
Subcontract Management Plan

for

<Project>

Version 1.0 draft 1

Prepared by <author>

<organization>

<date created>

<Change the footer and header text to reflect the correct copyright date, acquirer company name, and project name.>

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Revision History

Name	Date	Reason for Changes	Version
		initial draft	1.0 draft 1

<Note: This template contains guidance text, shown in italics. When creating a subcontract management plan from this template, remove the guidance text and insert your own specific information for the project. Use normal font, not italics.>

1. Overview

<Briefly describe the project being outsourced. Identify the supplier company. Describe any specific outsourcing issues or concerns that will require particular attention as part of managing the outsourced project.>

2. Abbreviations, Acronyms, and Definitions

<List any specialized terms or abbreviations and their definitions.>

3. Project Organization

3.1 Staffing

<Identify the individuals at the acquirer company who are participating in the outsourced project. The key roles will include the project manager, subcontract manager, technical lead, test lead, configuration management manager, quality assurance manager, and requirements analyst or product manager. If the project is a collaborative development effort between the supplier and acquirer, also identify the roles and individuals involved in doing the development and testing at the acquirer site.>

3.2 Interfaces to Supplier

<Identify the principal points of contact between the supplier and acquirer at the project management level (the acquirer's subcontract manager and the supplier's project manager), the senior management level, and the technical level.>

3.3 Decision-Making

<Describe who will make major project decisions, including scope change, issue and conflict resolution, final product acceptance, and the change control board. Describe the decision-making process that each will use, such as voting, consensus, unanimity, or delegation to an individual.>

4. Communication Plan

<Describe how periodic and event-driven communications will be handled with the supplier. Define the communication methods to be used, such as phone, e-mail, videoconference, face-to-face, and Web-based tools. Address the frequency, content, and format of face-to-face meetings, regular teleconference meetings, technical peer reviews, and management status reviews. Estimate and budget for the costs of these long-distance communication activities.>

5. Project Tracking and Oversight

5.1 Status Reporting

<State the expected frequency of written status reports from the supplier (weekly is best), to whom they are to be delivered, and the delivery mechanism (e-mail, fax, etc.). Describe the contents and organization of the status reports, perhaps by referring to a specific template to be used. Also describe internal status reporting that the subcontract manager will do within the acquirer company to project management and senior management. Indicate how the acquirer will monitor, evaluate, and use the status reports to identify issues, monitor risks, and trigger necessary interactions with the supplier. State how the supplier is to provide updated plans if necessary.>

5.2 Metrics

<Define the project status tracking metrics and charts that the supplier is to supply and the frequency of metrics reporting, if they are not included in the regularly scheduled status reports. Common metrics categories are:

- *Size (lines of code, function points, classes, number of requirements, size of executables)*
- *Time (planned and actual duration between milestones)*
- *Cost (planned and actual expenditures to date)*
- *Defects (number of defects found, open, and closed; defect origin and classification)*
- *Status (percent of requirements implemented and verified; satisfaction of performance or other quality goals)>*

5.3 Risk Management

<Identify the individual at the acquirer site who is responsible for managing risks on the project. This might be the subcontract manager. It is often a good idea to have someone other than the project manager coordinate risk management. Describe the risk management activities that the acquirer will perform to identify, document, analyze, prioritize, mitigate, and monitor risks throughout the project. Describe how the supplier is to report risks they identify and to provide updates on risk status as part of project status tracking.>

5.4 Commitment and Issue Tracking

<Describe how the project will document commitments and issues. Commitments need to be made explicit and tracked to closure. Issues need to be made visible, resolved, and tracked to closure. Unresolved issues might need to be escalated to senior management. If the escalation process is not described in other project documents (e.g., the statement of work or contract), describe it here.>

5.5 Senior Management Review

<Indicate the frequency, purpose, participants, and contents of periodic senior management reviews. Define the conditions that will trigger special senior management reviews or meetings between the acquirer and supplier senior managers.>

6. Change Management

<Describe how requested changes in requirements, designs, technologies, or other aspects of the project are to be submitted and evaluated. It is preferable for the supplier to have access to the acquirer's current change control tool so that all changes are handled similarly, regardless of their origin. Refer to the applicable change control process that will be followed. Identify the change control board that will evaluate and make decisions about proposed changes.>

7. Product Acceptance and Transition

7.1 Product Acceptance

<Unless they are documented elsewhere, summarize the activities and procedures for evaluating and accepting deliverables from the supplier. Indicate how issues and defects from the acceptance activities are to be reported to the subcontract manager and to the supplier. State how final acceptance of the deliverables is to be reported so the contract can be brought to a close and final payment made to the supplier. Identify the individuals who are responsible for performing all product acceptance activities.>

7.2 Transition to Support

<Identify the organization that will be responsible for supporting the delivered product. Describe the steps involved in transitioning the accepted deliverables into the acquirer's environment, into production operation, to manufacturing, or to the ultimate customer. Show the anticipated schedule and effort for these transition activities. Identify the individuals who are responsible for executing the transition activities.>

7.3 Requirements Tracing

<Describe the way you wish to view requirements traceability information that will indicate where each functional requirement was addressed in design, code, and test elements of the system. Indicate the requirements traceability tool to be used, what traceability reports are to be generated, by whom, and at what frequency. State who is responsible for providing each kind of traceability information; both the supplier and the acquirer will likely contribute some of the data.>