



March 8 - 78F - “A Tale of Flexibility”

The Expansion and Renovation of Windsor Park

MOMENTUM
**2023 ANNUAL
MEETING & EXPO**

Renaissance Schaumburg
Convention Center - Schaumburg, IL



Randy E. Gross
Vice President Project Development
Covenant Living Communities & Services

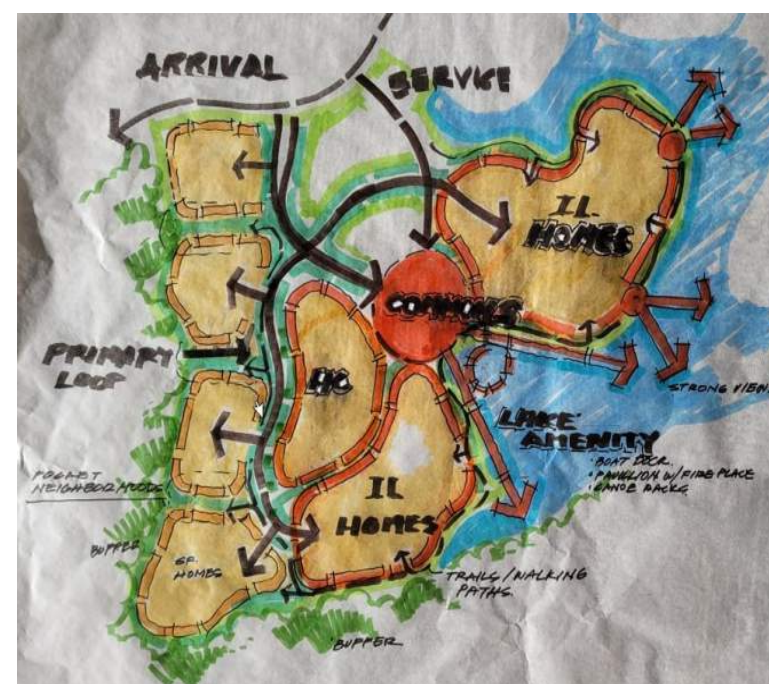


Jose A. Montalvo
Senior Associate & Senior Manager
THW Design



IN THE BEGINNING

THE PLAN



The Purpose

- Expand the existing community to serve a growing need.
- Update the community to maintain market share and position.
- Strengthen existing services and extend their reach to the greater community.
- Improve the home where our residents live.
- Provide our staff with the environment in which to continue doing their best work.

Existing Conditions



PORTE COCHÈRE

SIDE ENTRY

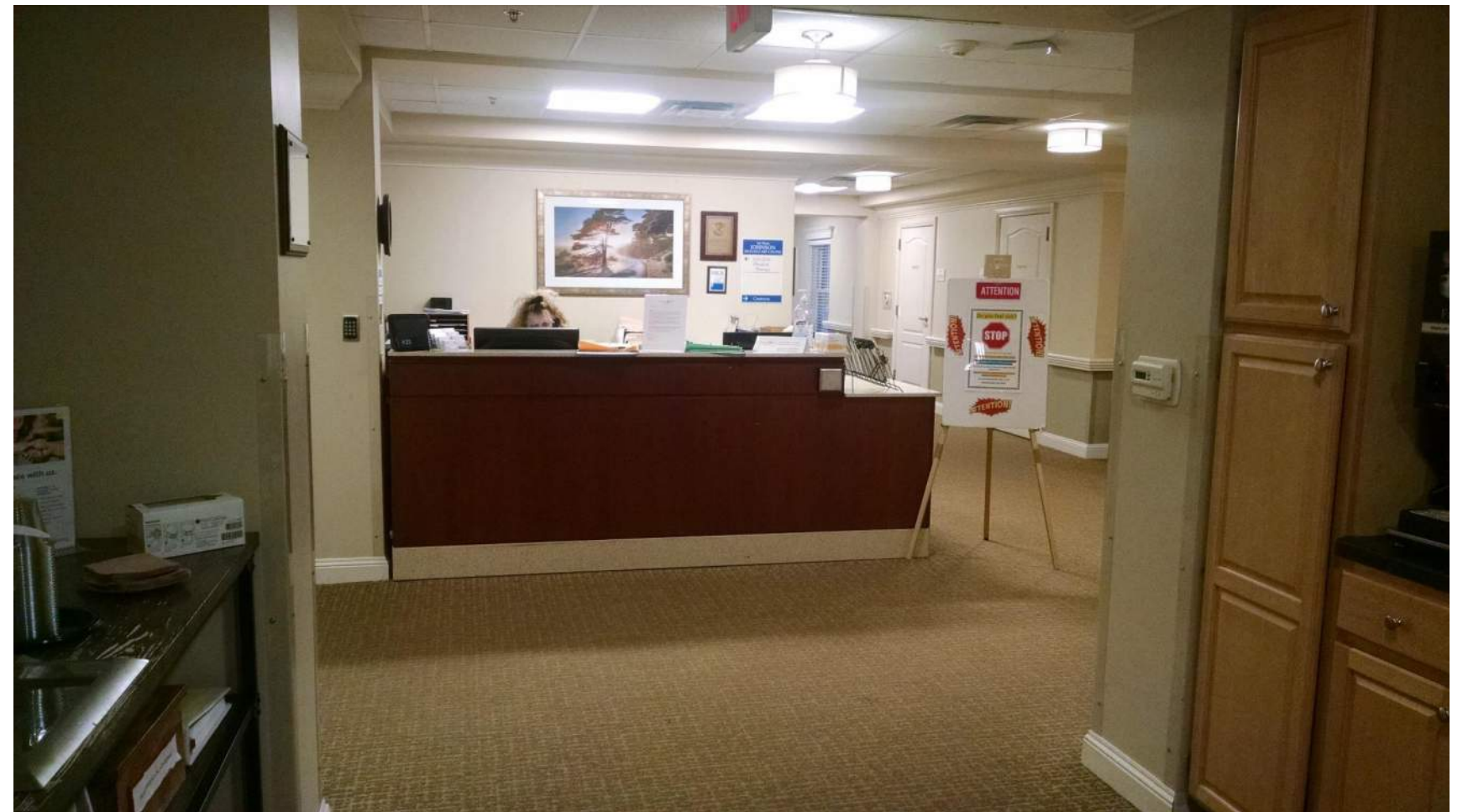


Existing Conditions



ENTRY LOBBY

RECEPTION AREA



Existing Conditions



DINING AREA

PHYSICAL THERAPY

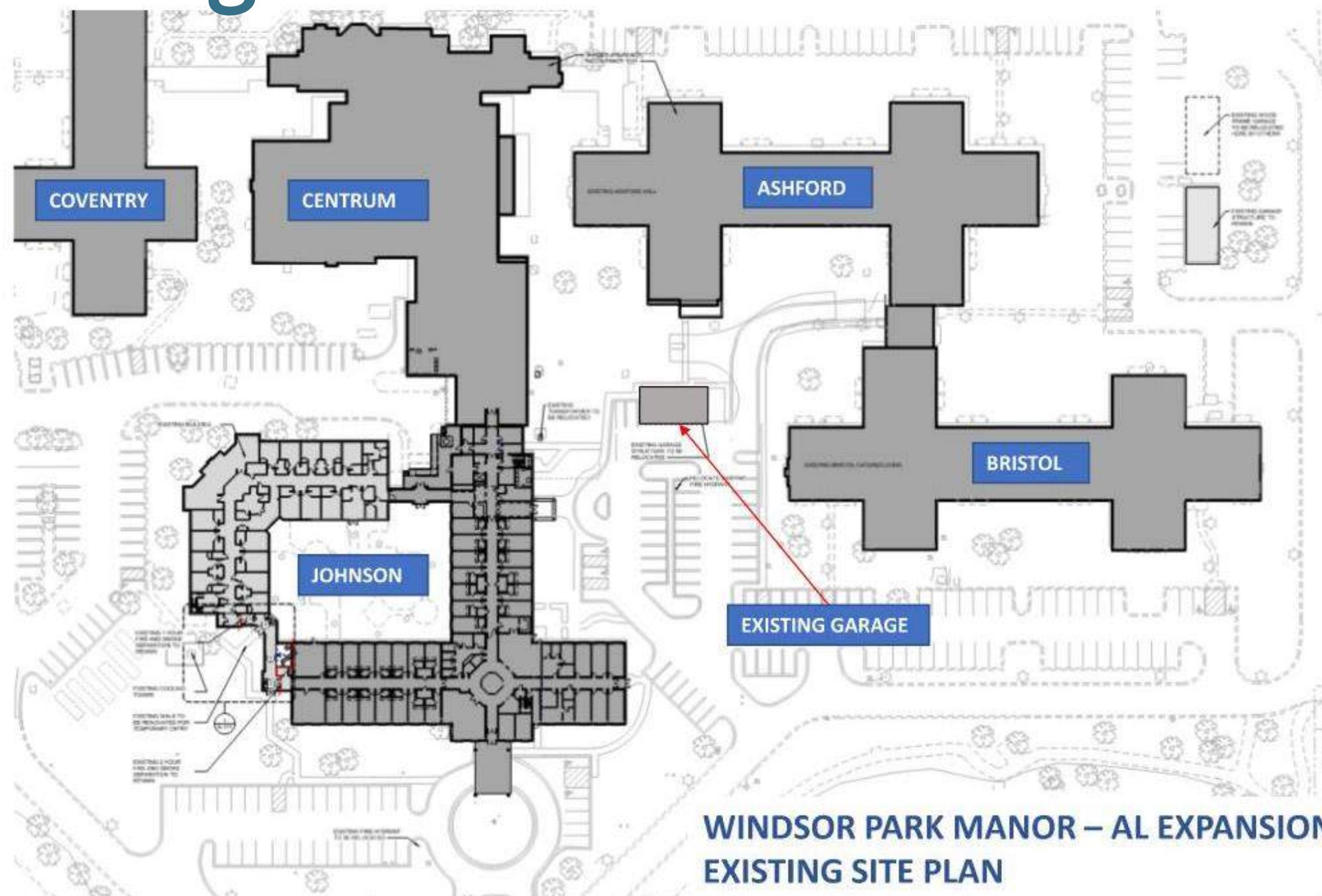


The Plan

Included Multiple:

- Phases (1A, 1B, 2A, 2B, 2B.2, 2B.3, 3A, 3B).
- Permit Document Packages (Renovations, Site, Foundations, Building)
- Funding Sources (Bond and CapX)
- Review Agencies (IDPH, Village of Carol Stream, DuPage County)

Phasing



PROJECT SCOPE:

PACK 1

1. OVERALL SIDE WORK
2. ADDITIONAL PARKING NORTH SITE
3. RELOCATION OF EXISTING GARAGE
4. NEW TEMPORARY HC ENTRANCE.

PACK 2A

1. RENOVATE EXISTING MC COMMON SPACES ON 2ND FLOOR AS 2 NEW MC RESIDENT UNITS

PACK 2B

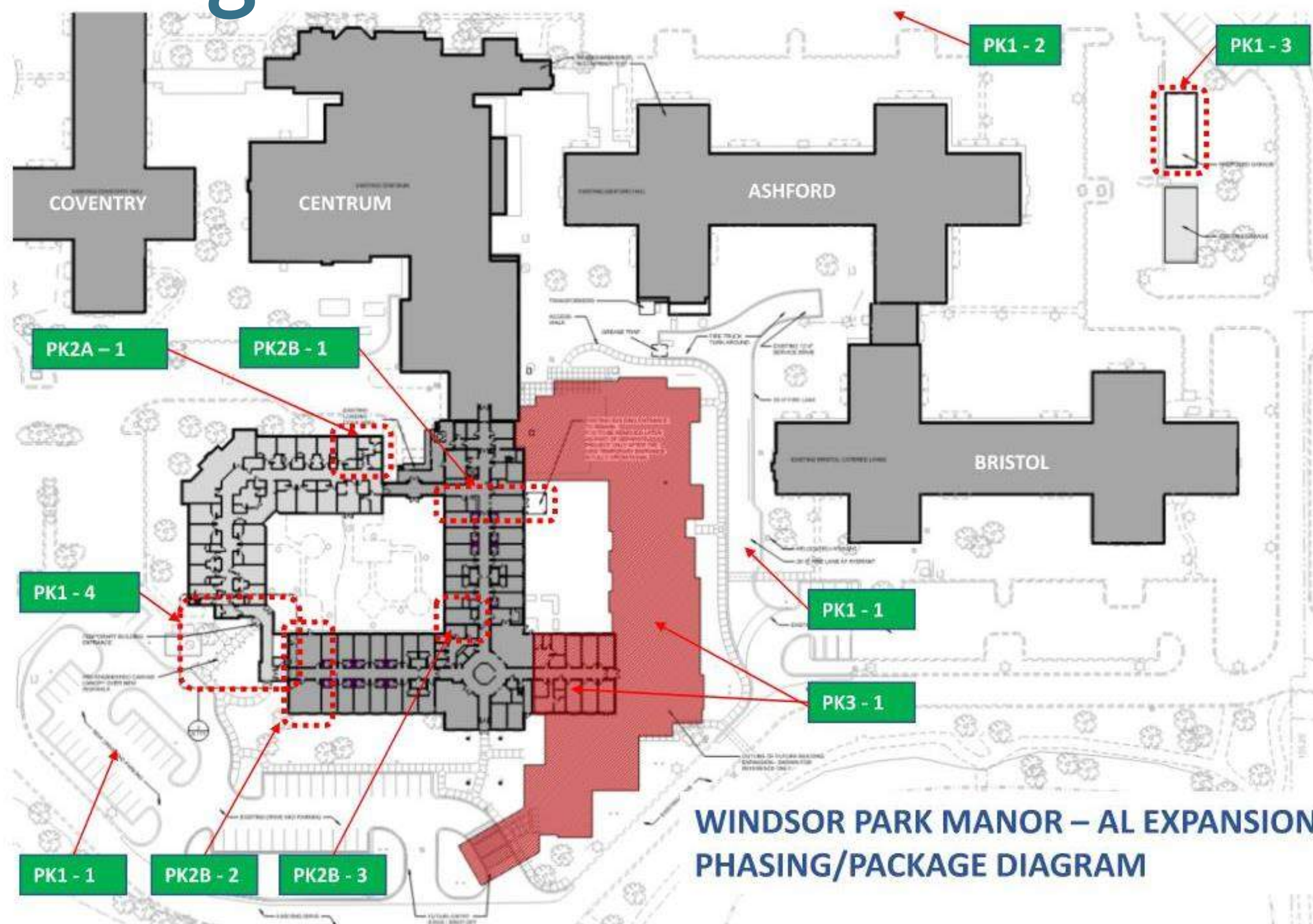
1. RENOVATE EXISTING HC BUILDING ENTRY & RECEPTION AS 2 NEW PRIVATE SN RESIDENT UNITS.
2. RENOVATE EXISTING PT SPACES AS 4 NEW PRIVATE SN RESIDENT UNITS.
3. RENOVATE EXISTING AL PANTRY ON 2ND FLOOR AS 1 NEW PRIVATE AL UNIT

PACK 3

1. DEMOLISH EXISTING SE WING OF HC BUILDING AND BUILD NEW 2-STORY AL EXPANSION



Phasing



PHASING DIAGRAM

PACK 1

1. OVERALL SIDE WORK
2. ADDITIONAL PARKING NORTH SITE
3. RELOCATION OF EXISTING GARAGE
4. NEW TEMPORARY HC ENTRANCE.

PACK 2A

1. RENOVATE EXISTING MC COMMON SPACES ON 2ND FLOOR AS 2 NEW MC RESIDENT UNITS

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PACK 3

1. DEMOLISH EXISTING SE WING OF HC BUILDING AND BUILD NEW 2-STORY AL EXPANSION



Level 1

Legend

COLOR KEY
ADMIN
BUILDING SUPPORT
CIRCULATION
DINING
FOOD SERVICE
LOBBY
NURSING & SUPPORT
OTHER
PATIOS / PORTE COCHERES (COVERED)
RESIDENTIAL UNITS
RESIDENTIAL USE
WELLNESS



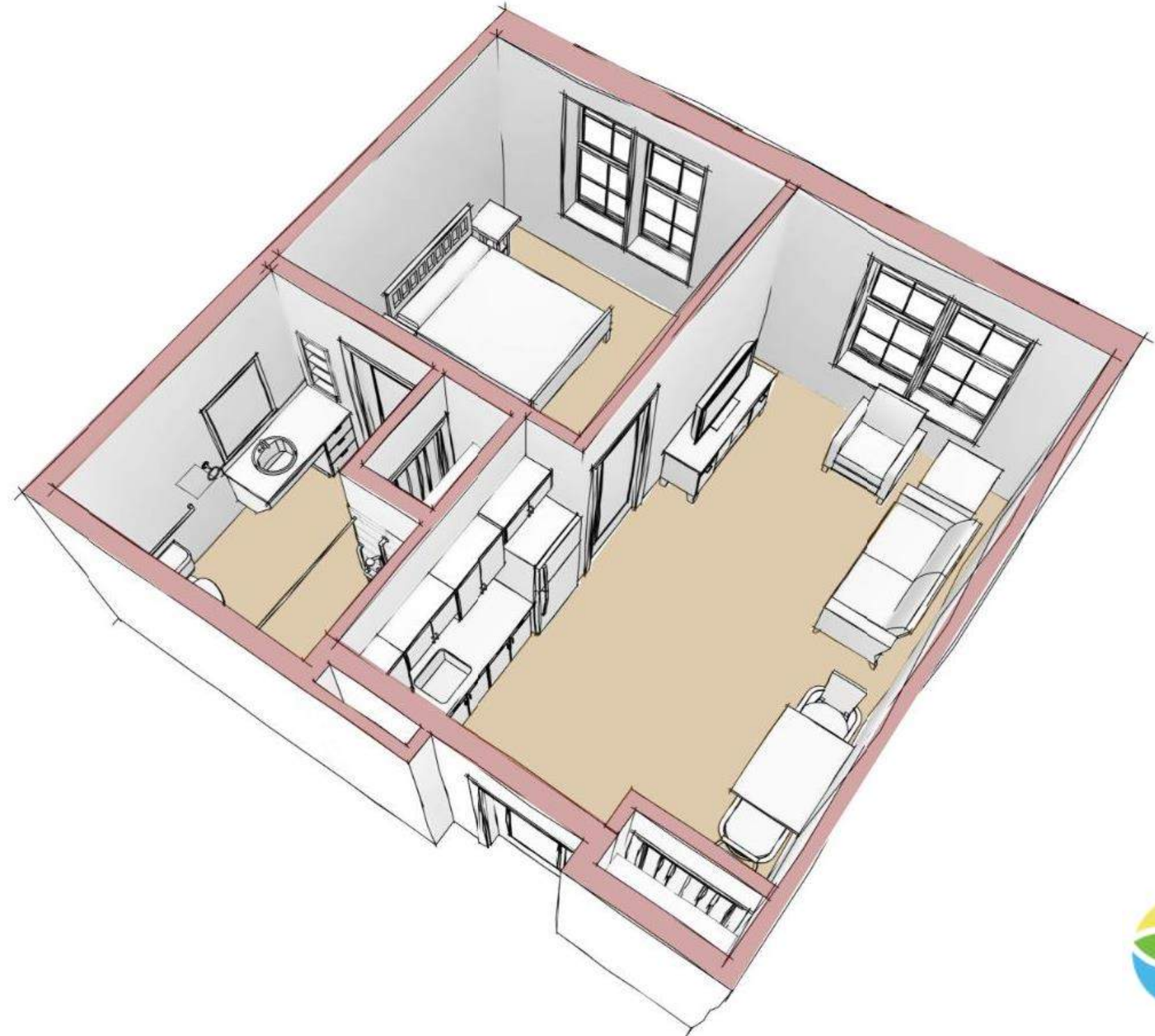
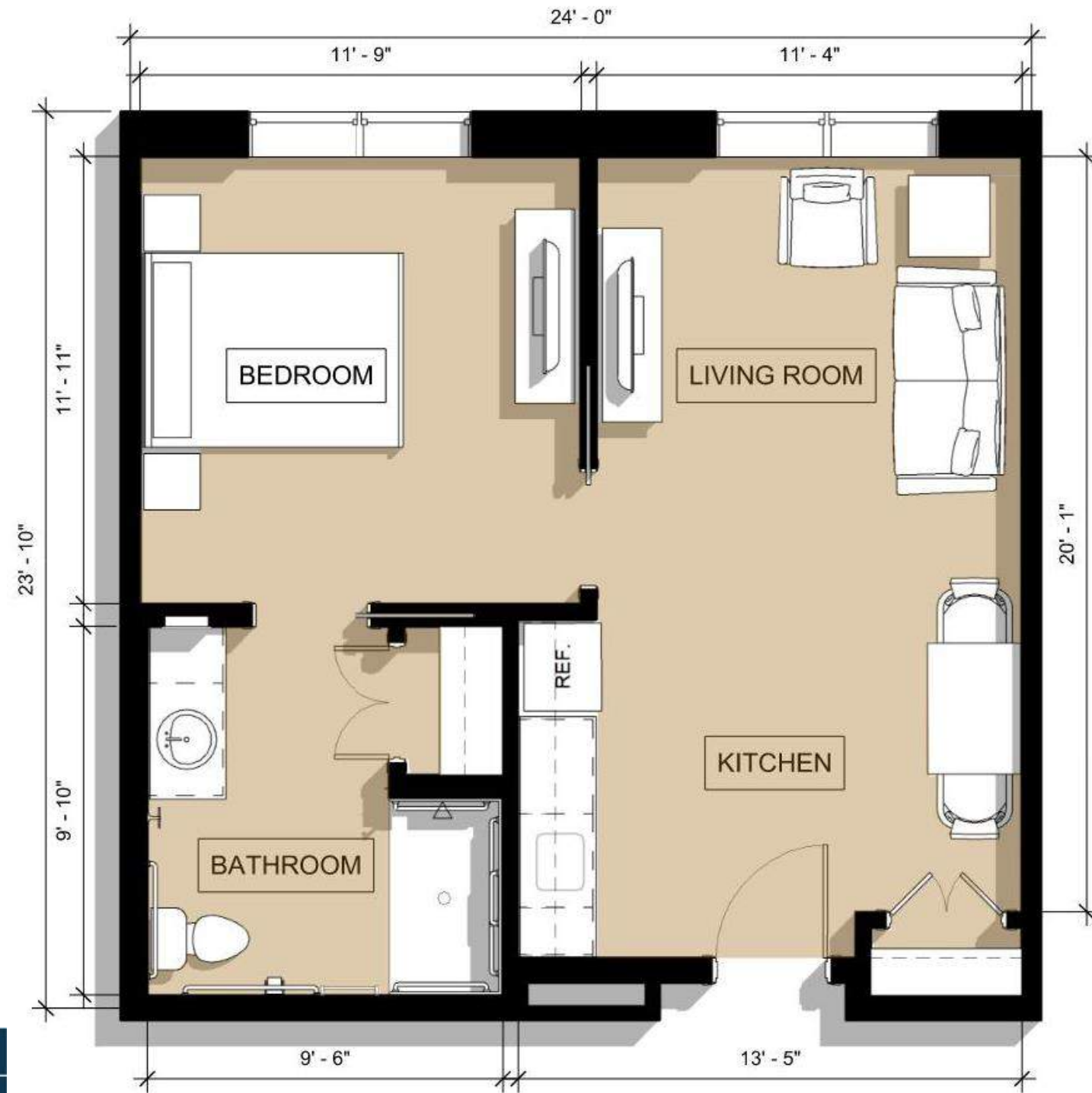
Level 2

Legend

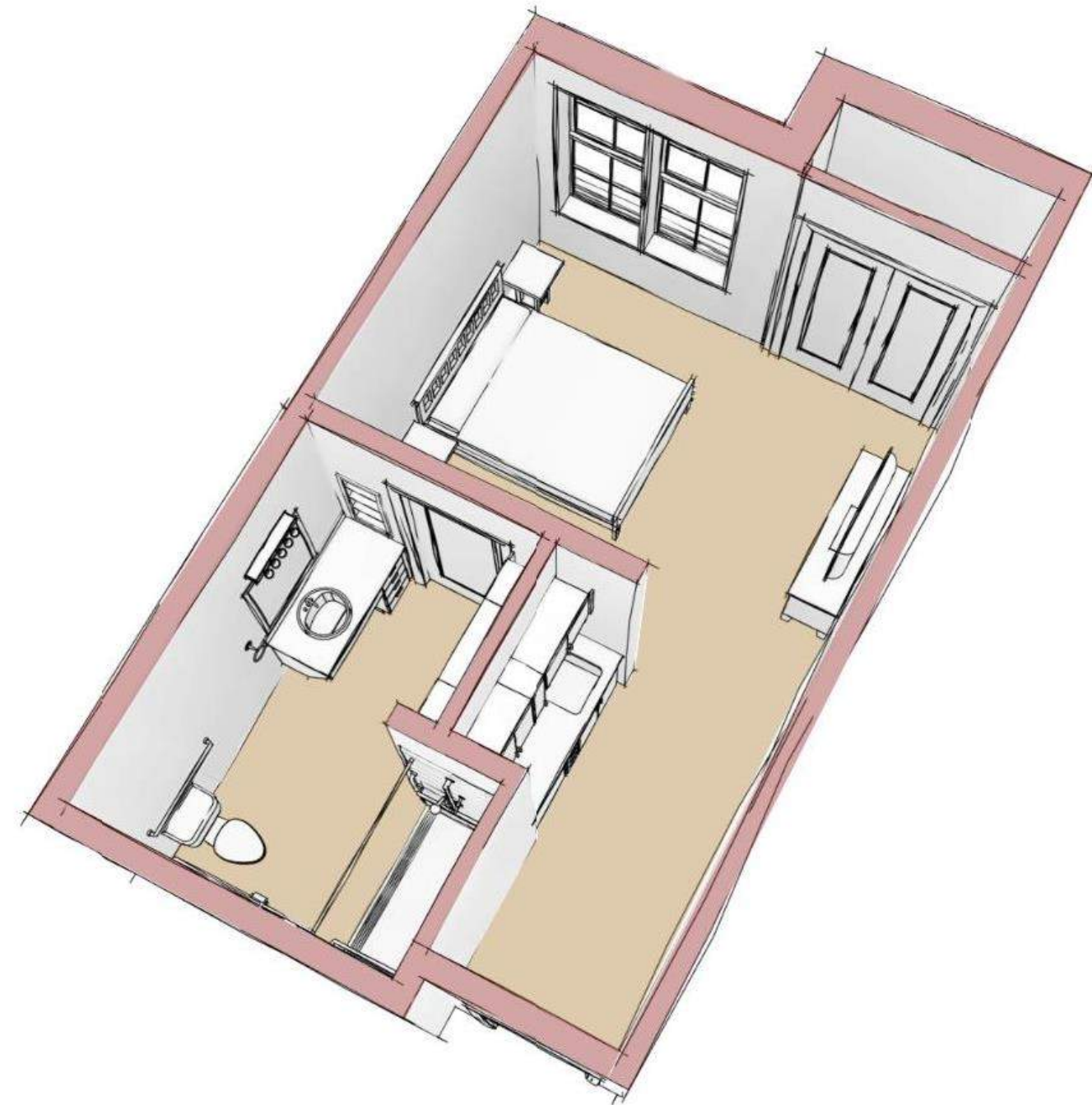
COLOR KEY
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BUILDING SUPPORT
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LOBBY
NURSING & SUPPORT
OTHER
PATIOS / PORTE COCHERES (COVERED)
RESIDENTIAL UNITS
RESIDENTIAL USE
WELLNESS



1-BEDROOM APT. – 550 SF



STUDIO – 382 SF



FUTURE VIEW FROM THE LAKE



BENCHMARKS

THE NEW MYTH



~~“Badges~~ **Benchmarks?**
We don’t need no stinking ~~Badges~~ **Benchmarks!**”



“Blazing Saddles”

Construction Costs

- Initial Construction Cost Benchmarks used for budgeting quickly lost relevance. Escalation and availability affected their reality.
- Under typical conditions, Benchmarks are a helpful guide for budgeting and programming. During this period, what was previously “normal” could no longer be expected.
- **Many Materials:**
No longer available at their original price.
No longer available at the expected schedule.
Some materials were no longer available . . . Period.

Construction Costs

Initial Building Construction Cost Benchmarks quickly lost relevance . . .

- 2019 (per industry recognized benchmarks) = \$225 /sf (used for initial budget)
- Original Agreement (11-09-20) = \$280 /sf (+24.4 % above 2019)
- Final Construction cost (01-30-23) = \$295 /sf (+31.1% above 2019)
- 2022 (per industry recognized benchmarks) = \$320/sf (+42.2 % above 2019)

. . . but relative to 2022 data, we apparently did better than expected.

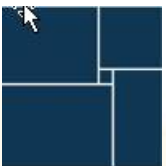
Construction Costs

- During the Schematic Design (SD) Phase, the estimate for the original program was higher than the budget. Many times, this happens to projects.
- The program was reduced by 5,000 SF.
- However, the estimate at the Design Development Phase increased.
- Value engineering / scope adjustments were applied to reduce costs. However, the final agreement total was still higher than the original budget.

All efforts only helped to mitigate cost increases, not eliminate them.

THE OTHER UNEXPECTED

SURPRISE, SURPRISE, SURPRISE!



Unforeseen Conditions

Surprise #1 = SOILS (+ \$420 k)

- Soils studies typically provide insight into below-grade conditions based on limited number of soil samples.
- Although the reports indicated some areas that needed improvements, they were not able to relay the true extent throughout the site. The majority of the expansion's footprint needed some form of remediation.
- The design and construction teams worked quickly to generate new details. To help mitigate the effects of the schedule, the order in which the building was to be constructed was reversed (south-to-north instead of the originally planned north-to-south).

Unforeseen Conditions



Unforeseen Conditions

Surprise #2 = AVAILABILITY & COST OF MATERIALS

- Specified materials became hard to obtain.
- Their prices had either increased, or their timing extended beyond what was tolerable for the project's schedule, or both.
- Some providers advised the team very late of their limitations.
- Multiple substitutions were quickly investigated. However, they only helped to minimize the increases in costs or the delays to the construction schedule -- they could not totally eliminate them.
- Part of the construction sequence had to be altered to fit the timing of some materials reaching the site.

Unforeseen Conditions

Surprise #3 = UTILITY COMPANY DELAYS

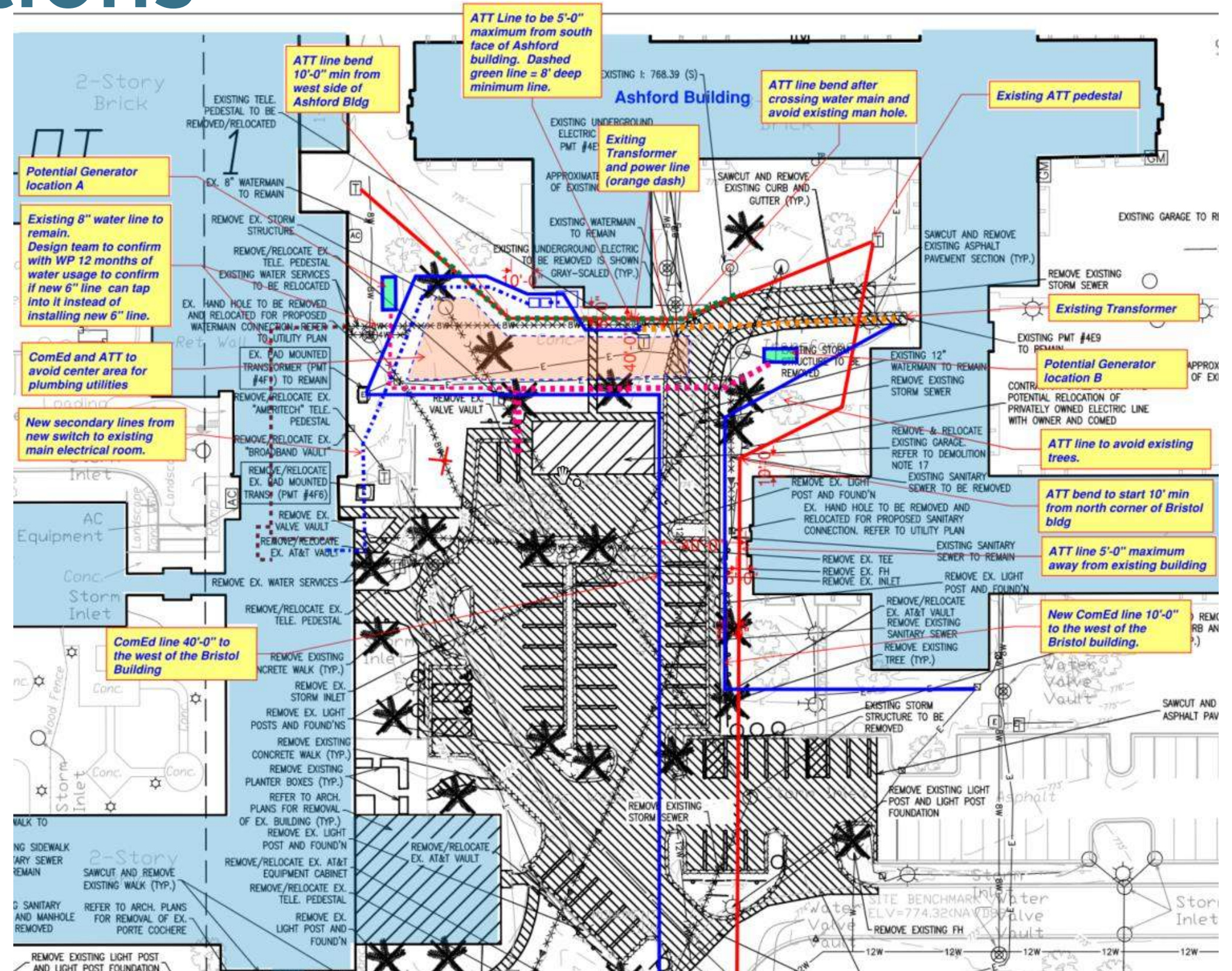
- Although there was extensive coordination with the Electrical & Telecommunications providers, they were short staffed.
- Relocation of existing below-grade lines were delayed (and then delayed again), affecting the construction schedule's critical path.
- Despite the team's best efforts to connect with the Utility providers, they were physically limited to help any quicker than they did.
- Nothing the team could do but wait.

Unforeseen Conditions

Utility Coordination Diagram

Significant phasing & early construction was needed to support the existing facility throughout the construction process.

The team needed to be proactive to minimize impact from UT delays.



Unforeseen Conditions

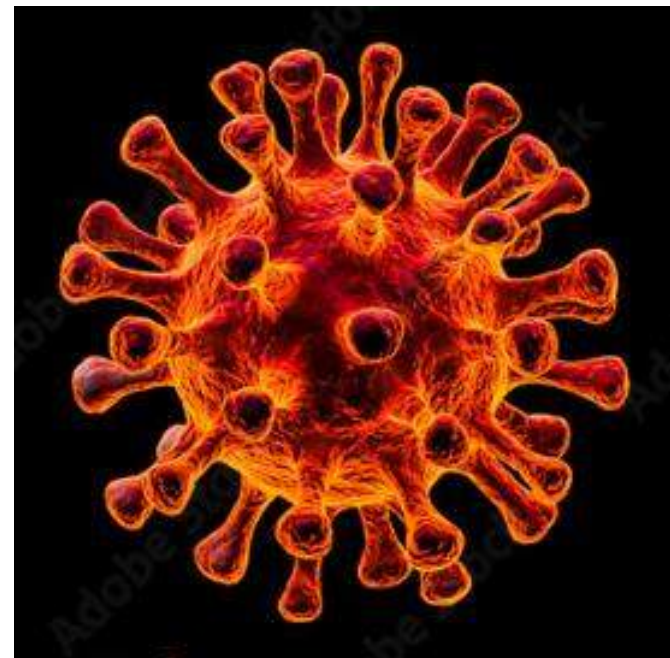
Surprise #4 = ORIGINAL SURVEYS MISSING INFORMATION

- Location of some existing below-grade utility lines were not accurate.
- The design-construction-owner team needed to quickly reassess options and work together to discover how to “thread” main utility lines through the existing building.
- Unexpected below-grade utilities were discovered and needed to be relocated and coordinated with new lines already being installed.
- Intensive on-site coordination sessions resulted in solutions that included changes in phasing, as well as coordinated facility shut-downs, **only possible through full team collaboration.**

Unforeseen Conditions

Oh . . . and then there was COVID . . .

(we are all very familiar with how
it affected everyone & everything).



Unforeseen Conditions

Surprise #5 = COVID

- COVID made the organization (like many others) question the validity of doing any expansion work at that time.
- The occupancy rates were significantly affected, and the future seemed quite uncertain.
- The project was re-evaluated and, after much consideration and soul searching, it resulted in **a confidence that the “Mission” would survive beyond COVID**. Therefore, the project was to proceed so the community could continue providing the needed service.

WHAT TO DO

LESSONS TO SHARE



VALUE ENGINEERING

- True Value Engineering is a process to find another method/ detail/ ingredient that will help accomplish a similar level of quality at a reduced cost.
- For this process to be truly effective, it needs to account for **ALL** the effects each proposed Option may have on the project **BEFORE** it is accepted.

BE AWARE OF THE \$HINY OBJECT!
It may cost you.



VALUE ENGINEERING

When attempting to balance a project, the typical options available or levers to pull involve: **Scope, Quality or Budget.**

Which ever combination of moves you make, your cost reduction target should a number less than your Target Budget (i.e. 90%) at any given phase.

Be aggressive early in your proposed reductions so you can have space in which to “grow-up” to your Target Budget as the project progresses. You can always add scope in later.

SUBSTITUTION REQUESTS

Substitution Requests have become more prevalent than ever.

They typically propose targeted savings in cost and/or time for specific components. **They must be evaluated holistically.**

If a Substitution is approved in isolation, it has the potential of:

- Increasing the costs of other associated components.
- Requiring changes to the contract documents (details and specs).
- Reducing the quality of the overall installation and warranties.

EXTEND THE DEFINITION OF TEAM

- Reach out to your Authorities, Reviewers and Agencies. Engage with them and seek their input throughout the process.
- Connect with them early and often. They are not only a resource for accomplishing your goals, but they can also be your best allies.
- By sincerely engaging the staff at the IDPH and the Village of Carol Stream, our relationship was one of collaboration that benefited the project and the community.

They also want what's best for your project.



EXTEND THE DEFINITION OF TEAM

- **THE LOCALS:** Genuinely seek the input of your community staff. They know what is needed (in detail). They work at it every day, and they are the ones who will need to continue to “make it work.”
- **CAUTION:** Make sure the timing of their input is coordinated with the overall project design schedule. Untimely input will affect the project’s flow and may limit the extent to which their contributions may be incorporated into the design.
- **REMEMBER:** Although the overall corporate purposes for a project may include ideas that don’t align with the local staff’s interest, including them as part of the Team will definitely get you closer to Success.

PROACTIVE CONTRACTOR

- Require that your contractor be proactive about identifying as quickly as possible the materials, equipment or disciplines that have availability issues.
- The submittals for these components should be at the top of their Submittal Schedule so they can be ordered as immediately as possible.
- If you have a contractor that is part of the development/budgeting team, the identification of challenging components needs to be a key part of their contribution to the process.

AND ALL WAS WELL

JUST FOLLOW THE RIGHT PATH





EAST ELEVATION



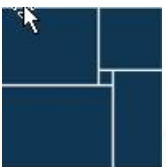
COURTYARD



NORTH ELEVATION

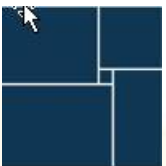


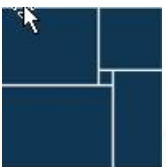


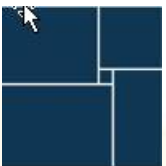


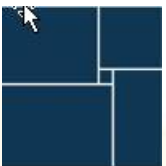












MAIN DINING



WHAT ELSE WAS LEARNED

THE FINAL NUGGETS



The Final Nuggets

- Expand your sense of team. Look for collaborators, but actively manage the process.
- Promote the concept of nimble partnership. All members need to focus on how to get to the best possible solution.
- Better outcomes are possible when plans are challenged . . .
as long as the team has the disposition to serve.





LeadingAge[®]
Illinois

MOMENTUM

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MARCH 7-8, 2023

Renaissance Schaumburg
Convention Center - Schaumburg, IL

Thanks for Attending

Questions?