

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
September 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

October 2, 2007

PARK PLACE
GLENBROOK AT OXMOOR

**HOUSING AUTHORITY
of the BIRMINGHAM DISTRICT**

**PROGRESS REPORT No. 87
September 2007**

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SECTION 1
STATUS REPORTS

I. HOME OWNERSHIP PROGRAM

September 2007

In Mason City, a four house construction procurement with BRIC construction providing services had a contract executed in August 2007. BRIC has begun services; foundation work is currently in progress. A second sixteen (16) house construction solicitation package IFB, received seven responses in early October. A recommended contractor resolution is to be presented at the October HABD Board of Commissioners monthly meeting. HABD staff is also in the process of identifying an additional six to ten lots for a third construction phase.

In Southhampton, all of the houses have been certified as substantially complete and City of Birmingham Certificates Of Occupancy has been issued. Seven closings have occurred to date the remaining houses have contracts that are currently being processed.

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

September 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 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 - 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;**
 - 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
- vii. **Phase III – 76 Unit Mid-Rise Building Construction;**
 - 1. **Construction Progress** –0% complete, Capstone Construction is the contractor building this facility. MGD issued the Notice to Proceed after permitting issues had been remedied with the City and the Building Permit was issued. The planned construction duration is two hundred seventy days (270) days and the NTP was issued on October 1, 2007.
 - 2. **Payment Applications:**
None submitted during this reporting period.

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.

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Occupied Units:

Phase I: One hundred eighty-two, of the one hundred ninety-seven units are currently occupied (92% occupied).

Phase II: One hundred eighty-eight, of the available one hundred ninety-eight are currently occupied (95% 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 planned. The closing for this phase occurred in mid-September and a preliminary Notice to Proceed was issued to the contractor, Capstone construction on September 17, 2007.

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' Development.
- iii. Coordination via the non-profit Carraway CDC, with City of Birmingham Parks and Recreation Department, and vicinity entities regarding Marconi Park.
- iv. Property Management services, including marketing, maintenance and coordination/interaction with residents.

F Approvals Status

Phase III Closing - Approved

G Project Related Meetings

- September 5
HABD HOPE VI Progress Review Meeting
- September 7
Phase III Closing – Conference Call
- September 17
HABD Board of Commissioners Meeting:
- September 19
HABD HOPE VI Progress Review Meeting

H Document Submissions and Notices

- o August Progress Report submitted to HABD by PMT.

I Key Project Issues

- i. Phase 3 Mid-Rise Project – Construction Services Phase
- ii. Home Ownership Program
- iii. Block 'A' & Block 'B' North conceptual design coordination.
- iv. Community Center Programming Coordination
- v. Marconi Park Planning Process w/ City of Birmingham
- vi. 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

September 2007

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 earlier this year. Based upon preliminary feedback from the AHFA, the application was withdrawn. In September the Developer submitted an enhanced application in advance of the October AHFA Board meeting.

The Developer is continuing to refine the modified Master Plan, and prepare for an anticipated closing.

A Project Related Meetings

September 5

HABD HOPE VI Progress Review Meeting

September 17

HABD Board of Commissioners Meeting:

September 19

HABD HOPE VI Progress Review Meeting

B Document Submissions and Notices

- o AHFA Out-of-Cycle Tax Credit Application

C Key Project Issues

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

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SECTION 3
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.

- No payment applications submitted.

SECTION 4
APPENDIX

- HUD HOPE VI REVITALIZATION GRANT PROGRAM: FINANCIAL SUMMARY REPORT, reporting period; 2nd Quarter, Calendar Year 2007
- SITE UPDATE PHOTOS.
- IMS WEEKLY REPORT; PARK PLACE PHASE I, 30 September 2007
- IMS WEEKLY REPORT; PARK PLACE PHASE II, 30 September 2007
- KEY PROJECT ACTIVITIES SCHEDULE, updated to 30 September 2007.
- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 30 September 2007.

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PARK PLACE - BLOCK 'B' NORTH

Rendering of Proposed 76-Unit 4 Story Mid-Rise Building
Intersection of 22nd Street and Park Place, looking NorthEast

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PARK PLACE - BLOCK 'B' NORTH
Site Clearing/Cleaning in Prep for Construction of Mid-Rise Building

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PARK PLACE - BLOCK 'B' NORTH
Site Clearing/Cleaning in Prep for Construction of Mid-Rise Building

OCCUPANCY REPORT

Week Ending:

09/30/07

Property Name:

Park Place Apartments Phase I

UNITS			VACANT UNITS	VACANT UNITS	ON NOTICE	ON NOTICE	AVAILABLE FOR LEASE		OCCUPANCY			MOVE-INS/MOVE-OUTS			
TOTAL UNITS	UNDER CONSTR.	RENTABLE UNITS	TOTAL	PRE-LEASED		PRE-LEASED	UNITS	AVAIL. %	LAST WEEK	THIS WEEK	OCC %	MOVE INS	MOVE OUTS	NET	
			+	-		+	=								
PROGRAMS															
Authority Assisted Units	87	0	87	1	0	2	0	3	3%	83	86	99%	3	0	3
Affordable Units	40	0	40	2	1	0	0	1	3%	34	38	95%	4	0	4
Market Units	70	0	70	12	0	3	0	15	21%	52	58	83%	6	0	6
SUMMARY	197	0	197	15	1	5	0	19	10%	169	182	92%	13	0	13

TRAFFIC/RENTALS

	Waiting List	Traffic	Appl.	Denials	Unqualified	Net Appl.	Appl. Approved	Appl. Pending
Authority Assisted Units	321	1	1	0	0	1	0	0
Returning Resident List	0	0	0	0	0	0	0	0
Affordable Units	0	6	5	0	1	0	4	0
Market Units	0	5	4	0	0	0	4	0
Section 8 Voucher	0	0	0	0	0	0	0	0
SUMMARY	321	12	10	0	1	1	8	0

Prepared by: Rebecca Arthur

Property Manager: Sheryl Stoffregen

Regional Manager: Parris Woods

OCCUPANCY REPORT

Week Ending:

09/30/07

Property Name:

Park Place Apartment Phase II

UNITS			VACANT UNITS	VACANT UNITS	ON NOTICE	ON NOTICE	AVAILABLE FOR LEASE		OCCUPANCY			MOVE-INS/MOVE-OUTS			
TOTAL UNITS	UNDER CONSTR.	RENTABLE UNITS	TOTAL	PRE-LEASED		PRE-LEASED	UNITS	AVAIL. %	LAST WEEK	THIS WEEK	OCC %	MOVE INS	MOVE OUTS	NET	
			+	-		+	=								
PROGRAMS															
Authority Assisted Units	85	0	85	1	0	0	0	1	1%	81	84	99%	3	0	3
Affordable Units	35	0	35	7	0	0	0	7	20%	15	28	80%	13	0	13
Market Units	78	0	78	2	0	1	0	3	4%	63	76	97%	13	0	13
SUMMARY	198	0	198	10	0	1	0	11	6%	159	188	95%	29	0	29

TRAFFIC/RENTALS

	Waiting List	Traffic	Appl.	Denials	Unqualified	Net Appl.	Appl. Approved	Appl. Pending
Authority Assisted Units	487	3	3	0	3	0	0	0
Returning Resident List	0	0	0	0	0	0	0	0
Affordable Units	0	15	13	3	0	0	10	0
Market Units	0	14	13	2	0	0	11	0
Section 8 Voucher	0	0	0	0	0	0	0	0
SUMMARY	487	32	29	5	3	0	21	0

Prepared by: Rebecca Arthur

Property Manager: Sheryl Stroffegen

Regional Manager: Parris Woods