Contractor Management Quick Guide

Process & Tools











	STAGE	
- 1	Define the work	(

- 1.1 Understand needs
- 1.2 Identify risks and hazards
- **1.3** Develop job and/or contract scope
- 1.4 Decide appropriate procurement method

STAGE 2 Commercial engagement

- 2.1 Shortlist contractors
- 2.2 Contractor evaluation of scope
- 2.3 Tender/quote evaluation
- 2.4 Appoint contractor

STAGE 3 **Onboarding**

- 3.1 Review and approve work pack 4.1 Prestart
- 3.2 Inductions and training
- 3.3 Planning and permits
- **3.4** Mobilisation

STAGE 4 Manage and monitor work

- 4.2 Workplace interaction
- **4.3** Scope variation and delays
- 4.4 Reporting
- 4.5 Invoicing

STAGE 5 Review and close out

- **5.1** Confirm completion of deliverables
- 5.2 Demobilisation
- **5.3** Contract performance evaluation and close out

Contractor is equivalent to Contingent Worker

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

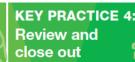




KEY PRACTICE 2: Set up to work



KEY PRACTICE 3: Workplace interactions





TOOLS:

B/D/21/532 S2311 - Scope of Work Development Tool*

B/D/12/43778 PF238 Scope of Work Template*

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

B/D/21/525 S2312 - Contract Summary

B/D/21/522 S2313 - Contract Implementation Meeting Agenda

B/D/13/35179 S2167 - Contractor Onboarding Checklist*

B/D/21/1628 CAL - Site Familiarisation

B/D/21/480 KOG - Site **Familiarisation**

Create a vendor - CS Energy Intranet

B/D/21/515 S2314 - HSE System Audit

B/D/21/481 S2315 - Punch List Template

B/D/12/19149 S2168 - Contractor Closeout Checklist*



Tools are optional unless indicated as mandatory (*)

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Roles & Responsibilities











STAGE 1 Define the work

Designated Lead

- Confirm Client has approved for work to proceed (e.g. SAP notification has been checked, internal order number generated for projects)
- Understand the requested work, including the root cause and contributing factors, and review any previous root cause analysis if available
- Understand the benefits to the business of completing the requested work
- Consult with relevant stakeholders as required, including the Client
- 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

Procurement Professional

 Liaise with Designated Lead on procurement options

Client

- Provide information to Designated Lead during scope development
- Decide on option that provides best business value

STAGE 2 Commercial engagement

Designated Lead

- Identify existing or potential contractors
- Evaluate technical capability of contractors
- Manage technical content enquiries from Contractor
- · Select winning quote

Client

 Assist Designated Lead to identify potential contractors

Procurement Professional

- Commercial pre-qualification
- · Manage site visit process
- · Select winning tender
- Implementation meeting for new contracts

Contract Owner

- Approve contract
- Ensure Purchase Order raised prior to start date

HSE Professional

- Establish HSE criteria
- HSE pre-qualification

STAGE 3 Onboarding

Designated Lead

- 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

Contractor Management Coordinator

- Verify CS Energy Scope document & approved PO is in place before access is granted
- Assist Designated Lead with Onboarding requirements/verifications where necessary
- Ensure consistent execution of sytematic processes across sites (Callide/Kogan) & teams (Project/General Plant)

HSE Professional

Review HSE information in work pack

STAGE 4 Manage and monitor work

Designated Lead

- · 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

Contractor Management Coordinator

 Conduct CCV's & Safety Interactions with Contractor work parties on site

Contract Owner

- Undertake workplace interactions
- Involvement in scope variations

HSE Professional

 Complete periodic reviews of HSE pre-qualification requirements

STAGE 5 Review and close out

Designated Lead

- 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

Contractor Management Coordinator

- Communicate out to all Vendors, changes in Site Requirements & Red/Green Banner announcements
- Collaborate with Contract Owner & HSE Professional on Contractor Performance and help facilitate meetings

Contract Owner

- · Review contractor performance
- · Contract closure activities

Procurement Professional

- · Assist in contractor performance reviews
- Assist in contract closeout

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.