



UPPER TOWNSHIP Affordable Housing Annual Report

Submitted to:

Fair Share Housing Center

November, 2020

PREPARED BY:

TRIAD
ASSOCIATES
CELEBRATING 40 YEARS

1. GENERAL INFORMATION AND TRUST FUND MONITORING

MUNICIPALITY NAME:	Upper Township
COUNTY:	
Date through which funds reported:	30-Jun-20
Name of person filling out form and affiliation/role:	Kathy Packcowski, Senior Associate, Traid Associated
Date of filling out form:	8/31/2020
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

(Note: Date in Approved Spending Plan = date through which revenues/expenditures are shown in the approved spending plan; if no approved spending plan, show revenues/expenditures through June 30, 2015 in Column B and beginning July 1, 2015 in Column C.)

TRUST FUND INFORMATION

	Inception - December 31, 2019	January 1, 2020 to Present	Total
REVENUE SUMMARY			
Barrier Free Escrow	\$ -		\$0
Development Fees	\$ 1,362,460	\$ 87,828	\$1,450,288
Interest Earned	\$ 31,807	\$ 10,288	\$42,095
Other Income	\$ 19,949	\$ -	\$19,949
Payments-in-Lieu of Construction	\$ 149,362		\$149,362
TOTAL	\$ 1,563,578	\$ 98,116	\$1,661,694

EXPENDITURE SUMMARY			
Administration**	\$ 55,890	\$ 1,500	\$57,390
Affordability Assistance***	\$ -	\$ -	\$0
Very Low-Income Affordability Assistance	\$ -	\$ -	\$0
Barrier Free Conversions	\$ -	\$ -	\$0
Housing Activity	\$ -	\$ -	\$0
TOTAL	\$ 55,890	\$ 1,500	\$57,390

ADMINISTRATION: January 1, 2020 to Present		
Name	List types of administrative expenses	Amount
Triad	Update Affodability Assistance Manual	\$1,500.00
TOTAL		\$1,500

AFFORDABILITY ASSISTANCE: January 1, 2020 to Present		
Name	List affordability assistance projects and programs	Amount
NONE		
TOTAL		\$0

HOUSING ACTIVITY: January 1, 2020 to Present		
Type of Housing Activity	Specific Site or Program	Amount
NONE		
TOTAL		\$0

Comments:

*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			

3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	8 Foxborough Road	201 Ocean Ave	Holly Berry	Heritage Acres Mobile Home Park	Osprey Cove/2058 South Shore Road	Habitat for Humanity	Market to Affordable	Hidden Pond	Heritage Links	Stagecoach Road Senior Housing	Marmora Town Center
Project developer:	ResCare of NJ	Habitat for Humanity	Holly Berry, LLC	Park, LLC	2058 South Shore Road LLC	Habitat for Humanity					
Compliance Mechanism:	Support and Special Needs	100% Affordable	100% Affordable	Inclusionary Zoning	Inclusionary Zoning	100% Affordable	100% Affordable	Inclusionary	Inclusionary	100% Affordable	Inclusionary
Compliance Mechanism #2 (if project has multiple):											
Round:	Prior Round	Prior Round	Prior Round	Prior Round	Prior Round	Prior Round	Prior Round	Third Round	Third Round	Third Round	Third Round
Block (if multiple separate by commas):	564	628	453	639	567	527; 527; 590; 585		559	567	549	
Lot (if multiple separate by commas):	19	13-28	182.03	15.01, 15.02	28	12-21, 22-31; 2; 1-8		36.01, 37, 39	50.01	87,102, 103	
Address:	9 Foxborough Road, Ocean View, NJ 08230	21 Ocean Ave, Marmora, NJ	94 Route 50, Unit #4, Seaville, NJ 08230	Tuckahoe Road	Route 9 and Route 50; Nine (9) units along Harriet Lane (2, 4, 6, 8, 10, 12, 14, 16 & 18 Harriet Lane); One unit located at 1729 South Shore Road	Two lots transferred to Habitat in December 9, 2018 (Ord. 05-2018) and restrictive deeds have been filed - 41 Redwood Ave, Marmora, NJ (currently under construction and due to be completed by 12/31/20) and 43 Redwood Avenue (construction not started, but due to be complete 8/31/21). Two lots authorized to be transferred to Habitat on December 9, 2019 (Ord. 19-2019) - These are awaiting title work.		3017 and 3023 Rt. 9 South	1357 Route 9 South, Palermo		
Construction required to begin by (for mechanisms other than inclusionary development):											
Status:	Complete	Complete	Complete	Approved and Under Construction	Approved and Under Construction	Approved and Under Construction	In Process	Approved not built	Approved not built	Approved not built	Approved not built
If project has site plan /or subdivision approval, date building permits received (DD/MM/YYYY):											
If "approved not built" or "under construction," date of site plan and/or subdivision approval:				4/21/2013	1/21/2016					8/26/2020	8/26/2020
If "under construction," expected date of completion:				6/1/2022		12/31/2020					
Date of issuance of C.O.:											
If "built," date controls began:	10/18/1996	11/8/1999	6/27/2008								
Length of Affordability Controls (years):	30	20	30	30	30	20	30	30	30	30	30
Administrative Agent or other entity responsible for affirmative marketing:	ResCare of NJ, 900 Commerce Parkway, Suite A, Mount Laurel NJ 08054 856-608-8761	Habitat for Humanity, 20 Court House South Dennis Road, Cape May Court House, NJ 08210; 609-465-1626	Housing Affordability Services, NIHMFA, 637 Clinton, Trenton; 609-278-7400	Triad Associates, 1301 W. Forest Grove Road, Vineland, NJ 08360; 856-690-9590; bmingey@triadincorporated.com	Triad Associates, 1301 W. Forest Grove Road, Vineland, NJ 08360; 856-690-9590; bmingey@triadincorporated.com	Habitat for Humanity, 20 Court House South Dennis Road, Cape May Court House, NJ 08210; 609-465-1626	Forest Grove Road, Vineland, NJ 08360; 856-690-9590; bmingey@triadincorporated.com				
Contribution (for payments in lieu)					5/1/2018						
Total Affordable Housing Units Proposed	3	1	1	27	20	4	5	20	24	79	295
Total Affordable Housing Units Completed to Date	3	1	1	0	9	0	1	0	0	0	0
Type of Affordable Units:											
Family	0										
Family For-Sale		1				4	5	20	24		
Family Rental			1	27	20						
Senior	0										
Senior For-Sale	0										
Senior Rental	0									79	
Supportive/Special needs	3										
Supportive For-Sale	0										
Supportive Rental	3										

Bedroom/Income Splits:

1 BR/or Efficiency Affordable Units	0	0	0	0	0	0	0	0	0	0	0
Very Low-Income:											
Low-Income:											
Moderate-Income:											
2 BR Affordable Units	0	0	1	19	4	1	0	0	0	0	0
Very Low-Income:				4		1					
Low-Income:			1	8	4						
Moderate-Income:				7							
3+ BR Affordable Units	0	1	0	8	5	3	1	0	0	0	0
Very Low-Income:		1				3					
Low-Income:				5							
Moderate-Income:				3	5		1				
Supportive/Special Needs Units:	3	0	0	0	0	0	0	0	0	0	0
Very Low-Income:	3										
Low-Income:											
Moderate-Income:											

OVERALL PRIOR AND THIRD ROUND SUMMARY		
	NUMBER	PERCENT
Total Units	15	-
Very-Low Income Units	12	80%
Low-Income	18	120%
Moderate-Income	16	107%
Family	0	0%
Senior	0	0%
Supportive/Special Needs	3	20%
For Sale	54	360%
Rental	130	867%

Comments:

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	3	0	Special Needs
21 Ocean Ave	1	0	0	Family
Holly Berry	1	0	0	Family
Heritage Acres Mobile Home Park	26	0	0	Family
Osprey Cove/2058 South Shore Road	20	0	0	Family
Habitat for Humanity	4	0	0	Family
Market to Affordable	5	0	0	Family
Hidden Pond	20	0	0	Senior
Heritage Links	24	0	0	Senior
Stagecoach Road Senior Housing	79	0	0	Senior
Marmora Town Center	295	0	0	Family
Total	478	3	0	

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.

Compliance Mechanism(s)

100% Affordable
Accessory apartment program
Assisted living residence
Extension of expiring controls
Inclusionary zoning
Market-to-Affordable
RCA (approved pre-2008)
Redevelopment
Support and special needs
Other

Status

No approvals
Approved not built
Under construction
Built

Rounds

Prior Round
Third Round
Prior and Third Round