UPPER TOWNSHIP Affordable Housing Annual Report for the Period Ending December 31, 2021

June 2022

Township of Upper 2100 Tuckahoe Road Petersburg, NJ 08270 609-628-2011

PREPARED BY:





1. GENERAL INFORMATION AND TRUST FUNI	D MONITORING
MUNICIPALITY NAME:	Upper Township
COUNTY:	Cape May
Date through which funds reported:	31-Dec-21
Name of person filling out form and affiliation/role:	Kathy Packcowski, Senior Associate, Traid Associated
Date of filling out form:	6/20/2022
Email:	kpackowski@triadincorporated.com
Municipal Housing Liaison for municipality:	Paul Dietrich, PE, PP, CME, CPWM, CFM, Municipal Engineer
Email:	pdietrich@uppertownship.com
Income Limits Year Being Used by Municipality*:	2020

TRUST FUND INFORMATION

	Inception - December 31, 2019	January 1, 2020 to June 31, 2020	July 1, 2020 to December 31, 2021	Total
REVENUE SUMMARY				
Barrier Free Escrow	\$ -			\$0
Development Fees	\$ 1,362,460	\$ 87,828	\$254,712.50	\$1,705,000.00
Interest Earned	\$ 31,807	\$ 10,288	\$36,457.99	
Other Income	\$ 19,949	\$ -		\$19,949.00
Payments-in-Lieu of Construction	\$ 149,362			\$149,362.14
TOTAL	\$ 1,563,578	\$ 98,116	\$291,170.49	\$1,952,864.10
EXPENDITURE SUMMARY				
Administration**	\$ 55,890	\$ 1,500	\$7,938.94	\$65,328.94
Affordability Assistance***	\$ -	\$ -	\$16,016.00	\$16,016.00
Very Low-Income Affordability Assistance	\$ -		+	\$0.00
Barrier Free Conversions	\$ -			\$0.00
Housing Activity	\$ -		\$16,700.00	\$16,700.00
TOTAL	\$ 55,890	\$ 1,500		\$98,044.94
ADMINISTRATION: January 1, 2020 to Present				
Name	List types of administrative expenses	Amount		
Triad	Update Affodability Assistance Manual	\$1,500.00) \$7,938.94	
Other Administration (Legal/Planning)				
TOTAL	·	\$1,500	\$7,938.94	
AFFORDABILITY ASSISTANCE: January 1, 2020 to	o Present			
Name	List affordability assistance projects and programs	Amount		
131 Reding Ave	Emergency Affordability Assistance (roof)		\$8,525.00	
2140 Rt-50	Emergency Affordability Assistance (heat)		\$7,491.00	
TOTAL		\$0	\$16,016.00	
HOUSING ACTIVITY: January 1, 2020 to Present				
Type of Housing Activity	Specific Site or Program	Amount		
Well & Septic	Habitat for Humanity		\$16,700.00	
]
]
TOTAL		\$0		
Comments:			Balance as of 12/31/21	\$1,854,819.16

*View 2020 income limits: https://ahpnj.org/member_docs/Income_Limits_2020.pdf

https://ahpnj.org/member_docs/Income_Limits_2019_FINAL.pdf

https://ahpnj.org/member_docs/Income_Limits_2018.pdf

https://ahpnj.org/member_docs/Income_Limits_2017.pdf

**Administrative expenses cannot total more than 20% of collected revenues, less any Administrative expenses already disbursed.

***Affordability Assistance must equal at least 30% of revenues collected after July 2008, with one-third of that dedicated to very low-income Affordability Assistance

2. REHABILITATION

Total Third Round rehabiltation obligation	14
Rehabilitation program administrator(s) with email, phone number, and address: (if multiple rehab programs list administrator for each)	Triad Associates, 1301 W. Forest Grove Road, Vineland, NJ 08360; 856-690-9590; bmingey@triadincorporated.com
Period of time covered (Only completed rehabs since either the adoption of the	
Housing Element and Fair Share Plan or the previous annual report should be	
included on this sheet):	1999-2025

Please list below all units rehabilitated towards the municipality's Third Round rehabilitation obligation.

Flease list below all units reliabilitated towards the municipality s	2							3		4	5	7	8	9	10	11	12	13
Street Address	Case Number (if applicable)	Rehab program used (e.g. county rogram, municipal rental rehab)	Block	Lot	Unit Number	Owner	Renter	Very Low	Low	Modera Final Inspection te Date (mm/dd/yy)	Funds expended or hard costs (\$)	Funds recaptured	Major system(s) repaired	Was unit below code and raised to code? (Y/N)	Effective date of affordability controls (mm/dd/yy)	Length of affordability controls (years)	Affordability control removed (Y/N)	Creditworthy (Y/N)
See Attached																		
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Comments:

Verification by Program Administrator that all households are income eligible, that appropriate affordability controls are in place and that rental prices conform to COAH regulations.

Program Administrator

Date

Code Official

Date

Verification by Building Code Official that units were below code and raised to code per the NJ State Housing Code or the Rehabiliation Subcode and that the work involved major systems

Council on Affordable Housing Unit Information - Rehabilitation

UPPER TWP,CAPE MAY

Project Name: Rehabilitation Program -- Project ID : 14374

Unit Address	Blk/Lot/ Qual/Unit	Final Inspection Date	Funds Expended on Hard Costs	Develop- ment Fees Expended	Funds Re- Captured	Effect. Date of Affordability Controls	Per- petual Lien	Length of Afford- ability Controls	Date Afford- ability Controls Removed	Complete /Credit worthy	d Major System Repaired	Unit Categories	Unit Flags
1023 S. Shore Rd	B: 575-; L: 30-; Q: ; Unit:	10/09/12	\$0.00	\$20,000.00	\$0.00	02/13/13	Ν	0		,	Plumbing/Wells Roof Veatherization (Insulation, Siding, Windows/Door)		
12 E. Mapleshade Lan	ne B: 674-; L: 5-; Q: ; Unit:	05/13/13	\$0.00	\$19,950.00	\$0.00	01/06/14	Ν	0			Roof Veatherization (Insulation, Siding, Vindows/Door)		
1340 Stagecoach Rd	B: 549-; L: 50-; Q: ; Unit:	10/26/12	\$0.00	\$20,000.00	\$0.00	02/13/13	Ν	Ο			Heating Veatherization (Insulation, Siding, Vindows/Door)		
1460 Stagecoach Rd	B: 551-; L: 24-; Q: ; Unit:	12/27/14	\$0.00	\$19,515.00	\$0.00	04/15/15	Ν	0		1/1	Electrical Heating		
1590 Weatherby Rd	B: 8-; L: 1-; Q: ; Unit:	03/18/15	\$0.00	\$20,000.00	\$0.00	04/15/15	Ν	0		,	Plumbing/Wells Roof Veatherization (Insulation, Siding, Vindows/Door)		
621 S. Shore Rd	B: 567-; L: 37-; Q: ; Unit: 183	12/12/12	\$0.00	\$20,000.00	\$0.00	02/13/13	N	0		1/1	Roof Veatherization (Insulation,		

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632 US Rt-9	B: 565-03; L: 76- ; Q: ; Unit:	05/13/13	\$0.00	\$18,535.00	\$0.00	01/06/14	Ν	0		1/1	Electrical Roof		
191 Mill Rd	B: 26-; L: 82-; Q: ; Unit:	08/16/12	\$0.00	\$19,921.00	\$0.00	02/13/13	Ν	0		1/1 P	lumbing/Wells Roof		
21 Oak St	B: 643-; L: 16-; Q: ; Unit:	12/12/12	\$0.00	\$19,075.00	\$0.00	01/06/14	Ν	0			Heating Roof /eatherization (Insulation, Siding, /indows/Door)		
4 S. Frances Dr	B: 471-; L: 8-; Q: ; Unit:	08/16/12	\$0.00	\$20,000.00	\$0.00	02/13/13	Ν	0		v	Electrical lumbing/Wells Roof /eatherization (Insulation, Siding, /indows/Door)		
320 Mill Rd	B: 31-; L: 72-; Q: ; Unit:	02/13/13	\$0.00	\$19,885.00	\$0.00	01/06/14	Ν	0		V	lumbing/Wells /eatherization (Insulation, Siding, /indows/Door)		
1 Delores Ave	B: 596-; L: 11-; Q: ; Unit:	03/14/14	\$0.00	\$20,000.00	\$0.00	04/15/15	Ν	0			Roof /eatherization (Insulation, Siding,		

Council on Affordable Housing Unit Information - Rehabilitation

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Unit Address	Blk/Lot/ Qual/Unit	Final Inspection Date	Funds Expended on Hard Costs	Develop- ment Fees Expended	Funds Re- Captured	Effect. Date of Affordability Controls	Per- petual Lien	Length of Afford- ability Controls	Date Afford- ability Controls Removed	Complete /Credit worthy	d Major System Repaired	Unit Categories	Unit Flags
45 Hope Corson Rd	B: 565-05; L: 6-; Q: ; Unit:	03/01/13	\$0.00	\$19,369.00	\$0.00	01/06/14	Ν	Ο			Electrical Heating Roof /eatherization (Insulation, Siding, /indows/Door)		
527 US Rt-9 No	B: 693-; L: 1-; Q: ; Unit:	10/26/12	\$0.00	\$19,765.00	\$0.00	02/13/13	Ν	0			Electrical Roof /eatherization (Insulation, Siding, /indows/Door)		
Total Units 14			Total Hard Costs \$0.00	Total Development Fees Expended \$276,015.00	Total Funds Recaptur \$0.	red				Total Completec Credit Wort 14 / 14	hy		

3. PRIOR AND THIRD ROUND MONITORING																
Cite / Deserver News	0 Faultaneursh Daard	21.0	Hally Dame	Heritage Acres Mobile Home Park	Osprey Cove/2058 South Shore Road	Habitat fan Humanitu	Linking for the second	Habitat fan Humanitu	Habitat fan Humanita	y Market to Affordable	Hidden Pond	Heritage Links	Stagecoach Road Senior		2201 Pt 50	G2 - MTCD Inclusionary
	8 Foxborough Road ResCare of NJ	21 Ocean Ave Habitat for Humanity	Holly Berry Holly Berry, LLC	Park, LLC	2058 South Shore Road LLC	Habitat for Humanity	Habitat for Humanity Habitat for Humanity		Habitat for Humanity	y Warket to Affordable	Hidden Pond	Heritage Links	Housing	Marmora Town Center	2291 Rt 50	G2 - MICD Inclusionary G2 Ventures
Compliance Mechanism:	Support and Special Needs	100% Affordable	100% Affordable	Inclusionary Zoning	Inclusionary Zoning	100% Affordable	100% Affordable	100% Affordable	100% Affordable	100% Affordable	Inclusionary	Inclusionary	100% Affordable - Senior	Inclusionary	100% Affordable	Inclusionary
Compliance Mechanism #2 (if project has multiple):																
Round: Block (if multiple separate by commas):	Prior Round	Prior Round 62	Prior Round	Prior Round 453 63	Prior Round	Prior Round 7 52	Prior Round	Prior Round	Prior Round	Prior Round	Third Round 350 5	Third Round 59 51	Third Round	Third Round	Third Round 34	Third Round 8 600
Lot (if multiple separate by commas):		19 13-28	182	.03 15.01, 15.02	2	8 1	2 2	2	1	2	9 36.01, 37, 39		01 87,102, 103		2	5 3
						41 Redwood Ave.Two lots transferred to Habitat in	42 Redwoood Ave.Two lot transferred to Habitat in	S								
						December 5, 2018 (Ord. 05	- December 5, 2018 (Ord. 05	5- Two lots authorized to be								
					Route 9 and Route 50; Nine (9) units along Harriet Lane (2, 4, 6, 8		2018) and restrictive deed have been filed - 41	s transferred to Habitat on December 9, 2019 (Ord. 19								
					10, 12, 14, 16 & 18 Harriet Lane);		Redwood Ave, Marmora	2019) - 103 E. Ocean Ave								
	9 Foxborough Road, Ocean View, I		94 Route 50, Unit #4, Seaville, I		One unit located at 1729 South	and 43 Redwood Ave,	and 43 Redwood Ave,	and 104 E. Ocean Ave,	and 104 E. Ocean Ave,							206 Rt-US9 South (Unit 1 and
Address:	08230	21 Ocean Ave, Marmora, NJ	08230	Tuckahoe Road	Shore Road	Marmora, NJ and .	Marmora, NJ and .	Palermo	Palermo	Unit 1: 2140 Rt 50	3017 and 3023 Rt. 9 South	1357 Route 9 South, Palerm	0		2291 Route 50	2)
Construction required to begin by (for mechanisms																
other than inclusionary development):																
								Approved and Under	Approved and Under							
Status:	Complete	Complete	Complete	Approved and Under Construction	on Approved and Under Constructio	n Complete	Complete	Construction	Construction	1 Unit Complete; 4 in progress	Approved not built	Approved not built	Proposed	Approved not built	Complete	Complete
If project has site plan /or subdivision approval, date																
building permits received (DD/MM/YYY):																
If "approved not built" or "under construction," date of site plan and/or subdivision approval:				4/21/20	13 1/21/201	6							8/26/20	20 8/26/20	20 5/2/201	8 11/21/2021
· · · · · · · · · · · · · · · · · · ·																
If "under construction," expected date of completion:				9/1/202	22											
· · ·				5/1/20												
Date of issuance of C.O.: If "built," date controls began:	10/18/19	996 11/8/199	6/27/2	108		3/4/202	2 7/19/202	21		11/8/2						11/21/2021
Length of Affordability Controls (years):		30 2			30 3	0 30	0 3	30 30	0	30		30	30	30	30 30	0 30
Administrative Agent or other entity responsible for						Habitat for Humanity, 20	Habitat for Humanity, 20	Habitat for Humanity, 20	Habitat for Humanity 20							
affirmative marketing:		Habitat for Humanity, 20 Court			Triad Associates, 1301 W. Forest					is Triad Associates, 1301 W. Fores	st					
	ResCare of NJ, 900 Commerce	House South Dennis Road, Cape			Grove Road, Vineland, NJ 08360;		Road, Cape May Court		Road, Cape May Court		0;					
	Parkway, Suite A, Mount Laurel NJ 08054 856-608-8761	May Court House, NJ 08210; 609- 465-1626	NJHMFA, 637 Clinton, Trenton; 609-278-7400		856-690-9590; bmingey@triadincorporated.com	House, NJ 08210; 609-465- 1626	House, NJ 08210; 609-465- 1626	 House, NJ 08210; 609-465- 1626 	House, NJ 08210; 609-46 1626	bmingey@triadincorporated.co	om					
Contribution (for payments in lieu)		-		-	5/1/201	8					-		-			-
Total Affordable Housing Units Proposed Total Affordable Housing Units Completed to Date		3	1	1 1	26 2	9	1	1	1	1	1	0	0	79 2 0	0	1 2
Type of Affordable Units:																
Family		0	1	1	26 2	0	1	1	1	1	5	20	24			1 2
Family Family For-Sale Family Rental			1	1	26 2	0	1	1 :	1	1	5	20	24			1 2
Senior Senior For-Sale		0												79		
Senior Rental		0											-	79		
Supportive/Special needs Supportive For-Sale		3														
Supportive Rental		3														
Bedroom/Income Splits:																
1 BR/or Efficiency Affordable Units Very Low-Income:		0	0	0	5	0 0	0	0 (0	0	0	0	0	0	1
Low-Income:					0										1	1
Moderate-Income:					2											
2 BR Affordable Units Very Low-Income:		U	U	1	16 1	4	1	0 (,	U	U	U	0	U	0	1 1
Low-Income:				1	7	4	<u> </u>									1
Moderate-Income:		0	1	0	8	-	1	1		0	1	0	0	0	0	1
3+ BR Affordable Units Very Low-Income:		U	1	U	0	J (1 (,	U	1	0	0	0	0	0
Low-Income:					3	-		1								
Moderate-Income: Supportive/Special Needs Units:		3	0	0	3	5	n	0		0	1	0	0	0	0	-
Very Low-Income:		3								0						0
Low-Income:																
Moderate-Income:							1					-			-	L
OVERALL PRIOR AND THIRD ROUND SUMMARY						1										
	NUMBER	PERCENT				-										
Total Units Very-Low Income Units		22 - 8 369	%			-										
Low-Income		18 829	%													
Moderate-Income		21 959 104 4739				_										
Family Senior		104 4739 79 3599														
Supportive/Special Needs		3 149	%													
For Sale Rental		54 2459 132 6009				-										
	1	132 6009				+										
Comments:]										
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4. VERY LOW INCOME REPORTING

Very Low Income Units	approved	and constructe	d since July 17, 2	008
Development/Compliance Mechanism	Total Affordable Units	VLI units constructed as of date of report	VLI units not constructed as of date of this report but still planned	Type of Very Low Income Unit (Family, Senior, Special Needs)
8 Foxborough Road	3	0	3	Special Needs
21 Ocean Ave	1	0	1	Family
Holly Berry	1	0	0	Family
Heritage Acres Mobile Home Park	27	0	4	Family
Osprey Cove/2058 South Shore Road	20	0	0	Family
Habitat for Humanity	4	0	3	Family
Market to Affordable	5	0	0	Family
Hidden Pond	20	0	3	Senior
Heritage Links	24	0	4	Senior
Stagecoach Road Senior Housing	79	0	11	Senior
Marmora Town Center	295	0	39	Family
Total	479	0	68	

This tab provides reporting required on very low income units, i.e. units affordable to and reserved for households at or below 30% of regional median income. See N.J.S.A. 52:27D-329.1.