

Organisation [Name]

Department [Name]

Outsourcing Plan

**<Project Name>**

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*This template is based on PM² V3.0*

*For the latest version of this template please visit the* [*PM² Wiki*](https://webgate.ec.europa.eu/fpfis/wikis/x/RoB_Bw)

<*The PM² Methodology originated from the European Commission. Open PM² provides many guidelines and templates to facilitate the management and documentation of your projects.>*

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# Introduction

The objective of the outsourcing plan is to describe what products and/or services need to be outsourced outside the organization. This document identifies the procurement/contracting strategies that will be used, outlines the scope of products and/or services to be contracted, and identifies responsibilities for the full contract lifecycle.

# Procurement Description

## Procured Items

*<Identify the items that will be contracted and under what conditions.>*

## Training Requirements and Manuals

<Identify the needs for certain manuals or/and trainings.>

## Ownership Rights

*<Determine who retains the intellectual property rights or ownership of the final or interim deliverables after the completion of the contract.>*

## Compatibility Requirements

*<Identify any compatibility issues that may have an impact (e.g. hardware, software, quality or other). It is necessary to ensure that the deliverables of the contractor are compatible with what is being used for the rest of the project.>*

## Other Requirements

*<Identify any other requirements.>*

*<e.g. Access to Backup Copies - Possible updates to the software, and access to any application or data backup copies, should be considered. These points should be considered when signing the contract and should be included in the contract if possible.>*

# Procurement Method

## Method

*<Identify any constraints that may affect the contracting process (i.e. it might be an organizational policy to work with certain contractors which already have a framework agreement.)>*

*<Determine the method(s) by which new products may be obtained (i.e. lease/purchase, bid process). Other factors like availability time might be important in determining the method to be used.>*

## Schedule of Delivery

*<Provide schedule information for all the relevant contracting activities. This will ensure that the contractor(s) have resources available in order to meet the prepared timeline.>*

## Quality Management and Post Delivery Support

Describe the potential contractors' method (support) of handling quality issues, as well as the own corporate method. If a quality issues is reported after the deliverables are in operation, describe how the contractor will handle the problem.

# Evaluation criteria

## Criteria

*<List the evaluation criteria for contractors. This ensures that the contractor is selected on the basis of pre-set criteria and that a single person or group does not influence the decision. The criteria could include the following:*

* *Technical capability*
* *Quality of work*
* *Previous experience in similar projects*
* *Etc.>.*

## Technical Capabilities

*<If important, list any required technical capabilities separately in this section. The capabilities should be determined before evaluating the contractors. A detailed statement of requirements should be part of the contract (i.e. the website must be able to handle 1000 concurrent visitors).*

*For IT projects,* list any scalability needs for the system (in terms of users and data to handle). *Estimate data volumes to be handled after the system is running for several years. (I.e. after 3 years the system should support 4 million records).>*

# Governance

## Contractor Interface

*<Define who from the project team and organization unit can interface with the contractor(s).>  
<Define the organisation and the project governance.>*

## Responsibility for Signing

*<Outline the responsibility of who can sign the contract. Furthermore, note that there might be organization-level rules regarding contracting that might need to be adhered to. In contracts over a certain value, the involvement of legal and purchasing units might be necessary.>*

*<You can present this information in a RAM (RASCI) table.>*

## Responsibility for Approval

*<Define who will be approving the deliverables of the projects, timesheets, purchase orders etc.>*

*<You can present this information in a RAM (RASCI) table.>*

APPENDIX 1: References and Related Documents

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g. the location of the document or the publishing organisation).>

|  |  |  |
| --- | --- | --- |
| **ID** | **Reference or Related Document** | **Source or Link/Location** |
| 1 | *<Example of a related document>*  *<04.Project\_Handbook.XYZ.11-11-2013.V.1.0.docx>* | *<Example of a location>*  *< U:\METHODS\PM²@EC\Documents\>* |
| 2 | Project folder | *<Insert project folder location.>* |
| 3 |  |  |