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COURSE BROCHURE

Advanced Source-to-Contract Procurement Training Course

28 February – 11 March 2027
Online

Advanced Source-to-Contract Procurement Training Course

Ref: 439_15794 **Date:** 28 February – 11 March 2027 **Location:** Online **Fees:** 3200 GBP

Source-to-Contract Procurement is an advanced 2-week training course for procurement and contracts managers, contract administrators and project commercial staff, built around one work product: a Source-to-Contract Lifecycle File for a major purchase, carrying the tender pack, award rationale, signed terms, change log and close-out record. Commercial exposure now sits as much in poorly drafted terms and unmanaged variations as in the price itself. Jupiter Prime Training built this course for the people who carry a purchase from invitation to final account.

Why Source-to-Contract Procurement Matters Now

Three pressures make the journey from tender to close-out harder to control. Suppliers price risk more aggressively when inflation, lead times and capacity are uncertain, so the choice of contract type and pricing mechanism decides who absorbs shocks. Project sponsors and finance teams expect variations and claims to be evaluated quickly and defensibly. And auditors examine whether the contract actually awarded matches the tender that was evaluated. Organisations that connect tendering to contract control avoid leakage, disputes and late deliveries; those that hand over a signed contract and walk away discover the gaps only when costs escalate. The course follows one purchase through each gate, using standard forms of contract as reference points.

Who Gains Most from Source-to-Contract Procurement

- Managers who own tender strategy and contract award for major purchases
- Administrators who maintain contract records, notices and change logs
- Commercial staff who price variations and assess supplier claims on projects
- Specialists who draft or negotiate terms, warranties and liability clauses
- Leads who run supplier performance reviews and contract close-out

A commercial group from one organisation, combining tendering, contract administration and project cost control, gains most when its members attend together and agree one file standard for every major award.

Source-to-Contract Procurement Capabilities

Each outcome strengthens a hand-over point where value is usually lost between the tender stage and the final account.

- Specify a tender pack with conditions, scope, pricing schedule and evaluation model — tender committees
- Weigh fixed price, reimbursable and target cost models for each purchase — budget owners
- Assess risk allocation in liability, warranty and termination clauses — legal reviewers
- Build a contract mobilisation and administration plan with notice routes — contract owners

- Calculate the value of variations and test the merit of supplier claims — project sponsors
- Design a close-out checklist covering final account, retentions and lessons — finance controllers

Key Source-to-Contract Procurement Terms

- Source-to-contract — the stages from identifying a need and running a tender through to a signed, mobilised contract.
- Pricing schedule — the structured form in which bidders price items, rates and lump sums so offers can be compared.
- Target cost contract — a pricing model where savings or overruns against an agreed target are shared between buyer and supplier.
- Variation — a formal change to scope, quantity, timing or specification after award, valued under the contract's rules.
- Liquidated damages — a pre-agreed sum payable for a defined breach, most often late completion or delivery.
- Retention — a portion of each payment held back until defects are corrected or the warranty period ends.

Source-to-Contract Procurement Day by Day

Day 1: The Source-to-Contract Journey

- Source-to-Contract Stage Map — Gates, Owners and Hand-Overs
- Commercial Leakage Points — Where Value Is Lost After Award
- Purchase Risk Profiling — Complexity, Value and Market Conditions
- Roles of Procurement, Legal and Project Teams — Accountability Lines
- Contract File Standard — Records Required at Each Gate

Day 2: Building the Tender Pack

- Instructions to Bidders — Clarification and Submission Rules
- Scope of Supply and Service Description — Measurable Deliverables
- Pricing Schedule Design — Rates, Lump Sums and Provisional Items
- Draft Conditions of Contract Issued With Tender — Bid Comparability
- Evaluation Model Disclosure — Criteria, Weightings and Thresholds

Day 3: Contract Types and Pricing Models

- Fixed Price Contracts — Certainty Versus Supplier Risk Premium
- Cost Reimbursable Contracts — Visibility and Audit Rights
- Target Cost and Pain-Gain Sharing — Incentive Alignment
- Framework Agreements and Call-Off Orders — Repeat Demand Coverage
- Price Adjustment and Indexation Clauses — Inflation Exposure

Day 4: Terms and Risk Allocation

- Liability Caps and Indemnities — Balancing Exposure Between Parties
- Warranty and Defects Liability Terms — Remedy Periods
- Liquidated Damages Clauses — Delay Compensation Levels
- Insurance and Security Instruments — Performance Bonds and Guarantees
- Termination and Suspension Rights — Exit Conditions

Day 5: Bid Evaluation and Award

- Commercial Bid Normalisation — Comparing Qualified Offers
- Technical and Commercial Scoring Consolidation — Award Ranking
- Post-Tender Clarification and Negotiation — Closing Gaps Lawfully
- Award Recommendation and Approval Record — Audit Trail
- Unsuccessful Bidder Debriefs — Feedback and Challenge Risk

Day 6: Contract Mobilisation and Administration

- Kick-Off Meeting Agenda — Roles, Notices and Reporting
- Contract Summary Sheet — Key Dates, Obligations and Limits
- Notice and Correspondence Register — Time-Bar Protection
- Payment Application and Certification Process — Cash Flow Control
- Document Control for Contracts — Version and Approval Discipline

Day 7: Variations and Change Control

- Change Request Workflow — Instruction, Valuation and Approval
- Variation Valuation Methods — Contract Rates, Fair Rates and Quotations
- Change Log and Budget Impact Tracking — Forecast Final Cost
- Scope Creep Indicators — Early Warning to Sponsors
- Delegated Authority for Variations — Approval Thresholds

Day 8: Claims and Dispute Avoidance

- Claim Notification Requirements — Contractual Time Limits
- Delay Claim Assessment — Cause, Effect and Entitlement
- Disruption and Cost Claim Evidence — Records That Support Merit
- Negotiated Settlement Strategy — Commercial Trade-Off Choices
- Escalation Ladder and Alternative Dispute Resolution — Mediation Options

Day 9: Supplier Performance and Close-Out

- Contract Key Performance Indicators — Service Credits and Remedies
- Supplier Performance Review Meetings — Corrective Action Agreement
- Final Account Agreement — Reconciling Payments and Variations
- Retention Release and Warranty Handover — Residual Obligations
- Contract Close-Out Report — Lessons for Future Tenders

Day 10: Practising the Source-to-Contract Lifecycle File

- Tender Pack Assembly — Applying Scope, Pricing Schedule and Evaluation Model
- Contract Type Selection Debate — Applying Pricing Model Trade-Offs
- Variation and Claim Simulation — Applying Valuation and Notice Rules
- Close-Out Review — Applying Final Account and Retention Steps
- Source-to-Contract Lifecycle File — Tender, Award, Change and Close-Out Records

Applying Source-to-Contract Procurement After the Course

- Audit one live contract against the contract file standard and fill missing records, starting with the notice register and change log.
- Review the pricing model of the next major tender and present a recommendation on fixed, reimbursable or target cost terms to the budget owner.

Source-to-Contract Procurement Questions FAQ

What is source-to-contract procurement, and why does it matter now?

It is the discipline of carrying a purchase from tender pack and award through mobilisation, change control and close-out. It matters now because volatile costs and supplier risk pricing make contract type, terms and variation control decisive for final cost.

Which roles gain most from source-to-contract procurement training?

Procurement and contracts managers, contract administrators and project commercial staff gain most. They build tender packs, choose pricing models, administer notices and variations, assess claims and agree final accounts.

How does source-to-contract procurement training differ from a contract law course?

A contract law course explains legal principles, formation and remedies. This course applies commercial practice: tender pack design, pricing models, risk allocation choices, mobilisation, variation valuation, claims evidence and close-out records for a real purchase.

What do you bring back from source-to-contract procurement training?

You bring back a lifecycle file template with a tender pack checklist, pricing model guide, contract summary sheet, notice register, change log and close-out checklist ready for your next major award.

Source-to-Contract Procurement: The Way Forward

The Source-to-Contract Lifecycle File first informs how the next major tender pack and pricing model are prepared. Contracts managers, administrators and project cost controllers maintain it together through award, change and close-out. After its first completed contract, revisit the variation and claim records to see which tender and drafting choices created avoidable change.