

# 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
<b>1.1</b> Understand needs <b>1.2</b> Identify risks and hazards <b>1.3</b> Develop job and/or contract scope <b>1.4</b> Decide appropriate procurement method	<b>2.1</b> Shortlist contractors <b>2.2</b> Contractor evaluation of scope <b>2.3</b> Tender/quote evaluation <b>2.4</b> Appoint contractor	<b>3.1</b> Review and approve work pack <b>3.2</b> Inductions and training <b>3.3</b> Planning and permits <b>3.4</b> Mobilisation	<b>4.1</b> Prestart <b>4.2</b> Workplace interaction <b>4.3</b> Scope variation and delays <b>4.4</b> Reporting <b>4.5</b> Invoicing	<b>5.1</b> Confirm completion of deliverables <b>5.2</b> Demobilisation <b>5.3</b> 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 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

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

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

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



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.

For more details see [B/D/13/34521 CS-CMP-00 Contractor Management Procedure](#)

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