



# SMACNA Request for Proposals (RFP)

Project Title: Full Rewrite and Modernization of the SMACNA Change Order Manual for the Contractor Operations Manual

**RFP NUMBER: RFP-2026-CHANGEORDERS**

**Date Issued:** 1/20/2026

**Proposals Due Date:** 3/1/2026

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## Project Context and Rationale

SMACNA published its original Change Order Manual in 2015. While that publication provided value at the time, the construction industry has undergone significant change since its release. Schedule compression, evolving delivery models, increased collaboration expectations, tighter margins, and heightened scrutiny around productivity impacts have fundamentally altered how change is managed on modern projects.

Delivery approaches such as design-assist, integrated project delivery, CM at risk, and progressive design build have shifted responsibility and risk earlier in the project lifecycle. These shifts increase the need for proactive, well documented approaches to managing scope changes, schedule impacts, and cost implications before issues escalate into disputes.

Rather than updating the existing manual, SMACNA intends to commission a full rewrite of the Change Order Manual that reflects current project realities. The revised manual will emphasize proactive change management, address schedule compression and acceleration as central drivers of change and incorporate real world insights from contractors and project teams across multiple trades.

The updated manual will become part of the SMACNA Contractor Operations Manual and is intended to serve both as a training and policy resource and as a practical reference that members can rely on during active projects.



## About SMACNA and the Contractor Operations Manual

The Sheet Metal and Air Conditioning Contractors' National Association (SMACNA) develops technical standards, guidance, and applied research to support the operational and business needs of union sheet metal and HVAC contractors across North America and select international markets.

The SMACNA Contractor Operations Manual serves as a practitioner focused reference addressing common operational, contractual, and management challenges faced by contractors. Content within the Manual emphasizes practical decision making informed by industry experience and research rather than theoretical or jurisdiction specific legal interpretation.

The proposed paper on change orders is intended to complement existing content within the Contractor Operations Manual by providing applied research and synthesized industry insights on a topic that directly affects project performance, risk management, and contractor profitability.

## Purpose and Objectives

### Purpose

The purpose of this project is to develop a fully revised SMACNA Change Order Manual that provides practical, proactive guidance to member contractors for managing change in modern construction delivery environments. The manual is intended to support contractor operations by addressing schedule compression, evolving delivery models, and the increasing complexity of project execution.

### *Primary Objectives*

The primary objectives of this project are to:

- Develop a comprehensive rewrite of the SMACNA Change Order Manual that reflects current construction practices and challenges
- Center the manual on proactive change management strategies that reduce risk and improve project outcomes
- Address schedule compression and acceleration as central drivers of change affecting cost, productivity, and performance
- Incorporate real world insights through interviews and surveys of contractors and project teams across multiple trades
- Deliver a practical resource suitable for both training and active project use by project managers and senior leadership

### *Secondary Objectives*

Secondary objectives of this project are to:



- Provide contextual guidance related to claims and disputes without positioning the manual as a claims strategy document
- Address markup justification, contractor cash flow considerations, and productivity impact quantification
- Reflect a range of modern delivery models including design assist, integrated project delivery, CM at risk, design build, and related approaches
- Include case studies, templates, examples, and visual reference tools where appropriate
- Identify opportunities for optional educational extensions such as webinars or podcasts that build on the published manual

## Scope of Work

The selected consultant or academic researcher will be responsible for conducting applied industry research and developing a practitioner focused Change Order Manual aligned with the purpose and objectives outlined above. The scope of work includes the following components.

### Research Design and Review

The consultant will design an applied research approach that may include literature review, targeted surveys, and structured interviews. The research should emphasize prevailing industry practices related to proactive change management rather than exhaustive legal or jurisdiction specific analysis.

Activities may include:

- Review of relevant industry publications, professional guidance, and commonly used construction contract frameworks related to change management and schedule impacts
- Examination of how modern delivery models influence change identification, documentation, and pricing practices
- Identification of recurring themes related to schedule compression, acceleration, productivity impacts, and cost recovery
- Development of interview and survey instruments appropriate for construction professionals involved in project execution and management

### Surveys and Interviews

The consultant will conduct targeted surveys and/or interviews with individuals experienced in managing change on active construction projects. These may include project managers, operations leaders, estimators, and other industry professionals across multiple trades.

Strong encouragement is placed on engaging participants beyond the sheet metal trade to capture cross trade perspectives on change management challenges and practices.



SMACNA will support outreach efforts where feasible to facilitate participation and ensure practical relevance of the findings. A portion of the project budget should be allocated to establish incentives that support meaningful survey and interview engagement.

## Analysis of Change Drivers and Management Practices

Using the research findings, the consultant will analyze and document:

- Common drivers of change on modern construction projects, with particular emphasis on schedule compression and acceleration
- Typical contractor decision points related to identifying, documenting, pricing, and communicating change
- Approaches to markup justification, productivity impact assessment, and cash flow considerations
- Patterns associated with effective proactive documentation and communication practices
- Factors that tend to escalate change into disputes versus those that support early resolution

## Case Studies and Industry Examples

The consultant will develop three to five synthesized case scenarios based on anonymized research findings and interview insights. These scenarios should illustrate common change order situations, schedule driven impacts, and management responses without identifying specific firms, projects, or individuals.

The intent of these scenarios is to help contractors recognize patterns, risks, and lessons learned rather than replicate project specific or legal strategies.

## Development of the Technical Paper

The consultant will produce a research informed Change Order Manual suitable for inclusion in the SMACNA Contractor Operations Manual. The main body of the paper should be concise and practitioner focused, generally targeting **10 to 20 pages** in length. Supporting materials, such as detailed examples, expanded methodology, reference documents, or supplemental analysis, may be included as appendices and are not intended to count toward the main document length. The paper should be written in clear, practitioner focused language while maintaining analytical rigor.

The manual should include:

- Executive summary highlighting key findings and recurring patterns
- Overview of the research approach and sources
- Discussion of common change drivers and schedule related impacts
- Analysis of proactive change management practices and decision making
- Synthesized case scenarios illustrating real world project conditions



- Practical guidance and considerations for contractors managing change
- Conclusion outlining key takeaways and areas for future consideration

Supporting materials such as one page reference tools, infographics, sample documentation examples, or generalized contract language themes may be included as appendices where appropriate.

## Collaboration and Review

Throughout the project, the consultant will coordinate with SMACNA staff to validate assumptions, review interim findings, and ensure the publication aligns with member needs and expectations. SMACNA recognizes the challenges associated with primary data collection in the construction industry and intends to collaborate with the selected consultant to support the success of the research. The project schedule, including research and drafting phases, will be refined collaboratively with the selected consultant as the work progresses.

## Deliverables and Review Milestones

Phase	Deliverable	Review Point
<b>Phase 1</b>	Research design and survey or interview instruments	SMACNA staff review
<b>Phase 2</b>	Interim findings memorandum summarizing emerging themes	SMACNA staff review
<b>Phase 3</b>	Draft technical paper for the Contractor Operations Manual	Committee review
<b>Phase 4</b>	Final technical paper and appendices	Final approval

## Thank You for Your Proposals

We would like to extend our sincere appreciation to all prospective consultants who take the time to submit proposals in response to this Request for Proposals (RFP). Your interest in contributing to our project, "*SMACNA Change Order Manual for the Contractor Operations Manual*", is invaluable to us. We recognize the effort and expertise that goes into preparing a proposal and are grateful for your participation in this endeavor.

## Submission Instructions

### Budget Guidance

Proposers should submit a detailed budget that clearly describes assumptions, level of effort, and cost drivers associated with the proposed scope of work. SMACNA anticipates that proposals for the base scope of this project will generally fall within a range of **\$25,000 to \$20,000**.



Proposals may include optional enhancements or alternate approaches, provided the base scope is clearly defined. SMACNA reserves the right to negotiate scope, schedule, and budget with the selected consultant to ensure alignment with project objectives and available funding.

### Proposal Evaluation Criteria

Proposals will be evaluated based on overall quality, relevance, and alignment with the objectives of this RFP. Evaluation criteria may include, but are not limited to:

- Demonstrated experience with contractor operations and project execution, beyond claims or dispute consulting alone
- Evidence of applied industry research capability, including surveys, interviews, or practice-based analysis
- Prior experience producing publications for trade associations, standards bodies, or similar industry organizations
- Clarity and feasibility of the proposed research approach and methodology
- Demonstrated understanding of the construction industry context and SMACNA membership
- Overall value and reasonableness of the proposed budget

SMACNA may consider factors holistically and is not obligated to select the lowest-cost proposal.

To present your proposal, please submit it via the following form: [SMACNA RFPs](#). The deadline for proposal submissions is 3/1/2026 at 5PM Central. We kindly request that you adhere to this deadline. Late submissions may not be considered. If you have any questions or require clarifications regarding the RFP or the submission process, please do not hesitate to reach out to Travis Voss at [tvoss@smacna.org](mailto:tvoss@smacna.org) for assistance. We look forward to receiving your proposals and embarking on this important research journey together.