## Change Order/Contract Amendment

## **Cover Sheet and Instructions**

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|  | | | APPROVED DOCUMENT – This document is approved by the Office of the President and Office of the General Counsel for use by the Facility. | | | | |
|  | | |  | | | | |
| **PURPOSE OF DOCUMENT:** | Used to issue Change Orders and Contract Amendments | | | | | | |
| **CROSS-REFERENCE TO FACILITIES MANUAL:** | None | | | | | | |
| **CONTENTS:** | Change Order/Contract Amendment | | | | | | |
| **FOR USE WITH:** | CM/Contractor Agreement | | | | | | |
| **COMPLETED BY:** | ✓ | Filling in | | ✓ | Adding Text |  | No Data Required |
| **ITS USE IS:** | ✓ | Required | |  | Optional | | |

**NOTE:** To use the electronic file of this document, you must go to the “Tools” pull down menu in Microsoft Word, select “Options,” select the “View” tab, and then put a check in the box “Hidden text.” Most instructions and alternate language is displayed in hidden text. Do not print the hidden text for the final document.

**Completion Instructions:**

1. The type of documents, e.g., Change Order or Contract Amendment is indicated by checking the appropriate box on the form.

2. Notes, suggested text, instructions and other information is formatted using the following methods:

* Hidden text within brackets. {This is an example of the format.} Read the material within the brackets and take the appropriate action (usually inserting text or selecting from a choice of texts.) When printing this document, the default print property will not print the hidden text.
* When a paragraph e.g. paragraph 1.2 is not used for a specific Change Order/Contract Amendment delete the provisions therein and insert the term “NOT USED.”

**Modifications and Additions:**

None required or allowed.

**Comments:**

The expected rate for worker’s comp on a change order can be calculated using the following formula: Expected Rate = WCIRB base rate by class code X 1.10 X EMR. Current approved WCIRB (Workers Compensation Insurance Bureau of California) rates for specific trades can be obtained from Campus Risk Management. Facilities may register at [www.compline.com](http://www.compline.com), for a fee, to look up EMR for a contractor. Alternatively, the Facility may request the contractor to submit their Compline EMR report with their Change Order Request.

END OF COVERSHEET AND INSTRUCTIONS

EXHIBIT

CHANGE ORDER/CONTRACT AMENDMENT

University of California Facility:

{Numbers must be sequential. Example: If a Contract Amendment is issued after Change Order number 4, it would be Contract Amendment number 5.}

CHANGE ORDER /CONTRACT AMENDMENT NO.

Reference Field Order No.

Project Name:

Project Number: Contract Date

To CM/Contractor:

Address:

{Check box indicated whether this is a Change Order or a Contract Amendment. If a Contract Amendment, check the appropriate box to indicate whether it is to exercise the Option or to incorporate a Bid Package.}

🞎 DESCRIPTION OF CONTRACT AMENDMENT

{Complete only when 1) the University exercises its Option for Phase 2 OR 2) the University adds a Bid Package.}

🞎 University hereby exercises its Option for Phase 2. {Complete paragraph 2.0 indicating the change to the Contract Sum and the Contract Time. Delete paragraphs 1. 0 and 3.0 and insert the phrase “NOT USED”.}

🞎 University hereby incorporates the Work of Bid Package Number \_\_\_\_\_ into the Contract.

{Complete paragraph 3.0 indicating the change to the Contract Sum. NOTE – there is NO change to the Contract Time when incorporating a Bid Package. Delete paragraphs 1. 0 and 2.0 and insert the phrase “NOT USED”.}

🞎 DESCRIPTION OF CHANGE: {Complete only if this is a Change Order per General Conditions Article 7. This includes changes to the Work, Contract Time, Contract Sum, Option Sum, or Option Time. Also complete paragraph 1.0 indicating the changes, if any, to the Contract Sum and Contract Time and the changes, if any, to the Option Sum and the Option Time. Delete paragraphs 2.0 and 3.0 and insert the phrase “NOT USED”.}

1.0 Change Order Adjustment

{Only applicable if this is a Change Order.}

* 1. {Use when there is an adjustment to either/both the CURRENT Contract Sum and Contract Time as a result of the change. Changes to the Option made during Phase 1 are reflected in 1.2 below.}

ADJUSTMENT OF CONTRACT SUM ADJUSTMENT OF CONTRACT TIME

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Original Contract Sum: |  |  | Original Contract Time: |  | (Days) |
| Prior Adjustments: |  |  | Prior Adjustments: |  | (Days) |
| Contract Sum Prior to this Change: |  |  | Contract Time Prior to this Change: |  | (Days) |
| Adjustment for this Change: |  |  | Adjustment for this Change: |  | (Days) |
| Revised Contract Sum: |  |  | Revised Contract Time: |  | (Days) |

1.2 {Use when a Change Order is issued during Phase 1 to adjust either/both the Option Time and the Option Sum.}

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| ADJUSTMENT OF OPTION SUM-PHASE 2 | |  | ADJUSTMENT OF OPTION TIME – PHASE 2 | | | |
| Original Option Sum  Phase 2: |  |  | Original Option Time  Phase 2: |  | (Days) |
| Prior Adjustments: |  |  | Prior Adjustments: |  | (Days) | |
| Option Sum Prior to this Change: |  |  | Option Time Prior to this Change: |  | (Days) | |
| Adjustment for this Change: |  |  | Adjustment for this Change: |  | (Days) | |
| Revised Option Sum Phase 2 : |  |  | Revised Option Time Phase 2: |  | (Days) | |

1. Contract Amendment - Exercise of Option for Phase 2

{Only applicable if this is a Contract Amendment to exercise the Option for Phase 2.}

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ADJUSTMENT OF CONTRACT SUM | |  | ADJUSTMENT OF CONTRACT TIME | | |
| Original Contract Sum: |  |  | Original Contract Time: |  | (Days) |
| Prior Adjustments by Change Order (if applicable): |  |  | Prior Adjustments by Change Order (if applicable): |  | (Days) |
| Contract Sum Prior to this Amendment: |  |  | Contract Time Prior to this Amendment: |  | (Days) |
| Current Option Sum – Phase 2: |  |  | Current Option Time - Phase 2: |  | (Days) |
| Revised Contract Sum: |  |  | Revised Contract Time: |  | (Days) |

3.0 Contract Amendment – Incorporation of Bid Package

{Only applicable if this is a Contract Amendment to incorporate a Bid Package.}

|  |
| --- |
| ADJUSTMENT OF CONTRACT SUM |

|  |  |  |
| --- | --- | --- |
| Current Contract Sum Prior to this Amendment: |  |  |
| Adjustment for this Amendment: |  |  |
| Revised Contract Sum: |  |  |

1. Current Contract Status Summary (Inclusive of Adjustments Above)

Contract Sum \_\_\_\_\_\_\_\_\_\_\_

Contract Time \_\_\_\_\_\_\_\_\_\_\_\_

Option Sum \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Option Time \_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. CM/Contractor waives any claim for further adjustments of the Contract Sum and the Contract Time related to the above described change in the Work. (Applicable only if signed by CM/Contractor.)

Recommended: Accepted: (Signature not required if this is a Contract Amendment)

By: By:

(Signature of University's Representative) (CM/Contractor Signature)

(Printed Name) (Printed CM/Contractor Name)

Date: Date

Reviewed and Recommended

By:

(Signature of University's Designated Administrator)

(Printed Name)

Date:

Funds Sufficient:

By:

(Signature from University's Accounting Office)

(Printed Name)

Date:

Approved:

UNIVERSITY: THE REGENTS OF THE UNIVERSITY OF CALIFORNIA

By:

(Printed Name)

(Signature)

(Title)

Date: