

Define the work before you buy

A practical starting point for an operations leader, safety manager or procurement team.

01 Agree one scope

List sites, shifts, recurring work, initial backlog, field presence and the decisions your team will retain.

02 Compare the same commitment

Ask every provider to identify included work, exclusions, capacity, qualifications and all recurring and one-time costs.

03 Make follow-through visible

Give each action an owner and due date. Record what changed and how the team checked that it works.

Organization / business unit

Prepared by / role / date

Planning period and reason for reviewing support

Use the editable workbook for three-provider cost calculations and a 30-row action register.

Your workplace team confirms the scope, applicable requirements and decision authority. This planning aid does not replace a workplace assessment. Keep sensitive records in your approved system and reference them here.

Start a scope conversation: prevent-x.co/request-coverage-assessment

Scope worksheet

State the operating need and the deliverable you expect. Add an owner and acceptance criteria.

Sites, shifts and workforce

Facilities, work activities, employees, contractors and scheduling.

Recurring work and deliverables

Tasks, frequency, volume, meetings and records to be maintained.

Initial backlog and one-time work

Open findings, program updates, setup or time-limited projects.

Field presence, travel and specialist needs

Where someone must attend, how often, and which technical disciplines are needed.

Internal duties and decision authority

Who supplies records, approves changes, controls work and implements actions?

Systems, response and handover

Record access, escalation, response boundaries, change pricing and return of records.

Acceptance criteria and unresolved questions

What demonstrates delivery, who reviews it and what still needs a decision?

Related guide: prevent-x.co/guides/outsourced-ehs-department-cost

Provider comparison

Use the same scope and period. Unknown costs remain open questions. Enter zero only when confirmed.

Requirement / cost	Provider A	Provider B
Name / proposal reference		
Scope / period match		
Monthly service fee		
Monthly travel / software / specialists		
Monthly internal hours x hourly rate		
Other monthly costs		
Total monthly cost (sum above)		
Annual recurring cost (monthly x 12)		
One-time setup / backlog / other		
First-year total (annual + one-time)		

Included work, field presence and relevant qualifications

Exclusions, retained duties, contract term and exit

Open questions / decision owner / next step

Costs in USD. Include applicable taxes. Use the workbook for separate inputs and calculated totals.

Corrective action worksheet

Use one page per action. Keep the source, completion evidence and effectiveness review connected.

Action ID / site / source record / date

Finding and immediate or interim control

Cause or contributing factors and agreed lasting change

Accountable owner / due date / resources or approval needed

Completion evidence and date

Effectiveness reviewer / review date / normal-work check

Effectiveness result / closure decision / closure date

Changes, escalation or reason for reopening

Close after the agreed change is implemented and its effectiveness is reviewed. Keep sensitive details in the source record.

Related guide: prevent-x.co/guides/corrective-action-process