

Improving Capital Project Delivery-COVID Market Lessons

*Material Delays are
predictable*



Plan Better



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Introductions

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Agenda

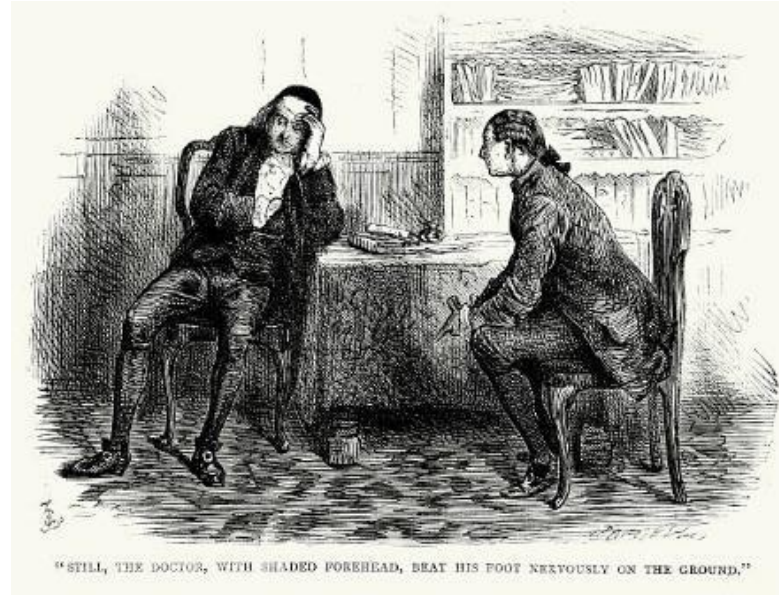
- **Success Stories**
- **Plan to avoid equipment delays**
- **Long Term Capital Strategy**
- **Plan to Fail**



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Stories from the Summer of 2023 Versus 2022



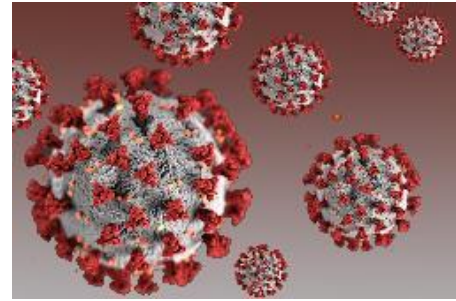
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Did you
plan
better?



Did you get a Booster?



Did you meet
your budget?

Friends with
the enemy?



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Costs are up
over 40% since
COVID Protocols
Ended



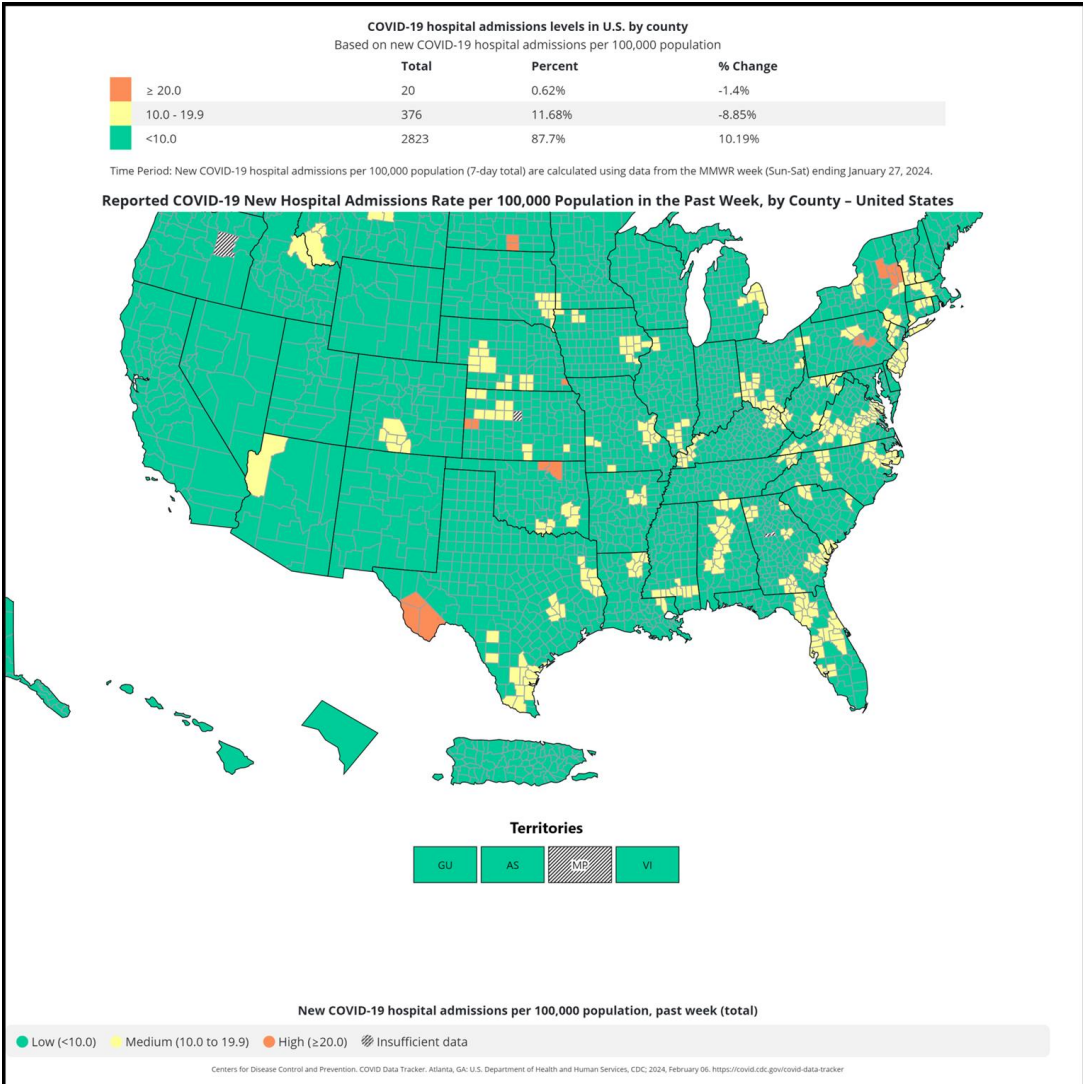
Did you cancel any projects?



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COVID Cases are down



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Costs are not coming down

What does inflation have in common with COVID?



Costs are more predictable



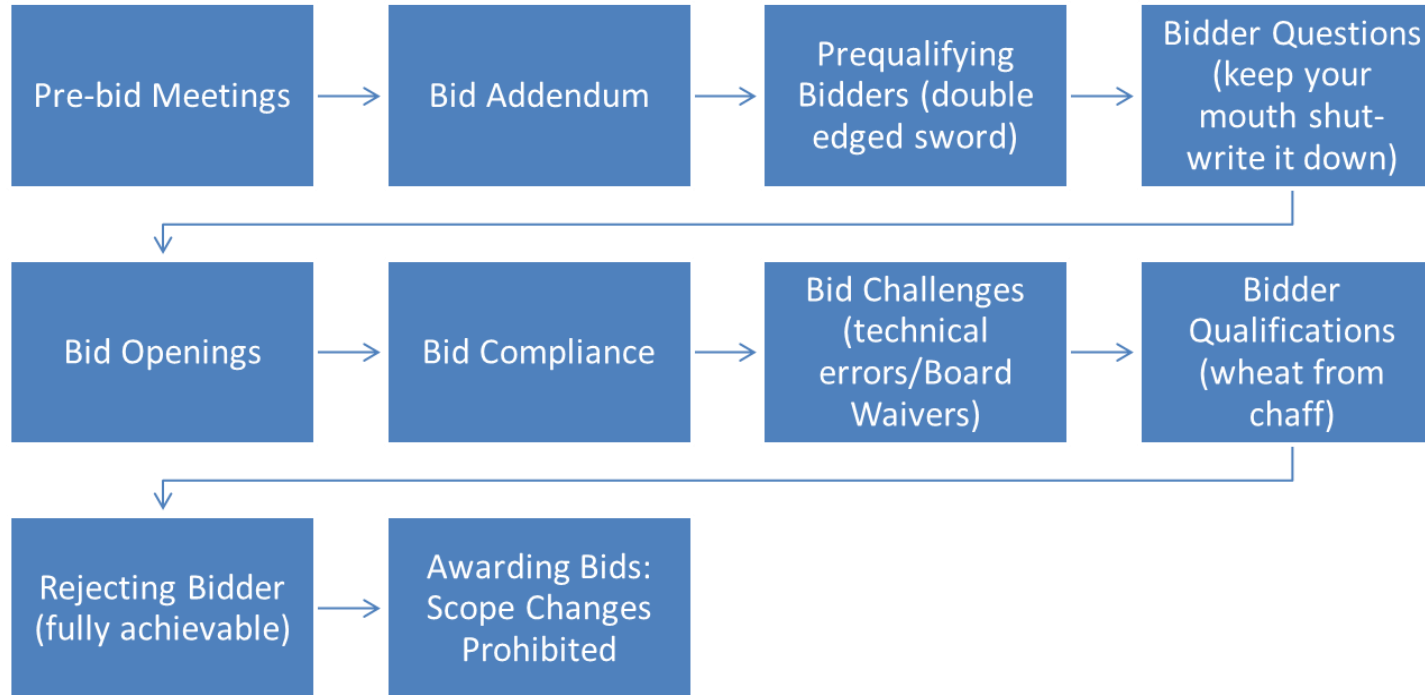
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Securing Equipment

Lump Sum Bid Equipment



Another Option?



Summer 2023

How many months out did you bid for Summer 2023?



Weak contractor awarded?

Issues uncovered?



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Summer 2023

Success Stories

Equipment Issues

Cooperative Purchasing

Delivery Promise Kept

Ability to Track



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Bidding 2024

Which month did you bid for Summer 2024?



Good Coverage?

Issues?



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Addison SD 4 - 2023 Stone Elementary Supply Chain Management

Cooperative
Purchase
Completed
September
2022



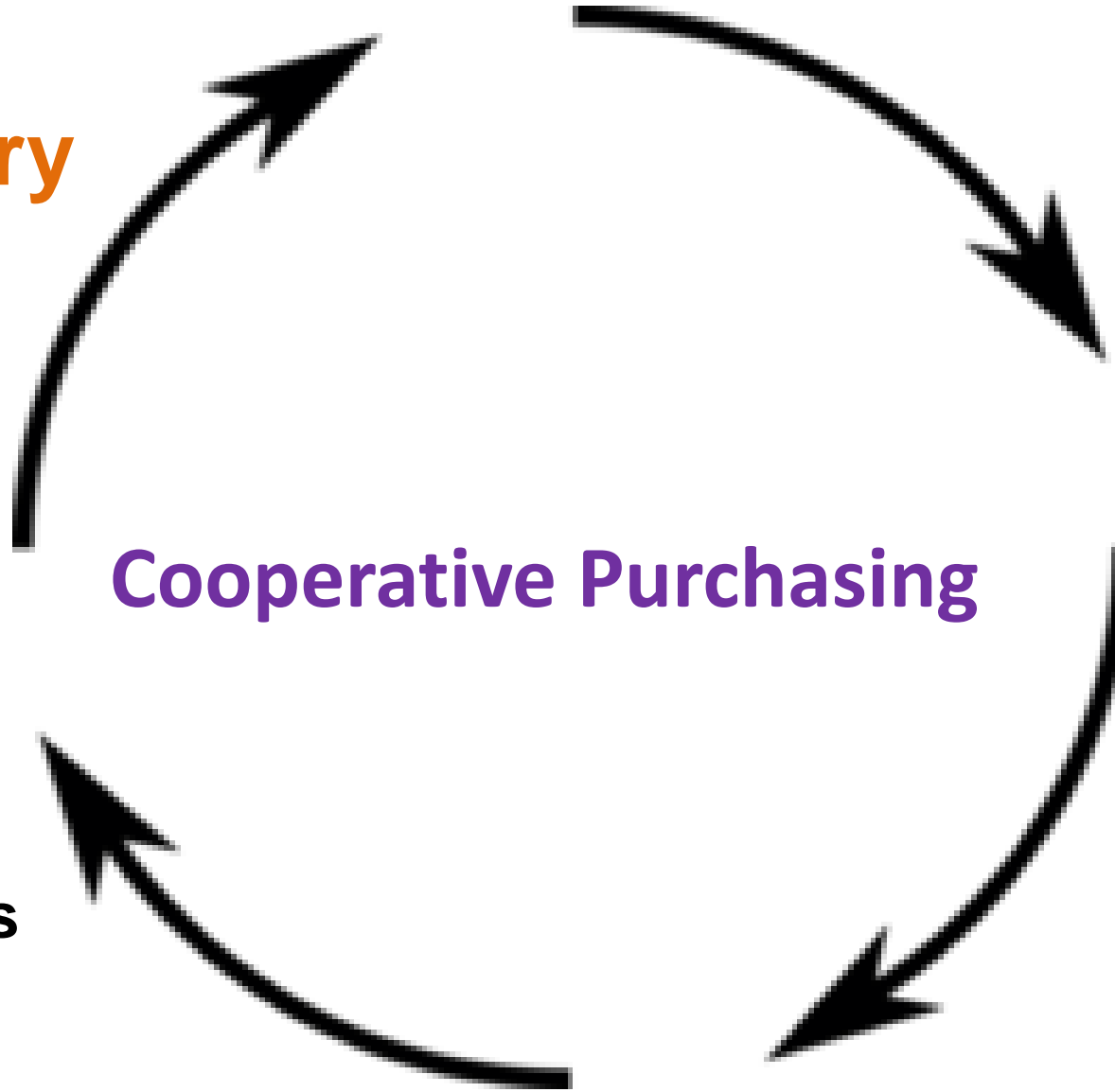
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Stone Elementary

Five Year Plan



In-Person Ground
Rules Meeting

Cooperative Purchasing

Feet to the Fire

Weekly Updates



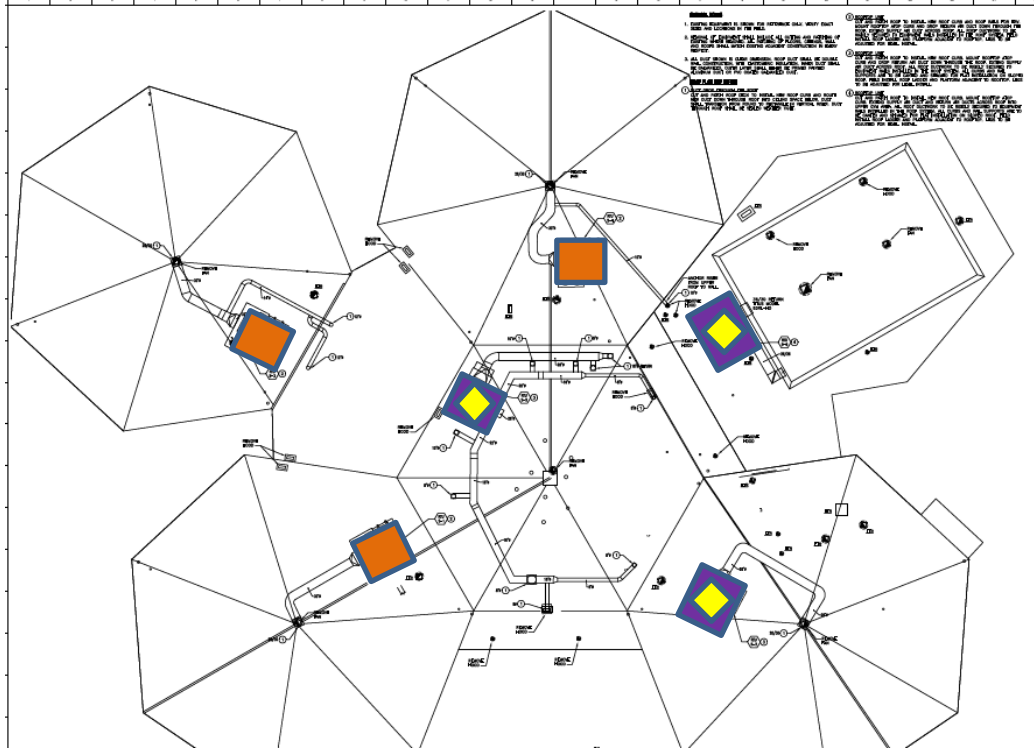
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Stone Elementary School

Equipment Arrived Early



-  RTU Arrives June for Summer 2023 Installation **May 2023**
-  RTU Arrives August for Fall 2023 Installation **June 2023**
-  ERU Arrives November for Summer 2024 Installation **August 2023**



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Fullerton Elementary

Five Year Plan



Arriving
February
2024

Cooperative Purchasing

Mechanical
Contractor
Storing

Purchase
January 2023



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Cooperative Purchasing Control/Strengths

- **Lead times are known and traceable**
- **Shop drawings are eliminated-saving 10 weeks**
- **Dependence on “capable” trade contractor reduced.**



Cooperative Purchasing- Logistics

Order 8-12 months in advance

District lays out cash



EXTRA COST



Less bidder interest?

Storage by Contractor?

Storage at District?



Cooperative Purchasing- Design

**Equipment
is the focus**

**Design Process
Starts Sooner**



**District lays out cash-
Target Board Meeting**

**Project Out
to Bid?**



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Implement an 18 -24 Month Planning Process



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Major Tasks For Renovation

Capital Work Selection

1-2 Months Select Capital Work

1 Month Board Approves Capital Work/Concept Budget

Capital Work Design/Award

11-12 Months Estimating/Design

2-3 Months Cooperative Purchasing

2-3 Months Bid Phase Summer Work

1-2 Months BOE Award Summer Work

Capital Work Implementation

6-8 Months Preparing Summer Work Implementation

3-6 Months Summer Work Implementation



Looking Two Years out:

Review Master List of Needs for Board Consideration

Verify and Update Costs

Reprioritize the needs as required

Prepare Recommendations for following Summer

Every Year



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Planning Tasks Every Year



ADMINISTRATION Estimating/Design Completion Summer

ADMINISTRATION Construction Summer 20XX

20XX Summer Final Implementation Planning

Summer 20XX Work Implementation

ADMINISTRATION	 Co-Op Purchase	
Select Equipment		
		 BOE Award Purchase

ADMINISTRATION	 Bid Summer 20XX	
Bid Phase Summer 20XX Work		
		 BOE Award Summer 20XX

	 Capital Planning 20XX	BOE
Select Capital Work Summer 20XX from Capital Plan		
		 Board Approves 202XX Capital Work/Concept Budget



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**Administration
does all the
heavy lifting
and work**



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Calendar Year 2024

implement 2024 summer program

design/bid 2025 program

planning 2026 program

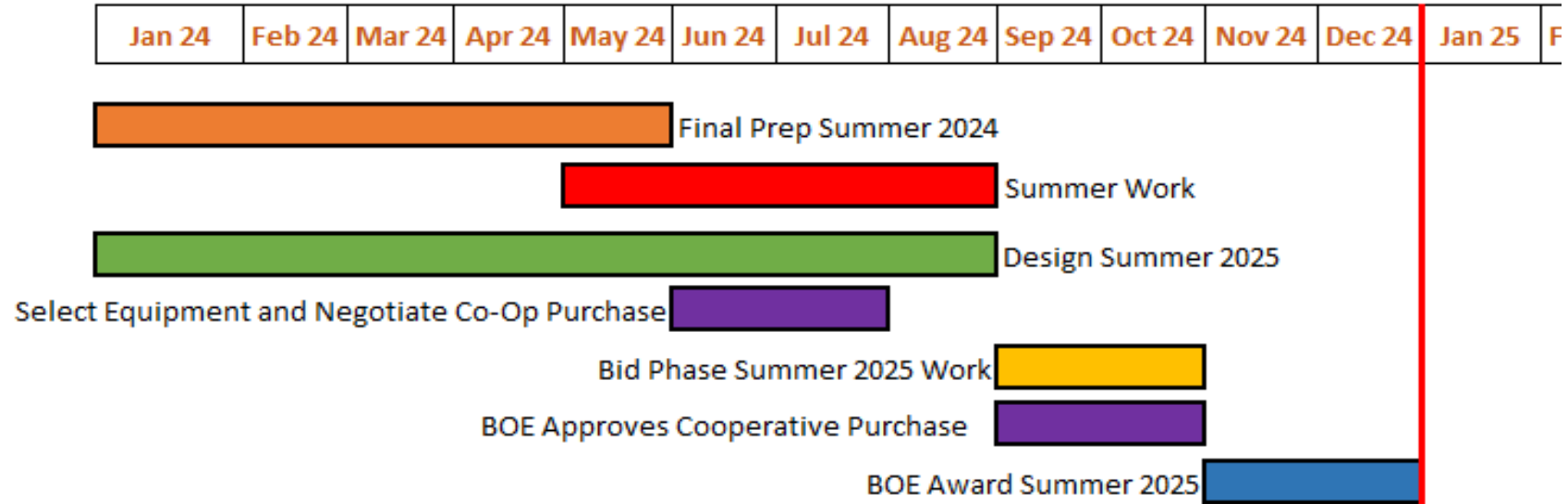


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Current School Year: 2023-2024



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Administration Updates 2025 Design Progresses at various stages

Architect Designs For Work 2025

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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ADMINISTRATION



Estimating/Design Completion Summer

Update: Design Status

Confirm: Bid Release Award to BOE

Confirm: Construction Timeline for Summer 2025



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Cooperative Purchase 2025 as Design Progresses

Architect Designs For Work 2025



ADMINISTRATION	Co-Op Purchase	
Select Equipment	[Purple bar]	
		BOE Award Purchase



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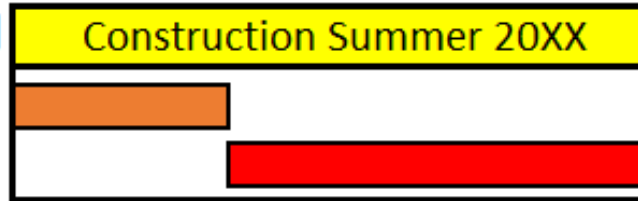
During Construction 2024 Administration is:



ADMINISTRATION

Construction Summer 20XX

20XX Summer Final Implementation Planning



Summer 20XX Work Implementation

Review Master List of Needs for Board Consideration

Verify and Update Costs

Reprioritize the needs as required

Prepare Recommendations for Summer 2026



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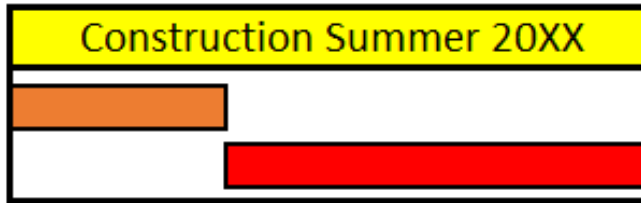


Administration Plans 2026 with BOE:



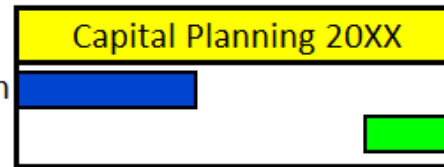
ADMINISTRATION

20XX Summer Final Implementation Planning



Summer 20XX Work Implementation

Select Capital Work Summer 20XX from Capital Plan



BOE

Board Approves 202XX Capital Work/Concept Budget

Review Master List of Needs for Board Consideration

Verify and Update Costs

Reprioritize the needs as required

Prepare Recommendations for Summer 2026



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At Completion Construction 2024:

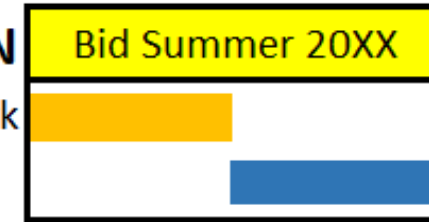


ADMINISTRATION



Estimating/Design Completion Summer

ADMINISTRATION



Bid Phase Summer 20XX Work

BOE Award Summer 20XX

Summer 2025 is Released for Bid

Bids are Received

Award Recommendation Prepared

Board Awards Summer 2025



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At Completion Construction 2024:

Design Process Starts for 2026



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Administration Updates 2026 Design Progresses at various stages

Architect Designs For Work 2026



Update: Design Status

Confirm: Bid Release Award to BOE

Confirm: Construction Timeline for Summer 2026



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Making Changes in Design

Lead times will vary

Materials may be late

A sacrifice or additional cost may happen



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Evaluation for Change During Design

- **Schematic Design**
- **Design Development**
- **Construction Documents**
- **Bidding**



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What's the cost at each Stage?

Schematic Design

Cost

Outcome Enhanced



- Delays bid
- Architects Fees
- Delays Design
- Causes Redesign

- Prevents disaster
- **Increases odds of success**
- **Keeps project alive**
- Holds bidders



What are the Strategies at each Stage?

Schematic Design

Cost

Outcome Enhanced

- **Revise Scope**
- **Consider Materials**
- **Consider Product Selection**
- **Revise Schedule**
- **Consider Phasing and Procurement Strategies**
- **Communicate to Admin/BOE**

- **Delays bid**
- **Architects Fees**
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What's the cost at each Stage?

Design Development
Cost
Outcome Enhanced



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Construction Documents
Cost
Outcome Enhanced



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Construction Documents

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Bidding

Cost

Outcome Enhanced



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What are the Strategies at each Stage?

Bidding

- Revise Scope
 - Consider Materials
 - ~~Consider Product Selection~~
 - Revise Schedule
 - Consider Procurement Strategies
 - ~~Communicate to Admin/BOE~~
- Delays bid
 - Architects Fees
 - Delays Design
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Questions and Answers

We thank you for your time!



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Presenters:

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