

**HOUSING AUTHORITY of the BIRMINGHAM DISTRICT**

**METROPOLITAN GARDENS**  
**HOPE VI GRANT PROGRAM**

PROGRESS REPORT  
August 2008

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September 2, 2008

**PARK PLACE**  
**GLENBROOK AT OXMOOR**

HOUSING AUTHORITY  
of the BIRMINGHAM DISTRICT

PROGRESS REPORT No. 98  
August 2008

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## SECTION 1 EXECUTIVE SUMMARY

### PROJECT PROGRESS OVERVIEW

#### Mason City,

- Phase B, a sixteen (16) house construction solicitation IFB was issued and KSH was the recommended contractor to be awarded this contract. The contract has been fully executed and the NTP issued. The contractor has completed site clearing and grading on several lots. The contractor is scheduled to install footings and foundation walls on the cleared lots before the end of September.

#### Park Place

- **Phase III – 76 Unit Mid-Rise Building Construction;**  
**Construction Progress** – 100% complete,
- **Property Management Recap**
  - Phase I: One hundred eight-eight of the one hundred ninety-seven units are currently occupied / 95% occupied.
  - Phase II: One hundred eight-eight, of the available one hundred ninety-two are currently occupied / 95% occupied.
  - Phase III: Twenty-nine of the available seventy-six units are currently occupied / 38% occupied. The Property Manager reports that with the exception of 5 units, all other units have been pre-leased.  
*Note: The 38% is the number of moved-in at the time of this report.*
- **Marconi Park**

In association with the revitalization program, enhancements to this green space had been envisioned during the project Master Plan phase. Whether these enhancements resulted in an active athletic type park and/or a passive park with quiet green areas throughout, this resultant has been discussed via various developer initiatives and non-profit concerns working on behalf of the Developer.

At present, the Property Management Co. has been working with the City Parks Department to have curfew signs installed, in attempts to curtail after hours activities at the park. The Property Management Co. has been also working with the City Parks Department regarding upgrades to shelters and picnic areas in the park.

Regarding long term plans for the Park, the Developer plans to have enhanced discussions with the City's Park Board, in an effort to jointly plan a usage for the park that will be conducive to the park users, the community, the current Park Place residents and the future planned Park Place residences.

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- **Document Submissions and Notices**
  - July Progress Report submitted to HABD by PMT.
  - Park Place Phase III, As-Built's
  - Park Place III, City of Birmingham issued Certificate of Occupancy
  - Park Place III, Architect's Certificate of Substantial Completion
  - Park Place Phase III, Construction Payment Application No. 11

## Glenbrook at Oxmoor

- **Phase I**
  - **Project Construction Progress**
    - Phase I - New Rental Units Construction;**
      - **Construction Progress** – The project contains six rental unit buildings and a management building. The project is 5% complete,
- **Phase II**
  - Regarding the Phase II AHFA tax credit application, the AHFA Board denied award of tax credits at the June 17<sup>th</sup> Board meeting for this cycle of credits. The Developer has submitted an out-of-cycle application for tax credits. Response to this application is expected in late September.

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## SECTION 2 STATUS REPORTS

### I. HOME OWNERSHIP PROGRAM

*August 2008*

In Mason City, three separate initiatives are in progress;

- ❖ Phase A, a four house construction procurement with BRIC Construction providing services, the contract was executed in August 2007. BRIC has the four houses framed and closed-in with interiors framed and drywall installed. The project sequencing was scheduled to be completed by June 30, 2008. HABD staff is currently pursuing a remedy regarding this contractor due to lack of substantial progress, as the project is now several weeks behind schedule.
- ❖ Phase B, a sixteen (16) house construction solicitation IFB was issued and KSH was the recommended contractor to be awarded this contract. The contract has been fully executed and the NTP issued. The contractor has completed site clearing and grading on several lots. The contractor is scheduled to install footings and foundation walls on the cleared lots before the end of September.
- ❖ Phase C, is the identification of an additional six to ten lots by HABD staff, for a third construction phase. The staff is currently verifying ownership criteria; property appraisals have been received and offers are being made to property owners.

In Southhampton, all of the houses have been certified as substantially complete and City of Birmingham Certificates Of Occupancy have been issued. All nine houses have closed.

The HABD Home Ownership program is continuing. The staff is working to solicit for additional persons for the program and marketing the houses just recently completed.

### II. PARK PLACE - PROJECT PROGRESS OVERVIEW

*August 2008*

#### A Demolition Project

- i. **Phase 1 Demolition and Phase 2A Demolition**, Blocks B, C, D, E, F work is complete and Close-out and final payments have been processed.
- ii. **Demolition of Block 'A'** is complete. Close-out and final payments have been processed.

#### B Project Construction Progress

- i. **Infrastructure-Street Improvements Project-Sanitary Sewer Project:**  
The first phase of the Infrastructure improvements has been completed. Close-out and final payments have been processed.
- ii. **Infrastructure-Street Improvements Project-Sanitary Sewer Project (Phase II):**  
Dunn Construction Company was procured to provide services and a Notice to Proceed was issued, effective June 31, 2005. Services are 100% complete. Close-out and HABD final payments have been processed.

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SECTION 2  
STATUS REPORTS

- iii. **Phase 1 Site Remediation Project Blocks B south, C, F west**  
Funds for the Site Preparation Project are included within the HABD Capital Funds commitment for Demolition - Site Preparation pursuant to the Master Developer Agreement, Exhibit D. The project contract is a GMP construction contract in the amount of \$680,000.00 for construction plus MGD construction management fees. Construction services have been completed.
- iv. **Phase 2 Site Remediation Project Blocks D, E, F east**  
Site Remediation services related to the Phase 2 development has been completed. The project contract was a GMP construction contract in the amount of \$1,084,000.00 for construction plus MGD construction management fees. Construction services have been completed.
- v. **Phase I - New Rental Units Construction;**  
**Construction** - 100% complete. Close-out and HABD final payments have been processed. Final Endorsement closing with FHA occurred on May 25, 2007.
- vi. **Phase II - New Rental Units Construction;**
  - 1. **Construction Progress** – 100% complete. Close-out and HABD final payments have been processed. Final Endorsement closing with FHA occurred on July 17, 2008.
- vii. **Phase III – 76 Unit Mid-Rise Building Construction;**  
**Construction Progress** – 100% complete, Close-out and HABD final payments are anticipated to be processed in September.
  - 1. **Payment Applications:**  
Park Place Phase III, Construction Payment Application No. 11.

**C Property Management Recap**

The Property Manager reports that speculative traffic/activity continues to be strong. All of the phase I, one hundred ninety-seven units and phase II, one hundred ninety-eight units are being managed by the property manager.

Buildings being managed by the property manager;

Phase I: Buildings 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17 & Leasing Center

Phase II: Buildings 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16.

Phase III: Mid-rise Building

Occupied Units:

Phase I: One hundred eight-eight of the one hundred ninety-seven units are currently occupied / 95% occupied.

Phase II: One hundred eight-eight, of the available one hundred ninety-two are currently occupied / 95% occupied.

Phase III: Twenty-nine of the available seventy-six units are currently occupied / 38% occupied. The Property Manager reports that with the exception of 5 units, all other units have been pre-leased.

*Note: The 38% is the number of moved-in at the time of this report.*

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**SECTION 2  
STATUS REPORTS**

**D Developer Work in Progress**

MGD is currently focused on the following activities:

- i. Phase III Block 'A' Development.
- ii. Coordination with the City of Birmingham, City of Birmingham Parks and Recreation Department, and area neighborhood groups / organizations regarding Marconi Park.
- iii. Property Management services, including marketing, maintenance and coordination/interaction with residents.
- iv.

**Marconi Park**

In association with the revitalization program, enhancements to this green space had been envisioned during the project Master Plan phase. Whether these enhancements resulted in an active athletic type park and/or a passive park with quiet green areas throughout, this resultant has been discussed via various developer initiatives and non-profit concerns working on behalf of the Developer.

At present, the Property Management Co. has been working with the City Parks Department to have curfew signs installed, in attempts to curtail after hours activities at the park. The Property Management Co. has been also working with the City Parks Department regarding upgrades to shelters and picnic areas in the park.

Regarding long term plans for the Park, the Developer plans to have enhanced discussions with the City's Park Board, in an effort to jointly plan a usage for the park that will be conducive to the park users, the community, the current Park Place residents and the future planned Park Place residences.

**E Approvals Status**

Budget Revision No. 7

**F Project Related Meetings**

August 18

HABD Board of Commissioners Meeting:

August 19

Park Place Phase III – Transition Meeting

**G Document Submissions and Notices**

- o July Progress Report submitted to HABD by PMT.
- o Park Place Phase III, As-Built's
- o Park Place III, City of Birmingham issued Certificate of Occupancy
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- o Park Place Phase III, Construction Payment Application No. 11

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**SECTION 3  
STATUS REPORTS**

**H Key Project Issues**

- i. Home Ownership Units/Program
- ii. Block 'A' & Block 'B' North conceptual design coordination.
- iii. Community Center Programming Coordination
- iv. Marconi Park Planning Process w/ City of Birmingham, ONB and Community Neighbors
- v. Clarification of and receipt from the City of Birmingham, remaining financial commitments towards the infrastructure implementation.

**III. GLENBROOK AT OXMOOR - PROJECT PROGRESS OVERVIEW**

*August 2008*

**I. Off-Site Development - Project Progress Overview**

The RFP was released and forwarded to potential proposers, September 8, 2004, with the Pre-proposal Conference, held on September 23<sup>rd</sup>. Ten proposer entities were represented at this meeting. One proposal was received on September 30, 2004, from Pennrose Properties, LLC/Formation Methods, LLC (P/FM). The Master Development Agreement was executed on September 13, 2005.

The Developer did submit an 'out-of-cycle' tax credit application to the AHFA in early 2007. Based upon preliminary feedback from the AHFA, the application was withdrawn. In September 2007, the Developer submitted an enhanced application in advance of the October AHFA Board meeting. The AHFA Board approved the application for funding at the October 10<sup>th</sup> Board meeting.

The Developer submitted the Site Acquisition Proposal that was forwarded to HUD for approval. A revised budget has been submitted by the Developer and is being reviewed and the developer is continuing to submit appropriate documentation to AHFA, as they precede towards a Phase I closing. A resolution was approved by the HADB Board of Commissioners to proceed with the Oxmoor Phase I closing. The closing occurred on June 11<sup>th</sup>, and the contractor was issued a Notice to Proceed and construction services have commenced.

Regarding the Phase II AHFA tax credit application, the AHFA Board denied award of tax credits at the June 17<sup>th</sup> Board meeting for this cycle of credits. The Developer has submitted an out-of-cycle application for tax credits. Response to this application is expected in late September.

**A Approvals Status**

None pending

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**B Project Construction Progress**

**i. Phase I - New Rental Units Construction;**

- 1. Construction Progress** – The project contains six rental unit buildings and a management building. The project is 5% complete, NTP issued June 15, 2008, 357 day construction services contract.

Building 1

Wall foundation installations have been completed and underground MEP rough-ins have been completed.

Building 2

Wall foundation installations have been completed and underground MEP rough-ins have been completed.

Building 3

The subgrade pad has been prepared, wall foundations and basement walls have been installed.

Building 4

Wall foundations and basement walls have been installed.

Building 5

The subgrade pad has been prepared and completed.

Management Building

Under slab MEP rough-ins have been completed, as well as the slab on grade pour.

**2. Payment Applications:**

None submitted

**C Project Related Meetings**

August 05

Oxmoor – Bi-Weekly Construction Status Meeting

August 18

HABD Board of Commissioners Meeting:

August 19

Oxmoor – Bi-Weekly Construction Status Meeting

**D Document Submissions and Notices**

Glenbrook at Oxmoor Recorded Plat

**E Key Project Issues**

- i. Phase I - AHFA Tax Credit Award submissions
- ii. Phase I – Construction Services
- iii. Phase II – AHFA Tax Credit Application – Out-of-Cycle Application

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## SECTION 4 STATUS REPORTS

### IV. GRANT PROGRAM FINANCIAL STATUS

The PMT, Project Accountant, Dennis Mobley, continues to monitor the overall project financial status through HABD Finance Department. To date expenditures are in compliance with Approved Predevelopment Budget expectations for Relocation, HABD Administration, Program Management fees and MGD costs including: Demolition, Infrastructure, MGD project management, Pre-Development Loan Agreement pertaining to Third Party Costs and Advance against Developer Fees.

- Park Place Phase III, Construction Payment Application No. 11

## SECTION 5 APPENDIX

- SITE; UPDATE PHOTOS
- IMS WEEKLY REPORT; PARK PLACE PHASE I, 01 September 2008
- IMS WEEKLY REPORT; PARK PLACE PHASE II, 01 September 2008
- KEY PROJECT ACTIVITIES SCHEDULE, updated to 31 August 2008.
- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 31 August 2008.