

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
September 2008

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October 2, 2008

PARK PLACE
GLENBROOK AT OXMOOR

**HOUSING AUTHORITY
of the BIRMINGHAM DISTRICT**

**PROGRESS REPORT No. 99
September 2008**

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SECTION 1 EXECUTIVE SUMMARY

PROJECT PROGRESS OVERVIEW

Mason City,

- Phase B, a sixteen (16) house construction solicitation IFB was issued and KSH was the recommended contractor to be awarded this contract. The contractor is revising his schedule due to delays in the installation of the footings and foundation walls.

- **Property Management Recap**

Occupied Units:

Phase I: One hundred eight-eight of the one hundred ninety-seven units are currently occupied / 95% occupied.

Phase II: One hundred eight-seven, of the available one hundred ninety-eight are currently occupied / 92% occupied.

Phase III: Fifty-six of the available seventy-six units are currently occupied / 74% occupied. The Property Manager reports that with the exception of 5 units, all other units have been pre-leased.

Note: The 74% is the number of moved-in at the time of this report.

Marconi 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.

The Park Board suggested that a committee be established to determine a best future usage and programming for the Park. We have formally expressed to the Park Board a desire to participate in this planning process and are currently awaiting their response.

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 23% complete,
- **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.

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SECTION 2 STATUS REPORTS

I. HOME OWNERSHIP PROGRAM

September 2008

In Mason City, three separate initiatives are in progress;

- ❖ Phase A, a four 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 is currently pursuing a remedy regarding this contractor due to lack of substantial progress, as the project is now several weeks behind schedule.
- ❖ 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 site clearing and grading on several lots. The contractor is revising his schedule due to delays in the installation of the footings and foundation walls.
- ❖ Phase C, is the identification of an additional six to ten lots by HABD staff, for a third construction phase. The staff is currently verifying ownership criteria; property appraisals have been received and offers are being made to property owners.

In Southhampton, all of the houses have been certified as substantially complete and City of Birmingham Certificates Of Occupancy have been issued. All nine houses have closed.

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 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.

1. Payment Applications:

Park Place Phase III, Construction Payment Application No. 12.

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 eight-eight of the one hundred ninety-seven units are currently occupied / 95% occupied.

Phase II: One hundred eight-seven, of the available one hundred ninety-eight are currently occupied / 92% occupied.

Phase III: Fifty-six of the available seventy-six units are currently occupied / 74% occupied. The Property Manager reports that with the exception of 5 units, all other units have been pre-leased.

Note: The 74% is the number of moved-in at the time of this report.

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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.

The Park Board suggested that a committee be established to determine a best future usage and programming for the Park. We have formally expressed to the Park Board a desire to participate in this planning process and are currently awaiting their response.

E Approvals Status

Approval of Budget Revision No. 7 by HUD on September 22nd.

F Project Related Meetings

September 15

HABD Board of Commissioners Meeting:

September 19

Park Place Phase – PIC Concerns Meeting

September 26

Park Place – Pre Park Board Meeting, Coordination Conference Call

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G Document Submissions and Notices

- August Progress Report submitted to HABD by PMT.
- Park Place Phase III, As-Built's
- Park Place Phase III, Construction Payment Application No. 12

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.

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.

A Approvals Status

None pending

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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 23% 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.

Building 1

The slab for the lower level has been poured, the upper level slab is to be poured in early October, with framing to commence shortly thereafter.

Building 2

Underground utility rough-ins and slab prep / pour activities for the upper slab has been completed. The upper slab is expected to be poured in early October.

Building 3

Backfill at the basement wall has been completed with the plumbing underground rough-ins to be completed in early October with the upper slab pour scheduled for mid-October.

Building 4

Backfill at the basement wall has been completed with the plumbing underground rough-ins to be completed in early October with the upper slab pour scheduled for mid-October.

Building 5

The lower level slab pour has been completed.

Management Building

Framing for the building as well as roofing felt installations have been completed. Exterior wall wrap and window installation are to begin in early October.

2. Payment Applications:

- GAO – Payment Application 2
- GAO – Payment Application 3
- GAO – Payment Application 4

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C Project Related Meetings

- September 02
 - Oxmoor – Bi-Weekly Construction Status Meeting
- September 15
 - HABD Board of Commissioners Meeting:
- September 16
 - Oxmoor – Bi-Weekly Construction Status Meeting
- September 30
 - Oxmoor – Bi-Weekly Construction Status Meeting

D Document Submissions and Notices

- Glenbrook at Oxmoor Capstone Progress Report
- GAO – Payment Application 2
- GAO – Payment Application 3
- GAO – Payment Application 4

E Key Project Issues

- i. Phase I - AHFA Tax Credit Award submissions
- 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.

- Park Place Phase III, Construction Payment Application No. 12
- GAO – Payment Application 2
- GAO – Payment Application 3
- GAO – Payment Application 4

SECTION 5
APPENDIX

- SITE; UPDATE PHOTOS

- IMS WEEKLY REPORT; PARK PLACE PHASE I, 29 September 2008

- IMS WEEKLY REPORT; PARK PLACE PHASE II, 29 September 2008

- IMS WEEKLY REPORT; PARK PLACE PHASE III, 29 September 2008

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

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