

***Township of Medford***  
***ANNUAL REPORT***  
***FOR THE THIRD ROUND HOUSING ELEMENT AND FAIR SHARE HOUSING PLAN***  
***August 2021***

**Purpose**

Paragraph 17 of the Township of Medford’s Settlement Agreement with Fair Share Housing Center (“FSHC”) requires that the Township comply with the statutory annual reporting requirements of the Fair Housing Act (“FHA”) as follows: “On the first anniversary of the execution of this agreement, and every anniversary thereafter through the end of this agreement, the Township agrees to provide annual reporting of the status of all affordable housing activity within the municipality through posting on the municipal website with a copy of such posting provided to Fair Share Housing Center, using forms previously developed for this purpose by the Council on Affordable Housing or any other forms endorsed by the Special Master and FSHC. “

**Relevant Background**

In 2015, the Township of Medford filed a Declaratory Judgment Action seeking a declaration of its compliance with the Mount Laurel doctrine and Fair Housing Act of 1985, N.J.S.A. 52:270-301 et seq. The matter proceeded as a declaratory judgment action in accordance with In re N.J.A.C. 5:96 and 5:97, supra. Through the declaratory judgment process, the Township and FSHC agreed to settle the litigation and to present that settlement to the trial court with jurisdiction over this matter to review, recognizing that the settlement of Mount Laurel litigation is favored because it avoids delays and the expense of trial and results more quickly in the construction of homes for lower income households.

The Township entered into a Settlement Agreement with FSHC on November 15, 2016, which was amended on May 10, 2017, and approved by Order of the Court dated June 20, 2017, after the required Fairness Hearing. Compliance hearings were held by the Burlington County Superior Court, Law Division under the supervision of the Court Master, and, on September 15, 2020, the Hon. Jeanne T. Covert, A.J.S.C. entered a Final Order of Compliance and Judgment of Repose as to the Township's Rehabilitation Obligation, its Prior Round Obligation (1987-1999), and its Third Round Obligation (consisting of both its Gap Obligation for 1999-2015 and its Prospective Need Obligation for 2015-2025), and granted permanent immunity to the Township from "builders remedy" affordable housing litigation.

**Rehabilitation Program(s) Update**

The Township of Medford has a Rehabilitation Obligation of 25 units.

**Owner Occupied Rehabilitation Program:**

The Township participates in the County of Burlington Home Improvement Program that is funded with County of Burlington Community Development Block Grant. The Township has entered into an inter-local services agreement with the County that demonstrates the County’s commitment to work with the Township in addressing its present need. The Township is actively marketing the Housing Rehabilitation Program by posting the program’s flyer on the Township website, including in tax billings and posting on Township social media websites. No units have been completed as of August 2021.

**Rental Rehabilitation Program**

The Township has requested that the Special Master determine whether it is necessary for the Township of Medford to participate in the County-Wide Rental Rehabilitation program that is currently be administered by the Burlington County Bridge Commission and their consultant, Community Grants Planning & Housing (CGP&H). The Township anticipates an estimated need of four (4) rental rehabilitation cases should the Court Master direct the Township to participate in the County program.

The Township will set aside \$40,000.00 in their Affordable Housing Trust Fund Spending Plan for a minimum amount of \$10,000 per housing unit for a rental rehabilitation program designed to rehabilitate 4 units. No units have been completed as of August 2021.

**Realistic Opportunity Review**

The Township s in the process of addressing its Prior Round Obligation (1987-1999) and Third Round Obligation (1999-2025) as follows:

<u>Mechanism</u>	<u>Description</u>	<u>Ordinance Adopted (Yes/No)</u>	<u>Status</u>	<u>Notes/Additional Information</u>
Supportive Living Arrangements (Group Homes)	21 Units (Prior Round 20 Units (Third Round)	N/A	41 Units Completed and Occupied	
Habitat for Humanity	2 For Sale affordable (Third Round)	N/A	2 Units Completed and Occupied	133 Old Marlton Pike 135 Old Marlton Pike
The Heights at Medford - The Willows at Medford (Formerly the Heights at Medford)	Ingerman - 100% Affordable Family – Rental Tax Credit Proj.	N/A	60 Units Completed and Occupied	311 Stephens Rise

Medford Leas (Creekside) The Willows at Creekside(Formerly Medford Leas-Creekside)	Ingerman - 100% Affordable Development Family – Rental Tax Credit Project	N/A	32 Units Completed and Occupied	235 Rt. 70
Wyngate	Inclusionary - Age Restricted For Sale	N/A	30 Units Completed and Occupied	
Heritage	Inclusionary - Age Restricted For Sale	N/A	25 Units Completed and Occupied	
Wildflowers	Inclusionary - Age Restricted For Sale	N/A	10 Units Completed and Occupied	
Medford Senior Residences	MEND – 100% Senior Rental	N/A	36 Units Completed and Occupied	8 Jones Road
Hartford Square Site	Volunteers of America – 100% Affordable Rental	N/A	71 Units – Under Construction	Route 70 and Hartford Road
Flying W Site	Inclusionary Family Rental	N/A	90 Units Proposed	Fostertown Road
Tofamo (Timber Ridge at Medford)	Inclusionary Family Rental	N/A	48 Units Under Construction	Hartford Road
Arc Wheeler (Autumn Park)	Inclusionary Family Rental	N/A	90 Units Under Construction	Evesboro-Medford Road (County Rte 618)
Freeco	Inclusionary Family Rental	N/A	24 Units Proposed	
Medford Walk Settlement Sales	Inclusionary For Sale	N/A	5 Units Proposed	Himmelein and Medford-Oliphant’s Mill Road.

The Township has provided a realistic opportunity for the development of the Third Round projects to satisfy its obligations under the Fair Share settlement as outlined in its submissions to the Court to obtain its Final Judgment of Compliance and Repose. Specifically, the Arc Wheeler (now Autumn Park), Tofamo (now Timber Ridge at Medford) and Harford Square (now Hartford Village-Volunteers of America) projects have received all required approvals pursuant to Redevelopment Plans approved by the Medford Township Council and preliminary and final site plan/subdivision approvals from the Medford Township Planning Board. The Timber Ridge at Medford project, which will provide 48 affordable units, is under construction and homes are being built. The 100% affordable Hartford Village project (now 70 units plus an affordable caretaker unit, 71 total) has received tax credit financing and is under construction. Autumn Park, which will provide 90 affordable units, is also under construction and homes are being built. The portion of the Flying W property in Medford Township, the development of which will provide 90 affordable units to be constructed entirely in Medford Township, has been rezoned for affordable housing through the adoption of a Redevelopment Plan approved by the Medford Township Planning Board by adoption of Resolution 10-2021 after public hearing on March 24, 2021 and by the Medford Township Council by adoption of Ordinance 2021-5 after public hearing on April 6, 2021. The redeveloper is preparing its application and plans to submit to the Planning Board for preliminary and final subdivision approval with approvals expected by the end of calendar year 2021.

***Very-Low Income Analysis***

The 2016 Settlement Agreement states that 13% of all units referenced in the Agreement constructed after July 1, 2008 shall be very-low-income units. Half of those units must be available for families. The Township is satisfying its very low-income requirement as outlined in its settlement agreement with FSHC:

<b><u>Development</u></b>	<b><u>Very Low Units</u></b>	<b><u>Total Units</u></b>	<b><u>Percentage</u></b>	<b><u>Status</u></b>
MEND	4	36	11.1	Complete
Hartford Square/VOA	9	70	12.9	Under Construction
Tofamo	6	48	12.5	Under Construction
Arc Wheeler	12	90	13.3	Under Construction
Flying W	12	90	13.3	Proposed

In total, the MEND (36 units), Tofamo (48 units), ARC Wheeler (90 units), Flying W (90 units) and Hartford Square/VOA (70 units) are providing a total of 334 affordable housing units. Of this total, 43, or 12.9 percent, shall be affordable to very low-income households.

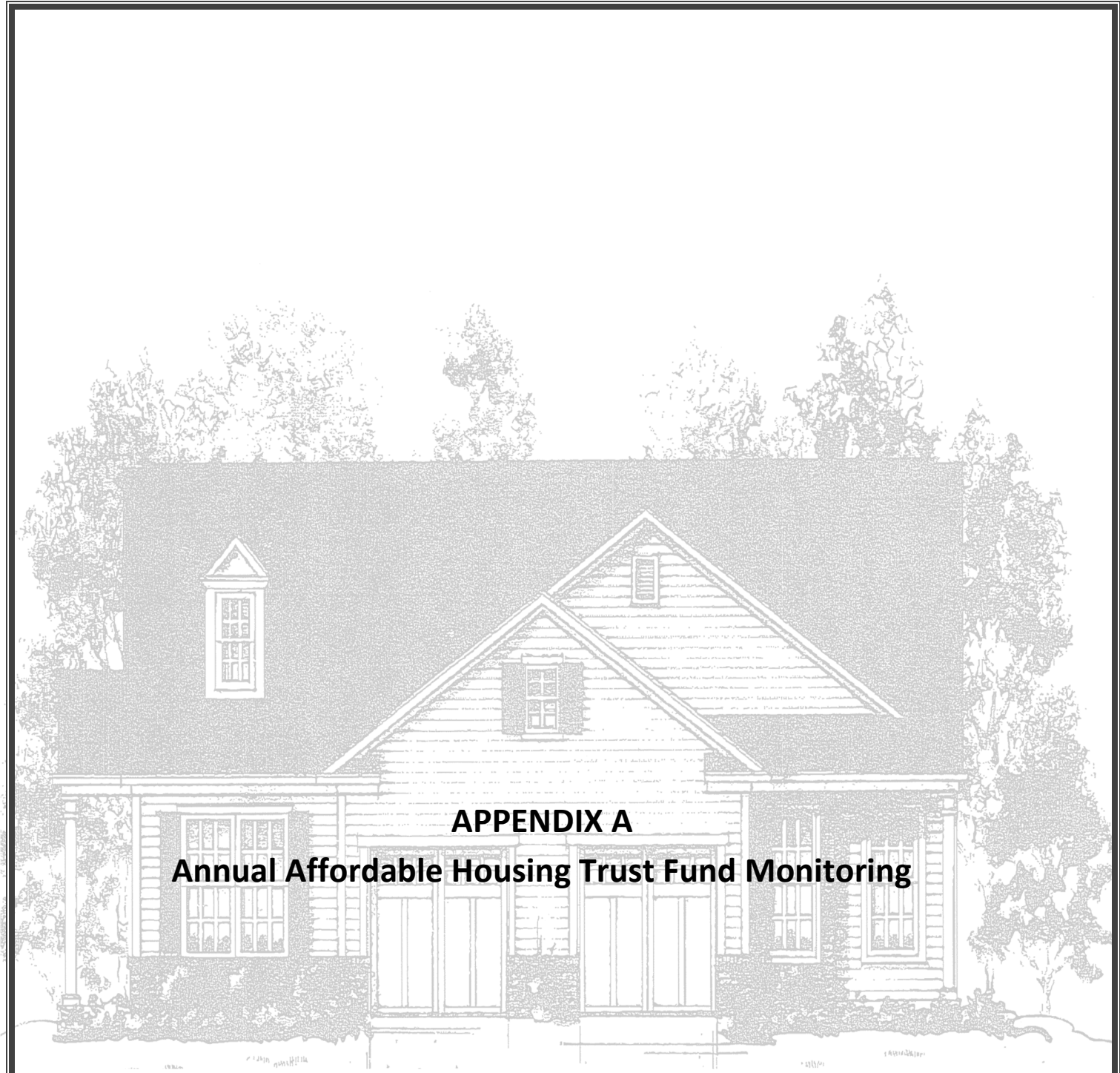
Medford will also satisfy its very low-income housing requirement with the 20 bedrooms located within the special needs facilities, operated by Family Services and Allies, located at:

<b>Address</b>	<b>Provider</b>	<b>Bedrooms</b>
10 Eaves Mill Road	Family Services	2 bedrooms
67 Eaves Mill Road	Family Services	2 bedrooms
85 Union Street	Family Services	3 bedrooms
19 Evergreen Trail	Family Services	5 bedrooms
101 Hickory Lane	Allies	4 bedrooms
231 Pine Boulevard	Allies	4 bedrooms

In summary, with a total of 63 very low-income units of a total of 364 (344 units plus 20 bedrooms in group living facilities) total affordable units, 17.3 percent of all affordable units are affordable to very low-income households.

**Conclusion**

The Township’s plan implementation continues to create a realistic opportunity where that standard is applicable.



**APPENDIX A**  
**Annual Affordable Housing Trust Fund Monitoring**

**1. GENERAL INFORMATION AND TRUST FUND MONITORING**

MUNICIPALITY NAME:	Township of Medford
COUNTY:	Burlington County
Date through which funds reported:	4/30/2021
Name of person filling out form and affiliation/role:	Katherine Packowski, Triad Associates (Administrative Agent)
Date of filling out form:	8/23/2021
Email:	<a href="mailto:kpackowski@triadincorporated.com">kpackowski@triadincorporated.com</a>
Municipal Housing Liaison for municipality:	Robin D. Sarlo, CFO, CTC, QPA Joseph Rahman
Email:	<a href="mailto:jarahman@medfordtownship.com">jarahman@medfordtownship.com</a>
Income Limits Year Being Used by Municipality*:	2020

**TRUST FUND INFORMATION**

	Inception to April 30, 2020	May 1, 2020 to April 30, 2021	Total
<b>REVENUE SUMMARY</b>			
Barrier Free Escrow	\$0.00		\$0
Development Fees	\$2,035,071.52	\$39,661.64	\$2,074,733
Interest Earned	\$146,546.64	\$709.77	\$147,256
Other Income	\$270,000.00		\$270,000
Payments-in-Lieu of Construction			\$0
<b>TOTAL</b>	<b>\$2,451,618.16</b>	<b>\$40,371.41</b>	<b>\$2,491,990</b>

<b>EXPENDITURE SUMMARY</b>			
Administration**	\$ 392,368	\$ 74,526	\$466,894
Affordability Assistance***	\$ -		\$0
Very Low-Income Affordability Assistance			\$0
Barrier Free Conversions			\$0
Housing Activity	\$ 1,446,400	\$ 433,365	\$1,879,765
<b>TOTAL</b>	<b>\$ 1,838,768</b>	<b>\$ 507,891</b>	<b>\$2,346,659</b>

<b>ADMINISTRATION: Date in Approved Spending Plan to Present</b>		
Consulting Fees (Planner)(Bernard & Clarke)	\$149,596.28	\$47,936.25
Legal Fees(Attorney)	\$235,945.15	\$22,015.00
Other Admin Costs(Administrative Agent)	\$6,826.25	\$4,575.00
<b>TOTAL</b>	<b>\$392,367.68</b>	<b>\$74,526.25</b>

<b>AFFORDABILITY ASSISTANCE: Date in Approved Spending Plan to Present</b>		
	0	
<b>TOTAL</b>	<b>0</b>	<b>\$0</b>

<b>HOUSING ACTIVITY: Date in Approved Spending Plan to Present</b>		
Amended Spending Plan Resolution 8/2/12	\$521,400.00	
Habitat for Humanity	\$70,000.00	
MEND Senior Housing	\$180,000.00	
RCA - Glassboro	\$625,000.00	
Rehabilitation	\$50,000.00	
Volunteers of America 100% Affordable Dev		\$ 433,365
<b>TOTAL</b>	<b>\$1,446,400.00</b>	<b>\$433,365</b>

Balance as of 4/30/2020 \$612,850.48 Balance as of 4/30/2021 \$145,331

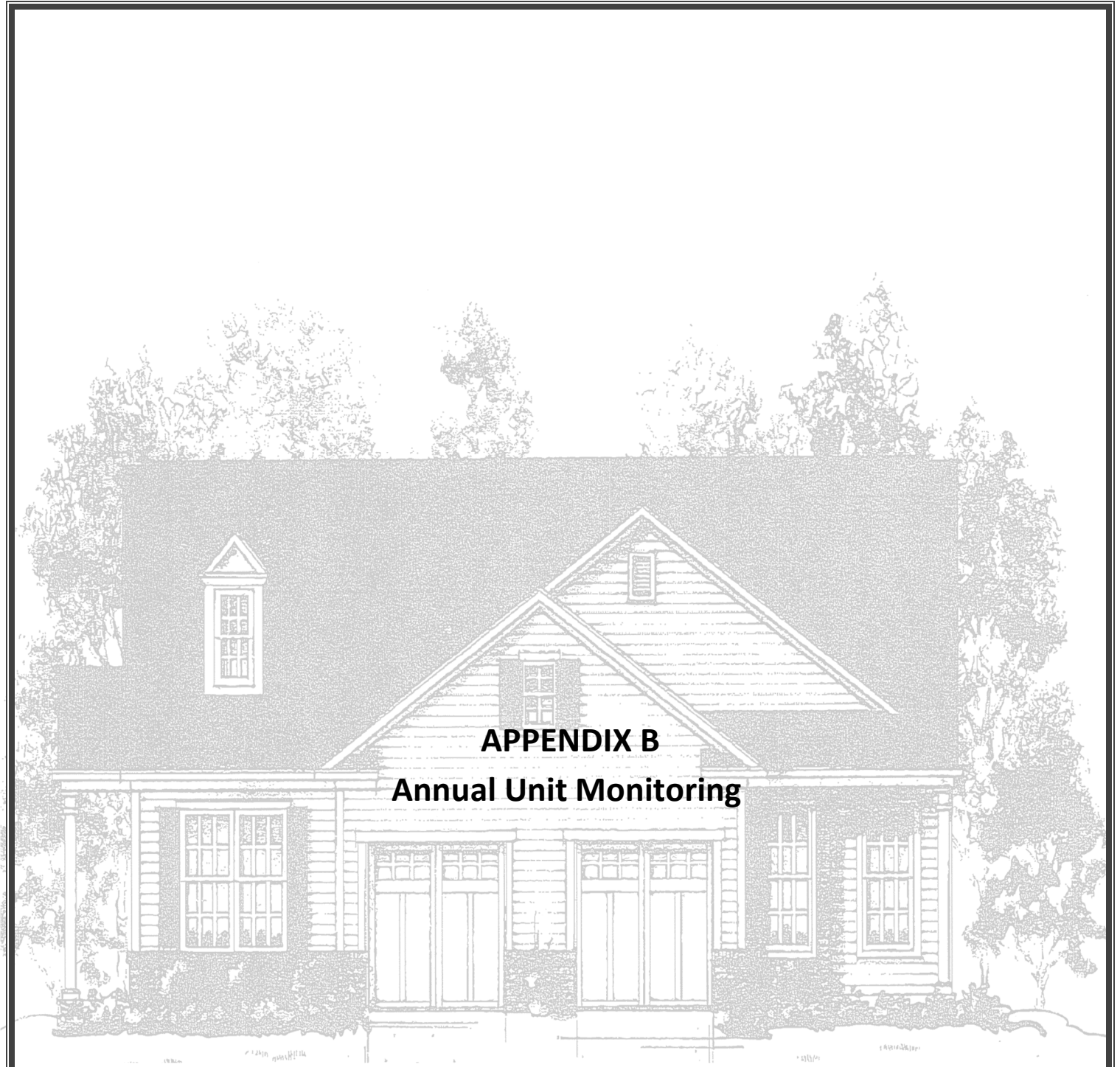
Comments:

\*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





**APPENDIX B**  
**Annual Unit Monitoring**



**2. REHABILITATION**

<b>Total Third Round rehabilitation obligation</b>	<b>25</b>
<b>Rehabilitation program administrator(s) with email, phone number, and address:</b> (if multiple rehab programs list administrator for each)	<b>Burlington County Community Development Department</b>
<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>Through August 2020</b>

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)
No Units Completed as of August 2021																			

**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:	Group Homes	The Heights at Medford - The Willows at Medford (Formerly the Heights at Medford)	Medford Leas (Creekside) The Willows at Creekside(Formerly Medford Leas-Creekside)	Wyngate	Heritage	Medford Senior Residences	Wildflowers	Habitat for Humanity (Whitesell Houses)	Hartford Square Site	Flying W Site	Tofamo (Timer Ridge at Medford)	Arc Wheeler(Autumn Park)	Medford Walk	Freeco	
Project developer:	See attached spreadsheet	Ingerman	Ingerman	Bob Meyer	Bob Meyer	Mend	Orleans	Habitat for Humanity	Volunteers of America		Ingerman and Timber Ridge at Medford, LLC	Autumn Park Urban Renewal, LLC			
Compliance Mechanism:	Supportive Housing (Group Homes)	100% Affordable Development Family - Rental	100% Affordable Development Family - Rental	Inclusionary - Age Restricted For Sale	Inclusionary - Age Restricted For Sale	100% Affordable Development Age Restricted - Rental	100% Affordable Development Age-Restricted - Rental	100% Affordable Development Age-Restricted - For Sale	100% Affordable Development - Age Restricted - For Rent - Tax Credit	Inclusionary Family Rental	Inclusionary Development - 48 Affordable Rental Units	Inclusionary Family Rental	Inclusionary For Sale	Inclusionary Rental	
Compliance Mechanism #2 (if project has multiple):									100% Affordable Development Age-Restricted - Rental (5) 1br units at 20% AMI are supporting housing rental units that are reserved for homeless individuals with a preference for veterans.						
Round:	Prior Round & Third Round	Prior Round	Prior Round	Prior Round	Prior Round	Third Round	Prior Round	Third Round	Third Round	Third Round	Third Round	Third Round			
Block (if multiple separate by commas):	See attached spreadsheet								Lot 14.01 of Block 401,	Lots 1, 3 and 4 in Block 303 and Lot 5.01 in Block 301	Lot 13.01 of Block 401, and Lots 2 and 7 of Block 403	Lot 9.02 of Block 401			
Lot (if multiple separate by commas):	See attached spreadsheet														
Address:	See attached spreadsheet	311 Stephens Rise Block 4107/11/1	235 Rt. 70 Block 805/22	Keswick Path, Liverpool Way, Moorelinch Blvd Block 404/22(all different)	Doddington, Pilton, Binstead, Block 404-31(all different)	8 Jones Road; Block 904-; L: 4-03;	Broadview, Windyknoll Block 403-02; L: 6-	133 Old Mariton Pike 135 Old Mariton Pike Block 903-01; L: 16-	Route 70 and Hartford Road	Fostertown Road	Hartford Road	Medford-Evesboro Road	Himmelein and Medford-Oliphant's Mill Road. It is Block 909, Lot 1.01		
Construction required to begin by (for mechanisms other than inclusionary development):															
Status:	Completed	Completed	Completed	Completed	Completed	Completed	Completed	Completed	Under Construction	Planning Board Application in progress	Under Construction	Under Construction	Proposed	Proposed	
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:															
Date of issuance of C.O.:	See attached spreadsheet	12/9/2008	12/5/2007	CO 2011 through 2018	CO 2013 to present	CO 9/14/09	CO 11/2/11	CO 4/1/10							
If "built," date controls began:															
Length of Affordability Controls (years):	See attached spreadsheet	30	30	30	30	30	30	30	30	30	30	30	30	30	
Administrative Agent or other entity responsible for affirmative marketing:	Group Home Provider: See attached spreadsheet	Ingerman (Tax Credit)	Ingerman (Tax Credit)	Triad Associates 1301 W Forest Grove Road Vineland, NJ	Triad Associates 1301 W Forest Grove Road Vineland, NJ	Mend	Triad Associates 1301 W Forest Grove Road Vineland, NJ	Habitat for Humanity	Volunteers of America		Ingerman Powell Lane Collingswood, NJ	5 Triad Associates/Autumn Park Urban Renewal			
Contribution (for payments in lieu)								70,000							
Total Affordable Housing Units Proposed	41	60	32	30	25	36	10	2	71	90	48	90	5	18	
Total Affordable Housing Units Completed to Date	41	60	32	30	25	36	10	2	71						
Type of Affordable Units:															
Family	0	60	32						2						
Family For-Sale	0								2						
Family Rental		60	32							71	90	48	90		
Senior	0			30	25	36	10								
Senior For-Sale	0			30	25	36	10								
Senior Rental	0							36							
Supportive/Special needs	41														
Supportive For-Sale	0														
Supportive Rental	41														

Bedroom/Income Splits:														
1 BR/ or Efficiency Affordable Units	0	0	6	0	0	30	0	0	66	0	0	0	0	0
Very Low-Income:						3			5					
Low-Income:			4			23			26					
Moderate-Income:			2			4			35					
2 BR Affordable Units	0	42	16	30	25	6	10	1	5	0	0	0	0	0
Very Low-income:						1			4					
Low-Income:			2	15	13	4	5							
Moderate-income:		42	14	15	12	1	5	1	1					
3+ BR Affordable Units	0	18	10	0	0	0	0	1	0	0	0	0	0	0
Very Low-Income:														
Low-Income:			1											
Moderate-Income:		18	9					1						
Supportive/Special Needs Units:	41	0	0	0	0	0	0	0	0	0	0	0	0	0
Very Low-Income:	41													
Low-Income:														
Moderate-Income:														

OVERALL PRIOR AND THIRD ROUND SUMMARY		
	NUMBER	PERCENT
Total Units	307	-
Very-Low Income Units	54	18%
Low-Income	93	30%
Moderate-Income	160	52%
Family	94	31%
Senior	101	33%
Supportive/Special Needs	41	13%
For Sale	67	22%
Rental	468	152%

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)
MEND 8 Jones Road	36	4		Senior
Hartford Square - VOA	70		9	Family
Tofamo	48		6	Family
Arc Wheeler	90		12	Family
Flying W	90		12	Family
Group Homes (Bedroom Units)	20	20		Special Needs
<b>Total</b>	354	24	39	

This tab provides reporting required on very low income units, i.e. units affordable to and reserved for households at or below See N.J.S.A. 52:27D-329.1.