

REVIEW OF MARKETING TRANSITION PLANS ON PRESERVATION PROPOSALS

INTENT AND PURPOSE

The intent and purpose of a Marketing Transition Plan (MTP) is to identify a process between the owner, management agent and contractor that will be followed in an occupied building during physical rehabilitation of the building. It may also include specific efforts and processes to be used by the management agent for retaining existing residents, marketing and leasing of vacant units.

This plan is essential in helping to minimize disruption to tenants and development operations, retain existing residents, market vacant units and identify various responsibilities during the rehabilitation process.

MTP CRITERIA AND CONTENT

The MTP will vary in content depending on the scope of work, type of building, if residents are elderly or family and other development specific items. All tenant relocation expenses and special development operating costs associated with the rehabilitation are to be included in the cost of the rehabilitation. Neither residents nor development operations are to pay for related costs of packing and moving items in the units, temporary relocation of the tenant if they are displaced from their unit during rehabilitation, cost of meals when their unit is unavailable to them, etc.

It would be acceptable if a resident prefers and can personally or with help of family, pack items in boxes provided by the contractor for storage while rehabilitation is taking place. In situations where the resident can not, or will not or in elderly households where the resident would be burdened, the contractor is ultimately responsible for providing staff and materials to pack and relocate needed household goods. Recognize this can be a significant task if the units are receiving new kitchen cabinets, appliances, floor coverings, painting, bath vanities, etc.

Specific items to look for in proposed MTPs:

- Communication. Process of notification and regular communication to residents during rehab and what is going to take place needs to be established. (Very Important!)
- Appropriate notification and direction to residents must take place if rehabilitation will make security, emergency or fire systems inoperable.
- Identification of specific tenants who may have special needs during the rehabilitation should be made and accounted for.
- Must designate contact persons with the management agent and contractor who need to be available in case of emergency or a serious event.
- Designated areas of the parking lots or site that can be used by the contractor for storage of materials, office trailers and worker parking must be identified. Sufficient resident parking near the building(s) must remain available and identified.
- Reimbursement to the development for use of utilities (gas, electric and water) is to be addressed.

- If an elevatored building exists, a plan should be developed noting specific times construction workers can use the elevator(s) for moving materials and waste. Unrestricted use of an elevator by residents and coordination of elevator use if only one exists, is important. If an elevator is to be made inoperable due to repair or replacement, sufficient notification and accommodations must be made for the residents.
- When tenants are displaced from their units for 4 hours or more, provisions for providing a meal must be made. If their unit is not available for them to make a lunch or dinner, an appropriate meal shall be available to them. (Donuts and coffee is not sufficient.)
- If rehabilitation requires the resident to be out of their unit over night, appropriate accommodations must be provided. Related expenses will be paid for by the contractor.

In summary, the contractor is ultimately responsible for packing, moving and storage of tenant items in the units that have to be moved because of the rehab. This includes wall hangings, furniture and all general household items. To the extent a tenant is willing and able to pack their own stuff, that is acceptable. To the extent that does not occur the contractor is responsible for providing needed staff and funding to accomplish the task. The contractor is also responsible for related displacement expenses of the tenant if caused by the rehabilitation. Development 'operations' is not to absorb these expenses.

Once approved by the Authority, the MTP is to be dated and signed by the owner, management agent and contractor and made part of the closing.

8-15-07

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