
Contractor Safety Oversight from Prequalification to Close-Out Training Course

18 – 22 October 2027
Cape town





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Programme Summary

Contractor safety oversight from prequalification to close-out is a five-day training course for senior leaders at strategic level, culminating in a contractor HSE assurance plan for a live or forthcoming contract. Much high-risk work is done by contractors, yet client controls weaken at each hand-over between procurement, project and operations teams. The approach treats each contract phase, from selection to demobilisation, as a point of control. Mars Training Centre UK delivers this programme in contractor safety oversight.

The Business Case

Serious injuries and fatalities concentrate in contracted work, where responsibility is divided. A client that sets clear HSE criteria before award, agrees how the two management systems connect and checks performance in the field retains control without carrying out the contractor's work.

- Contractor Incident Frequency and Severity: Fall when capability is tested before award and supervision matches the hazard.
- Schedule and Cost Disruption: Reduce when HSE requirements are priced into the contract, not found after mobilisation.
- Supply Chain Assurance Quality: Improves as performance data informs renewals and approved vendor lists.

Principles and Evidence Base

- IOGP Report 423 HSE Management Guidelines for Working Together in a Contract Environment: Provides the lifecycle phases and contract modes organising Sessions 1 to 4.
- IOGP Contractor HSE Capability Assessment and Scoring System: Informs the prequalification questionnaire and weighted scoring built in Session 2.
- ISO 45001:2018 Clause 8.1.4.2 on Contractors: Frames procurement coordination and selection criteria in Sessions 2 and 3.
- Leading and Lagging Indicator Model: Shapes the contractor performance scorecard and close-out evaluation in Session 4.

Intended Participants

- Executives accountable for HSE in contracted operations or construction.
- Leaders who approve contractor selection, award and renewal decisions.
- Heads of function who set procurement policy for high-risk services.
- Senior managers owning the client-contractor interface on major projects.
- Directors reporting contractor HSE performance to boards.



The programme serves oil and gas, petrochemicals, construction, utilities and facilities management.

Learning Outcomes

1. Participants will be able to diagnose where a contractor management process loses control across the contract lifecycle.
2. Participants will be able to construct risk-based prequalification criteria and a weighted scoring method for contractor selection.
3. Participants will be able to specify HSE requirements for tender documents and contracts.
4. Participants will be able to design a bridging document linking client and contractor management systems.
5. Participants will be able to evaluate contractor performance using leading and lagging indicators.
6. Participants will be able to justify renewal, improvement or exit decisions from close-out evaluation evidence.

Programme Structure

Day 1: Contractor Safety Oversight as a Client Responsibility

Where does the client's duty for contracted work begin and end?

- IOGP Report 423 Contract Lifecycle Phases
- Contract Modes and Ownership of the HSE Management System
- Risk Classification of Contracted Services
- Lessons From Contractor Serious Injury and Fatality Cases
- Contractor Management Process Health Check

Day 2: Prequalification and Selection

How is HSE capability tested before a contract is awarded?

- ISO 45001:2018 Clause 8.1.4.2 Selection Criteria
- Prequalification Questionnaire Design
- IOGP Capability Assessment and Weighted Scoring
- Technical and HSE Bid Evaluation Panels
- Subcontractor Approval and Flow-Down Rules

Day 3: Contract Requirements, Bridging and Mobilisation

How are HSE expectations written into the contract and carried to the worksite?

- HSE Specifications in Tender Documents
- Bridging Document Structure and Approval
- Interface Management Between Permit and Work Control Systems
- Pre-Mobilisation Audit and Kick-Off Meeting
- Contractor Workforce Competence and Induction Checks



Day 4: Monitoring Execution and Measuring Performance

How does the client verify contractor performance during the work and after it?

- Risk-Based Supervision and Site Verification Plans
- Contractor HSE Performance Scorecard
- Incident Reporting, Investigation and Shared Learning
- Escalation, Stop-Work and Corrective Action Routes
- Demobilisation and Close-Out Evaluation

Day 5: Applying Contractor Safety Oversight

How are the tools combined into an assurance plan for a real contract?

- Applying the Health Check to a Participant Contract
- Scoring a Sample Contractor Submission
- Drafting a Bridging Document Outline
- Peer Challenge of Supervision and Scorecard Choices
- Contractor HSE Assurance Plan Presentation

Methodology

The programme relies on case analysis of contracted work in energy, construction and facilities settings, with structured exercises on participants' own contracts. Participants score contractor submissions, draft contract and bridging requirements, and defend decisions before peers acting as a contract review board.

- Suggested activity: Scoring two competing contractor prequalification submissions against weighted HSE criteria.
- Suggested activity: Mapping the interfaces between client and contractor work control systems for a shutdown.
- Suggested activity: Reviewing a contractor's quarterly scorecard and deciding on renewal, improvement or exit.

Capstone Output

Each participant completes a contractor HSE assurance plan for one contract. It contains a risk classification, weighted prequalification criteria, contract HSE clauses, a bridging document outline, a supervision plan, a performance scorecard and a close-out template, ready for procurement and operations leadership.



Frequently Asked Questions

Is contractor safety oversight training suitable for senior leaders?

Yes. It is designed for directors and heads of function who approve or oversee contracted high-risk work. It assumes authority over at least one contract, but no specialist procurement or auditing training.

Which standards underpin contractor safety oversight in this programme?

It draws on IOGP Report 423 for the contract lifecycle and contract modes, the IOGP capability assessment and scoring supplement for selection, ISO 45001:2018 clause 8.1.4.2 for contractor requirements, and the leading and lagging indicator model for performance measurement.

How is the contractor HSE assurance plan used at work?

It becomes a working plan for a live or forthcoming contract. Procurement inserts its criteria and clauses into tender packages, while project teams use the bridging outline, supervision plan and scorecard through to close-out.

How does contractor safety oversight differ from a general HSE management programme?

It concentrates on the client-contractor relationship rather than your own workforce, following a contract through selection, requirements, interfaces and verification instead of building an internal safety management system.