

1. GENERAL INFORMATION AND TRUST FUND MONITORING

Spending Plan is currently being prepared as outlined in Settlement Agreement approved on June 24, 2020. Information on this sheet is subject to change.

MUNICIPALITY NAME:	Roxbury Township	
COUNTY:	Morris County	
Date through which funds reported:		5/31/2020
Name of person filling out form and affiliation/role:	Lisa Spring/Trust Fund Report Preparer II	
Date of filling out form:		6/26/2020
Email:	springl@roxburynj.us	
Municipal Housing Liaison for municipality:	Russell Stern	
Email:	sternr@roxburynj.us	
Income Limits Year Being Used by Municipality*:		

(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 - Date in Approved Spending Plan or June 30, 2015	Date in Approved Spending Plan or July 1, 2015 to Present	Total
REVENUE SUMMARY			
Barrier Free Escrow			\$0
Development Fees	\$ 1,703,894	\$ 281,771	\$1,985,665
Interest Earned	\$ 880,594	\$ 62,149	\$942,743
Other Income			\$0
Payments-in-Lieu of Construction	\$ 1,630,945		\$1,630,945
TOTAL	\$ 4,215,433	\$ 343,919	\$4,559,353

EXPENDITURE SUMMARY			
Administration**	\$ 692,011	\$ 1,592,553	\$2,284,564
Affordability Assistance***			\$0
Very Low-Income Affordability Assistance	\$ 300		\$300
Barrier Free Conversions			\$0
Housing Activity	\$ 3,662,706		\$3,662,706
TOTAL	\$ 4,355,017	\$ 1,592,553	\$5,947,570

ADMINISTRATION: Date in Approved Spending Plan to Present		
Name	List types of administrative expenses	Amount
Murphy, McKeon	Legal Fees	\$183,341.00
Banisch/Stern/Ferreiro/Kellar&Kirk/Envocare/Brinkerhof	Consulting Fees	\$1,294,045.00
Legal Closing DPW/permits/labs/daily record etc	Other Administrative Costs	\$807,178.00
TOTAL		\$2,284,564

AFFORDABILITY ASSISTANCE: Date in Approved Spending Plan to Present		
Name	List affordability assistance projects and programs	Amount
Homeownership Assistance-None		\$300.00
TOTAL		\$300

HOUSING ACTIVITY: Date in Approved Spending Plan to Present		
Type of Housing Activity	Specific Site or Program	Amount
Market to Affordable		\$ 153,000
New Construction	River Park Vil/133 Landing Rd/11 Salmon Rd	\$ 724,000
Rehabilitation		\$ 20,000
Supp/Spec Needs Hsg	Comm Hope/Dellamo/DPW/Edith Rd/Kingtown/Port Morris	\$ 2,765,706
	Fire House/Willow Walk Renaissance	
TOTAL		\$3,662,706

Comments: additional amounts of \$10,994.27 & \$49,393.13 in revenues and \$359,891.76, \$1,413,160.43, \$24,612., \$957,077. and \$791,363. in expenses are all added amts to the revenue/expense side for the Housing Es

*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

Settlement Agreement approved 6/24/2020. HE&FSP to be prepared prior to compliance 1/7/2021

Total Third Round rehabilitation obligation	26
Rehabilitation program administrator(s) with email, phone number, and address: (if multiple rehab programs list administrator for each)	Morris County Community Development Program
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):	N/A

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

2		3					4	5	7	8	9	10	11	12	13						
Street Address	Case Number (if applicable)	Rehab program used (e.g. county program, municipal rental rehab)	Block	Lot	Unit Number	Owner	Renter	Very Low	Low	Moderate	Final Inspection Date (mm/dd/yy)	Funds expended on 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)		

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.

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

Program Administrator

Date

Code Official

Date

3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	52 Main Street	Willow Walk/Lakeside Village	River Park Village	Dellamo	Renaissance	54 Main Street	216 Drake Lane	152 Mountain Ave	Write Down/Buy Down	Muscarelle/Woodmont	Willow Walk	Group Homes**	133 Landing
Project developer:	Farley					Rand Homes (Andrus Aasmaa)				(Woodmont Parc)			Homeless Solutions
Compliance Mechanism:	Inclusionary (mixed used)	100% Affordable	100% Affordable	Inclusionary	Inclusionary	Inclusionary (mixed use)	Group Home	Group Home	Write Down/Buy Down	Inclusionary	Family Rental	Group Home	100% Affordable
Compliance Mechanism #2 (if project has multiple):	Other - "D" Variance/Site Plan					Other - "D" Variance/Site Plan							
Round:	2nd round	2nd Round (63 units) / 3rd Round (42 units)	2nd Round (53 units) / 3rd Round (69 units)	2nd Round	2nd Round	2nd round	2nd round	3rd round	2nd Round	3rd Round	3rd Round	3rd Round	3rd Round
Block; Lot	3701; 12	6201; 4,	10701; 1	6101; 4.01	6201; 5.1	3701; 11	6501;2	8201; 11	Multiple	9401; 13.01	6201; 3.0002		10101;28
Address:	52 Main Street	2-6 Willow Walk	Burton Way and Trudy Drive	19 Mary Louse Drive	1 Brook Drive	54 Main Street	216 Drake Lane	152 Mountain Ave	1 Lakeside Drive, 505 Center Road; 518 Ryerson Road; 53 Canal Street; 569 Rogers	1550-1800 Route 46, Ledgewood, NJ o7852	Willow Walk	Multiple	133 Landing Road, Landing, NJ
Construction required to begin by (for mechanisms other than inclusionary development):													
Status:	Constructed	Constructed	Constructed	Constructed	Constructed	Constructed	Constructed	Constructed	Constructed	Under Countruction	Constructed	Constructed	Constructed
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:													
If "under construction," expected date of completion:										2020			
Date of issuance of C.O.:	2007	1996	October 1996 to April 1997		2017	2017	1989			2001-2002	2019-2020	1996	2009
If "built," date controls began:	2007	1996	1997		2017	2017	1989				2020	1996	2009
Length of Affordability Controls (years):	30	30	30		30	30	30				30	30	30
Administrative Agent or other entity responsible for affirmative marketing:	52 Main Street Associates, LLC	Renaissance Village Associates LLC, 1 woodbridge Center Drive, Suite 820, Woodbridge, NJ 07094	Ingerman Group	Renaissance Village Associates LLC, 1 woodbridge Center Drive, Suite 820, Woodbridge, NJ 07094	Renaissance Village Associates LLC, 1 woodbridge Center Drive, Suite 820, Woodbridge, NJ 07095	Rand Homes (Andrus Aasmaa)				Housing Partnership of Morris County	CGP&H - Community Grants, Planning and Housing	Howard Rappaport	Homeless Solutions
Contribution (for payments in lieu)													
Total Affordable Housing Units Proposed	2	105	122		35	35	2	2	5	6	46	1	47
Total Affordable Housing Units Completed to Date	2	105	122		35	35	2	2	5	6	46	1	47
Type of Affordable Units:													
Family	2	0	122		35	35	2			6	46	1	47
Family For-Sale	0						0			6			
Family Rental	2		122		35	35	2				46	1	47
Senior	0	105					0						
Senior For-Sale	0						0						
Senior Rental	0	105					0						
Supportive/Special needs	0	0					0	2	5				47
Supportive For-Sale	0						0						
Supportive Rental	0						0	2	5				47

Bedroom/Income Splits:													
1 BR/or Efficiency Affordable Units	0	0	0	6	6	0	0	0	0	0	9	0	0
Very Low-Income:							0	0			2		0
Low-Income:				3	3						3		
Moderate-Income:				3	3						4		
2 BR Affordable Units	0	0	0	18	18	0	0	0	0	0	27	0	4
Very Low-Income:											3		
Low-Income:				9	9						11		
Moderate-Income:				9	9						13		
3+ BR Affordable Units	0	0	0	11	11	0	0	0	0	0	10	0	0
Very Low-Income:											1		
Low-Income:				6	6						4		
Moderate-Income:				5	5						5		
Supportive/Special Needs Units:	0	0	0	0	0	0	2	5	0	0	0	0	47
Very Low-Income:							2	5					47
Low-Income:													
Moderate-Income:													

OVERALL PRIOR AND THIRD ROUND SUMMARY		
	NUMBER	PERCENT
Total Units Constructed	422	
Very-Low Income Units	68	16%
Low-Income	54	13%
Moderate-Income	56	13%
Family	632	150%
Senior	134	32%
Supportive/Special Needs	62	15%
For Sale	65	15%
Rental	763	181%

Comments:

3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	11 Salmon Road	Roxbury DPW	Edith Road	Port Morris Firehouse	Merry Heart	75 Main Street	Seneca Heights	West Dewey/McArdle	Porfido	Hercules	Blue Vista	Southwinds	Woodmont	Cabel
Project developer:	Habitat for Humanity	Habitat for Humanity		Habitat for Humanity	Merry Heart	Equinet Properties	Senecal Heights, LLC	Habitat for Humanity						
Compliance Mechanism:	Family For Sale	Famiy for Sale	Family for Sale	Family for Sale	Assisted Living	For-sale	Family Rental	Family for Sale (Habitat for Humanity)	Assited Living	inclusionary	inclusionary	Inclusionary	Inclusionary	Redevelopment
Compliance Mechanism #2 (if project has multiple):							"D" variance and site plan							
Round:	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round	3rd round	3rf Round	3rd Round	3rd Round	3rd Round
Block; Lot	11312; 23	5203; 57	11802; 1	10502; 5	5201; 9, 12 & 13	3801; 78	4902; 25	7101; 25.01, 25.02, 25.03, and 25.04	3602; 1 and 9	4002; 5	9202; Lot 1, 2, 10	9402; 7	9603; 3 and 4	2601; 2
Address:	11 Salmon Road	119 and 121 Main Street, Succasunna	532 Masel Drive	580 Main Street, Landing, NJ		75 Main Street, Succasunna	40 South Hillside Avenue, Succasunna, NJ 07876	West Dewey Avenue			Mountain Road	U.S. Highway Route 46	U.S. Highway Route 46	U.S. Highway Route 46
Construction required to begin by (for mechanisms other than inclusionary development):														
Status:	Constructed	Under Construction	Contracted with H4H 2013	Under Construction	Constructed	Approved not built	Constructed	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)
If project has site plan /or subdivision approval, date building permits received (DD/MM/YYYY):							Project approved 2014 Resolution							
If "approved not built" or "under construction," date of site plan and/or subdivision approval:						2019								
If "under construction," expected date of completion:		2020		2021										
Date of issuance of C.O.:	2008													
If "built," date controls began:	2008													
Length of Affordability Controls (years):	30	30	30	30	30	30	30	30	30					
Administrative Agent or other entity responsible for affirmative marketing:		Habitat for Humanity	Habitat for Humanity	Habitat for Humanity	Merry Heart			Habitat for Humanity						
Contribution (for payments in lieu)														
Total Affordable Housing Units Proposed	1	12	2	4	8	2	1	8	18	22	92	30	14	25
Total Affordable Housing Units Completed to Date	1	0	0		8		1	0	0					
Type of Affordable Units:														
Family	1	12	2	4	2	1	8	22	92	30	14	25		
Family For-Sale	1	12	2	4	2	1	8	22	92	30	14	25		
Family Rental														
Senior					8				18					
Senior For-Sale					8				18					
Senior Rental														
Supportive/Special needs														
Supportive For-Sale														
Supportive Rental														

Bedroom/Income Splits:														
1 BR/or Efficiency Affordable Units	0	0	0	0	8	0	0	0	0	0	0	0	0	0
Very Low-Income:					8									
Low-Income:														
Moderate-Income:														
2 BR Affordable Units	0	0	0	2	0	2	0	0	0	0	0	0	0	0
Very Low-Income:														
Low-Income:														
Moderate-Income:														
3+ BR Affordable Units	0	0	0	2	0	0	0	0	0	0	0	0	0	0
Very Low-Income:														
Low-Income:														
Moderate-Income:														
Supportive/Special Needs Units:	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Very Low-Income:														
Low-Income:														
Moderate-Income:														

OVERALL PRIOR AND THIRD ROUND SUMMARY
Total Units Constructed
Very-Low Income Units
Low-Income
Moderate-Income
Family
Senior
Supportive/Special Needs
For Sale
Rental

Comments:

3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	Policastro	Kingtown	Salmon Stump	Group homes	Merry Heart Phase II	B-1/B-1A Existing Zoning
Project developer:					Merry Heart	
Compliance Mechanism:	Inclusionary	Inclusionary	Inclusionary	Group Home	Assisted Living	Inclusionary
Compliance Mechanism #2 (if project has multiple):						
Round:	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round	3rd Round
Block; Lot	6802; 9	9302; 4	8901; 2.02	multi	5103; 1.02	
Address:	Berkshire Valley Road	U.S. Highway Route 46	U.S. Highway Route 46		Commerce Boulevard	
Construction required to begin by (for mechanisms other than inclusionary development):						
Status: if project has site plan /or subdivision approval, date building permits received (DD/MM/YYYY):	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	No approvals (part of ongoing settlement agreement)	Application for development	Exisitng zoning
If "approved not built" or "under construction," date of site plan and/or subdivision approval:						
If "under construction," expected date of completion:						
Date of issuance of C.O.:						
If "built," date controls began:						
Length of Affordability Controls (years):					30	
Administrative Agent or other entity responsible for affirmative marketing:						
Contribution (for payments in lieu)						
Total Affordable Housing Units Proposed	47	33	82	8	3	4
Total Affordable Housing Units Completed to Date						
Type of Affordable Units:						
Family	47	33	82			4
Family For-Sale						
Family Rental	47	33	82			4
Senior						3
Senior For-Sale						
Senior Rental						3
Supportive/Special needs					8	
Supportive For-Sale						
Supportive Rental					8	

Bedroom/Income Splits:						
1 BR/or Efficiency Affordable Units	0	0	0	0	0	0
Very Low-Income:						
Low-Income:						
Moderate-Income:						
2 BR Affordable Units	0	0	0	0	0	0
Very Low-Income:						
Low-Income:						
Moderate-Income:						
3+ BR Affordable Units	0	0	0	0	0	0
Very Low-Income:						
Low-Income:						
Moderate-Income:						
Supportive/Special Needs Units:	0	0	0	0	0	0
Very Low-Income:						
Low-Income:						
Moderate-Income:						

OVERALL PRIOR AND THIRD ROUND SUMMARY
Total Units Constructed
Very-Low Income Units
Low-Income
Moderate-Income
Family
Senior
Supportive/Special Needs
For Sale
Rental

Comments:

4. VERY LOW INCOME REPORTING

Settlement Agreement approved 6/24/2020. No units in the Township have been approved after 2008.

VLI units constructed prior to 2008 not reflected and will be discussed in HE&FSP

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)
Group Homes	8		8	Group Homes
Porfido	18		18	Senior/Assisted Living
Herculese #1	11		3	Family
Blue Vista	92		12	Family
Southwinds	30		4	Family
Cabel	25		3	Family
Woodmont	14		2	Family
Policastro	47		6	Family
Kingtown	33		4	Family
Salmon Stump	82		11	Family
Merry Heart	3		3	Assisted Living Beds
Total	363	0	74	

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.

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