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COURSE BROCHURE

# Advanced Maintenance Contracting and Outsourcing Training Course

11 – 22 April 2027
Online

# Advanced Maintenance Contracting and Outsourcing Training Course

**Ref:** 401_14249 **Date:** 11 – 22 April 2027 **Location:** Online **Fees:** 5200 GBP

Advanced Maintenance Contracting and Outsourcing is a 2-week training course for maintenance managers, contract engineers and procurement specialists who decide which maintenance services to buy, how to pay for them and how to hold contractors to account, ending with a Maintenance Service Agreement Scope. Plants now buy a growing share of craft labour, specialist repairs and inspection from outside firms. Jupiter Prime Training offers this course for those who shape and police these agreements.

## Why Maintenance Contracting and Outsourcing Matter Now

Outsourced maintenance is shaped by three groups at once: finance teams pressing to convert fixed headcount into variable spend, specialist service firms offering availability-based deals for complex equipment, and safety leaders who know that contractor crews carry a large share of site incidents. Owners who contract well gain flexible capacity and specialist skill without losing control of asset condition; owners who contract badly pay for hours rather than results and lose the knowledge of their own plant. The course draws on EN 13306 to define maintenance work types consistently in scopes, and on ISO 55001 to keep outsourced services tied to asset objectives.

## Who Gains Most from Maintenance Contracting and Outsourcing

- Managers who decide which maintenance services stay in-house and which are bought
- Contract engineers who write scopes of work and technical specifications
- Procurement specialists who run tenders and negotiate commercial terms
- Contract holders who supervise contractor performance on site
- Leads who manage contractor safety, permits and site induction

An owner organisation gains most when its maintenance manager, a contract engineer and a procurement specialist attend together and agree one sourcing and contract approach.

## Maintenance Contracting and Outsourcing Capabilities

Participants learn to buy outcomes rather than hours, writing scopes, payment terms and service levels that a contractor can price and an owner can enforce.

- Assess make-or-buy options for each maintenance service — the outsourcing decision put to senior leadership
- Weigh lump-sum, unit-rate, reimbursable and performance-based models — the commercial structure of each contract
- Specify a scope of work with deliverables, exclusions and interfaces — the contractor pricing the tender
- Design a weighted tender evaluation matrix — the procurement committee awarding the contract
- Build a contractor scorecard with service levels and incentives — monthly performance meetings
- Apply variation, claim and close-out procedures — final account settlement and lessons learned

## Key Maintenance Contracting and Outsourcing Terms

- Scope of work — the document stating what the contractor must deliver, to what standard, with which exclusions and interfaces.
- Performance-based contract — an agreement that pays the contractor partly or wholly against measured results such as equipment availability.
- Service level agreement — measurable targets for response, completion and quality that a contractor commits to meet.
- Unit-rate contract — a payment basis where defined tasks or hours are priced individually and paid by quantity used.
- Variation order — a formal instruction that changes the agreed scope, price or timing of a contract.
- Contract close-out — the steps that settle final accounts, return documents and record lessons when a contract ends.

## Maintenance Contracting and Outsourcing Day by Day

### Day 1: The Outsourcing Landscape

- Maintenance Service Market Map — Craft Labour, Specialists and Original Manufacturers
- Core Versus Non-Core Capability Analysis — What the Owner Must Keep
- Outsourcing Risk Register — Knowledge Loss, Dependency and Safety Exposure
- EN 13306 Work Types in Contracts — Consistent Scope Language
- Stakeholder Roles in Sourcing — Maintenance, Procurement, Legal and Finance

### Day 2: Make-or-Buy Decisions

- Total Cost of Ownership Comparison — In-House Crews Versus Contract Services
- Capacity Peak Analysis — Shutdowns, Campaign Work and Base Load
- Specialist Skill Availability — Rotating Equipment, Electrical and Inspection Services
- Sourcing Strategy Matrix — Matching Service Type to Contract Approach
- Business Case for Outsourcing — Presenting Options to Leadership

## Day 3: Contract Models and Payment Terms

- Lump-Sum and Fixed-Price Contracts — Where Scope Is Stable
- Unit-Rate and Schedule of Rates Contracts — Flexible Call-Off Work
- Reimbursable and Cost-Plus Contracts — Controlling Open-Ended Spend
- Performance-Based and Availability Contracts — Paying for Results
- Framework and Term Agreements — Multi-Year Service Relationships

## Day 4: Writing the Scope of Work

- Scope Structure and Deliverables List — What Exactly Is Being Bought
- Technical Specifications and Standards — Workmanship and Testing Requirements
- Exclusions and Owner-Supplied Items — Avoiding Gaps and Overlaps
- Interface Matrix — Responsibilities Between Owner, Contractor and Third Parties
- Asset Data and Reporting Requirements — CMMS Updates by the Contractor

## Day 5: Service Levels and Incentives

- Service Level Agreement Design — Response, Completion and Quality Targets
- Key Performance Indicator Selection — Measurable and Within Contractor Control
- Incentive and Penalty Mechanisms — Bonus, Pain-Share and Gain-Share Formulas
- Availability Guarantees for Critical Equipment — Measurement and Exceptions
- Baseline Setting Before Award — Fair Targets From Historical Data

## Day 6: Tendering and Evaluation

- Prequalification Questionnaire — Capability, Safety Record and Financial Strength
- Invitation to Tender Package — Instructions, Pricing Schedules and Draft Contract
- Weighted Evaluation Matrix — Technical and Commercial Scoring
- Clarification and Bid Normalisation — Comparing Offers Fairly
- Award Recommendation Report — Justifying the Selected Contractor

## Day 7: Contract Risk and Terms

- Risk Allocation Clauses — Liability, Indemnity and Insurance
- Warranty and Defects Liability Terms — Rework at Contractor Cost
- Intellectual Property and Data Ownership — Drawings, Procedures and Records
- Termination and Step-In Rights — Protecting Continuity of Service
- Negotiation Planning — Priorities, Concessions and Walk-Away Points

## Day 8: Mobilisation and Site Control

- Mobilisation Plan — Personnel, Equipment and Access Approvals
- Contractor Safety Management — Induction, Permits and Supervision
- Owner Contract Holder Role — Day-to-Day Instruction and Acceptance
- Work Order and Timesheet Verification — Paying Only for Delivered Work
- Knowledge Retention Measures — Keeping Plant Know-How in the Owner Team

## Day 9: Performance, Variations and Close-Out

- Contractor Scorecard Reviews — Monthly Meetings and Corrective Plans
- Variation Order Procedure — Pricing, Approval and Records
- Claims Handling and Dispute Avoidance — Early Warning and Escalation Steps
- Contract Close-Out Checklist — Final Account, Documents and Demobilisation
- Re-Tender or Extend Decision — Using Performance Evidence

## Day 10: Practising the Maintenance Service Agreement Scope

- Make-or-Buy Findings Applied — Confirming the Service to Outsource
- Contract Model and Payment Terms Applied — Choosing the Commercial Basis
- Service Level and Incentive Design Applied — Setting Measurable Targets
- Evaluation and Risk Clauses Applied — Preparing for Tender
- Maintenance Service Agreement Scope Completion — Ready for Procurement Review

## Applying Maintenance Contracting and Outsourcing After the Course

- Run a make-or-buy review of one maintenance service using total cost of ownership and capacity peak analysis.
- Rewrite the scorecard of one existing contract so that every indicator is measurable and within the contractor's control.

## Maintenance Contracting and Outsourcing Questions FAQ

### What is advanced maintenance contracting and outsourcing and why does it matter now?

Maintenance contracting and outsourcing is the practice of deciding which maintenance services to buy and structuring contracts that deliver results. It matters now because utilities, refineries and manufacturing sites rely more on contractors, and poorly written scopes lead to disputes, cost overruns and lost plant knowledge.

### Which roles gain most from advanced maintenance contracting and outsourcing?

Maintenance managers, contract engineers and procurement specialists gain most. Together they decide what to outsource, write the scope, run the tender and supervise delivery, so shared methods for contract models and service levels prevent gaps between technical and commercial teams.

### How does advanced maintenance contracting and outsourcing differ from a general contract management course?

It focuses on maintenance services. A general contract management course covers legal and commercial principles for any purchase; here participants write maintenance scopes, design availability and response targets and control contractor crews on a working plant.

## What do you bring back from advanced maintenance contracting and outsourcing training?

You bring back a draft scope and commercial structure for one maintenance service. It includes the make-or-buy rationale, chosen contract model, service levels with incentives, evaluation criteria and key risk clauses ready for procurement review.

## Maintenance Contracting and Outsourcing: The Way Forward

The Maintenance Service Agreement Scope gives procurement and maintenance a shared, priceable definition of one outsourced service. Its first decision is which contract model goes to tender. Contract engineers and contract holders use it during tendering and supervision. After the first quarter of the contract, revisit the service levels against actual performance to adjust incentives fairly.