



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:

TRIAD
ASSOCIATES
CELEBRATING 40 YEARS

1. GENERAL INFORMATION AND TRUST FUND 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 Packowski, 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	\$78,552.96
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	\$40,654.94	\$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 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	\$16,700.00	
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

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	Completed /Credit worthy	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	N	0		1/1	Plumbing/Wells Roof Weatherization (Insulation, Siding, Windows/Door)		
12 E. Mapleshade Lane	B: 674-; L: 5-; Q: ; Unit:	05/13/13	\$0.00	\$19,950.00	\$0.00	01/06/14	N	0		1/1	Roof Weatherization (Insulation, Siding, Windows/Door)		
1340 Stagecoach Rd	B: 549-; L: 50-; Q: ; Unit:	10/26/12	\$0.00	\$20,000.00	\$0.00	02/13/13	N	0		1/1	Heating Weatherization (Insulation, Siding, Windows/Door)		
1460 Stagecoach Rd	B: 551-; L: 24-; Q: ; Unit:	12/27/14	\$0.00	\$19,515.00	\$0.00	04/15/15	N	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	N	0		1/1	Plumbing/Wells Roof Weatherization (Insulation, Siding, Windows/Door)		
1621 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 Weatherization (Insulation,		

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1632 US Rt-9	B: 565-03; L: 76- ; Q: ; Unit:	05/13/13	\$0.00	\$18,535.00	\$0.00	01/06/14	N	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	N	0		1/1	Plumbing/Wells Roof		
21 Oak St	B: 643-; L: 16-; Q: ; Unit:	12/12/12	\$0.00	\$19,075.00	\$0.00	01/06/14	N	0		1/1	Heating Roof Weatherization (Insulation, Siding, Windows/Door)		
24 S. Frances Dr	B: 471-; L: 8-; Q: ; Unit:	08/16/12	\$0.00	\$20,000.00	\$0.00	02/13/13	N	0		1/1	Electrical Plumbing/Wells Roof Weatherization (Insulation, Siding, Windows/Door)		
320 Mill Rd	B: 31-; L: 72-; Q: ; Unit:	02/13/13	\$0.00	\$19,885.00	\$0.00	01/06/14	N	0		1/1	Plumbing/Wells Weatherization (Insulation, Siding, Windows/Door)		
4 Delores Ave	B: 596-; L: 11-; Q: ; Unit:	03/14/14	\$0.00	\$20,000.00	\$0.00	04/15/15	N	0		1/1	Roof Weatherization (Insulation, Siding,		

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45 Hope Corson Rd	B: 565-05; L: 6-; Q: ; Unit:	03/01/13	\$0.00	\$19,369.00	\$0.00	01/06/14	N	0		1/1	Electrical Heating Roof Weatherization (Insulation, Siding, Windows/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	N	0		1/1	Electrical Roof Weatherization (Insulation, Siding, Windows/Door)		
Total Units			Total Hard Costs	Total Development Fees Expended	Total Funds Recaptured					Total Completed/ Credit Worthy			
14			\$0.00	\$276,015.00	\$0.00					14 / 14			

[illegible]

4. VERY LOW INCOME REPORTING

Very Low Income Units approved and constructed since July 17, 2008				
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.