

Contractor Safety Management Checklist

A self-assessment tool for selecting and controlling contractors, aligned with the structure of ISO 45001:2018 Occupational Health & Safety Management Systems.

DETAILS

Organization / Site	
Contractor / Company	
Scope of work	
Contract / PO reference	
Completed by (name & role)	
Date of assessment	

HOW TO USE THIS CHECKLIST

- Work through the four sections in order — they follow the lifecycle of a contract: **1) Pre-Qualification & Selection, 2) Mobilization & Pre-Start, 3) During Work / On-Site, 4) Close-Out & Evaluation.**
- For each item, tick one status box and note the evidence or any action in the right-hand column. Evidence means a record you can point to: a permit number, induction register, certificate or report.
- Each item shows the relevant **ISO 45001:2018 clause** so you can trace it back to the standard.
- Rule of thumb: do not start work in a phase while any **No** item for that phase is still open.
- Adapt to your risk: short, low-risk visits may mark several items **N/A** (note why); higher-risk or longer contracts warrant deeper checking.

STATUS KEY

Yes	met and verified with evidence
In Prog.	underway / partial
No	not met; action required
N/A	not applicable (justify in notes)

SECTION 1 — PRE-QUALIFICATION & SELECTION (verify competence, insurance & capability before award)

#	Checklist Item / Requirement	ISO 45001 Clause	Yes	In Prog.	No	N/A	Evidence / Notes
A. Context, Roles & Procurement Controls							
1	A documented procedure exists for selecting, evaluating and controlling contractors and outsourced processes.	8.1.4.1 / 8.1.4.3					
2	OH&S criteria are defined and applied within procurement / tendering before award.	8.1.4.1					
3	Interested parties affecting this work (regulators, client, neighbours) are identified.	4.2					
4	Roles, responsibilities and authorities for managing the contractor are assigned and communicated.	5.3					
5	The contractor's activities are considered within the scope of the OH&S management system.	4.3 / 4.4					
B. Contractor OH&S Capability & Track Record							
6	Contractor holds a documented OH&S policy and, where appropriate, an established/certified OH&S system.	5.2 / 8.1.4.2					
7	Competence verified: relevant licences, accreditations, trade certifications and registrations.	7.2					
8	Historical OH&S performance reviewed (incident/injury rates, enforcement actions, prosecutions).	8.1.4.2 / 9.1					
9	References / prior client feedback on safety performance obtained where appropriate.	8.1.4.2					
10	Valid insurances confirmed (employers' liability / workers' compensation, public liability).	8.1.4.2					
11	Financial and resource capacity to perform the work safely is assessed.	7.1 / 8.1.4.2					
C. Risk-Based Selection & Hazard Screening							
12	Hazards from the contracted activities and their interface with site operations are identified.	6.1.2.1					
13	OH&S risks and opportunities associated with the work are assessed and rated.	6.1.2.2					
14	Applicable legal and other requirements for the work are identified and communicated to bidders.	6.1.3					
15	Sub-contracting disclosed; flow-down of OH&S requirements to sub-contractors required.	8.1.4.2 / 8.1.4.3					
16	Selection decision documented, including justification where lowest-risk option not chosen.	8.1.4.1					

SECTION 2 — MOBILIZATION & PRE-START (controls, competence, induction & emergency arrangements before work begins)

#	Checklist Item / Requirement	ISO 45001 Clause	Yes	In Prog.	No	N/A	Evidence / Notes
D. Contract, Communication & Coordination							
17	OH&S requirements, expectations and KPIs are written into the contract / scope of work.	8.1.4.2					
18	Interfaces and coordination agreed where contractor and host activities overlap.	8.1.4.2					
19	Lines of communication, reporting and escalation defined (host / contractor / sub-contractors).	7.4					
20	Method statements / safe work procedures submitted, reviewed and accepted before work starts.	8.1.2					
21	Pre-start / kick-off meeting held and documented (scope, hazards, controls).	7.4 / 8.1.4.2					
E. Risk Assessment & Controls Verified							
22	Task-specific risk assessments / JSAs completed by the contractor and reviewed by the host.	6.1.2.2					
23	Controls follow the hierarchy of controls (eliminate, substitute, engineering, administrative, PPE).	8.1.2					
24	High-risk / permit activities identified (height, confined space, hot work, energized work, excavation, lifting).	8.1.2					
25	Permit-to-work and isolation / LOTO arrangements established for applicable activities.	8.1.2					
26	Plant, equipment and tools to be used are inspected, certified and fit for purpose.	7.1.3 / 8.1.2					
27	Hazardous substances declared; SDS provided and controls agreed.	8.1.2 / 7.4					
F. Competence, Induction & Awareness							
28	Site-specific OH&S induction delivered to all contractor personnel and attendance recorded.	7.3 / 7.2					
29	Worker competence/training for specific tasks verified (licences, tickets, certificates).	7.2					
30	Workers made aware of hazards, controls, their contribution to OH&S, and consequences of non-compliance.	7.3					
31	Mechanism for worker consultation and participation (incl. contractor workers) is in place.	5.4					
32	Required PPE specified, available, inspected and personnel trained in its use.	8.1.2					
G. Emergency Preparedness							
33	Contractor briefed on site emergency procedures, alarms, assembly points and evacuation routes.	8.2					
34	First-aid provision, emergency contacts and incident-reporting process communicated.	8.2 / 10.2					
35	Contractor-introduced emergency scenarios (e.g. hot-work fire, chemical spill) planned for.	8.2					
36	Need for emergency drill or rescue plan (e.g. confined-space / height rescue) confirmed.	8.2					

SECTION 3 — DURING WORK / ON-SITE (operational control, supervision, monitoring & incident management)

#	Checklist Item / Requirement	ISO 45001 Clause	Yes	In Prog.	No	N/A	Evidence / Notes
H. Operational Control & Supervision							
37	Work is carried out in accordance with approved method statements and risk assessments.	8.1.1					
38	Permits-to-work are issued, displayed, monitored and closed out as required.	8.1.2					
39	Adequate, competent supervision of contractor activities is provided and present.	8.1.1 / 5.3					
40	Site rules, exclusion zones, signage and traffic/pedestrian segregation are enforced.	8.1.2					
41	Changes to scope, methods, personnel or conditions are managed (management of change).	8.1.3					
42	Sub-contractors on site comply with the same OH&S requirements as the principal contractor.	8.1.4.3					
I. Monitoring, Inspection & Worker Participation							
43	Routine workplace / site inspections of contractor work are performed and recorded.	9.1.1					
44	Contractor OH&S performance monitored against agreed KPIs / leading indicators.	9.1.1					
45	Safety observations, toolbox talks and pre-task briefings conducted and documented.	7.3 / 9.1.1					
46	Workers (incl. contractor workers) can raise hazards / concerns without reprisal.	5.4					
47	Housekeeping, welfare facilities and working conditions maintained to standard.	7.1 / 8.1.2					
48	Compliance with legal and other requirements is periodically evaluated.	9.1.2					
J. Incident & Nonconformity Management							
49	Incidents, near-misses and unsafe acts/conditions reported, recorded and investigated.	10.2					
50	Corrective actions assigned, tracked to closure and verified for effectiveness.	10.2					
51	Stop-work authority is exercised when imminent danger is identified.	8.1.1 / 5.4					
52	Lessons learned communicated to relevant workers and parties.	7.4 / 10.2					
53	Non-compliances by the contractor are escalated and managed per the contract.	8.1.4.2 / 10.2					

SECTION 4 — CLOSE-OUT & EVALUATION (safe demobilization, performance review, records & improvement)

#	Checklist Item / Requirement	ISO 45001 Clause	Yes	In Prog.	No	N/A	Evidence / Notes
K. Demobilization & Handback							
54	All permits-to-work and isolations are closed out and equipment returned to a safe state.	8.1.2					
55	Work area cleared, made safe and handed back; temporary works removed.	8.1.2					
56	Contractor plant, equipment and hazardous materials removed from site.	8.1.2					
57	Handover documentation and any residual-risk information provided.	7.5 / 8.1.2					
L. Performance Evaluation & Records							
58	Contractor OH&S performance formally evaluated against contract requirements and KPIs.	9.1.1 / 8.1.4.2					
59	Final incident / injury statistics for the contract compiled and reviewed.	9.1.1					
60	Evaluation outcome recorded for future pre-qualification (approved vendor list updated).	8.1.4.2					
61	Results feed into management review inputs where significant.	9.3					
62	Documented information retained (inductions, permits, inspections, incidents).	7.5.3					
M. Continual Improvement							
63	Lessons learned captured and used to improve the contractor management process.	10.3					
64	Feedback provided to the contractor; debrief held where appropriate.	7.4 / 10.3					
65	Checklist and OH&S criteria updated based on outcomes for future contracts.	10.3					

ASSESSMENT SUMMARY & SIGN-OFF

Total items marked Yes		Total items marked No (open actions)	
Total items In Progress		Total items N/A	

Overall outcome	Cleared to proceed	Proceed with actions	Not cleared
Assessor name & signature			
Contractor representative & signature			
Date			
Next review date			

Disclaimer: This checklist is a generic management aid based on the structure of ISO 45001:2018. It is not a substitute for the standard itself, for legal advice, or for the judgment of a competent occupational health & safety professional. Tailor it to your jurisdiction, regulations and site-specific risks before use.

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Health & safety enquiries

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