Strategic Procurement, Contracts and Claims

GExperts Learning Academy | PC-X15 | PC | 12-18 weeks

Course overview

12-18 weeks PC programme focused on Strategic Procurement, Contracts and Claims, using energy-sector cases and applied decisions.

Designed for: Experienced professionals

Learning outcomes

- Explain core principles and terminology for Strategic Procurement, Contracts and Claims.
- Interpret an applied case using evidence and stated assumptions.
- Identify risks, safeguards, role boundaries and escalation points.
- Prepare a clear recommendation for a multidisciplinary audience.

Course guide

Work through each module objective, lesson and teaching note, complete the applied activity and assessment, then use the separate Academy practice page for practice questions and answer feedback.

Separate practice questions:
https://www.globalexpertsconsultoria.com/training/academy/courses/questions/?course=PC-X15

Academic and certification status

Draft learning resource for study and review. It does not confer accreditation, external certification, a regulated qualification, professional licence, safety-critical competence or site authorisation. Confirm approvals, current laws, standards, approved procedures and awarding-body requirements before delivery.

Module 1: Procurement and supplier qualification

Learning objectives

- Explain procurement and supplier qualification, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Procurement and supplier qualification
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Procurement translates a defined need into sourcing, evaluation, award and contract management. Separate mandatory eligibility, technical acceptance and commercial comparison. Clear specifications and evaluation criteria should exist before bids are opened.

Decision logic. Manage conflicts, confidentiality and fair treatment. Lowest price may not be lowest evaluated cost if quality, delivery and lifecycle support differ. Document decisions and follow delegated authority; this classroom exercise awards no real contracts.

Worked example. A low bid excludes offshore mobilisation while another includes it.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Normalise three fictional bids and prepare an evaluation recommendation.

Model answer guide. Compare like-for-like scope, clarify exclusions and include risk with an auditable decision basis.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Normalise three fictional bids and prepare an evaluation recommendation.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 2: Contract strategy and risk allocation

Learning objectives

- Explain contract strategy and risk allocation, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Contract strategy and risk allocation
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Contracts define scope, deliverables, payment, acceptance, change and remedies. Lump sum, reimbursable and target-cost arrangements allocate uncertainty differently. Begin with scope maturity and market capability rather than choosing a familiar contract label.

Decision logic. Risk should be allocated to parties able to manage it, with realistic pricing and assurance. Unclear interfaces create disputes despite detailed clauses. Actual indemnity, liability, insurance and governing-law terms require qualified legal and commercial review.

Worked example. A supplier prices an undefined offshore interface as an exclusion; the owner's total risk remains unresolved.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Draft a scope and interface schedule for a fictional package.

Model answer guide. Include deliverables, acceptance evidence, owner interfaces, change control and exclusions.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Draft a scope and interface schedule for a fictional package.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 3: Contract and vendor performance

Learning objectives

- Explain contract and vendor performance, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Contract and vendor performance
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Vendor management checks delivery against agreed scope, quality, schedule, HSE and commercial terms. Define measurable acceptance criteria and evidence. Relationship quality helps but does not replace objective verification.

Decision logic. Use proportionate reviews, corrective actions and escalation. Indicators can conflict: on-time delivery of defective items is poor performance. Changes require controlled agreement. Preserve records needed for payment, warranty and learning.

Worked example. A supplier meets delivery dates but repeatedly submits incomplete quality dossiers.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Develop a balanced performance scorecard and corrective-action request.

Model answer guide. Include first-time quality, documentation, delivery and action effectiveness with accountable dates.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Develop a balanced performance scorecard and corrective-action request.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 4: Strategic Procurement, Contracts and Claims: Evidence and Decis

Learning objectives

- Explain strategic procurement, contracts and claims: evidence and decision gates, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Strategic Procurement, Contracts and Claims: Evidence and Decision Gates
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Strategic Procurement, Contracts and Claims: Evidence and Decision Gates describes a practical part of Strategic Procurement, Contracts and Claims. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for strategic procurement, contracts and claims: evidence and decision gates. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans strategic procurement, contracts and claims: evidence and decision gates while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for strategic procurement, contracts and claims: evidence and decision gates: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for strategic procurement, contracts and claims: evidence and decision gates: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 5: Strategic Procurement, Contracts and Claims: Work Planning

Learning objectives

- Explain strategic procurement, contracts and claims: work planning, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Strategic Procurement, Contracts and Claims: Work Planning
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Strategic Procurement, Contracts and Claims: Work Planning describes a practical part of Strategic Procurement, Contracts and Claims. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for strategic procurement, contracts and claims: work planning. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans strategic procurement, contracts and claims: work planning while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for strategic procurement, contracts and claims: work planning: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for strategic procurement, contracts and claims: work planning: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 6: Project quality and acceptance

Learning objectives

- Explain project quality and acceptance, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Project quality and acceptance
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Quality planning defines requirements, methods and evidence for conformance. Assurance evaluates the system; control checks outputs. Inspection and test plans use hold and witness points appropriate to consequence and scope.

Decision logic. Trace requirements through supplier records, fabrication, testing and handover. A test result must identify what was tested and against which criterion. Do not invent acceptance limits from generic training notes. Nonconformities require controlled disposition.

Worked example. A certificate reports a successful test but omits item identification and the acceptance basis.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Review the fictional dossier and write a nonconformity and closure requirement.

Model answer guide. Require traceable identity, approved criteria, valid method and authorised disposition.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Review the fictional dossier and write a nonconformity and closure requirement.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 7: Risk assessment and uncertainty management

Learning objectives

- Explain risk assessment and uncertainty management, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Risk assessment and uncertainty management
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Define the activity and potential harm, identify hazards, evaluate existing controls, then decide further controls and ownership. A risk matrix supports prioritisation but does not prove a risk is tolerable. Include affected people and changing conditions.

Decision logic. Test whether controls are present and effective. Residual risk should be reassessed after control implementation, not merely after a promise. Escalate high-consequence uncertainty for competent review. Project risk also includes schedule, cost and opportunity effects.

Worked example. A permit lists a barrier that has not yet been installed. The claimed residual risk is premature.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Complete a risk register with cause, event, consequence, control, owner and verification.

Model answer guide. Keep hazard and consequence distinct and require evidence before taking control credit.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Complete a risk register with cause, event, consequence, control, owner and verification.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 8: Local content and national value

Learning objectives

- Explain local content and national value, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Local content and national value
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Local content can include employment, skills, supplier participation and durable industrial capability. Distinguish domestic ownership, local expenditure and actual value retained locally. A purchase from a locally registered importer may contain little domestic production.

Decision logic. Measure outcomes with a defined boundary, baseline and evidence. Avoid assuming a proposed policy target is current law. Supplier development must protect quality and safety while building realistic capacity and fair access.

Worked example. A fictional USD 1 million local invoice contains USD 850,000 imported equipment and USD 150,000 local services.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Calculate the local-service share and propose more meaningful indicators.

Model answer guide. Fifteen percent in this simplified boundary; employment, skills and retained value need separate evidence.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Calculate the local-service share and propose more meaningful indicators.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 9: Safety and project leadership

Learning objectives

- Explain safety and project leadership, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Safety and project leadership
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Leadership sets priorities through decisions, resources and response to bad news. Explain the difference between stated values and incentives that reward unsafe shortcuts. Leaders need clear delegation, listening and evidence-based challenge.

Decision logic. Use leading indicators tied to important barriers and delivery outcomes. Review overdue actions and organisational capacity, not just aggregate counts. Encourage escalation and resolve conflicting objectives openly. Authority remains accountable even when tasks are delegated.

Worked example. A manager requests schedule recovery while critical tests are incomplete. The team must resolve priorities explicitly.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Write a leadership response and a 30-day improvement plan.

Model answer guide. Require safe sequencing, resources, action owners and follow-up; do not reward concealment of incomplete work.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Write a leadership response and a 30-day improvement plan.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Module 10: Strategic Procurement, Contracts and Claims: Competence Revie

Learning objectives

- Explain strategic procurement, contracts and claims: competence review, interpret a case, select appropriate controls and justify a documented decision.

Lessons

1. Purpose and key terms of Strategic Procurement, Contracts and Claims: Competence Review
2. Systems and operating context
3. Evidence, assumptions and decision gates
4. Hazards, safeguards and escalation
5. Applied case: Strategic Procurement, Contracts and Claims

Detailed teaching notes

Teaching notes

Core explanation. Strategic Procurement, Contracts and Claims: Competence Review describes a practical part of Strategic Procurement, Contracts and Claims. Learners connect the principles to asset performance, people, operational risk, project value and local context.

Decision logic. Review the objective, evidence, limits, interfaces and applicable controls for strategic procurement, contracts and claims: competence review. Decisions require current information, role-appropriate authority, competent review and documented assumptions.

Worked example. Use an applied Namibia-relevant case in which a team plans strategic procurement, contracts and claims: competence review while balancing safety, integrity, schedule, cost, environmental protection and local capability.

Facilitator prompts. Ask learners to distinguish verified facts from assumptions, identify who has decision authority, name stop-work triggers and state what evidence could change their recommendation. Compare technical, HSE, commercial and community perspectives.

Activity. Prepare a decision brief for strategic procurement, contracts and claims: competence review: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Model answer guide. A sound response defines scope; uses current, traceable evidence; applies approved requirements and controls; records assumptions; assigns competent owners; checks interfaces; and communicates a measurable decision with an escalation path.

Assessment evidence. Score accuracy (30%), use of evidence (20%), safeguards (20%), analysis (20%) and communication (10%).

Applied activity

Prepare a decision brief for strategic procurement, contracts and claims: competence review: scope, evidence, assumptions, hazards, safeguards, owner, decision gate and escalation trigger.

Assessment

Formative: 10-question practice quiz with answer feedback

Summative: Applied decision brief or practical case assessed against the rubric; proposed pass mark 70%, subject to academic approval.

Practice

Use the separate Academy practice questions and answer key page for this module.

Facilitator close-out and resources

Facilitator close-out

Record attendance, assessment evidence, learner support needs, incidents and improvement actions according to approved provider processes. Do not sign learners off for regulated or safety-critical work without the authorised assessment and certification route.

Resources and references

- Supplied GExperts/IUM reference materials; verify reuse rights and currentness.
- Current applicable Namibian legislation, standards and approved site procedures supplied by the provider.
- Case worksheet and instructor slides must be produced and reviewed before course release.