Intended Use

The Site Instruction (SI) process is initiated by the Consultant and is used for formal communication with the Contractor to provide clarification, additional information, and/or direction related to a contract document or requirement, within the scope of the Contract. An SI cannot be used to process Extra Work or change the Contract, including cost, schedule or other impacts. If the Consultant determines the communication will include a contract change, the Contemplated Change Notice (CCN) process shall be utilized.

The use of the construction change management process and its associated form templates requires collaboration, communication and judgement within the project team to determine the process most suitable for each circumstance, which can vary between projects.

Examples of where a SI would typically be used include:

- Make minor changes to dimensions or details on the Drawings prior to the affected work starting.
- Clarify the meaning or intent of Contract documents (Drawings, Special Provisions, etc.).
- Clarify the interaction of the various contract documents with respect to specific details.

Instructions for Use

A process workflow map is provided to illustrate the typical sequence of steps in the SI process, including identification of the party responsible for each step, and should be referenced as necessary throughout the process.

The SI form shall be completed comprehensively to support timely and accurate communication, evaluation and documentation of the instruction. Contract document references, photographs, sketches, technical data sheets, inspection reports, and other supporting information shall be included as applicable. If additional space for responses or supporting information is required than can be accommodated by the form, they can be included as attachments.

If revisions are required during completion of the SI process, a new version of the form should be issued along with sequential revision numbering to track its development.

Signature fields not required are to be crossed out or marked N/A.

A SI is generated by the Consultant and provided to the Contractor for review. The Contractor reviews the SI and provides a response, including whether a Contemplated Change Notice (CCN) is requested based on their determination of a potential change to the Contract. If a CCN is not requested, the Consultant reviews the Contractor's response and provides a response to complete the SI process.

If the Contractor requests a CCN be generated by the Consultant due to a potential change to the Contract, justification and supporting documentation for the potential change shall be included in their response. The Consultant, in consultation with the Department, will evaluate the justification and supporting documentation and provide a response. This review may, at the discretion of the Consultant and Department, involve a Tri-Party Meeting. If the Consultant, in consultation with the Department, determines that there is no change to the Contract, the Contractor shall proceed in accordance with the SI. The Contractor may pursue the matter further through the Claim and Dispute Resolution process, if required.

Process Timelines

SI process timelines should generally be in accordance with the date which the Consultant has indicated on the form, provided the date requested is reasonable. The Consultant also has the option to indicate that an SI is a high priority, which should be used appropriately and reasonably. Initial response timelines will vary (typically 1 to 7 days) but could be longer based on complexity and level of review required.

Lines of communication and expectations for the submission, review and processing of Construction Change Management forms should be discussed during the preconstruction meeting. If items are identified during the project which require expedited resolution to avoid safety, cost, schedule, or other time sensitive impacts, they shall be brought to the attention of all parties as soon as possible. The project team shall then work collaboratively to determine a path forward, establishing expedited timelines to minimize the associated impact(s).

Result of Use

The use of the SI process will result in one of the following outcomes:

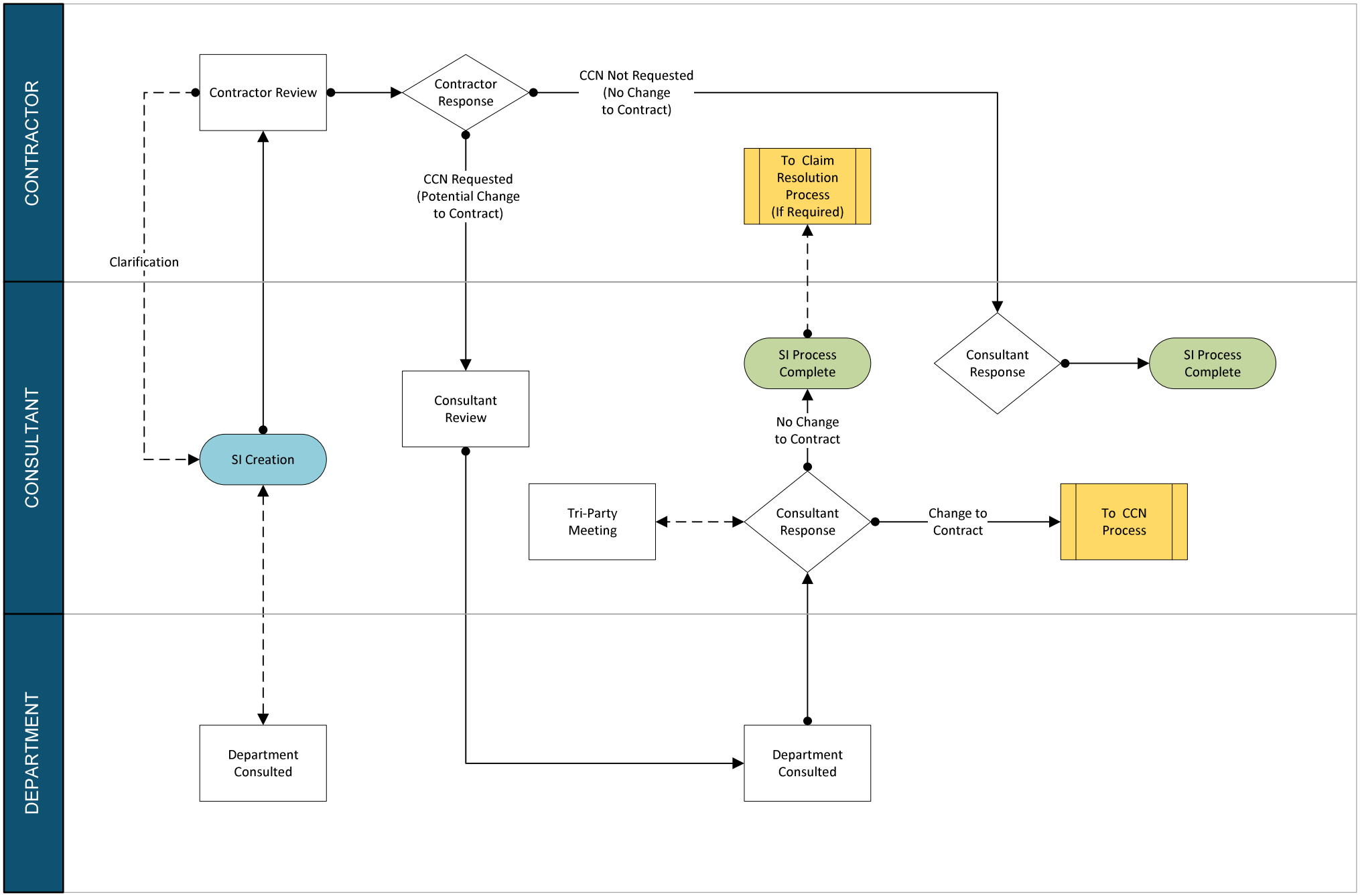
- If the Contractor indicates no change to the Contract is required (a CCN is not requested in their response), the Consultant reviews the Contractor's response and the SI process is complete.
- If the Contractor indicates a potential change to the Contract is required (a CCN is requested in their response), the Consultant/Department reviews the request for a CCN and determines:
    - A change to the Contract is required and the CCN process is initiated by the Consultant; or
    - No change to the Contract is required and the SI process is completed (the Contractor may proceed to the claim and dispute resolution process, if required).

Contact

For more information or feedback on bridge construction administration change management processes please contact the project management office at:

tec.cm-pmo@gov.ab.ca

The change management process reference material provided above is not required to be included with the following process form as part of project transmittals/submissions.


CONTRACTOR
CONSULTANT
DEPARTMENT
Contractor Review
Contractor Response
CCN Not Requested (No Change to Contract)
CCN Requested (Potential Change to Contract)
To Claim Resolution Process (If Required)
Clarification
SI Process Complete
Consultant Response
SI Process Complete
Consultant Review
No Change to Contract
SI Creation
Tri-Party Meeting
Consultant Response
Change to Contract
To CCN Process
Department Consulted
Department Consulted

Site Instruction (SI)

Alberta Transportation & Economic Corridors Bridge Construction Administration Change Management

Project Details

Contract Number	Bridge File	Bridge Name/Project Description
CON0000000	BF00000-0	Highway ## over ABCDE River, ## km NW of Town FGH

Contractor

Consultant

SI Information

Subject

SI Number	Revision Number	Creation Date	High Priority	Requested Response Date
SI000	0	YYYY-MM-DD	☐ Yes	YYYY-MM-DD

Contract Reference Documents (if applicable)

Standard Specification Section Number(s)

Drawing Number(s)

Special Provision Section Number(s)

Site Instruction Details (attach supporting documents as required)

Attached Document(s):
(Document Name - Description)

Consultant Representative (Print Name)

Signature & Date

Contractor Response (attach supporting documents as required)

CCN Requested?

☐ Yes ☐ No

Attached Document(s):
(Document Name - Description)

Contractor Representative (Print Name)

Signature & Date

Consultant Response (attach supporting documents as required)

CCN Required? ☐Yes ☐No

CCN Number CCN000

Attached Document(s):
(Document Name - Description)

Consultant Representative (Print Name)

Signature & Date