

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

PARK PLACE

**PROGRESS REPORT
February 2005**

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March 8, 2005

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SECTION 1 STATUS REPORTS

RESIDENT RELOCATION AND RETURNS

February 2005

The resident population of Metro Block A is twenty-one households. Ten households have been relocated to the new units.

The HABD is planning to temporarily relocate the remaining Block 'A' residents, those who are scheduled to move into the new development after March 31, 2005. These residents are being relocated to a HABD site of their choice. They are still approved and will be relocated to the new development upon completion of their designated unit(s), but they are now being relocated pursuant to their safety and security concerns, caused by the diminishing population on this Block.

PROPERTY MANAGEMENT RECAP

February 2005

The Property Manager reports that speculative traffic continues to be strong. Upon issuance of the PTO (Permission To Occupy) certification from the HUD inspector, the keys to the units are released to the property manager from the contractor. To date fifty-one units have been released to the property manger.

Buildings acquired from the contractor;
Phase I: Buildings 9, 12, 13, 14, 15, 16 & 17
Phase II: None

Occupied Units: Thirty-four
Market Rate Units – Fifteen
Affordable Units – Eight
Authority Assisted Units – Eleven

Applications Pending/Approved
Market Rate Units – None/Fourteen
Affordable Units – Fifteen/Twenty-Four
Authority Assisted Units – Thirty-five/Five
(w/ an additional three hundred fifty-one applicants on the Site Based Waiting List)

Currently, all of the one and two bedroom tax credit units are pre-leased throughout all of Phase 1 with five, three bedroom units remaining available in this phase.

COMMUNITY and SUPPORTIVE SERVICES - CSS

February 2005:

The United Way has completed their contractual obligation and provided a services close-out summary to the HABD.

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HOME OWNERSHIP PROGRAM

February 2005:

The contract with the real estate entities, procured to identify other potential properties for homeownership sites/acquisition, required additional adjustments. Execution of this contract with the vendors is expected to occur early in March.

In Mason City, additional appraisals are being procured for review by the HABD Legal staff. 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 from the property owners in this area.

The HABD Home Ownership program is continuing. The program is working to solicit for additional persons for the program, working with the City, Homes program and to solicit marketing materials to promote this endeavor.

PROJECT PROGRESS OVERVIEW

February 2005:

1. Project Implementation

A. Phase 3 Design Development and Construction Documents

The development of financial and design strategies towards implementation of the Block 'A' revitalization, also in concert with efforts to work with Jefferson County are currently being studied and reviewed by the Development team.

Options have been presented and are currently being refined.

B. 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 is planned to commence in mid-April after relocation of the remaining Block 'A' residents.

C. Project Construction Progress

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

The first phase of the Infrastructure improvements has been completed. The next phase is anticipated to commence soon. Retainage fees to the contractor are being processed.

a. Payment Applications:

MGD Invoice #26 – Infrastructure Construction Pay Application.

b. Requests For Proposal:

None Outstanding

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c. **Change Orders** issued to date:

To date, Ten Change Orders have been issued.

The original contract amount was \$ 5,453,715.00

Net change by Change Orders \$ 371,270.96

Current Contract Value \$ 5,824,985.96

II. **Phase I - New Rental Units Construction;**

- a. **Payment Applications:** The HUD inspector reviewed the project this month and Partial Payment Request #13 was submitted by the Contractor and reviewed and approved by the HUD Inspector, Developer, Architect, and PMT.

❖ MGD Housing Invoice #13 was submitted to HABD for payment in February.

- b. **Construction Progress** – Approximately 80% complete, based on the total construction contract value;

Block 'B' - South

General Items

- Exterior Sidewalks = 100%

Buildings 14 & 15 (Type 3A)

- Building Completion – 100%

Building 17 (Type 6 West)

- Building Completion – 100%

Building 16 (Type 6 East)

- Building Completion – 99%

Building 13 (Type 3C)

- Building Completion – 100%

Building 12 (Type 04)

- Building Completion – 100%

Block C - North

General Items

- Parking Lot Installation - 75%

Building 10 (Type 04)

- Finished Carpentry – 85%
- Doors – 70%
- Cabinets – 80%
- Painting & Decorating – 45%

Building 09 (Type 3C)

- Carpet - 100%
- Resilient Flooring – 100%
- Ornamental Metals - 100%
- HVAC – 100%

Building 08 (Type 3A)

- Metals – 100%
- Cabinets – 100%
- Painting & decorating – 90%
- Finished Carpentry – 100%
- Resilient Flooring – 100%

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Building 06 (Type 3A)

- Doors – 85%
- Painting & Decorating – 25%
- Cabinets – 100%
- Carpet – 10%

Block C - South

General Items

○

Building 18 (Leasing Office)

- Masonry Install – 40%

Building 11 (Type 04)

- Finished Carpentry – 80%

Building 07 (Type 3A)

- Doors – 85%
- Painting & Decorating – 25%
- Cabinets – 100%

Building 05 (Type 3A)

- Finished Carpentry – 68%
- Doors – 80%
- Painting & Decorating – 25%
- Cabinets – 100%

Building 04 (Elevator Building)

- Rough Carpentry – 35%

Block F - West

General Items

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Building 03 (Type 04)

- Masonry Installed – 97%
- Metals – 50%
- Finished Carpentry – 30%
- Insulation – 100%
- Windows – 98%

Building 02 (Type 03)

- Masonry Installed – 80%
- Insulation – 100%
- Windows – 100%
- Drywall – 65%
- Electrical rough-in – 80%

Building 01 (Type 3D)

- Masonry Installed – 80%
- Electrical Rough-in – 50%

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c. 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. HABD staff continues to work with the contractor and attend weekly meetings with the sub-contractor encouraging participation.

Section 3 Participation	
Total project -	47%
Jefferson County Section 3 -	29%
Outside JeffCty Section 3 -	18%

III. Phase II - New Rental Units Construction;

- a. Construction Progress** – Approximately 01% complete, based on the total construction contract value;

IV. 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 January.
- b. Requests For Proposal** in process to date:
None submitted in January.

D. Approvals Status

- I. For Building 9, 12, 13 & 16 TCO from City, PTO from HUD Inspector.

2. MGD Work in Progress

- A. MGD is currently focused on the following activities:
 - I. Completion of Phase 1 Site Preparation-Soil Remediation Project.
 - II. Phase I, Building Construction Project.
 - III. Phase II, Infrastructure Project planning/implementation.
 - IV. Phase II, Building Construction Project.
 - V. Phase III Block 'A' Development and coordination with Jefferson County/HABD.
 - VI. AHFA Tax Credit Application for Phase III.
 - VII. Coordination with City of Birmingham Parks and Recreation Department regarding Marconi Park.
 - 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 was released and forwarded to potential proposers, September 8th.

The Pre-proposal Conference was held September 23rd. Ten proposer entities were represented at this meeting which was chaired by the PMT.

One proposal was received on September 30th, from Pennrose Properties, LLC. Formal evaluation of the proposals has been authorized to proceed. A recommendation to negotiate will be pending the result of the evaluation process.

4. Project Related Meetings

February 1

Phase III Master Planning Conference Call: MGD / PMT

February 7

Weekly Progress Review Meeting: MGD / PMT

Phase III Development Review Meeting: MGD / PMT

February 8

Phase III Development Review Meeting: MGD / PMT

February 14

Weekly Progress Review Meeting: MGD / PMT

Phase III Development Review Meeting: MGD / PMT

February 15

PTO Walk of Buildings 13 & 16: HABD / PMT / MGD HUD Inspector

Block 'A' Residents Meeting

February 16

Monthly Financial Reconciliation Process Meeting: HABD / PMT

Owner / Architect / Contractor meeting at the project site. MGD / PMT / HABD

February 14

Weekly Progress Review Meeting: MGD / PMT

HABD Board of Commissioners Meeting

Phase III Development Review Meeting: MGD / PMT

February 23

Block 'A' Business Terms Clarifications Meeting; PMT / MGD

HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT

Project Monthly Executive Level Meeting: HABD / MGD / PMT

February 28

Weekly Progress Review Meeting: MGD / PMT

Phase 1 Housing Pay Application Review Meeting/ PTO Walk of Buildings 9 & 12: HUD / HABD / Design Team / MGD / PMT

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5. Document Submissions and Notices

- January Progress Report submitted to HABD by PMT.
- United Way CSS Final Report
- PTO, TCO & AIA Substantial Completion Forms
 - For Building 09
 - For Building 12
 - For Building 13
 - For Building 16
- Pay Applications
 - MGD Infrastructure Invoice #26
 - MGD Housing Units Phase I; Invoice #13
 - MGD Housing Units Phase II; Invoice #2

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.

- ❖ Phase I; Building Construction Payment Request #13 has been reviewed and approved by the HUD Inspector, MGD and the PMT.
- ❖ Phase II; Building Construction Payment Request #2 has been reviewed and approved by the HUD Inspector, MGD and the PMT.
- ❖ Phase 1 Infrastructure Payment Request #26 has been reviewed and approved by MGD and the PMT.

SCHEDULE REVIEW

- ❖ Relocation
 - Block 'A' population is 21 households.
 - Ten Block 'A' households have been relocated into the new development.
- ❖ Phase 1 Building Construction
 - In progress.
- ❖ Public Housing Resident Relocations into new Development.
- ❖ Public Housing Resident Relocations away from Block 'A'.
- ❖ Implementation of leasing new units.
- ❖ Phase 2 – Building Construction
 - Construction Services.

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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
- ❖ 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.
- ❖ MGD INFRASTRUCTURE PROGRESS PAYMENT SUMMARY No. 26.
- ❖ KEY PROJECT ACTIVITIES SCHEDULE, 28February05.
- ❖ PHASE 1 CONSTRUCTION SCHEDULE, updated to 28February05.
- ❖ PHASE 2 PROJECT IMPLEMENTATION SCHEDULE, updated to 28February05.
- ❖ 60-DAY WORK IN PROGRESS SCHEDULE, updated to 28February05.