



CONTRACT MANAGER SELF ASSESSMENT

Information

This Contract Manager Self Assessment tool has been developed by the Department of Finance for use by WA Public Sector Agencies as appropriate.

The tool can be used to gauge a contract manager's general understanding of contract management tasks and responsibilities. It can be utilised as an electronic form or as a printed form.

How and when the Contract Manager Self Assessment tool is used is entirely discretionary. Agencies may modify the tool to suit their own requirements. In using the tool, an Agency acknowledges that it will retain ownership and responsibility for its maintenance, and the input and management of all content including modifications.

The tool can be downloaded from [I'm a Contract Manager](#) webpage.

Any feedback for proposed improvements to the Contract Manager Self Assessment tool is welcomed by the Contract Management Advisory Services team via email at cmas@finance.wa.gov.au

More Information

Further information on contract management resources can be found at the [I'm a Contract Manager](#) webpage on the Department of Finance's website.



CONTRACT MANAGER SELF ASSESSMENT

Agency Name:

Date:

Name:

Position:

Outlined below are a number of general contract management tasks and responsibilities. Read each one and then answer **Yes** if the statement is true for the contract/s you manage or **No** if it's not. If the statement is not applicable answer **NA**. If you are unsure or you do not know whether the statement is true or not, answer **DNK**.

- 1 I have all the necessary documents for the contract/s I manage. _____
ie: General conditions of contract, request document, respondent's offer, contract award letter, etc.

- 2 I understand the overall scope and nature of the contract/s I manage including the primary objectives and the risks. _____

- 3 I make sure the incoming contractor/s understands their role and responsibilities as well as mine. _____

- 4 I understand the importance of good communication and I keep in regular contact with the contractor/s. _____

- 5 I manage the performance of the contract/s and ensure that contract requirements are being supplied at the correct standard/quality, on time and within budget. _____

- 6 On a regular basis, I document the issues, actions and results that happen to the contract/s to reflect the current situation and I file the documents in one place. _____

- 7 I keep track of the important contract dates and take timely action when they are due. _____
ie: Extension option due dates, insurance expiry dates, contract expiry date, milestone delivery dates, etc.

- 8 I make sure all invoices are checked and fully supported before payment. _____
ie: Goods/services have been received, costs are in accordance with the agreed contract price/s, etc

- 9 I always track the payments made for the contract/s against the contract value/s. _____

- 10 I manage variations to the contract/s through a formal contract change process. _____
ie: Variations are registered, fully considered and documented and approved by an authorised person.

- 11 I conduct reviews of the contract/s on a regular basis (at least annually) to ensure that the agency's requirements are still being met and are also still required. _____

- 12 When a contract finishes I make sure everything has been finalised. _____
ie: Everything has been received, all invoices have been paid, any agency property has been returned, etc.

- 13 When a contract is to be recalled I know how much time to allow for the planning and procurement processes so that a new contract will be in place prior to the expiry of the current contract. _____

- 14 I make sure any information on lessons learnt in the current contract/s are incorporated in the planning and procurement processes for the replacement contract/s. _____

- 15 I am aware of the legislative, compliance, governance and audit requirements that have an effect on the contract/s that I manage. _____
ie: State Supply Commission policies, Treasurer's Instructions, records management act, etc.

- 16 I know where to obtain further information, advice and resources on contract management. _____

If you have answered **No** or **DNK** (Do Not Know) for any of the above, you should consider obtaining further information and/or training on contract management tasks and responsibilities. The Department of Finance Government Procurement provides an awareness session and training on contract management. Details can be found at [I'm a Contract Manager](#) page on the Department of Finance website.