



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

FINAL DRAFT PLAN

Version: November 26, 2024



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Resident and Stakeholders

The over 1,100 residents and stakeholders who participated in the UD Plan process by participating in a focus group, taking the community survey, visiting a pop-up event, or attending an open house.

UD Plan Steering Committee

Sherie Couser, Member-at-Large
Mary Cunnane, Member-at-Large
Austin Faberman, Environmental Protection
Advisory Board
Alyson Fritzges, Board of Commissioners
Marsha Garcia, Member-at-Large
Eric Jarrell and Claire Warner, Montgomery
County Planning Commission
Mike Lee, Member-at-Large
Vicki Lewis McGarvey and Kevin Orangers,
Temple Ambler
Alexis Musgrove, Member-at-Large
Henry Nalence, Member-at-Large
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Steve Stone, Shade Tree Commission
Andrew Svekla, Delaware Valley Regional
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John Toner, Member-at-Large
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Connect the Dots

Photos

All photographs were taken by the consultant team unless otherwise noted.

INTRODUCTION

Purpose

UD Plan serves as an official policy guide for short-, medium-, and long-term decision-making related to placemaking, land use, growth, and development over the next 10 years. It is a tool for Township decision makers and residents alike that answers the question: “How can we collectively work to accomplish this plan’s vision for a connected, sustainable, and equitable community?”

Upper Dublin Township’s most recent Comprehensive Plan was completed in 2010. UD Plan, the Upper Dublin Township Comprehensive Plan update, proactively plans for and responds to changing trends and community needs that have shaped the Township since 2010. UD Plan examines the priorities of the Township from 2010 and updates them by:

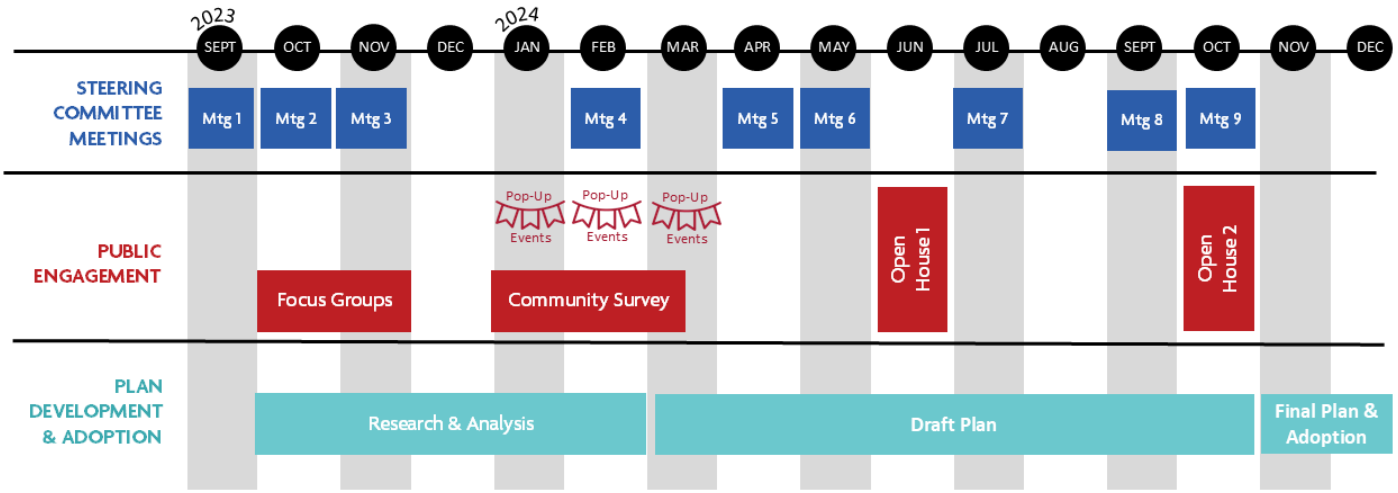
- **Considering trends and needs that have changed since 2010.** COVID-19 changed how and where we work, resulting in changing commuting patterns and reducing demand for office space. Socioeconomically, household size is decreasing, the population is aging, and the Township’s households’ median incomes are increasing. Environmentally, Upper Dublin knows the impacts of climate change firsthand, felt through more frequent and severe weather events. UD Plan considers all of these trends and more in charting a map for the next ten years.
- **Incorporating the pulse of the community.** Many residents called Upper Dublin home in 2010; however, there are new households, and the needs of residents may have changed over the last decade and a half. We gathered input and learned about the priorities of residents through a community-wide survey and pop-up engagement events. This feedback was used to develop the overall vision for this plan.
- **Focusing on implementation.** An implementable comprehensive plan focuses on top community priorities and provides practical and workable recommendations to address them. It also acknowledges that planning elements are all interrelated. As such, UD Plan is organized into three focus areas that require actions relating to multiple planning elements to accomplish their goals. Each action is accompanied by a user-friendly implementation framework.

Process

Overview

Development of UD Plan was a collaborative effort, which will enable success in implementing the plan and accomplishing the vision for the Township. The process was guided by a Steering Committee and feedback from residents and stakeholders. Opportunities for offering comments, input, ideas, concerns, and solutions were provided throughout the process through a variety of methods. Beyond listening to the input of the community, we needed to understand where Upper Dublin Township stands today to create the vision for where we want to go. To do this, we explored trends and data on land use, demographic and socioeconomic characteristics, housing, economic development, transportation, historic preservation, and the environment. We married community input with our research to create UD Plan.

Figure 1: Plan Process



Steering Committee

A Steering Committee was convened to help guide the planning process. The Steering Committee consisted of 16 residents. Included in the group were representatives from the Environmental Protection Advisory Board, Planning Commission, Shade Tree Commission, Historical Commission, and Board of Commissioners. The remaining members were at-large members who represented different geographies and demographics within the Township. The Steering Committee, and the varying perspectives they brought to the table, was crucial in guiding the project team in understanding the local context, developing public engagement activities and outreach, and drafting the plan’s recommendations.

Community Engagement

Throughout the planning process, extensive public outreach and engagement was conducted. The results from these efforts helped to paint a clear picture of existing challenges and assets, and illustrated where the community wants to go in the future. The goal of the community engagement was to provide all residents, business owners, and stakeholders the opportunity to understand and participate in crafting UD Plan. Community engagement programming included focus groups, a community survey, pop-up events, and open houses.

Focus Groups

Six focus groups were held in Fall 2023 to start to understand challenges, assets, and priorities from different community perspectives, inform the survey, and build plan buy-in. The six focus groups were Business and Major Employers, Environment and Sustainability, Housing and Development, Cross Generational, the Asian American Community, and the North Hills Community. While each groups has responses based on their unique perspectives, there were overlapping themes that emerged regarding building community partnerships, diversifying housing stock and the tax base, improving multi-modal transportation, and promoting environmental sustainability. Feedback from the focus groups helped inform the community survey content. Additionally, key stakeholder interviews were held with community members to

supplement feedback from the focus groups. A summary of focus group key findings can be found in Appendix D.

Community Survey & Pop-Up Events

A community survey was launched in January 2024 and open through mid-March 2024 to collect feedback from community members on assets, challenges, and plan priorities. In tandem, six visioning pop-up events were held throughout the Township at community events to encourage people to take the survey and collect additional feedback about a vision for the future of Upper Dublin. Findings from the survey and visioning pop-up events are included in Appendix D.

Community Open House – Focus Areas

A community open house was held in June 2024 to share information about the plan and solicit additional feedback. Information was shared on the planning process to date, upcoming steps, and how findings from the community engagement and research shaped the plan’s proposed vision, guiding principles, and goals. While community engagement, through the focus groups, interviews, surveys, and pop-ups, established the foundation for the plan, the open house was an opportunity to provide feedback to refine established community priorities. Feedback was then incorporated into the goals’ actions.

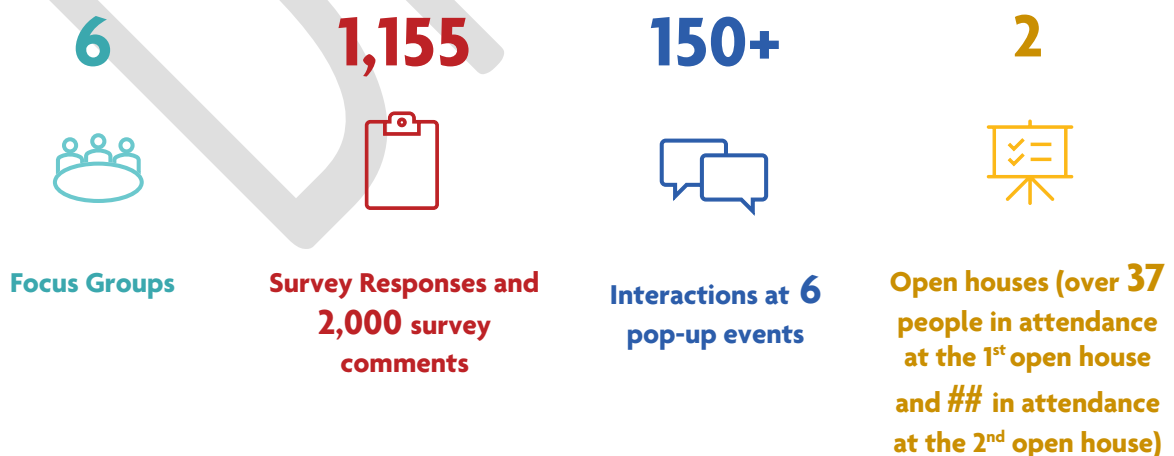
Community Open House – Draft Plan

A second community open house will be held in Fall 2024 to provide community members an opportunity to review the draft plan and provide comment prior to the project team and Steering Committee finalizing the final draft for Planning Commission and Board of Commissioner review.

Adoption

UD Plan will be adopted according to the Pennsylvania Municipalities Planning Code (MPC), including a public meeting at a Planning Commission meeting, a 45-day public comment period during which the school district, surrounding municipalities, and Montgomery County are notified, and a public hearing at a Board of Commissioners’ meeting.

Figure 2: Community Engagement in Numbers






Consistency with Montco2040

The MPC requires consistency between municipal comprehensive plans and county comprehensive plans, therefore UD Plan is required to be consistent with Montco 2040: A Shared Vision, the Montgomery County Comprehensive Plan. The goals and actions of UD Plan are consistent with goals within the three themes of Montco 2040: Connected Communities, Sustainable Places, and Vibrant Economy. Consistency with specific Montco 2040 goals is noted at the beginning of each focus area chapter. Additionally, the future land use map is consistent with 2040 Vision, the Montco 2040 future land use map and transportation vision.

Consistency with the Municipalities Planning Code

The MPC empowers municipalities in the Commonwealth to develop comprehensive plans to guide land use and plan for community facilities and utilities, historic preservation, natural resources protection, transportation, housing, and economic development. Comprehensive plans must meet the requirements of Article III, Section 301 of the MPC. Appendix B summarizes the MPC requirements in Article III, Section 301 and identifies where the requirements are addressed in UD Plan. Figure 3 summarizes how the focus areas, goals, and MPC requirements align.

Figure 3: Focus Areas and Goals Consistency with MPC

Focus Area	Goal	MPC Element
Accessible Neighborhoods 	Create safe and accessible multi-modal connections.	<ul style="list-style-type: none"> • Movement of people and goods • Land use • Facilities and utilities
	Prioritize housing that meets the varying needs of all existing and future community members.	<ul style="list-style-type: none"> • Housing • Historic resources • Land use
Vibrant and Connected Community Spaces 	Cultivate neighborhood hubs.	<ul style="list-style-type: none"> • Movement of people and goods • Historic resources • Land use • Facilities and utilities • Natural resources
	Invest in community-serving commercial and mixed-use districts.	<ul style="list-style-type: none"> • Movement of people and goods • Land use • Facilities and utilities
	Support and encourage local businesses.	<ul style="list-style-type: none"> • Land use
Adaptive and Resilient Environment 	Build environmental sustainability and resiliency.	<ul style="list-style-type: none"> • Land use • Facilities and utilities • Reliable water supply • Natural resources
	Increase community-wide participation in environmental stewardship.	<ul style="list-style-type: none"> • Housing and land use • Natural resources

Navigating UD Plan

The plan is divided into two sections: Upper Dublin Today and Upper Dublin Tomorrow. Understanding the assets, challenges, and trends facing Upper Dublin today establishes a foundation for planning for the future: What assets can be leveraged? What challenges need to be addressed? What trends will impact the community moving forward? How can these factors be harnessed for positive outcomes? How can potential negative impacts of these factors be reduced? Upper Dublin Tomorrow focuses the attention on the future – the next decade. The vision and guiding principles, inspired by community feedback received through the community-wide survey, engagement events, and focus groups, set the overarching tone for the plan. Three focus areas, each with goals and actions, work in tandem with a future land use map to address top community priorities and the vision of the plan. Each focus area addresses multiple planning elements in an integrated manner. Finally, an implementation chapter provides details on next steps for decision-makers, staff, and the wider community for working towards UD Plan’s goals.

Figure 4: Structure of UD Plan

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 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.

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 proposed mixed-use areas in the Township.

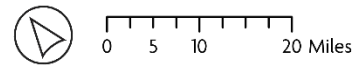
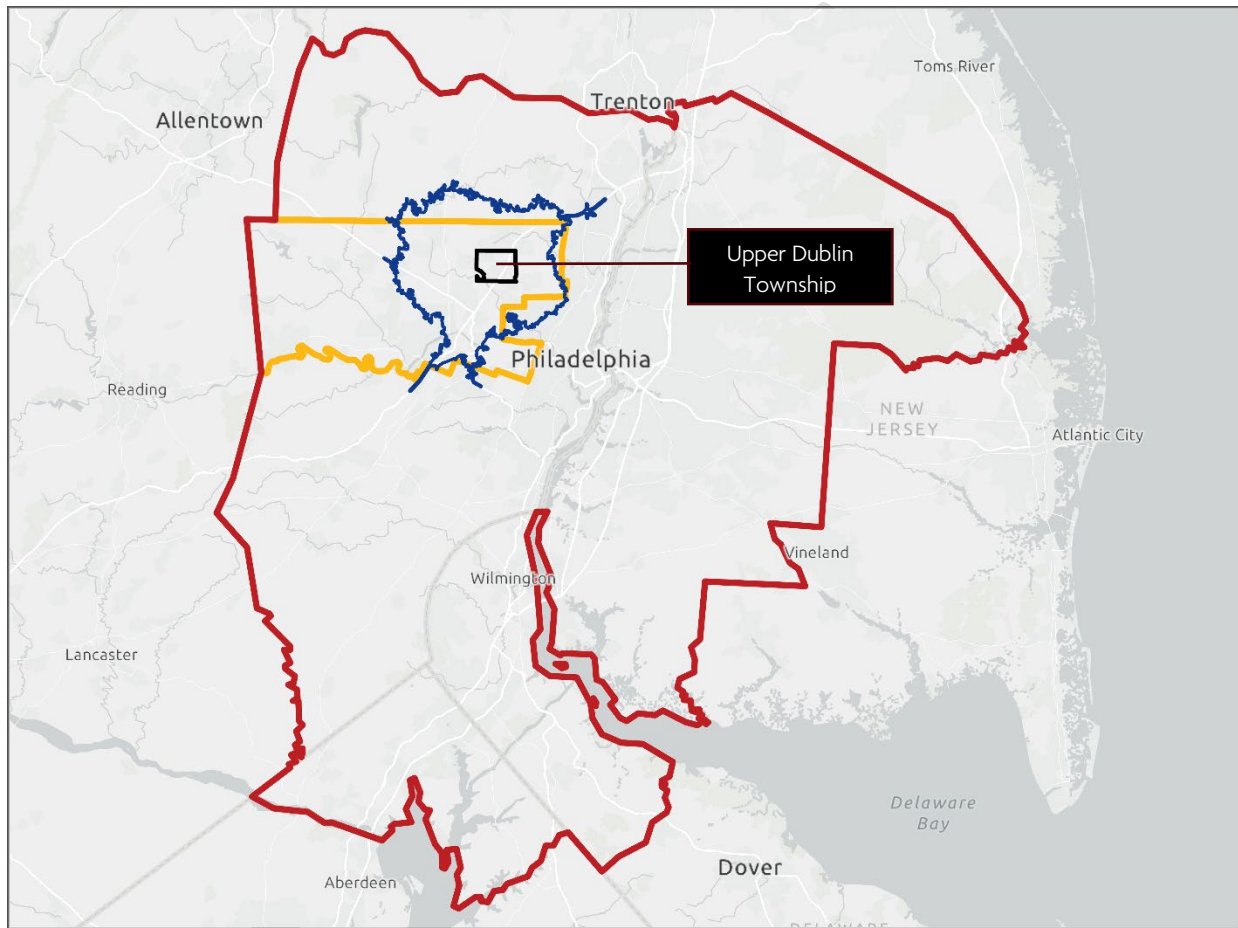
IMPLEMENTATION

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

UPPER DUBLIN TODAY

Located in Montgomery County, Pennsylvania, Upper Dublin Township (referred to as UDT, UD, or Upper Dublin) is a 13 square miles (8,320 acres) historic farming community that was established in the late 17th century and remained primarily agricultural and industrial (limestone mining) in character until the 20th century. The Township was granted First Class Township status in the Commonwealth of Pennsylvania in 1946. Following World War II, the Township boomed as a residential suburb within the Philadelphia metropolitan area.

Figure 5: Regional Context Location Map



Note: The 20-Minute Primary Market Area (PMA) represents the catchment area from which 70% or more of consumer patronage originates. For analysis purposes, it is defined as the 20-minute drive-time contour from Dreshertown Plaza, the Township's largest neighborhood shopping center. The Philadelphia MSA (Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area) includes 11 counties in New Jersey, Pennsylvania, Delaware, and Maryland.

Today, Upper Dublin is a mature suburb; 96% of its land is developed or protected as open space. Since the early 2000s, when the Township reached full build-out capacity, the focus has been on maintaining and reinvesting in community assets. Since 2021, the Township has an added layer of focus on rebuilding after a tornado associated with Hurricane Ida left a path of structural and environmental destruction through the Township.

While the maintenance of existing assets will be important as the Township looks towards the next decade, there are also many great opportunities to proactively respond to the population, lifestyle, and economic trends facing the Township. This section summarizes the existing assets that should be leveraged in planning for the future and the challenges that if harnessed properly can be turned into opportunities.

**Upper Dublin has many
assets**

that make it a great place to live and contribute to its stability. UD Plan recognizes these factors and aims to maintain and enhance them.

**Upper Dublin is faced with
challenges**

that if not addressed may erode quality of life and assets in the Township. UD Plan harnesses these challenges and turns them into opportunities through careful planning.

Upper Dublin has a collection of treasured amenities and institutions that are anchors in the community.

Location, location, location: Upper Dublin is conveniently located for easy access to Philadelphia and nearby regional centers via automobile or train.

Upper Dublin is a community of choice for stable households in the region.

With 628 acres in 2023, Upper Dublin is ranked #2 in municipal-owned parks and open space by total acres among the 62 townships and boroughs in Montgomery County.

There is limited developable land, as 96% of the Township is developed or protected as open space.

Upper Dublin has an aging population.

The Fort Washington Office Park has an office vacancy rate of 14% and is part of an office submarket with the highest office vacancy in the suburban Philadelphia market.

This chapter elaborates on these assets and challenges that shape UD Plan. For additional information on Upper Dublin Today, see the Planning Elements Profile in Appendix C.

Assets

Upper Dublin has a collection of treasured amenities and institutions that are anchors in the community.

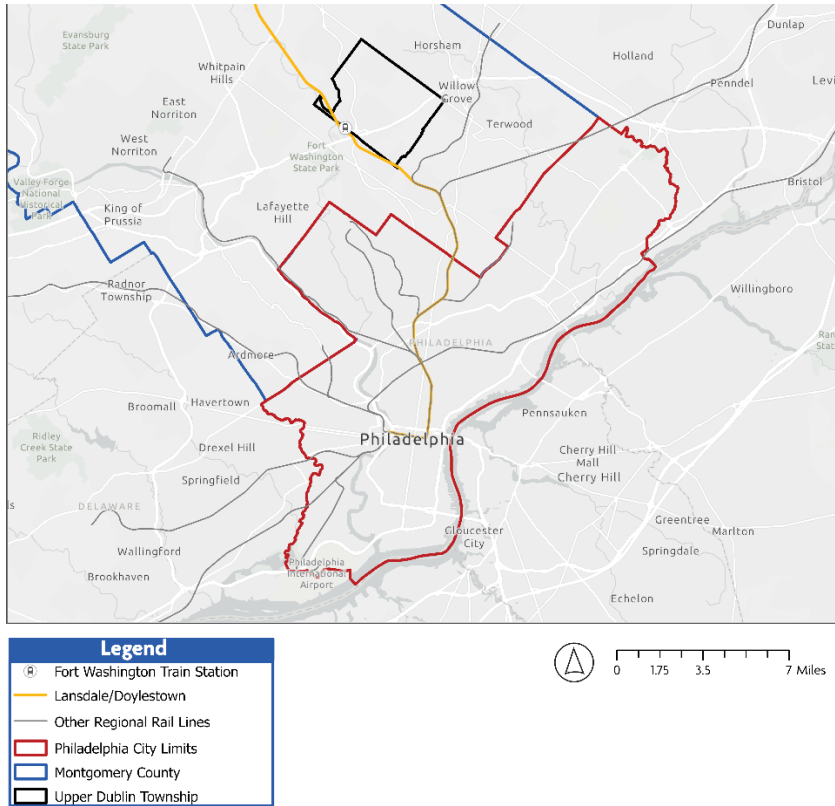
Upper Dublin offers recreational and educational amenities to residents within proximity to their own backyards including parks and recreation areas, the highly-ranked UD School District, Temple University – Ambler Campus (Temple-Ambler), and the UD Library.



Photo Credit: Upper Dublin School District, Upper Dublin Library, Upper Dublin Parks & Recreation, Temple-Ambler

Location, location, location: Upper Dublin is conveniently located for easy access to Philadelphia and nearby regional centers via automobile or train.

Figure 6: Location Map




Upper Dublin is in a prime location. Located along the I-276 section of the PA Turnpike, there is easy access to the nearby regional shopping center in King-of-Prussia to the west, New Jersey to the east, and I-476 that runs north to the Lehigh Valley and south through Delaware County. Center City Philadelphia is less than 25 miles away with convenient access via the SEPTA Lansdale/Doylestown Line which stops at the Fort Washington SEPTA train station. Its location makes Upper Dublin a great place to live because of easy access to the region’s amenities and population centers.

Upper Dublin is a community of choice for stable households in the region.

Upper Dublin’s population is highly educated with higher median incomes than the surrounding region. Educational attainment and income levels are relatively high in the Township. The median household income in the Township (\$155,407) is also significantly higher than that in the Metropolitan Service Area (MSA) (\$83,525). People with higher incomes tend to have higher disposable incomes and the ability to spend more on non-essential items, which can help support local businesses.

70%
of the Township’s adult population (25 years and older) have a bachelor’s degree or higher compared to 43% in the MSA.



Median household income in Upper Dublin is
86% higher
than the MSA.



With 628 acres in 2023, Upper Dublin is ranked #2 among the 62 townships and boroughs in Montgomery County in terms of the total acreage of municipal-owned parks and total open space.

These parks and open spaces provide numerous ecosystem services to the community:

Regulating Services	Cultural Services	Supporting Services
<p>Parks and open spaces help to regulate the environment through air and water purification, pollution reduction, stormwater and erosion control, and climate regulation.</p>	<p>Parks and open spaces provide recreational and local tourism opportunities and venues for the community to gather. Recreational opportunities help support physical and mental wellbeing.</p>	<p>Parks and open spaces support biodiversity by providing habitats for flora and fauna.</p>

Additionally, Montgomery County’s Return on Environment Report¹ details the economic benefits of protected open space including:

- **Home and Property Values:** Increased value of housing stock and an increase in annual additional property tax revenues from properties within half a mile from protected open space.
- **Economic Activity:** Economic impact through increased economic activity and job creation.
- **Environmental Services:** Savings of carbon storage in trees, avoided annual stormwater system maintenance costs, avoided annual stormwater pollutant removal costs, and savings from environmental services provisions (water supply, water quality, flood mitigation, wildlife habitat, air pollutant removal, and carbon sequestration).
- **Direct Use Benefits:** Recreational benefits, and reduction in medical costs and lost labor productivity costs.

Challenges

There is limited developable land as 96% of the Township is developed or protected as open space.

96% of the land in the Township is already developed or protected as open space. Typically, new development helps to grow the Township’s tax base which in turn helps support increased revenue for Township infrastructure and services, supports a reduced tax burden on individual property owners, and

¹ [Montgomery County Planning Commission. \(2022\) Return on Environment: The Economic Impact of Protected Open Space in Montgomery County, Pennsylvania.](#)

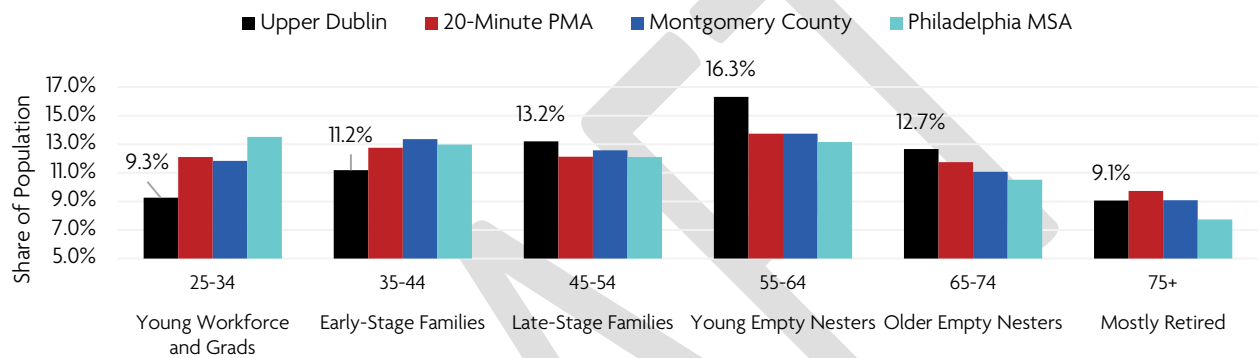
helps ensure the long-term fiscal stability of the Township. Limited vacant, developable land also provides constraints for meeting the needs of an increasing population and housing needs.

Upper Dublin has an aging population.

The Township has a median age of 46 years old, compared to a median age of 43 in the 20-minute PMA. The percentage of households with one or more individuals 60 years or older in Upper Dublin increased by 14.7% over the past 12 years, from 35.8% in 2010 to 50.5% in 2022, and the number of residents aged 65+ in the 20-minute PMA around Dreshertown Plaza is projected to increase by 11% between 2023 and 2028.²

Figure 7: Share of Population by Age in Upper Dublin and Surrounding Areas

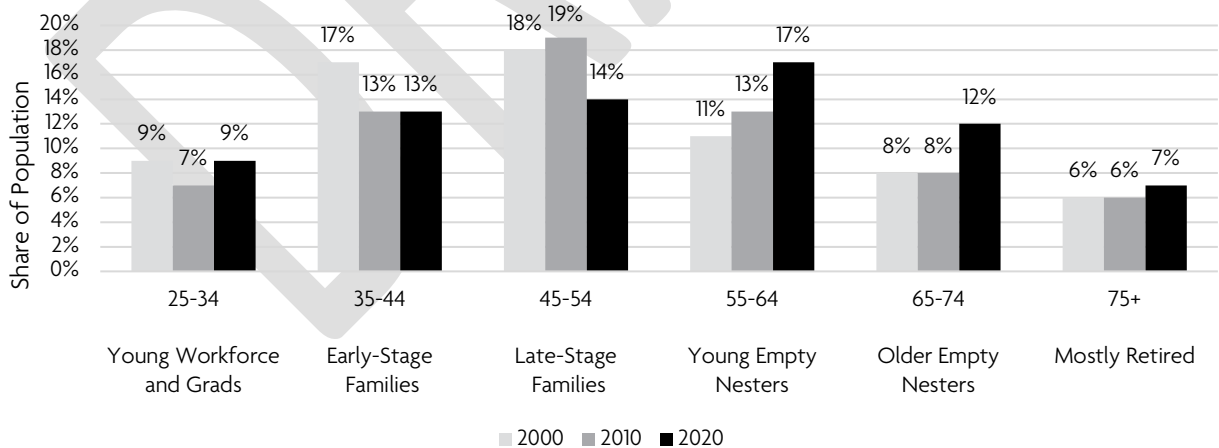
Source: ESRI (2023)



The population is aging and the share of young workforce and grads is stagnant and early-stage families is declining. Attracting younger generations to Upper Dublin is critical for the fiscal stability of the Township.

Figure 8: Share of Population by Age in Upper Dublin, 2000, 2010, 2020

Source: US Census (2000, 2010, 2020)



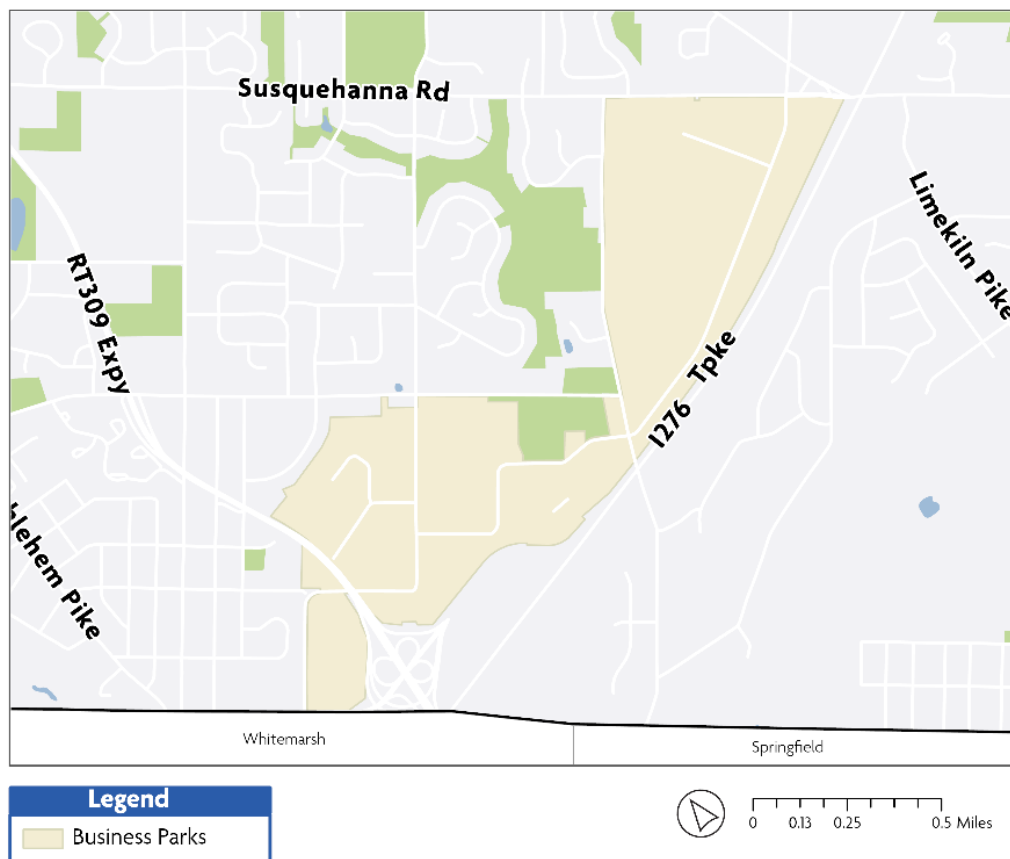
² U.S. Census. (2010 and 2022) American Community Survey 5-Year Estimates and 4Ward Planning. (2024) Market and Real Estate Analysis for the Upper Dublin Township Comprehensive Plan.

The Fort Washington Office Park has a 14% office vacancy rate and is part of an office submarket with the highest office vacancy in the suburban Philadelphia market.

The 536-acre Fort Washington Office Park has a 14% office vacancy rate. The office park is part of the Blue Bell/Plymouth Meeting/Fort Washington office submarket. This submarket has the highest overall vacancy rate of all the submarkets in the suburban Philadelphia region, at 26.8% vacancy compared to 21.7% across the region.³ The office market is not anticipated to return to pre-COVID-19 levels; therefore, the future of the Fort Washington Office Park will need to look different than it does today. This is a challenge that has already been identified as an opportunity for the Township. A new zoning district, Greater Fort Washington (GFW), was established in 2019 and lays the regulatory framework for creating a mixed-use, sustainable district.

Figure 9: Fort Washington Office Park Location

Source: Montgomery County (2024)



³ Cushman & Wakefield. (2023) Philadelphia Marketbeat, Office, Q3 2023

UPPER DUBLIN TOMORROW



UD Connections – A Vision for Upper Dublin

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. The School District is an interconnected asset within the community, providing educational excellence and serving as a partner in the Township. 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.

COMMUNITY VOICES

The UD Plan Vision and Guiding Principles were directly inspired by the community voices we heard throughout the planning process: in the community survey, at pop-up engagement events, and in focus groups.

The top takeaways from the community engagement efforts were:

- Desire for a more walkable and bikeable community.
- Housing variety is needed to meet the needs of the aging population and to address affordability concerns.
- The permitting process is a major barrier to development and home renovations.
- Open spaces and parks are cherished assets.
- Traffic congestion and speeding on roads is a concern.
- Desire for identifiable neighborhood centers.



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.

The proposed policies, programs, and projects in UD Plan align with the following principles. These principles should be upheld in the decision making and implementation that will follow the adoption of UD Plan.

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:

- Promote collaboration among residents to guide planning and development.
- Encourage redevelopment over developing existing open space and focus on sustainable and smart growth.
- Upgrade Township infrastructure to match needs of new development.
- Make complementary land use decisions, such as using compact urban form to reduce carbon emissions and protect open space.
- Continue working with the Upper Dublin School District and coordinate with surrounding municipalities to explore opportunities for service and facility efficiencies.
- Continue to seek out efficiencies in infrastructure and service provision.

Focus Areas

Community Priorities. A framework to organize the plan’s goals and actions based on community 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.

The three focus area chapters provide goals and actions to accomplish the community’s vision, while addressing and responding to the trends that are shaping the Township (i.e., the identified assets and challenges). These focus areas acknowledge that it is not a matter of if the identified trends will impact the Township’s future, but *how*. UD Plan presents an opportunity to address and leverage them to chart a path forward for the next decade.

Each focus area chapter begins with a brief introduction, as well as an explanation of consistency between the goal and Montco 2040, then follows this structure:

FA Goal 1: Goal Language

FA = Focus Area Acronym. Each focus area has a two-letter acronym that is noted in the introduction section of the chapter (e.g., AN for Accessible Neighborhoods). The goals are what the plan is accomplishing. These are the outcomes that the Township is striving to achieve to realize its vision for the future.

What do we mean? This section clarifies what the goal means by explaining certain vocabulary or elaborating on a concept.

What do we know? This section elaborates on what we know about the goal’s topic, including findings from community engagement, past plan review, and research and analysis of existing and future trends.

Why is this important? This section summarizes why this goal is important for furthering the vision.

How do we move forward? This section describes the actions. Actions are the implementable steps that will accomplish the goals. Actions have specific outputs, such as a policy, program, or project.

FA 1.A: Action language. Actions are labeled first by the Focus Area Acronym, second by the number of the goal, and third by the number (indicated by a letter) of the action (i.e., AN 2.C is the third action for the second goal in the Accessible Neighborhoods focus area).

Community insight and feedback is highlighted throughout the focus areas sections through:



Direct quotes



Survey, pop-up, and focus group findings

Case studies or local examples are also included throughout the document to provide additional context to the actions.



Milestones are provided for each action. These are key activities that need to be accomplished to successfully implement the action.

ACCESSIBLE NEIGHBORHOODS



Introduction

The Accessible Neighborhoods (AN) Focus Area details planning for neighborhoods that are physically and economically accessible: physically accessible by a range of mobility types, and economically accessible to a range of age and income levels.

Goals to achieve accessible neighborhoods in Upper Dublin are:

Accessible Neighborhoods (AN) Goal 1: [Create safe and accessible multi-modal connections.](#)

Accessible Neighborhoods (AN) Goal 2: [Prioritize housing that meets the varying needs of all existing and future community members.](#)



Consistency with Montco 2040

The goals and associated key actions in the Accessible Neighborhoods Focus Area are consistent with the following goals in Montco 2040:

Connected Communities

- Improve transportation quality and expand options for county residents and workers.
- Expand and connect county trails, local trails, greenways, natural areas, and parks.

Sustainable Places

- Provide more opportunities for residents to exercise and have healthy lifestyles.
- Support housing choices and opportunities to meet the needs of all people.
- Enhance community character and protect neighborhoods.

Vibrant Communities

- Flexibly adapt to changing market conditions and demographics.

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

What do we mean?

A multi-modal transportation network has options for people to travel in many ways – by car, foot, bike/scooter, and public transit.



Access to these options means they are located throughout Upper Dublin, ADA-accessible, affordable, safe, and well-connected. Safe and accessible multi-modal connections are created through well-connected and maintained sidewalk networks, complete streets (streets designed for all users), and traffic calming measures.

What do we know?

There are safety concerns and missing connections that limit people’s ability to walk and bike around Upper Dublin.

Safety Concerns

Vehicle crashes occur throughout the Township, some involving pedestrians, and some resulting in fatalities. There are a few clusters of roads that see a higher number of incidents, such as I-276, Route 309, Dresher Triangle, Norristown Road, Susquehanna Road, Welsh Road, and in areas around Limekiln Pike and Fitzwatertown Road. The Level of Traffic Stress map (Figure 13) also shows that the corridors with crash clusters have high traffic stress, deterring people from walking or biking on those corridors.

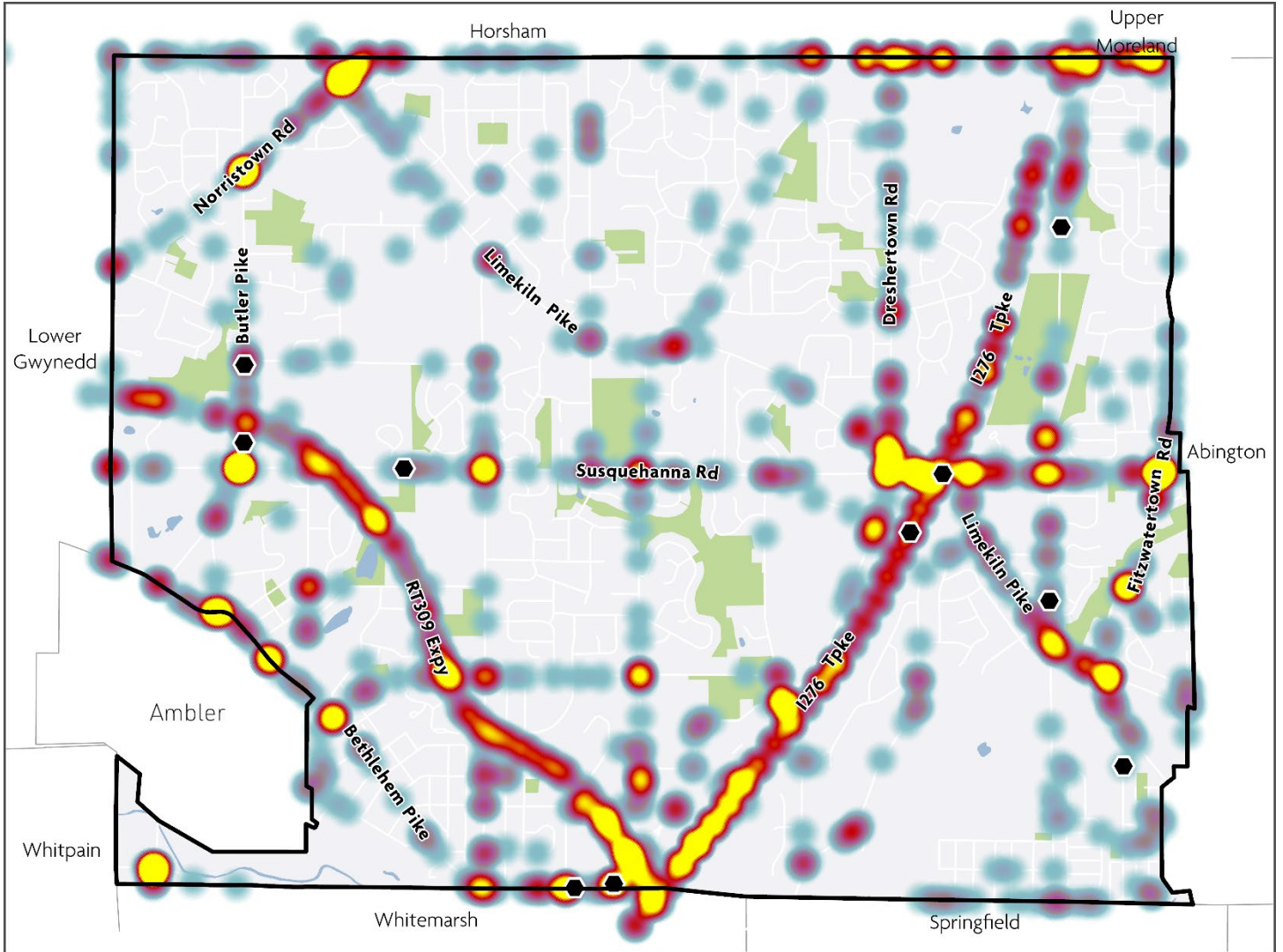
“Would love to walk more, but many roads just do not feel safe to do so.”

Residents described need for traffic control and speed calming, which will make streets safer for all roadway users, particularly pedestrians and cyclists. 60% of survey respondents noted improving pedestrian and bike safety as a priority, and 39% of respondents marked managing and controlling traffic as a priority. Roadway drainage and flooding were also identified as a safety concern. Effective safety measures include:

- Stop signs
- Signals and timing
- Signage
- Pavement markings
- Crosswalks
- Speed bumps/tables
- Traffic counting devices
- Drainage improvements

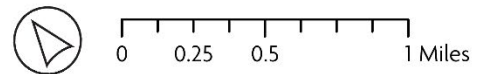
Figure 10: Vehicle Crashes in Upper Dublin Township

Source: PennDOT (2024)



Legend

- Fatal Crashes
- Amount of Crashes Resulting in Injury**
- Low Number of Crashes
- High Number of Crashes
- Parks



Missing Connections

Sidewalks are the most important connecting feature of the pedestrian environment and many lie within existing residential communities and Township parks. However, many areas of the Township lack connectivity to nearby regional destinations such as parks or shopping centers like Maple Glen or Dresher Triangle (Figure 12). According to the Montgomery County Planning Commission (MCPC)’s Walk Montco Plan, much of Upper Dublin is classified as ‘least walkable’ in Montgomery County (Figure 11).⁴ There are many locations with identified needed infrastructure improvements including repainting crosswalk and lane lines, and traffic light maintenance.

I-276 is a major barrier that splits the Township into two. Residents report you can only cross to the other part of the Township (from either side) via car because the underpasses are very dangerous to walk or bike. Other arterials act as barriers to walking or biking outside of your neighborhood, such as Pennsylvania Avenue, Route 309, Bethlehem Pike, Norristown Road, Limekiln Pike, Susquehanna Road, and Fitzwatertown Road. Further, neighborhoods with no sidewalks or gaps in sidewalks can have difficulty traveling within their immediate area (e.g., parts of the North Hills neighborhood do not have sidewalk access to their neighborhood parks).

Trails serve as an important addition to the sidewalk network to create walkable connections. Trails in Upper Dublin are mainly located within Township parks and could potentially be expanded to facilitate cross-Township connections, similar to the Fort Washington Cross County Trail being completed through the Township.⁵ This multi-use trail is providing connections to the Fort Washington District, as well as connecting Township Commercial Centers.



60% of survey respondents said improving pedestrian and bike safety measures along major corridors is a priority.



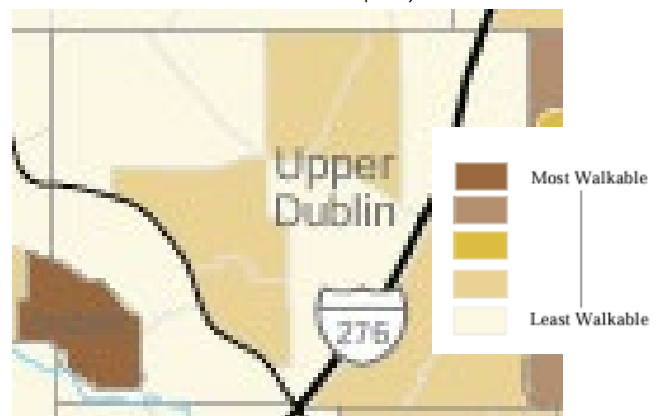
“Connect trails to be able to walk and bike safely. Trails and sidewalks abruptly close, forcing you to go on busy dangerous streets. e.g., Dreshertown Rd. from Dublin Hunt to Dreshertown shopping center or to the Promenade.”



51% of survey respondents said connecting neighborhoods to transit, parks/trails, and other amenities is a priority.

Figure 11: Walk Montco Walkability Map

Source: Walk Montco (2016)

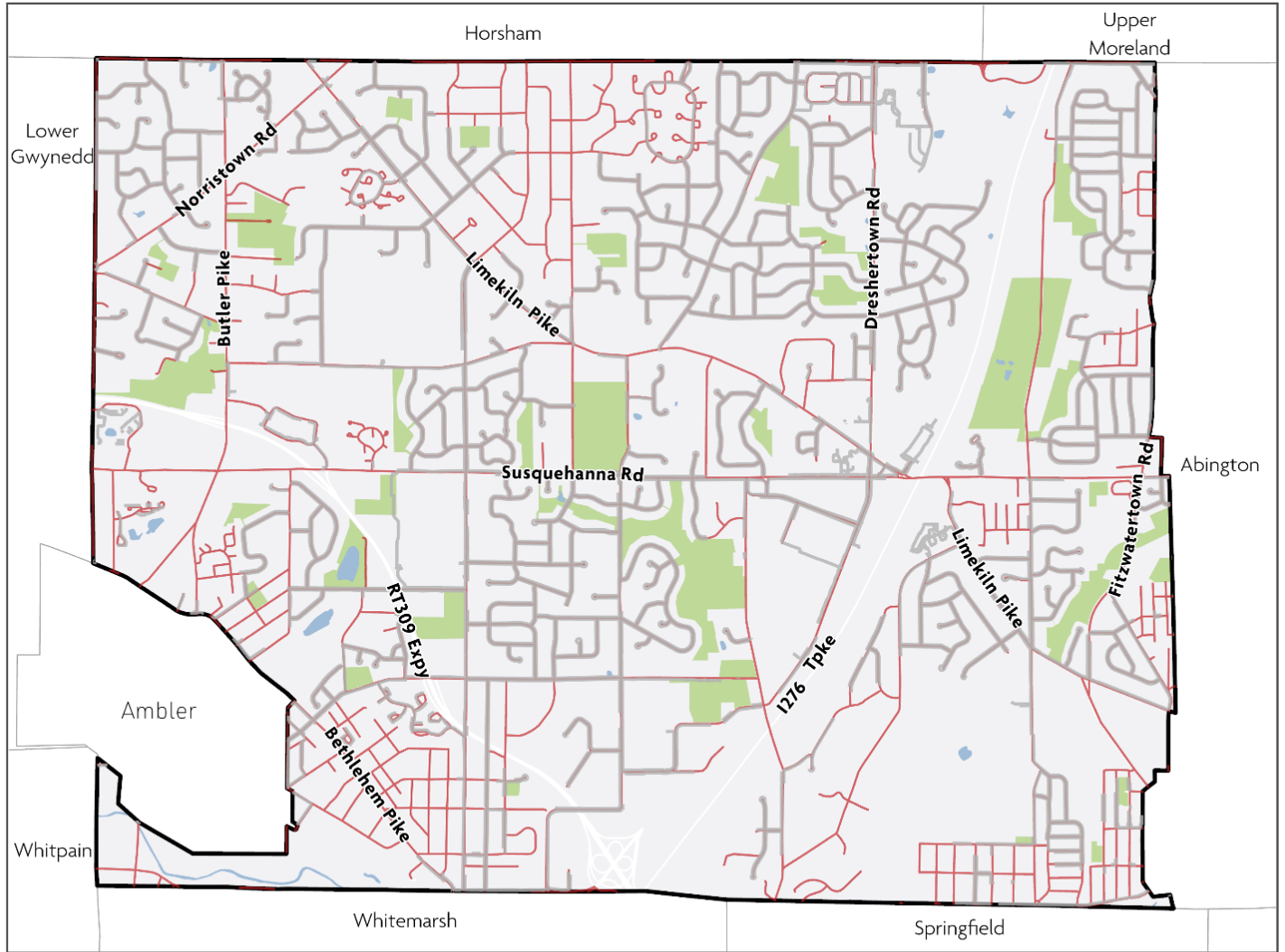


⁴ MCPC. (2016) Walk Montco: Montgomery County Walkability Study.



⁵ Upper Dublin Township. (2024) Municipal Authority Projects.

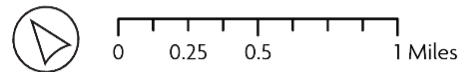
Figure 12: Sidewalk Network and Gaps

Source: Montgomery County Planning Commission (MCPC) (2022)



Legend

-  Existing Sidewalk Network
-  Sidewalk Gaps





The Upper Dublin Township Open Space Plan identified 70 “missing connections” throughout the Township that should be filled to facilitate travel between neighborhoods. The plan includes details on location, length of the gap, and connection type (i.e., sidewalk, trail, pedestrian crossing, underpass, etc.). The missing connections should be prioritized based on connections made to schools, parks/open space, trails, adjacent neighborhoods, businesses; potential for grant funds estimated cost; existing access easements; and other factors. The Open Space Plan includes a prioritization worksheet to aid the Township in implementing projects based on greatest need and impact.

Increasing the use of trails, especially among a variety user groups, will require a strategic approach to community engagement that addresses access limitations, communications challenges, fear of discrimination, and a lack of awareness.⁶ Genuine partnerships between the Township and communities of varying backgrounds within Upper Dublin are necessary to understand the specific barriers limiting trail uses, and to develop collaborative solutions. Key design aspects to improving walkability are ADA compliance, safe intersections, and traffic calming.

Missing connections have also been identified in the bicycle network. While there is a widespread sidewalk network in the Township, there are only a few bike lanes and facilities, with a bike lane on two segments of Susquehanna Road. Limekiln Pike is prioritized for construction of a bike lane. The Delaware Valley Regional Planning Commission (DVRPC) conducted a Level of Traffic Stress (LTS) assessment for its nine-county region, classifying each roadway on a scale of 1 to 4, 1 having low traffic stress and being comfortable enough for most people to bike on, and 4 having high traffic stress where only the most experienced and fearless bikers will travel.⁷ This assessment was based on the number of lanes, effective vehicle speed, and the presence and type of bicycle facility on the road segment. In Upper Dublin, low-stress areas for bikers are in neighborhoods that tend to be cut off from another by higher stress roadways (Figure 13). Reducing the level of traffic stress on key LTS 3 road segments can improve these missing connections.

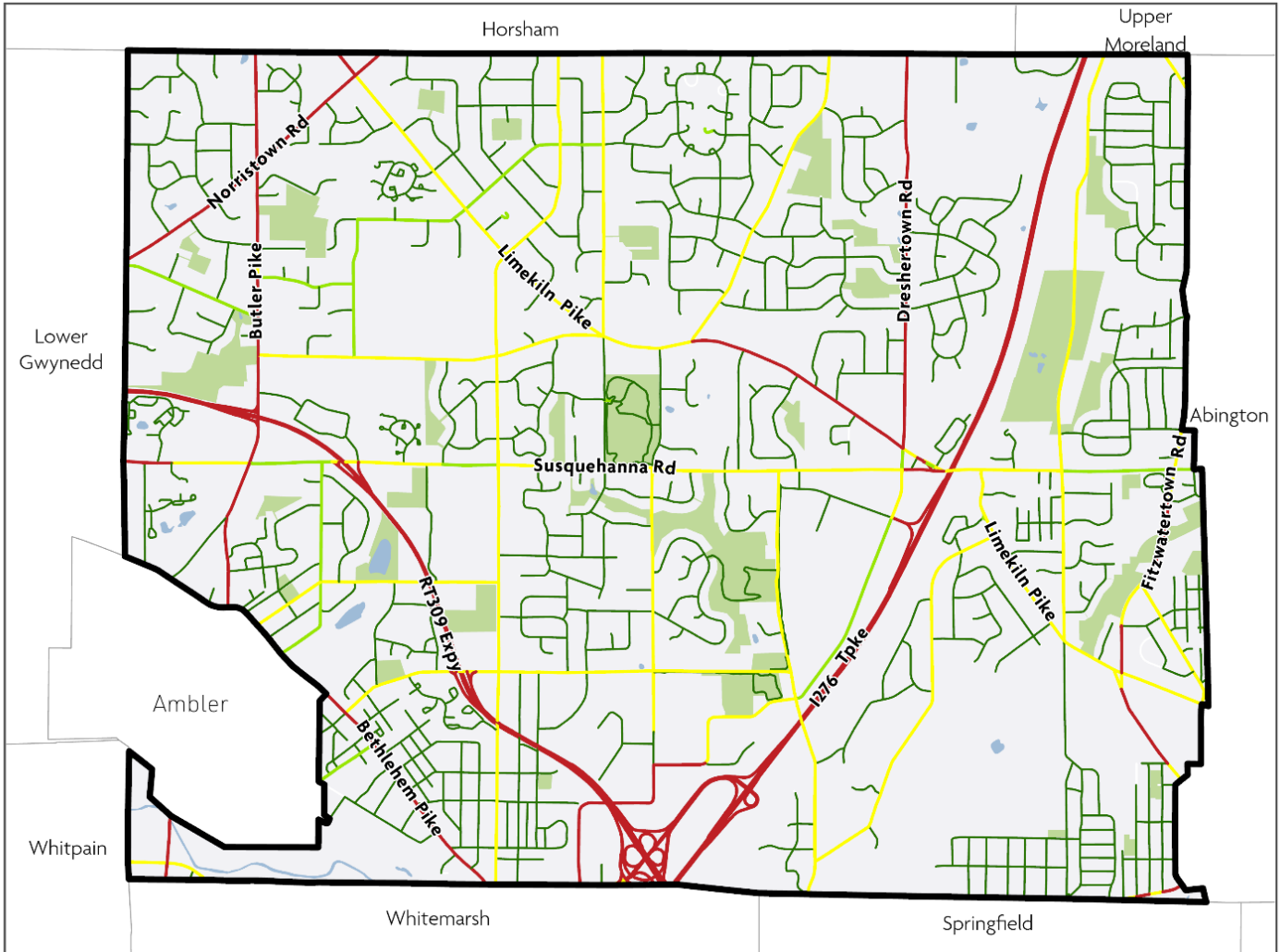
Using this data, DVRPC developed a mapping tool to help communities prioritize missing bike connections. The analysis utilized a shortest path algorithm to determine the shortest paths from every census block in the region to every other census block within five miles, looking only at LTS 1, 2, or 3 segments. This shows which roadway segments are part of many shortest paths and should be prioritized for improvements. DVRPC further analyzed these segments based on their proximity to Indicators of Potential Disadvantage (IPD), populations of interest under Title VI and Environmental Justice such as youth, older adults, females, racial and ethnic minorities, foreign-born, limited English proficiency, disabled, and lower income). Segments were also analyzed based on their proximity to schools, trailheads, and transit stops to find missing connections to key locations in communities. These analyses were used to identify LTS 3 roads that would allow for the most connections by county and have the greatest impact on communities. Figure 14 shows the results of this analysis in Upper Dublin, marking segments in the top 50% priority segments for roadway improvements that will reduce traffic stress. Improvements can include speed calming measures and adding bicycle facilities, for example. This map can be used in tandem with the Open Space Plan’s missing connections list.

⁶ MCPC. (2020) [Montgomery County Trail Access, Diversity, and Awareness Plan](#).

⁷ DVRPC. (2021). [Bicycle Level of Traffic Stress \(LTS\) and Connectivity Analysis](#).

Figure 13: Bike Level of Traffic Stress Map

Source: Delaware Valley Regional Planning Commission (DVRPC) (2021)



Legend	
Level of Traffic Stress	
—	1 (Lowest Stress)
—	2
—	3
—	4 (High Traffic Stress)

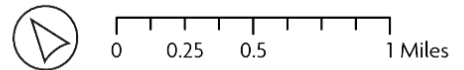


Figure 14: Bicycle Route Regional Connectivity Priorities

Source: DVRPC (2021)

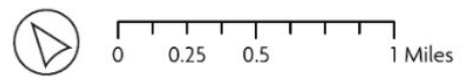
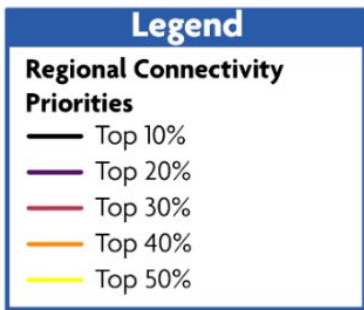
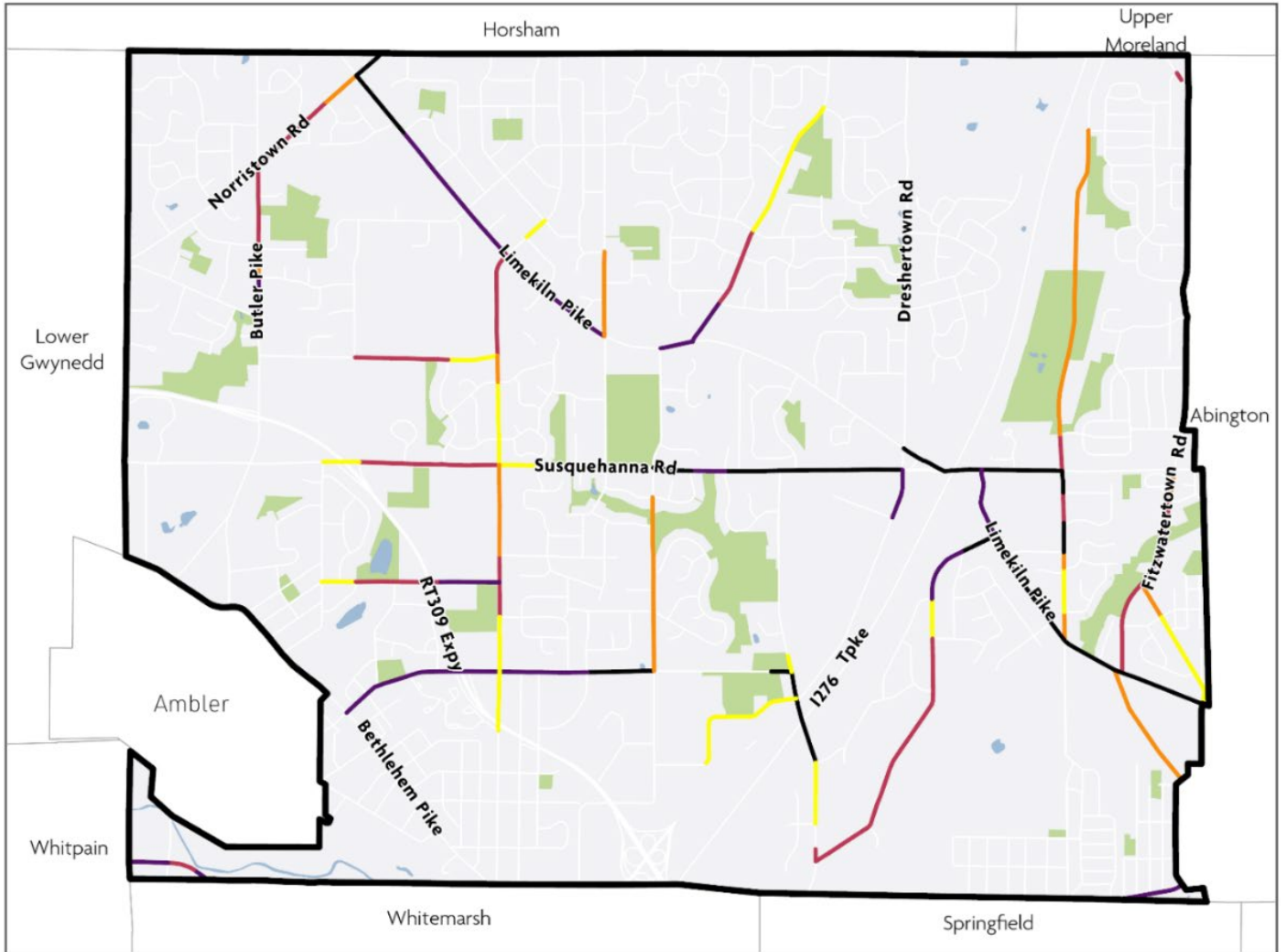
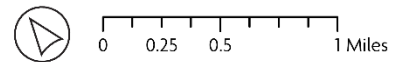
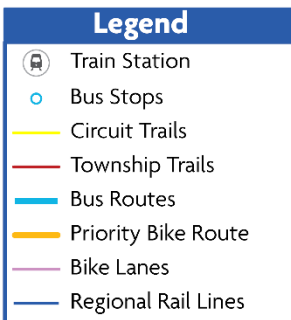
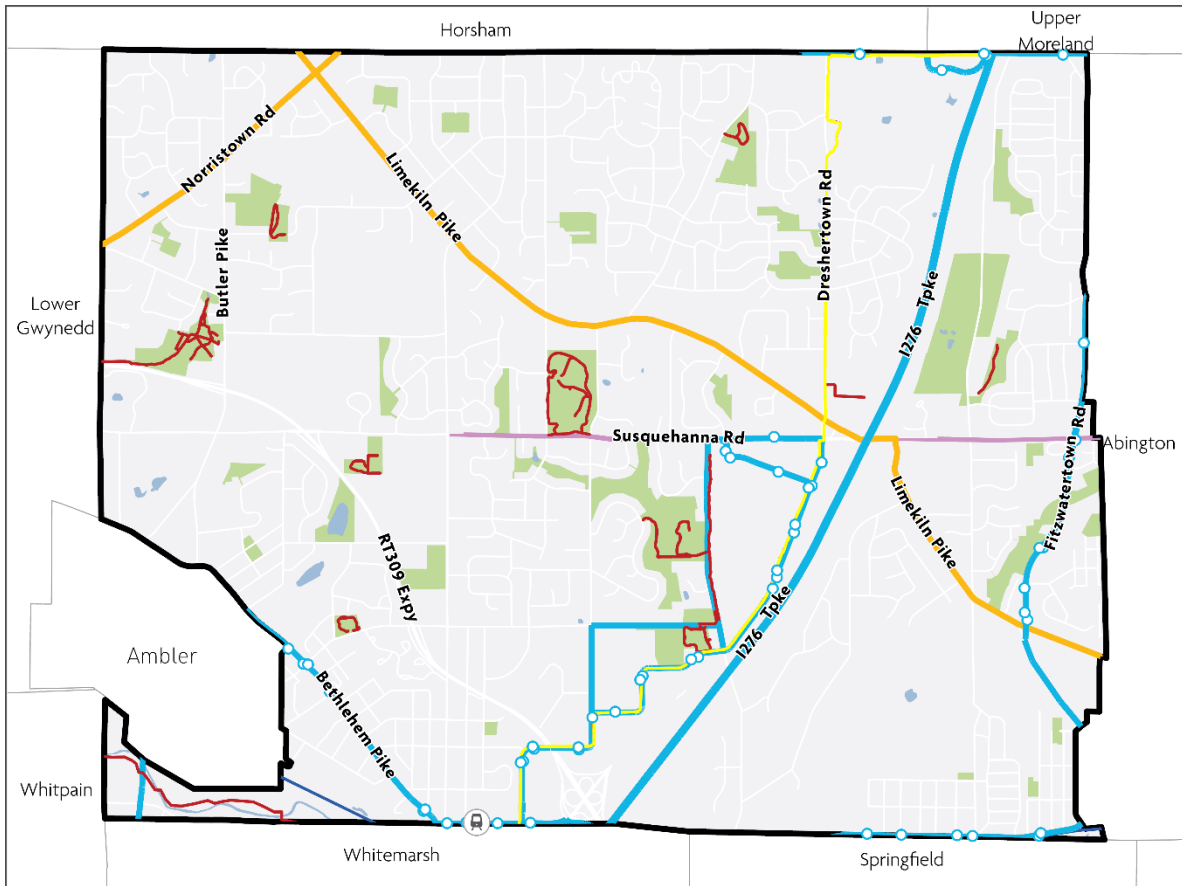


Figure 15: Upper Dublin Multi-Modal Transportation Network

Source: Montgomery County GIS and SEPTA Open Data (2024)



There are few public transportation options in Upper Dublin: SEPTA’s regional rail and Bus Routes 94, 95, and 201. The bus routes are designed to bring riders to other parts of SEPTA’s system and do not circulate through the Township. The inability to travel within the Township via public transit make it more important to address pedestrian and bike connections to facilitate connections public transit cannot currently provide. Upper Dublin’s multi-modal network is seen in Figure 15.



Generally, bus routes run on a 30-minute to an-hour schedule at each bus stop along their routes starting at around 7:00 am until 7:00 pm. On Sundays, bus service is more limited with service being suspended on Sundays on the 95 and 201 bus routes. SEPTA’s Bus Revolution which is currently ongoing will potentially affect bus routes in Upper Dublin. If changes are made to the bus routes and service, Township residents may lose their connections to other public transit lines. Upper Dublin Township currently engages with SEPTA on a Bus Revolution Steering Committee which meets on a regular basis to discuss impacts of proposed recommendations.

Why is this important?

- The benefits of walkability and bike-ability are well documented, including positive impacts on health, the environment, safety, equity, and economic development.⁸ However, there is a mismatch between pedestrian needs and the existing infrastructure in many parts of the Township, making these benefits more difficult to realize.
- Lack of public transportation options means that people are forced to rely on a personal vehicle to get around the Township. Filling gaps in the sidewalk network offers an alternative way for people to get to school, work, retail destinations, outdoor areas, and more.
- Safe connections and complete streets create more sustainable and vibrant neighborhoods by allowing people to walk to schools, parks, and other essential neighborhood amenities.
- The hidden cost of transportation impacts everyone who lives, works, and plays in Upper Dublin. Residents in the Township pay between 18% and 26% of their income on transportation costs on top of housing costs and other necessary living expenses.⁹ The majority of these costs are related to owning personal vehicles. Filling missing sidewalk connections and making streets safe for all users can help reduce these costs per household by providing more options to people beyond traveling in a personal vehicle.

How can we move forward?

Action AN 1.A: Improve safety conditions for all roadway users across the Township.

Upper Dublin should first conduct roadway safety assessments at high crash locations. Based on the vehicle crashes map (Figure 10), locations with clusters of crashes include:

Corridors with Crash Clusters	Intersections with Crash Clusters
<ul style="list-style-type: none"> • Route 309 • Susquehanna Road from Dreshertown Road to Fitzwatertown Road • Limekiln Pike from Twining Road to Fitzwatertown Road • Bethlehem Pike from Highland Avenue to Argyle Avenue • Pennsylvania Avenue from Bethlehem Pike to I-276 • Welsh Road from Jarretstown Road to Kimball Avenue 	<ul style="list-style-type: none"> • Fitzwatertown Road and North Hills Avenue • Butler Pike and Susquehanna Avenue • Susquehanna Avenue and Fort Washington Avenue • Norristown Road and Butler Pike • Norristown Road and Limekiln Pike

⁸ MCPC. (2016) *Walkability and Your Community: Health, Safety, and Economics*.

⁹ Center for Neighborhood Technology. (2023) *Housing and Transportation Affordability Index*.



The Engineering Department and Public Works Department (PWD) should conduct preliminary safety assessments for these six corridors and five intersections to identify challenges and potential safety interventions. Document roadway layout (number of lanes, lane width, existence of sidewalks, sidewalk width, crosswalks, bike lanes, etc.), sidewalk conditions, signage and signals, average vehicle speeds, past incidents, pavement markings, and any other notable conditions impacting safety. These findings should be summarized into a report for the Board of Commissioners that outlines what types of surveying and design services are needed for each site (i.e., comprehensive corridor plan, traffic assessment, roadway redesign, etc.). This should include considerations for what the Township can complete in-house with existing resources and what would need to be outsourced.

Upon Board review and approval, Parks and Recreation, in collaboration with PWD, should be responsible for maintaining a log of recommended safety improvements and advancing improvements to each site as applicable. Parks and Recreation and PWD would coordinate with the Engineering Department for surveying and design services and with the Finance Department to develop cost estimates for improvements. Parks and Recreation would be tasked with prioritizing locations based on incident data and relation to filling missing connections described under Action 2 based on their involvement with implementing the Open Space Plan.

Starting with the highest priority location, the Engineering Department would conduct a more detailed site survey for each location to identify needed safety improvements. Other surveying and design services will be used for each site as applicable as determined in the initial assessment report approved by the Board. The goal of this second assessment is to determine appropriate site-specific interventions. Each site will need unique changes to improve pedestrian and bicycle safety. Interventions may include:

- Speed bumps/tables
- Safe crosswalks
- Stop signs/signals
- Pedestrian signals
- Buffers for bicycle lanes
- Redesign number of lanes or lane widths
- Reduce speed limits

As site plans are developed by the Engineering Department, they would be presented to the Board of Commissioners for approval and would follow requirements for public comment periods. PWD would then work with the Finance Department to develop cost estimates. **Following the process used for the Curb and Sidewalk Program, Parks and Recreation and PWD would present a list of site improvement projects to the Board of Commissioners each year for their approval during the annual budget process.**

Milestones

- Conduct roadway safety assessments at listed locations with crash clusters.
- Present initial assessment findings and recommendations to the Board of Commissioners for approval on surveying needs for each site.
- Conduct detailed survey and design work for each site.
- Develop cost estimates for each site.



Action 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.

Missing connections have been identified for both the pedestrian and bicycle networks in Upper Dublin. Upper Dublin should maintain a log of these roadway segments and prioritize these locations for measures to reduce traffic stress and improve pedestrian and bicycle connectivity. These connections should be added to the Township’s Official Map to proactively plan for needed improvements. See Action RE 1.D for recommendations regarding an Official Map. The Township should conduct a priority assessment to assist in choosing improvement projects to advance each year. The 2023 Open Space Plan provides a prioritization worksheet to assist in prioritizing missing connections to address.

Gaps in the **pedestrian network** were identified in the 2023 Open Space Plan. Upper Dublin should use the 2023 Open Space Plan Missing Connections Prioritization Worksheet to prioritize the list of 70 identified missing connections. Gaps in the **bicycle network** were identified through DVRPC’s Bicycle LTS and Connectivity Analysis, which provides prioritization levels for LTS 3 segments in each municipality. This analysis identifies gaps based on connections they could provide to schools, trail access points, and transit options. The Township should consider combining logs of missing connections in the pedestrian and bicycle network into one prioritized list to streamline efforts to address existing gaps. Gaps that align with locations of crash clusters should be incorporated into safety improvement projects described in Action AN 1.A.

The Township should follow a similar approach detailed for Action AN 1.A. to fill missing connections. Starting with the top five priority connections, the Public Works Department should work with the Engineering Department to survey and prepare designs for each site, and with the Finance Department to develop cost estimates. The Parks and Recreation Department should present a list of sites for improvement projects to the Board of Commissioners for approval during the annual budget process.

Milestones

- Update the Missing Connections map to include gaps in the bicycle network identified through DVRPC’s Bicycle LTS and Connectivity Analysis.
- Conduct detailed survey and design work for each site.
- Develop cost estimates for each site.
- Present a list of missing connection projects to the Board of Commissioners annually for approval during the budget process.

Action AN 1.C: Provide streetscaping and beautification improvements along key neighborhood corridors.

Connections in the pedestrian and bicycle network may exist physically but not all are friendly to users. Streetscaping efforts with a focus on factors impacting the pedestrian experience can improve connections within neighborhoods and to key destinations like schools and parks. Examples of these improvements include benches, shade trees, bike racks, public art such as murals, pocket parks, street trees, and hardscaping improvements to support traffic calming and safety efforts described in Action AN 1.A.

Using the Greater Fort Washington/Municipal Authority landscaping plan as a reference, the Community Planning and Zoning Department should develop streetscaping and beautification design guidelines with the Township Planning Commission to encourage use of these elements in Upper Dublin. Guidelines should include review criteria describing what outcomes the Township is looking for and a ‘look book’ to support design efforts. These would ensure that considerations are made at the human-scale before designs are finalized and go into construction phases. The Planning Commission would present the guidelines and criteria to the Board of Commissioners for approval. Upon approval, the Planning Commission for use in design review for development proposals along key neighborhood corridors as defined in the guidelines.

Action AN 1.D: Establish a community bike training and access program.

In addition to addressing roadway safety issues (adding bike lanes, buffers, etc.), expanding bicycle infrastructure in Upper Dublin is needed to increase bike-ability. Residents expressed a desire for a bike share program in the Township. Helping communities access bicycles themselves can provide a transportation option previously inaccessible to some.

Upper Dublin should establish a task force with regional stakeholders, such as MCPC and the Greater Valley Forge Transportation Management Association (GVF-TMA), DVRPC to design and implement a bike training and access program. This could include services such as public bike safety training sessions, bike repair workshops, borrow-a-

Milestones

- Develop design guidelines and review criteria to encourage wider use of streetscaping and beautification improvements.
- Present guidelines and criteria to the Board of Commissioners for approval.
- Incorporate guidelines into the review process for development proposals along key neighborhood corridors.

Milestones

- Establish Bike Training and Access Program Task Force.
- Develop Bike Training and Access Program Report.
- Present findings and recommendations to applicable Boards.
- Contribute to establishing a bike training and access program with the task force partners.
- Bike Share Program implemented in Upper Dublin.

bike options from the public library, or other actions that could encourage biking in communities. The task force would be responsible for:

- Analyzing potential for a bike training and access program.
- Identifying costs and resources.
- Engaging with the public to design the program.
- Presenting findings and recommendations to respective partners' Boards.
- Recommending program structure and governance.

DRAFT



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

What do we mean?

Housing is an essential part of what makes a neighborhood accessible. Do housing options in a community meet the needs of that community’s residents? A greater variety of household sizes and demographics require a greater variety of housing choices, such as different needs in size and design, affordability, and available amenities.

By prioritizing the creation or rehabilitation of housing options to meet a variety of household needs, Upper Dublin supports the needs of many different community members. Action items under this goal will allow people to stay in the Township as their needs change. Some examples include:

- Older adults can “age in community” (i.e., remain within Upper Dublin) by downsizing and moving into housing that meets their level of care needs (e.g., smaller single-family home, townhouse, condo or apartment, age-restricted community, assisted living facility, etc.).
- A one- or two-person adult household has options for homes that have two-bedrooms rather than three or four, which exceeds their needs.
- Expanding families can move from their existing homes into larger homes (perhaps recently sold by an older adult household who is downsizing) to meet new needs.
- A teacher at Upper Dublin School district can reduce their commuting time by renting an apartment closer to their school.
- Families with adult children can downsize or add another housing unit on their property for their children.
- Residents can easily navigate the permitting processes for needed renovations to stay in their homes.
- Young couples can rent an apartment in Upper Dublin as they prepare to buy a house in the area.

What do we know?

Variety, availability, and affordability of housing options in Upper Dublin are not meeting community needs.

Housing Variety

The majority of housing units in Upper Dublin are single-family units (89.3%); however, the variety of household sizes and demographics in the Township require a greater variety of housing types. For example, as the population continues to age, additional older adult and senior housing options will be needed to meet those residents’ needs. The percentage of households with one or more people 60 years or older in Upper Dublin increased by 14.7% in a 12 year period, from 35.8% in 2010 to 50.5% in 2022¹⁰, and the number of residents aged 65+ in the 20-minute PMA around Dreshertown Plaza is projected to increase by 11% between 2023 and 2028.¹¹

¹⁰ U.S. Census. (2010 and 2022) American Community Survey (ACS) 5-Year Estimates.

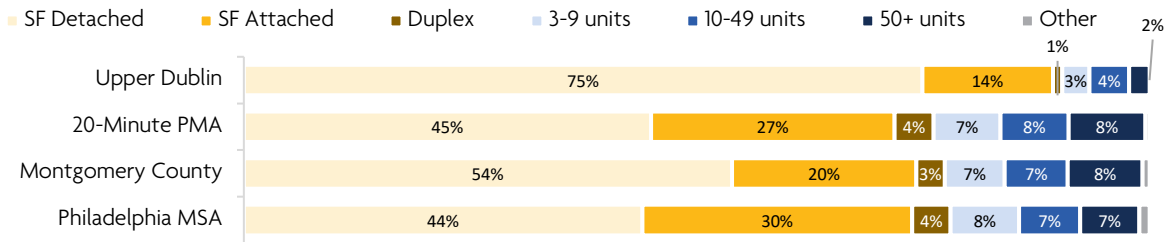
¹¹ ESRI Community Analyst.



Compared to the 20-minute PMA around Dreshertown Plaza, Montgomery County, and the Philadelphia MSA, Upper Dublin has a much higher portion of single-family homes (89.3% versus 71.9%), and lower portions of multi-family units (e.g., 1% versus 4.3% duplex; 3% versus 7.4% 3-9 units).¹²

Figure 16: Housing by Structure Type

Source: ESRI Community Analyst (2021)



Note: Single-Family Detached (SFD) represents housing units which stand alone on a lot and do not share any party walls. Single-Family Attached (SFA) represent housing units in which two or more units share a vertical party wall but have individual entries into the units, frequently with common open spaces.

The majority of neighborhoods in Upper Dublin are zoned as A and B Residential Districts (Figure 17). Single-family detached dwellings are the only permitted residential use in these districts. Townhomes are allowed as a conditional use in B Residential districts. Only 1% of the Township is zoned as C Residential, which allows duplexes/twin houses as a special exception, or North Hills (NH) Residential, which allows duplexes/twin houses and multi-family options. The regulations in most residential districts do not allow for multi-family housing options, which limits the ability to incorporate a variety of housing options within the existing residential neighborhoods.¹³

“We need to have housing developments that are not cookie-cutters. Not all houses in a development should be the same. There should be one appropriate for people just getting started, for those raising children, for empty nesters, and condos for any of those. There should be more ranchers for those of us with disabilities. And there should be much more low-income housing.”

In evaluating housing needs in their community, 14% of survey respondents reported that the variety of housing types is not adequate and 10% indicated that they do not think the housing needs of others are being met. In conversation with community members at the pop-up events and in focus groups, residents shared housing challenges they have faced (e.g., inability to move into a larger house in the area, lack of options for downsizing, adult children not being able to afford housing in the Township, etc.). If Upper Dublin does not meet the regional share for variety of housing types, existing and prospective residents may look outside of the Township to meet their housing needs. In order to retain population, attract younger residents and families, and meet the needs of the growing older adult population, it is essential for the Township to vary its range of housing types.

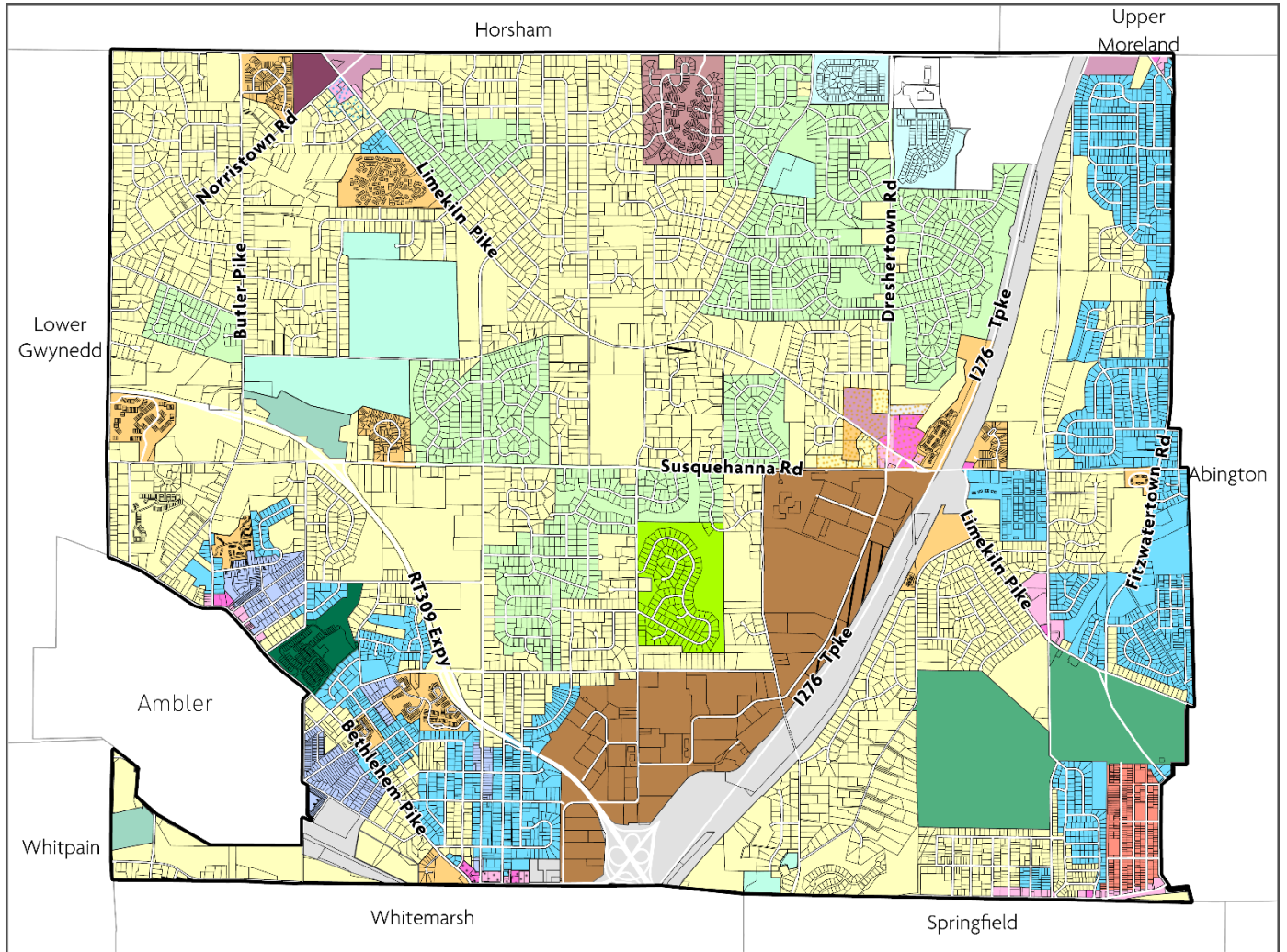
¹² ESRI Community Analyst. (2021)

¹³ [Upper Dublin Township. \(2024\) Code of Ordinances.](#)

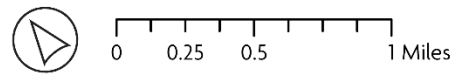
Figure 17: Zoning Districts in Upper Dublin Township

Source: Upper Dublin Township (2024)

Note: Office Center District has mixed-use development incorporated.



Legend		
Zoning Districts		
A - A Residential	DO - Dresher Overlay	MGO - Maple Glen Overlay
A1 - Planned Residential	EC - Employment Center	MHD - Mobile Home
A2 - Planned Residential 2	ECO - Employment Center Overlay	MRD - Mixed Residential
AHS - Apartment House Special	FWVO - Fort Washington Village District Overlay	MRH - Mixed Use Residential Historic District
AQH - Age Qualified	GFW - Greater Fort Washington District	NH - North Hills Residential
B - B Residential	INST - Institutional	OC - Office Center
C - C Residential	JVO - Jarretown Village Overlay	RE - Recreational
CRI - Commercial Retail Class I	MD - Multi-Dwelling	SC - Shopping Center
CRL - Commercial, Retail Class L		



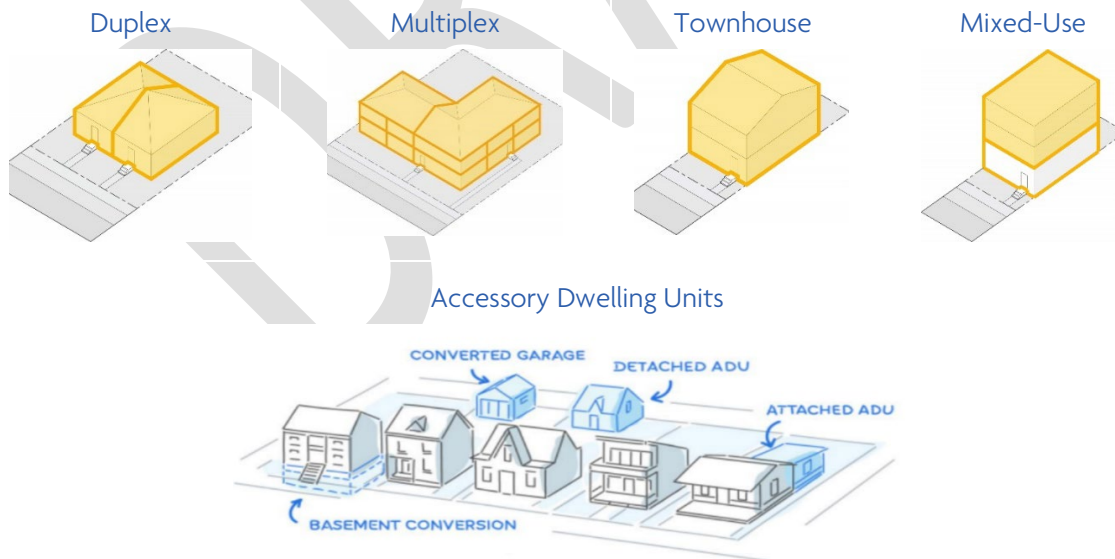
While individual housing needs change with age, they can also shift for whole demographic groups. There has been a nationwide shift in the demand for different types of senior housing. While assisted living facilities were very popular in the past, older adults are looking for options to age in place that allow them to stay active before they need to move into assisted living facilities. Older adults are tending to prefer options with some supportive services and amenities such as maintenance and landscaping, but that still allow them to live independently. This suggests a need for a shift to “age-targeted” rather than “age-restricted” units for older adults.

37% of survey respondents said providing options for older adults to age in the Township is a priority.

The housing and community development industry promotes the development of “missing middle housing,” which refers to a range of multi-unit house-scale buildings compatible in scale and form with detached single-family homes.¹⁴ Examples include duplexes, multiplexes, mixed-use housing such as residential units over retail establishments, and accessory-dwelling units. These types of housing units are missing in many communities today and are referred to as middle housing because they fall in the middle of a spectrum between single-family homes and mid-rise to high-rise apartment buildings. A walkable context, small building footprints, lower perceived density, and smaller well-designed units are all characteristic of missing middle housing units. The largest barrier to missing middle housing is conventional zoning codes; adopting a form-based code can encourage incorporating these units into existing neighborhoods.

Figure 18: Examples of Missing Middle Housing

Source: First Row – Opticos Design; Second Row – City of Cincinnati



¹⁴ [Opticos Design, Inc. \(2024\) Missing Middle Housing.](#)

Housing Availability

Upper Dublin has a tight housing market, partly seen through low housing vacancy rates (0.9% homeownership unit and 3.1% rental unit vacancy in 2022)¹⁵. Residents report that it is difficult to move within the Township when their home no longer meet their needs because there are few options on the market. While the population is expected to stay relatively flat through 2028,¹⁶ developing new housing could help alleviate the tight market.

Interviews with local real estate professionals suggest there is demand for more variety of housing types in the Township, including more townhome and single-floor living options. Based on residential supply and demand estimates projected out ten years, the number of households in the 20-minute primary market area around Dreshertown Plaza is projected to increase by 4,340 over the next 5 years. UDT has the potential to support between 844 and 1,407 additional housing units by 2028, in addition to those already approved for construction.¹⁷

Upper Dublin Township has seen residential development proposals in recent years. In 2023, the Township entered eight development submissions to the County for a total of 29 acres of proposed residential development. These were for the following proposed units: one single-family detached unit, two single-family attached units, and 385 multi-family units.¹⁸ Two of these developments were in the top 10 largest residential properties proposed in the county in 2023: 525 Virginia Dr – Luxor: 225 units, multi-family, and 530 Virginia Dr: 160 units, multi-family. A total of 475 units have been permitted in Township since 2016.¹⁹ Multi-family residential developments planned in other nearby communities can increase the potential market for businesses in Upper Dublin. However, if the Township doesn't also provide these options, then other communities will draw people from Upper Dublin.

Upper Dublin is a built-out community; only about 2.4% of land in the Township is currently vacant. Vacancy refers to properties with no structures on them. Vacant land in the Township is made up of residential, industrial, and commercially zoned parcels that can be developed at any time; parks and open space are not considered 'vacant' because the land is actively used for recreational and environmental purposes.

The majority of land in Upper Dublin is zoned for residential purposes. Of this, only 73.4 acres are currently vacant (1.6% of residential land, or about 42% of all vacant land). Based on the locations and sizes of vacant residential parcels, infill development in existing neighborhoods is a key strategy to increasing the overall housing supply and availability.

¹⁵ ESRI Community Analyst. (2022)

¹⁶ U.S. Census and ESRI Community Analyst.

¹⁷ 4Ward Planning. (2024) Market and Real Estate Analysis for the Upper Dublin Township Comprehensive Plan.

¹⁸ [MCPC. \(2023\) 2023 Annual Summary: Subdivision, Land Development, and Zoning Activity.](#)

¹⁹ U.S. Census Bureau. (2016-2023) Building Permits Survey and U.S. Department of Housing and Urban Development HUD) State of Cities Data Systems (SOCDS) Building Permits Database.

Housing Affordability

Housing costs are rising across the country, greatly impacting Upper Dublin and the wider Philadelphia region. 23% of owner-occupied households and 42% of renters in the Township are housing cost-burdened, meaning they spend more than 30% of income on housing costs, which is similar to rates across the region.²⁰

Residents report that the majority of housing options are too expensive and associated taxes make it difficult for residents to age in place, downsize, or remain in the Township. Many of the new multi-family units are also unattainable for some based on the monthly rent prices.

Median sales prices in Upper Dublin increased by \$50,000 (9.7%) between 2021 and 2022 (from \$515,000 to \$565,000); a continuation in rising home prices.²¹ Between 2012 and 2017 Montgomery County’s median housing sales price increased by 11.8% and the median gross rent increased by 10.6%, while the national inflation rate was 4.3% in that timeframe. The County also reports that an increasing number of older adults cannot afford to age in place.²²

Within Upper Dublin, 23% of owner-occupied households pay more than 30% of their incomes on housing (considered cost-burdened by the U.S. Department of Housing and Urban Development (HUD)) and 24% of all renter households pay more than 30% of their monthly incomes on rent. The estimated median gross rent (contract rent plus the estimated average monthly cost of utilities) in the Township is approximately \$1,730 per month, which may be out of reach for many low-income households. In 2023, a two-person household in Montgomery County with an income of \$44,650 would qualify as a very low-income household (50% of Area Median Income), and a two-person household with an income of \$71,400 would qualify as a low-income household (80% of Area Median Income). Assuming a household can afford 30% of its monthly income on housing, an affordable gross rent or mortgage payment would be \$1,120 per month for a two-person very low-income household and \$1,790 per month for a two-person low-income household.

One of Montgomery County’s housing priorities is to increase the availability of workforce housing, which is housing that is affordable to the working public (i.e., people making 80 to 100% of the area’s median income).²³ This level of housing affordability encourages diverse communities and provides opportunities for families to continue living in the same community as their needs change. Encouraging the development of workforce housing permits essential members of the workforce to live near their place of employment, which can reduce commuting time and traffic congestion. It also strengthens the economy by helping



34% of survey respondents said addressing housing affordability is a priority.

²⁰ ESRI Community Analyst.

²¹ MCPC and Montgomery County Board of Assessment Appeals. (2022) Median Prices for Housing.

²² [MCPC. \(2021\) Homes for All: A Plan for Montgomery County.](#)

²³ [MCPC. \(2024\) Workforce Housing.](#)

employers attract and retain critical workers. These benefits are essential to planning for accessible neighborhoods.


Workforce housing is important for Township employees as well. Multiple Upper Dublin Township Departments noted the desire to have more employees live in the Township, citing the potential this creates for more meaningful connections between Township staff and residents, a greater quality of life for staff, and a deeper knowledge of the community they serve.

The Market and Real Estate Analysis for Upper Dublin Township (Appendix E) finds that due to existing pent-up demand from primary workers who commute into the township, by 2028, there will be an estimated net demand for approximately 14,070 residential units in the 20-minute Primary Market Area (PMA). If buildable residential land were available in the Township, the analysis conservatively assumes that the township could have an opportunity to capture between 6% and 10% of pent-up residential demand in the PMA, equivalent to between approximately 844 and 1,407 units by 2028. Increasing the supply of different types of housing units will help provide housing at more affordable price points.


Neighborhoods in Upper Dublin require maintenance of the existing housing stock.

The majority of housing units in Upper Dublin were built between 1950 and 1989 (67.1%). The median year units were built is 1971, making the median age of homes 53 years old, and 11.5% of units were built before 1939.²⁴

Structures have been designed to be more resilient to weather and environmental hazards as building codes and construction practices improve over time. Older buildings are more vulnerable to impacts from tornados or windstorms, winter storms, earthquakes, and flood events. As structures age there are a variety of maintenance and repair needs that can arise. These can be very costly to people, forcing them out of their homes, or to avoid addressing issues before they become critical. Township support for home maintenance and repairs can help people stay in their homes and protect historic residential assets.



42% of survey respondents said promoting rehabilitation of existing housing stock is a priority.



“Definitely prioritize redeveloping what we already have before building more and reducing our green space.”

There is very little vacant land in Upper Dublin left for development. Residents have strongly indicated that while additional housing units may be needed, they cannot be developed at the expense of remaining natural ecosystems and open spaces in the Township. Maintaining the existing housing stock is a key part of diverting new development from these areas.

²⁴ ESRI Community Analyst.

Perceptions that the permitting process is difficult may serve as an impediment for residents who wish to renovate or repair their homes.

23% of survey respondents indicated it should be a priority to provide education around permitting processes for renovations, additions, etc. Some of the challenges stem from the number of nonconforming lots, setbacks, etc. that require homeowners to seek a variance for relatively minor renovations (e.g., a new deck). Upper Dublin will be updating its zoning ordinance following the adoption of UD Plan and one of the primary objectives of the update is to reduce the number of nonconformities by right sizing the zoning dimensional regulations.



60% of survey respondents said creating more efficient permitting process for renovations, additions, etc. is a priority.



“Since we can’t afford to move to a larger home, it would be great to be able to add an ADU or addition. But neighbors who have gone that route tell us that the Township makes it so difficult and expensive that it’s barely even worth it.”

Why is this important?

- Varied housing types can cater to households with different housing needs, preferences, and life stages, and support sustainable development by promoting efficient land use and reducing urban sprawl, which can lead to more walkable neighborhoods. Increasing the variation in housing options can also address affordability issues by offering housing at a variety of price points due to varied type and form.
- Nearby communities have higher shares of multi-family housing options like duplexes and townhouses. If Upper Dublin does not increase the availability of these options people may be forced to move to other areas for housing that meets their needs.
- Developing new housing options can alleviate tight owner and rental markets.
- There is very little vacant land left for development in Upper Dublin. Supporting maintenance of the existing housing stock and prioritizing redevelopment over development in open space and natural lands are key to preserving vacant land for other uses.
- Addressing challenges in residential permitting processes will allow people to stay in their homes or within the Township as their needs change. It can also attract prospective residents who know they will be able to make changes to a home on the market to better meet their needs if necessary.



How can we move forward?

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

Upper Dublin should adopt a form-based-leaning zoning ordinance to allow for a greater variety of housing options available across neighborhoods in the Township. While traditional zoning codes focus first on the use of land, form-based codes prioritize the form of buildings, based on the belief that the form is more important than the use in determining community character.²⁵

The code must be geared toward meeting the variety of household needs found across Upper Dublin – affordability, aging in place, different homes sizes, and “missing middle” housing types.

Specific terms in the existing zoning code to review are:

- Geographic boundaries of residential zoning districts.
- Allowable residential types in residential zoning districts.
- Regulations for minimum lot area, height allowances, setback requirements, parking minimums, etc.
- Regulations for Accessory Structures for Dwelling purposes (i.e., Accessory Dwelling Units).
- Consider single-family home conversions to duplexes, triplexes, or quadplexes.
- Duplexes permitted by-right in single-family residential districts.

This action will also help “right-size” the regulations for zoning districts to address the large number of nonconforming lots and structures in the Township.

Following the adoption of UD Plan, Upper Dublin Township will be pursuing an update to the zoning ordinance (this project has already been funded). The Community Planning and Zoning Department should lead efforts to develop the update to the ordinance that incorporates form-based principles to retain community character. This should be done in coordination with Township boards and departments, including the Planning Commission, the Historical Commission, the Environmental Protection Advisory Board, the Shade Tree Commission, the Zoning Hearing Board, the Parks and Recreation Department, and the Code Enforcement Department.

After preparing a draft zoning code and draft zoning map, the Community Planning and Zoning Department should present recommendations to the Board of Commissioners and begin a public comment period. The Department will coordinate with the Board of Commissioners, and other Township boards and departments as applicable to update, approve, and adopt the code.

Elements of a Form-Based Zoning Code

- A plan of the regulated area designating the locations where different building form standards apply.
- Specifies elements in the public realm, such as sidewalks, on-street parking, street trees, etc.
- Building standards controlling the feature, configurations, and functions of buildings.
- A clearly defined and streamlined application and review process.
- Landscaping and environmental standards.

²⁵ [Planetizen. \(2024\) What is a Form-Based Code?](#)

One of the purposes of a zoning ordinance update is to encourage the development of housing to meet AN Goal 2. Should the updated zoning ordinance pose challenges to the development of housing, the Board of Commissioners can amend the zoning ordinance.

Milestones

- Review existing zoning code and identify areas that could be improved through a form-based code.
- Develop a draft zoning map and updated code requirements and guidelines.
- Deliver the draft zoning code and map to Township Boards and Departments for review and comment. Address comments as applicable.
- Present draft map and zoning code to the Board of Commissioners for approval.
- Once approved and adopted, these updated documents would become official land use and form regulations in the Township.

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

Upper Dublin can provide incentives to encourage greater variety in housing types and price points in residential development proposals. Proposals for any type of housing development can qualify for incentives. Incentives can include density or height bonuses, reduction of parking minimums, property tax abatements, and reduced permitting fees or expedited permitting.

The Community Planning and Zoning Department should develop a policy that defines possible incentives and qualifying requirements for missing middle housing developments. This should:

- Define missing middle housing options and affordability parameters.
- List available incentives, detailing to what extent they can be utilized in different development scenarios. Incentives might include parking reductions or density bonuses. The Township can consult with developers to see what would be most appealing. Additionally, Upper Dublin can seek out developers to develop Township-owned property into missing middle housing.
- List how developments can qualify for a missing middle or affordability incentive.
 - Consider what must be required of single lot infill development versus larger scale developments.
 - What number or percentage of units must meet missing middle and affordability requirements for a development to qualify?
- Detail process required to apply for incentives.

This policy should be developed in coordination with the Planning Commission, the Zoning Hearing Board, and the Code Enforcement Department. The Community Planning and Zoning Department should also

engage with developers and Township residents to determine what incentives will be attractive to developers and acceptable to residents.

The Community Planning and Zoning Department would then present the draft policy to the Board of Commissioners and follow the established process to open a public comment period, revise the policy as necessary, and submit the policy to the Board for final approval and adoption.

Once adopted, the policy will become official guidelines on missing middle housing incentives in the Township. These would be administered by the Community Planning and Zoning Department and the Code Enforcement Department.

Action AN 2.C: Connect residents to a funding program to support housing maintenance and repairs.

The Code Enforcement and Planning and Zoning departments can help share information about existing programs (e.g., Whole Home Repairs) that support homeowners with fixed or moderate incomes with maintenance and repairs by having this information readily available on the Township website and sharing this information in the case of code violations. Additionally, the Township could explore a low-cost loan assistance program for owners of Historic Properties, on the Township’s Historic Properties Inventory, to assist with maintenance. Assistance in maintaining Historic Properties will help reduce the loss of historic resources in the Township from burdensome costs, mandated repairs, and fines.

Milestones

- Engage with Township boards and departments, housing developers, and residents on potential housing incentives.
- Develop a missing middle housing incentive policy.
- Present policy to the Board of Commissioners for approval.
- Once approved and adopted, advertise the policy and implement internal processes to administer the program.

Milestones

- Conduct research and compile information regarding housing maintenance and repair programs and resources.
- Develop educational materials and distribute them through in-person and virtual communications channels.
- Connect residents to resources as they work with the Township on permitting requests and code violations.
- Explore potential for a low-cost loan assistance program for historic property maintenance. Report findings to the Board of Commissioners with recommendations for next steps.

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

Upper Dublin’s historic resources not only represent the Township’s long and significant history but also create a sense of place and community character throughout the Township. In historic preservation, we often see structures adapting to their times through changes in use. Upper Dublin’s historic resources can be leveraged as a tool in creating a variety of housing types to meet the needs of the communities: by maintaining existing properties, avoiding demolition, and permitting adaptive reuse of historic homes (i.e., permissions for home occupation, bed and breakfasts, and conversion to multi-family). The Township should review the existing Historic Ordinance.²⁶ The review should consider, but is not limited to:

- How Historic Resources can be protected and adaptively reused. Historical Resources in the Township are permitted to have some business uses currently. These permissions can be evaluated and expanded. Many of the Historic Resources in the Township have more land or are located on regularly traveled roads which allows accessibility and parking.
- Streamlining the process for residents who require emergency repairs due to natural disasters or fire. This precedent was established after the tornado in 2021, and recently cited as a way for immediately allowing repairs to an addition to a historic damaged by fire where no changes are being made to the historic resource This informal agreement should be formalized in the Ordinance.

The Township should also work with the State Historic Preservation Office (SHPO) to ensure that all historic resources are being tracked in PA-SHARE, Pennsylvania’s Historic and Archaeological Resource Exchange, and identify resources eligible for potential funding sources for historic preservation.

Milestones

- Review and update the existing Historic Ordinance while developing a form-based code in Action AN 2.A.
- Ensure historic resources in the Township are tracked in PA-SHARE.
- Work with the SHPO to identify potential funding opportunities to support historic preservation for specific resources.

²⁶ [Upper Dublin Township. \(2006\) Chapter 127 Historic Preservation.](#)



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

The Township should convene a working group of staff and relevant stakeholders to identify the existing challenges in the permitting process and propose solutions on how to create a more efficient process that accomplishes the goals of limiting barriers to development or renovations and protecting the public health, safety, and welfare of the Township’s residents.

Milestones

- Convene permitting process review working group.
- Define working group objectives and develop schedule of work.
- Facilitate discussions on existing challenges and potential solutions.
- Develop a memorandum with recommendations on changes to permitting processes.
- Present findings to the Board of Commissioners for approval and adoption of recommendations.

Action AN 2.F: Education on permitting processes.

The Township should prepare a one-page document that explains the permitting process and reasons behind specific requirements and timelines. This document should be presented to the permit working group for feedback. This group should consider if the document includes all necessary information and if the wording and formatting is accessible to all residents. Once finalized, post the document on the Township website.

Milestones

- Develop educational materials detailing permitting processes.
- Present materials to the permitting process review working group for feedback.
- Revise materials as needed.
- Post the document on the Township website.

VIBRANT & CONNECTED COMMUNITY SPACES

Introduction

Vibrant and Connected Community Spaces (CC) details planning for services and amenities in proximity to where residents live while mitigating the transportation and environmental impacts of increased commercial and mixed-use development. The services and amenities will meet the needs and desires of existing residents, while contributing to the fiscal sustainability of the Township’s tax base.

Goals to achieve vibrant and connected community spaces in Upper Dublin are:

Vibrant and Connected Community Spaces (CC) Goal 1: [Cultivate neighborhood hubs.](#)

Vibrant and Connected Community Spaces (CC) Goal 2: [Invest in community-serving commercial and mixed-use districts.](#)

Vibrant and Connected Community Spaces (CC) Goal 3: [Support and encourage local businesses.](#)



Consistency with Montco 2040

The goals and associated key actions in the Vibrant and Connected Community Spaces Focus Area are consistent with the following goals in Montco 2040:

Connected Communities

- Improve transportation quality and expand options for county residents and workers.
- Support strong downtowns and community destinations, including mixed use areas, arts and culture focal points, libraries, and other gathering places.

Sustainable Places

- Provide more opportunities for residents to exercise and have healthy lifestyles.
- Enhance community character and protect neighborhoods.
- Support housing choices and opportunities to meet the needs of all people.

Vibrant Communities

- Improve transportation access to businesses.
- Encourage development and transformative investment where infrastructure already exists.
- Attract and retain businesses and vital community assets.
- Flexibly adapt to changing market conditions and demographics.

CC Goal 1: Cultivate neighborhood hubs.

What do we mean?

Neighborhood hubs come in different forms:



Low-Impact Neighborhood Commercial Spaces

These commercial spaces have small footprints and do not generate a significant amount of traffic or noise. They have limited hours that are respectful of surrounding residential areas.

Examples include a small coffee shop, bakery, florist, bookstore, dry cleaner, etc.



Parks and Recreation Areas

Parks, playgrounds, and recreational fields. These areas can have active (fields, equipment, etc.) or passive (walking trails, benches, etc.) recreational uses and have programming some of the time or none of the time.



Civic, Community, and Educational Spaces

Civic and educational spaces include libraries, community centers, schools, and municipal buildings. These spaces host community events and meetings, and can also provide services.

Neighborhood hubs provide spaces for people to gather, socialize, relax, and enjoy activities. These spaces are sometimes referred to as “third spaces” (first spaces being the home and second spaces being workplaces). Neighborhood hubs play a key role in building community understanding, providing amenities (recreational, educational, environmental, retail, and otherwise), and creating a high-quality of life for residents.

What do we know?

Existing residents are interested in small, low-impact, neighborhood-serving retail in residential areas; this will also help attract new households to the area.

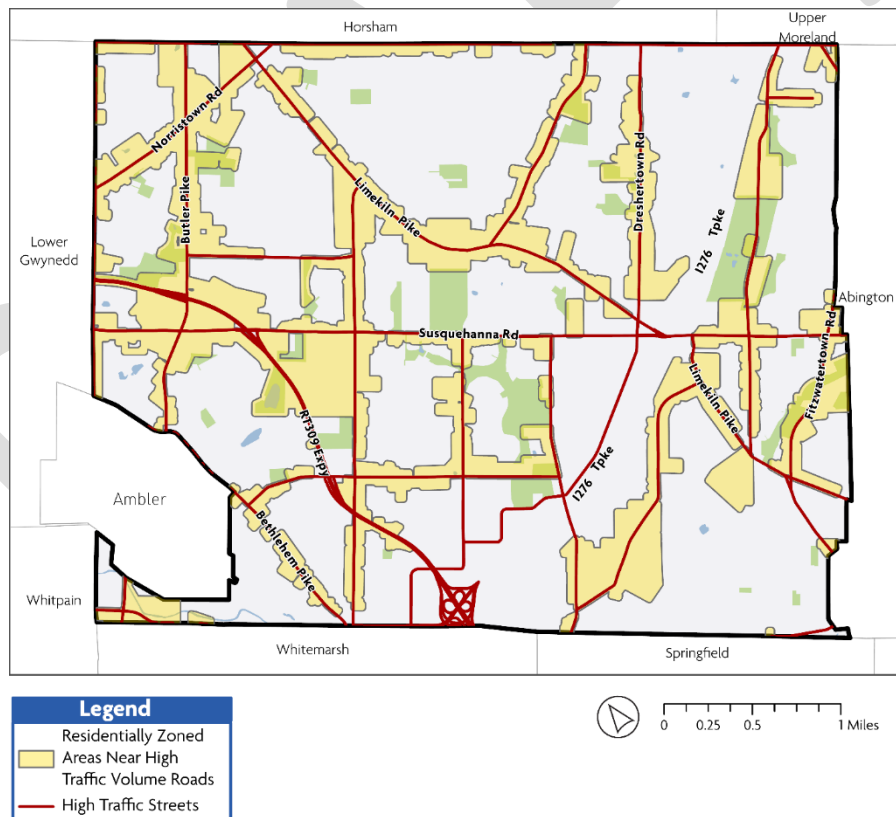
Allowing small, low-impact, neighborhood-serving retail in residential areas was the second highest development priority from survey respondents (52% of respondents selected it as a priority). This is directly connected to the desire of residents for a more walkable and bikeable community. If amenities and services are located within closer proximity to where people live, it makes those places easier to access without a car.

Upper Dublin residents are not unique in wanting this type of use in their residential neighborhoods. 56% of millennial and 46% of baby boomers prefer to live in more walkable, mixed-use neighborhoods.²⁷ Upper Dublin’s population is aging. To attract new residents, including young professionals and young families with children, it will be important to create neighborhoods with characteristics that make them mixed-use and walkable.

69% of Upper Dublin is zoned for single-use residential neighborhoods and some of these neighborhoods are located along high-traffic Township corridors.

Upper Dublin Township developed from an agricultural area with residential settlements to a suburban, residential area following World War II. Upper Dublin remains a commuter suburb with a large amount of residential land use and pockets of commercial and office uses. Single-use neighborhoods were typical in the development patterns of the late 20th century into the early 21st century; however, as noted above, there is a desire for more mixed-use neighborhoods. There are areas of the Township zoned for residential uses along high-traffic corridors; these areas could accommodate small, low-impact neighborhood-serving retail uses since they are along major corridors and the edges of the residential areas (Figure 19).


Figure 19: Residentially Zoned Areas Near High Traffic Volume Roads



²⁷ [Regional Plan Association. \(2016\) The Unintended Consequences of Housing Finance.](#)

Parks and recreation spaces are treasured assets in the community. Providing safe access to within a 10-minute walk of every Township resident is a priority that emerged in the Upper Dublin Open Space Plan.²⁸


In 2023, the Township adopted the Upper Dublin Township Open Space Plan which updated the 2005 Open Space and Environmental Resource Protection Plan. The Plan focused on park and recreation amenities and facilities, open space and natural resources, and community connectivity. The Plan’s survey found that 89% of respondents visited a Township park within the last year and 31% of them visited several days a week. Throughout the UD Plan process, community members expressed their gratitude for and enjoyment of the community’s park system. UDT parks are, without a doubt, important neighborhood hubs. Knowing this, the Open Space Plan includes a goal to “Provide safe access to at least one park for active or passive recreation within a 10-minute walk of every Township residence.”



90% of survey respondents said they were very or somewhat satisfied with parks, trails, and recreational facilities.

The community values the UD School District, UD Library, and North Hills Community Center.

Beyond the parks and recreation spaces, residents value the school district’s facilities, the UD Library, and the North Hills Community Center as community spaces. The UD Library is a Township-wide hub, whereas the North Hills Community Center primarily serves the surrounding neighborhood. While there are many community hubs within Upper Dublin, many are not safely accessible without a vehicle. The 2023 Upper Dublin Township Open Space Plan map highlights the 70 missing connections (i.e., sidewalk connections, trail connections, bike lane connections, crosswalks, pedestrian tunnel, and pedestrian bridge) within the Township.²⁹ The Open Space Plan explains that community members felt that the missing connections should be prioritized by a connection to a park or open space, a connection to a local trail, and a connection to a regional trail and community amenity.



North Hills residents shared the importance of the North Hills Community Center as a community hub throughout the decades. Many residents would like to see the property recognized as a historic building.



51% of survey respondents said connecting neighborhoods to transit, parks/trails, and other amenities is a priority.

²⁸ [Upper Dublin Township. \(2023\) Upper Dublin Township Open Space Plan.](#)

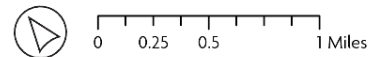
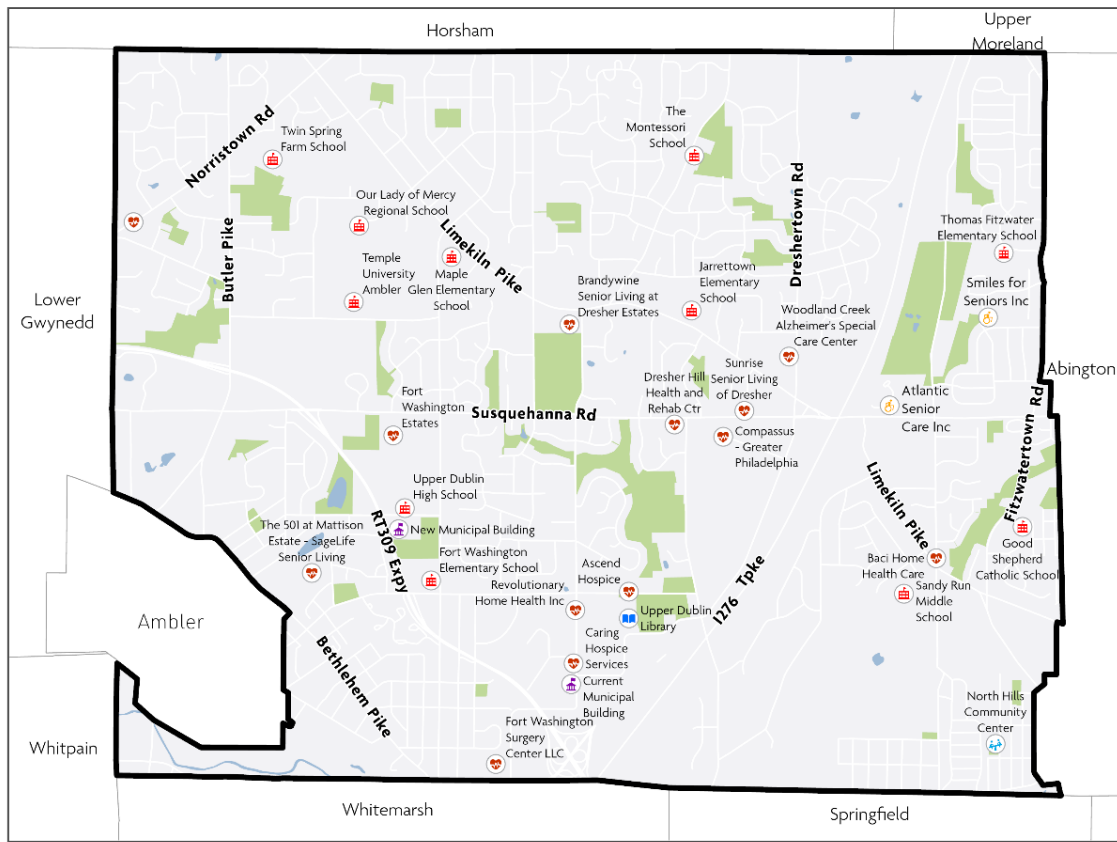
²⁹ [Upper Dublin Township. \(2023\) Open Space Plan Map.](#)

The new Township Municipal Building is being designed to provide a civic presence and improved community access.

In September 2021, Hurricane Ida left a path of devastation across the Township. The storm claimed one life and generated millions of dollars in damages to more than 1,500 public, private, and institutional properties, including the Upper Dublin Township Building. Due to the damage, the Township relocated its municipal operations and is in the process of rebuilding the new Township building. The new Township building’s design aims to create a civic presence and provide improved community access to services. It is imagined that the new Township building, especially due to its proximity to the Upper Dublin High School, Fort Washington Elementary School, and Loch Alsh fields, has the potential to contribute to a vibrant community space.

Figure 20: Existing Community Hubs

Source: MCPC and DVRPC (2024)



Why is this important?

- By cultivating new neighborhoods hubs and improving access to existing hubs, Upper Dublin builds, attracts, and retains community.
- Additional small retail spaces provide economic opportunity for small businesses and entrepreneurs and help to increase the tax base.
- Providing amenities and services within proximity to neighborhoods reduces dependency on vehicle for travel within the Township, reducing carbon emissions and traffic congestion, and increasing access. By investing in sidewalk connectivity near these amenities, it increases safety and access to these amenities by walking or biking.

How can we move forward?

Action CC 1.A: Permit small, low-impact, neighborhood-serving retail uses in portions of residential districts along main corridors.

Most of Upper Dublin was developed as single-use neighborhoods: residential areas, commercial areas, and industrial/office areas are kept separate. This is a result of Euclidean zoning and planning practices in the post-World War II era. While transitioning to mixed-use neighborhoods and development patterns aligns with sustainability and market trends, we know that many residents treasure their residential neighborhoods for what they are today. As such, this action aims to introduce mixed-use opportunities into residential areas in a targeted, limited manner to accomplish the goals of maintaining the existing character of the neighborhood while responding to the desire to create more neighborhood hubs and support local business.

During the zoning ordinance and map update, Upper Dublin should consider creating a “Neighborhood Corridor District” that permits small, low-impact retail on the ground floor of residential structures. The district could include all residentially zoned properties that abut a major corridor in the Township. The Future Land Use Map’s “Residential Transition” place type illustrates this concept in more detail. When the ordinance and map are being updated, a parcel-by-parcel analysis should be conducted along the corridor to determine the appropriate district boundaries. Parking placement, building form, impact on neighboring houses, and circulation will be considered in developing regulations for the district.

Action CC. 1.B: Develop a neighborhood placemaking grant to encourage and fund beautification, streetscaping, and community building in neighborhoods and around community amenities.

In addition to physical pedestrian infrastructure upgrades, neighborhood hubs can be strengthened through placemaking. Placemaking brings together community members to create and implement a vision for the public realm. It helps strengthen community connections among people and place. Neighborhood groups

Milestones

- Define boundaries of the Neighborhood Corridor District.
- Determine permitted uses, conditional uses, and nonpermitted uses for the District.
- Incorporate the District and use permissions into the zoning ordinance and map update.

could submit placemaking proposals that could fund neighborhood visioning and branding, streetlight banners, streetscaping upgrades (tree planting, vegetation, benches, etc.), community murals, and more.

The Township could convene institutional and non-profit partners, and representatives of the Shade Tree Commission, Planning Commission, Historic Commission, and Board of Commissioners to discuss establishment of a placemaking grant fund or strategies for utilizing existing grants through the Pennsylvania Council on the Arts or other funders. This committee could also help establish application criteria, such as: matching support/in-kind donation requirement; support letters; a line item budget; rationale behind proposed plan explaining what the placemaking approach aims to accomplish and what challenge it will be addressing; and a maintenance plan.

A good example of placemaking that has been implemented in Upper Dublin is the Fort Washington Village/Elliger Park street signs. These signs create a sense of place in the neighborhood and references the historic character of the area.

Milestones

- Convene institutional and non-profit partners and Township boards and commissions to discuss establishment of a placemaking grant fund or strategies for utilizing existing grants.
- Establish application criteria.
- Establish process for application review and ensure compliance with existing codes.

Placemaking Example

The Pennsylvania Council on the Arts has the Creative Communities Initiative (CCI) that provides multi-year funding for place-based, community-driven, arts-based projects that serve as catalysts for social cohesion, livability, and community and economic development. Grants have been awarded to collectives of organizations, municipalities, and institutions that work together to propose a placemaking project or program. One example is the Creative Spaces Collective program in Indiana, Pennsylvania, that brought together a university, municipality, and other organizations to work on public art projects and community programming.



Action CC 1.C: Invest in upgrades to North Hills Community Center and celebrate its historic and cultural significance.

The North Hills Community Center is a pillar in the North Hills neighborhood community. It provides recreational, educational, and social amenities to the residents in the neighborhood. The community center needs upgrades to address basic maintenance concerns and to bring it into the 21st century. The Township should consider allocation of additional funds in the Parks and Recreation budget to address maintenance concerns in the short-term and then work with the community, including organizations like the North Hills Collective, to identify additional needs.

Additionally, community members expressed interest in exploring a historic designation, at the state level, or in the Upper Dublin historic resources inventory to recognize the historic and cultural importance of the center and preserve it for years to come. It should be noted that 212 Girard Avenue, the North Hills Community Center, is already in the Upper Dublin Township historic resources inventory as a Class II resource. Class II resources are deemed historically or architecturally significant at the local level. Many community members may not be aware that the North Hills Community Center already has a Class II designation and recognition in the historic resources inventory. The Historic Commission should consider working with the North Hills Community to host a community conversation series that discusses the designation and what it means for future preservation. Part of the historic preservation effort for the North Hills Community Center could be commemorative and educational, such as recording oral histories about the Center, hosting panel discussions, or holding a community-wide event in honor of the history of the building and community that uses it. Recently, the Upper Dublin Historical Commission celebrated “elder trees” in the Township through a program that involved the UD School District, Robbins Park, UD Library, UD Shade Tree Commission, Temple-Ambler, and the wider community. A similar initiative could be organized to celebrate the North Hills Community Center.

Milestones

- Discuss immediate maintenance needs and future needs with North Hills residents and organization partners.
- Allocate capital budget to maintenance and improvements.
- Once the budget is approved, share the capital improvement plans with the North Hills community.
- Host a discussion in North Hills with the Historic Commission.

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.

The 2023 Open Space Plan identifies properties of interest for acquisition, access easement, or conservation easement to further access to and protection of open space. Some of the properties of interest are located outside of the existing 10-minute walksheds of parks, meaning that they could serve residences that currently do not have access to a park within 10-minutes. This directly supports implementation of the Open Space Plan OP&NR Objective 2.2 to “Acquire properties, conservation easements and access easements, to complete Missing Connections and project Properties of interest.”³⁰

Action CC 1.E: Continue investing in the Upper Dublin Township Library as a community hub.

The Upper Dublin Township Library is designed to be a community gathering space, with resources, meeting rooms, an auditorium, and outside space that can accommodate small and large groups. Community members gather at the library in informal ways, but also through organized events. The Upper Dublin Township Library should continue to serve as a community hub that can host community events such as concerts and cultural events, and serve as a community “third” space (i.e., a space that is not someone’s workplace or home) for gathering within the library building or outside.

Milestones

- Reference Appendix C of the Open Space Plan for the Properties of Interest Prioritization and Prioritization Worksheet.
- Acquire properties, conservation easements, and access easements to protect the identified Properties of Interest.
- Evaluate the prioritization list following acquisition of a property of interest to determine impact (if any) on prioritization of remaining properties.

Milestones

- Continue to convene community events in the library’s indoor and outdoor spaces.
- Pilot new events to garner community interest (e.g., food trucks).
- Explore ways to enhance the library’s outdoor space.

³⁰ [Upper Dublin Township. \(2023\) Upper Dublin Township Open Space Plan.](#)

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

What do we mean?

This goal looks at how the Township can enhance existing commercial districts (i.e., the shopping centers) and create mixed-use districts in underutilized areas of the Township to diversify and strengthen the tax base and meet the needs of existing and future residents.

“I do not want any of the current open space to be developed; however, there is a lot of space in the Ft. Washington business park that is already developed but underused. It should be reused to expand mixed-use developments.”

What do we know?

Upper Dublin has three commercial districts and one mixed-use district.

There are five shopping centers in Upper Dublin Township containing over 442,661 square feet of retail shopping center space.³¹ Specifically, there are four existing neighborhood shopping centers (Dreshertown Plaza Shopping Center, Fairway Shopping Center, Maple Glen Shopping Center, and Upper Dublin Shopping Center) and one recently completed community shopping center (the Promenade at Upper Dublin). Neighborhood shopping centers are between 30,000 and 150,000 square feet and feature supermarkets and small tenants. Community shopping centers are between 100,000 and 350,000 square feet and feature larger tenants.

“A downtown does not exist in Upper Dublin. We need a vibrant, unique main street that attracts small businesses.”



Photo Credit: 4Ward Planning, Real Estate and Market Analysis for Upper Dublin Township Comprehensive Plan

The ages of the Dreshertown Plaza, and Fairway, Maple Glen, and Upper Dublin Shopping Centers (47, 69, 55, and 62 years, respectively) suggest the sites could be near-term redevelopment candidates, whereby housing (e.g., multi-family units) is created as part of an entire shopping center site redevelopment including anchor grocers, restaurants, and personal service shops.

³¹ [MCPC. \(2015\) Shopping Center Inventory Montgomery County, Pennsylvania.](#)

It is important to note that there is a concentration of retail to the east of the Township. Additionally, residents expressed that they did not want to see Upper Dublin becoming a regional retail destination, instead preferring to see more “everyday” retail (food stores, dry cleaners, hardware stores, etc.) options and restaurants to serve Township residents. Retail redevelopment or development of the neighborhood shopping centers should remain a similar scale or not exceed a community shopping center scale.




Community members also expressed an interest in more retail options within the Township saying that they would visit commercial areas in UDT more often if there were more restaurants, and more “everyday” retail.

There is a demand for retail.

Montgomery County is a major retail hub within the region with low availability rates and high asking retail rents (\$21.13 per square foot compared to \$19.32 per square foot in the larger Philadelphia Metropolitan Statistical Area). There is also little new retail space coming on the market in Montgomery County. This suggests that the County’s retail market is strong in terms of occupancy and demand, as well as retail occupancy and demand.

The market conditions and regulatory environment is ripe for transforming Greater Fort Washington District into a mixed-use district.

A new zoning ordinance and design guidelines for the Fort Washington Office Park were enacted by the Upper Dublin Township Commissioners in May 2019. The Greater Fort Washington (GFW) zoning district allows new mixed-use and multifamily housing development, to create a new Live – Work – Play environment according to the latest Smart Growth planning principles and practices. The passage of this new zoning follows extensive planning, forecasting and deliberation by the Upper Dublin Township Commissioners, Planning Commission and staff; and supports the ongoing Office Park revitalization program being managed by the Upper Dublin Township Municipal Authority.



Revitalizing the GFW District as a mixed-use district was the third highest development priority in the survey. 32% of respondents identified it as a priority.

The GFW ordinances respond directly to what we know about the area:

- The GFW District has ample space for growth and has great access to the Turnpike and public transportation. The space and location provide opportunities for a mix of uses, such as commercial, office, light industrial, residential apartments, recreation, and transportation to create a live-work-play environment.
- There is currently 439,000 square feet of Class A office space available to lease at the Township’s Fort Washington Office Park. As of spring 2024, there is a 14% office vacancy rate in the park. The

Fort Washington/Plymouth Meeting/Blue Bell office submarket had the highest overall office vacancy (26.8%) of all of the submarkets in the suburban Philadelphia office market suggesting there is a relatively high oversupply of available office space. It is unlikely that vacancy rates will decrease to pre-COVID-19 pandemic levels. Now is the time to reimagine the office park.

- Flexible scheduling and telework have decreased the number of employees in the office park and other areas of the Township each day, which reduces demand for parking. There are options to reuse existing parking lots in the Township for other desired land uses.
- A portion of the GFW District is within the floodplain (Figure 21). Any development within the floodplain needs to have a net improvement to stormwater management. The Montgomery County Hazard Mitigation Plan (2022) identified the Fort Washington Business Park as one of the areas with the highest cumulative climate change risk based on vulnerability to flood, precipitation, and heat.³² In redevelopment of the GFW District, there is opportunity to integrate green infrastructure and building technologies into the site and building designs.

In addition to the GFW District zoning regulations and GFW design standards in the Subdivision and Land Development Ordinance (SALDO) which establish a regulatory framework, there is a coordination structure in place for furthering projects, which the Municipal Authority facilitates. The Upper Dublin Township Commissioners authorized the formation of the Municipal Authority in September 2016 to manage the GFW improvement program. They are currently working on the following improvement projects:³³

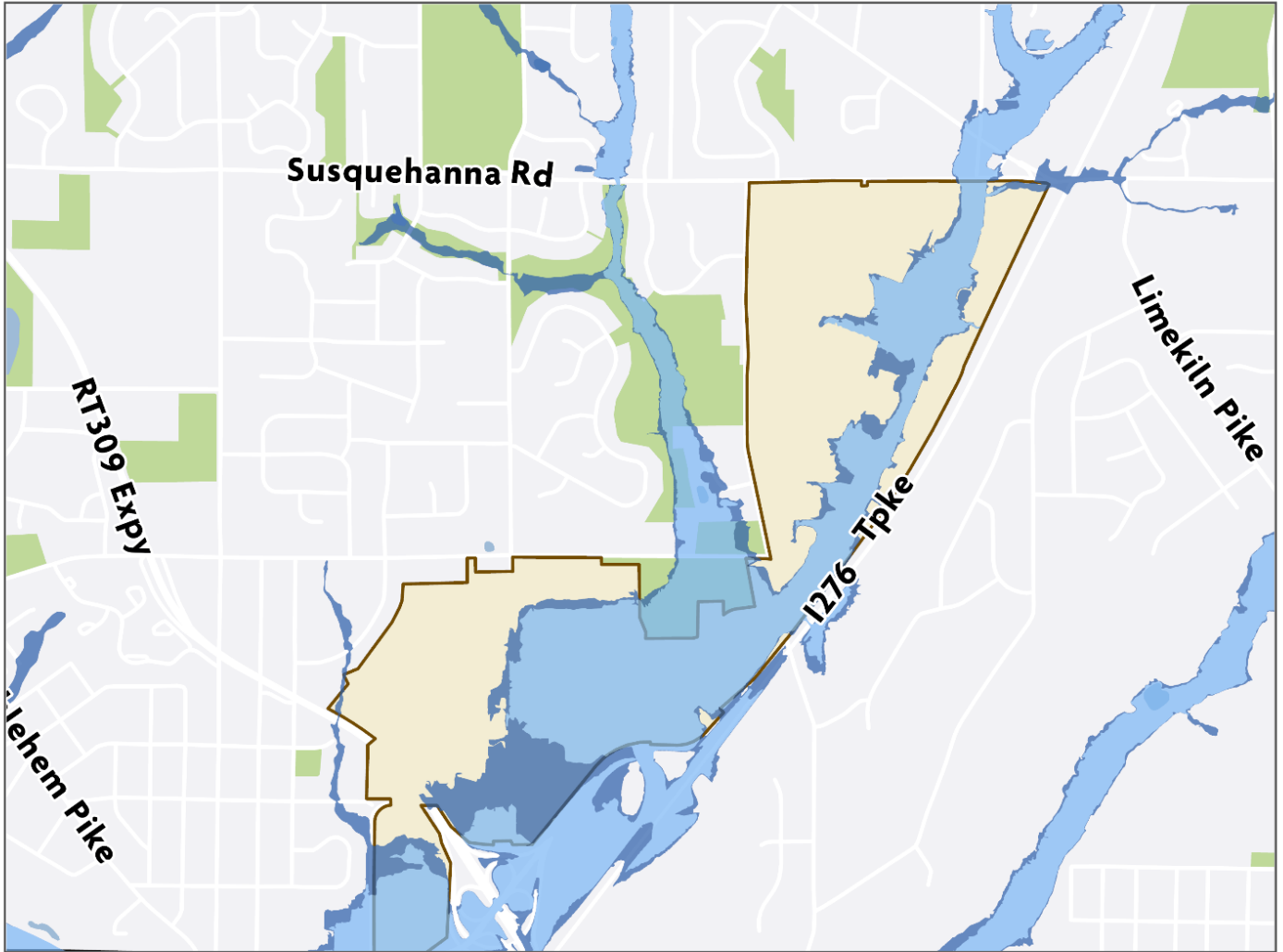
- **Fort Washington Cross County Trail and Road Diet:** The Fort Washington Cross County Trail & Road Diet is a \$37 Million investment by Upper Dublin Township and Municipal Authority which has included \$25 Million in grants and other funding sources to install a 3.0-mile regional Circuit Trail, reconstruct roads, and improve access and drainage within the district.
- **Fort Washington Zip Ramp:** Right of Way has been acquired and final coordination is being completed with the PA Turnpike Commission to construct the new off-ramp from the Fort Washington PA Turnpike interchange directly to Commerce Drive. The ramp will become the fourth approach at the recently constructed traffic signal on Commerce Drive. Project Estimate is \$3.0 Million with funding by the Municipal Authority, a Montgomery County grant, a PA DCED grant and a Land Development contribution.
- **Dreshertown Road Improvement Project:** This includes the widening of Virginia Drive and Dreshertown Road, the extension of the Cross County Trail, culvert replacement, and the addition of missing sidewalks.

³² [Montgomery County. \(2022\) Hazard Mitigation Plan.](#)

³³ [Upper Dublin Township. \(2024\) Municipal Authority Projects.](#)

Figure 21: Floodplain in the Greater Fort Washington District (Fort Washington Office Park Area)

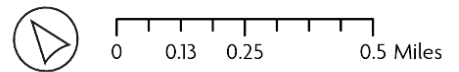
Source: FEMA and Montgomery County GIS (2024)



Legend

Chance of Severe Flooding

- 1% annual chance
- .2% annual chance
- Fort Washington Office Park



Pennsylvania Avenue needs to balance competing land use and transportation impacts.

The western portion of Pennsylvania Avenue, near the Turnpike exit, could serve as a gateway to the Township; however, the area is impacted by a few competing factors:

- The portion of Pennsylvania Avenue currently operates as a thoroughfare. The volume and speed of cars makes it a dangerous and unenjoyable pedestrian area.
- The western side of Pennsylvania Avenue is owned by Whitmarsh Township; Upper Dublin does not have any regulatory authority on that side of the road. The Whitmarsh Township side of Pennsylvania Avenue is primarily auto-oriented retail and the Fort Washington Train Station.
- On the eastern side of Pennsylvania Avenue (the Upper Dublin side), there is a mix of restaurant, office, and retail. Beyond the parcels facing on Pennsylvania Avenue is the Fort Washington Village residential neighborhood. There is a desire from residents in the neighborhood to provide adequate buffering between any non-residential uses or higher density residential uses on Pennsylvania Avenue and the residential neighborhood.

There are concerns about the impact of development and redevelopment on environmental features and infrastructure.

With any redevelopment or development, there will be changes to the existing traffic patterns and surrounding environment, which is why Township land development regulations require that applicants submit plans that show how environmentally sensitive features will be protected, stormwater will be managed, and traffic impacts will be mitigated. It will be important when redeveloping the Greater Fort Washington District into a mixed-use district and the commercial districts into more walkable areas that the impact of redevelopment on the infrastructure is considered. In the case of the Greater Fort Washington District, the GFW ordinance requires that any development within the floodplain needs to have a net improvement to stormwater management. To address traffic in the district, a transportation demand management (TDM) plan for the office park was written in 2017 in anticipation of the modernization of the office park into a mixed-use center.³⁴ The Center for Urban Transportation Research explains that “TDM focuses on helping people change their travel behavior—to meet their travel needs by using different modes, traveling at different times, making fewer trips or shorter trips, or taking different routes.” The Fort Washington TDM plan proposes recommendations for the Township, employers, and property owners. The strategies for the Township are incorporated into UD plan actions (pedestrian network improvements, bike network improvements and amenities, branding and signage, mixed-use development, compact communities, parking management, etc.). TDM is especially important when considering development or redevelopment near corridors with higher traffic counts (Figure 22).

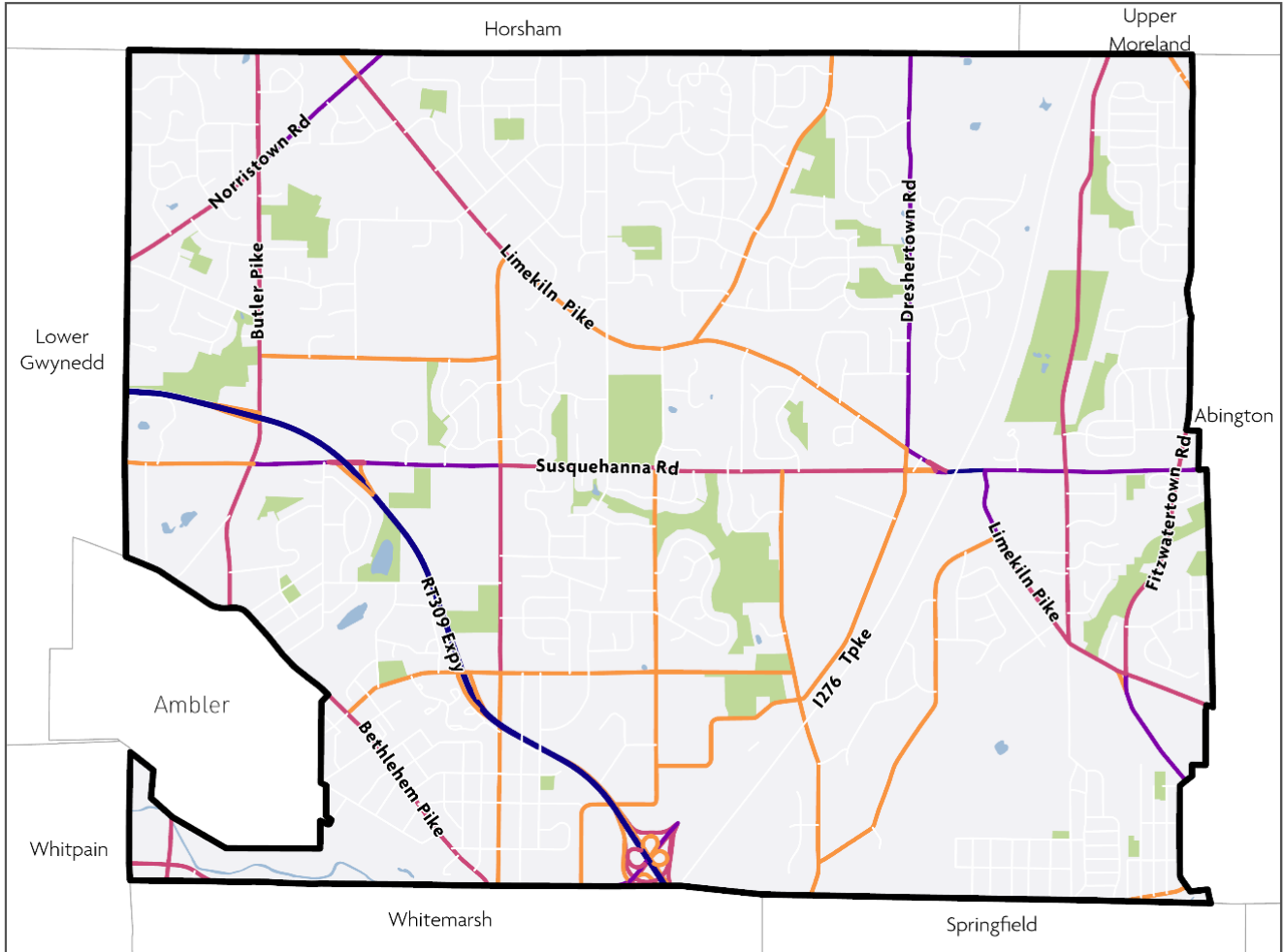


Residents expressed concern about overdevelopment in the Township (i.e., developing on green space, increasing density of areas in a redevelopment, etc.) due to environmental and transportation infrastructure concerns.

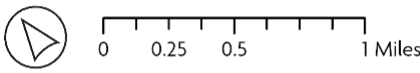
³⁴ [Upper Dublin Township. \(2017\) Fort Washington Office Park Transportation Demand Management Plan.](#)

Figure 22: Annual Average Daily Traffic Count

Source: PennDOT (2023)



Legend	
Base Annual Average Daily Traffic	
—	0 - 1,886
—	1,887 - 5,766
—	5,767 - 9,944
—	9,945 - 15,033
—	15,034 - 34,453



Why is this important?

Investing in community-serving commercial and mixed-use districts is important because:

- Development of commercial spaces will help build the tax base and reduce tax burden on residents.
- The existing neighborhood shopping centers are aging, but they continue to serve the community. Reinvestment in these areas will ensure that residents continue to have access to amenities within proximity to their residences.
- Creating more walkable commercial districts and mixed-use districts will attract younger generations who seek out walkable, mixed-use neighborhoods. It also helps reduce dependency on personal vehicles.
- Thriving commercial and mixed-use districts provide job opportunities.
- Mixed-use districts can accommodate a variety of housing unit types to meet the needs of residents.

How can we move forward?

Action CC 2.A: Develop focused and phased improvement plans for neighborhood shopping centers.

Phase 0: Review existing zoning overlays and design standards. Update zoning regulations and design standards to include right-size parking strategies, building placement (reduced setbacks, parking in the rear of the building), building design (height, frontages, etc.) signage, lighting, paving, and landscaping to support walkability and sense of place. Updates should consider appropriate buffers between commercial districts and surrounding residential districts. While there is an existing overlay for Dresher and Maple Glen, there is no overlay for the other two shopping centers. This phase should examine the potential for an overlay in the Fairway Shopping Center and Upper Dublin Shopping Center area or update base zoning.

Phase I: Install sidewalks to connect commercial districts with surrounding residential neighborhoods. Using the Open Space Plan Missing Connections Map, prioritize sidewalk installation that will provide increased connectivity to the commercial districts.

Phase II: Invest in streetscaping and beautification around the commercial areas to create a sense of place. Efforts can include vegetation, tree planting, branded signage for the commercial district, improved lighting, benches, bicycle racks, and more.

Phase III: Work with property owners to incentivize façade upgrades. Integrate public art into the upgrades.

Milestones

- Phase 0: Review existing zoning overlays and design standards.
- Phase I: Install sidewalks to connect commercial districts with surrounding residential neighborhoods.
- Phase II: Invest in streetscaping and beautification around the commercial areas to create a sense of place.
- Phase III: Work with property owners to incentivize façade upgrades.
- Phase IV: Site redevelopment.

Phase IV: Site redevelopment. Redevelop the site according to the revised zoning regulations and design standards (Phase 0). Integrate housing on upper floors where appropriate. A traffic study and updated circulation plan should accompany the site redevelopment.

Action CC 2.B: Incorporate the transit-oriented development along Pennsylvania Avenue to create a corridor with services and amenities for residents and commuters.

Pennsylvania Avenue is a commercial corridor that needs to accommodate Upper Dublin residents, commuters, and visitors (using vehicles or the train). Due to its proximity to the Fort Washington Train Station and turnpike, Pennsylvania Avenue is suited for transit-oriented development. Transit-oriented development is contextual to its site, but generally refers to compact, sustainable, mixed-use development surrounding a transit center (e.g., the Fort Washington Train Station). Transit-oriented development can be supported by zoning. The following components should be reviewed during the update to Upper Dublin Township’s zoning ordinance:

- Evaluate building massing scenarios permitted by existing zoning to establish and encourage those standards that enable economically viable development consistent with the preferred community character.
- Evaluate the permitted uses and their placement on upper or lower floors to fully activate the street frontages.
- Evaluate bulk standards to identify whether any of the minimum or maximum building area, side yard, rear yard or height standards should be modified.
- Evaluate the 10-foot front yard setback and the ultimate right-of-way to provide for civic spaces, a more generous pedestrian streetscape and/or outdoor dining.
- Consider permitting and incentivizing on-street parking within the street right-of-way without reducing the number of travel lanes, possibly through a reduction of the off-street parking requirement.



Local Example

The Villages at Fairlands development in Lower Gwynedd Township on Bethlehem Pike provides an example of a mixed-use development along a major corridor. This example demonstrates a development that is contextually sensitive to the surrounding area while providing services and amenities along a commercial corridor.



Milestones

- Incorporate transit-oriented development principles into the zoning ordinance rewrite for the Pennsylvania Avenue area.
- Integrate the Cross County Trail into transit-oriented development.
- Identify principles that would be better suited for the Subdivision and Land Development Ordinance (SALDO).
- Modify the SALDO.



- Review lighting requirements to encourage pedestrian-scaled fixtures, provide for energy-efficient illumination of parking lots, and control light trespass.
- Consider hours of operation limitations for those uses that might negatively impact residential neighbors.
- Require streetscape elements (furnishings, plants, etc.) as a component of the building design standards.
- Consider incorporating the Pennsylvania Avenue street tree standards into the ordinance for ease of reference.
- Consult Montgomery County Planning Commission’s Transit-Oriented Development Guidebook and Model Ordinance.

Action CC 2.C: Develop a phased implementation approach to creating a mixed-use, walkable Greater Fort Washington District.

In 2017, an addendum to the 2010 Comprehensive Plan was added to include guiding principles for the Greater Fort Washington District. In 2019, the Upper Dublin Township Commissioners enacted ordinances for the Greater Fort Washington District that created the Greater Fort Washington (GFW) District which allows for a mix of uses, including office, commercial, industrial, institutional, multi-family, residential, recreational, transportation, and other complementary uses; revised height restrictions for the GFW; and added a manual of written and graphic design standards to the SALDO for the GFW. These ordinances set the regulatory framework to create a mixed-use, walkable, sustainable GFW. To enhance and encourage the redevelopment of the GFW, a phased approach is recommended:

Phase 0: Review the GFW district zoning regulations based on lessons learned with recent land development proposals and identify opportunities to fine-tune the regulations. One potential modification could be looking at the use requirements along certain corridors based on the findings from the fiscal feasibility analysis.

Phase I: Catalytic Area Master Plans. Spurring redevelopment of a district often starts with a catalytic project that creates a ripple effect. To date, redevelopment of the GFW has been piecemeal and scattered. Through a public-private partnership, the Township should engage developers to create master plans for areas that reflect the site’s specific conditions. These plans can help spur investment for the redevelopment.

Phase II: Adaptive Reuse. During the area master planning process, specific sites will be identified as suitable for adaptive reuse. These projects require interior (and minor exterior) renovations, rather than demolition, and therefore can be completed in a shorter time frame. Most of the vacancy in the office park is in the larger-footprint office buildings, whereas the lower vacancy rates are in buildings under 50,000 square feet. This suggests that the larger office buildings might be best suited for adaptive reuse.

Phase III: Redevelopment. This includes implementing the area master plans, including potential demolition and new construction, as well as enhancing the public realm through streetscaping.

Milestones

- Phase 0: Review of existing land use regulations.
- Phase I: Catalytic Area Master Plans
- Phase II: Adaptive Reuse.
- Phase III: Redevelopment.

CASE STUDY: Carmel Gateway

Rubenstein Partners is converting its office park in Carmel, Indiana into a mixed-use gateway district. Much like the GFW, the Carmel Gateway is located close to a major highway. The site design is based on the underlying block structure, situating buildings along the existing road network.

[Congress for New Urbanism \(CNU\). \(2022\) Turning an office park in a town center.](#)



Action CC 2.D: Implement a Transportation Demand Management (TDM) ordinance to help manage traffic impacts of new development.

Managing traffic is two-pronged: alleviating the number of cars on the road and facilitating efficient traffic patterns with the cars on the road. The first prong is addressed through some other goals and actions in the plan:

- Accessible Neighborhood Goal 1, create safe and accessible multi-modal connections, proposes improvements to the multi-modal network that will create safer pedestrian and bike environments, permitting more people to choose an alternative method of transportation within the Township to their car.
- Vibrant and Connected Community Spaces Goal 1, cultivate neighborhoods hubs, and Vibrant and Connected Community Spaces Goal 2, Actions CC 2.A and C, address creating more walkable commercial districts and a mixed-use district in Greater Fort Washington. These land use policies encourage compact development to reduce reliance on a vehicle to access services and amenities.

Milestones

- Consult with the GVF-TMA on the development of a TDM ordinance based on the Fort Washington TDM Plan.
- Determine regulations for TDM ordinance: requirements and/or incentives and applicability (size of land development, number of trips generated, location, etc.).
- Determine incentives for opt-in regulations.
- Present ordinance for adoption to the Board.
- Provide educational information on the TDM ordinance.



In addition to these actions, a TDM ordinance for new development can be established to alleviate vehicle impacts and facilitate efficient traffic patterns, the second prong of managing traffic. The TDM ordinance for new development could include:

- A required TDM Plan for the development.
- Required multimodal improvements (pedestrian pathways, bike lanes, etc.).
- Encouraged multimodal improvements (bike facilities, shuttle service, car share parking, etc.).
- Density bonus or parking reduction incentives if exceeding the required improvements.
- Education for residents/tenants.


DRAFT

CC Goal 3: Support and encourage local businesses.

What do we mean?

A local business is a business that provides goods or services to people who live or work nearby. In this case, we also mean a business that is locally owned and not a chain business. Local, small businesses are more beneficial to the local economy than larger corporations for the following reasons:³⁵

- “Small businesses have more of an impact because the local business contributes to the local expertise, direct community reinvestment, and the resilience and sustainability of the local economy.”
- “The local businesses tend to hire locally, ensuring that money stays within the community and fostering local employment.”
- Local businesses can adapt to changes in local community demand.
- Local businesses are more resilient, and since local businesses are smaller sized and more industries could be covered, one industry’s downturn would minimize the negative impact on the local economy.




Supporting local, small businesses was the number one priority in the business and economic development section of the survey.

What do we know?

The retail market is strong.

The Philadelphia MSA’s retail market has been gradually rebounding since the Covid-19 pandemic and has seen positive year-to-date net absorption of retail space. Montgomery County is a major retail hub and is strong in terms of retail occupancy and demand.

The average household in the PMA spends approximately \$2,230 per year on dining out at full-service restaurants and \$2,130 per year on dining out at fast food, takeout, or delivery food establishments, totaling nearly \$4,360 per year on food away from home (Figure 23).



Residents said they would visit commercial areas in Upper Dublin more often if there were more restaurants (45% respondents selected this response), more “everyday” retail (36%), and more “destination” retail (35%)

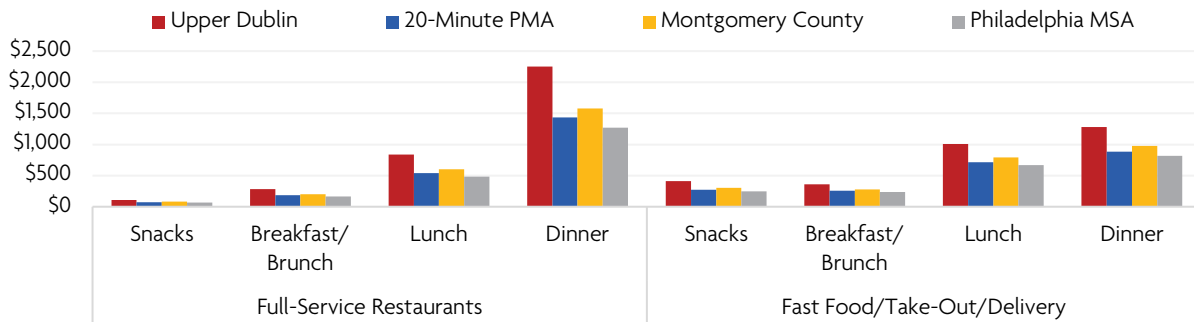
Additionally, as highlighted in the beginning of the plan, educational attainment and income levels are relatively high in the Township. For example, 70% of the Township’s adult population ages 25 and older have

³⁵ [Michigan Journal of Economics. \(2023\) Opinion: Why are Local Business More Vital to the Local Economy than Large Corporations?](#)

attained a bachelor’s degree or higher, compared to 43% in the MSA. Since educational attainment is often strongly and positively correlated with income, it is not surprising the median household income in the Township (\$155,407) is also significantly higher than that in the MSA (\$83,525). People with higher incomes tend to have higher disposable incomes and the ability to spend more on non-essential items, which can help support local businesses.

Figure 23: Average Annual Household Expenditures on Dining Out

Source: ESRI (2021)



Housing supply and affordability is integral to supporting a healthy business environment.

The county’s unemployment rate is historically low (2.7% as of October 2023), indicative of an extremely tight labor market. Some companies may face challenges in expanding or meeting consumer demand, due to a limited pool of workers and a tight housing market.

With over 37,320 primary job workers commuting more than 25 miles to work in the PMA, a variety of factors are likely limiting the ability of these workers to live closer to work (e.g., high housing costs, tight vacancies, limited housing choice).

A variety of housing in the Township, as explained in the Accessible Neighborhoods section of the plan, could not only increase its customer base to attract and support additional retail establishments, but also help address challenges in hiring faced by existing businesses in the Township.

There is untapped potential in entrepreneurship.

Another impact of the COVID-19 pandemic was the spur in entrepreneurship, especially home-based businesses. A significant share of entrepreneurs are older adults who are represented more than 25% of all new enterprises in 2018 and the rate continues to grow.³⁶ With the share of older adults increasing in the Township, there are undoubtedly residents in the Township who are considering or actively pursuing entrepreneurship. Entrepreneurship leads small business creation which in turn stimulates the local economy.

³⁶ [AARP. \(2019\) More Adults Over 50 Starting Their Own Businesses.](#)

Why is this important?

- Commercial land use helps taxpayers by paying more than they require in services.
- More small business leads to increased consumer spending and tax revenues.
- Thriving business attracts families and younger generations to the area, diversifying the age groups within the Township.

How can we move forward?

Action CC 3.A: Identify barriers to home-based businesses in the existing zoning ordinance.

Many entrepreneurial endeavors begin as home-based businesses. Home-based businesses allow an entrepreneur to test out ideas without the burden of office/retail space rent costs. It also allows more flexibility for individuals who may need to work nontraditional hours due to other commitments, such as caretaking. There are many organizations that support entrepreneurs (see Action CC3.B); however, one of the greatest roles a municipality can play in supporting entrepreneurs, especially those who start home-based businesses is through zoning regulations that help, rather than hinder operations. During the Upper Dublin Township zoning ordinance and map update, the ordinance should be reviewed to identify potential barriers to home-based businesses.

Examples of potential barriers include:

- Limited types of professions permitted as a home-based business.
- Strict operating hours.
- Parking requirements.
- Use conversion limitations (e.g., a living to studio space conversion).
- Restoration or maintenance of Historic Property.

Milestones

- Review home-based business use definition and regulations during zoning ordinance and map update.
- Include more flexible regulations for conversions, parking, operating hours, and use types for home-based business.
- Monitor variance cases every two years to identify if any additional barriers exist.



Action CC 3.B: Connect local businesses with existing Township institutions for recruitment and job training.

As identified in this plan, Upper Dublin has a rich educational institution landscape. The Businesses and Major Employers Focus Group discussed the opportunity to connect businesses with each other and local education institutions, such as Temple-Ambler and the UD School District for recruitment and job training. Additionally, Montgomery County has a Business Services Team that assists employers with workforce recruitment and retention. When a new business opens in Upper Dublin Township, they will most likely need permits for operations and/or renovations to their space. When new businesses reach out to the Township, the Township can provide a brochure with information and contacts for existing institutions and the County who can help support the new business. The brochure can also be shared with existing businesses and the Eastern Montgomery County Chamber of Commerce (EMCCC). EMCC offers several resources for new and emerging businesses and leaders aimed at fostering economic growth through networking advocacy, and resource provision. New businesses can benefit from the partnerships EMCC has with local businesses and educational institutions to offer training programs, job fairs, and workforce development initiatives.

Milestones

- Collaborate with Montgomery County, UD School District, Temple-Ambler, and the EMCCC on content for a local business brochure.
- Produce the brochure.
- Share the brochure with new and existing businesses.
- Solicit “success stories” from local businesses to monitor connections made.

In addition to Actions CC 3.A and CC3.B, many of the other actions in this plan support small businesses including:

- Action AN 2.A: Adopt a form-based zoning code. Form-based zoning codes are more flexible and therefore there are fewer regulatory hurdles in establishing a location for small businesses.
- Action CC 2.A: Develop focused and phased improvement plans for neighborhood shopping centers.
- Action CC 1.A: Permit small, low-impact, neighborhood-serving retail uses in portions of residential districts along main corridors.
- Action CC 2.C: Develop a phased implementation approach to creating a mixed-use, walkable Greater Fort Washington District.

ADPATIVE & RESILIENT ENVIRONMENT

Introduction

The Adaptive and Resilient Environment (RE) Focus Area details planning for an engaged and proactive local government and community that champions environmental protection, sustainable action, and disaster resilience.

Goals to achieve an adaptive and resilient environment in Upper Dublin are to:

Adaptive and Resilient Environment (RE)

Goal 1: [Build environmental sustainability and resiliency.](#)

Adaptive and Resilient Environment (RE)

Goal 2: [Increase community-wide participation in environmental stewardship.](#)



Consistency with Montco 2040

The goals and associated key actions in the Adaptive and Resilient Environment Focus Area are consistent with the following goals in Montco 2040:

Connected Communities

- Encourage collaboration and partnerships among governments, businesses, institutions, schools, higher education, and other stakeholders.

Sustainable Places

- Support a modern, resilient, green, and energy-efficient infrastructure network.
- Improve stormwater management and reduce the impact of flooding.

RE Goal 1: Build environmental sustainability and resiliency.

What do we mean?

Sustainability is the ability to meet the needs of the current population without compromising that ability for future generations. Resiliency is the ability of a system to prepare for threats, absorb impacts, and recover and adapt after disruptive events. These concepts work in tandem when considering the Township's operations, facilities, and policies. This goal focuses on actions that the Upper Dublin Township government can take to build the sustainability and resiliency of the Township's facilities, fleet, and natural environment, serving as an example and model to residents.

What do we know?

Upper Dublin has invested in parks, recreation, and open space.

There are currently 45 municipally owned parks and open spaces which include undeveloped and protected natural areas. These parks range in size and use with the largest park being Twinning Valley at 100 acres and the smallest being East Oreland. Upper Dublin is ranked #2 in municipal-owned parks and open space of the 62 townships and boroughs in Montgomery County based on the amount of parks and open space land. As highlighted in the beginning of the plan, these spaces not only provide cultural and recreational benefits, but also provide regulating and supporting services for the ecosystem.

Upper Dublin has already experienced climate change impacts and will continue to see increases in climate change-related events.

The Montgomery County Hazard Mitigation Plan, adopted in 2022, identified floods, flash floods, ice jams, and winter storms as the highest-rated risks for the Township. These hazards are due to the Township's flat to rolling topography which makes the area susceptible to flooding.³⁷ Climate change will exacerbate these events in the coming years. The Montgomery County Climate Change Potential Vulnerability Analysis identifies much of the Greater Fort Washington District and a portion of Dresher Triangle as having above average climate risk. The assessment combines socio-demographic, health factors, and critical infrastructure with historical temperature and flooding data from the Federal Emergency Management Agency (FEMA), the Montgomery County Division of Emergency Management, and the Delaware Valley Regional Planning Commission (DVRPC) to create impact indexes for heat, flooding, and potentially disadvantaged populations.³⁸ Figure 24 and Figure 25 show area of heightened flood risk and heat vulnerability which both contribute to the area's climate change vulnerability.

³⁷ [Montgomery County. \(2022\) Montgomery County Hazard Mitigation Plan.](#)

³⁸ [MCP. \(2021\) Montgomery County Climate Change Potential Vulnerability Analysis.](#)

Figure 24: Heightened Flood Risk Areas

Source: Montgomery County Climate Change Potential Vulnerability Analysis (2021)

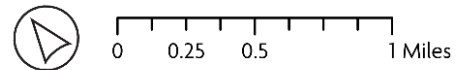
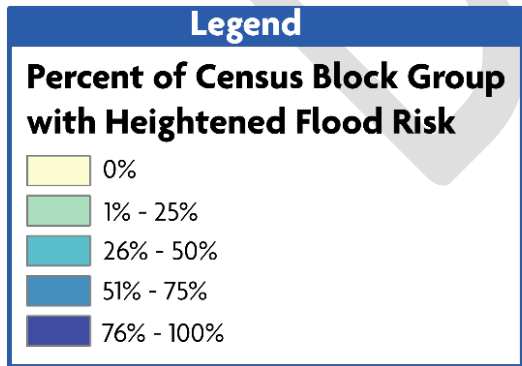
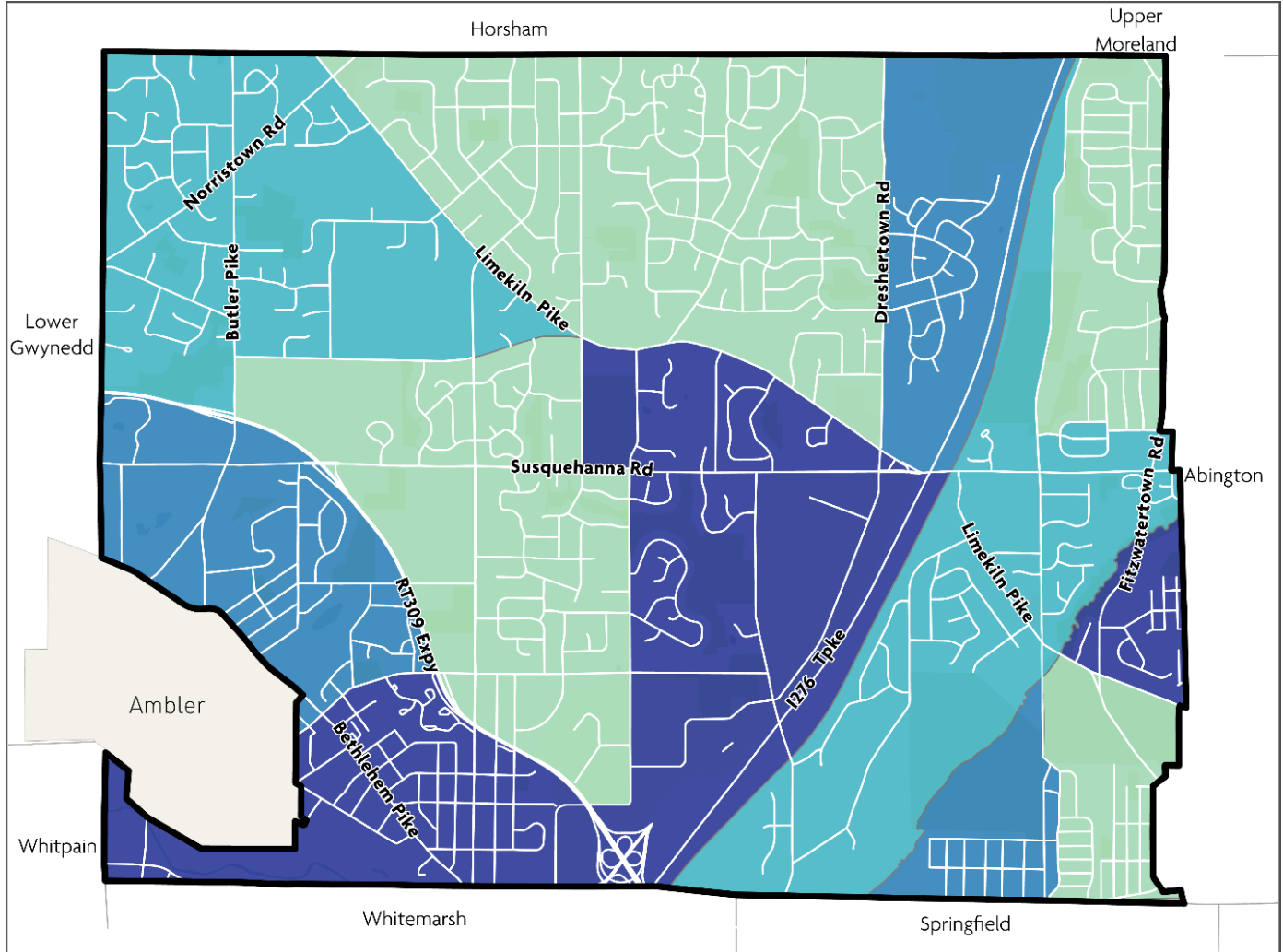
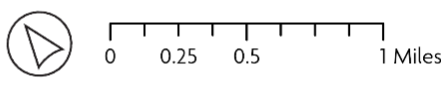
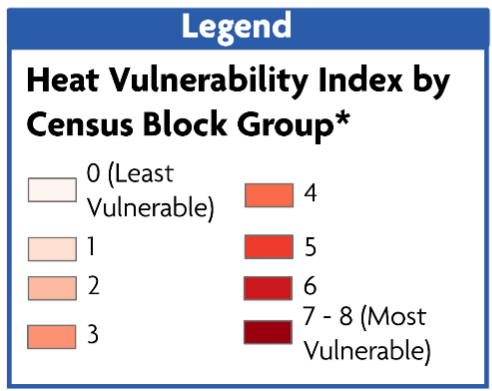
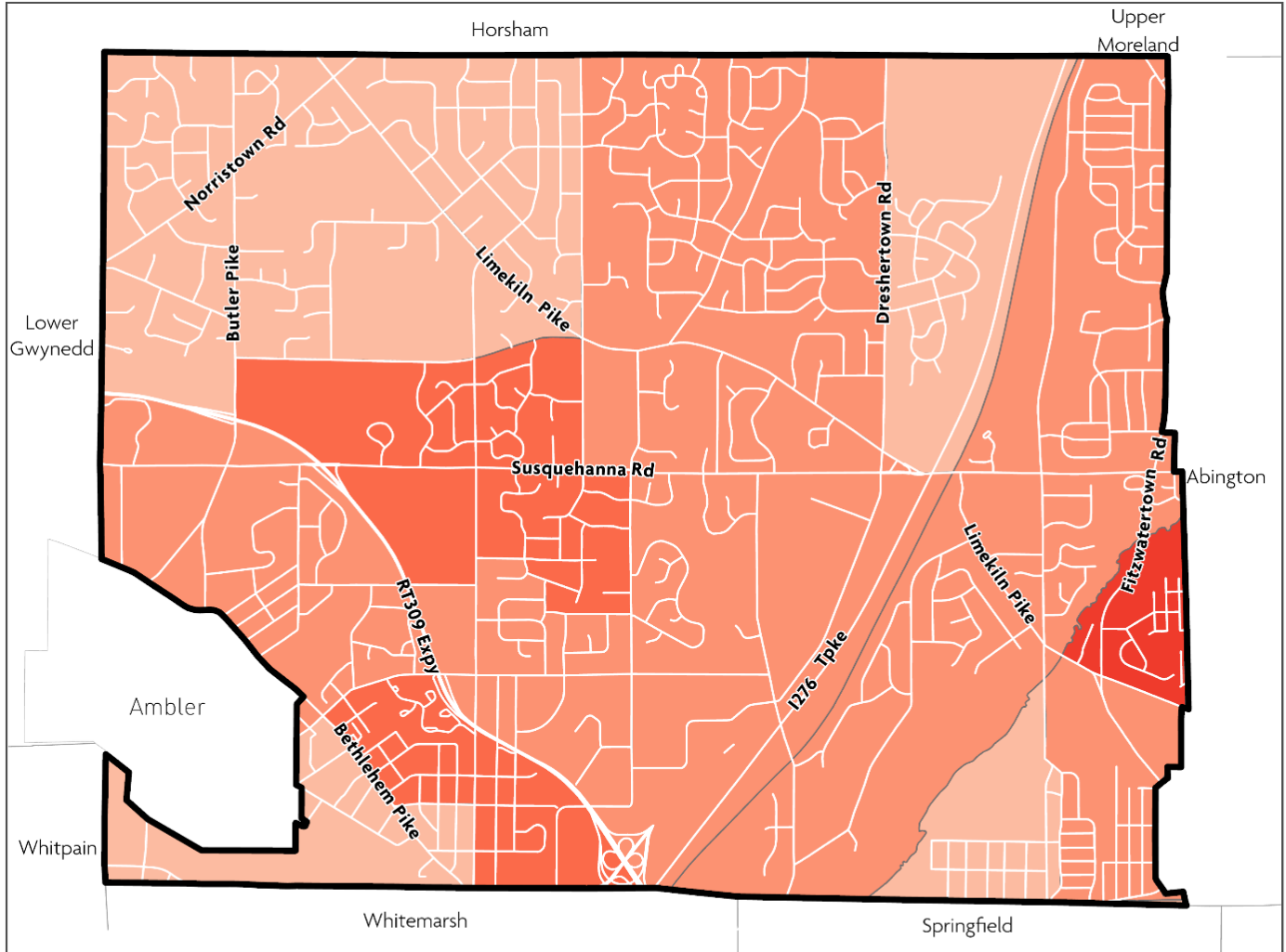


Figure 25: Heat Vulnerability Index

Source: Montgomery County Climate Change Potential Vulnerability Analysis (2021)



*The final score is representative of an index that combines the following factors: ethnic and racial minorities, children under the age of 5, adults over 65 years old living alone, households with limited English proficiency, and household income. This analysis was then combined with exposure to high surface temperatures to get the final score.

Upper Dublin invests in its tree canopy.

Upper Dublin has Tree City USA status from the Arbor Day Foundation meaning that Upper Dublin meets the following criteria: has a tree board or department, a tree-care ordinance, an annual community forestry budget of at least \$2 per capita, and an Arbor Day observance and proclamation.

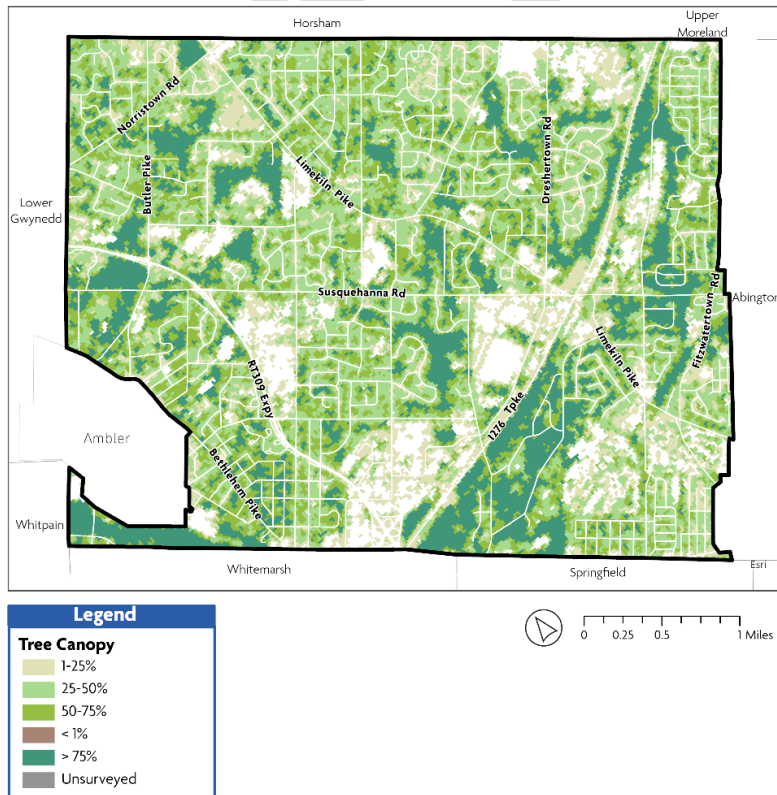
Upper Dublin Township has a Shade Tree Commission that was established in 1994 as custodians to shade trees in the Township, defined as "any tree having more than fifty percent (50%) of its trunk diameter at breast height within the right-of-way of a public street or on Township property."³⁹

The Shade Tree Commission host the following programs:

- Adopt a Tree Event
- Annual Tree Planting Program
- Arbor Day Program
- Heritage Tree Registry program for trees of magnificent size, age, or species.
- Tree Planting and Care Fund: This fund was established after the tornadic events of September 1, 2021 during which hundreds of trees were destroyed.

Figure 26: Tree Canopy in Upper Dublin

Source: NLCD (2024)



³⁹ [Upper Dublin Township. \(2024\) Shade Tree Commission.](#)

Upper Dublin is a partner in promoting water quality regionally.

Upper Dublin Township is a member of the Wissahickon Clean Water Partnership (WCWP), a coalition of 13 municipalities and four wastewater treatment plants collaborating to improve the health of the Wissahickon Creek. The WCWP works with the PA DEP and the US EPA to address impaired health of aquatic life and inadequate stormwater management in the Wissahickon Creek Watershed. Almost the entirety of Upper Dublin is in the Wissahickon Creek Watershed. The watershed’s headwaters begin just below a parking lot in a large suburban mall; the mainstream flows approximately 27 miles before joining with the Schuylkill River in the City of Philadelphia.

The mainstream of the Wissahickon and most of its tributaries are considered impaired for aquatic life uses by the PA DEP. This impairment determination is largely based on the results of long-term aquatic macroinvertebrate sampling in the watershed. Many stretches of streams are also classified as impaired due to nutrient and siltation levels. The WCWP is currently developing a watershed-wide Water Quality Improvement Plan to restore the health of the Wissahickon creek and its tributaries. This plan will guide municipalities in identifying and prioritizing projects, policies, and collaborative programs to gain efficiencies where applicable. It will include recommendations for stormwater projects and policies, treatment plant optimization, public education and outreach, implementation metrics, and reporting requirements. Project implementation goals focus on reducing volume and velocity of stormwater, restoring baseflow of waterways, reducing impervious land cover, improving natural habitats, reducing erosion of waterways, and improving ecological conditions of waterways.⁴⁰

The Township is susceptible to flooding.

Due to Upper Dublin’s natural rolling topography, the Township experiences accelerated runoff during rainfall events and low-lying areas regularly flood. Much of the land affected by floodplains is not residential, but rather commercial office space or open space. Specifically, the most susceptible areas within Upper Dublin include the Fort Washington Office Park and the section of Pennsylvania Avenue near the 309 interchanges (Figure 27).



Stormwater management and restoring and expanding the tree canopy were the top two priorities.

In 2014, construction of two dams upstream of Fort Washington Office Park was completed, the Pine Run and Rapp Run Flood Retarding Structures (FRS). They were designed to capture storm water during severe rain events and reduce downstream flooding by slowly releasing runoff to allow infiltration into the ground and streams, limiting the frequency, intensity, and duration of flooding. Both structures have extensive landscaping with wetland plantings to support infiltration.⁴¹ In 2018, FEMA approved a Letter of Map Revision, identifying locations with reduced flood risk due to these two structures. FEMA notes in the letter that their determination is based on the “1-percent-annual-chance discharges computed in the submitted hydrologic model. Future development of projects upstream could cause increased discharges, which could cause increased flood hazards. A comprehensive restudy of your community’s flood hazards would consider the

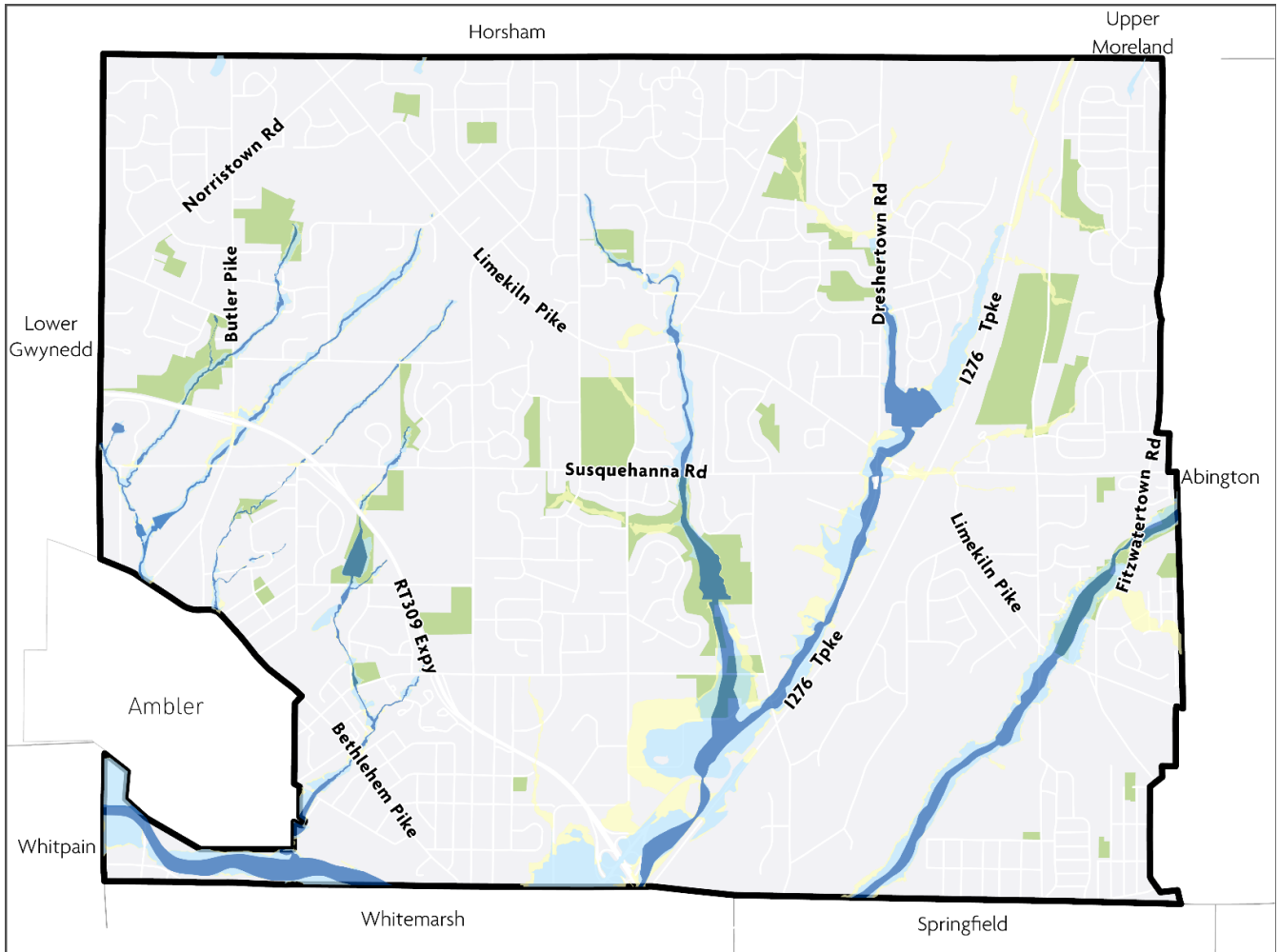
⁴⁰ [Wissahickon Trails. \(2023\) Wissahickon Clean Water Partnership.](#)

⁴¹ [Montgomery County Board of Commissioners. \(2014\). Fort Washington Office Park Resilient Infrastructure.](#)

cumulative effects of development on discharges and could, therefore, indicate that greater flood hazards exist in this area.”⁴² Upper Dublin Township should consider conducting a detailed flood study to see how flood risk may have changed since the 2018 designation.

Figure 27: Floodplain Map

Source: FEMA (2024)



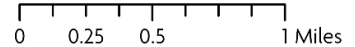
Legend

1% Annual Chance Flood Hazard

- Flood Fringe
- Floodway

.2% Annual Chance Flood Hazard

- 0.2% Annual Chance Flood Hazard



⁴² [Upper Dublin Township. \(2018\) Letter of Map Revision Document.](#)



Upper Dublin Municipal Authority has also incorporated stormwater management components into many infrastructure improvement projects. In 2017, the Township finished the Virginia Drive Pine Run Bridges Reconstruction project and Rapp Run Culvert Replacement project. The ongoing Fort Washington Cross County Trail and Road Diet is replacing several culverts, stabilizing the Bodenstein Channel, and improving roadway drainage. The Township should continue to ensure that municipal infrastructure projects include stormwater retrofits that meet the Township's stormwater management requirements and plan for future discharge levels.

The Township has adopted ordinances related to stormwater management, steep slopes, impervious surfaces, tree protection and replacement, and more to minimize stormwater runoff and street flooding and to protect the Township from development which may cause flooding. The Township should continue to take a proactive approach to update ordinances related to stormwater management to ensure requirements keep pace with changing weather conditions that lead to increased flood risk.

Upper Dublin Township continues to participate in updates to the Montgomery County Hazard Mitigation Plan (HMP) every five years. The HMP details a mitigation action plan with specific actions for municipalities and the County to take to reduce risk to natural and human-caused hazards. The 2022 County HMP was adopted by Upper Dublin in 2023, signing the Township on to implementing included mitigation actions. Actions related to reducing flood risk include investigating the feasibility of technology that can predict flash floods, training municipal code officials in building resiliency and mitigation of structures, elevating or relocating homes in the floodplain that have sustained damage from past floods, studying effectiveness of existing stormwater basins to identify needed improvements to address, and conducting local flood studies.⁴³ The Township should designate a staff member to annually review progress towards mitigation actions and coordinate with Township departments and commissions to implement actions

Upper Dublin is committed to environmental sustainability and energy efficiency in its new Township building.

Upper Dublin Township is actively taking steps to become a leader in facility sustainability through its new Township building. The new Township building will be net-zero and is applying green building and construction practices including, efficient building design, reducing impervious cover, diverting demolition waste from landfills through recycling and construction waste management, generating energy on-site, providing EV charging, and more.⁴⁴

The Environmental Protection Advisory Board (EPAB) Transition Plan for Upper Dublin Township Municipal Operations documents existing challenges and proposed solutions to building energy conservation and renewable energy efforts.

The EPAB presented a Renewable Energy Transition Plan to the Upper Dublin Board of Commissioners in 2021 that outlines recommendations in four focus areas:⁴⁵

⁴³ [Montgomery County Planning Commission. \(2022\) Montgomery County 2022 Hazard Mitigation Plan.](#)

⁴⁴ [Upper Dublin Township Environmental Protection Advisory Board \(EPAB\). \(2024\) Environmental Open House Slide Deck.](#)

⁴⁵ [Upper Dublin EPAB. \(2021\) Transition Plan for Upper Dublin Township Municipal Operations.](#)



1. Focus Area 1: Transition to Renewable Electricity and Renewable Natural Gas for the Township’s energy needs.
2. Focus Area 2: Reduce fossil fuel use by Township fleet operations.
3. Focus Area 3: Adopt clean energy best practices for Township buildings and operations.
4. Focus Area 4: Engage and lead the community in the adoption of clean, renewable electricity, for transportation and in commercial and residential buildings.

These goals are the result of extensive planning and research efforts.

Why is this important?

- Climate change impacts are occurring at rates even faster than first predicted.
- There are human, environmental, and economic costs to these climate change impacts that is only exacerbated by inaction.

How can we move forward?

Action RE 1.A: Continue investing in the Township tree canopy to reduce risk to extreme heat.

Areas with the highest heat vulnerability indexes are also areas with lower levels of tree canopy. Upper Dublin should continue investing in its tree canopy to reduce vulnerability in those areas. The Shade Tree Commission has provided over 6,000 trees to residents for free through the Adopt-A-Tree program since 1996 and has planted several hundred trees through the Annual Tree Planting program. The Commission should focus efforts for the Annual Tree Planting program in areas with the highest heat vulnerability, see Figure 25. These areas are generally as follows:

- Area bounded by Highland Ave on the north, Route 309 on the east, Pennsylvania Avenue on the south, and Bethlehem Pike on the west.
- Area bounded by Meetinghouse Road on the north, Fort Washington Avenue and Pinetown Road on the east, Loch Alsh Avenue on the south, and Route 309 on the west.
- Area bounded by Sandy Run on the north and west, Penn Avenue on the east, and Limekiln Pike on the south.

Milestones

- Survey priority areas for tree plantings to identify potential locations for plantings through the Annual Tree Planting program.
- Develop a list of locations for tree plantings in the priority areas, noting address and any considerations for planting.
- When planning for the Tree Program each year, choose locations on the priority list. Make sure to distribute available trees evenly across the priority areas.
- After five years, survey each of the priority areas again to identify the changes in conditions based on tree plantings. Assess and revise the priority planting location list as needed to focus Township resources where they will be most impactful.



Note that data providing the above priority areas was analyzed before the tornado swept through Upper Dublin in September 2021. Areas heavily impacted by the tornado should also be prioritized for the Annual Tree Planting program. Loss of trees has likely left areas impacted by the tornado more vulnerable during extreme heat.

The Shade Tree Commission should first survey these general areas to identify potential locations for tree plantings. The Commission would then create a master list of identified locations. When planning for the Tree Planting program each year, prioritize planting in the list of identified locations, distributing available trees evenly across the priority areas with the highest heat vulnerability indexes.

Action RE 1.B: Continue participation in the Wissahickon Clean Water Partnership (WCWP) and implement the Water Quality Improvement Plan.

As a partner of the WCWP, Upper Dublin is committed to the clean water and stormwater management goals and objectives of the partnership. As noted, the WCWP is in the process of developing a Water Quality Improvement Plan for the Wissahickon Watershed. Once adopted by the United States Environmental Protection Agency (US EPA) and Pennsylvania Department of Environmental Protection (PA DEP), Upper Dublin should begin steps to implement projects and policies identified in the plan. The Township should pass a resolution committing to implementing these projects and policies. Projects and policies should be organized into a detailed implementation matrix to assign a lead and necessary partners, identify potential funding sources, draft a timeframe, and determine outputs for each project and policy.

Milestones

- Once adopted the by US EPA and PA DEP, pass a resolution committing Upper Dublin to implementing projects and policies identified in the Water Quality Improvement Plan for the Wissahickon Watershed.
- Develop an implementation matrix for these projects and policies. Include performance measures to evaluate implementation outcomes.
- Assign projects and policies to their respective leads. This may be a Township department or commission or another stakeholder in the township.
- Evaluate implementation outcomes annually.



Action RE 1.C: Conduct and implement a stormwater and stormwater facilities study and evaluate stormwater management improvements.

A community’s flood risk is determined through many factors, including general topography, locations of watercourses, weather patterns, development trends, and stormwater management practices. As conditions change, risk may increase or decrease in specific locations. Upper Dublin has implemented several stormwater management projects over the past ten years to reduce flooding on roadways and in neighborhoods. However, impacts from climate change, including more frequent and heavier storms, and local and regional development may have increased flood risk in the Township. Upper Dublin should conduct a comprehensive restudy of flood hazards in the Township to better understand how risk has changed over the past decade. Furthermore, the study should include maintenance and inspection of stormwater management facilities.

Milestones

- Conduct a stormwater study.
- Present findings and recommendations to the Board of Commissioners for adoption.
- Township Manager to coordinate project implementation.
- Evaluate implementation outcomes annually.

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.

The 2023 Open Space Plan advocates for the adoption of an Official Map. An Official Map is a combined map and ordinance that identifies the location of planned public lands and facilities. It is an official declaration by the governing body of a municipality’s interest in acquiring private lands for public purposes sometime in the future. Public purposes may include proposed streets, parks, open spaces, trails, transit routes, and flood control and stormwater management facilities.⁴⁶ An Official Map would help coordinate the actions within this plan regarding Township improvements and facilities.

Milestones

- Community Planning and Zoning Department develops a draft official map and ordinance based on existing plans and staff input.
- Deliver the draft to other Township staff for review.
- Revise the official map and ordinance as needed.
- Present the draft official map and ordinance to the Board of Commissioners for adoption.

⁴⁶ PA Department of Community and Economic Development (DCED). (2024) Official Map.



Action RE 1.E: Continue to review and update floodplain and stormwater management ordinances to reduce flood risk in the Township.

The Township has several ordinances in place to manage development and stormwater related infrastructure to reduce flood risk for communities. Staff should continue to review and update these ordinances to further reduce risk and keep pace with changing development and climate trends. The Township Zoning Officer and Engineer should develop a plan defining how frequently ordinances related to floodplain and stormwater management should be reviewed. When reviewing ordinances, the Township should refer to resources from partners such as FEMA, PEMA, DVRPC, and MCPC to assess changes in flood risk and options to reduce risk through code changes.

Milestones

- Develop a plan defining frequency and parameters to review ordinances related to floodplain development and stormwater management.
- Refer to industry resources and coordinate with partners when reviewing and updating ordinances.
- Present any ordinance update proposals to the Board of Commissioners for adoption.

Action RE 1.F: Implement recommendations identified in the Renewable Energy Transition Plan for Upper Dublin Township Municipal Operations.

The Environmental Protection Advisory Board developed a renewable energy transition plan for Upper Dublin Township. As a result, the Board of Commissioners adopted Resolution 21-2446: Resolution Establishing and Advancing the Township’s Renewable Energy Goals. This was the first recommended action in the plan. The plan then recommends that the Township designates an Energy Manager to coordinate plan implementation for the Township and serve as a public resource to residents and businesses. This is a key step to organizing actions needed to fully adopt renewable energy in the Township and focus on energy conservation and transition to sustainable technologies, such as electric vehicles. If necessary, the Township

Milestones

- Define the roles and responsibilities of a Township Energy Manager.
- Designate an Energy Manager from existing Township staff, with guidance from an energy consultant if needed.
- Energy Manager to work with Township staff to develop a detailed implementation plan for recommendations from the Renewable Energy Transition Plan. Determine necessary steps, stakeholders, timelines, and funding sources to implement each action.
- Energy Manager to produce an annual report with the Environmental Protection Advisory Board for the Board of Commissioners reporting on plan implementation.



should engage an energy transition and conservation consultant for further assistance. Recommendations in the plan cover a variety of energy transition and conservation methods, such as conducting energy audits on Township buildings and transitioning the Township fleet to hybrid or electric vehicles.

Action RE 1.G: Implement recommendations identified in the 2022 Montgomery County Hazard Mitigation Plan.

Upper Dublin Township adopted the 2022 Montgomery County Hazard Mitigation Plan in September 2023. This commits the Township to implementing mitigation actions detailed in the plan to reduce risk to and impacts from hazards that can occur here, such as flooding or tornados. Upper Dublin should continue to make steps toward implementing projects and policies identified in the 2022 County HMP. Projects and policies should be organized into a detailed implementation matrix to assign a lead and necessary partners, identify potential funding sources, draft a timeframe, and determine outputs for each project and policy. The Township Manager should evaluate implementation outcomes annually and report updates to the Board of Commissioners and the Montgomery County Planning Commission.

Milestones

- Develop an implementation matrix for actions in the 2022 HMP. Include performance measures to evaluate implementation outcomes.
- Assign projects and policies to their respective leads. This may be a Township department or commission or another stakeholder in the township.
- Evaluate and report on implementation outcomes annually.

Action RE 1.H: Pursue Gold Sustainable PA certification.

Upper Dublin Township currently has Silver Sustainable PA certification. Sustainable PA helps municipalities achieve sustainability goals, empowering them to save money, conserve resources, and innovate to improve the lives of their residents. It encourages the municipality to work towards creating a positive and regenerative relationship with the environment.⁴⁷

Milestones

- Evaluate Gold Sustainable PA certification parameters. Identify parameters for Upper Dublin to pursue.
- Work with Township staff and commissions to implement parameters needed to reach Gold certification.

⁴⁷ Sustainable Pennsylvania. (2024) Certification Program.

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

What do we mean?

The Township can play a role in engaging community members in building environmental sustainability and resilience and being good stewards of the environment. This can be done through the “carrot” or the “stick.” The carrot approach provides incentives and education to encourage environmental stewardship. If the Township imposes specific regulations for property owners and residents regarding environmental stewardship, then the stick approach would be the fine or penalty imposed if the regulation is not followed.



“Provide incentives and leadership for building and construction to prioritize adaptive reuse and renovations, integrate renewable energy, exceed basic energy codes on insulation and airtightness, promote lower carbon mechanical systems and building materials, etc.”

What do we know?

Upper Dublin provides opportunities for residents to engage in environmental stewardship.

- UD Litter Patrol: The UD Litter Patrol partners with UD Parks and Recreation and UD CARES on coordinated litter clean-up events.
- Residents have access to a compost facility to drop off yard waste and collect mulch.
- The Township offers weekly collection of mixed recycling.
- EPAB organizes a yearly Earth Day initiative and environmental open house.

Upper Dublin residents are transitioning to electric vehicles and infrastructure is needed to support this transition.

It is well-documented that personal vehicle use contributes to large portions of greenhouse gas emissions. Electric vehicles are an emerging technology to reduce vehicle emissions and Upper Dublin residents are embracing them. The DVRPC Mapping Vehicle Distribution and Workplace Charging Demand map shows that the majority of Upper Dublin has 0.71 – 3.740 personal electrical vehicles per 100 people, which is on the higher end of the spectrum (Figure 28). There is also high demand for workplace charging in the GFW District. This toolkit can be used by business owners and developers to plan EV charging stations on their sites (Figure 29).⁴⁸

⁴⁸ [DVRPC. \(2021\) Mapping Vehicle Distribution and Workplace Charging Demand.](#)

Figure 28: Number of Personal EVs per 100 People

Source: DVRPC (2021)

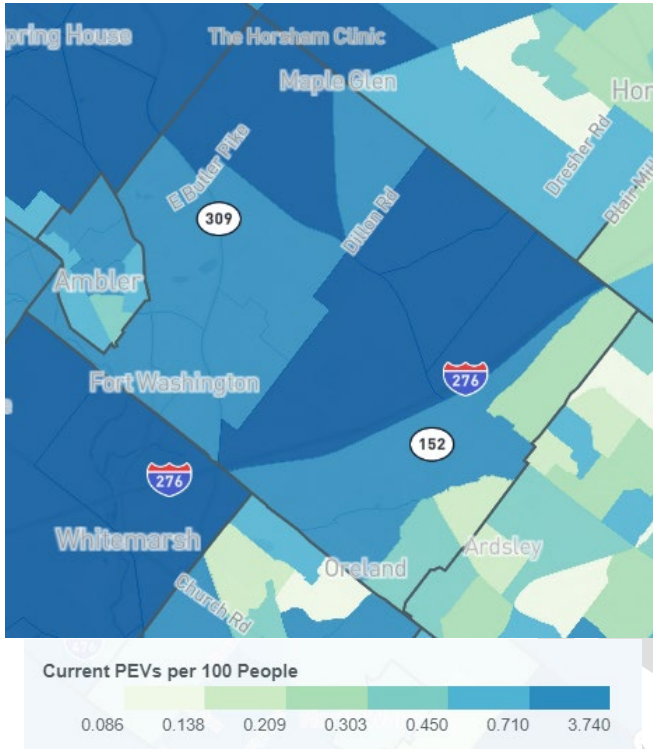
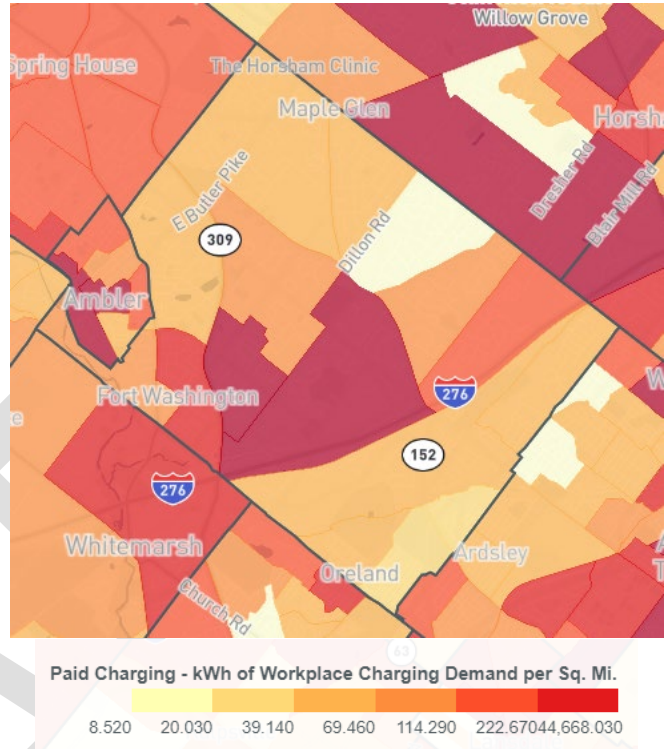


Figure 29: Workplace Charging Demand

Source: DVRPC (2021)



Why is this important?

Environmental stewardship is the responsibility of everyone. The Township can be a leader in this field and through accomplishing RE Goal 1, lead through example; however, all Township residents and business owners need to be partners in this work.

How can we move forward?

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

An important step in cultivating environmental stewards is through education. The Upper Dublin EPAB provides educational resources throughout the year and especially during its annual Open House event. By implementing a Sustainable Property Program, the EPAB could recognize property owners who are integrating sustainable approaches on their property and establish a platform for continuing education on these topics. The Sustainable Property Program would include formal recognition (yard sign, website mention, etc.) for property owners whose properties meet a certain list of criteria.

Milestones

- Develop Sustainable Property Program guidelines and requirements.
- Create educational materials about the program to share with residents.
- Present the Sustainable Property Program to the Board of Commissioners.
- Distribute educational materials and promote the program through Township communications channels.

Local Examples



Whitpain Township has a Sustainable Property Program that aims to educate residents on approaches they can take to preserve the natural environment on their property and recognize property owners that implement the approaches.

Doylestown Borough has a Green Points Program with a comprehensive list of material, land use and stormwater, indoor air quality, energy, water conservation, and solar approaches to qualify to reduced permit fees.

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

Communities across Pennsylvania are adopting policies to encourage efficient, sustainable, and more resilient building and land use practices.⁴⁹ The Township should create an incentive program to encourage use of sustainable building methods in renovations and new construction. If property owners implement specific methods, they could qualify for reduced or waived permitting fees, for example.

Milestones

- Develop Green Building Program guidelines and requirements.
- Create educational materials about the program to share with residents and developers.
- Present the Green Building Program to the Board of Commissioners.
- Distribute educational materials and promote the program through Township communications channels.

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

In order to promote more sustainable construction practices, the Township should develop an incentive program for projects that meet or exceed specific LEED or Energy Star Ratings. Projects can earn LEED certification by adhering to practices that address carbon, energy, water, waste, transportation, materials, health, and indoor environmental quality⁵⁰, while Energy Star scores provide a snapshot of a building’s energy performance.⁵¹ The Township should first consider what requirements from these two certifications to prioritize for promotion in Upper Dublin. These could include requirements for selecting materials, reducing GHG/carbon emissions in construction and operations, and more. Incentives for property owners could include modifications to parking requirements, building lot area, building height, waived permitting fees, or other actions to promote more sustainable building practices.

Milestones

- Define Building Energy Incentive Program requirements and parameters in coordination with Code Enforcement and the Environmental Protection Advisory Board.
- Create educational materials about the program to share with residents and developers.
- Present the Green Building Incentive Program to the Board of Commissioners for a resolution adoption.
- Once adopted, Code Enforcement would administer the program.

⁴⁹ [PA Construction Codes Academy. \(2020\) Leveraging Local Incentives to Drive Building Efficiency and Community Resilience.](#)

⁵⁰ [US Green Building Council. \(2024\) LEED Rating System.](#)

⁵¹ [Energy Star. \(2024\) Analyze Benchmarking Results.](#)

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

The Township should conduct a comprehensive review of its ordinances to identify areas that may limit residents’ and businesses’ ability to implement sustainable practices on their properties. Areas to review include, but are not limited to:

- Lawn mowing and yard maintenance requirements that may prohibit yard naturalization (also known as “wilding” or “rewilding”. Encouraging lawn to meadow or forest conversions in appropriate cases can address multiple environmental concerns, including curbing stormwater runoff and nurturing a diverse ecosystem of native plant species and pollinator-friendly plants. Many communities throughout the United States have modified their ordinances to permit yard naturalization. Upper Dublin would investigate model ordinances that have had success in other communities to ensure the benefits of yard naturalization while avoiding the nuisance of an “overgrown” yard. Twining Valley Park has introduced “wilding” into its landscaping.
- Private frontage requirements that may limit ability to install outdoor awnings, which can reduce heat that enters a home by up to 80%.⁵²
- Building requirements that may limit the ability to install renewable energy systems, such as solar panels, geothermal heating systems, solar water heating, wind energy systems, and more.

Milestones

- Conduct a comprehensive review of Township ordinances related to environmentally sustainable practices.
- Coordinate with the Environmental Protection Advisory Board to review and update ordinances as needed to promote sustainability on private properties.
- Present any proposed updates to the Board of Commissioners for Approval.
- Once approved, the Code Enforcement Department will administer the updated ordinances.

The Township should work with the Environmental Protection Advisory Board to conduct this ordinance review before submitting a proposal to the Board of Commissioners.



Example of yard naturalization. Source: Penn State Extension

⁵² [FEMA. \(2024\) Extreme Heat – Mitigation \(Property\).](#)

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

The Township should promote the work being done to transition Township facilities and fleets to renewable energy sources and reduce fuel use. Providing information about the benefits of these transitions and process to implement them can educate communities about different options to consider and encourage people to take part in energy transition in their homes or businesses.

The Environmental Protection Advisory Board suggests providing education on and promoting the following topics:

- Rebates and tax reductions and benefits through the Inflation Reduction Act for adopting energy efficient technologies.
- Different options for EV models, with a suggestion to have some options on display.
- Products and services available through private sector installers, such as solar panels, heat pump installations, and building insulation.
- Home energy audits and potential resulting energy savings.

These topics could be covered through educational materials shared online and in person, holding sessions on specific topics, or by establishing an annual Clean Energy Fair to educate residents about these topics.

Milestones

- Develop a public awareness and education plan related to actions the Township takes and actions communities can take to protect and promote the environment.
- Work with the Environmental Protection Advisory Board to host educational events in the township.
- Work with the Communications Department to share information online through the Township website and newsletters, and with local organizations to share information with their communities.

FUTURE LAND USE

Introduction

The Future Land Use Map (FLUM) is a key component of UD Plan because it plans for the amount, intensity, and character of development, redevelopment, and preservation over the next decade.



Consistency with Montco 2040

It aligns with the Montco 2040 future land use map which classifies Upper Dublin as primarily a suburban residential area with open space and a regional mixed-use center.

What do we mean?

The Future Land Use Map is...

A reflection of the plan’s vision, goals, and actions. The FLUM provides a geographic representation of UD Plan, providing a framework for future zoning ordinance updates.

Conceptual in nature. The FLUM provides general boundaries for different character areas using one-acre hexagonal areas. The conceptual nature is intentional. When the zoning map is updated, a parcel by parcel analysis will be conducted to determine boundaries.

The Future Land Use Map is NOT...

A regulatory document. The FLUM is not a zoning map or an Official Map. It does not impose restrictions on land or property use.

Parcel specific. Since the FLUM is not a zoning map, it does not impose character designations, permitted uses, or bulk and area standards upon specific properties.

What do we know?

Current land use depicts a largely built-out suburban Township.

96% of the land in Upper Dublin Township is currently built out; meaning most of the land is either developed or preserved as open space, with land use remaining largely the same over the past 20 years. The makeup of the Township remains relatively consistent with the suburban character that began to develop in the 1950’s with nearly 60% of the Township being single-family residential lots and absent of any agricultural uses that were dominant in the history of Upper Dublin. The most notable change is in the slight increase in multi-family residential land use (from 1 to 4%).



Land Use Category	2010 Land Use		2024 Land Use	
	Total Acres	Percentage of Acreage	Total Acres	Percentage of Acreage
Single-Family Residential	4,333	57%	4,444	58%
Multi-Family Residential	95	1%	321	4%
Institutional	941	12%	863	11%
Commercial*	656	9%	667	9%
Open Space/Public Recreation	630	8%	647	8%
Private Recreation	308	4%	324	4%
Vacant	323	4%	9	0%
Industrial	185	2%	241	3%
Utility & Road Right-of-Way	115	2%	102	1%
Unclassified*	31	0%	0	0%
Total	7,617	100%	7,617	100%

Zoning regulations enforce large lot single-family dwellings.

The majority of the Township’s land is zoned residential A which provides land for large lot single family dwellings. This major zoning district works alongside the land use to maintain the suburban character of the Township and contributes to the large percent of built out land. However, large single-family homes lead to higher overall property values, making homes in these areas more expensive and potentially limiting affordable housing options for new professionals or options for aging populations.

Development patterns reveal a trend towards mixed-use walkable communities.

Recent development patterns within the Township reveal a slow shift from larger single-family lots into mixed-use multi-unit developments. This move away from the traditional style of housing found in Upper Dublin fosters both fiscal and community health. Mixed-use housing developments help by generating higher tax revenues per acre compared to single-family homes. They attract a diverse range of businesses and residents, increasing property values and promoting economic activity. Additionally, these developments often utilize existing infrastructure more efficiently, reducing the need for new public expenditures on roads and utilities. Mixed-use developments improve the health of a community by fostering a vibrant, walkable environment that encourages physical activity and reduces reliance on cars. They often include amenities like parks, shops, and restaurants within proximity, promoting social interaction and a sense of community. These developments also support diverse housing options, making neighborhoods more inclusive and accessible to various income levels and lifestyles.

Population trends point to demand for a variety of housing types and sizes.

Upper Dublin has experienced little population growth over the past few decades; a trend seen in the greater Philadelphia region.⁵³ Population and household growth in the Township are projected to be relatively flat through 2028. Average household size is projected to remain around 2.7, with slight decreases over time.

⁵³ [U.S. Census. 2000, 2010, 2020, and 2023.](#)



There is a mix of household types and ages throughout the Township, from those just entering the workforce to retired senior households. The diversity in household types requires greater variety in housing options, including options to expand or downsize house size, options to age in place, and options to rent or own at a variety of price points. Incorporating these options into Upper Dublin’s neighborhoods will not change the character of our communities; they will maintain their suburban form and style while offering options that are accessible to a wide range of residents.

Why is this important?

Future land use must serve the residents of Upper Dublin today and tomorrow.

Planning for the future of our communities requires us to consider existing and future residents of the Township. ‘Future residents’ are anyone that will live in Upper Dublin in the coming years, including the people that live here now and will continue to live here. Planning for ‘future residents’ simply means planning for our future as residents in Upper Dublin. We understand that household needs and priorities dynamically change throughout someone’s lifespan. Planning for our futures proactively organizes our community around the needs we know we have today and those we anticipate will come up in the future, such as more housing options that facilitate aging in place.

Community connections rely on well-planned and maintained infrastructure and utilities.

Physical infrastructure and utility networks are the backbone of any community. Without roads, sidewalks, and trails we would be isolated. Utilities provide the services we need to survive, such as electricity and clean water. Planning for the future of Upper Dublin is incomplete without attention to the existing and future needs for infrastructure and utilities. Making the Township more walkable and bikeable, for example, cannot happen without making safety and accessibility improvements to certain roadways. Planning and maintaining infrastructure and utilities is required across all types of land use in the Township.

Future land use is tied to the fiscal sustainability of the Township.

23% of the Township’s budget comes from real estate taxes and 18% of the budget comes from local enabling taxes, such as the Earned Income Tax (EIT) and Local Services Tax (LST). This means that the Township’s ability to fund services and infrastructure depends on land use decisions. During focus groups conducted at the beginning of the UD Plan process, residents expressed concern about the tax burden on households and a desire for the Township to explore ways to diversify the tax base.

Since 96% of the Township is built-out and there is a desire to maintain the existing residential character of the neighborhoods, there is not a lot a lot of land for new development that would contribute to the tax base. However, there is opportunity to redevelop currently underutilized areas, specifically the Greater Fort Washington District and four commercial areas, in the Township, directly new development to those areas so that the residential neighborhoods can be preserved.



The mixed-use place types are suited for development and/or redevelopment based on real estate conditions and market opportunities for retail, office, and residential development.⁵⁴ These opportunities include:

- **Allowing for a greater variety of housing stock in the township could help attract and retain younger adults, who are more likely to rent by choice or financial need, or empty nesters interested in downsizing into smaller, lower-maintenance homes with amenities (e.g., townhouses or condominiums, with single-floor living options).** Largely due to estimated pent-up demand from workers who commute into the township, by 2028, there will be an estimated net demand for approximately 14,072 residential units in the PMA. If buildable residential land were available in the township, 4ward Planning conservatively assumes that the township could have an opportunity to capture between 6% and 10% of pent-up residential demand in the PMA, equivalent to between approximately 844 and 1,407 units by 2028.
- **Underutilized commercial sites could be redeveloped to include mixed-use housing.** The ages of the shopping centers suggest the sites could be near-term redevelopment candidates, whereby multi-family is created as part of an entire shopping center site redevelopment including anchor grocers, restaurants, and personal service shops. While the County has seen negative year-to-date net absorption of retail space (-197,805 square feet), it has a relatively low availability rate (6.2%) compared to the MSA (7.2%) and relatively high asking retail rents (\$21.13) compared to the MSA (\$19.32) - suggesting the County's retail market is relatively strong in terms of occupancy and demand. With just 9% of MSA retail space under construction in the County, there will be little new retail space coming on the market in Montgomery County.
- **New housing in the township could increase its customer base and help attract and support additional food and beverage establishments.** The average household in the PMA spends approximately \$2,230 per year on dining out at full-service restaurants (66% on dinner) and \$2,130 per year on dining out at fast food, takeout, or delivery food establishments, totaling nearly \$4,360 per year on food away from home (53% on dinner). Potential new housing development in the township (e.g., higher-density townhomes or apartment developments, in particular) could increase the township's overall household density and customer base, which could help attract and support more food and beverage establishments.

To understand the service cost-revenue dynamics of the redevelopment mixed-use designed areas in the Future Land Use Map, a fiscal impact analysis was conducted for four development scenarios (large and small scale mixed-use developments and large and small scale residential developments). The full analysis can be found in Appendix F.

⁵⁴ Opportunities are sourced from the Upper Dublin Township Market and Real Estate Analysis by 4Ward Planning, included as Appendix E.



The analysis found that:

- All development scenarios (small and large mixed use developments, and small and large residential developments) resulted in a positive net impact to Upper Dublin Township and the School District.
- With the exception of one scenario (large multi-family scenario), no additional municipal or school personnel are likely to be required.
- If two or more of the redevelopment scenarios were to be undertaken within a two to three-year span, it is likely that additional municipal and school district personnel would be required, in addition to certain capital improvements (e.g., expansion of one or more school buildings).
- The redevelopment scenarios modeled for fiscal impacts do not consider the lost tax revenues and service costs associated with the business operations replaced. However, given the redevelopment density modeled in this analysis, it is more likely than not that the positive fiscal impact from the modeled scenarios would exceed the positive impacts from existing development.

This fiscal impact analysis does not replace the required fiscal impact analysis for new development. It is intended to provide additional context for the mixed-use place types on the Future Land Use Map. Any proposed new development will need to go through the land development process which requires a fiscal impact analysis.

Implementing actions detailed in UD Plan will lead to some land use changes.

This plan details a set of action items that will bring Upper Dublin towards its shared goals, which were developed from community priorities. Implementing these actions will lead to some changes in land use across the Township, and will better connect our neighborhoods to recreational resources, schools and jobs, Township services, retail locations, and more. For example, if the Greater Fort Washington District is developed into a mixed-use area, what is now mostly office parks may include residential, recreational, and retail options. However, note that the actions developed for this plan are largely designed to preserve and enhance the existing character and form of our neighborhoods, which is an essential aspect of Upper Dublin. The Future Land Use Map shows how general character may change in areas of the Township best suited for redevelopment or growth, such as the underutilized shopping center areas and Greater Fort Washington District. By focusing redevelopment and growth in those areas, recreational and natural resources can be preserved, along with the residential character of the existing neighborhoods.

Future Land Use Map & Place Type Designations

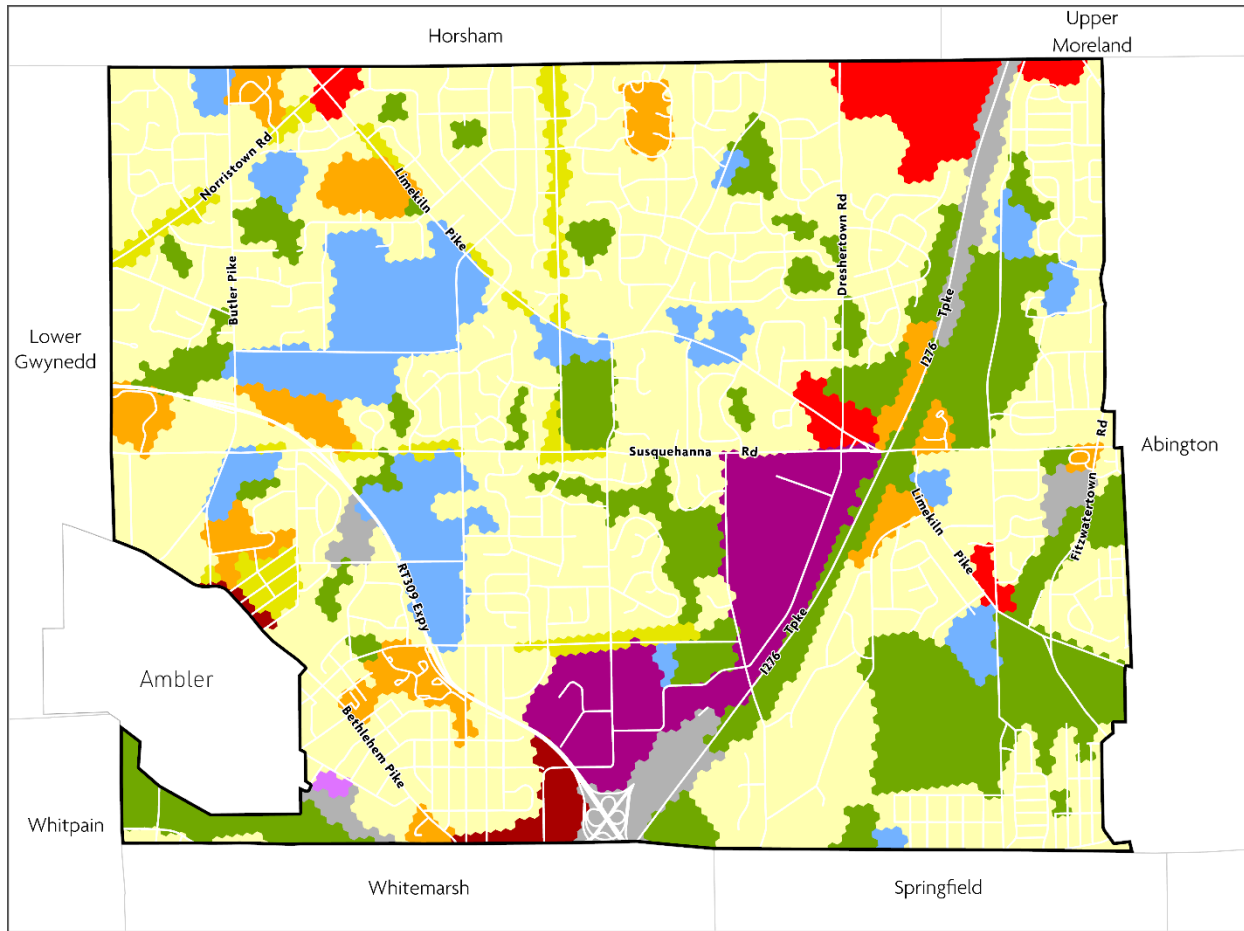
The Future Land Use Map applies the community’s vision geographically. The map is divided into place types, which general character and land uses within an area. This map shows how focused redevelopment in areas best suited for growth can be used to preserve recreational and natural resources and overall residential character of our neighborhoods. Place types included on the Future Land Use Map are described below.

Figure 30: Place Type Categories











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

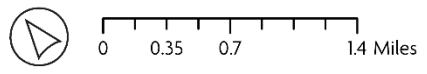
Note: The density/intensity column is included as a conceptual reference point when comparing the place types within their categories. For example, the Residential Neighborhood Place Type will be less dense than the Residential Transition Place Type and the Industrial Place Type will have more intense use than a Community Institution Place Type. However, it is not meant to prescribe specific density regulations or use intensity standards.

Figure 31: Future Land Use Map



Legend

Future Land Use	
	Residential Neighborhoods
	Residential Transition
	Apartment and Townhouse Communities
	Township Centers
	Commercial Corridors
	Regional Activity Center
	Open Space and Recreation
	Community Institution
	Industrial
	Utilities and Public Works Facilities



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 should remain free from development, apart from minimal buildings or structures to support recreational and cultural activities where desired (e.g., trails, restrooms, resting places, playgrounds, etc.). Active uses and structures are located to minimize impact to sensitive environmental features.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: Typically includes recreation facilities, nature centers, restrooms, shelters, maintenance buildings and other structures to support recreational purposes. Building sizes vary depending on the purpose of the building and the setting and are typically low-rise.

Land Uses: Primary uses include public parks, preserved open space and natural land, and recreational facilities.

Mobility: Easily and directly accessible from all places and are located along all street types. Streets leading to these places are designed to encourage safe and comfortable access by all transportation modes. Internal networks of pedestrian and bicycle paths are included in some recreation areas.

Open Spaces: Open space is the primary element of this place type. Can include a wide variety of open space types, such as preserved natural areas, outdoor recreation facilities, community gardens, landscaped areas, and more.



Community Institution

The community institution place type generally consists of either a single large building or multiple adjacent sites providing local residents with cultural, civic, recreational, or educational opportunities. These buildings are often on moderately sized property as uses include libraries, museums, schools, and community centers, like Township buildings. While in the past, these locations within the Township have included many parking spaces, these lots in the future should emphasize pedestrian connectivity allowing residents to walk and bike to these places.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: Building size varies depending on the type of institution and purpose but they are often no larger than five stories. Buildings are oriented toward streets when adjacent or on-site open spaces.

Land Uses: Primary uses include uses that support the community like libraries, government buildings, schools, community centers, and emergency services.

Mobility: Strong walking, biking, and transit connections and located along all street types. Among high concentrations of institutional uses *and open spaces* internal pedestrian networks are prioritized.

Open Spaces: Preservation of open space goes hand in hand with this place type. Green spaces with pervious areas, including lawns, passive landscaped areas, and natural open spaces. Improved open spaces such as courtyards are also important for community building. If green spaces are not included in these place types, lots should remain compact.

Utilities & Public Works Facilities

Utilities and Public Works Facilities are places that provide essential infrastructure support for all place types within the municipality. This place type includes facilities for water, sewer, electricity, government maintenance, and recycling centers. Utility and Public Work Facilities may have negative impacts on nearby residential areas, including noise and air pollution, therefore design and location should be focused on minimizing community impact as much as possible. Oftentimes, these place types fall along major and arterial roads as transportation connections are typically key to operations. Additionally, these sites should be compact and seek to preserve environmental resources and the existing tree canopy as much as possible.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: The typical building style for this place type is compact and often a maximum of two stories. However, these buildings can vary in size and scale depending on the operation taking place.

Land Uses: Land uses include infrastructure and maintenance buildings for several municipal and public utility needs, such as facilities for water, sewer, electricity, government maintenance, and recycling centers.

Mobility: These sites should be located along major roads with safe transit and pedestrian connections for workers and residents trying to get to and through this place type.

Open Spaces: Open space is minimal on these sites as they should be as compact as possible in order to avoid and minimize any environmental degradation. Trees and other plantings may be added as buffering or be a part of the site as a measure taken to preserve trees and forested areas.

Industrial

The industrial place type is characterized by all-scale industrial uses like manufacturing and warehousing and is primarily found along major roadways or railroad corridors, due to possible negative impacts on nearby residential communities. Parcels within the industrial place type are often larger, with buildings placed near the center and surrounded by service areas, outdoor and container storage, and landscape buffers to provide a transition to adjacent uses.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: Building type varies depending on industry type, but a typical building is a high-bay, single-story manufacturing, or warehouse-style building. These buildings can vary in size and scale.

Land Uses: Land uses include light and heavy industrial uses such as manufacturing, research/laboratory facilities, storage and warehousing, wholesale, etc.

Mobility: Locations of industry are accessible by higher capacity transportation facilities, such as arterials, interstates, and freight rail. Depending on building type, these places may require clearance for larger truck traffic or rail access. Other considerations include continued sidewalk connectivity through the place type and transit access for potential workers needed on-site.

Open Spaces: Industrial uses should plant additional trees and vegetation both as buffers and as potential green infrastructure measures. Additionally, the preservation of existing trees and other environmental features is key to minimizing environmental impacts.

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 neighborhoods. Neighborhoods surround all 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

Building Form: Many of the individual neighborhoods have unifying characteristics, such as setbacks and building heights, that have been maintained as they were originally developed. A common characteristic in Upper Dublin is each home having a front lawn and/or back yard. Typical buildings are single-family residential building up to 2 or 3 stories. Townhouses can have several units depending on size and context. The size of civic and institutional buildings varies based on context and accessibility. Development is 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 residents nearby connections to goods and services. Housing mix includes small apartments, condominiums, townhouses, senior residences, single-family homes, duplexes, accessory dwelling units and tiny homes. Other uses include neighborhood-scale community institutions, such as day cares or churches, but commercial activities within neighborhoods are limited.

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

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



Residential Transition

The Residential Transition place type allows for a transition between major corridors in the Township and the Residential Neighborhoods. Residential Transition place types are residential areas that front a major corridor or are located near a Commercial Corridor place type. These areas are primarily residential; however, some low-impact retail uses may be permitted to provide services and amenities within proximity to the Residential Neighborhoods.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: Buildings have a setback that accommodates a small front lawn. They are two-three stories in height. Multi-family buildings have vertical articulation to visually break down long, continuous building facades.

Land Uses: Land uses primarily include single-family, two-family, townhouse, and medium scale multi-family (no more than 12 units). Low-impact retail and offices uses may also be found in this place type, such as a coffee shop, accounting/tax office, hobby store, etc.

Mobility: Residential Transition place types are located along high-volume streets or close to Commercial Corridors. Streets are designed to support efficient circulation while accommodating safe pedestrian mobility via a sidewalk network. Parking is located in the rear or on the side of the building.

Open Spaces: Private yards and improved common areas are typical green spaces in this place type. Landscaping and street trees along the sidewalk network contribute to the green space in the place type and provides a buffer from the road.

Apartment & Townhouse Communities

Apartment and townhouse communities are primarily residential areas, providing a range of moderate to higher density housing types, including low- and mid-rise apartments or townhouses, in a walkable environment. These communities may include civic and institutional uses similarly to residential neighborhoods, and they can include shared community amenities, such as open spaces or recreational facilities and common parking areas. Communities are connected to nearby parks and open spaces, and goods and services in township centers. Small parks, community gardens, and trails can be found throughout these communities, connecting residents to nearby destinations. Apartment and townhouse communities may evolve from existing multi-family communities or sites suitable for infill development of multiple buildings.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: The typical buildings are low- to mid-rise apartments or townhouses. Civic and institutional buildings vary in size based on context and accessibility. Buildings orient to streets with prominent entrances providing pedestrian access from the public sidewalk, or toward on-site open spaces and abutting parks and greenways.

Land Uses: Primary uses are multi-family residential. Lower intensity housing types may also be found here depending on context. Apartment and townhouse communities can also include civic uses such as schools, parks, and religious institutions nearby, similarly to how those are incorporated into residential neighborhoods.

Mobility: Apartment and townhouse communities have well connected street networks designed for pedestrian and bicycle safety and access. These allow people to travel within their communities and to nearby goods and services, such as parks and open spaces, schools, or commercial areas.

Open Spaces: Apartment and townhouse communities typically have privately owned, common open space that serves individual residential developments. It can take a range of forms, including playgrounds, dog parks, recreation spaces, plazas, courtyards, and rooftop decks. These communities should also have public open spaces such as small parks and greenways, and access to nearby natural recreational resources.



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. The Cross-County Trail will provide opportunities to connect these Township Centers.

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.

Maple Glen Coordination: Upper Dublin Township should continue to coordinate with Horsham Township regarding land use patterns in the Maple Glen Township Center. Coordination is ongoing between the Township's regarding proposed development and PennDOT improvements.



Commercial Corridor

Commercial Corridors provide for retail and upper floor residential uses along major corridors. They provide a buffer from busy corridors and the surrounding residential neighborhoods. These place types provide residents and visitors (driving on the corridor or walking from the train station) access to goods, services, and dining. This place type is characterized by a mix of single-story and multi-story buildings with adequate buffering between the corridor and sidewalk network. While this place type can accommodate auto-oriented uses, the design of the building, access to the site, and parking at the rear of the building supports walkability.

Illustrative Examples of Place Type



Place Type Characteristics

Building Form: Buildings are situated near the sidewalk, but setback from the street and buffered by the sidewalk and tree lawn. This allows for parking lots in the rear of the buildings. Entrances are located on the street facing side of the building to provide pedestrian access from the sidewalk.

Land Uses: Land uses include standalone retail uses, hotels, restaurants, multi-family residential, and some office.

Mobility: Commercial Corridors are located along high-volume streets that experience thru-traffic. Streets are designed to support efficient circulation while accommodating safe pedestrian mobility. Parking is located in the rear or on the side of the building.

Open Spaces: Commercial Corridors can have smaller open spaces integrated into site development, such as a pocket park or courtyard. Landscaping and street trees along the sidewalk network contribute to the green space in the place type and provides a buffer from the road.

Transit-Oriented Development Opportunity:

The Commercial Corridor is adjacent to the Fort Washington Train Station. It is suitable for transit-oriented development. Action CC2.B recommends integrating transit-oriented principles into zoning district for the district along this corridor.

Regional Activity Center

The Regional Activity Center is the place type for the Greater Fort Washington District. This area is meant to be a walkable, sustainable area with a variety of uses. The variety of uses, including commercial, residential, institutional, public and private recreational, office, and light industrial, are meant to serve residents within the area creating a “work-live-play” neighborhood, as well as the wider Township and surrounding communities. This place type puts emphasis on building form that encourages an active street frontage (minimal setbacks, ground floor commercial, etc.). The vibrancy of the street is enhanced by streetscaping that accommodates pedestrians and cyclists while providing for the circulation of vehicles towards parking lots that are situated at the rear of the building. Signage, landscaping, and street furniture create a cohesive area identity. Furthermore, the area is supported by a robust stormwater management network of green infrastructure which address infrastructure needs while contributing to the landscaping of the area.

Illustrative Example of Place Type



Place Type Characteristics

Building Form: Buildings are situated close to the sidewalks to activate the pedestrian network. Heights varying from two-stories to six-stories throughout the area, with higher heights permitted near the turnpike, creating a buffer. Buildings have well-articulated facades and rooflines. There are a mix of building footprints depending on use; however, together the buildings create a coherent district.

Land Uses: Land uses include commercial, residential, institutional, public and private recreational, office, and light industrial. Ground floor commercial is encouraged in mixed-use buildings with residential or office on the upper floors.

Mobility: This place type encourages multi-modal transportation within the area. There are protected bike lanes, trails, and wide sidewalks buffered with landscaping. Signage, streetscaping, and complete street design slows vehicle speeds. A “park once” environment is created through a series of parking lots at the rear of buildings that are connected to the pedestrian network.

Open Spaces: Open space is integrated into this place type as part of the green infrastructure stormwater management network and to provide public gathering spaces, such as public plazas, pocket parks, and event lawns. Landscaping along the road and trail network provides a network of green spaces throughout the place type.

IMPLEMENTATION



To support the implementation of UD Plan, this chapter provides a detailed implementation framework for each goal and associated actions, as well as a monitoring and evaluation guide for the comprehensive plan. This chapter will serve as the compass, guiding Township decision makers, staff, partners, and community members on how to accomplish the vision of UD Plan.

Implementation Framework

This implementation framework outlines a tactical approach for advancing each of the goals and associated actions within the focus areas. The framework includes:

Goal Outcomes

An elaboration on what is being accomplished through the goal.

Key Action Details

- **Type:** The type of action being taken, such as:
 - Policy: A change in existing or a new policy, such as specific requirements for operations and management.
 - Program: A short or long-term initiative that requires staff effort and/or funding that will result in information sharing or a newly established system for coordination.
 - Study/Plan: The action calls for a detailed study or plan to determine next steps.
 - Infrastructure Upgrade: The action calls for the implementation of a physical improvement.
- **Milestones:** These are suggested milestones that should be reached while implementing the action. They provide suggested steps in implementation.
- **Lead and Partners:** The parties responsible for implementation. Partners can include organizations, governments, and other stakeholders. The lead will be a Township body, such as a Board, Commission, or department. In all cases, the Township's Board of Commissioners sets the priorities for implementation and provides direction to Township staff. In almost all cases, the lead is the Township.
- **Funding Sources:** Potential funding sources have been identified for each action. The inclusion of funding sources does not mean that the funds have been earmarked or secured.
- **Time Frame:** The time frame for implementation:
 - Short: 0-2 years
 - Medium: 3-5 years
 - Long: 5+ years
- **Outputs:** Specific outputs that can be used to measure progress towards the action.
- **Status:** Status of implementation (not started, in-progress, or complete).

Note: The numerical order of the goals and key actions does not infer implementation priority. Priority will be established by the Board of Commissioners. Additionally, some of these actions are already underway. A "status" column will be added to the tables in the final draft plan to indicate the status of the actions (Not Started, In Progress, etc.).



Monitoring and Evaluation

Monitoring and evaluation are key to implementation because they allow the Township to evaluate the progress toward the community’s vision and respond to changing trends or funding availability. The plan should be monitored and evaluated in the following ways:

Everyday Accessibility

UD Plan will live on a user-friendly website. Any progress made on the plan should be updated on the website in the “Implementation” tab. A printed copy of UD Plan should also be made available at the UD Library and Township Building upon request for those who cannot or do not access the internet. Other sites where publicly available print copies of the plan should be located include UD School District school libraries and the Temple-Ambler Library, so local students have access. Additionally, the Township should use its existing social media channels to publish regular updates on UD Plan such as monthly or quarterly updates that highlight implementation progress in a digestible manner.

Township Decision Making

To keep UD Plan’s vision, guiding principles, goals, and actions forefront in Township decision making, specific goals (i.e., the outcomes of UD Plan) can be noted when making recommendations for approval or denial of agenda items to ensure consistency between legislative action and the plan.

Focused Annual Reviews

Every Township entity identified as a lead for an action should conduct an annual review of their “assigned” actions. The annual review should include an update on any progress made towards the action, barriers to implementation, and next steps. The Focused Annual Reviews should be sent to the Board of Commissioners. If updates to the plan are identified, updates will be made via amendment to the plan by the Board of Commissioners.

Budget Alignment

In advance of the annual budgeting process, the Board of Commissioners should consider the Focused Annual Reviews from the action leads and aim to align the budget with identified implementation priorities.

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	STATUS
Infrastructure Upgrade	AN 1.A Improve safety conditions for all roadway users across the Township.	<ul style="list-style-type: none"> • Roadway assessment. • Detailed site surveying. • Cost estimates. • Approval for funding and construction. 	<ul style="list-style-type: none"> • UDT Engineer (Lead) • UDT Parks & Recreation • UDT Public Works • UDT Community Planning & Zoning 	<ul style="list-style-type: none"> • DVRPC Transportation and Community Development Initiative (TCDI) • Private developers 	Long	<ul style="list-style-type: none"> • Roadway assessment findings. • Site designs. • Cost estimates. • Completed safety improvements. 	In-Progress
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"> • Update Missing Connections map. • Detailed site surveying. • Cost estimates. • Approval for funding and construction. 	<ul style="list-style-type: none"> • UDT Parks & Recreation (Lead) • UDT Engineer • UDT Public Works • UDT Community Planning & Zoning 	<ul style="list-style-type: none"> • PennDOT and DVRPC Transportation Alternatives Set Aside (TASA) • DVRPC Competitive Congestion Mitigation and Air Quality Improvement Program (CMAQ) • Commonwealth Financing Agency (CFA) Multimodal Transportation Fund • PA Department of Health (DOH) WalkWorks • AARP Community Challenge Grant • Private developers • DCNR C2P2 • DCED Greenways • Trails and Recreation Program • Montco 2040 Implementation Grant Program 	Medium to Long	<ul style="list-style-type: none"> • Updated Missing Connections map. • Site designs. • Cost estimates. • Built connections. 	In-Progress
Policy	AN 1.C Provide streetscaping and beautification improvements along key neighborhood corridors.	<ul style="list-style-type: none"> • Develop design guidelines. • Approval from Board of Commissioners. • Incorporate guidelines into development review. 	<ul style="list-style-type: none"> • UDT Engineer (Lead) • UDT Public Works • UDT Community Planning & Zoning • UDT Planning Commission 	<ul style="list-style-type: none"> • PA DOH WalkWorks • Commonwealth Financing Agency (CFA) Multimodal Transportation Fund • AARP Community Challenge Grant 	Medium to Long	<ul style="list-style-type: none"> • Streetscaping design guidelines. • Adoption resolution. 	Not Started

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Program	AN 1.D Establish a bike training and access program.	<ul style="list-style-type: none"> Establish program task force. Develop program report. Coordinate with stakeholders for approval and funding. Implement program. 	<ul style="list-style-type: none"> UDT Community Planning & Zoning (Lead) UDT Public Works MCPC DVRPC GVF-TMA 	<ul style="list-style-type: none"> PA DOH WalkWorks DVRPC CMAQ Commonwealth Financing Agency (CFA) Multimodal Transportation Fund AARP Community Challenge Grant DVRPC TCDI 	Long	<ul style="list-style-type: none"> Bike training and access program report. Established program. Reduction in vehicle trips. 	Not Started

DRAFT

Accessible Neighborhoods Implementation Framework (Continued)



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

OUTCOMES
<ul style="list-style-type: none"> • Ordinances and codes that facilitate development needed to provide a variety of housing types. • Resources and programs that help keep residents in their homes. • Met housing needs for residents.

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy	AN 2.A Adopt a zoning ordinance with form-based zoning principles.	<ul style="list-style-type: none"> • Review and update zoning ordinance. • Distribute updated ordinance internally for review. • Present the ordinance to the Board for approval. • Administer the policy. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • UDT Board of Commissioners (BOC) • UDT Planning Commission 	n/a (Zoning Ordinance Update has already been funded)	Short	<ul style="list-style-type: none"> • Updated zoning ordinance. • Reduction in number of sought variances. 	Not Started
Policy	AN 2.B Encourage residential development proposals that incorporate missing middle housing types and affordable options.	<ul style="list-style-type: none"> • Conduct stakeholder and public engagement. • Develop missing middle incentive policy. • Present policy to the Board for approval. • Administer the policy. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • UDT Board of Commissioners (BOC) • UDT Planning Commission 	Operations Budget (Staff Time)	Short to Medium	<ul style="list-style-type: none"> • Missing Middle Housing Incentive Policy. • Increase in number of land development applications and permits for missing middle housing types. 	Not Started
Program	AN 2.C Connect residents to a funding program to support housing maintenance and repairs.	<ul style="list-style-type: none"> • Compile resources. • Develop educational materials. • Distribute materials through community contacts. • Develop report on potential for low-cost loan assistance program for historic property maintenance. Present report to the Board. 	<ul style="list-style-type: none"> • UDT Code Enforcement (Lead) • UDT Community Planning & Zoning 	Operations Budget (Staff Time)	Short	<ul style="list-style-type: none"> • Educational materials on housing maintenance and repair programs. • Report on low-cost loan assistance program for historic property maintenance. 	Not Started

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy	AN 2.D Maintain and protect existing Historic Resources.	<ul style="list-style-type: none"> Update historic ordinance (with Action AN 2.A). Maintain historic resources in PA-SHARE. Identify potential funding opportunities. 	<ul style="list-style-type: none"> UDT Historical Commission (Lead) UDT Community Planning & Zoning UDT Board of Commissioners (BOC) 	Operations Budget (Staff Time)	Short to Medium	<ul style="list-style-type: none"> Updated Historic Ordinance. 	Not Stated
Program	AN 2.E Review and update permitting processes for residential renovations and repairs.	<ul style="list-style-type: none"> Establish permitting process review working group. Identify permitting challenges and solutions. Develop recommendations report and present to the Board for approval. 	<ul style="list-style-type: none"> UDT Community Planning & Zoning (Lead) UDT Historical Commission UDT Code Enforcement UDT Engineering UDT Public Works Homeowners Contractors Developers 	Operations Budget (Staff Time)	Short	<ul style="list-style-type: none"> Temporary working group. Updated permitting processes. Decrease in permit processing time from start to finish. 	In-Progress
Program	AN 2.F Education on permitting processes.	<ul style="list-style-type: none"> Develop educational materials detailing permitting processes. Present materials to the permitting process review working group for feedback. Revise materials as needed. Post the document on the Township website. 	<ul style="list-style-type: none"> UDT Community Planning & Zoning (Lead) UDT Historical Commission UDT Code Enforcement UDT Communications & Public Information 	Operations Budget (Staff Time)	Short	<ul style="list-style-type: none"> Educational materials on Township permitting processes. 	Not Started

Vibrant & Connected Communities Implementation Framework



CC GOAL 1: Cultivate neighborhood hubs.

OUTCOMES
<ul style="list-style-type: none"> • More third spaces (i.e., gathering spaces that are not work or home) located within a ten-minute walk of all residences. • Strengthened connections between neighbors.



TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy	CC 1.A: Permit small, low-impact, neighborhood-serving retail uses in portions of residential districts along main corridors.	<ul style="list-style-type: none"> • Define boundaries of the Neighborhood Corridor District. • Determine permitted uses, conditional uses, and nonpermitted uses for the District. • Incorporate the District and use permissions into the zoning ordinance and map update. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • UDT Planning Commission 	n/a (Zoning Ordinance Update has already been funded)	Short	<ul style="list-style-type: none"> • Zoning ordinance that includes a designated Neighborhood Corridor District. • More physical spaces for small businesses to operate within the Township. • Reduction in number of vehicle trips. 	Not Started
Program; Infrastructure Upgrade	CC. 1.B: Develop a neighborhood placemaking grant to encourage and fund beautification, streetscaping, and community building in neighborhoods and around community amenities.	<ul style="list-style-type: none"> • Convene institutional and non-profit partners and Township boards and commissions to discuss establishment of a placemaking grant fund or strategies for utilizing existing grants. • Establish application criteria. • Establish process for application review and ensure compliance with existing codes. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning and Parks & Recreation (Leads) • UDT Shade Tree Commission • UDT Historical Commission • UDT Planning Commission • UD Library • Temple-Ambler 	<ul style="list-style-type: none"> • Montco 2040 Implementation Grant Program • National Endowment for the Arts (NEA) Our Town Grants • AARP Community Challenge Grant • Private developers 	Medium	<ul style="list-style-type: none"> • Physical improvements (e.g., signage, trees, benches, vegetation, etc.). 	Not Started

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Program; Infrastructure Upgrade	CC 1.C: Invest in upgrades to North Hills Community Center and celebrate its historic and cultural significance.	<ul style="list-style-type: none"> Discuss immediate maintenance needs and future needs with North Hills residents and organization partners. Allocate capital budget to maintenance and improvements. Once the budget is approved, share the capital improvement plans with the North Hills community. Host a discussion in North Hills with the Historic Commission. 	<ul style="list-style-type: none"> Facilities Director (Lead) UDT Parks & Recreation UDT Historical Commission UDT Community Planning & Zoning UD Library North Hills Collective 	<ul style="list-style-type: none"> Montco 2040 Implementation Grant Program Private developers 	Short to Medium	<ul style="list-style-type: none"> Addressed maintenance log. List of physical improvements for inclusion in budget. Increase in understanding regarding the historic resources inventory and historic preservation opportunities (people in attendance at a community conversation on historic preservation). 	Not Started
Infrastructure Upgrade	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.	<ul style="list-style-type: none"> Reference Appendix C of the Open Space Plan for the Properties of Interest Prioritization and Prioritization Worksheet. Acquire properties, conservation easements, and access easements to protect the identified Properties of Interest. Evaluate the prioritization list following acquisition of a property of interest to determine impact (if any) on prioritization of remaining properties. 	<ul style="list-style-type: none"> UDT Parks & Recreation (Lead) 	<ul style="list-style-type: none"> Montco 2040 Implementation Grant Program PA Department of Conservation and Natural Resources (DCNR) Community Conservation Partnerships Program (C2P2) PA DCNR Community Recreation and Conservation Funding DCED Greenways, Trails, and Recreation Program Private developers 	Medium to Long	<ul style="list-style-type: none"> Reduction in number of residences not served by a park within a 10-minute walk. 	In-Progress
Program	Continue investing in the Upper Dublin Township Library as a community hub.	<ul style="list-style-type: none"> Continue to convene community events in the library's indoor and outdoor spaces. Pilot new events to garner community interest (e.g., food trucks). Explore ways to enhance the library's outdoor space. 	<ul style="list-style-type: none"> UDT Library (Lead) UDT Parks & Recreation 	<ul style="list-style-type: none"> Montco 2040 Implementation Grant Program National Endowment for the Arts (NEA) Our Town Grants AARP Community Challenge Grant 	Short	<ul style="list-style-type: none"> Increase attendance at community events. Increased diversity of attendees at community events. Strengthening the library's position as a community hub. 	In-Progress

Vibrant & Connected Communities Implementation Framework *(Continued)*



CC GOAL 2:

Invest in community-serving commercial and mixed-use districts.

OUTCOMES
<ul style="list-style-type: none"> • A walkable, mixed-use, destination district (GFW). • Connected, mixed-use neighborhood-serving districts (the existing shopping centers) • Increase in service and amenity offerings within the Township (and increase of tax base). • Decreased reliance on vehicle trips to access services and amenities.

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy; Infrastructure Upgrade	CC 2.A: Develop focused and phased improvement plans for neighborhood shopping centers.	<ul style="list-style-type: none"> • Phase 0: Review existing zoning overlays and design standards. • Phase I: Install sidewalks to connect commercial districts with surrounding residential neighborhoods. • Phase II: Invest in streetscaping and beautification around the commercial areas to create a sense of place. • Phase III: Work with property owners to incentivize façade upgrades. • Phase IV: Site redevelopment. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • Developers • Local businesses 	<ul style="list-style-type: none"> • Montco 2040 Implementation Grant Program • Private developers 	Medium to Long	<ul style="list-style-type: none"> • Updated zoning regulations. • Increased walkability surrounding the commercial districts. • More enjoyable human-oriented (rather than auto-oriented) spaces. • Introduction of residential units. • Stronger retail environment. 	Not Started
Policy	Action CC 2.B: Incorporate transit-oriented development along Pennsylvania Avenue to create a corridor with services and amenities for residents and commuters.	<ul style="list-style-type: none"> • Incorporate transit-oriented development principles into the zoning ordinance rewrite for the Pennsylvania Avenue area. • Integrate the Cross County Trail into transit-oriented development. • Identify principles that would be better suited for the Subdivision and Land Development Ordinance (SALDO). • Modify the SALDO. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • UDT Planning Commission • UDT BOC 	n/a (Zoning Ordinance Update has already been funded)	Short	<ul style="list-style-type: none"> • Zoning district standards for the Pennsylvania Avenue area. • Increase in human-scale, contextual, and transit-oriented development along Pennsylvania Avenue. 	Not Started

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy; Infrastructure Upgrade	Action CC 2.C: Develop a phased implementation approach to creating a mixed-use, walkable Greater Fort Washington District.	<ul style="list-style-type: none"> Phase 0: Review of existing land use regulations. Phase I: Catalytic Area Master Plans Phase II: Adaptive Reuse. Phase III: Redevelopment. 	<ul style="list-style-type: none"> Municipal Authority (Lead) UDT Community Planning & Zoning Developers Local businesses 	<ul style="list-style-type: none"> Montco 2040 Implementation Grant Program Municipal Authority Private developers 	Short to Long	<ul style="list-style-type: none"> Updated zoning regulations. Area Master Plans to attract additional investment. Adaptive reuse of sites. Redevelopment of catalytic sites within the GFW. 	In-Progress
Policy	Action CC 2.D: Implement a TDM ordinance to help manage traffic impacts of new development.	<ul style="list-style-type: none"> Consult with the GVF-TMA on the development of a TDM ordinance based on the Fort Washington TDM Plan. Determine regulations for TDM ordinance: requirements and/or incentives and applicability (size of land development, number of trips generated, location, etc.). Determine incentives for opt-in regulations. Present ordinance for adoption to the Board. Provide educational information on the TDM ordinance to property owners and developers. 	<ul style="list-style-type: none"> UDT Community Planning & Zoning (Lead) UDT Engineering GVF-TMA Local employers Local property managers and developers 	<ul style="list-style-type: none"> DVRPC CMAQ DVRPC TCDI 	Short	<ul style="list-style-type: none"> TDM ordinance. Engaged businesses (number of businesses, property owners, developers, etc. that participate in the program). Reduction in vehicle trips. Increase in number of bicycle or pedestrian trips. 	Not Started

Vibrant & Connected Communities Implementation Framework *(Continued)*



CC GOAL 3: Support and encourage local business.

OUTCOMES
<ul style="list-style-type: none"> • Home-grown network of local businesses serving the retail and service needs of Upper Dublin residents. • Increase in the Township's tax base. • Economic opportunity for Township residents and business owners.

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy	Action CC 3.A: Identify barriers to home-based businesses in the existing zoning ordinance.	<ul style="list-style-type: none"> • Review home-based business use definition and regulations during zoning ordinance and map update. • Include more flexible regulations for conversions, parking, operating hours, and use types for home-based business. • Monitor variance cases every two years to identify if any additional barriers exist. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • UDT Planning Commission 	n/a (Zoning Ordinance Update has already been funded)	Short	<ul style="list-style-type: none"> • Increase in number of home-based businesses in Township. • Diversity of tax base. 	Not Started
Program	Action CC 3.B: Connect local businesses with existing Township institutions for recruitment and job training.	<ul style="list-style-type: none"> • Collaborate with Montgomery County, UD School District, Temple-Ambler, and the EMCCC on content for a local business brochure. • Produce the brochure. • Share the brochure with new and existing businesses. • Solicit "success stories" from local businesses to monitor connections made. 	<ul style="list-style-type: none"> • UDT Community Planning & Zoning (Lead) • Eastern Montgomery County Chamber of Commerce • Montgomery County Business Services Team • Temple-Ambler • UD School District • Local businesses 	Operations Budget (Staff Time)	Short to Medium	<ul style="list-style-type: none"> • Ongoing connections between existing and new businesses and institutional/organization partners. 	Not Started

Adaptive & Resilient Environment Implementation Framework



RE GOAL 1:
Build environmental sustainability and resiliency.

OUTCOMES
<ul style="list-style-type: none"> • Decreased risk to extreme heat events. • Decreased flood risk. • Improved water quality. • Township transition to renewable energy sources. • Use of more sustainable practices by the Township.

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Program	RE 1.A Continue investing in the Township tree canopy to reduce risk to extreme heat.	<ul style="list-style-type: none"> • Survey priority areas. • Develop list of priority planting locations. • Choose locations from priority list for annual plantings. • Resurvey priority areas after five years. 	<ul style="list-style-type: none"> • UDT Parks & Recreation (Lead) • UDT Shade Tree Commission 	<ul style="list-style-type: none"> • Montco 2040 Implementation Grant Program • PA DCNR Community & Watershed Forestry Program 	Medium to Long	<ul style="list-style-type: none"> • Priority Tree Planting Location List. • Annual Tree Planting Program Planting Location Lists. • Increase in tree canopy coverage. • Reduction in heat island effect. 	In-Progress
Program	RE 1.B Continue participation in the Wissahickon Clean Water Partnership and implement the Water Quality Improvement Plan.	<ul style="list-style-type: none"> • Pass resolution to implement projects and policies from the plan. • Develop implementation matrix. • Assign projects and policies to respective leads. • Evaluate outcomes annually. 	<ul style="list-style-type: none"> • UDT Township Manager (Lead) • UDT Community Planning & Zoning • UDT Engineering • UDT Public Works • UDT Parks & Recreation 	Operations Budget (Staff Time)	Short to Medium	<ul style="list-style-type: none"> • Plan adoption resolution. • Implementation Matrix. • Annual evaluations. 	In-Progress
Study/Plan	RE 1.C Conduct and implement a stormwater and stormwater facilities study and evaluate stormwater management improvements.	<ul style="list-style-type: none"> • Conduct stormwater study. • Present study to the Board. • Coordinate project implementation as needed. • Evaluate outcomes annually. 	<ul style="list-style-type: none"> • UDT Engineering (Lead) • UDT Public Works • Municipal Authority • UDT Parks & Recreation 	PA DEP Growing Greener Plus	Medium	<ul style="list-style-type: none"> • Comprehensive Flood Hazard Study. • Annual evaluations. • Reduction in flood events. 	In-Progress

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy	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.	<ul style="list-style-type: none"> Develop Official Map and Ordinance in coordination with Township departments. Present Official Map and Ordinance to the Board for approval. 	<ul style="list-style-type: none"> UDT Community Planning & Zoning (Lead) UDT Engineering UDT Public Works UDT Parks & Recreation 	Montco 2040 Implementation Grant Program	Short	<ul style="list-style-type: none"> Official Map. 	Not Started
Program	RE 1.E Continue to review and update floodplain and stormwater management ordinances to reduce flood risk in the Township.	<ul style="list-style-type: none"> Develop plan to review ordinances. Review ordinances at regular frequency. Present updates to the Board for approval as needed. 	<ul style="list-style-type: none"> UDT Engineering (Lead) UDT Public Works UDT Parks & Recreation 	<ul style="list-style-type: none"> PA DCNR Community & Watershed Forestry Program PA DEP Growing Greener Plus 	Short	<ul style="list-style-type: none"> Ordinance review plan. Updated floodplain and stormwater management ordinances (as needed). Reduction in flood events. 	In-Progress
Program	RE 1.F Implement recommendations identified in the Renewable Energy Transition Plan for Upper Dublin Township Municipal Operations.	<ul style="list-style-type: none"> Develop and fill a Township Energy Manager role. Develop implementation plan for the Renewable Energy Transition Plan. Produce annual report evaluating progress and outcomes. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT Energy Manager (Proposed Staff Role) UDT Public Works UDT Parks & Recreation 	<ul style="list-style-type: none"> PA Department of Environmental Protection (DEP) Local Climate Action Program 	Short to Long	<ul style="list-style-type: none"> Township Energy Manager staff role. Implementation plan. Annual evaluations. Reduction in Township's carbon footprint. 	In-Progress
Program	RE 1.G Implement recommendations identified in the 2022 Montgomery County Hazard Mitigation Plan.	<ul style="list-style-type: none"> Develop plan implementation matrix. Assign projects and policies to respective Township leads. Evaluate and report on outcomes annually. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT Public Works UDT Parks & Recreation 	<ul style="list-style-type: none"> Montco 2040 Implementation Grant Program PA DCNR Community & Watershed Forestry Program PA DEP Growing Greener Plus 	Long	<ul style="list-style-type: none"> Implementation matrix. Annual evaluations. 	In-Progress
Program	RE 1.H Pursue Gold Sustainable PA certification.	<ul style="list-style-type: none"> Evaluate certification parameters. Work to pursue additional parameters to reach Gold certification. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT Energy Manager (Proposed Staff Role) UDT Parks and Recreation UDT Public Works 	Operations Budget (Staff Time)	Short to Medium	<ul style="list-style-type: none"> Gold Sustainable PA certification showing continued commitment to sustainability. 	In-Progress

Adaptive & Resilient Environment Implementation Framework (Continued)



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

OUTCOMES
<ul style="list-style-type: none"> Engagement of community in environmental programs. Wider use of environmentally sustainable practices.

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Program	RE 2.A Implement a Sustainable Property Program.	<ul style="list-style-type: none"> Develop program guidelines. Create educational materials. Present program to the Board. Distribute materials through community contacts. 	<ul style="list-style-type: none"> UDT Environmental Protection Advisory Board (EPAB) (Lead) 	Operations Budget (Staff Time)	Short	<ul style="list-style-type: none"> Sustainable Property Program guidelines and requirements. Informational program materials. Engages residents (program participants). Increase in number of residents applying sustainable site techniques to their property. 	Not Started
Program	RE 2.B Establish a “Green Points” Green Building Incentive Program for property owners.	<ul style="list-style-type: none"> Develop program guidelines. Create educational materials. Present program to the Board. Distribute materials through community contacts. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT BOC UDT Community Planning & Zoning UDT Code Enforcement UDT EPAB 	Operations Budget (Staff Time)	Medium	<ul style="list-style-type: none"> Green Building Program guidelines and requirements. Informational program materials. Engages residents (program participants). Increase in number of residents applying sustainable site techniques to their property. 	Not Started
Program	RE 2.C Provide incentives for developments that meet or exceed a specific LEED or Energy Star rating.	<ul style="list-style-type: none"> Develop program guidelines. Create educational materials. Present program to the Board for a resolution adoption. Administer the program. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT BOC UDT Community Planning & Zoning UDT Code Enforcement UDT EPAB 	Operations Budget (Staff Time)	Medium	<ul style="list-style-type: none"> Building Energy Incentive Program requirements and parameters. Increase in number of buildings with LEED or Energy Star ratings. 	Not Started

TYPE	ACTION	MILESTONES	LEAD & PARTNERS	FUNDING SOURCES	TIME FRAME	OUTPUTS	STATUS
Policy	RE 2.D Review Township ordinances to ensure they promote environmentally sustainable practices.	<ul style="list-style-type: none"> Review Township ordinances where sustainable practices can be promoted. Coordinate with stakeholders to update the ordinances to better promote sustainable practices. Present any proposed updates to the BOC for approval. Administer updated policies. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT BOC UDT Community Planning & Zoning UDT Engineering UDT Code Enforcement UDT EPAB 	Operations Budget (Staff Time)	Short to Medium	<ul style="list-style-type: none"> Updated ordinances (as needed). Increase in number of residents participating in the ordinance activities. 	Not Started
Program	RE 2.E Position the Township as a champion of environmental stewardship that guides residents and businesses in energy sources and usage.	<ul style="list-style-type: none"> Develop public awareness plan. Host educational events. Share information through community contacts. 	<ul style="list-style-type: none"> UDT Township Manager (Lead) UDT Energy Manager (Proposed Staff Role) UDT EPAB UDT Communications & Public Information 	Operations Budget (Staff Time)	Short	<ul style="list-style-type: none"> Public Awareness Plan. Educational Programming. 	Not Started

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APPENDICES



Appendix A: Community Development Objectives

Following the adoption of UD Plan, Upper Dublin Township will update their zoning ordinance to reflect the plan. It is also recommended that the Subdivision and Land Development Ordinance (SALDO) be reviewed for consistency with UD Plan, and amended, if necessary, to further the land use recommendations of the plan. UD Plan sets the vision for the next decade of growth, enhancement, and preservation, but is not legally binding, whereas the zoning ordinance and SALDO provide regulatory muscle. The MPC requires that zoning ordinances reflect the policy goals of the municipality as outlined in a statement of community objectives that can reference the comprehensive plan.

Below is a list of community development objectives, based on the recommendations throughout UD Plan, that can be integrated into the updated zoning ordinance.

Neighborhoods

- Prioritize housing that meets the varying needs of all existing and future community members, including variety in housing type, tenure, size, and affordability.
- Encourage residential missing middle housing types (i.e., duplexes, triplexes, quadplexes, etc).
- Respect existing neighborhood built form and utilize form-based design standards for new development.
- Maintain and protect existing historic resources.

Community-Serving Districts

- Invest in community-serving commercial and mixed-use districts.
- Permit small, low-impact, neighborhood-serving retail uses in portions of residential districts along main corridors.
- Develop the neighborhood shopping centers into more walkable, vibrant community hubs.
- Incorporate the Community Vision for Fort Washington Village into land use regulations.
- Continue working towards a mixed-use, walkable Greater Fort Washington District.

Environment

- Continue investing in the Township tree canopy to reduce risk to extreme heat.
- Review the Township's ordinance regarding lawn mowing and yard maintenance.
- Provide incentives for developments that meet or exceed a specific LEED or Energy Star rating.
- Protect and maintain existing parks, recreation, and open spaces.



The Public Realm & Transportation

- Create safe and accessible multi-modal connections.
- Fill gaps and resolve barriers in the pedestrian and bicycle network created by missing connections.
- Provide streetscaping and beautification improvements along key neighborhood corridors.
- Install sidewalk connections to connect community amenities.
- Develop a neighborhood placemaking grant to encourage and fund beautification, streetscaping, and community building in neighborhoods and around community amenities.

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Appendix B: Consistency with MPC

UD Plan meets all the requirements of the Pennsylvania Municipalities Planning Code (MPC) for comprehensive plans. The following table outlines where each requirement is addressed in the plan.

	MPC Requirement	Where it is addressed in UD Plan
301(a)(1)	Community development objectives	Appendix B: Community Development Objectives
301(a)(2)	Plan for land use	Focus area chapters: Accessible Neighborhoods and Vibrant and Connected Communities Future Land Use chapter
301(a)(2.1)	Plan to meet housing needs	Focus area chapter: Accessible Neighborhoods Appendix C: Planning Elements Profile
201(a)(3)	Plan for movement of people and goods	Focus area chapters: Accessible Neighborhoods and Vibrant and Connected Communities Appendix C: Planning Elements Profile
301(a)(4)	Plan for community facilities and utilities	Focus area chapters: Vibrant and Connected Communities and Ad Resilient Environment Appendix C: Planning Elements Profile
301(a)(4.1)	Statement of interrelationships among the various plan components	Introduction chapter: Navigating UD Plan
301(a)(4.2)	Discussion of short- and long-range plan implementation strategies	Focus area and Implementation chapters
301(a)(5)	Statement that the existing and proposed development of the municipality is compatible with existing and proposed development and plans of contiguous portions of neighboring municipalities	Future Land Use chapter
301(a)(5)	Statement that existing and proposed development of municipality is generally consistent with the objectives and plans of the county comprehensive plan	Focus area chapters (Consistency with <i>Montco 2024</i>)
301(a)(6)	Plan for the protection for natural and historic resources.	Focus area chapters: Accessible Neighborhoods, Vibrant and Connected Communities, and Adaptive and Resilient Environment Appendix C: Planning Elements Profile



MPC Requirement		Where it is addressed in UD Plan
301(b)	Plan for reliable supply of water	Focus area chapter: Adaptive and Resilient Environment Appendix C: Planning Elements Profile
301.2	Careful surveys, studies, and analyses of the plan elements	Focus area chapters Appendix C: Planning Elements Profile
301.3	Submission of plan to County Planning Agency	UD Plan will be submitted to Montgomery County as part of the adoption process. Introduction chapter: Plan Process section provides more information on the County's role in the planning process.
302	Adoption process requirements	This plan will be adopted according to the process included in the MPC.

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Appendix C: Planning Elements Profile

To effectively create a vision for the future Upper Dublin Township, we needed to understand where the Township stands today; the purpose of this Planning Elements Profile was to establish that baseline. The following is a summary and analysis of available information on several key topics of interest, providing supplemental data and information to support UD Plan.

The topics include:

- [Regional Planning Context](#)
- [Population Characteristics](#)
- [Land Use](#)
- [Economic Development](#)
- [Housing](#)
- [Transportation](#)
- [Community Facilities and Services](#)
- [Natural Resources](#)
- [Historic Resources](#)

The Market and Real Estate Analysis, conducted by 4Ward Planning, contributed to this Planning Element Profile. The full Market and Real Estate Analysis is included as Appendix E.

Regional Planning Context

Upper Dublin Township is located in Montgomery County, Pennsylvania. It is part of the southeastern Pennsylvania region, which includes the City of Philadelphia. Development in the county was largely driven by its relation to markets in Philadelphia and transportation advancements that impacted industry competition and profitability. The greater region around Philadelphia evolved over decades of responding to industrial changes, from rail advancements through highway expansion, which changed the dynamics of local economies (i.e., where people live, and where they travel for work and shopping needs).

This plan examines trends impacting the greater Philadelphia region, shown in Figure 32 below as the Philadelphia MSA, and Montgomery County, to link the history of development to existing conditions and pathways forward. Housing and job markets in Upper Dublin are compared to its 20-minute Primary Market Area (PMA). This represents the catchment area from which 70% or more of consumer patronage originates. For analysis purposes, it is defined as the 20-minute drive-time contour from Dreshertown Plaza, the Township’s largest neighborhood shopping center. Parts of Montgomery County are much more rural in nature than Upper Dublin and may not be the most applicable comparison. The 20-minute PMA offers a more refined boundary to compare Upper Dublin to the communities closest to it.

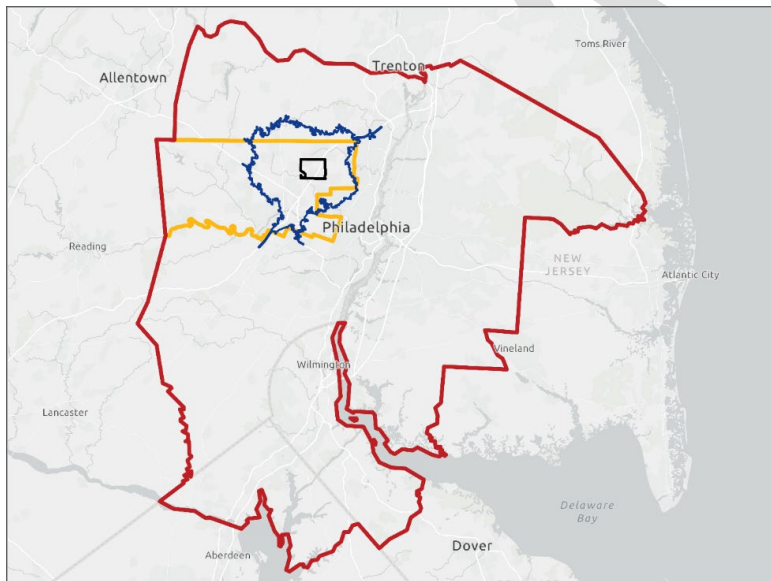


Figure 32: Upper Dublin Township Regional Map

Note: The 20-Minute Primary Market Area (PMA) represents the catchment area from which 70% or more of consumer patronage originates. For analysis purposes, it is defined as the 20-minute drive-time contour from Dreshertown Plaza, the Township’s largest neighborhood shopping center. The Philadelphia MSA (Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area) includes 11 counties in New Jersey, Pennsylvania, Delaware, and Maryland.



Regional and Community History

Before European colonization, the Lenni Lenape people inhabited the land around the greater Delaware River watershed. The Lenape are an Algonquin speaking tribe who lived in hundreds of villages in the region, usually near bodies of water.⁵⁵ Upper Dublin dates to English Colonies in 1684, when Edward Tanner named his land grant from William Penn "Upper and Lower Dublin." The "lower" portion has since been absorbed by Philadelphia. The "upper" portion has continued to exist around the original survey for the laying out and naming of Susquehanna Road.

Upper Dublin Township was established in 1701, when William Penn ordered a survey of all townships in the Commonwealth. It was first settled in 1698 and was incorporated in 1719 according to records from the Pennsylvania Historical and Museum Commission regarding Montgomery County municipalities. The county itself was formally created on September 10, 1784. The Township was granted its current status of First Class Township in the Commonwealth of Pennsylvania on January 1, 1946.⁵⁶

The early Europeans who settled in the general area operated farms, forges, and mills. People in Upper Dublin mostly engaged in farming and limestone mining at this time. They depended on the Philadelphia market to sell their products and on its port to connect them to the wider colonial world. Subsequent generations built a dense transportation network that linked laborers, suppliers, and consumers with each other and with the city, fueling the region's prosperity across the nineteenth and early twentieth centuries. Expansions in the transportation network greatly impacted industry in the region. For example, local farmers reduced grain crops when rail expansions brought cheaper grain from the Midwest to East Coast markets. Farmers in Montgomery County shifted more heavily toward dairy production, as rail lines could now quickly carry perishables to broader markets.

The county's land was developed gradually over many decades, with development consuming less open space in recent years. Each year from 2000 to 2010, approximately 1,280 acres of land was newly developed; from 2010 to 2020, the number dropped to 552 acres per year. Infill development has become a popular way of revitalizing neighborhoods and capitalizing on new opportunities for growth. The majority of land in Upper Dublin was developed prior to 1970, with notable development between 1970 and 2000, and little land developed since 2000.⁵⁷

In the 1950s, the construction of the Pennsylvania Turnpike played a significant role in shaping the county's development. Philadelphia's business leaders saw the turnpike as an opportunity to link the city to the national highway network, and they supported construction of the Schuylkill Expressway in 1958 to connect downtown Philadelphia with the turnpike at Valley Forge. However, the turnpike created a major east-west rout across Montgomery County that bypassed Philadelphia entirely, creating new employment and

⁵⁵ [The Historical Society of Montgomery County PA. \(2024\) The History of Montgomery County.](#)

⁵⁶ [Upper Dublin Township. \(2024\) History of Upper Dublin Township.](#)

⁵⁷ [Montgomery County Planning Commission. \(2023\) Montco 2050 Existing Land Use Background and Trends.](#)



shopping centers along the route and enabling a pattern of daily trips from suburb-to-suburb that eventually surpassed the suburb-to-city travel pattern established during the rail era. Montgomery County residents depended less on Philadelphia for employment, entertainment, shopping, and other daily activities.

Major economic centers grew where the turnpike intersected with other key routes, including in King of Prussia, Plymouth Meeting, and Fort Washington. Transportation arteries built in the 1950s and 60s saw the largest growth and remain as economic centers today. Large companies in the aerospace, defense, security, and pharmaceutical industries were drawn to the region, supporting large economic growth that enabled large developments like the King of Prussia Mall, the Plymouth Meeting shopping center, and the Fort Washington Office Park. By the close of the twentieth century, the county had become an economic engine, boasting the largest population and the largest job base among the counties surrounding Philadelphia.

The twentieth century transformed a county that had once boasted a sizable rail network into a suburban landscape shaped largely by highways. By the opening of twenty-first century, Montgomery County received more daily commuters traveling to its employment hubs than it sent outward. It even saw a positive commuting balance with Philadelphia, receiving more daily workers from Philadelphia than it sent into the city. Travel from suburb to suburb increased, creating a pattern that was ill-served by rail lines constructed to carry passengers back and forth to Philadelphia.

As in earlier eras, the diversity of the county's modern economic base remained an important strength. The county developed advanced manufacturing specialties like precision instruments, business machines and electronics, along with industrial chemicals and pharmaceuticals. It added high tech jobs in the fields of computer science, information technology, and telecommunications. Service jobs were also abundant in education, health care, retail, financial and professional services.⁵⁸

The Montgomery County Planning Commission has an interactive map viewer that shows development over time in the County.⁵⁹

Regional Characteristics

Montgomery County's population continues to grow, but the source of that growth has changed over time. From 2000 to 2010, the population primarily grew through new births; however, births have slowed since 2010 and population growth has primarily been driven by people moving from other areas into the county. In-migration may be motivated by people wanting to move to Montgomery County for employment and appealing communities, including amenities such as successful schools and great parks and trails. In-migration was primarily domestic until recently; in 2021 and 2022 international migration to Montgomery County exceeded domestic in-migration. These trends indicate that the county relies on in-migration to maintain

⁵⁸ [The Encyclopedia of Greater Philadelphia. \(2017\) Montgomery County, Pennsylvania.](#)

⁵⁹ [MCPC Development Over Time \(2024\)](#)



population growth for the foreseeable future, which is necessary to grow communities, support businesses and industries, and remain competitive.

Worker inflow/outflow tracks the movement of workers into and out of the county. Inflow workers come from elsewhere to work in the county, while outflow workers are the people that live here and travel outside the county to their jobs. There are also workers that both live and work in the county. Between 2000 and 2019, there was a 29% increase in the number of people coming into the county to work. It is notable that so many people choose to commute into Montgomery County for work. It is possible this may be due to higher housing costs in the county and that workers live in more affordable areas and commute to jobs in Montgomery County. The county has a diverse economy with numerous job opportunities, giving it a competitive advantage for capturing high-quality employees.⁶⁰

Commutes for Montgomery County residents were growing in distance during the early twenty-first century, reflecting the trends of the time when employment was still largely focused on in-person work in major job centers, and housing was generally more affordable further away from Philadelphia. Due to the COVID-19 global pandemic beginning in 2020, the availability of remote work has resulted in dramatic changes to transportation network usage in Montgomery County and around the world, with peak travel volumes distributed over a wider range of hours and increases in midday and evening vehicle trips. Most offices in the greater Philadelphia region now have between 25 percent and 50 percent worker occupancy on an average weekday.⁶¹

Montgomery County's population has been growing steadily at an annual rate of 0.6 percent per year. However, employment has been growing much faster, above 0.9 percent per year. This trend is forecasted to continue, with job growth outpacing population growth. Jobs in Montgomery County are distributed across a variety of industries. The largest number of jobs in the county are in the health care and social assistance industry, and this sector continues to grow.⁶²

Upper Dublin is home to a collection of residential neighborhoods with social infrastructure largely built around the school district. Like many other communities in Montgomery County, the township faces challenges with safety and walkability in its largely auto-centric environment. There are many opportunities to better connect neighborhoods, parks, shopping centers, and job opportunities across the township. Unlike other nearby municipalities, Upper Dublin does not have a central 'Main Street' or downtown center; however, residents can easily access this town form in adjacent Ambler Borough. While Upper Dublin houses the Fort Washington Office Park, the township is not dominated by commercial uses. Residents expressed their desire to keep the current form with a mostly residential township but with improved connections to other land uses that exist here.

⁶⁰ [Montgomery County Planning Commission. \(2023\) Montco 2050 People and Population Background and Trends.](#)

⁶¹ [Montgomery County Planning Commission. \(2023\) Montco 2050 Transportation Background and Trends.](#)

⁶² [Montgomery County Planning Commission. \(2023\) Montco 2050 Economic Development Background and Trends.](#)



Population Characteristics

Methodology

Using historical trend data, current year estimates (2023), and five-year projection data (2028) provided by ESRI Community Analyst (a proprietary analysis software), 4ward Planning analyzed socio-economic trends and projections across selected base and market study areas. Socio-economic trends associated with population, households, age distribution, educational attainment, income distribution, and household expenditure estimates (including dining out expenditures) are analyzed.

Socio-Economic Trends

Population and Households

Population and household growth in the Township are projected to be relatively flat through 2028. Absent significant investment, near-term local demand for new goods and services will come from shifts in household needs and preferences rather than from household growth.

Near-term land-use demand in the Township is largely driven by population growth and new household formation in the PMA. Areas where the population is growing, particularly if it is growing rapidly, are more attractive markets than are areas where the population is flat or in decline. According to Esri, a private firm that compiles socio-economic census data for various geographies, the 20-minute PMA is expected to increase by approximately 3,280 residents through 2028. The rate of population growth in the PMA has been declining over the past two decades. The projected rates of population growth in both the Township and PMA are expected to be relatively flat through 2028 (0.4% and 0.1% per year, respectively). Population and household projections suggest there will be relatively flat regional near-term market demand for new goods and services.

Figure 33: Population Trends, Estimates, and Projections

Source: US Census; ESRI

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%



Figure 34: Annualized % Population Change Trends and Projections

Source: ESRI

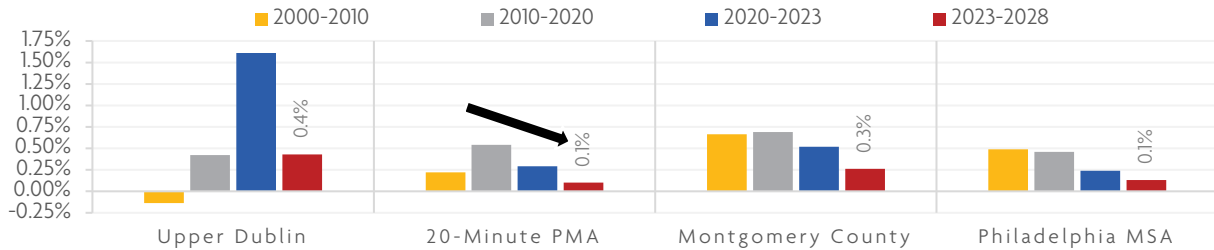


Figure 35: Household Trends, Estimates, and Projections

Source: Census; ESRI

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%

Figure 36: Annualized % Household Change Trends and Projections

Source: ESRI

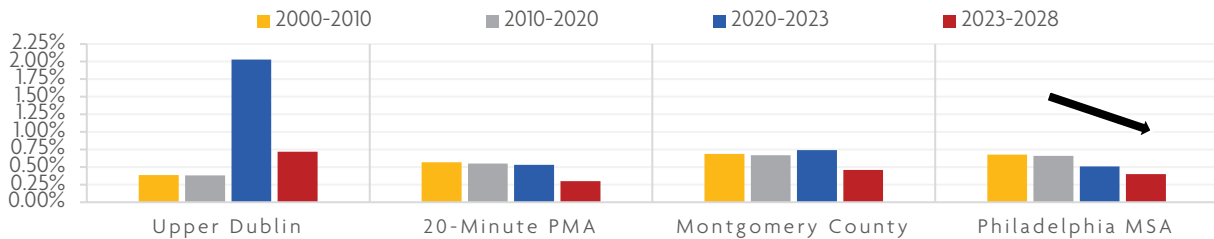
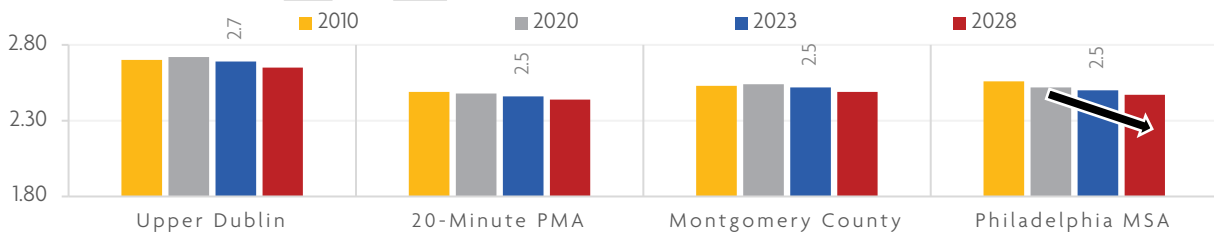


Figure 37: Household Size Trends and Projections

Source: ESRI





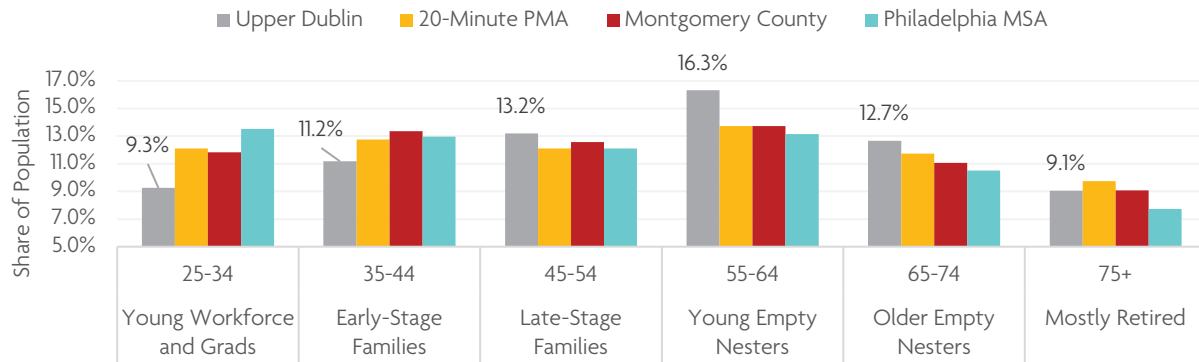
Age Distribution

Household needs and preferences tend to change as people age due to various factors, including shifts in income, family structure, lifestyle preferences, and financial priorities. As illustrated in Figure 38 below, young empty nesters (those between ages 55 and 64) represent the top age cohort by share of adult Township residents (16.3%), while the young workforce and grads cohort (between ages 25 and 34) represent the smallest share of adult residents in the Township (9.3%). While the youngest adult cohort may choose to rent by choice or financial need, empty nesters may choose to downsize into smaller homes, townhouses, or condominiums.

According to a Redfin study which analyzed 2022 American Community Survey census data, empty nesters (baby boomer households with no children in the home) in the Philadelphia metro own 28% of the region’s large homes (those with three or more bedrooms), while millennial households with children own less than half as many (13%). The Philadelphia metro ranks 18 among U.S. metros where empty-nester baby boomers own the highest share of large homes.⁶³ Part of this householder-housing size imbalance is due to the lack of financial incentives for empty nesters to let go of large homes (many have already paid off their mortgages). These older households choosing to age in place are driving demand for age-in-place services (e.g. home healthcare workers are one of the top occupations in the nation in terms of projected job growth).

Figure 38: Adult Population Distribution by Life Stage, 2023

Source: ESRI

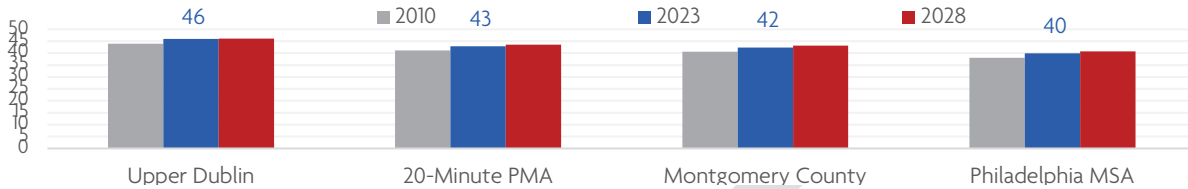


⁶³ Redfin, Empty Nesters Own Twice as Many Large Homes as Millennials With Kids, January 16, 2024



Figure 39: Median Age

Source: ESRI



Educational, Income, and Spending Levels

The average household in the PMA spends approximately \$4,360 per year on food away from home. New housing in the Township could attract more households and help support more food and beverage establishments.

Educational attainment and income levels are relatively high in the Township. For example, 70% of the Township’s adult population ages 25 and older have attained a bachelor’s degree or higher, compared to 43% in the MSA. Since educational attainment is often strongly and positively correlated with income, it is not surprising the median household income in the Township (\$155,407) is also significantly higher than that in the MSA (\$83,525). People with higher incomes tend to have higher disposable incomes and the ability to spend more on non-essential items, which can help support local businesses. For example, the average Township household spends approximately \$2,230 per year on dining out at full-service restaurants (66% on dinner) and \$2,130 per year on dining out at fast food, takeout, or delivery food establishments, totaling \$4,360 per year on food away from home (53% on dinner). Potential new housing development in the Township (e.g., higher-density townhomes or apartment developments, in particular) could increase the Township’s overall household density and customer base, which could help attract and support more food and beverage establishments.

Figure 40: Average Annual Household Expenditures on Dining Out, 2023

Source: ESRI

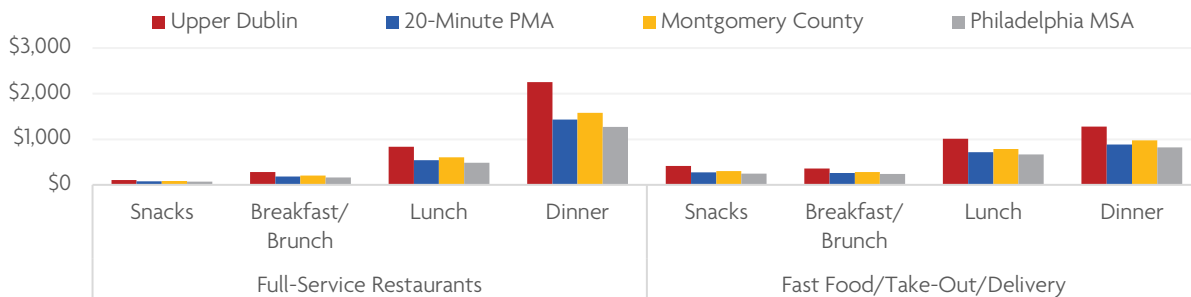




Figure 41: Educational Attainment by Share of Adult Population (25+ Years)

Source: ESRI

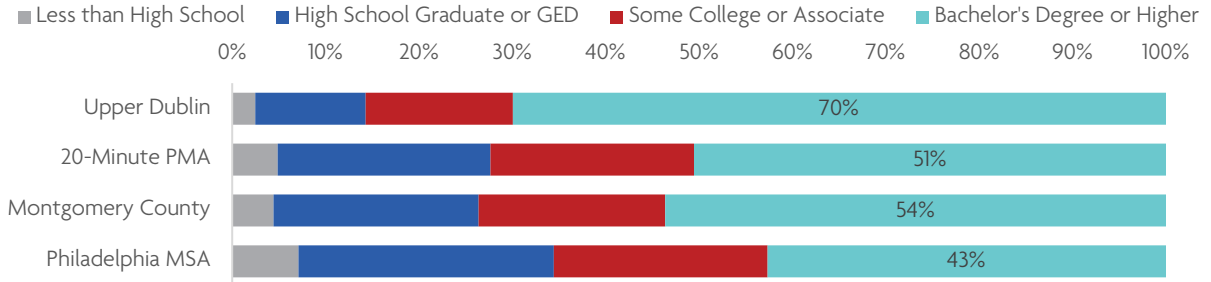


Figure 42: Income Comparisons, 2023

Source: ESRI

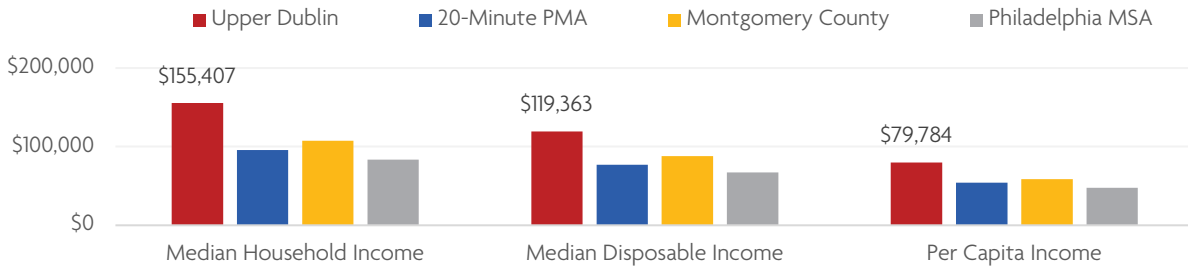
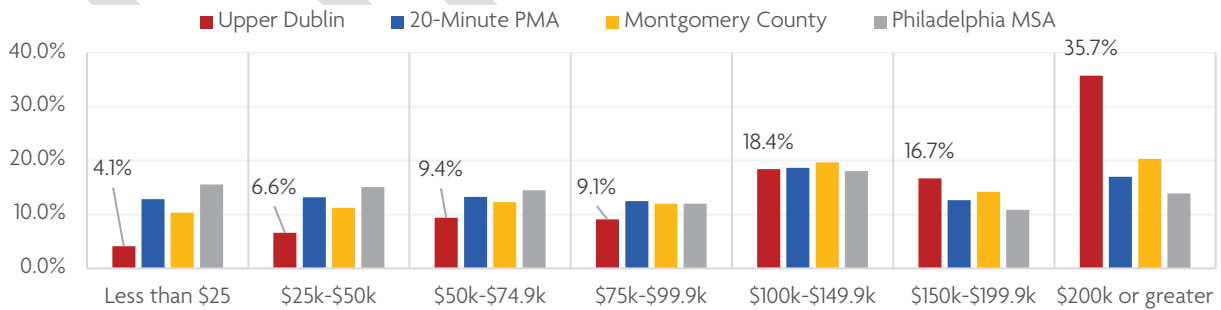


Figure 43: Household Income Distribution, 2023

Source: ESRI





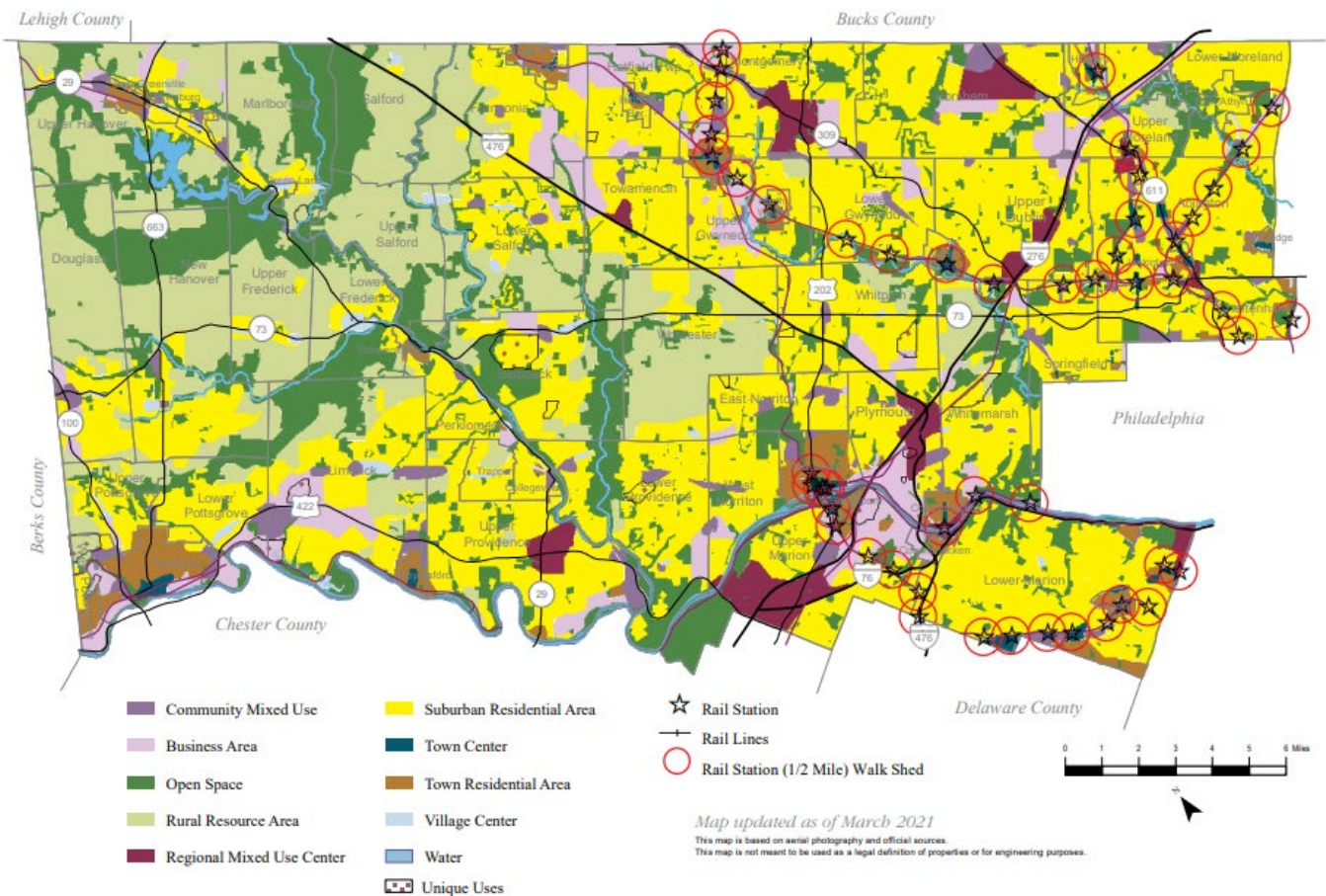
Land Use

Regional Land Use

Montco 2024: A Shared Vision, the Montgomery County Comprehensive Plan, identifies Upper Dublin as primarily a suburban residential area with open space and a regional mixed-use center (in the Greater Fort Washington District area) in the future land use map.

Figure 44: Montgomery County Future Land Use

Source: Montco 2040 (2021)





Existing Land Use

Approximately 96% of the land in Upper Dublin Township is largely built out; this means that most of the land is either developed or preserved as open space. Today, the makeup of the Township remains relatively consistent with the suburban character that began to develop in the 1950’s with nearly 60% of the Township being single-family residential lots and absent of any agricultural uses that were dominant in the history of Upper Dublin. Similar suburban style development is found in parts of the Township with commercial land use. With the exception of The Promenade at Upper Dublin, the commercial shopping centers and Fort Washington Office Park are primarily single-use, autocentric developments. In recent years, the Parks and Recreation Department has made consistent efforts to shift land uses to ensure that the Township grows sustainably. Currently, 12% of the Township is either public or private open space.

Land use has remained fairly consistent throughout the last two decades. The most notable change is in the slight increase in multi-family residential land use (from 1 to 34%). While the comparison chart shows a significant decrease in vacant land use, this is due to the method of categorization. If a vacant parcel was categorized with a specific type of land use in the data from Montgomery County, then it was categorized as that land use type, rather than vacant (e.g., Vacant – Commercial was categorized as Commercial). The vacant land use category in the case is for any property that was identified as vacant without a specific type of land use associated with it. This allows us to understand the general development patterns throughout the Township regardless of whether they are vacant at this point in time.

Figure 45: Comparison of Existing Land Use (2010 and 2024)

Source: Upper Dublin Township Comprehensive Plan (2010); Montgomery County (2024)

Land Use Category	2010 Land Use		2024 Land Use	
	Total Acres	Percentage of Acreage	Total Acres	Percentage of Acreage
Single-Family Residential	4,333	57%	4,444	58%
Multi-Family Residential	95	1%	321	4%
Institutional	941	12%	863	11%
Commercial*	656	9%	667	9%
Open Space/Public Recreation	630	8%	647	8%
Private Recreation	308	4%	324	4%
Vacant	323	4%	9	0%
Industrial	185	2%	241	3%
Utility & Road Right-of-Way	115	2%	102	1%
Unclassified*	31	0%	0	0%
Total	7,617	100%	7,617	100%

* Numbers are rounded to the nearest percent. The commercial land use category includes office and mixed-use. Total acreage calculated in 2010 was 7,686. The total acreage from the 2024 Montgomery County data was 7,617. To aid in a comparison, the difference (31 acres) is listed as unclassified for the 2010 data.



Figure 46: Existing Land Use (2024)

Source: Montgomery County (2024)

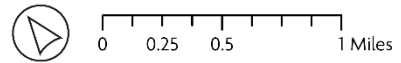
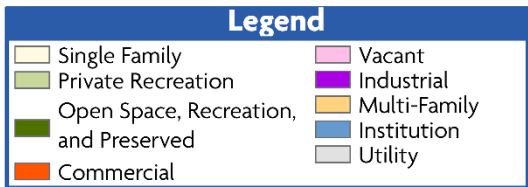
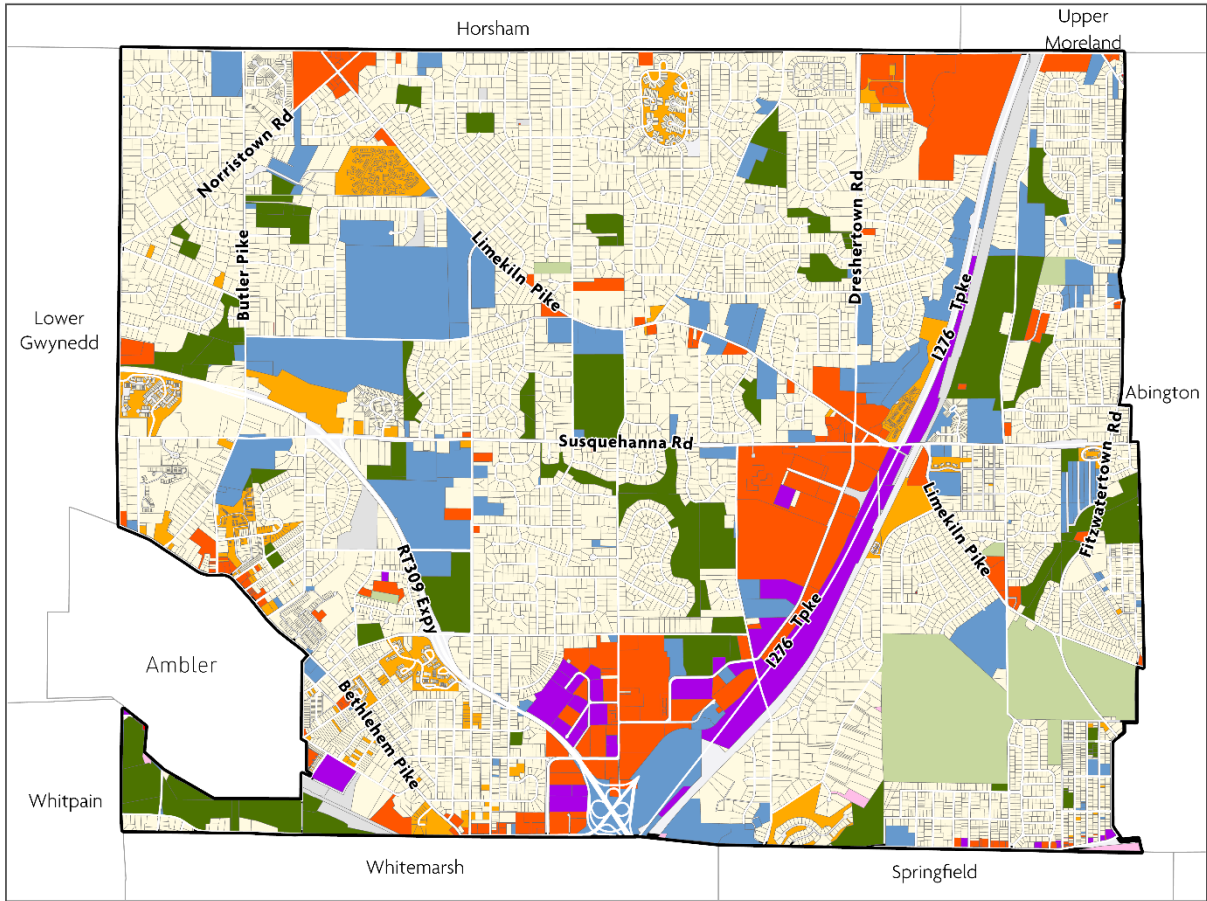
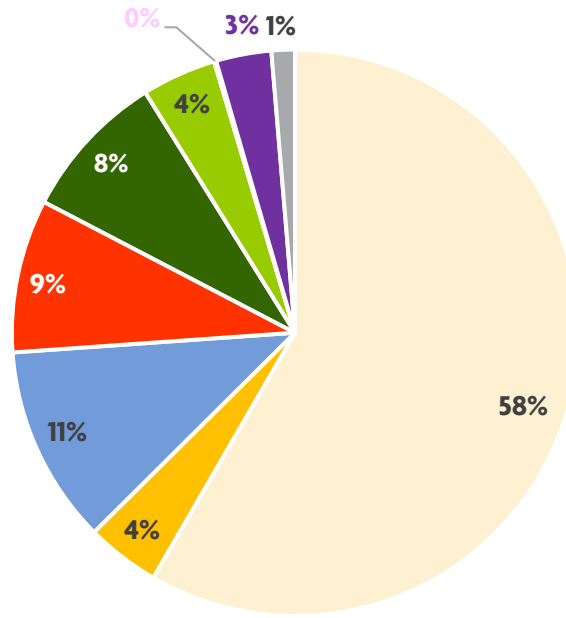




Figure 47: Existing Land Use Chart (2024)

Source: Montgomery County (2024)



- Single-Family Residential
- Commercial
- Vacant
- Multi-Family Residential
- Open Space/Public Recreation
- Industrial
- Institutional
- Private Recreation
- Utility

Zoning

Upper Dublin Township’s land use is regulated by its zoning ordinance and subdivision and land development ordinance (SALDO). Its zoning ordinance was enacted in 1956, with significant sections of the of the code being amended throughout the decades. During conversations with Township staff and community members, it has been noted that there are inconsistencies in some cases between existing character and conditions of an area and the zoning (e.g., minimum lot sizes being larger than existing lot sizes). Upper Dublin Township will be updating its zoning ordinance following the adoption of UD Plan to align the zoning with existing character and proposed character and recommendations in the comprehensive plan.



Figure 48: Existing Zoning Pie Chart

Source: Upper Dublin Township (2024)

- A - A Residential
- A1 - Planned Residential
- A2 - Planned residential 2
- AHS - Apartment House Special
- AQH - Age Qualified Housing
- B - B Residential
- C - C Residential
- CRI- Commercial Retail Class I
- CRL - Commercial Retail Class L
- DO - Dresher Overlay
- EC - Employment Center
- ECO - Employment Center Overlay
- FWVO - Fort Washington Village Overlay
- INST - Institutional
- JVO - Jarrettown Village Overlay
- MD - Multi-Dwelling
- MGO - Maple Glen Overlay
- MHD - Mobile Home
- MRD - Mixed Residential
- MRH - Mixed Use Residential Hisotirc District
- NH - North Hills Residential
- OC - Office Center
- RE - Recreational
- SC - Shopping Center
- GFW - Greater Fort Washington District

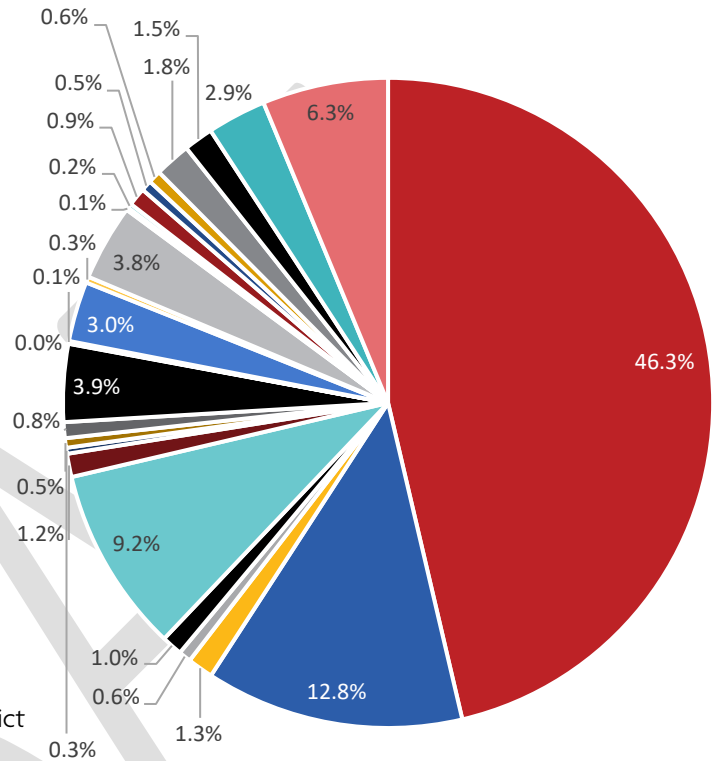




Figure 49: Existing Zoning Table

Source: Upper Dublin Township (2024)

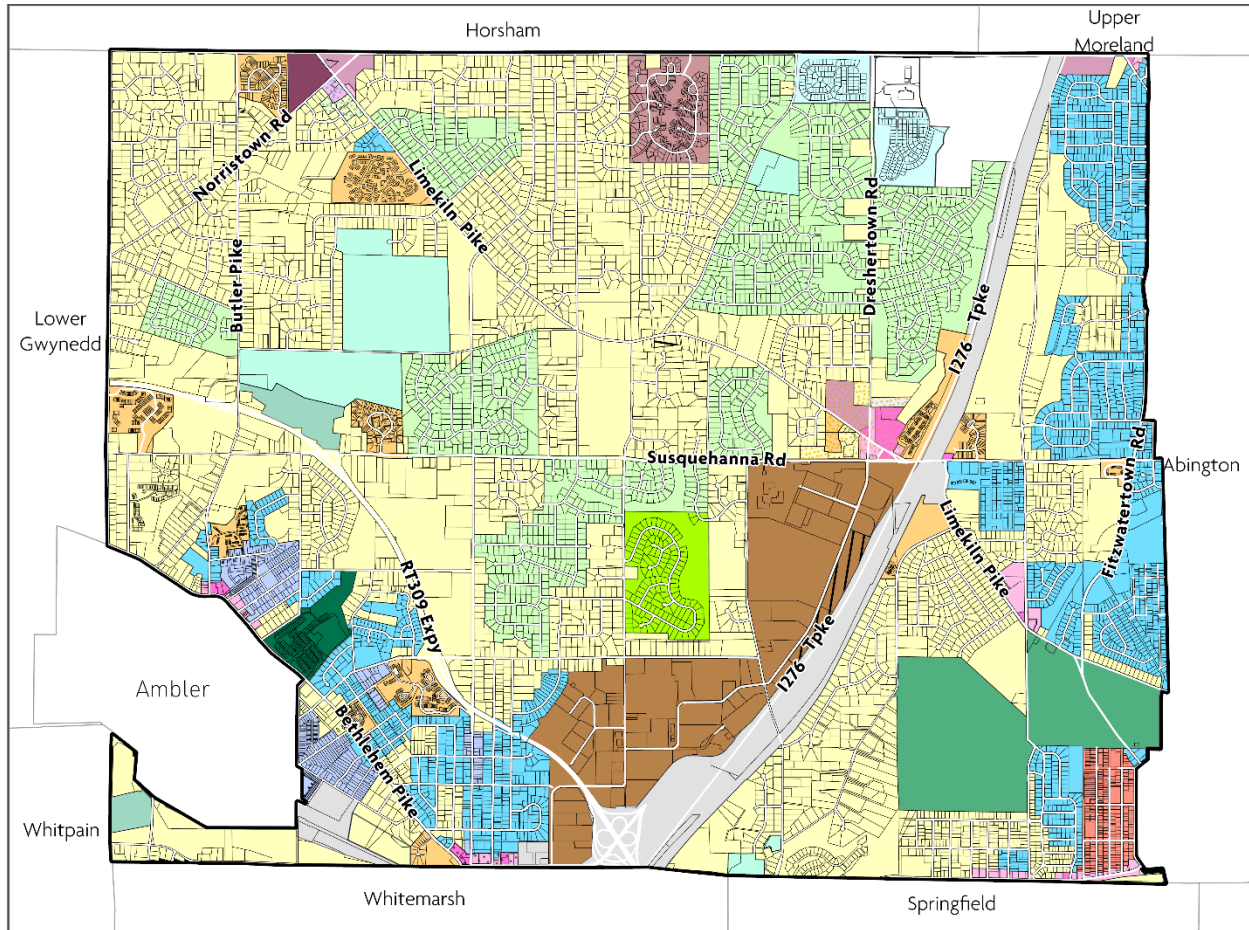
Zoning District	Acreage	Percent
A - A Residential	3545.8	46.3%
A1 - Planned Residential	982.5	12.8%
A2 - Planned Residential 2	97.9	1.3%
AHS - Apartment House Special	46.9	0.6%
AQH - Age Qualified Housing	78.8	1.0%
B - B Residential	707.9	9.2%
C - C Residential	88.6	1.2%
CRI - Commercial Retail Class I	22.6	0.3%
CRL - Commercial Retail Class L	36.2	0.5%
DO - Dresher Overlay	60.5	0.8%
EC - Employment Center	295.4	3.9%
ECO - Employment Center Overlay	2.4	0.0%
FWVO - Fort Washington Village Overlay	8.1	0.1%
INST - Institutional	228.8	3.0%
JVO - Jarrettown Village Overlay	22.9	0.3%
MD - Multi-Dwelling	289.9	3.8%
MGO - Maple Glen Overlay	9.5	0.1%
MHD - Mobile Home	17.3	0.2%
MRD - Mixed Residential	69.2	0.9%
MRH - Mixed Use Residential Historic District	40.9	0.5%
NH - North Hills Residential	49	0.6%
OC - Office Center	136.9	1.8%
RE - Recreational	111.7	1.5%
SC - Shopping Center	224.5	2.9%
GFW - Greater Fort Washington District	479	6.3%
Total	7653.2	100%

*Total acreage is slightly higher than land use acreage due to overlays.

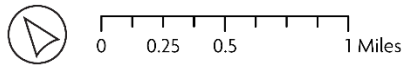


Figure 50: Existing Zoning Map

Source: Upper Dublin Township (2024)



Legend		
Zoning Districts	DO - Dresher Overlay	MGO - Maple Glen Overlay
A - A Residential	EC - Employment Center	MHD - Mobile Home
A1 - Planned Residential	ECO - Employment Center Overlay	MRD - Mixed Residential
A2 - Planned Residential 2	FWVO - Fort Washington Village District Overlay	MRH - Mixed Use Residential Historic District
AHS - Apartment House Special	GFW - Greater Fort Washington District	NH - North Hills Residential
AQH - Age Qualified	INST - Institutional	OC - Office Center
B - B Residential	JVO - Jarretown Village Overlay	RE - Recreational
C - C Residential	MD - Multi-Dwelling	SC - Shopping Center
CRI - Commercial Retail Class I		
CRL - Commercial, Retail Class L		





Economic Development

Job Locations

According to 2021 primary job data based on employer and employee locations provided by the U.S. Census Bureau (the latest year provided), 258,450 primary job workers commuted into the 20-minute PMA for work (70.9% of primary workers in the PMA), and 188,140 residents commuted outside the PMA for work (resulting in net in-migration of primary job workers).⁶⁴ In 2021, 37,320 primary workers in the PMA commuted more than 25 miles to work, suggesting there is likely pent-up housing demand, as some workers may trade a long commute if quality affordable housing were available in the PMA. From 2002 to 2021, the share of residents both living and working in the PMA declined by approximately 6%, suggesting an increasing local jobs/housing imbalance.

Figure 51: Primary Worker Inflow/Outflow Trends: 20-Minute PMA

Source: U.S. Census Bureau Center for Economic Studies, LEHD, 2021

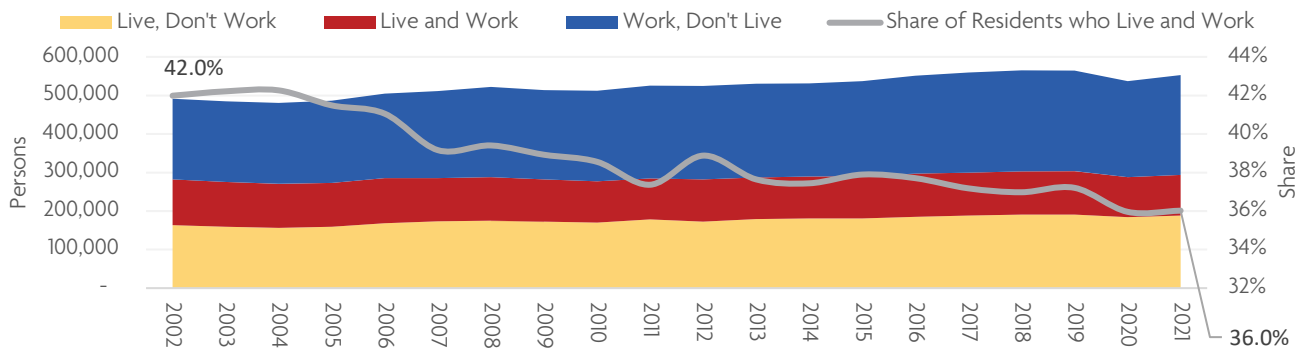
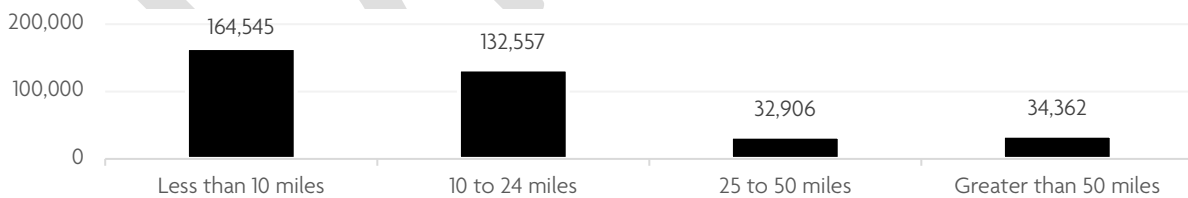


Figure 52: Distance to Work: 20-Minute PMA Primary Workers, 2021



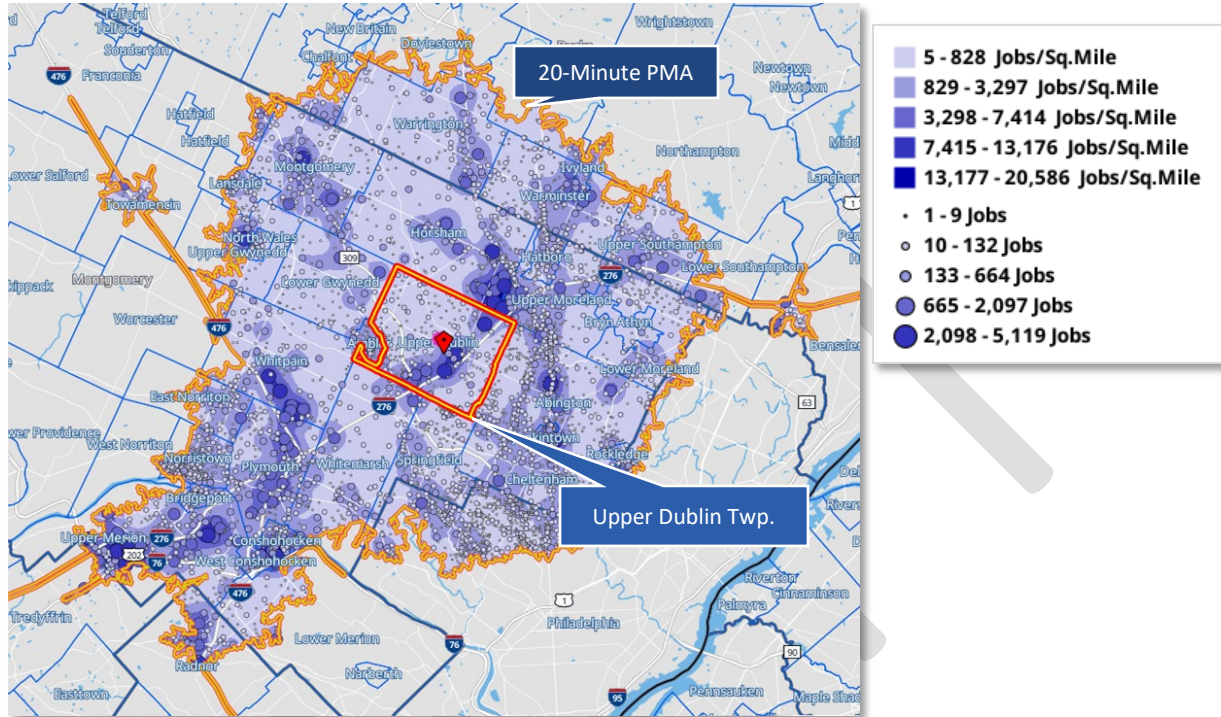
Note: Figures are based on U.S. Census employer and employee location data.

⁶⁴ A primary job represents the highest paying job for an individual worker for the year, and the count of primary jobs is equivalent to the count of workers in a given location.



Figure 53: Primary Job Clusters: 20-Minute PMA, 2021

Source: U.S. Census Bureau Center for Economic Studies, LEHD, 2021





Employment and Earnings

According to the Delaware Valley Regional Planning Commission, employment is projected to increase by nearly 16% by 2050 through the creation of 3,212 new jobs. This nearly matched the projected population growth for the region at 14% or 3,653 new residents.

The county's largest employer, Merck Sharp & Dohme Corporation, is located at the edge of the 20-minute PMA. This manufacturing sector employer provides relatively high-wage job opportunities in the county.

According to second-quarter 2023 data provided by the Quarterly Census of Employment and Wages, Merck & Company, Inc., a pharmaceutical firm and manufacturing sector employer, is the top employer in Montgomery County. The Merck Sharp and Dohme Research Lab is located at the northern edge of the 20-minute PMA, nine miles northwest of the Township's boundaries. The manufacturing sector provides relatively high-wage job opportunities in the county (\$111,300 per year as of fourth-quarter 2022) and has seen recent job growth (increasing by 1,850 jobs from first-quarter 2017 to first-quarter 2023).

Three of the top five employers in the county are within the health care sector (Abington Memorial Hospital, Main Line Hospitals, and Albert Einstein Medical Center). Not surprisingly, the health care and social assistance sector currently represents the county's top sector by employment (16% of total jobs as of first-quarter 2023). This sector is also the top sector by recent employment growth in the county (increasing by 11,180 jobs from first-quarter 2017 to first-quarter 2023). This sector provides relatively mid-wage job opportunities (\$63,350 per year as of fourth-quarter 2022).

The finance and insurance, and professional, scientific, and technical services (PSTS) sectors (the second and fourth largest sectors by employment in the county) also saw recent job growth in the county, increasing by 5,690 and 3,500 jobs, respectively, from first-quarter 2017 to first-quarter 2022. These two sectors provide relatively high-wage job opportunities (\$121,550 and \$134,480 per year, respectively).

While employment among the county's top sectors have recovered to pre-pandemic levels or higher, retail trade, a sector that was declining even before the pandemic, remains below pre-pandemic levels. The pandemic likely accelerated existing trends in retail that were causing further challenges for traditional retailers and impacting sector employment (e.g., rise of e-commerce, self-checkout systems, consolidation, bankruptcies, and shifting consumer preferences). Retail trade provides relatively low-wage job opportunities (\$44,616 per year).



Figure 54: Top 10 Employers in Montgomery County

Source: PA Department of Labor and Industry, Quarterly Census of Employment and Wages, 2Q 2023

Rank	Employer	Rank	Employer
1	Merck Sharp & Dohme Corporation	6	SmithKline Beecham Corporation
2	Abington Memorial Hospital	7	SEI Investments Company
3	Main Line Hospitals Inc	8	Giant Food Stores LLC
4	State Government	9	Lockheed Martin Corp
5	Albert Einstein Medical Center	10	Federal Government

Figure 55: Employment Trends by Top Six Industries by Employment: Montgomery County

Source: US Census Bureau, Center for Economic Studies, LEHD

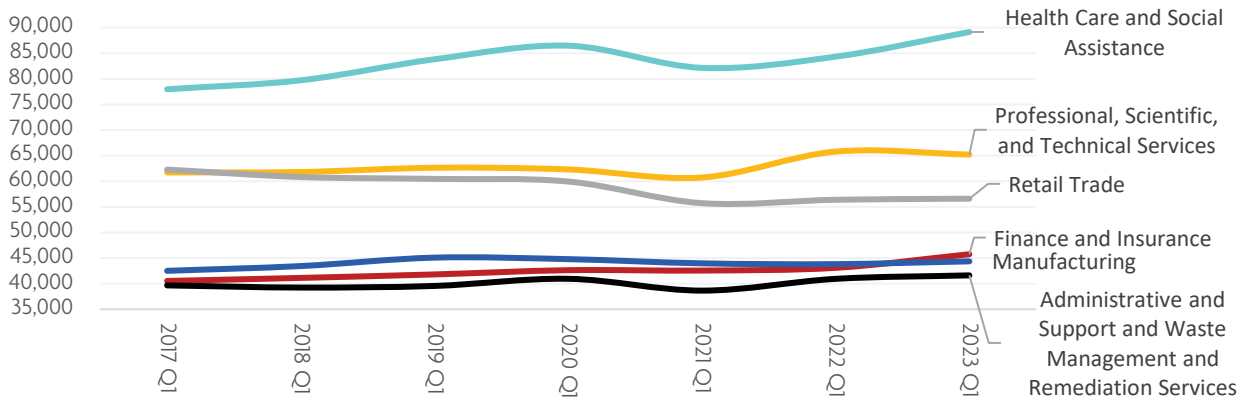
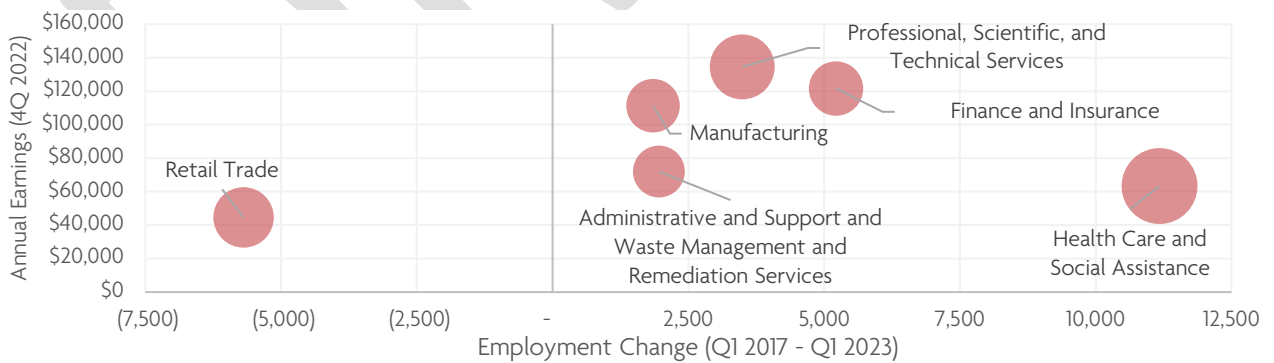


Figure 56: Top Six Industries by Employment and Earnings

Source: US Census Bureau, Center for Economic Studies, LEHD



Note: Bubble size represents employment in Montgomery County as of first-quarter 2023.



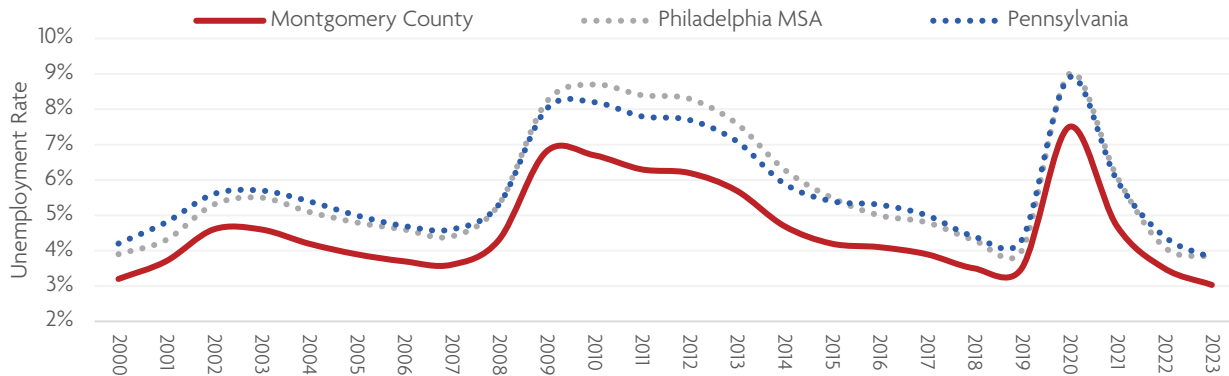
Unemployment Rate

The county’s unemployment rate is historically low, indicative of an extremely tight labor market. Some companies may face challenges in expanding or meeting demands due to a limited pool of workers.

According to non-seasonally adjusted monthly unemployment data provided by the U.S. Bureau of Labor Statistics (BLS), Montgomery County’s current unemployment rate (2.7% as of October 2023) is historically very low (the lowest it has been in over two decades). Furthermore, over the past three decades, the county’s unemployment rate has been consistently lower than that in the MSA and state, suggesting it has a relatively tight labor market. In October 2023, the county’s unemployment rate was also relatively low compared to that observed in the Philadelphia MSA (3.6%) and state (3.2%). While a tight labor market with very low unemployment can drive up wages as companies compete for skilled workers, some companies may face challenges in expanding or meeting demands due to a limited pool of workers.

Figure 57: Average Unemployment Rate Trends

Source: U.S. Bureau of Labor Statistics (2023)



Office Trends

According to data provided by Cushman & Wakefield, a commercial real estate brokerage and real estate data company, the Suburban Philadelphia office submarket contains nearly 62.4 million square feet of existing office space (46% of that in the Philadelphia MSA), making it vulnerable to changes in the office market. Like much of the nation, the Suburban Philadelphia’s office market has experienced rising office vacancy rates and net negative absorption over the past three years - due to the rise of remote and hybrid



work models, spurred by the Covid-19 pandemic and decreasing demand for traditional suburban office space. As of third-quarter 2023, the Suburban Philadelphia office market experienced a negative net absorption of 1.5 million square feet of office space (meaning, more space became available for lease than space leased during the quarter). Although the office market is expected to stabilize over the next year, as more companies implement return-to-office mandates, office vacancy rates remain well above pre-pandemic levels, suggesting office project sponsors proceed with caution.

Converting some underused office space (those which have footplates accommodative of adaptive reuse for residential) is a key part of post-pandemic plans in many cities to create much-needed housing. According to a January 2024 report published by RentCafe, a provider of real estate data, the Philadelphia metro's current pipeline for converting old office buildings into new apartments is ranked 14th among the nation's 387 metros. The Philadelphia metro area is converting 975 units from office spaces, which is 19.1% of the region's conversions and a notable 136% increase from 2022.⁶⁵

Business Parks

Located at the crossroads of the PA Turnpike and PA Route 309, the 536-acre Fort Washington Office Park is the township's only business park. According to discussions with two local brokers and data provided by Costar, largely due to demand for smaller office footprints, Fort Washington Office Park's vacancy rate (14%) is relatively healthy compared to the suburban Philadelphia office market. Based on the health of the Fort Washington Office Park and responses from local commercial brokers, the Township should continue to support existing zoning with exceptions for certain parcels that will likely not be occupied for office use.

⁶⁵ RentCafe, Market Insights, *From Boardrooms to Bedrooms: A Record 55K Office-to-Apartments Expected in Major Cities*, January 30, 2024

Figure 58: Business Parks: Montgomery County

Source: MCPC and ESRI (2023)

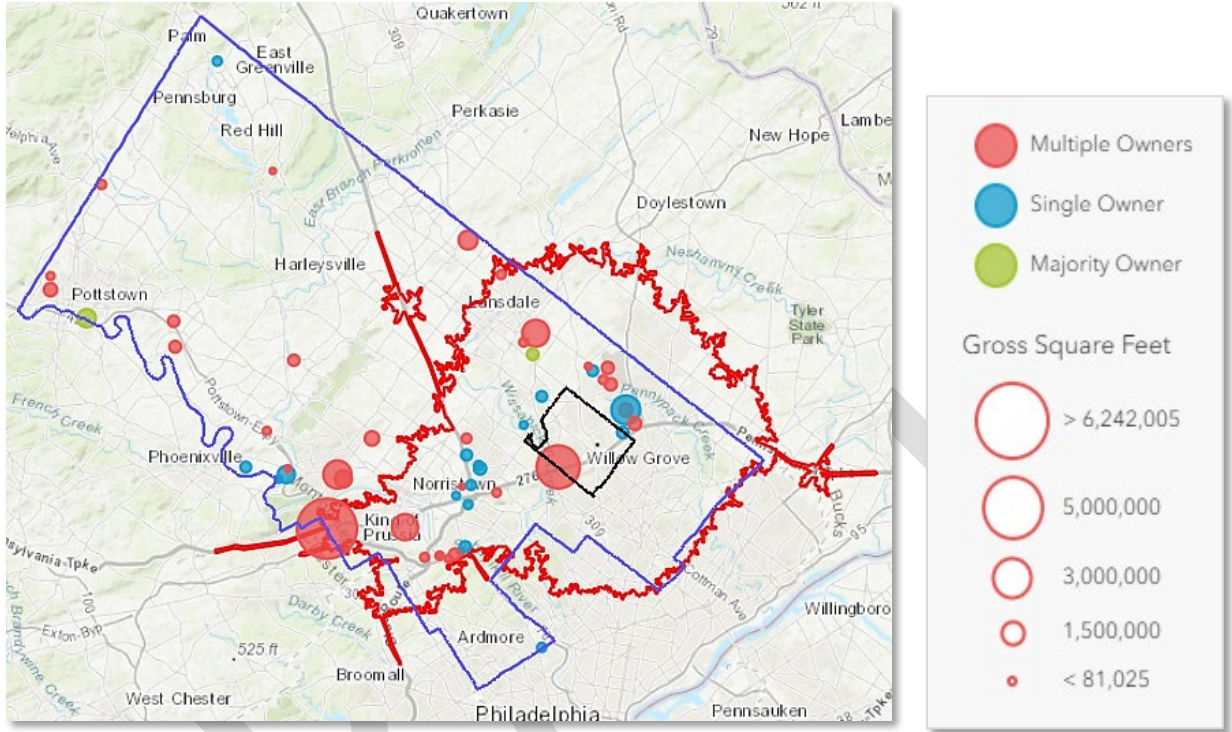


Figure 59: Fort Washington Office Park: Available Spaces

Source: Somerset Properties

Park Location	Square Feet		Vacancy Rate	Building Class
	Total	Available		
1100-1400 Virginia Drive	679,696	93,859	13.8%	A
275 Commerce	50,833	357	0.7%	A
414 Commerce	37,017	5,176	14.0%	C
Total	767,546	99,392	12.9%	



Montgomery County Retail Market

With a quarter of the nine-county Philadelphia MSA’s retail square feet located in Montgomery County (31.4 million), the county is a major retail hub in the metro area. While the county, however, has seen negative year-to-date net absorption of retail space (-197,805 square feet), it has a relatively low availability rate⁶⁶ (6.2%) compared to the MSA (7.2%) and relatively high asking retail rents (\$21.13) compared to the MSA (\$19.32) - suggesting the county’s retail market is relatively strong in terms of occupancy and demand. With just 9% of MSA retail space under construction in the county, there will be little new retail space coming on the market in Montgomery County.

Local Shopping Centers

According to data provided by the Montgomery County Planning Commission and BET Investments Inc., (a national real estate investor and developer) there is 289,975 square feet of existing neighborhood shopping center space in Upper Dublin Township (within three centers: Dreshertown Plaza Shopping Center, Fairway Shopping Center, and Maple Glen Shopping Center) and 148,326 square feet of community shopping center space recently completed at the Promenade at Upper Dublin lifestyle center. The ages of the Dreshertown Plaza, and Fairway and Maple Glen Shopping Centers (47, 69, and 55 years, respectively) suggest the sites could be near-term redevelopment candidates, whereby housing (e.g., multi-family units) is created as part of an entire shopping center site redevelopment including anchor grocers, restaurants, and personal service shops - similar to the Promenade at Upper Dublin.

Figure 60: Neighborhood Shopping Center: Upper Dublin Township

source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals, BET Investments Inc.

Name	Type of Center	Major Tenants/ Anchors	Number of Stores	Gross Floor Area (Sq. Feet)	Site Acres	Year Built
Dreshertown Plaza	Neighborhood	George's Market at Dreshertown	29	96,755	10.2	1977
Fairway	Neighborhood	Acme Markets	9	41,220	3.9	1955
Maple Glen	Neighborhood	Giant Food	15	62,000	6.9	1969
Promenade at Upper Dublin	Community	Sprouts Farmers Market	39	148,326	23.9	2020

⁶⁶ An availability rate is the ratio of available space, which is calculated by dividing the total square feet available by the total rentable square feet.



Housing

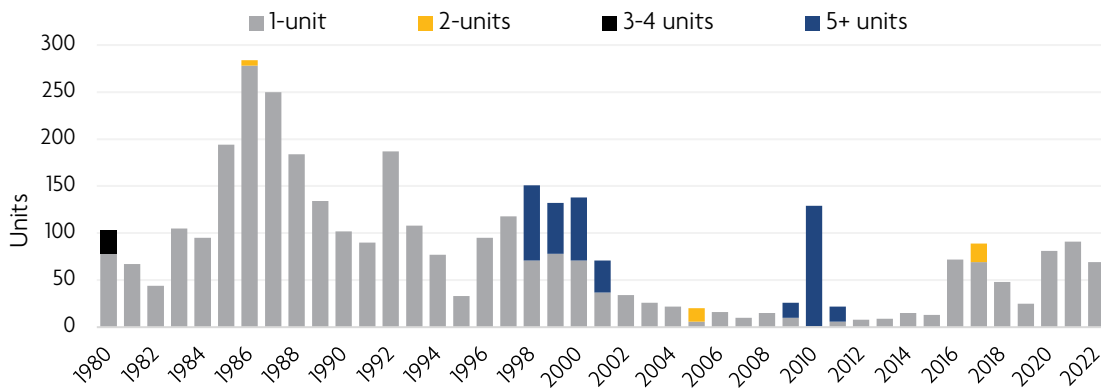
Housing Inventory

Upper Dublin contains 10,719 housing units. The township is largely suburban in nature, with 810 housing units per square mile (compared to 1,230 units/square mile in the 20-minute Primary Market Area (PMA) around Dreshertown Plaza.

475 housing units have been permitted in the Township since 2016 (see Figure 61). A recent notable housing development is the Promenade at Upper Dublin which added approximately 400 luxury apartment units to the Township (includes studios, and one- and two-bedroom units). The Promenade is a mixed-use development with retail space below the apartments. According to BET Investments, Inc., the apartments, which were built in two phases from late 2020 to early 2021, were 95% occupied and 97 leased by March 2022 (after 17 months).⁶⁷

Figure 61: Upper Dublin Township Housing Unit Permit Trends

Source: Census Bureau's Building Permits Survey, SOCDS Building Permits Database



According to third-quarter construction reports provided by the Montgomery County Planning Commission, there are 3,050 units in the development pipeline, with 1,306 of these units in the 20-minute PMA (see Figure 64). The 310-unit J at Dresher (Jefferson) luxury apartment project (includes one-, two- and three-bedroom units) is currently under construction in the Township.

⁶⁷ 4Ward Planning. (2023) Upper Dublin Township Market Analysis.



Figure 62: Residential Development Pipeline: Montgomery County, 3Q 2023

Source: Montgomery County Planning Commission, Quarterly Construction Report, 3Q, 2023

Project Name	Municipality	Single Family Units	Multi Family Units	Total Units	Construction Phase	20-Minute PMA	Mixed Use	Age Restricted Dev.
400 Elm Street	Conshohocken	-	348	348	Construction	X		
Sanatoga Greene	Lower Pottsgrove	147	310	457	Construction		X	
J at Dresher (Jefferson)	Upper Dublin	-	310	310	Construction	X		
Arden Parkside at Providence Town Ctr	Upper Providence	-	586	586	Construction		X	
River Pointe	Bridgeport	338	272	610	Land Prep.	X	X	
Victorian Village II	Hatboro	-	52	52	Land Prep.	X		X
Coulter Place	Lower Merion	-	131	131	Land Prep.		X	
Arbor Place	Norristown	150	192	342	Land Prep.	X		
230 Fairhill Street	Upper Moreland	-	132	132	Land Prep.	X		
The Mayer	Lower Merion	-	80	80	Holding			
Total		635	2,413	3,048				

Note: For inclusion in this report a development must have at least 50 housing units.

In 2023, the Township submitted five land development and three subdivision proposals to the Montgomery County Planning Commission (MCPC). The proposals covered 29 residential acres and zero non-residential acres. The majority of proposed residential units were in multi-family developments; proposals were for one single-family detached unit, two single-family attached units, and 385 multi-family units. Two of the developments were in the top ten largest residential proposals in the County in 2023: Luxor at 525 Virginia Dr (225 multi-family units) and 530 Virginia Dr (160 multi-family units).⁶⁸

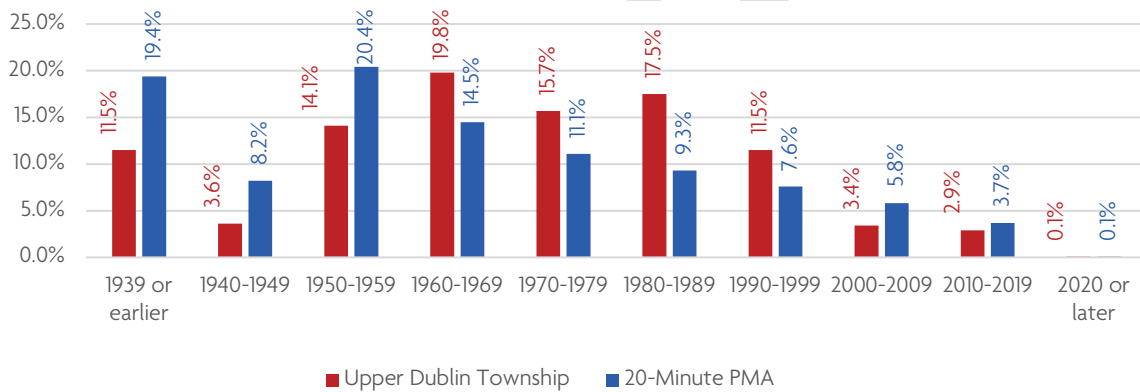
⁶⁸ MCPC. (2023). 2023 Annual Summary: Subdivision, Land Development and Zoning Activity.



Housing Characteristics

The majority of housing units in Upper Dublin were built between 1950 and 1989 (67.1%). The median year units were built in Upper Dublin is 1971. 11.5% of units were built before 1939; these units are more vulnerable to the impacts of hazard events such as tornados and windstorms. Upper Dublin has experienced similar housing development rates as nearby communities over the past ten years (3.0% of units in Upper Dublin and 3.8% units in the 20-minute PMA). 475 units have been permitted since 2016.

Figure 63: Housing Units by Year Built

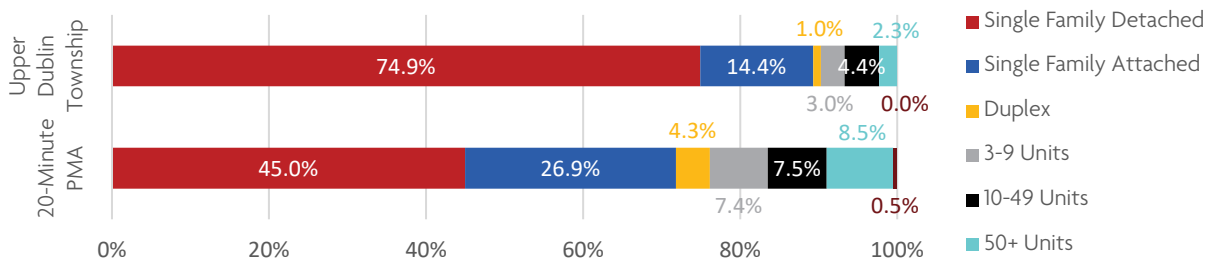


Housing Types

The majority of housing units (75%) in Upper Dublin are single-family detached units, which is much higher than the portion of single-family detached units in nearby municipalities, and smaller portions of single family-attached, duplex, and multi-unit structures.

Figure 64: Housing by Structure Type, 2024

Source: ESRI



Senior Housing

Age restricted housing communities and independent living units represent 7% of all units in Upper Dublin, compared to just 3% of all housing units in the PMA. The 114-unit Enclave at the Promenade is a recently completed 55-plus retirement community in the Township.

According to data provided by the MCPC, there are 128 age-restricted housing communities and independent living units in Continuing Care Retirement Communities in the county (inventory does not include assisted living or nursing care units/beds). These communities provide approximately 20,230 units, representing 6% of all housing units in the county. Approximately 43% of total units in the county (8,700 units) are in the 20-minute PMA (representing 3% of all units in the PMA), and 4% (750 units) are in Upper Dublin Township (representing 7% of all units in the Township).



Enclave at the Promenade

- 55+ active adult community
- 114 detached single-family homes
- Clubhouse, fitness center, pool, bocce ball and pickleball courts

Figure 65: Age-Restricted Housing Summary

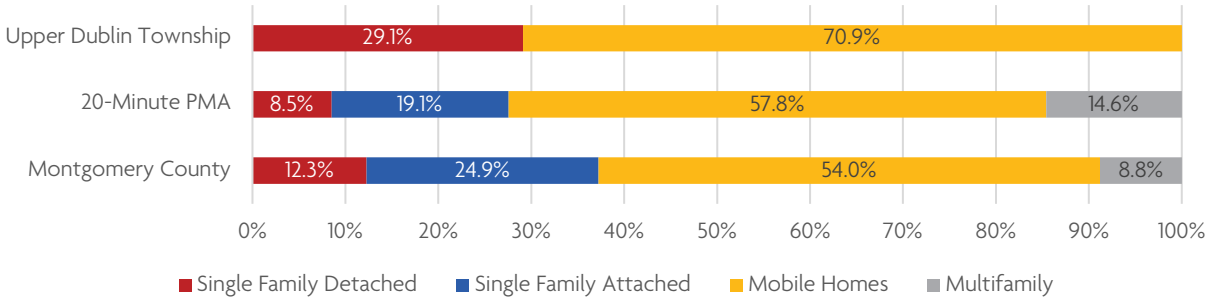
Source: MCPC, Montgomery County Board of Assessment Appeals

Age-Restricted by Type	Upper Dublin Township	20-Minute PMA	Montgomery County
Single Family Detached	219	740	2,484
Single Family Attached	0	1,658	5,047
Mobile Homes	533	5,032	10,922
Multifamily	0	1,270	1,778
Total Age-Restricted	752	8,700	20,231
Share of Total Housing Units	7%	3%	6%



Figure 66: Age-Restricted Housing Types by Geography

Source: MCPC, Montgomery County Board of Assessment Appeals



Senior housing services can evolve across different senior housing products, including both single-family and multi-family housing products. For example, active adult properties or communities are essentially age-qualified housing (owner or renter) that offers some activities or socialization programs, while independent living housing offers additional services such as transportation, laundry, and meals. Continuing Care Retirement Communities, also known as Life Plan Communities, are facilities which typically offer a variety of independent living arrangements for residents, together with medical and nursing services, full central dining accommodations, and educational, recreational, and social activities for those who wish to partake of them. Active adult senior housing is a relatively new product, while traditional senior housing is composed of majority independent living, assisted living, or nursing care facilities.

Assisted living facilities and nursing homes often raise concerns about high cost, quality of care, and loss of autonomy while independent living communities generally have a more positive perception, offering autonomy and social engagement. The Covid-19 pandemic prompted individuals to reevaluate their long-term care plans and preferences in light of the risks associated with traditional senior housing facilities. Overall, the negative perceptions of traditional senior housing facilities have led many younger baby boomers to choose more independent housing options (e.g., active adult or independent living) or prioritize aging in place in order to avoid the financial and care-related challenges associated with institutionalized housing options. Age-restricted communities will likely evolve to offer a wider range of options, home modifications, and integrated healthcare services to meet the diverse needs and preferences of aging baby boomers desiring to age in place.



Figure 67: Services Provided Across Senior Housing Options

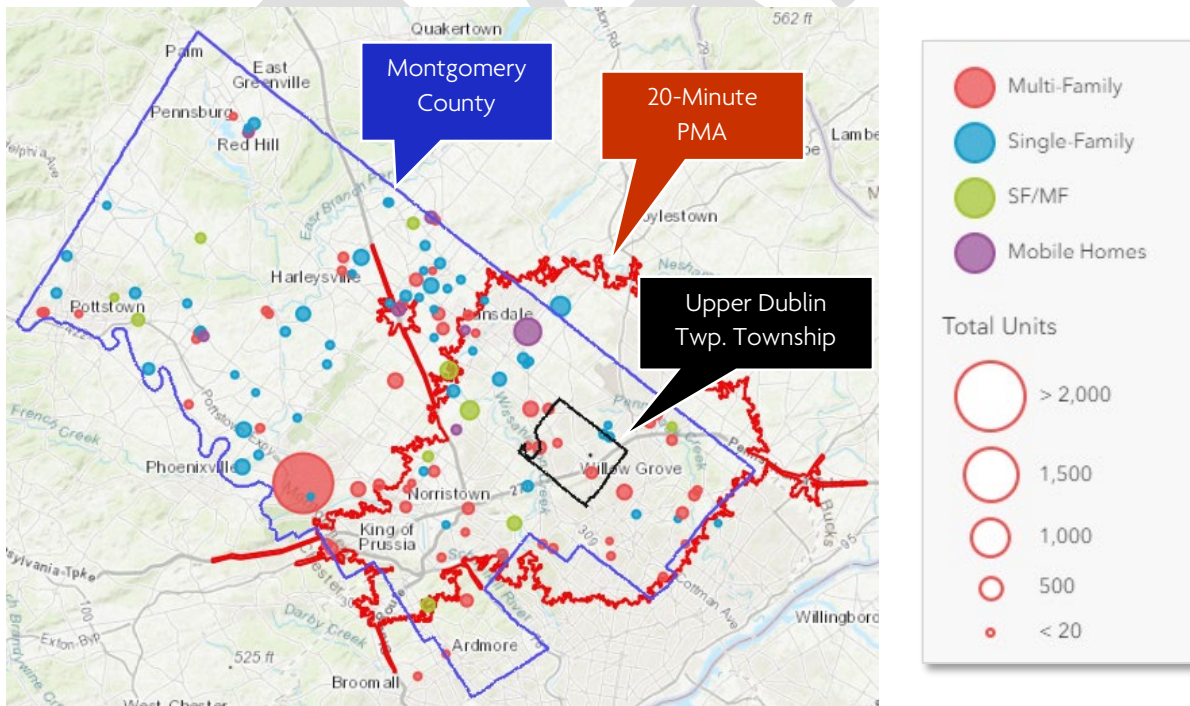
Source: Berkadia, Seniors Housing Active Adult, 2022 Report; Active Adult Rental Properties, Defining the Emerging Property Type, October 2022

Service	Conventional Housing	Active Adult	Independent Living	Assisted Living	Memory Care	Skilled Nursing
Shelter	X	X	X	X	X	X
Activities/Recreation		X	X	X	X	X
Socialization		X	X	X	X	X
Transport/ Laundry			X	X	X	X
Meals Included			X	X	X	X
ADL Services				X	X	X
Specialized Memory Care				X	X	X
Short-Term Post-Acute Care						X
Long-Term Chronic Care						X

*ADL (activities of daily living) services include medication management and assistance with bathing, dressing, and mobility.

Figure 68: Age-Restricted Housing Map

Source: MCPC, Montgomery County Board of Assessment Appeals





While the traditional senior housing market was profoundly impacted by the COVID-19 pandemic, the relatively new active adult senior housing product has been booming in recent years, largely due to the sizable baby boomer population that is aging yet remaining physically active. Active adult facilities typically command rent premiums and provide higher-end amenities, which are attractive to developers.

A 2022 report published by Berkadia, a national provider of senior housing data, indicates the market for active adult rental properties has enormous potential, due to several factors including a large and immediate demand pool (i.e., the aging baby boomer population), no required healthcare licensure, less operational intensity than senior housing, potential rent premium compared to conventional multi-family properties, and typically longer length of stay than that of senior housing residents or younger multi-family residents.

On average, active adult residents rent for six to nine years, with 80% retention in stabilized properties - making the active adult segment very attractive to risk-averse investors and developers once the properties stabilize. Active adult property rent rates are typically 10% to 30% higher than comparable multi-family in a given area, and anywhere from 30% to 50% lower than independent living properties in the market, depending on the level of luxury amenities offered. Active adult residents will pay a rent premium over conventional multi-family housing to live with their peers in a setting with a distinct lifestyle or culture but desire lower rents than independent living facilities.

According to data provided by the National Investment Center for Seniors Housing & Care (NIC), the traditional senior housing market (composed of majority independent living, assisted living, or nursing care facilities) was profoundly impacted by the Covid-19 pandemic but has been recovering at a steady pace, especially among majority independent living facilities. Throughout the end of 2022 and into the first half of 2023, the senior housing market is seeing two divergent trends: occupancy rates continue to recover while new supply eases, but the higher inflation environment has created an additional headwind through rising expenses and interest rate risk. According to data provided by NIC, independent living properties' average occupancy grew by 70 basis points to 86.1% in third-quarter 2023.

Figure 69: Senior Housing Market Fundamentals, 3Q23

Source: NIC, Seniors Housing Market Fundamentals Insights, 3Q23

	Seniors Housing		Nursing Care
	Majority Independent Living	Majority Assisted Living	Majority Nursing Care
Occupancy	86.1%	82.6%	82.4%
Annual Rent Growth	4.8%	6.1%	4.5%
Annual Absorption	3.2%	5.6%	2.8%
Construction vs. Inventory	4.6%	4.7%	0.2%
Annual Inventory Growth	1.2%	1.5%	-1.0%
Rolling 4-Quarter Starts vs. Inventory	1.6%	1.6%	0.0%



‘Missing Middle’ Housing Types

Missing Middle Housing is a range of house-scale buildings with multiple units – compatible in scale and form with detached single-family homes – located in a walkable neighborhood. They are “missing” because they have not been allowed in many communities’ zoning codes since the mid-1940s. They are known as “middle” because they sit in the middle of a spectrum between detached single-family homes and mid-rise to high-rise apartment buildings, in terms of form and scale, as well as number of units and often, affordability.

A greater variety of household sizes and demographics require a greater variety of housing choices. Suburbs that want to retain their gaining populations and attract newer, younger families, will need to create new, walkable urban environments and encourage the construction of Missing Middle Housing through rezoning and by providing public transportation options. When a variety of Missing Middle building types are combined in a neighborhood (and usually with detached single-family homes), this helps to provide enough households within walking distance to support local businesses and public transit.⁶⁹

Examples of missing middle housing types include duplexes, fourplexes, courtyard buildings, cottage courts, townhouses, multiplexes, and live-work housing. Opticos Design provides several design options to incorporate these housing types into communities.

Missing middle housing types can be integrated into existing block layouts/designs in multiple ways:

- Distributed throughout a block
- Placed on the end-grain of a block
- Transitioning to a commercial corridor
- Transitioning to higher-density housing

There are many barriers to building missing middle housing in municipalities with conventional zoning. Adopting a form-based code can encourage missing middle housing. Strong Towns suggests five items to consider in a zoning code to encourage construction of missing middle housing in communities:⁷⁰

1. Make sure non-single family uses are allowed across neighborhoods.
2. Make sure zoning code doesn’t put up obstacles – like setback requirements and minimum lot sizes, owner-occupancy requirements, etc.
3. Eliminate parking minimums.
4. Streamline the regulatory process.
5. Encourage single/small lot developments.

⁶⁹ [Opticos Design. 2024. Missing Middle Housing.](#)

⁷⁰ [Strong Towns. 2019. 5 Ways to Make the Missing Middle Less Missing.](#)

Characteristics of Missing Middle Housing

- Walkable context
- Small-footprint buildings
- Lower perceived density
- Smaller, well-designed units
- Fewer off-street parking spaces
- Simple construction



Source: [Alliance for Housing Solutions](#)



Source: [Opticos Design](#)



Housing Occupancy and Vacancy

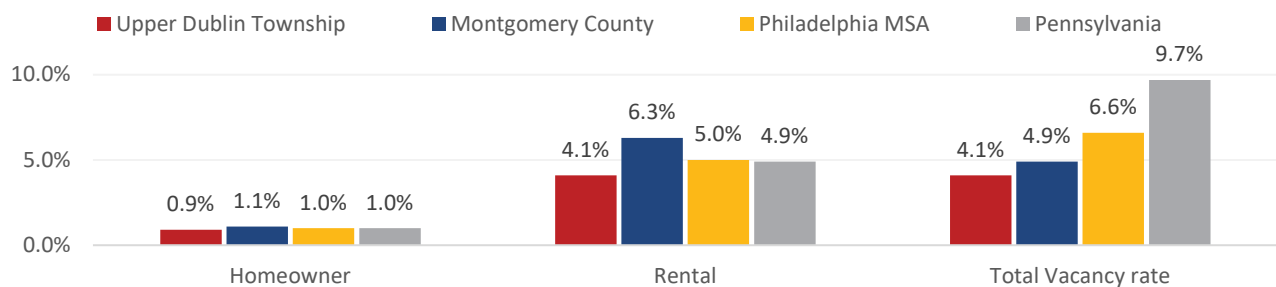
A relatively large share of housing in the township is owner-occupied (81%).

Residential supply and demand projections assume near-term projected vacancy rates provided by Esri for the 20-minute PMA. Esri projects that the housing vacancy rate in the PMA will be 5.6% by 2028. 4ward Planning assumes that the Township will maintain a natural average annual housing vacancy rate of 3.0%, allowing for housing turnover. The remaining vacant housing within the PMA (2.6%) is vacant due to physical obsolescence or seasonal, recreational, or occasional use. 4ward Planning assumes that a small portion (1.0%) of the remaining housing stock becomes obsolete annually.

Vacancies can occur naturally as properties are put up for sale or rent or undergo turnover between occupants. Typically, homeowners have a greater financial commitment to a property, leading to lower turnover and natural vacancy rates among ownership units. Conversely, renting offers more flexibility than homeownership, leading to higher turnover and vacancy rates among rental units. In 2022, the vacancy rate among ownership units in the Township (0.9%) was tight and lower than that in the county (1.1%). However, the vacancy rate among rental units (4.1%) was lower than that in the county (6.3%), suggesting the Township has a relatively tight ownership and rental housing market, an assessment confirmed by interviews with local real estate professionals and resident feedback during focus group meetings.

Figure 70: Detailed Vacancy Rates by Housing Tenure, 2022

Source: U.S. Census Bureau, American Community Survey 5-Year Estimates; 4ward Planning Inc., 2024



Senior Income and Tenure

Income levels among residents 55 and older can vary significantly, as some younger senior householders may be working into traditional retirement years, while older senior householders may be retired with incomes supplemented by pensions, savings, investments, or social security. Median household income levels among PMA seniors are highest among householders ages 55 to 64 (\$112,520), compared to those ages 65 to 74 (\$78,332), and those 75 and older (\$47,407). There are currently 37,946 PMA householders ages 65 and older (a number expected to increase to 49,614 by 2028) and with median annual incomes of up to \$79,000, these households present potential opportunities for market-rate active adult and independent living housing.



PMA residents age 65+ with annual median household incomes of up to \$79,000 present opportunities for market-rate active adult and independent living housing.

Figure 71: PMA Senior Householders with Median HH Incomes \$75,000 or Higher

Source: Esri

	Householder Age			Total 55+	Total 65+
	55-64	65-74	75+		
2023	36,027	24,702	13,244	73,973	37,946
2028	35,729	29,735	19,879	85,343	49,614

Homeownership rates typically decline as householders age and transition into senior housing. For example, in 2020, homeownership rates in the PMA ranged from 77% among householders ages 65 to 74, to 40% among householders 75 and older. This sharp drop in homeownership suggests PMA seniors begin to consider moving into renter-occupied housing in their mid-70s., as these seniors may no longer desire or be able to maintain their single-family homes or prefer to move into housing that offers greater freedom from maintenance and/or includes supportive services.

Figure 72: Median HH Income by Age of Householder, 2023

Source: Esri

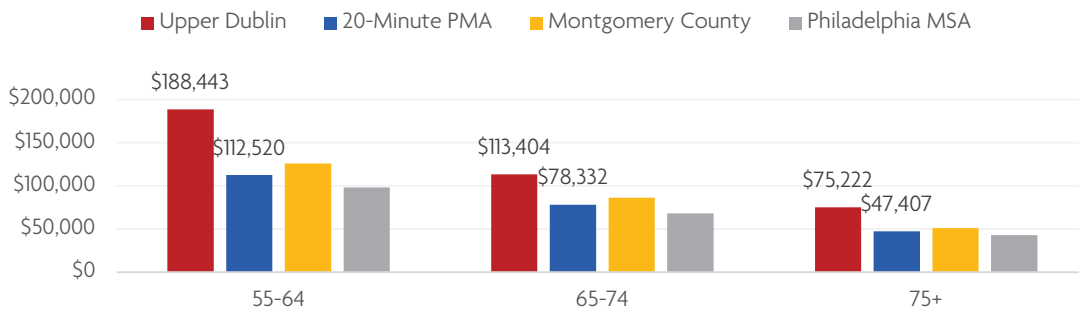
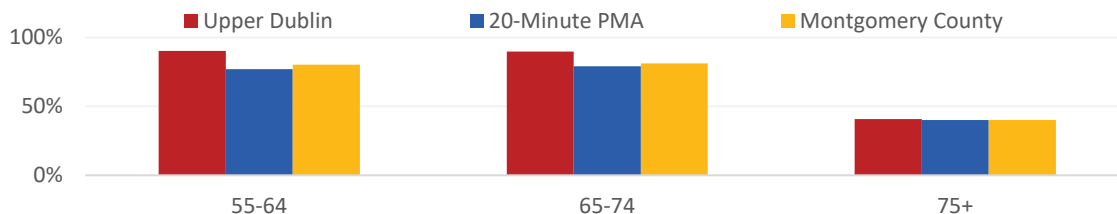


Figure 73: Homeownership Rate Among Senior Households, 2020

Source: Esri





Housing Costs

The median home value in the Township (\$481,854) is relatively affordable, given the Township’s median household income (\$155,407). For example, the Township’s median home value is equivalent to 3.1 times its median annual household income. For comparison purposes, the national median home value has been around five times the national annual median household income. While 23% of owner-occupied households pay more than 30% of their incomes on housing (considered housing cost-burdened by the U.S. Department of Housing and Urban Development (HUD)), it is a share less than that in the MSA (27%).

Figure 74: Housing Cost Metrics

Source: ESRI

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%

Figure 75: Affordable Income Limits and Monthly Housing Costs: Montgomery County, 2023

Source: HUD, FY 2023 HOME Income Limits effective date is June 15, 2023, Montgomery PA MSA

	Family Size			
	1	2	3	4
HUD Income Limits by Persons in Family				
Extremely Low (30%)	\$23,450	\$26,800	\$30,150	\$33,500
Very Low (50%)	\$39,100	\$44,650	\$50,250	\$55,800
Low (80%)	\$62,500	\$71,400	\$80,350	\$89,250
Affordable Monthly Rent/Mortgage Payment (30% of Monthly Income)				
Extremely Low (30%)	\$590	\$670	\$750	\$840
Very Low (50%)	\$980	\$1,120	\$1,260	\$1,400
Low (80%)	\$1,560	\$1,790	\$2,010	\$2,230

Conversely, in 2021, 42% of all renter households in the Township spent more than 30% of their monthly incomes on gross rent. The estimated median gross rent (contract rent plus the estimated average monthly cost of utilities) in the Township is approximately \$1,730 per month, which may be out of reach for many low-income households. In 2023, a two-person household in Montgomery County with an income of \$44,650 would qualify as a very low-income household (50% of AMI), and a two-person household with an income of \$71,400 would qualify as a low-income household (80% of AMI). Assuming a household can afford

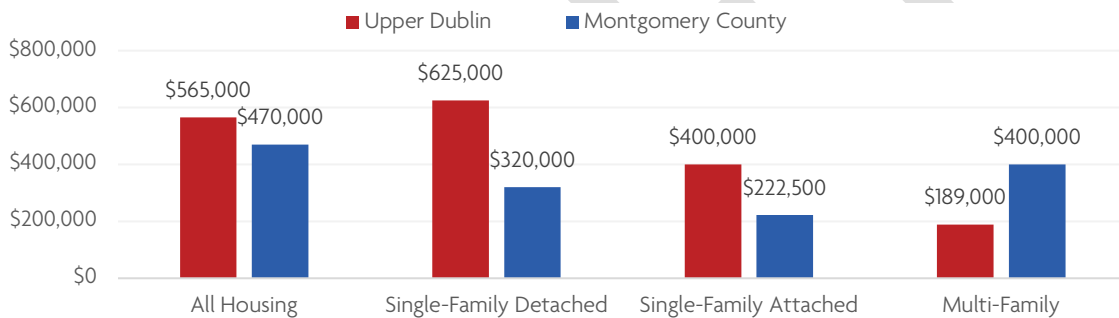


30% of its monthly income on housing, an affordable gross rent or mortgage payment would be \$1,120 per month for a two-person very low-income household and \$1,790 per month for a two-person low-income household.

According to housing sales data provided by the Montgomery County Planning Commission, Upper Dublin Township had a median sales price of \$565,000, with this sales price highest among single-family detached homes (\$625,000) and lowest among multi-family properties (\$189,000). From 2021 to 2022, the median sales price in the Township increased by \$50,000 (or by 9.7%), suggesting there is significant demand for housing in the Township. Despite an increase of interest rates over the course of 2022, housing demand continued to be strong in both the Township and county, which was confirmed by interviews with local real estate professionals.

Figure 76: Median Sales Prices, 2022

Source: MCPC, Montgomery County Board of Assessment Appeals, 2022 Median Prices for Housing



Affordable Housing

The MontCo Homes for All Plan details that the affordable housing crisis is getting worse nationally. The plan is a collaboration between Montgomery County Office of Housing and Community Development, Montgomery County Planning Commission, and the Montgomery County Commerce Department. Given that housing is a social determinant of health, it is essential to address affordability challenges in the County. Nationally, health system and corporate investments in workforce and affordable housing are growing. Formal public-private partnerships are a promising way to raise local visibility, funding, and public support for affordable housing. The plan also recognizes that changing public perceptions about the phrase “affordable housing” requires a strategic communications campaign, and advancing social equity is becoming an essential component of affordable housing strategy and practice.

Between 2012 and 2017, the national inflation rate was 4.3%, while the county’s median housing sales price increased by 11.8%, and the median gross rent increased by 10.6%. An increasing number of seniors cannot afford to age in place. With current economic conditions, older homeowners may have lost value in their



homes, making it harder to sell a home to move into a more appropriate living situation. People live together for a variety of valid reasons, but nontraditional households may not be best served by a traditional single-family home. Further, households are growing but the number of households with children under the age of 18 are declining as a percent of all households. The plan notes that, “a married couple with two children are just as likely to be looking for a home as a single parent, a multigenerational household, or a small group of friends embarking on their adult lives.” Nearly 50% of renters are rent burdened, paying over 30% of their monthly income on housing costs, often at the expense of their health. ⁷¹ These figures show that more affordable options are needed in the County and there is a market for them in Upper Dublin Township.

Workforce housing (housing that is affordable to the working public) is a major focus of MCPC. This is further defined as housing provided by the private sector or public-private partnerships that is aimed at middle- and moderate-income residents making between 80%-100% of the area’s median income. Some workforce housing initiatives consider households that make as much as 115% of an area’s median income eligible for assistance. This price point corresponds to residents who make too much money to qualify for traditional housing subsidies but not enough to afford local market-rate homes. This can include teachers, health care workers, childcare workers, municipal employees, retail salespeople, police/fire personnel, etc.⁷²

There are many benefits to having workforce housing in your community:

- Encourages diverse communities and provides opportunities for families to continue living in the same community – even as children leave the home or seniors retire and sell the “homestead”
- Gives some of the 201,000 workers who commute into the county the opportunity to live here
- Reduces commuting time and traffic congestion by allowing people to live closer to their jobs
- Permits essential members of the workforce – teachers, nurses, sales clerks, hairdressers, etc. – to live near their place of employment
- Attracts young professionals to jobs and communities in the county
- Strengthens the economy by helping employers attract and retain critical workers

MCPC suggests the following strategies to “help residents more easily afford a place to live”:

- Housing for all income levels should be encouraged in and around employment centers. This would allow more people to live closer to where they work and have better access to transportation, lessening traffic congestion and air pollution concerns at the same time. Something as simple as a shorter commute could also boost worker morale and productivity, curb tardiness, and make for workers who are more dedicated to their jobs.

⁷¹ [Montgomery County. 2021. Homes for All: A Plan for Montgomery County, PA.](#)

⁷² [MCPC. 2024. Workforce Housing.](#)



- Municipal governments can encourage more affordable homes by adopting zoning and subdivision ordinances with the right incentives and standards for homes that are within reach of the county's workforce. They can also push for innovative site plans with higher-density development.
- Developers can contribute to the county's affordable housing stock by utilizing innovative site design (i.e., zero lot line lay-outs) or making use of cost-saving techniques like clustering homes on smaller lots or building narrower and/or shorter streets to reduce the cost per unit.
- Employer-assisted housing is a successful way of getting employees to live closer to their jobs, and a way of providing stability to local neighborhoods. For an employer, it could mean less employee turnover, which translates into huge savings. For example, the University of Pennsylvania provides incentive programs to encourage employees of the university and the health system to purchase homes in specific parts of West Philadelphia.

Studies have shown that new affordable housing developments do not necessarily have a negative effect on property values, especially if well integrated into a neighborhood. Property values are determined by the condition of the property or housing that is for sale, other area developments, and local prosperity – not the location of affordable workforce housing. In many cases, affordable housing has an overall positive impact on neighboring properties.⁷³

Municipalities are addressing workforce housing shortages are adopting incentives or mandates for workforce housing construction, subsidizing landlords that limit rent increases, and investing in new construction. Communities can also encourage workforce housing through zoning.⁷⁴

- Zone more land for higher-density housing.
- Reduce minimum lot size.
- Allow more townhouses, twins, and apartments.
- Allow accessory dwelling units.

MCPC suggests streamlining review and approval processes and cutting down on unnecessary costs as ways to minimize barriers to affordable homes. Strategies to cut down on unnecessary costs include:⁷⁵

- Allow for narrower streets.
- Allow for roads with shorter lengths.
- Reduce parking requirements and parking space dimensions when possible.
- Consider modifying sidewalk requirements.

⁷³ [MCPC. \(2024\) Promoting Workforce Housing: The Workforce Housing Dilemma.](#)

⁷⁴ [MCPC. \(2024\) Promoting Workforce Housing: Expanding Locations and Development Potential.](#)

⁷⁵ [MCPC. \(2024\) Promoting Workforce Housing: Eliminating Unnecessary Development Costs.](#)



- Reduce lot sizes, setbacks, yard requirements, and lot dimensions.
- Utilize stormwater best management practices.
- Create opportunities for clustering.
- Provide incentives for higher-density development.
- Permit mixed residential types and a mix of uses in appropriate districts.
- Create flexible landscaping requirements.

Housing costs can also be reduced through energy efficient options for homes, including constructing smaller buildings, and using passive solar design, insulation options, solar hot water heaters, energy-efficient appliances, photovoltaic technology, and landscaping.⁷⁶

Future Demand

Unmet housing demand estimates are projected out ten years and are presented as residential units (inclusive of affordable units) prospectively captured within the Township over a ten-year period. Residential supply and demand projections assume near-term annual household and housing unit growth projections provided by Esri for the 20-minute PMA. By 2028, Esri projects that the number of households in the PMA will increase by 4,044 (0.3% per year) and the number of housing units in the PMA will increase by 4,340 over the next five years (0.3% per year). Upper Dublin has potential to support between 844 and 1,407 additional housing units by 2028 (in addition to those already approved for construction).

This is largely due to existing pent-up demand from primary workers who commute into the Township, by 2028, there will be an estimated net demand for approximately 14,070 residential units in the PMA. If buildable residential land were available in the Township, 4ward Planning conservatively assumes that the Township could have an opportunity to capture between 6% and 10% of pent-up residential demand in the PMA, equivalent to between approximately 844 and 1,407 units by 2028. Interviews with local real estate professionals suggest there is demand for more diversity of housing types in the Township, including more townhome and single-floor living options.

According to 2021 primary job data provided by the U.S. Census Bureau, currently, 71% of primary workers commute from outside the PMA. In order to calculate pent-up housing demand from commuting workers, 4ward Planning projected primary job workers within the PMA based on 2021 primary worker data provided by the U.S. Census Bureau and average 2020 to 2030 industry employment growth rate projections provided by the Pennsylvania Department of Labor and Industry for Montgomery County. 4ward Planning assumes that that 5% of PMA workers would trade their commute if adequate housing were available in the PMA.

⁷⁶ [MCPC. \(2024\) Promoting Workforce Housing: Cutting Building Costs, Not Quality.](#)



4ward Planning conservatively assumes that between 3% and 5% of unmet housing demand from commuting primary workers in the PMA could be accommodated in the Township.

The near-term increase in 20-minute PMA residents ages 65+ should drive additional demand for senior housing, which could be captured in the Township. Consideration should be given to marketing new units as “age-targeted” rather than “age-restricted,” in preparation for longer-term population shifts and changing demand.

While those ages 55 and older represent the potential target market for senior housing, the largest demand for active adult and independent living units is expected to come from residents ages 65 and older. The figure below compares the age distribution of people ages 55 and older in the 20-minute PMA across time. Largely due to the aging of the sizable baby boomer population (representing those currently between ages 59 and 77), the number of older adults (55-plus) living in the PMA has been increasing over the past two decades and is expected to continue in the near term. While those ages 55 and older represented just 29% of PMA residents in 2010, this segment will represent 36% of the PMA’s population by 2028. Near-term senior housing demand in the PMA will be significantly driven by those ages 65 and older, who largely represent the target market for senior housing (average age for active adult and independent living housing is 73 years and mid-80s, respectively). From 2023 to 2028, PMA residents ages 65 and older are projected to increase by 15,315 (an 11% increase).

Figure 77: Township Net Dwelling Unit Demand Through 2028

Source: 4ward Planning, Inc.

	2023	2028
Housing Demand Metrics		
Estimated Households in 20-Minute PMA (0.3% growth rate)	267,608	271,652
Estimated Primary Workers in 20-Minute PMA (0.9% growth rate)	370,550	387,530
Estimated Primary Workers Residing Outside 20-Minute PMA (71%)	262,830	274,490
Estimated Pent-Up Housing Unit Demand from Commuting Area Workers (5%)	13,142	13,720
Estimated Number of Naturally Occurring Vacant Housing Units (3%)	8,500	8,630
Estimated Aggregate Housing Unit Demand in 20-Minute PMA	289,249	294,002
Housing Supply Metrics		
Estimated Housing Units in 20-Minute PMA	283,330	287,670
Physically Obsolescent Units (2.6% of total units, 1% annual obsolescence rate)	7,367	7,740
New Units Added in 20-Minute PMA (0.3% growth rate)		4,340
Estimated Net Marketable Housing Units in 20-Minute PMA	275,963	279,930
Net Housing Demand/Supply Calculation		
Estimated Aggregate Housing Unit Demand in 20-Minute PMA	289,249	294,002
Subtract Estimated Net Marketable Housing Units in 20-Minute PMA	275,963	279,930
Net Housing Unit Demand/(Excess Units)	13,286	14,072
	Township Unit Capture (6%)	844
	Township Unit Capture (10%)	1,407



Figure 78: 55-Plus Population Age Distribution: 20-Minute PMA

Source: ESRI

Age Cohort	Total Population				Population Change	
	2010	2020	2023	2028	2020-2023	2023-2028
55-64	81,903	95,170	92,775	84,252	-2,395	-8,523
65-74	50,694	73,496	79,299	82,862	5,803	3,563
75+	52,083	58,553	65,731	77,483	7,178	11,752
Total 55+	184,680	227,219	237,805	244,597	10,586	6,792
Total 65+	102,777	132,049	145,030	160,345	12,981	15,315
Share of Total Pop 55+	29%	34%	35%	36%		
Total Pop. (All Ages)	633,651	668,869	675,230	678,513	6,361	3,283

Renter Demand Drivers

- Favorable millennial demographics / Renters-by-choice
- Rising for-sale housing costs
- High cost of homeownership
- Increasing need for financial flexibility
- Remote work – and the need for more space
- Population migration patterns / Appeal of less dense neighborhoods
- Access to outdoor space / amenities

Investor Demand Drivers

- Outsized rent growth and low vacancy rates
- Strong net absorption and lower resident turnover
- Diverse set of consumers
- Product diversification (multi-asset investors)
- Exit optionality
- Relatively low institutional exposure to date

Build-to-Rent Market

According to CBRE Research, build-to-rent (BTR) developments are new residential communities that have the characteristics of single-family homes (no residents living above or below) but built for renters desiring features not typically offered with multi-family properties. Most BTR properties consist of 50 or more homes or townhomes, typically between six to 12 dwelling units per acre. BTR properties are owned by a single entity and are professionally managed. BTR communities are typically located in less dense suburban or exurban locations within a one-hour commute of an urban center. While many BTR properties offer some community amenities like walking trails, green spaces, and dog parks, some also offer more significant amenities like swimming pools, clubhouses, and gate access. The BTR sector has experienced significant growth in recent years, driven by factors such as changing demographics, lifestyle preferences, and a shortage of affordable housing options for renters. Multiple factors create compelling fundamentals for driving rent growth: including a national housing shortage, a surge of millennials creating families and outgrowing traditional apartments, baby boomers downsizing (with some choosing the flexibility and low-maintenance lifestyle of renting), an increased housing demand in suburbs and exurbs accelerated by Covid remote work trends, and a limited BTR supply, exacerbated by a constrained construction lending environment and entitlement challenges in many locations.

Figure 79: BTR Product Groupings

Source: CBRE Research, Build-to-Rent (BTR) Overview, Intelligent Investment, June 2023

Product Type	Product Description	Typical Home Size Range		Typical Density (Dwelling Units/acre)
		Smaller	Larger	
Horizontal Multi-Family	Small single-family detached and attached homes	650 SF 1 Bed/1 Bath	1,400 SF 3 Bed/2 Bath	12
Two-Story Townhomes	Homes in two- to seven-unit building configurations	1,300 SF 2 Bed/2 Bath	1350 SF 4 Bed/25 Bath	10
Cottages	Detached or attached single-family homes on smaller lots	1,300 SF 2 Bed/2 Bath	1,750 SF 4 Bed/25 Bath	10
Traditional Single-Family	Detached homes on traditional lots	1,400 SF 3 Bed/2 Bath	2,000 SF 4 Bed/3 Bath	8
Luxury Single-Family	Detached and attached homes on individual lots	2,000 SF 3 Bed/2 Bath	2,800 SF 4 Bed/3.5 Bath	6





Transportation

Local and Regional Transportation Planning

Local and regional transportation planning in Upper Dublin Township is led by key agencies such as the Delaware Valley Regional Planning Commission (DVRPC) who oversee transportation planning for the region. Additionally, the Montgomery County Planning Commission plays a key role in county transportation planning. These agencies collaborate with the Township to create a balanced and efficient transportation system that caters to the needs of residents, businesses, and visitors. Integral to this process are the Long-Range Transportation Plan (LRTP) and the Transportation Improvement Program (TIP). The region's LRTP, Connections 2050, outlines a strategic vision for the region's transportation network over the next 20 to 30 years, focusing on major projects and policy initiatives aimed at meeting future demand and promoting sustainability and is currently undergoing an update. Meanwhile, the TIP identifies and prioritizes short-term transportation projects and funding over a four-year period. There are currently four TIP projects ongoing in UDT for the FY23-FY26 focusing on multi-modal improvements and infrastructure rehabilitation.

Policy Considerations

As the plan was developed several policy considerations were taken into account. In terms of county policy, there are a few plans that affect how the Montgomery County Planning Commission will plan for the future.



For instance, the Montgomery County Complete Streets Policy calls for the MCPC to advocate for a Complete Streets design approach when working with partner agencies on their projects, whether public or private. This principle derives from the County's Comprehensive Planning processes. When developing Montco 2040, increasing walkability was a recurrent comment from residents which led to the development of the walkability and bikeability county plans. Policy primarily guides how the county will upgrade and improve its roads, bridges, and other facilities, such as parks and buildings, making them accessible to all travel modes where practiced. The County Planning Commission developed several reports to improve multi-modal connections in the county. [Walk Montco](#), [Bike Montco](#), and [Montgomery County Trail Access, Diversity, & Awareness](#), all detail goals and strategies to expand safe and accessible connections to all communities in the county. One goal from Bike Montco was to create a county Complete Streets policy



that directs county departments to advocate and petition for Complete Streets on projects where the department is not the lead agency but has a seat at the table in the decision-making process. Montgomery

Additionally, Montgomery County has adopted a “Health in All Policies” approach, which recognizes that diverse governmental entities and stakeholders have a role to play in attaining the highest level of health for all people and simultaneously advancing other goals such as promoting economic stability, transportation access and mobility, environmental sustainability and educational attainment.

Figure 80: Complete Streets Example

Source: National Complete Streets Coalition



Transportation Costs

Transportation costs refer to the cost of getting around for a household or community. The Housing and Transportation Affordability Index provides a comprehensive view of affordability for a community, which includes the cost of housing and transportation at the neighborhood level. According to this index, 73.4% of UDT residents pay 18-22% of their income on transportation costs. 26.2% of residents pay 22-26% of their income on transportation costs. These costs are in addition to necessary costs such as those related to housing. By evaluating the cost of getting around as part of income based on where someone lives, communities can have a complete understanding of affordability.

Figure 81: Transportation Costs for Upper Dublin

Source: H+T Index (2024)

Transportation Costs % Income	CENSUS TRACTS							TOTAL
	2014.07	2014.06	2014.08	2014.09	2014.10	2014.11	2014.04	
< 8-18 %	0	0	0	0	0	0	0	0
18-22%	1,420	2,678	2,704	3,131	2,385	2,755	4,241	19,314
22-26%	1,229	2,140	1,400	1,329	0	0	915	7,013
26%+	0	0	0	0	0	0	0	0
Total								26,325



Roadway Conditions and Trends

Upper Dublin is serviced by several major transportation corridors. These corridors facilitate travel within the Township and connect it to surrounding areas. These routes include:

1. **Pennsylvania Route 309:** This is one of the major highways passing through Upper Dublin, providing a north-south route that connects to the PA Turnpike and extends north towards the Lehigh Valley.
2. **Welsh Road:** This east-west route passes through Upper Dublin, linking to PA 309 and extending east towards Willow Grove and beyond.
3. **Limekiln Pike:** This road runs north-south and intersects with PA 309, providing access to residential and commercial areas within the Township/
4. **Fort Washington Expressway (Pennsylvania Route 309 Expressway):** A limited access highway portion of PA-309 that serves as a major commuter route, connecting Upper Dublin to the Pennsylvania Turnpike and Philadelphia
5. **Bethlehem Pike:** A key north-south route that runs parallel to PA 309, connecting Upper Dublin to Philadelphia.

Road Classifications

Road classifications play a crucial role in defining the transportation infrastructure that serves its residents and businesses. The Township's roads are typically categorized based on their function and capacity to accommodate different types of traffic. Major highways such as PA 309 and Welsh Road are primary arteries, facilitating regional connectivity and linking the Township to nearby communities. These roads are designed to handle higher volumes of traffic. Secondary roads like Bethlehem Pike complement the primary routes by providing additional local access and connectivity within the Township.

Traffic Volumes

Data from the Pennsylvania Department of Transportation (PennDOT) was obtained to conduct a study of how annual average daily traffic on state roadways. Due to the Township's proximity to major roadways, transportation stations, and business parks in the greater Philadelphia region, the road network tends to be prone to traffic during peak travel hours. For instance, the Fort Washington Interchange and Virginia Drive Interchange, are the only interchanges until Upper Moreland Township. Roads surrounding these interchanges, including Pennsylvania Avenue and Susquehanna Road see some of the highest annual average daily traffic within the Township at 14,000-16,000 cars per day.

Crash Trends

Vehicle crash data from PennDOT was obtained and compiled to determine which sections of roadways in Upper Dublin Township over the years. Upper Dublin Township experienced a total of 3,035 crashes from 2015 – 2022. Out of the total number of crashes, 16 had fatalities. From the map provided in this section, it



is apparent that crashes occur throughout the Township. However, there are a few clusters of roads that see a higher number of incidents. The following clusters are listed as follows:

- Due to the annual average daily traffic, Interstate 276 and Route 309 remain one of the hottest corridors in terms of crashes and fatalities. However, the bypass by Route 309 between Pennsylvania Avenue and Commerce Drive sees the highest number of crashes at 84 and has one fatality;
- Dresher Triangle with 98 crashes; and
- Norristown Road between Butler and Welsh Rd with 97 crashes.

Crashes Involving Pedestrians

Between 2015 and 2022, there were a total of 15 reports of a motor vehicle hitting one or more pedestrians in Upper Dublin Township with 2 crashes resulting in fatalities. When mapped, Susquehanna Rd has the most consecutive number of crashes at 4. Out of these four, one of these resulted in a fatality. A larger concentration is surrounding The Woods and The Estate of Upper Dublin. While this cluster of pedestrian incidents could be the result of higher pedestrian and vehicle traffic in the area, it dwarfs any other concentration in Upper Dublin Township. This may suggest that there is a mismatch between pedestrian needs and the existing infrastructure in this part of the Township.

Public Transportation

The Southeastern Pennsylvania Transit Authority (SEPTA) provides two major public transportation services, bus, and rail, to the Township. These transportation links join residents from Upper Dublin and surrounding Townships to the Northeast Corridor. These routes include:

- Fort Washington Station – North to Doylestown and south to Center City Philadelphia’s 30th Street Station.
- Bus 95 –Gulph Mills Station – Connects Gulph Mills Station near Conshohocken to Willow Grove Mall
- Bus 201 – Fort Washington Office Center – Connects Pennsylvania Avenue to the Fort Washington Business Park.
- Bus 94 – Montgomery Mall – Connects the Chestnut Hill Historic District on Germantown Avenue to the Montgomery Mall in Montgomeryville.

Generally, bus routes run on a 30-minute to an-hour schedule at each bus stop along their routes starting at around 7:00 am until 7:00 pm. On Sundays, bus service is more limited with service being suspended on Sundays on the 95 and 201 bus routes. Bus routes cost \$2.00 for adults and regional rail anywhere from \$3.75-\$8.75 depending on trip distance. Children under 12 with an accompanying adult and senior citizens 65 and over can ride for free on both SEPTA buses and regional rail.



SEPTA's Bus Revolution which is currently ongoing will potentially affect bus route 95. If the proposed changes are accepted, the Township will no longer have access to this route severing the transit connection to Conshohocken.

Figure 82: Annual Average Traffic

Source: PennDOT (2023)

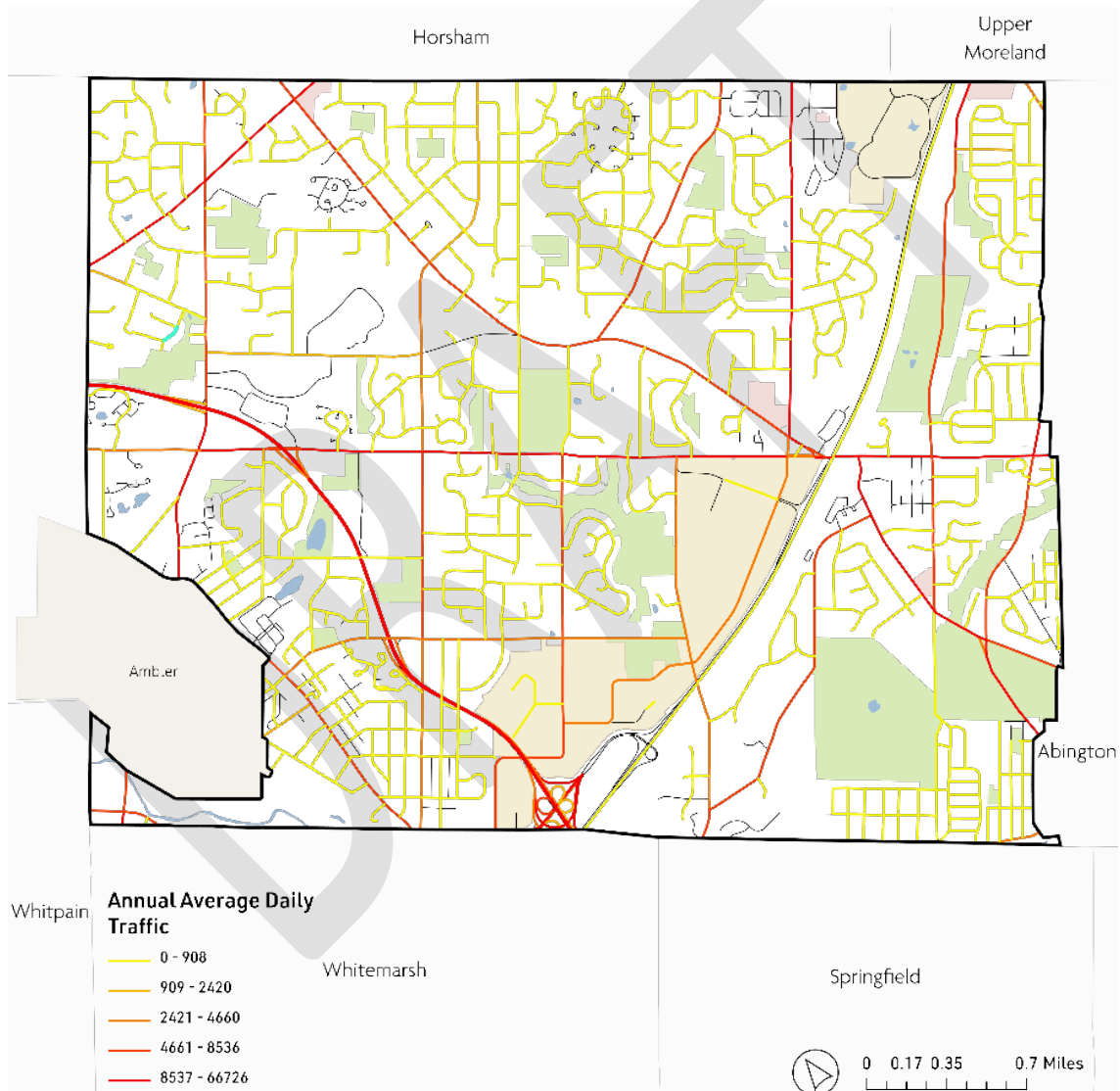


Figure 83: Crash Density Map

Source: PennDOT (2024)

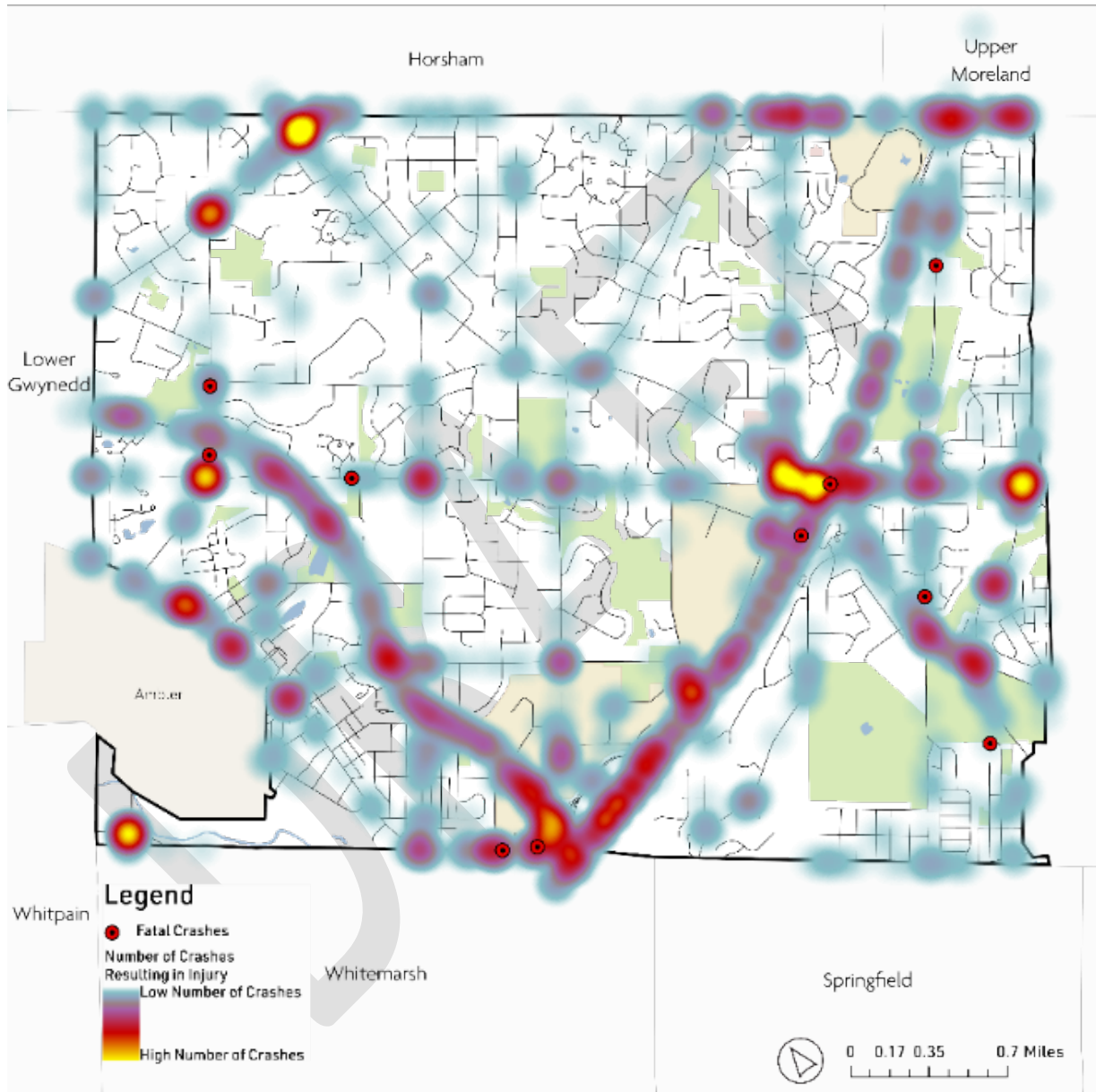
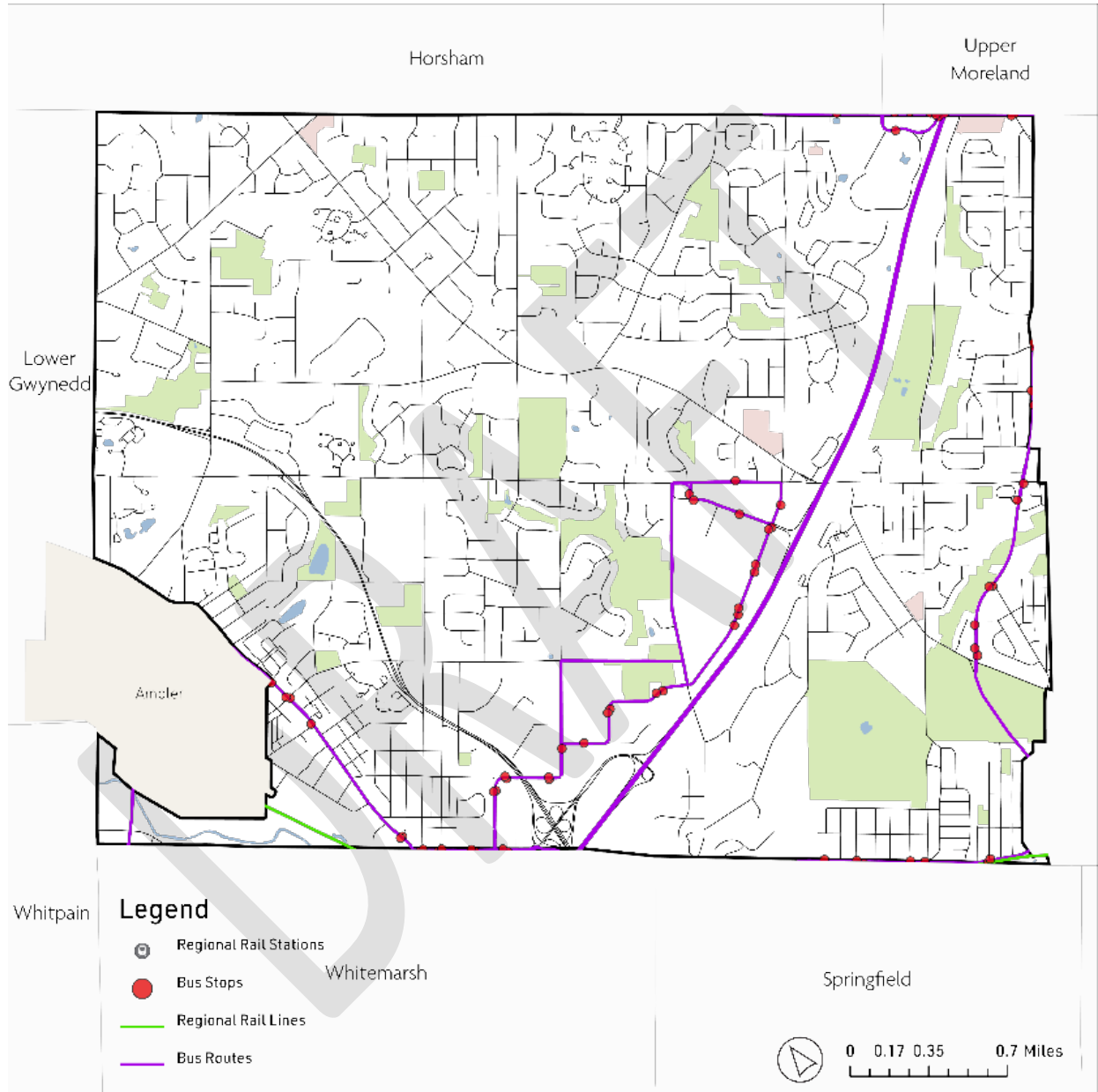


Figure 84: Map of Public Transportation Network

Source: SEPTA (2024)



Pedestrian Network

Sidewalk Connectivity

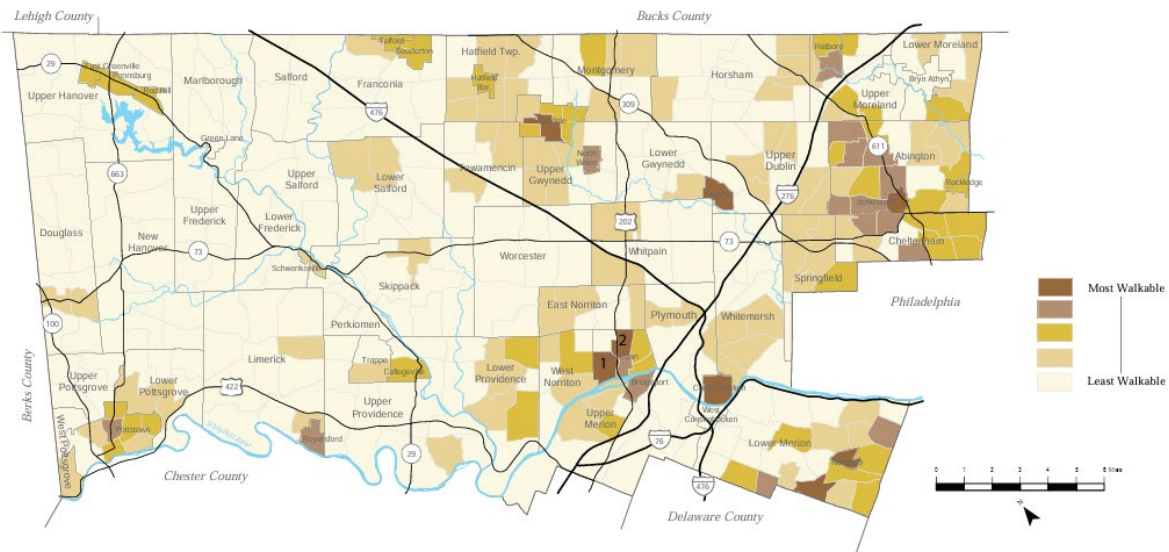
The existing pedestrian network in the Township reflects the more urban development pattern consistent with the greater Philadelphia region. The area lends itself more to pedestrian circulation in contrast to more rural areas seen the farther municipalities get from the epicenter of the Philadelphia area.

Sidewalks are the most important connecting feature of the pedestrian environment and many lie within existing residential communities and Township parks, however, many areas of the Township lack connectivity to nearby regional destinations such as parks or shopping centers like Maple Glen or Dresher Triangle. While the condition and compliance of the sidewalks have not been reviewed, breaks and obstructions in pedestrian connectivity have. According to DVRPC’s sidewalk gap analysis, there are significant gaps in the pedestrian network along major roads such as Dreshertown Road, Fort Washington Avenue, and Limekiln Pike preventing residents from accessing nearby businesses and amenities on foot. According to *Walk MontCo*, much of UDT is classified as the “least walkable” area in Montgomery County with the neighboring municipality of Ambler Borough, classified as one of the most walkable areas in the County. For this reason, all of the Township is recommended for

Figure 85: Countywide Walkability

Source: *Walk Montco* (2018)

Countywide Walkability

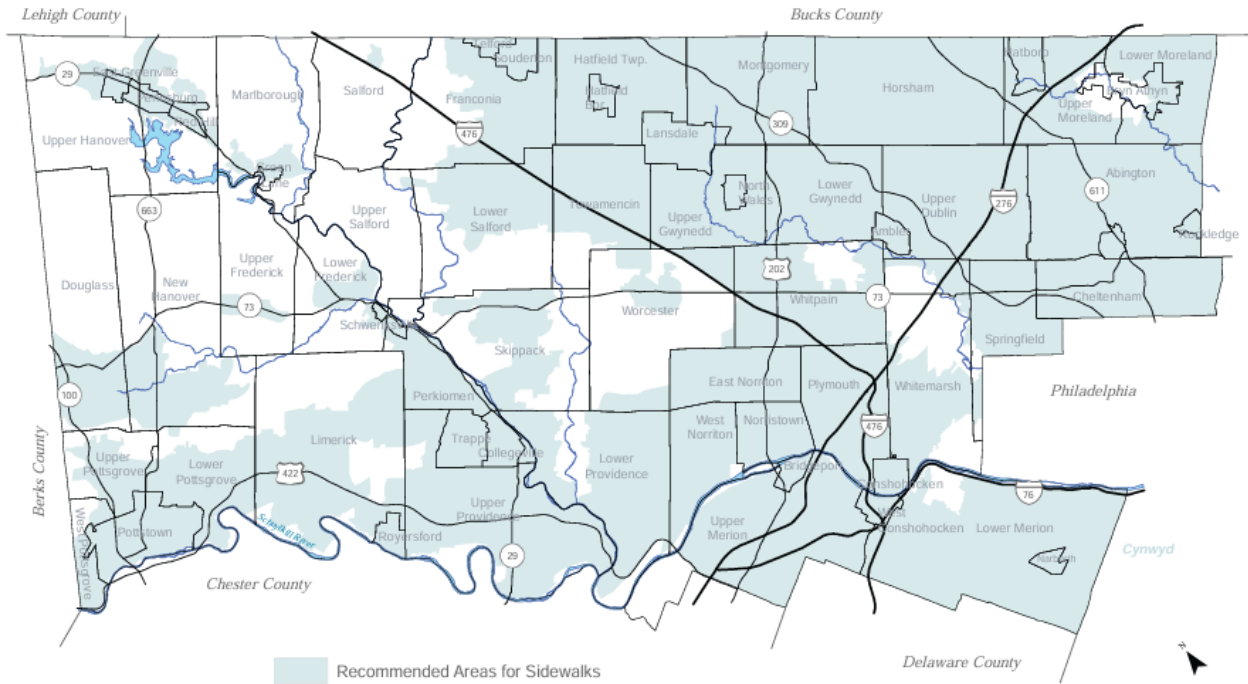


Source: Montgomery County Planning Commission and Board of Assessment data.
(Please note: this analysis includes sidewalks and is an update of the map found in Montgomery County Today.)



Figure 86: Recommended Areas for Sidewalks

Source: Walk Montco (2018)



Walkability is crucial to increasing a community’s quality of life. There are many benefits to a community’s health, environment, and equitability. For instance, an increase in walking can reduce body fat lower blood pressure, and can reduce the risk of diseases including diabetes, depression, and anxiety. Surveys ⁷⁷have shown that between 66% and 80% of adults do not meet the recommended 30 minutes of daily physical activity five times per week. As for benefits to the environment, short vehicle trips are the worst in terms of emissions released. About 60% of the pollution created by vehicles happens in the first few minutes of operation. Shorter trips are more polluting on a per-mile basis than longer trips. Additionally, walkability can both increase safety and equity by investing in better pedestrian infrastructure and doing so in varying types of communities.

⁷⁷ Walkability and Your Community: Health, Safety, and Economics. 2016. Montgomery County Planning Commission. Accessed from:.



Walkability can be improved by increasing the number of pedestrian infrastructure improvements such as increasing the number of sidewalks, ADA compliance, traffic calming measures, and pedestrian-friendly intersections.

Bicycle and Trail Network

Support for multi-modal transportation and a desire for these options to be improved within the Township was an identified priority from the past comprehensive plan.

Bicycle Routes

The Cross County Trail serves Upper Dublin Township. This trail runs from Pennsylvania Avenue in the southwestern section of the Township near Pennsylvania Avenue to the eastern section near The Promenade and Welsh Rd. Aside from the Cross County Trail, Susquehanna Road also has a bike lane, which, so far, is the only bike-friendly facility within the Township. However, there are two proposed bike lanes as part of Upper Dublin’s Parks and Recreation Plan along Fort Washington Avenue and Pinetown Road.

Bicycling has many benefits. It can improve fitness, reduce traffic congestion, enable mobility for the careles population, promote sustainability, promote economic development, and more⁷⁸. To reap the benefits of biking, ensuring low-stress routes for cyclists is essential. According to DVRPC’s Biking Level of Traffic Stress (LTS) mapping tool⁷⁹, there are several moderate and high traffic stress on Upper Dublin roads. Roads labeled moderate or high traffic stress are characterized as multilane, fast-moving traffic and comfortable for those already biking in American cities.

Figure 87: Moderate- and High-Traffic Stress Routes

Source: DVRPC (2021)

Moderate Traffic Stress	High Traffic Stress
Ft Washington Ave	S Bethlehem Pike
Jarrettown Rd	Pennsylvania Avenue
Tennis Ave	Rt 309
Camp Hill Rd	Commerce Drive
Pinetown Rd	Limekiln Pike
Twining Rd	Dreshertown Rd
Susquehanna Rd	Welsh Rd
Loch Alsh Ave (leads to Upper Dublin High School)	E Butler Pike
Meetinghouse Rd (by Temple Ambler Campus)	S Bethlehem Pike

⁷⁸ https://www.montgomerycountypa.gov/DocumentCenter/View/21389/Bike-Montco-Book-2018_ADOPTED?bidId=

⁷⁹ <https://www.dvrpc.org/webmaps/bike-lts/analysis/>



In addition to outlining the number of moderate and high-traffic stress routes, priority connections were also outlined in order to increase efficiency in connectivity improvement projects.

Figure 88: Priority Connections to Amenities

Source: DVRPC (2021)

Priority Connections to Schools	Priority Connections to Transit	Priority Connections to Trails
<ul style="list-style-type: none"> • Tennis Ave from N Bethlehem Pike to Welsh Rd • Norristown Rd from E Butler Pike to Welsh Rd, and beyond to Horsham • E Butler Pike from Norristown Rd to Tally Ho Drive • Loch Alsh Ave from Farm Ln to the High School 	<ul style="list-style-type: none"> • Tennis Ave from N Bethlehem Pike to Welsh Rd • E Butler Pike from Tally Ho Dr to Norristown Rd, Norristown Rd to Welsh Rd • Pennsylvania Ave turnpike off ramp to Indiana Ave • Pennsylvania Ave from Park Ave to Jackson Ave 	<ul style="list-style-type: none"> • Tennis Ave from Cove Rd to Norristown Rd • Highland Ave from S Bethlehem Pike to Pinetown Rd • Camp Hill Rd from Scott Ln, under turnpike overpass, to Camphill & Highland Athletic Complex on Highland Ave • Pennsylvania Ave from Camp Hill Rd to Bridge Street

The *Montgomery County Trail Access, Diversity, & Awareness Plan* outlined several keys to increasing trail accessibility as follows:

- Signage and connectivity
- Gateway and trailhead improvements
- Corridor improvements
- Public art
- Programming and events
- Marketing and communications

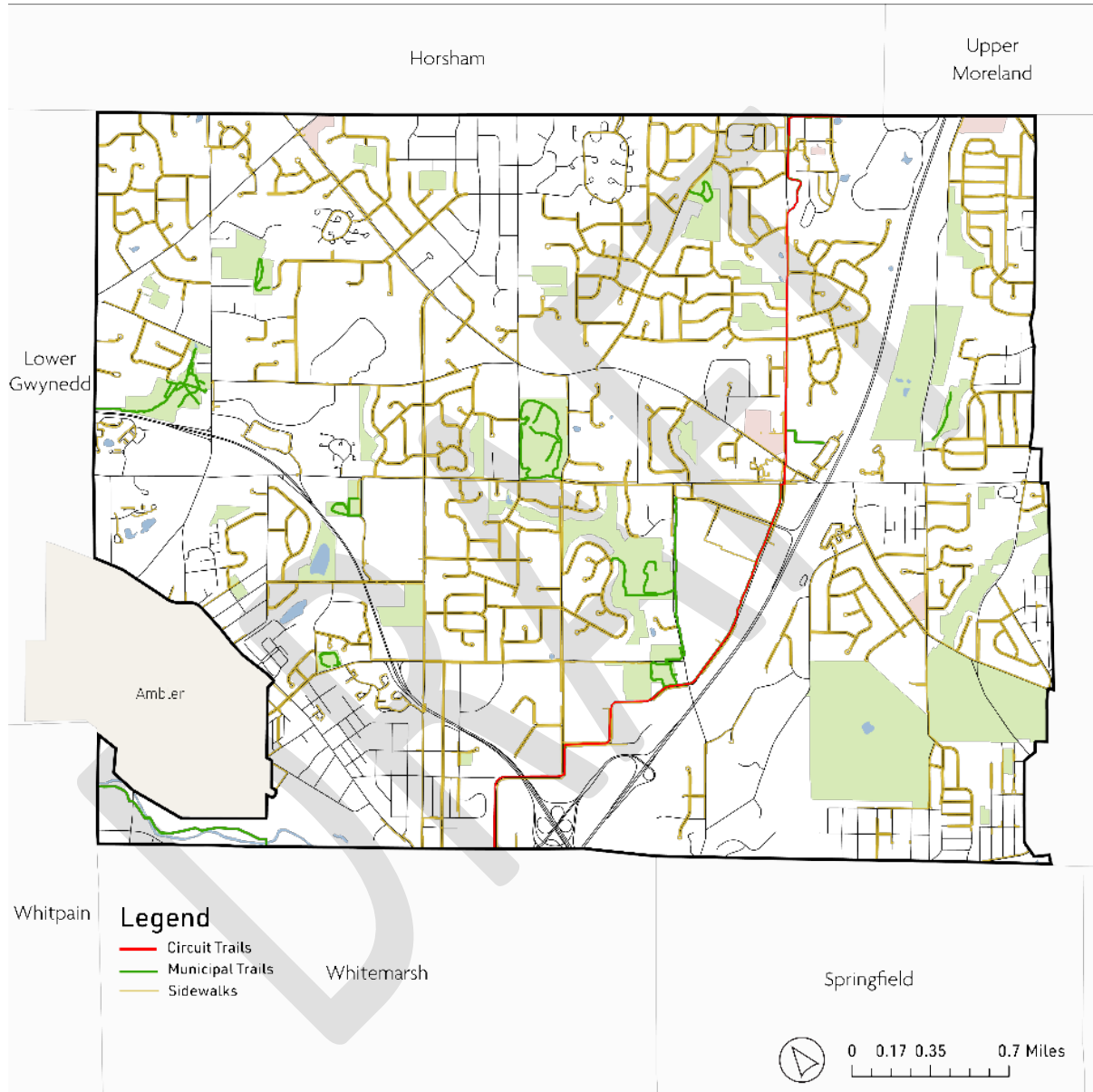
In addition to the several keys above, increasing usage of trails, especially among diverse user groups, will require a strategic approach to community engagement that addresses access limitations, communications challenges, fear of discrimination, and a lack of awareness. Agencies need to build genuine partnerships with diverse groups within the community to understand the specific barriers limiting trail uses, and develop collaborative solutions.

There are a number of potential partners that can aid in increasing trail accessibility including the MCPC, Montgomery County Parks, Trails, and Historic Sites, UDT Parks and Recreation Departments, and the Circuit Trails Coalition.



Figure 89: Bicycle and Pedestrian Routes

Source: DVRPC and Montgomery County (2024)





Electric Vehicles

Electric vehicles are becoming a preferred choice for consumers looking to lower their carbon footprint and as their popularity increases, Townships can benefit from having the necessary infrastructure. Over 300 public charging connections in Montgomery County currently exist and there are two in Upper Dublin. However, two of the top five municipalities for electric vehicle infrastructure are adjacent to Upper Dublin; Horsham and Whitpain which have 35 and 18 public electric vehicle charges respectively.

DVRCP's *Planning for Electric Vehicles in Montgomery County*, the suggested place for EVSEs, or charging stations, is at multi-unit dwellings, because their parking situations may create an obstacle to residents charging an EV at home that a public EVSE could address. However, because there are some chargers in UDT access to a number of them in nearby areas, and a very low % of EV users in UDT, this is not the biggest transportation priority to put more chargers in UDT at this time. Despite not needing more charging stations at this time, the plan recommends the following for municipalities looking to reduce their carbon emissions:

- Transition public fleets to EVs
- Incorporate charging into their existing planning activities
- Charge an appropriate fee for using EVSE
- Seek additional funding opportunities to deploy EVSE at recommended sites



Community Facilities and Services

Emergency Services

Upper Dublin is served by a number of emergency services. This includes the Fort Washington Fire Company, which has a main station and sub-station. The fire company is a 100% volunteer organization that accepts both junior members (ages 16-17) and adult members. In the last decade, the FWFC responded to an average of 684 calls per year, with a low of 592 in 2016 and a high of 828 in 2021. In addition to fire response, the Township has a separate EMS station on Butler Pike run by the Community Ambulance Association of Ambler which serves Upper Dublin, Ambler, and Lower Gwynedd Twp. There is also Second Alarmer's Association and Rescue Squad which provides primary service to a quarter of the Township. Second Alarmer's primary coverage area is the eastern part of the Township. Their main station is located in Willow Grove, however, they operate a substation during the daytime hours out of Edge Hill Fire Company's station in Abington Township.

While there are no full-scale hospitals within Upper Dublin, there are a number of smaller clinics within the Township and the nearby Jefferson Abington Hospital to the east along Susquehanna Rd. Some of the smaller clinics include senior living facilities like the Fort Washington Estates, Brandywine Senior Living, and Caring Hospice Services.

The Upper Dublin Police Station was temporarily moved to the location of the new Township library on Virginia Drive following the tornado that destroyed the Township building in September 2021. At the time of the last Countywide Hazard Mitigation Plan, there are 40 full-time police officers. Once the construction of the new Township building at the previous location is complete, the police station will return to its previous location. The Police Department has 41 sworn personnel as of 2024.

In the face of serious hazards, there are several critical facilities within Upper Dublin for residents to seek assistance outlined in the Montgomery County Hazard Mitigation Plan. Critical facilities are public and private facilities that are essential for the health and safety of a community during and after a hazardous event. They are designed to be operational during emergencies. The facilities in Upper Dublin are the following:

- Willowbrook at Fort Washington Estates
- UDT Building
- Temple University – Ambler & Fort Washington campuses
- Zipporah S Abramson Center for Early Childhood Education
- 4 Public Elementary Schools
- Sandy Run Middle School
- Upper Dublin High School



- 2 private elementary schools

Schools

Upper Dublin is known for its impressive school district. The school district operates four elementary schools, one middle school, and one high school, and serves students k-12. The professional staff has an average of 16 years of teaching experience and approximately 85% hold advanced degrees. Class sizes of in major subject areas across the district are between 222 and 32 students. Facilities available to the district include a planetarium, technology labs, modern computerized libraries, and Robbins Park, a 38-acre nature preserve for environmental studies.

Enrollment numbers for the 2020-21 school year show a total of 8,181 students in Upper Dublin’s private schools. Currently, the largest cohort of students is at Maple Glen Elementary School which has a total of 4,360 students. Non-public/private school attendance had a total of 375 students.

Due to the Township being nearly 99% built out, the school district does not need to plan and prepare for enrollment numbers to increase due to accelerated housing construction. However, birth trends may have an impact on numbers. Births have been averaging 222 per year for the last six years that are coincident with the last 6 years of enrollment history that is the basis for the projection. The 6-year trend is for 6+ additional births each year, and if continued for 5 years could add as many as 40 additional students to the Kindergarten class in school year 2025-2026.

In 2019, the Upper Dublin School District adopted its Strategic Framework to Promote Empowerment through Educational Excellence. This strategic plan outlines focus areas and goals for the improvement of the school districts.

Elementary Schools

Fort Washington Elementary School
1010 Ft. Washington Ave.
Fort Washington, PA 19034
Kindergarten to Grade 5
Students: 455 *

Jarrettown Elementary School
1520 Limekiln Pk
Dresher, PA 19025
Kindergarten to Grade 5
Students: 423

Fitzwater Elementary School
30 School Ln
Willow Grove, PA 19090
Kindergarten to Grade 5
Students: 380

Maple Glen Elementary School
1581 Fort Washington Ave
Ambler, PA 19002
Kindergarten to Grade 5
Students: 4360

Middle School

Sandy Run Middle School
520 Twining Rd
Dresher, PA 19025
Grade 6 to Grade 8
Students: 1,228

High School

Upper Dublin High School
800 Loch Aish Ave
Fort Washington, PA 19034
Grade 9 to Grade 12
Students: 1,335

* - Enrollments are as of Oct 15, 2020



Figure 90: Focus Areas and Goals of the UDSD Strategic Action Plan

Teaching and Learning

GOAL #1 - The District shall ensure that all students (100%) will read at/above grade level and by the end of third grade. Further, students will remain on/above grade level moving forward.

GOAL #2 - The District shall ensure that all students (100%) will demonstrate at least proficiency in mathematics by the end of seventh grade. Further, students will remain on/above grade level moving forward.

GOAL #3 - The District shall ensure that all students (100%) will demonstrate at least proficiency in writing across all domains by the end of eighth grade.

GOAL #4 - All District Administrators/Staff who play a direct role in supervising/coaching teachers will participate in intensive and ongoing PD around instructional leadership, classroom observation, and feedback for growth.

Technology & Innovation

GOAL #1 - The District shall ensure the purposeful integration of technology into the curricula to support the International Society for Technology in Education (ISTE) standards for students, teachers, and administrators. The ISTE standards call for empowered learners, digital citizens, global communicators, innovative designers, knowledge constructors, computational thinkers, and creative collaborators.

GOAL #2 - The District shall accelerate the adoption of transformative teaching and learning practices, including formative assessment, differentiation, feedback as work unfolds, and students as co-designers of their learning.

GOAL #3 - The District shall create and support conditions for innovation in all schools and classrooms with a focus on equity.

Stakeholder Engagement

GOAL #1 - The District shall build and sustain a culture of informed decision-making and accountability with a focus on transparency and trust.

GOAL #2 - The District shall strengthen connections with stakeholders by emphasizing belonging, trust, and transparency.

GOAL #3 - The District shall create an ecosystem of connections to promote communication equity.

GOAL #4 - The District shall promote an active engagement model which utilizes experiences and talents of all stakeholders.

Human Resources and Labor Relations

GOAL #1 - The District shall build capacity to recruit and retain the most highly qualified staff possible while increasing diversity (administration, professional, and support staff) which reflects excitement and engagement to be an employee of the District.

GOAL #2 - The District shall articulate a series of clearly defined processes to support all staff members by providing the necessary training and development for all employees.

GOAL #3 - The District shall provide supportive resources to staff members in need of improved job performance.



GOAL #4 - The District shall improve communication with employees and the public regarding improvements, achievements, and positive news about District staff to increase staff engagement and improve the community perception.

GOAL #5 - The District shall ensure a compliance mechanism to ensure mandated training and standard operating procedures are provided for all employees.

GOAL #6 - The District shall create a career ladder for highly effective employees.

Budget and Finance

GOAL #1 - The District shall ensure processes are in place to route District funds to programs and services that meet the needs of all students..

GOAL #2 - The District shall provide transparency for all stakeholders regarding budget development and implementation.

GOAL #3 - Ensure compliance with all PDE reporting mandates.

Facilities and Operations

GOAL #1 - The District shall complete a Facilities Needs Assessment for Capital Planning and ensure all school facilities are accessible to all students and stakeholders.

GOAL #2 - Ensure that all school facilities support current pedagogy.

GOAL #3 - Provide adequate safety and security plans for both emergency and non-emergency situations.

Training Centers

Upper Dublin has one training center; the George Hagggar Fire Training Center. Formerly dedicated in 1972. The fire training center was built entirely by members of the fire company, led by Chief George Hagggar. The facility has trained many members of the fire company over the years, along with countless members from numerous neighboring departments. The fore training center allows the Fort Washington Fire Company to continue as one of the most proficient, well-trained fire companies in the area. Key features of the facility include a 2 story burn building, drafting pit, propane gas area, drill tower, and confined space simulation.

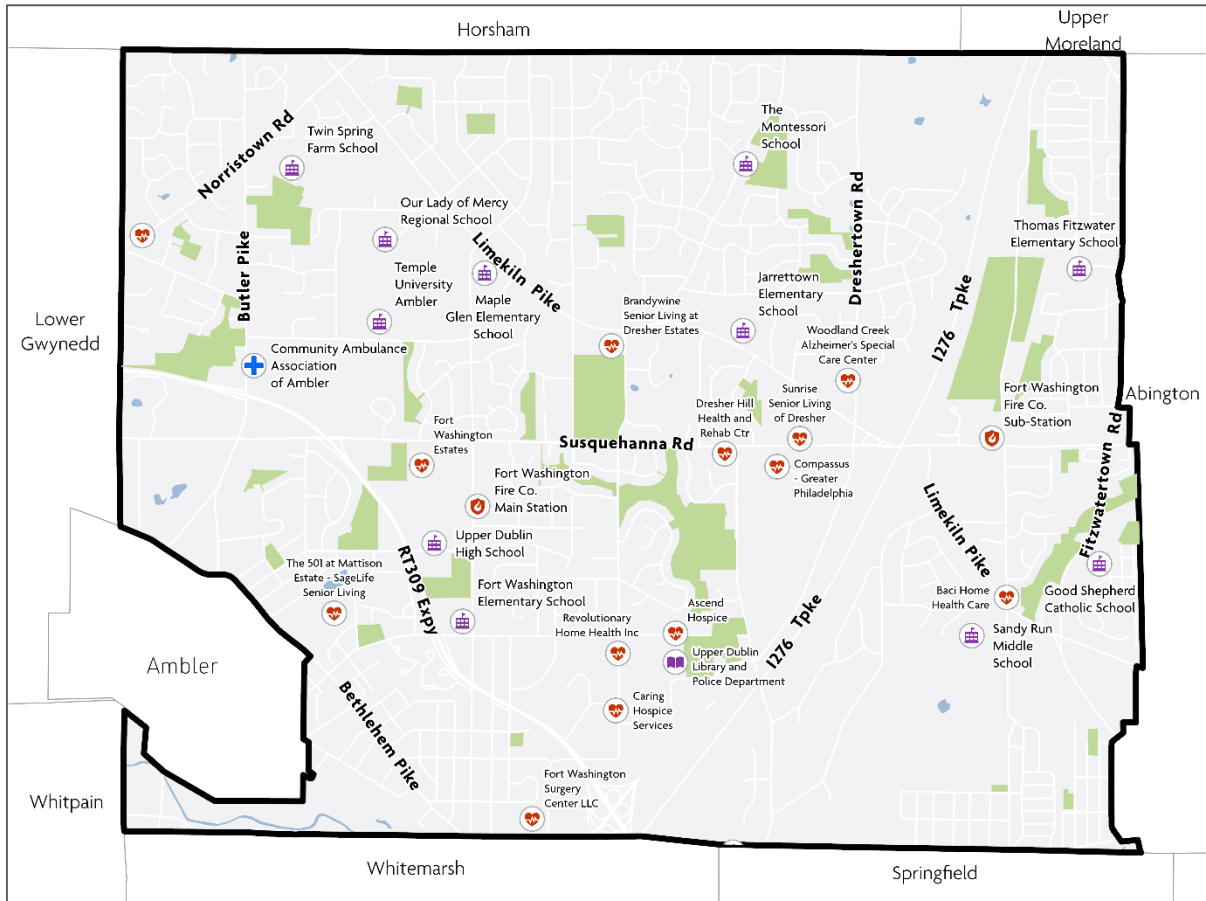
Library

The Upper Dublin Library was moved to the newly constructed state-of-the-art building in 2020 and was designed with the intent to be the epicenter for community engagement within the Township. It was previously named the 2022 Library of the Year by the Pennsylvania Library Association.



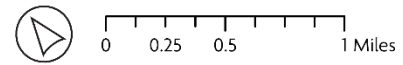
Figure 91: Map of Community Facilities

Source: MCPC (2024)



Legend

- Libraries
- Health Care Facilities
- Schools
- Fire Stations
- EMS Stations





Water and Wastewater

Public water in Upper Dublin is supplied by three providers: Aqua Pennsylvania, Ambler Borough Water Company, and North Wales Water Authority (NWWA). In light of higher-than-average pollution levels in the Township's groundwater due to contamination originating from the Willow Grove Naval Air Base, all three utilities have provided statements and continue to do so on their monitoring and testing of public water to ensure compliance with all state and federal drinking water regulations and advisories. Water service providers are aided in this testing by Temple Ambler.

Sanitary sewer in the Township is provided throughout a large part of the Township by the Bucks County Water and Sewer Authority (BCWSA). BCWSA has joined the Partnership for Safe Water, a new national initiative to help achieve operational excellence in water treatment. This partnership seeks to provide better projections for consumers from microbial contaminants that can cause intestinal illness. Sewage collected by BCWSA within Upper Dublin is treated by various publicly owned treatment works including:

- **Ambler Wastewater Treatment Plant.** The Ambler WWTP is located off Church Street in Ambler Borough and presently serves portions of Upper Dublin Township, Lower Gwynedd Township, Whitpain Township, Whitemarsh Township, as well as Ambler Borough.
- **Abington Wastewater Treatment Plant.** The Abington WWTP is located on Fitzwatertown Road in Upper Dublin Township and presently serves portions of Abington Township, Upper Dublin Township, Springfield Township, Cheltenham Township and the Upper Moreland-Hatboro area.
- **City of Philadelphia Southwest Sewage Treatment Plant.** The City of Philadelphia Southwest Sewage Treatment Plant (Philadelphia SW STP) is located in Philadelphia at 8200 Enterprise Avenue. The facility has a service area of several outlying Townships in addition to the flow from within the City. Wastewater from Upper Dublin Township is transmitted to Springfield Township, which in turn transmits the sewage to the Philadelphia SW STP for treatment.
- **Horsham Water and Sewer Authority Park Creek Sewage Treatment Plant.** The Park Creek STP is located on Keith Valley Road approximately 1000 feet from the intersection of County Line Road. The plant primarily serves the central and northwestern portions of Horsham Township. The northern most corner of Upper Dublin Township lies within the Park Creek Drainage Area. A small portion of Upper Dublin Township containing commercial properties within the Maple Glen triangle (area between Welsh Road, Norristown Road, and Limekiln Pike), is served by a public sewer extension for the Park Creek STP. All remaining wastewater generated within the area of Upper Dublin that is tributary to Park Creek is pumped to the Ambler WWTP for treatment.
- **Upper Dublin Wastewater Treatment Plant.** The Upper Dublin WWTP is located on Delaware Avenue adjacent to the Pennsylvania Turnpike and serves the Rapp Run/Pine Run Drainage Basins. The tributary collection system provides service to the central portion of the Township, including the Fort Washington Office Park, Dreshertown Plaza and residential customers. This treatment plant

is planning to close in the near future. There is a current project happening in collaboration with Bucks County Sewer/Water Authority to divert the existing system to new system.

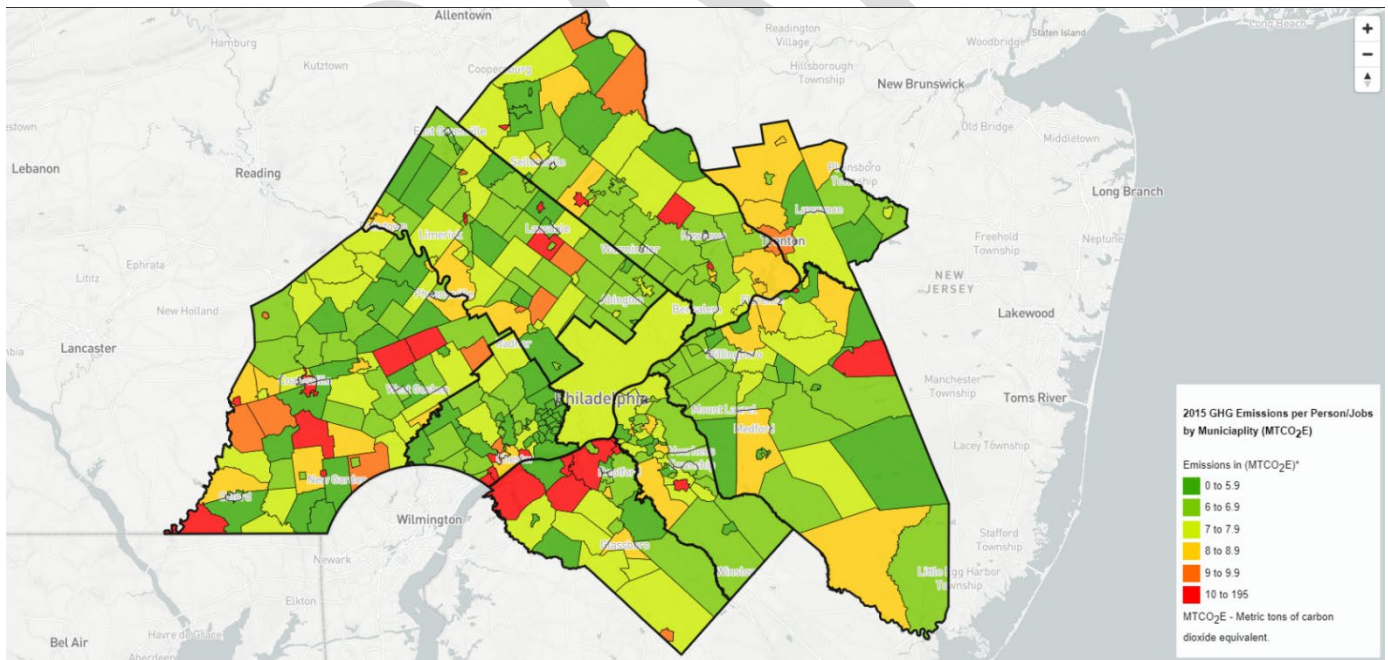
- **Upper Moreland-Hatboro Joint Sewer Authority Sewage Treatment Plant (UMHJSA STP).** The UMHJSA STP is located off Terwood Road approximately 4,000 feet northeast of the Route 611 intersection. The wastewater treatment plant serves portions of Upper Dublin Township, Horsham Township, Warminster Township and all of Upper Moreland Township and Hatboro Borough. The wastewater collection system in Upper Dublin Township tributary to the UMHJSA STP serves the existing Prudential Office Complex, the shopping center at Twining and Welsh Roads, and approximately 380 residences.

Electricity and Broadband

Electricity for the Township is provided by Exelon, which was previously known as PECO. The total estimated consumption of energy in the Township is 3,620 billion BTUs of energy in stationary and mobile applications in 2015 according to DVRPC. As the population within the Township is predicted to steadily rise, so is the total energy consumption. Compared to other municipalities within the region, the total emissions per person/job associated with energy consumption is relatively low.

Figure 92: DVRPC Region Energy and GHG Emissions Profiles

Source: DVRPC (2018)



Upper Dublin’s Environmental Protection Advisory Board has put together the Renewable Energy Transition Plan which was presented to and adopted by the Board of Commissioners in 2021. In this plan, the estimated



annual cost for energy consumption in 2019 was \$606,428. To reduce both costs and emissions, the plan provides the Township with an achievable framework to organize and direct its energy conservation and renewable energy efforts to achieve the following goals:

- 100% renewable electricity for all Township Municipal Operations by 2025
- 100% renewable energy for all Township municipal transportation and heating by 2040
- 100% renewable electricity adoption by the community by 2035
- 100% renewable energy adoption by the community for transportation and heating by 2050

Television and broadband service providers for Upper Dublin include Comcast and Verizon Fios.

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Natural Resources

Parks and Open Space Inventory

The Township's parks and open spaces are an asset to residents and visitors, as well as the wider ecosystem of flora and fauna. There are currently 45 municipally owned parks and open spaces which include both active and passive parks and recreation spaces, as well as undeveloped and protected natural areas. These parks range in use and size with the largest park being Twining Valley at 102 acres and the smallest being East Oreland. Half of the current parkland inventory is suited for active and passive recreation opportunities. The most recently Upper Dublin Township Open Space Plan, adopted in 2023, serves as the Township's guiding plan for maintaining, enhancing, and connecting these spaces, as well as for prioritizing opportunities for acquisition of additional land for open space preservation. UD Plan references the Open Space Plan and is consistent with the recommendations in that plan.

Topography and Floodplain

Due to Upper Dublin's natural rolling topography, the Township is especially sensitive to accelerated runoff due to low-lying areas that flood regularly. Much of the land that falls within a floodplain is not residential, but rather commercial office space or open space including two golf courses. The most susceptible areas to flooding are within the Greater Fort Washington District and the section of Pennsylvania Avenue near the Route 309 interchanges. Furthermore, the zoning ordinance and subdivision and land development ordinance (SALDO) were updated to include design guidelines that encourage sustainable site planning. To build resiliency to flood-related events, the Township has adopted steep slope and tree protection/replacement ordinances to help preserve especially sensitive areas. In addition, two flood retarding structures were installed upstream from the Greater Fort Washington District.

Watersheds

Upper Dublin falls within three major watersheds. The majority of the Township is within the Wissahickon watershed with small northeastern sections being split between the Pennypack Creek-Delaware River and Upper Neshaminy Creek watersheds.

Within these major watersheds, there are four minor watersheds. These sub-basins in order of total land covered include:

- Lower Wissahickon Creek
- Upper Wissahickon Creek
- Little Neshaminy Creek
- Upper Pennypack Creek

Wetlands

Wetlands are areas of land saturated with water either permanently or seasonally. Wetland habitats serve essential functions in an ecosystem, including acting as water filters, providing flood and erosion control, and furnishing food and homes for fish and wildlife. Upper Dublin contains several wetland areas. These areas are concentrated around the eastern section of the Township with the largest concentrations being found near the Promenade along Interstate 276, the GFW Business District, and near the 309 interchange.

Water

Upper Dublin's proximity to the Willow Grove Naval Air Station and the Warminster Naval Air Development Center has caused the EPA to designate it as a PFAS municipality, or a municipality that has been designated as a PFAS municipality or a municipality with a higher-than-average number of polyfluoroalkyl or PFAS in its drinking water. The Township is one of four in Montgomery County which currently has this status. These chemicals are considered "forever chemicals" as they remain in surrounding ecosystems for thousands of years. PFAS was most commonly used in industrial materials like firefighting foam and has been linked to increased rates of certain types of cancers. This designation is most concerning to households who use well water as the three water providers in Upper Dublin Township are held to state and federal regulations and advisories. In addition to the threat of PFAS, there are a number of significant or high-hazard dams that pose a risk to not just Upper Dublin, but the County.

Figure 93: Environmental Contamination in Montgomery County

Source: US EPA (2021)

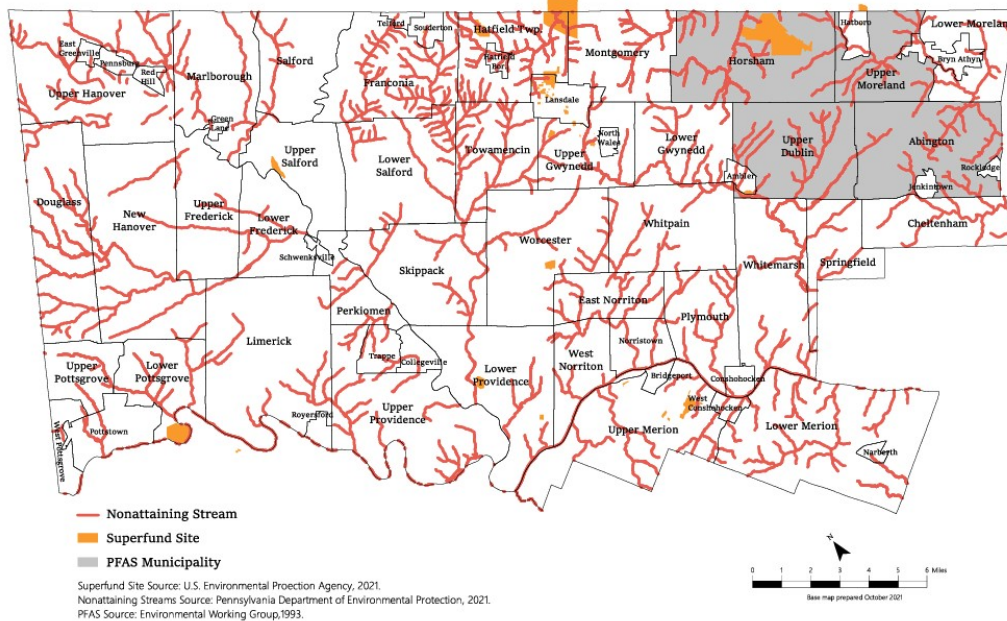




Figure 94: Floodplain in Upper Dublin Township

Source: FEMA (2024)

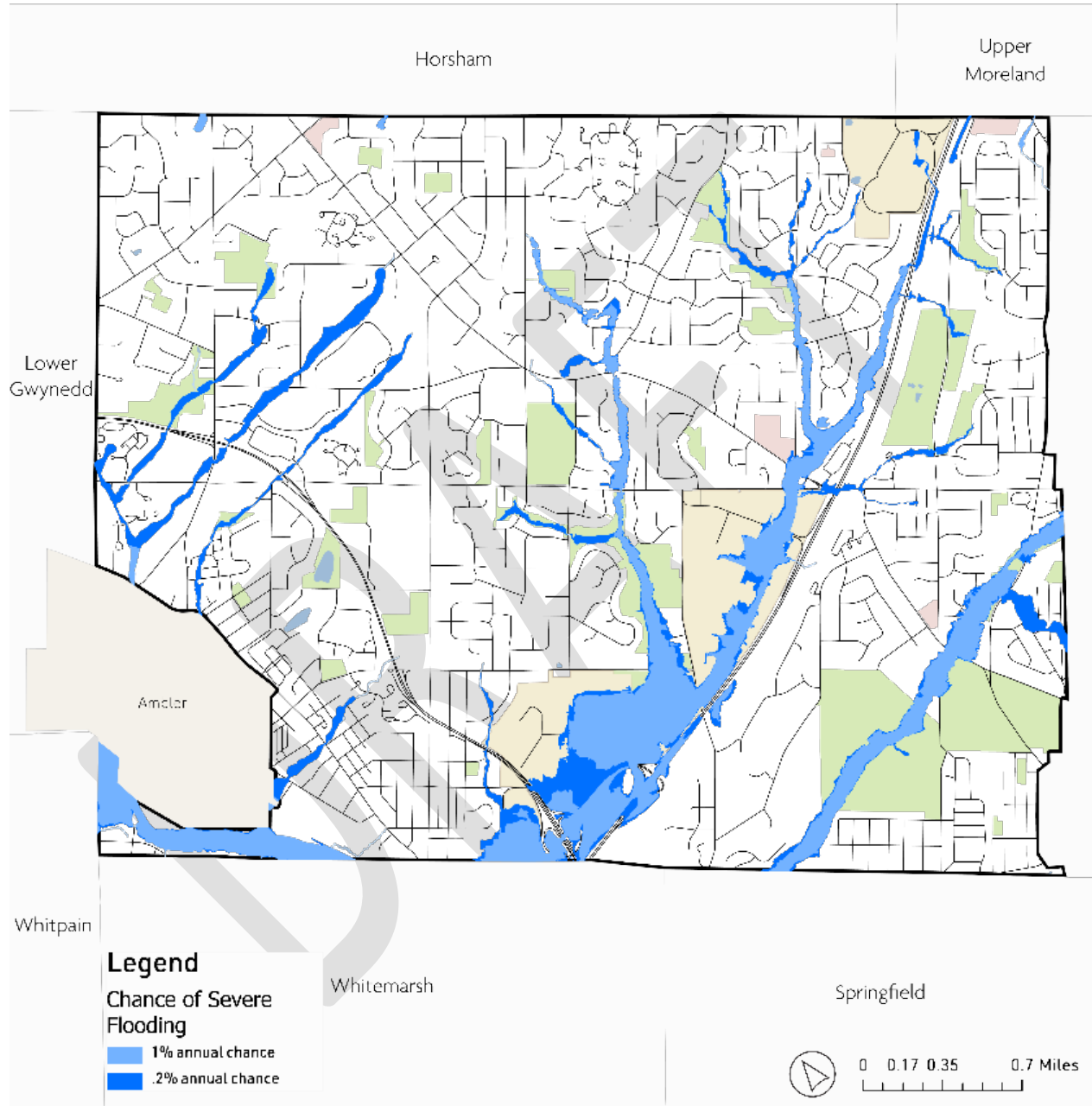
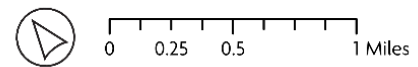
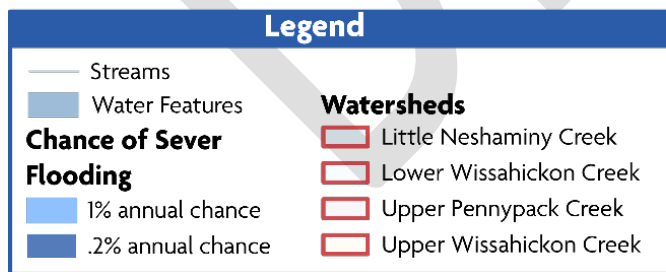
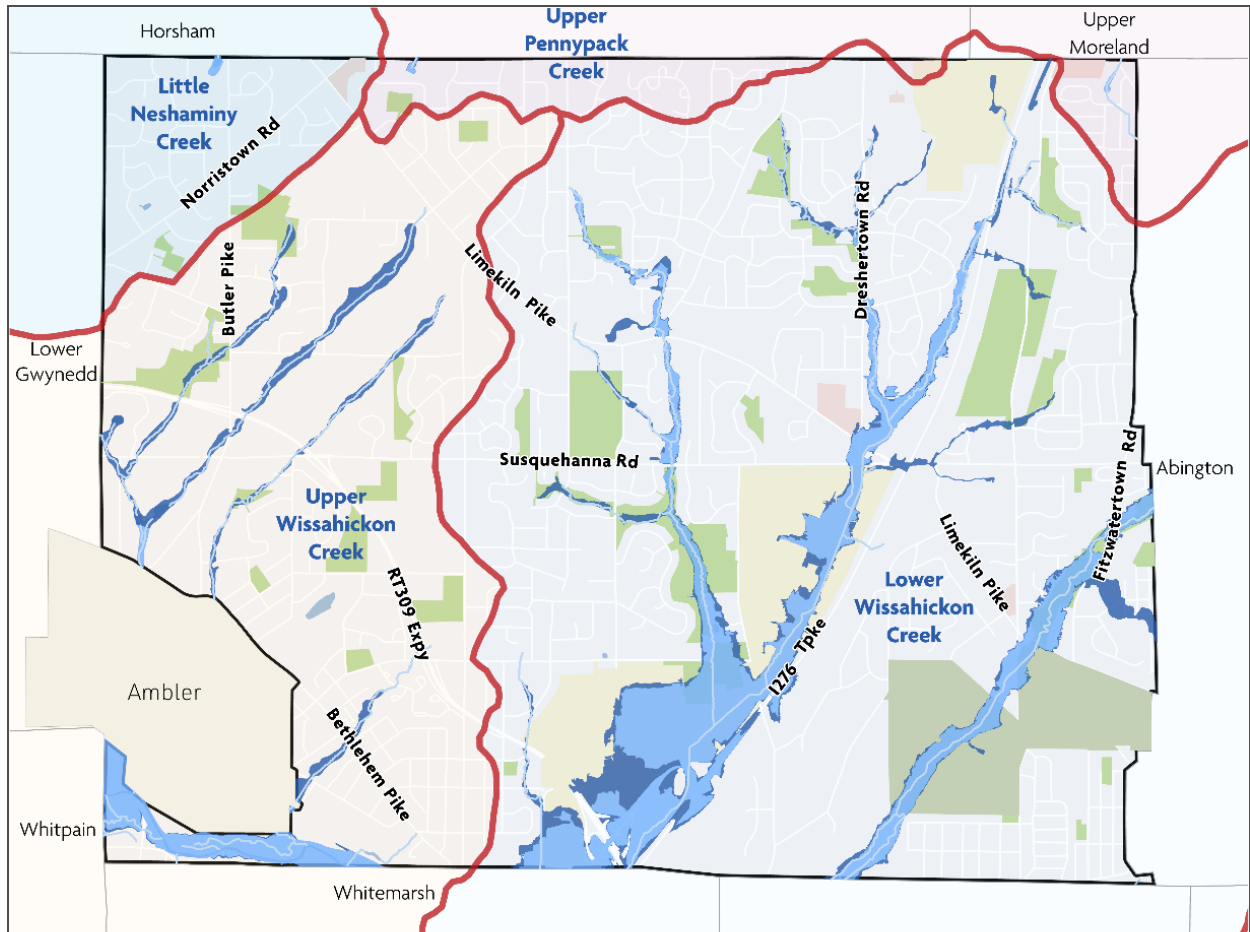




Figure 95: Hydrology in Upper Dublin

Source: PASDA (2024)



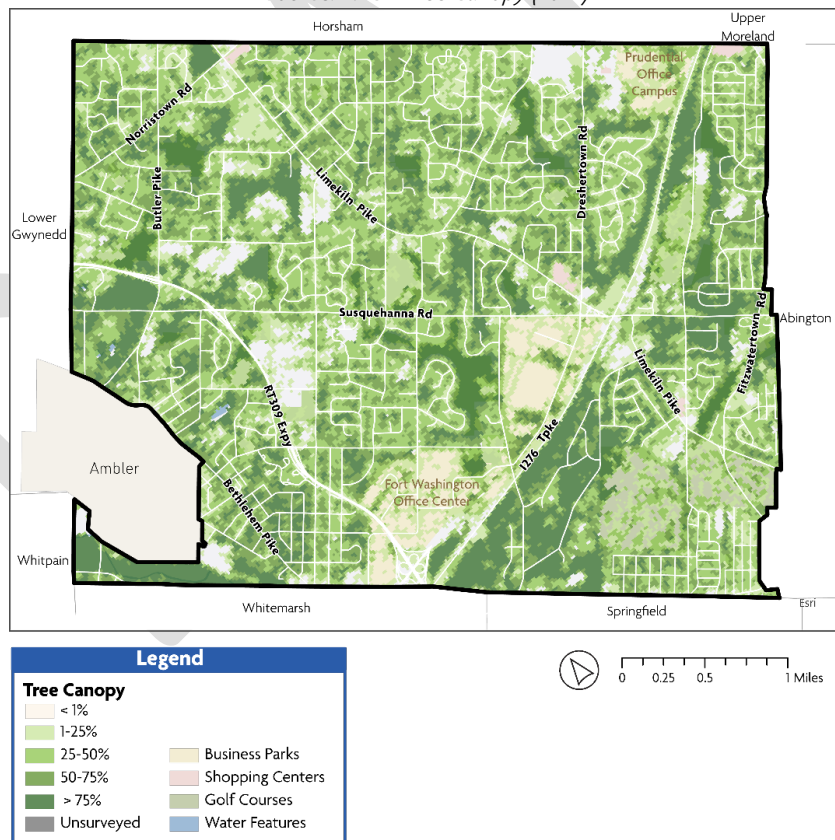
Tree Canopy

Upper Dublin has a solid tree canopy and network as a majority of the Township has at least 50% tree canopy or coverage. Following the tornadic events of September 1st, 2021, hundreds of trees were downed in public lands with a large number being removed at Tannerie Run park. However, since the tornado more than 1,100 trees have been planted in order to restore some of the lost tree canopy. Tree replanting is one of the many efforts Upper Dublin undertakes to care for their tree canopy. Upper Dublin has a Shade Tree Commission which was established in 1999. The commission is responsible for “any tree having more than fifty percent (50%) of its trunk diameter at breast height within the right-of-way of a public street or on Township property.”

Upper Dublin is currently designated as a Tree City by the Arbor Day Foundation which means that Upper Dublin meets the following criteria: a tree board or department, tree-care ordinances, an annual community forestry budget of at least \$2 per capita and an Arbor Day observance and proclamation.

Figure 96: Tree Canopy in Upper Dublin

Source: NLCD Tree Canopy (2024)





Historic Resources

Upper Dublin Township is located within a historic region of the Commonwealth and the country itself. The Township was founded in the late 17th century by a William Penn land grant and incorporated in 1719. It began as a farming community and then transitioned into a hub for limestone mining. Parts of Upper Dublin Township were part of a camp site for the Continental Army during the Revolutionary War, hence the name “Fort Washington.”

There are many historic structures in Upper Dublin that contribute to the Township’s architectural character and uniqueness. In 2006, Upper Dublin Township’s Board of Commissioners adopted a Historic Preservation Ordinance which established the Historic Commission and provides a process for reviewing and discussing alternatives to demolition of a historic resource. In addition to the Historic Commission, there are a handful of historic organizations that are dedicated to preserving history in the area, including the Historical Society of Fort Washington.

There are a series of ordinances that impact historic preservation in the Township including:

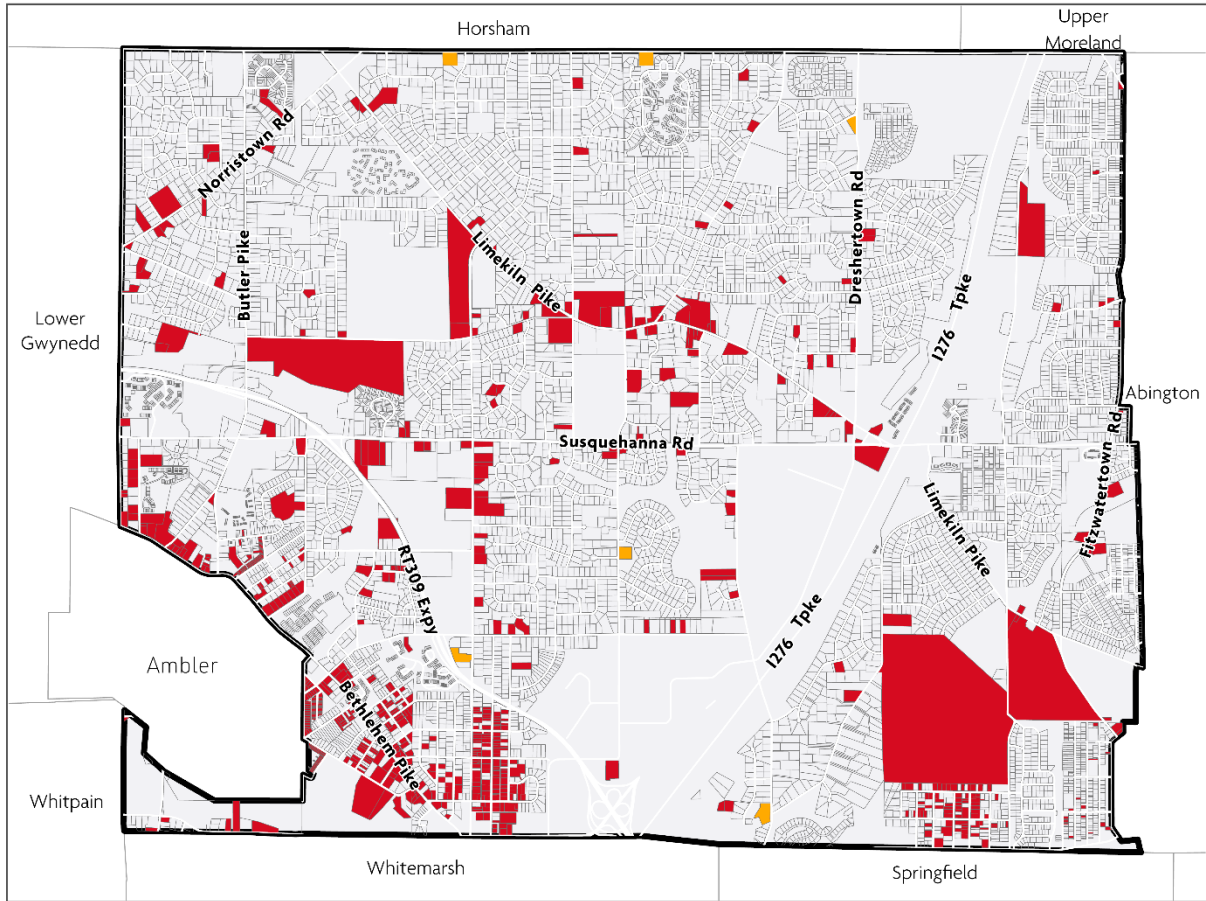
- **Ordinance 1175:** Created a Historic Preservation chapter to the Upper Dublin Township Code of Ordinances, established the Historic Resource Inventory (and associated criteria), established a Historic Commission (and associated duties), provided a process for subdivision and land development plan review of structures on the Historic Resources Inventory, and modified the Building Construction standards for historic buildings.
- **Ordinance 11-1241:** Added criteria for designation on the Historic Resources Inventory, introduced specific definitions for accessory apartment, contributing resources, cultural landscape, historic resources, and historic resource home occupation, and created a Historic Resource Overlay District with specific permitted uses, bulk and area requirements, conditional use approval, and historic resources impact study.
- **Ordinances 09-1212, 1196, 13-1266, 14-1283, and 15-1304:** Adds properties to the Historic Resource Inventory.

The Historic Commission is responsible for evaluating, compiling, maintaining, and publishing the Historic Resource Inventory. There are 802 buildings on the Historic Resources Inventory. Eight of the properties are designated as Class I properties; the remaining are Class II. Class I resources are either listed in the National Register of Historic Places or have received a Determination of Eligibility from the Pennsylvania Historical and Museum Commission (PHMC). Class II resources are deemed historically or architecturally significant at the local level. Of the Class I resources, one is listed on the National Register of Historic Places: the Quaker Manor House.



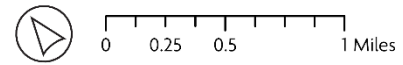
Figure 97: Historic Resources Inventory Map

Source: Upper Dublin Township (2024)



Legend

- Class I Historic Properties
- Class II Historic Properties





Appendix D: Community Engagement Reports

This appendix includes the Focus Groups Summary Report and the Community Engagement Summary Report, which includes findings from the survey and pop-up events during the process.

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Community Engagement Report

April 2024



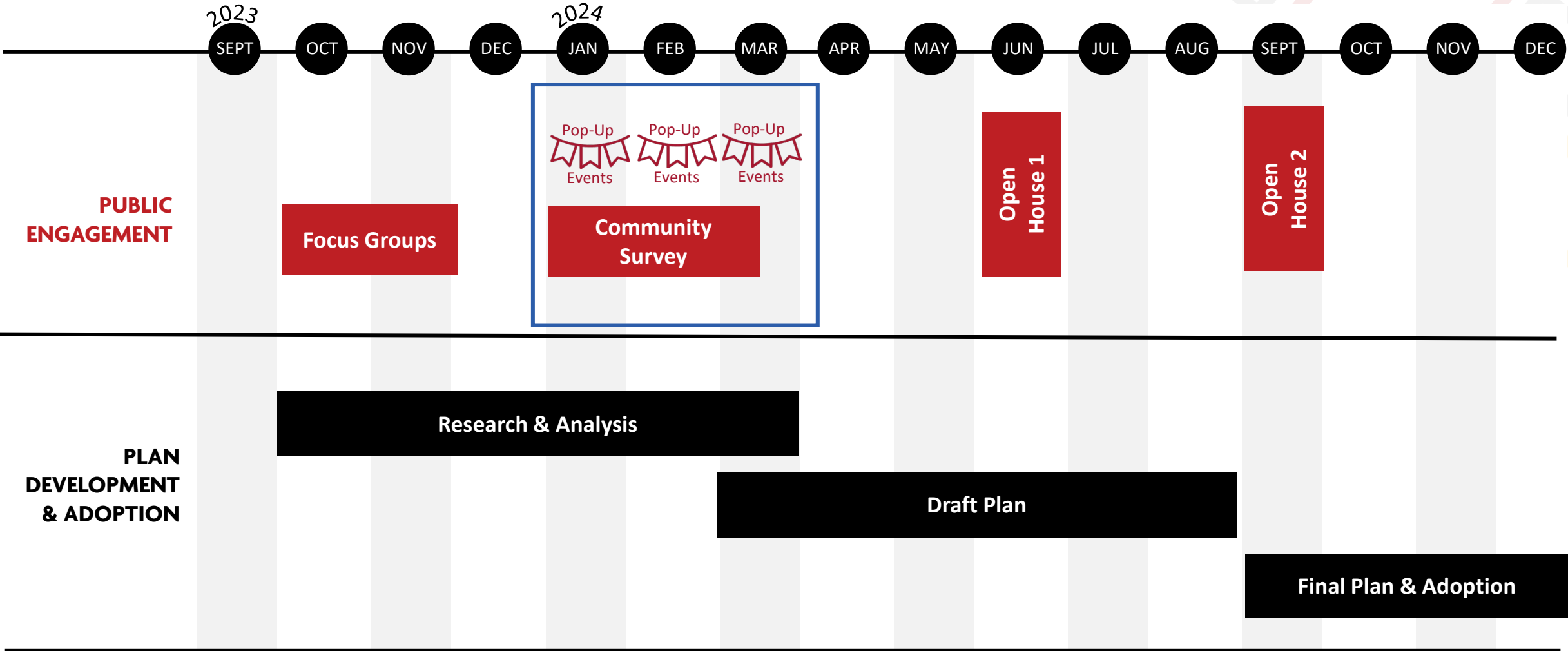
UPPER DUBLIN
— T O W N S H I P —
COMPREHENSIVE PLAN

Overview

FINAL DRAFT PLAN - 11.26.24

Upper Dublin Township is updating their comprehensive plan during a 16-month process. This report provides a summary of community feedback from the community survey and pop-ups that occurred from January to March 2024.

Planning Process



Outreach & Engagement Activities



6 Pop-Up Events



7 Email Blasts



Online survey &
paper copies
distributed at key
locations



UD Website Update
& Social Media
Posts

Community Responses

Total Survey Responses: 1,155

- This reports includes data collected from the survey and pop-ups.
- Over 2,000 comments on the community survey.
- *At the pop-ups:*
 - Over 100 interactions with the visioning workshop poster.
 - Over 150 interactions with the visual housing preferences activity.
 - Over 25 points of interest categorized.

FINAL DRAFT PLAN - 11.26.24



Calling all Community Members!



UPPER DUBLIN
TOWNSHIP
COMPREHENSIVE PLAN

Upper Dublin Township is seeking community feedback for its **Comprehensive Plan update!**

Your feedback will guide the Township's vision and efforts for the **next 10 years**. You can help shape the future of the township by:

Taking the UD Plan Survey TODAY!

The survey closes March 12, 2024.

Participating in visioning activities!

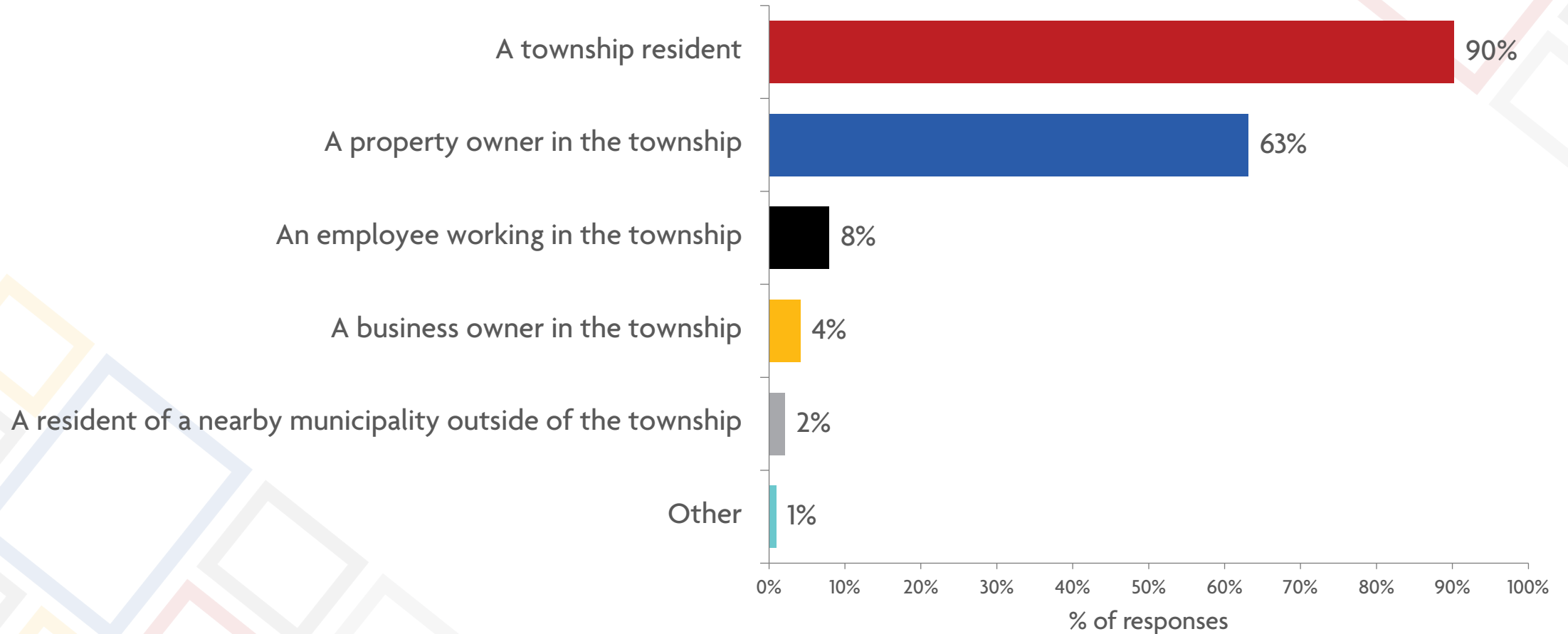
Pop-up events will be held throughout the township in January, February, & March!



Scan the QR code or visit www.surveymonkey.com/r/UDPlanSurvey to take the survey, find a list of pop-up events, & learn more!

Survey Demographics | Relationship to UDT

Select all that apply Answered: 1,150 Skipped: 5

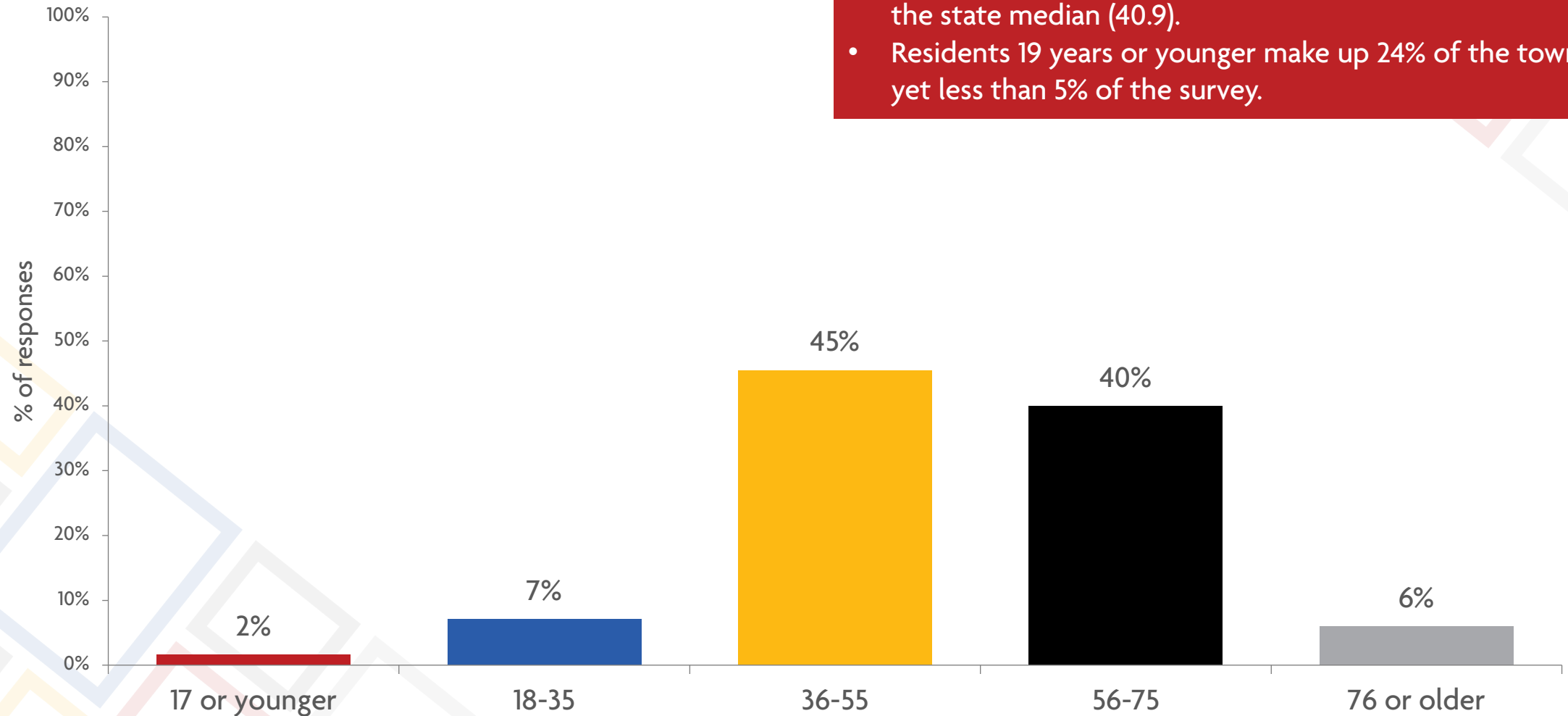


Survey Demographics | Age

Answered: 1,147 Skipped: 8

US Census Comparison*

- The median age in the township is 44.7 which is older than the state median (40.9).
- Residents 19 years or younger make up 24% of the township yet less than 5% of the survey.



* All Census Comparisons are to the Census Tracts that make up Upper Dublin Township.

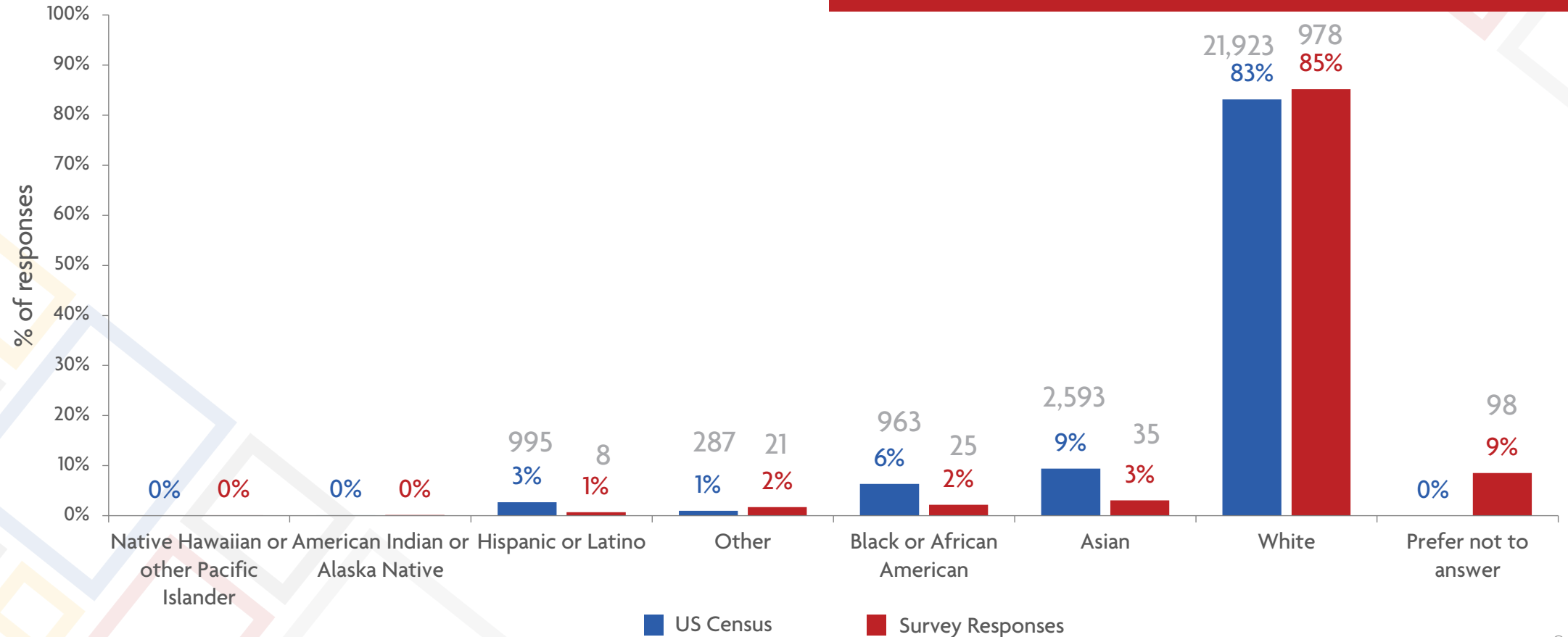
Survey Demographics | Race and Ethnicity

Select all that apply Answered: 1,149 Skipped: 6

Actual population numbers and numbers of responses are provided in grey.

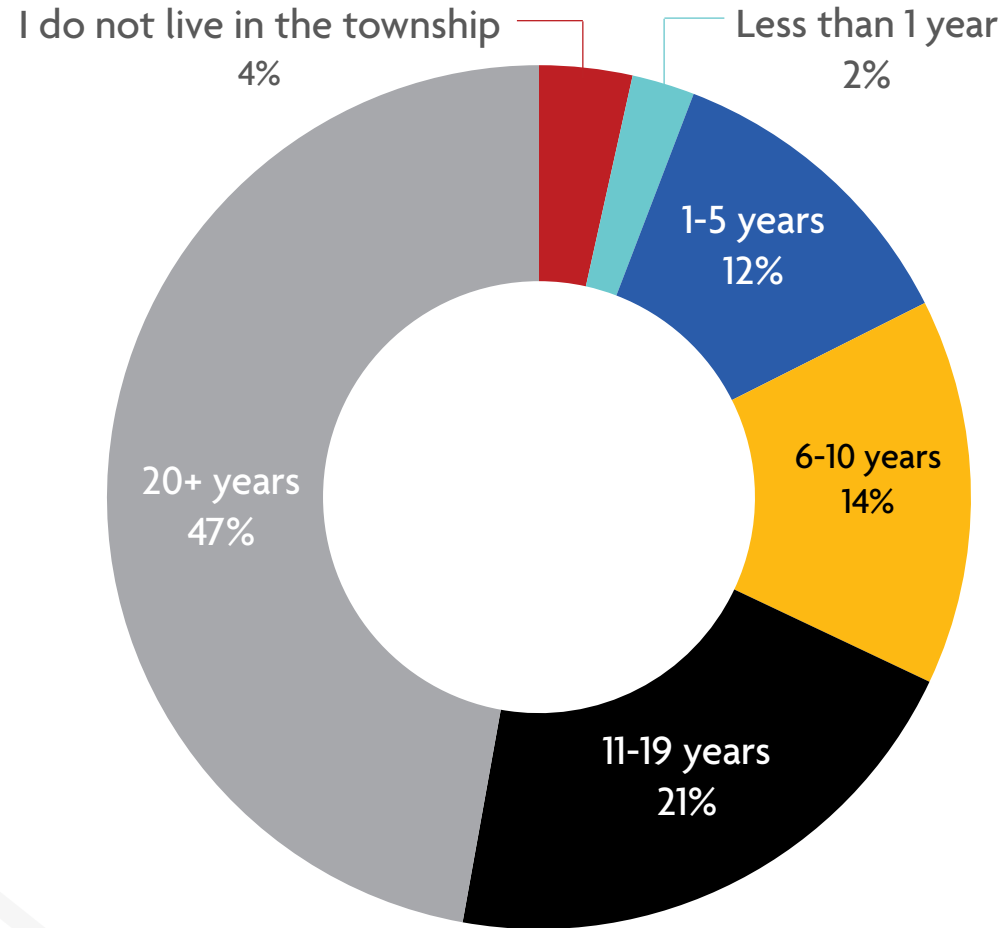
US Census Comparison

The survey response data generally aligns with US Census data; however, there was an underrepresentation of responses from Hispanic or Latino, Black or African American, and Asian community members.



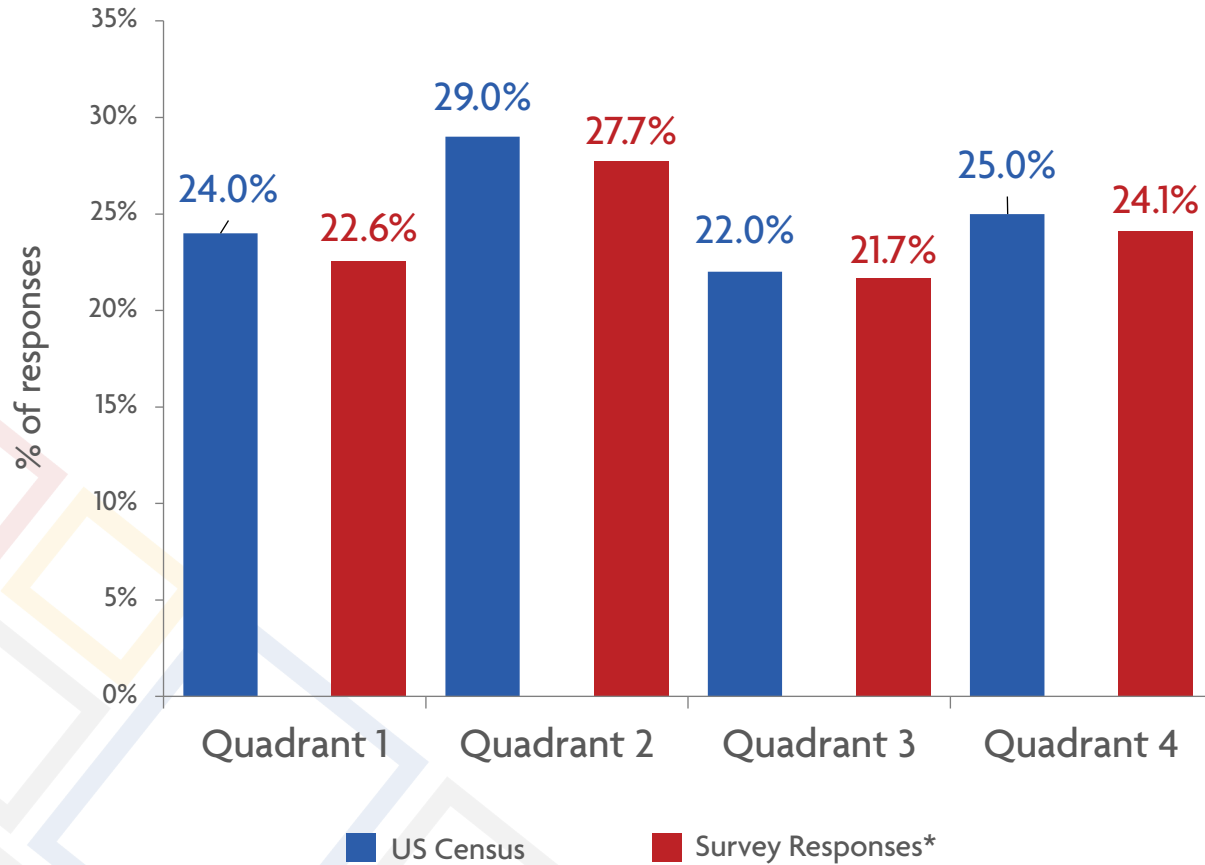
Survey Demographics | Length of Time in Township

Answered: 1,149 Skipped: 6

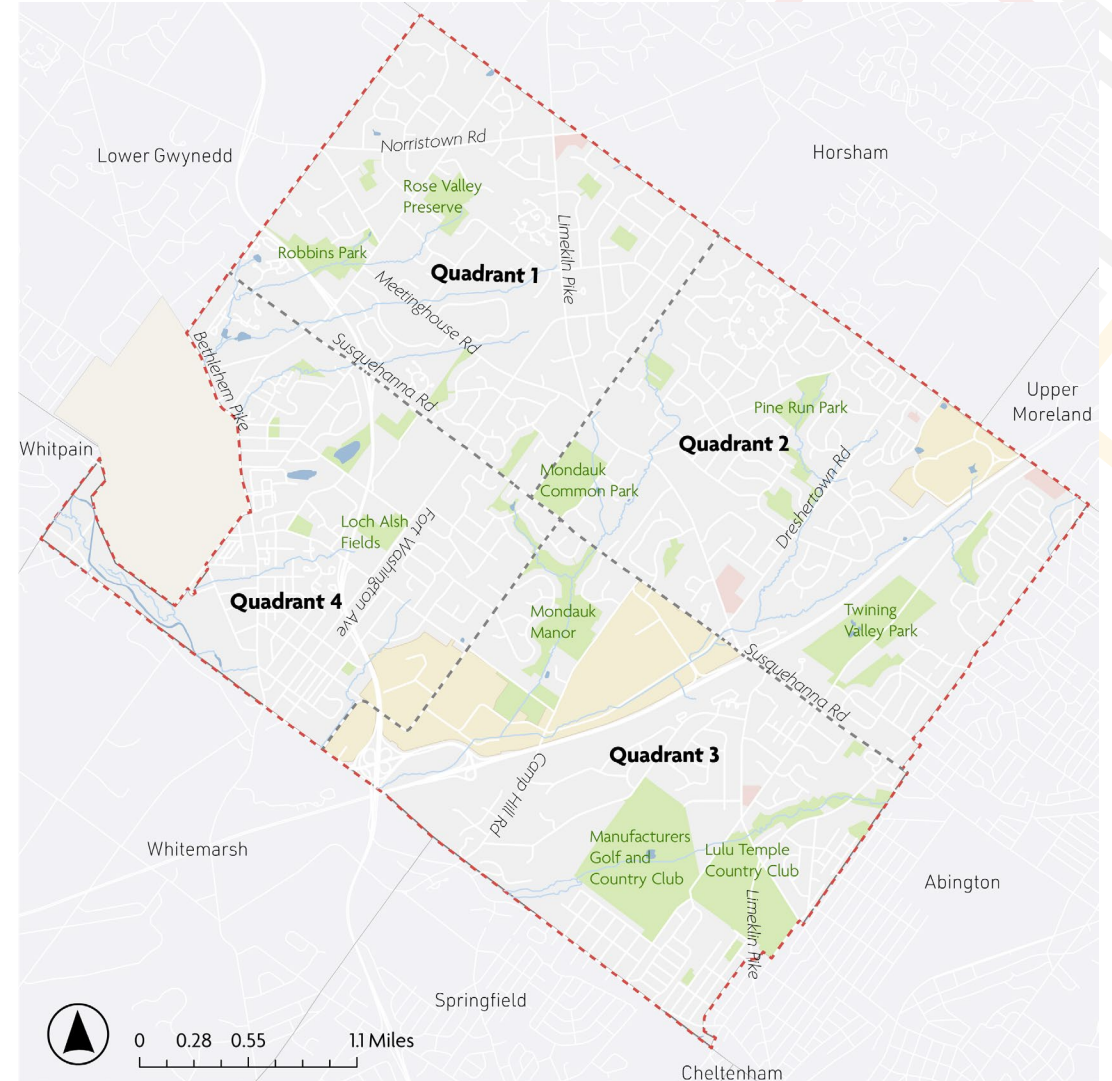


Survey Demographics | Location in UDT

Answered: 1,148 Skipped: 7



*4% of survey respondents indicated that they did not live in the township or did not know which quadrant they lived in.

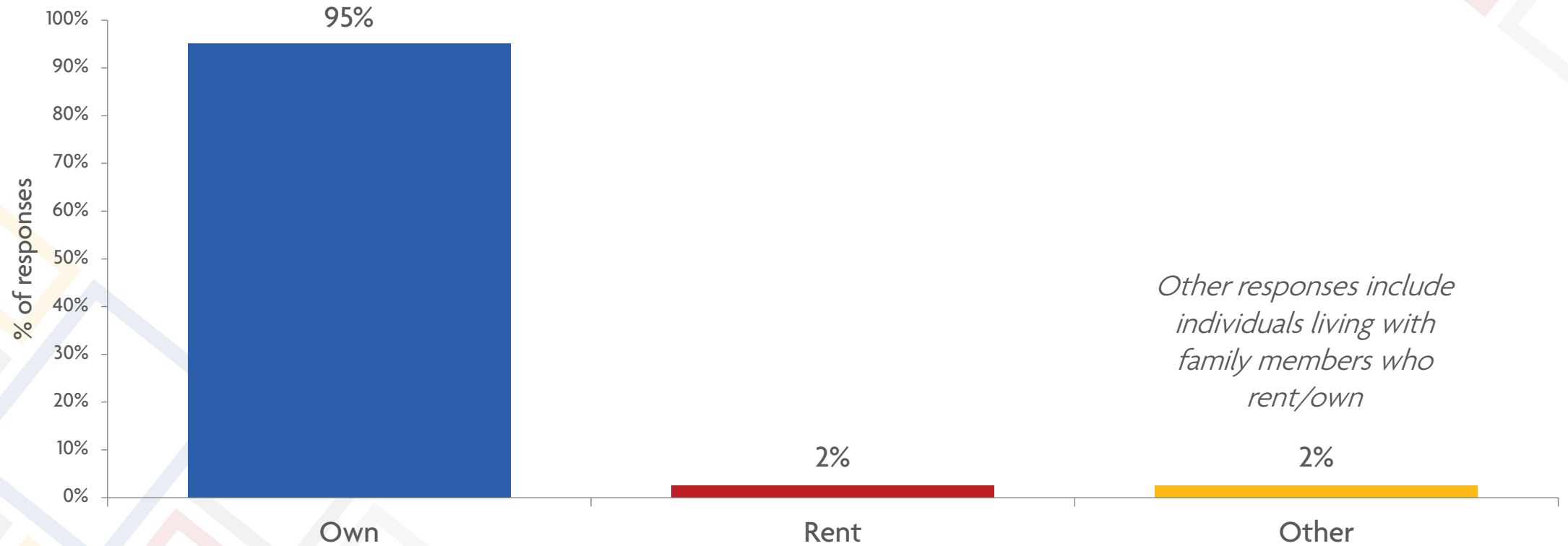


Survey Demographics | Rent vs. Own

Answered: 1,057 Skipped: 98

US Census Comparison

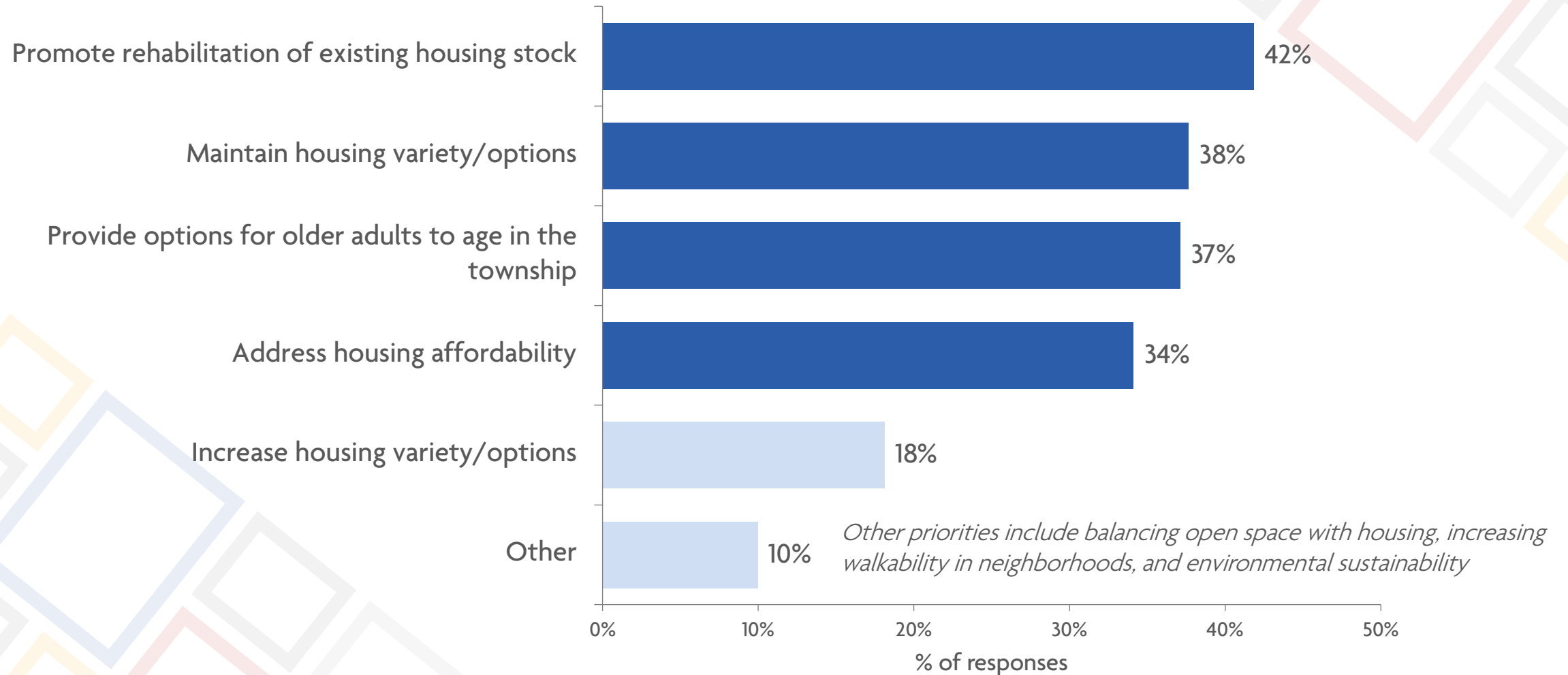
15% of housing units in Upper Dublin Township are renter-occupied. There was an underrepresentation of responses from renters to the survey.



Priorities & Key Takeaways

Housing | Priorities

Select all that apply Answered: 994 Skipped: 161



Housing | Additional Comments & Takeaways

- Majority of housing is too expensive and associated taxes make it hard for residents to age in place, downsize, or remain within the Township.
- Need for smaller lots and mixed-use developments.
- Zoning changes to allow for ADUs* throughout the Township are desired.
- Need for streetscape and beautification efforts along key connection points between housing and commercial areas.

*"I'd love to see more **mixed zoning**, that's something I miss from past homes. It's a special thing to be able to walk to the shop and see other community members out and about. Driving everywhere gets isolating."*

*"There is a major gap in **middle-range houses** in the district. There are houses in the \$400,000s and over \$600,000, with very little in between."*

*"We need to have housing developments that are not cookie-cutters. Not all houses in a development should be the same. There should be ones appropriate **for people just getting started**, for those **raising children**, for **empty nesters**, and condos for any of those. There should be more ranchers for those of us with disabilities. And there should be much more **low-income housing**."*

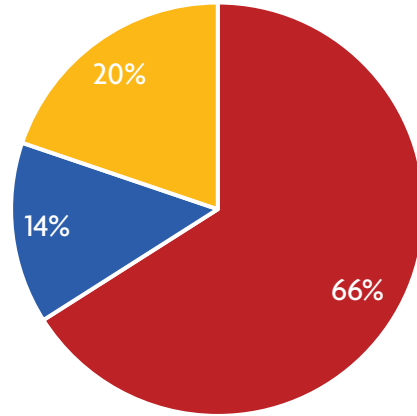
*"Would like to be able to build a **second smaller home on 1/2 acre** lots where larger homes already exist so aging parents can sell their homes to their children or others and build a 1 floor small, less than 1,000 square ft. house."*

*Accessory Dwelling Unit: A secondary residential unit located on the same lot as a stand-alone home.

Housing | Evaluation of Housing Needs

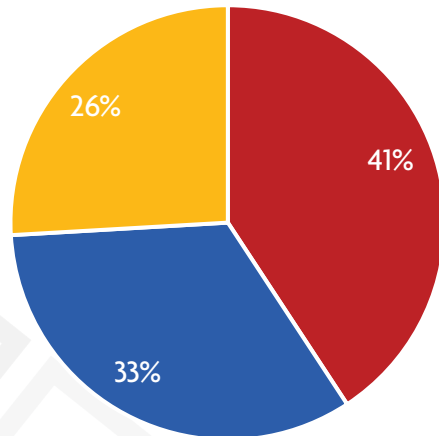
Answered: 1,047 Skipped: 108

The variety of housing types (i.e., apartments, duplexes, single-family, townhouses, senior housing, etc.) in the township is adequate.



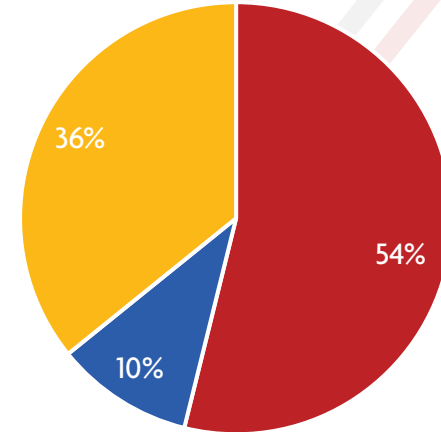
■ Agree ■ Disagree ■ Unsure

The diversity of housing price points is adequate.



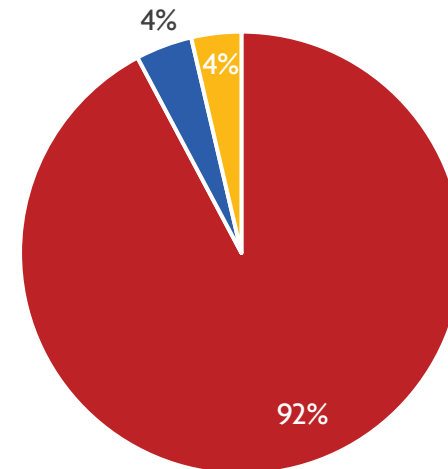
■ Agree ■ Disagree ■ Unsure

The housing needs of others in my community are being met.



■ Agree ■ Disagree ■ Unsure

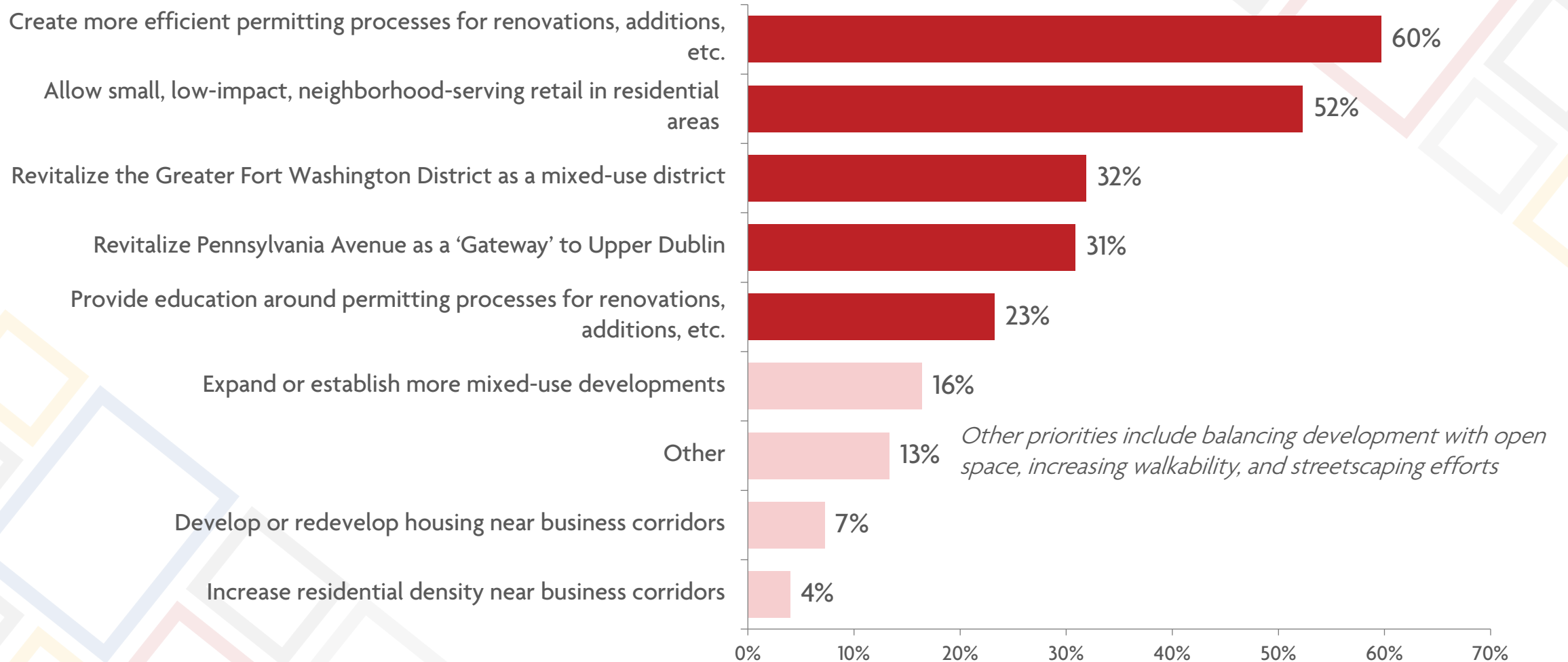
My housing needs are being met.



■ Agree ■ Disagree ■ Unsure

Development | Priorities

Select all that apply Answered: 1,004 Skipped: 151



Priority Rankings | Development

- Permitting process is a challenge for development and redevelopment.
- Concerns about overdevelopment (e.g., developing on green/open space or environmentally sensitive areas, increase density of areas in redevelopment, etc.).
- Desire for safe walking routes to recreational opportunities and commercial areas.

*“A “downtown” does not exist in Upper Dublin. We need a vibrant, **unique main street** that attracts local small businesses.”*

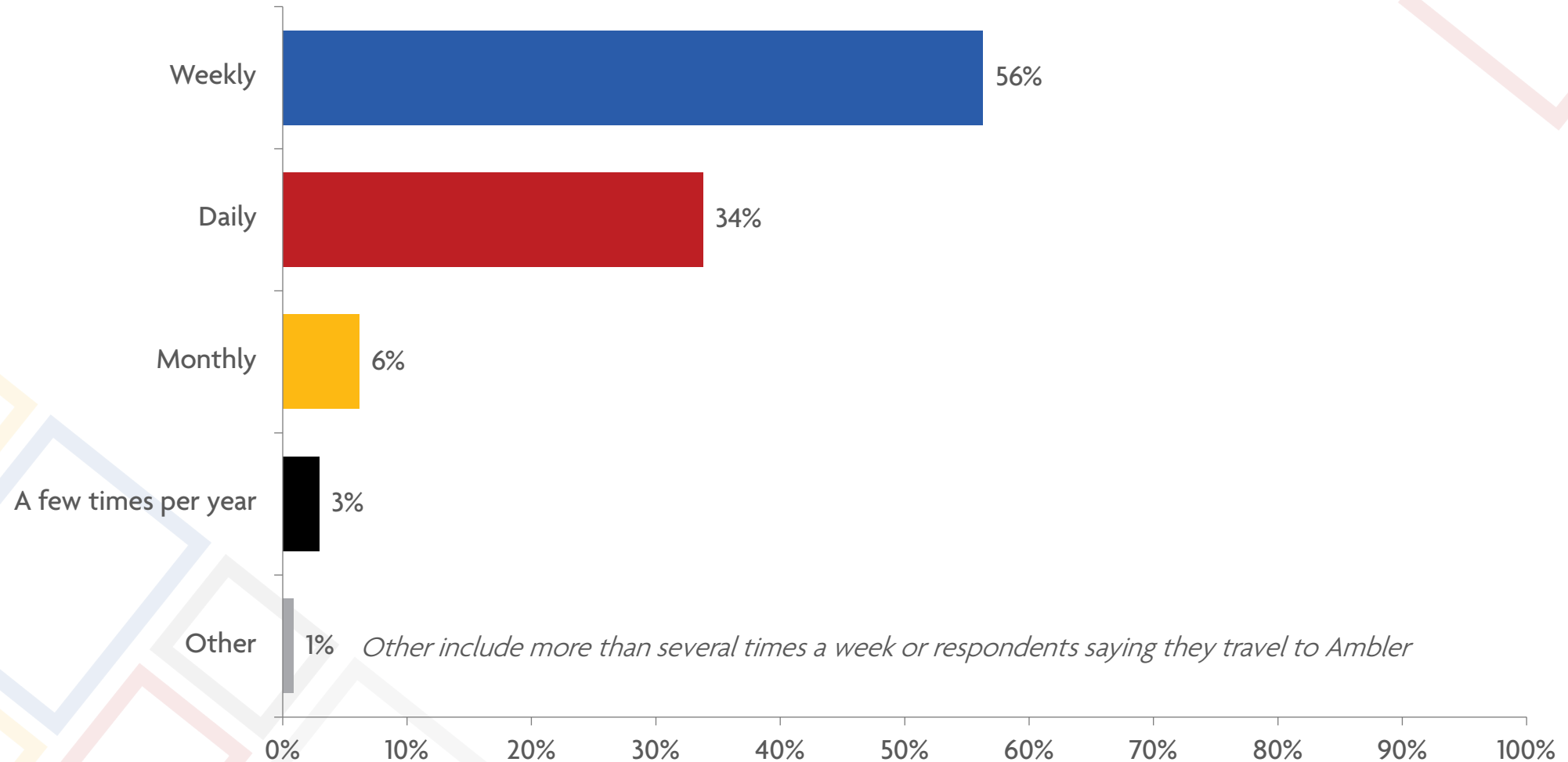
*“I do not want any of the current open space to be developed, however, there is a lot of space in the Ft Washington business park that is already developed, but under-used. It could be **re-used to expand mixed-use developments.**”*

*“Since we can't afford to move to a larger home, it would be great to be able to **add an ADU or addition**. But neighbors who have gone that route tell us that the township makes it so difficult and expensive that it's barely even worth it.”*

*“A priority for my neighborhood is having **sidewalks** on the busy roads that enclose our neighborhood. It limits our ability to walk to shops, cafes, etc., increasing car traffic and causing hazardous conditions for people who do walk along the side of roads like Butler Pike and Norristown Road.”*

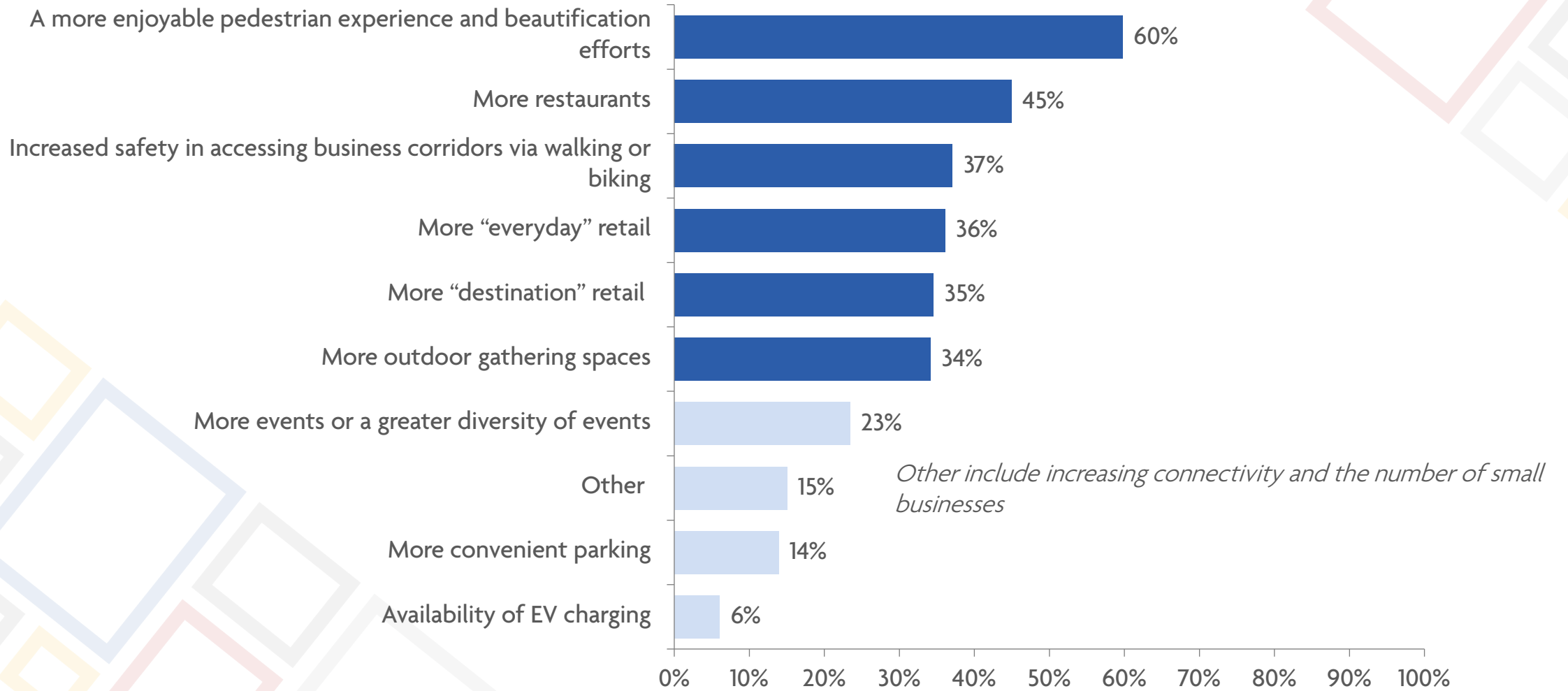
Business & Economic Development | How often do you visit a business located in UDT?

Answered: 1027 Skipped: 128



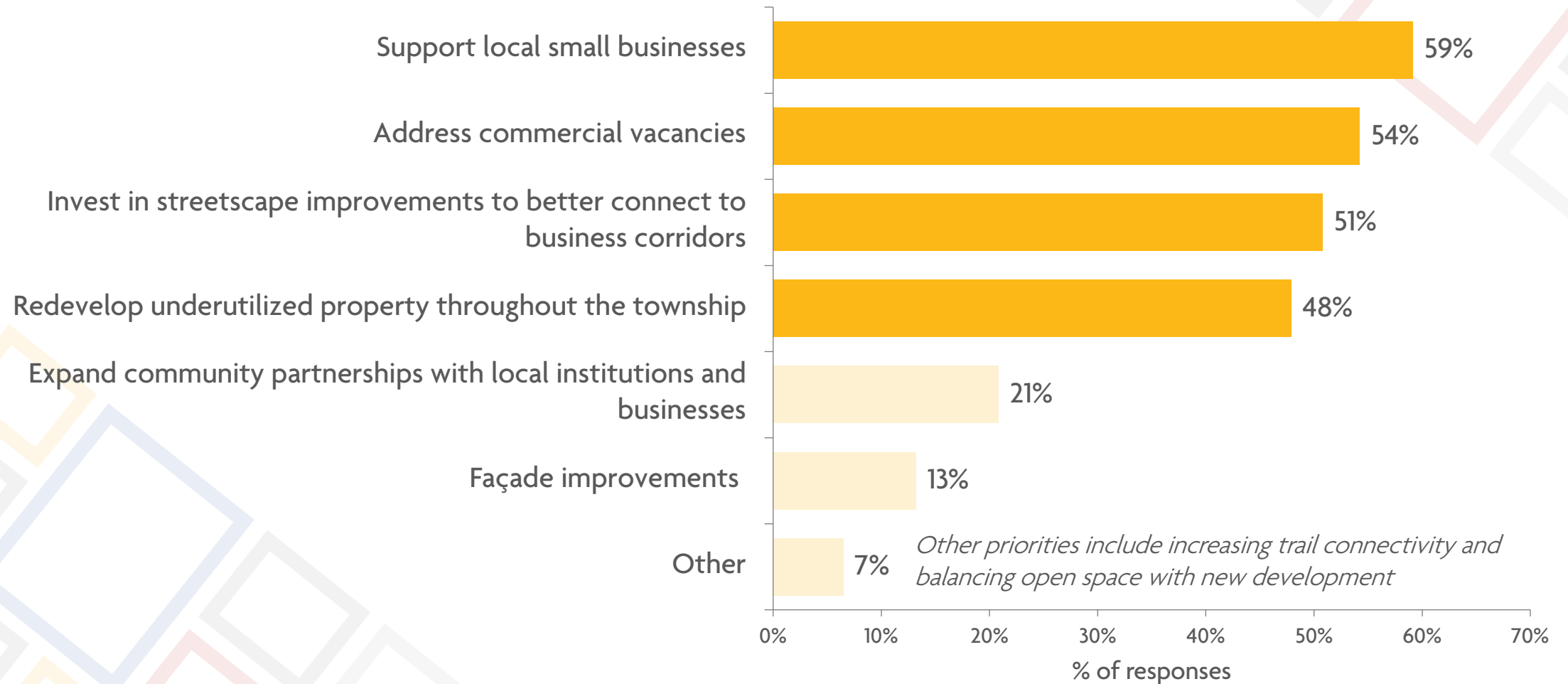
Business & Economic Development | I would visit commercial areas in UDT more often if there were...

Select all that apply Answered: 979 Skipped: 176



Business & Economic Development | **Priorities**

Select up to three Answered: 999 Skipped: 156



Business & Economic Development | Additional Comments & Takeaways

- Desire for neighborhood centers where they can shop locally and hang out with friends.
- Need for safe bike and pedestrian infrastructure to get to commercial areas.
- Want to see mixed-use spaces and redevelopment before new development.

*“Create a more **bike-friendly** and safe community.”*

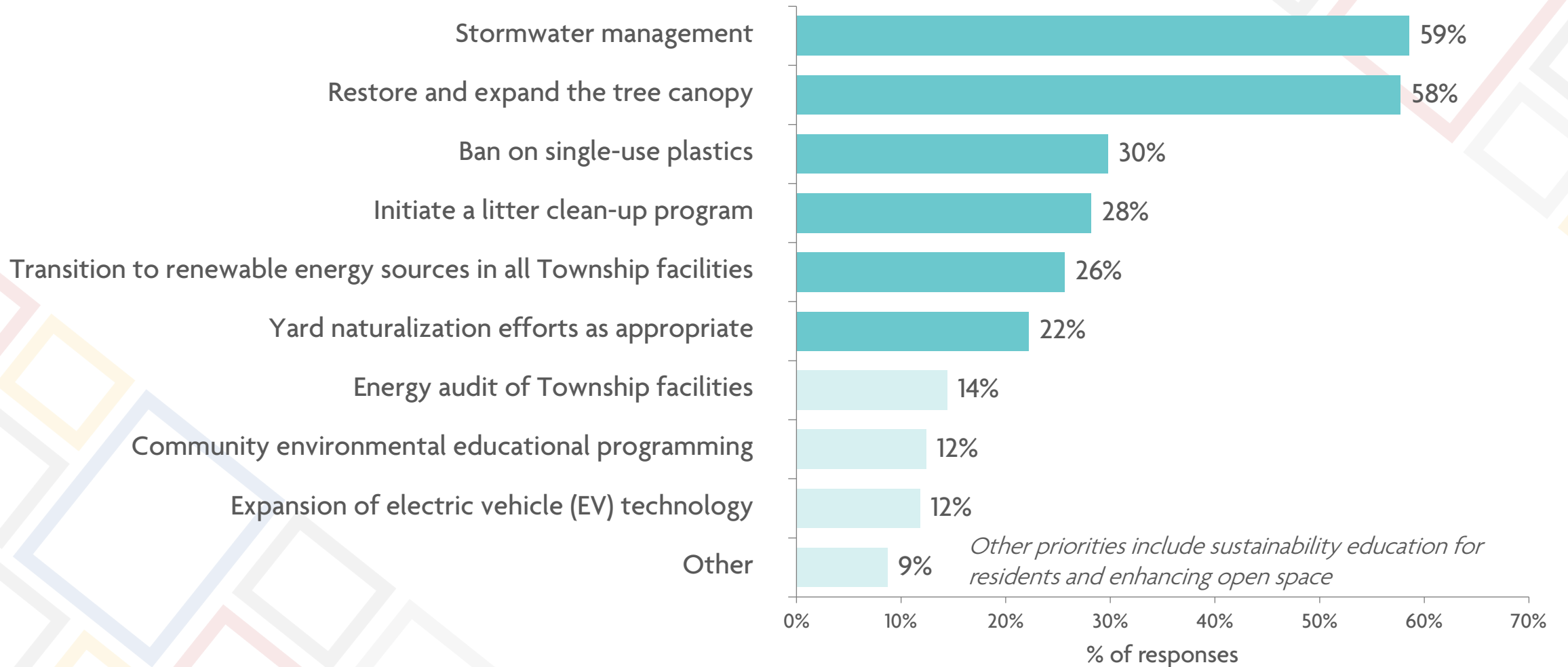
*“We need a **beautification** of central business areas.”*

*“Connect trails to be able to **walk and bike safely**. Trails and sidewalks abruptly closed forcing you to go on busy dangerous streets. E. G. Dresher town road from Dublin hunt to Dresher town shopping center or to the promenade.”*

*“Definitely prioritize **redeveloping** what we already have before building more and reducing our green space.”*

Environment & Sustainability | **Priorities**

Select up to three Answered: 992 Skipped: 163



Environment & Sustainability | Additional Comments & Takeaways

- Desire to see lawn naturalization efforts.
- Reduce noise pollution from 309.
- Need to retain and increase access to clean drinking water.
- Prioritize a shift to renewable energy for municipal properties and incentives for residents.
- Maintain and increase the current amount of open space.

*"I'd LOVE to see an effort to educate more people about how to replace **lawns with native plants/trees** and stop raking leaves to preserve habitats. I would also support any policies that can be adopted to force more homeowners to make these changes."*

*"Provide incentives and leadership for building and construction to **prioritize adaptive reuse and renovations, integrate renewable energy, exceed basic energy codes on insulation and airtightness, promote lower carbon mechanical systems and building materials, etc.**"*

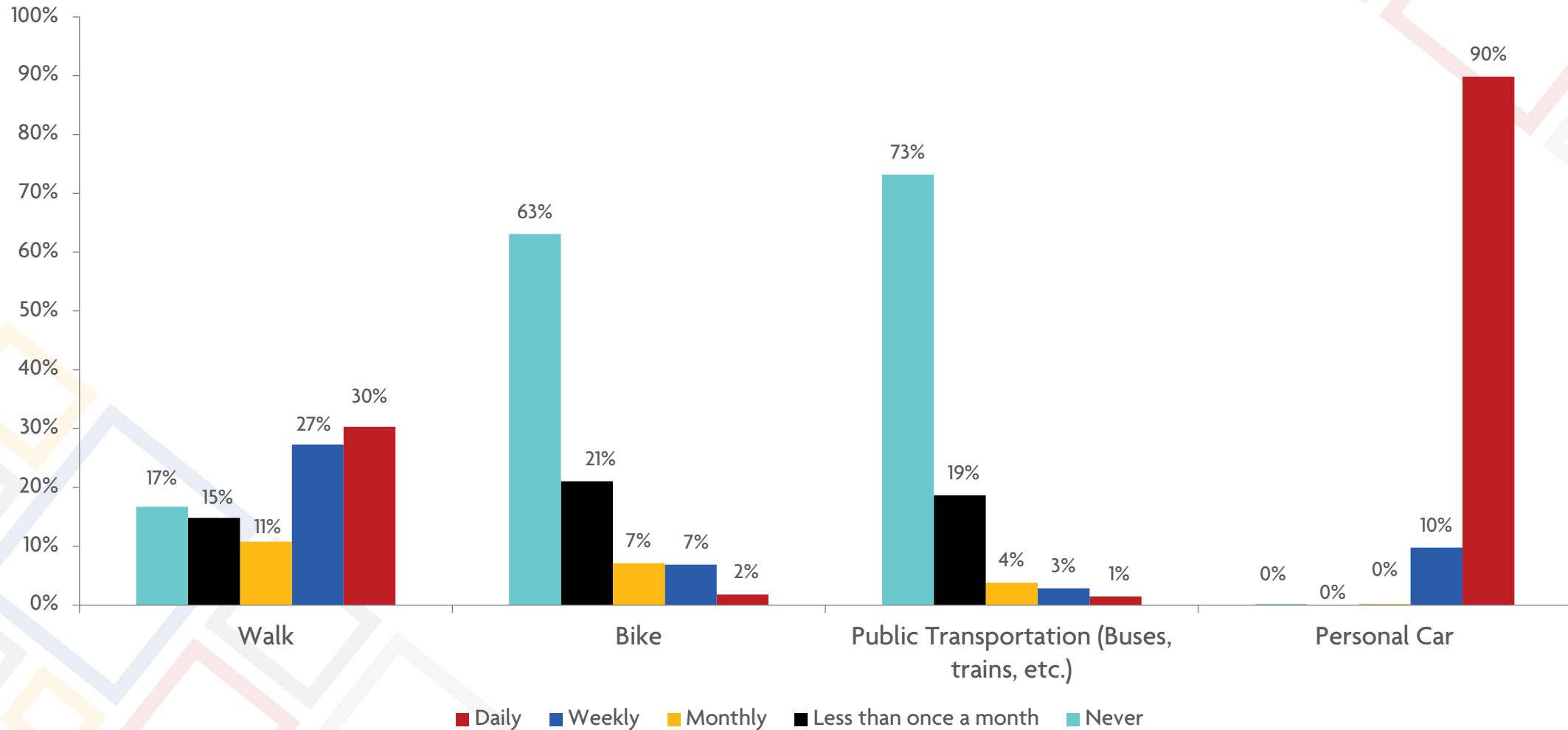
*"Clean water from **PFAS**."*

*"Allow a township **compost** collection bin."*

*"309 is covered with **litter**. 309 is noisy and we don't live that close by!!"*

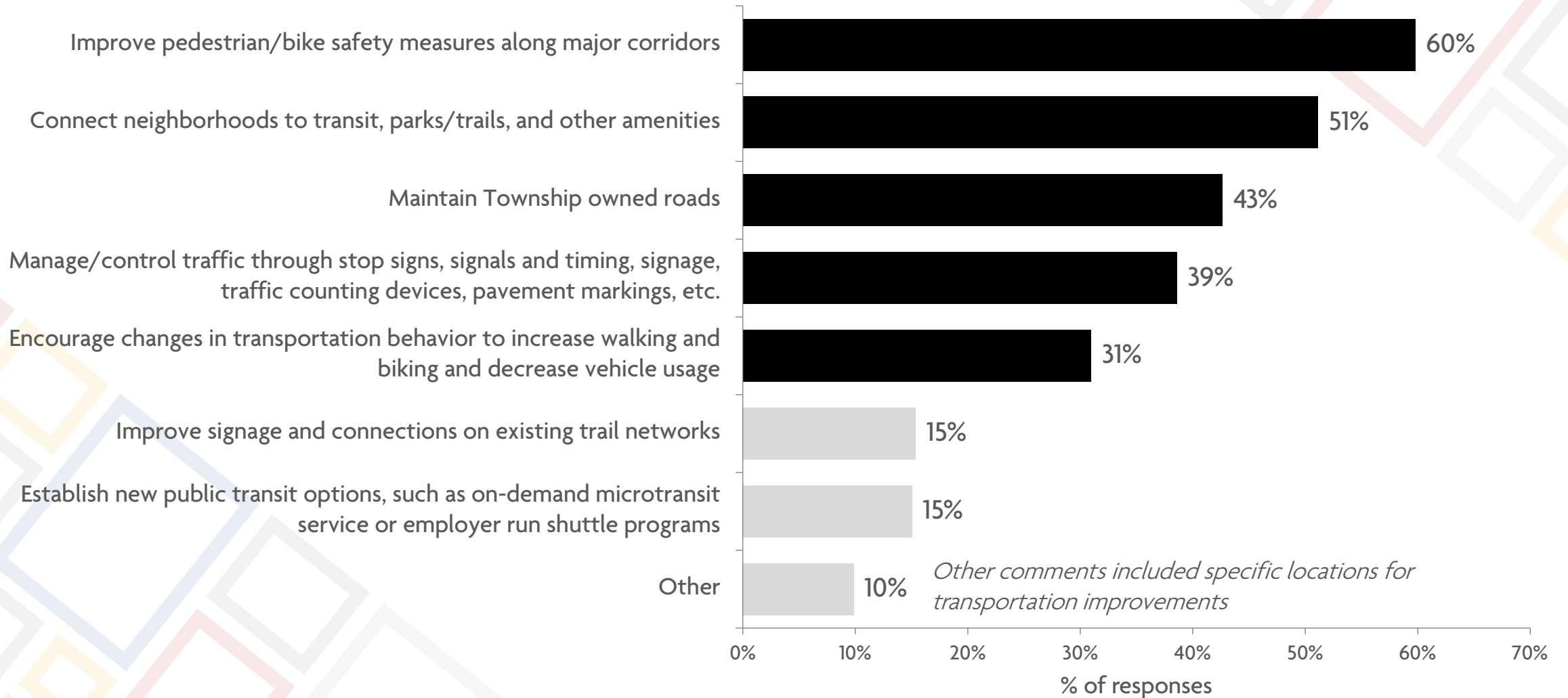
Transportation | To get around the Township I use...

Select all that apply Answered: 994 Skipped: 161



Transportation | Priorities

Select up to three Answered: 982 Skipped: 173



Transportation | Additional Comments & Takeaways

- Need for speed limit monitoring and traffic calming solutions.
- Identified infrastructure improvements including repainting crosswalks and lane lines, traffic light maintenance, etc.
- Safe bike and pedestrian connectivity is desired.

*“Create **more sidewalks, place speed bumps and speed-reducing measures** such as one-way streets or 4 way stop signs. Our kids bike daily to school without sidewalks and cross streets without lights or crossing guards.”*

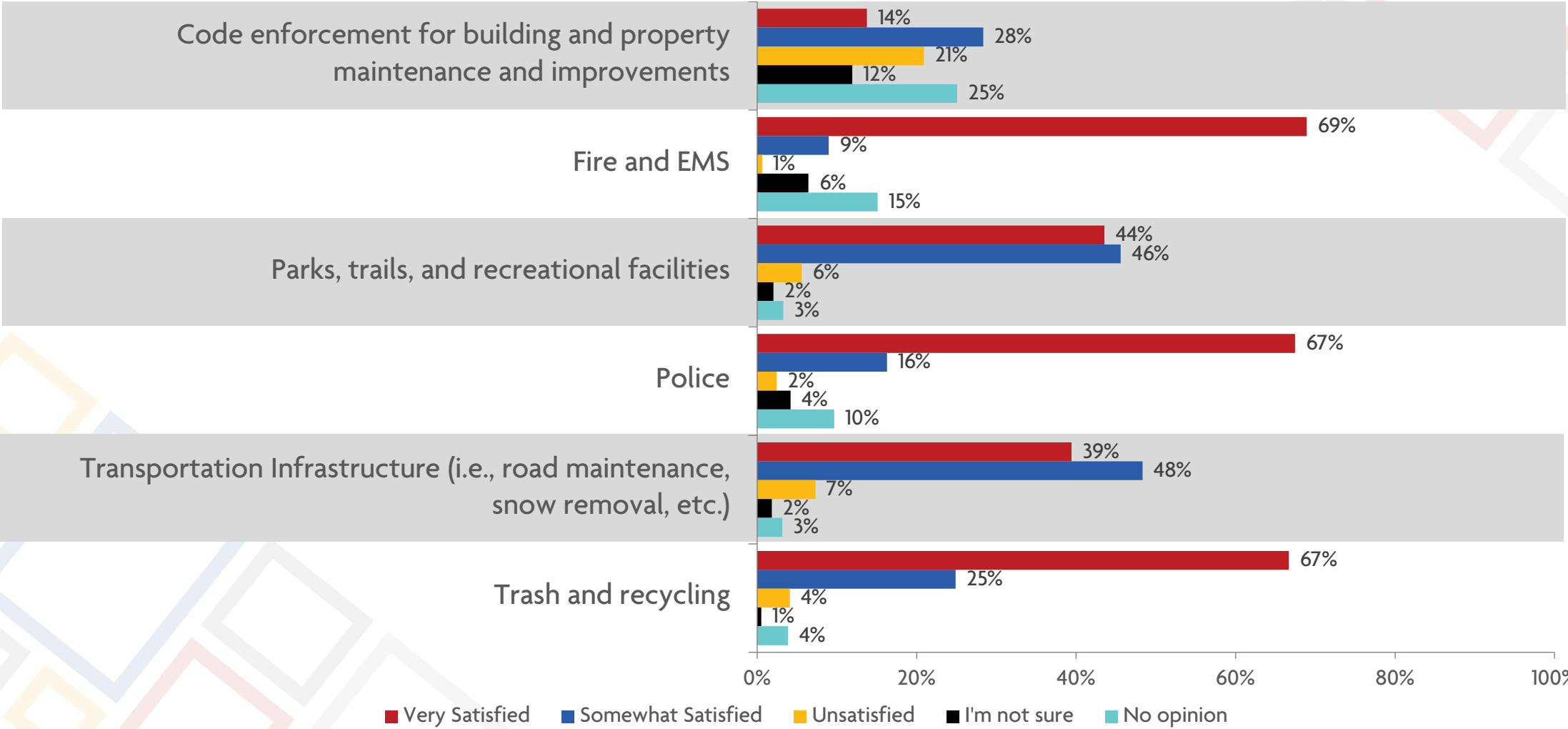
*“Improve **bad intersections** like North Hills Ave and Mt Carmel and the yield at Limekiln Pk and Jenkintown Rd.”*

*“Would love to walk more, but many roads just **do not feel safe** to do so.”*

*“Any neighborhoods connected to a major park via an intersection should have **safe crosswalks** (example: crossing over Susquehanna from the tail end of Dillon Road).”*

Township Services | Satisfaction Level

Select all that apply Answered: 993 Skipped: 162



Key Takeaways

- Respondents desire a more **walkable** and **bikeable** community.
- Housing variety/options are desired to **meet needs of aging population** and to **address housing affordability**.
- Respondents identified **permitting processes** as a major barrier/challenge to development and home renovations.
- Cherished assets include the Township's **open spaces** and **parks**.
- Roads are prone to **traffic congestion** and **speeding**.
- Respondents desire an identifiable **neighborhood center** with small businesses and places to relax.

Next Steps

- Feedback from the survey and pop-up events will be referenced as the consultant team, Township, and UD Plan Steering Committee determine the vision, focus areas, and recommendations for the plan.
- Community members are invited to stay updated on the process by signing up for updates on the Upper Dublin Township website (<https://www.upperdublin.net/our-township/comprehensive-plan>).
- A community open house will be held in June to share results from the survey and pop-ups, along with the draft vision and focus areas for the plan.



Appendix E: Market and Real Estate Analysis

This appendix includes the Market and Real Estate Analysis conducted by 4Ward Planning. Findings from this analysis are incorporated into UD Plan and Appendix C, the Planning Elements Profile.

DRAFT

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

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Executive Summary

Study Purpose

Working in collaboration with Michael Baker International, 4ward Planning Inc. is providing market, real estate, and fiscal feasibility analysis services to the Township of Upper Dublin in support of its Comprehensive Plan and Zoning Ordinance updates. Our market analysis presents socio-economic and labor and industry trends to better understand near- and long-term land-use demand, to establish expectations for market-receptive redevelopment/development. Our approach includes interviews with knowledgeable area real estate professionals. Through a combination of quantitative and qualitative analysis, we identify future commercial and residential land-uses which may be potentially accommodated within Upper Dublin Township. Our subsequent fiscal feasibility analysis will evaluate prospective buildout scenarios (particularly for housing) to help Upper Dublin Township officials understand the service cost-revenue dynamic of various land-use policy choices.

Figure 1. Study Scope and Process



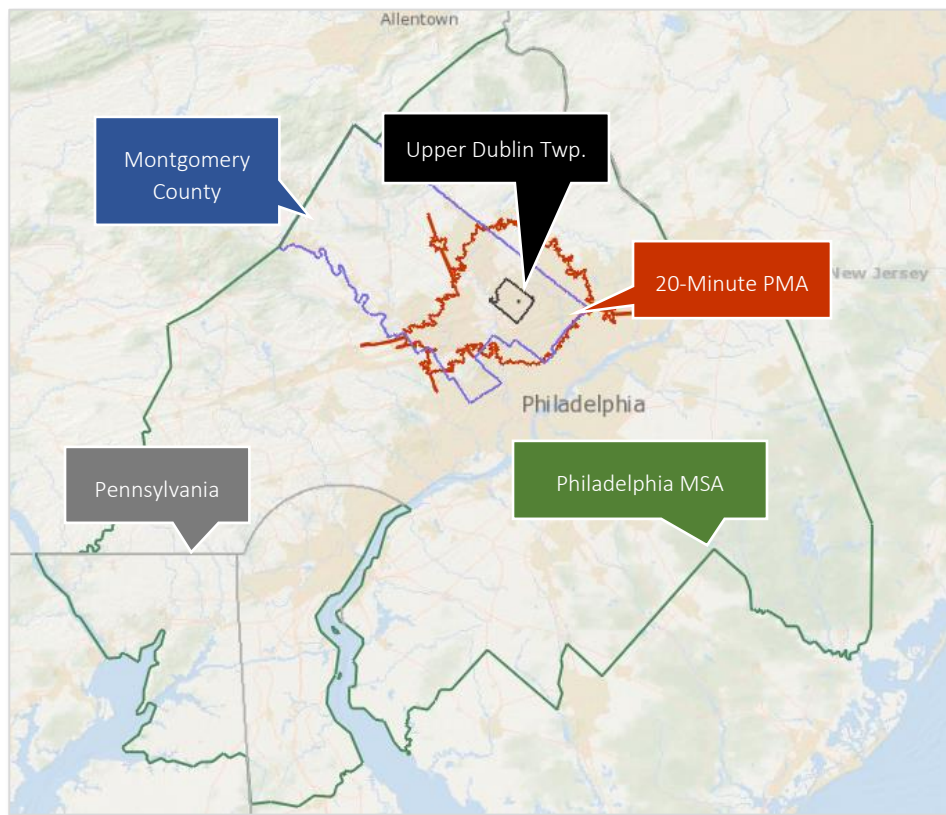
Study Areas

The market and real estate analysis examines the following study areas:

- **Upper Dublin Township:** Serves as the base area.
- **20-Minute PMA:** The Primary Market Area (PMA) represents the catchment area from which 70% or more of consumer patronage originates. For analysis purposes, it is defined as the 20-minute drive-time contour from Dreshertown Plaza, the township largest neighborhood shopping center. The center is also located a mile from the Fort Washington Office Park, the township's only business park.
- **Montgomery County:** Serves as the Secondary Market Area (SMA), representing a larger catchment area from which the township could prospectively compete for new residents and businesses.
- **Philadelphia MSA:** The Philadelphia-Camden-Wilmington, PA-NJ-DE-MD Metropolitan Statistical Area (MSA) includes 11 counties in New Jersey, Pennsylvania, Delaware, and Maryland.
- **Pennsylvania:** As defined by state borders.

Data on additional real estate submarkets is provided in the real estate section. More details regarding the methodology and sources utilized in this analysis are provided in each section.

Figure 2. Study Areas



Source: Esri

Market Opportunities and Challenges

Residential

Allowing for a greater variety of housing stock in the township could help attract and retain younger adults, who are more likely to rent by choice or financial need, or empty nesters interested in downsizing into smaller, lower-maintenance homes with amenities (e.g., townhouses or condominiums, with single-floor living options).

Compared to the PMA, the township is much more suburban in nature with just 810 housing units per square mile, compared to 1,230 units with the PMA. This is likely due to the township's relatively large share of its housing owner-occupied (81%) and characteristic of single-family homes (75%). Our interviews with local real estate professionals suggest there is demand for more diversity of housing types in the township, including more townhome and single-floor living options. Promoting a greater diversity of housing could help create a more sustainable and inclusive community. For example, allowing for a greater diversity of housing stock in the township could help attract and retain younger adults, who are more likely to rent by choice or financial need, or empty nesters interested in downsizing into smaller, lower-maintenance homes with amenities (e.g., townhouses or condominiums, with single-floor living options). According to feedback from real estate professionals, this is likely the target multi-family rental market for the 310-unit J at Dresher (Jefferson) luxury apartment project currently under construction in the township.

With over 37,320 primary job workers commuting more than 25 miles to work in the PMA, a variety of factors are likely limiting the ability of these workers to live closer to work (e.g., high housing costs, tight vacancies, limited housing choice). As a result, there is likely pent-up housing demand, as a small portion of these workers would presumably trade a long commute if adequate housing were available closer to their place of employment. Furthermore, the county's unemployment rate is historically low (2.7% as of October 2023), indicative of an extremely tight labor market. Some companies may face challenges in expanding or meeting consumer demand, due to a limited pool of workers and a tight housing market.

Largely due to estimated pent-up demand from workers who commute into the township, by 2028, there will be an estimated net demand for approximately 14,072 residential units in the PMA. If buildable residential land were available in the township, 4ward Planning conservatively assumes that the township could have an opportunity to capture between 6% and 10% of pent-up residential demand in the PMA, equivalent to between approximately 844 and 1,407 units by 2028.

Senior Housing

The township has a relatively large share of age-restricted housing units. Consideration should be given to allowing some of these developments to transition from “age-restricted” to “age-targeted,” in anticipation of future shifts in housing needs and preferences.

While the traditional senior housing market (composed of majority independent living, assisted living, or nursing care facilities) was profoundly impacted by the Covid-19 pandemic, the relatively new active adult senior housing product has been booming in recent years - due to the large baby boomer population (representing persons born between 1946 and 1964) that is aging yet remaining physically active and desiring higher-end recreation and community amenities. Active adult facilities are also attractive to developers, as they typically command rent premiums and require fewer healthcare licenses and operational costs.

Currently, age-restricted residential communities and independent living units represent 7% of all housing units in Upper Dublin Township (compared to just 3% of all housing units in the PMA). Not surprisingly, given this large inventory, the township also has a relatively large share of residents ages 55 and older - a “target market” for potential new senior housing development aimed at those interested in remaining in the township as they age.

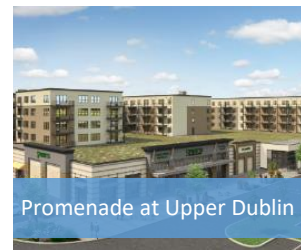
Overall population and household growth in both the township and the larger Philadelphia MSA region are projected to be relatively flat through 2028. Absent significant public or private sector investment (e.g., developer investment or a new major employer moving into the region), near-term housing demand will come from shifts in household needs and preferences rather than from household growth. From 2023 to 2028, PMA residents ages 65 and older are projected to increase by 15,315 (an 11% increase). This near-term increase in PMA residents ages 65 and older should drive additional demand for senior housing, which could be captured in the township (the average age for active adult and independent living housing is 73 years and mid-80s, respectively).

With the youngest baby boomer (born in 1964) reaching 100 years in the year 2064, long-term demand for senior housing in the region will continue to change over the next 40 years. As the sizable baby boomer population continues to age, and housing needs and preferences shift, there will likely be an oversupply of age-restricted homes and apartments in the township. Consideration should be given to allowing some of these developments to transition from “age-restricted” to “age-targeted,” providing amenities and design options consistent with the needs of active adults, while not mandating a specific resident age.

Retail

Underutilized commercial sites could be redeveloped to include mixed-use housing like the Promenade at Upper Dublin.

The Philadelphia MSA’s retail market has been slowly rebounding since the Covid-19 pandemic and has seen positive year-to-date net absorption of retail space. Montgomery County is a major retail hub and is strong in terms of retail occupancy and demand. There are four shopping centers in Upper Dublin Township containing approximately 348,300 square feet of retail shopping center space. Specifically, there are three existing neighborhood shopping centers (Dreshertown Plaza Shopping Center, Fairway Shopping Center, and Maple Glen Shopping Center) and one recently completed community shopping center (the Promenade at Upper Dublin lifestyle center) – the latter of which was 95% leased by December 2023. Neighborhood centers are defined as being between 30,000 to 150,000 square feet featuring supermarkets and small tenants, while community centers are defined as being between 100,000 to 350,000 square feet featuring discount department stores, supermarkets, home improvement stores, and large category dominant stores (e.g. Office Max)



New housing in the township could increase its customer base and help attract and support additional food and beverage establishments.

The average household in the PMA spends approximately \$2,230 per year on dining out at full-service restaurants (66% on dinner) and \$2,130 per year on dining out at fast food, takeout, or delivery food establishments, totaling nearly \$4,360 per year on food away from home (53% on dinner). Potential new housing development in the township (e.g., higher-density townhomes or apartment developments, in particular) could increase the township’s overall household density and customer base, which could help attract and support more food and beverage establishments.

Office

The Township should continue to support existing zoning with exceptions for certain parcels that will likely not be occupied for office use.

Upper Dublin is located in Montgomery County’s combined Blue Bell/Plymouth Meeting/Fort Washington office submarket, which contains 19% of the suburban Philadelphia market’s office space. As of third-quarter 2023, this combined submarket had the highest overall office vacancy (26.8%) of all of the submarkets in the suburban Philadelphia office market – suggesting there is a relatively high oversupply of available office space in the office submarket. Located at the crossroads of the PA Turnpike and PA Route 309, the 536-acre Fort Washington Office Park is the township’s only business park. According to discussions with two local brokers and data provided by Costar, largely due to demand for smaller office footprints, Fort Washington Office Park’s vacancy rate (14%) is relatively healthy compared to the suburban Philadelphia office market. Based on the health of the Fort Washington Office Park and responses from local commercial brokers, the Township should continue to support existing zoning with exceptions for certain parcels that will likely not be occupied for office use.

Market Analysis

The following section presents socio-economic and labor and industry findings.

Socio-Economic Analysis

Methodology

Using historical trend data, current year estimates (2023), and five-year projection data (2028) provided by Esri Community Analyst (a proprietary analysis software), 4ward Planning analyzed socio-economic trends and projections across selected base and market study areas. Socio-economic trends associated with population, households, age distribution, educational attainment, income distribution, and household expenditure estimates (including dining out expenditures) are analyzed.

Socio-Economic Trends

Population and Households

Population and household growth in the township are projected to be relatively flat through 2028. Absent significant investment, near-term local demand for new goods and services will come from shifts in household needs and preferences rather than from household growth.

Near-term land-use demand in the township is largely driven by population growth and new household formation in the PMA. Areas where the population is growing, particularly if it is growing rapidly, are more attractive markets than are areas where the population is flat or in decline. According to Esri, a private firm that compiles socio-economic census data for various geographies, the 20-minute PMA is expected to increase by approximately 3,280 residents through 2028. The rate of population growth in the PMA has been declining over the past two decades. The projected rates of population growth in both the township and PMA are expected to be relatively flat through 2028 (0.4% and 0.1% per year, respectively). Population and household projections suggest there will be relatively flat regional near-term market demand for new goods and services. Absent significant public or private sector investment, near-term market demand for new goods and services will come from shifts in household needs and preferences (notably among the aging baby boomer population) rather than from household growth.

Figure 3. Population Trends, Estimates, and Projections

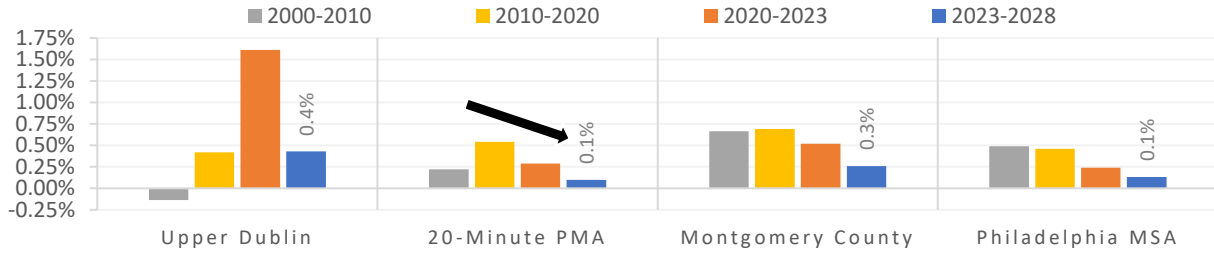
Township	Counts			Estimates	Projections	2023-2028	
	2000	2010	2020	2023	2028	Change	Annualized % Change
Upper Dublin	25,920	25,569	26,665	28,085	28,691	606	0.43%
20-Minute PMA	619,928	633,651	668,869	675,230	678,513	3,283	0.10%
Montgomery County	750,097	799,874	856,553	871,229	882,409	11,180	0.26%
Philadelphia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

Source: Census; Esri

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Figure 4. Annualized % Population Change Trends and Projections



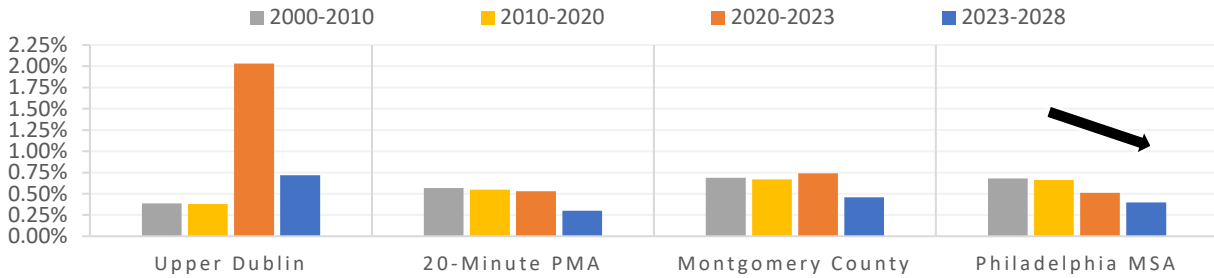
Source: Esri

Figure 5. Household Trends, Estimates, 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%

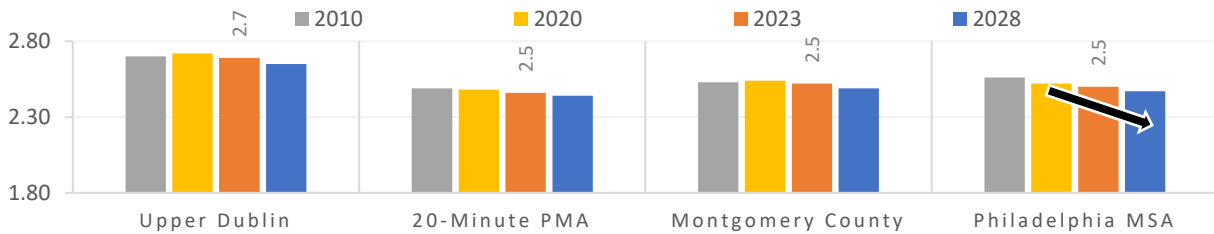
Source: Census; Esri

Figure 6. Annualized % Household Change Trends and Projections



Source: Esri

Figure 7. Household Size Trends and Projections



Source: Esri

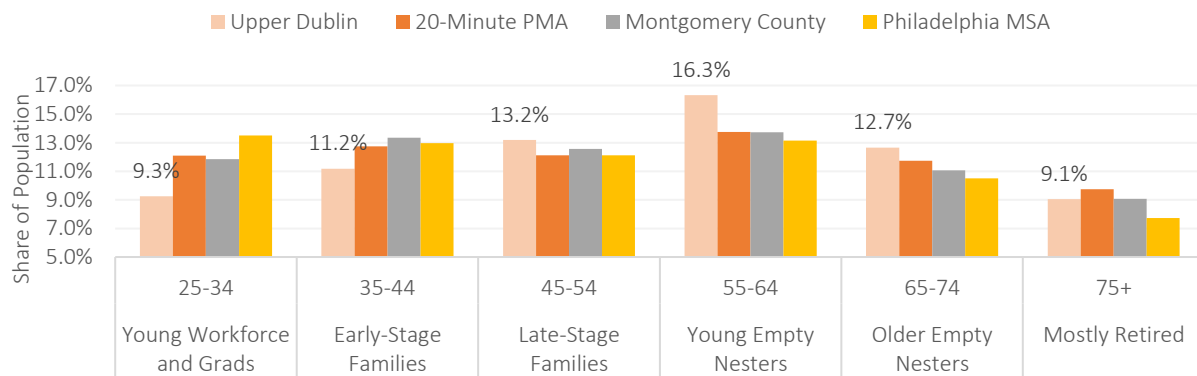
Age Distribution

Population and household growth in the township are projected to be relatively flat through 2028. Absent significant public or private sector investment, near-term local demand for new goods and services will come from shifts in household needs and preferences rather than from household growth.

Household needs and preferences tend to change as people age due to various factors, including shifts in income, family structure, lifestyle preferences, and financial priorities. As illustrated in Figure 8 below, young empty nesters (those between ages 55 and 64) represent the top age cohort by share of adult township residents (16.3%), while the young workforce and grads cohort (between ages 25 and 34) represent the smallest share of adult residents in the township (9.3%). While the youngest adult cohort may choose to rent by choice or financial need, empty nesters may choose to downsize into smaller homes, townhouses, or condominiums.

According to a Redfin study which analyzed 2022 American Community Survey census data, empty nesters (baby boomer households with no children in the home) in the Philadelphia metro own 28% of the nation’s large homes (those with three or more bedrooms), while millennial households with children own less than half as many (13%). The Philadelphia metro ranks 18 among U.S. metros where empty-nester baby boomers own the highest share of large homes.¹ Part of this householder-housing size imbalance is due to the lack of financial incentives for empty nesters to let go of large homes (many have already paid off their mortgages). These older households choosing to age in place are driving demand for age-in-place services (e.g. home healthcare workers are one of the top occupations in the nation in terms of projected job growth).

Figure 8. Adult Population Distribution by Life Stage, 2023

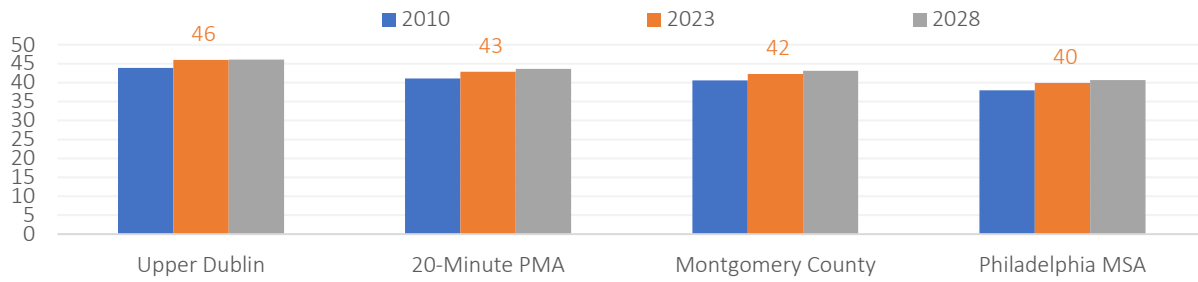


Source: Esri

¹ Redfin, Empty Nesters Own Twice as Many Large Homes as Millennials With Kids, January 16, 2024

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Figure 9. Median Age



Source: Esri

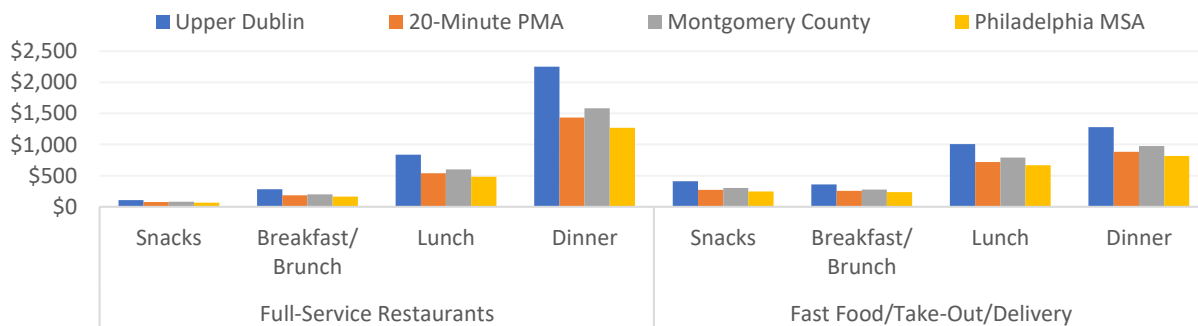
Educational, Income, and Spending Levels

The average household in the PMA spends approximately \$4,360 per year on food away from home. New housing in the township could attract more households and help support more food and beverage establishments.

Educational attainment and income levels are relatively high in the township. For example, 70% of the township’s adult population ages 25 and older have attained a bachelor’s degree or higher, compared to 43% in the MSA. Since educational attainment is often strongly and positively correlated with income, it is not surprising the median household income in the township (\$155,407) is also significantly higher than that in the MSA (\$83,525). People with higher incomes tend to have higher disposable incomes and the ability to spend more on non-essential items, which can help support local businesses.

For example, the average township household spends approximately \$2,230 per year on dining out at full-service restaurants (66% on dinner) and \$2,130 per year on dining out at fast food, takeout, or delivery food establishments, totaling \$4,360 per year on food away from home (53% on dinner). Potential new housing development in the township (e.g., higher-density townhomes or apartment developments, in particular) could increase the township’s overall household density and customer base, which could help attract and support more food and beverage establishments.

Figure 10. Average Annual Household Expenditures on Dining Out, 2023

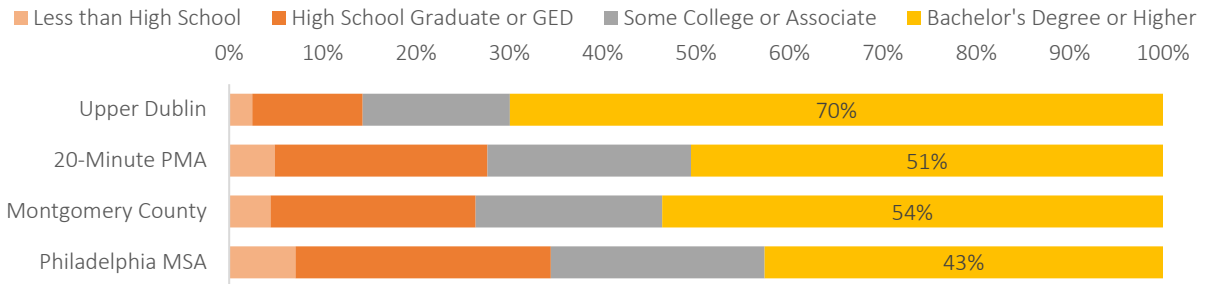


Source: Esri

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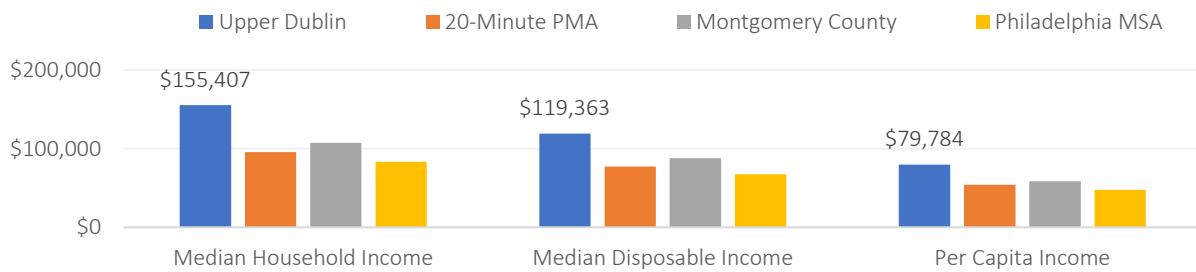
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Figure 11. Educational Attainment by Share of Adult Population (25+ Years)



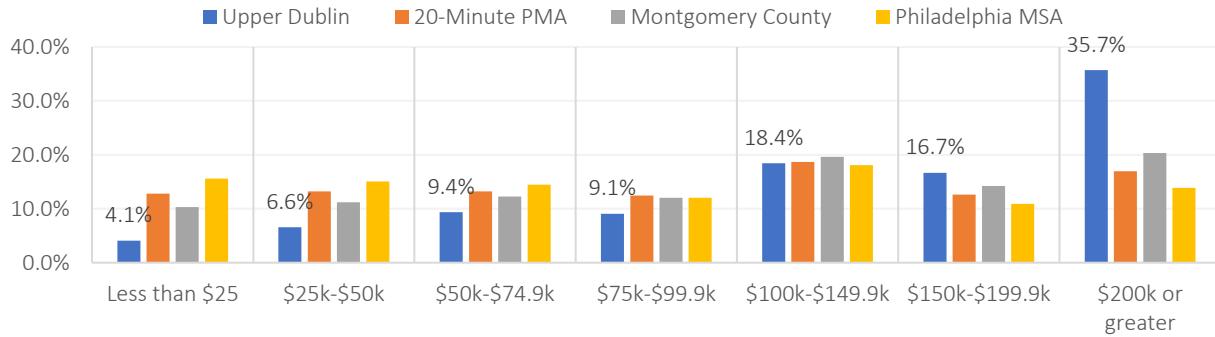
Source: Esri

Figure 12. Income Comparisons, 2023



Source: Esri

Figure 13. Household Income Distribution, 2023



Source: Esri

Labor and Industry Analysis

Methodology

4ward Planning identified the top 10 employers in Montgomery County, according to second-quarter 2023 data provided by the Pennsylvania Department of Labor and Industry's Quarterly Census of Employment and Wages. 4ward Planning analyzed labor force (employed and unemployed persons) trends across North American Industry Classification System (NAICS) two-digit major industry sectors for Montgomery County based on data provided by the Quarterly Census of Employment and Wages (first-quarter 2017 through first-quarter 2023). Average earnings data by top industry sector is based on fourth-quarter 2022 average earnings data provided by the U.S. Bureau of Labor Statistics (BLS) for Montgomery County. Next, 4ward Planning compared historical unemployment rate trends (2000 to 2023) for Montgomery County, the Philadelphia MSA, and Pennsylvania, according to non-seasonally adjusted monthly unemployment data provided by BLS, as of October 2023.

To better understand the potential pent-up housing demand from commuting primary job workers, 4ward Planning analyzed primary job trend data (2002 to 2021) provided by the U.S. Census Bureau's Center for Economic Studies for the 20-minute PMA. Primary job data for 2021 represents the latest year provided. A primary job represents the highest paying job for an individual worker for the year, and the count of primary jobs is equivalent to the count of workers in a given location.

Labor and Industry Trends

Employment and Earnings

The county's largest employer, Merck Sharp & Dohme Corporation, is located at the edge of the 20-minute PMA. This manufacturing sector employer provides relatively high-wage job opportunities in the county.

According to second-quarter 2023 data provided by the Quarterly Census of Employment and Wages, Merck & Company, Inc., a pharmaceutical firm and manufacturing sector employer, is the top employer in Montgomery County. The Merck Sharp and Dohme Research Lab is located at the northern edge of the 20-minute PMA, nine miles northwest of the township's boundaries. The manufacturing sector provides relatively high-wage job opportunities in the county (\$111,300 per year as of fourth-quarter 2022) and has seen recent job growth (increasing by 1,850 jobs from first-quarter 2017 to first-quarter 2023).

Three of the top five employers in the county are within the health care sector (Abington Memorial Hospital, Main Line Hospitals, and Albert Einstein Medical Center). Not surprisingly, the health care and social assistance sector currently represents the county's top sector by employment (16% of total jobs as of first-quarter 2023). This sector is also the top sector by recent employment growth in the county (increasing by 11,180 jobs from first-quarter 2017 to first-quarter 2023). This sector provides relatively mid-wage job opportunities (\$63,350 per year as of fourth-quarter 2022).

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The finance and insurance, and professional, scientific, and technical services (PSTS) sectors (the second and fourth largest sectors by employment in the county) also saw recent job growth in the county, increasing by 5,690 and 3,500 jobs, respectively, from first-quarter 2017 to first-quarter 2022. These two sectors provide relatively high-wage job opportunities (\$121,550 and \$134,480 per year, respectively).

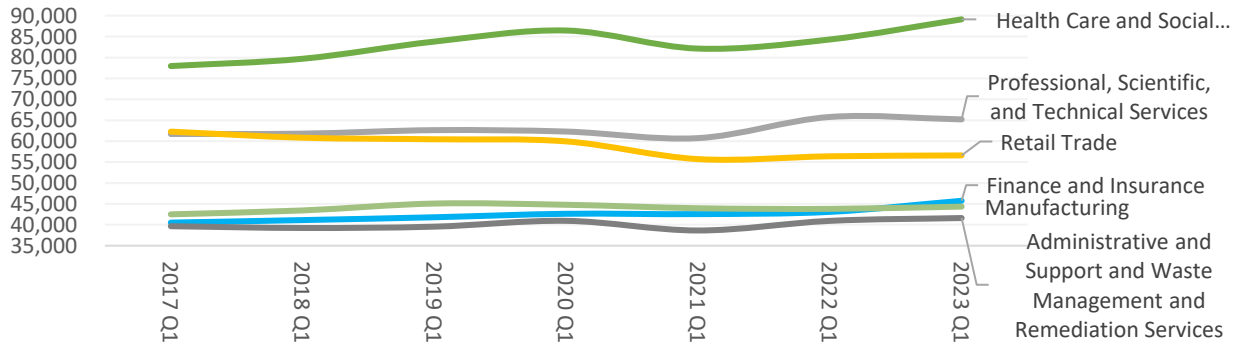
While employment among the county’s top sectors have recovered to pre-pandemic levels or higher, retail trade, a sector that was declining even before the pandemic, remains below pre-pandemic levels. The pandemic likely accelerated existing trends in retail that were causing further challenges for traditional retailers and impacting sector employment (e.g., rise of e-commerce, self-checkout systems, consolidation, bankruptcies, and shifting consumer preferences). Retail trade provides relatively low-wage job opportunities (\$44,616 per year).

Figure 14. Top 10 Employers in Montgomery County

Rank	Employer	Rank	Employer
1	Merck Sharp & Dohme Corporation	6	SmithKline Beecham Corporation
2	Abington Memorial Hospital	7	SEI Investments Company
3	Main Line Hospitals Inc	8	Giant Food Stores LLC
4	State Government	9	Lockheed Martin Corp
5	Albert Einstein Medical Center	10	Federal Government

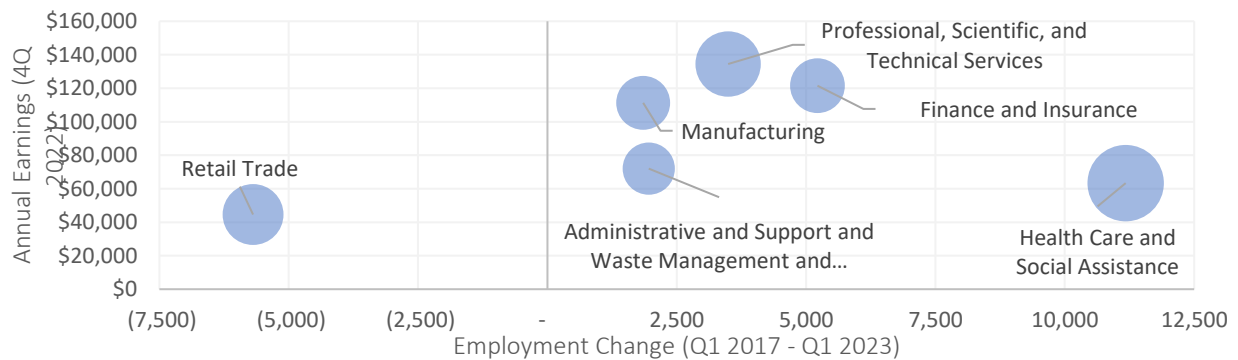
Source: PA Department of Labor and Industry, Quarterly Census of Employment and Wages, 2Q 2023

Figure 15. Employment Trends by Top Six Industries by Employment: Montgomery County



U.S. Census Bureau, Center for Economic Studies, LEHD

Figure 16. Top Six Industries by Employment and Earnings



Note: Bubble size represents employment in Montgomery County as of first-quarter 2023.

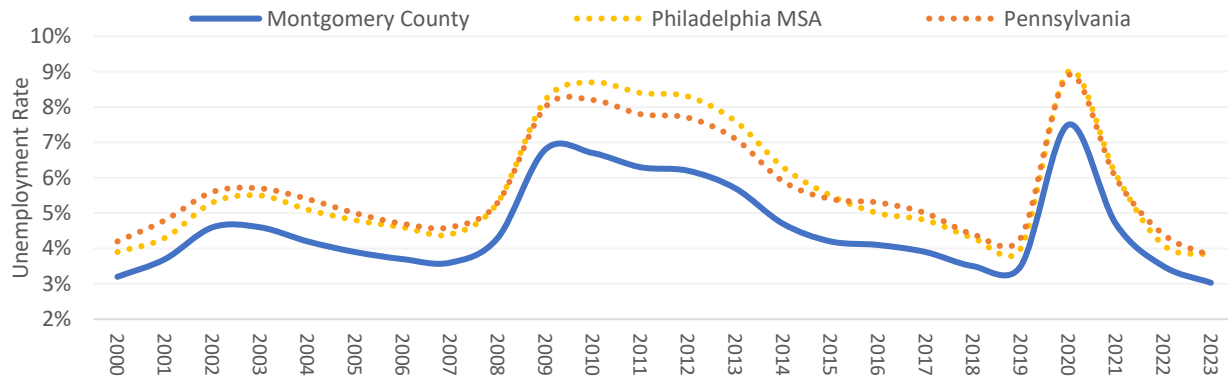
Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Unemployment Rate

The county's unemployment rate is historically low, indicative of an extremely tight labor market. Some companies may face challenges in expanding or meeting demands due to a limited pool of workers.

According to non-seasonally adjusted monthly unemployment data provided by the U.S. Bureau of Labor Statistics (BLS), Montgomery County's current unemployment rate (2.7% as of October 2023) is historically very low (the lowest it has been in over two decades). Furthermore, over the past three decades, the county's unemployment rate has been consistently lower than that in the MSA and state, suggesting it has a relatively tight labor market. In October 2023, the county's unemployment rate was also relatively low compared to that observed in the Philadelphia MSA (3.6%) and state (3.2%). While a tight labor market with very low unemployment can drive up wages as companies compete for skilled workers, some companies may face challenges in expanding or meeting demands due to a limited pool of workers.

Figure 17. Average Unemployment Rate Trends



Note: 2023 data is as of October 2023.

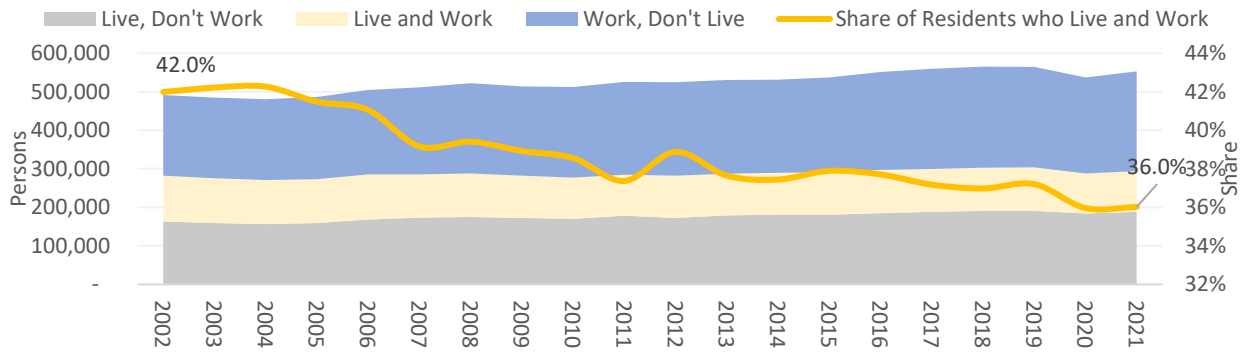
Source: U.S. Bureau of Labor Statistics

Commuting Workers

Over 37,000 primary workers commute more than 25 miles to work in the PMA, suggesting there is likely pent-up housing demand, as some of these workers would trade a commute if adequate housing were available closer to work.

Commuting workers represent pent-up housing demand, as some may trade a long commute if quality workforce housing were available closer to work. According to 2021 primary job data based on employer and employee locations provided by the U.S. Census Bureau (the latest year provided), 258,450 primary job workers commuted into the 20-minute PMA for work (70.9% of primary workers in the PMA), and 188,140 residents commuted outside the PMA for work (resulting in net in-migration of primary job workers).² In 2021, 37,320 primary workers in the PMA commuted more than 25 miles to work, suggesting there is likely pent-up housing demand, as some workers may trade a long commute if quality affordable housing were available in the PMA. From 2002 to 2021, the share of residents both living and working in the PMA declined by approximately 6%, suggesting an increasing local jobs/housing imbalance.

Figure 18. Primary Worker Inflow/Outflow Trends: 20-Minute PMA



*Note: Figures are based on U.S. Census employer and employee location data.
Source: U.S. Census Bureau Center for Economic Studies, LEHD, 2021*

Figure 19. Distance to Work: 20-Minute PMA Primary Workers, 2021



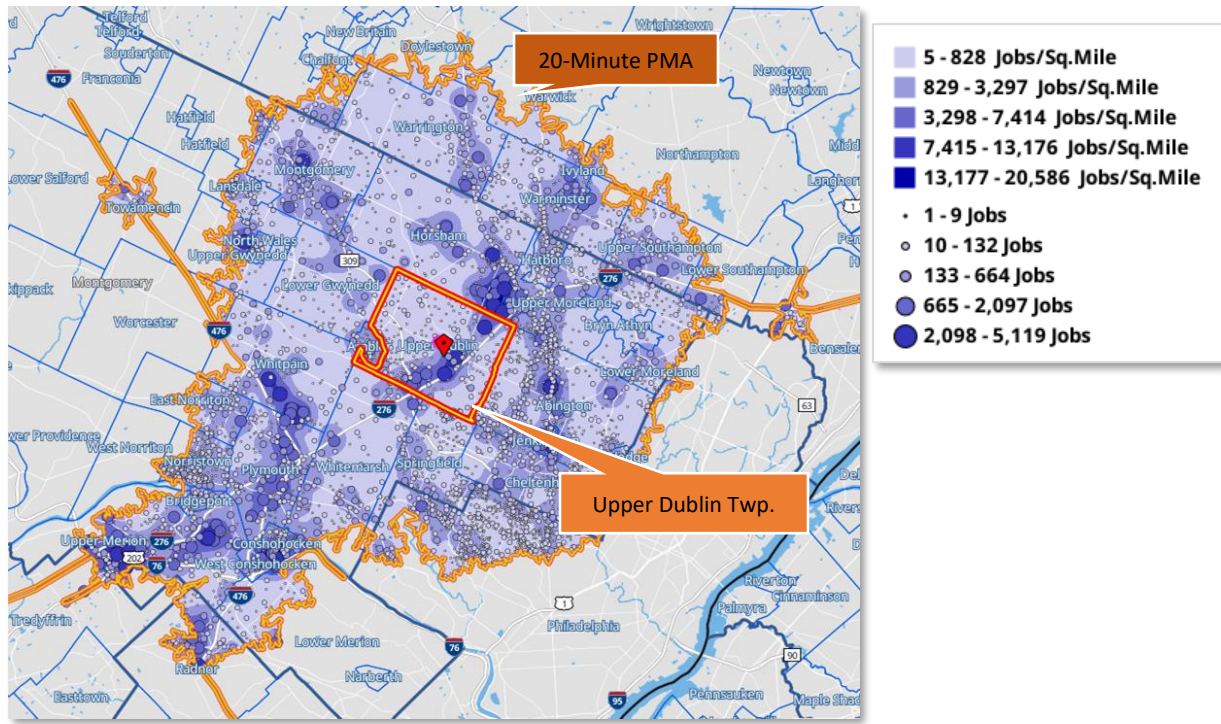
² A primary job represents the highest paying job for an individual worker for the year, and the count of primary jobs is equivalent to the count of workers in a given location.

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Note: Figures are based on U.S. Census employer and employee location data.
Source: U.S. Census Bureau Center for Economic Studies, LEHD, 2021

Figure 20. Primary Job Clusters: 20-Minute PMA, 2021



Source: U.S. Census Bureau Center for Economic Studies, LEHD, 2021

Real Estate Analysis

The following section presents real estate analysis methodology and findings for office, retail, residential, and senior housing. The real estate analysis was supplemented with outreach to knowledgeable area real estate professionals (see Appendix), in order to “ground truth” data findings.

Office

Methodology

According to Coldwell Banker Richard Ellis (CBRE) (a commercial real estate services and investment firm), Upper Dublin is largely located in the eastern portion of Montgomery County’s Fort Washington office submarket. To better understand potential office demand in the township, 4ward Planning analyzed key office metrics (e.g., inventory, absorption, vacancy, asking rents) based on third-quarter 2023 data provided by CBRE. Data is presented for the larger Philadelphia MSA office market and Suburban Philadelphia office submarket, as well as the combined Blue Bell, Plymouth Meeting, Fort Washington submarket (data is not provided at the Fort Washington submarket level).

To better identify formal office employment centers in the township, business parks were mapped based on data provided by the Montgomery County Planning Commission. For inclusion in this inventory, a development must have at least 75,000 square feet of office, industrial, or flex space and the park must be branded as a single entity regardless of ownership. This inventory includes traditional office buildings and industrial facilities, as well as flex spaces which offer more customization than traditionally developed structures. Vacancy data for the Fort Washington Office Park (the township’s only business park) is based on data provided by Costar, the nation’s leading authority on commercial and industrial real estate metrics.

Figure 21. Philadelphia MSA Office Submarkets

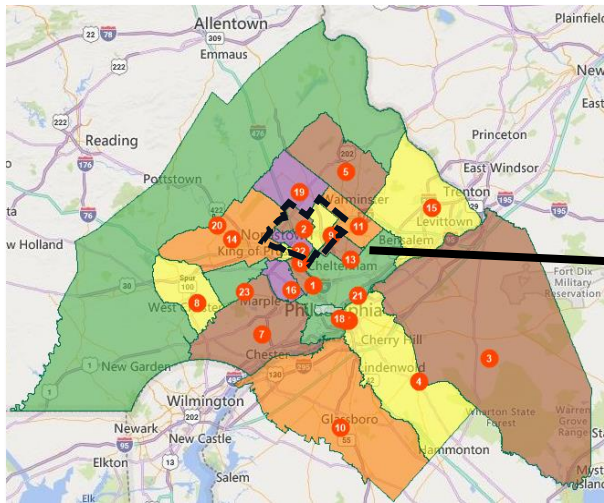
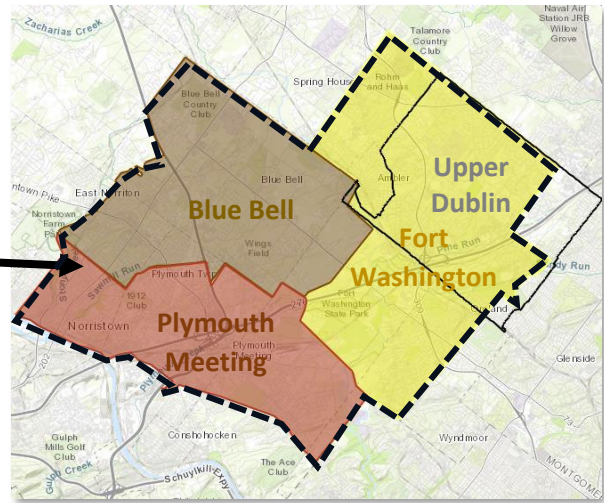


Figure 22. Blue Bell/Ply. Mtg./ Ft. Wash Office Submarket



Source: CBRE

Office Trends

Suburban Philadelphia Office Market

Office vacancy rates in the Suburban Philadelphia office market remain well above pre-pandemic levels, suggesting office project sponsors proceed with caution.

According to data provided by Cushman & Wakefield, a commercial real estate brokerage and real estate data company, the Suburban Philadelphia office submarket contains nearly 62.4 million square feet of existing office space (46% of that in the Philadelphia MSA), making it vulnerable to changes in the office market. Like much of the nation, the Suburban Philadelphia's office market has experienced rising office vacancy rates and net negative absorption over the past three years - due to the rise of remote and hybrid work models, spurred by the Covid-19 pandemic and decreasing demand for traditional suburban office space. As of third-quarter 2023, the Suburban Philadelphia office market experienced a negative net absorption of 1.5 million square feet of office space (meaning, more space became available for lease than space leased during the quarter). Although the office market is expected to stabilize over the next year, as more companies implement return-to-office mandates, office vacancy rates remain well above pre-pandemic levels, suggesting office project sponsors proceed with caution.

Converting some underused office space (those which have footplates accommodative of adaptive reuse for residential) is a key part of post-pandemic plans in many cities to create much-needed housing. According to a January 2024 report published by RentCafe, a provider of real estate data, the Philadelphia metro's current pipeline for converting old office buildings into new apartments is ranked 14th among the nation's 387 metros. The Philadelphia metro area is converting 975 units from office spaces, which is 19.1% of the region's conversions and a notable 136% increase from 2022³

Montgomery County Office Submarket

The combined Blue Bell/Plymouth Meeting/Fort Washington submarket has the highest overall office vacancy in the suburban Philadelphia market.

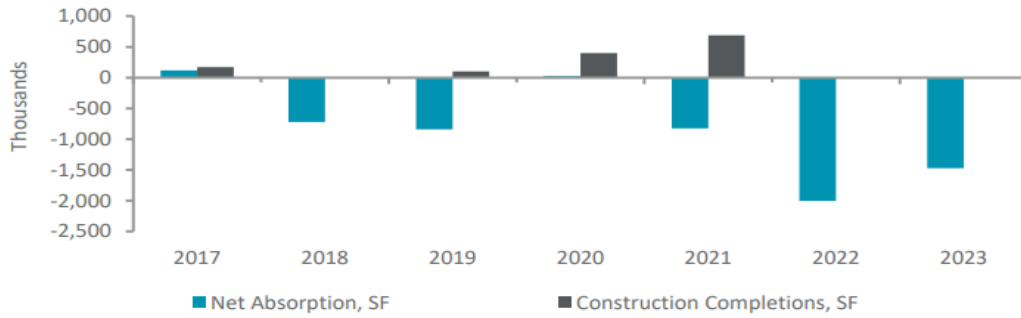
The combined Blue Bell, Plymouth Meeting, Fort Washington submarket contains approximately 11.7 million square feet of office space (19% of all of the office space in the suburban Philadelphia office market). This combined submarket currently has the highest overall office vacancy of all of the submarkets in the suburban Philadelphia office market. As of third-quarter 2023, these combined submarkets had a 26.8% overall office vacancy rate, compared to 21.7% in the region.

³ RentCafe, Market Insights, *From Boardrooms to Bedrooms: A Record 55K Office-to-Apartments Expected in Major Cities*, January 30, 2024

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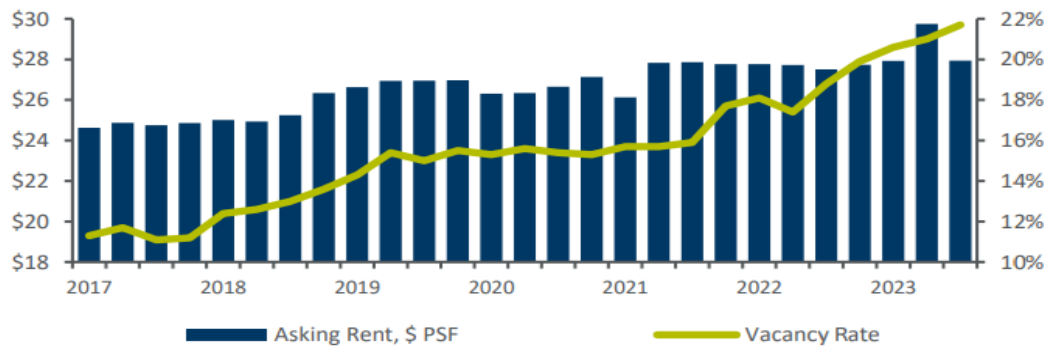
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Figure 23. Office Space Absorption and Construction Trends: Suburban Philadelphia



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

Figure 24. Overall Office Vacancy and Asking Rent Trends: Philadelphia MSA



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

Figure 25. Office Development Pipeline: Montgomery County, 3Q 2023

Project Name	Municipality	State	Total Sq. Ft.	Construction Phase
650 Park Avenue	Upper Merion	PA	100,780	Holding

Source: Montgomery County Planning Commission, Quarterly Construction Report, 3Q, 2023

Figure 26. Suburban Philadelphia Office Market Statistics, 3Q 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
Blue Bell/Ply. Mtg./Ft. Wash.	26.8%	11,737,868	-354,241	296,256	-	\$25.79	\$28.15
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.

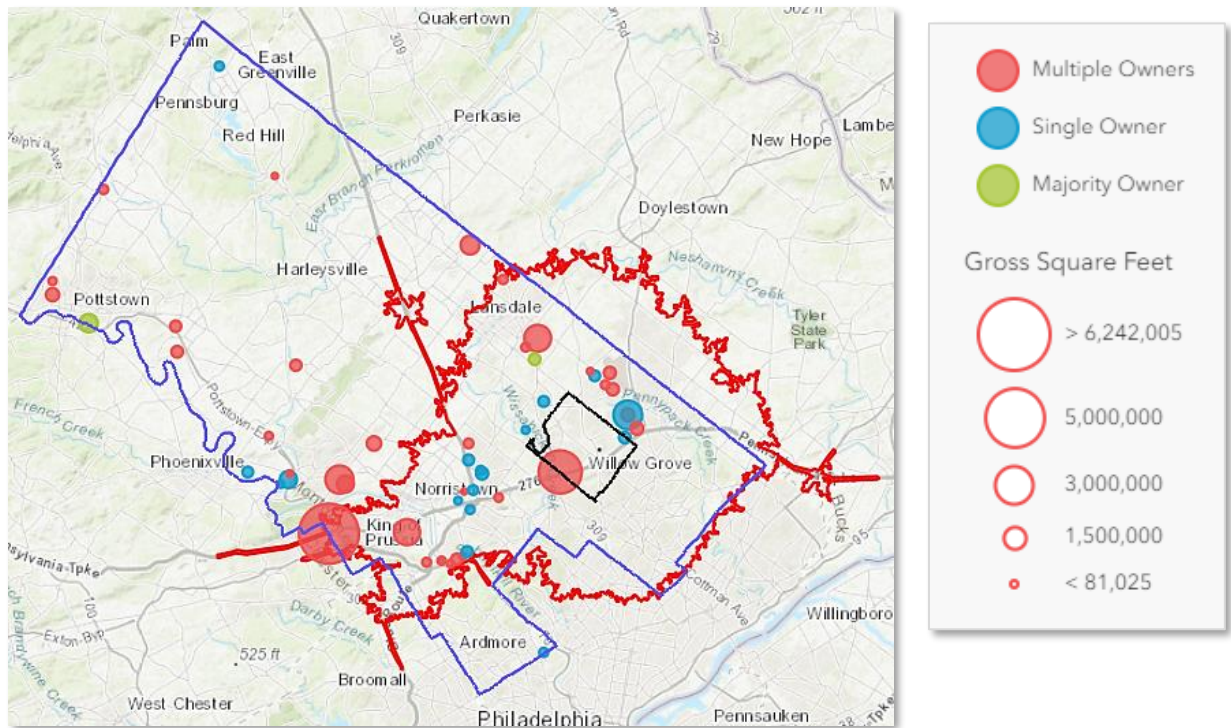
Source: Cushman & Wakefield, Philadelphia Marketbeat, Office, Q3 2023

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Business Parks

Located at the crossroads of the PA Turnpike and PA Route 309, the 536-acre Fort Washington Office Park is the only business park located in the township (includes those with at least 75,000 gross square feet of office, industrial, or flex space). According to discussions with two local brokers and data provided by Costar, Fort Washington Office Park’s vacancy rate (14%) is relatively healthy compared to the regional office market. Furthermore, the business park’s vacancy rates are concentrated in a few large buildings and, therefore, are skewing the total vacancy rate, as many smaller buildings are full or relatively so. Interviews with local brokers suggest the Fort Washington Office Park is healthy based on the demand for smaller office footprints.

Figure 27. Business Parks: Montgomery County



Source: Montgomery County Planning Commission, 2023 Business Park Inventory, Esri

Figure 28. Upper Dublin Township Office Space

	Total Square Footage	Available for Lease	Availability Rate	Total Vacancy Rate
Upper Dublin Township	4,850,000	439,000	9.1%	11.3%
Fort Washington Office Park*	2,950,000	439,000	NA	14.0%

Note: Fort Washington Office Park office space is a subset of total office space in Upper Dublin Township
 Source: Costar, data as of August 1, 2024.

Retail

Methodology

Upper Dublin is located in the Montgomery County retail submarket. To better understand potential retail demand in the township, 4ward Planning analyzed key retail metrics (e.g., inventory, absorption, vacancy, asking rents) based on fourth-quarter 2023 data provided by CBRE. Data is presented for the larger Philadelphia MSA retail market and Montgomery County retail submarket. Pending commercial development projects for the county are based on a third-quarter 2023 construction report published by the Montgomery County Planning Commission. For inclusion in this report, a development must have at least 30,000 square feet of nonresidential uses. 4ward Planning mapped shopping centers in Montgomery County and identified retail metrics for the township’s three neighborhood shopping centers, based on data provided by the Montgomery County Planning Commission and BET Investments Inc. According to the Montgomery County Planning Commission, a neighborhood shopping center has between 30,000 and 150,000 square feet and typically includes supermarkets and small tenants.

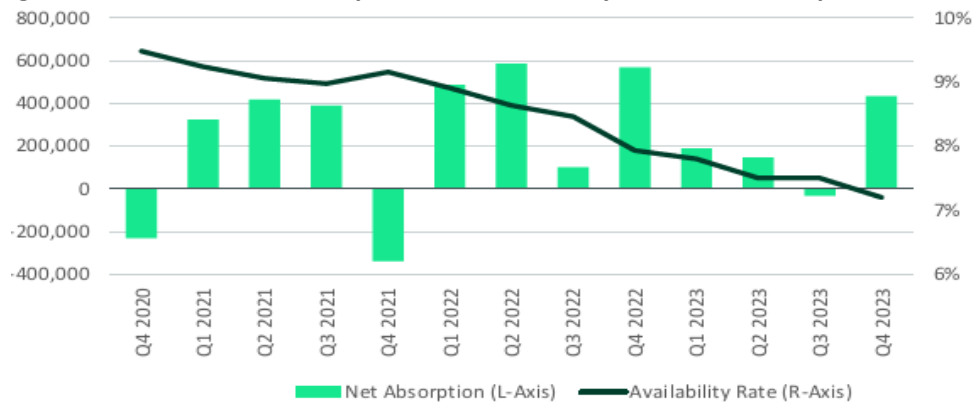
Retail Trends

Philadelphia Retail Market

The Philadelphia MSA’s retail market has been slowly rebounding since the Covid-19 pandemic and has seen positive year-to-date net absorption of retail space.

According to fourth-quarter 2023 data provided by CBRE, a commercial real estate services and investment firm, there is approximately 127.7 million square feet of retail space in the Philadelphia MSA. Overall, the MSA has seen positive year-to-date net absorption of retail space (736,343 square feet), largely driven by newly opened restaurants and experiential retailers in Philadelphia Center City as well as holiday shopping and tourism, which has been slowly rebounding since the Covid-19 pandemic, when hotels and restaurants were heavily impacted by pandemic-related restrictions.

Figure 29. Retail Net Absorption and Availability Trends: Philadelphia MSA



Source: CBRE, Philadelphia Retail, Q4 2023

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Montgomery County Retail Market

With a quarter of the nine-county Philadelphia MSA’s retail square feet located in Montgomery County (31.4 million), the county is a major retail hub in the metro area. While the county, however, has seen negative year-to-date net absorption of retail space (-197,805 square feet), it has a relatively low availability rate⁴ (6.2%) compared to the MSA (7.2%) and relatively high asking retail rents (\$21.13) compared to the MSA (\$19.32) - suggesting the county’s retail market is relatively strong in terms of occupancy and demand. With just 9% of MSA retail space under construction in the county, there will be little new retail space coming on the market in Montgomery County.

Figure 30. Retail Market Characteristics: Philadelphia MSA, Q4 2023

County (State)	Inventory (SF)	Availability Rate (%)	In-Line Asking Rents (NNN)	YTD Net Absorption	Under Construction (SF)
Bucks County (PA)	20,543,833	4.4	\$27.75	280,308	155,000
Chester County (PA)	9,727,835	7.9	\$17.58	81,634	0
Delaware County (PA)	9,841,647	6.0	\$15.44	126,510	78,000
Montgomery County (PA)	31,404,707	6.2	\$21.13	-197,805	35,000
Burlington County (NJ)	11,295,188	6.2	\$17.57	83,947	0
Camden County (NJ)	10,606,469	7.1	\$11.67	482,595	0
Gloucester County (NJ)	7,925,604	9.5	\$17.96	162,206	0
Mercer County (NJ)	10,875,836	8.4	\$16.86	-201,450	167,204
New Castle (DE)	15,478,648	9.9	\$22.95	-81,602	188,579
Bucks County (PA)	20,543,833	4.4	\$27.75	280,308	155,000
Chester County (PA)	9,727,835	7.9	\$17.58	81,634	0
Philadelphia MSA	127,699,767	7.2	\$19.32	736,343	623,783

Source: CBRE, Philadelphia Retail, Q1 2023

Figure 31. Commercial Development Pipeline: Montgomery County, 3Q 2023

Project Name	Municipality	State	Total Sq. Ft.	Construction Phase	20-Minute PMA
Scott KIA	Limerick	PA	32,455	Construction	
Mainland Pointe	Lower Salford	PA	64,800	Construction	
Self-Storage Facility	Upper Dublin	PA	118,094	Construction	X
Limerick Plaza	Limerick	PA	96,455	Land Prep.	
Town Center at Souderton	Souderton	PA	60,000	Land Prep.	X

Note: For inclusion in this report, a development must have at least 30,000 square feet of nonresidential uses.
Source: Montgomery County Planning Commission, Quarterly Construction Report, 3Q, 2023

⁴ An availability rate is the ratio of available space, which is calculated by dividing the total square feet available by the total rentable square feet.

Local Shopping Centers

Potential near-term redevelopment opportunity for older shopping centers.

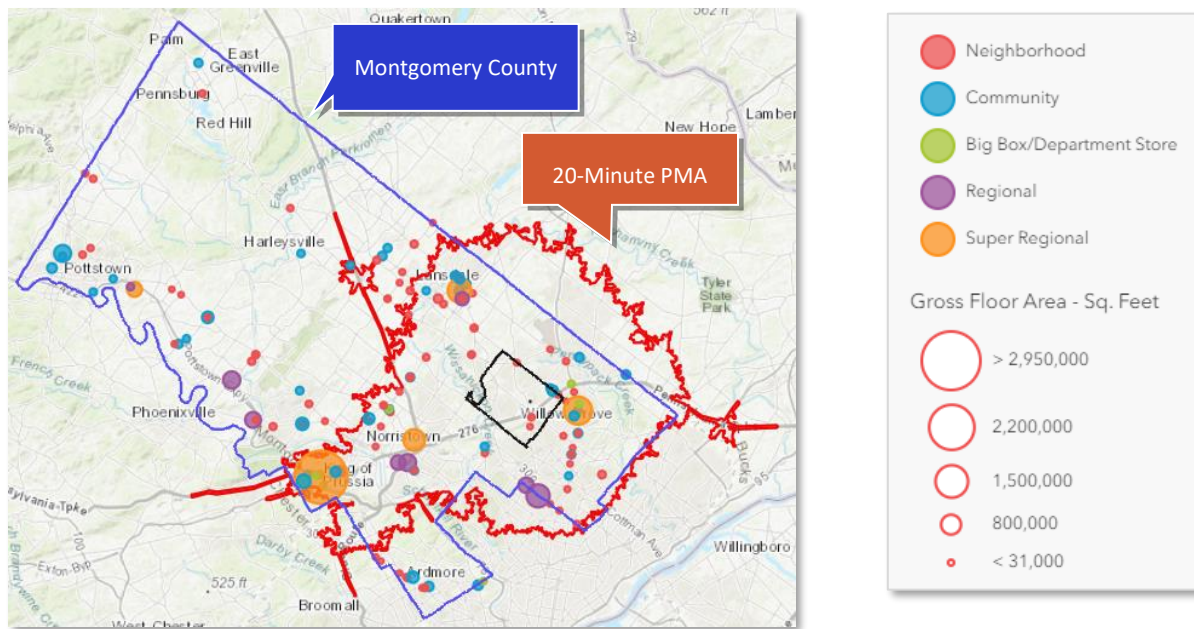
According to data provided by the Montgomery County Planning Commission and BET Investments Inc., (a national real estate investor and developer) there is 289,975 square feet of existing neighborhood shopping center space in Upper Dublin Township (within three centers: Dreshertown Plaza Shopping Center, Fairway Shopping Center, and Maple Glen Shopping Center) and 148,326 square feet of community shopping center space recently completed at the Promenade at Upper Dublin lifestyle center. The ages of the Dreshertown Plaza, and Fairway and Maple Glen Shopping Centers (47, 69, and 55 years, respectively) suggest the sites could be near-term redevelopment candidates, whereby housing (e.g., multi-family units) is created as part of an entire shopping center site redevelopment including anchor grocers, restaurants, and personal service shops - similar to the Promenade at Upper Dublin.

Figure 32. Neighborhood Shopping Centers: Upper Dublin Township

Name	Type of Center	Major Tenants/ Anchors	Number of Stores	Gross Floor Area (Sq. Feet)	Site Acres	Year Built
Dreshertown Plaza	Neighborhood	George's Market at Dreshertown	29	96,755	10.2	1977
Fairway	Neighborhood	Acme Markets	9	41,220	3.9	1955
Maple Glen	Neighborhood	Giant Food	15	62,000	6.9	1969
Promenade at Upper Dublin	Community	Sprouts Farmers Market	39	148,326	23.9	2020

Source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals, BET Investments Inc.

Figure 33. Shopping Centers: Montgomery County



Source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals, Esri

Residential

Methodology

Residential Real Estate Trends

Using a variety of public and private data sources, 4ward Planning analyzed residential real estate trends across selected base and market study areas. Esri data is presented for key housing inventory metrics such as housing age, housing structure by type, housing tenure, median home values, and median gross rent. Housing permit trends (1980 to 2022) by building type are based on the Census Bureau's Building Permits Survey. Housing development pipeline data for the county is based on a third-quarter 2023 report published by the Montgomery County Planning Commission. For inclusion in this report, a development must have at least 50 housing units. Detailed vacancy rates by tenure type are based on the Census Bureau's American Community Survey (ACS) 2022 five-year estimates (the most recent year available). Affordable housing income limits by family size are based on fiscal year 2023 data provided by the U.S. Department of Housing and Urban Development (HUD) for Montgomery County. Affordable monthly rent or mortgage payment estimates are calculated by 4ward Planning and assume 30% of a household's monthly income. Median home sale prices by housing type are based on 2022 data provided by the Montgomery County Planning Commission.

Residential Supply/Demand Analysis

Unmet housing demand estimates are projected out ten years and are presented as residential units (inclusive of affordable units) prospectively captured within the Township over a ten-year period.

Household Demand: Residential supply and demand projections assume near-term annual household and housing unit growth projections provided by Esri for the 20-minute PMA. By 2028, Esri projects that the number of households in the PMA will increase by 4,044 (0.3% per year) and the number of housing units in the PMA will increase by 4,340 over the next five years (0.3% per year).

Natural Vacancy and Obsolescence: Residential supply and demand projections assume near-term projected vacancy rates provided by Esri for the PMA. Esri projects that the housing vacancy rate in the PMA will be 5.6% by 2028. 4ward Planning assumes that the township will maintain a natural average annual housing vacancy rate of 3.0%, allowing for housing turnover. The remaining vacant housing within the PMA (2.6%) is vacant due to physical obsolescence or seasonal, recreational, or occasional use. 4ward Planning assumes that a small portion (1.0%) of the remaining housing stock becomes obsolete annually.

Commuting Workers: According to 2021 primary job data provided by the U.S. Census Bureau, currently, 71% of primary workers commute from outside the PMA. In order to calculate pent-up housing demand from commuting workers, 4ward Planning projected primary job workers within the PMA based on 2021 primary worker data provided by the U.S. Census Bureau and average 2020 to 2030 industry employment growth rate projections provided by the Pennsylvania Department of Labor and Industry for Montgomery County. 4ward Planning assumes that that 5% of PMA workers would trade their commute if adequate housing were available in the PMA. 4ward Planning conservatively assumes that between 3% and 5% of unmet housing demand from commuting primary workers in the PMA could be accommodated in the township.

Residential Trends

475 units have been permitted in the township since 2016.

Existing Housing Inventory

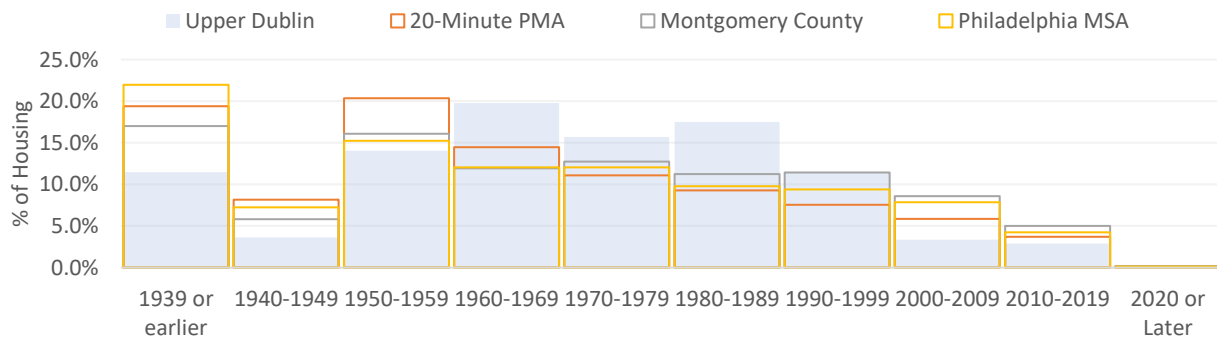
The township contains approximately 10,720 housing units, with the largest share of housing in the township built between 1960 and 1970 (20%) and 475 units permitted since 2016. Notably, the approximate 400 high-end apartments as part of the mixed-use Promenade at Upper Dublin project were recently constructed (includes studios, and one- and two-bedroom units). According to BET Investments, Inc., the apartments, which were built in two phases from late 2020 to early 2021, were 95% occupied and 97% leased by March 2022 (after 17 months). According to Apartments.com, studios are asking \$1,876, one-bedroom units are asking between \$2,519 and \$3,837, and two-bedroom units are asking between \$2,890 and \$5,932. According to third-quarter construction reports provided by the Montgomery County Planning Commission, there are 3,050 units in the development pipeline, with 1,306 of these units in the 20-minute PMA. The 310-unit J at Dresher (Jefferson) luxury apartment project (includes one-, two- and three-bedroom units) is currently under construction in the township.

Figure 34. Existing Housing Inventory

Metric (Year)	Upper Dublin Township	20-Minute PMA	Montgomery County	Philadelphia MSA
Total Housing Units (2023)	10,719	283,333	354,750	2,632,807
Median Year Structure Built (2021)	1971	1961	1969	1965

Source: Esri

Figure 35. Housing Units by Year Built, 2021

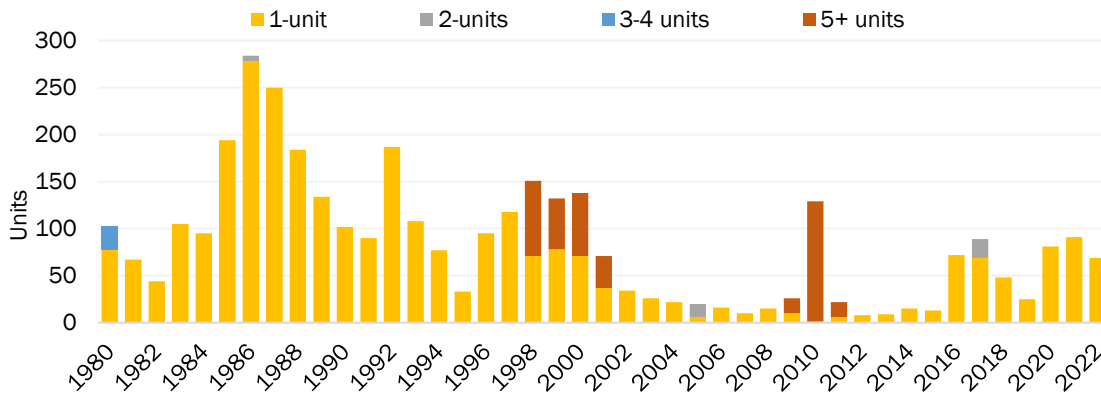


Source: Esri

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Figure 36. Housing Unit Permit Trends: Upper Dublin Township



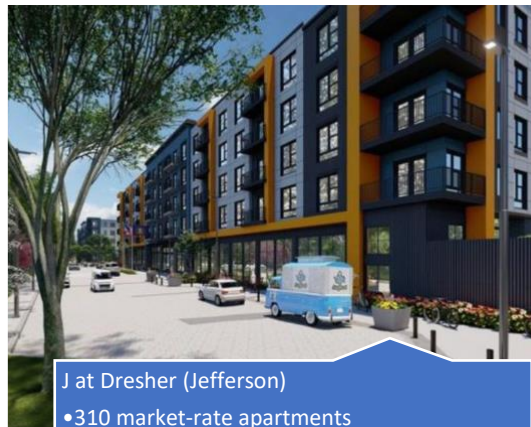
Source: Census Bureau's Building Permits Survey, SOCDS Building Permits Database

Figure 37. Residential Development Pipeline: Montgomery County, 3Q 2023

Project Name	Municipality	SFA Units	MF Units	Total Units	Construction Phase	20-Minute PMA	Mixed Use	Age Restrict. Dev.
400 Elm Street	Conshohocken	-	348	348	Construction	X		
Sanatoga Greene	Lower Pottsgrove	147	310	457	Construction		X	
J at Dresher (Jefferson)	Upper Dublin	-	310	310	Construction	X		
Arden Parkside at Providence Town Ctr	Upper Providence	-	586	586	Construction		X	
River Pointe	Bridgeport	338	272	610	Land Prep.	X	X	
Victorian Village II	Hatboro	-	52	52	Land Prep.	X		X
Coulter Place	Lower Merion	-	131	131	Land Prep.		X	
Arbor Place	Norristown	150	192	342	Land Prep.	X		
230 Fairhill Street	Upper Moreland	-	132	132	Land Prep.	X		
The Mayer	Lower Merion	-	80	80	Holding			
Total		635	2,413	3,048				

Note: For inclusion in this report a development must have at least 50 housing units.

Source: Montgomery County Planning Commission, Quarterly Construction Report, 3Q, 2023



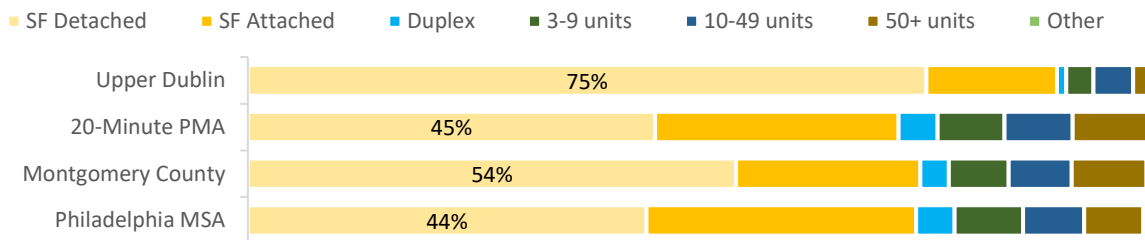
- J at Dresher (Jefferson)**
- 310 market-rate apartments
 - Clubroom and lounge, game area with billiards, shuffleboard, and pinball; poker room; leading-edge fitness center; resident movie theater; private dining room; and co-working area

Like much of Montgomery County, the township is suburban in nature with many owner-occupied, single-family homes. Promoting a greater diversity of housing could help create a more sustainable and inclusive community.

Housing Tenure and Type

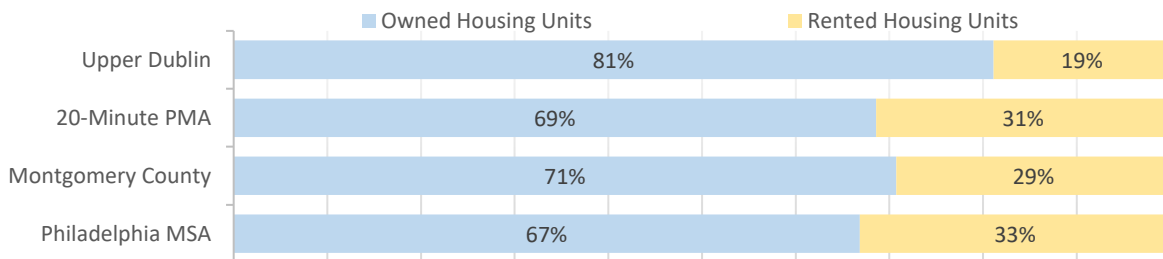
Compared to the PMA, the township is much more suburban in nature with just 810 housing units per square mile, compared to 1,230 units with the PMA. This is likely due to the township’s relatively large share of its housing owner-occupied (81%) and characteristic of single-family homes (75%). Just 19% of homes are renter-occupied. Varied housing types can cater to households with different housing needs, preferences, and life stages, and support sustainable development by promoting efficient land use and reducing urban sprawl, which can lead to more walkable neighborhoods. Our interviews with local real estate professionals suggest there is demand for more diversity of housing types in the township, including more townhome and single-floor living options.

Figure 38. Housing by Structure Type, 2021



Note: Single-family detached (SFD) represents housing units which stand alone on a lot and do not share any party walls. Single-family attached (SFA) represent housing units in which two or more units share a vertical party wall but have individual entries into the units, frequently with common open spaces.
 Source: Esri

Figure 39. Housing Units and Tenure, 2023



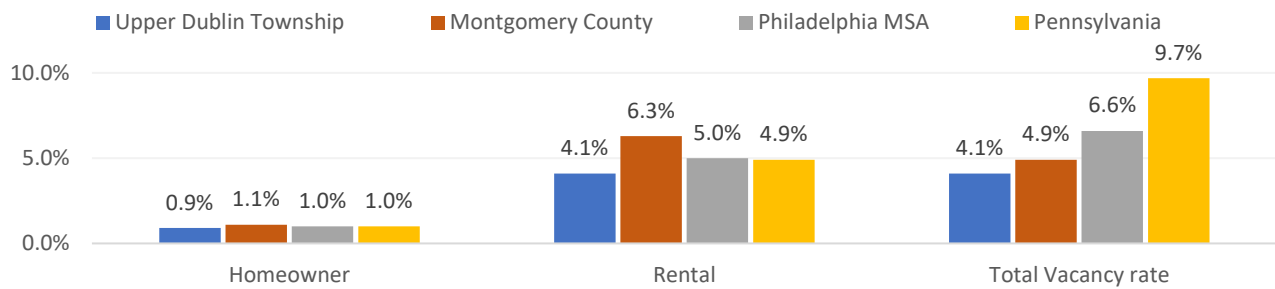
Source: Esri

Both the township’s owner and rental housing market are tight. The development of new housing could help alleviate the tight market.

Housing Vacancy

Vacancies can occur naturally as properties are put up for sale or rent or undergo turnover between occupants. Typically, homeowners have a greater financial commitment to a property, leading to lower turnover and natural vacancy rates among ownership units. Conversely, renting offers more flexibility than homeownership, leading to higher turnover and vacancy rates among rental units. In 2022, the vacancy rate among ownership units in the township (0.9%) was tight and lower than that in the county (1.1%). However, the vacancy rate among rental units (4.1%) was lower than that in the county (6.3%), suggesting the township has a relatively tight ownership and rental housing market, an assessment confirmed by interviews with local real estate professionals and resident feedback during focus group meetings.

Figure 40. Detailed Vacancy Rates by Housing Tenure, 2022



Source: U.S. Census Bureau, American Community Survey 5-Year Estimates; Award Planning Inc., 2024

Housing Costs

The median home value in the township (\$481,854) is relatively affordable, given the township’s median household income (\$155,407). For example, the township’s median home value is equivalent to 3.1 times its median annual household income. For comparison purposes, the national median home value has been around five times the national annual median household income. While 23% of owner-occupied households pay more than 30% of their incomes on housing (considered housing cost-burdened by the U.S. Department of Housing and Urban Development (HUD)), it is a share less than that in the MSA (27%).

Conversely, in 2021, 42% of all renter households in the township spent more than 30% of their monthly incomes on gross rent. The estimated median gross rent (contract rent plus the estimated average monthly cost of utilities) in the township is approximately \$1,730 per month, which may be out of reach for many low-income households. In 2023, a two-person household in Montgomery County with an income of \$44,650 would qualify as a very low-income household (50% of AMI), and a two-person household with an income of \$71,400 would qualify as a low-income household (80% of AMI). Assuming a household can afford 30% of its monthly income on housing, an affordable gross rent or mortgage

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payment would be \$1,120 per month for a two-person very low-income household and \$1,790 per month for a two-person low-income household.

Figure 41. Housing Cost 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

Figure 42. Affordable Income Limits and Monthly Housing Costs: Montgomery County, 2023

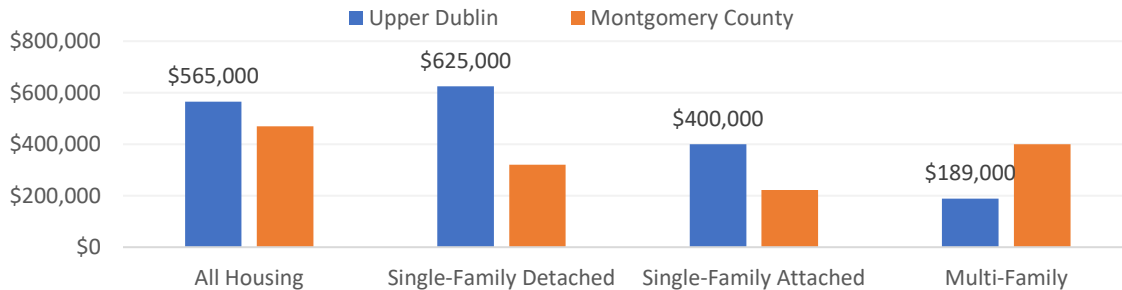
	Family Size			
	1	2	3	4
HUD Income Limits by Persons in Family				
Extremely Low (30%)	\$23,450	\$26,800	\$30,150	\$33,500
Very Low (50%)	\$39,100	\$44,650	\$50,250	\$55,800
Low (80%)	\$62,500	\$71,400	\$80,350	\$89,250
Affordable Monthly Rent/Mortgage Payment (30% of Monthly Income)				
Extremely Low (30%)	\$590	\$670	\$750	\$840
Very Low (50%)	\$980	\$1,120	\$1,260	\$1,400
Low (80%)	\$1,560	\$1,790	\$2,010	\$2,230

Source: HUD, FY 2023 HOME Income Limits effective date is June 15, 2023, Montgomery, PA MSA

Home Sales

According to housing sales data provided by the Montgomery County Planning Commission, Upper Dublin Township had a median sales price of \$565,000, with this sales price highest among single-family detached homes (\$625,000) and lowest among multi-family properties (\$189,000). From 2021 to 2022, the median sales price in the township increased by \$50,000 (or by 9.7%), suggesting there is significant demand for housing in the township. Despite an increase of interest rates over the course of 2022, housing demand continued to be strong in both the township and county, which was confirmed by interviews with local real estate professionals.

Figure 43. Median Sales Prices, 2022



Source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals, 2022 Median Prices for Housing

Residential Supply/Demand Analysis

In addition to units in the development pipeline, Upper Dublin Township has the potential to support between 844 and 1,407 additional housing units by 2028.

Largely due to existing pent-up demand from primary workers who commute into the township, by 2028, there will be an estimated net demand for approximately 14,070 residential units in the PMA. If buildable residential land were available in the township, 4ward Planning conservatively assumes that the township could have an opportunity to capture between 6% and 10% of pent-up residential demand in the PMA, equivalent to between approximately 844 and 1,407 units by 2028.

Figure 44. Township Net Dwelling Unit Demand Through 2028

	2023	2028
Housing Demand Metrics		
Estimated Households in 20-Minute PMA (0.3% growth rate)	267,608	271,652
Estimated Primary Workers in 20-Minute PMA (0.9% growth rate)	370,550	387,530
Estimated Primary Workers Residing Outside 20-Minute PMA (71%)	262,830	274,490
Estimated Pent-Up Housing Unit Demand from Commuting Area Workers (5%)	13,142	13,720
Estimated Number of Naturally Occurring Vacant Housing Units (3%)	8,500	8,630
Estimated Aggregate Housing Unit Demand in 20-Minute PMA	289,249	294,002
Housing Supply Metrics		
Estimated Housing Units in 20-Minute PMA	283,330	287,670
Physically Obsolescent Units (2.6% of total units, 1% annual obsolescence rate)	7,367	7,740
New Units Added in 20-Minute PMA (0.3% growth rate)		4,340
Estimated Net Marketable Housing Units in 20-Minute PMA	275,963	279,930
Net Housing Demand/Supply Calculation		
Estimated Aggregate Housing Unit Demand in 20-Minute PMA	289,249	294,002
Subtract Estimated Net Marketable Housing Units in 20-Minute PMA	275,963	279,930
Net Housing Unit Demand/(Excess Units)	13,286	14,072
Township Unit Capture (6%)	797	844
Township Unit Capture (10%)	1,329	1,407

Source: 4ward Planning, Inc.

National Trends

The nation’s build-to-rent (BTR) sector has experienced significant growth in recent years, driven by factors such as changing demographics, lifestyle preferences, and a shortage of affordable housing options for renters.

Build-to-Rent Market

According to CBRE Research, build-to-rent (BTR) developments are new residential communities that have the characteristics of single-family homes (no residents living above or below) but built for renters desiring features not typically offered with multi-family properties. Most BTR properties consist of 50 or more homes or townhomes, typically between six to 12 dwelling units (DUs) per acre. BTR properties are owned by a single entity and are professionally managed. BTR communities are typically located in less dense suburban or exurban locations within a one-hour commute of an urban center. While many BTR properties offer some community amenities like walking trails, green spaces, and dog parks, some also offer more significant amenities like swimming pools, clubhouses, and gate access.

The BTR sector has experienced significant growth in recent years, driven by factors such as changing demographics, lifestyle preferences, and a shortage of affordable housing options for renters. Multiple factors create compelling fundamentals for driving rent growth: including a national housing shortage, a surge of millennials creating families and outgrowing traditional apartments, baby boomers downsizing (with some choosing the flexibility and low-maintenance lifestyle of renting), an increased housing demand in suburbs and exurbs accelerated by Covid remote work trends, and a limited BTR supply, exacerbated by a constrained construction lending environment and entitlement challenges in many locations.

Figure 45. BTR Product Groupings

Product Type	Product Description	Typical Home Size Range		Typical Density (DUs/acre)
		Smaller	Larger	
Horizontal Multi-Family	Small single-family detached and attached homes	650 SF 1 Bed/1 Bath	1,400 SF 3 Bed/2 Bath	12
Two-Story Townhomes	Homes in two- to seven-unit building configurations	1,300 SF 2 Bed/2 Bath	1350 SF 4 Bed/2.5 Bath	10
Cottages	Detached or attached single-family homes on smaller lots	1,300 SF 2 Bed/2 Bath	1,750 SF 4 Bed/2.5 Bath	10
Traditional Single-Family	Detached homes on traditional lots	1,400 SF 3 Bed/2 Bath	2,000 SF 4 Bed/3 Bath	8
Luxury Single-Family	Detached and attached homes on individual lots	2,000 SF 3 Bed/2 Bath	2,800 SF 4 Bed/3.5 Bath	6

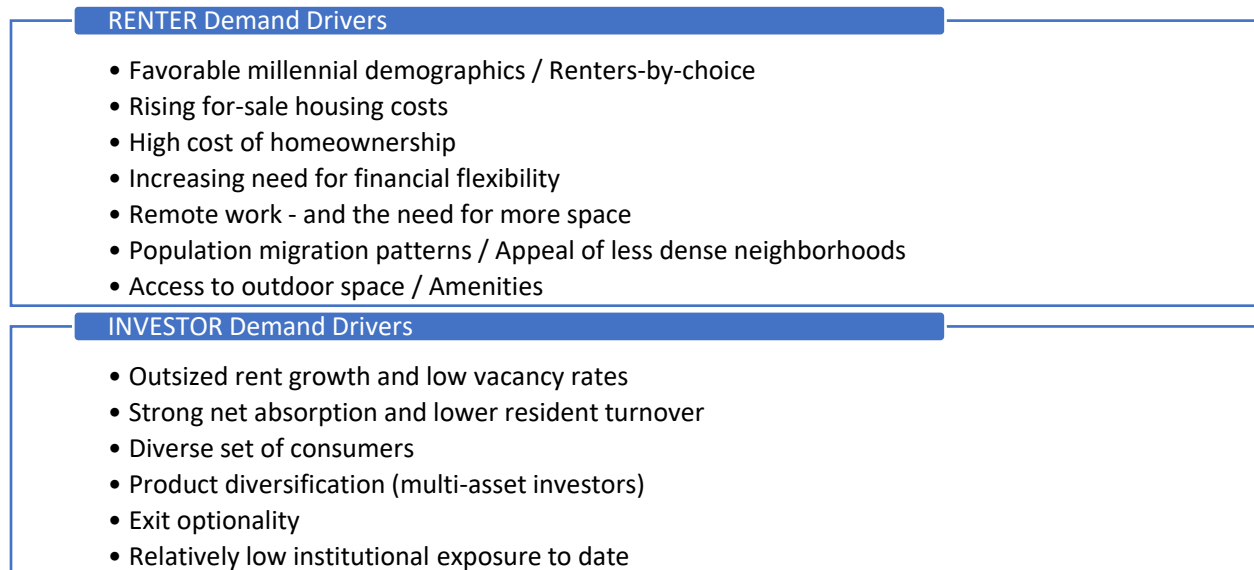
Source: CBRE Research, Build-to-Rent (BTR) Overview, Intelligent Investment, June 2023

Figure 46. BTR Subcategories



Source: CBRE Research, *Build-to-Rent (BTR) Overview, Intelligent Investment, June 2023*

Figure 47. BTR Demand Drivers



Senior Housing

Methodology

Background data and key performance indicators for the *Active Adult* senior housing product is provided by Berkadia, a national provider of senior housing data. Background data and market metrics for the *Traditional* senior housing product is provided by the National Investment Center for Seniors Housing & Care (NIC), the traditional senior housing market (composed of majority independent living, assisted living, or nursing care facilities). In identifying existing senior housing supply, the number of age-restricted housing communities and independent living units in Continuing Care Retirement Communities (inventory does not include assisted living or nursing care units/beds) in the PMA was mapped, based on data provided by the Montgomery County Planning Commission. To better understand near-term senior housing demand drivers in the PMA, key metrics were identified based on estimates and projections provided by Esri. These metrics include projected near-term population growth among persons 55 years and older, median household incomes by age of householders 55 years and older, homeownership rates among senior households.

Senior Housing Trends

Senior Housing Types

Senior housing services can evolve across different senior housing products, including both single-family and multi-family housing products. For example, active adult properties or communities are essentially age-qualified housing (owner or renter) that offers some activities or socialization programs, while independent living housing offers additional services such as transportation, laundry, and meals. Continuing Care Retirement Communities, also known as Life Plan Communities, are facilities which typically offer a variety of independent living arrangements for residents, together with medical and nursing services, full central dining accommodations, and educational, recreational, and social activities for those who wish to partake of them. Active adult senior housing is a relatively new product, while traditional senior housing is composed of majority independent living, assisted living, or nursing care facilities.

Assisted living facilities and nursing homes often raise concerns about high cost, quality of care, and loss of autonomy while independent living communities generally have a more positive perception, offering autonomy and social engagement. The Covid-19 pandemic prompted individuals to reevaluate their long-term care plans and preferences in light of the risks associated with traditional senior housing facilities. Overall, the negative perceptions of traditional senior housing facilities have led many younger baby boomers to choose more independent housing options (e.g., active adult or independent living) or prioritize aging in place in order to avoid the financial and care-related challenges associated with institutionalized housing options. Age-restricted communities will likely evolve to offer a wider range of options, home modifications, and integrated healthcare services to meet the diverse needs and preferences of aging baby boomers desiring to age in place.

Figure 48. Senior Housing Evolution of Services

	Shelter	Activities/ Recreation	Social- ization	Transport/ Laundry	Meals Included	ADL Services*	Specialized Memory Care	Short-Term Post-Acute Care	Long-Term Chronic Care
Conv. Housing	X								
Active Adult	X	X	X						
Independent Living	X	X	X	X	X				
Assisted Living	X	X	X	X	X	X	X		
Memory Care	X	X	X	X	X	X	X		
Skilled Nursing	X	X	X	X	X	X	X	X	X

*ADL (activities of daily living) services include medication management and assistance with bathing, dressing, and mobility.
 Source: Berkadia, Seniors Housing Active Adult, 2022 Report; Active Adult Rental Properties, Defining the Emerging Property Type, October 2022

National Trends

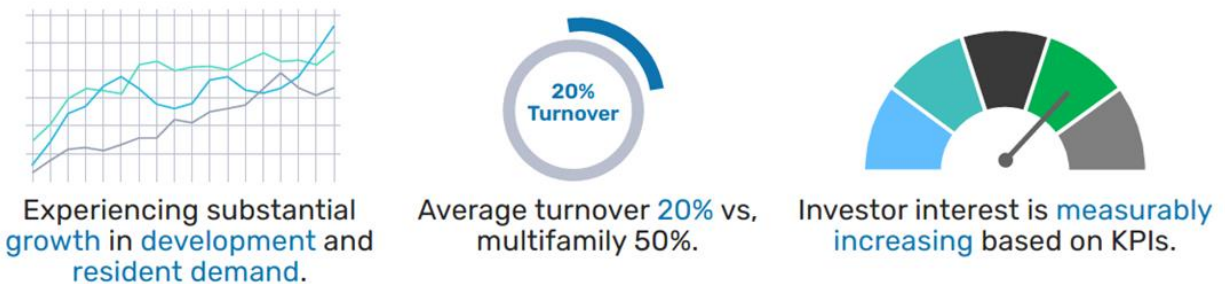
While the traditional senior housing market was profoundly impacted by the Covid-19 pandemic, the relatively new active adult senior housing product has been booming in recent years, largely due to the sizable baby boomer population that is aging yet remaining physically active. Active adult facilities typically command rent premiums and provide higher-end amenities, which are attractive to developers.

Active Adult

A 2022 report published by Berkadia, a national provider of senior housing data, indicates the market for active adult rental properties has enormous potential, due to several factors including a large and immediate demand pool (i.e., the aging baby boomer population), no required healthcare licensure, less operational intensity than senior housing, potential rent premium compared to conventional multi-family properties, and typically longer length of stay than that of senior housing residents or younger multi-family residents.

- On average, active adult residents rent for six to nine years, with 80% retention in stabilized properties - making the active adult segment very attractive to risk-averse investors and developers once the properties stabilize.
- Active adult property rent rates are typically 10% to 30% higher than comparable multi-family in a given area, and anywhere from 30% to 50% lower than independent living properties in the market, depending on the level of luxury amenities offered.
- Active adult residents will pay a rent premium over conventional multi-family housing to live with their peers in a setting with a distinct lifestyle or culture but desire lower rents than independent living facilities.

Figure 49. Action Adult Key Performance Indicators



Source: Berkadia, Seniors Housing Active Adult, 2022 Report

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Traditional Senior Housing

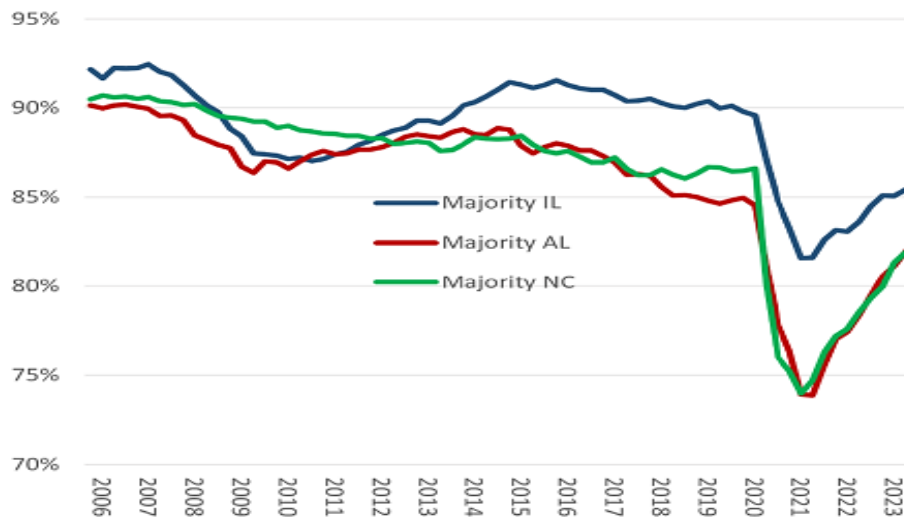
According to data provided by the National Investment Center for Seniors Housing & Care (NIC), the traditional senior housing market (composed of majority independent living, assisted living, or nursing care facilities) was profoundly impacted by the Covid-19 pandemic but has been recovering at a steady pace, especially among majority independent living facilities. Throughout the end of 2022 and into the first half of 2023, the senior housing market is seeing two divergent trends: occupancy rates continue to recover while new supply eases, but the higher inflation environment has created an additional headwind through rising expenses and interest rate risk. According to data provided by NIC, independent living properties’ average occupancy grew by 70 basis points to 86.1% in third-quarter 2023.

Figure 50. Senior Housing Market Fundamentals, 3Q23

	Seniors Housing		Nursing Care
	Majority Independent Living	Majority Assisted Living	Majority Nursing Care
Occupancy	86.1%	82.6%	82.4%
Annual Rent Growth	4.8%	6.1%	4.5%
Annual Absorption	3.2%	5.6%	2.8%
Construction vs. Inventory	4.6%	4.7%	0.2%
Annual Inventory Growth	1.2%	1.5%	-1.0%
Rolling 4-Quarter Starts vs. Inventory	1.6%	1.6%	0.0%

Source: NIC, Seniors Housing Market Fundamentals Insights, 3Q23

Figure 51. Traditional Senior Housing Occupancy Trends



Source: NIC, Seniors Housing Market Fundamentals Insights, 3Q23

Local Inventory

Age-restricted housing communities and independent living units represent 7% of all units in Upper Dublin Township (compared to just 3% of all housing units in the PMA). The 114-unit Enclave at the Promenade 55-plus retirement community has recently been constructed.

According to data provided by the Montgomery County Planning Commission, there are 128 age-restricted housing communities and independent living units in Continuing Care Retirement Communities in the county (inventory does not include assisted living or nursing care units/beds). These communities provide approximately 20,230 units, representing 6% of all housing units in the county. Approximately 43% of total units in the county (8,700 units) are in the 20-minute PMA (representing 3% of all units in the PMA), and 4% (750 units) are in Upper Dublin Township (representing 7% of all units in the township). The 114-unit Enclave at the Promenade 55-plus active adult community is a recently constructed age-restricted community.

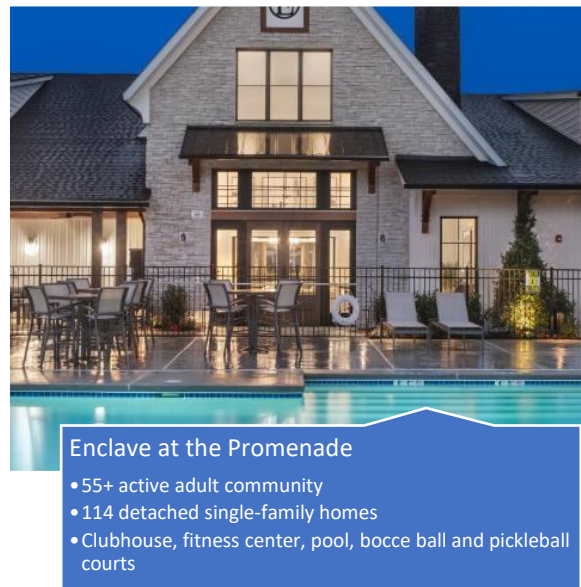


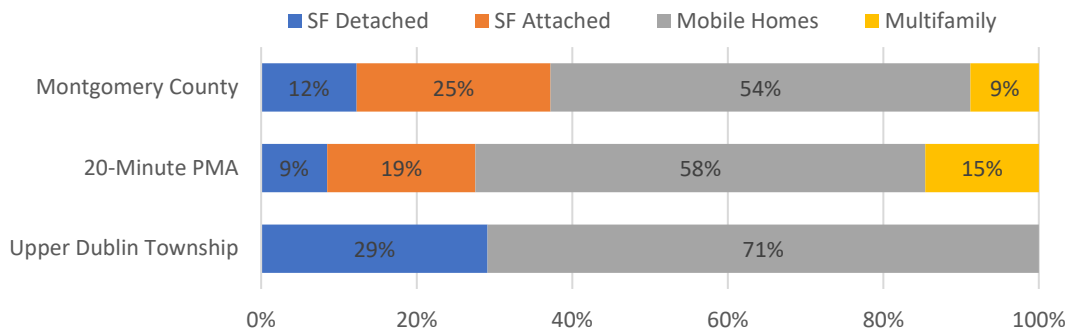
Figure 52. Age-Restricted Housing Summary: Montgomery County

Location	Age-Restricted by Type				Total Age-Restricted	Share of Total Housing Units
	SF Detached	SF Attached	Mobile Homes	Multifamily		
Upper Dublin Twp.	219	-	533	0	752	7%
20-Minute PMA	740	1,658	5,032	1,270	8,700	3%
Montgomery County	2,484	5,047	10,922	1,778	20,231	6%

Source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals

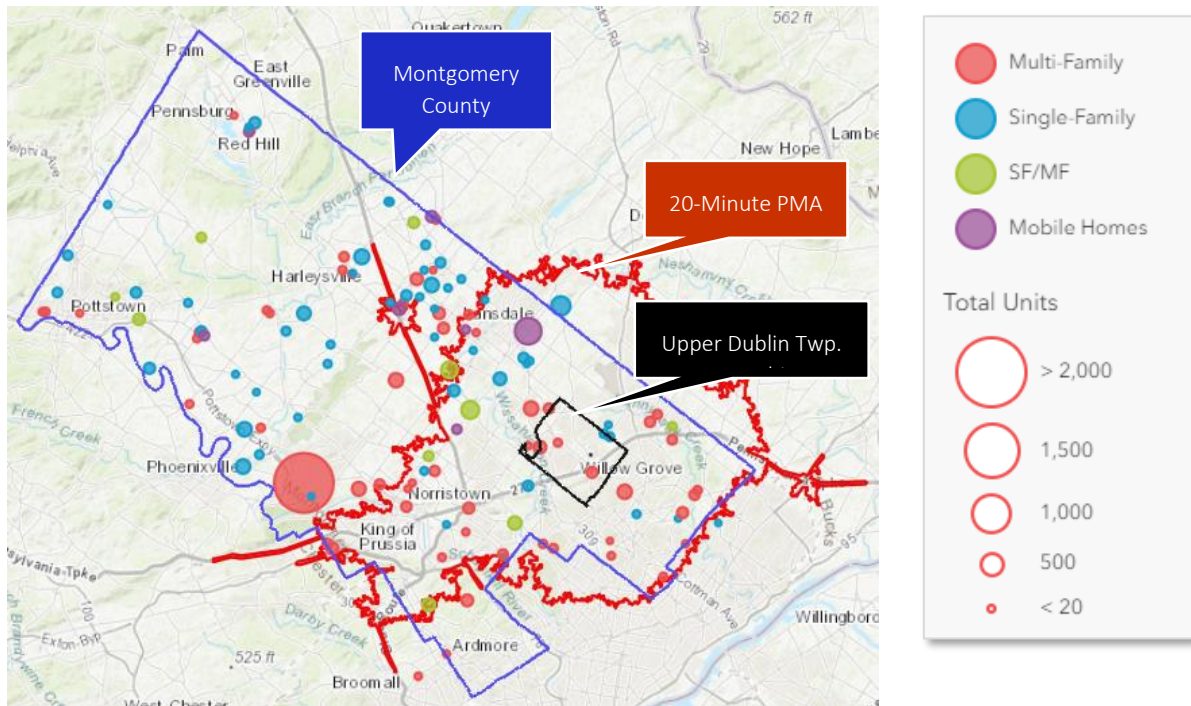
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Figure 53. Comparison of Age-Restricted Housing Type by Geography



Source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals

Figure 54. Age-Restricted Housing Map



Source: Montgomery County Planning Commission, Montgomery County Board of Assessment Appeals

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Figure 56. Age-Restricted Housing in 20-Minute PMA

Development Name	Municipality	Total Units	SFD	SFA	MF	MH	Year Built
Rydal Park	Abington	322			322		1975
Redeemer Village	Abington	200			200		1972
Rydal Waters	Abington	83	43	40			2020
Mission Green Condos	Abington	61			61		2014
Walnut Hill	Abington	28	14	14			2005 - 2007
Ambler Manor	Ambler	60			60		2001
Samuel A. Green House	Cheltenham	84			84		2011
Parkview at Ashbourne	Cheltenham	75			75		2006
Wyncote Church Home	Cheltenham	25			25		1992
Marshall Lee Towers	Conshohocken	80			80		1972
Brightview	East Norriton	171			171		2008
Stuart's Keep	East Norriton	153		54	99		1999-2002
Jefferson Crossing	East Norriton	84		84			2006-2009
Victorian Village at Loller Academy	Hatboro	168			168		2008
Moreland Towers	Hatboro	138			138		1977
Hidden Meadows	Hatfield Twp.	36		36			2004-2005
Regency at Waterside	Horsham	496	311	185			2022 to Present
Carriage House Manor	Horsham	42		42			1998
Elm Terrace Gardens	Lansdale	135			135		1981
North Penn Commons	Lansdale	60			60		2016
Spring House Estates	Lower Gwynedd	323			323		1974
Foulkeways at Gwynedd	Lower Gwynedd	264	11	253			1960
Gwynedd Estates	Lower Gwynedd	165			165		1976
Gloria Dei Towers	Lower Moreland	175			175		1974
Gloria Dei Manor Court	Lower Moreland	110			110		1978
Salford Mill	Lower Salford	40		40			2000-2001
The Village of Neshaminy Falls	Montgomery	776				776	1979-2001
Montgomery Walk	Montgomery	174		174			2009-present
Montgomery Knoll	Montgomery	76	76				2014-2018
Meadows at Parkview	Montgomery	42	26	16			2020-2021
Sandy Hill Terrace	Norristown	176			176		1980
Elon at Montgomery Park	Norristown	50			50		2018-2021
Rittenhouse School	Norristown	48			48		1996
Pinnacle at Plymouth Meeting	Plymouth	197			197		2020
Sherwood Reserve	Plymouth	44		44			2006-2009
Springfield Residence	Springfield	119			119		1975
Bethlehem Retirement Village	Springfield	100			100		1984
Squires Ridge	Springfield	33	5	28			2020-2021
Walnut Meadows	Towamencin	250				250	1995
501 at Mattison Estates	Upper Dublin	250			250		2022
Dublin Terrace	Upper Dublin	192			192		2010-2011
Enclave at the Promenade	Upper Dublin	114	114				2020-Present
Regency at Upper Dublin	Upper Dublin	105	105				2016 - 2021
Fort Washington Estates	Upper Dublin	91			91		1972
Gwynedd Woods	Upper Gwynedd	105				105	1995
Mill Run	Upper Gwynedd	48		48			2003
Canvas Valley Forge	Upper Merion	231			231		2017
Anthology of KOP	Upper Merion	158			158		2021
Gloria Dei Farms	Upper Moreland	143			143		1991
Maple Village	Upper Moreland	114		38	76		1996-2001
The Hill at Whitemarsh	Whitemarsh	286	26	80	180		2007
Masonic Village at Lafayette Hill	Whitemarsh	158			158		1976, 2015
Whitemarsh Senior Village	Whitemarsh	62			62		2015
Normandy Farms Estates	Whitpain	452	9	93	350		1983, 2000, 2019
Whitpain Farms	Whitpain	171		171			1984-1986
Blue Bell Springs	Whitpain	139				139	2001
Stony Creek Farms	Worcester	218		218			2008 - present

Senior Housing Demand

The near-term increase in PMA residents ages 65 and older should drive additional demand for senior housing, which could be captured in the township. Consideration should be given to marketing new units as “age-targeted” rather than “age-restricted,” in preparation for longer-term population shifts and changing demand.

While those ages 55 and older represent the potential target market for senior housing, the largest demand for active adult and independent living units is expected to come from residents ages 65 and older. The figure below compares the age distribution of people ages 55 and older in the 20-minute PMA across time. Largely due to the aging of the sizable baby boomer population (representing those currently between ages 59 and 77), the number of older adults (55-plus) living in the PMA has been increasing over the past two decades and is expected to continue in the near term. While those ages 55 and older represented just 29% of PMA residents in 2010, this segment will represent 36% of the PMA’s population by 2028. Near-term senior housing demand in the PMA will be significantly driven by those ages 65 and older, who largely represent the target market for senior housing (average age for active adult and independent living housing is 73 years and mid-80s, respectively). From 2023 to 2028, PMA residents ages 65 and older are projected to increase by 15,315 (an 11% increase).

Figure 57. 55-Plus Population Age Distribution: 20-Minute PMA

Age Cohort	Total Population				Population Change	
	2010	2020	2023	2028	2020-2023	2023-2028
55-64	81,903	95,170	92,775	84,252	-2,395	-8,523
65-74	50,694	73,496	79,299	82,862	5,803	3,563
75+	52,083	58,553	65,731	77,483	7,178	11,752
Total 55+	184,680	227,219	237,805	244,597	10,586	6,792
Total 65+	102,777	132,049	145,030	160,345	12,981	15,315
Share of Total Pop 55+	29%	34%	35%	36%		
Total Pop. (All Ages)	633,651	668,869	675,230	678,513	6,361	3,283

Source: Esri

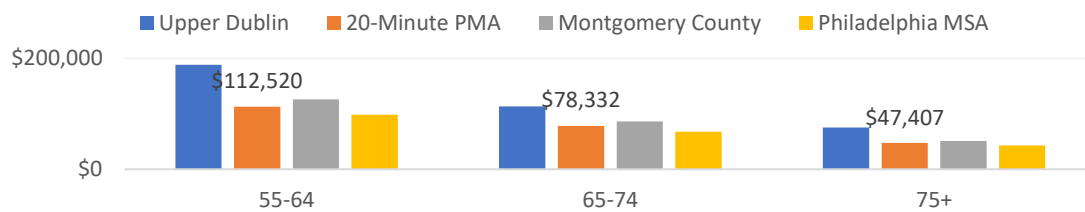
Senior Income and Tenure Characteristics

PMA residents ages 65 and older with annual median household incomes of up to \$79,000 present potential opportunities for market-rate active adult and independent living housing.

Income levels among residents 55 and older can vary significantly, as some younger senior householders may be working into traditional retirement years, while older senior householders may be retired with incomes supplemented by pensions, savings, investments, or social security. Median household income levels among PMA seniors are highest among householders ages 55 to 64 (\$112,520), compared to those ages 65 to 74 (\$78,332), and those 75 and older (\$47,407). There are currently 37,946 PMA householders ages 65 and older (a number expected to increase to 49,614 by 2028) and with median annual incomes of up to \$79,000, these households present potential opportunities for market-rate active adult and independent living housing.

Homeownership rates typically decline as householders age and transition into senior housing. For example, in 2020, homeownership rates in the PMA ranged from 77% among householders ages 65 to 74, to 40% among householders 75 and older. This sharp drop in homeownership suggests PMA seniors begin to consider moving into renter-occupied housing in their mid-70s., as these seniors may no longer desire or be able to maintain their single-family homes or prefer to move into housing that offers greater freedom from maintenance and/or includes supportive services.

Figure 58. Median HH Income by Age of Householder, 2023



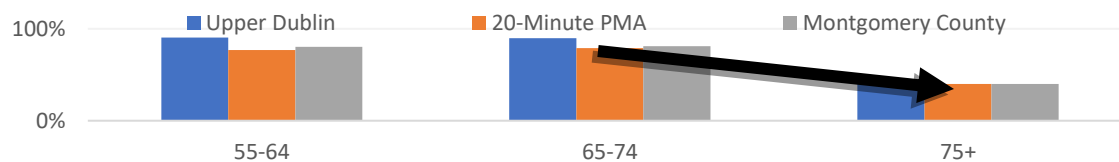
Source: Esri

Figure 59. PMA Senior Household with Median HH Incomes \$75,000 or Higher

	Householder Age			Total 55+	Total 65+
	55-64	65-74	75+		
2023	36,027	24,702	13,244	73,973	37,946
2028	35,729	29,735	19,879	85,343	49,614

Source: Esri

Figure 60. Homeownership Rate Among Senior Households, 2020



Source: Esri

Appendix

Interviews

4ward Planning conducted email and telephone outreach to knowledgeable area real estate professionals for their perspectives of the local market. In total, 13 individuals were identified and contacted via email and telephone, with a series of follow-up correspondence. The following responded and subsequently offered their time and insight, supplementing our data analysis.

- Jenna Cutilli, Sales Associate, Weichert Realtors, Blue Bell
- Mary Lynne Loughery, Real Estate Agent, Long & Foster, Blue Bell
- Sam Massey, Sales Associate, Berkshire Hathaway, Fox & Roach, Blue Bell
- Josh McKnight, Real Estate Agent, Keller Williams, Horsham
- Kevin Toll, Realtor, Keller Williams, Conshohocken



Appendix F: Fiscal Impact Analysis

This appendix includes the Fiscal Impact Analysis conducted by 4Ward Planning. Findings from this analysis are incorporated into the Future Land Use Chapter.

DRAFT

Fiscal Impacts Associated for Various Redevelopment Scenarios

Upper Dublin Township

Comprehensive Plan

Is your land-use strategy “4ward Tested”®



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Is your land-use strategy “4ward Tested”®



Fiscal Impact Scenario

Overview and Key Findings

What is Fiscal Impact Analysis and Why Perform the Analysis?

A fiscal impact analysis examines the linkage between local government revenue generated by new development and its resultant municipal service costs (e.g., police, fire, schools, sanitation, etc.). The outcome of such an analysis is to produce a project-related estimate of community service costs to projected revenues, a “cost-revenue ratio,” which will be positive (a revenue surplus), negative (a revenue shortfall), or neutral (break-even).

Land-use planning (specifically, creation of a comprehensive plan) involves decisions which have real world consequences (e.g., the number of new households which will form; the type and scale of commercial buildings; the number of new public personnel needed to facilitate public services; increase in public facility usage; etc.). Projecting the fiscal impacts of land-use decisions, in advance of implementing the land-use plan, is a prudent action to help avoid long-term undesirable impacts to a community’s financial position and quality of life.



What is 4ward Planning's Charge?

Michael Baker International requested 4ward Planning to perform fiscal impact analyses associated with hypothetical development scenarios for select areas within Upper Dublin Township.

The hypothetical land-use scenarios modeled for fiscal impacts are deemed market receptive based on the earlier performed market analysis conducted by 4ward Planning in support of the comprehensive planning effort.

While fiscal impact analyses, when well performed, can identify service and capital cost impacts associated with future land development projects, it is not an exact science. There are many variables and assumptions which underpin fiscal impact modeling and slight changes to any these will, likely, produce varying results.

Furthermore, while 4ward Planning has modeled fiscal impacts associated with market supportable development and redevelopment scenarios for select locations within Upper Dublin Township, it should not be assumed that such development would occur simultaneously. Indeed, the likelihood is that if these build-out scenarios were to occur they would happen over a period of five- to ten-years; and, even then some of the supported land-uses will not come to fruition due to a lack of market demand at some distant future point.



Key Findings

All four of the redevelopment scenarios examined resulted in positive net impacts to Upper Dublin Township and the Upper Dublin School District. Further, and with the exception of one scenario (large multi-family scenario), no additional municipal or school personnel are likely to be required. However, if two or more of the redevelopment scenarios were to be undertaken within a two to three-year span, it is likely that additional municipal and school district personnel would be required, in addition to certain capital improvements (e.g., expansion of one or more school buildings).

The redevelopment scenarios modeled assume demolition of most or all buildings on an underutilized site (e.g., not realizing it's highest and best use potential); infill development on sites where existing commercial establishments are operating would significantly disrupt business activity and make such redevelopment untenable.

Further, and related, the redevelopment scenarios modeled for fiscal impacts do not consider the lost tax revenues and service costs associated with the business operations replaced. However, given the redevelopment density modeled in this analysis, it is more likely than not that the positive fiscal impact from the modeled scenarios would exceed the positive impacts from existing development.



Fiscal Impact Scenario

Small Scale Mixed-Use Project



Small Scale Mixed-Use Scenario

Overview

This scenario assumes redevelopment on land area ranging from three- to four-acres, featuring multi-family residential unit development scaled at two to three stories with ground floor commercial space and possibly a one or two pad site commercial spaces. 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 at 36 units per acre.

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



Small Scale Mixed-Use Scenario

Residential Land-Uses

To perform fiscal impact modeling on the residential portion of the build-out program, 4ward Planning made assumptions concerning the bedroom counts by housing category, based on its deep experience performing residential market studies and known trends concerning household formation and household sizes in the study area.

Bedroom counts are the basis for estimating population metrics and are used with estimated population multipliers (based on the latest five-year American Community Survey (ACS) data for Pennsylvania) to project the number of adults and public school-age children associated with the residential build-out.

Residential multiplier data and the associated methodology is exhibited in the methodology section of this report.



Small 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	20	28%	575	\$1,600	\$2.78
1BR	20	28%	825	\$1,950	\$2.36
2BR	60	44%	1,190	\$2,500	\$2.10
3BR	<u>0</u>		<u>1,240</u>	<u>\$2,850</u>	<u>\$2.30</u>
Total	100		99,400		
Weighted Avg.			994	\$2,210	\$2.29

The above table exhibits the residential land-use type and number of units. The 100 units comprised of studio, one- and two-bedroom units will have a weighted average leasable square footage of 994 and a weighted average monthly rent of \$2,210.

Monthly rent rates are estimated based on the observed rental rates for the newest multi-family rental projects located in the Upper Dublin market area (an approximate 10-mile radius of the township).

The net leasable building area represents total building area, exclusive of common areas is 99,400 s.f., representing 83 percent of the gross building square footage (119,749).



Small 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>
General Retail Space	8,000	\$25	\$200,000
Dining/Cafe Spaces	5,000	\$30	\$150,000
Personal Service Space	<u>2,000</u>	<u>\$25</u>	<u>\$50,000</u>
Total	15,000		\$400,000

Estimated lease rates are based on currently observed commercial retail and restaurant lease rates in the market area containing Upper Dublin Township and assumes newly built space will command premium lease rates.



Small Scale Mixed-Use Scenario

New Residents and Workers



147 Residents



20 Public School Children



40 Full- and Part-Time Employees

Small Scale Mixed-Use Scenario

Projected First Year Stabilized Revenues

\$136,906	■	Twp. Property Tax Revenues	} Total First Year Stabilized Revenue
\$ 5,956	■	Twp. Local Svc. Tax Revenues	
\$ 41,992	■	Twp. Earned Inc. Tax Revenues	
			\$184,854
\$839,394	■	UDSD Property Tax Revenues	} Total First Year Stabilized Revenue
\$ 0	■	UDSD Local Svc. Tax Revenues	
\$ 41,992	■	UDSD Earned Inc. Tax Revenues	
			\$881,386



Small 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.



Small Scale Mixed-Use Scenario

Projected First Year Stabilized Service Costs

\$ 31,605 ■ **Twp. First Year Service Cost**

\$ 64,317 ■ **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).

Note: See budget adjustment methodology section on page XX.



Small Scale Mixed-Use Scenario

Projected Net Fiscal Impact for First Stabilized Year

\$ 184,854

Twp. First Year Projected Revenue

\$ 31,605

Twp. First Year Projected Service Cost

\$ 153,249

Positive Net Fiscal Impact

\$881,386

UDSD First Year Projected Revenue

\$ 64,317

UDSD First Year Projected Service Cost

\$817,069

Positive Net Fiscal Impact



Fiscal Impact Scenario

Small Scale Multi-Family Project

Small Scale Multi-Family Scenario

Overview

This scenario assumes redevelopment on land area ranging from six to eight-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 at 36 units per acre.

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



Small Scale Multi-Family Scenario

Residential Land-Uses

To perform fiscal impact modeling on the residential portion of the build-out program, 4ward Planning made assumptions concerning the bedroom counts by housing category, based on its deep experience performing residential market studies and known trends concerning household formation and household sizes in the study area.

Bedroom counts are the basis for estimating population metrics and are used with estimated population multipliers (based on the latest five-year American Community Survey (ACS) data for Pennsylvania) to project the number of adults and public school-age children associated with the residential build-out.

Residential multiplier data and the associated methodology is exhibited in the methodology section of this report.



Small Scale Multi-Family 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	40	20%	575	\$1,600	\$2.78
1BR	40	20%	825	\$1,950	\$2.36
2BR	100	50%	1,190	\$2,500	\$2.10
3BR	<u>20</u>	<u>10%</u>	<u>1,240</u>	<u>\$2,850</u>	<u>\$2.30</u>
Total	200		199,800		
Weighted Avg.			999	\$2,245	\$2.31

The above table exhibits the residential land-use type and number of units. The 200 units comprised of studio, one-, two-, and three-bedroom units will have a weighted average leasable square footage of 999 and a weighted average monthly rent of \$2,245.

Monthly rent rates are estimated based on the observed rental rates for the newest multi-family rental projects located in the Upper Dublin market area (an approximate 10-mile radius of the township).

The net leasable building area represents total building area, exclusive of common areas is 199,800 s.f., representing 83 percent of the gross building square footage (240,723).



Small Scale Multi-Family Scenario

New Residents



308 Residents



49 Public School Children



Small Scale Multi-Family Scenario

Projected First Year Stabilized Revenues

\$ 267,436	■	Twp. Property Tax Revenues	} Total First Year Stabilized Revenue \$ 364,871
\$ 12,123	■	Twp. LST Revenues	
\$ 85,312	■	Twp. EIT Revenues	
\$1,639,698	■	UDSD Property Tax Revenues	} Total First Year Stabilized Revenue \$1,725,010
\$ 0	■	UDSD LST Revenues	
\$ 85,312	■	UDSD EIT Revenues	



Small 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.



Small Scale Multi-Family Scenario

Projected First Year Stabilized Service Costs

\$ 58,520 ■ **Twp. First Year Service Cost**

\$157,576 ■ **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.

Small Scale Multi-Family Scenario

Projected Net Fiscal Impact for First Stabilized Year

\$ 364,871

Twp. First Year Projected Revenue

\$ 58,520

Twp. First Year Projected Service Cost

\$ 306,351

Positive Net Fiscal Impact

\$1,725,010

UDSD First Year Projected Revenue

\$ 157,576

UDSD First Year Projected Service Cost

\$1,567,434

Positive Net Fiscal Impact



Fiscal Impact Scenario

Large Scale Mixed-Use Project

Large Scale Mixed-Use 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 with ground floor commercial space and one or two pad site commercial spaces. 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 at 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

To perform fiscal impact modeling on the residential portion of the build-out program, 4ward Planning made assumptions concerning the bedroom counts by housing category, based on its deep experience performing residential market studies and known trends concerning household formation and household sizes in the study area.

Bedroom counts are the basis for estimating population metrics and are used with estimated population multipliers (based on the latest five-year American Community Survey (ACS) data for Pennsylvania) to project the number of adults and public school-age children associated with the residential build-out.

Residential multiplier data and the associated methodology is exhibited in the methodology section of this report.



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

The above table exhibits the residential land-use type and number of units. The 300 units comprised of studio, one- and two-bedroom units will have a weighted average leasable square footage of 945 and a weighted average monthly rent of \$2,137.

Monthly rent rates are estimated based on the observed rental rates for the newest multi-family rental projects located in the Upper Dublin market area (an approximate 10-mile radius of the township).

The net leasable building area represents total building area, exclusive of common areas is 283,600 s.f., representing 83 percent of the gross building square footage (341,687).



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

Estimated lease rates are based on currently observed commercial retail and restaurant lease rates in the market area containing Upper Dublin Township and assumes newly built space will command premium leas rates.

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 \$ 545,103
\$ 17,065	▬▬	Twp. LST Revenues	
\$ 121,811	▬▬	Twp. EIT Revenues	
\$2,490,654	▬▬	UDSD Property Tax Revenues	} Total First Year Stabilized Revenue \$2,612,464
\$ 0	▬▬	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

\$ 545,103

Twp. First Year Projected Revenue

\$ 95,373

Twp. First Year Projected Service Cost

\$ 449,730

Positive Net Fiscal Impact

\$2,612,464

UDSD First Year Projected Revenue

\$ 154,360

UDSD First Year Projected Service Cost

\$2,458,104

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 at 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

To perform fiscal impact modeling on the residential portion of the build-out program, 4ward Planning made assumptions concerning the bedroom counts by housing category, based on its deep experience performing residential market studies and known trends concerning household formation and household sizes in the study area.

Bedroom counts are the basis for estimating population metrics and are used with estimated population multipliers (based on the latest five-year American Community Survey (ACS) data for Pennsylvania) to project the number of adults and public school-age children associated with the residential build-out.

Residential multiplier data and the associated methodology is exhibited in the methodology section of this report.



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

The above table exhibits the residential land-use type and number of units. The 200 units comprised of studio, one-, two-, and three-bedroom units will have a weighted average leasable square footage of 999 and a weighted average monthly rent of \$2,245.

Monthly rent rates are estimated based on the observed rental rates for the newest multi-family rental projects located in the Upper Dublin market area (an approximate 10-mile radius of the township).

The net leasable building area represents total building area, exclusive of common areas is 399,600 s.f., representing 83 percent of the gross building square footage (481,446).



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 \$ 751,645
\$ 24,244	▬▬	Twp. LST Revenues	
\$ 170,622	▬▬	Twp. EIT Revenues	
\$3,279,365	▬▬	UDSD Property Tax Revenues	} Total First Year Stabilized Revenue \$3,449,987
\$ 0	▬▬	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

\$ 751,645

Twp. First Year Projected Revenue

\$ 117,040

Twp. First Year Projected Service Cost

\$ 634,605

Positive Net Fiscal Impact

\$3,449,987

UDSD First Year Projected Revenue

\$ 795,153

UDSD First Year Projected Service Cost

\$2,654,834

Positive Net Fiscal Impact



Fiscal Impact Methodology

Population Multipliers – Methodology

Service costs for municipalities and school districts are, largely, a function of the number of residents and public school-age children living in the subject jurisdictions. In turn, the number of residents and school-age children are a function of the type and amount of housing that gets developed, with bedroom counts per unit the principal determining factor.

4ward Planning recently created an algorithm which analyzed 2014 to 2018 American Community Survey (ACS) data – an annual survey of U.S. households which is conducted by the U.S. Census. The analysis was focused on households and their living arrangements (e.g., housing tenure (own vs. rent), housing type (single-family detached vs. single-family attached (townhouse), multi-family rental vs. multi-family condo; and bedroom counts (e.g., studios, one-bedrooms, two-bedrooms, three-bedrooms, etc.); recently constructed housing and recently moved-into housing.



Population Multipliers – Methodology (continued)

While the obvious choice for identifying the number of persons and public school-age children who live in newly constructed housing is to examine the household population statistics for newly constructed housing provided by the ACS, unfortunately, the margin of error for this particular category was unacceptably high due to an insufficient sample size (we examined data at the state level). Consequently, as a proxy, we used housing data where the occupants had only recently moved into the unit (had been living within the unit for four years or less). The survey data was far more robust than persons living in newly constructed housing units and, thus, the margin or error was considered within acceptable limits.

Using the four-year period of 2014 to 2018, the latest data set available at the time of our analysis), we performed a series of complex regression analyses on the ACS data to derive not only the average number of persons living in a given housing type and having a certain number of bedrooms, but, also, the number of public school-age children, as well (we were able to identify children enrolled in public school as opposed to private or parochial school).

Once this data was analyzed and reviewed for soundness (e.g., ensuring that the sample size was large enough to make an inference about the average number of persons per unit, given various characteristics), we created a table of residential multipliers for Pennsylvania, which is inclusive of public school-age children.



Population Multipliers – Methodology (continued)

While the residential multipliers may not always reflect the precise number of persons who will move into a given housing unit, residential multipliers have, in general, been reasonably predictive of the total number of occupants and public school-age children over a large inventory of housing types.

Consequently, we utilize this technique to estimate the likely number of total persons and public school-age children produced by the development of varying housing types.

Multiplier data appears on the following page.

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

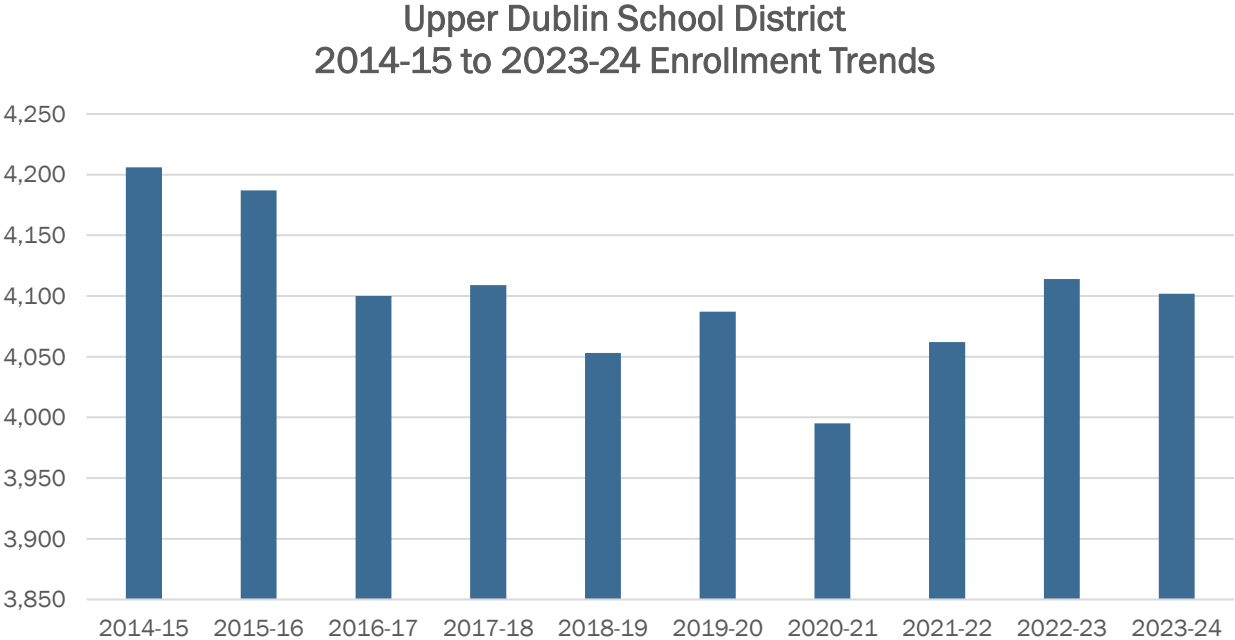
BR Count	Single-family Detached	Single-family Attached	Multi-family Condo	Multi-family Rental
Studio	NA	NA	0.00	0.00
1-BR	NA	NA	0.00	0.00
2-BR	NA	0.02	0.17	0.18
3-BR	0.45	0.49	0.74	0.80
4-BR	0.75	0.94	NA	NA

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



UDSD Enrollment Trends

The below table exhibits the enrollment trends for Upper Dublin School District over a ten-year period (2014-15 to 2023-24 school years). The enrollment trend suggests there is capacity in the school district to handle additional school children. However, capacity at each grade level likely varies and, thus, the ability of the school district to accommodate additional enrollment will be based on the age and grade level for entering students. This analysis is beyond the scope of this study.



Source: Pennsylvania Department of Education, 2024



Budget Adjustment Methodology

The most widely used technique for performing fiscal impact analyses (the per capita approach) has, with few exceptions, included all line-item expenditures within municipal and school district annual budgets. Ostensibly, this approach makes sense, as, if the objective is to derive a per capita budget expenditure cost, the sum total of all expenditure line items should be included when dividing by the current jurisdiction's population or households. However, this approach grossly overestimates the likely per capita/per household cost due to the inclusion of salaries, wages and fringe benefit costs of municipal and school district personnel, as well as the inclusion of capital outlays, fund transfers and debt service payments by municipal government and school districts.

The underlying theory of the per capita approach is that a pro rata share of goods and services are exhausted (worn out) by each resident's (or household's) consumption of said goods, services, and natural resources over some period (whether a month, a year or five years).

For, example, a municipality has a certain number of housing units, each of which will receive notices over the course of the year from the municipality (e.g., tax notices, water and/or sewer bill notices, health department notices, etc.). These notices are mailed and, thus, consume paper, ink and postage, in addition to the labor involved in processing said notices. Separating out labor cost, for the moment, there is a known total cost for producing these notices and, via a simple calculation, the cost per household (recognizing that regardless of the number of household members, there is, with few exceptions, only one notice sent per household).



Budget Adjustment Methodology (continued)

Consequently, should additional households form within that municipality, the increase in total costs associated with sending public notices should, ostensibly, be known in advance, as the additional cost is simply a function of the per household cost multiplied by the number of new households.

Similarly, a school district will purchase a certain number of textbooks based on the student enrollment within its district. If there is an influx of new residents and the number of students is projected to increase over the current student enrollment figure, then more textbooks will be purchased and a known additional cost can be derived (note: where the school district has a sufficient number of textbooks prior to new students arriving, either due to an unexpected decrease in enrollment in prior years or its having purchased more text books than necessary, no incremental textbook cost should be attributed to each new student, as the textbook costs are already amortized over the existing student body in place, prior to the arrival of the new students). Additionally, the same logic would apply to other supplies, such as paper, pens and pencils, notebooks, chalk, staples, markers, etc.) that a school district would purchase.

While a case is easily made for the consumption of municipal and school district supplies and materials associated with residents, households and students, the consumption or wearing out of personnel (whether municipal or school district associated) cannot be calculated in a similar manner.



Budget Adjustment – Methodology (continued)

Specifically, the addition of residents and households to a municipality doesn't diminish the physical capacities of the town clerk, public works director or health department director, or their staffs; as while they may have to spend a marginal amount of additional time in providing service to additional residents, each of these workers will continue to work an eight hour shift and earn the same wage or salary, regardless of whether the municipality experienced an increase in 100 households or a decrease 100 households (this is an economies of scale effect). The same can be said of school district personnel – an increase or decrease in enrollment, generally, will have little practical impact on the capacity and cost of a district employee.

However, while municipal and school district personnel are not “consumed” in the same way as office supplies, there comes a point at which additional residents (in the case of a municipal employee) or additional students (in the case of a school district employee) necessitates greater capacity than can be provided by existing personnel (most municipal and school district employees are full-time salaried personnel and, thus, for all intents and purposes, their service delivery per day, week, month and year remains relatively fixed, regardless of the change in population (municipal) or student enrollment (school district)).

Budget Adjustment – Methodology (continued)

It is in these situations that additional personnel are, generally, hired and an attendant increase in personnel cost incurred by the municipality and/or school district.

Conducting interviews with the municipal business administrator and school district superintendent (the Case Study approach) for purposes of understanding existing service delivery capacities and how these capacities might be over-burdened with an increase of residents and public school students is a superior approach to identifying the prospective municipal and school district personnel impact (staffing and associated costs) than using the per capita method which automatically assumes each new resident and student will require additional personnel and associated costs.

For example, while 100 new households may form within a municipality (and an assumed 250 new residents in total), it is highly unlikely that new professional and administrative staff (e.g., clerk, tax collector, health department personnel, engineering staff, business administrator, etc.) would need to be increased, given the economies of scale for delivering service (principally, made possible by computer technology and modern administrative methods). Sending an additional 100 public notices or processing an additional 100 tax payments is relatively simple in the age of computers.

Budget Adjustment – Methodology (continued)

Similarly, two or three new students who are assigned to a classroom which has four or five available desks, extra textbooks and a teacher already present are not likely to cause the school district to increase personnel or associated costs; that is, sufficient capacity to accommodate these students is evident.

Finally, the exclusion of capital outlays, fund transfers, and debt service payments from budget expenditures, in advance of performing a fiscal impact analysis is only logical, as these expenditures, while real, are not influenced by the increase or decrease in the number of residents, households or enrolled students in a give jurisdiction – the amount of debt payments will not fluctuate if four hundred new residents arrive or four hundred residents leave. Consequently, to include these budget expenditures in the analysis is to overestimate service costs associated with new residents, households and students.

Consequently, this analysis excludes personnel cost (salaries, wages and benefits), capital outlays, fund transfers and debt service from the budget expenditures used in deriving the fiscal impacts to both the city and school district. It is assumed that if additional personnel are required, surplus revenues (assuming there will be a surplus) would offset said personnel costs.

Budget Adjustment – Methodology (continued)

The Per Capita Multiplier Method

Based on the Per Capita Multiplier Method for estimating fiscal impact analysis, “the residential share of all residential and nonresidential service costs is estimated by dividing the residential property value and number of residential parcels by all nonresidential property values and the number of nonresidential parcels, respectively. The calculation produces the residential percent of the residential/nonresidential parcels and the residential percent of the residential/nonresidential property value. The results are averaged, and the combined value is then applied to the total local municipal costs to derive the estimated residential-associated share.”¹

Utilizing real property data obtained from Property Shark, an online purveyor of real property data, 4ward Planning utilized the below metrics to identify the residential share of Upper Dublin’s annual service costs:

2024 Residential Parcels²:	7,614	2024 Residential Assessed Value²:	\$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>
Total:	10,519	Total:	\$2,613,627,819
Residential Percentage:	72.4%	Residential Percentage:	62.3%

¹Development Impact Assessment Handbook, Urban Land Institute, 1994



Budget Adjustment - Methodology

The average of the residential land parcel share and residential assessed value share is 72.4 percent and 62.3 percent, respectively. Consequently, only 67.4 percent of the identified per capita municipal service cost is attributable to residential service costs, as will be demonstrated in this analysis.



Budget Adjustments – Twp. and UDSD

2024 Total Approved Expenditures	\$60,528,868 ¹
<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
Total Adjusted Budget:	\$7,655,675

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

Estimated 2024 Population 27,205²

2024 Student Enrollment 4,102⁴

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

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.

¹ Upper Dublin Township 2024 Adopted Budget
² Estimated based on U.S. Census Bureau 2023 estimate
³ Upper Dublin School District 2023-24 Adopted Budget
⁴ Pennsylvania Department of Education, 2024



Methodology – Real Estate Analysis

An appraiser (or property tax assessor) will typically assess newly constructed commercial real estate (apartments and retail), for real property tax purposes, using the income approach to valuation, as further described below:

- **Income Approach to Valuation** – The tax assessor identifies a capitalized value for the stabilized development (typically, after the building is 95 percent occupied) by using the developer’s projected rent and expenses or the known rent and expenses from a similar development nearby, estimating annual net operating income (NOI) and dividing this value by market-based capitalization rate (Cap rate).
- **Capitalized Value** – Capitalized value represents the market value of the subject building. That is, to derive an assessed value for property tax purposes, the subject property’s market value is determined by dividing the property’s estimated net operating income (see NOI definition) by a capitalization rate (see definition), plus the addition of an equalized tax rate (this functions to arrive at a correct valuation. While a capitalized value may not be the exact amount a property would fetch on the open market, it is considered a reasonably close value approximation of an arms length market transaction).
- **Cap Rate** – The capitalization (cap) rate represents an average ratio of a property’s net annual operating income (NOI) to the average sales price of comparable properties (in this case, luxury multi-family rental) within the market area. It is an approximation of what the property’s annual financial return rate should be for an investor, given the project’s risk profile and local market conditions for similar properties.



Methodology – Real Estate Analysis

- **Stabilization** – The year when the property’s vacancy rate has stabilized (reached the long-term vacancy rate).
- **Net Operating Income (NOI)** – Includes all associated property maintenance expenses, insurance, management fees, marketing expenses, and utilities. Real property taxes are excluded for purposes of estimating taxable value upon which the township’s real property tax rate will be applied. For purposes of this study, NOI for multi-family rental properties represents 80-percent of a property’s effective annual gross rent revenue (maximum rent revenue possible minus revenue lost due to vacancy and payment default). For commercial centers (containing general retail, restaurants, personal services, small offices, etc.) NOI represents 85-percent of a property’s effective annual gross rent, assuming these tenants pay a pro-rata share of all utilities, maintenance for common areas, and insurance.

Below, cap rate and NOI assumptions are identified for the land-uses modeled in this study:

Cap Rate – Multi-family: 6.0%

Cap Rate – Commercial Centers: 7.0%

NOI – Multi-family: 80%

NOI – Commercial Centers: 85%



Methodology – Tax Revenues

Upper Dublin Township collects tax revenues for municipal and school district services via three principal tax mechanisms:

Real Property Tax: Traditional property based tax levy which applies the annual tax rate against the assessed value of real property (e.g., a house, apartment building, shopping center, industrial building, etc.)

Earned Income Tax (EIT): The Earned Income Tax in Upper Dublin Township is one percent (1.0%) of the Earned Income/Net Profits for all Township residents. Also included are any non-residents engaged in business, working or headquartered out of an office within the township. For purposes of this study and to reduce the complexity of estimating the tax, the EIT is only calculated for new township residents. The EIT revenues received are split equally between the township and school district. (0.5 percent to the township and 0.5 percent to the school district).

For purposes of this analysis, all new households and workers are subject to the EIT. Household EIT is estimated by dividing gross annual housing revenue for rental units by 30 percent (assuming households are paying no more than 30 percent of their income towards shelter) and multiplying this quotient by the EIT. For owner occupied units, estimated income is estimated by assuming a five-percent interest rate mortgage, with a 10-percent downpayment and 30-year fixed term. The resultant annual mortgage payment is divided by .30 to arrive at an estimated household income.

Local Service Tax: The LST is assessed on each employed individual in the township at \$52 annually, with \$47 provided to the school district and \$5 to the township.



Methodology – Tax Revenues

Common Level Ratio (CLR): As defined by Pennsylvania statute, “Common Level Ratio shall mean the ratio of assessed value to current market value used generally in the county as last determined by the State Tax Equalization Board (STEB).” The CLR for the 2024-25 fiscal year is 3.04. For practical purposes, this means that a property with a market value of \$600,000 would have an assessed value for tax purposes of \$197,368.

The method more commonly used to determine the taxable value is to take the inverse of the CLR factor – in this case, 1 divided by 3.04 equaling 0.3289 or 33-percent if rounded.

The 33-percent assessment ratio is applied to the market values developed for this analysis to arrive at the estimated tax levy. Below is an example of how taxable value is derived for a multi-family rental development using the real estate valuation factors identified:

Stabilized Net Operating Income:	\$ 4,000,000 (after expenses)
Divided by Fully Loaded Cap Rate (10.45%) ^a :	\$38,277,512 (estimated market value)
Market Value Multiplied by Assessment Ratio (33%):	\$12,631,579 (assessed value)
Assessed Value Multiplied by Tax Rate (4.45%) ^b :	\$ 562,105 (tax levy; effective rate is 1.47%)

^a Fully loaded cap rate adds the property’s cap rate to the sum of the municipal and school district tax rates

^b Only the municipal and school tax rates are used, as all other tax rates are not of concern for this analysis.



General & Limiting Conditions

4ward Planning Inc. has endeavored to ensure that the reported data and information contained in this report are complete, accurate, and relevant. All estimates, assumptions, and extrapolations are based on methodological techniques employed by 4ward Planning Inc. and believed to be reliable. 4ward Planning Inc. assumes no responsibility for inaccuracies in reporting by the client, its agents, representatives, or any other third-party data source used in the preparation of this report.

Further, 4ward Planning Inc. makes no warranty or representation concerning the manifestation of the estimated or projected values or results contained in this study. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from 4ward Planning Inc. This study is qualified in its entirety by, and should be considered in light of, the above limitations, conditions, and considerations.





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