

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
December 2005

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January 11, 2005

PARK PLACE DOWNTOWN NORTHWEST

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I. HOME OWNERSHIP PROGRAM

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ReMax scope of services contract, to locate and identify other potential properties for homeownership sites/acquisition, has been executed. ReMax is currently proceeding to procure properties in the Mason City area.

In Mason City, additional property appraisals have been clarified and the HABD, through ReMax, has been continuing to make offers to homeowners, and identifying additional properties for acquisition.

In Southhampton, the contractor has been issued a notice to proceed on the construction of nine homes, in association with the HABD lease/purchase program.

The HABD Home Ownership program is continuing. The staff is working to solicit for additional persons for the program. The construction contract for the nine homes project has been executed, but the contractor has yet to proceed with services due to bonding issues.

II. PARK PLACE - PROJECT PROGRESS OVERVIEW

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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 yet to be processed.
 1. **Payment Applications:**
None submitted.

B Project Construction Progress

- i. **Infrastructure-Street Improvements Project-Sanitary Sewer Project:**
The first phase of the Infrastructure improvements has been completed.

The as-built drawings are being prepared prior to close out of this phase.

- ii. **Infrastructure-Street Improvements Project-Sanitary Sewer Project (Phase II):**
The procurement process for a contractor to provide services was held during May, with Dunn Construction Company, being issued a Notice to Proceed, effective May 31, 2005.

During this monthly reporting period, in Blocks D & E, Dunn has installed driveways, done some fine grading and compactions, installed light pole bases and placed topsoil; in Block F, the asphalt seal was placed and some roadway striping completed.

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1. **Payment Applications:**
None submitted.

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

1. **Construction Progress** – Approximately 99% complete, based on the total construction contract value;

Block 'B' - South

- o 100% Complete

Block 'C' - North

- o 100% Complete

Block 'C' - South

- o 100% Complete

Block 'F' - West

- o 100% Complete

2. **Payment Applications:**

None Submitted

iv. **Phase II - New Rental Units Construction;**

1. **Construction Progress** – Approximately 32% complete, based on the total construction contract value;

Block 'D'

Building 10 (Type 3C)

- o Rough Carpentry – 28%
- o Plumbing & Hot Water (underground work) – 20%
- o Electrical – 16%

Building 11 (Type 04)

- o Rough Carpentry – 79%
- o Plumbing & Hot Water (underground work) – 20%
- o Electrical - 10%

Building 12 (Type 3C)

- o Rough Carpentry – 11%
- o Plumbing & Hot Water (underground work) – 20%
- o Electrical – 16%

Building 13 (Type 3C)

- o Concrete Work – 81%
- o Plumbing & Hot Water (underground work) – 20%
- o Electrical – 16%

Building 14 (Type 3C)

- o Plumbing & Hot Water (underground work) – 20%
- o Electrical – 16%

Building 15 (Type 08)

- o Rough Carpentry – 30%
- o Plumbing & Hot Water (underground work) – 20%
- o Electrical – 16%

Building 16 (Type 04)

- o Rough Carpentry – 23%
- o Plumbing & Hot Water (underground work) – 20%
- o Electrical – 10%

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Block 'E'

Building 04 (Type 03)

- Rough Carpentry – 100%
- Finish Carpentry – 62%
- Roofing – 100%
- Doors – 29%
- Windows – 100%
- Drywall – 15%
- Plumbing & Hot Water – 75%
- Air Conditioning – 75%
- Electrical – 75%

Building 05 (Type 06)

- Rough Carpentry – 100%
- Finish Carpentry – 71%
- Roofing – 25%
- Windows – 100%
- Drywall – 15%
- Plumbing & Hot Water (underground work) – 20%
- Electrical – 9%

Building 06 (Type 3A)

- Rough Carpentry – 90%
- Finish Carpentry – 64%
- Plumbing & Hot Water (underground work) – 20%
- Electrical – 17%

Building 07 (Type 3A)

- Rough Carpentry – 80%
- Finish Carpentry – 17%
- Plumbing & Hot Water (underground work) – 20%
- Electrical – 17%

Building 08 (Type 04)

- Rough Carpentry – 100%
- Finish Carpentry – 80%
- Roofing – 100%
- Windows – 100%
- Doors – 31%
- Plumbing & Hot Water – 45%
- Electrical – 10%

Building 09 (Type 04)

- Rough Carpentry – 74%
- Finish Carpentry – 65%
- Plumbing & Hot Water (underground work) – 20%
- Electrical – 10%

Block 'F' - East

Building 1 (Type 3C)

- Rough Carpentry – 100%
- Finish Carpentry – 70%
- Roofing – 100%
- Drywall – 15%
- Doors – 81%
- Plumbing & Hot Water – 75%
- Air Conditioning – 75%
- Electrical – 75%

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Building 2 (Type 3)

- o Rough Carpentry – 100%
- o Finish Carpentry – 73%
- o Roofing – 100%
- o Windows – 100%
- o Drywall – 15%
- o Doors – 34%
- o Plumbing & Hot Water – 75%
- o Air Conditioning – 75%
- o Electrical – 75%

Building 3 (Type 3C)

- o Rough Carpentry – 100%
- o Finish Carpentry – 65%
- o Roofing – 100%
- o Windows – 100%
- o Drywall – 15%
- o Doors – 31%
- o Plumbing & Hot Water – 75%
- o Air Conditioning – 75%
- o Electrical – 75%

2. Payment Applications:

Phase II – Housing Pay Application No. 9

v. 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.

vi. 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.

vii. MBE/DBE and Section 3 Participation

The following is a breakdown of MBE/DBE/Section 3 company's participation in the various active project segments. The contractor will be updating this information to the HABD on a quarterly basis.

	<u>Participating Companies</u>	<u>% of Total Contract Value</u>
Phase II Infrastructure Construction Services		
MBE Entities	67%	28.4%
Section 3 Entities	0%	0%
Local Companies	100%	100%
Housing Construction Services – Phase II		
MBE Entities	12%	16%
Section 3 Entities	12%	12%
Local Companies	N/A%	N/A%

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C Property Management Recap

The Property Manager reports that speculative traffic/activity continues to be strong. In excess of one hundred persons either called or visited the property during the month. Upon issuance of the PTO (Permission To Occupy) certification from the HUD inspector, the keys to the units are released to the property manager from the contractor. All of the phase I, one hundred ninety-seven units have been released to the property manager.

Buildings acquired from the contractor;

Phase I: Buildings 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17 & Leasing Center
Phase II: None

Occupied Units: One hundred ninety-two w/ one of the remaining units pre-leased

Market Rate Units – Sixty-five of the designated seventy (the remaining unit is pre-leased)

Affordable Units – Forty of the designated forty

Authority Assisted Units – Eighty-seven of the designated eighty-seven

Applications Pending/Renewals

Market Rate Units – None/Three

(w/ no additional applicants currently on Waiting List)

Affordable Units – None/Two

(w/ an additional fifteen applicants on the Waiting List)

Authority Assisted Units – None/Six

(w/ an additional one hundred ten applicants on the Site Based Waiting List)

The following are Marketing/Leasing Goals established by the Property Manager:

- o Increased marketing at various local businesses (UAB, AmSouth Bank, Regions Bank etc.) through flyers and hand-outs. We are currently in the process of implementing marketing efforts as outlined in the marketing plan derived by Pat Thomas. This task is key when considering lease-up of Phase II which is currently slated for building receipt beginning January 2006.
- o Open House/Gala event is in process in order to improve community image and awareness.

D Phase 3 Design Development and Construction Documents

The development of financial and design strategies towards implementation of the Block 'A' and Block 'B' North revitalization's are currently being modified by the Development team. The Development team has procured an Architect to assist in their planning process and a pre-development budget from the developer is expected to be submitted. The Development team is resolving issues related to the Phase I & Phase II of the Development prior to proceeding with Phase III.

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E Developer Work in Progress

MGD is currently focused on the following activities:

- i. Close-out of Phase I, Building Construction Project.
- ii. Phase II, Infrastructure Project Construction services.
- iii. Phase II, Building Construction Project.
- iv. Phase III Block 'A' & Block 'B' North Development.
- v. Coordination with City of Birmingham Parks and Recreation Department, and vicinity entities regarding Marconi Park.
- vi. Property Management services, including marketing, maintenance and coordination/interaction with residents.

F Approvals Status

- i. None Pending Currently

G Project Related Meetings

December 5

Owner Architect Contractor (OAC) Update Meeting: HABD / MGD / Contractor / Architect / PMT

Weekly Progress Review Meeting: MGD / PMT

December 12

Phase III – Tax Credit Conference Call Coordination

Weekly Progress Review Meeting: MGD / PMT

December 13

Infrastructure Services Update Meeting: HABD / MGD / Contractor / Architect / PMT

December 14

HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT

December 19

Owner Architect Contractor (OAC) Update Meeting: HABD / MGD / Contractor / Architect / PMT

Weekly Progress Review Meeting: MGD / PMT

HABD Board of Commissioners Meeting: HABD / PMT

H Document Submissions and Notices

- o November Progress Report submitted to HABD by PMT.
- o Phase III – Senior Building schematics
- o Park Place Pay Applications
 - Phase II – Housing Pay Application No. 9

I Schedule Review

- o Phase II – Infrastructure Improvements
- o Phase 2 – Housing Units Construction

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J Key Project Issues

- i. Phase 2 Infrastructure Project –Construction Services Phase.
- ii. Phase 2 Housing Units Project –Construction Services Phase.
- iii. Home Ownership Program
- iv. Block 'A' & Block 'B' North conceptual design coordination.

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III. DOWNTOWN NORTHWEST - PROJECT PROGRESS OVERVIEW

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I. Downtown Northwest - Project Progress Overview

The RFP was released and forwarded to potential proposers, September 8, 2004 with the Pre-proposal Conference, held on September 23rd. 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 is currently refining the Project Master Plan, identifying parcels for acquisition; coordinating with the City their possible assistance to acquire parcels and participation in this project, prioritizing parcels based on an implementation schedule and anticipated cost to acquire. P/FM is also preparing a project budget, schedule and phasing plan.

A Pre-development Budget was submitted for review/approval in December.

A Project Related Meetings

December 1

Project Planning Session/Conference Call: HABD / P-FM / PMT

December 7

Project Planning Session: HABD / P-FM / PMT

December 14

HABD Progress Review Meeting: HABD Executive / HABD Specialists / MGD / PMT

December 16

Project Planning Session/Conference Call: HABD / P-FM / PMT

December 19

HABD Board of Commissioners Meeting: HABD / PMT

December 21

Project Planning Coordination Meeting with City of Birmingham: City / HABD / P-FM / PMT

B Document Submissions and Notices

- o Pre Development Budget

C Key Project Issues

- i. Project Budget
- ii. Acquisition Plan / Land Acquisitions
- iii. Development Plan
- iv. Amended Revitalization Plan

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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.

- Phase II – Housing Pay Application No. 9

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APPENDIX

- SITE UPDATE PHOTOS.
- KEY PROJECT ACTIVITIES SCHEDULE, 31December05.
- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 31December05.
- PARK PLACE: PHASE 2 PROJECT IMPLEMENTATION SCHEDULE, updated to 31December05.
- HOPE VI Revitalization Grant Program: Financial Summary Report – 3rd Quarter 2005