



**UPPER DUBLIN**  
— T O W N S H I P —  
COMPREHENSIVE PLAN

**September 10, 2024**  
**Board of Commissioners Presentation**

# Purpose

UD Plan examines the priorities of the Township from 2010 and updates them by:

**Considering changing trends and needs that have changed or been modified since 2010.**

- Changes in how and where we work, resulting in changing commuting patterns and reducing demand for office space.
- Household size is decreasing, the population is aging, and the Township's households' median incomes are increasing.
- Climate change is occurring, felt through more frequent and severe weather events.

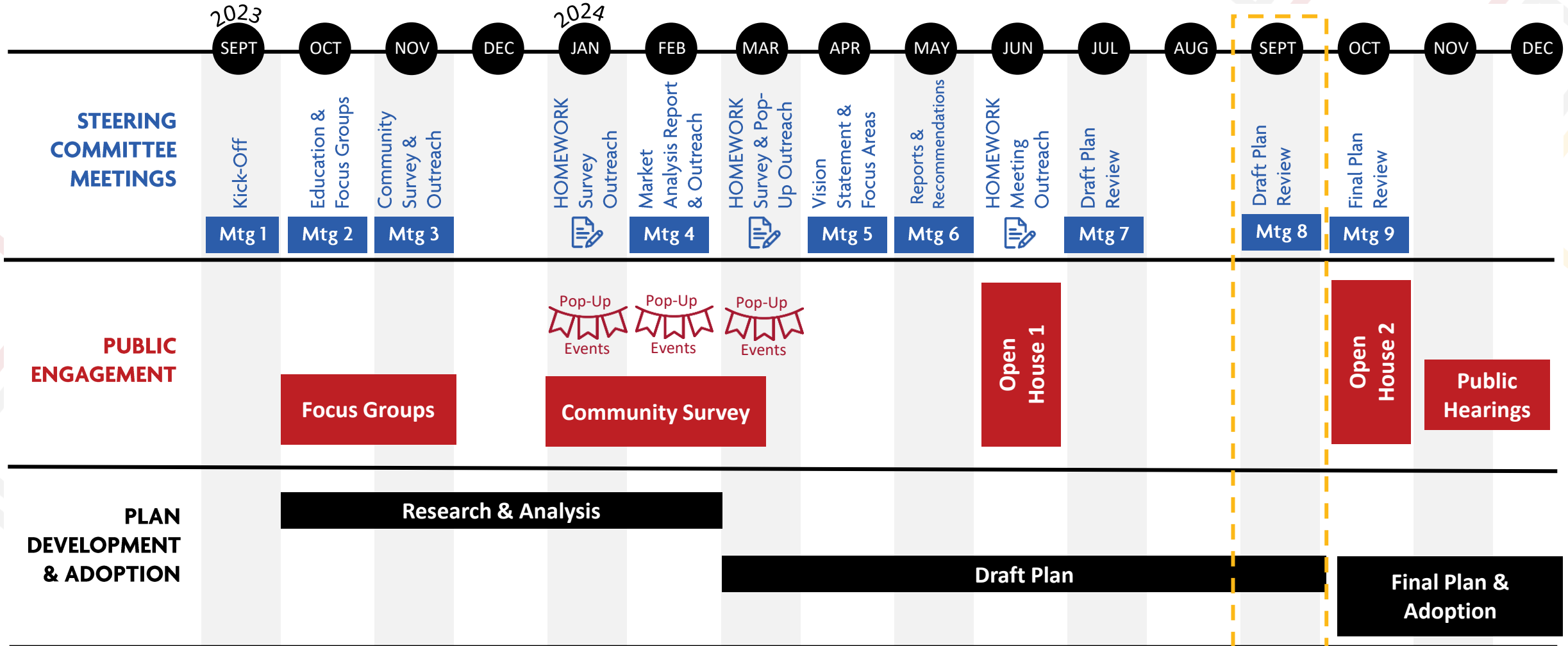
**Incorporating the pulse of the community.**

- New residents and changes in needs of long-time residents.
- Learned about the priorities of residents through a community-wide survey and pop-up engagement events.

**Focusing on implementation.**


- Implementable Comprehensive Plan Model supported by the Pennsylvania Department of Community and Economic Development (DCED).
- Focuses on top community priorities that practical and workable recommendations can address.
- Planning elements are all interrelated. The three Focus Areas (the three top priorities) require actions from multiple planning elements to accomplish their goals.
- Each action will be accompanied by a user-friendly implementation framework.

# Process




# Process Materials

**Focus Group Summary**  
November 2023




**UPPER DUBLIN**  
TOWNSHIP  
COMPREHENSIVE PLAN

**Community Engagement Report**  
April 2024



**UPPER DUBLIN**  
TOWNSHIP  
COMPREHENSIVE PLAN

**UPPER DUBLIN TOWNSHIP  
COMPREHENSIVE PLAN UPDATE**  
Market and Real Estate Analysis



Prepared For:  
Upper Dublin Township

Prepared By:  
4ward Planning Inc.  
May 2024 | Updated on August 1, 2024



**UPPER DUBLIN**  
TOWNSHIP  
COMPREHENSIVE PLAN

**June 13, 2024  
Open House**



# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

September 9, 2024





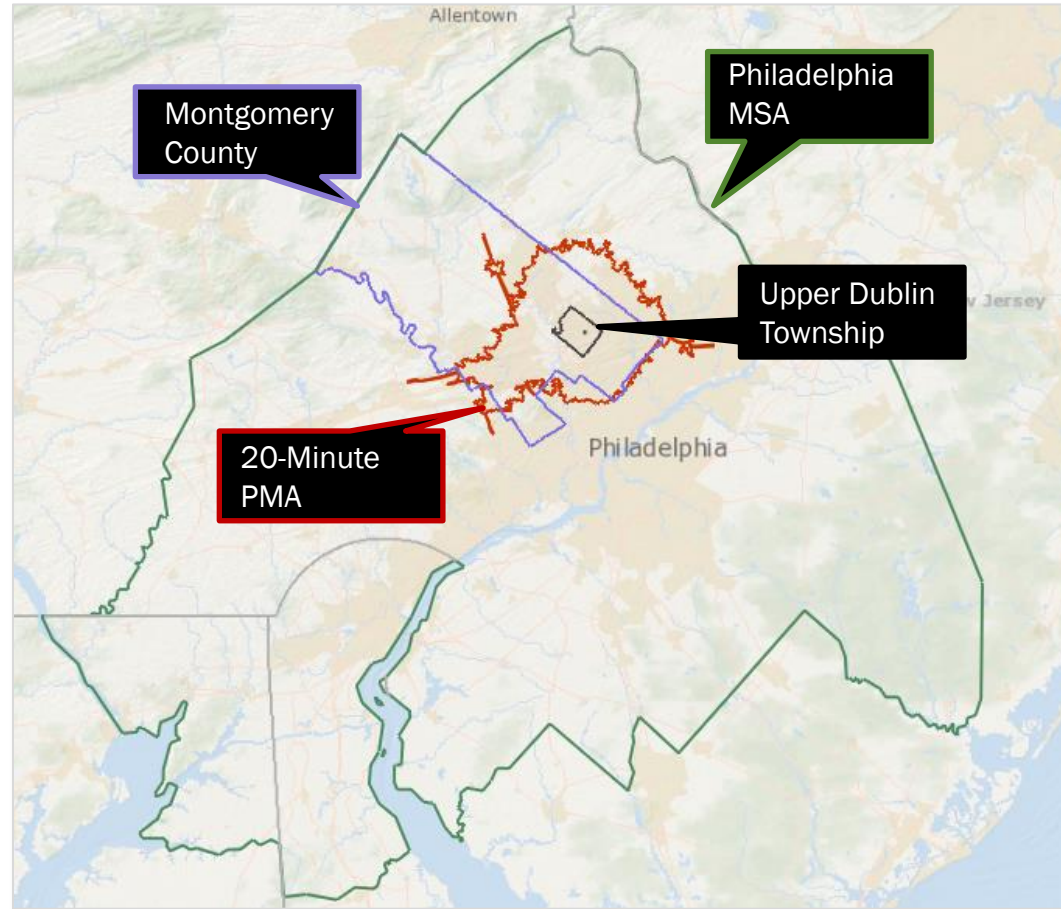
# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

September 9, 2024

### Socio-Economic Trends



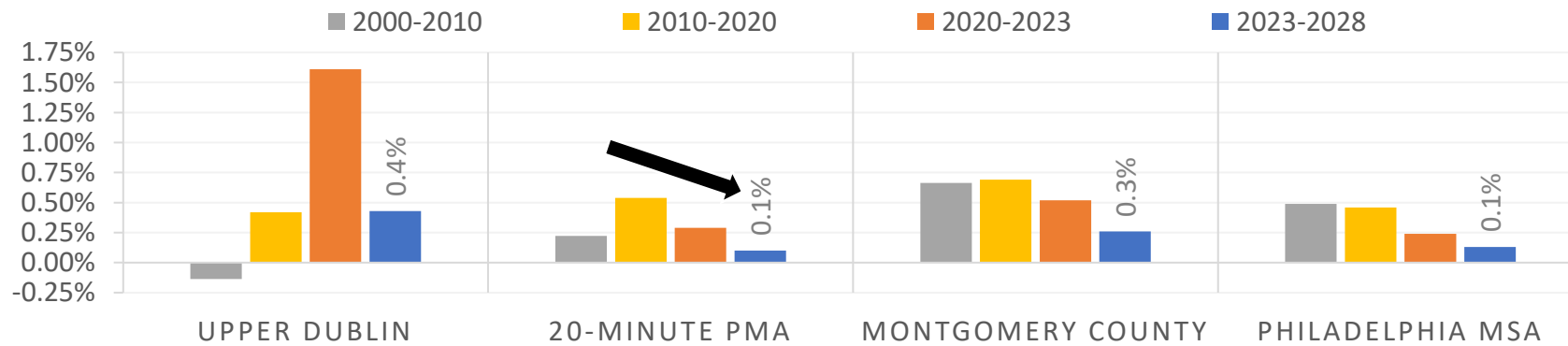


# POPULATION AND HOUSEHOLDS

## Population Trends, Estimates & Projections

Township	Counts			Estimates	Projections	2023-2028	
	2000	2010	2020	2023	2028	Change	Annualized % Change
Upper Dublin	25,920	25,569	26,665	28,085	28,691	606	0.43%
20-Minute PMA	619,928	633,651	668,869	675,230	678,513	3,283	0.10%
Montgomery County	750,097	799,874	856,553	871,229	882,409	11,180	0.26%
Philadelphia MSA	5,687,158	5,965,343	6,245,051	6,292,945	6,333,683	40,738	0.13%

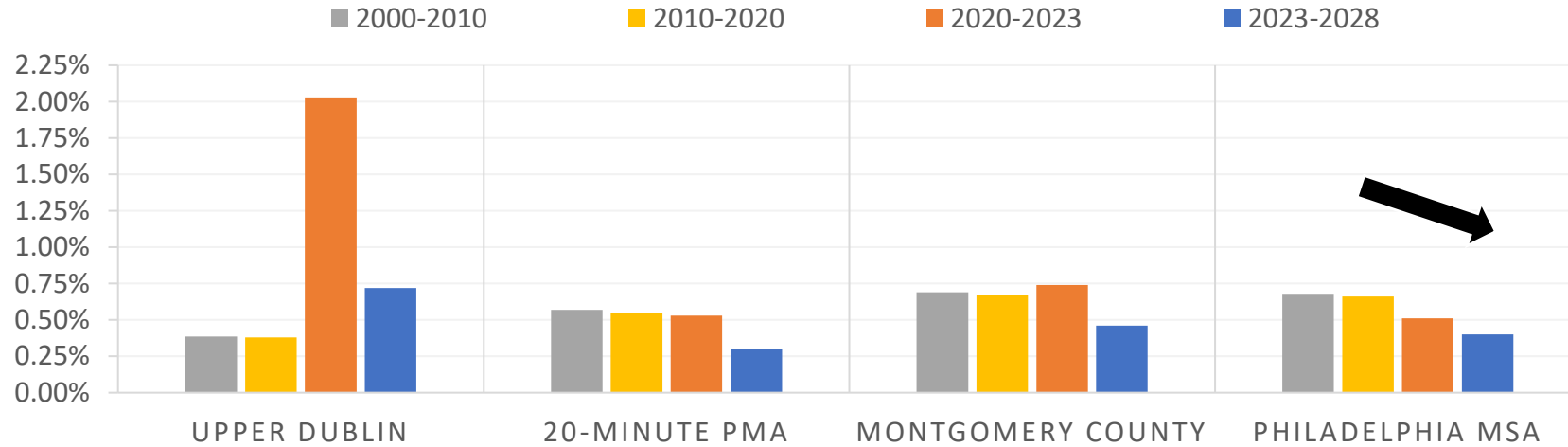
Source: Census; Esri





# POPULATION AND HOUSEHOLDS

Annualized Percent Household Formation Change Trends and Projections



**While annualized household formation is projected to be strongest in Upper Dublin, formation trends are generally flat for the broader market area.**

## POPULATION AND HOUSEHOLDS

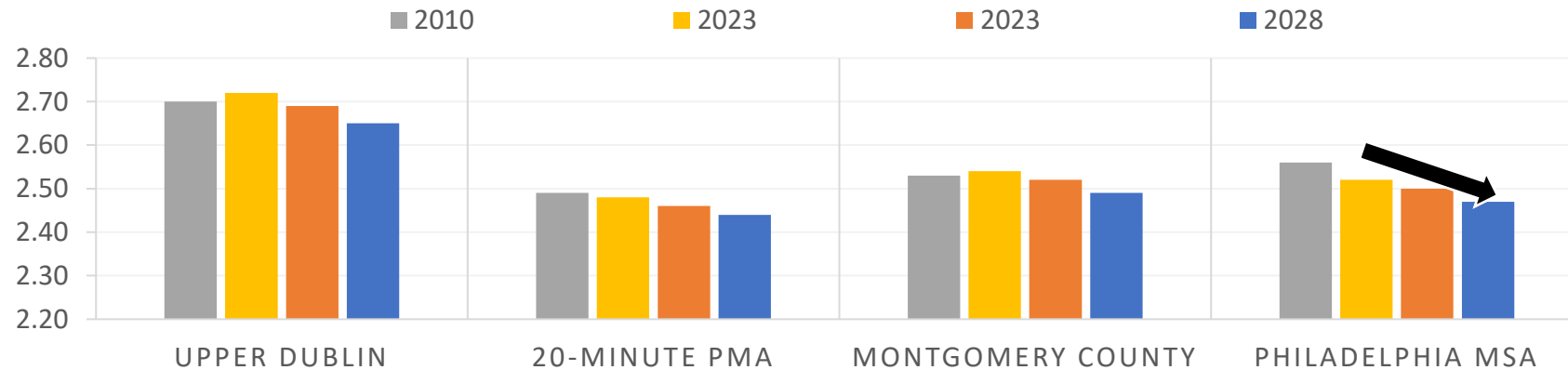
### Annualized Percent Household Change Trends and Projections

Township	Counts			Estimates	Projections	2023-2028	
	2000	2010	2020	2023	2028	Change	Annualized % Change
Upper Dublin	9,156	9,371	9,733	10,391	10,772	381	0.72%
20-Minute PMA	238,627	248,909	263,048	267,608	271,652	4,044	0.30%
Montgomery County	286,098	307,750	328,958	336,927	344,783	7,856	0.46%
Philadelphia MSA	2,134,406	2,260,312	2,413,835	2,453,801	2,503,881	50,080	0.40%

**Absent significant housing development, the number of households in the township is projected to increase by approximately 400 through 2028**

# POPULATION AND HOUSEHOLDS

## Household Size Trends and Projections

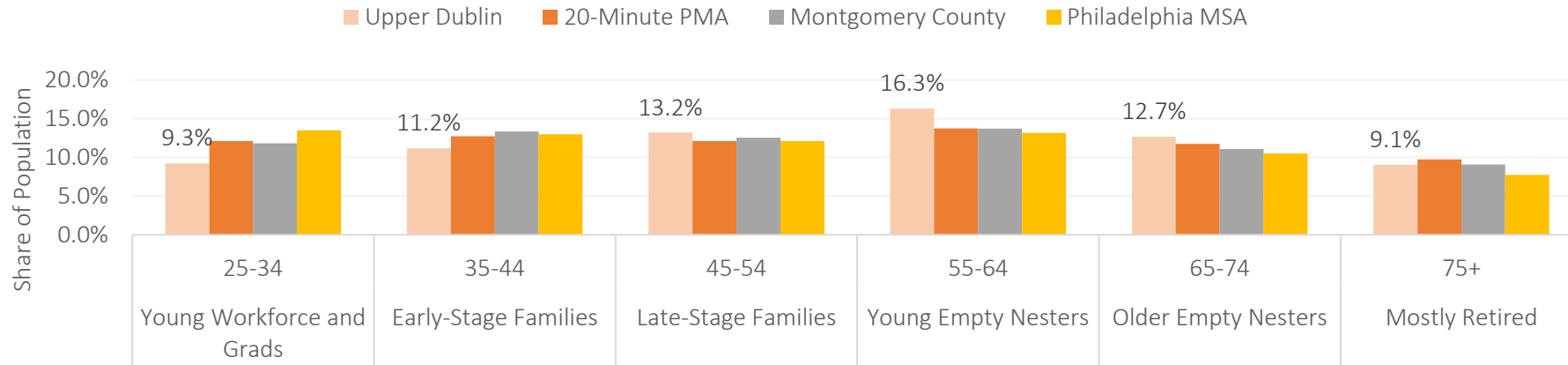


Source: Esri

**The trending pattern of smaller households locally and regionally suggests there will be increased demand for smaller housing units, such as townhomes and multi-family apartment units.**

# POPULATION AND HOUSEHOLDS

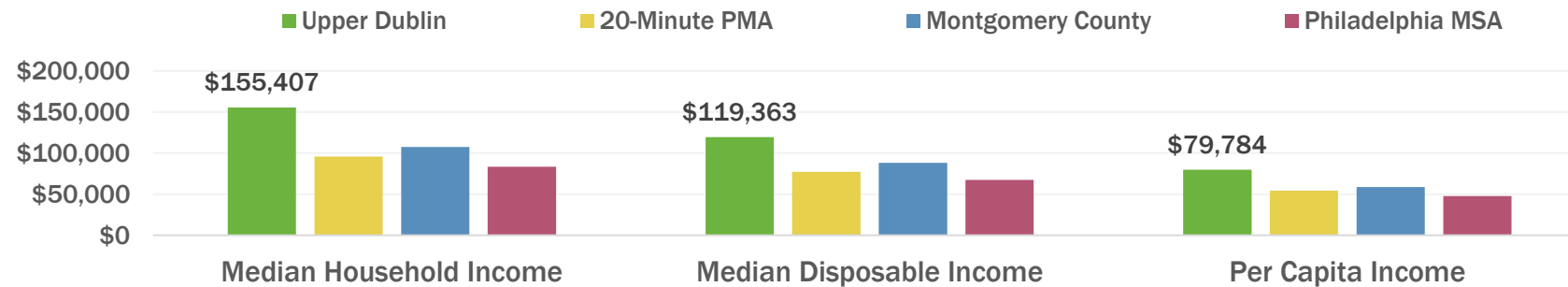
## Adult Population Distribution by Life Stage, 2023



**20 out of 100 residents in the township fell between the ages of 25 and 44, while 25 out of 100 in Montgomery County were in that age range as of 2023.**

## POPULATION AND HOUSEHOLDS

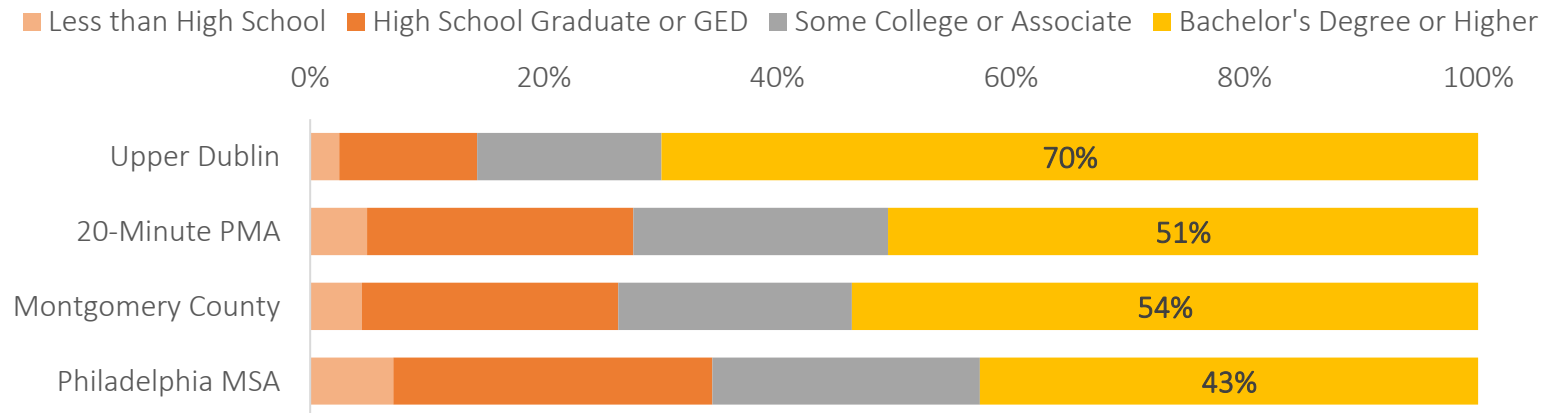
### Household Income Across Geographies, 2023



Upper Dublin Township is highly affluent and reflects both an older and well-educated demographic. In addition to attracting goods and service businesses seeking high income households, upward pressure on housing and rental prices is also a consequence.

## LABOR AND INDUSTRY

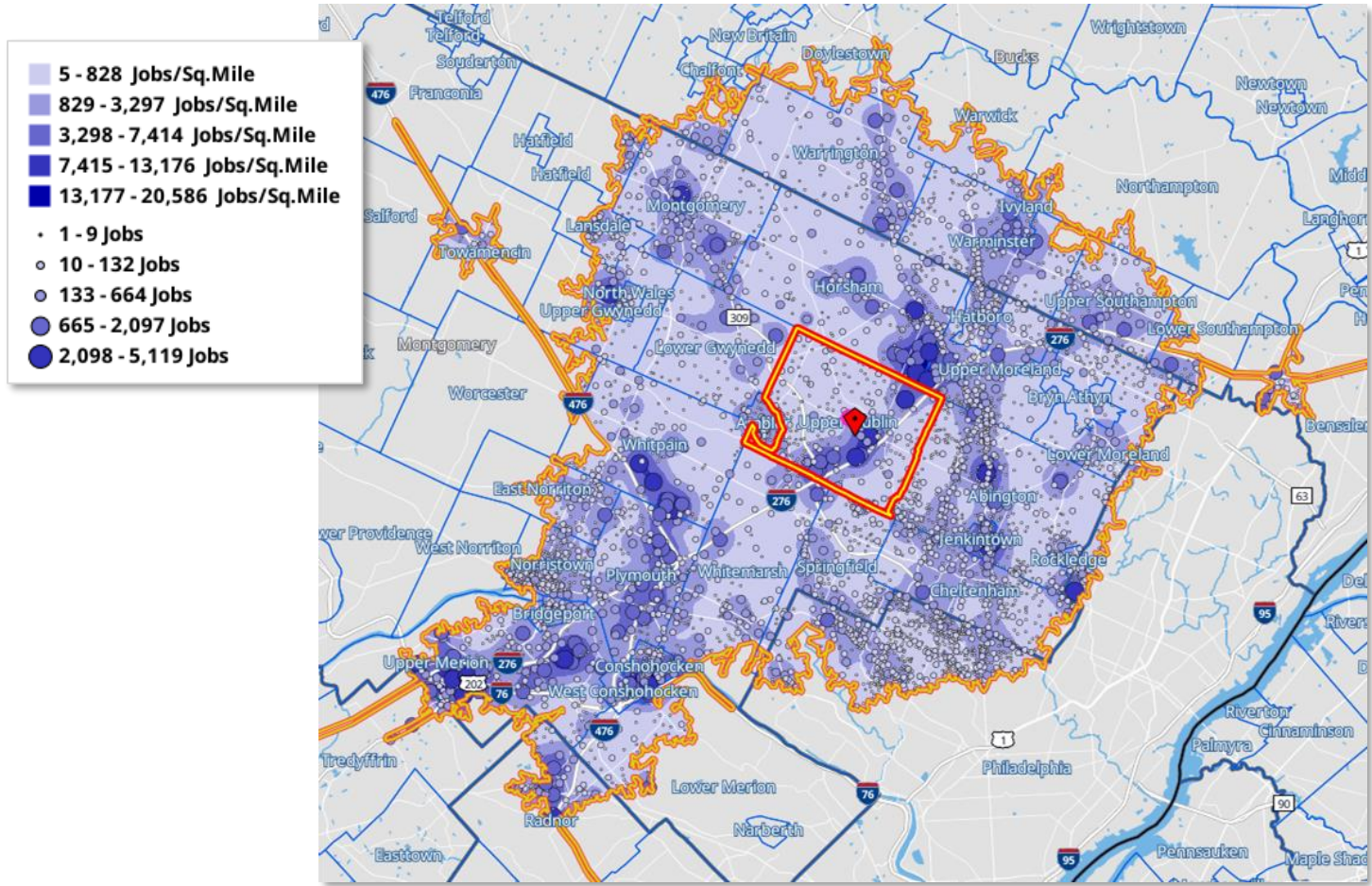
### Educational Attainment by Share of Adult Population (25+ Years)



**Based on the relatively high-level adult persons possessing a four-year degree or more, Upper Dublin and the immediately surrounding area has a high concentration of knowledge workers and senior level managers living locally.**

# LABOR AND INDUSTRY

## Employment Clusters within the 20-Minute PMA, 2021





# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

September 9, 2024







# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

September 9, 2024

### Commercial Real Estate



## COMMERCIAL REAL ESTATE

Office Vacancy and Asking Rent Trends – Philadelphia MSA



## COMMERCIAL REAL ESTATE

### Suburban Philadelphia Office Market Statistics – Q3 2023

Submarkets	Overall Vacancy Rate	Square Feet				Overall Avg. Asking Rent	
		Inventory	YTD Overall Net Absorption	YTD Leasing Activity**	Under Construction	All Classes*	Class A*
Bala Cynwyd	20.7%	2,718,024	-37,819	98,311	-	\$36.14	\$36.71
Southern Bucks County	23.1%	6,262,103	-117,354	132,204	-	\$25.34	\$27.68
Southern Route 202 Corridor	18.8%	6,199,423	-24,548	105,107	-	\$26.28	\$26.78
Delaware County	17.7%	4,561,028	-48,068	64,825	-	\$28.56	\$28.16
<b>Blue Bell/Ply. Mtg./Ft. Wash.</b>	<b>26.8%</b>	<b>11,737,868</b>	<b>-354,241</b>	<b>296,256</b>	<b>-</b>	<b>\$25.79</b>	<b>\$28.15</b>
Main Line	14.0%	3,570,734	-84,039	125,497	145,000	\$39.84	\$43.32
Conshohocken	20.7%	4,191,090	-208,725	132,121	-	\$36.77	\$37.51
Horsham/Willow Grove/Jenkt.	25.5%	5,221,411	-190,102	84,221	-	\$21.36	\$23.00
King of Prussia/Valley Forge	20.7%	17,875,353	-405,959	509,197	-	\$28.94	\$30.28
Suburban Philadelphia	21.7%	62,337,034	-1,470,855	1,547,739	145,000	\$27.94	\$29.94
Philadelphia MSA	20.8%	134,351,043	-3,111,835	3,281,180	912,000	\$29.05	\$31.38

\*Rental rates reflect full-service gross \*\*Does not include renewals.

Source: Cushman & Wakefield, Philadelphia Marketbeat, Office, Q3 2023

**Blue Bell/Ply. Mtg/Ft. Wash. Office Market features a Q4 2023 vacancy rate of 27.3 percent**

## COMMERCIAL REAL ESTATE

### Upper Dublin Township Office & Industrial Metrics – August 2024

	<u>Total Office S.F.</u>	<u>Available for Lease</u>	<u>Availability Rate</u>	<u>Total Vacancy Rate</u>
Upper Dublin Township	4,850,000	439,000	9.1%	11.3%
Fort Washington Office Park	2,950,000	439,000	NA	14.0%
Flex Industrial Space (in Park)	2,000,000	170,000	8.5%	8.5%

**Office vacancy within the Fort Washington Office Park and the township, generally, is relatively low when compared against the office submarket and the Philadelphia region.**

Source: Costar – August 1, 2024



# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

September 9, 2024





# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

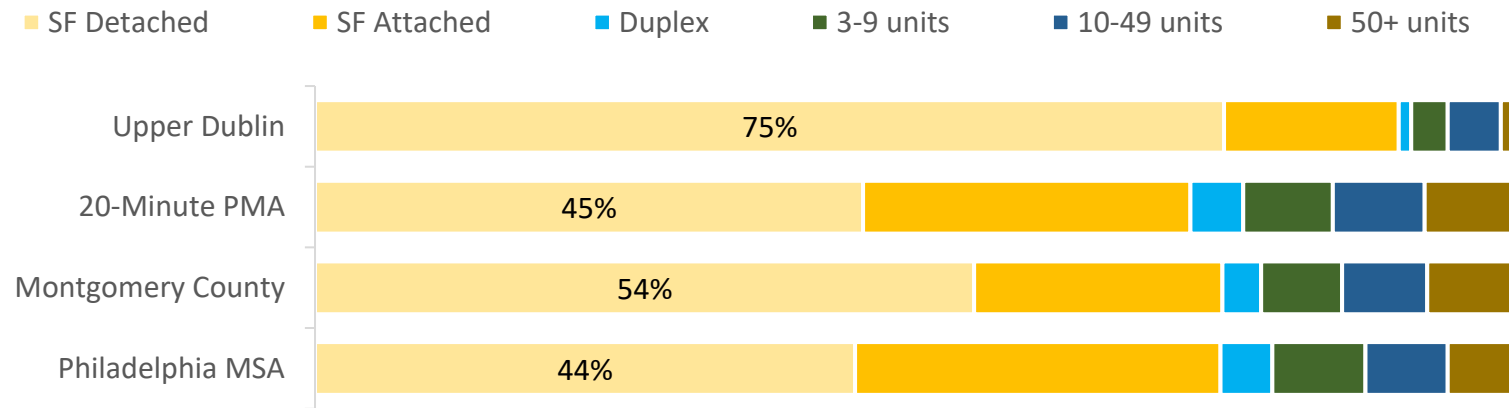
September 9, 2024

### Residential Real Estate



# RESIDENTIAL REAL ESTATE

## Housing by Structure Type - 2021

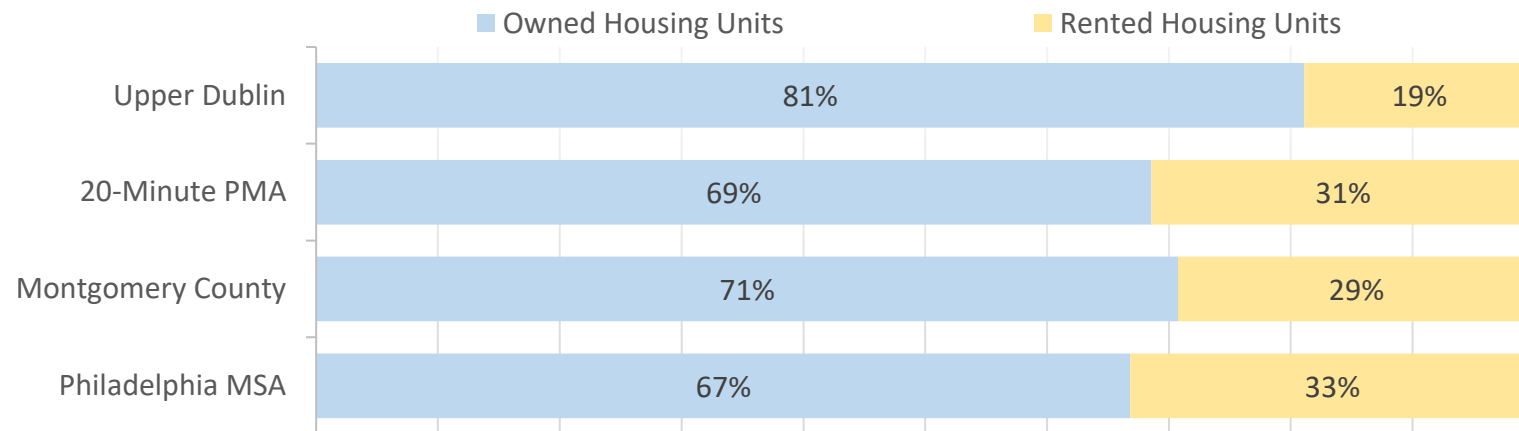


Source: Esri

**Nearly nine out of ten housing units in the township can be classified as single-family occupancy – a ratio far higher than anywhere else in the region.**

## RESIDENTIAL REAL ESTATE

### Housing Tenure - 2021



Source: Esri

The high share of owner-occupied housing units is reflective of the high share of single-family housing units. An increased share of renter-occupied units would benefit lower- and middle-income workers.



## RESIDENTIAL REAL ESTATE

### Housing Affordability Metrics

Metric (Year)	Upper Dublin Township	20-Minute PMA	Montgomery County	Philadelphia MSA
Median Home Value (2023)	\$481,854	\$390,187	\$424,053	\$345,262
Median Home Value/Median HH Income (2023)	3.1	4.1	3.9	4.1
Share of Cost Burdened Owner HHs (2021)	23%	27%	23%	27%
Median Gross Rent (2021)	\$1,728	\$1,316	\$1,393	\$1,230
Share of Cost Burdened Renter HHs (2021)	42%	46%	45%	49%

Source: Esri

Upper Dublin's housing market is relatively expensive when compared to the region. It is likely that housing affordability may be challenging some segments of the local workforce.

## RESIDENTIAL REAL ESTATE

### Estimated Unmet Housing Demand

	2023	2028
20-Minute PMA	13,286	14,072
3% Capture in UD	399	422
5% Capture in UD	664	704

Developing another 500 units (multi-family, principally) in Upper Dublin Township would represent less than a five-percent increase in the total number of existing housing units and could help provide more affordable housing options



# Upper Dublin Township

## COMPREHENSIVE PLAN MARKET STUDY

September 9, 2024



# Questions?

# Structure

## Upper Dublin Today

### EXISTING TRENDS, ASSETS, AND CHALLENGES

**How we got here, what we are today, and how our community assets and challenges provide direction for the future.** It is important to understand how the community evolved to its current state and the characteristics of today's Upper Dublin to establish a foundation for how to move forward. We know that trends impacting the Township today need to be considered in planning efforts.

## Upper Dublin Tomorrow

### VISION

**What Upper Dublin Township wants to be in ten years.** The vision provides direction for the plan's goals and paints a picture of the future if all the goals are accomplished.

### GUIDING PRINCIPLES

**The value system that guides the plan and future actions.** Principles that serve as the foundation for aligning decisions in Upper Dublin with shared community values and the future vision. The guiding principles apply to all focus areas and goals.

### FOCUS AREAS

**Community Priorities.** A framework to organize the plan's goals and actions based on priorities identified by community feedback. The focus areas demonstrate how elements of a comprehensive plan (e.g., housing, transportation, natural resources, etc.) are interrelated in accomplishing the Township's vision.

### GOALS

**What the plan is accomplishing.** Goals outline what the plan's actions will accomplish. These are the outcomes that the Township are striving to achieve to realize its vision for the future. The outcomes will have associated measurable milestones to track progress.

### ACTIONS

**How it is happening.** Actions are the implementable steps that will accomplish the goals. Actions have specific outputs, such as a policy, program, or project.

### IMPLEMENTATION

**The details.** The Implementation chapter includes detailed guidance for the plan's goals and actions, such as partners, funding sources, and time frame.

### FUTURE LAND USE

**Putting it on the map.** The Future Land Use section includes an annotated Future Land Use Map which will be used to guide future land use decision making. The future land use map reflects the goals and actions of the plan. This section also includes a fiscal analysis of five proposed mixed-use areas in the Township.

# UD Tomorrow Vision “Upper Dublin Connections”

*What Upper Dublin Township wants to be in ten years. The vision provides direction for the plan's goals and paints a picture of the future if all the goals are accomplished.*

Upper Dublin Township is a diverse and sustainable community that blends preservation of the cherished character of our neighborhoods with an embrace for positive change that responds to existing and future community needs. Upper Dublin recognizes and respects that land use, the environment, and residents' quality of life are interconnected. Connections are the forefront of planning initiatives; neighborhoods are well-connected physically with safe routes; the wider Upper Dublin community is connected through vibrant neighborhood and commercial spaces. Communities are engaged in environmental stewardship with the Township and wider region. Upper Dublin prioritizes actions that develop new connections between the Township, residents, community organizations, institutions, the business community, and more to champion a resilient and engaged community.

# UD Tomorrow Guiding Principles

*The value system that guides the plan and future actions. Principles that serve as the foundation for aligning decisions in Upper Dublin with shared community values and the future vision. The guiding principles apply to all focus areas and goals.*

## Promoting community for all.

Upper Dublin will...

- Acknowledge the conditions that economically/socially marginalized populations in the Township face and prioritize actions that adjust imbalances between those in Upper Dublin. Imbalances may be in access to housing, education, amenities and services and a sense of safety.
- Work with communities, especially those that have been historically economically/socially marginalized, to understand their needs and engage these communities in decision making processes.

## Centering environmental sustainability and resilience.

Upper Dublin will...

- Advance initiatives that protect neighborhoods from the impacts of climate change and make the Township more resilient in the face of natural disasters.
- Prioritize environmental protection and preservation in new development and redevelopment.
- Collaborate with residents and regional partners to advance initiatives that make Upper Dublin more environmentally sustainable.

## Facilitating coordinated development.

Upper Dublin will...

- Encourage redevelopment over developing existing open space and focus on sustainable and smart growth.
- Promote collaboration among residents to guide planning and development.
- Upgrade Township infrastructure to match needs of new developments.
- Make complementary land use decisions, such as using compact urban form to reduce carbon and protect open space.

# Accessible Neighborhoods



**AN Goal 1:** Create safe and accessible multi-modal connections.



**AN Goal 2:** Prioritize housing that meets the varying needs of all existing and future community members.

# **AN Goal 1: Create safe and accessible multi-modal connections.**

Action AN 1.A

**Improve safety conditions for all roadway users across the Township.**

Action AN 1.B

**Implement Community Connectivity goals & objectives from the Upper Dublin Open Space plan to fill gaps and resolve barriers in the pedestrian and bicycle network created by missing connections.**

Action AN 1.C

**Provide streetscaping and beautification improvements along key neighborhood corridors.**

Action AN 1.D

**Establish a community bike training and access program.**



# A Note on Implementation

## Accessible Neighborhoods Implementation Framework



### AN GOAL 1: Create safe and accessible multi-modal connections.

- OUTCOMES**
- Safer streets for all users.
  - Connections between neighborhoods.
  - Greater bike connectivity.
  - Greater accessibility.

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS
Infrastructure Upgrade	AN 1.A Improve safety conditions for all roadway users across the Township.	<ul style="list-style-type: none"> <li>• Roadway assessment.</li> <li>• Detailed site surveying.</li> <li>• Cost estimates.</li> <li>• Approval for funding and construction.</li> </ul>	<ul style="list-style-type: none"> <li>• UDT Engineer (Lead)</li> <li>• UDT Public Works</li> <li>• UDT Community Planning &amp; Zoning</li> </ul>	<ul style="list-style-type: none"> <li>• DVRPC Transportation and Community Development Initiative (TCDI)</li> <li>• Private developers</li> </ul>	Long	<ul style="list-style-type: none"> <li>• Roadway assessment findings.</li> <li>• Site designs.</li> <li>• Cost estimates.</li> <li>• Completed safety improvements.</li> </ul>
Infrastructure Upgrade	AN 1.B. Implement Community Connectivity goals and objectives from the Upper Dublin Open Space Plan to fill gaps and resolve barriers in the pedestrian and bicycle network created by missing connections.	<ul style="list-style-type: none"> <li>• Update Missing Connections map.</li> <li>• Detailed site surveying.</li> <li>• Cost estimates.</li> <li>• Approval for funding and construction.</li> </ul>	<ul style="list-style-type: none"> <li>• UDT Engineer (Lead)</li> <li>• UDT Parks &amp; Recreation</li> <li>• UDT Public Works</li> <li>• UDT Community Planning &amp; Zoning</li> </ul>	<ul style="list-style-type: none"> <li>• PennDOT and DVRPC Transportation Alternatives Set Aside (TASA)</li> <li>• DVRPC Competitive Congestion Mitigation and Air Quality Improvement Program (CMAQ)</li> <li>• Commonwealth Financing Agency (CFA) Multimodal Transportation Fund</li> <li>• PA Department of Health (DOH) WalkWorks</li> <li>• AARP Community Challenge Grant</li> <li>• Private developers</li> </ul>	Medium to Long	<ul style="list-style-type: none"> <li>• Updated Missing Connections map.</li> <li>• Site designs.</li> <li>• Cost estimates.</li> <li>• Built connections.</li> </ul>
Policy	AN 1.C Provide streetscaping and beautification improvements along key neighborhood corridors.	<ul style="list-style-type: none"> <li>• Develop design guidelines.</li> <li>• Approval from Board of Commissioners.</li> <li>• Incorporate guidelines into development review.</li> </ul>	<ul style="list-style-type: none"> <li>• UDT Engineer (Lead)</li> <li>• UDT Public Works</li> <li>• UDT Community Planning &amp; Zoning</li> <li>• UDT Planning Commission</li> </ul>	<ul style="list-style-type: none"> <li>• PA DOH WalkWorks</li> <li>• Commonwealth Financing Agency (CFA) Multimodal Transportation Fund</li> <li>• AARP Community Challenge Grant</li> </ul>	Medium to Long	<ul style="list-style-type: none"> <li>• Streetscaping design guidelines.</li> <li>• Adoption resolution.</li> </ul>
Program	AN 1.D Establish a bike training and access program.	<ul style="list-style-type: none"> <li>• Establish program task force.</li> <li>• Develop program report.</li> <li>• Coordinate with stakeholders for approval and funding.</li> <li>• Implement program.</li> </ul>	<ul style="list-style-type: none"> <li>• UDT Community Planning &amp; Zoning (Lead)</li> <li>• UDT Public Works</li> <li>• MCPC</li> <li>• DVRPC</li> <li>• GVF-TMA</li> </ul>	<ul style="list-style-type: none"> <li>• PA DOH WalkWorks</li> <li>• DVRPC CMAQ</li> <li>• Commonwealth Financing Agency (CFA) Multimodal Transportation Fund</li> <li>• AARP Community Challenge Grant</li> <li>• DVRPC TCDI</li> </ul>	Long	<ul style="list-style-type: none"> <li>• Bike training and access program report.</li> <li>• Established program.</li> <li>• Reduction in vehicle trips.</li> </ul>

# **AN Goal 2: Prioritize housing that meets the varying needs of all existing and future community members.**

Action AN 2.A  
**Adopt a zoning ordinance with form-based zoning principles.**

Action AN 2.B  
**Encourage residential development proposals that incorporate missing middle housing types and affordable options.**

Action AN 2.C  
**Connect residents to funding programs to support housing maintenance and repairs.**

Action AN 2.D  
**Maintain and protect existing Historic Resources.**

Action AN 2.E  
**Review and update permitting processes for residential renovations and repairs.**

Action AN 2.F  
**Provide education on permitting processes.**

# Vibrant & Connected Communities



CC Goal 1: Cultivate neighborhood hubs.



CC Goal 2: Invest in community-serving commercial and mixed-use districts.



CC Goal 3: Support and encourage local business.

# CC Goal 1: Cultivate neighborhoods hubs.

## Action CC 1.A

**Permit small, low-impact, neighborhood-serving retail uses in portions of residential districts along main corridors.**

## Action CC 1.B

**Develop a neighborhood placemaking grant to encourage and fund beautification, streetscaping, and community building in neighborhoods and around community amenities.**

## Action CC 1.C

**Invest in upgrades to North Hills Community Center and celebrate its historic and cultural significance.**

## Action CC 1.D

**Implement the Upper Dublin Open Space Plan's Open Space and Natural Resources Objective by prioritizing Properties of Interest for Township Parks and Recreation to expand access to parks.**

# CC Goal 2: Invest in community-serving commercial and mixed-use districts.

## Action CC 2.A

**Develop focused and phased improvement plans for neighborhood shopping centers.**

## Action CC 2.B

**Incorporate transit-oriented development along Pennsylvania Avenue to create a corridor with services and amenities for residents and commuters.**

## Action CC 2.C

**Develop a phased implementation approach to creating a mixed-use, walkable Greater Fort Washington District.**

## Action CC 2.D

**Implement a TDM ordinance to help manage traffic impacts of new development.**

# CC Goal 3: Support and encourage local business.

Action CC 3.A

**Identify barriers to home-based businesses in the existing zoning ordinance.**

Action CC 3.B

**Connect local businesses with existing Township institutions for recruitment and job training.**

# Adaptive & Resilient Environment



**RE Goal 1:** Build environmental sustainability and resiliency.



**RE Goal 2:** Increase community-wide participation in environmental stewardship.

# RE Goal 1: Build environmental sustainability and resiliency.

## Action RE 1.A

**Continue investing in the Township tree canopy to reduce risk to extreme heat.**

## Action RE 1.B

**Continue participation in the Wissahickon Clean Water Partnership and implement the Water Quality Improvement Plan.**

## Action RE 1.C

**Conduct and implement a stormwater study and evaluate stormwater management improvements.**

## Action RE 1.D

**Adopt an Official Map to proactively plan for the preservation of parks, recreation, and open spaces, missing connections improvements, and stormwater management improvements.**



# RE Goal 1: Build environmental sustainability and resiliency. (continued)

## Action RE 1.E

**Continue to review and update floodplain and stormwater management ordinances to reduce flood risk in the Township.**

## Action RE 1. F

**Implement recommendations identified in the Renewable Energy Transition Plan for Upper Dublin Township Municipal Operations.**

## Action RE 1.G

**Implement recommendations identified in the 2022 Montgomery County Hazard Mitigation Plan.**

## Action RE 1.H

**Pursue Gold Sustainable PA certification..**

# RE Goal 2: Increase community-wide participation in environmental stewardship

Action RE 2.A  
**Implement a Sustainable Property Program.**

Action RE 2.B  
**Establish a “Green Points” Green Building Incentive Program for property owners.**

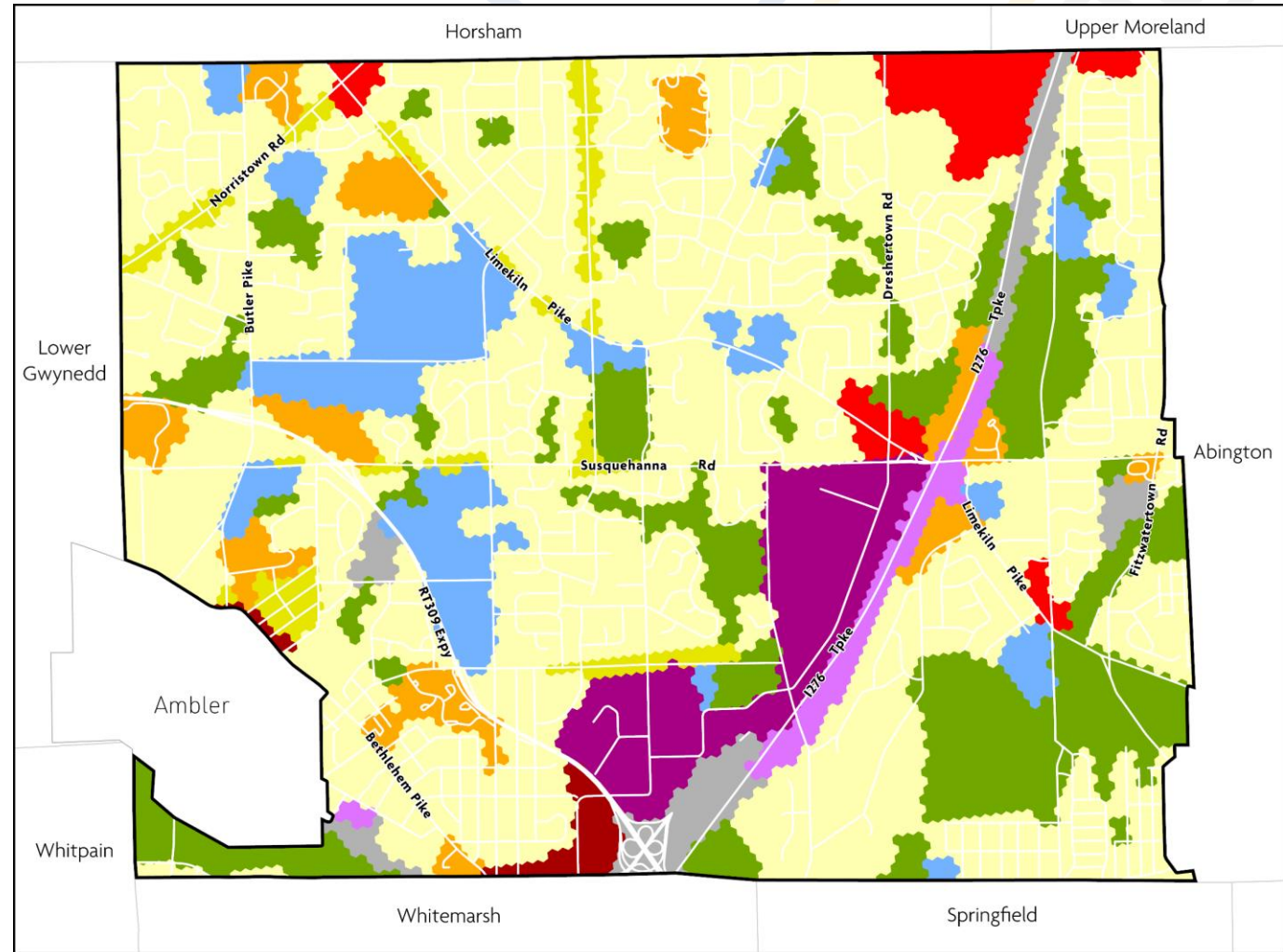
Action RE 2.C  
**Provide incentives for developments that meet or exceed a specific LEED or Energy Star rating.**

Action RE 2.D  
**Review Township ordinances to ensure they promote environmentally sustainable practices.**

Action RE 2.E  
**Position the Township as a champion of environmental stewardship that guides residents and businesses in energy sources and usage.**

# Future Land Use

Density/ Intensity	Special District Place Types	Residential Place Types	Mixed-Use Place Types
Low ↑ ↓ High	Open Space & Recreation	Residential Neighborhood	Township Center
	Community Institution	Residential Transition	Commercial Corridor
	Utilities & Public Works Facilities	Apartment & Townhouse Communities	Regional Activity Center
	Industrial		



- A reflection of the plan's vision, goals, and actions.
- Conceptual in nature.
- NOT a regulatory document
- NOT parcel specific

# Future Land Use

## Commercial Corridor

Commercial corridors provide for floor residential uses along major roads. They provide a buffer from busy corridors and surrounding residential neighborhoods. Commercial corridors provide residents and visitors with a variety of uses, including shopping, dining, and services. Commercial corridors are characterized by a mix of single-story buildings with adequate setbacks and sidewalk network. Commercial corridors can accommodate auto-oriented uses, provide access to the building, and support active uses at the rear of the building.

### Illustrative Examples of



## Regional Activity Center

The Regional Activity Center is the primary focal point of the Greater Fort Washington District. It is meant to be a walkable, sustainable, and vibrant place with a variety of uses. The variety of uses includes commercial, residential, institutional, and recreational. These spaces are meant to serve residents with a variety of needs, including private recreational, office, and institutional. These spaces are meant to create a "work-live-play" neighborhood as the wider Township and communities. This place type puts building form that encourages an active frontage (minimal setbacks, ground-level commercial, etc.). The vibrancy of the place is enhanced by streetscapes that accommodate pedestrians and bicyclists while providing circulation of vehicles towards the rear of the building. Landscaping and street furniture are situated at the rear of the building to support a cohesive area identity. Furthermore, the place is supported by a robust stormwater network of green infrastructure which provides infrastructure needs while contributing to the landscaping of the area.

### Illustrative Example of Place Type



## Open Space and Recreation

The open space and recreation place type is characterized by natural areas, green spaces with tree canopy, and active uses where appropriate. These spaces are meant to provide recreational opportunities (e.g., trails, etc.). Active uses are meant to minimize impacts.

### Illustrative



## Residential Neighborhood

Residential neighborhoods make up the majority of Upper Dublin. These are low-density neighborhoods with a variety of housing types at different price points to serve residents with a diversity of needs, ages, incomes, and lifestyles. Neighborhoods are characterized by low-rise residential buildings that can include single-family homes, duplexes, townhomes, and small apartment buildings. While the primary use is residential, neighborhoods often include open spaces and recreational resources and can be served by neighborhood-scale community institutions, such as day cares or churches. Commercial activities are limited in residential neighborhoods. They surround other places in the township, including institutional, commercial, and recreational places, and provide safe and accessible connections to these places.

### Illustrative Examples of Place Type



## Place Type Characteristics

### Place Type Characteristics

**Building Form:** Many of the individual neighborhoods have unifying characteristics, such as setbacks, building heights, that have been maintained as were originally developed. A common characteristic of Upper Dublin is each home having a front lawn and back yard. Typical buildings are single-family residential buildings up to 2 or 3 stories. Townhomes can have several units depending on size and location. The size of civic and institutional buildings varies based on context and accessibility. Development should be conscious of sensitive environmental resources and may be clustered to protect these resources.

**Land Uses:** Primarily residential, with a mix of uses within the surrounding area providing connections to goods and services. Housing includes small apartments, condominiums, townhouses, senior residences, single-family duplexes, accessory dwelling units and tiny homes. Other uses include neighborhood-scale community institutions, such as day cares or churches, and commercial activities within neighborhood-scale centers.

**Mobility:** Neighborhoods are characterized by connected local streets providing safe and access throughout and between neighborhoods and other places. The street network includes access points, helping disperse vehicular traffic and allowing residents to safely walk or bike to destinations. Off-road connections are provided between neighborhoods for bike and pedestrian access. All of these connections allow safe access to nearby parks and services.

**Open Spaces:** Residential neighborhoods include a variety of open spaces and natural resources including parks, community gardens, and green spaces are found throughout neighborhoods, especially along sidewalks. Neighborhoods may encompass neighborhood parks or may have access to community or regionally used parks. Private yards and improved common areas are also typical green spaces throughout neighborhoods.

## Township Center

Township centers provide a pedestrian-friendly focal point of neighborhood activity where nearby residents can access daily shopping needs and services within a five-to-ten-minute walk or a short drive. These places will accommodate a mix of uses, incorporating residential options within community shopping centers. Township centers are characterized by low-rise commercial, residential, civic/institutional, and mixed-use buildings in a pedestrian-oriented environment. These will be small, walkable mixed-use areas that provide convenient access to goods, services, dining, and recreational resources. Low-density residential buildings can be incorporated into shopping centers to connect people directly to these resources. In Upper Dublin, this could be achieved in the Maple Glen, Fairway, Upper Dublin, and Dreshertown shopping centers.

### Illustrative Examples of Place Type



Photo Credit: Congress for New Urbanism

## Place Type Characteristics

**Building Form:** These areas often have a typical suburban strip-mall design now but should transition to more walkable building placement and design, with infill development of more buildings and structured parking where feasible. Township centers are characterized by low-rise buildings with some limited mid-rise buildings in some areas. Buildings are designed with active ground floor uses to support a vibrant pedestrian environment.

**Land Uses:** Uses can include retail, restaurants, pharmacies, banks, offices, community centers, institutional, and multi-family residential options.

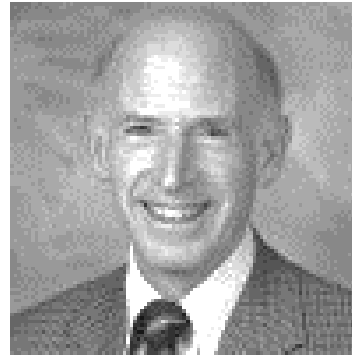
**Mobility:** Currently, these areas are often designed around cars, but should transition to improve accessible connections for pedestrians and cyclists. Township centers will be easily and directly accessible from nearby neighborhoods with safe pedestrian facilities leading to and within the sites.

**Open Spaces:** Walkable connections to nearby recreation and open space resources are essential. Township Centers should include improved open spaces such as plazas, patios, and courtyards that may include landscaping. They should also preserve existing trees and environmental features and plant additional trees and vegetation where possible.

# What is Fiscal Impact Analysis and Why Perform the Analysis?

“Planning is bringing the future into the present so that you can do something about it now”

- *Alan Lakein*



# Fiscal Impact Methodology

# Population Multiplier Tables

## Total Residents

BR Count	Single-family Detached	Single-family Attached	Multi-family Condo	Multi-family Rental
Studio	NA	NA	1.00	1.00
1-BR	NA	NA	1.09	1.09
2-BR	NA	1.72	2.19	2.19
3-BR	2.97	2.67	3.09	3.09
4-BR	3.62	3.64	NA	NA

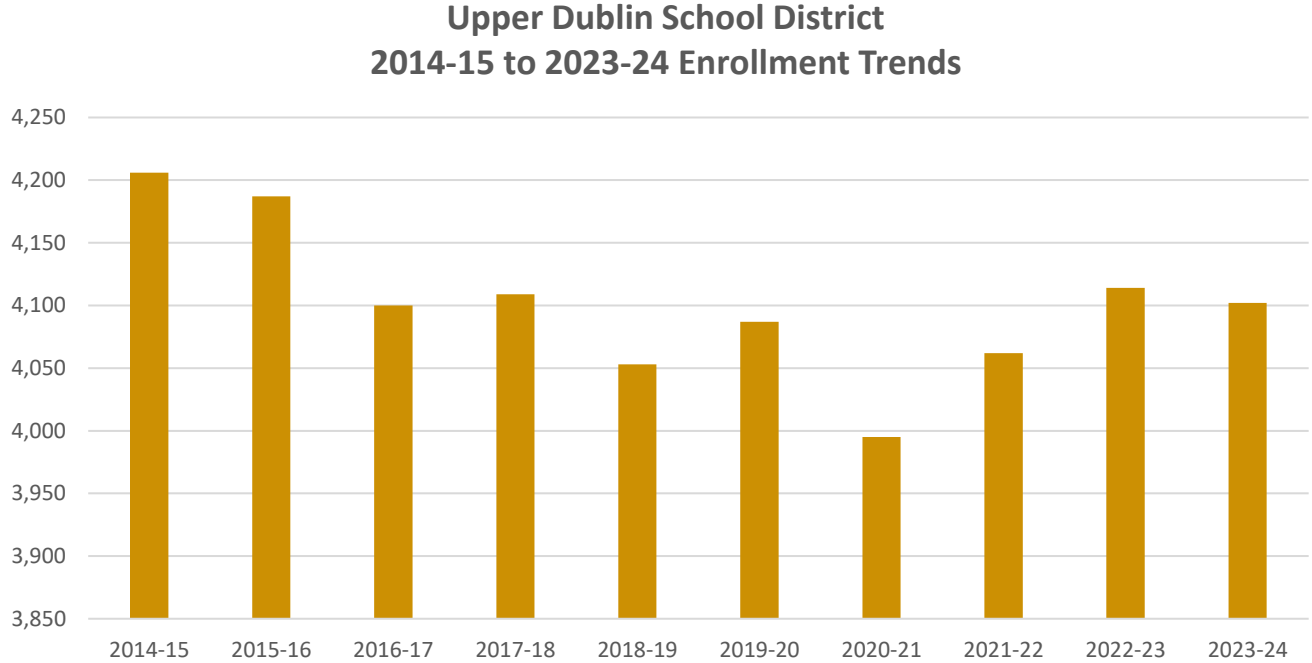
**Example:** For every 100 three-bedroom townhouse units, 267 total persons are anticipated

## Public School-Age Children

BR Count	Single-family Detached	Single-family Attached	Multi-family Condo	Multi-family Rental
Studio	NA	NA	0.00	0.00
1-BR	NA	NA	0.00	0.00
2-BR	NA	0.02	0.17	0.18
3-BR	0.45	0.49	0.74	0.80
4-BR	0.75	0.94	NA	NA

**Example:** For every 100 three-bedroom townhouse units, 49 public school-children are anticipated.

# UDSD Enrollment Trends



Source: Pennsylvania Department of Education, 2024





# Budget Adjustment – Methodology

## The Per Capita Multiplier Method

2024 Residential Parcels:	7,614	2024 Residential Assessed Value:	\$1,628,958,758
2024 Commercial & Industrial Parcels:	2,162	2024 Commercial & Industrial Assessed Value:	\$ 680,604,211
2024 All Other Parcels	<u>743</u>	2024 All Other Real Property Value:	<u>\$ 304,064,850</u>
<b>Total:</b>	<b>10,519</b>	<b>Total:</b>	<b>\$2,613,627,819</b>
Residential Percentage: 72.4%		Residential Percentage: 62.3%	



# Budget Adjustments – Twp. and UDSD

<b>2024 Total Approved Expenditures</b>	\$60,528,868 <sup>1</sup>
<i>Less Salaries/Wages</i>	15,069,102
<i>Less Fringe Benefits</i>	5,066,899
<i>Less Capital</i>	29,541,971
<i>Less Debt Service</i>	3,195,221
<b>Total Adjusted Budget:</b>	\$7,655,675

**Estimated 2024 Population**      27,205<sup>2</sup>

<b>Estimated Service Cost per Person</b>	\$281.41
67.4% represents new residential cost	\$189.67
32.6% represents new worker cost	\$91.74

<b>2023-24 Total Approved Expenditures</b>	\$118,005,660 <sup>3</sup>
<i>Less Salaries/Wages</i>	52,432,202
<i>Less Fringe Benefits</i>	31,218,228
<i>Less Transfers &amp; Reserves</i>	3,700,000
<i>Less Debt Service</i>	14,363,135
<b>Total Adjusted Budget:</b>	\$16,292,095

**2024 Student Enrollment**      4,102<sup>4</sup>

**Estimated Service Cost per New Student**      \$3,971.74

Based on the above metrics, each new resident associated with new development has an annual municipal service cost of \$189.67, while each new worker hired results in an annual municipal service cost of \$91.74. Each newly enrolled public-school student has a school district service cost of \$3,971.74. However, students having special needs (e.g., requiring an in-class aide, additional materials or capital improvements) would represent a greater annual cost to the district and would result in annual cost significantly greater.

<sup>1</sup> Upper Dublin Township 2024 Adopted Budget

<sup>2</sup> Estimated based on U.S. Census Bureau 2023 estimate

<sup>3</sup> Upper Dublin School District 2023-24 Adopted Budget

<sup>4</sup> Pennsylvania Department of Education, 2024



# Fiscal Impact Scenario

## Large Scale Mixed-Use Project

# Large Scale Mixed-Use Scenario

## Overview

- Eight to Twelve Acre Site
- Three to Four Story Multi-Family Development
- Ground Floor Retail
- Residential Density at 25 to 36 Units per Acre
- Parking requirements for residential and commercial uses are to be consistent with existing parking requirements for such land-uses.

# Large Scale Mixed-Use Scenario

## Residential Land-Uses

<u>Market</u>	<u>Units</u>	<u>Pct.</u>	<u>S.F.</u>	<u>Monthly Rent Rate</u>	<u>Rent Rate per S.F.</u>
Studios	60	20%	575	\$1,600	\$2.78
1BR	100	33%	825	\$1,950	\$2.36
2BR	140	47%	1,190	\$2,500	\$2.10
3BR	<u>0</u>		<u>1,240</u>	<u>\$2,850</u>	<u>\$2.30</u>
Total	300		283,600		
Weighted Avg.			945	\$2,137	\$2.32

# Large Scale Mixed-Use Scenario

## Commercial Land-Uses

<u>Retail Type</u>	<u>S.F.</u>	<u>Annua Lease Rate/S.F.</u>	<u>Total Annual Lease Payment</u>
Anchor Grocer	50,000	\$20	\$100,000
General Retail Space	16,000	\$25	\$400,000
Dining/Cafe Spaces	10,000	\$30	\$300,000
Personal Service Space	<u>6,000</u>	<u>\$25</u>	<u>\$150,000</u>
Total	82,000		\$950,000



# Large Scale Mixed-Use Scenario

New Residents and Workers



413 Residents



48 Public School Children



184 Full- and Part-Time Employees

# Large Scale Mixed-Use Scenario

## Projected First Year Stabilized Revenues

\$ 406,227	==	Twp. Property Tax Revenues	} Total First Year Stabilized Revenue \$ 529,679
\$ 1,641	==	Twp. LST Revenues	
\$ 121,811	==	Twp. EIT Revenues	
\$2,490,654	==	UDSD Property Tax Revenues	} Total First Year Stabilized Revenue \$2,627,888
\$ 15,424	==	UDSD LST Revenues	
\$ 121,811	==	UDSD EIT Revenues	





# Large Scale Redevelopment Scenario

## Projected Increase in Township and School Personnel



**0 Police Officers**



**0 DPW Employees**



**0 UDSD Employees**

**Note:** The above personnel and associated labor cost estimates are based on broad assumptions by 4ward Planning and are subject to further evaluation by township and school district officials.

# Large Scale Mixed-Use Scenario

## Projected First Year Stabilized Service Costs

**\$ 95,373 = Twp. First Year Service Cost**

**\$154,360 = UDSD First Year Service Cost**

The above service costs are associated with the full build-out in the first stabilized year (in other words, when the buildings reach their long-term occupancy rates of 95- and 90-percent for residential and commercial, respectively). The township's and school district's annual service costs accounts for new personnel, if any, identified on the previous page and are estimates. No capital costs (e.g., purchase of new vehicles or equipment, or construction of new buildings is accounted for in the above cost values).

# Large Scale Mixed-Use Scenario

## Projected Net Fiscal Impact for First Stabilized Year

\$ 529,679

Twp. First Year Projected Revenue

\$ 95,373

Twp. First Year Projected Service Cost

\$ 434,305

Positive Net Fiscal Impact

\$2,627,888

UDSD First Year Projected Revenue

\$ 154,360

UDSD First Year Projected Service Cost

\$2,473,528

Positive Net Fiscal Impact

# Fiscal Impact Scenario

## Large Scale Multi-Family Project

# Large Scale Multi-Family Scenario

## Overview

This scenario assumes redevelopment on land area ranging from eight to twelve-acres, featuring multi-family residential unit development scaled at three to four stories. This scenario is a suitable redevelopment project for an underutilized land parcel.

Residential density would be a minimum of 25 units per acre and as high as 36 units per acre.

Parking requirements for residential and commercial uses are to be consistent with existing parking requirements for such land-uses.

# Large Scale Multi-Family Scenario

## Overview

- Eight to Twelve Acre Site
- Three to Four Story Multi-Family Development
- Residential Density at 25 to 36 Units per Acre
- Parking requirements for residential and commercial uses are to be consistent with existing parking requirements for such land-uses.

# Large Scale Mixed-Use Scenario

## Residential Land-Uses

<u>Market</u>	<u>Units</u>	<u>Pct.</u>	<u>S.F.</u>	<u>Monthly Rent Rate</u>	<u>Rent Rate per S.F.</u>
Studios	80	20%	575	\$1,600	\$2.78
1BR	80	20%	825	\$1,950	\$2.36
2BR	200	50%	1,190	\$2,500	\$2.10
3BR	<u>40</u>	<u>10%</u>	<u>1,240</u>	<u>\$2,850</u>	<u>\$2.30</u>
Total	400		399,600		
Weighted Avg.			999	\$2,245	\$2.31



# Large Scale Multi-Family Scenario

New Residents



**616 Residents**



**98 Public School Children**



# Large Scale Multi-Family Scenario

## Projected First Year Stabilized Revenues

\$ 534,866	==	Twp. Property Tax Revenues	} Total First Year Stabilized Revenue
\$ 2,331	==	Twp. LST Revenues	
\$ 170,622	==	Twp. EIT Revenues	
\$3,279,365	==	UDSD Property Tax Revenues	} Total First Year Stabilized Revenue
\$ 21,913	==	UDSD LST Revenues	
\$ 170,622	==	UDSD EIT Revenues	



# Large Scale Multi-Family Scenario

## Projected Increase in Township and School Personnel



**0 Police Officers**



**0 DPW Employees**



**6 UDSD Employees**

**Note:** The above personnel and associated labor cost estimates are based on broad assumptions by 4ward Planning and are subject to further evaluation by township and school district officials.

# Large Scale Multi-Family Scenario

## Projected First Year Stabilized Service Costs

**\$117,040** = **Twp. First Year Service Cost**

**\$795,153** = **UDSD First Year Service Cost**

The above service costs are associated with the full build-out in the first stabilized year (in other words, when the building reaches its long-term occupancy rate of 95- percent. The township's and school district's annual service costs accounts for new personnel, if any, identified on the previous page and are estimates. No capital costs (e.g., purchase of new vehicles or equipment, or construction of new buildings is accounted for in the above cost values).

# Large Scale Multi-Family Scenario

## Projected Net Fiscal Impact for First Stabilized Year

\$ 707,819

Twp. First Year Projected Revenue

\$ 117,040

Twp. First Year Projected Service Cost

\$ 590,779

Positive Net Fiscal Impact

\$3,471,900

UDSD First Year Projected Revenue

\$ 795,153

UDSD First Year Projected Service Cost

\$2,676,747

Positive Net Fiscal Impact

Questions?



# Next Steps

