



EXPRO National Manual for Projects Management

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2nd Party Material / Procurement Schedule Procedure



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2nd Party Material / Procurement Schedule Procedure

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2nd Party Material / Procurement Schedule Procedure

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2nd Party Material / Procurement Schedule Procedure

1.0 PURPOSE

The purpose of this procedure is to describe the minimum expectations for the 2nd Party to prepare and monitor / report on its procurement activities relative to its lower tier supply chain to the Entity when the Entity determines such requirement is necessary due to the complexity of the Works.

2.0 SCOPE

The procedure applies to Contract Formation and Administration activities associated with lower-tier supply chain procurements under the administration and management of an Entity Project Management Organization (EPMO).

3.0 DEFINITIONS

Term	Definition
2nd Party	Contractor, Consultant, Engineer or Supplier who expresses interest in prequalifying for a specific package of Works or Services and upon Award becomes the entity contracted to perform such Works or Services.
Agreement	Contract or Purchase Order (collectively "Agreement") between the Entity and a 2nd Party.
Construction Contractor	The Main or Principal Contractor responsible for undertaking the Construction Works on the Project. Individual(s) or firm(s) engaged in the construction of buildings, either residences or commercial structures, as well as construction activities such as paving, highway construction, utility construction and landscape installation.
Enterprise Content Management System (ECMS)	An information management and collaboration platform for managing and controlling Project documents and Entity records.
Entity	A Saudi Government organization which is responsible for the delivery of government funded infrastructure construction projects.
ITT	Invitation to Tender documents.
Project	Project to be undertaken by an Entity that consists of single or multiple Agreements with 2nd Parties to perform Works or Services as part of the execution plan to deliver such a Project. Scope of Work and/or services identified by Entity that needs to be executed.
Services	Provision of technical or consulting services for design, studies, investigations (geotechnical, surveying testing), specialist advice or the like that are not the Works but necessary to support them.
Tenderer	A 2nd Party that has prequalified for bidding a specific package for Works or Services, sometimes referred to as a Tenderer.
Works	Construction or supply of goods, facilities or the like of permanent and temporary nature as contracted by the Entity.

4.0 REFERENCE

Not used.



5.0 ROLES & RESPONSIBILITIES

The following defines the roles and responsibilities of the Entity in relation to the control and approval of 2nd Party supplied materials and equipment.

Individual	Role
2nd Party	Responsible for the preparation, monitoring, reporting and updating of the Procurement Schedule throughout life of the Agreement
Contracts Administrator	Receives and distributes Procurement Schedule to project team for information and reviews the updates to identify with Field Engineer any areas of concern or missed milestones and to formalize such concerns via a letter to the 2nd Party.
Contracts Specialist	Shall review the proposed Invitation to Tender documents (ITT) Documentation to capture requirements for the 2nd Party to prepare, submit and maintain a Procurement Schedule for the Tender and execution of the Works following Award.
Field Engineer	Responsible for monitoring against the Procurement Schedule and identifying any areas of concern to the Contracts Administrator for documenting via formal correspondence to the 2nd Party

6.0 PROCESS

6.1 Pre Award

The Contracts Specialist shall review with the originating department of the Requisition for Tendering and the Construction Manager the requirement to include the Procurement Schedule Obligations into the Invitation to Tender documents (ITT). If confirmed, the Contracts Specialist shall include in the Special Conditions a specific clause relative to the 2nd Parties obligations to prepare, submit, monitor, maintain and report against the Procurement Schedule following award of the Agreement.

The Contracts Specialist shall solicit from the Construction Department, the schedule of the critical materials and equipment (**Attachment 1**) that are to be captured on the Procurement Schedule. It is important to note that capturing all materials and equipment for a project may not necessarily be warranted due to the criticality and availability of common materials and equipment so limiting to those that are critical to maintain the project schedule and execution of the works should be the priority.

During the Tender Negotiations, and upon finalization of the Recommendation to Award, the Contracts Specialist shall incorporate into the final Agreement for Execution the approved Procurement Schedule as submitted by the recommended Tenderer to form the baseline for the monitoring of the critical procurement activities once the Agreement is executed.

6.2 Post Award

The 2nd Party shall update and submit on regular basis (as defined in the Agreement) the Procurement Schedule for information purposes to the Entity.

The Field Engineer and Contract Administrator shall review the Procurement Schedule and identify any areas of concern, slipping of forecast dates, progress, and status of the critical items and raise any concerns to the 2nd Party by issue of formal correspondence.

During course of the Works or Services, if due to changes in the execution of the Works, or changes in key schedule dates, the Field Engineer may identify additional materials or equipment that the Field Engineer believes to now be critical in terms of delivery and request the addition of these into the Procurement Schedule by the 2nd Party.



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6.3 Document Retention

The Contracts Administrator shall archive and store the updates of the Procurement Schedule to record the chronological order of events relative to the procurement of critical materials and equipment.

7.0 ATTACHMENTS

1. EPM-KDR-TP-000006 - Procurement Schedule for Critical Materials and Equipment Template

[illegible]