# COURSE OVERVIEW PM0381(SR1)
# Mastering Project Close-Out Procedures

**Course Title**
Mastering Project Close-Out Procedures


**Course Date/Venue**
Session 1: February 24-28, 2025/Fujairah Meeting Room, Grand Millennium Al Wahda Hotel, Abu Dhabi, UAE
Session 2: September 21-25, 2025/ Boardroom 1, Elite Byblos Hotel Al Barsha, Sheikh Zayed Road, Dubai, UAE


**Course Reference**
PM0381(SR1)

**Course Duration/Credits**
Five days/3.0 CEUs/30 PDHs

**Course Description**

***This hands-on, highly-interactive course includes various practical sessions and exercises. Theory learnt will be applied using our state-of-the-art simulators.***

This course is designed to provide participants with a detailed and up-to-date overview of plant documentation and project submittals. It covers the training competent contract and field administrators to manage time, cost, documentation and disputes. It focuses on the legal, technical and personal responsibilities involved in observation, supervision and coordination of onsite construction. It increases knowledge of construction practices and control techniques and develops skills in management, contract administration, decision making and, finally, contract close-out – all essential in administering the contract.

Further, this course will also discuss how to identify management responsibilities, develop your communication skills, learn effective administrative responsibilities, understand legal requirements, structure effective record keeping methods, and promote good organizational and contract close out procedures.

During this interactive course, participants will learn to carryout project documentation and control systems; define and identify the various types of records; perform proper communication during the construction phase; design the record forms and identify the essential elements and standard pre-printed forms; recognize the dispute and claim causes and their impact that includes suspension of work, re-sequencing of work, variation orders, etc.; employ claim and dispute management and prevention; perform substantial completion; and project hand over commissioning and handing over and substantial completion; prepare punch list and apply starting of systems; and apply practical problem-solving exercises based on typical site problems.

## Course Objectives

Upon the successful completion of this course, each participant will be able to:-

- Apply and gain an in-depth knowledge on plant documenattion and project submittals
- Carryout project documentation and control systems
- Define and identify the various types of records
- Perform proper communication among the participants during the construction phase
- Discuss organization of field administrator's record system and project control
- Design the record forms and identify the essential elements and standard pre-printed forms
- Recognize the dispute and claim causes and their impact that includes suspension of work, re-sequencing of work, variation orders, etc.
- Employ claim and dispute management and prevention
- Perform substantial completion and project hand over commissioning and handing over and substantial completion
- Prepare punch list and apply starting of systems
- Discuss the key principles of successful contracts
- Apply practical problem-solving exercises based on typical site problems

## Exclusive Smart Training Kit - H-STK®


*Participants of this course will receive the exclusive "Haward Smart Training Kit" (**H-STK®**). The **H-STK®** consists of a comprehensive set of technical content which includes **electronic version** of the couprse materials course conveniently saved in a **Tablet PC**.*

## Who Should Attend

This course provides an overview of all significant aspects and considerations of plant documentation and project submittals for field administrators-in-training, field representatives of engineers, contractors, architects, owners and government agencies; construction inspectors, construction managers, project managers and others responsible for effective field administration in building construction.

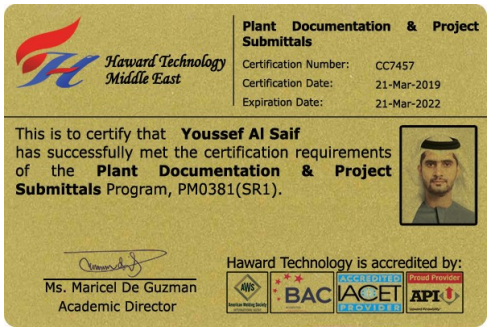
## Course Certificate(s)

(1) Internationally recognized Wall Competency Certificates and Plastic Wallet Card Certificates will be issued to participants who have successfully completed the course and passed the exam at the end of the course. Certificates are valid for 3 years.

**Recertification is FOC for a Lifetime.**

## Sample of Certificates

The following are samples of the certificates that will be awarded to course participants:-


(2) Official Transcript of Records will be provided to the successful delegates with the equivalent number of ANSI/IACET accredited Continuing Education Units (CEUs) earned during the course.

Haward Technology Middle East
Continuing Professional Development (HTME-CPD)

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## CEU Official Transcript of Records

**TOR Issuance Date:** 21-Mar-19

**HTME No.** PAR182287

**Participant Name:** Youssef Al Saif

| Program Ref. | Program Title | Program Date | No. of Contact Hours | CEU's |
|---|---|---|---|---|
| PM0381(SR1) | Plant Documentation & Project Submittals | March 17-21, 2019 | 30 | 3.0 |

Total No. of CEU's Earned as of TOR Issuance Date **3.0**

TRUE COPY

Maricel De Guzman
Academic Director

Haward Technology has been approved as an Authorized Provider by the International Association for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this approval, Haward Technology has demonstrated that it complies with the ANSI/IACET 1-2013 Standard which is widely recognized as the standard of good practice internationally. As a result of their Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for programs that qualify under the ANSI/IACET 1-2013 Standard.

Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking Continuing Education Units (CEUs) in accordance with the rules & regulations of the International Association for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

Haward Technology is accredited by

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**Course Certificate(s)**

Internationally recognized certificates will be issued to all participants of the course who completed a minimum of 80% of the total tuition hours.

**Certificate Accreditations**

Certificates are accredited by the following international accreditation organizations: -

- British Accreditation Council (BAC)

  Haward Technology is accredited by the **British Accreditation Council** for **Independent Further and Higher Education** as an **International Centre**. BAC is the British accrediting body responsible for setting standards within independent further and higher education sector in the UK and overseas. As a BAC-accredited international centre, Haward Technology meets all of the international higher education criteria and standards set by BAC.

- The International Accreditors for Continuing Education and Training (IACET - USA)

  Haward Technology is an Authorized Training Provider by the International Accreditors for Continuing Education and Training (IACET), 2201 Cooperative Way, Suite 600, Herndon, VA 20171, USA. In obtaining this authority, Haward Technology has demonstrated that it complies with the **ANSI/IACET 2018-1 Standard** which is widely recognized as the standard of good practice internationally. As a result of our Authorized Provider membership status, Haward Technology is authorized to offer IACET CEUs for its programs that qualify under the **ANSI/IACET 2018-1 Standard**.

  Haward Technology's courses meet the professional certification and continuing education requirements for participants seeking **Continuing Education Units** (CEUs) in accordance with the rules & regulations of the International Accreditors for Continuing Education & Training (IACET). IACET is an international authority that evaluates programs according to strict, research-based criteria and guidelines. The CEU is an internationally accepted uniform unit of measurement in qualified courses of continuing education.

  Haward Technology Middle East will award **3.0 CEUs** (Continuing Education Units) or **30 PDHs** (Professional Development Hours) for participants who completed the total tuition hours of this program. One CEU is equivalent to ten Professional Development Hours (PDHs) or ten contact hours of the participation in and completion of Haward Technology programs. A permanent record of a participant's involvement and awarding of CEU will be maintained by Haward Technology. Haward Technology will provide a copy of the participant's CEU and PDH Transcript of Records upon request.

**Course Instructor(s)**

This course will be conducted by the following instructor(s). However, we have the right to change the course instructor(s) prior to the course date and inform participants accordingly:

**Mr. Pete Du Plessis** is a **Senior Management & Financial Consultant** with over **40 years** of extensive experience. His expertise lies extensively in the areas of **Business Etiquette & Protocol**, **Contract** Management, **Contract Negotiation**, **Risk** Management & **Contractors Selection**, **Supply Chain** Management, **Supplier** Assessment, **Supplier** & **Contractors'** Management, **Supplier Claim** Management, **Effective Tendering** & **Supplier** Selection, **Supplier Relationship** Management, **Suppliers & Contractors** Management, **Suppliers** Assessment & Performance Measurement, Effective **Purchasing & Supplier** Selection, Essential Management of **Suppliers & Contractors**, **Contractors Agreements & SLAs**, **Contractors** Evaluation, **Budgeting & Forecasting** Skills, Effective **Budgeting & Cost Control**, **Financial Analysis & Reporting**, **Budget Preparation** Skills, **Commercial** Management, Achieving **Commercial Excellence**, Effective **Commercial Negotiation** Skills, International Oil & Gas **Commercial Contracts** & **Negotiation**, **Business Process** Development, **Business Process** Optimization, **Business Process** Analysis, **Business Process** Improvement, **Business Continuity** Planning, Service Provider Performance & Monitoring, **Cash Flow** Fundamentals, **Business Finance** Fundamentals, **Business Continuity** Fundamentals, **Situational Analysis** Fundamentals, **SWOT** Analysis, **Gap** Analysis, **Change** Management, Human Resource Management (**HRM**), Human Resource Development (**HRD**), **HR Business Development**, **HR Practices & Strategy**, **Behaviour Based Interviewing & Recruitment**, **Learning & Development**, **Project** Management, **Financial** Management, **Planning**, **Budgeting & Cost Control**, **Document** Management, **Record** Management, **Contract** Management, **Negotiation** Management, **Risk** Management, **Leadership & Business** Management, Production & Inventory Management, Warehousing, Purchasing & Marketing Management, Work Engineering & Advanced Production Techniques, Production Logistics, Fleet Management, Stores & Stock Control, Human Resources & Industrial Relations Management, Quality Assurance & Control, Operations Management, Project Management, and Strategic Planning& Management. Previously, he was the **Quality Manager** of **Benteler Automotive**, where he was responsible for implementing, controlling and managing quality and technical department processes and systems and mobilizing the quality control department, procedures and quality management system.

During his career life, Mr. Plessis has worked with several prestigious companies occupying numerous challenging managerial and technical positions such as being the **Training & Development Manager**, **Finance Manager**, **Operations Manager & Trainer**, **Technical Trainer**, **Quality Manager**, **Supplier Manager**, **Logistics & Purchasing Manager**, **Contract & Commercial Manager**, **Production & Material Planning Manager**, **Project Manager**, **Engineering Manager & Trainer**, **Metrologist**, **Consultant**, **Quality Control Inspector**, **Fitter & Machinist**, **Apprentice Fitter** and **Part-time Instructor**. All throughout his career, he has mastered and specialized in the application of project management, warehouse & inventory control, value chain analysis, logistics & strategic planning, process flow analysis, business process evaluation & re-engineering, master-plan development, capacity planning and site space-planning & development.

Mr. Plessis has a **Master's Management Diploma** and a **Bachelor's** degree with **Honours** in **Industrial Engineering** & **Management**. Further, he has gained **Diploma** in **Quality Management** as well as in **Production Management**. He is also a **Certified Assessor** & **Moderator** with the Manufacturing, Engineering & Related Services Education and Training Authority (MERSETA), a **Certified Trainer/Assessor** by the **Institute of Leadership & Management** (**ILM**) and a **Certified Instructor/Trainer** by the APICS.

## Course Fee

**US$ 5,500** per Delegate + **VAT**. This rate includes H-STK® (Haward Smart Training Kit), buffet lunch, coffee/tea on arrival, morning & afternoon of each day.

## Training Methodology

All our Courses are including **Hands-on Practical Sessions** using equipment, State-of-the-Art Simulators, Drawings, Case Studies, Videos and Exercises. The courses include the following training methodologies as a percentage of the total tuition hours:-

30% Lectures
20% Practical Workshops & Work Presentations
30% Hands-on Practical Exercises & Case Studies
20% Simulators (Hardware & Software) & Videos

In an unlikely event, the course instructor may modify the above training methodology before or during the course for technical reasons.

## Accommodation

Accommodation is not included in the course fees. However, any accommodation required can be arranged at the time of booking.

## Course Program

The following program is planned for this course. However, the course instructor(s) may modify this program before or during the course for technical reasons with no prior notice to participants. Nevertheless, the course objectives will always be met:

***Day 1***

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|---|---|
| *0730 - 0800* | *Registration and Coffee* |
| *0800 – 0815* | *Welcome & Introduction* |
| *0815 – 0830* | ***PRE-TEST*** |
| *0830 – 1000* | ***Project Documentation & Control Systems***<br>*Contract Administration in the Field • Roles of the Parties • Legal and Contractual Roles • Pre-Construction Activities* |
| *1000 - 1015* | *Break* |
| *1015 - 1115* | ***Project Documentation & Control Systems (cont'd)***<br>*Keeping Good Records • Definition of a Record • Hierarchy of Records* |
| *1115 – 1215* | ***Project Documentation & Control Systems (cont'd)***<br>*Types of Records • The Record as a Constructive Tool in Disputes • Construction Documents as Pivotal Communication Records and Tools* |
| *1215 - 1230* | *Break* |
| *1230 - 1420* | ***Project Documentation & Control Systems (cont'd)***<br>*Keeping Conference and Meeting Records • The Documentation Process • Case Study* |
| *1420 – 1430* | ***Recap*** |
| *1430* | *Lunch & End of Day One* |

**Day 2**

| | |
|---|---|
| 0730 - 0900 | ***Communications among the Participants During the Construction Phase***<br>*Basis for all Communication • The 'Chain of Command' • The Formal versus The Informal* |
| 0900 - 0915 | *Break* |
| 0915 – 1030 | ***Communications among the Participants During the Construction Phase (cont'd)***<br>*The Implied versus. The Explicit • When Not to Communicate* |
| 1030 – 1200 | ***Communications among the Participants During the Construction Phase (cont'd)***<br>*Extent of Distribution • Other Means of Communicating* |
| 1200 – 1215 | *Break* |
| 1215 - 1420 | ***Communications Among the Participants During the Construction Phase (cont'd)***<br>*Establishing a Responsibility Matrix • Case Study* |
| 1420 – 1430 | ***Recap*** |
| 1430 | *Lunch & End of Day Two* |

**Day 3**

| | |
|---|---|
| 0730 – 0930 | ***Organization of Field Administrator's Record System & Project Control***<br>*Designing the Record Forms* |
| 0930 - 0945 | *Break* |
| 0945 – 1100 | ***Organization of Field Administrator's Record System & Project Control (cont'd)***<br>*Essential Elements – Lean and Effective, Processing the Form* |
| 1100 – 1215 | ***Organization of Field Administrator's Record System & Project Control (cont'd)***<br>*Standard Pre-printed Forms: What is Available, Sources, Application of Forms for Specific Uses, On-Site Coordination Meetings and Communication* |
| 1215 – 1230 | *Break* |
| 1230 - 1420 | ***Organization of Field Administrator's Record System & Project Control (cont'd)***<br>*Standard Pre-printed Forms: Monitoring Progress and Schedules, Payment Certificates and Cost Control • Case Study* |
| 1420 – 1430 | ***Recap*** |
| 1430 | *Lunch & End of Day Three* |

**Day 4**

| | |
|---|---|
| 0730 – 0930 | ***Dispute & Claim Causes & Their Impact***<br>*Suspension of Work • Re-sequencing of Work • Variation Orders* |
| 0930 - 0945 | *Break* |
| 0945 – 1100 | ***Dispute & Claim Causes & Their Impact (cont'd)***<br>*Variations in Estimated Quantities • Differing Site Conditions • Defective Specifications and Drawings* |
| 1100 – 1215 | ***Dispute &Claim Causes & Their Impact (cont'd)***<br>*Acceleration of the Work • Force Majeure • Termination for Convenience* |

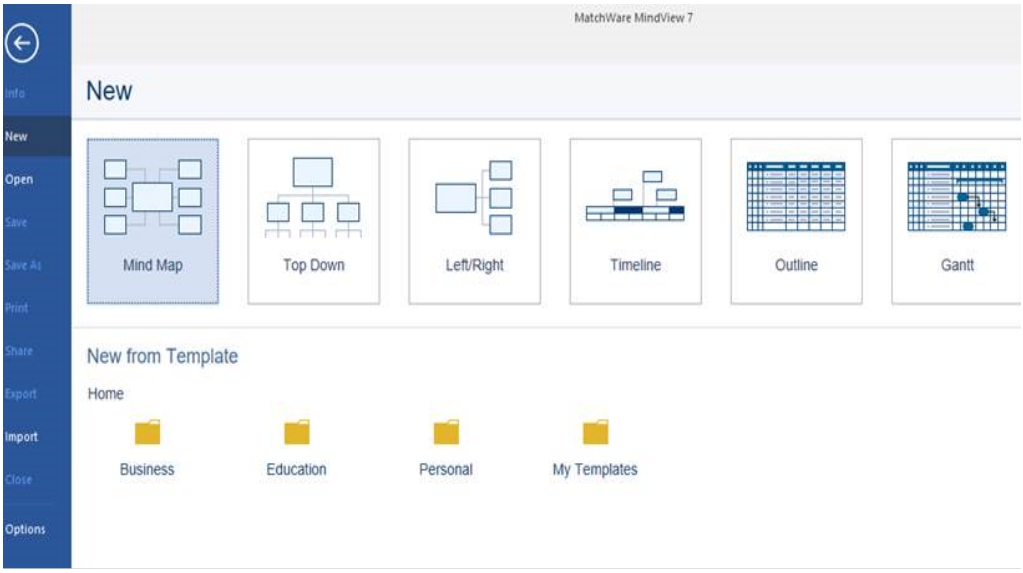
| | |
|---|---|
| *1215 – 1230* | *Break* |
| *1230 - 1420* | ***Dispute & Claim Causes & Their Impact (cont'd)***<br>*Termination for Default and Re-Procurement • Case Study* |
| *1420 – 1430* | ***Recap*** |
| *1430* | *Lunch & End of Day Four* |

***Day 5***

| | |
|---|---|
| *0730 – 0930* | ***Claim & Dispute Management & Prevention***<br>*Substantial Completion & Project Hand Over • Commissioning and Handing Over* |
| *0930 – 0945* | *Break* |
| *0945 – 1100* | ***Claim & Dispute Management & Prevention (cont'd)***<br>*Substantial Completion • Preparation of Punch List • Starting of Systems* |
| *1100 – 1200* | ***Key Principles of Successful Contracts*** |
| *1200 - 1215* | *Break* |
| *1215 - 1300* | ***Practical, Problem-Solving Exercises Based on Typical Site Problems*** |
| *1300 - 1315* | ***Course Conclusion*** |
| *1315 - 1415* | ***COMPETENCY EXAM*** |
| *1415 - 1430* | *Presentation of Course Certificates* |
| *1430* | *Lunch & End of Course* |

**Simulator (Hands-on Practical Sessions)**

Practical sessions will be organized during the course for delegates to practice the theory learnt. Delegates will be provided with an opportunity to carryout various exercises using the " Mindview Software".




**Course Coordinator**

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