

**HOUSING AUTHORITY of the BIRMINGHAM DISTRICT**

**METROPOLITAN GARDENS**  
**HOPE VI GRANT PROGRAM**

**PROGRESS REPORT**  
**August 2007**

Program Managers \_\_\_\_\_

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September 4, 2007

# PARK PLACE OFF-SITE DEVELOPMENT

HOUSING AUTHORITY  
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PROGRESS REPORT No. 86  
August 2007

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## SECTION 1 STATUS REPORTS

### I. HOME OWNERSHIP PROGRAM

*August 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 11<sup>th</sup>, with five bids received at the April 27<sup>th</sup>, bid opening. A recommended contractor, BRIC Inc. was approved by the HABD Board of Commissioners and their contract has been prepared and is fully executed. The notice to proceed to commence construction services has been issued.

In Southhampton, all of the houses have been certified as substantially complete and City of Birmingham Certificates Of Occupancy 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

*August 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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SECTION 1  
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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 forty, of the available one hundred ninety-eight are currently occupied (71% occupied). An additional application has an approval 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 a closing. The Developer has completed negotiating contract terms with the proposed General Contractor and a contract has been executed. Based upon the negotiations with the General Contractor, resubmittal of the Rental Term Sheet and Evidentiary Documents to HUD was required and completed. HUD has unofficially approved this phase to close. The HUD approval letter is expected in order to close in mid September.

**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

**G Project Related Meetings**

August 8  
HABD HOPE VI Progress Review Meeting  
August 20  
HABD Board of Commissioners Meeting:

**H Document Submissions and Notices**

- o July Progress Report submitted to HABD by PMT.
- o IMS Marketing Report

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SECTION 1  
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**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**

*August 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 23<sup>rd</sup>. 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. The Developer is now planning to resubmit an enhanced application in advance of the October AHFA Board meeting.

The Developer is continuing to refine the modified Master Plan, they have submitted revised preliminary site and building plans and they are also reviewing/updating the project budget.

**A Project Related Meetings**

August 8

HABD HOPE VI Progress Review Meeting

August 20

HABD Board of Commissioners Meeting:

August 29

AHFA Submittal Status Conference Call

**B Document Submissions and Notices**

- o Pre-Development Loan Agreement – Executed
- o Pre-Development Loan – Payment Application No.1

**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.

- Glenbrook at Oxmoor – Pre-Development Loan; Payment Application No. 1.

SECTION 4  
APPENDIX

- IMS WEEKLY REPORT; PARK PLACE PHASE I, 02 September 2007
- IMS WEEKLY REPORT; PARK PLACE PHASE II, 02 September 2007
- CARRAWAY CDC – Letter sent to City of Birmingham regarding Marconi Park  
City Response Letter
- KEY PROJECT ACTIVITIES SCHEDULE, updated to 31 August 2007.
- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 31 August 2007.

**OCCUPANCY REPORT**

Week Ending:

09/02/07

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	
			+	-		+	=								
<b>PROGRAMS</b>															
Authority Assisted Units	87	0	87	4	0	2	0	6	7%	84	83	95%	1	2	-1
Affordable Units	40	0	40	8	3	0	0	5	13%	33	32	80%	0	1	-1
Market Units	70	0	70	19	2	5	0	22	31%	54	51	73%	1	4	-3
<b>SUMMARY</b>	<b>197</b>	<b>0</b>	<b>197</b>	<b>31</b>	<b>5</b>	<b>7</b>	<b>0</b>	<b>33</b>	<b>17%</b>	<b>171</b>	<b>166</b>	<b>84%</b>	<b>2</b>	<b>7</b>	<b>-5</b>

**TRAFFIC/RENTALS**

	Waiting List	Traffic	Appl.	Denials	Unqualified	Net Appl.	Appl. Approved	Appl. Pending
Authority Assisted Units	321	0	0	0	0	0	0	0
Returning Resident List	0	0	0	0	0	0	0	0
Affordable Units	0	4	4	2	0	2	0	0
Market Units	0	2	1	0	0	0	0	0
Section 8 Voucher	0	0	0	0	0	0	0	0
<b>SUMMARY</b>	<b>321</b>	<b>6</b>	<b>5</b>	<b>2</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>

Prepared by: Rebecca Arthur

Property Manager: Sheryl Stoffregen

Regional Manager: Parris Woods

**OCCUPANCY REPORT**

Week Ending:

09/02/07

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	
			+	-		+	=								
<b>PROGRAMS</b>															
Authority Assisted Units	85	0	85	11	9	0	0	2	2%	69	74	87%	4	0	4
Affordable Units	35	0	35	26	4	0	0	22	63%	8	9	26%	3	1	2
Market Units	78	0	78	21	0	0	0	21	27%	57	57	73%	3	3	0
<b>SUMMARY</b>	<b>198</b>	<b>0</b>	<b>198</b>	<b>58</b>	<b>13</b>	<b>0</b>	<b>0</b>	<b>45</b>	<b>23%</b>	<b>134</b>	<b>140</b>	<b>71%</b>	<b>10</b>	<b>4</b>	<b>6</b>

**TRAFFIC/RENTALS**

	Waiting List	Traffic	Appl.	Denials	Unqualified	Net Appl.	Appl. Approved	Appl. Pending
Authority Assisted Units	487	5	0	0	5	0	0	0
Returning Resident List	0	0	0	0	0	0	0	0
Affordable Units	0	12	8	0	1	0	6	1
Market Units	0	5	1	0	0	1	1	0
Section 8 Voucher	0	0	0	0	0	0	0	0
<b>SUMMARY</b>	<b>487</b>	<b>17</b>	<b>9</b>	<b>0</b>	<b>6</b>	<b>0</b>	<b>7</b>	<b>1</b>

Prepared by: Rebecca Arthur

Property Manager: Sheryl Stroffegen

Regional Manager: Eddy Clayton