

## 1. GENERAL INFORMATION AND TRUST FUND MONITORING

MUNICIPALITY NAME:	City of Summit
COUNTY:	Union
Date through which funds reported:	12/31/2022
Name of person filling out form and affiliation/role:	Marc Leckington, Administrative Agent
Date of filling out form:	12/31/2022
Email:	<a href="mailto:marc@leckingtonadvisors.com">marc@leckingtonadvisors.com</a>
Municipal Housing Liaison for municipality:	Matthew DiLauri, QPA
Email:	<a href="mailto:MDiLauri@cityofsummit.org">MDiLauri@cityofsummit.org</a>
Income Limits Year Being Used by Municipality*:	2022

(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	\$	1,497,557		\$1,497,557
Interest Earned	\$	92,330.70		\$92,331
Other Income	\$	-		\$0
Payments-in-Lieu of Construction	\$	162,849		\$162,849
<b>TOTAL</b>	<b>\$</b>	<b>1,752,737</b>	<b>\$</b>	<b>\$1,752,737</b>

EXPENDITURE SUMMARY				
Administration**	\$	638,417		\$638,417
Affordability Assistance***	\$	191,672		\$191,672
Very Low-Income Affordability Assistance	\$	-		\$0
Barrier Free Conversions	\$	-		\$0
Housing Activity	\$	2,116,000		\$2,116,000
<b>TOTAL</b>	<b>\$</b>	<b>2,946,089</b>	<b>\$</b>	<b>\$2,946,089</b>

### ADMINISTRATION: Date in Approved Spending Plan to Present

Name	List types of administrative expenses	Amount
Clarke Caton Hintz	Affordable Housing Planner	\$ 32,864.54
Surenian, Edwards, Buzak & Nolan	Affordable Housing Attorney	\$ 114,455.85
CGP&H	Administrative Agent	\$ 39.00
Worrell Newspaper	Advertising	\$ 252.19
NJ Advance Media	Advertising	\$ 1,395.84
Burgis	Affordable Housing Planner	\$ 6,140.00
Cleary, Giacobbe	AH Attorney - Habitat Project	\$ 16,000.00
Stonefield Engineering	Engineering	\$ 5,275.00
Davison, Eastman, Munoz, Paone	Legal Services	\$ 3,559.00
Colliers Engineering	Engineering	\$ 1,400.00
Leckington Advisors, LLC	Administrative Agent	\$ 23,757.50
Matthew DiLauri, MHL	MHL Stipend, 2020 - 12/31/22	\$ 12,000.00
2016 and 2017 Administration Expenses Total	Various, Compliance	\$ 429,225.00
<b>TOTAL</b>		<b>\$646,364</b>

<b>AFFORDABILITY ASSISTANCE: Date in Approved Spending Plan to Present</b>			
Name	List affordability assistance projects and programs	Amount	
31 Russell Place	Affordability Assistance	\$	191,672.00
<b>TOTAL</b>			<b>\$191,672</b>

<b>HOUSING ACTIVITY: Date in Approved Spending Plan to Present</b>			
Type of Housing Activity	Specific Site or Program	Amount	
Construction Subsidy	Habitat of Humanity (146 Morris Avenue)	\$	1,416,000
Rehabilitation	2 Weaver Street	\$	300,000
Rehabilitation	50 Glenwood Place	\$	400,000
<b>TOTAL</b>			<b>\$2,116,000</b>

**Comments:**

\*View 2020 income limits: [https://ahpnj.org/member\\_docs/Income\\_Limits\\_2020.pdf](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_2019_FINAL.pdf)

[https://ahpnj.org/member\\_docs/Income\\_Limits\\_2018.pdf](https://ahpnj.org/member_docs/Income_Limits_2018.pdf)

[https://ahpnj.org/member\\_docs/Income\\_Limits\\_2017.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

<b>Total Third Round rehabilitation obligation</b>	<b>131</b>
<b>Rehabilitation program administrator(s) with email, phone number, and address</b> (if multiple rehab programs list administrator for each)	Development Directions, LLC, 123 N Union Avenue, 3rd floor Suite 306, Cranford, NJ 07016; christina@developmentdirectionsllc.com, 732-507-2004
<b>Period of time covered</b> (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):	<b>2015-Present</b>

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

### 3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	43 Glendale Avenue	39 Morris Avenue	50 Parmley Place	13 North Street	120 Morris Avenue	31 Russell Place
Project developer:	Our House Inc	Morris Habitat For Humanity	Mark-Built Properties at Summit Place I, LLC	Forst/McFarland	Tiger Baron LLC	The Housing Authority of Summit
Compliance Mechanism:	100% Affordable	100% Affordable	100% Affordable	100% Affordable	100% Affordable	100% Affordable
Compliance Mechanism #2 (if multiple):						
Round:	Third Round	Third Round	Third Round	Third Round	Second Round	Third Round
Block (if multiple separate by commas):	246	3908	2606	3901	4209	4210
Lot (if multiple separate by commas):	4	7.01	1.106 and 1.108	10	1	2
Address:	43 Glendale Avenue	30 Morris Avenue, Units A thru F	50 Parmley Place	13 North Street	120 Morris Avenue	31 Russell Place
Construction required to begin by (or mechanisms other than inclusionary development):						
Status:	Completed	Completed	Completed	Completed	Completed	Completed
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 completion:						
Date of issuance of C.O.:						
If "built," date controls began:	1/16/2014	2/15/2012	5/18/2012	10/1/2012	6/3/2013	1/30/2020
Length of Affordability Controls (years):	30	99	30	30	30	30
Administrative Agent or other entity responsible for affirmative marketing:	Our House Inc		Leckington Advisors, LLC	Leckington Advisors, LLC	Home First	The Housing Authority of Summit
Contribution (for payments in lieu)						
Total Affordable Housing Units Proposed	4	6	2	3	2	2
Total Affordable Housing Units Completed to Date	4	6	2	3	2	2
Type of Affordable Units:						
Family	0	6	2	3	0	2
Family For-Sale		6				
Family Rental			2	3		2
Senior	0	0	0	0	0	0
Senior For-Sale						
Senior Rental						
Supportive/Special needs	4	0	0	0	2	0
Supportive For-Sale						
Supportive Rental	4				2	

#### 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	2	2	0	1
Very Low-Income:						
Low-Income:				1		1
Moderate-Income:			2	1		
3+ BR Affordable Units	0	6		1	0	1
Very Low-Income:						
Low-Income:		3				1
Moderate-Income:		3		1		
Supportive/Special Needs Units:	4	0	0	0	2	0
Very Low-Income:	4					
Low-Income:					2	
Moderate-Income:						

### 3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	708-710 Springfield Ave	785 Springfield Ave	545 Morris Ave	Sunrise Assisted Living	27-31 Euclid Avenue	86 Park Ave. #103 (formerly 4-6 Ashwood)
Project developer:	The Hilltop Parmley Partners, LP	Providence Crossing	DP Morris Associates, LLC	Summit PropCo LLC		Carlifati LLC
Compliance Mechanism:	100% Affordable		Inclusionary	Inclusionary	Market Rate	Inclusionary
Compliance Mechanism #2 (if multiple):						
Round:	Third Round	Third Round	Third Round	Third Roud		Third Round
Block (if multiple separate by commas):	2901	1604	404	201	1905	4006
Lot (if multiple separate by commas):	24	6	1-4,103, 104, 214, 215	8-11	7-9	2,02
Address:	708-710 Springfield Ave	785 Springfield Ave	545 Morris Ave	14-26 River Road	27-31 Euclid Avenue	86 Park Avenue
Construction required to begin by (or mechanisms other than inclusionary development):						
Status:	Completed	Completed	Completed	Completed	Completed	Partial Completion
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 completion:						
Date of issuance of C.O.:						
If "built," date controls began:	6/1/2012		8/25/2009	7/10/2020		4/7/2021
Length of Affordability Controls (years):	30	30	30	State Mandated 10%		
Administrative Agent or other entity responsible for affirmative marketing:	Leckington Advisors, LLC	Leckington Advisors, LLC		Summit PropCo LLC		
Contribution (for payments in lieu)						
Total Affordable Housing Units Proposed	4	2	4	8	1	2
Total Affordable Housing Units Completed to Date	4	2	4	8	0	1
Type of Affordable Units:						
Family	4	2	4	0	0	0
Family For-Sale						
Family Rental	4	2	4			
Senior	0	0	0	0	0	0
Senior For-Sale						
Senior Rental						
Supportive/Special needs	0	0	0	8	0	0
Supportive For-Sale						
Supportive Rental				8		

#### Bedroom/Income Splits:

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

### 3. PRIOR AND THIRD ROUND MONITORING

Site / Program Name:	The Beacon	Habitat For Humanity	2 Ashwood	412 Morris Avenue
Project developer:	New Darlington LLC	Habitat for Humanity of Morris County	TBD	K&R Real Estate LLC
Compliance Mechanism:	Inclusionary	100% Affordable	100% Affordable	100% Affordable
Compliance Mechanism #2 (if multiple):				
Round:	Third Round	Third Round	Third Roud	Third Round
Block (if multiple separate by commas):	2608	4208	2	1302
Lot (if multiple separate by commas):	11	1	4006	45.12
Address:	123, 125, 127 Summit Avenue	146 Morris Avenue	2 Ashwood	412 Morris Avenue, Apartment 12
Construction required to begin by (or mechanisms other than inclusionary development):				
Status:	Completed	Under Construction	Predevelopment	Completed
If project has site plan /or subdivision approval, date building permits received		1/13/2022		
If "approved but not built" or "under construction," date of site plan and/or		6/13/2019		
If "under construction," expected date of completion:		10/1/2023		
Date of issuance of C.O.:				
If "built," date controls began:	4/2/2020			4/2/2020
Length of Affordability Controls (years):	30			30
Administrative Agent or other entity responsible for affirmative marketing:	Leckington Advisors, LLC	Habitat for Humanity of Morris County	TBD	
Contribution (for payments in lieu)				
Total Affordable Housing Units Proposed	3	12	2	1
Total Affordable Housing Units Completed to Date	3	12	2	1
Type of Affordable Units:				
Family	3	12	2	0
Family For-Sale		12		
Family Rental	3		2	
Senior	0	0	0	0
Senior For-Sale				
Senior Rental				
Supportive/Special needs	0	0	0	0
Supportive For-Sale				
Supportive Rental				

#### Bedroom/Income Splits:

1 BR/or Efficiency Affordable Units	1	0	0	0
Very Low-Income:	1			
Low-Income:				
Moderate-Income:				
2 BR Affordable Units	1	0	1	1
Very Low-Income:	1			
Low-Income:				1
Moderate-Income:			1	
3+ BR Affordable Units	1	12	1	0
Very Low-Income:				
Low-Income:		7	1	
Moderate-Income:	1	5		
Supportive/Special Needs Units:	0	0	0	0
Very Low-Income:				
Low-Income:				
Moderate-Income:				

### 3. PRIOR AND THIRD ROUND MONITORING

OVERALL PRIOR AND THIRD ROUND SUMMARY		
	NUMBER	PERCENT
<b>Total Units</b>	54 -	
Very-Low Income Units	14	26%
Low-Income	23	43%
Moderate-Income	17	31%
Family	40	74%
Senior	0	0%
Supportive/Special Needs	14	26%
For Sale	18	33%
Rental	36	67%

#### **4. VERY LOW INCOME REPORTING**

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.