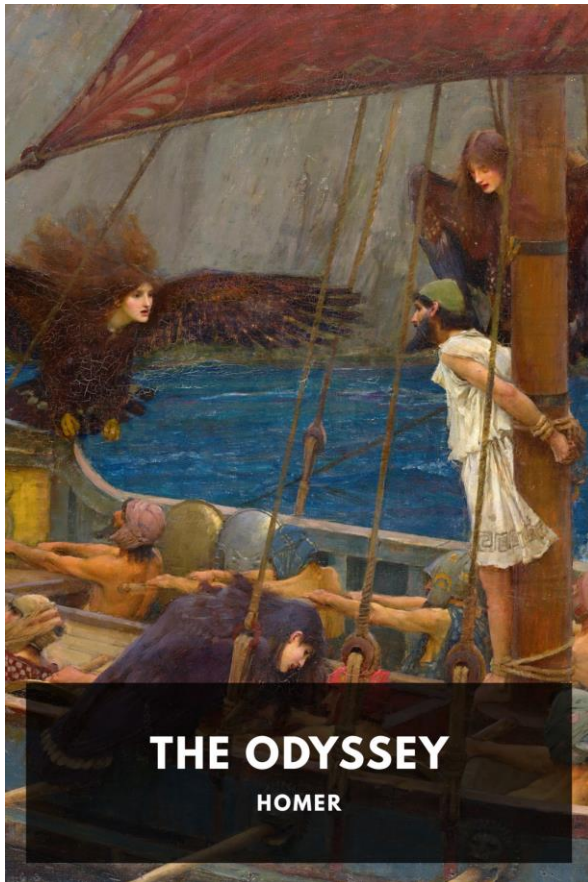


Overcoming Material Delays



**Odysseus Returned
to Greece Easier**

*Material Delays are
not Mythology*

Introductions

Dan Mortensen, Moderator/Speaker

- *Director of Facilities, Lake Forest Districts 67 and 115*

Alison Andrews, Speaker

- *Associate, Wold Architects and Engineers*

Terry Fielden, Speaker

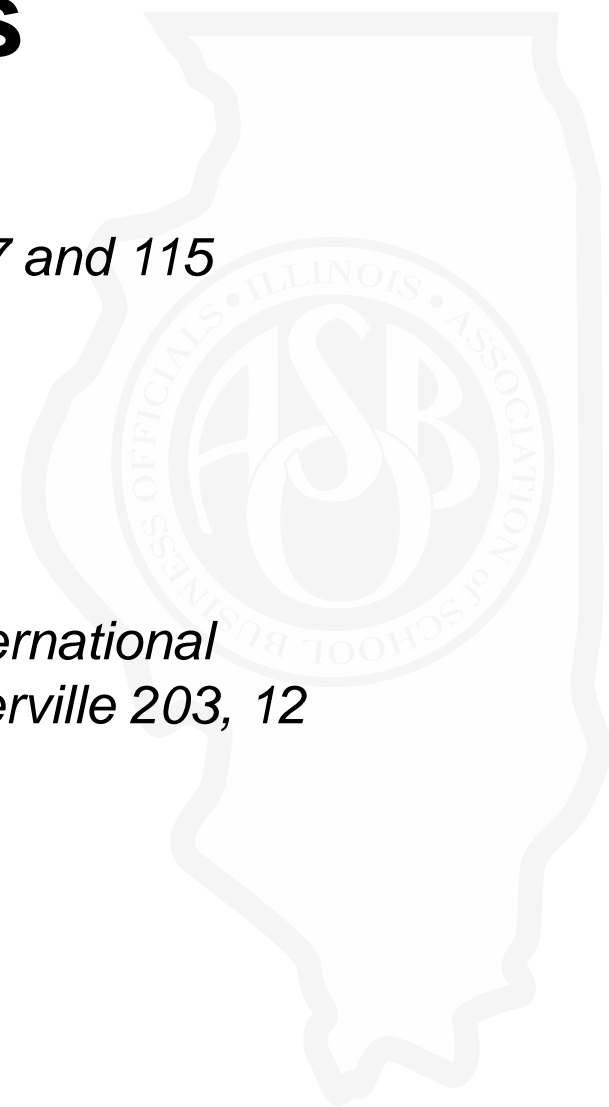
- *Vice President, Director K-12 Education, International Contractors, Inc., Retired Board Member Naperville 203, 12 years*

Kenneth Florey, Speaker

- *Attorney, Robbins Schwartz*

Cathy Johnson, Speaker

- *CSBO*



Agenda

- **Why are there random material delays?**
- **Who can we blame?**
- **What are some strategies to overcome?**
- **The new definition of success**

But First.....we need to know..

- Did you open school on time?
- Did you pay extra money?
- Did something surprise you?
- Did you learn anything?



Keep your
upcoming
projects “top of
mind”



**We want to hear the project
approach for Summer 2023**

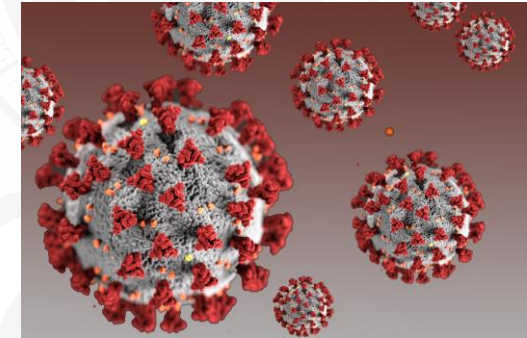
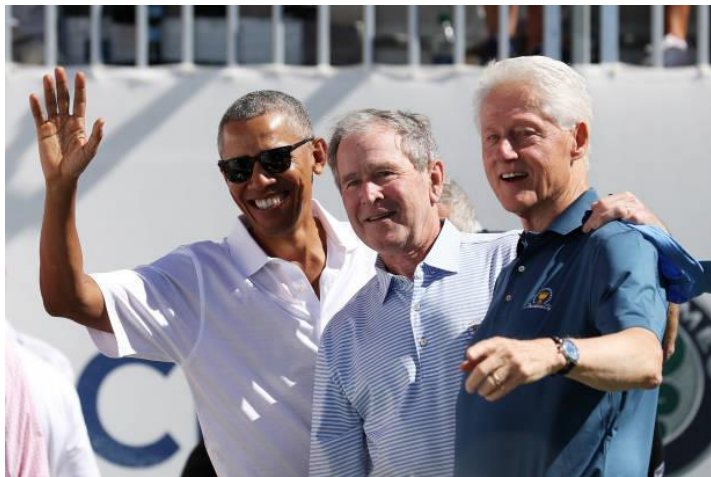
Who is to blame...?

- Too much work?
- Too much money?
- Too high of demand?
- Not enough workers?





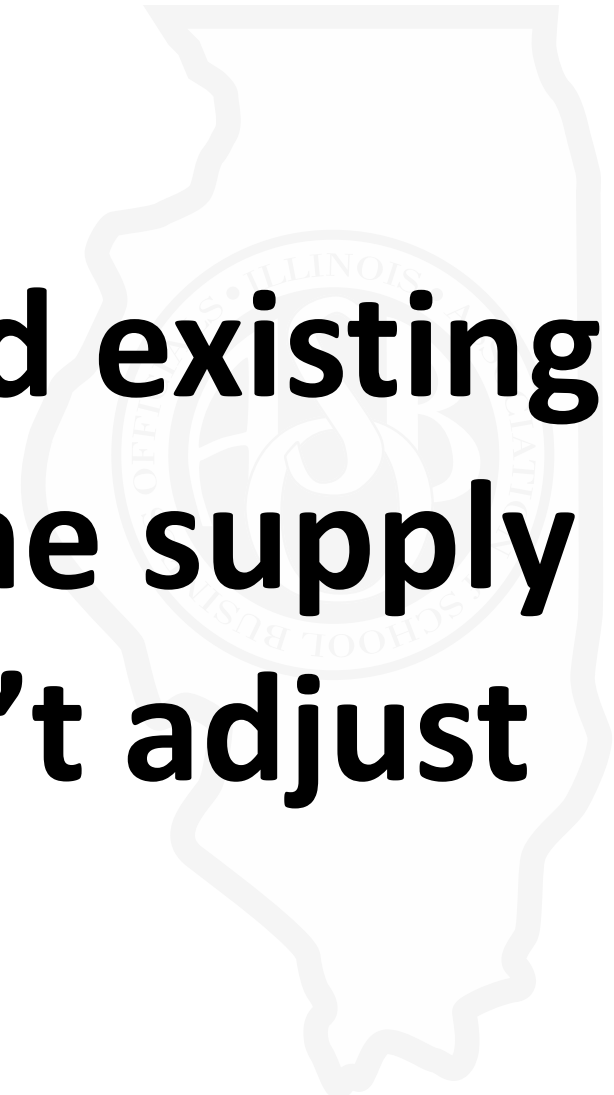
I DID THAT!



Well...not likely any single of the
foregoing issues...

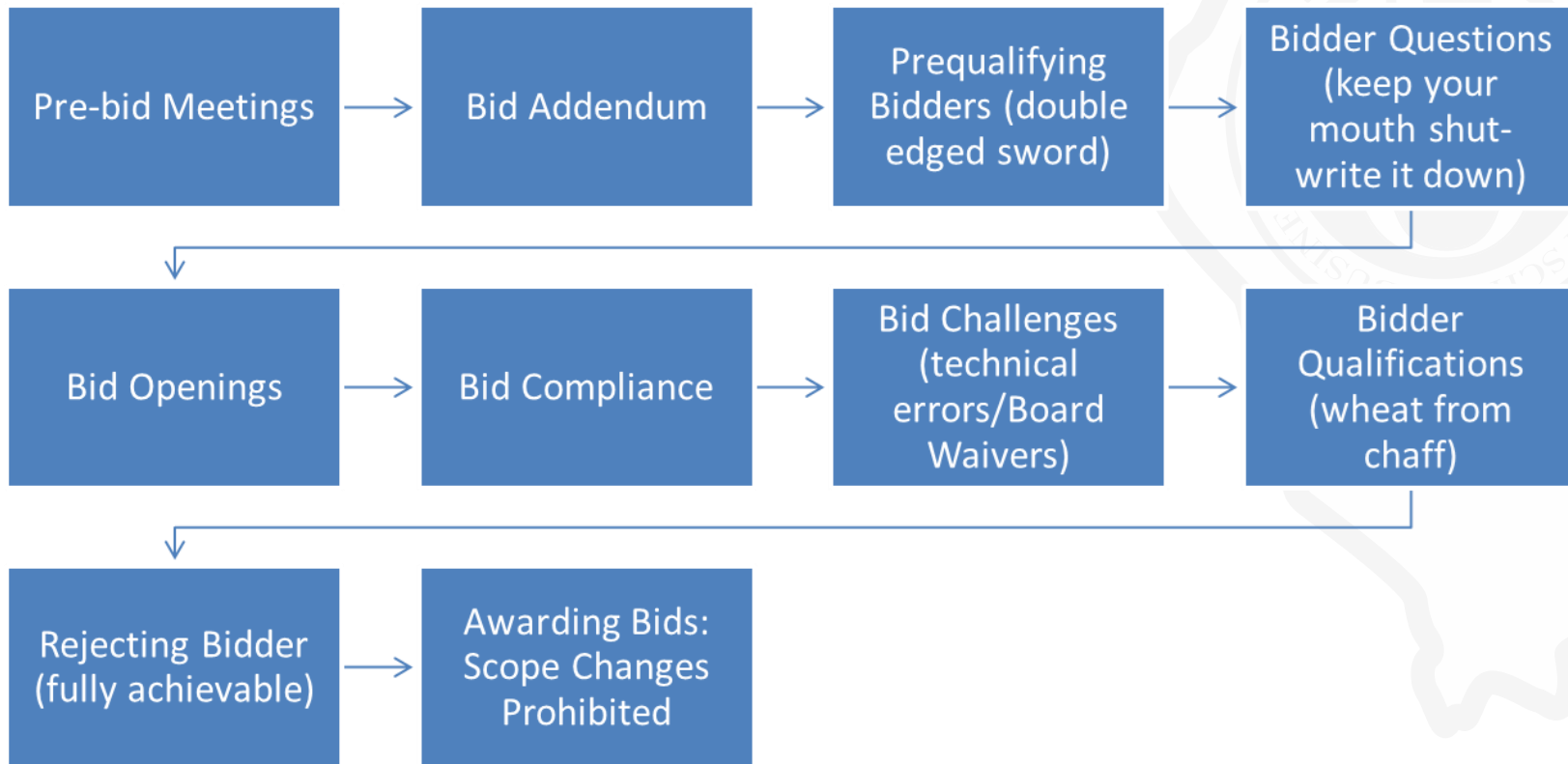
**China experienced the virus first
and is the world's major
manufacturer**

**The virus revealed existing
weakness, and the supply
chain won't/can't adjust**



Bidding and Securing Materials

Strength or Weakness?



Bidding and Securing Materials

- Bidding takes 6-8 weeks
- Submittals take 8-10 weeks
- Weak contractor awarded?
- Cooperative purchasing?



Cooperative Purchasing

- **Legalities**
- **Board buy-in**
- **Formulating a Board Motion**
- **Time Savings**



Cooperative Purchasing

Can School Districts still use cooperative purchasing?

- Yes, in Illinois, two statutes authorize Cooperative Purchasing:
 - Joint Purchasing Act (30 ILCS 525/1) and
 - Article 28A of the School Code (105 ILCS 5/28A)

Governmental Cooperative Purchasing

What selection criteria can a cooperative use?

All purchases, orders or contracts shall be awarded to the lowest responsible bidder or **highest-ranked proposer**, taking into consideration:

- The **qualities** of the articles or services supplied;
- Their **conformity** with the specifications;
- Their **suitability** to the requirements of the participating governmental units
- The **delivery** terms.

Governmental Cooperative Purchasing

Strategies for Success with Joint Purchasing options:

- Get informal quotes or estimates from local vendors/contractors first. It may be cheaper to use the traditional bidding method.
- Look at the offerings of all of the cooperatives before deciding to “qualify” one particular cooperative.

Cooperative Purchasing

- **Pit Falls**
- **Uncharted Territory**
- **Tracking**
- **Success/Failure**



Case Study: Addison School District 4

Stone Elementary
First in a Series of
Five HVAC Upgrades



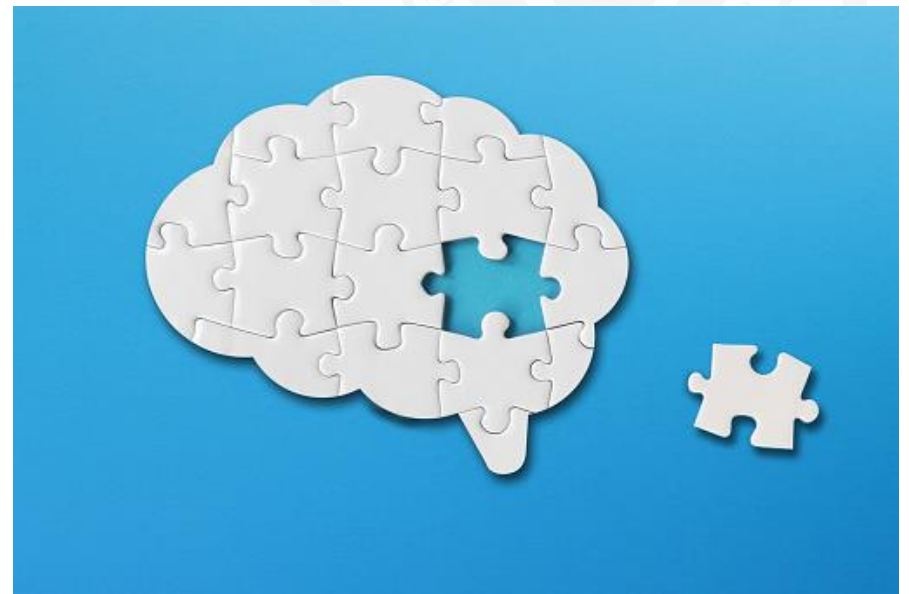
Stone Elementary School

- **Summer 2022-HVAC equipment was late or MIA**
- **Main RTU was delivered without fans and VFD's.
Change Order Temp Usage**

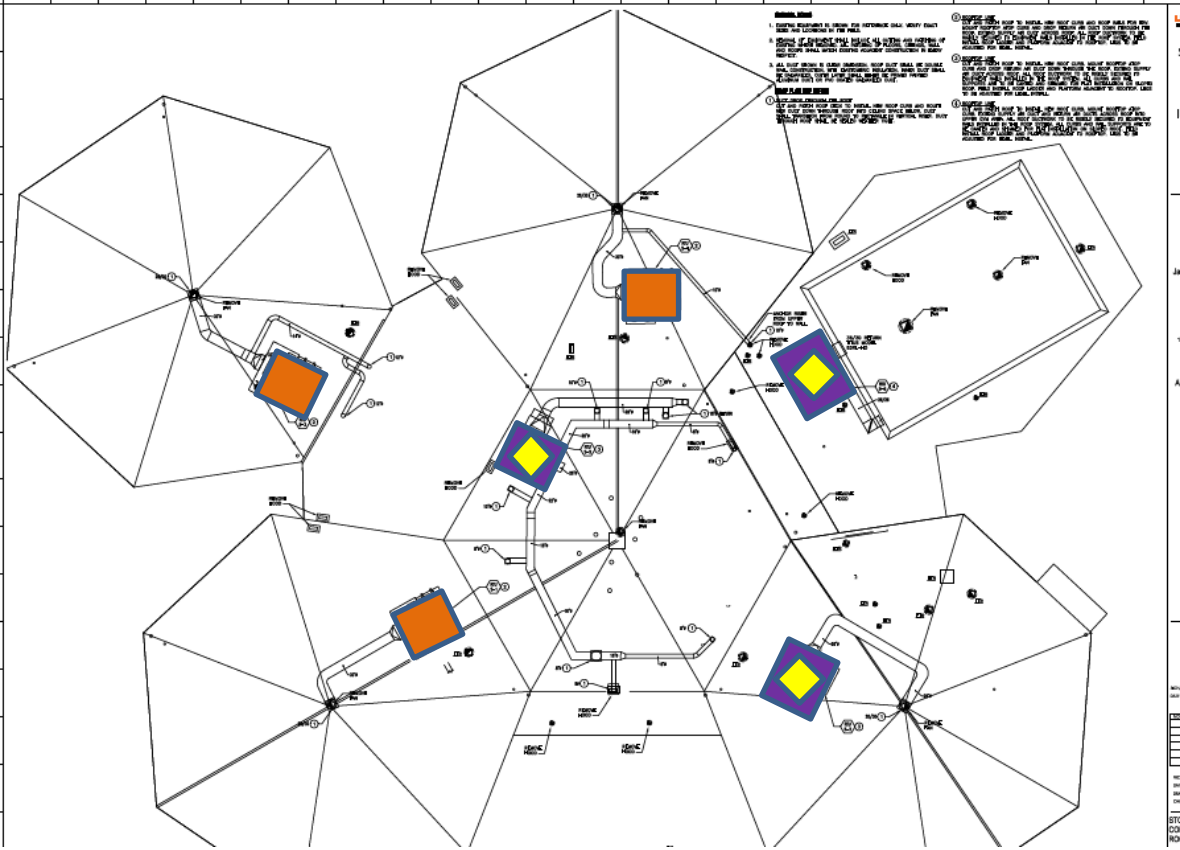


Stone Elementary School

- **Replacement of six RTU's**
- **3 “normal” RTU's 25-30 weeks lead time**
- **3 RTU's with “Energy Recovery Units”
40-45 weeks lead time**
- **Energy Recovery Units
75-80 weeks**



Stone Elementary School



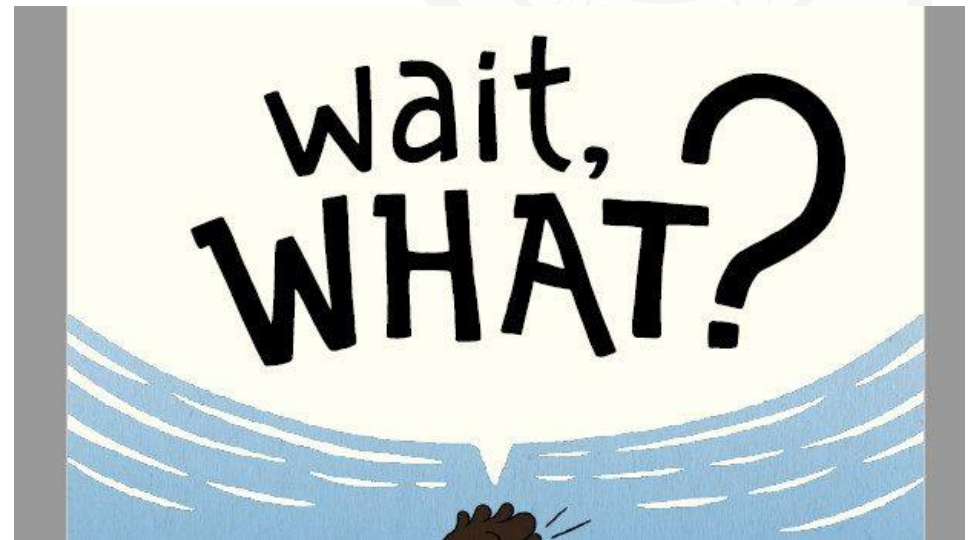
 RTU Arrives for Summer 2023 Installation

 RTU Arrives for Fall 2023 Installation

 ERV Arrives for Summer 2024 Installation

Stone Elementary School - Bid Approach

- District was willing to do “traditional bid in August 2022”
- Switched to CM based on horrific Summer 2022-
delayed release to “re-think”



Stone Elementary School - Bid Approach

- **Ultimately-Cooperative Purchasing was Selected**
- **Board approved purchase pending approval by Administration**



Stone Elementary School - Logistics

- Existing Unit Ventilators remain until RTU's are set/functional
- Fall delivery of RTU's requires weekend and night work



**Sorry
for the
Inconvenience!**

Stone Elementary School - Logistics

- Existing Unit Ventilators Removed Summer 2024

EXTRA COST

- ERV's will be installed in Summer 2024



Stone Elementary School Control/Strengths

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



Keep your
upcoming
projects “top of
mind”



**We want to hear the project
approach for Summer 2023**

Making Changes in Design

- **Lead times will vary**
- **Materials may be late**
- **A sacrifice or additional cost may happen**



Evaluation for Change During Design

- Schematic Design
- Design Development
- Construction Documents
- Bidding



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**
- **Delays Design**
- **Causes Redesign**
- **Prevents disaster**
- **Increases odds of success**
- **Keeps project alive**
- **Holds bidders**

What's the cost at each Stage?

Design Development
Cost
Outcome Enhanced



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

- **Prevents disaster**
- **Increases odds of success**
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What are the Strategies at each Stage?

Design Development

Cost

Outcome Enhanced

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What's the cost at each Stage?

Construction Documents

Cost

Outcome Enhanced



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Cost

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What's the cost at each Stage?

Bidding

Cost

Outcome Enhanced



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

- Prevents disaster
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- Keeps project alive
- Holds bidders

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

Let's Discuss your “top of mind” Projects



**Let's debate your project
approach for Summer 2023**



Questions and Answers

We thank you for your time!

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