

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
January 2007

Program Managers _____

BOULEVARD GROUP INC.

484 Boulevard SE
Atlanta, GA. 30312

Tel. 404.622.7879
fax 404.622.9395

2323 – 1st Avenue North
Birmingham AL 35203

Tel. 205.327.2702
fax 205.327.2704

February 2, 2007

PARK PLACE OFF-SITE DEVELOPMENT

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SECTION 1 STATUS REPORTS

I. HOME OWNERSHIP PROGRAM

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In Mason City, additional property appraisals have been clarified and the HABD has been continuing to make offers to homeowners. An additional ten properties have been identified as potential for acquisition and to date seven properties have been acquired. The HABD has proceeded with the preparation of construction documents for houses on these seven parcels. The Advertisement for construction services for five of these houses is scheduled to be released February 11th, with the bid opening on March 13th.

In Southhampton, all of the houses have been certified as substantially complete and City of Birmingham Certificates Of Occupancy issued. There are outstanding 'punch list' items to complete and coordination with the contractor regarding a few final adjustments.

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

January 2007

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.

The contractor has completed remaining landscape, pavement striping and sidewalk repairs associated with this contract. All services have been completed but not yet invoiced.

1. Payment Applications:

Phase II, Infrastructure Construction Services Pay Application No. 13

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

Construction - 100% complete. Close-out and HABD final payments have been processed.

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- iv. **Phase II - New Rental Units Construction;**
1. **Construction Progress** – 100% complete, based on the total construction contract value.
 2. **Payment Applications:**
Phase II, Building Construction Pay Application No. 23
- 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.

C Property Management Recap

The Property Manager reports that speculative traffic/activity continues to be strong. In excess of one hundred persons continue to either call or visit the property each 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 and phase II, one hundred ninety-eight 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: Buildings 1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16.

Occupied Units:

Phase I: One hundred eighty, of the one hundred ninety-seven units are currently occupied (91% occupied).

Phase II: Ten, of the available thirty-four units are currently occupied (29% occupied)

D Phase 3 Design Development and Construction Documents

On the northeast quadrant of Block 'B', a seventy-six unit mid-rise for seniors is being planned for this area. Construction documents have been forwarded to the City for permit review and issuance of the building permit is pending payment of fees by the contractor. The Rental Term Sheet was submitted to HUD in November and the Evidentiary Documents were submitted in December to HUD for review and approval in advance of an anticipated February closing.

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E Developer Work in Progress

MGD is currently focused on the following activities:

- i. Phase I, Final Endorsement coordination with FHA.
- ii. Phase III Block 'A' & Block 'B' North Development.
- iii. Phase III Closing.
- iv. Coordination with City of Birmingham Parks and Recreation Department, and vicinity entities regarding Marconi Park.
- v. Property Management services, including marketing, maintenance and coordination/interaction with residents.

F Approvals Status

Phase III Rental Term Sheet – Pending

Phase III Evidentiary Documents – Pending

Phase II Building No. 11; HUD PTO & City of Birmingham TCO - Approved

Phase II Building No. 12; HUD PTO & City of Birmingham TCO - Approved

Phase II Building No. 13; HUD PTO & City of Birmingham TCO - Approved

Phase II Building No. 14; HUD PTO & City of Birmingham TCO - Approved

Phase II Building No. 15; HUD PTO & City of Birmingham TCO - Approved

Phase II Building No. 16; HUD PTO & City of Birmingham TCO - Approved

G Project Related Meetings

January 03

Phase III – Closing Coordination Conference Call:

January 10

Phase III – Closing Coordination Conference Call:

HABD HOPE VI Progress Review Meeting

January 17

Phase III – Closing Coordination Conference Call:

January 18

HABD Board of Commissioners Meeting:

January 24

Phase III – Closing Coordination Conference Call:

HABD HOPE VI Progress Review Meeting

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H Document Submissions and Notices

- o December Progress Report submitted to HABD by PMT.
- o Phase II, Building Construction Pay Application No. 23
- o Phase II, Infrastructure Construction Services Pay Application No. 13
- o Building 4 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 5 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 6 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 7 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 8 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 9 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 10 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 11 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 12 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 13 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 14 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 15 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.
- o Building 16 – Architect’s Certificate of Substantial Completion, HUD P.T.O. Certification, City of Birmingham T.C.O.

I Key Project Issues

- i. Phase 3 Mid-Rise Project – Closing.
- ii. Phase 3 Mid-Rise Project – Construction Services Phase
- iii. Home Ownership Program
- iv. Block ‘A’ & Block ‘B’ North conceptual design coordination.
- v. Marconi Park Planning Process w/ City of Birmingham

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III. GLENBROOK AT OXMOOR - PROJECT PROGRESS OVERVIEW

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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 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 continuing to move forward with documentation supportive of the AHFA Tax Credit application; updating the Market Study, obtaining the environmental site investigation report, property zoning certification via the City, budget refinement and also completion of the schematic design set of documents, that illustrate the planned development and phasing.

A Project Related Meetings

January 03

AHFA Coordination/Clarification Conference Call

January 08

Sandridge Neighborhood Association Meeting

January 10

HABD HOPE VI Progress Review Meeting

January 18

HABD Board of Commissioners Meeting:

January 08

Project Status Conference Call

B Document Submissions and Notices

- o None

C Key Project Issues

- i. Project Budget
- ii. Development Plan
- iii. 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, Building Construction Pay Application No. 23
- Phase II, Infrastructure Construction Services Pay Application No. 13

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APPENDIX

- HUD HOPE VI REVITALIZATION GRANT PROGRAM: FINANCIAL SUMMARY REPORT, reporting period; 4th Quarter, Calendar Year 2006

- KEY PROJECT ACTIVITIES SCHEDULE, 31 January 2007.

- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 31 January 2007.

- PARK PLACE: PHASE 2 PROJECT IMPLEMENTATION SCHEDULE, updated to 31 January 2007.