

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

TUXEDO COURT

**PROGRESS REPORT
March 2008**

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April 9, 2008

TUXEDO COURT

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of the Birmingham District

PROGRESS REPORT No. 45
March 2008

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SECTION 1 EXECUTIVE SUMMARY

PROJECT PROGRESS OVERVIEW

- *Fountain Heights* – the contractor has delivered seven (7) substantially complete houses. The delivery of houses at sites 8, 9, 10, 11, 13, 20, and 25 are expected by April 30, 2008. Approximately 80% of the contract is complete.
- *Infrastructure Services* – HABD staff issued the notice to proceed for these services to the contractor, Russo Corporation. Construction is underway. Approximately 1,260 linear feet of 8-inch sanitary sewer has been completed. Approximately 2% of the contract has been expensed.
- *Demolition of the community and daycare centers* – HABD staff issued the notice to proceed for these services to the contractor, TriStar. Demolition is underway.
- *Design of the community and daycare centers* – A kick off meeting was held with the procured design firm, Herrington Architects//TRI Joint Venture to begin the design services for the new community and daycare centers at Tuxedo Court.
- *MBE/DBE/WBE Participation* – Russo Corporation has hired one (1) participant in meeting the Section 3 requirements as outlined in the contract. Russo Corporation has 45.7% MBE/DBE/WBE subcontractor participation on the infrastructure project.
- *Surveying Services* – The notice to proceed for additional surveying services, procured via Request for Quotes, was issued to Beacon Professional Services. Work has started.
- *Procurement of Geotechnical Services* – The selected evaluation team has recommended a firm for approval of geotechnical services. The recommendation will be presented at the April 2008 HABD Board of Commissioners meeting.
- *ALDOT Coordination TE Grant Program* – the PMT forwarded a fee proposal to the City. The City will prepare contract documents for execution.
- *AHFA* – an application to receive tax credits from AHFA was submitted. Additional information was requested. The PMT has compiled the requested information for use in the review of the 2008 AHFA LIHTC application process.

SECTION 2
STATUS REPORTS

RESIDENT RELOCATION AND RETURNS

March 2008:

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. The return criteria will be completed upon issuance of the RFP for Property Management Services for this site.

The HABD/PMT will provide the residents with an overview of the program, status updates of the infrastructure and housing construction projects, and the development of the return criteria. Meetings have taken place at the Elyton and Smithfield communities.

COMMUNITY AND SUPPORTIVE SERVICES - CSS

March 2008:

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. The current case load includes eighty-three (83) former Tuxedo Court residents.

JCCEO case workers provided services to address the following needs of families from Tuxedo Court: prepared sixty-one (61) service referrals for thirty-five (35) Tuxedo Court residents for employment, basic needs, financial, medical, and childcare assistance. Twenty (15) residents are currently enrolled in the Employment preparation/placement program. Four (4) residents are enrolled in the job skills training program. Two (2) residents gained employment; currently, fifty-five (55) residents of the current caseload are employed.

PROJECT PROGRESS OVERVIEW

March 2008:

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.

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- 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. HABD has site control of properties to build twenty-five (25) of the twenty-five (25) homes. Closings are being scheduled.

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

- a. KSH Construction is progressing with approximately 80% of the project complete. Construction has begun on twenty-three (23) houses. To date, the contractor has delivered seven (7) houses as substantially complete. Sites 8, 9, 10, 11, 13, 20, and 25 are anticipated by April 30, 2008.
- b. Currently, HABD staff has secured twenty-three (23) sales contracts for the homes being constructed. The HABD has closed with one (1) homeowner and several closings are expected in the upcoming weeks.
- c. The home at site 17 in Fountain Heights experienced fire damage. The police department and contractor's insurance company have investigated the site. The contractor has received direction from its insurance company and will start work in the upcoming weeks.

III. Market Studies

- a. No additional activity at this time.

B. On-Site Development – Tuxedo Court Property

I. Demolition

- a. Demolition plans have been developed to demolish the existing daycare and community centers at Tuxedo Court. Bids for this demolition were submitted on September 11, 2007. Four (4) bids were received. The HABD Board of Commissioners approved TriStar as the lowest responsible, responsive bidder at its September 2007 meeting.
- b. The preconstruction conference was held on January 31, 2008. The demolition contractor has provided submittals for review and approval. Additional information requested from the contractor was received.
- c. The contractor is coordinating with the City of Birmingham to receive permits and with the Jefferson County Environmental Services Department to acquire approval for the sewer plugs. Upon approval of the submittals and the necessary permits, a notice to proceed was issued. Demolition is underway.

II. Site Development / Public Improvements

- a. USInfrastructure, Inc. developed the construction bid package (specifications and plans) for infrastructure improvements at Tuxedo Court, in coordination with the housing units design, being developed by Williams-Blackstock Architects. US Infrastructure has evaluated the bids to certify the lowest responsible, responsive bidder. The HABD Board of Commissioners elected to reject all bids submitted for this project at its April 2007 board meeting. The project was rebid. The HABD Board of Commissioners elected to approve the lowest responsible, responsive bidder, Russo Corporation, at its June 2007 Board of Commissioners meeting. The contracts were executed by both parties. The HABD Board of Commissioners voted to terminate the contract executed with Russo Corporation at its November 2007 Board meeting due to the City's assessment of non-compliance in the procurement process. The project was re-advertised. Bids were opened in January 2008. 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

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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.
- 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. The PMT has forwarded a fee proposal from the architect to the City. The City is preparing contract documents for the design.
- e. The City has elected to not fund the infrastructure construction due to its assessment of non-compliance in the procurement process. The City has agreed to provide funding contingent upon the HABD re-bidding the infrastructure construction in compliance with the intergovernmental agreement. The City has approved the current re-bid process.
- f. The infrastructure construction will be re-bid in order to receive the funding from the City. The proposed schedule for re-bid is as follows:

Advertisement begins:	December 9, 2007
Pre-Bid Conference:	December 18, 2007
Bid Opening:	January 15, 2008
- g. The infrastructure construction services project was rebid. The Housing Authority of the Birmingham District Board of Commissioners voted to delay the award of contract with efforts to finalize a pending claim from the recommended contractor.
- h. The HABD Board of Commissioners voted to approve the infrastructure services in a Special Board Meeting. The contractor, Russo Corporation, has provided bonds and insurance with a signed contract to the HABD. A notice to proceed was issued.
- i. 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.
- j. A RFP for geotechnical services was issued. The evaluation team will forward a recommendation to the Executive Director for presentation at the April 2008 HABD Board of Commissioners meeting.

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.

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- 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. 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.
- 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 will be forwarded by April 11, 2008.
- d. No construction activity to date.

VI. Real Estate

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

VII. 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.

2. Construction Progress

Fountain Heights – Completion to date, March 31, 2008.

Lot 1

- Overall completion 100%

Lot 2

- Overall completion 100%

Lot 3

- Overall completion 100%

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Lot 4	
• Overall completion	100%
Lot 6	
• Overall completion	100%
Lot 8	
• Overall completion	100%
Lot 9	
• Overall completion	91%
Lot 10	
• Overall completion	90%
Lot 11	
• Overall completion	93%
Lot 12	
• Overall completion	87%
Lot 13	
• Overall completion	78%
Lot 16	
• Overall completion	80%
Lot 17	
• Overall completion	61%
Lot 18	
• Overall completion	79%
Lot 20	
• Overall completion	81%
Lot 21	
• Overall completion	73%
Lot 22	
• Overall completion	68%
Lot 23	
• Overall completion	71%
Lot 25	
• Overall completion	100%
Lot 26	
• Overall completion	80%

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-
- Lot 27**
 - Overall completion 70%

 - Lot 40**
 - Overall completion 100%

 - Lot 41**
 - Overall completion 100%

C. 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%

The following companies are participating in the Section 3 program as noted. Miles College with one (1) employee; JCCEO with one (1) employee; KSH with two (2) employees via its subcontractors; Russo with one (1) employee; and Williams Blackstock Architects and Klein-Hornig/Gaines LLC are participating in the scholarship program.

The Section 3 Coordinator is contacting Engineering Design Technologies and TriStar regarding the requirements of the program.

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3. Project Related Meetings

- ❖ March 4 Fountain Heights Construction Progress Meeting
Geotechnical Services RFP Pre-proposal Conference
- ❖ March 5 HOPE VI Update Meeting
- ❖ March 12 PMT Team Conference Call/Meeting
- ❖ March 17 HABD Board of Commissioners Monthly Meeting
- ❖ March 18 Geotechnical Services Proposals Due
Fountain Heights Construction Progress Meeting
- ❖ March 19 HOPE VI Update Meeting
- ❖ March 25 Infrastructure Services Progress Meeting
Kick Off Meeting – Community Center and Daycare Center Design
- ❖ March 26 PMT Team Conference Call/Meeting
- ❖ March 31 Geotechnical Services – Evaluation Team Meeting

4. Procurements

- ❖ RFP - Geotechnical Services

5. Document Submissions and Notices

- ❖ February 2008 Program Report
- ❖ Submittal of AHFA Tax Credit Application for Phase II Rental Units
- ❖ Notice to Proceed - Site Engineering and Infrastructure Construction Services Construction
- ❖ Notice to Proceed - Architectural and Engineering Services for Daycare Center and Community Center at Tuxedo Court
- ❖ Notice to Proceed - Demolition of Daycare and Community Centers at Tuxedo Court
- ❖ Notice to Proceed – Surveying Services
- ❖ AHFA – Status Report

PROJECT LOOK AHEAD

30 – 60 Day Look Ahead:

- ❖ Intergovernmental/Interlocal Agreements coordination with the City
- ❖ Housing Development, Multifamily Phase I Closing
- ❖ AHFA Supporting Documentation
- ❖ Fountain Heights Homeownership Closings

FINANCIAL REVIEW

March 2008

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

1. Payment Applications

- a. KSH Construction Pay Request #24
- b. KSH Construction Pay Request #25
- c. Williams Blackstock Pay Request #24
- d. EDT Pay Request #3
- e. EDT Pay Request #4
- f. Russo Corporation #1

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**SECTION 3
INFORMATIONAL PHOTOGRAPHS**



**TUXEDO COURT
LOT 8 IN FOUNTAIN HEIGHTS
FINISHING TOUCHES**



**TUXEDO COURT
LOT 25 IN FOUNTAIN HEIGHTS
CONSTRUCTION PROGRESS**

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**TUXEDO COURT
LOT 40 IN FOUNTAIN HEIGHTS
FINISHING TOUCHES**



**TUXEDO COURT
LOT 41 IN FOUNTAIN HEIGHTS
CONSTRUCTION PROGRESS**

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**TUXEDO COURT
INFRASTRUCTURE CONSTRUCTION
SANITARY SEWER**



**TUXEDO COURT
INFRASTRUCTURE CONSTRUCTION
TRENCHING**