environment Coordinator / Advisor**
CS Energy HS person who is able to provide WHS advice.
Name:
- SUP **CS Energy Site Contact**
CS Energy person who provides day to day supervision of the contractors work.
Name:

The circle denotes single line accountability for that task.

CONTRACTOR MANAGEMENT TOOLKIT

1 HSMS PRE-QUALIFICATION EVALUATION S2099 – [B/D/14/3971] – LINKED TO RFP

2 HANDOVER TO PRINCIPAL REPRESENTATIVE S2164 – [B/D/13/35180]

3 CONTRACTOR HSMS COMPLIANCE AUDIT S2165 – [B/D/13/37140]

4 MOBILISATION & SITE SETUP S2166 – [B/D/13/35178]

5 SITE CONTACT CHECKLIST S2167 – [B/D/13/35179]

6 CONTRACTOR SAFETY REPORT S2052 – [B/D/13/37141]

7 CONTRACTOR CLOSE OUT REPORT S2168 – [B/D/12/19149]

8 CONTRACTOR MANAGEMENT PROCESS AUDIT S2169 – [B/D/14/6688]