

Change Management | Level 2

Instructor Setup

1. Create the projects needed for the scenarios.
2. Assign student(s) to project(s).
3. Create a Prime Contract and at least one Commitment within your project(s). This step can be completed by the instructor or a student. Contracts should be in an “Approved” status.
4. *Optional:* Upload a Budget to your project(s). This step can be completed by the instructor or a student.
5. Requires completion of at least one scenario included in the Change Management | Level 1 scenarios.
6. Encourage students to complete the survey once they have completed the required scenarios. (*QR code to survey included on last page*)

Things to Consider

- All scenarios are web based- to be completed on a desktop/laptop.
- This exercise also requires that either the instructor or a student respond to any RFQs submitted in Change Management | Level 1 scenarios.
- Scenarios ask students to create Change Orders from Change Events.
- Times listed are estimates and can vary depending on student groups.

Roles Involved- Optional

General Contractor - Project Manager

General Contractor - Superintendent

Recommended Student Permissions

Change Events: Standard or Admin.

If incorporating another tool in the process, user must also have Standard or higher on that tool, and/or permission to view private contracts.

Must have Admin to create an RFQ from a Change Event.

Scenario 1 | Making Change (~15 min)

As the project manager, it's your job to manage changes on the jobsite. Review the Change Event(s) RFQs that were created in the previous scenarios. Now that pricing has been collected from the trades involved, it's time to request the funding from the owner. Submit a change order for the new costs associated with the change.

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Scenario 2 | Add it Up! (~15 min)

The owner on the project has approved the funding for the change orders. Now it's time to make amendments to the trade's contract. Determine how to best modify the subcontract while maintaining the original schedule of values.

Reference support.procore.com if you get stuck to find support articles that will help walk you through this process.

Let the Procore.org team know what you thought of this activity. Use a smartphone or tablet to scan the QR Code below. Complete the survey and be entered to win Procore swag!

