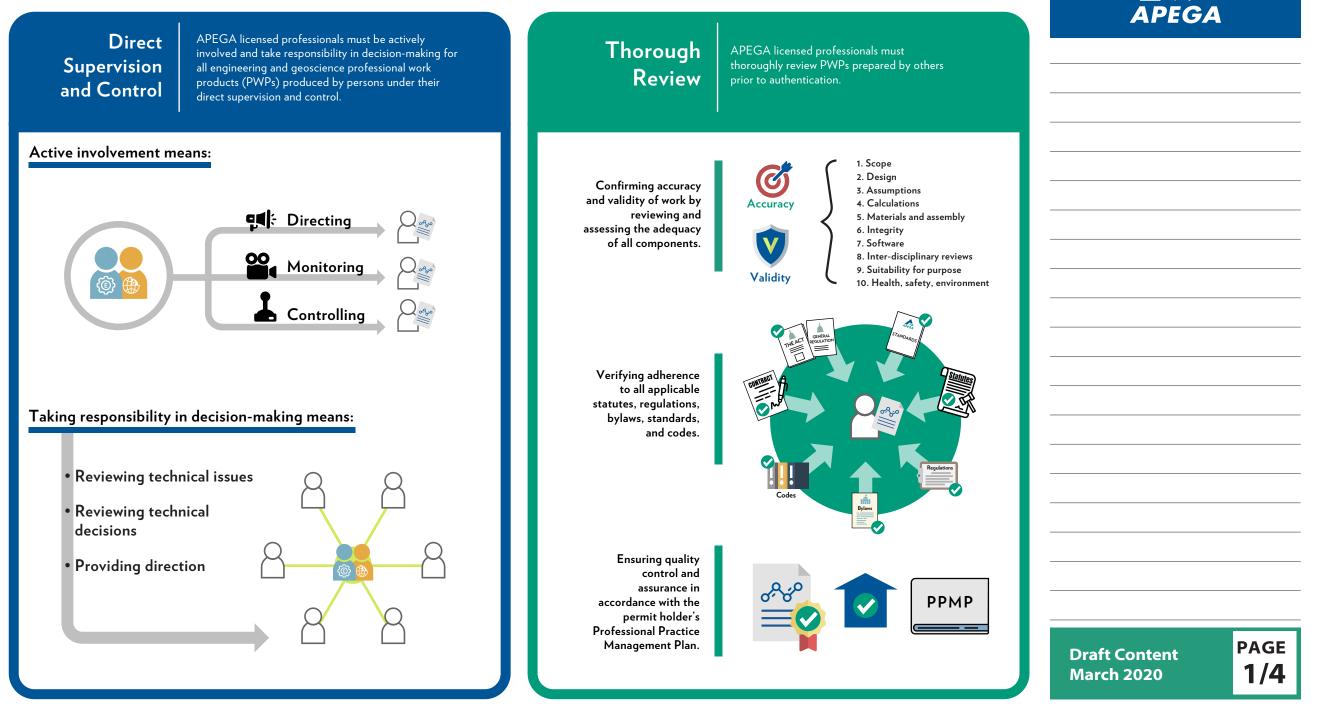
APEGA Practice Standard: Relying on the Work of Others and Outsourcing

This infographic summarizes key aspects of the draft standard *Relying on the Work of Others and Outsourcing*. For details, please refer to the draft standard.



APEGA Practice Standard: Relying on the Work of Others and Outsourcing

Outsourcing to an APEGA Licensed Professional or Permit Holder

When outsourcing engineering or geoscience work to an APEGA licensed professional or permit holder not working under the same Permit to Practice, the licensed professional or permit holder must apply the following due diligence process.



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Outsourcing Process Elements Quality Interface Communication Management B Selection 3 of Compliance Assurance of Change Management Process **Obligations** Process Process Process **Documented process** Ensure the outsourced Ensure the outsourced **Documented management** Documented interface entity understands of change process that evaluates: entity has quality management process compliance obligations, management processes to ensure that technical to ensure integrated • Competency to provide that meet or exceed changes to previously systems meet applicable the standard and quality of includina: standards defined in the authenticated PWPs are requirements when multiple services required Statutes permit holder's Professional authenticated and validated. • Regulations outsourced entities are • Previous experience Practice Management Plan including changes made Bylaws • Professional and ethical involved. (PPMP). during field implementations. • Standards reputation • Codes • Quality control processes • Project-specific requirements (e.q., regulatory **Draft Content** approvals or permits) **March 2020**

APEGA Practice Standard: Relying on the Work of Others and Outsourcing

Outsourcing to an Entity Not Licensed by APEGA

When outsourcing engineering or geoscience work to an entity not licensed by APEGA, the licensed professional or permit holder must develop and follow an outsourcing plan for each service. Each outsourcing plan must contain the following seven elements.

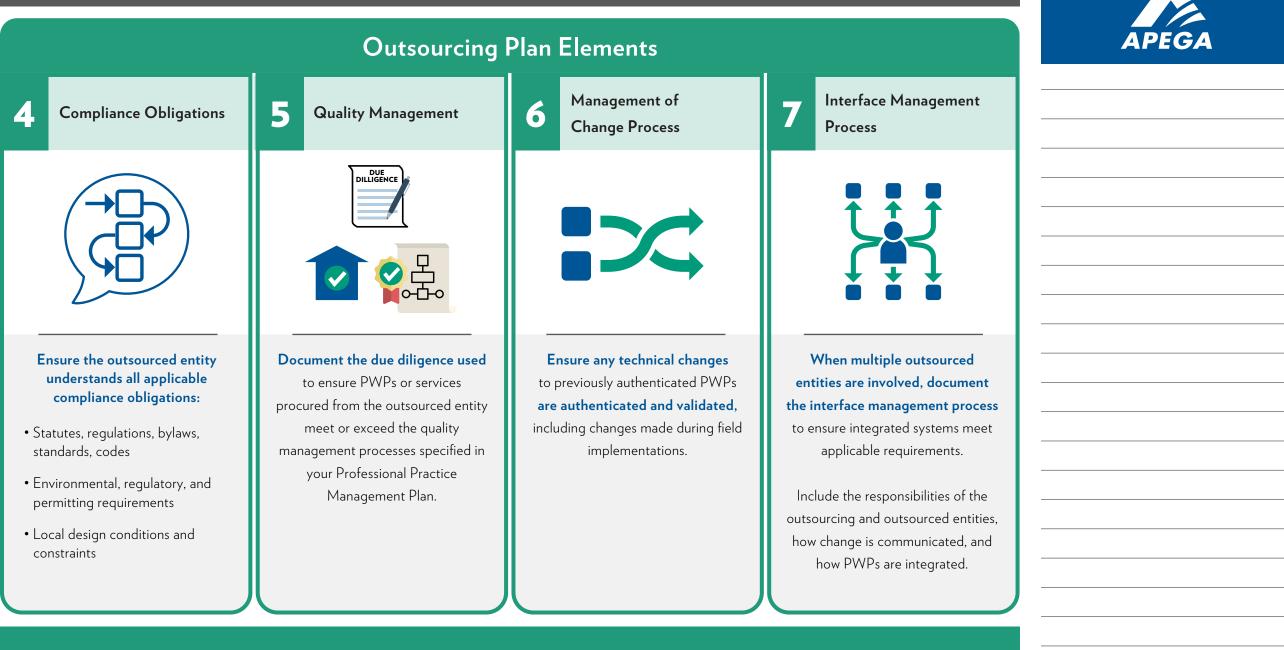


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Outsourcing Plan Elements Assignment of Competent Licensed 3 **Selection Process** Scope of Work **Professionals and Responsible Members** Assigned licensed professionals must: • Oversee the outsourced entity • Ensure proper authentication and validation of PWPs • Be experienced and competent in the required engineering or geoscience discipline and the {©}[™] scope of professional services • Be aware of design criteria and limitations Demonstrate the evaluation of: The scope of work must include: If an outsourcing entity does not have the expertise necessary to take professional responsibility for PWPs, • Description of the professional • Competency to provide the required due diligence can be demonstrated using one standard and quality of professional services needed of the following approaches: services • Description of the project work scope • Relevant experience • Train your licensed professionals in the required area of expertise • List of the PWPs • Professional and ethical reputation • Have the outsourced entity obtain a Permit to Practice from APEGA • Processes for quality control and • List of the documents that the Outsource authentication and validation to another APEGA assurance outsourced entity will rely on licensed entity • Knowledge of provincial and national regulations, APEGA standards, and • Use a recognized subject matter expert and conduct other applicable codes and regulations a thorough review **Draft Content**



To provide feedback on the draft standard, *Relying on the Work of Others and Outsourcing*: Email: standards@apega.ca

