

# DEMYSTIFYING OCCUPIED REHABS

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# Overview

- Introductions
- What Is Occupied Rehab?
- Developer/Owner Perspective
- Owner's Rep Perspective
- Contractor Perspective
- Architecture Perspective

# What is Occupied Rehab?

PHFA “Preservation Developments” : *Existing affordable housing stock that has come to a point in its life where it is in need of moderate or substantial renovation or is in danger of converting to market-rate housing.*

Existing residents are moving back into their units

# Developer/Owner Perspective

# Pre-Development Consideration

- Who is at the table
- Anticipated Financial Impact on the property
- Before Construction
- Reassignment of HAP/Subsidy funding
- During Construction

# Preparation and Strategy

- Determining that the project is achievable occupied
- Strategies-(Temporary Move/ Units unavailable during specific times/Permanently relocating
- Tenant Implications
- Upsize/Downsize
- Special Accommodations
- Communication Plan
- Vacant Unit count-When Do you leave units vacant in anticipation of the start of construction
- Unit turnover schedule
- Common Area / Major system schedule

# Implementation

- Kick-off meeting
- Internal Team
- External Hire Team
- Supplies
- Communication meetings
- Communication of delays
- Unit turnover/closeout
- Punch List Schedule



# Owner's Rep Perspective

# Relocation Plan

- ❖ Introduction
- ❖ Responsibilities of Participants
- ❖ Relocation Program-Basic Actions
- ❖ Acceptance/Rejection Criteria
- ❖ Tenant Notification
- ❖ Interview to Determine Relocation Needs
- ❖ Relocation Benefits and Assistance
- ❖ Relocation Correspondence and Recordkeeping
- ❖ The Relocation Fund
- ❖ Relocation Program Timetable
- ❖ Amending the Relocation Plan

# Relocation Cont'd

- 90-day resident General Information notice by certified mail with return receipt or by hand.
- Resident Meetings / Information Sessions
- Open dialogue concerning logistics of renovation and relocation and resident rights and responsibilities.
- Personal Interviews / intake forms to assess relocation needs, medical eval, emergency contacts, etc.....

Provide information packet. Document and place in resident file.

- Coordinate with general contractors, movers, and owners to establish onsite renovation plan and timetable.

Identify households with special needs and reserve vacant units to tend to households with special needs

# Relocation Cont'd

- ❖ Plan onsite accommodation and meals for residents in units that are being renovated.
- ❖ 30-day resident notice by certified mail or by hand.
- ❖ Unit inspections. Ensure the planned furniture movement is coordinated by a professional firm and that phased units are prepared to begin work.
- ❖ Inspect, clean, and disinfect each unit every day prior to the resident's evening return. This is a coordinated effort by the site project manager and cleaning company.
- ❖ The project manager reports completed units to owner/resident services, Movers restore furniture and belongings, and the coordinator and resident do a final inspection.

# Contractor Perspective

# What Is Renovate-in Place?

- Resident vacates the apartment each morning and returns in the evening.
- Community Room serves as Hospitality Space – Meals & Activities
- Toilet and sink are serviceable each night
- Typical unit renovations require 5-6 days
- Works best for Senior Apartments
- Extensively Phased Construction Activities

# Scheduling

## *Typical Units*

- Most projects require 5-6 days per unit
- Optimal to Work in 3 Units each Day
- Determine how much work can be finished each day :
- Determine how many workers from of each trade are r
- Lead time for materials? Start Work once all materials
- Need space on site for storage trailers

## *ADA Units*

- These require extra time – 2-3 weeks each, typically
- Tenants often need to vacate these units
- Will residents move to a hotel or vacant swing unit?

## *Common Areas*

- Investigate the lead time for Windows.
- What type of roof replacement? Might be weather-sensitive.
- Masonry Restoration and caulking is weather-sensitive.
- Depending on the time of year and lead times, may start this work before, during, or after unit work

## Day 1

- Temp protection
- Demo and install new Windows
- Cut and patch drywall around window
- Spackle drywall @ windows
- Demo (3) kitchen cabinets
- Demo & Reinstall Wall partitions (kitchen)
- Spackle new drywall partitions

# Common Challenges & Solutions

## *Scheduling*

Complex schedule – Good Communication Essential!

- Come back work: HVAC Units, Windows, Sprinklers – Alert residents
- Lead times – must allow 4 months after closing before starting units
- Working around Holidays
- Sick Tenants – Schedule must be flexible
- Post schedules in elevators
- Work from Top Down

	Demo Start	Units Complete	Unit Numbers
Group 1	3/7/2024	3/13/2024	650, 651, 652
Group 2	3/8/2024	3/14/2024	653, 654, 655
Group 3	3/11/2024	3/15/2024	656 (H/V), 657, 659
Group 4	3/12/2024	3/18/2024	661, 662, 663
Group 5	3/13/2024	3/19/2024	664, 665, 666
Group 6	3/14/2024	3/20/2024	667, 668, 669

## *Scope*

- Avoid new drywall & relocation of electric and plumbing services where possible
- Flooring Removal (or not) – Sometimes it is easier to go over the top
- Working Out Problems in Advance – Mock-up Room



# Common Challenges & Solutions

## *Logistics*

- Establish who moves Furniture and Small Personal Items & where does it go?
- Tenants who are too frail to go to the Community Room – have a plan for them
- Punch Listing Units – Post checklist to the back of unit doors
- Certificate of Occupancy (there won't be one)

## *Environmental Issues*

- Bed Bugs – may need to skip over for treatment
- Mold – Consult with the safety director and property management.
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Asbestos – Have a report done. Avoid disturbing if present.



# Architecture/Design Perspective

# CASE STUDY 1: Light Intervention

Existing Buildings: 69 Scattered Site Properties

Deliverables: Field reports + Cost estimates

Design Team: Architect, CM, Structure (as needed)

Funding Sources: PHARE

Budget: \$3 MIL

# CASE STUDY 1:

## Survey Logistics:

- Scattered among Philadelphia, Montgomery Co, + Delaware Co.
- Tenant Availability
- Squatters



# CASE STUDY 1:

## Key Design Issues:

- Minor Repairs + Finishes
- Structural
- Outdated Equipment
- Deferred Maintenance



# CASE STUDY 2: Moderate Intervention

Existing Buildings: 15 Scattered Group Living Properties

Deliverables: Field reports, Building Permits, CD's

Design Team: Architect, MEP, Civil, CM, Structure (as needed)

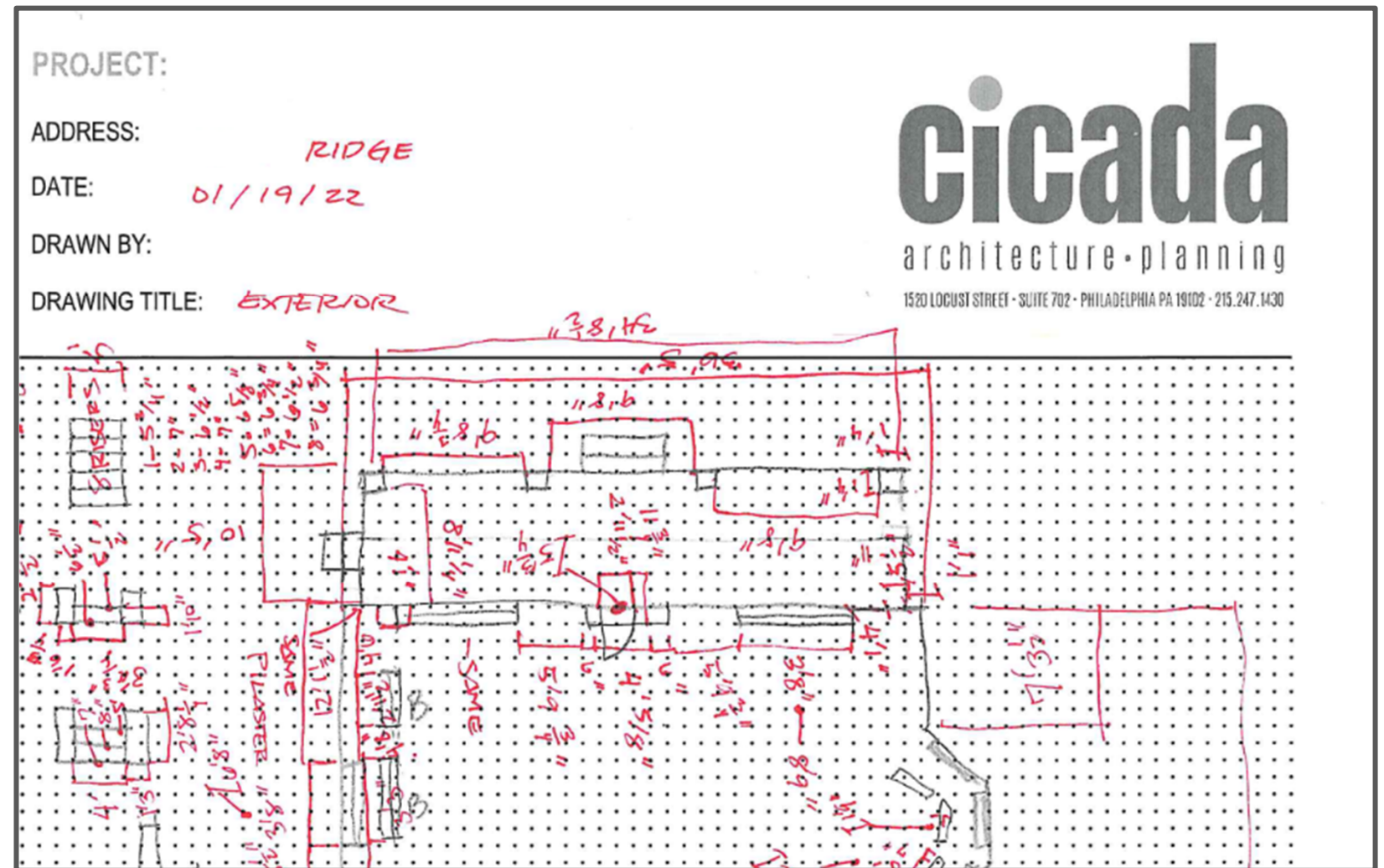
Funding Sources: PHARE, PHDC, FHLB

Budget: \$5 Mil

# CASE STUDY 2:

## Survey Logistics:

- Group homes
- Covid
- Spread across Philadelphia
- Existing records
- Measured drawings



Site	Location	Material	Condition	Notes
Ingress/Egress	3 ext door	None @ grade		
Paving	concrete walk	stone pavers	poor - all gravel	
Railings	Metal	peeling paint		
Landscape				garage poor condition
Building Envelope	Location	Material	Condition	Notes
Cladding	Stone, masonry		some areas of spalled ply	
	Drill		spalled ply	
Pointing			cracking @ party wall protrusion	
Basement/Foundations				

# CASE STUDY 2:

## Key Design Issues:

- Accessibility Concerns
- Aging in Place
- Structural repairs
- Historic Review
- Previous Renovations
- Interior finishes





# CASE STUDY 3: High Intervention

Existing Building: 1 Multi-family High Rise

Deliverables: CNA, Application materials, Building Permits, CD's

Design Team: Architect, MEP, Civil, CM, Structure (as needed), Energy Modeler, Historic Consultant

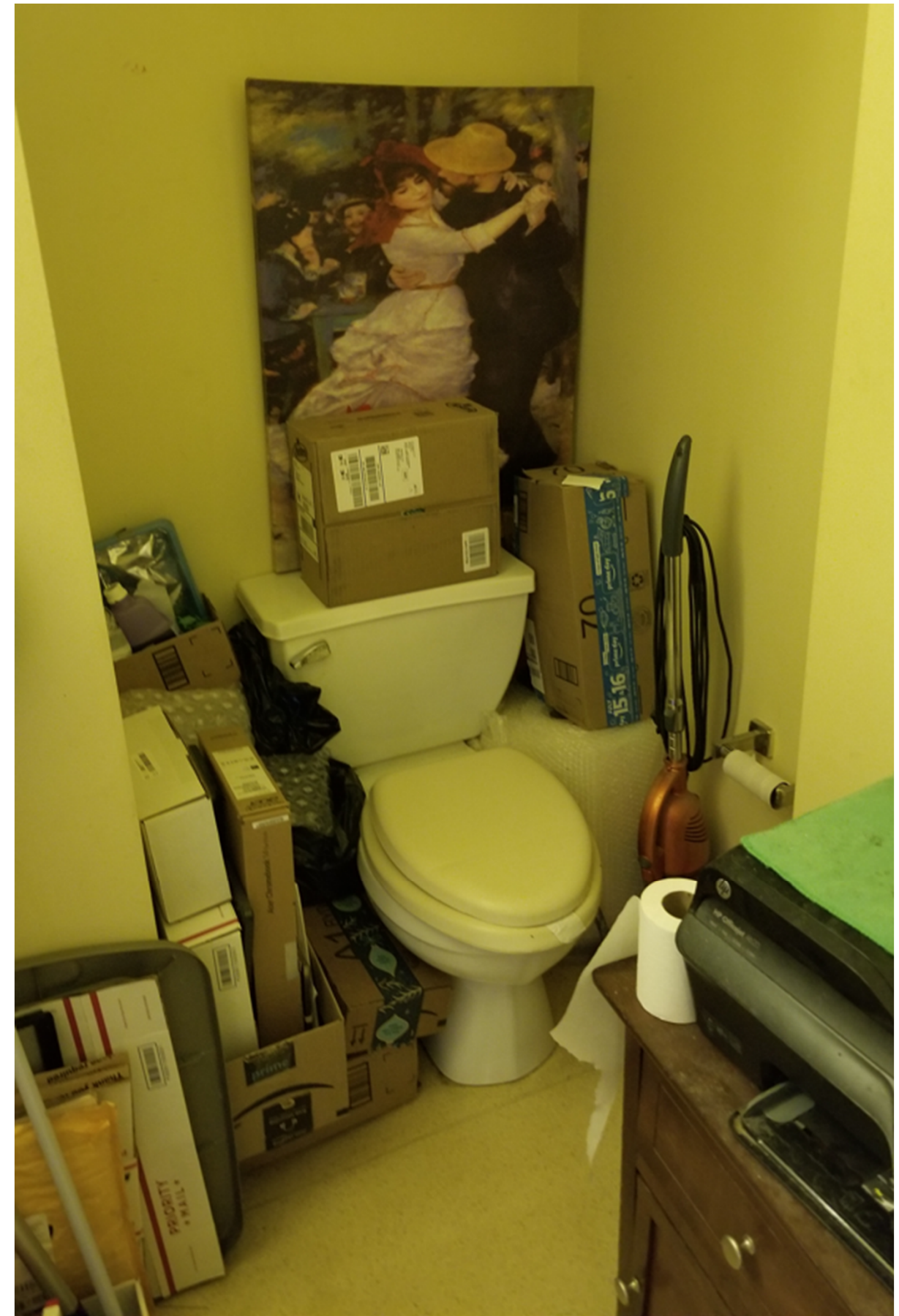
Funding Sources: LIHTC, PHARE, PHDC, FHLB

Budget: 12 Mil

# CASE STUDY 3:

## Survey Logistics:

- Scale - interior + exterior
- Stuff
- Existing drawings



# CASE STUDY 3:

## Key Design Issues:

- Envelope upgrades
- Accessibility upgrades
- Historic Review
- PHFA Requirements