

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

PARK PLACE

PROGRESS REPORT July - 2004

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SECTION 1 STATUS REPORTS

RESIDENT RELOCATION AND RETURNS

July 2004

The resident population of Metro Block A is thirty-four households.

Of the total Block A population, twenty-seven households have been approved and are eligible to return to the new community. Seven households have yet to become eligible to return and are in process of correcting personal situations and seventeen residents have yet to resubmit their information packages. HABD has relocated all households not electing to return to the new community with the exception of one, and that household is scheduled to be relocated in August. HABD is no longer pre-screening residents and IMS has received the necessary documentation to continue these processing.

At least eighty-seven residents have expressed an interest in returning to the new community.

COMMUNITY and SUPPORTIVE SERVICES - CSS

July 2004:

The United Way is continuing to provide 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.

Two hundred seventy two families are enrolled for services, with two hundred thirteen of these families actively participating. Four hundred seventy three persons are receiving services. Thru this endeavor, sixty-five residents are currently employed.

In lieu of offering Job Readiness Training (JTR) classes, United Way is referring residents to other service operators in the area offering similar opportunities.

The United Way Team, Dunn Construction, Integral-Doster and the project Sub-Contractors are continuing to coordinate regarding employment opportunities for Metro Residents on the Project.

HOME OWNERSHIP PROGRAM

July 2004:

HABD has issued a Request for Qualifications, in an effort to identify and secure a real estate entity (or entities) to assist in the process of identifying potential properties for Homeownership sites/acquisitions. Three responder's initially submitted proposals. Through subsequent negotiations the proposals were deemed non-responsive and HABD plans to re-issue this RFQ.

In Mason City, appraisals have been completed and reviewed by HABD Legal and twenty-three offer letters have been issued. Three positive sell responses have been received from that initial distribution. Additional attempts are planned to contact and secure a response for m the residents in this area.

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The Southampton Program has completed contract award and construction start for four additional homes. The contract had been initially prepared and submitted to the contractor for execution, additional revisions were incorporated and services are expected to commence in mid August.

The Home Ownership training program is continuing. The total program to date includes thirteen families including two from Metro. The next class is being planned to include residents of Mason City and Fountain Heights.

PROJECT PROGRESS OVERVIEW

July 2004:

1. Project Implementation

A. Phase 2 Closing

The documents associated with the HUD portion of the Phase 2 Closing, have been completed and executed. The financial portion of the Closing has been delayed because FHA needed additional time to review the documents. This portion of the Closing is scheduled to be completed by August 25th.

B. Phase 2 Design Development and Construction Documents

The Phase 2 Construction Documents are 95% complete and were submitted to FHA and the Building Department for the permit review process on June 6th. The Building Department has yet to issue Building Permit until resolution of a Sewer Impact Fees misunderstanding.

C. Demolition Project

Phase 1 Demolition and Phase 2A Demolition, Blocks B, C, D, E, F work is complete and Close-out and final payments have been processed.

The Block 'A' demolition will commence upon completion of relocation of the current residents into the new development housing.

D. Project Construction Progress

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

The Infrastructure project continues to move ahead. Due to approvals and delivery issues related to the truncated pavers, the Contractor expects to complete the project by August 22nd. The overall Infrastructure project is approximately 95% complete including the Sanitary Project which is 100% complete.

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- a. **Payment Applications:**
None submitted in July.
 - b. **Requests For Proposal:**
None Outstanding
 - c. **Change Orders** issued to date:
To date, Nine Change Orders have been issued.
The original contract amount was \$ 5,453,715.00
Net change by Change Orders \$ 359,998.96
Current Contract Value \$ 5,813,713.96
 - d. **Minority Participation and Section 3 Resident Employment**
A Section 3 Plan which encompasses the Infrastructure Project has been submitted to HABD and HUD by MGD.
 - e. **Construction Progress**
 - i. Repaved and restriped City streets
 - ii. APCO Installation of power equipment to support the Block 'B' buildings
 - iii. Preparation of corner ramp areas to receive 'truncated pavers'.
 - iv. Successful domestic water line testing in Blocks 'D' & 'E'.
 - v. Approval of Sanitary Sewer system by Jefferson County.
 - vi. Connection of irrigation system in Block 'F' to water service.
- II. Phase 1 - New Rental Units Construction;**
- a. **Payment Applications:** The HUD inspector reviewed the project this month and Payment Request #6 was submitted by the Contractor and reviewed and approved by the HUD Inspector, Developer, Architect, and PMT.
 - ❖ MGD Housing Invoice #6 was submitted in July.
 - b. **Construction Progress**
 - Installed Underground Electrical & Plumbing Rough-Ins/Flowable Fill;
Bldgs. 1, 2, 3
 - Poured Slabs on Grade, MEP underground rough-ins;
Bldgs. 1, 9, 10, 11, 18
 - Installed Wall, Floor & Roof Trusses & Roofing;
Bldgs. 6, 8, 9, 10, 11, 12, 13, 16
 - Installed Masonry, Elect. & Plumbing Rough-ins
Bldgs. 16, 17
 - Installed HVAC, Doors, Windows & Masonry
Bldgs; 13, 16, 17
 - HVAC, Fire Protection, Cable TV, Security & Phone lines in wall rough-in @
100%, Sanitary tie-in 100%, Drywall material in building
Bldgs. 14, 15

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SECTION 1 STATUS REPORTS

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

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 total construction value earned to date is \$ 454,492.08 or 67% of the contract value.

a. Payment Applications:

None submitted in July.

b. Requests For Proposal in process to date:

None submitted in July.

E. Phase 2 Project Low Income Housing Tax Credit Application

MGD had 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.

F. Approvals Status

I. City of Birmingham:

DRC conditional approval per presentation July 14th. Building Permit could be obtained.

Supplemental clarification presentation needs to be scheduled prior to issuance of Certificate of Occupancy.

II. Jefferson County Approved Sanitary Sewer System on July 16th.

2. MGD Work in Progress

A. MGD is currently focused on the following activities:

I. Completion of Phase 1 Infrastructure-Street Improvements-Sanitary Sewer Projects.

II. Completion of Phase 1 Site Preparation-Soil Remediation Project.

III. Phase 1 Building Construction Project

IV. Completion of Phase 2 City approvals

V. Phase 2 Infrastructure Project planning/implementation.

VI. Management Plan for submission and approval.

VII. Block 'A' Development and coordination with Jefferson County

VIII. Property Management services, including marketing and coordination/interaction with residents.

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

The RFP document was submitted to the HABD Board for review and approval prior to advertisement and subsequent planned distribution in August. Proposals are scheduled to be received September 30th.

4. Project Related Meetings

- July 6 Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- July 7 Property Management Conference Call Meeting: MGD / IMS / PMT / HABD
Community Task Force Meeting: Metro Community Partners / HABD / PMT
- July 8 MI / MR Clarification Meeting With State Officials: HABD / MGD / PMT
- July 12 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- July 14 Park Place – Monthly Executive Level Status Meeting
- July 19 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
HABD Board of Commissioners Meeting
Infrastructure Expenditures Clarification Meeting: MGD / PMT
- July 20 Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- July 21 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS /
Schuel
Property Management Conference Call Meeting: MGD / IMS / PMT / HABD
Owner / Architect / Contractor Meeting
- July 22 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- July 26 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- July 27 Phase 1 Housing Pay Application Review Meeting: HUD / HABD / Design Team /
MGD / PMT
Weekly Progress Review Meeting: MGD / PMT
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- July 28 HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD /
PMT
Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS /
Schuel
Property Management Conference Call Meeting: MGD / IMS / PMT / HABD

5. Document Submissions and Notices

- June Progress Report submitted to HABD by PMT.
- Payment Application for Program Management fees submitted to HABD by PMT.
- Off-Site Developers RFP.
- Pay Applications
MGD Housing Units Invoice #6

PROJECT FINANCIAL STATUS

The PMT, Project Accountant, Dennis Mobley, continues to monitor the overall project financial status through HABD Finance Department. To date expenditures are in

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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.

- ❖ Phase 1 Building Construction Payment Request #6 has been reviewed and approved by the HUD Inspector, MGD and PMT and subsequently paid by HABD.

1. Phase II - Pre-Development Loan Financial Report

The amount approved for predevelopment activities associated with the Phase II development shall not exceed \$1,044,093.00 of which \$776,789.00 will be evidenced as cost reimbursables to the developer.

I. Payment Applications:

- a. Payment Application No. 1 – June 1st, \$ 689,449.46.
- b. Payment Application No. 2 – June 9th, \$ 47,860.24.
- c. Current Outstanding Balance \$ 306,783.55.

SCHEDULE REVIEW

- ❖ Relocation
Block A population is 34 households.
- ❖ Phase 1 Infrastructure Project
Construction proceeding. Anticipated completion August 22, 2004
- ❖ Phase 1 Site Remediation
In progress. Anticipated completion August 2004.
- ❖ Phase 1 Building Construction
In progress.
- ❖ Phase 2 – Building Construction
Issuance of NTP.
Construction Mobilization.
- ❖ Phase 2 – Financial Closing
Scheduled for late August 2004
- ❖ HUD Site Visit
August 24th & 25th, 2004.

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SECTION 2 OUTSTANDING ISSUES

KEY PROJECT ISSUES

- ❖ Phase 2 Infrastructure Project – completion of Construction Documents, Construction Bid-Out.
- ❖ Home Ownership Program
- ❖ City Approvals for Phase 2 Development – Building Permit
- ❖ Phase II - Financial Closing
- ❖ Phase II – Construction NTP
- ❖ Phase 3 Tax Credits
- ❖ Block 'A' conceptual design coordination and MOU with Jefferson County.
- ❖ Implementation of on-site Property Management Program and Marketing
- ❖ Off-Site Developers RFP - procurement

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SECTION 3 APPENDIX

- ❖ SITE UPDATE PHOTOS.
- ❖ KEY PROJECT ACTIVITIES SCHEDULE, 31July04.
- ❖ INFRASTRUCTURE SCHEDULE updated to 31July04.
- ❖ PHASE 1 CONSTRUCTION SCHEDULE updated to 31July04.
- ❖ PHASE 2 PROJECT IMPLEMENTATION SCHEDULE updated to 31July04.
- ❖ 60-DAY WORK IN PROGRESS SCHEDULE, 31July04.