



HOUSING AUTHORITY of COLUMBUS GEORGIA

**PEABODY APARTMENTS
HOPE VI REVITALIZATION**

**PROGRESS REPORT
June 2004**

Project Website – www.peabodyhopevi.org

BG/WRT Program Management Team



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July 07, 2004

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PROJECT IMPLEMENTATION

SECTION 1 STATUS REPORTS

Predevelopment – General Overview and Summary June 2004

Administration:

Site Control Agreement between HACG and Integral pertaining to the Demolition Project and the Notice To Proceed are ready for implementation subject to HACG receipt of the signed contract between Integral and the Demolition Contractor.

Infrastructure Construction Services Agreement between HACG and Integral pertaining to the Intergovernmental Agreement is in process of review and comment with the respective attorneys. Additional Articles relating to Integral Construction Management Services are being discussed for incorporation into the Agreement. The intention being to avoid an additional legal Agreement specifically for Integral Construction Management Services.

The consultant procurement process to be implemented by the Developer has been discussed and resolved. This item concerns consultant services required for Wynnton Site Development, Infrastructure at the Wynnton and Peabody Sites, the architectural and engineering team for the Peabody Development Project. Integral has submitted draft copy of their proposed Consulting Services RFQ. HACG's/PMT comments on the document have been returned to Integral.

Peabody Phase 1 Tax Credit Application: The tax credit application was submitted as required on May 04. Notice of Award is expected by September 01.

Resident Relocation Project: remains ongoing. The Phase 2 Relocation Project was complete as of June 16. As of July 07 there were 31 families remaining on site in the Phase 3 Area, the majority of these are on the Section 8 housing list.

CSS Program: ongoing and progressing extremely well. All Peabody Households have been interviewed and all assessments have completed for families participating in the CSS Program.

Peabody Demolition: the Developer and Bianchi Industrial have been in ongoing discussions concerning terms of the Demolition Contract. Execution of the Contract has been completed as of July 01. A Construction Start-Up meeting has been scheduled for July 09.

Wynnton Site Property transfer: documents have been submitted to the City Attorney for the purpose of finalizing the Promissory Note and completing the transfer. A final Site Survey Drawing has been submitted to the City for approval.

Intergovernmental Agreement: this item remains a critical issue for the advancement of the HOPE VI Project, particularly the Wynnton Project which is currently scheduled to start construction in October, 2004. The Agreement is ready for signatures pending verification and approval of an Infrastructure Construction Services Agreement between HACG and the Developer. As noted above, attorneys are in process of debating terms and writing language to define Integral Construction Management for the Infrastructure Project.

Homeownership Proposal: the Document Package was received by HUD as of July 01. Project Teams have been focused on document preparation through the month of June. Preparation of Evidentiary Documents has started in readiness for a HUD Closing process in September.

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PROJECT PROGRESS OVERVIEW

SECTION 1 STATUS REPORTS

I ADMINISTRATION

Master Developer Agreement (MDA) – the Second Amendment to the Agreement is under discussion between the Developer, HACG and the PMT. This Amendment will clarify the Developer's intentions concerning the Project Design Team.

Pre-Development Loan Agreement – Invoice #2 has been submitted to HACG for payment. Funds for these costs are derived from the HOPE VI Grant funds.

Integral-CHI Builder Agreement – The Final Agreement has not been received from the Developer.

Wynnton Site Property Transfer – HACG and City of Columbus are nearing completion of the Transfer Process. The City Attorney is doing a final review of the documents and preparing the final Promissory Note. A revised site survey drawing has been submitted to the City for approval and signature. From the perspective of HACG, the process is ready for conclusion.

Intergovernmental Agreement – conclusion of the Agreement is critical for advancing the project. In view of the Wynnton Project Closing and construction start scheduled for October 2004 it is imperative that infrastructure design and construction for the Wynnton Site be initiated as soon as possible.

During the month of June, the respective legal teams have been reviewing and revising the HACG-Integral Infrastructure Construction Services Agreement. As of month end the document has been re-submitted to Integral legal for another review and comment process.

Finalizing this Agreement is prerequisite to the City executing the Intergovernmental Agreement.

Design and Engineering Team Procurement – the Developer has provided clarification concerning their consultant procurement process and has requested sole source procurement for some services.

Having reviewed the Developer Procurement Proposal, the PMT have advised the Developer to implement an open competitive process for consulting services relative to infrastructure design, market studies and architectural design. In response, the Developer has submitted a draft copy, Request For Qualifications to the PMT for review and comment.

Developer procurement for engineering services needed for the Infrastructure Project will commence subsequent to approval of the Intergovernmental Agreement.

Developer procurement for architectural services required for the Peabody Project will commence as soon as possible in order to comply with project schedule requirements.

Homeownership Plan – due to changes in the HUD approval process; a formal submission to HUD is not required for this item. Further to meeting discussions, the Developer will complete the Document and incorporate the Homeownership Plan into the Evidentiary Document package required for the Homeownership Program HUD Closing Process.

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Item I ADMINISTRATION - continued

Section 3 Plan – review comments have been provided to the Developer and the PMT have requested the Developer to prepare and submit a complete and formal Pan.

Resident Relocation: Phase 1 Resident Relocation is complete. Phase 2 Relocation is complete. Phase 3 Relocation is progressing ahead of schedule. HACG Admin, the Relocation Team and the Resident Advocates continue to exercise professional expertise, leadership and sensitivity in accomplishing a difficult project objective. The Relocation Project is expected to be totally complete by September 01, in advance of original planned schedule.

HOPE VI Program Evaluation: CSU are actively engaged in the Project. A progress review with CSU is expected in the near future.

Homeownership Proposal – the Developer, with detail input from HACG and the PMT, has completed preparation of the Wynnton Homeownership Proposal. Completion of this document submission is the first primary step in advancing the project to the HUD Closing Process.

In general terms, the Document describes the proposed Homeownership Development Program and overall financial format for the development.

The Document was submitted to HUD as of June 30th.

Homeownership Evidentiary Package – legal teams have started to assemble documents. First draft of the package is expected to be circulated by mid-July.

II SITE INVESTIGATION – EXISTING CONDITIONS – ENVIRONMENTAL ASSESSMENT

ALTA Survey:

Jordan, Jones and Goulding have completed a revised Site Survey drawing for the Wynnton Site. The drawing has been submitted to City of Columbus for review, approval and signature.

Environmental Assessment:

The Environmental Approval process for the Wynnton Site has not yet been initiated.

Site Drainage Study, Site Development and Infrastructure Design: this activity is critical for advancing the Wynnton Project.

An executed Intergovernmental Redevelopment Agreement pertaining to design and construction of Infrastructure is necessary before consultant procurement and design can commence.

The Developer has been requested to initiate consultant procurement for Site Development Design as soon as possible.

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III MASTER PLANNING

HACG has not yet provided final approval for an overall Peabody Masterplan. The current Plan must be revised to reflect required setback variances, parking variances, correct building types, footprints and revised building locations. Final revisions which will advance the process to the final Masterplan will commence with design meetings planned to start during the month of July.

The next phase of Master Planning activities include:

- revisions in response to financial model revisions
- revisions necessary for compliance with setback restrictions and variances.
- revisions necessary for compliance with parking requirements.
- revisions in response to proposed building design dimensions and final locations of new buildings on the site.
- preparation of the Amended Revitalization Plan for submission to HUD.

IV PEABODY DEMOLITION

Demolition Bid-Opening was completed March 16, 2004.

Initial Bid Results indicate that Pyramid Construction is the lowest responsive Bidder.

The Integral-Bianchi Construction Agreement is has been executed as of July 01, 2004. Integral has requested a Notice To Proceed be issued effective July 12. The Demolition Start-Up meeting is scheduled for July 09. The Contractor has started to assemble his required submittals and is currently scheduled to start mobilization on the job-site as of July 12.

V RESIDENT RELOCATION

Resident Population: As of July 07, the resident population at Peabody is 31 households.

Relocation Stats to date:

- 269 families total relocated to date
- 174 families relocated to date to other PH communities
- 88 families relocated to date to Section 8 housing
- 80 families to date relocated outside the scope of the Relocation Project due to other circumstances
- 183 families to date have expressed interest in returning to the new community

Revised Resident Relocation Schedule remains as follows:

- Phase 1 Relocation **complete as of February 13, 2004.**
- Phase 2 Relocation **complete as of June 16, 2004**
- Phase 3 Relocation scheduled to be complete by September 01, 2004

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VI COMMUNITY & SUPPORTIVE SERVICES

June activities included:

Health Fair event was not attended by Peabody Residents; youth event for children ages 6 -11 was not attended by Peabody resident children.

Pastoral Institute has initiated additional information submissions to 43 Peabody families who have not clarified whether they wish to take advantage of CSS opportunities.

Pastoral Institute has distributed information to former and current Peabody residents concerning the Neighborhood Networks Computer Classes, the Warren Williams Health Fair, assistance with resume writing and job searches.

Pastoral Institute has been successful in receiving a Grant Award for a Youth Advocate relative to the Safe and Drug Free Schools Program.

CSS stats to June 30:

- all resident assessments complete except for those residents who have refused services.
- 173 persons in employment preparation, placement to date.
- 43 persons in job skills training to date.
- 13 job placements this quarter
- 118 job placements total program to date
- 12 Peabody families enrolled in home ownership program to date

VII HOMEOWNERSHIP PROGRAM

According to recently revised HUD regulations, HUD does not require a Homeownership Plan submission. The Developer will use the Homeownership Plan Document to substantiate the Evidentiary Document submission in support of the Wynnton Closing process.

Homeownership counselling is ongoing. HACG and CHI will co-host an open house in mid-July, intended to promote homeownership opportunities for Peabody Residents and hopefully attract more Residents to the Program.

VIII WYNNTON PROJECT – CLOSING

In accordance with the HACG-HUD Grant Agreement; the Financial Proposal/Term Sheet for the Homeownership Project and development of the Wynnton Site, has been submitted to HUD as of June 30. The Locked Checkpoint Date for receipt of the Document at HUD is July 02.

Respective legal teams have commenced preparation of the Evidentiary Document package. Draft copy of required documents is expected by mid-July.

Completion of the Property Transfer Process with City of Columbus is critical to completion of Evidentiary Documents as is City approval of the revised site survey.

Closing is tentatively scheduled for September 01, 2004; the Locked Checkpoint Date is October 02, 2004.

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IX PEABODY PHASE 1 TAX CREDIT APPLICATION

The Tax Credit Application submission to DCA completed May 04, 2004.

Tax Credit Award notification is expected September 01.

X PROJECT RELATED MEETINGS – June 2004

June 10 Project Review Meeting – HACG, PMT, Integral
June 24 Project Review Meeting – HACG, PMT, Integral
June 28 Conference Call Meeting – Wynnton Evidentiary Submission Review – HACG, PMT, Integral, Legal Teams.

XI DOCUMENT SUBMISSIONS AND NOTICES – June 2004

June 02 Concept drawings for Homeownership units submitted to HACG by Integral
June 02 Preliminary plan layouts for Peabody Units submitted to HACG by Integral
June 04 Review Comments regarding Peabody Unit Layouts submitted to Integral by PMT
June 08 Notice of Demolition Bid Protest received by HACG from contractor attorney.
June 08 Contractor Demolition Schedule submitted to PMT by Integral
June 09 Memo regarding Demolition Bid Protest submitted to Integral by PMT
June 10 Proposed Procurement Process for professional consulting services submitted to HACG by Integral
June 14 Notice of milestone submission deadline received by HACG from HUD
June 15 Review Comments regarding Proposed Procurement Process submitted to Integral By PMT
June 16 Memo from Integral to Hecht Burdeshaw Kidd and Clark, dated June 8, regarding consulting services, submitted to HACG by Integral
June 16 Memo regarding completion of Phase 2 Relocation submitted to Integral by PMT
June 16 Legal Notice submitted to Integral by HACG
June 17 Preliminary Outline Specification for Peabody Construction submitted to HACG by Integral
June 18 Phase 1 Predevelopment Loan Invoice #2 submitted to PMT by Integral
June 18 Notice of demolition Bid Protest received by HACG from contractor attorney.
June 24 Demolition Bid Protest clarification submitted to Pyramid and HACG by Integral
June 24 Phase 1 Predevelopment Loan Invoice #2 submitted to HACG by PMT
June 24 Revised architectural layouts for Peabody Units submitted to HACG by Integral
June 24 Proposed consulting services RFQ submitted to HACG by Integral

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PROJECT FINANCIAL REVIEW

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June 2004:

As the project progresses, the PMT will monitor the overall project financial status through HACG Finance Department.

During the month of June, the Developer submitted Phase 1 Predevelopment Loan Invoice #2. The Program Management Team have reviewed the Invoice, requested additional supporting documentation and have submitted the Developer Invoice and Payment Summary to HACG as of June 24.

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PROGRESS PAYMENT SUMMARY PHASE 1 PREDEVELOPMENT LOAN AGREEMENT

DEVELOPER 3RD PARTY COSTS ----- Invoice #2 payment period ending February 29, 2004
pursuant to MDA and Predevelopment Loan Agreement: HACG payment for 75% of Developer Invoice

item	Total Budget	Developer Obligated Contract Amount	Developer Total Invoice To Date	Developer Invoice to 05-14-04	HACG Obligated Budget Amount 75%	Invoice Amount to HACG This Invoice	HACG Total Invoice to Date	HACG Paid to Date
Master Planning - Rees Design	\$ 30,000.00	Rees- hourly	\$ 8,730.00	\$ 2,270.00	\$ 22,500.00	\$ 1,702.50	\$ 6,547.50	\$ 4,845.00
Architect & Engineer	\$300,000.00		\$ 0.00	\$ 0.00	\$225,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Survey - JJG	\$ 35,000.00	JJG - \$26,000.00	\$ 21,294.28	\$ 21,294.28	\$ 26,250.00	\$ 0.00	\$ 15,970.71	\$ 15,970.71
Soil Testing	\$ 40,000.00		\$ 0.00	\$ 0.00	\$ 30,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Environmental	\$15,000.00		\$ 0.00	\$ 0.00	\$ 11,250.00	\$ 0.00	\$ 0.00	\$ 0.00
Market Study	\$ 8,000.00		\$ 3,750.00	\$ 3,750.00	\$ 6,000.00	\$ 2,812.50	\$ 2,812.50	\$ 0.00
Appraisal	\$ 8,500.00		\$ 0.00	\$ 0.00	\$ 6,375.00	\$ 0.00	\$ 0.00	\$ 0.00
Tax Credit Application Fee	\$ 32,000.00		\$ 0.00	\$ 0.00	\$ 24,000.00	\$ 0.00	\$ 0.00	\$ 0.00
Public Relations	\$ 10,000.00		\$ 0.00	\$ 0.00	\$ 7,500.00	\$ 0.00	\$ 0.00	\$ 0.00
Other Consultants	\$ 50,000.00		\$ 0.00	\$ 0.00	\$ 37,500.00	\$ 0.00	\$ 0.00	\$ 0.00
Sub-Total 3rd Party	\$528,500.00				\$396,375.00	\$ 4,515.00	\$ 25,330.71	\$ 20,815.71
HACG 3 rd Party Payments Not to Exceed					\$396,375.00			
Total 3 rd Party Invoice #2 for 3 rd Party						\$ 4,515.00		
Total 3 rd Party HACG Invoice to Date							\$ 25,330.71	
Total 3 rd Party HACG Paid to Date								\$ 20,815.71

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PROGRESS PAYMENT SUMMARY - NO CHANGE OF STATUS FOR MONTH OF May PHASE 1 PREDEVELOPMENT LOAN AGREEMENT

DEVELOPER ADVANCES FOR OVERHEAD MILSTONES- Invoice #1 for period ending February 29, 2004
pursuant to MDA and Predevelopment Loan Agreement: HACG payment for 100% of Developer Invoice

Item	Budget	Percent % complete to 05-14-04	Developer Total Invoice to Date	Developer Amount this Invoice	Invoice Amount to HACG this Invoice	HACG Total Invoice to Date	HACG Total Paid to Date
MDA Executed	\$ 30,000.00	100%	\$30,000.00	\$ 0.00	\$ 0.00	\$30,000.00	\$30,000.00
Predevelopment Consultant Procurement	\$ 30,000.00	40%	\$ 11,100.00	\$ 2,100.00	\$ 2,100.00	\$ 11,100.00	\$ 9,000.00
Stakeholder/Community Meetings	\$ 15,000.00	85%	\$ 12,000.00	\$ 0.00	\$ 0.00	\$ 12,000.00	\$ 12,000.00
Masterplan	\$ 30,000.00	85%	\$ 27,150.00	\$ 150.00	\$ 150.00	\$ 27,150.00	\$ 27,000.00
Design Schematic Approval	\$ 15,000.00	5%	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Design Development Approval	\$ 15,000.00	5%	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Tax Credit Application	\$ 45,000.00	100%	\$ 45,000.00	\$ 45,000.00	\$ 45,000.00	\$ 45,000.00	\$ 0.00
Tax Credit Award & Start Closing Documents	\$ 30,000.00	10%	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Mixed Finance Proposal	\$ 30,000.00	10%	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Evidentiary Documents	\$ 60,000.00	20%	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Subtotal	\$300,000.00		\$95,250.00	\$47,250.00	\$47,250.00	\$125,250.00	\$78,000.00
HACG Payment for Developer Overhead not to Exceed	\$300,000.00						
Total Amount Invoice #2 for Developer Overhead					\$47,250.00		
Total Developer Overhead Invoice to Date to HACG						\$125,250.00	
Total Developer Overhead Paid to Date by HACG							\$78,000.00

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PROJECT SCHEDULE REVIEW

SECTION 1 STATUS REPORTS

Relocation

June 2004

Phase 1 complete

Phase 2 complete – on schedule

Phase 3 Relocation scheduled for completion Sept 01, 2004 – 12 weeks ahead of schedule

CSS Program

June 2004

Case management is ongoing. Outreach is ongoing. Pastoral Institute is accomplishing and exceeding prescribed goals.

Homeownership Counseling

June 2004

CHI Home Ownership Program is ongoing -12 Peabody families enrolled in program to date.

Administrative Issues

June 2004

Master Developer Agreement – Second Amendment pending subject to Architectural Services Procurement.

Wynnton Site Property Transfer – in process with City Legal. Completion is critical for Wynnton Closing.

Intergovernmental Agreement – Executed Document is behind schedule and is impacting implementation of infrastructure design.

Infrastructure for Wynnton Development

June 2004

Infrastructure Design is required as soon as possible. Developer is unable to initiate consultant procurement until Intergovernmental Agreement has been executed.

Site Development for Wynnton Properties

June 2004

Site Development design is required as soon as possible to prep sites for home construction intended to start in September. Consultant procurement and design is currently behind schedule.

Peabody Demolition

June 2004

Contractor mobilization and Demolition Start planned for mid-July; the MDA Schedule notes a July 02 start date.

Wynnton Closing

June 2004

Financial Proposal/Term Sheet submitted to HUD on schedule. Evidentiary Documents tentatively scheduled for submission to HUD by August 01 and Closing process to be complete September 01. Construction start expected in October.

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SECTION 2 OUTSTANDING ISSUES

Key Project Issues

- Wynnton Property Transfer
- Wynnton Evidentiary Documents – completion and submission to HUD
- Wynnton Closing
- Consultant Procurement for Wynnton Site Development
- Site Development Design and Construction for Wynnton parcels.
- HACG-Integral Infrastructure Construction Services Agreement
- Intergovernmental Agreement signatures
- Peabody start Demolition
- Resident Relocation
- Consultant Procurement for Infrastructure Projects
- Infrastructure design for Wynnton Site
- Infrastructure construction for Wynnton Site
- Infrastructure design for Peabody Site
- Consultant Procurement for Peabody Architectural Design
- CSS Program Case Management
- Section 3

PMT Project Look Ahead

- Demolition at Peabody Site
- Closing for Wynnton Project
- Resident Relocation
- Wynnton Site Development
- Infrastructure Design
- Consultant Procurements
- Peabody Design Development
- CSS Case Management
- Homeownership counseling
- Track schedule
- Track Project Budget
- Monitor Relocation, CSS, Homeownership

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SECTION 3 ENCLOSURES

- SUMMARY SCHEDULE updated to June 30, 2004
- Relocation Schedule updated to June 30, 2004
- Demolition Schedule updated to June 30, 2004
- 90-DAY WORK IN PROGRESS SCHEDULE
July – August - September 2004