

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
NOVEMBER 2008

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December 3, 2008

PARK PLACE
GLENBROOK AT OXMOOR

HOUSING AUTHORITY
of the BIRMINGHAM DISTRICT

PROGRESS REPORT No. 101
November 2008

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SECTION 1 EXECUTIVE SUMMARY

PROJECT PROGRESS OVERVIEW

- **Property Management Recap**

Occupied Units:

Phase I: One hundred seventy-nine of the one hundred ninety-seven units are currently occupied / 91% occupied.

Phase II: One hundred seventy-six of the available one hundred ninety-eight are currently occupied / 89% occupied.

Phase III: Seventy-three of the available seventy-six units are currently occupied / 96% occupied.

Marconi Park

As suggested by the Park Board, a committee is being established to determine a best future usage and programming for the Park. An initial meeting of this committee was held Nov. 10th.

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.

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 51% complete, NTP issued June 15, 2008, 357 day construction services contract.

- **Phase II**

- Regarding the Phase II AHFA tax credit application, the AHFA Board denied award of tax credits at the June 17th Board meeting for this cycle of credits. The Developer has submitted an out-of-cycle application for tax credits and has been again denied tax credits for this development phase. The Developer is planning another resubmission to coincide with the spring 2009 round of submissions.

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SECTION 2
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I. HOME OWNERSHIP PROGRAM

November 2008

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. 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, architect, BRIC and BCIA met in November to coordinate a resolution of the contractor's obligation to complete the construction contract. The group will complete a review of the four houses to document the completed items and work remaining to be completed as soon as possible.
- ❖ 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 and foundation walls at several lots. The authority/architect has not received the revised construction schedule from the contractor that was previously requested.
- ❖ 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 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

November 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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- 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-nine of the one hundred ninety-seven units are currently occupied / 91% occupied.
- Phase II: One hundred seventy-six of the available one hundred ninety-eight are currently occupied / 89% occupied.
- Phase III: Seventy-three of the available seventy-six units are currently occupied / 96% occupied.

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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.

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 Park Board accepted our request to make a presentation at their October 1st 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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E Approvals Status

None pending

F Project Related Meetings

November 10

Birmingham Parks & Recreation Marconi Park Coordination Meeting

November 17

HABD Board of Commissioners Meeting:

G Document Submissions and Notices

- o October 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. Clarification of and receipt from the City of Birmingham, remaining financial commitments towards the infrastructure implementation.
- vi. HOPE VI Grant closure process.

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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 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 10th 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 11th, 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 17th Board meeting for this cycle of credits. The Developer has submitted an out-of-cycle application for tax credits and has been 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 51% complete, NTP issued June 15, 2008, 357 day construction services contract.

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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Building 1

Stairs and railing in the breezeways has been completed, exterior hardie siding, trim and siding has begun, masonry installation has begun, plumbing & sprinkler rough-ins are in progress.

Building 2

Roofing shingle work has been completed; framing of the breezeways is progressing as well as plumbing rough-in services.

Building 3

Framing of walls and roofing has been completed as well as the roof decking and exterior sheathing and stairs and railings in the breezeways are being installed.

Building 4

Framing for the upper level floors & roof decks have been installed, stairs and railings in the breezeways are being installed.

Building 5

Framing for the upper level floors & roof decks have been installed.

Management Building

Plumbing, electrical & mechanical inspections have been completed and interior drywall has been installed.

2. Payment Applications:

GAO – Payment Application 6

C Project Related Meetings

November 11

Oxmoor – Bi-Weekly Construction Status Meeting

November 17

HABD Board of Commissioners Meeting:

November 25

Oxmoor – Bi-Weekly Construction Status Meeting

D Document Submissions and Notices

GAO – Payment Application 6

GAO – Certified Payrolls

E Key Project Issues

i. Phase I - AHFA Tax Credit Award resubmissions

ii. Phase I – Construction Services

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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.

- GAO – Payment Application 6

SECTION 5
APPENDIX

- SITE; UPDATE PHOTOS

- IMS WEEKLY REPORT; PARK PLACE PHASE I, 01 December 2008

- IMS WEEKLY REPORT; PARK PLACE PHASE II, 01 December 2008

- IMS WEEKLY REPORT; PARK PLACE PHASE III, 01 December 2008

- KEY PROJECT ACTIVITIES SCHEDULE, updated to 30 November 2008.

- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 30 November 2008.