

**HOUSING AUTHORITY of the BIRMINGHAM DISTRICT**

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

PROGRESS REPORT  
February 2009

Program Managers \_\_\_\_\_

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March 2, 2009

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

HOUSING AUTHORITY  
of the BIRMINGHAM DISTRICT

PROGRESS REPORT No. 104  
February 2009

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## SECTION 1 EXECUTIVE SUMMARY

### PROJECT PROGRESS OVERVIEW

#### Park Place

- Property Management Recap

Occupied Units:

Phase I: One hundred seventy-six of the one hundred ninety-seven units are currently occupied / 89% occupied.

Phase II: One hundred seventy-eight of the available one hundred ninety-eight units are currently occupied / 90% occupied.

Phase III: Seventy-five of the available seventy-six units are currently occupied / 99% occupied.

#### 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 77% complete, NTP issued June 15, 2008, 357 day construction services contract. The first residents are planned to be moved in May.

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## SECTION 2 STATUS REPORTS

### I. HOME OWNERSHIP PROGRAM

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In Mason City, three separate initiatives are in progress;

- ❖ Phase A, a four (4) house construction procurement with BRIC Construction providing services, the contract was executed in August 2007. The group completed a review of the four houses to document the completed items and work remaining to be completed as soon as possible. Bric has received payment in December and agree to complete the houses in thirty days. Bric has not completed the houses, but they have made progress. The owner is expecting the contractor to request a final inspection in March.
- ❖ 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 the excavation for the installation of the footings, foundation walls and preliminary site grading at several lots. HABD has received city approval of zoning variance on several lots along the Northland Avenue right-of-way.
- ❖ Phase C, is the identification of an additional ten lots by HABD staff, for a third construction phase. The authority's staff has completed verifying ownership of the properties and has made sale offers. The Phase C group has not started as planned due to property acquisition issues in the neighborhood. HABD has only obtained ownership to one of the planned ten properties.

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

*February 2009*

#### 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 Status** - 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;**  
**Construction Status** - 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 Status** - 100% complete. Close-out and HABD final payments were processed in September.

**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, the phase II, one hundred ninety-eight units and the seventy-six unit mid-rise 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 seventy-six of the one hundred ninety-seven units are currently occupied / 89% occupied.

Phase II: One hundred seventy-eight of the available one hundred ninety-eight units are currently occupied / 90% occupied.

Phase III: Seventy-five of the available seventy-six units are currently occupied / 99% occupied.

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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.

### **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.

Regarding long term plans for the Park, The Park Board accepted our request to make a presentation at their October 1<sup>st</sup> Board meeting. At that time the HABD, Developer and PMT presented an overview of the Metropolitan Gardens HOPE VI Program, the Park Place development and a desire to work with the Park Board to enhance the Marconi Park for the benefit of all potential users.

As suggested by the Park Board, a committee comprised of representatives from the Parks & Recreation staff and Board, the Phillips School Principal, the Birmingham Ravens, Central City Neighborhood Association, MGD and the HABD met in early November. This group discussed the parks current activities and user groups, along with potential optional locations that the users could relocate their programs/activities. Also, discussed were potential costs to minimally upgrade Marconi Park as is and the possible funding source(s) for the upgrade.

The resultant of this initial meeting were a number of investigative items to be pursued by Parks & Recreation and MGD, which include verification of programs currently functioning in other City parks, to determine if some of the current Marconi activities can be moved to another park. Also, MGD is to contact local non-profits as potential funding sources via procured grants; MGD expressed the opportunity may be available to have planners participation in a charrette type program, to do a master plan study of the park.

This group did resolve that plans regarding the future of Marconi will be prepared as a cooperative effort, and if any activities involving the athletic programs are relocated, the relocations will be to a 'permanent' location.

The next meeting of this group has yet to be scheduled.

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SECTION 2  
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**E Approvals Status**

None pending

**F Project Related Meetings**

February 4

HOPE VI Update Meeting

February 9

Grant Close-out, Financial Coordination Meeting

February 12

Grant Close-out, Financial Coordination Meeting

February 17

Oxmoor – Bi-Weekly Construction Status Meeting

February 19

HABD Board of Commissioners Meeting:

**G Document Submissions and Notices**

- o January Progress Report submitted to HABD by PMT.

**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 and Community Neighbors
- v. Park Place Swimming Pool implementation.
- vi. Clarification of and receipt from the City of Birmingham, remaining financial commitments towards the infrastructure implementation.
- vii. HOPE VI Grant closure process.

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SECTION 3  
STATUS REPORTS

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

*February 2009*

**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.

A resolution was approved by the HABD 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 had submitted an out-of-cycle application for tax credits and again denied tax credits for this development phase. The Developer is planning another resubmission to coincide with the spring 2009 round of submissions.

**A Approvals Status**

None pending

**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 77% complete, NTP issued June 15, 2008, 357 day construction services contract. The first residents are planned to be moved in May.

General Note:

Most of the rental unit buildings are of a split level design to correspond with the site grading. The buildings are three level slab-on-grade buildings, but along the long axis, the buildings are shifted to have half of the building a level lower than the other half of the building, thus the buildings have a lower slab to be poured and an upper slab to be poured.

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SECTION 3  
STATUS REPORTS

Buildings 1 & 2

Tile floor coverings, cabinets, appliances, trim, electrical trim components (light fixtures, outlets, wall plates and finish paint coat has been installed. Contractor is completing final construction elements to building, such as window treatments, carpet and paint touch-ups.

Building 2

Tile floor coverings, cabinets, trim, electrical trim components (light fixtures, outlets, wall plates and finish paint coat has been installed. Contractor is completing final construction elements to building, such as window treatments, appliances installations, carpet and paint touch-ups.

Building 3

The primer paint coat, interior doors and balcony rails have been installed.

Building 4

Tile floor coverings, cabinets, and electrical trim components (light fixtures, outlets, wall plates.

Building 5

On the exterior of the building additional painting is necessary, otherwise all masonry and siding installation has been completed and texture painting of the interior drywall has been completed.

Building 6

The primer paint coat, interior doors and balcony rails have been installed.

Management Building

With the exception of connection to permanent power and final punch list items, this building has been completed.

**2. Payment Applications:**

GAO – Payment Application 8

GAO – Phase II / Phase III Land Acquisition Request

**C Project Related Meetings**

February 3

Oxmoor – Bi-Weekly Construction Status Meeting

February 4

HOPE VI Update Meeting

February 12

Pennrose Management; Marketing Plan Review

February 17

Oxmoor – Bi-Weekly Construction Status Meeting

February 19

HABD Board of Commissioners Meeting:

**D Document Submissions and Notices**

GAO – Payment Application 8

GAO – Phase II / Phase III Land Acquisition Request

Certified Payrolls

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SECTION 3  
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**E Key Project Issues**

- i. Phase I - AHFA Tax Credit Award commitment letter submissions
- ii. Phase II - AHFA Tax Credit submission
- iii. Phase I – Construction Services

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.

- o None Submitted

SECTION 5  
APPENDIX

- o SITE; UPDATE PHOTOS
  
- o IMS WEEKLY REPORT; PARK PLACE PHASE I, 28 February 2008
  
- o IMS WEEKLY REPORT; PARK PLACE PHASE II, 28 February 2008
  
- o IMS WEEKLY REPORT; PARK PLACE PHASE III, 28 February 2008