

Materials Management – Objective and Table of Contents

Objective

The Material Management process integrates the procurement and warehousing requirements to purchase, expedite, receive, inspect, maintain, and issue all materials and equipment for the project. The Procurement Process objective is to execute the approved procurement strategy, minimizing project costs while maximizing the quality of subcontracts and material with delivery on or ahead of the scheduled dates required. Equipment and materials are stored, maintained, and then distributed in the most efficient manner enabling the construction forces to install upon receipt.

Key Steps

- Bonding recommendations
- Develop the procurement strategy
- Develop a warehousing and laydown plan
- Developing scopes of work for bid packages
- Distribute, collect and maintain tools and tool inventory
- Effective negotiations with contractors and vendors
- Efficient distribution system
- Evaluating and recommending bidders
- Inspection
- Maintain equipment
- Manage consumables and stock item inventories
- Offloading with proper rigging and safety
- Order long lead equipment
- OS&D reporting
- Pre-qualify vendors and subcontractors
- Procure and expedite material and equipment
- Receiving, warehousing, and maintaining material and equipment

Key Deliverables

- Bid analysis and recommendations
- Claims support documentation
- Delivered material and equipment
- Equipment and materials distributed efficiently
- Equipment purchases and delivery
- Expediting reports
- Inspection and inspection reports on delivered equipment and material
- Maintain equipment in dry condition, inside or outside
- Maintenance programs on equipment requiring such action
- Material status report
- Organized warehouse and laydown areas
- OS&D reports and associated logs
- Procurement status report
- Purchase orders, subcontracts, and related change orders
- Receiving related reports and logs
- Tally out notifications for any item leaving the project site
- Written procurement strategy and bid package schedule
- Written scopes of work for each bid package (commercial and technical)

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Checklists

- Contractor Reference Checklist
- Electronic Equipment Inspection Checklist Materials Management
- Equipment Condition Checklist Materials Management
- Material Management Checklist
- Material Receiving Checklist
- Materials Checklist
- Procurement Checklist Quality
- Procurement Checklist
- Receiving Inspection Checklist Materials Management
- Storage Inspection Checklist Materials Management
- Subcontract Plan Checklist
- Subcontracts Checklist

Education and Training

- Criticality Rating Adjustment Based on Supplier Design
- Material Management Case Study
- Material Management Exam Answers Training
- Material Management Exam Training
- Material Management Objectives
- Material Management Process Flow
- Material Management Process
- Materials Handling and Storage Guide
- Procurement Case Study
- Procurement Exam Answers Training
- Procurement Exam Training
- Procurement Process Flow
- Procurement Process
- Progressive Lump Sum Approach
- Shipping Instructions Terms and Definitions Procurement
- Subcontract Types Advantages and Disadvantages Procurement

Forms

- 00 61 00 Bond Worksheet Form
- Additional Required Documentation Procurement
- Affidavit Release and Waiver Form
- Agreement Release Log Procurement
- Application for Final Payment Procurement
- Application for Payment Procurement
- Architect Engineer - Letter of Interest
- Best and Final Addendum Initial Bid Package Questions and Responses

- Bid Inquiry Subcontract Agreement Supplemental Labor Procurement
- Bid Inquiry Subcontract Long Form Procurement
- Bid Inquiry Subcontract Technical Services Procurement
- Bid Package Requisition Form
- Bid Tabulation
- Bid Waiver Blank
- Bond Worksheet Form Procurement
- Bulk Sales Agreement and Contract
- Certificate of Insurance Sample
- Change in Control Agreement
- Clarifications and Exceptions
- Confidential Subcontract Inquiry Bidders List
- Contractor - Letter of Interest
- Cover Letter Template
- Craft Expediting Form for Material
- Credit Card Purchasing Report Log Procurement
- Daily Material Received Log
- Daily Tally Out Log
- Definition of Contractor General Conditions, Overhead and Fee
- Dollar Break Requirements Procurement
- Equipment Loss and Damage Claim
- Form of Proposal Procurement
- General Contractor Contract Issues
- General Contractor Pre-Qualification Document
- General Terms and Conditions for Purchase Order Involving Labor
- Hygienic Material Receiving Log Materials Management
- Hygienic Tube Fitting Receiving Inspection Report Materials Management
- Hygienic Valve Inspection Receiving Report Materials Management
- Inquiry Acknowledgement Procurement
- Inquiry Cover Letter Procurement
- Instructions to Bidder Procurement
- Insurance Requirements
- Inventory Listing - Small Tools and Consumables Materials Management
- Letter of Interest for Pre-Qualifications Template
- Letter to Local Suppliers Template
- Letter to Supplier Regarding Change Management
- Loss and Damage Claim
- Material and Equipment Care and Maintenance Requirements
- Material Expediting Form
- Material Management Process
- Materials Handling Licensing Card Safety
- Materials Handling Work Plan
- Miscellaneous Provisions
- Non-Governmental Project Certifications

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Procurement

- Notice of Non-Compliance
- Notice of Unsatisfactory Performance
- Notices Procurement
- OS&D Call Report Form Materials Management
- OS&D Log Materials Management
- Price Procurement
- Procurement and Bonding Procedure Variance Request
- Project Controls Requirements Procurement
- Proposed Subcontractors
- Purchase Order & Subcontract Checklist
- Purchase Order Closeout Form
- Purchase Order Log
- Purchase Order Standard Terms and Conditions
- Quotation Analysis Rental Master
- Receiving Inspection Form
- Receiving Report
- Reference Letter Template
- Repair Alteration Traveler
- Repair Progress Report Form
- Report on Use of Rented Equipment Form
- Representations and Certifications
- Requisition Subcontract Inquiry Master Procurement
- Scope of Work Procurement
- Shop Inspection Form
- Site Specific Conditions Procurement
- Special Terms and Conditions
- Subcontract Agreement
- Subcontract Approval Requirements
- Subcontract Requisition
- Subcontract Scope of Work
- Subcontract Status Detail Report
- Subcontract Status Summary Report
- Subcontractor Affidavit, Release of Lien and General Release
- Subcontractor Evaluation
- Subcontractor HSE Requirements and Responsibilities
- Subcontractor Insurance Requirements
- Subcontractor Monthly Safety Report
- Subcontractor Pre-Qualification
- Subcontractor Qualification
- Subcontractor Safety Health and Environmental
- Supplemental Terms for Rental Equipment
- Supplier Qualification
- Tally Out Report
- Terms and Conditions
- Time and Material Rates Procurement
- Time and Sequence of Performance
- Tool Inventory Control Procurement
- Tool Issuing Control Materials Management
- Unit Rates
- Vendor Inspections Completed Form
- Vendor Subcontractor Confidentiality Agreement

Policies and Procedures

- Administration of Subcontractors Procedure
- Bidders List and Qualification Selection Procedure
- Credit Card Program Procedure
- Demurrage Charges Procedure
- Equipment Procurement Procedure
- Informal and Formal Letter of Inquiry Procedure
- Issuing Materials and Equipment Procedure
- Material Storage and Control Procedure
- Materials Handling Procedure
- Materials Handling Storage and Disposal Safety Procedure
- Outbound Shipments Procedure
- Over, Short and Damaged Shipments Procedure
- Procurement Documentation Procedure
- Procurement Logs Procedure
- Procurement Planning Procedure
- Purchase Order Involving Labor and Tech Serv Agreement Procedure
- Purchase Orders Procedure
- Receiving Inspection Procedure
- Rental Equipment Procedure
- Report on Use of Equipment Rented Procedure
- Requisitions and Quotations Procedure
- Shipping, Routing, Traffic and Expediting Procedure
- Shop Inspection Procedure
- Subcontract Coordination Procedure
- Subcontract Prime Contract Flow down Requirements Procedure
- Subcontract RFP and Award Procedure
- Subcontractor Codes
- Subcontractor Qualification Procedure
- Subcontractor Safety Responsibilities
- Supply Policies for Contractor Owned Equipment Procedure
- Surplus Materials and Sale of Scrap Procedure
- Tool Inventory and Controls Procedure
- Transportation Charges (Freight Bills) Procedure
- Vendor Surveillance Procedure
- Warehouse and Receiving Procedure