WHS DOCUMENTS & TEMPLATES

DOC-CON-PLAN · Contractor Management Plan

Product Overview

For: Australian businesses that engage contractors: owners and managers, contract and procurement managers, site supervisors, and the WHS and risk advisers who support them

Version 1.0 · 13 November 2026

SAMPLE

A risk-based contractor management plan for Australian businesses: a plain-English plan and policy, with the tools to plan, engage, deliver and evaluate contracted work, every stage scaled to the contract's risk tier, aligned to the model WHS laws, ISO 31000:2018 and AS/NZS ISO 45001:2018.

Contractor interfaces are one of the most consistent contributors to serious incidents, and contracted work carries more than safety risk: the service, the schedule, the cost, the business's reputation, the environment and its information. Engaging a contractor never hands the business's duties to someone else: under the WHS laws, more than one business can hold the same duty, and each must consult, cooperate and coordinate with the others.

This plan manages contracted work as a whole-of-business risk. Each contract is rated once, before it is engaged, for its inherent risk across six areas on the same risk matrix as the WHS risk register, and its tier sets the level of control at every stage: planning and procurement, pre-qualification and selection, the contract, the contractor's safety plan, induction, interfaces, field verification of critical controls, change, non-conformance and stop-work, subcontracting, performance evaluation, close-out, the approved contractor register and reporting to leadership.

It is written once for the whole of Australia, to the model WHS laws, with notes on how Victoria, Western Australia and the Commonwealth (Comcare) differ, and it leaves the detail of each jurisdiction to the business's own WHS management system, such as Orana Skills Centre's NSW WHS Management Plan. It is aligned to ISO 31000:2018, AS/NZS ISO 45001:2018 (procurement, contractors and outsourcing), ISO 9001:2015 and ISO 14001:2015, with a cross-reference to each. It is not certification.

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[Company name]

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Contractor Management Plan

How the business plans, engages, delivers and evaluates contracted work, scaled to the risk

Document number		**Version**	
Plan owner		**Approved by**	
Date approved		**Next review date**	

How to use this plan

- This is **[Company name]**'s operating plan for contracted work. Each part says what the arrangement is for, what we do step by step, who does it, the tools and records we use, how we check it is working, and when we review it.
- The plan applies to every contract, but not in the same way. Each contract is rated once, before it is engaged, and its tier sets how much control each later stage needs.
- The tools named in each part are in folders 03 to 06, one folder for each stage. Fill in every placeholder in square brackets, delete what does not apply, and add your own arrangements.

1 Purpose, scope and objectives

[Company name] uses contractors to do work it cannot or should not do itself. Contracted work brings risk to people, to our operations, to our finances and reputation, to the environment and to our information. Many serious incidents happen at the interface between a business and its contractors: where nobody was sure who controlled what, where a change was not thought through, or where the controls were assumed and never checked. This plan sets out how we manage those risks through the whole life of a contract: how we plan the work, engage the contractor, deliver the work and evaluate it.

This plan covers: **[Scope of the plan]**. It applies at **[Sites covered]** to every contractor and subcontractor who does work for us, including trades, maintenance and services contractors, consultants who work on site or with our systems, labour hire providers and their workers, and suppliers who deliver, install or service on site. It sits under our WHS management system and uses its risk register, permits, incident reporting and management review. It does not replace them.

Our objectives for contracted work	How we measure it (part 10)
No contractor's worker, our worker or member of the public seriously hurt by contracted work	Incidents and notifiable incidents involving contractors
Every contract rated and tiered before it is engaged	Contracts tiered before engagement: 100%
The critical controls for Tier 1 and Tier 2 work verified in the field on schedule, and working	Field verifications on schedule; critical controls found working
Contractors chosen on capability, safety and value, and kept only while they perform	Contractors pre-qualified and current; evaluations on time; KPI totals
Contracted work delivered to the standard, schedule and budget agreed, without environmental or information incidents	KPI scorecards; incidents by area

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Pre-qualification Questionnaire

Stage 2: for the contractor to complete, with evidence. The parts required depend on the tier

Contractor (legal name)		**ABN**	
Work or services offered		**Contact person and role**	
Phone and email		**Tier of the work (set by [Company name])**	

For the contractor

- Complete the parts the table below marks for the tier, and attach the evidence asked for. We verify what you tell us.
- If a question does not apply, say why. Incomplete answers delay your pre-qualification.
- Your information is used to assess your pre-qualification and is kept confidential.

Part	Tier 1	Tier 2	Tier 3	Tier 4
A Business details; C Insurances; D Licences	•	•	•	•
B Capability and capacity	•	•	•	
E WHS management and performance	•	•	•	
F Quality; G Environment; H Information and security	•	•		
I Financial stability; J References; K Subcontracting	•	•		

A Business details

Trading name		**Business structure (company, partnership, sole trader)**	
Address		**Years in business**	
Number of workers (employees and subcontractors)		**Parent or related companies**	

B Capability and capacity

Question	Answer and evidence
Describe similar work you have done in the last three years: client, scope, size, outcome	
Who will supervise the work, and what is their experience?	
What plant and equipment will you use, and is it owned or hired?	

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[Company name]

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Site Monitoring and Field Verification Checklist

Stage 3: checking in the field that contractors' controls are in place and working, scaled by tier

Contractor		**Contract or work package**	
Tier		**Work area**	
Verified by		**Date and time**	

How often

- Tier 1: critical controls every shift; a full check weekly. Tier 2: at least weekly, critical controls each time. Tier 3: at the start, then at least monthly. Tier 4: at the start and at completion.
- Look at the work, not the paperwork. Talk to the workers doing it. Mark each item Pass, Not met or N/A.
- A critical control found Not met is a Critical non-conformance: stop that work until it is fixed, and raise a Non-conformance Report.

Item	Result	Action, owner and date
General		
Work is within the agreed scope, area and hours	☐ Pass ☐ Not met ☐ N/A	
Contractor's supervisor on site and known to the workers	☐ Pass ☐ Not met ☐ N/A	
Every worker on site inducted and signed in	☐ Pass ☐ Not met ☐ N/A	
SWMS or safe work procedure on site, and the work is being done the way it says	☐ Pass ☐ Not met ☐ N/A	
Permits current, displayed and followed	☐ Pass ☐ Not met ☐ N/A	

Item	Result	Action, owner and date
People and competence		
Licences and competencies match the work being done	☐ Pass ☐ Not met ☐ N/A	

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Contractor Management Plan

END OF THE FREE SAMPLE

This sample shows a few pages, so you can judge the layout and the quality. A risk-based contractor management plan for Australian businesses: a plain-English plan and policy, with the tools to plan, engage, deliver and evaluate contracted work, every stage scaled to the contract's risk tier, aligned to the model WHS laws, ISO 31000:2018 and AS/NZS ISO 45001:2018.

What the full product contains

- **Contractor Management Plan, in plain English, with a policy to sign and a roles and accountabilities guide**
  02_PLAN/ (.docx and .pdf)
- **Australian law cross-reference (model WHS laws, Victoria, WA, Comcare), and an ISO standards cross-reference**
  02_PLAN/ (.docx and .pdf)
- **Excel contractor risk tiering tool on the owner's risk matrix, a need, scope and risk brief, and a contract requirements checklist**
  03_PLAN_THE_WORK/ (.xlsx, .docx and .pdf)
- **Pre-qualification questionnaire, an Excel evaluation matrix, a safety plan and SWMS review checklist, and a mobilisation and induction checklist**
  04_ENGAGE/ (.xlsx, .docx and .pdf)
- **Interface and coordination agreement, field verification checklist, contract change risk check, non-conformance and stop-work procedure and report, subcontractor approval form**
  05_DELIVER/ (.docx and .pdf)
- **Performance evaluation, Excel KPI scorecard, close-out and lessons learned review, Excel approved contractor register, governance dashboard and report**
  06_EVALUATE_AND_CLOSE/ (.xlsx, .docx and .pdf)
- **Setup guide and 90-day implementation plan; Read Me First, Product Overview, Permitted Use Terms, Version Information**
  01_START_HERE/ (.docx and .pdf)

Formats

- Word (.docx), editable, with your logo and business name in the header
- Excel (.xlsx), editable, with dropdowns and formulas
- PDF copies of the Word documents, for printing blank
- Delivered as a single ZIP download

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