

**2022 AFFORDABLE HOUSING
ANNUAL MONITORING REPORT
Burlington Township
Burlington County, New Jersey**

March 3, 2023



Burlington Township Municipal Center
851 Old York Road
Burlington Township, NJ 08016
Main Number: 609-386-4444

1. GENERAL INFORMATION AND TRUST FUND MONITORING

MUNICIPALITY NAME:	Burlington Township
COUNTY:	Burlington County
Date through which funds reported:	12/31/2022
Name of person filling out form and affiliation/role:	Dawn Bass, CFO
Date of filling out form:	
Email:	dbass@twp.burlington.nj.us
Municipal Housing Liaison for municipality:	Mary Field
Email:	mfield@twp.burlington.nj.us
Income Limits Year Being Used by Municipality*:	2022

TRUST FUND INFORMATION

	Inception - Current February 28, 2021	March 1, 2021 to December 31, 2021	January 1, 2022 to December 31, 2022		Total
REVENUE SUMMARY					
Barrier Free Escrow					\$0
Development Fees	\$10,808,478.67	\$856,929.88	\$4,208,250.18		\$15,873,658.73
Interest Earned	\$559,832.00	\$9,135.21	\$46,554.95		\$615,522.16
Other Income (Bienvue Sales/Burlington Manor Loan Payments)			\$78,542.11		\$78,542.11
Payments-in-Lieu of Construction					\$0.00
TOTAL	\$11,368,310.67	\$866,065.09	\$4,333,347.24	\$0.00	\$16,567,723.00

EXPENDITURE SUMMARY					
Administration	\$970,375.33	\$455,076.51	\$318,197.48		\$1,743,649.32
Affordability Assistance - Burlington Manor and Downpayment Assistance	\$270,000.00		\$250,000.00		\$520,000.00
Affordability Assistance through 12/31/21 for CIS		\$506,051.00			\$506,051.00
Affordability Assistance paid in 2022 for CIS			\$46,495.88		\$46,495.88
Housing Activity - Extension of Controls	\$2,967,615.00	\$40,000.00	\$30,000.00		\$3,037,615.00
TOTAL	\$4,207,990.33	\$1,001,127.51	\$644,693.36	\$0.00	\$5,853,811.20

ADMINISTRATION:				
Name	List types of administrative expenses			Amount
Legal - Serlin, Parker, Clarke, Mason, Surenian	\$672,089.87	\$253,017.52	\$195,205.08	\$1,120,312.47
Planning Consultants - Allamo	\$123,419.64	\$162,412.50	\$84,371.25	\$370,203.39
Administrative Agent Consultant - Triad Associates		\$29,531.25	\$28,390.00	\$57,921.25
Office Supplies	\$1,126.58			\$1,126.58
Other Admin through	\$1,918.50	\$213.50	\$1,596.21	\$3,728.21
Other Admin Costs - Legal & Title Work(Through 2/28/21	\$81,715.54	\$6,892.18	\$4,581.47	\$93,189.19
Personnel	\$90,105.20	\$3,009.56	\$4,053.47	\$97,168.23
				\$0.00
				\$0.00
TOTAL	\$970,375.33	\$455,076.51	\$318,197.48	\$1,743,649.32

AFFORDABILITY ASSISTANCE: Date in Approved Spending Plan to Present				
Name	List affordability assistance projects			Amount
Rental Assistance (through 05/22/2012)	270000			\$270,000.00
Affordability Assistance through 12/31/21 for CIS**		\$ 506,051		\$506,051.00
** \$506,051 for Very Low				
Affordability Assistance paid in 2022 for CIS			46,495.88	\$46,495.88
Affordability Assistance - Downpayment Assist.			50,000.00	\$50,000.00
Burlington Manor at Steeplechase			200,000.00	\$200,000.00
TOTAL	\$270,000.00	\$506,051.00	\$296,495.88	\$1,072,546.88

HOUSING ACTIVITY: Date in Approved Spending Plan to Present				
RCA	1,048,125.00			\$1,048,125.00
				\$ -
Purchase of Springside School 10/23/2012	235,120.00			\$235,120.00
				\$0.00
Extension of Controls	1,454,370.04	\$40,000.00	\$30,000.00	\$1,524,370.04
				\$0.00
Springside School Apartments 02/11/2014	200,000.00			\$200,000.00
1 Baird Lane 02/25/2014	30,000.00			\$30,000.00
1106 Kaye Payment to Salt and Light				\$0.00
				\$ -
				\$ -
TOTAL	2,967,615.04	\$40,000.00	\$30,000.00	\$3,037,615.04

Comments:

Bank Balance as of 2/28/21	Bank Balance as of 12/31/22
\$7,160,320.34	\$10,717,234.35
Bank Balance as of 12/31/21	
\$7,025,258.25	

2. REHABILITATION

Total Third Round rehabilitation obligation	31
Rehabilitation program administrator(s) with email, phone number, and address: (if multiple rehab programs list administrator for each)	County of Burlington Department of Human Services Human Services Facility 795 Woodlane Road Westampton, NJ 08060 609-265-5800 • Fax: 609-265-5382 HumanServices@co.burlington.nj.us
Period of time covered (Only completed rehabs)	2010 to Present

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)					
2207 Rancocas		County CDBG	119	6.02		X			X			\$16,440.00	N/A	Roof	Yes	4/17/2016	Deferred Payment	N						
31 Evergreen		County CDBG	104.18	15		X			X			\$19,275.00	N/A	Roof	Yes	5/16/2018	Deferred Payment	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:	Rehabilitation	Rehabilitation	Rehabilitation	Bridle Club	Bridle Club - Extension of Controls	Burlington Heights - "Courts at Woodshire"	Burlington Heights - "Courts at Woodshire" - Extension of controls
Project developer:	Burlington County Home Improvement Loan Program	Burlington Township Rehabilitation Program	Burlington Township Rental Rehabilitation Program	Calton Homes	Calton Homes	Ryan Homes	Ryan Homes
Compliance Mechanism:	Rehabilitation	Rehabilitation	Rehabilitation	Inclusionary	Inclusionary	Inclusionary	Inclusionary
Compliance Mechanism #2 (if project has multiple):							
Round:				Prior Round - 55	Third Round	Prior Round-10 Third Round 20	Third Round
Block					131	131	109
Lot				401-902	401-902		2
Address:				Lindsley Court	Lindsley Court	Knightwood Road and Guilford Place	Knightwood Road and Guilford Place
Construction required to begin by (for mechanisms other than inclusionary)							
Status:	Ongoing	Ongoing	Ongoing	Complete	Complete	Complete	Complete
If project has site plan /or subdivision approval, date building permits received							
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.:				(Final CIO - 11/28/1994)		12/31/2002	
If "built," date controls began:							
Length of Affordability Controls (years):	Until Change in Title	Until Change in Title	Until Change in Title	20	30	20	30
Administrative Agent or other entity responsible for affirmative marketing:	Burlington County Human Services Dept.Division of Community Development795 Woodlane RoadWestampton, NJ 08060609-265-5072 press 2https://www.co.burlington.nj.us/258/Block-Grant-Program	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	CGP&H 1249 S. River Rd., Suite 301 Cranbury, NJ 08512 609-664-2769	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com
Contribution (for payments in lieu)					0		
Total Affordable Housing Units Proposed				55	40	30	10
Total Affordable Housing Units Completed to Date	Obligation 31; 2 complete	No units completed in 2022	No units completed in 2022	55	40	30	10
Type of Affordable Units:	Rehabilitation	Rehabilitation	Rehabilitation				
Family				55	40	30	10
Family For-Sale				55	40	30	10
Family Rental				0	0	0	0
Senior				0	0	0	0
Senior For-Sale				0	0	0	0
Senior Rental				0	0	0	0
Supportive/Special needs				0	0	0	0
Supportive For-Sale				0	0	0	0
Supportive Rental				0	0	0	0

Bedroom/Income Splits:							
1 BR/ or Efficiency Affordable Units							
Very Low-Income:							0
Low-Income:							
Moderate-Income:							
2 BR Affordable Units							
Very Low-Income:				55		22	10
Low-Income:				31	20	17	8
Moderate-Income:				24	20	5	2
3+ BR Affordable Units							
Very Low-Income:						8	
Low-Income:						8	
Moderate-Income:						0	
Supportive/Special Needs Units:							
Very Low-Income:						0	0
Low-Income:							
Moderate-Income:							

OVERALL PRIOR AND THIRD ROUND		
	NUMBER	PERCENT
Total Units	587	
Very-Low Income Units	181	31%
Low-Income	307	52%
Moderate-Income	175	30%
Family	323	55%
Senior	169	29%
Supportive/Special Needs	111	19%
For Sale	347	59%
Rental	483	82%

Comments:

Shannon Estates	Shannon Estates - Extension of Controls	Steeplechase (Burlington Manor)	Steeplechase - Extension of Controls	Park South	Park South - Extension of Controls	BCCAP/MEND HUD 202 Funding	Springside School - LIHTC	Fountain Avenue
Moynihan Builders	Moynihan Builders	Calton Homes	Calton Homes	S N Golden Inc	S N Golden Inc	BCCAP/MEND -Section 202 Supportive Housing for the Elderly	MEND	
Inclusionary	Inclusionary	Inclusionary	Inclusionary	Inclusionary	Inclusionary	100% Affordable Senior	100% Affordable Rental 55+ and persons with special needs	Proposed (20% AH Set Aside) Family Rentals
Prior Round -17	Third Round	Prior Round -70	Third Round	Prior Round-24	Third Round	Prior Round - 45/Third Round -26	Prior Round - 14/Third Round -60	Third Round - 28
114	114	147-17	147-17	140	140	124	114	112
1206	1206			2-24	2-24	13	3	1,1.01,6
Kyle's Cove, Kenny's Cove and Meghan's Lane	Kyle's Cove, Kenny's Cove and Meghan's Lane	Manor Drive	Manor Drive	Faulkner Court	Faulkner Court	1714 Hancock Lane,	1508 Mt. Holly Rd,	Fountain Avenue
Complete	Complete	Complete	Complete	Complete	Complete	Complete	Complete	28 Affordable Family Rentals Proposed
Final CIO - 07/24/1991	Final CIO - 07/24/1991	5/27/1999	5/27/1999	5/1/1993	5/1/1993	8/1/1994	4/12/2012	
2/24/1990	2/24/1990			2/10/1998	2/10/1998	9/11/1997	10/30/2013	Restrictions Pending
20	30	20	30	20	30	40	30	
Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Burlington County Community Action 718 Route 130 South Burlington, NJ 08016 609 386-7054	MEND 99 East Second Street Moorestown, New Jersey 08057 info@mendinc.org https://mendinc.org/housing/application-process/	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com
17		70		24		71	74	28
17	17	70	59	24	22	71	74	0
17	17	70	60	12	10			Will be UHAC Compliant
17	17	70	60	12	10			28
				12	12	71	74	
				12	12	71	58	
							16	

0	0	0	0	0	0	71	52	5
						67		
						3	40	
						1	12	
17	17	60	50	21	16	0	6	17
		54	44	17	13		4	
17	17	6	6	4	3		2	
0	0	10	11	3	4	0	0	6
		6	6	1	2			
		4	5	2	2			
0	0	4	0	0	0	0	16	0
							16	

* 137 Extension of Controls completed as of 5/11/22
* 13 in progress as 150 were approved for Round 3

Salt and Light - Market to Affordable Program (Bienvenue)	Supportive & Special Needs Group Homes	TJC Site on Rancocas Road	Bromley Site	CIS/The Place at Burlington	Masonic Charitable Foundation (Beds) and Granville Assisted Living Residence	Salt and Light Company, Inc. 1106 Kaye Court	Habitat for Humanity 1409 Beverly Road	Habitat for Humanity 1 Baird Lane	
Salt and Light Company, Inc. 1841 Burlington-Mt. Holly Road, Westhampton NJ	Group Home Spreadsheet Attached			Community Investment Strategies(CIS)	Foundation - 33 Personal Home Card Beds Granville Assisted Living - 4 beds	Salt and Light Company, Inc. 1841 Burlington-Mt. Holly Road, Westhampton NJ	Habitat for Humanity	Habitat for Humanity	
Rent - NJ Shelter Support Grant	100% Affordable Supportive Housing/Alternative Living	Proposed (20% AH Set Aside) Family Rentals	Proposed (20% AH Set Aside) Family Rentals	100% Affordable LHTC	Age Restricted/Medicaid Waiver/Assisted Living	100% Affordable	100% Affordable Family For Sale	100% Affordable Family For Sale	
Third Round - 2	Prior Round - 42 Third Round - 24	Third Round - 28	Third Round - 100	55 units Prior Round; 29 units in the Third Round);	Third round- 37	Prior Round - 1	Third round -1	Third round -1	
102.15	See Group Home Spreadsheet	110	124	Block 105.01	113 and 119		100.03	148.02	
2.02	See Group Home Spreadsheet	1.01	10,12	6	1.01 and 7.03		2	1	
819 Henri Court 1013 Jardin Court	58 Credits in Total; 14 additional units are in Springside School. See Third Round Plan				Masonic - 902 Jacksonville Road Granville - 111 Sunset Road	1106 Kaye Court	1409 Beverly Road	1 Baird Lane	
Complete	Complete	28 Affordable Family Rentals Proposed	100 Affordable Family Rentals Proposed	84 Affordable Family Rentals - construction pending	Complete	Complete	Complete	Complete	
Restrictions Pending		Restrictions Pending	Restrictions Pending	Restrictions Pending	9/10/19 - Masonic	Restrictions Pending	6/28/2018	7/31/2012	
40						30	30	30	
Salt and Light Company, Inc. 1841 Burlington-Mt. Holly Road, Westhampton NJ	See Third Round Plan	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Community Investment Strategies(CIS) 1970 Brunswick Avenue Lawrenceville, NJ 08648 Phone: 609-298-2229 https://www.communityinvestmentsstrategies.com/	Masonic Charitable Foundation 902 Jacksonville Road, Burlington NJ 111 Sunset Road Burlington NJ	Salt and Light Company, Inc. 1841 Burlington-Mt. Holly Road, Westhampton NJ	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	Triad Associates 1301 W. Forest Grove Road Vineland NJ 856-690-9590 agalante@triadincorporated.com	
2	58	28	100	84	37	1	1	1	
	58				37	1	1	1	
		Will be UHAC Compliant	Will be UHAC Compliant						
4		28	100	84		1	1	1	
	58				37				
	58				37				
	0	5	20	3	0	1	0	0	0
				0					
				3		1			
2	0	17	60	43	0		0	1	0
				2				1	
2				17					
				24					
	0	6	20	28	0	0	1		0
				1					
				12			1		
				15					
	58	0	0	10	37	0			0
	58			10	37				

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)
Springside School 100% Affordable	74	16		Special Needs
Assisted Living	37	37		Assisted Living
Group Homes	30	30		Group Homes
CIS/ Cramp	84	0	13	Tax Credit
1106 Kaye	1	0		Salt & Light Family Rental
1 Baird	1	0		Habitat For Sale
1409 Beverly	1	0		Habitat For Sale
1013 Jardin/819 Henri	2	0		Salt & Light Family Rental
Fountain Avenue family rentals	28	0	4	Inclusionary Family Rental
TJC/Rancocas Road family rentals	28	0	4	Inclusionary Family Rental
Bromley Tract family rentals	100	0	13	Inclusionary Family Rental
Total	386	83	34	