

Atrium / Wexford Innovation District (The Pearl)

Project Status Report

Updates Submitted - 3/3/2025

Key: Source /Reference - Executed Agreement (EA), Board Presentation/11.9.21 (BP), Community Benefits PDF (CB)

Item	Initiative	Commitment	Source/Reference (EA, BP, CB)	Measure/Quantity	Detail	Status	Update
Design and Construction (Buildings)							
1	Purposeful Walk and Jacob Ladder community open space	Up to 15,000 square foot cascading outdoor plaza located in the core of the innovation district and at the base of the Medical Education Building and Research Building 1	EA, CB	N/A	Jacob's Ladder being a homage to historic Myer's Street School within Brooklyn Village neighborhood as a gathering and communal space and as a sense of destination for the Purposeful Walk and to include murals and/or art installations and to be influenced by the history of the community	Underway Early	Purposeful Walk Dedication will be held in early June, an event open to the community that celebrates the launch of the Purposeful Walk. Purposeful Walk Steering Committee, made up of community leaders & historians, was assembled in 2022 and has met roughly 10 times over 18 months to brainstorm, envision and formalize the Purposeful Walk concept with the architecture & design team. The team is currently in the storytelling phase of the project, working in partnership with the Gantt Center, to identify, record and share the stories of the Brooklyn Community to incorporate into the outdoor, living museum experience.
2	Purposeful Walk and Jacob Ladder community open space	Provide public access easements for Purposeful Walk/Jacob's Ladder community open space features to ensure community use and benefits	EA, CB	N/A		Planning Phase	
3	Design and Construct other Public Improvements	Including numerous new public streets and public street extensions improving nearby transportation network, streetscape and sidewalks/planting strips and street trees, public sewer/water infrastructure benefitting the district and broader community, transmission line relocations, parking improvements supporting public parking, among other infrastructure improvements.	EA, CB	N/A		Underway Near Complete	
4	Design and Construct other Public Improvements	Infrastructure progress included completion of the Duke Distribution duct bank, completion of the crane erection, and completion of Manhole 300.	EA, CB	N/A		Complete	
5	Design and Construct other Public Improvements	Start to precast for Parking Deck A and receiving the Parking Deck B Grading Permit	EA, CB	N/A		Underway Near Complete	
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MWSBE Participation							
6	MWSBE Participation Goals	Increase the utilization of Small Business Enterprises, Minority Business Enterprises and Women Business Enterprises with project goals associated with target work.	EA, CB	MBE is 6%, SBE is 14% and WBE is 0%.		Underway Midway	As 1/16/2025 <u>Awarded COW</u> \$18.21M (20.10%) MBE \$7.27M (8.03%) SBE \$12.44M (13.73%) WBE <u>Paid-to-Date COW</u> \$12.06M (19.11%) MBE \$ 5.29M (8.38%) SBE \$ 9.94M (15.75%) WBE

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7	MWSBE Participation Plan Reporting	Provide quarterly reports as noted in Detail			<p>List of all Target Contracts that are ongoing at any point during the quarter; Actual dollar amount committed to MBEs, SBEs, or WBEs on each Target Contract (and totaled for all Target Contracts, including the name of each MWSBE, Actual dollar amount actually paid to MBEs, SBEs, or WBEs on each Target Contract (and totaled for all Target Contracts), including the name of each MWSBE; Total dollar amount paid out on each Target Contract (and totaled for all Target Work);</p> <p>Percentage utilization achieved to date, calculated by dividing the amounts paid to MWSBEs on all Target Contracts to date by the total amount paid for Target Work to date (calculated separately for each type of MWSBE and in the aggregate); List of all contracts that are ongoing at any point that are not Target Contracts; and List of all contracts and Target Contracts that Developer expects to put out for bids or proposals during the two (2) upcoming quarters, if any.</p>	Underway Midway	See Supplemental Handout by Atrium
8	Contract Goal Setting - Contracts \$200,000+	At least fifteen (15) days prior to soliciting bids or proposals for any Target Contract anticipated to have a contract price greater than \$200,000, Construction Manager will propose in writing Contract Goals for the applicable Target Contract, which proposal shall be subject to approval by the City (not to be unreasonably withheld, conditioned or delayed).	EA		<p>Target Contract: A contract for any portion of the Target Work where there are reasonable opportunities for engaging one or more MWSBEs to perform a Commercially Useful Function in connection therewith and the total amount paid for the Target Work on that contract exceeds \$50,000.00.</p> <p>If the City notifies Developer that such opportunities exist for a particular contract or type of contract, then that contract will be considered a Target Contract unless Developer demonstrates to the reasonable satisfaction of the City that no such opportunities exist.</p> <p>If new opportunities for subcontracting to MWSBEs arise after the contract is entered into and is anticipated to have a contract price in excess of \$50,000.00, it shall be considered a New Opportunity on a Target Contract (as defined in Section 11.1 below) from that point forward. Developer will confer with the City in the event of questions about whether a particular agreement warrants classification as a Target Contract.</p>	Underway Midway	See Supplemental Handout by Atrium
9	Compliance for Contracts \$200,000 or less	At least ten (10) days prior to soliciting bids or proposals for any Target Contract anticipated to have a contract price of \$200,000 or less, Developer shall notify the City of the upcoming solicitation, and will use reasonable efforts (which are hereby acknowledged to be a lesser standard than the Good Faith Efforts standard otherwise set forth herein) to recruit MBEs, SBEs, and WBEs to participate in the Target Contract. Developer is responsible for monitoring and enforcing compliance with this Section 4 by Contractors.	EA			Underway Midway	See Supplemental Handout by Atrium
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Public Parking							
10	Public Parking	25 spaces fully dedicated to public park use in new Lot D & 50 new on-street general public spaces on Baxter Street near park	EA, CB	75 spaces	Work on parking requirements commenced February 2023 and continues into April 2025	Underway Near Complete	On street parking is available and interim accommodations have been made at parking deck adjacent to Pearl Street Park for special events, evenings, weekends and holidays in coordination with Mecklenburg County Park & Rec staff.
11	Nights & Weekends public use parking	Include -60 additional spaces for park use on nights, weekends & holidays in designated decks	EA, CB	60 additional spaces	Work on parking requirements commenced February 2023 and continues into April 2025	Underway Near Complete	On street parking is available and interim accommodations have been made at parking deck adjacent to Pearl Street Park for special events, evenings, weekends and holidays in coordination with Mecklenburg County Park & Rec staff.
12	Special Events Parking	4-6 nights and/or weekend days and nights for designated special event associated with Park for 800 spaces in designated areas (i.e. decks).	EA, CB	800 spaces in designated areas	Work on parking requirements commenced February 2023 and continues into April 2025	Underway Near Complete	On street parking is available and interim accommodations have been made at parking deck adjacent to Pearl Street Park for special events, evenings, weekends and holidays in coordination with Mecklenburg County Park & Rec staff.
13	Annual Parking Plan	Annual review of parking plan provided to County.	EA, CB			Underway Early	Mecklenburg County Park & Rec collaborates annually for parking needs.
14	Public Parking Pearl Innovation District (City)	Nights and weekends publicly accessible parking for activities and community events within district parking decks/areas or reasonably proximate to districts	EA, CB	N/A		Underway Midway	
15	Public Parking Pearl Innovation District (City)	Relocation provisions and other provisions dealing with annual review and with standard rates application	EA, CB	N/A		Underway Midway	
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Affordable / Workforce Housing							
16	On-Site Affordable/Workforce Housing	To the extent that rental housing is provided within the Project or on property reasonably proximate to the District ("On-Site") (it being understood that up to 350 units of such housing is contemplated but a determination of including rental housing within the Project has not yet been made), Developer and/or affiliates/designees will exercise diligent good faith efforts to provide that a minimum of 18 such rental housing units that may be provided (5% of units) will be reserved for affordable/workforce housing On-Site, as evidenced by issuance of building permits for such units, within 8 years of execution of this Agreement (the "Housing Period"), in accordance with the executed agreement.	EA, CB	350 housing units (18 affordable/workforce units, 5%)	50% of units at 50% AMI and balance at 50% to 80% AMI Must provide annual updates to City Neighborhood Development If fewer than 350 rental units or no rental units on site then must increase affordable/workforce housing units to be provided on N. Tryon site by 50 units o 20-year commitment from COs of units	Planning Phase	Planning phase underway.
17	Off-Site Affordable/Workforce Housing	Contribution of portion (or all) of currently owned N. Tryon site to support delivery of affordable/workforce housing including home ownership if possible. To record restrictions requiring portion of site to be available for affordable/workforce housing prior to beginning development on N. Tryon site or 18 months from agreement	EA, CB	N/A	Units will be restricted to 80% or less Area Median Income levels. Atrium will work with Inlivan to develop a small area plan for the combined 28 acres (14 acres Atrium owned and 14 acres Inlivan owned). Conservative estimate for 14-acre site: 100 units for affordable home ownership 300+ affordable multi-family housing units	Has Not Started	We have advanced discussions with Inlivan and City of Charlotte regarding development of the North Tryon site.
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Talent Pipeline & Workforce Development							
18	Construction Jobs	Expand Atrium Health and our contractors' partnership with the ROC to drive talents for construction	BP				See Supplemental Handout by Atrium

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19	Construction Jobs	Leverage existing construction apprenticeship and talent development partners like Goodwill to drive talent	BP				See Supplemental Handout by Atrium
20	Construction Jobs	Build variety of opportunities for skill development so that people can continue to advance as construction progresses	BP				See Supplemental Handout by Atrium
21	District Jobs	Creation of new jobs (in emerging technologies, administrative, etc.)		11,500 total job, 5,500 on-site jobs	Permanent Hiring Goal: One in four Advocate Health jobs in North Carolina do not require a Bachelor's degree or higher and Advocate Health pays 66% more than average for roles that are sub-baccalaureate. permanent Hiring Goal: increase to \$17.50 per hour, Atrium Health's North Carolina	Underway Midway	Established new partnership with CPCC, connecting biomedical equipment engineering students to internships mid-year and ultimately jobs. Established Early College via CCHS which will place 100 students per year in jobs across 4 pathways: neurodiagnostics technologist, nursing, radiology technologist, healthcare simulation.
22	District Jobs	Extend Atrium CMS's Rise to Success model to hire and train lab technicians and medical technicians directly from CMS high schools	BP			Underway Near Complete	Rise to Success expanded via Hawthorne and Early College into 4 pathways (see above). Discussions underway to open program at Philip O'Berry with focus on surgical technician field (target cohort of 20 in year 1)
23	District Jobs	Partner with CPCC and Charlotte Works to build Charlotte Skills Initiative, establishing workforce development hiring and training model similar	BP			Underway Midway	New partnerships underway with CPCC, specifically biomedical equipment engineering technician track. Also growing hiring of red techs and imaging techs due to increased demand for those roles.
24	Academics will align with Equity	Support JCSU in the creation of a pre-med program				Underway Early	Curriculum (advisory team in place) and student health center (currently managing, absorb ~\$300,000 annually).
25	Academics will align with Equity	Establish the Bishop George E. Battle Jr. Scholarship Endowment to support the continuing education of those who live in underserved communities		\$10m scholarship fund; \$5m in scholarships 300000 annually + \$1.5m earmarked for JCSU.		Underway Midway	Raised \$6M toward scholarship in honor of and named for Bishop Battle. The scholarship will provide funding and experiential learning opportunities to students of color pursuing medical careers. \$1.5M is earmarked for JCSU.
26	Education & Experiential Learning	Partner with CMS to develop a year-round STEM experiential learning lab for middle and high school students designed to provide skill-based career exposure modeled after FirstHand.	BOCC Presentation (BP)		The STEM Lab will occupy space on the 7th floor of The Pearl's Research Building I, immediately adjacent to speculative dry and wet lab space as part of the Wexford Connect Labs floor.	Underway Midway	\$5M+ committed towards programming, design, development and leadership of the STEM Experiential Learning Laboratory supporting Title I and peripheral Title I middle schools. MOU signed with CMS. Teacher professional development cohort began in July 2024. Student impact is articulated in PowerPoint deck.
27	STEM Lab Experiential Learning Partnerships	Partnerships for STEM Lab: The STEM Lab team has secured partnerships with CMS, the North Carolina Department of Public Instruction, UNC-C STEM Center, Smart Girls HQ, Winthrop University, Blumenthal, Whiting Turner & RJ Leeper, Siemens Healthiness and others to bring the program to life. The STEM Lab will begin programming in May 2024, via a paid teacher professional development program and student experiences that will run for the 12 months leading up to the opening of The Pearl's first two buildings.				Underway Early	Multiple partners already established for STEM lab. Companies like Medtronic, Stryker, Blumenthal Arts, Smithsonian, Hasbro, Winthrop U, Northeastern and many more have already engaged directly with students in this program.
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Community Engagement							

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28	Community Advisory Council	Creation of Community Advisory Council to provide community alignment and link programmatic work in the district to the Charlotte community.	BOCC Presentation (BP)	N/A	Community Partners to include neighborhood representatives and relevant grassroots organizations. (5-6 members). Institutional partners to include academic institutions, workforce development programs, developers (4-5 members).	Complete	Established a Community Advisory Council in 2023 to focus on successful achievement of the community-minded initiatives outlined. This Council incorporates site history, education and workforce development opportunities, and other community priorities that stakeholders agree are critical and aligned with the goals of the District.
29	Purposeful Walk Steering Committee	N/A	N/A	N/A		Complete	Purposeful Walk Steering Committee, made up of community leaders & historians, was assembled in 2022 and has met roughly 10 times over 18 months to brainstorm, envision and formalize the Purposeful Walk concept with the architecture & design team. The team is currently in the storytelling phase of the project, working in partnership with the Gantt Center, to identify, record and share the stories of the Brooklyn Community to incorporate into the outdoor, living museum experience.
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Environmental Sustainability							
30	Environmental Sustainability (Buildings)	To design and construct buildings to promote LEED standards	N/A	N/A	Both buildings in Phase IA will achieve a LEED Silver Certification and combined will be the largest Net Zero Carbon buildings in Charlotte. Use of low-carbon and low-emitting construction materials. The buildings will be designed to enhance the amount of natural light to promote mental and physical health.	Underway Early	On track. In addition to LEED standards being met, The Pearl is establishing programmatic work to drive research and entrepreneurial activity around sustainability in healthcare.
31	Environmental Sustainability (Site and Program Design)	To promote safety and an inviting environment	N/A	N/A	The Pearl will prioritize environmental and human health and walkable, accessible spaces for knowledge workers, the community and visitors. The ground plane provides open and accessible lobbies, plazas, art and pop-up activities, while recognizing the authentic history of the neighborhood.	Underway Early	On track
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Small Business / Entrepreneurship							
32	Promote Growth of New Diverse Businesses	To allocate at least \$5m from Atrium Health's new Business Incubation Fund for minority owned businesses	BP	\$5m		Underway Early	Previously allocated \$2.5m towards the fund in 2021. The balance of the contribution is pending. Invested \$2.3M in the Charlotte Small Business Growth Fund to support Community Development Financial Institutions and provide access to capital to MWBE firms