

Nov 08 2024

STATE HEALTH PLANNING AND
DEVELOPMENT AGENCY

H O L D E N

283 Shades Crest Road
BIRMINGHAM, AL 35226

205.527.0382

November 6, 2024

VIA Electronic Filing
shpda.online@shpda.alabama.govHon. Emily Marsal
Executive Director
State Health Planning and Development Agency
100 North Union Street
Suite 870
Montgomery, Alabama 36104RE: Request for Reviewability Determination
Proveer at Heritage Woods Specialty Care Assisted Living Facility (SCALF)
CON 2114-SCALF
ADPH Facility ID: P4911

Dear Ms. Marsal:

This request is on behalf of Proveer at Heritage Woods Specialty Care Assisted Living Facility (SCALF) which is licensed for 23 SCALF beds operating on a campus that also is licensed for 89 Congregate Assisted Living beds. Proveer Heritage Woods Specialty Care Assisted Living (SCALF) serves Mobile and contiguous counties.

The proposed modifications to the building include extending the SCALF perimeter in order to convert five existing Regular ALF units into single occupancy SCALF units. This will allow the existing double occupancy SCALF units to become private units.

The proposed changes do not add any SCALF beds, does not change any service (except reducing the Regular ALF beds), and does not exceed current CON expenditure thresholds specified in Section 410-1-2-.07 of the Regulations for equipment, annual operating costs, or total capital expenditure.

Since the overall occupancy of the SCALF will not change there is no need to increase staffing, ancillary services, or resident care expenditures. No new equipment will be required. There will be modification to the interior walls including relocating the existing secure magnetic locking access doors separating the SCALF units from the Regular ALF units.

Pursuant to Section 410-1-7-.02 of the Alabama Certificate of Need Program Rules and Regulations we request a determination by the Agency that Proveer at Heritage Woods Specialty Care Assisted Living

Facility (SCALF) located in Mobile County Alabama does not require a CON for the herein described modifications to the facility.

The licensed operator is Proveer Senior Living, LLC. The project is financed through its financial partner Trinity Proveer Holding II, LLC. Proveer Senior Living, LLC operates in two states including three senior living campuses in Alabama; Proveer at Byrd Springs, Proveer at Port City, and Proveer at Heritage Woods Specialty Care Assisted Living facility.

1. Proveer at Heritage Woods Specialty Care Assisted Living Facility is the operator seeking the determination.
2. Contact Information:

Proveer at Heritage Woods Specialty Care Assisted Living Facility
Crystal Bodin, Administrator
3440 Hillcrest Road
Mobile, AL 36693
251-665-9063
cbodin@proveersl.com

Holden, LLC
Frank Holden, Consultant
283 Shades Crest Road
Birmingham, AL 35226
205-746-7675
ikonzandrelix@gmail.com

3. The Medical Service Area is Mobile and contiguous counties.
4. The proposed modifications to the building include extending the SCALF perimeter in order to convert existing Regular ALF units into single occupancy SCALF units. This will allow the existing double occupancy SCALF units to become private units. The project will not add any new service nor any new SCALF beds.
5. The approximate costs for the proposed changes are:

Total Major Equipment Costs:	\$	0.00
Total New Annual Operating Costs:	\$	0.00
Total Capital Expenditures:	\$	362,661.00

6. Disclosure of financial interest:

Trinity Proveer Holding II, LLC
2102 E State Highway 114, Suite 300, Southlake, Texas 76092
Trinity Proveer Holding II, LLC owns 100% of the Heritage Woods property.

The members of the Holding Company are:
90% Trinity Proveer SL Investors II, LLC
10% Proveer AL Investments II, LLC

7. Attestation by Crystal Bodin, Administrator attached.

The filing fee of \$1,000 is submitted through the SHPDA payment portal concurrent with the filing of this request for Reviewability Determination.

Respectfully, we request the Agency's determination that Proveer at Heritage Woods Specialty Care Assisted Living Facility is not required to obtain a CON in order to make these proposed changes to the existing facility.

Please contact me if there are any questions regarding this request.

Cordially,

A handwritten signature in black ink, appearing to read "Frank Holden".

Frank Holden, Consultant
Holden, LLC
283 Shades Crest Road
Birmingham, Alabama 35226

205-746-7675
ikonzandrelix@gmail.com

Attachment: Affidavit

cc: Matthew Thornton mthornton@proveersl.com
Dayton Wheeler dayton@trinityinvestors.com
Crystal Bodin, Administrator cbodin@proveersl.com



STATE HEALTH PLANNING AND DEVELOPMENT AGENCY

100 NORTH UNION STREET, SUITE 870
MONTGOMERY, ALABAMA 36104

FACTUAL INFORMATION REQUIRED FOR REVIEWABILITY DETERMINATION REQUESTS (SHPDA Rule 410-1-7-.02)

Any person may request for informational purposes only a determination as to the current reviewability of an anticipated project or determination of exemption for replacement equipment. Such request shall be submitted pursuant to the electronic filing requirements of SHPDA Rule 410-1-3-.09, disclosing full factual information, as more specifically identified below, and supplemented by any additional information or documentation which the Executive Director may deem necessary. SHPDA Rule 410-1-7-.02(1).

The following information must be included in all requests for reviewability determinations other than requests made pursuant to the Physician's Office Exemption (POE) or regarding End Stage Renal Disease (ESRD) stations, which must provide unique information specific to those providers:

1. Name of company seeking the reviewability determination.
2. Address and contact information for the authorized company representative seeking the determination.
3. Service area for the proposed service/equipment.
4. Any new/additional services to be provided under the proposed project.
5. Approximated costs of the proposed project for:
 - a. Equipment
 - b. First year annual operating costs
 - c. Capital costs, to include:
 - i. Leases
 - ii. Land/Building costs
 - iii. Construction costs
6. Disclosure of financial interests in the entity requesting the reviewability determination held by any other healthcare facilities or groups.
7. Attestation by an officer, partner or authorized agent of the company having knowledge of the facts disclosed in the reviewability request, utilizing the following form:

Affirmation of Requesting Party:

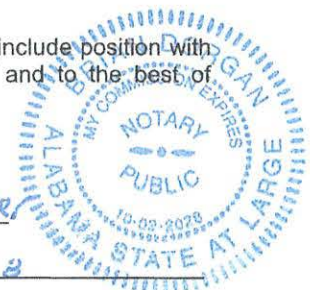
The undersigned, being first duly sworn, hereby make oath or affirm that he/she is [include position with entity requesting the determination], has knowledge of the facts in this request, and to the best of his/her/their information, knowledge and belief, such facts are true and correct.

Affiant Cynthia Bodin (SEAL)

SUBSCRIBED AND SWORN to before me this 1 day of November

TS
Notary Public

My commission expires 10/02/2028



Each determination must be accompanied by a \$1,000 filing fee submitted in accordance with SHPDA Rule 410-1-3-.09, Electronic Filing. Once deemed complete, notice of the request shall be published on the Agency's website for thirty (30) business days, and additional notice of the request shall be provided to the general distribution list maintained by the Agency. Any affected person may file comments with the Agency pursuant to SHPDA Rule 410-1-3-.09 regarding the issuance of the requested letter of non-reviewability. The Executive Director may provide a response to the request within forty-five (45) days of the request, unless additional time is needed to obtain additional information or to evaluate comments filed in opposition of the request.

Nov 21 2024

STATE HEALTH PLANNING AND
DEVELOPMENT AGENCY

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283 Shades Crest Road
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205.746.7675

November 21, 2024

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shpda.online@shpda.alabama.govHon. Emily Marsal
Executive Director
State Health Planning and Development Agency
100 North Union Street
Suite 870
Montgomery, Alabama 36104RE: Request for Reviewability Determination
Proveer at Heritage Woods Specialty Care Assisted Living Facility (SCALF)
CON 2114-SCALF
ADPH Facility ID: P4911
RV2025-009
SHPDA ID: 097-S4911

Dear Ms. Marsal:

This letter is in response to your request for clarification of our Request for Reviewability Determination on this project.

The proposed modifications to the building include extending the SCALF perimeter in order to convert five existing Regular ALF units into single occupancy SCALF units. This will allow the existing double occupancy SCALF units to become private units. The total square footage to be converted is approximately 1,550 square feet.

“Units” refers to beds.

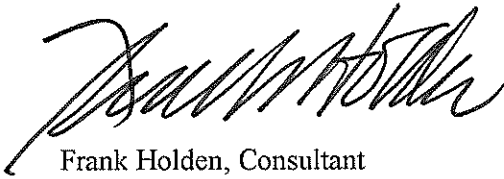
The estimated annual operating costs after the conversion of five ALF beds to SCALF is \$2,877,258, the current annual operating expenses are \$2,805,920. The conversion project will result in an annual increase of approximately \$71,338 in estimated annual operating expenses.

The contractor’s bid sheet is attached. It describes the planned modifications in detail.

Page 2 of 2

Please contact me if there are any questions regarding this request.

Cordially,

A handwritten signature in black ink, appearing to read 'Frank Holden', with a stylized, cursive script.

Frank Holden, Consultant
Holden, LLC
283 Shades Crest Road
Birmingham, Alabama 35226

205-746-7675
ikonzandrelix@gmail.com

Attachment: B&B Quality Construction, Inc. Bid Proposal

cc: Matthew Thornton mthornton@proveersl.com
Dayton Wheeler dayton@trinityinvestors.com
Crystal Bodin, Administrator cbodin@proveersl.com

B&B Quality Construction, Inc.

324 Argo Park Court, Trussville, Alabama 35173

P.O. Box 230, Springville, Alabama 35146

Phone Number (205) - 467-2928

March 26, 2024

Tim Barron
Tim Barron Architect, Inc.
212 Eden View Drive
Hoover, Al 35244

Subject: Budget Proposal for Heritage Woods Assisted Living Facility in Mobile

Dear Tim,

Since I do not have existing drawings indicating how the electrical, plumbing or mechanical was installed or where and how the plumbing drain lines and water lines were run, I have put this Budget together based on some assumptions of how the existing building may have been constructed based on the age and floor plan of the building. I have tried to put this Budget together on the higher side so that it will help with any unexpected construction that may be encountered. I have also put this Budget together based on an assumption of how the work will need to be phased during construction based on this work being performed during normal workdays and times while it is partially occupied. Since I have had little time to price items such as flooring, new light fixtures, plumbing fixtures, kitchen appliances, new cabinets, countertop details, Electrical, Mechanical or Plumbing Engineered Drawings I am unable to include a Budget number for these items. This Budget does not include Air Scrubbers that are used in hospitals during construction but could be figured in if requested.

We propose to furnish the necessary material, labor, and equipment to complete the scope of work as discussed as being similar to the Proveer building located in Grayson Valley in Birmingham, Alabama and as outlined below for the Budget sum of \$362,661.00

Included in this Budget Proposal are the following items:

- General Liability Insurance
- Workman's Comp Insurance
- Construction Permit
- Job Site Superintendent / Project Coordinator
- Storage container for construction material and tools
- Dumpster for trash
- Temporary Toilet during construction
- Protection for the existing finishes
- Temporary dust partitions and controls during construction
- Demo of the existing screen, framing, door, and frame at existing porch

- Demo existing window and wall below for new exterior door unit (2) locations.
- Demo of existing 9' walls approximately 320 LF
- Demo of existing doors and frames approximately 32 units (may could reuse some of these door units for new locations).
- Demo existing cabinets and countertops as indicated.
- Demo existing P-Tac Units (1) each.
- Demo the (1) existing folding partitions dividing the rooms.
- Demo existing closet shelving.
- Demo existing pantry shelving.
- Demo existing shower units in the living units.
- Demo existing plumbing fixtures as indicated.
- Demo existing drywall ceilings at locations where walls were removed.
- Relocate existing lockers to the other side of the room.
- Remove existing refrigerator and turn it over to the owner.
- Remove existing cook top and turn over to the owner.
- Saw cut existing concrete floors for new plumbing locations (Allowance item) This has been figured using a hydraulic saw and vac system to cut down on dust and noise.
- Patch back drywall ceiling that was removed.
- Patch drywall were walls and cabinets were removed.
- Patch fire walls on new walls and construction areas only.
- Patch floors at the removed existing shower units.
- Patch floors at removed plumbing fixtures.
- Patch floors back after the new plumbing is installed.
- Patch exterior walls at new door locations.
- Patch exterior walls were the P-Tac Units were removed.
- Frame new walls with metal studs as indicated on the drawings approximately 460 LF.
- Install wood blocking in the existing wall where a new rated frame is to be installed.
- Install wood blocking for new hollow metal frames.
- Install new hollow metal door frames (16) each.
- Install new paint grade wood doors (16) each.
- Install new door hardware for the above noted doors.
- Install new hollow metal fire rated double acting frame in hall.
- Relocate existing hollow metal doors in hall to new frame.
- Install new door hardware for relocated rated hall doors (Allowance item)
- Install new exterior hollow metal door frames (1) each.
- Install new exterior hollow metal doors with half glass (1) each.
- Install new exterior grade door hardware for new doors (1) each.
- Install new wood base to match as close as possible to the existing.
- Install new door casing on (16) new door units to match as close as possible to the existing casing on door entering the rooms.
- Paint existing hall walls, trim, doors, and casing hall side only, the existing drywall ceilings, and walls and ceilings in the new Handicap Units. This is an Allowance item.
- Remove electrical switches, lights, and wall plugs from the demoed walls. This is an Allowance item.

- Install (7) ADA Shower Units in indicated rooms, includes shower cost based on Grayson Valley.

Excluded from the Budget are the following items:

- Anything outside of the scope of work listed above.
- Any unexpected or unforeseen construction they may be encountered.
- Any Sewer Impact fees. Credits should offset any charges.
- Any work on the exterior of the building other than at the new exterior door locations and the removed P-Tac Units
- Any work in the Courtyard
- Any concrete work
- Any asphalt paving.
- Any Landscaping
- Any plumbing fixtures, need specs.
- Any electrical fixtures, need specs.
- Any work to the existing HVAC systems.
- Any work to the existing sprinkler system
- Any work to the existing alarm system
- Any work to the existing security or camera systems
- Any additional crash railing for the corridor walls. I will need more information on this item as the price can differ based on the style.
- Any work to or in any of the existing units other than the shower units to be replaced in the ones listed as new Handicap Units (7) each.
- Any work to existing walls to make fire rated other than around new walls.

Owner supplied items:

- Drawings for Permitting
- Building Insurance
- Builder Risk Insurance during the renovation
- Any Sewer Impact Fees that may be applied. Credits should offset any charges.
- Access to the work area
- Location near exterior doors to place a dumpster.
- Location for a job site storage trailer
- Location for a Temporary Toilet
- Specs on the flooring, special door hardware, handicap shower units, plumbing fixtures. electrical fixtures, cabinet material and countertops.
- Specs for the kitchen appliances
- Use of Owners power
- Use of Owners water
- Any furniture tables, chairs, appliances, etc.

Sincerely,

Kevin Blackwell
B&B Quality Construction, Inc.

Nov 25 2024

STATE HEALTH PLANNING AND
DEVELOPMENT AGENCY

H O L D E N

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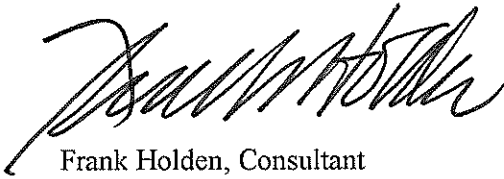
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