

CONTRACT WORK PROCEDURES

This is an example of a list of contract work procedures as developed by a leading general contractor. The ones with an asterisk does not specifically need to be an activity to be developed as a managerial activity. It can be carried out by a senior contracts director or manager with limited time available when visiting a project to review progress.

Section 1 Preparation for tender

- 2.1. Action for tender receipt
- 2.2. Document received
- 2.3. Initial discussion check-list
- 2.4. Letters for declining tender invitation
- 2.5. Accepting tender invitation
- 2.6. Notification of tender
- 2.7. Tender strategy meeting
- 2.8. Review of tender risk
- 2.9. Site visit check-list
- 2.10. Despatch of tender
- 2.11. Document control and storage

Section 2 Award of contract

- 2.1. Contract award
- 2.2. Contract procedures
- 2.3. Authorisation – works order
- 2.4. Contract documents filing and review procedure
- 2.5. Contract handover meeting agenda
- 2.6. Contract planning check-list

Section 3 General procedures for control of contract documents

- 3.1. General procedures
- 3.2. Tender offers
- 3.3. Contract documents/agreements, etc.
- 3.4. Incoming drawings
- 3.5. Consultant's/specialist drawings
- 3.6. Specifications
- 3.7. Bills of quantity
- 3.8. Contract completion
- 3.9. General notes for filing index
- 3.10. Site diary
- 3.11. Archiving procedures
- 3.12. Filing index

Section 4 Procurement

- 4.1.1. Procurement of materials
- 4.1.2. Vendor lists
- 4.1.3. Material requisition
- 4.1.4. Quotation summaries
- 4.1.5. Despatch of orders
- 4.1.6. Post-contract orders
- 4.1.7. Initiating orders

- 4.1.8. Site orders
- 4.1.9. Additions to original orders
- 4.1.10. Bulk orders
- 4.1.11. Surplus materials
- 4.1.12. Samples
- 4.2.1. Subcontractor packages
- 4.2.2. Subcontractor questionnaires
- 4.2.3. Subcontractor data records
- 4.2.4. Subcontractor requisition
- 4.2.5. Tender documentation for subcontractors
- 4.2.6. Summaries of subcontractor's quotations
- 4.2.7. Appraisal of subcontractor
- 4.2.8. Initiating subcontract agreements
- 4.2.9. Subcontract agreements
- 4.2.10. Site orders
- 4.2.11. Performance reports (see separate procedures for management contracts)
- 4.2.12. Client-supplied product
- 4.2.13. British Standards

Section 5 Construction Stage

- 5.1. Pre-contract procedures
 - 5.1.1. Pre-site start meeting
- 5.2. Filing
 - 5.2.1. Setting up site
 - 5.2.2. Site presentation
 - 5.2.3. Hoardings
 - 5.2.4. General site layout
 - 5.2.5. Visitors to site
 - 5.2.6. Adjacent owners
 - 5.2.7. Statutory licences
- 5.3.1. Site meetings
- 5.3.2. Contracts review meeting
- 5.3.3. Site subcontractor meetings
- 5.3.4. Site subcontract completion meetings
- 5.3.5. Contract completion and handover
- 5.3.6. Final completion (on site)
- 5.3.7. Contract management review
- 5.3.8. Reports and returns form site
- 5.3.9. Confirmation of instructions
- 5.3.10. Request for information
- 5.3.11. Observation form
- 5.4. Control of subcontractors
 - 5.4.1. Subcontractor pre-start meeting
 - 5.4.2. Progress meetings
 - 5.4.3. Subcontractor personnel

- 5.4.4. Subcontractor performance reports
- 5.4.5. Inspection of work
- 5.4.6. Substandard work – corrective actions
- 5.4.7. Damage reports
- 5.4.8. Inspection/measuring equipment
- 5.4.9. Variation to work instructions
- 5.5. Control of materials and components on site
 - 5.5.1. Receipt of materials/components
 - 5.5.2. Material-received sheets
 - 5.5.3. Unchecked deliveries
 - 5.5.4. Rejected material
 - 5.5.5. Subcontractor material
 - 5.5.6. Delivery of subcontractor material
 - 5.5.7. Subcontractor material storage
 - 5.5.8. Site material ordering
 - 5.5.9. Bulk orders
 - 5.5.10. Surplus material
 - 5.5.11. Theft
- 5.6.1. Purchaser (client) supplied product
- 5.6.2. Special material
- 5.6.3. Insurance
- 5.7.1. Setting out
- 5.7.2. Calibration of equipment
- 5.7.3. Hired-equipment requisition
- 5.7.4. Records
- 5.7.5. Datum and grid lines
- 5.8.1. Inspections and test
- 5.8.2. Testing
- 5.8.3. Test certificates
- 5.8.4. Test facilities
- 5.9. Protection and cleanliness
 - 5.9.1. Protection of finished work
 - 5.9.2. Cleaning of roads and pathways
 - 5.9.3. Site cleanliness and clearance of rubbish
 - 5.9.4. Waste disposal
- 5.10. Procedure for handling disputes
 - 5.10.1. Complaints record sheet
 - 5.10.2. Investigation of complaints
- 5.11.1. Accident report
- 5.11.2. Loss and damage report