

**CARROLL COUNTY PUBLIC SCHOOLS
ADMINISTRATIVE REGULATIONS**

BOARD POLICY FEF: CONSTRUCTION CHANGE ORDERS AND SUBSTITUTIONS

INTRODUCTION

The issue of product substitution may occur on a construction project for a variety of reasons and may be initiated by the contractor, design consultants or Carroll County Public Schools' staff.

A substitution is defined as a product provided by a manufacturer not originally listed as an approved manufacturer in the contract documents.

PURPOSE

This procedure outlines those circumstances in which product substitutions may be proposed and provides guidelines for consideration. In general, products specified in the contract documents are developed from the CCPS Architectural/Engineering Design Standards and, therefore, substitutions must be evaluated and approved by the construction team and involving those administrative groups as appropriate (i.e. Instruction, Maintenance, Operations, etc.).

Information regarding the contractor obligation for product substitutions is provided in AIA Document A701 - Instructions To Bidders, Section 3.3, Substitutions and is provided to each prospective bidder.

PROCEDURE

In general, substitutions may be considered either pre-bid or post-bid. CCPS does not allow pre-bid substitutions to be considered due to the bid schedule and complexity of product review.

CCPS will consider substitution requests after the bid if all of the following conditions exist:

1. The construction documents do not specify at least three (3) acceptable manufacturers.
2. Product manufacturer is not considered proprietary.
3. Design consultants determine the substitution is acceptable.
4. The substitution has a clear benefit to CCPS, such as:

1. Delivery of the specified product adversely impacts the project schedule and the recommended product substitution can be obtained earlier. Substitutions will not be considered if the delivery delay is due to contractor negligence. Under those circumstances of contractor negligence where no other alternative exists but to accept the substitution, the contractor shall bear all cost associated with the substitution including delays and expenses to other trade contractors.
2. The substitution results in an overall credit to the project. A substitution with the main benefit being a credit should only be considered in those circumstances in which the project budget is in jeopardy.
3. The substitution replaces an obsolete technology. The result of this type of substitution may be a net credit, add or no change.

Substitution approval must be accompanied by documentation indicating the reason for the substitution, benefit to CCPS and authorization from the Architect and Engineer, if applicable, Construction Assistant and Supervisor of Construction.

All approved substitutions shall be forwarded to the Board of Education.