

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
June 2007

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July 2, 2007

PARK PLACE OFF-SITE DEVELOPMENT

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SECTION 1 STATUS REPORTS

I. HOME OWNERSHIP PROGRAM

June 2007

In Mason City, additional property appraisals have been clarified and the HABD has been continuing to make offers to homeowners. Ten properties had 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 four of these houses was released on February 11th, with five bids received at the April 27th, bid opening. A recommended contractor, BRIC Inc. was approved by the HABD Board of Commissioners and their contract has been prepared. BRIC has returned an executed contract. Upon verification of some contractor financial information, the HABD will execute the contract, schedule a pre-construction conference and issue a notice to proceed prior to commencement of construction.

In Southhampton, all of the houses have been certified as substantially complete and City of Birmingham Certificates Of Occupancy issued. Six closings have occurred to date and the other closings are pending.

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

June 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:

None submitted during this reporting period.

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- iii. **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.
- iv. **Phase II - New Rental Units Construction;**
 - 1. **Construction Progress** – 100% complete, based on the total construction contract value. Payment of the construction retainage funds is pending.
 - 2. **Payment Applications:**
None submitted during this reporting period. Final retainage release is still outstanding.
- 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 sixty-six, of the one hundred ninety-seven units are currently occupied (84% occupied).

Phase II: One hundred eighteen, of the available one hundred ninety-eight are currently occupied (60% occupied). An additional fifteen applications have approvals pending.

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D Phase 3 Design Development and Construction Documents

On the northeast quadrant of Block 'B', a seventy-six unit mid-rise for seniors is planned. 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 July closing. The Developer has completed negotiating contract terms with the proposed General Contractor and a contract has been executed.

E Developer Work in Progress

MGD is currently focused on the following activities:

- i. Phase II, Final Endorsement coordination with FHA.
- ii. Phase III Block 'A' & Block 'B' North Development.
- iii. Phase III Closing.
- iv. Coordination via the non-profit Carraway CDC, 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
Budget Revision #5 - Pending

G Project Related Meetings

June 13
HABD HOPE VI Progress Review Meeting
June 25
HABD Board of Commissioners Meeting:

H Document Submissions and Notices

- o May Progress Report submitted to HABD by PMT.

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. Community Center Programming Coordination
- vi. Marconi Park Planning Process w/ City of Birmingham
- vii. Reconciliation of Infrastructure costs as related to the City of Birmingham's financial commitment.

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SECTION 2
STATUS REPORTS

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 did submit an 'out-of-cycle' tax credit application to the AHFA. Based upon preliminary feedback from the AHFA, Pennrose/Formation Methods had withdrawn the application, planning to resubmit an enhanced application in May 2007. AHFA informed the Developer that an application at this time could not be accepted due to the regular cycle applications process. Another submittal is scheduled for September.

The Developer is continuing to rework the Master Plan, with an emphasis to reduce site related cost caused by the apparently difficult topography of the property. We are to receive a revised Master Plan, Building Plans and Project Budget upon further reconciliation of the site issues.

A Project Related Meetings

June 13

HABD HOPE VI Progress Review Meeting

June 25

HABD Board of Commissioners Meeting:

B Document Submissions and Notices

- o None

C Key Project Issues

- i. Project Budget
- ii. AHFA Out-of-Cycle Tax Credit Application
- iii. Development Plan

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SECTION 3
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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.

SECTION 4
APPENDIX

- IMS WEEKLY REPORT; PARK PLACE PHASE I, 29 June 2007
- IMS WEEKLY REPORT; PARK PLACE PHASE II, 29 June 2007
- KEY PROJECT ACTIVITIES SCHEDULE, 30 June 2007.
- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 30 June 2007.