

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

**METROPOLITAN GARDENS
HOPE VI REVITALIZATION**

**PROGRESS REPORT
March 2004**

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RESIDENT RELOCATION AND RETURNS

March 2004:

The resident population of Metro Block A is 41 households.

Two households from Block A have elected to relocate to other Public Housing Communities.

Of the total Block A population, twenty-nine households have been approved and are eligible to return to the new community. Ten households have yet to become eligible to return and are in process of correcting personal situations and the two additional households have not yet been interviewed. HABD will commence Relocation Processing work with Households electing not to return to the new community. At least eighty-five residents have expressed an interest in returning to the new community.

COMMUNITY and SUPPORTIVE SERVICES - CSS

March 2004:

The CSS Project is ongoing with resident case management services; maintaining contact with off-site residents; continuing to enroll residents in various programs; coordinating with community service providers, placing residents in continuing education programs, finding employment opportunities for residents and tracking Metro Gardens Resident statistics.

To date, two hundred seventy one families are enrolled in services, with two hundred twelve of these families actively participating. Thru this endeavor, sixty-three residents are currently employed with an additional two persons enrolled in an eight week job training program.

A Job Readiness Training (JTR) class is scheduled for the week of April 19th, with the focus being Life Management or Life Skills Sessions.

The United Way Team, Dunn Construction and the infrastructure Sub-Contractors are continuing to coordinate with regard to employment opportunities for Metro Residents on the Infrastructure Project. During the month of March, Metro Resident hires with Dunn Construction and SEI remain in employed status.

HOME OWNERSHIP PROGRAM

March 2004:

HABD has issued a Request for Qualifications, in an effort to identify and secure a real estate entity to assist in the process of identifying potential properties for Homeownership sites, acquisitions. In Mason City, appraisals have been completed and reviewed by HABD Legal and offers are currently being presented to those property owners.

HABD is continuing negotiations with City of Birmingham concerning sites in Fountain Heights and other Birmingham neighbourhoods. City of Birmingham has completed transfer

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of ten Fountain Heights properties to HABD and option on five additional properties is under discussion. The Housing Authority has secured City commitment for a total of twenty-five Fountain Heights properties relative to the Tuxedo Courts HOPE VI Grant Application.

The Southampton Program has completed contract award and construction start for four additional homes. The contract is anticipated to be executed to allow an early April, construction start.

A new Home Ownership training program is in progress. Total program to date includes thirteen families including two from Metro. Another class is scheduled to start in April.

PROJECT PROGRESS OVERVIEW

1. Project Implementation

A. Phase 2 PreDevelopment Loan Agreement

March 2004:

The coordination of the revisions to this document between the PMT and Developer have been completed and submitted to HABD for Board approval and execution and subsequently submitted to HUD Headquarters for approval thereupon allowing for release of HOPE VI funds to address Developer Third Party Costs and Developer Overhead Costs associated with implementation of the Phase 2 PreDevelopment Phase.

B. Phase 2 Closing

March 2004:

The Phase 2 Closing for HUD has been tentatively scheduled for July 01, 2004.

In advance of Closing, the Phase 2 Mixed Finance Proposal has been submitted to HUD Headquarter as of March 01, 2004. HUD has issued comments and requested clarifications which are being addressed. Phase 2 Evidentiaries are scheduled for submission to HUD by June 01.

C. Phase 2 Design Development and Construction Documents

March 2004:

Preparation of Phase 2 Construction Documents is in full progress, with submission to FHA and the Permit Department for the permit review process anticipated occurring in mid-April.

D. Demolition Project

March 2004:

Phase 1 Demolition and Phase 2A Demolition, Blocks B, C, D, E, F work is complete

Project Close-Out status is as follows:

HABD has completed full payment to the Developer and Contractor for Release of Retainage to the Contractor.

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E. Infrastructure-Street Improvements Project-Sanitary Sewer Project:

March 2004:

The Infrastructure project continues to move ahead. Progress during the month of March has been delayed another 5 days due to weather and site conditions. In spite of this problem the Contractor expects to complete the project by April 30. As reported by the March Payment Application, the overall Infrastructure project is approximately 67% complete including the Sanitary Project which is 90% complete.

Alagasco is continuing to work on system revisions and shut-downs. Completion of this work is required as soon as possible in order to complete new storm sewer connections at 22nd Street.

F. Project Progress March:

- I. Successful pressure testing of the Sanitary Lines.
- II. Installation of sanitary lines in Marconi Park.
- III. Fine grading in the Block 'F', mid-block.
- IV. Installation of four riser poles by APCO.
- V. Installation of conduit in 23rd Street to riser pole near 6th Avenue.
- VI. Installation of conduit in front of Powell School.
- VII. Complete light pole bases in Block 'D' & 'F'.
- VIII. Water line services work on Carraway Blvd. and the intersections of 7th Avenue and 25th Streets.
- IX. Procured permit to install sprinkler lines.
- X. Installation of inlet structures and sidewalks in Blocks 'D', 'E' & 'F'.
- XI. Installation of trees in Blocks 'D' & 'F'.

G. Infrastructure Payment Applications:

March 2004:

MGD Payment Application 16 (Thru March 20th, work period) – HABD portion of payment has been completed to MGD.

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H. Infrastructure-Street Improvements Project-Sanitary Sewer Project

Problem situations February 2004:

- 1) Block F – 24th Street Revision/existing tree preservation change
City Engineering has requested some additional changes to traffic signage. Schoel Engineering is revising the drawing change prior to start of work. As of February 27, Schoel Engineering has not issued the revised drawings to Dunn.
- 2) Coordination with Phase 1 Building Construction – installation of the security fence for Building
- 3) Electrical services for traffic signals and street lighting – The electrical engineer, Rigel Engineering has issued the RFP for revisions to the design.
- 4) Bellsouth services and coordination – Bellsouth has not started installation of new services below 6th Avenue. The Infrastructure Contractor is concerned about timing for completion of this work in order to avoid additional excavation and patching subsequent to installation of new road surface. As of month end Bellsouth indicate their design work is complete and they will coordinate with Schoel Engineering for final on-site locations.
- 5) Gas line conflict with new storm sewer at 6th Avenue and 22nd Street – Alagasco is in process of shutting down the unused sections of the gas system in the area of Metro Gardens. This work is must be complete before Dunn can proceed with completion of storm sewer at 6th Avenue and 22nd Street.
- 6) Coal storage bunker – located on Block C in conjunction with the old steam plant and stack, the major portion of the old coal storage bin was demolished during the Demolition Project. However, a portion of the coal bunker extended into the Right-Of-Way. The coal bunker extension into the Right-Of-Way was unknown at the time that contract documents were prepared. During the course of the Demolition Project it was decided to leave in place that portion of the coal bunker extending into the Right-Of-Way in order to avoid the necessity for extensive shoring to maintain the street and existing sidewalk.

As a result of Infrastructure construction it was determined that the remaining portion of the coal bunker conflicted with installation of new sanitary laterals and water lines from 24th Street into Block C. The remaining portion of the coal bunker has to be removed. Schoel Engineering has issued an RFP for the additional work which has been completed by the Contractor in order to allow completion of new sanitary laterals and water lines in 24th Street.

- 7) Electrical services to traffic lights at Caraway Boulevard – during the course of installing new irrigation piping and trees along Caraway Boulevard, the Contractor has encountered control cabling for traffic lighting along Caraway Boulevard. The cable is at a very shallow depth but its location conflicts with installation of new trees and underground services which cannot be moved to alternate locations. Schoel

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(h) Infrastructure-Street Improvements Project-Sanitary Sewer Project – continued

engineer has proposed relocating the existing cabling in order to resolve the conflict and an RFP has been issued to the Contractor.

Requests For Proposal in process to date:

(1) Additional conduit required for installation of cable television and telephone services at all Blocks.

Utility service providers were unable to provide piping requirements during design phase. Value of extra \$9,075.00

(2) Birmingham Water Works Deposit for Water Loops. Reported in September and paid; \$21, 735.00 extra.

(3) Increase scope of new street surfacing to include full width of 22nd Street, 5th Avenue, 7th Avenue, 6th avenue; \$67,000.00 extra. This item is under discussion by project teams and can only be implemented if sufficient funds are available.

(4) Conflict Box at 23rd Street/6th Avenue for sanitary and storm connection; \$247,632.00 extra.

(5) Relocation of storm sewer and APCO ductbank on 24th Street between 6th and 5th Avenues to preserve existing trees. Credit to contract \$59,757.00.

(6) Additional fire hydrants as requested by Fire Marshal; \$21,070.00 extra.

(7) Block F demolition of existing telephone ductbank – deleted.

(8) replace/revise storm sewer piping and connections at various locations to avoid underground conflicts with existing traffic light and poles; \$7,791.00 extra.

(9) replace/revise storm sewer piping and connection at 6th and 24th Street and 5th and 24th Street; \$9,860.00 extra. These revisions were due to an underground conflict with traffic light poles at 6th and 24th and at request of City at 5th and 24th.

(10) Extend storm sewer north on 22nd Street as directed by City; \$179,420.00 extra. This item has not been approved and is expected to be shifted to the Infrastructure Project which will implement in conjunction with Block A development.

(11) Additional revisions to new storm sewer line at 6th Avenue and 23rd Street to complete connections. Revisions required due to new Conflict Box installation; \$4,265.00 extra.

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(h) Infrastructure-Street Improvements Project-Sanitary Sewer Project – continued

(12) Water sampling and testing for Block A water services. \$1,087.00 extra.
Cost to be backcharged to demolition Contractor.

(13) Overcharge on Contractor O&H costs; credit to contract \$3,019.31

(14) Delete Block A from Phase 1 Infrastructure Project defers to later date;
credit to contract \$265,036.50. work cannot be implemented due to residents
still in occupancy at project site. Electrical materials and brick pavers for Block
A have been ordered and delivered to jobsite.

(15) Additional manholes and storm sewer on Block D and E green streets;
\$83,735.00 extra.

(16) Conflict on 23rd street at green street, storm sewer and telephone duct;
\$1,164.00 extra

(17) Credit to contract for Contractor overcharge on Contractor O&H costs
relative to Change Order 3; \$15,096.85 credit.

(18) Install new sanitary service line at Marconi Park facility; \$12,330.00 extra

(19) Repair existing brick storm sewer at 6th Avenue; \$2,100.00 extra

(20) Change storm sewer piping to arched pipe for storm sewer to clear
existing services; \$3,870.00

(21) Revise elevations of storm sewer at 7th avenue in order to clear water line;
2,877.00 extra

(22) Revise new domestic water services as directed by BWWB; \$14,346.00
extra.

(23) Water line revision due to conflict with storm sewer; #14,508.20 extra.

(24) Time extension request for weather delay

(25) & (26) irrigation of installed landscaping in the Right-Of-Way prior to water
services connection to the Blocks. Decision on methodology pending –
watering manually or by redesign of new water supply service to Blocks.
Waiting for final contractor pricing.

(27) Removal of coal bunker; \$10,740.00 extra to contract

(28) defer installation of some sidewalks in order to avoid conflict for Phase 1
Building Construction; \$30,897.00 credit to Contract. Schoel Engineering is
evaluating pricing.

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(h) Infrastructure-Street Improvements Project-Sanitary Sewer Project – continued

Change Orders issued to date

To date, 5 Change Orders have been issued and Change Order 6 is in process for a net change of \$115,985.92 extra to Contract.

Infrastructure Project - Minority Participation and Section 3 Resident Employment

A Section 3 Plan which encompasses the Infrastructure Project has been submitted to HADB and HUD by MGD.

Metro Residents recently hired by Dunn and Southeastern Environmental, the plumbing subcontractor, remain on the job.

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I. Phase 1 Site Remediation Project Blocks B south, C, F west

March 2004

Funds for the Site Preparation Project are included within the HABD Capital Funds commitment for Demolition - Site Preparation pursuant to the Master Developer Agreement, Exhibit D. The project contract is a GMP construction contract in the amount of \$680,000.00 for construction plus MGD construction management fees.

The Site Remediation/Preparation Project has slowed during the month of February. Earthwork aspects of the project are nearing completion. Schoel Engineering is in process of revising final elevations at Block F and the Contractor is waiting to receive this information in order to complete earthwork Site Prep at Block F.

The plumbing subcontractor can not complete sanitary connections to the new mains until the new system in the Right-Of-Way has been inspected and approved by Jefferson County. This final approval will not be granted until the total system is complete and tested. This activity is currently scheduled for April.

J. Phase 2 Project Low Income Housing Tax Credit Application

March 2004

MGD has completed required submissions to AHFA as of February 16. AHFA has approved an extension to allow MGD time to complete HUD and FHA Closing processes.

K. Phase 1 New Construction

March 2004

Contractor, Integral/Doster Metro Gardens Joint Venture, has been proceeding with construction work on all Block B buildings. To date the Contractor has started installation of site security fence, foundation excavation, foundation installation, water services installation, below slab piping services.

Weather events have caused some project delays and coordination situations with the Infrastructure Project have compounded the problem. To date the Construction Project is approximately 4 weeks behind schedule. The Contractor and subcontractor are working weekends in order to make up for lost time.

During process of foundation excavation, the Contractor has encountered some sub-surface, pre-Metro foundations which had not been discovered during the Demolition Project. Removal of these structures has caused delay in progress with foundation construction.

HUD inspector has been on-site twice each month. Payment Requests #3 was submitted by the Contractor and reviewed and approved by the HUD Inspector, Developer, Architect, and PMT.

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L. Approvals Status

March 2004

- ❖ AHFA, Phase 2 Tax Credit Application:
MGD has completed AHFA submissions for October 27, November 17, December 16, January 15, February 16.
- ❖ City of Birmingham:
Subdivision approval complete February 11. Planning Commission presentation scheduled for April 07.
- ❖ FHA
Phase 2 Preliminary Application submitted February 19.
- ❖ HUD
Budget Revision to reflect Phase 1 Closing has been submitted to HUD Headquarters
- ❖ Overall Project Budget Revision to track Project Development Phases 2 and 3 in addition to the Off-Site Project has been prepared. The PMT are awaiting HUD approval for the Phase 1 Budget Revision prior to submitting the Overall Project Budget Revision.

2. MGD Work in Progress

March 2004:

MGD is currently focused on the following activities:

- Preparation of Phase 2 Evidentiary Documents
- Final Phase 2 submission to FHA
- Phase 2 submissions to AHFA for LIHTC
- Completion of Phase 1 Infrastructure-Street Improvements-Sanitary Sewer Projects.
- Completion of Phase 1 Site Preparation-Soil Remediation Project.
- Phase 1 Building Construction Project
- Completion of Phase 2 construction drawings.
- Completion of Phase 2 City approvals
- Phase 2 Infrastructure Project

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3. Off-Site Developer - Request for Proposals (RFP)

March 2004

No change in status. The RFP document is complete and ready for approval by HABD and the HABD Board of Commissioners. The PMT have recommended issuing the RFP subsequent to Phase 1 Closing.

In advance of the Off-Site Project, the PMT are preparing a required overall HOPE VI Budget Revision for HUD approval which will clarify the budget scope for the Off-Site Project.

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4. Project Related Meetings – March 2004

- ❖ March 1 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
Phase 1 Building Construction Jobsite Meeting: Contractors / HABD / Design Team
- ❖ March 2 Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ March 3 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
- ❖ March 8 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ March 9 Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ March 10 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT
- ❖ March 15 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
Phase 1 Building Construction Jobsite Meeting: Contractors / HABD / Design Team
- ❖ March 16 Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ March 17 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
- ❖ March 19 Integral / Doster Sponsored Partnering Meeting
- ❖ March 22 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ March 23 Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ March 24 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT
- ❖ March 29 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ March 30 Phase 1 Housing Pay Application Review Meeting: HUD / HABD / Design Team / MGD / PMT
Phase 1 Site Remediation Pay Application Review Meeting: HABD / MGD / Schoel / PMT
Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
Project Concerns Clarification Meeting: HABD / MGD / PMT
- ❖ March 24 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
Residents Project Status Meeting: Metro Residents / HABD / MGD / PMT

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5. Document Submissions and Notices – March 2004

- ❖ February Progress Report submitted to HABD by PMT.
- ❖ Submission to AHFA by MGD relative to Phase 2 Tax Credit Award
- ❖ Payment Application for Program Management fees submitted to HABD by PMT.
- ❖ Section 3 Report submitted to HABD by PMT-MGD-Dunn Construction
- ❖ Phase 1 Site Remediation Payment Application #3 submitted to HABD by MGD and PMT
- ❖ Phase 1 Building Construction Payment Application #3 submitted to HUD and Disbursing Agent
- ❖ Phase 2 Development Mixed Finance Proposal submitted to HUD Headquarters March 01.

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Project Financial Status

March 2004:

The PMT, Project Accountant, Dennis Mobley, continues to monitor the overall project financial status through HABD Finance Department. To date expenditures are in compliance with Approved Predevelopment Budget expectations for Relocation, HABD Administration, Program Management fees and MGD costs including: Demolition, Infrastructure, MGD project management, Pre-Development Loan Agreement pertaining to Third Party Costs and Advance against Developer Fees.

Total payment for the Demolition Project to date has been completed by HABD.

Infrastructure payment Application #15 has been reviewed and approved by the PMT and submitted to HABD for review and approval.

Phase 1 Building Construction Payment Request #3 has been reviewed and approved by HUD Inspector, MGD and PMT. Copy has been submitted to HABD. Payment Request has been submitted to HUD Headquarters and Disbursing Agent.

Financial Reports are included in the Appendix.

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Phase 1 PRE-DEVELOPMENT LOAN

Third Party Costs and Advance Against Developer Fees

Phase 1 Pre-Development Loan has been closed out subsequent to Phase 1 Closing

Phase 2 PRE-DEVELOPMENT LOAN

Third Party Costs and Advance Against Developer Fees

To be implemented pending signatures and approvals

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Project Schedule

- ❖ Relocation
Block A population is 41 households.
- ❖ Phase 2 LIHTC Application
Application due May 21st, MGD & HABD representatives to attend seminar in Montgomery in early April. Credit towards application awarded for participation.
- ❖ Demolition Phase 1 and Phase 2 Block B
Final payment made by HABD.
- ❖ Phase 1 Infrastructure Project
Construction proceeding. Anticipated completion April 30, 2004
- ❖ Phase 2 Construction Documents
In process and on schedule.
- ❖ Phase 2 Closing
Scheduled for July 01, 2004
- ❖ Phase 1 Soil Remediation Project
Work is progressing; sanitary lines were successfully pressure tested Lateral connections to commence inside property lines.
- ❖ Phase 1 Building Construction
In progress. Slabs of first three buildings to be poured in early April.
- ❖ Phase 2 Development
For approval presentations to Planning Commission and DRC scheduled for early and mid April.
- ❖ Phase 2 PreDevelopment Loan Agreement
Document prepared, to be presented for HABD Board approval / execution.
- ❖ Phase 2 Mixed Finance Proposal and Evidentiaries
Mixed Finance Proposal submitted to HUD, with comments received and responses being prepared.

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SECTION 2 OUTSTANDING ISSUES

Key Project Issues

- ❖ Phase 1 Infrastructure Project – progress, contract administration, completion
- ❖ Phase 2 Infrastructure Project – completion of Construction Documents, Construction Bid-Out.
- ❖ Phase 2 Infrastructure Project – additional funding from city / county.
- ❖ Phase 1 Site Remediation Project – progress and completion
- ❖ Phase 1 Building Construction – progress and contract administration
- ❖ Implementation of the CSS Program
- ❖ Home Ownership Program
- ❖ Phase 2 Construction Documents
- ❖ Phase 2 PreDevelopment Loan Agreement
- ❖ Phase 2 Mixed Finance Proposal and Evidentiaries
- ❖ City Approvals for Phase 2 Development.
- ❖ Phase 2 Closing

PMT Project Look Ahead

- ❖ Continued implementation of the Phase 1 Infrastructure/Street Improvements/ Sanitary Sewer Project.
- ❖ Implementation of Phase 1 Site Remediation Project.
- ❖ Phase 1 Building Construction
- ❖ City Approvals for Phase 2; Planning Commission, Design Review Commission.
- ❖ Phase 2 Building Construction Drawings - completion
- ❖ Phase 2 Building Construction Drawings – submittals to FHA and Building Department for Permit Review.
- ❖ Phase 2 Infrastructure
- ❖ Phase 2 Mixed Finance Proposal and Evidentiaries
- ❖ CSS Case Management implementation.
- ❖ HABD Screening Process for Returning Residents.
- ❖ Issue Off-Site Developer RFP
- ❖ Community and Resident Progress Review meetings
- ❖ Track schedule
- ❖ Track Project Budget
- ❖ Monitor Relocation, CSS, Home Ownership

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SECTION 3 APPENDIX

- ❖ INFRASTRUCTURE PAYMENT SUMMARY No. 16.
- ❖ SITE PREPARATION PAYMENT SUMMARY NO. 3.
- ❖ SITE UPDATE PHOTOS.
- ❖ PROJECT KEY ACTIVITIES SCHEDULE updated to March 31, 2004.
- ❖ INFRASTRUCTURE SCHEDULE updated to March 31, 2004.
- ❖ PHASE 1 CONSTRUCTION SCHEDULE updated to March 31, 2004.
- ❖ PHASE 2 PROJECT IMPLEMENTATION SCHEDULE updated to March 31, 2004.
- ❖ 60-DAY WORK IN PROGRESS SCHEDULE for March and April 2004.