

## 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
<b>REVENUE SUMMARY</b>			
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>\$ 1,752,737</b>	<b>\$ -</b>	<b>\$1,752,737</b>

<b>EXPENDITURE SUMMARY</b>			
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>\$ 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
Worrall 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>

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

HOUSING ACTIVITY: Date in Approved Spending Plan to Present		
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



**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 (for 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						
If "under construction," expected date of 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:**

<b>1 BR/or Efficiency Affordable Units</b>	0	0	0	0	0	0
Very Low-Income:						
Low-Income:						
Moderate-Income:						
<b>2 BR Affordable Units</b>	0	0	2	2	0	1
Very Low-Income:						
Low-Income:				1		1
Moderate-Income:			2	1		
<b>3+ BR Affordable Units</b>	0	6		1	0	1
Very Low-Income:						
Low-Income:		3				1
Moderate-Income:		3		1		
<b>Supportive/Special Needs Units:</b>	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 Parnley Partners, LP	Providence Crossing	DP Morris Associates, LLC	Summit PropCo LLC		Carifati LLC
Compliance Mechanism:	100% Affordable		Inclusionary	Inclusionary	Market Rate	Inclusionary
Compliance Mechanism #2 (if multiple):						
Round:	Third Round	Third Round	Third Round	Third Round		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 (for 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						
If "under construction," expected date of 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:**

<b>1 BR/or Efficiency Affordable Units</b>	1	0	1	0	0	0
Very Low-Income:			1			
Low-Income:	1					
Moderate-Income:						
<b>2 BR Affordable Units</b>	2	0	2	0	0	1
Very Low-Income:						
Low-Income:	2		1			
Moderate-Income:			1			1
<b>3+ BR Affordable Units</b>	1	0	1	0	0	0
Very Low-Income:						
Low-Income:	1					
Moderate-Income:			1			
<b>Supportive/Special Needs Units:</b>	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 Round	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 (for 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 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:

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

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)
Our House/Group Home	4	4		Special Needs
DP Morris Associates, LLC/Inclusionary	4	1		Family
New Darlington LLC/Inclusionary	3	1		Family
Sunrise Assisted Living/Inclusionary	8	8		Special Needs
<b>Total</b>	19	14	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.