

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

TUXEDO COURT

PROGRESS REPORT
August 2009

Program Managers

BOULEVARD GROUP INC.

484 Boulevard SE
Atlanta, GA. 30312

Tel. 404.622.7879
fax 404.622.9395

2323 – 1st Avenue North
Birmingham AL 35203

Tel. 205.327.2702
fax 205.327.2704

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TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
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TABLE OF CONTENTS

SECTION 1	Executive Summary
SECTION 2	Status Reports
	<ul style="list-style-type: none">• Resident Relocation and Returns• Community and Supportive Services – CSS• Project Progress Overview<ol style="list-style-type: none">1. Project Implementation2. Construction Progress3. Project Related Meetings4. Procurements Status5. Document Submissions and Notices• Project Look Ahead• Financial Review<ol style="list-style-type: none">a. Payment Applications
SECTION 3	Informational Photographs

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009

SECTION 1 EXECUTIVE SUMMARY

PROJECT PROGRESS OVERVIEW August 2009

- *Fountain Heights* – Closeout of the contract is in progress; the final pay request has been received from the contractor. To date, eighteen (18) houses have closed.
- *Infrastructure Services* – Approximately 90% of the work is complete. Sidewalks and final paving remain.
- *Rental Units Construction* – Capstone Building Corporation is progressing with the building construction. Construction is 93% complete on Phase I and 61% complete on Phase II. The initial punch walkthrough has been conducted on six (6) buildings.
- *Property Manager RFP* – The contract documents have been executed by HJ Russell.
- *Tax Credit Closing* – The equity provider, RBC, is currently in the process of securing an upper tier investor for Phase II.
- *ALDOT Trail* – Design efforts are complete. The plans have been approved by ALDOT. A schedule for advertising and bidding is underway.
- *Gateway Park* – The construction services will be out for bid in early August 2009 with a bid opening scheduled for September 2009.

**SECTION 2
STATUS REPORTS**

RESIDENT RELOCATION AND RETURNS

August 2009:

All residents of Tuxedo Court have been relocated to other housing communities and locations selected by the residents as of November 15, 2005.

The HABD staff will continue to coordinate with the relocated residents of Tuxedo Court, providing status updates regarding the progress of this revitalization program; updates on HUD coordination's and related requirements; updates regarding program procurements; and updates regarding homeownership opportunities. Relocated residents will receive updates on the transition process back to the new development, upon the complete development of the return criteria.

Plans to provide the residents with an updated overview of the program, status updates of the infrastructure and housing construction projects, and the development of the return criteria need to be revisited. The procurement of a Property Manager for the development has been issued. Six proposals were received on February 17, 2009. An evaluation team reviewed the submitted proposals. A recommendation to the HABD Board of Commissioners was presented and approved at the April 2009 Board Meeting. HJ Russell is the procured property management firm. The contract documents have been executed by HJ Russell.

Numerous interested potential residents have expressed interest in living at Tuxedo Court. Members of the project management team receive daily calls from individuals asking about the new community. A temporary phone line has been established to accept calls and provide information to interested parties. Approximately thirty (30) calls per day are received.

COMMUNITY AND SUPPORTIVE SERVICES - CSS

August 2009:

JCCEO continues to collect data through case management and assist residents by providing CSS services. JCCEO hosts activities to assist residents towards financial independence and are meeting the needs and family goals for the families. JCCEO utilizes its Outcome Results System (ORS) for capturing statistics of assessments and focus groups. Residents continue to receive assistance with basic needs, job readiness training, educational assistance, entrepreneurial training sessions, and childcare assistance.

Offsite outreach efforts for former residents are continuing. JCCEO monitors the progress of residents towards goals of self-sufficiency.

JCCEO case workers provided services to address the following needs of families from Tuxedo Court: Fourteen (14) residents are participating in the nutrition education program. Seven (7) residents received assistance with credit counseling. One (1) resident is enrolled in the substance abuse treatment program. One (1) resident was approved for disability. Seven (7) residents have been employed for less than five months; thirty-three (33) residents have been employed for more than six months; currently, forty (40) residents of the current caseload are employed.

PROJECT PROGRESS OVERVIEW

August 2009:

1. Project Implementation

A. *Off-Site Development – Fountain Heights Homeownership Component*

- a. Homeownership opportunities in Fountain Heights are being promoted through the HABD staff with the distribution of the revised HABD Homeownership brochure, highlighting photographs and information about the homeownership program.
- b. Signage promoting homeownership opportunities are posted in and around the Fountain Heights neighborhood, and near Interstate 65 in the Fountain Heights area. Interested families are directed to contact the HABD Homeownership Coordinator.

I. *Site Acquisitions*

- a. Services complete.

II. *Off Site Development Process – 25 Single Family Homes in Fountain Heights*

- a. KSH Construction has completed the project. To date, the contractor has delivered twenty-five (25) houses as substantially complete.
- b. The contractor has submitted close out documents to the architect. Closeout is underway.
- c. Currently, HABD staff has secured twenty-three (23) sales contracts for the homes being constructed. The HABD has closed with eighteen (18) homeowners and additional closings are expected in the upcoming weeks.

III. *Market Studies*

- a. No additional activity at this time.

B. *On-Site Development – Tuxedo Court Property*

I. *Demolition*

- a. Services complete.

II. *Site Development / Public Improvements*

- a. Engineering Design Technologies, Inc. is the engineer of record for the re-bid process.
- b. In efforts to utilize the Jefferson County Commission as a funding source, and in association with comments Commissioner Langford expressed at the Tuxedo Court Groundbreaking ceremony, an interlocal agreement between the City and Jefferson County for funding for this project was approved by the Jefferson County Commission at its February 20, 2007 meeting. The interlocal agreement has been executed by both parties.
- c. The HABD/PMT Team is continuing to work and coordinate with the City regarding the infrastructure scope and budget. The Intergovernmental Agreement has been approved by the City Council and executed by the Mayor. An amendment to the Intergovernmental Agreement has developed and is being reviewed. The Program Management Team met with City Staff in early December 2008 regarding the amendment. The amendment was approved by the City Council at its March 2009 Council meeting.
- d. The HABD/PMT Team along with Williams Blackstock Architects and subconsultants prepared documentation to be submitted to the Alabama Department of Transportation (ALDOT) Transportation Enhancement (TE) Program through the City of Birmingham's Planning and Engineering Department. Annually, the ALDOT makes the TE Project available to cities and municipalities with request for proposals. The proposal included schematic design efforts for the proposed linear park at on-site Tuxedo Court and enhancements along the Interstate 20/59 corridor in the vicinity of Tuxedo Court. Notification of approval from ALDOT was received. The PMT met with the City's engineering staff regarding the status of the ALDOT grant. Design is complete. The plans have been approved by ALDOT. An advertising and bid schedule is being developed for review by the City.

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009

- e. The infrastructure construction was re-bid in order to receive the funding from the City. The proposed schedule for re-bid was:

Advertisement begins:	December 9, 2007
Pre-Bid Conference:	December 18, 2007
Bid Opening:	January 15, 2008
- f. Russo Corporation is approximately 90% complete with infrastructure services. Sidewalks and final paving remain.
- g. The HABD Board of Commissioners awarded the design services for the Tuxedo Court HOPE VI Community Center and Daycare Center to Herrington/TRI Joint Venture. A kick off meeting was held. Programs for design services are finalized. The architect has completed schematic design and is awaiting approval from HABD.
- h. Bhate Geosciences is providing geotechnical services for the construction.

III. Site Acquisitions

- a. No activity at this time.

IV. Rental Units Development – Phase I Housing

- a. The Architectural/Engineering Team of Williams Blackstock Architects has distributed construction documents for the housing development at the Tuxedo Court site. The project schedule is as follows:

Advertisement begins	December 18, 2006
Pre Bid Conference	January 10, 2007
Bid Opening	February 1, 2007

The bid submitted by Trawick Contractors was recommended to and approved by the HABD Board of Commissioners for award at the March 2007 Board Meeting. The contract has been signed by Trawick Contractors and returned to the HABD for signature.

- b. Coordination between the architectural/engineering team, the engineering team, HABD staff, City staff, and the PMT is ongoing, including design and strategic coordination efforts.
- c. The LIHTC application for this project was submitted to Alabama Housing Finance Authority on March 14, 2007. Tax credits were not awarded for this project. An out-of-cycle application was submitted. Tax credits were awarded in August 2007. The HABD has requested proposals for a financial entity to purchase the tax credits. The RFP for these services were submitted to the HABD on September 10, 2007. A recommendation to the HABD Board of Commissioners was made and approved at the October 2007 meeting. Boston Capital was approved for this process.
- d. The HABD Board of Commissioners approved the termination of the contract for construction services with Trawick Contractors.
- e. No construction activity to date.

V. Rental Units Development – Phase II Housing

- a. The Architectural/Engineering Team of Williams Blackstock Architects has distributed construction documents for the Phase II Rental units at the Tuxedo Court site. The project schedule is as follows:

Advertisement begins	December 9, 2007
Pre Bid Conference	December 18, 2007
Bid Opening	January 17, 2008

- b. The Housing Authority of the Birmingham District Board of Commissioners approved the contract for Phase II – Rental Units with Trawick Contractors.

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009

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- c. The LIHTC application for this project was submitted to Alabama Housing Finance Authority in March 2008. Additional information has been requested by the Alabama Housing Finance Authority. This information was forwarded on April 11, 2008.
 - d. Tax credits for the Phase II Housing project were awarded by the AHFA on June 17, 2008
 - e. The HABD Board of Commissioners approved the rejection of bids received for this project.
 - f. The rental housing development phases have been advertised for bid as one project including the 220 rental units of the project. The project schedule is as follows:

Advertisement begins	June 22, 2008
Pre Bid Conference	July 15, 2008
Bid Opening	August 5, 2008
 - g. No construction activity to date.

VI. Rental Units Development – Phase I and Phase II Housing

- a. Bids were received on August 5, 2008. Three (3) companies submitted bids – Capstone Building Corporation, White-Spunner Construction, and Wild Builders.
- b. At its August 2008 regular Board Meeting, the HABD Board of Commissioners approved the contract for construction services of the Rental Units Phase I and Phase II with Capstone Building Corporation. The contracts have been signed by all parties.
- c. A Notice to Proceed was issued to Capstone in early November 2008.
- d. Capstone is progressing with construction including site preparation, foundation installation, framing, roofing, rough plumbing, and electrical work. Work on Blocks 1, 2, 4, 5 6, 10 and 11 is continuing. Foundations are underway on an additional four (4) buildings. Construction is ongoing on twenty (20) buildings. The initial walkthrough of the four (4) buildings on Block 6 and two (2) buildings on Block 10 was held and a final punch list established. Phase I is approximately 93% complete; Phase II is approximately 61% complete.
- e. Bhate Geosciences is providing geotechnical services for the rental units' construction. Weekly logs are provided to the project management team regarding the testing services provided, the services conducted, and the recommendations for quality construction.
- f. The equity provider closing for Phase I construction is complete.

VII. Real Estate

- a. Negotiations are continuing with the property owners in the general vicinity of the defined Tuxedo Court revitalization area.

VIII. Market Studies

- a. The HABD Board of Commissioners awarded a contract for Market Studies and As-Built Appraisals to Baker Valuation at the January 2008 board meeting. A notice to proceed has been issued for these services.
- b. Baker Valuation has completed the Market Study and As-Built Appraisal for Phase I Rental Units within the required schedule.
- c. Baker Valuation has completed the Phase II As-Built Appraisal.

IX. Equity Provider

- a. The procurement for tax credit equity provider was issued. Proposals were received on August 19, 2008. Best and final offers from firms submitting proposals were received on August 29, 2008. The evaluation team reviewed the received proposals and provided a recommendation. The HABD Board of Commissioners approved RBC Capital as the equity provider at its September 2008 Board meeting.

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009

- b. The Program Management Team worked with RBC in preparation for the tax credit closing. Weekly progress meetings identifying due diligence are ongoing.
- c. The closing for Phase I is complete.
- d. RBC, the procured equity provider, is currently working to secure an upper tier investor for the Phase II construction.

X. Property Management Services

- a. A RFP for Property Management Services was issued on January 20, 2009. Proposals for the Property Management RFP were received on February 17, 2009. The Evaluation Team reviewed the proposals and recommended a firm.
- b. The recommendation to the HABD Board of Commissioners was presented and approved at the April 2009 Board Meeting. HJ Russell is the procured property management firm. A kick off meeting with HJ Russell was held. The contract has been executed by HJ Russell.

2. Construction Progress

Fountain Heights

- a. All houses included in the Fountain Heights project are substantially complete.
- b. The contractor has submitted the final closeout documents. Close out of the project is underway.

MBE/DBE and Section 3 Participation

The following is a breakdown of MBE/DBE/Section 3 company's participation in the current active project contracts to date.

	<u>% of Total Contract Value</u>
❖ Professional Services Contracts	
MBE/DBE/WBE Entities	32.0%
Local Companies	88.0%
❖ Demolition Services Contracts	
MBE/DBE/WBE Entities	9.0%
Local Companies	3.4%
❖ Sewer Capping Services Contracts	
MBE/DBE/WBE Entities	100.0%
Local Companies	100.0%
❖ Infrastructure Services Contracts	
MBE/DBE/WBE Entities	45.7%
Local Companies	100.0%
❖ Community and Daycare Centers Design Contract	
MBE/DBE/WBE Entities	50.0%
Local Companies	100.0%
❖ Rental Units Construction Services Contract	
MBE/DBE/WBE Entities	25.3%
Local Companies	85.7%

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009

The following companies are participating in the Section 3 program as noted. Miles College with one (1) employee; JCCEO with one (1) employee; Capstone with one (1) employee and one Section 3 sub-contractor; and Engineering Design Technologies with two Section 3 companies. Williams Blackstock Architects, Herrington/TRI, Banks, Finley & White Co., Capstone and Klein-Hornig are participating in the scholarship program.

3. Project Related Meetings

- ❖ August 4 Building Walkthrough at Tuxedo
- ❖ August 6 HUD Monitoring Review
- ❖ August 11 OAC Meeting – Rental Units Progress
- ❖ August 17 HABD Board of Commissioners Board Meeting
- ❖ August 18 Property Manager Meeting
- ❖ August 18 Building Walkthrough at Tuxedo
- ❖ August 19 PMT Team Conference Call/Meeting
- ❖ August 25 OAC Meeting – Rental Units Progress
- ❖ August 27 Building Walkthrough at Tuxedo

4. Procurements

- ❖ None

5. Document Submissions and Notices

- ❖ July 2009 Program Report
- ❖ AHFA Due Diligence Requirements
- ❖ AHFA TCAP Application Submission

PROJECT LOOK AHEAD

30 – 60 Day Look Ahead:

- ❖ Fountain Heights Homeownership Closings
- ❖ Construction of Multifamily Rental Units
- ❖ Equity Provider Coordination/Tax Credit Closing – Phase II
- ❖ AHFA Supporting Documentation
- ❖ Procurement of Monitoring Services for the Fire Alarm Systems
- ❖ Procurement of Construction Services for the Gateway Park

FINANCIAL REVIEW

August 2009

The PMT is currently working with the HABD staff to reconcile on a monthly basis the project's financial information.

1. Payment Applications

- a. Williams Blackstock Pay Request #36
- b. Williams Blackstock Pay Request #37
- c. Capstone Building Corporation Pay Request #9
- d. Infrastructure Pay Request #18

TUXEDO COURT

**HOUSING AUTHORITY
of the Birmingham District**

**PROGRESS REPORT No. 62
August 2009**

**SECTION 3
INFORMATIONAL PHOTOGRAPHS**



**TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
BLOCK 2**



**TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
BLOCK 6 – LOOKING EAST**

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009



TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
COMMUNITY BUILDING - BLOCK 4



TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
FOUNDATION CONSTRUCTION - BLOCK 7

TUXEDO COURT

**HOUSING AUTHORITY
of the Birmingham District**

**PROGRESS REPORT No. 62
August 2009**



**TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
COMPACTION PROCESSES – BLOCK 5**



**TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
SIDEWALK CONSTRUCTION – BLOCK 2**

TUXEDO COURT

HOUSING AUTHORITY
of the Birmingham District

PROGRESS REPORT No. 62
August 2009



TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
LANDSCAPING SERVICES – BLOCK 6



TUXEDO COURT
RENTAL UNITS CONSTRUCTION PROGRESS
GAZEBO – BLOCK 6