REMEMBER: Document management is critical to managing production!

- Provides a track record of performance
- Enables collaboration and sharing of information
- Ensures expectations are clear
Foremen are responsible for managing production using the following contract documents:

- Scope of Work
- Plans & Revisions
- Scope Changes

Scope changes are inevitable! Foremen must be prepared and ensure adherence to all contract changes.
SCOPE CHANGES

PURPOSE

Scope changes are deviations from the original Scope of Work that may impact:

• production deadlines
• labor requirements
• installation quality

REMEMBER: The Scope of Work is a binding legal agreement that outlines PDI’s installation requirements.
Foremen must help determine scope impact by comparing scope changes against the following:

- **Contract documents**
  - Scope of work, plans, schedule, & specifications

- **Coordination drawings**
  - Slab/Deck, Unit Rough, & Distribution

- **Local code requirements**
  - NEC* & FHA/ADA

*NOTE: Check with your Super on local AHJ requirements
Identifying scope impact starts with understanding the types of scope changes:

<table>
<thead>
<tr>
<th>Type of Change</th>
<th>Source</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design/Scope</td>
<td>Change to the current design/scope Requested by owner</td>
<td>Installing car power to car charging stations</td>
</tr>
<tr>
<td>Unforeseen Conditions</td>
<td>Site conditions differ from expected Requested by contractor or professional</td>
<td>Granite subgrade throughout site</td>
</tr>
<tr>
<td>Professional Errors &amp; Omissions*</td>
<td>Change requested by contractor or PDI Error – Incorrect design or specifications. Omission – Inadvertently omitted item or element from plans.</td>
<td>Missing corridor receptacles</td>
</tr>
</tbody>
</table>

*NOTE: If contracted to code, an error or omission would be a change in scope!
Scope changes are initiated by the following methods:

- Plan Revision
- Verbal or written request for pricing (RFP)
- Field Directive
SCOPE CHANGES

HOW – WRITTEN DIRECTIVE

Do **NOT** begin any work outside of the contract documents without receiving a written directive or change order.

- Confirm with Super prior to beginning work
- **DO NOT** proceed without proper documentation!
Work with the Super to review plan revisions in Plangrid:

- Review previous versions
- Compare sheets
- Determine scope impact

CAUTION:
Foremen should not proceed with work for any plan revision without direction from the Super!

NOTE: Verify drawings are labeled as Issued for Construction (IFC)!
SCOPE CHANGES
HOW – PLAN REVISIONS

Access previous versions in Plangrid from:

Sheets View: use filter tool
Individual Sheet: swipe up

NOTE: Plangrid defaults to the most current set.
To compare sheets in Plangrid:
1. tap the eye icon
2. select ‘Compare Sheet’
3. select the previous version
SCOPE CHANGES
HOW – FIELD DIRECTIVE

Change requests may arise in the field during:
• gc/owner job walks
• weekly jobsite meetings
• onsite coordination meetings

If approached by the GC/owner, Foremen must:
✓ maintain a positive demeanor with the customer
✓ re-direct the request to the Super
✓ review changes with Super for scope impact

REMEMBER: Do **NOT** begin any work without a written directive or change order.
GC/Owner may submit a Request for Pricing (RFP) for changes:

- verbally
- in writing

Review request with the Super to determine:

- scope impact
- labor requirements
- material needs

REMEMBER: Do NOT begin any work without a written directive or change order.
If a change impacts PDI’s scope, Foremen are responsible for helping the Super:

- Identify labor and material requirements
- Update goals to align with the changes*
- Set and communicate new expectations to team

*REMEMBER: Goals need to be SMART!