

**HOUSING AUTHORITY of the BIRMINGHAM DISTRICT**

**PARK PLACE**

**PROGRESS REPORT  
June - 2004**

**Program Managers**

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July 8, 2004

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June 2004

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## **SECTION 1 STATUS REPORTS**

### **RESIDENT RELOCATION AND RETURNS**

June 2004

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

Of the total Block A population, twenty-seven households have been approved and are eligible to return to the new community. Three 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 is in the process of relocating households electing not to return to the new community. At least eighty-seven residents have expressed an interest in returning to the new community.

### **COMMUNITY and SUPPORTIVE SERVICES - CSS**

June 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 two families are enrolled in services, with two hundred thirteen of these families actively participating. Thru this endeavor, sixty-six residents are currently employed with an additional two persons enrolled in an eight week job training program.

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**

June 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 submitted proposals, and HABD has optioned to counter-offer the responders, of which two of the three refused the initial counter offer. HABD is currently evaluating how best to proceed with this procurement.

In Mason City, appraisals have been completed and reviewed by HABD Legal and offers are continuing to be presented to those property owners.

HABD is continuing negotiations with the City of Birmingham concerning sites in Fountain Heights and other Birmingham neighborhoods. The City of Birmingham has completed transfer of ten Fountain Heights properties to HABD and an 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.

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## **SECTION 1 STATUS REPORTS**

The Southampton Program has completed contract award and construction start for four additional homes. The contract has been prepared and submitted to the contractor for execution.

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**

June 2004:

#### **1. Project Implementation**

##### **A. Phase 2 Closing**

The Phase 2 Closing for HUD has been tentatively scheduled for July 27, 2004.

In advance of Closing, the Phase 2 Mixed Finance Proposal has been submitted to HUD and the Phase 2 Evidentiaries were submitted to HUD June 28<sup>th</sup>.

##### **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 6<sup>th</sup>.

##### **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 Services;**

Backfilling at Curbs

Installed Power Boxes for Traffic Signals

Installed Light Poles and pulled wired

Installed Ramp Borders and Foundations in the Mid-block Streets

Milling and Resurfacing of Streets

Installed Pavers & Sod;

Installed Landscape Irrigation System

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## **SECTION 1 STATUS REPORTS**

### **II. Housing Units;**

Installed Fire Water & Domestic Water Piping, secured City Inspector Approval;  
Block 'B', 'C', 'F'  
Installed Electrical & Plumbing Rough-Ins/Flowable Fill;  
Bldgs. 2, 3, 11, 18  
Poured Slabs on Grade, MEP underground rough-ins;  
Bldgs. 5, 6, 7, 8, 9, 10 (partial), 12,  
Installed Wall, Floor & Roof Trusses & Roofing;  
Bldgs. 6, 8, 9, 13, 16, 17  
Installed Masonry, Elect. & Plumbing Rough-ins  
Bldgs. 13, 16, 17  
Installed HVAC, Windows & Masonry  
Bldgs; 14, 15

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

The Infrastructure project continues to move ahead. The Contractor expects to complete the project by July 31<sup>st</sup>. The overall Infrastructure project is approximately 90% complete including the Sanitary Project which is 98% complete.

#### **I. Payment Applications:**

- a. MGD Invoice #19 – Infrastructure Construction Pay Application.

#### **II. Requests For Proposal in process to date:**

- a. Raise Manhole lid in Block D, Green Street - \$ 300.00 additional cost.
- b. Delete Installation of Green Street Asphalt Coat - \$ 9,400.00 deductive cost.
- c. Construct manhole @south intersection of 6<sup>th</sup> and 23<sup>rd</sup> Streets  
- \$25,828.00 additional cost.
- d. Additional sanitary sewer lateral in Block 'D' Green Street  
- \$ 6,196.00 additional cost.
- e. Adjust traffic utilities. - \$ 24,787.00 additional cost.
- f. Delete sod installation in the Green Streets - \$ 5,050.00 deductive cost.
- g. APCO temporary power installations for ROW lighting  
- \$11,428.00 additional cost.
- h. Relocate fire hydrants and utilities in sidewalks.  
- \$ 10,000.00 additional cost.
- i. Modifications to W.C. Ramps (mid-block) - \$ 18,142.50 additional cost.
- j. Modifications to Mid-block paver areas - \$ 12,471.00 deductive cost.
- k. Demolition and paver installation at main intersection corners  
- \$ 27,579.00 additional cost.
- l. Additional asphalt leveling material - \$ 30,000.00 additional cost.
- m. WWB material deposit fee refund - \$ 11,000.00 refund

#### **III. Change Orders issued to date:**

- a. To date, Eight Change Orders have been issued.

The original contract amount was	\$ 5,453,715.00
Net change by Change Orders	\$ 283,414.37
Current Contract Value	\$ 5,737,121.37

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## **SECTION 1 STATUS REPORTS**

### **IV. Minority Participation and Section 3 Resident Employment**

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

### **G. 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.

#### **I. Payment Applications:**

- a. None submitted in June.

#### **II. Requests For Proposal in process to date:**

- a. None submitted in June.

### **H. Phase 1 New Construction**

The Contractor, Integral/Doster Metro Gardens Joint Venture, has been proceeding with construction work on the Block 'B' & Block 'C' buildings. To date in Block 'B', two buildings have been enclosed, interior wiring, plumbing and sheetrock installation has begun, and window and brick installation has been completed. An additional two buildings have been framed to the roof trusses and the slab has been poured for the remaining building. On the northern half of Block 'C', framing for three of the building is at various stages, none have the roof framing yet. The slab pours have begun for the remaining building. On the southern half of the Block 'C', two slabs have been poured, the flowable fill for the foundations, underslab plumbing, electrical and sprinkler lines are being installed for the remaining building including the Leasing Center Building. In Block 'F', building pads have been prepared, and flowable fill for the foundations has been poured for these buildings.

The HUD inspector reviewed the project this month and Payment Request #5 was submitted by the Contractor and reviewed and approved by the HUD Inspector, Developer, Architect, and PMT.

#### **I. Payment Applications:**

- a. MGD Housing Invoice #5.

### **I. 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.

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## SECTION 1 STATUS REPORTS

### J. Approvals Status

- ❖ 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:  
Building Department permit approval prior to July 27<sup>th</sup>.  
DRC conditional approval per presentation July 14<sup>th</sup>.
- ❖ FHA  
Phase 2 Preliminary Application submitted February 19.
- ❖ HUD approved Budget Revision #2 and the Predevelopment Loan Agreement on June 25<sup>th</sup>.

### 2. MGD Work in Progress

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
- Management Plan for submission and approval.
- Block 'A' Development and coordination with Jefferson County
- Property Management services, including marketing and coordination/interaction with residents.

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

The RFP document has been modified and submitted to HABD for final review and comments and for Board review. This RFP is scheduled to be released in late-June.

### 4. Project Related Meetings

- ❖ June 1 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ June 2 HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT  
Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel  
Metropolitan Gardens Residents Meeting
- ❖ June 7 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams

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## **SECTION 1 STATUS REPORTS**

- ❖ June 8 Weekly Progress Review Meeting: MGD / PMT  
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ June 9 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
- ❖ June 14 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ June 15 Weekly Progress Review Meeting: MGD / PMT  
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ June 16 HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT  
Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel  
Metropolitan Gardens Residents Meeting
- ❖ June 17 Park Place – Monthly Executive Level Status Meeting
- ❖ June 21 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams  
HABD Board of Commissioners Meeting
- ❖ June 22 Weekly Progress Review Meeting: MGD / PMT  
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ June 23 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel  
Owner / Architect / Contractor Meeting
- ❖ June 28 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams  
Infrastructure Funding Conference Call
- ❖ June 29 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
- ❖ June 30 Board of Commissioners Executive Session  
Metropolitan Gardens Residents Meeting

### **5. Document Submissions and Notices**

- ❖ May Progress Report submitted to HABD by PMT.
- ❖ Phase II Evidentiary Documents, submitted to HUD.
- ❖ Phase II; Construction Documents for Permit Review
- ❖ Payment Application for Program Management fees submitted to HABD by PMT.
- ❖ Off-Site Developers RFP.
- ❖ Pay Applications  
MGD Infrastructure Invoice #19  
MGD Housing Units Invoice #5

## **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 compliance with Approved Predevelopment Budget expectations for Relocation, HABD Administration, Program Management fees and MGD costs including: Demolition,

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## **SECTION 1 STATUS REPORTS**

Infrastructure, MGD project management, Pre-Development Loan Agreement pertaining to Third Party Costs and Advance against Developer Fees.

Infrastructure payment Application #19 has been submitted, approved by the PMT and submitted to HABD.

- ❖ Phase 1 Building Construction Payment Request #5 has been reviewed and approved by the HUD Inspector, MGD and PMT and subsequently paid by HABD.

### **1. 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 1<sup>st</sup>, \$689,449.46.
- b. Payment Application No. 2 – June 9<sup>th</sup>, \$ 47,860.24.

## **SCHEDULE REVIEW**

- ❖ Relocation  
Block A population is 37 households.
- ❖ Phase 1 Infrastructure Project  
Construction proceeding. Anticipated completion July 31, 2004
- ❖ Phase 2 - DRC Landscape Documents Presentation  
Conditional approval presentation July 14<sup>th</sup>.
- ❖ Phase 2 - Closing  
Scheduled for July 27, 2004
- ❖ Phase 1 Building Construction  
In progress.
- ❖ Re-open Marconi Park  
Mid-July.

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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 – Approval by Building Department for Permit
- ❖ Phase 2 Mixed Finance Proposal and Evidentiary Documents – HUD approval
- ❖ Phase 2 Closing, HABD Board approval.
- ❖ City Approvals for Phase 2 Development – Building Permit
- ❖ Phase 2 Closing
- ❖ Phase 3 Tax Credits
- ❖ Off – Site Developers RFP
- ❖ Block 'A' conceptual design coordination and MOU with Jefferson County.
- ❖ Implementation of on-site Property Management Program and Marketing

### **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
- ❖ 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**

- ❖ SITE UPDATE PHOTOS.
- ❖ M/W/DBE PARTICIPATION UPDATE
- ❖ KEY PROJECT ACTIVITIES SCHEDULE, 06June04.
- ❖ INFRASTRUCTURE SCHEDULE updated to June 30, 2004.
- ❖ PHASE 1 CONSTRUCTION SCHEDULE updated to June 30, 2004.
- ❖ PHASE 2 PROJECT IMPLEMENTATION SCHEDULE updated to June 30, 2004.
- ❖ 60-DAY WORK IN PROGRESS SCHEDULE, 30June04.