



Control of Contractors Training Course: Owner-Side Performance, Scorecards and Close-Out



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Introduction:

Control of contractors is a 5-day course for owner-side contract holders, contract engineers and operations managers that ends with a Contractor Control Plan and Scorecard for a case service contract. Organisations lose money, time and safety margin when contractors are mobilised without clear service levels, instructed informally, paid without verified progress and closed out with open defects and unresolved claims. Nominees already supervise service or project contractors day to day, and the course is taught through case study work on contract documents, work orders, payment applications and performance data. CoreConcept Training Center delivers this control of contractors course.

Course Objectives:

- Map the contractor management lifecycle and set out the contract holder's authority, duties and interfaces for a service or project contract
- Translate scope documents into service levels, KPIs and acceptance criteria against which a contractor can be measured
- Run mobilisation, kick-off, correspondence and work order approval routines that keep every instruction traceable
- Verify progress, quality and HSE evidence before certifying contractor payment applications
- Score contractor performance, control change and raise corrective actions that prevent claims and disputes
- Demobilise and close out contractors with a documented final account and a lessons-learned record

Target Audience:

- Owner-side contract holders accountable for the day-to-day delivery of service and project contracts
 - Contract engineers who issue instructions, track correspondence and prepare payment certificates
 - Operations and asset managers whose units depend on contractor output and agreed service levels
 - Site and facility supervisors who approve contractor work orders, timesheets and completions
 - Project control and commercial staff who report contractor cost, progress and change
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Course Outline:

Day 1: Contractor Control Lifecycle and the Owner-Side Role

- Contractor Management Lifecycle Map From Need to Close-Out
- Contract Holder and Company Representative Authority Matrix
- Owner-Side RACI Chart for Contractor Supervision Duties
- Contractor Risk Categorisation by Work Type and Exposure
- Current-State Diagnostic of Existing Contractor Control Practice

Day 2: Scope, Service Levels, Selection Handover and Mobilisation

- Scope of Work and Technical Specification Clarity Review
- Service Level Agreement Design With Measurable Acceptance Criteria
- Contractor KPI Definition Cards With Named Data Sources
- Prequalification and Tender Evaluation Results Handed to Contract Holders
- Mobilisation Readiness Checklist and Kick-Off Meeting Agenda

Day 3: Day-to-Day Contractor Control and Payment Certification

- Contract Correspondence Register and Site Instruction Protocol
- Work Order Issue, Approval and Completion Sign-Off Workflow
- Progress Measurement and Timesheet Verification for Payment Certificates
- Quality Inspection Points and Nonconformance Report Handling
- HSE Interface Meetings and Contractor Safety Observation Records

Day 4: Contractor Performance, Change Control and Dispute Avoidance

- Contractor Performance Scorecard Weighting and Monthly Review Cycle
- Change Request Log and Variation Impact Assessment Before Instruction
- Claims Prevention Through Early Notices and Contemporaneous Records
- Corrective Action Requests and Contractor Performance Improvement Plans
- Escalation Ladder and Dispute Avoidance Meetings With Contractors

Day 5: Case Study Work on a Contractor Control Plan and Scorecard

- Case Service Contract Pack and Contractor Performance Data Set
 - Scorecard Build and Scoring of Case Contractor Performance
 - Demobilisation Checklist, Final Account and Contract Close-Out Report
 - Contractor Relationship Review and Lessons-Learned Capture
 - Contractor Control Plan Completion and Peer Challenge Panel
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Skills You Will Gain:

- Contractor Lifecycle Planning
- Service Level Specification
- Work Order Control
- Payment Certification
- Contractor Scorecarding
- Variation Impact Assessment
- Corrective Action Management
- Contract Close-Out

Why Attend This Course:

- Deliver a Contractor Control Plan and Scorecard for a case service contract to the contract owner and operations management
- Decide when contractor work can be certified for payment, when a change needs a formal variation and when a corrective action request is due
- Avoid overpayments, informal instructions and late claims that arise when contractor records are incomplete
- Share the scorecard template, work order workflow and close-out checklist with colleagues who supervise other contracts

Conclusion:

Back at work, the participant hands the Contractor Control Plan and Scorecard to the contract owner and operations management, who use it to agree supervision duties, approve payments and decide on corrective action or contract extension. Contract engineers and supervisors then apply the same work order workflow, scorecard and correspondence register to other contractors in the unit. After the first quarterly scorecard review, the organisation should check whether KPI data arrived on time, whether scores matched observed performance and whether corrective actions closed, then adjust weightings and thresholds.

Frequently Asked Questions FAQ:

What should participants know before the control of contractors course?

Participants should already supervise or administer at least one service or project contract on the owner side. Familiarity with scopes of work, work orders and payment applications helps. Bringing an anonymised contract, KPI list or recent payment certificate lets them test the scorecard on their own contractor.

How does the control of contractors course differ from a contract administration or contractor prequalification course?

It follows the owner-side contract holder from mobilisation to close-out, with the weight on supervision, scorecards, payment certification and corrective actions. General contract administration, contractor prequalification and contractor safety permits appear only at overview level, as handover points into the control routine.

Why does control of contractors rely on a contractor scorecard?

A scorecard turns service levels and KPIs into a regular, weighted score that both parties see. It gives the contract holder evidence for payment decisions, corrective action requests and extension or re-tender choices, replacing opinion with recorded performance data reviewed at agreed intervals.

What do participants take back to work from the control of contractors course?

Participants take back a Contractor Control Plan and Scorecard for a case service contract, with a work order workflow, payment certification checklist, change log, corrective action template and close-out checklist that can be adapted to the contracts they supervise.
