Contract Management Plan Template

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It’s tempting to take a “set it and forget it” approach to contract management and assume that because you’ve hired such a qualified vendor, they’ll be able to meet your objectives and complete the full project scope on time and within budget. You may only feel the need to worry about compliance activities, such as paying invoices or checking that insurance certificates are valid.

**A Contract Management Plan (also commonly known as a Contract Fact Sheet, Contract Administration Plan, or Contract Monitoring Plan) can create a user-friendly tool that makes sense of dense and lengthy contracts and shares the core elements of the contract in a manner that is clear, condensed, and accessible.** This tool can also enable contract managers or contract administrators to have a clear understanding of key deliverables, know core risks to mitigate, and foster clear communication.

You are encouraged to adapt this template to meet the needs of your government! Some fields may not be relevant or necessary to track for many contracts.

**Contract management plan template guidance key:**

Highlight = Instructions for developing content specific to this template. Delete before finalizing.

Highlight = Filler text that you should replace with information specific to your contract or jurisdiction.

*Remember to remove all highlights and brackets in the document before finalizing!*

## [Jurisdiction] Contract Management Plan

### Basic Contract Information

|  |  |  |  |
| --- | --- | --- | --- |
| **Contract Name** | [Contract title] | | |
| **Contract ID #** | [Contract ID] | | |
| **Contract Document Links:** | [Links or file paths to where critical contract documents can be found] | | |
| **Government Primary Contact(s)** | [Department point(s) of contact name, phone number, email address] | | |
| **Vendor Name** | [Legal name and doing business as (if applicable)] | | |
| **Vendor Primary Contact(s)** | [Vendor point(s) of contact name, phone number, email address] | | |
| **Start Date - End Date** | [XX-XX-XXXX through XX-XX-XXXX] | **Does the vendor hold other contracts with our entity?** | [YES/NO,  if YES list here with start/end dates] |
| **Option to Extend** | Yes  No | **Number and Type of Renewals** | [If there are extension options, note the date eligible for extension and required notice period.] |
| **Amendments** | [Update in the event of any amendment including additional scope requirements, funding, extensions, or other details that impact performance and oversight] | | |
| **Contract Value** | [Full value for entire contract term] | **Annual Budget** | [Annual value] |
| **Payment Structure** | Daily rate  Monthly invoice  Other cost reimbursement  Other  [Define payment requirements and schedule, ex: line-item budget with monthly invoicing, rate-based contract with quarterly audit, etc.] | | |

### Contract Administration Team Roles and Responsibilities

The following table lists individuals who have direct oversight responsibility to monitor whether the government receives and accepts the deliverables and services identified in the contract.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Email** | **Responsibilities** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Contract Scope, Schedule, and Deliverables

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Contract Scope and Key Activities** | | [1-2 sentences or bulleted list of what will be accomplished or provided through this contract. Can be repurposed from solicitation (RFP) scope of work or contract’s statement of work.] | | | | | |
| **Target Population** | | [Briefly describe the target population or catchment area to be served. If this is an internal services contract, please describe the department or staff that are primary users of the contract]. | | | | | |
| **Schedule** | | | | | |
| **Task/Activity Name** | | **Responsible Party** | **Duration** | **Start** | **Finish** |
| 1.0 Parent Task | | Name | No. Days | Start Date | Finish Date |
| 1.1 Sub Task | | Name | No. Days | Start Date | Finish Date |
| 1.2 Sub Task | | Name | No. Days | Start Date | Finish Date |
| 2.0 Parent Task | | Name | No. Days | Start Date | Finish Date |
| 2.1 Sub Task | | Name | No. Days | Start Date | Finish Date |

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Contract Deliverables** | | | |
| **Deliverable** | **Responsible Party** | **Due Date** | **Status** |
| Deliverable 1 |  |  |  |
| Deliverable 2 |  |  |  |
| Deliverable 3 |  |  |  |
| Deliverable 4 |  |  |  |
| Deliverable 5 |  |  |  |

### Performance Management Strategies

|  |  |
| --- | --- |
| **Outcomes** | [List the key outcomes to be achieved - “what will be the result of our investment?”] |
| **Monitoring and Oversight** | [Briefly describe the oversight plan -- include required reports, meetings, site visits, data collection, etc., and the frequency of each oversight method. Differentiate mandatory reporting versus performance reporting for your internal view of whether the project is on track.] |

The following table outlines the schedule of meetings required in the contract and other meetings needed to monitor the contract and the vendor’s performance.

|  |  |  |
| --- | --- | --- |
| **Scheduled Meetings** | | |
| **Meeting** | **Date/Frequency** | **Facilitator and Topics** |
| Contract Initiation/Kickoff | Once |  |
| Weekly Team Leads Meetings | Weekly |  |
| Monthly Performance Review or Performance Management Meetings | Monthly |  |
| Quarterly Executive Meeting | Quarterly |  |

The following table contains a list of required documents, reporting frequency, and content associated with internal monitoring and reporting of contract and the vendor’s performance.

|  |  |  |
| --- | --- | --- |
| **Contract Performance Reporting** | | |
| **Document Name and Content** | **Frequency** | **How Shared** |
| Weekly Status Report | Weekly | Verbal Update |
| Quarterly Narrative Report | Monthly | Uploaded to X System |
| Annual Summary Report | Annually | Presented in Y Meeting |
|  |  |  |

The following table lists the dashboard performance measures or metrics to track according to the contract.

|  |  |  |  |
| --- | --- | --- | --- |
| **Performance Measure** | **Method of Measurement** | **Frequency of Measurement** | **Targets, if applicable** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

### Risk Mitigation Strategies

Risk management includes: 1) identifying risks, 2) estimating the likelihood of and the potential impact of identified risks, and 3) determining how to manage, mitigate, or eliminate identified risks. The following table contains a list of project risks that require management.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Risk Description** | **Probability** | **Impact** | **Action** | **Status** |
|  | Improbable | Negligible |  |  |
|  | Probable | Critical |  |  |
|  | Very likely | Marginal |  |  |
|  |  | Catastrophic |  |  |

### Invoices and Payments

|  |  |  |  |
| --- | --- | --- | --- |
| **Invoices & Payments** | | | |
| **Invoice/Payment Description** | **Date of Invoice** | **Amount** | **Processed?** |
|  |  |  | Y/N |
|  |  |  | Y/N |
|  |  |  | Y/N |

**Optional Sections:**

## You may want to include the following sections if applicable to your contract:

* Data security and privacy considerations, or items or activities that require extra sensitivity.
* Communications and marketing approaches to advertise and tell the story of successes.
* Contract closeout or transition activities, including procedures or processes to ensure fulfillment of the contract requirements at closeout.
* Government assets, including property, services, or information, furnished to the vendor to fulfill the requirements of the contract.
* Strategies and procedures for managing the formal change control process to scope, cost, and schedule as well as mitigating variances to approved scope, cost, or schedule.
* Quality assurance requirements: the strategy for ensuring contract requirements conform to quality assurance provisions.
* Capacity building needs and supports that fulfill needs or gaps in qualifications of the vendor.

|  |
| --- |
| The [Procurement Excellence Network](https://www.procurementexcellencenetwork.org/) (PEN) is a free, online community for public sector leaders seeking to transform their jurisdiction’s procurement practices. It offers virtual trainings, tools, templates, and coaching, while building peer connections for leaders as they launch efforts to make procurement more strategic, fair, and innovative. PEN is an initiative of [Partners for Public Good](https://partnersforpublicgood.org/) (PPG), a 501(c)(3) non-profit organization that helps state and local governments use key operational levers—procurement, workforce, digital infrastructure, and budgeting—to drive public impact.  Partners for Public Good is grateful for support from Bloomberg Philanthropies.  © Copyright 2025 Partners for Public Good |