GENERAL COORDINATION

1. Has project management held coordination and interface meetings with materials management personnel?

2. Has the scope and schedule been made available and reviewed with materials management personnel?

3. Has a project material requirements responsibility matrix been developed?

4. Has engineering reviewed the material requirements responsibility matrix?

5. Does engineering understand the materials management organization and its support responsibilities?

6. Has engineering been given an overview of material systems, including engineering interfaces, which will be used by materials management?

MAJOR & MINOR EQUIPMENT INQUIRY AND PURCHASE REQUISITIONS

1. Has engineering provided materials management personnel a copy of major & minor equipment lists?

2. Has engineering developed a change control procedure for major & minor equipment?

3. If yes, has the procedure been reviewed with materials management personnel?

4. Has engineering reviewed major & minor equipment tagging scheme with materials management personnel?

5. Has engineering reviewed the routing requirements for tagged equipment inquiry packages with materials management?

6. Has engineering reviewed the required attachments list and routing requirements for tagged equipment purchase requisitions with materials management?
7. Does engineering periodically compare the major equipment list and instrument index against the materials management inquiry and requisition status reports to verify that all required items are being purchased?

**BULK MATERIALS**

1. Has engineering provided materials management with a copy of all bulk material specifications?

2. Has engineering and materials management developed a bulk material takeoff responsibility matrix for:
   a. Underground piping requirements?
   b. Aboveground piping requirements?
   c. Shop fabricated requirements?
   d. Valves?
   e. Instrumentation bulk?
   f. Electrical materials?
   g. Piping and electrical specialty items?
   h. Concrete, rebar, and miscellaneous Steel?
   i. Insulation?
   j. Other building and structural materials required?

3. Has engineering defined which specifications are to be automated for CAD takeoffs and which specifications are to be automated for non-CAD takeoffs?

4. Has engineering coordinated CAD interface and specification automation requirements with materials management?

5. Has engineering developed an internal transmittal form to transmit design drawings to materials management for review and material takeoff?
Project Materials Management Audit Checklist

6. Does engineering plan to provide materials management personnel with estimated bulk material quantities for initial bulk purchases?
   a. If yes, briefly explain the source of estimated quantities, the expected timing, and what percent of the total engineering requirements the estimate represents.

7. Has engineering identified field run requirements on design drawings?
   a. Are these requirements included with the material takeoffs of designed systems?

DOCUMENT MANAGEMENT

1. Has engineering held coordination and interface meetings with document management personnel?

2. Has the engineering scope and schedule been made available and reviewed by document management personnel?

3. Did both engineering and document management participate in the development of the drawing and document distribution matrix?

4. Has materials management and engineering reviewed the document management staffing plan and manhour budget?

5. Does both materials management and engineering understand the document management organization, and its recordkeeping, transmittal, and status reporting responsibilities?

6. Has engineering been given an overview of the automated systems that will be used by document management?

DESIGN DRAWINGS, SPECIFICATIONS, AND SUPPLIER DATA
Project Materials Management Audit Checklist

1. Has engineering defined document management's record keeping responsibility for design drawings, specifications, and supplier data?

2. Has engineering received "Request for Distribution Forms" from document management?

3. Has engineering established the durations for office check and client approval?

4. Is engineering complying with the schedules established for drawing turnaround?

5. Does engineering indicate appropriate data on all Vendor Data Requirements lists?

6. Does engineering periodically compare the drawing register against the document management drawing register to verify accuracy?

7. Has engineering defined project closeout and hand-over requirements for:
   a. Project data books?
   b. Design drawings and Specifications?

OPERATIONAL COORDINATION

1. Has engineering held coordination and interface meetings with procurement personnel?

2. Did engineering and purchasing review the work process flowsheets at the beginning of the project?

3. Did engineering receive Purchasing's agreement on the milestone events to be tracked?

4. Did engineering participate in the preparation and final review of the project bidders lists?

5. If purchase specifications are required, does engineering issue them in a timely manner?

6. Are specifications void of commercial issues?
Project Materials Management Audit Checklist

7. How does engineering communicate changes in the specifications and drawings after award to vendor?

8. Do engineering technical evaluations include commercial/price information?

9. Does engineering adequately justify single-sourcing recommendations?

10. Are descriptions provided on material takeoffs adequate?

11. Does engineering understand the systems used by procurement?

12. Does engineering understand purchasing change order procedures?

13. Does engineering personnel prepare and distribute a conversation report after communicating with suppliers?

MAJOR AND MINOR EQUIPMENT

1. Has engineering developed a major and minor equipment list?

2. Has engineering completed a specification register with scheduled completion dates?

3. Have all equipment specifications been reviewed and approved prior to going out for bid?

4. Does engineering have all equipment tag numbers assigned at the time the purchase order is issued?

5. Is engineering completing the technical evaluations in accordance with the schedule?

6. Is engineering returning "Vendor Data Approvals" on schedule?

7. Are supplier data requirements realistic?
   a. If not, what is required to make them realistic?

CONTRACTS and SUBCONTRACTS
1. Has project management, engineering, construction, and materials management agreed on what activities and requirements to contract to third parties.

2. Has engineering given the contracts administrator a description of the scope of work and associated drawings for each contract or subcontract required?

3. Has engineering annotated the drawing list with the contract(s) affected by each drawing?

4. Will the drawings and specifications be complete enough to get firm prices when the contract packages are issued for bid?

5. Has realistic bidding and execution schedules been established?
   a. If not, what is required to make them realistic?

6. Have “As-Built” drawing creation requirements been included in the contract packages?