WHS DOCUMENTS & TEMPLATES

DOC-PRJ-PLAN · Project Management Plan

Product Overview

For: Australian businesses that run projects of any kind: owners and managers, project sponsors and project managers, facilities, operations, IT and events managers, and the WHS and risk advisers who support them

Version 1.0 · 13 November 2026

SAMPLE

A risk-based project management plan for Australian businesses: a plain-English plan and policy, with the tools to initiate, plan, approve, deliver, close and evaluate projects of every kind, each stage scaled to the project's risk tier, aligned to the model WHS laws, ISO 21502:2020, ISO 31000:2018 and AS/NZS ISO 45001:2018.

The decisions leaders make about a project, from whether it goes ahead to who delivers it and how closely it is overseen, shape its risks and its outcomes. Projects bring new work, new people and new interfaces in a short time, and they carry more than safety risk: the schedule, the cost, the service, the business's reputation, the environment and its information. Under the WHS laws, designers must design out risks so far as is reasonably practicable, a construction project needs a principal contractor with a WHS management plan, and every business on the project must consult, cooperate and coordinate.

This plan manages projects of every kind as a whole-of-business risk: capital and construction works, fit-outs and refurbishments, plant and equipment upgrades, events, IT and digital projects, process improvement, and shutdowns and outages. Each project is rated once, at initiation, for its inherent risk across six areas on the same risk matrix as the WHS risk register, with schedule and cost rated within them, and its tier sets the governance, planning depth, gates, assurance and evaluation through six stages: initiate, plan, approve, deliver, close and evaluate, with three gates. Small, low-risk projects have a light path on one form.

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. It is aligned to ISO 21502:2020 (project management), ISO 31000:2018, AS/NZS ISO 45001:2018, ISO 9001:2015 and ISO 14001:2015, with a cross-reference to each. It is not certification. It goes with Orana Skills Centre's Contractor Management Plan and Change Management Plan, and works on its own where a business has neither.

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Project Management Plan

How the business initiates, plans, approves, delivers, closes and evaluates its projects, scaled to the risk

Document number		**Version**	
Plan owner (portfolio lead)		**Approved by**	
Date approved		**Next review date**	

How to use this plan

- This is **[Company name]**'s operating plan for projects. 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 project, but not in the same way. Each project is rated once, at initiation, for its inherent risk. The tier sets its governance, planning depth, gates, assurance and evaluation.
- The tools named in each part are in folders 03 to 06. Fill in every placeholder in square brackets, delete what does not apply, and add your own arrangements.

1 Purpose, scope and objectives

Projects bring new work, new people and new interfaces in a short time, and the decisions leaders make about a project (its scope, its timing, its budget, who delivers it and how closely it is overseen) shape its risks and its outcomes more than any form. This plan sets out how **[Company name]** manages its projects on the basis of risk, across the whole of the project and not only health and safety: how we decide a project is needed, plan it to the depth its risk needs, approve it at the right level, deliver it with the controls verified in the field, close it against what it was meant to achieve, and learn from it.

This plan covers: **[Scope of the plan]**. It applies at **[Sites covered]** to every kind of project in part 4, whoever runs it. It sits under our WHS management system and uses its risk register, consultation arrangements, incident reporting and management review. It does not replace them.

Our objectives for projects	How we measure it (part 14)
No one seriously hurt, and no Major harm in any area, on or because of a project	Incidents on projects, by severity
Every project tiered at initiation, and governed, planned and assured as its tier requires	Projects tiered before Gate 1: 100%; gates passed at the right authority
Critical controls verified in the field, not assumed	Field verifications done as the tier sets; critical controls found not working
Projects delivered to their success criteria, on time and within budget, or the variance approved	Schedule and cost performance; projects accepted against their success criteria
The benefits realised, and the lessons fed back into how we work	Post-implementation reviews done; lessons actioned

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Project Brief and Business Case

Stage 1: why the project is needed, what it must achieve, its tier, and who is accountable

Project number (from the dashboard)		**Project name**	
Proposed by		**Project sponsor**	
Project manager		**Date**	

How much to complete

- Tier 1: every part, as a full business case with the options costed. Tier 2: every part. Tier 3: parts A to E, as a brief.
- Tier 4: part A, then part F, the light path. Part F is the whole record for a Tier 4 project.
- Complete part A before anyone commits to how the project will be done. Rate the tier in the Project Risk Tiering Tool and copy the result to part D.

A The need

Question	Answer
What is the need or opportunity, and why now?	
What happens if we do nothing?	
What will the project deliver?	
Where, and which parts of the business, people and operations does it affect?	
The dates that cannot move, and why	
The approvals, permits or licences it needs	

Kind of project (tick all that apply)	Tick
Capital and construction works	☐
Fit-outs and refurbishments	☐
Plant and equipment upgrades	☐
Events	☐
IT and digital	☐
Process improvement	☐
Shutdowns and outages	☐

B The options and the business case

Option	What it involves	Cost (estimate)	Benefits	Main risks
Do nothing				

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Field Verification Checklist

Stage 4: verifying the critical controls where the work is done, at the frequency the tier sets

Project number		**Project**	
Tier		**Area or work front**	
Verified by		**Date and time**	

How to verify

- Go to the work. Check each critical control for the activities under way: is it in place, is it being used, and does it work? Talk to the crew about how the work is really done.
- Tier 1: every shift where the activity is under way, and a formal check weekly. Tier 2: at least weekly. Tier 3: at the start of each critical activity, then monthly.
- Mark the activities not under way N/A.

Escalate

If a critical control is missing or not working: stop the activity, make it safe, and fix it before the work goes on. Tell the project manager and the principal contractor, and record it below.

Check	Result	Evidence or comment
Work at height		
Edge protection or scaffold complete, inspected and tagged	☐ Pass ☐ Not met ☐ N/A	
Elevating work platforms inspected; operators licensed where required	☐ Pass ☐ Not met ☐ N/A	
Drop zone below barricaded	☐ Pass ☐ Not met ☐ N/A	

Check	Result	Evidence or comment
Excavation and trenching		
Underground services located and marked	☐ Pass ☐ Not met ☐ N/A	
Benching, battering or shoring in place as designed	☐ Pass ☐ Not met ☐ N/A	

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Project 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 project management plan for Australian businesses: a plain-English plan and policy, with the tools to initiate, plan, approve, deliver, close and evaluate projects of every kind, each stage scaled to the project's risk tier, aligned to the model WHS laws, ISO 21502:2020, ISO 31000:2018 and AS/NZS ISO 45001:2018.

What the full product contains

- **Project Management Plan, in plain English, with a policy to sign and a roles and governance 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)
- **Project brief and business case with a light path for small projects, Excel project risk tiering tool on the owner's risk matrix, Excel stakeholder register, and Gate 1 approval record**
  03_INITIATE/ (.xlsx, .docx and .pdf)
- **Project execution plan, Excel project risk register with risk-based contingency, safety in design review, project WHS plan, procurement and contracting plan, communication plan, and Gate 2 approval record**
  04_PLAN_THE_PROJECT/ (.xlsx, .docx and .pdf)
- **Project status report with earned value, Excel issues and change log, project health check, field verification checklist, and interface and coordination register**
  05_DELIVER/ (.xlsx, .docx and .pdf)
- **Handover and commissioning checklist, project closure report, post-implementation review, Excel lessons learned register and project portfolio dashboard**
  06_CLOSE_AND_EVALUATE/ (.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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