

HOUSING AUTHORITY of the BIRMINGHAM DISTRICT

METROPOLITAN GARDENS
HOPE VI GRANT PROGRAM

PROGRESS REPORT
July 2008

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

August 2, 2008

PARK PLACE
GLENBROOK AT OXMOOR

HOUSING AUTHORITY
of the BIRMINGHAM DISTRICT

PROGRESS REPORT No. 97
July 2008

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SECTION 1 EXECUTIVE SUMMARY

PROJECT PROGRESS OVERVIEW

Mason City,

- 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.

Park Place

- **Phase III – 76 Unit Mid-Rise Building Construction;**
Construction Progress – 100% complete, The contractor has now completed all construction related services and is completing the punch list items and any items necessary per the City inspectors to receive a Certificate of Occupancy for the building.
- **Property Management Recap**
Phase I: One hundred eight-eight of the one hundred ninety-seven units are currently occupied / 95% occupied.
Phase II: One hundred eight-eight, of the available one hundred ninety-two are currently occupied / 95% occupied.
- **Document Submissions and Notices**
 - June Progress Report submitted to HABD by PMT.
 - Park Place Phase II, Construction Payment Application No. 24
 - Park Place Phase II, Construction Payment Application No. 25
 - Park Place Phase III, Construction Payment Application No. 10

Glenbrook at Oxmoor

- **Phase I**
 - **Project Construction Progress**
Phase I - New Rental Units Construction;
 - **Construction Progress** – 5% complete, NTP issued June 15, 2008, 357 day construction services contract. Contractor reports 10.2% MBE/WBE participation per contracts executed as of June 30th.
- **Phase II**
 - the AHFA Board denied award of tax credits at the June 17th Board meeting for this cycle of credits. The Developer plans to pursue an out-of-cycle application for tax credits.
- **Document Submissions and Notices**
 - Glenbrook at Oxmoor Phase I, Construction Payment Application No. 1

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SECTION 2 STATUS REPORTS

I. HOME OWNERSHIP PROGRAM

July 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 is currently scheduled to be completed June 30, 2008, construction services are 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 schedule of values has been submitted by the contractor.
- ❖ 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

July 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 - 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. Close-out and HABD final payments have been processed. Final Endorsement closing with FHA occurred on July 17, 2008.
2. **Payment Applications:**
Final retainage release payment application; payment application no. 24 & 25.
- vii. **Phase III – 76 Unit Mid-Rise Building Construction;**
1. **Construction Progress** – 100% complete, Capstone Construction is the contractor building this facility. The planned construction duration is 270 days and the NTP was issued on October 1, 2007.

The contractor has now completed all construction related services and is completing the punch list items and any items necessary per the City inspectors to receive a Certificate of Occupancy for the building.
2. **Payment Applications:**
Park Place Phase III, Construction Payment Application No. 10.

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 and phase II, one hundred ninety-eight units 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.

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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-eight, of the available one hundred ninety-two are currently occupied / 95% occupied.

Regarding the Phase III Mid-Rise, the Property Manager plans to populate this facility from the waiting list developed in association with the two rental phases.

D Developer Work in Progress

MGD is currently focused on the following activities:

- i. Phase III Block 'A' Development.
- ii. Coordination via the non-profit Carraway CDC, 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.

E Approvals Status

None Pending

F Project Related Meetings

July 09

Park Place III – Punch List Walk Thru

July 21

HABD Board of Commissioners Meeting:

July 23

HABD HOPE VI Progress Review Meeting

G Document Submissions and Notices

- o June Progress Report submitted to HABD by PMT.
- o Park Place Phase II, Construction Payment Application No. 24
- o Park Place Phase II, Construction Payment Application No. 25
- o Park Place Phase III, Construction Payment Application No. 10

H Key Project Issues

- i. Home Ownership Program
- ii. Block 'A' & Block 'B' North conceptual design coordination.
- iii. Community Center Programming Coordination
- iv. Marconi Park Planning Process w/ City of Birmingham, ONB and Community Neighbors
- v. Clarification of and receipt from the City of Birmingham, remaining financial commitments towards the infrastructure implementation.

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SECTION 3
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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.

The Developer submitted the Site Acquisition Proposal that was forwarded to HUD for approval. A revised budget has been submitted by the Developer and is being reviewed and the developer is continuing to submit appropriate documentation to AHFA, as they precede towards a Phase I closing. 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 plans to pursue an out-of-cycle application for tax credits.

A Approvals Status

None pending

B Project Construction Progress

i. Phase I - New Rental Units Construction;

- 1. Construction Progress** – 5% complete, NTP issued June 15, 2008, 357 day construction services contract. Contractor reports 10.2% MBE/WBE participation per contracts executed as of June 30th.

The site has been cleared of trees and underground utilities are being installed.

- 2. Payment Applications:**

Glenbrook at Oxmoor Phase I, Construction Payment Application No. 1

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C Project Related Meetings

July 08

Oxmoor – Pre-Construction Conference

July 21

HABD Board of Commissioners Meeting:

July 22

Oxmoor – Bi-Weekly Construction Status Meeting

July 23

HABD HOPE VI Progress Review Meeting

D Document Submissions and Notices

None Pending

E Key Project Issues

- i. Phase I - AHFA Tax Credit Award submissions
- ii. Phase I – Construction Services
- iii. Phase II – AHFA Tax Credit Application – Re-Application

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SECTION 4
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.

- Park Place Phase II, Construction Payment Application No. 24
- Park Place Phase II, Construction Payment Application No. 25
- Park Place Phase III, Construction Payment Application No. 10
- Glenbrook at Oxmoor Phase I, Construction Payment Application No. 1

SECTION 5
APPENDIX

- SITE; UPDATE PHOTOS
- IMS WEEKLY REPORT; PARK PLACE PHASE I, 28 July 2008
- IMS WEEKLY REPORT; PARK PLACE PHASE II, 28 July 2008
- KEY PROJECT ACTIVITIES SCHEDULE, updated to 31 July 2008.
- 60-DAY WORK IN PROGRESS SCHEDULE, updated to 31 July 2008.