

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

## PARK PLACE

### **PROGRESS REPORT May - 2004**

#### **Program Managers**

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June 10, 2004

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May 2004

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## **SECTION 1 STATUS REPORTS**

### **RESIDENT RELOCATION AND RETURNS**

May 2004

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

Of the total Block A population, twenty-six 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**

May 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.

A Job Readiness Training (JTR) class was held during the week of May 24<sup>th</sup>, with the focus being Life Management or Life Skills Sessions. Three residents participated in this class. Three residents from the April session have been awarded work experience scholarships. The next class is scheduled for late June.

A Senior Resource session is scheduled for late May/early June at a to be determined location.

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**

May 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, the opportunity for each to participate in this program based upon established criteria. HABD is currently negotiating with these proposers.

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## **SECTION 1 STATUS REPORTS**

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.

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**

May 2004:

### **1. Project Implementation**

#### **A. Phase 2 PreDevelopment Loan Agreement**

The HABD Board had approved the Pre-Development Loan Agreement that had been coordinated with the developer by the PMT. The document was forwarded to HUD for their approval; this approval was confirmed May 25<sup>th</sup>, 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**

The Phase 2 Closing for HUD has been tentatively scheduled for July 12, 2004.

In advance of Closing, the Phase 2 Mixed Finance Proposal has been submitted to HUD. Phase 2 Evidentiaries are scheduled for submission to HUD by June 15<sup>th</sup>.

#### **C. Phase 2 Design Development and Construction Documents**

The Phase 2 Construction Documents are 95% complete and scheduled to be submitted to FHA and the Permit Department for the permit review process by June 15<sup>th</sup>.

#### **D. 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.

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## **SECTION 1 STATUS REPORTS**

### **E. Project Construction Progress**

#### **I. Infrastructure Services;**

Installed Above Ground Electrical;	Blocks 'B', 'C', 'D' & 'E'
Installed Curb & Gutter	Blocks 'B', 'F'
Installed Landscape Irrigation System	Blocks 'B', 'C', 'E', & 'F'
Installed Water Services	Blocks 'C'

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

Installed Fire Water & Domestic Water Piping;	Block 'F'
Installed Electrical & Plumbing Rough-Ins/Flowable Fill;	Bldgs. 5, 7, 9, 10
Poured Slabs on Grade;	Bldgs. 6, 8,
Installed Wall, Floor & Roof Trusses;	Bldgs, 14, 15, 16, 17
Installed Masonry, Elect. & Plumbing Rough-ins	Bldgs; 14, 15

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

The Infrastructure project continues to move ahead. The Contractor expects to complete the project by June 30. As reported by the April Payment Application, the overall Infrastructure project is approximately 80% complete including the Sanitary Project which is 95% complete.

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

- a. MGD Invoice #17 – 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. Projected \$ 8,066.00 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. Projected \$ 10,000.00 additional cost.

#### **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	\$ 271,986.37
Current Contract Value	\$ 5,725,701.37

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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.

The plumbing subcontractor is completing sanitary connections to the new mains in the Right-Of-Way, as the system has been inspected and approved by Jefferson County.

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

- a. MGD Invoice #4 – Site Preparation Pay Application.

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

- a. None submitted in April.

### **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 begun. An additional two buildings have been framed to and including the second floor trusses and slabs have been poured for the remaining building. On the northern half of Block 'C', two building slabs have been poured, and flowable fill and slab edge forms have been placed for the other two buildings in preparation for the slab to be poured in early June. On the southern half of the Block 'C', the flowable fill for the foundations, underslab plumbing, electrical and sprinkler lines are being installed for a couple of buildings. In Block 'F', water lines and sprinkler lines are being installed.

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 #4.

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

- a. None submitted in April.

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## **SECTION 1 STATUS REPORTS**

### **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.

### **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:  
Planning Commission approval per presentation April 7<sup>th</sup>.  
DRC conditional approval per presentation April 14<sup>th</sup>.
- ❖ FHA  
Phase 2 Preliminary Application submitted February 19.
- ❖ HUD approved Budget Revision #2 and the Predevelopment Loan Agreement on May 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

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

The RFP draft document has been modified and submitted to HABD for comments. This RFP is tentatively scheduled to be released in early-June after approval by the HABD Board.

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## **SECTION 1 STATUS REPORTS**

### **4. Project Related Meetings**

- ❖ May 3 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ May 4 Weekly Progress Review Meeting: MGD / PMT  
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ May 5 HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT  
HABD Board Presentation Strategy Meeting: HABD Executive / MGD / PMT  
Metropolitan Gardens Residents Meeting
- ❖ May 10 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams
- ❖ May 11 Weekly Progress Review Meeting: MGD / PMT  
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS  
Marconi Park Progress Status Meeting: Melvin Miller – City of Birmingham Parks & Recreation / PMT / MGD / MCS
- ❖ May 12 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
- ❖ May 17 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams  
HABD Board of Commissioners Meeting
- ❖ May 18 Weekly Progress Review Meeting: MGD / PMT  
Weekly Infrastructure Project Review Meeting: MGD / PMT / MCS
- ❖ May 19 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel
- ❖ May 24 Phase 2 Conference Call Meeting: MGD / PMT / Legal Teams  
Block 'A' Status Conference Call: MGD / PMT
- ❖ May 25 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
- ❖ May 26 Weekly Infrastructure Project Construction Progress Meeting: MGD / MCS / Schoel  
HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT  
Metropolitan Gardens Residents Meeting

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

- ❖ April Progress Report submitted to HABD by PMT.
- ❖ Budget Revision #2 & Predevelopment Loan Agreement submitted to HUD for approval. Approval was granted, May 25<sup>th</sup>.
- ❖ Rental Term Sheet w/ Budget Exhibits/Proforma, submitted to HUD.
- ❖ Phase III; Tax Credit Application to AHFA
- ❖ HUD Approval Mixed Finance ACC Amendment.
- ❖ Payment Application for Program Management fees submitted to HABD by PMT.
- ❖ Off-Site Developers RFP – Draft.

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## **SECTION 1 STATUS REPORTS**

- ❖ Pay Applications
  - MGD Infrastructure Invoice #17
  - MGD Site Preparation Invoice #4
  - MGD Housing Units Invoice #4

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

Infrastructure payment Application #17 has been submitted, approved by the PMT and subsequently paid by HABD.

Phase 1 Building Construction Payment Request #4 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. None to date.

### **SCHEDULE REVIEW**

- ❖ Relocation
  - Block A population is 38 households.
- ❖ Phase 1 Infrastructure Project
  - Construction proceeding. Anticipated completion June 30, 2004
- ❖ Phase 2 Construction Documents
  - Completed and to be submitted for permit review, week of June 7<sup>th</sup>.
- ❖ Phase 2 Closing
  - Scheduled for July 12, 2004
- ❖ Phase 1 Soil Remediation Project
  - Work is progressing; Lateral connections inside property lines in process.

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## **SECTION 1 STATUS REPORTS**

- ❖ Phase 1 Building Construction  
In progress.
  
- ❖ Phase 2 Mixed Finance Proposal and Evidentiaries  
Mixed Finance Proposal submitted to HUD, with comments received and responses being prepared. Evidentiary Documents to be submitted, week of June 7<sup>th</sup>.

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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 – submittal to HUD
- ❖ City Approvals for Phase 2 Development – Building Permit
- ❖ Phase 2 Closing
- ❖ Phase 3 Tax Credits
- ❖ Off – Site Developers RFP
- ❖ 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**

- ❖ INVOICE REPORTS
  - Site Preparation Project
  - Infrastructure – Street Improvements – Sanitary Sewer Project
  
- ❖ SITE UPDATE PHOTOS.
  
- ❖ KEY PROJECT ACTIVITIES SCHEDULE, 08June04.
  
- ❖ INFRASTRUCTURE SCHEDULE updated to May 31, 2004.
  
- ❖ PHASE 1 CONSTRUCTION SCHEDULE updated to May 31, 2004.
  
- ❖ PHASE 2 PROJECT IMPLEMENTATION SCHEDULE updated to May 31, 2004.
  
- ❖ 60-DAY WORK IN PROGRESS SCHEDULE, 08Jun04.