



**Capital Improvements Committee
Policy Recommendation for
Approval of Scope Changes to
Capital Improvement Projects**

OVERVIEW

The Will County Board's Capital Improvements Committee seeks a reasonable and expedient policy to review and approve (or reject) Scope Changes that may arise on current and future Will County Capital Improvement Projects. Scope Changes are defined as either, "additive or deductive changes to base contract services or work that has been previously authorized by the Will County Capital Improvements Committee". Base contract 'services' apply to the realm of professional services that involve professional design and/or engineering input (also referred to as a *Contract Modification or Contract Amendment*). Base contract 'work' (also known as a *Change Order*) applies to a construction contract involving deviation(s) from the bidding documents. In either case, most Scope Changes result from the following variables:

- I. Owner's Request
- II. Building Code Compliance
- III. Unforeseen or Concealed Conditions
- IV. Errors and Omissions

Contract Modification or Amendment

In most cases, a Scope Change begins with a sketch generated by the Architect in response to one or more of the items listed above. Depending upon the significance of the Scope Change, as few as one trade can be affected; or, the impact may affect multiple trades. If the Scope Change is requested by the Owner (Will County Capital Improvements Committee), the Architect will request additional compensation based upon a unit cost and duration, typically set forth in the executed contract between the Will County and the architect.

Change Order

Also likely resulting from items I – IV above, a sketch or revised drawing is issued by the Architect, either for clarification or to document changes to the bidding documents. Each is tracked separately by the Construction Manager and the information shared with the relevant trade contractors. Changes in price for each trade contractor, either additive or deductive, are compiled by the Construction Manager, analyzed for impact to schedule, and presented to the Owner (Will County Capital Improvements Committee) for review and approval (or rejection).

Capital Improvements Committee Approval

1. In the event that a given Scope Change is deemed to be an emergency (defined as a threat to life-safety or potential for damage to work-in-place), it is recommended that Will County Capital Committee Owner's Representative direct the Architect and Construction Manager to proceed, following consultation with the Will County Capital Improvements Committee Chair.
2. For routine Scope Changes with a total value of less than \$5,000.00, it recommended that Will County Capital Committee Owner's Representative direct the Architect and Construction Manager to proceed without prior Capital Improvement Committee approval. For routine Scope Changes with a

total value between \$5,000.00 and \$20,000.00, The Will County Capital Improvements Committee Representative to get approval from the Will County Capital Improvements Chairman. Will County Capital Improvements Committee Owner's Representative shall inform Capital Improvements Committee of all such matters during the next regularly scheduled Capital Improvements Committee meeting.

3. For routine Scope Changes with a total value greater than \$20,000.00 or cumulative total of \$20,000 by one individual, business or entity, it recommended that Will County Capital Committee Owner's Representative seek Capital Improvements Committee approval prior to directing the Architect and Construction Manager to proceed. The Will County Capital Committee Owner's Representative shall present Capital Improvements Committee with details pertaining to such matters during the next regularly scheduled Capital Improvements Committee meeting.

4. For any and all reimbursables, it is recommended that the Will County Capital Committee Owner's Representative seek Capital Improvements Committee approval prior to directing the Architect and Construction Manager to proceed. The Will County Board Owner's Representative shall present to the Capital Improvements Committee with details pertaining to such matters during the next regularly scheduled Capital Improvement Committee meeting.

5. For any and all substantial changes in design and/or structure, it is recommended that the Will County Capital Committee Owner's Representative seek Capital Improvement Committee approval prior to directing the Architect and/or Construction Manager to proceed. The Will County Capital Committee Owner's Representative shall present the Capital Improvements Committee with details pertaining to such matters during the next regularly scheduled Capital Improvements Committee.

6. Should the Capital Improvements Committee Chairman be absent or unavailable, The Executive Committee Chairman possesses the same authority and shall make decisions in his or her absence.