



## **Bryn Mawr TRID Plan**

Prepared for  
**Lower Merion Township  
Bryn Mawr, PA**

Submitted by  
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**ERA Project No. 16959**



**madden.**  
PLANNING  
GROUP



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## **I. Executive Summary**

The Bryn Mawr Transit Revitalization Investment District (TRID) Plan presents data and analysis to support transit-oriented development (TOD) centered on the Bryn Mawr Station and Bryn Mawr Town Center. TOD supports compact, walkable neighborhoods and commercial areas around transit stations. TOD encourages increased transit ridership by creating destinations within a short walk of stations. It also offers residents a convenient commute to jobs, shopping, educational institutions and entertainment in the region.

The original design and development of Bryn Mawr was an early form of TOD, as were other Main Line communities that developed along the Main Line of the Pennsylvania Railroad. By re-enforcing the TOD concept in Bryn Mawr, we are reconnecting the community with its origins. By promoting transit-oriented development, there is potential to increase the number of rail riders and to realize a better return on public investment in infrastructure and services.

TOD is not just good fiscal policy. It also helps relieve road congestion by making it easier for people to leave their cars at home. The goal is to surround stations with vibrant neighborhoods and communities where people can live, work and shop or eat out, all within a safe and pleasant walk to trains, buses and other transportation modes. By incorporating a strategy that acknowledges the needs and role of automobile parking in the district, the Bryn Mawr TRID plan works to reduce the number of automobiles on heavily-congested roadways as well as the environmental impacts of those vehicles. Downtown Bryn Mawr's struggle with traffic and parking may be somewhat mitigated by increased transit ridership, allowing downtown businesses to be more competitive.

Placing a variety of land uses around transit stations can improve quality of life and access to jobs, stimulate community reinvestment and boost property values.

### **Transit Revitalization Investment District (TRID)**

The Transit Revitalization Investment District Act ("TRID") was enacted in 2004 by the Pennsylvania legislature and encourages municipal officials, transit agencies, and the development community to plan for and implement transit-oriented development surrounding transit stations. TRID encourages partnerships between transit agencies and local communities to achieve transit-oriented development including providing for public and transit facilities improvements while increasing ridership and spurring community revitalization and economic development. TRID legislation encourages transit-oriented development (TOD) and transit-proximate development by providing public policy and incentives to support such development. A financial mechanism is allowed which permits the accumulation of the value added resulting from development or redevelopment and

redevelopment at or near transit stations. The legislation also encourages community involvement in the revitalization process and planning. Encouraging multiple uses at or near transit facilities is a means to leverage existing infrastructure and town forms, increasing the value of properties (and thus the tax base) and relieving congestion. A mix of multifamily and single family residences with nearby shopping and services with convenient access to transit make more efficient use of existing urban infrastructure, is convenient to residents, consumes less land, and ultimately preserves open space. Reduced automobile dependency leads to lower household costs, less congested roadways and increased ridership for transit. In addition, the state will provide funding through the Department of Economic and Community Development (DCED) to assist with the plan's capital improvements.

Lower Merion Township, in cooperation with the appropriate transit agencies (SEPTA and Amtrak) and other taxing jurisdictions impacting real estate taxes in Bryn Mawr (Montgomery County and the Lower Merion School District) proposes to create a Transit Revitalization Investment District (TRID) for the Bryn Mawr town center.

### **TRID "Value Capture"**

TRID allows for a financing mechanism through a methodology termed "value capture" to support improved facilities and infrastructure, as well as an organizational structure to facilitate the cooperation of transit and public sector units. As investment and reinvestment occurs within the designated TRID area, rising land values create additional property taxes for use by local jurisdictions. "Value capture" occurs when the local jurisdiction diverts the property tax increment derived from the increase in property values over an established base year to a fund that can be used to pay off capital bonds or for annual expenditures for public improvements within the TRID area. For the Bryn Mawr TRID, Lower Merion Township could use the diverted real estate tax funds to augment or offset project costs rather than as a bond financing mechanism. *Funds resulting from the value capture mechanism are not a property tax increase.* The amount of real estate tax owed does not change with the establishment of the TRID district.

Transportation projects and nearby improvements, for example, can increase adjacent land values, and thus generate a premium for private landowners. In general, public agencies can, with legislative authorization and an approved plan, capture a portion of that premium with any of the following methods: 1) local investment districts, including Pennsylvania's Transit Revitalization Investment District (TRID) legislation; 2) public-private development of adjacent land; 3) traffic impact fees; 4) tax increment financing (TIF) districts; or 5) buying privately held land near transportation hubs that is zoned for low-density use on the open market, then either selling the land to private developers or

creating a public/private partnership, capturing the capital gain resulting from both the increase in designated use density and the presence of the transportation hub.

### **Relationship to the Bryn Mawr Master Plan**

The TRID process in Bryn Mawr has been based upon the principles outlined in the Bryn Mawr Master Plan completed in July 2006. The Bryn Mawr Master Plan was funded by a grant from the Delaware Valley Regional Planning Commission (DVRPC), who has also funded this TRID plan study. TRID legislation provides the opportunity to implement the vision for Bryn Mawr outlined in the Master Plan. Based on future development proposed in the Bryn Mawr Master Plan, the Bryn Mawr TRID plan provides for the revitalization of the Bryn Mawr town center adjoining the train station. In addition, several proposed parking improvements will provide parking for local businesses and commuters that will positively affect the number of passengers utilizing mass transit and promote expanded retail and commercial opportunities. The TRID District encourages transit-oriented development (TOD) in areas adjacent to the train station and supports development in the surrounding areas.

Downtown Bryn Mawr is well-positioned to use the TRID concept to meet the legislation's objectives. The Bryn Mawr Station is served by SEPTA's R5 Paoli/Thorndale Regional Rail line with connections to AMTRAK at Philadelphia's 30<sup>th</sup> Street Station and to the Philadelphia International Airport. A key intermodal link on the Main Line and one of the top stations for ridership along its route, Bryn Mawr Station presents an opportunity to leverage transit infrastructure, increase ridership by commuters, shoppers, students and visitors, and reduce automobile trips on heavily-used Lancaster Avenue.

The Bryn Mawr village center is within a short walk to Lancaster Avenue retail, residential homes and apartments, employment centers such as Aqua America and Bryn Mawr Hospital and educational institutions such as Bryn Mawr College, the Baldwin School and the Shipley School. Cultural and civic facilities include the Ludington Library and the Bryn Mawr Film Institute. There has been a development program created for a potential lodging facility immediately across the street from the station at the Lot 7 site.

Through the potential redevelopment of municipal parking Lot 7, the lot referred to in the Master Plan as the "Verizon Lot", Central Avenue, and other selected parcels, TRID facilitates cooperation among the Township, SEPTA and Amtrak, Montgomery County and the Lower Merion School District. The transit linkage to the Bryn Mawr Town Center provides better access to services and improved facilities for Bryn Mawr citizens utilizing transit and other services.

The Bryn Mawr TRID District enables the coordination needed among the participants to develop new transportation infrastructure, improved land use, and new private development. The Bryn Mawr Village Zoning passed in 2008 will allow infill and redevelopment that is sensitive to the village character and can reinvigorate the station and surrounding business district. New pedestrian-oriented activity can help support existing retail, restaurants, and the Bryn Mawr Film Institute. The proposed mixed-use town center will be positioned to attract visitors as well as residents who already live, work, and study within walking distance of the village. The use of TRID value capture funds for capital improvements will provide a high quality of life for all Township residents who will benefit from these amenities.

For the purposes of the Bryn Mawr TRID, any funds resulting from the increased real estate tax value would flow to public improvements such as parking facilities and traffic and street infrastructure improvements, and would be primarily funded by increased real estate tax revenues resulting from private improvements such as the Lot 7 redevelopment, Bryn Mawr Hospital's eligible additions and improvements, the proposed Central Avenue development plan, and the "Verizon Lot" property within the designated TRID. The increased values resulting from the improvements will help off-set some expenses of the proposed public improvements outlined in the Bryn Mawr Master Plan and TRID plan.

### **TRID Management**

TRID legislation allows for various organizational structures to manage the TRID program. Lower Merion Township has proposed managing the Bryn Mawr TRID internally to keep administrative costs down and to be able to dedicate more of the funds to TRID projects.

## Introduction

A recent study, *Transit-Oriented Development in the United States: Experiences, Challenges, and Prospects* published by the Transit Cooperative Research Project (TCRP) reports measurable results and key elements of transit oriented development (TOD). That study defines transit-oriented development as “compact, mixed-use development near transit facilities and high-quality walking environments.” The TCRP study determined that typical TOD “leverages transit infrastructure to promote economic development and smart growth, and to cater to shifting market demands and lifestyle preferences.” Those conclusions could also sum up the objectives of Pennsylvania’s transit revitalization investment district (TRID) legislation and the proposed Bryn Mawr TRID. TOD is about creating sustainable communities where people of all ages and incomes have transportation and housing choices, increasing location efficiency where people can walk, bike and take transit. In addition, TOD boosts transit ridership and reduces automobile congestion, providing value for both the public and private sectors, while creating a sense of community and place. The TRID mechanism is a vehicle by which local government can support such economic development and growth by taking advantage of the rail network already in place and serving such communities as Bryn Mawr.

In some TOD projects joint development is often project-specific, taking place on, above, or adjacent to transit agency property. It involves the common use of property for transit and non-transit purposes. Proximity to rail transit has been shown to enhance property values and can increase the opportunity for fostering community and development partnerships. For the Bryn Mawr TRID, there is limited opportunity for development immediately adjacent to transit along the rail line or at the station (with the exception of parking facilities and limited development opportunities on two parcels on the north side of the tracks). However, the Bryn Mawr TRID plan presents TOD opportunities within a short walking distance of Bryn Mawr Station.

## Benefits

The potential benefits of TOD and related development are social, environmental, and fiscal. Focusing growth around transit stations capitalizes on expensive public investments in transit by producing local and regional benefits. Primary benefits include the revitalization of neighborhoods and commercial areas, financial gains for joint development opportunities (such as the development proposed for the Central Avenue area), increases in the supply of affordable housing, and profits to those who own land and businesses near transit stops. Secondary benefits include congestion relief, land conservation, road improvements, and improved safety for pedestrians and cyclists.



The benefit of the TRID as authorized by the Commonwealth is a financial mechanism that targets public funds to encourage TOD *without raising tax rates*. It focuses planning and funding in the targeted area for a specified period for maximum results.

### **TOD in Suburban Locations**

In its 2004 report *Hidden in Plain Sight, Capturing the Demand for Housing Near Transit*, the Center for Transit-Oriented Development listed the Philadelphia metro area as one of the top ten metro areas for potential demand for TOD housing. Housing near transit is growing all along the East and West Coasts. Mixed-use, transit-oriented development, or “transit villages”, is springing up in Connecticut, suburban Boston, New York City (suburban New Jersey) and in the suburbs of Washington, DC. Looking at suburban communities similar to Bryn Mawr in New Jersey and suburban Washington provides examples of affluent suburbs that have leveraged TOD to enhance retail development, provide housing, and increase property values.

In June, 2009 the Mineta Transportation Institute issued a study, *Effects of Suburban Transit Oriented Development on Residential Property Values* in the San Francisco area. The study concluded that TOD either had no impact or had a positive impact on the sales prices of surrounding single family homes. Contrary to TOD opponent statements, no negative property value impacts were identified in the study.

### **New Jersey**

New Jersey’s Transit Village Initiative provided access to existing funds and a streamlined development process for transit villages, areas typically within a ¼ to ½ mile radius around a transit station. The New Jersey program had a slow start-up period, as no additional funding was provided. Unlike the Pennsylvania TRID, no self-funding mechanism was developed to encourage action. However, even with program limitations, New Jersey transit villages have experienced increased commercial and residential TOD and joint developments. Studies suggest that proximity to transit has been an important factor in increasing demand for housing and increases in property values. New Jersey’s TOD experiences show that the places that have been most successful in turning around neighborhoods bordering train stations have generally been small towns with supportive public officials.

### **Washington, DC Suburbs**

Arlington County, Virginia has one of the best TOD success stories to tell. Through strategic planning and a favorable market (similar to Lower Merion Township), Arlington’s Metrorail stations have taken on specialized functions: three are major business and employment centers, one is a government

center, and another is a regional shopping center. Two stations, Clarendon and Virginia Square, function respectively as an “urban village” with shops and restaurants, and as a cultural and educational district. At Clarendon, a mixed-use project called Market Common at Clarendon successfully integrates pedestrian-friendly, transit-oriented design with automotive access for regional customers. The development includes apartments, townhouses, retail spaces and office space within walking distance of Metro Stations. From 1977 to 2002, ridership increased 54.6% at Clarendon Station.

In Bethesda, Maryland, another Washington suburb with demographics similar to Bryn Mawr, the Bethesda Row mixed-use TOD with office space, retail space (including 40,000 square feet of restaurants), movie theaters and residential development nearby has been a commercial and community success. Office occupancy rates are strong. Strong rental rates encourage development and ongoing property maintenance. Retail sales in Bethesda are above area averages. Proximity to transit increases access to customers and reduces traffic congestion on already crowded streets.

### **Bryn Mawr TRID**

The Bryn Mawr TRID plan is designed to meet several objectives for the community, private property owners and businesses. The planning process has involved community organizations, property and business owners, transit officials, elected officials and Lower Merion Township representatives.

This document represents the Bryn Mawr Transportation Revitalization Investment District (TRID) plan required by Pennsylvania as part of the process to establish a TRID district. Each section of the plan corresponds to legislative requirements of such plans, including:

- Rationale and authority for establishing the TRID district
- Documentation of a public process
- TRID Boundary delineation according to legislative requirements
- Existing conditions documentation, including context, infrastructure, and zoning
- Reinvestment and redevelopment potential, proposed land use
- Property availability
- Economic profile and real estate market conditions
- Air rights development potential
- Proposed infrastructure improvements

- Transportation-related Improvements
- Financial Plan
- Plan for future maintenance requirements
- Implementation plan including provision for a management entity

The estimated development program was based on the program prepared for the Bryn Mawr Master Plan. The actual development program, timing and ultimate values will be determined as a result of public and private development decisions. As some of the properties proposed for redevelopment are privately held, the decision to redevelop, if any, would be made by private owners. This plan does not recommend nor project any public taking of private property for redevelopment. As a result, the financial projections are based on a proposed development program.

Following the adoption of the Bryn Mawr TRID Plan by the Lower Merion Township Board of Commissioners, agreements will be requested from the other taxing jurisdictions including Montgomery County and the Lower Merion School District and from transit agencies SEPTA and Amtrak.

The Bryn Mawr TRID Plan was a collaborative process among Lower Merion Township staff, the *Ad Hoc* Bryn Mawr Committee, the Township Board of Commissioners, and the Bryn Mawr Civic Association. Economics Research Associates (ERA), Sasaki, Civic Visions, and Madden Planning Group provided consulting research, analysis and advice.

## II. Rationale and Authority

### Rationale

In recent years, several studies<sup>1</sup> have noted that the Bryn Mawr retail district was not reaching its full potential. Each study proposed recommendations for improvement to the retail corridor, landscaping, and the need for reinvestment. While the advantages of having Bryn Mawr station located in the center of the commercial area and easily accessible to commercial interests, educational institutions and the hospital were identified in each study, only the Bryn Mawr Master Plan addressed the need for a comprehensive revitalization strategy including the station. Each study also noted a lack of funding sources to support needed improvements. Although Bryn Mawr enjoys a relatively healthy market position, it suffers from aging and inadequate infrastructure to support a modern town center and multi-modal transportation hub. Bryn Mawr's retail core has undergone change in market position with the continued growth of competing shopping centers and retail areas and the loss of familiar operators. Redevelopment opportunities became possible due to Bryn Mawr Hospital's expansion and development activities and there is sustained support for Bryn Mawr center from public officials and the community. Business and property owners have begun to be interested in developing an organization to support the many businesses in the community. What has been lacking is a plan, an organizational structure and a dedicated financing mechanism. With the enactment of the Pennsylvania Transit Revitalization Investment District (TRID) Act, Lower Merion Township saw the potential to use the TRID structure to accomplish revitalization objectives while supporting public transit.

Much of Bryn Mawr town center is built-out. However, the expansion of Bryn Mawr Hospital and the identification of key sites for potential redevelopment, including Municipal Lot 7, Central Avenue, and the former "Verizon Lot", present an opportunity to leverage those investments to improve downtown Bryn Mawr, promote public transit and transit-oriented development. Lower Merion Township, located in Montgomery County, Pennsylvania, would like to promote revitalization and reinvestment in the Central Business District of the Bryn Mawr community. The Township has determined that the establishment of a TRID District can provide the organizational and financing framework to guide and support revitalization efforts. Using the TRID structure, Lower Merion

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<sup>1</sup> HyettPalma Economic development study, 1997; Carter Van Dyke streetscape study, 1999; Urban Land Institute Advisory Panel, 2004; Sasaki Master Plan study, 2006.

Township is positioned to take advantage of this flexible tool offered by the Commonwealth to strengthen Bryn Mawr and ensure its success in the years to come.

Following upon the preparation of the Bryn Mawr Master Plan in 2006, the Township has adopted the Bryn Mawr Village District zoning ordinance to better define and guide reinvestment in Bryn Mawr. The next step for Bryn Mawr's revitalization efforts is to develop a TRID plan.

The use of the TRID Act is advised due to the prominent role the Bryn Mawr station can play in the redevelopment of the Bryn Mawr commercial district, proposed residential development, current reinvestment in Bryn Mawr Hospital, and the availability of public and private properties adjacent or proximate to the station. Because the public property known as Lot 7 (currently used for municipal parking) would require development agreements with Amtrak and parking replacement for SEPTA commuters, TRID is a logical tool for redevelopment. Through the re-development of previously mentioned parcels, TRID can spur community revitalization and economic development and create better access to services and improved facilities for Bryn Mawr residents and workers.

### **Authority**

The Commonwealth of Pennsylvania's *Transit Revitalization Investment District Act* of 2004 authorizes public transportation agencies to "work cooperatively with counties, local governments, transportation authorities, the private sector and the National Railroad Passenger Corporation (Amtrak) and other providers of public transportation and passenger rail services to create and designate Transit Revitalization Investment Districts for the following purposes:

1. Promoting local, county and regional economic development and revitalization activities through private sector investment, reinvestment and joint development activities in conjunction with public transportation improvements.
2. Encouraging and supporting municipal and multi-municipal comprehensive plan implementation, including consistency of plans at the local, county and regional levels.
3. Stimulating public-private partnerships created by prospective development opportunities around, within or adjacent to the transit system, station areas and transit system components.
4. Establishing appropriate mechanisms to capture the real estate taxation and other values added by joint development activities for reinvestment in the transit system and local communities."

TRID legislation is provided in Appendix A.

### **III. TRID Implementation Process**

#### **Planning Phase**

Step 1 – Municipality (Lower Merion Township) and Transit Agencies (SEPTA and Amtrak) agree to work cooperatively to create TRID

Step 2 – Municipality undertakes TRID Planning Study to determine location, boundaries and rationale and value capture and financial analysis

Step 3 – Municipality and Transit Agency conduct community and public meeting(s) on TRID Planning Study

Step 4 – TRID Planning Study is revised and completed

Step 5 – Municipality and Transit Agency accept Planning Study's findings and recommendations

Step 6 – Municipality transmits Planning Study to Commonwealth of Pennsylvania for approval.

#### **Program Management Phase**

Step 7 – Municipality forms Management Entity to manage TRID implementation (in this case, Lower Merion Township will serve as the Management Entity).

Step 8 – Municipality and Transit Agency prepare project lists of Public and Transit Infrastructure Improvements, including costs, phasing and maintenance

Step 9 – Municipality and Transit Agency coordinate with other jurisdictions with real estate tax interests (Lower Merion School District and Montgomery County) on Value Capture shares, schedule and TRID Financial Plan

Step 10 – Municipality and Transit Agency hold public meeting on TRID Implementation Program improvements

Step 11 – Municipality and Transit Agency execute Agreement on roles, responsibilities, financial commitments, management entity and defined improvements

#### **Implementation Phase**

Step 12 – TRID Management Entity solicits Developer interest in select parcels

Step 13 – Development proposal accepted by TRID Management Entity and municipality

Step 14 – Planned public improvements are undertaken with TRID proceeds

Step 15 - TRID Management Entity executes Development Agreement with successful Developer, including Public Sector Improvements and Private Sector Financial or Project Commitments

Step 16 – Project construction and completion

Step 17 – TRID Management Entity administers Value Capture revenues and expenditures in accordance with approved Implementation Program

Step 18 – Amendments to Agreement or TRID Plan, as required

Source: Delaware Valley Regional Planning Commission, 2005

## IV. Public Process in Developing the TRID Plan

Table 1 displays the public participation schedule for the Bryn Mawr TRID Plan. Detailed presentations and meeting notes can be found in Appendix B.

**Table 1: Public Participation**

<b>Date</b>	<b>Presentation Name</b>	<b>Presenter</b>	<b>Forum</b>
1/18/2007	Project Initiation-Bryn Mawr TRID Plan	ERA/Sasaki	Ad Hoc Bryn Mawr Committee
3/15/2007	BMV/TRID Zoning Strategy	Sasaki	Ad Hoc Bryn Mawr Committee
4/9/2007	Bryn Mawr Community Visioning	Civic Visions	Public
4/23/2007	Bryn Mawr Community Visioning	Civic Visions	Public
4/26/2007	Bryn Mawr TRID Density & Redevelopment	Sasaki	Ad Hoc Bryn Mawr Committee
5/17/2007	BMV/TRID Value Capture Analysis	ERA	Ad Hoc Bryn Mawr Committee
5/21-22/2007	Bryn Mawr Master & TRID Plans	ERA/Sasaki	Public
5/21-22/2007	TODs & TRIDs	DVRPC	Public
6/14/2007	Zoning Workshop/TRID Boundary	Sasaki	Ad Hoc Bryn Mawr Committee
6/20/2007	Bryn Mawr TRID Planning Analysis	ERA/Sasaki	Ad Hoc Bryn Mawr Committee
7/19/2007	Zoning Workshop	Sasaki	Ad Hoc Bryn Mawr Committee
9/17/2007	Bryn Mawr Master Plan & TRID Study	Sasaki	Public
9/20/2007	Traffic Study for Bryn Mawr TRID District	Gannett Fleming	Ad Hoc Bryn Mawr Committee
9/26/2007	Public Presentation – Zoning	Sasaki	Public
10/18/2007	Bryn Mawr Zoning & TRID Traffic	Staff	Ad Hoc Bryn Mawr Committee
11/15/2007	Bryn Mawr Zoning & TRID	Staff	Ad Hoc Bryn Mawr Committee
12/13/2007	Traffic Study for Bryn Mawr TRID District	Gannett Fleming	Ad Hoc Bryn Mawr Committee
1/17/2008	BMV/TRID Zoning Strategy	Staff	Ad Hoc Bryn Mawr Committee
3/20/2008	Bryn Mawr TRID Analysis	ERA	Ad Hoc Bryn Mawr Committee
5/15/2008	Bryn Mawr TRID Analysis	ERA	Ad Hoc Bryn Mawr Committee
6/19/2008	Bryn Mawr TRID Analysis	ERA	Ad Hoc Bryn Mawr Committee
9/18/2008	Bryn Mawr TRID Analysis	Staff	Ad Hoc Bryn Mawr Committee
11/20/2008	Bryn Mawr TRID Analysis	ERA	Ad Hoc Bryn Mawr Committee
2/15/2009	Bryn Mawr TRID Plan	ERA	Ad Hoc Bryn Mawr Committee



2/19/2009

Bryn Mawr TRID Analysis

Staff

Ad Hoc Bryn Mawr  
Committee

Source: Lower Merion Township, April 2009

## V. TRID Boundary

The first step in the TRID process was to establish the proposed boundary for the district. In a series of work sessions, the criteria and the appropriate delineation were discussed, with several modifications over the course of the work. The criteria remained constant, but the initial boundary recommendation encompassed several residential areas including the Montgomery Avenue apartment buildings north of the tracks. The boundary was eventually reduced to focus on the core commercial and station area in Bryn Mawr. The TRID boundary rationale and description is detailed in Appendix C.

All of the proposed re-development parcels in the proposed TRID District are within a one-half mile radius or touch this one-half mile boundary. In addition, all properties are within Lower Merion Township. As illustrated in Figure 1, the TRID boundary focuses on the areas around the Bryn Mawr train station that meet the criteria listed below:

**Distance:** Areas within one-half mile of the Bryn Mawr SEPTA R5 station or parcels that touch this line, in accordance with the TRID legislation. This distance could have been exceeded with justification via this study as provided for in the Act.

**Jurisdiction:** Areas within Lower Merion Township which is the focus of this effort.

**Continuity** – Delineates a district that is a complete and identifiable area, to enable value capture funds to be used for capital improvements and transit infrastructure.

**Development Potential:** Encompasses vacant land and underutilized properties that have potential for future private redevelopment and significant tax value capture.

- Lot 7 (currently used as public parking for businesses and visitors, SEPTA commuters and leased spaces);
- Central Avenue, including publicly-owned Lot 10 and privately-owned lots (to be privately-developed).
- Two privately-held lots (1 acre “Barone site” and 1.4 acre “Verizon site” referenced in the master plan) located on Lancaster Avenue.

**Renovation Potential:** Encompasses buildings that have significant renovation potential (which also provides tax value capture), such as the commercial shops along Lancaster Avenue.

**Capital Improvement Need:** Areas that will benefit from public improvements that can be funded through the TRID value capture mechanism. Proposed improvements include sidewalks, renovated

streets, parking structures, utilities, signage, and improved and accessible station facilities.

Lancaster Avenue and Bryn Mawr Avenue are priority areas for improvements, along with other cross streets in the area and the underpass beneath the rail line.

**Institutions:** Encompasses institutions that may redevelop all or part of their campuses for private development or spin-off economic development, such as Bryn Mawr Hospital townhouses.

Institutions that do not meet these criteria and thus do not contribute to the tax base and value capture are not included (Bryn Mawr College, Baldwin School, Shipley School, and church campuses) in the proposed TRID district.

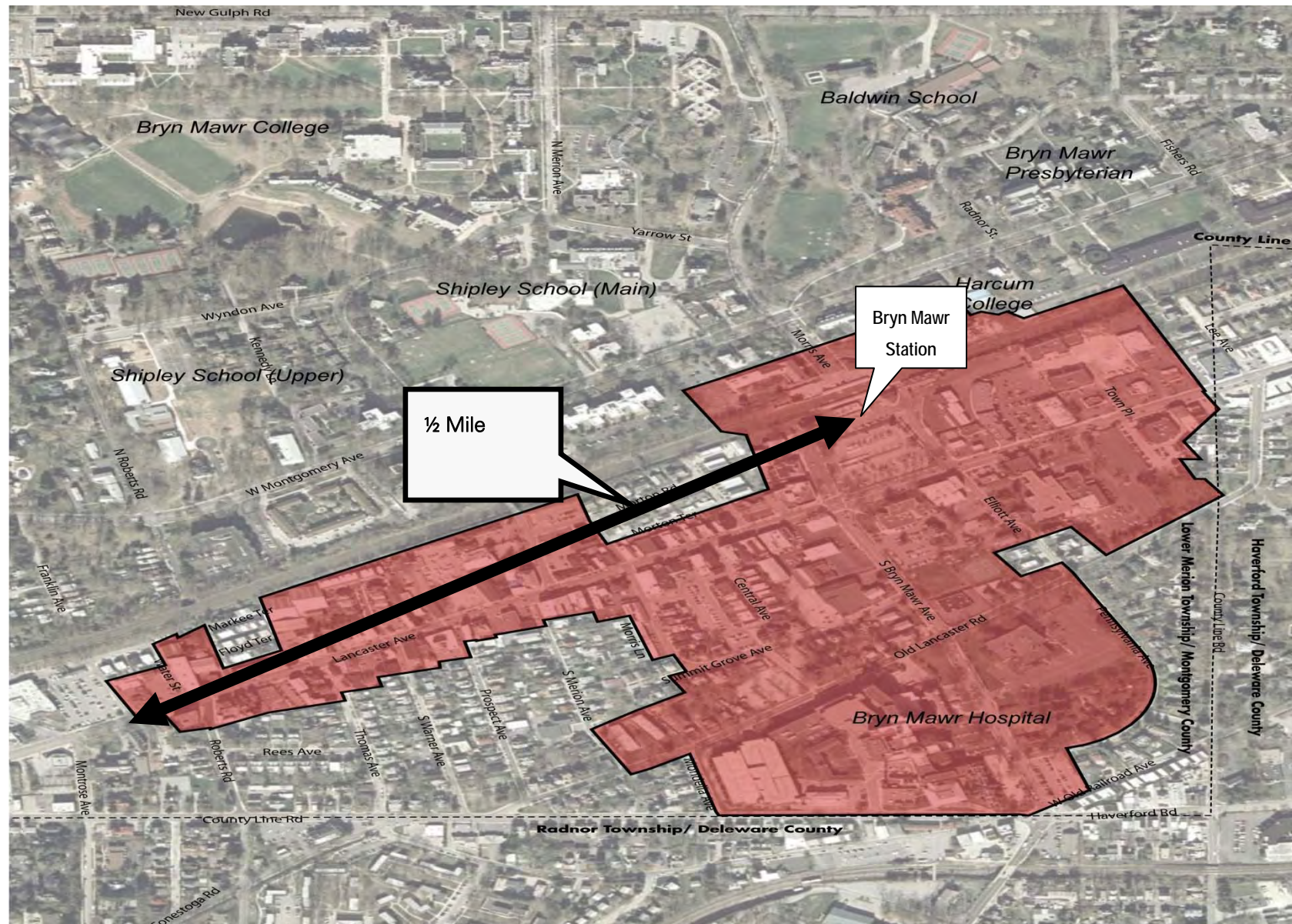


Figure 1: TRID Boundary

## **VI.Existing Conditions**

The Bryn Mawr TRID District today is characterized by a concentration of small shops along Lancaster Avenue, a concentration of high-quality educational institutions, highly-regarded Bryn Mawr Hospital and the center of a successful suburban community on the Main Line. Bryn Mawr Station is an integral part of the history and atmosphere of Bryn Mawr. Although Bryn Mawr has a reputation as an affluent suburban community, the attainable housing near the station has helped the village retain a mix of income levels. The compact development pattern has kept Bryn Mawr a walkable community, augmented by the availability of rail transit service.

However, there are gaps in the village fabric, especially around the R-5 Bryn Mawr train station. A surface parking lot, Municipal Lot 7, occupies the most valuable land from both a real estate and Town Center symbolic point of view at the heart of the village, fronting the train station and creating a point of arrival into Bryn Mawr proper along Lancaster Avenue. The character and mix of retail along Lancaster Avenue does not live up to the tremendous economic potential of this location. The overall character of the street does not inspire pedestrian activity consistent with transit oriented development (TOD).

### **Context**

The village center is surrounded by transit-friendly, compatible uses that could foster greater pedestrian activity, transit ridership and a more vibrant retail district. Bryn Mawr College, Harcum College, the Baldwin School, and the Shipley School are all within a five to ten minute walk of the train station on the north side of the tracks. The Bryn Mawr Hospital lies adjacent to the village center on the south side, a part of the community since the Civil War and currently employing approximately 1,800 people with expansion plans. Compact neighborhoods surround the village center in the areas south of the railroad tracks, and high density housing lines Montgomery Avenue on the north side.

Figure 2 provides a regional context for the area.

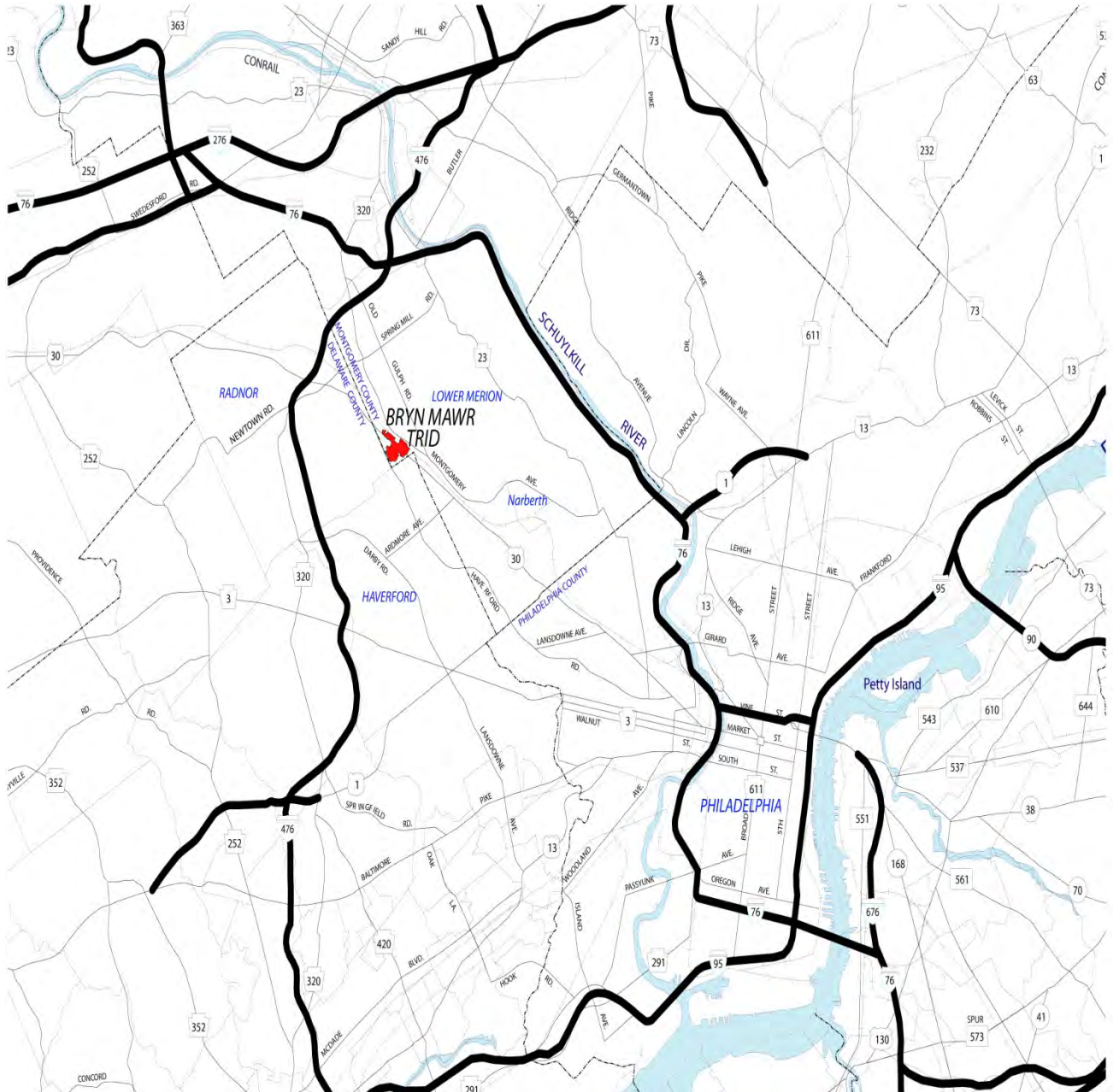


Figure 2: Regional Context

## Pedestrian Environment

Although historical development patterns have kept Bryn Mawr scaled for pedestrians, the condition of the streets and sidewalks, some of the current land uses, and a number of barriers hamper access and walkability.

The area on the north side of the station is dominated by automobile activity, including station drop-off /pick-up and surface parking. The Morris Avenue underpass near the



**Figure 3: Railroad Corridor Crossing**

The Morris Avenue underpass near the station is difficult for pedestrians to access because of unsafe street crossings and limited sidewalks at the north and south approaches. A narrow, dimly lit pedestrian underpass also exists at the station.

The only other rail crossings in the TRID District are the recently upgraded bridge at Merion Avenue and the underpass at Roberts Road. South of the station, the vehicle circulation is confusing and lacks accommodation for pedestrians. Lancaster Avenue features relatively fast moving traffic and narrow sidewalks given its role as a major arterial carrying through-traffic within the larger transportation system. This conflicts with its dual function as a major local shopping street in Bryn Mawr.

The pattern of development in the last several decades has been suburban in character as seen in the area east of the station and on parts of Lancaster Avenue. In these areas, the conditions are not conducive to walking due to the extensive curb cuts, surface parking, and inactive building facades.

## Parking

Within the TRID District, 762 parking spaces exist in public parking lots, with 192 operated by SEPTA and the remaining operated by the Township of Lower Merion. Table 2 lists the location and number of publicly-available parking in the area.

Other significant parking within the TRID District is operated by Bryn Mawr Hospital in two garages and is estimated to be 1,906 additional spaces.

On-street parking is estimated to be 567 spaces. A number of small private surface lots are scattered along Lancaster Avenue, Bryn Mawr Avenue, and Merion Road. Figure 4 illustrates the existing parking within the TRID District.

**Table 2: Existing Parking, TRID**

<b>Lot</b>	<b>No. of Spaces</b>
Municipal Lot 7	188
Municipal Lot 8	18
Municipal Lot 9	25
Municipal Lot 10	118
Municipal Lot 11	49
Municipal Lot 14	65
Municipal Lot 19	25
Municipal Lot 22	32
Ludington Library	50
SEPTA-2	46
SEPTA-3	146
Bryn Mawr Avenue Garage	750
Old Lancaster Avenue Garage	1,156
<b>TOTAL</b>	<b>2,668</b>

Source: Township of Lower Merion, 2009



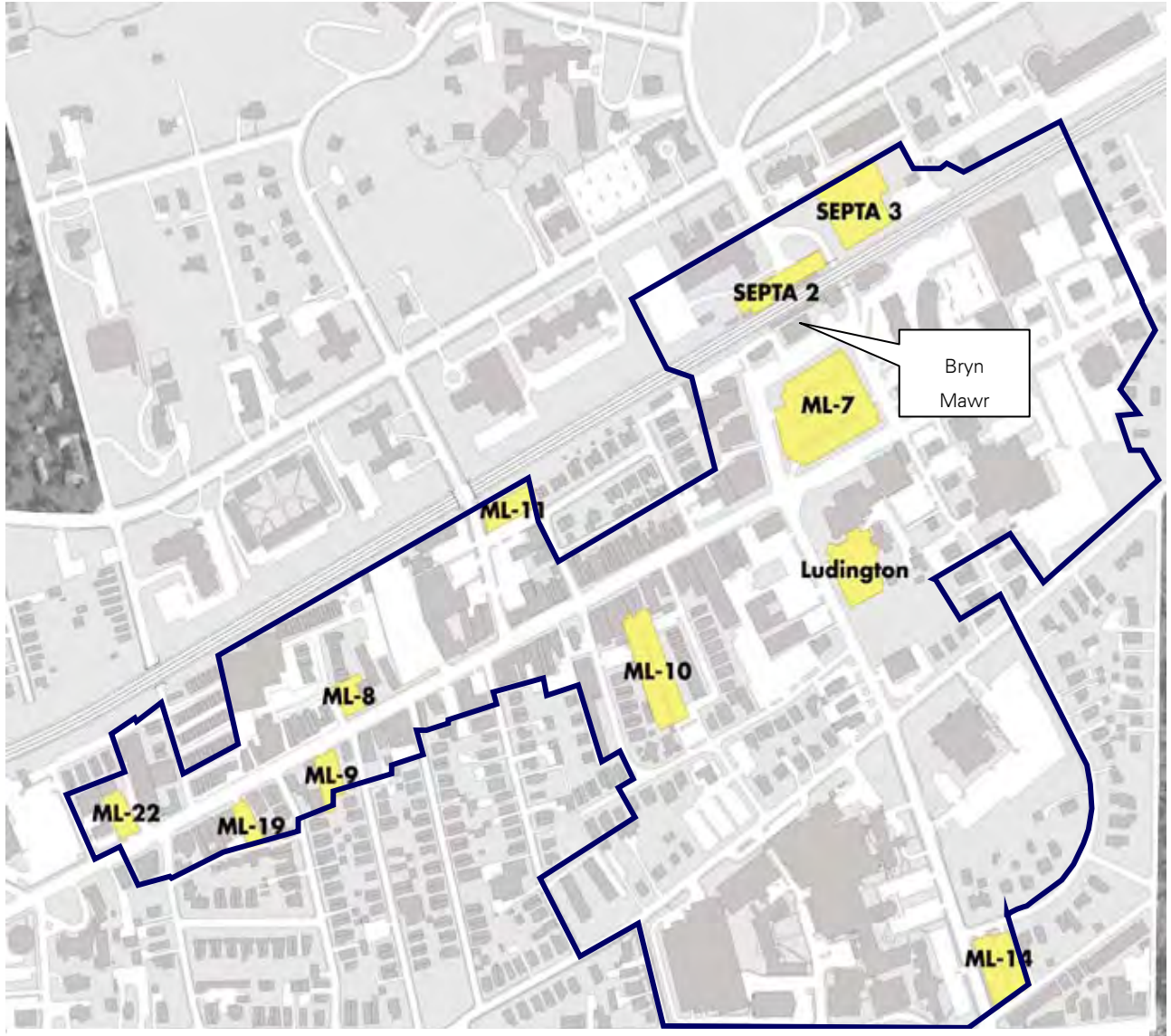


Figure 4: Existing Parking

## Community Facilities and Historic Resources

The Lower Merion Township Historic Ordinance defines different classes of Historic Resources (Ordinance 3560, Chapter 88). Class I properties generally include sites and buildings eligible for listing, listed on the National Register or otherwise designated historic by the Secretary of the Interior. Class II properties generally include those historic resources listed in the Lower Merion Township Resource Inventory not otherwise listed as Class I.

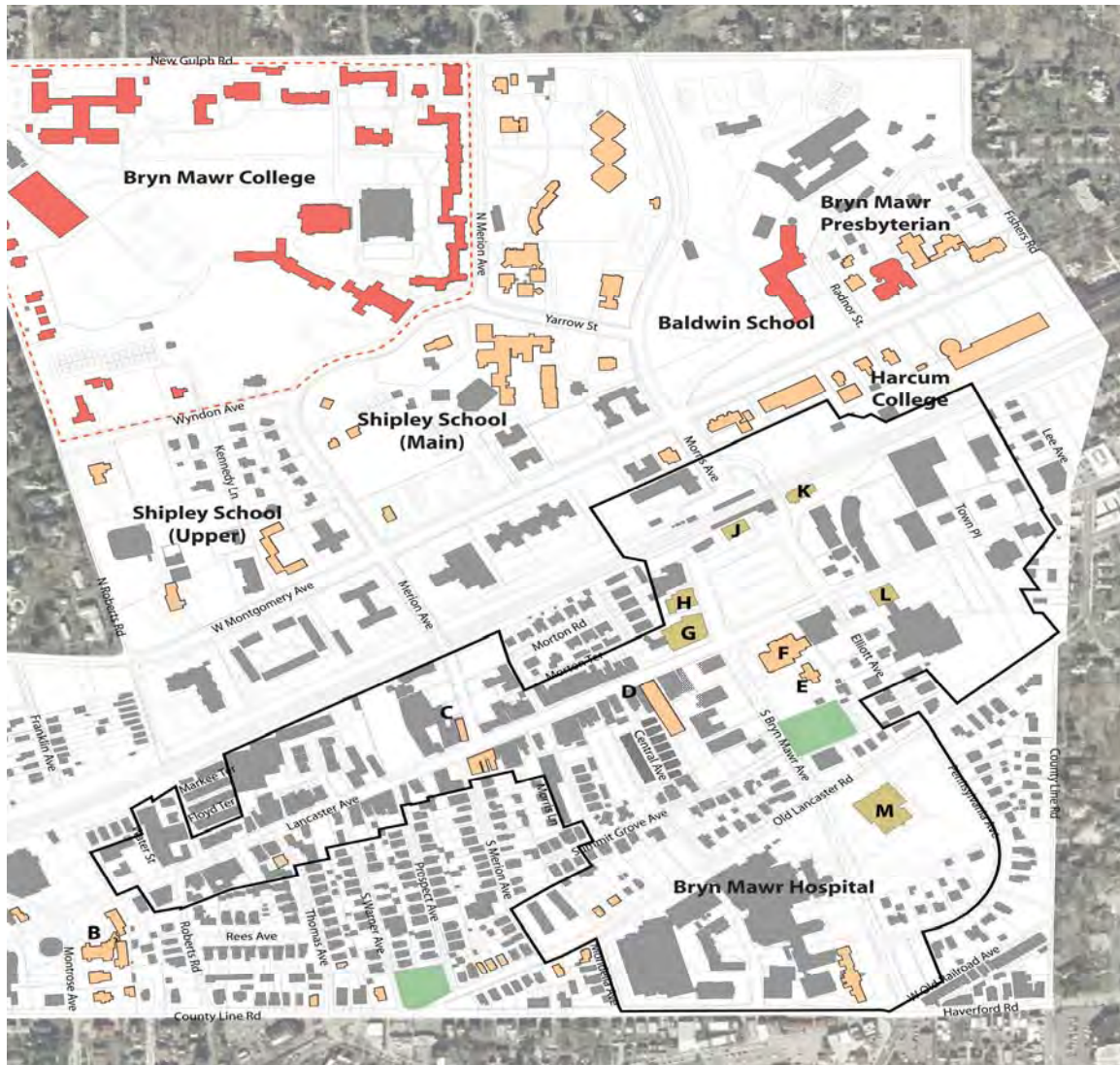


The TRID District encompasses a number of Class II historic structures. Many of these also serve as community facilities in the heart of Bryn Mawr village. There are a few Class I structures in the proposed TRID district as well, notably in the commercial core.

Municipal Lot 7 marks the crest of the hill on Lancaster Avenue and has been the historic center of the village for many years. Around this square, civic uses include the Ludington Library, which is a Class I historic property and the central library for the Township; the post office; and the train station, as well as the prominent Bryn Mawr Trust building.



Behind the library, the War Memorial building is a Class I historic resource that is home to the senior center. The War Memorial is part of the Bryn Mawr Community Center, which also features a park area with tennis courts, perennial gardens, gazebo, and an expanse of lawn. The Bryn Mawr Film Institute (BMFI) is a Class 2 resource individually listed on the National Register of Historic Places.



**Figure 5: Community Facilities and Historic Resources**

- Class 1 Historic Resource
- Class 2 Historic Resource
- Other buildings of interest

Along Lancaster Avenue, other Class II properties include the Bryn Mawr Fire Station, along with two other commercial/residential properties. The Gerhard Building, the original structure of the Bryn Mawr Hospital, is a distinctive feature near the Five Points intersection at Bryn Mawr Avenue and County Line Road but is not a listed structure. The Class I properties in the area are north of the TRID District at Bryn Mawr College, Baldwin School, and Bryn Mawr Presbyterian Church. Figure 5 outlines the community facilities and historic resources within the TRID District.

## Infrastructure

Since the Bryn Mawr Village is located on a plateau that straddles two watershed areas. The Philadelphia Water Department reports that everything north of Lancaster Avenue flows into tributaries of the Schuylkill River. The Schuylkill River Watershed drains approximately 2,000 square miles. Areas to the south of Lancaster Avenue flow into the Darby-Cobbs Creek Watershed, a smaller drainage area of approximately 80 square miles. Both drainage basins ultimately flow into the Delaware River. Figure 6 illustrates the existing surface drainage patterns and pervious area within the TRID District.

Within the 105-acre proposed TRID District, buildings account for approximately 25 to 30 percent of the surface area, while streets, parking, and sidewalks account for 45 to 50 percent of the surface. Pervious areas, such as lawns and other green areas are estimated to be approximately 25 percent of the total surface area.

Sanitary sewers are the primary infrastructure concern for the area. Infiltration and inflow of existing pipes is a concern in many areas of the Township and improvements have included both replacement and repair. Over the last two years, sanitary sewer projects have included the replacement of 7,900 linear feet of the Roberts Road line.

The Township funded storm water system improvements as part of the recent Township-wide Storm Water Program. In August/September 2007, approximately 7,900 ft. of sanitary sewer line was replaced on N. Roberts Road through the Township's Capital Improvement Program. The cost of the project was \$515,401.18. The sanitary sewer replacement began from an existing sanitary manhole within the eastbound travel lanes of Montgomery Avenue to a sanitary manhole in the westbound travel lanes of Lancaster Avenue. The project also included cured-in-place pipe lining (2-lengths) from a manhole in Lancaster Avenue to an existing manhole in South Roberts Road. N. Roberts Road was then rotomilled and paved from Lancaster Avenue to Montgomery Avenue.

Water is provided by a private utility, Aqua America, Inc., which is headquartered in Bryn Mawr and is one of the Township's most prominent corporations and a major employer in the TRID district. Aqua America is making improvements to water infrastructure throughout the service area.



Figure 6: Existing Surface Drainage and Pervious Areas

## Existing Land Use

As shown in Figure 7, the TRID District encompasses primarily commercial land uses and the institutional hospital area within the Bryn Mawr village, along with a small number of civic uses serving the village. A few residential properties are included based on the potential for redevelopment and/or reinvestment.



Residential districts surround the TRID District on all sides making for a compact mixed-use center. The extensive school and college campuses noted below lie north of the TRID District beyond Montgomery Avenue. A total of 24,000 students are enrolled at colleges and universities along the Main Line in this general vicinity, including Bryn Mawr College, Harcum College, American



College, Rosemont College and Haverford College. Villanova University students, faculty and staff also frequent downtown Bryn Mawr. The Baldwin and Shipley Schools are also nearby.

Most of the retail, restaurant and other commercial uses in the TRID District have frontage directly on Lancaster Avenue, Merion Avenue, or near the station area. On the east side of the district, the Town Place complex includes a mix of larger footprint retail, restaurant, and office uses. Other significant office employers are located in the office building just north of the station and at Aqua

America on Lancaster Avenue. Small professional offices and other businesses are located throughout the district in upper stories and on side streets such as Bryn Mawr Avenue, Elliott Avenue, and Old Lancaster Road.

The Bryn Mawr Hospital has historically been concentrated on the 15-acre “trapezoid” defined by County Line Road, Old Lancaster Road, Bryn Mawr Avenue, and Mondella Avenue. The hospital has existed in the community since the Civil War and today has approximately 1,800 employees and a total of 283 beds. Currently, the hospital is in the process of expanding its facilities to the east

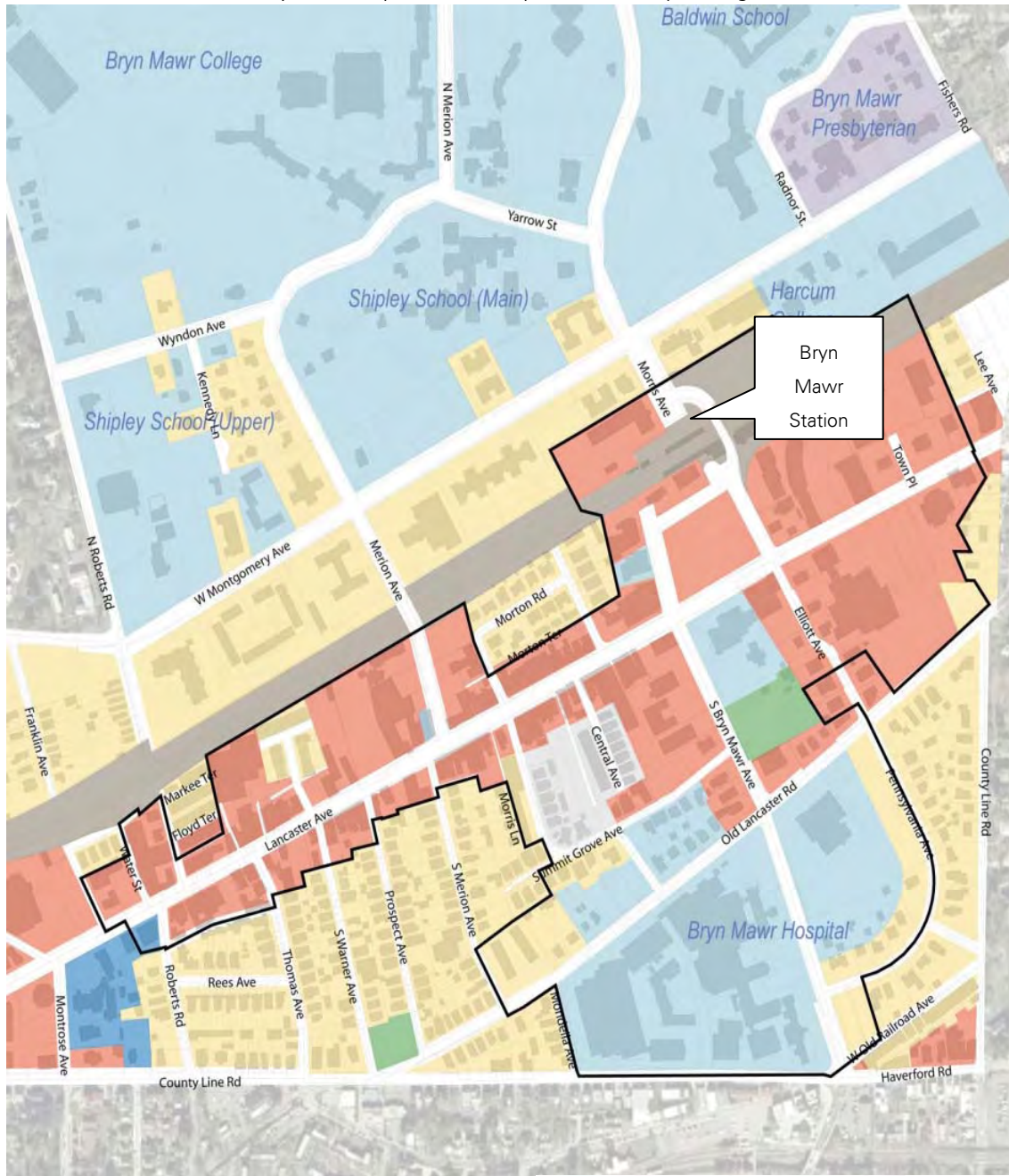


Figure 7: Existing Land Use

- Commercial
- Church
- Residential
- Park
- Institutional
- Vacant Land



across Bryn Mawr Avenue and to the north across Old Lancaster Road. Current development plans call for three medical office buildings, two parking garages, and new residential townhouses along Pennsylvania Avenue. The first parking garage opened to the public in January 2009.

Government uses within the TRID District include the post office on Bryn Mawr Avenue near Lot 7, the central library of the Township in the Ludington building, the senior center in the War Memorial Building and Bryn Mawr Community Center, and the fire station at the corner of Lancaster Avenue and Merion Avenue. The non-profit Bryn Mawr Film Institute occupies a key location near the center of the village.

A significant amount of land in the TRID District is devoted to surface parking. The three largest public parking lots are Municipal Lot 7 in the center of the village (188 spaces), the SEPTA lot north of the tracks (146 spaces), and Municipal Lot 10 between the hospital and the shops on Lancaster Avenue (118 spaces).

## Zoning

As a part of the TRID process, the Township of Lower Merion embarked on a rezoning effort for the Bryn Mawr village. The previous zoning, illustrated in Figure 8, was not compatible with the historic character of the village and made it impractical for new development or redevelopment to occur. The requirements were not conducive to creating and enhancing the compact village center that exists today or transit-oriented development, but rather took on a suburban zoning character. The patchwork of zones reflected a layered history of zoning changes over time, but was not practical for carrying out some of the key recommendations in the 2006 Bryn Mawr Master Plan. Most recently, a separate zone – the Bryn Mawr Medical District - was created for the hospital area to enable

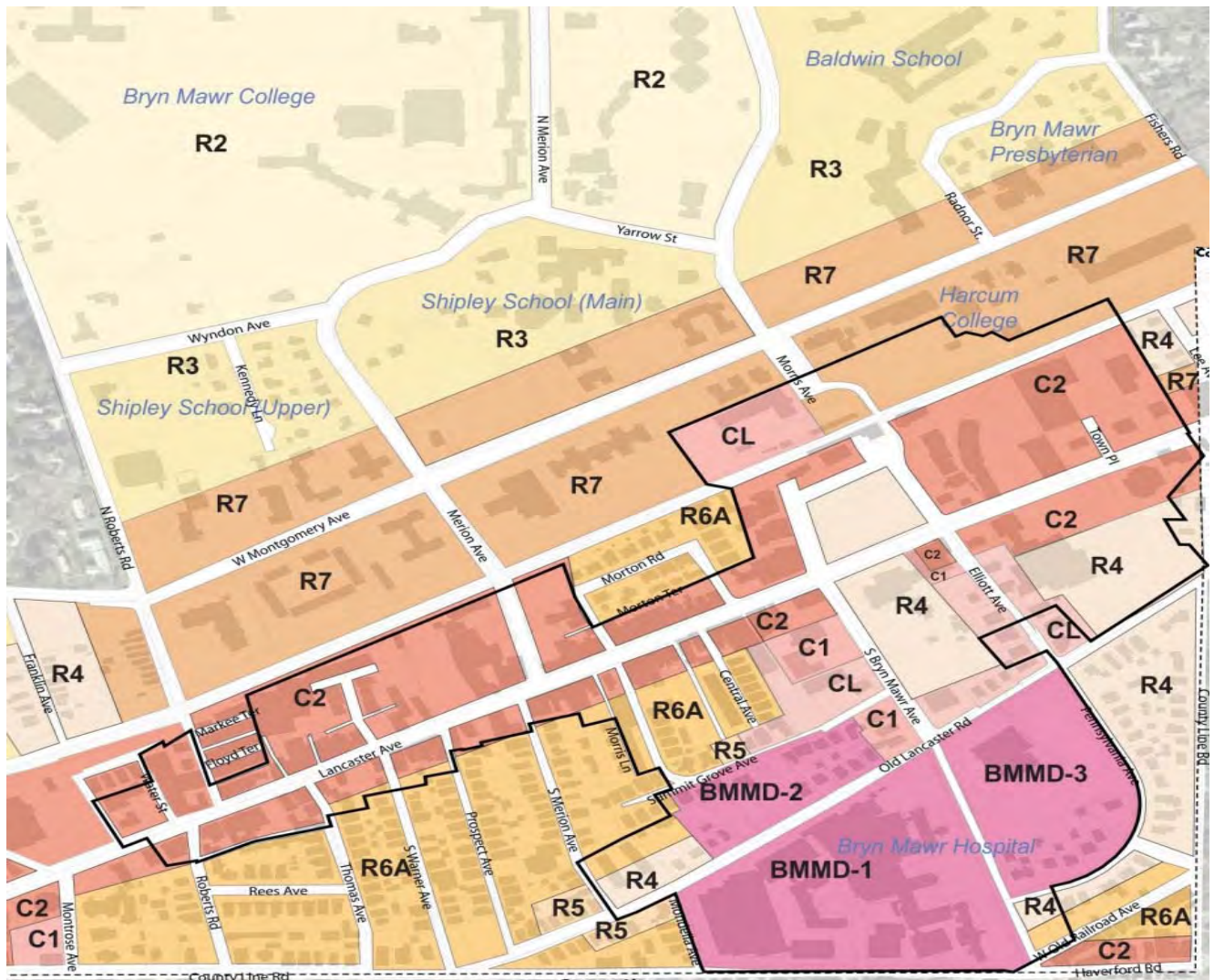


Figure 8: Previous Zoning (prior to 2008)

expansion and renovation.

During a 15-month process that began in March 2007, the Township worked closely with the *Ad Hoc* Bryn Mawr Committee, which had been appointed by the Township Board of Commissioners to guide redevelopment efforts and oversee the Master Plan process. In reviewing and discussing zoning recommendations, the group's objective was to come to consensus on the best way to tailor new form-based zoning to the unique character of Bryn Mawr and its future potential. The zoning analysis considered four key criteria – use, density, form, and parking – and compared different approaches offered by the existing Township zoning, the Ardmore Mixed Use Special Transit (MUST) District overlay zoning, the Montgomery County Model Zoning Ordinance, and the Congress for New Urbanism (CNU) SmartCode. The proposed Bryn Mawr Village zoning was the topic of discussion at a number of public meetings and other community forums, prior to discussion and adoption by the Board of Commissioners in June 2008.

The Bryn Mawr Village Zoning District was enacted as a new district within the Township. Within the Village District, four separate zones respond to special considerations for concentrating greater density around the train station and sensitivity to surrounding neighborhood uses.

The specific objectives of the ordinance, which are listed below, are consistent with Transit-Oriented Development and the objectives of the TRID program.

- 1) Encourage economic development while maintaining the traditional main street environment.
- 2) Protect existing residential neighborhoods.
- 3) Establish a walkable community by promoting pedestrian-oriented streets and pedestrian scale buildings.
- 4) Encourage lively, human-scaled activities within a mix of residential, commercial, cultural and other uses separately or in the same building.
- 5) Encourage a vibrant street life by encouraging active ground floor retail, and discouraging certain uses on Bryn Mawr and Lancaster Avenues.
- 6) Promote the reuse of existing structures in a manner that maintains the historic and visual character and architecture and building scale of the neighborhood.
- 7) Reduce auto dependency by promoting transit ridership, bicycling, and walking.
- 8) Accommodate parking in a convenient and unobtrusive manner and encourage shared parking, where possible.

9) Promote residential uses in upper stories.

10) Concentrate commercial and retail uses on the ground level of mixed-use buildings.

The new zoning allows for greater flexibility in the mix of uses and their location within the village. The dimensional requirements capture the form of the current compact village, and additional density is allowed as a bonus in the key redevelopment areas close to the station, notably Municipal Lot 7. It also allows for design and greening standards.

The new zoning code is included in Appendix D and illustrated in Figure 9. Figures 9 and 10 visualize the scale of the new development; Figure 11 shows the new Bryn Mawr Village District zone map.



***Figure 9: New development will be in scale with existing buildings.***



***Figure 10: Infill development will contribute to the economic vitality of the district.***

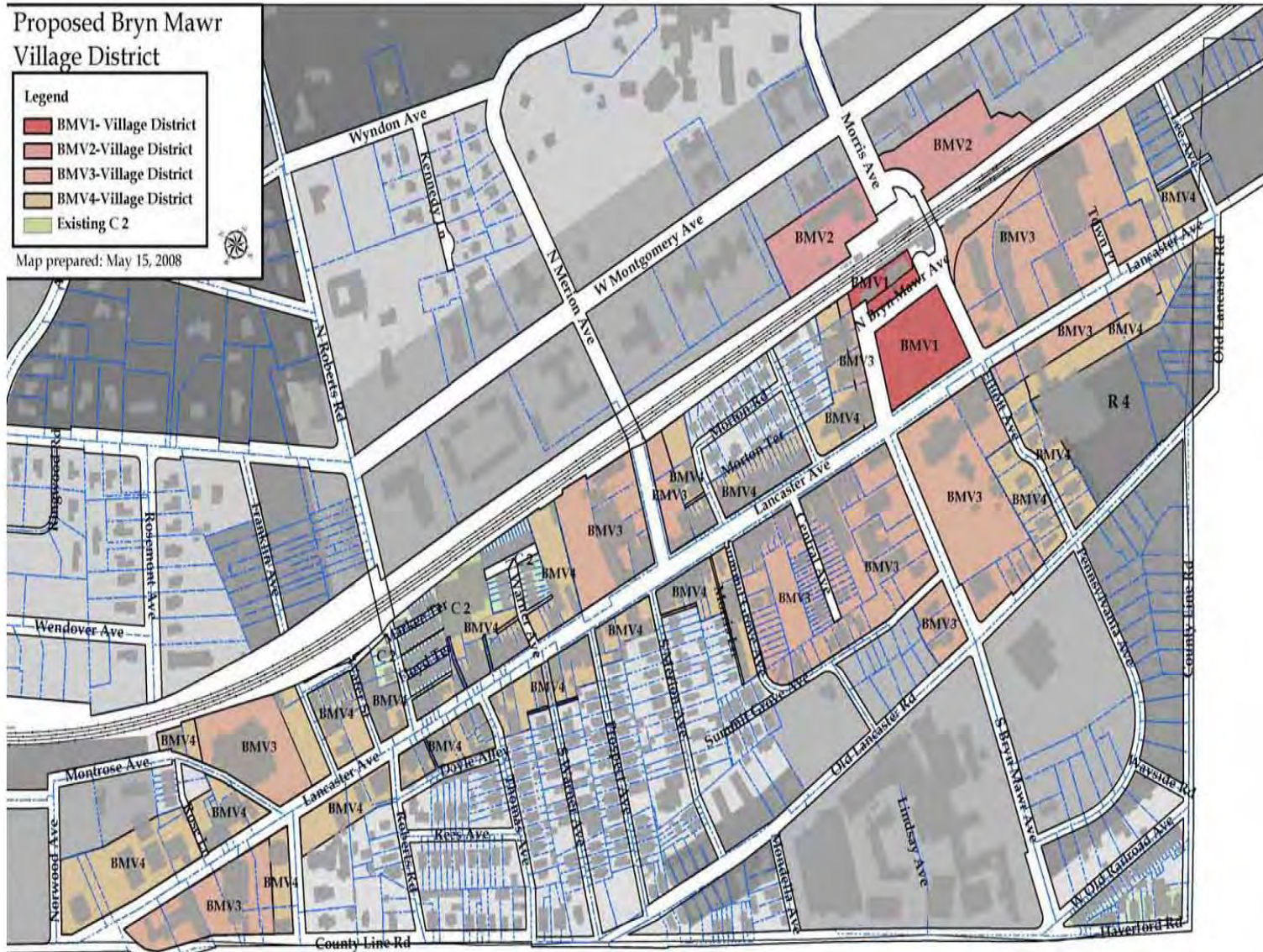


Figure 11: New Bryn Mawr Village Zoning

## Reinvestment and Redevelopment Potential

Bryn Mawr has tremendous potential for reinvestment and redevelopment, taking into consideration both short and long term horizons. As the basis for the TRID, the Bryn Mawr Master Plan identified a number of key sites for redevelopment along with priority capital improvement projects to be accomplished within the 1 to 5-year, 6 to 10-year, and 11 to 20-year time frames.

Reinvestment is a primary goal for the late 19<sup>th</sup> and early 20<sup>th</sup> century commercial buildings that line Lancaster Avenue. These buildings accommodate an array of unique shops, feature distinctive architectural elements, and together form the character of the compact walkable village. A number of single-story, more recent commercial buildings along Lancaster Avenue could be redeveloped over time by private owners to take advantage of the prime real estate in the area, ultimately achieving a better fit with the surrounding character.

Notable redevelopment areas in the TRID District are surface parking areas and other underutilized properties. Redevelopment is more likely to occur on properties that are in public and institutional ownership and are large enough for infill projects, especially if the land is already assembled. Some privately held properties may also be candidates for private redevelopment. There are two areas north of the railroad track zoned Village Zoning "V2" that are eligible for *limited* development. South of the tracks improvements include a proposed rail passenger parking deck and road improvements targeted for investment.

The most prominent redevelopment site is the two-acre Municipal Lot 7 in the center of the village. The property is owned by the Township but has a deed restriction in favor of Amtrak, the successor to the Pennsylvania Railroad. Changes to the use of this property from municipal use to commercial or residential uses would require Amtrak's cooperation and agreement. The development of Lot 7 is likely to entail the development of additional parking on the large SEPTA lot in order to accommodate displaced business and rail passenger parking.

In accordance with the Bryn Mawr Master Plan, other key properties for redevelopment are the Central Avenue area owned by the Bryn Mawr Hospital, Lower Merion Township (Municipal Lot 10) and the frontage of Bryn Mawr Avenue connecting the Village center to the hospital by various private owners. The Central Avenue area has been largely assembled by the hospital in the last several years and includes properties along Summit Grove Avenue, Central Avenue, and Old Lancaster Road. The Township retains a key property in this area, which is currently used for public parking (Municipal Lot 10). The Bryn Mawr Film Institute ("BMFI") land ownership and expansion plans are another important consideration for the redevelopment potential of this area.

The properties along the frontage of Bryn Mawr Avenue are privately owned but the long-term redevelopment of these low-rise suburban structures represents some of the greatest potential for



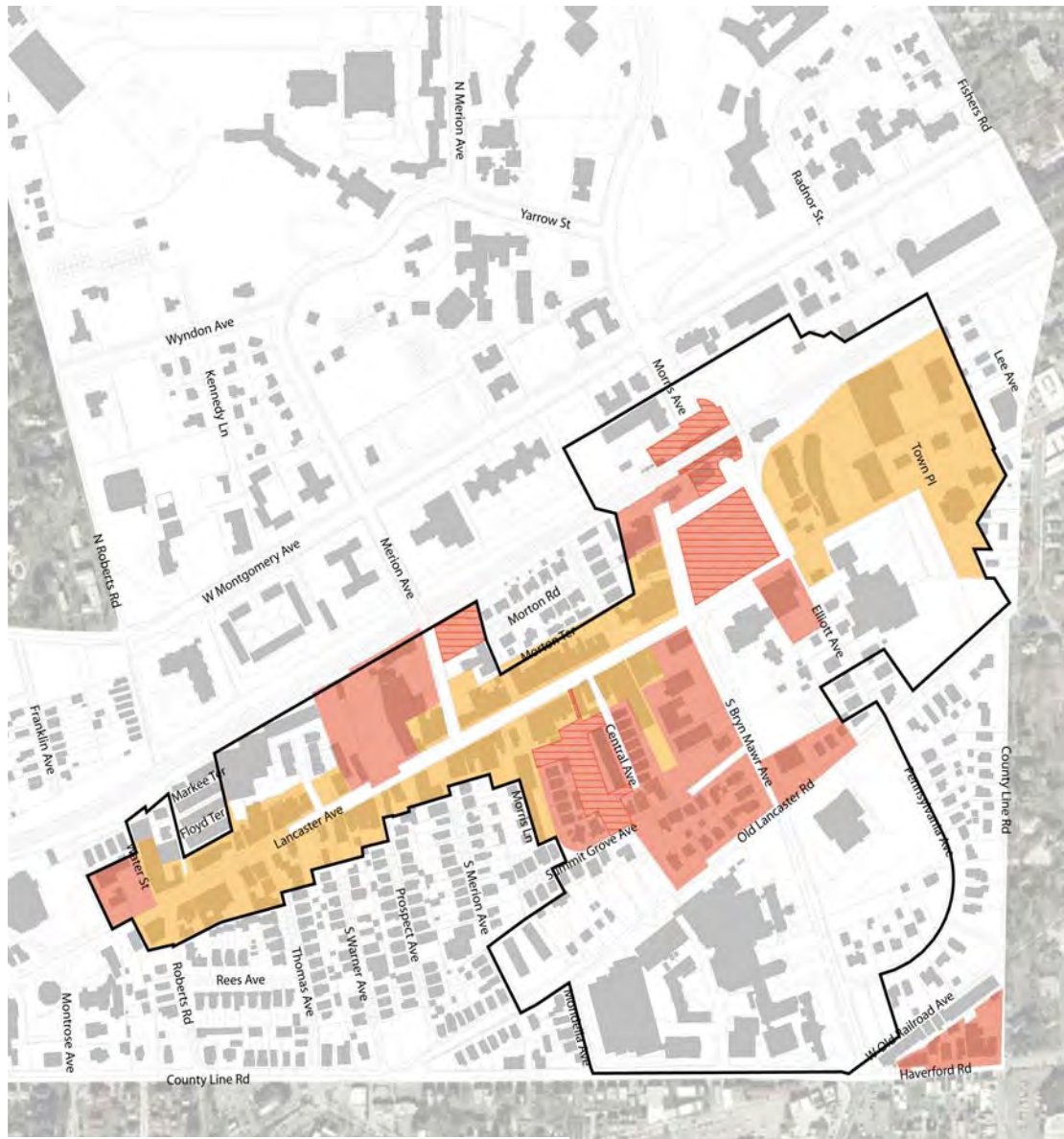
**Figure 12: Verizon Lot**

invigorating the village center and strengthening the connections between the hospital and the institutional, retail and residential districts to the north.

Another key redevelopment site is the former Verizon facility and adjacent properties on Lancaster Avenue, three blocks west of Lot 7, which could be assembled into a two-to-three-acre site.

Verizon actively used this facility for truck parking, storage, and service, and previously could not sell the property without relocating these necessary functions somewhere close by. This 1.4 acre property has recently sold and could be available for redevelopment sooner than previously thought. An adjacent use is currently a car wash. In the long run, however, the value of this prime frontage could lead to relocation and redevelopment by the private sector.

Figure 13 illustrates the available development sites.



**Figure 13: Available Development Sites and Ownership**

- Primary Redevelopment Opportunity
- Public or Railroad Ownership
- Mixed-Use Renovation/Infill Opportunity



### Proposed Land Use

In the future the TRID District will remain a mixed-use village center, but will be enhanced by new investment and improvements to the public realm. The potential for significant new redevelopment and infill is likely to be concentrated on the key sites identified in the 2006 Bryn Mawr Master Plan, illustrated in Figure 14.

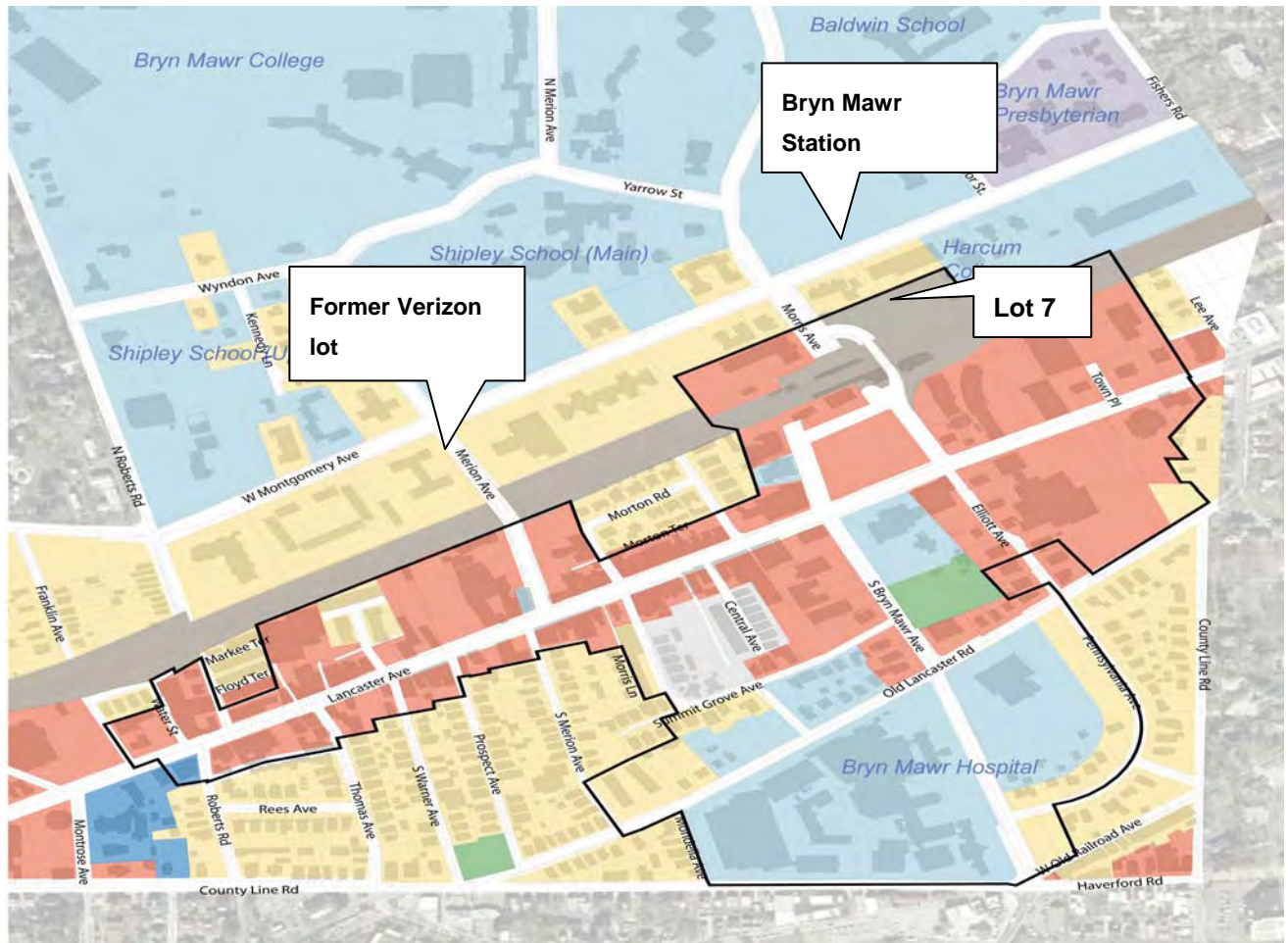


Figure 14: Proposed Land Uses

- Commercial
- Church
- Residential
- Park
- Institutional
- Vacant Land

As some of these sites are privately held, the improvements to public infrastructure made possible through the TRID will be a catalyst for new investment. New uses are expected to be a combination of medical office, higher density housing, ground floor retail, a potential hotel, and structured parking to support these uses. The specific allowed uses are contained in the new Bryn Mawr Village Zoning Ordinance.

The potential for long term development within the TRID District, illustrated in Figure 15, was presented in the 2006 Master Plan, which suggested a mix of uses on key sites.

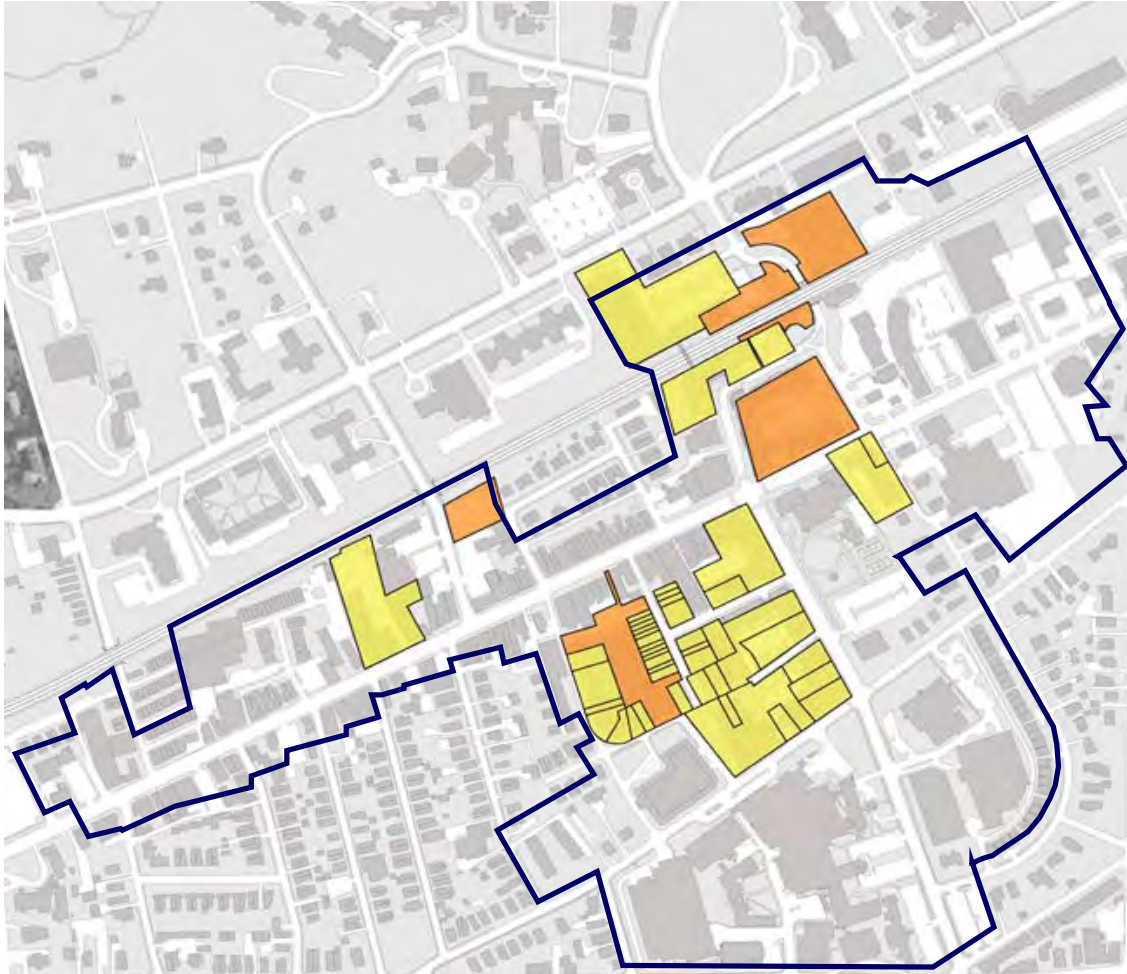


Figure 15: Potential long term development sites

- Private / institutional parcels
- Public/RR parcels

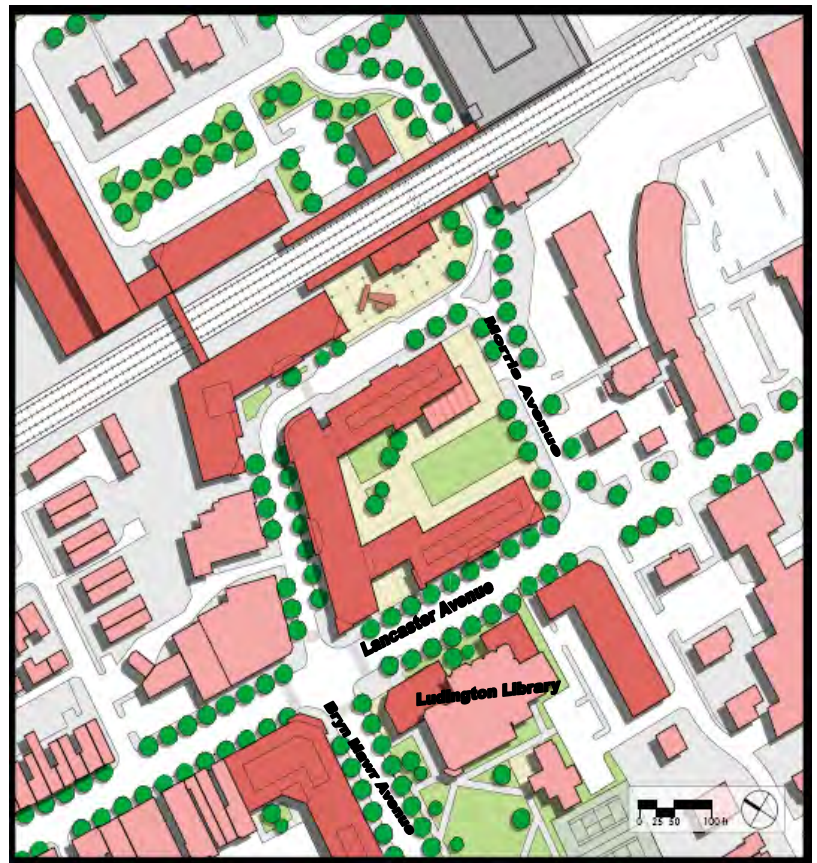
The Bryn Mawr TRID District captures the core area of this important Main Line village, which grew up around the train station. In the future, infill and redevelopment that is sensitive to the village character will reinvigorate the station and surrounding areas. New pedestrian-oriented activity will help support existing retail, restaurants, and the BMFI.

This vibrant mixed-use center will attract visitors as well as residents who already live, work, and study within walking distance of the village, and provide a high quality of life for all Township residents who can benefit from these amenities. A redevelopment program presented in the Bryn Mawr Master Plan document included a mix of uses and estimated square feet for new or redeveloped space shown in Table 3. The Master Plan’s proposed redevelopment of Lot 7 is illustrated in Figure 16.

**Table 3: Proposed Future Uses**

Use	Floor Area (gsf)
Retail/Restaurant	166,600
Residential/Hotel	679,200
Office	185,400
Library Expansion	7,700
Theater Expansion	7,500
Transit Facilities	5,200
<b>Total</b>	<b>1,051,600</b>
<b>Net New Parking</b>	<b>1,600 spaces</b>

Source: Bryn Mawr Master Plan, 2006



**Figure 16: Proposed Lot 7 Redevelopment Site**

## Property Availability

While much of the area is at full build-out, however some key development or redevelopment sites were identified during the master planning and TRID planning processes.

### Lot 7

Lot 7, located at the site of a former town green, is currently owned by Lower Merion Township. The Township received this property from the Pennsylvania Railroad, now Amtrak, with certain use restrictions and a potential reversion provision. Development of this property for anything other than a municipal use would require agreement with Amtrak. The redevelopment of Lot 7 can serve as a catalyst for transit-oriented development in downtown Bryn Mawr. The proposed Bryn Mawr master plan and TRID plan suggest replacing current parking on Lot 7 with parking additions at the commuter lot to allow Lot 7 to be used for mixed use development compatible with the Village Zoning development criteria.

### SEPTA Commuter Lot

The plan identifies the potential for the development of a parking garage on the north (outbound) side of the rail line, proposed for land owned by Amtrak and leased by SEPTA. This site could be developed in a *limited* fashion compatible with the Village 2 zone.

### The “Verizon Lot”

The “Verizon Lot” on Lancaster Avenue is privately-owned and was recently sold to a developer. With frontage on Lancaster Avenue, this lot has significant redevelopment potential that will increase value and revenue potential for the new owners. The submitted Bryn Mawr Master Plan and TRID plan identified the Verizon Lot for potential mixed-use (retail/office or retail residential). The TRID plan uses a retail and office mix in the estimated property value capture calculations for this site.

### Central Avenue

In the Bryn Mawr Master Plan and the TRID plan, the development of the Central Avenue area is proposed as a combination of public land (municipal parking) and privately-held (Bryn Mawr Hospital) land, which could be developed as a public/private partnership requiring development agreements between the two entities. This redevelopment opportunity is one of the largest redevelopment parcels envisioned in the plan. By developing these properties to take advantage of the location near the hospital, downtown Bryn Mawr and the Bryn Mawr station the owners may be able to realize a considerably greater value and advance the vision of a walkable, accessible and sustainable Bryn Mawr village center.

## VII. Economic Profile

In order to assess demographic statistics and economic trends that are relevant to the TRID Planning Study, ERA analyzed Bryn Mawr’s primary and secondary market areas, which are illustrated in Figure 17. Market area boundaries were largely determined by existing consumer patterns, household income patterns, traffic flow, and professional experience and interviews with persons familiar with the area.



**Figure 17: Bryn Mawr Market Areas**

As shown in Table 4, population growth in the study area is almost negligible, with the population in the primary market remaining flat between 2000 and 2008. The population in the primary market is expected to remain flat through 2013, only increasing by 35 residents.

Growth in the secondary market, though relatively flat, is occurring at an increasing rate, with a Compound Annual Growth Rate (CAGR) of 0.07 percent between 2000 and 2008 and projected to grow 0.12 percent in the next five years. Population growth in the Commonwealth is occurring at a faster rate than in both the primary and secondary markets. As many communities in the primary and

and secondary market areas are near build-out or have property ownership patterns that have not been subdivided on a great scale in recent years, it is hardly an indicator of negative economic conditions.

**Table 4: Population, 2000-2013**

	2000	2008	2013	2000-2008 CAGR	2008-2013 CAGR
Primary Market	82,479	82,474	82,509	0.00%	0.01%
Secondary Market	204,548	205,732	207,018	0.07%	0.12%
Pennsylvania	12,281,054	12,631,267	12,836,126	0.35%	0.32%

CAGR= Compound Annual Growth Rate

Source: ESRI Business Analyst; Economics Research Associates, 2008

Consistent with the population data, the largest household increases are seen Commonwealth-wide, while the smallest increases are experienced in the primary market. This is illustrated in Table 5.

While the number of households in the primary and secondary market is rising at an increasing rate, the number of households in Pennsylvania is expected to increase at a decreasing rate, with the largest increases occurring between 2000 and 2008. In both markets and throughout Pennsylvania, average household size is forecasted to steadily decrease between 2000 and 2013. Smaller size, including single person households, could explain why the number of households is growing faster than the population.

**Table 5: Households, 2000-2013**

	2000	2008	2013	2000-2008 CAGR	2008-2013 CAGR
Primary Market	30,658	30,732	30,869	0.03%	0.09%
Secondary Market	81,504	82,842	83,769	0.20%	0.22%
Pennsylvania	4,777,003	4,973,714	5,079,458	0.51%	0.42%

CAGR= Compound Annual Growth Rate

Source: ESRI Business Analyst; Economics Research Associates, 2008

The median household income, as shown in Table 6, in the primary market is approximately double the median household income of Pennsylvania as a whole. The current median household income in the secondary market is roughly 80 percent of the median household income in the primary market. The median household income in the primary market is expected to increase by over 17 percent over the next five years.

As illustrated in Table 7, Commonwealth-wide, the largest income bracket (21 percent of all households) earns between \$50,000 and \$74,999. Only 3.5 percent of households in Pennsylvania earn over \$200,000, and almost half earn less than \$50,000.

However, in the primary market, the largest income bracket (25.2 percent) earns over \$200,000, with only 22.8 percent of residents earning under \$50,000. In the secondary market, the largest income bracket (21.2 percent) earns between \$100,000 and \$149,999, with almost 26 percent of residents earning under \$50,000.

**Table 7: Households by Income, 2008**

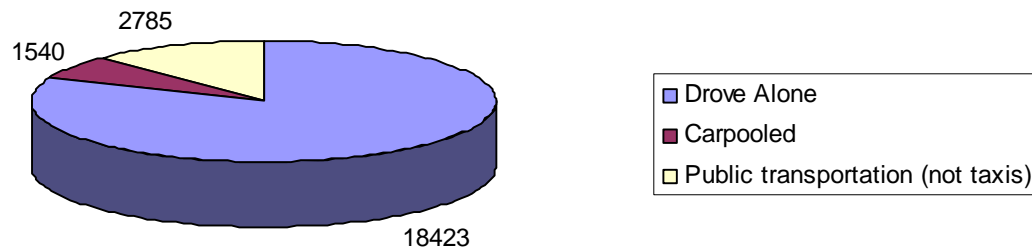
	Primary Market	Secondary Market	Pennsylvania
< \$15,000	5.9%	4.8%	11.8%
\$15,000-\$24,999	4.3%	5.1%	10.3%
\$25,000-\$34,999	4.5%	5.4%	10.3%
\$35,000-\$49,999	8.1%	10.5%	14.3%
\$50,000-\$74,999	14.4%	18.4%	21.2%
\$75,000-\$99,999	11.1%	15.2%	15.4%
\$100,000-\$149,999	17.9%	21.2%	10.0%
\$150,000-\$199,999	8.6%	7.7%	3.2%
> \$200,000	25.2%	11.7%	3.5%

Source: ESRI Business Analyst; Economics Research Associates, 2008

Figure 18 illustrates travel-to-work data for Lower Merion Township.

The American Community Survey of the US Census reports that in the period 2005-2007, 81 percent of Lower Merion Township residents drove alone to work; seven percent carpooled, and 12 percent used public transportation (not including taxi cabs).

**Figure 18: 2005-2007 Lower Merion Township Mode of Travel to Work**



Source: American Community Survey, 2009

The SEPTA Regional Rail Census (2009) reported that the Bryn Mawr station was ranked 20<sup>th</sup> highest in total weekday boarding and 23<sup>rd</sup> highest when ranked against all stations including the three main Center City Stations. From 2007 to 2009, total weekday boarding decreased by 24.5%. The average number of weekday inbound boarding at the station in 2009 was 711; average weekday outbound boarding was 120; total weekday boarding were 831. The Bryn Mawr station had one of the largest ridership decreases from 2007 to 2009.

The potential value of increasing ridership on public transportation, including rail transit, as a result of a TRID-enhanced, TOD Bryn Mawr Village center can help reduce the number of commuter trips during rush hours, provide a measure of relief from congestion and the environmental and fiscal costs associated with heavily traveled roadways. While the establishment of a successful TRID district alone cannot alleviate all congestion and auto-related air pollution in Bryn Mawr, it can make a difference as part of an overall strategy to manage and relieve traffic congestion, maintain infrastructure and support a high quality of life.



## **VIII. Real Estate Market Conditions**

### **Office and Retail Market**

Table 8 and Table 9 illustrate historic and current office and retail market conditions in the primary and secondary submarkets.

In the last six years, only 130,000 square feet of new office space was delivered in the primary market, with almost 850,000 square feet of new office delivered in the secondary market. Overall, absorption in the primary office market has been positive, averaging 11,300 square feet annually between 2002 and 2007. Absorption between these years varied, with a low of negative 43,000 square feet in 2004 to a high of 104,700 square feet in 2006. In the secondary office market, absorption was much stronger, with an average absorption of 121,000 square feet annually between 2002 and 2007. Absorption reached a low of approximately negative 1.8 million square feet in 2003. However, in subsequent years, absorption has been strong, with a high of 882,800 square feet in 2006.

Office vacancy rates are significantly higher in the secondary market. In the primary market, vacancy rates averaged 7.3 percent, while in the secondary market, rates averaged 15.6 percent. Both markets experienced a decline in 2008 vacancy rates. Office rental rates in both markets are comparable, with rates averaging \$27.18 per square foot in the primary market and \$26.43 per square foot in the secondary market.

**Table 8: Office Market Profile, 2002-2007**

Submarket	Summary Data - QTD				
	Number of Buildings	Total RBA /1	Share of Defined Market	Vacancy Rate /2	Average Rental Rate
Primary Market	144	2,347,918	8.5%	5.5%	\$29.16/fs
Secondary Market	792	25,157,645	91.5%	11.9%	\$27.24/fs
Regional Market Total	936	27,505,563	100.0%	8.7%	\$26.50/fs

	Rentable Building Area Delivered, 2002-2007 Annual Totals							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	40,000	0	0	90,000	0	0	21,667	0	0
Secondary Market	430,120	61,000	3,313	0	15,496	338,078	141,335	202,678	0
Regional Market Total	470,120	61,000	3,313	90,000	15,496	338,078	163,001	202,678	0

	Direct Net Absorption, 2002-2007 Annual Totals							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	(42,775)	20,406	(42,964)	46,774	104,732	(18,618)	11,259	2,934	(8,689)
Secondary Market	334,530	(1,824,248)	79,193	574,187	882,817	679,775	121,042	121,985	191,240
Regional Market Total	291,755	(1,803,842)	36,229	620,961	987,549	661,157	132,302	124,919	182,551

	End of Year Direct Vacancy Rate, 2002-2007							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	7.4%	6.5%	8.4%	9.9%	5.4%	6.2%	7.3%	6.4%	6.0%
Secondary Market	12.0%	19.7%	19.4%	17.0%	13.5%	12.0%	15.6%	13.7%	11.9%
Regional Market Average	9.7%	13.1%	13.9%	13.5%	9.5%	9.1%	11.5%	10.1%	8.9%

	End of Year Direct Rent, 2002-2007							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	\$25.57	\$26.45	\$27.37	\$28.48	\$26.59	\$28.62	\$27.18	\$27.99	\$28.57
Secondary Market	\$27.70	\$25.88	\$25.04	\$25.88	\$26.37	\$27.71	\$26.43	\$27.16	\$27.68
Regional Market Average	\$26.64	\$26.17	\$26.21	\$27.18	\$26.48	\$28.17	\$26.81	\$27.58	\$28.13

1/ Rentable Building Area  
 2/ Does not include Sublet Vacancy

Source: CoStar Property; Economics Research Associates, November 2008

**Table 9: Retail Market Profile, 2002-2007**

Submarket	Summary Data - QTD				
	Number of Buildings	Total RBA /1	Share of Defined Market	Vacancy Rate /2	Average Rental Rate
Primary Market	156	1,973,623	15.8%	3.4%	\$27.12/nnn
Secondary Market	429	10,518,392	84.2%	3.1%	\$25.57/nnn
Regional Market Total	585	12,492,015	100.0%	3.2%	\$22.27/nnn

	Rentable Building Area Delivered, 2002-2007 Annual Totals							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	0	0	0	24,000	0	3,680	4,613	3,680	0
Secondary Market	6,000	0	31,550	0	7,890	20,000	10,907	20,000	0
Regional Market Total	6,000	0	31,550	24,000	7,890	23,680	15,520	23,680	0

	Direct Net Absorption, 2002-2007 Annual Totals							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	(1,536)	(32,771)	(39,762)	23,213	(6,491)	22,619	(5,788)	29,663	6,059
Secondary Market	(44,390)	(75,137)	(100,062)	(130,899)	26,492	35,646	(48,058)	(73,821)	70,188
Regional Market Total	(45,926)	(107,908)	(139,824)	(107,686)	20,001	58,265	(53,846)	(44,158)	76,247

	End of Year Direct Vacancy Rate, 2002-2007							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	1.7%	3.4%	5.4%	5.4%	5.7%	4.8%	4.4%	4.2%	4.4%
Secondary Market	0.8%	1.6%	2.8%	4.1%	3.9%	3.7%	2.8%	4.6%	3.1%
Regional Market Average	1.2%	2.5%	4.1%	4.7%	4.8%	4.2%	3.6%	4.4%	3.8%

	End of Year Direct Rent, 2002-2007							Through 3Q	
	2002	2003	2004	2005	2006	2007	Avg Annual	2007	2008
Primary Market	\$27.00	\$26.87	\$26.93	\$28.13	\$29.79	\$29.82	\$28.09	\$29.33	\$31.77
Secondary Market	\$18.00	\$21.47	\$25.15	\$23.03	\$16.80	\$20.52	\$20.83	\$17.57	\$22.09
Regional Market Average	\$22.50	\$24.17	\$26.04	\$25.58	\$23.30	\$25.17	\$24.46	\$23.45	\$26.93

1/ Rentable Building Area

2/ Does not include Sublet Vacancy

Source: CoStar Property; Economics Research Associates, November 2008

From 2002- to the third quarter of 2008, 32,293 square feet of retail space was delivered in the primary market and 96,297 square feet of new retail space was delivered in the secondary market. Overall, absorption in the primary and the secondary retail market from 2002 to 2007 was negative, averaging negative 5,788 square feet and negative 48,058 square feet, respectively, per year.

Recently, the primary and secondary retail markets had begun to absorb more retail space before the economic crises in the fourth quarter of 2008. Retail growth in the primary and secondary markets will likely be slowed, not only by the recession but also by the excess space available in the market.

Average retail vacancy rates are higher in the primary market than the secondary market, averaging 4.4 percent and 2.8 percent, respectively. In both markets, retail vacancy rates have declined since 2006.

Average retail rental rates in the primary market are significantly higher than rental rates in the secondary market, averaging almost \$8 per square foot higher. Rental rates in the secondary market have fluctuated greatly, ranging from a low of \$16.80 per square foot in 2006 to a high of \$25.15 per square foot in 2004. Rental rates in the primary market have been more stable, fluctuating only by less than \$3 in the past six years.

## Residential

Table 10 illustrates data regarding two multi-family for-sale residential properties.

Cambridge Square is located in Ardmore, PA in Lower Merion Township. With 28 units, a sales rate of 0.93 indicates that since the pre-sales date of September 2006, approximately one unit has been sold each month. Sales have slowed in recent months to approximately one unit every four months. The project is approximately 82 percent sold.

Merion Manor is located in Merion Station, PA in Lower Merion Township. With 30 units, a sales rate of 0.96 indicates that since the pre-sales date of November 2006, approximately one unit has been sold each month. Sales have slowed in recent months to approximately one unit every four months. The project is approximately 73 percent sold.

**Table 10: Multi-Family For-Sale Residential Comparables, 2008**

	Cambridge Square	Merion Manor
Location	Ardmore, PA	Merion Station
Average Price	\$686,900	\$410,000
Average sq. ft.	1,662	1,626
Average price/sq. ft.	\$413.30	\$252.15
Open Date	9/6/2006	11/1/2006
Units Planned	28	30
Sold		
1/08-9/08	2	6
PTD	23	22
Sales Rate per Month		
1/08-9/08	0.22	0.26
PTD	0.93	0.96

Source: Hanley Wood; Economics Research Associates, November 2008

## IX. Infrastructure Improvements: Selected Key Projects

The 2006 Bryn Mawr Master Plan outlines several development principles. Selected key infrastructure-related projects include:

- Streetscape and traffic improvements around Lot 7. Projected cost is \$78,000.
- Projected cost of \$2.6 million for the following selected intersection and infrastructure improvements:
  - Targeted streets for improved sidewalks, lighting, streetscape, and street tree planting include Morris Avenue, Merion Avenue, Roberts Road, Central Avenue, and Summit Grove Avenue.
  - Summit Grove Avenue is proposed to be extended through to Old Lancaster Road to improve the network of pedestrian friendly streets in the area and promote linkages between the medical and residential districts and the Village Center.
  - Expand width of sidewalks on Bryn Mawr Avenue.
  - Improve pedestrian linkages between the Lancaster Avenue commercial district and the surrounding neighborhoods.
  - Develop a standard treatment for crosswalks and sidewalks and intersection ADA curb cuts to improve pedestrian crossings.
  - Strengthen the gateway points on all sides by using signage of the historic center of the Village in and around Lancaster Avenue and Bryn Mawr Avenue.
- Streetscape improvements on Bryn Mawr Avenue/Morris Avenue; Underpass enhancements and intersection improvements. Projected cost is \$1.6 million.
- A mixed-use project incorporating residential development in the block bounded by Central Avenue, Summit Grove Avenue, and Lancaster Avenue would be developed by the Bryn Mawr Hospital in partnership with the Township. This project could be a public/private partnership with Lower Merion Township utilizing a municipal parking lot centrally located in this area. A parking structure integral to the project could provide up to 980 spaces. Private investment could exceed \$25 million.

- Montgomery Avenue, Lancaster Avenue and County Line Road improvements to the pedestrian environment through streetscape and traffic calming in the village center and investment in cohesively designed sidewalks. Projected cost is \$259,000.
- Reconfiguration of Bryn Mawr Community Center park area and parking. Projected cost is \$114,000.
- New access way leading to the Village Center between Bryn Mawr Ave and Central Ave to improve vehicular and pedestrian circulation and provide access to new residences and parking. Projected cost is \$5.3 million.

## X. Transportation-Related Improvements: Selected Key Projects

The 2006 Bryn Mawr Master Plan outlines several development principles. Selected key transportation-related projects include:

- A new parking structure north of the tracks on the Amtrak site leased to SEPTA would accommodate displaced parking from Lot 7 and an increase of commuter parking for Bryn Mawr transit users. A four level garage could provide up to approximately 250 spaces and could accommodate increased ridership. Projected cost is approximately \$6.3 million.
- A parking structure in the block bounded by Central Avenue, Summit Grove Avenue, and Lancaster Avenue would be a joint development effort between the Hospital and the Township. This structure could accommodate up to 980 spaces as part of a mixed-use project that wraps around the parking. Projected cost is up to \$24.5 million.
- Streetscape and circulation improvements to Bryn Mawr Avenue on the south side of the station will create a more formalized drop-off area opening onto a broad plaza. Projected cost is \$237,000.
- An improved access way from Montgomery Avenue to Morris Avenue near the station would clarify pedestrian and drop-off circulation. Projected cost is \$175,000.
- Relocate parking in area. Projected cost is \$58,000.

Amtrak is planning to relocate the interlocking at the Bryn Mawr Station to improve train efficiency and on-time performance. SEPTA will identify funding sources to address *future* Americans with Disabilities Act (ADA) access improvements at the station, including high-level platforms and ramps.



## XI. Financial Plan

The financial plan for the Bryn Mawr TRID is based on estimates of potential incremental property value increases and resulting tax revenues. The projected, estimated, incremental increased value is “captured” for use for TRID revitalization projects. Those potential value increases assume that specific redevelopment activities will occur similar to the development program presented in the Bryn Mawr Master Plan and adjusted as some changes in property parcels and new projects have come online. To be conservative and because most of the parcels with high redevelopment potential are privately held, only the Bryn Mawr Hospital improvements plus the proposed improvements featured in the Master Plan – Lot 7, the Verizon lot, and the Central Avenue redevelopment concept – were used to calculate value capture estimates. The assessed values of the balance of the parcels are shown as increasing at a rate similar to those in the recent past, but without alteration. Realistically there will probably be some changes made in the other properties as well but the timing and value of those improvements cannot be estimated in advance.

Each property within the proposed TRID boundary was identified by parcel number, current assessed value and tax status (whether or not it was taxed or exempt from real estate taxes). The real estate tax revenues currently generated by eligible properties are considered the *baseline* revenues. Baseline revenues are assumed to continue to flow to the various jurisdictions (Lower Merion Township, Montgomery County, and the Lower Merion School District). These funds would not be available for TRID plan projects. The projected estimated increase in value over-and-above the baseline becomes eligible for inclusion in the TRID financial plan.

Table 11 provides a summary of the Bryn Mawr TRID value capture analysis. The current total assessed value for the four featured development parcels (Bryn Mawr Hospital Properties, Lot 7, Central Avenue Development Properties, and Verizon Lot) is almost \$18 million. The total estimated assessed value after improvements for these same parcels is over \$108 million – a difference of over \$90 million.

**Table 11: TRID Value Capture Summary**

<b>Current Assessed Values</b>		
Total TRID Area (including Planned Developments)		\$ 120,038,890
Total Preliminary TRID Area (excluding Parcels Planned for Developments)		\$ 102,047,000
Bryn Mawr Hospital Development Program Properties		\$ 7,941,545
Lot 7 (Exempt)		\$ -
Central Ave. Development Program Properties		\$ 8,843,002
"Verizon" Lot		\$ 1,207,343
<b>Current Total Assessed Value</b>		<b>\$ 17,991,890</b>
<b>Estimated Assessed Values After Improvements</b>		
Bryn Mawr Hospital Development Program Properties		\$ 46,284,905
Lot 7		\$ 21,228,949
Central Ave. Development Program Properties		\$ 38,865,110
"Verizon" Lot		\$ 1,686,960
<b>TOTAL Estimated assessed value after Improvement</b>		<b>\$ 108,065,923</b>

Source: Economics Research Associates, 2008-2009

### **Build-out Analysis and Valuation Timeline**

Based on information available, a build-out timeline was established for each of the redevelopment sites. This timeline establishes when various projects will be partially or completely generating real estate taxes.

Property valuation was established by comparing existing, comparable development elsewhere in Lower Merion Township (when possible) or nearby to estimate the possible assessed value upon occupancy.

As illustrated in Table 12 and Table 13, the build-out timeline assumes the following schedule:

- 100 percent of the build-out of Lot 7 in 2014;
- 100 percent of build-out of the Bryn Mawr Hospital surface lot in 2012;
- 100 percent of the build-out of the Old Lancaster Medical Office Building in 2010;
- 100 percent of the build-out of the Founders Medical Office Building in 2012;
- 100 percent of the build-out of the Bryn Mawr Hospital Pennsylvania Avenue townhomes (22 market-rate homes) in 2011;

- 100 percent of the build-out of the Central Avenue Redevelopment Area in 2016;
- 100 percent of the build-out of the Verizon Lot in 2011.

Table 12: Buildout Analysis

Lot 7	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
<b>Retail</b>																				
Ground Floor Retail	0%	0%	0%	0%	20%	80%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Parking</b>																				
Structure	0%	0%	0%	0%	20%	80%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Residential</b>																				
Luxury Multi-family	0%	0%	0%	0%	20%	80%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>BMH</b>																				
<b>Parking</b>																				
Structure-Phase II	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Surface Lot	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Office</b>																				
Medical Office Building-Old Lancaster	0%	0%	20%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Medical Office Building-Founders	0%	0%	0%	0%	20%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Residential</b>																				
Townhomes	0%	0%	80%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Central Avenue Redevelopment Area</b>																				
<b>Residential</b>																				
Townhomes	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Apartments above retail/office	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Office</b>																				
Office above retail	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Retail</b>																				
Ground floor retail	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Other</b>																				
Theater expansion	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Parking Structures	0%	0%	0%	0%	0%	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
<b>Verizon Lot</b>																				
Retail (ground floor)	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Office (upper story)	0%	0%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Balance of TRID	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Source: Economics Research Associates, 2008

**Table 13: Valuation Timeline**

Lot 7	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
<b>Retail</b>																				
Ground Floor Retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 850,176	\$ 3,400,704	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880	\$ 4,250,880
<b>Parking</b>																				
Structure	\$ -	\$ -	\$ -	\$ -	\$ 445,005	\$ 1,780,019	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023	\$ 2,225,023
<b>Residential</b>																				
Luxury Multi-family	\$ -	\$ -	\$ -	\$ -	\$ 2,950,609	\$ 11,802,437	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046	\$ 14,753,046
<b>BMH</b>																				
<b>Parking</b>																				
Structure-Phase II	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Surface Lot	\$ -	\$ -	\$ -	\$ -	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826	\$ 252,826
<b>Office</b>																				
Medical Office Building-Old Lancaster	\$ -	\$ -	\$ 3,390,701	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507	\$ 16,953,507
Medical Office Building-Founders	\$ -	\$ -	\$ -	\$ -	\$ 2,537,260	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298	\$ 12,686,298
<b>Residential</b>																				
Townhomes	\$ -	\$ -	\$ 13,113,818	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273	\$ 16,392,273
<b>Central Avenue Redevelopment Area</b>																				
<b>Residential</b>																				
Townhomes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800	\$ 16,882,800
Apartments above retail/office	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120	\$ 8,319,120
<b>Office</b>																				
Office above retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500	\$ 5,755,500
<b>Retail</b>																				
Ground floor retail	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700	\$ 6,752,700
<b>Other</b>																				
Theater expansion	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590	\$ 268,590
Parking Structures	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096	\$ 7,639,096
<b>Verizon Lot</b>																				
Retail (ground floor)	\$ -	\$ -	\$ -	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300	\$ 996,300
Office (upper floor)	\$ -	\$ -	\$ -	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660	\$ 690,660
Balance of TRID Boundary Area	\$ -	\$ 102,047,000	\$ 105,108,410	\$ 108,261,662	\$ 111,509,512	\$ 114,854,798	\$ 118,300,442	\$ 121,849,455	\$ 125,504,938	\$ 129,270,087	\$ 133,148,189	\$ 137,142,635	\$ 141,256,914	\$ 145,494,621	\$ 149,859,460	\$ 154,355,244	\$ 158,985,901	\$ 163,755,478	\$ 168,668,142	\$ 173,728,187
Annual increase 2.77% 6-yr CPI average																				
Source: Economics Research Associates, 2008-2009																				

## **XII. Tax Revenue Projections**

As previously stated, the establishment of a TRID district does not raise taxes or tax rates. The value capture mechanism in TRID simply dedicates tax revenues generated above the baseline for TRID projects for a specified period. While the estimates assume that tax rates will adjust annually at 3.66%, those assumptions are based on previous years’ typical increases. Those increases are held constant in the model, an assumption but not guaranteed.

Properties in the TRID are taxed by three jurisdictions: Montgomery County, Lower Merion Township, and the Lower Merion Township School District. The millage rates used in the model are based on the following millage rates:

Lower Merion Township	3.68
Montgomery County	2.695
Lower Merion Township School District	21.4015
Total Millage	27.776

In assuming property tax revenue projections, two different scenarios were tested. Scenario I, shown in Table 14, assumes a combined tax rate of 80 percent of the Lower Merion Township tax revenues + 80 percent of Montgomery County tax revenues would be available for the TRID. Under Scenario I, total revenue available for TRID-related projects over the next 20 years is estimated to be approximately \$18.2 million.

Table 15 illustrates Scenario II, which assumes a combined tax rate of 80 percent of Lower Merion Township tax + 80 percent of Montgomery County tax + 25 percent of Lower Merion School District tax revenues available for the TRID. In Scenario II, total revenue available for TRID-related projects over the next 20 years is estimated to be approximately \$42.2 million.







### **Future Maintenance Requirements**

It is Lower Merion Township's intention to provide required maintenance to public property (i.e., streets, etc.) through the Township's annual Capital Improvement Plan. Private development would be maintained by private property owners. Maintenance of the station garage facilities and ADA accommodations are to be negotiated in final agreement with SEPTA and Amtrak.

## **XIII. Implementation**

### **TRID Management**

The Lower Merion Township will serve as the TRID Management Entity. TRID management and expenditures will be administered through an Executive Committee consisting of the Lower Merion Township Manager, the Lower Merion Township Finance Director, SEPTA Representative, and the Ward 10 Commissioner. The Management Entity will be supported by Township staff with oversight by the Township Board of Commissioners.

### **TRID Implementation**

TRID implementation includes negotiated TRID cooperative agreements with:

- Amtrak (Lot 7 development, station facilities and parking)
- SEPTA (parking structure and transit improvements including ADA accessibility upgrades, maintenance for facilities). Note that maintenance activities are a permitted use of TRID funds by partnering transit agencies.
- Montgomery County (value capture share)
- Lower Merion School District

### **Required Agreements**

The following agreements are required for TRID implementation:

- TRID Management Entity issues RFP seeking Developer interest for Lot 7
- TRID Management Entity and Bryn Mawr Hospital issue RFP seeking Developer interest for Central Avenue
- Development proposals accepted by TRID Management Entity and Township
- TRID Management Entity executes Development Agreement with successful Developer for Lot 7, including Public Sector Improvements and Private Sector Financial or Project Commitments
- Project construction and completion
- TRID Management Entity administers Value Capture revenues and expenditures in accordance with approved Implementation Program
- Amendments to Agreement or TRID Plan, as required

Draft Agreement is provided in Appendix F.

## **XIV. Appendix A-TRID Legislation**

**AN ACT**

HB 994

Empowering municipalities, counties and public transportation agencies to work cooperatively to establish Transit Revitalization Investment Districts (TRID), including partnerships with the National Railroad Passenger Corporation requiring planning studies, comprehensive plan and zoning amendments and use of existing statutes and techniques to achieve transit-oriented development, redevelopment, community revitalization and enhanced community character through TRID creation; establishing value capture areas as a means to reserve and use future, designated incremental tax revenues for public transportation capital improvements, related site development improvements and maintenance; promoting the involvement of and partnerships with the private sector in TRID development and implementation; encouraging public involvement during TRID planning and implementation; and providing for duties of the Department of Community and Economic Development.

The General Assembly of the Commonwealth of Pennsylvania hereby enacts as follows:

**CHAPTER 1**

**GENERAL PROVISIONS**

Section 101. Short title.

This act shall be known and may be cited as the Transit Revitalization Investment District Act.

Section 102. Declaration of policy.

The General Assembly finds and declares as follows:

- 1) The overall purpose and legislative intent of this act is to authorize public transportation agencies throughout this Commonwealth to work cooperatively with counties, local governments, transportation authorities, the private sector and the National Railroad Passenger Corporation (AMTRAK) and other providers of public transportation and passenger rail services to create and designate Transit Revitalization Investment Districts (TRIDs).
- 2) The specific purposes and intent of a designated TRID are to:
  - i. Promote local, county and regional economic development and revitalization activities through private sector investment, reinvestment and joint development activities in conjunction with public transportation improvements.
  - ii. Encourage multimunicipal, cooperative approaches to generate new investment, reinvestment and revitalization through transit-oriented development around rail transit stations and along public transportation corridors.

- iii. Increase overall ridership on public transportation systems, including AMTRAK, while generating additional revenues for current and expanded services, capital improvements and related ongoing maintenance.
- iv. Encourage and support municipal and multimunicipal comprehensive plan implementation, including consistency of plans at the local, county and regional levels.
- v. Stimulate public-private partnerships created by prospective development opportunities around, within or adjacent to the transit system, station areas and transit system components.
- vi. Establish appropriate mechanisms to capture the real estate taxation and other values added by joint development activities for reinvestment in the transit system and local communities.
- vii. Encourage greater community involvement in TRID location, design and implementation and resulting investment activities.
- viii. Promote flexible, cooperative, coordinated and enhanced support for innovative, intermodal solutions in TRID development and implementation activities by municipal officials, public agencies, nonprofit organizations and the private sector.
- ix. Support TRID implementation by maximizing use of existing Federal and State laws and programs that are consistent with the purposes of this act.

#### Section 103. Definitions.

The following words and phrases when used in this act shall have the meanings given to them in this section unless the context clearly indicates otherwise:

“AMTRAK.” The National Passenger Railroad Corporation.

“Department.” The Department of Community and Economic Development of the Commonwealth.

“Public transportation agency.” A public transportation authority or similar entity, created through the laws of this Commonwealth, charged with the provision of mass transit services to the traveling public, that owns and maintains or is authorized to own and maintain a physical plant, including rolling stock, stations, maintenance and support facilities.

“Public transportation provider.” A public or private entity that operates or is authorized to operate intercity or local commuter passenger rail services within this Commonwealth that are open to the general public and that owns and maintains or is authorized to own or maintain a physical plan, including rolling stock, stations, maintenance and support facilities.

“Transit-oriented development.” Development concentrated around and oriented to transit stations in a manner that promotes transit riding or passenger use. The term does not refer to a single real estate project but represents a collection of projects, usually mixed use, at a neighborhood scale that are oriented to a transit node.

“TRID.” A Transit Revitalization Investment District created in accordance with this act.

“TRID planning study.” A study required to be undertaken by one or more municipalities, with the active involvement of a public transportation agency and the pertinent county or counties, for the purpose of establishing the boundaries, existing environmental conditions, existing and proposed land use, property availability, real estate market conditions, development potential, including use of air space rights, required zoning amendments, desired infrastructure and necessary transportation-related improvements and a financial plan, including funding sources, a proposed amortization schedule where applicable and estimated future maintenance requirements, to support the designation and implementation of a proposed TRID.

“Value capture area.” An area coincident with the boundaries of a TRID, established simultaneously with TRID designation, in accordance with this act, in which real estate tax revenues and any other designated tax revenues shall, at a minimum, be shared by the participating local jurisdiction or jurisdiction and public transportation agency or agencies for the purpose of implementing a TRID.

### **CHAPTER 3**

#### **TRID CREATION AND LOCATION**

##### Section 301. Criteria for proposed TRID.

Local municipalities, counties transportation authorities and public transportation agencies proposing to define and develop a TRID shall use the following criteria and process:

- 1) Eligible TRID locations may include any geographic area of a municipality or municipalities, including vacant, underutilized or potentially redevelopable land, within an area generally formed by a minimum radius of one-eighth mile and not to exceed a radius of one-half mile from a railroad, transit, light rail, busway or similar transit stop or station or stop location. TRID designation may also include new station locations proposed in conjunction with a planned public transportation service, as defined on an adopted county, regional or public transportation agency plan.
- 2) The specific boundaries of a TRID may be expanded or reduced based on local circumstances such as local economic development and planning goals, community character, property boundary and scale variations but only when:
  - i. authorized by the governing body or bodies of the affected jurisdiction or jurisdictions in cooperation with the pertinent public transportation agency; and
  - ii. the rationale for the boundaries is supported by the findings of the required TRID planning study.
- 3) A local municipality or municipalities shall further define and support the rationale for the TRID designations through a TRID planning study as well as appropriate amendments to the municipal comprehensive plan, zoning ordinance and other pertinent regulations.
- 4) A local municipality may designate the county planning agency to undertake or assist the TRID planning study on its behalf.

- 5) An existing neighborhood improvement district, tax increment district or urban renewal area may be used as a basis for the boundaries of a TRID when justified by the TRID planning study required in section 304.

Section 302. TRID designation.

- a) Designation. – Local municipalities and counties working with public transportation agencies, transportation authorities, AMTRAK, passenger rail transportation providers or any combination thereof may designate TRIDs in advance of implementation of a new public transit service or in conjunction with an existing public transportation service and in advance of or in conjunction with actual development proposals.
- b) Agreement. – To create a TRID, in addition to the planning study described in section 301(3), the municipality or municipalities shall enter into an agreement with the transit agency that defines the activities and commitments of each party to the TRID, including any specific actions or financial participation to help implement the TRID. The agreement shall include the development agreement specified in section 504 as well as a description of the TRID management entity described in section 502(4).

Section 304. TRID planning study factors.

The scope and scale of transit improvements and community facility improvements, as well as any needed support facilities, shall be assessed in the TRID planning study. The TRID planning study shall also serve as the basis for a comprehensive plan amendment to establish the TRID if the municipality has a currently adopted comprehensive plan. The following shall apply:

- 1) The planning study shall consider the need for capital improvements to transit-related facilities and adjacent public infrastructure, including roads, sidewalks and water, sewer and storm drainage service and public facilities, as well as opportunities for private sector real estate development and ways in which such facilities, services and development can be financed.
- 2) Municipalities undertaking a TRID planning study shall receive priority consideration for planning and implementation grants and technical assistance from the department, working in partnership with the pertinent county planning agency or agencies and other State agencies with grant or loan programs that may be applicable to TRID planning or implementations. Any funding appropriated to the Department of Community and Economic Development for the purpose of carrying out this act is intended to assist counties and local governments on a 25% matching basis to undertake TRID planning studies and related implementation activities. Individual grants for a TRID planning study or implementation project shall not exceed \$75,000. The department in consultation with the Department of Transportation shall administer the supplemental TRID program through the existing land use planning and technical assistance program, with application guidance as necessary.
- 3) Commonwealth agencies are directed to provide State resources, programs and new capital investments that will assist local governments, transportation authorities and transit agencies to implement TRIDs.

Section 305. Roles and responsibilities of public transportation agencies and municipalities.

As guidelines to implement the findings and recommendations of the TRID planning study, the following roles and responsibilities are defined:

- 1) The scope and scale of the needed or proposed transit capital improvements within the TRID area are the responsibility of the partnering public transportation agency. The cost, financing, phasing and schedule of all transit-related improvements shall be included in the public transportation agency's adopted capital program.
- 2) The scope and scale of need or proposed support facilities, highway accessways and community or neighborhood facility improvements, for example, sidewalks and recreation facilities, are the responsibility of the partnering county and local jurisdiction or jurisdictions and may include support from the private sector.
- 3) Notwithstanding these stated roles and responsibilities, the parties to a TRID shall be responsible for defining the administrative and management roles and responsibilities that will be most appropriate to achieve implantation of the TRID in their community.

Section 306. Amendments to TRID planning study.

Proposed real estate development or redevelopment may trigger additional needs for transit improvements and community facility improvements or support facilities and shall be accommodated through pertinent amendments of the TRID planning study and county, multimunicipal or local municipal comprehensive plan.

Section 307. Municipal cooperation.

Nothing in this act shall preclude two or more municipalities or a municipality and a transportation authority from working together cooperatively with a public transportation authority to define and establish one or more TRIDs along a public transportation corridor, using the criteria established under this act.

## CHAPTER 5

### LAND DEVELOPMENT POWERS OF PUBLIC TRANSPORTATION AGENCIES

Section 501. Authority to acquire and improve property.

Consistent with the existing authority or limitations of public transportation agencies to condemn and acquire land for public transportation purposes, such entities are hereby authorized to acquire and improve property located within a designated TRID for real estate development purposes provided such acquisition and improvement:

- 1) Is consistent with any pertinent municipal comprehensive plan and TRID planning study.
- 2) Is coordinated with pertinent county and local jurisdictions and redevelopment or other special purpose authorities.



- 3) Furthers the stated purposes of this act.
- 4) Does not exceed the minimum land area necessary to accomplish the needs specified in the TRID planning study and the development agreement.

Section 502. Development or redevelopment of property.

Development or redevelopment of property within a TRID shall generally occur in the following manner:

- 1) The public transportation agency may acquire the property, improve it for future development, such as site clearance, utility work, environmental remediation and similar improvements, and work cooperatively with the pertinent local jurisdiction or jurisdictions and implementing agencies to offer it for sale to the private sector for use or uses consistent with the adopted TRID plan.
- 2) Alternatively, the public transportation agency may advertise the presence of available development sites within the TRID, including a map of potentially developable or redevelopable properties, and invite interested developers to submit proposals in cooperation with the pertinent local jurisdiction or jurisdictions and implementing agencies.
- 3) In the case of either paragraph (1) or (2), the public transportation agency may not be the primary real estate developer, and joint development activities are confined to the construction of support and access facilities: that is, vehicular access, parking, pedestrian ways, building pads, foundation columns, signage, and similar items.
- 4) The partnering TRID local municipality or municipalities shall designate a management entity for the TRID which may be a municipal authority or joint authority, in accordance with the requirements of 53 Pa. C.S. Ch. 56 (relating to municipal authorities) to manage and facilitate TRID implementation. The local municipality or municipalities involved in the TRID shall retain policy and oversight responsibilities for all budgetary and programmatic actions of the designated TRID management entity.
- 5) Creative partnerships with AMTRAK, passenger rail transportation providers, transportation authorities and the private sector to accomplish TRID purposes that use the benefits of AMTRAK's and passenger rail service providers' existing real estate development powers are both desirable and encouraged.
- 6) Neighborhood improvement districts, business improvement districts or similar entities may be designated to manage the TRID implementation activities.

Section 503. Coordination of development activities.

The public transportation agency shall coordinate development activities with the pertinent county or local redevelopment authority, planning commission and governing body. If such entities are able to accommodate the land acquisition or marketing needs of the TRUD in a more timely fashion, an agreement may be established between the public transportation agency and such entities to implement this aspect of the overall TRID program.

Section 504. Development agreements.

In furtherance of the agreement specified in section 302, the partnering municipality, transportation authority, public transportation agency and, if participating, county representatives, including the designated management entity, shall enter into a development agreement with the pertinent private sector development organization or organizations to implement the proposed TRID. The development agreement shall stipulate the final project scope as well as the partners' roles, responsibilities, financing arrangements, schedule of improvements and exactions or contributions to the project.

## **CHAPTER 7**

### **VALUE CAPTURE APPROACHES**

Section 701. Creation of value capture area.

In conjunction with the formal establishment of the TRID boundaries, a coterminous value capture area shall simultaneously be created to enable local municipalities, school districts, the county and the public transportation agency to share the increased tax increment of real estate and other designated tax revenues generated by new real estate investment within the TRID. The participants in the TRID, through the designated management entity, shall develop an administrative and project schedule and budget to implement the project, including future maintenance needs, as defined in the TRID planning study, as well as the shares and use of such tax revenues as are projected to be generated from the TRID value capture area. The participating municipality or municipalities may review and revise the TRID budget.

Section 702. Dedication of tax revenues.

Tax revenues generated within a TRID shall be dedicated to completion and future maintenance of the specific and necessary improvements designated in the comprehensive plan amendment and TRID planning study as follows:

- 1) Local municipalities and counties shall not use such revenues for general government purposes, and a public transportation agency shall not use such revenues for transit capital investments elsewhere on the public transportation system.
- 2) Local municipalities, school districts and the county shall establish an amortization schedule for receipts, investment and expenditure of any TRID tax revenues, not to exceed 20 years, similar to the amortization schedule in the act of July 11, 1990 (P.L.465, No.113), known as the Tax Increment Financing Act. However, where a municipal or joint municipal authority has been created, it shall be responsible for fixing the amortization schedule and for defining the TRID capital improvement plan.

Section 703. Applicability of other statutes.

Local municipalities, counties, transportation authorities, the public transportation agency and local property owners are encouraged and may make maximum use of existing laws and regulations to advance and further implement TRID purposes. Without limitation, application of the following acts and

similar acts as well as pertinent Federal programs and statutes are consistent with the intent of TRID implementation:

- 1) Act of May 24, 1945 (P.L.982, No.383), known as the Redevelopment Law.
- 2) Act of May 24, 1945 (P.L.991, No.385), known as the Urban Redevelopment Law.
- 3) Act of December 1, 1977 (P.L.237, No.76), known as the Local Economic Revitalization Tax Assistance Act.
- 4) Act of July 9, 1985 (P.L.187, No.47), known as the Transportation Partnership Act.
- 5) Act of July 11, 1990 (P.L.465, No.113), known as the Tax Increment Financing Act.
- 6) Act of July 11, 1996 (P.L.677, No.116), known as the Infrastructure Development Act.
- 7) Act of October 6, 1998 (P.L.705, No.92), known as the Keystone Opportunity Zone, Keystone Opportunity Expansion Zone and Keystone Opportunity Improvement Zone Act.
- 8) Act of December 20, 2000 (P.L.949, No.130), known as the Neighborhood Improvement District Act.

Section 704. Private sector involvement.

Nothing described in this act shall preclude a private sector entity from offering to implement or finance needed public transportation or community improvements at the initiation of or concurrent with proposed TRID-related real estate development.

## **CHAPTER 9**

### **COMMUNITY INVOLVEMENT**

Section 901. Public meeting to explain TRID and alternative implementation approaches.

Community and public involvement in the establishment of TRIDs is required. The municipality and the public transportation agency shall jointly conduct at least one public meeting in the proposed TRID area prior to the enactment of a TRID, TRID planning study, comprehensive plan or zoning amendment. The meeting is intended to explain the purpose and components of the TRID and the alternative implementation approaches. The public meetings or meetings shall be in addition to any required local government public hearing or hearings prior to comprehensive or multimunicipal plan amendment adoption. However, nothing in this act shall relieve the TRID management entity from conducting all public meetings required by law where the TRID is acting or seeking to act under the:

- 1) Act of May 24, 1945 (P.L.991, No.385), known as the Urban Redevelopment Law.
- 2) Act of July 11, 1990 (P.L.465, No.113), known as the Tax Increment Financing Act.
- 3) Act of December 20, 2000 (P.L.949, No.130), known as the Neighborhood Improvement District Act.

Section 902. Public meeting to review proposed joint development plan and related improvements.

The municipality and the public transportation agency shall jointly conduct at least one public meeting in the TRID area to review the proposed joint development plan and its related improvements prior to implementation.

Section 903. Cooperation with neighborhood or community representatives.

The municipality and the public transportation agency shall encourage private sector real estate entities and land developers to work proactively and cooperatively with pertinent neighborhood or community representatives during the planning and implementation of TRID development proposals.

## **CHAPTER 21**

### **MISCELLANEOUS PROVISIONS**

Section 2101. Repeal.

All acts and parts of acts are repealed insofar as they are inconsistent with this act.

Section 2102. Effective date.

This act shall take effect in 60 days.

APPROVED – The 8<sup>th</sup> day of December, A.D. 2004.

EDWARD G. RENDELL

## **XV. Appendix B- Public Presentations and Meeting Notes**

# Bryn Mawr TRID Plan

*Ad Hoc* Committee Meeting

Project Initiation



18 January 2007

ERA

Economics Research Associates



# Transit Revitalization Investment District (TRID)

- TRID offers municipalities, transit agencies, and development community a mechanism to plan and implement transit-oriented development (TOD)
  
- TRID provides:
  - Flexible development around transit using existing supportive laws and programs
  
  - Partnership mechanism for municipalities and transit agencies
  
  - Funding for TOD planning and (potentially) implementation
  
  - Funding mechanisms for improvements, maintenance and infrastructure
    - Improvement district assessments (similar to NID/BID)
    - Value capture for improvements, maintenance, and reserve for replacement
  
  - Public involvement



# TRID Process

## ➤ Planning Phase

- Cooperative agreement between municipality and transit agencies
- TRID Planning Study to determine location, boundaries, and rationale
- Community public meetings
- Municipality and transit Agency accept Planning Study findings and recommendations

## ➤ Program Management Phase

- Formation of Management Entity (e.g. an Authority) to administer implementation
- Public sector infrastructure improvement plan (costs, phasing & maintenance)
- Coordination with School District and County on Value capture shares, schedule, and TRID Financial Plan
- Public meeting on TRID Implementation Program improvements
- Municipality and transit agreement on roles, responsibilities, financial commitments, management entity, and defined improvements

## ➤ Implementation Phase

- Solicitation of developer interest
- Development proposal process
- Development agreement, including public improvements & private commitments
- Value capture revenues and expenditures in accordance with approved program
- Amendments to agreement or TRID Plan, as required





# ERA / Sasaki / Civic Visions Team Scope of Work

- TRID Plan (based on Master Plan)
  - Boundaries
  - Zoning
  - Environmental
    - Roads, sidewalks, parking areas, community facilities, & historic resources
    - Water, sewer, and storm drainage
    - Pervious & impervious area within the boundary and drainage divides effecting storm water
  - TRID Plan rationale
  - Infrastructure & Transportation-related improvements (identify)
    - Traffic study implications (coordinating w/ Gannett Fleming study)
    - Identification of needed improvements to transit infrastructure (parking, station, accessibility & amenities)
    - Parking
    - Water, sewer & storm drainage
  - Real Estate Market Conditions documentation
    - Real propoerty availability, ownership and eligibility for value capture
    - Review market and financial inputs used in Lot 7 *pro forma* analysis
    - Investigate air rights potential

# ERA / Sasaki / Civic Visions Team Scope of Work (cont'd)



## ➤ TRID Plan

### ▪ Financial Plan

- Potential sources & uses of funds for identified projects
- Estimate value capture from identified projects
- Recommend timing and shares for value capture in TRID (working papers)
- Recommend phasing and/or prioritization of value capture funds and projects
- Identify & estimate future maintenance requirements (based on cost & replacement schedule)

### ▪ Community Involvement

- Small group workshops (2)
- Public meetings (2)
- *Ad Hoc* Committee consultation

## ➤ Deliverables

### ▪ TRID Plan

- Rationale
- Boundary map
- Existing conditions report
- Environmental conditions report
- Real Estate Conditions memorandum
- Projects plan memorandum
- Financial Plan
- Community Involvement Process



## Schedule

- Research and work tasks January – mid-April
- Small workshops in mid-April
- Public Meeting May 9<sup>th</sup>
- *Ad Hoc* Committee Meeting April 26<sup>th</sup> or first week of May
- Final presentation to Board of Commissioners September 11, 2007



# Issues to Discuss with *Ad Hoc* Committee

- Boundaries
- Rationale
- Schedule

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, January 18, 2007 at 5:30 PM**

**Meeting Notes**

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Charles Bloom  
Mike Fanning  
Andrea Gilbert  
Pat Wesley  
Hank Wilson

**Guests:**

Mac Nichols, Economics Research Associates  
Susan Snyder, CivicVisions  
Dave Fogel, Septa

**Staff in Attendance:**

Angela Murray  
Eric Persson  
Pat Ryan

**Meeting Notes**

**1. Report from the Chairman**

Chairman Zelov wished everyone a happy new year and welcomed everyone back noting that we did not meet in December. He next made note of the passing just after Christmas of committee member John Sabatini AIA and asked that we have a moment of silence in remembrance of John and his continuing service to the community. He was a participant in the Bryn Mawr and Ardmore Master Plan public processes, Bryn Mawr traffic committee chair and tireless proponent, fundraiser and designer of the Bryn Mawr gazebo. Commissioner Phillips suggested that a fitting memorial might be to name the gazebo for John. Mike Fanning, chair of Bryn Mawr Beautiful noted that the committee is considering the naming rights for the gazebo and that suggestion would be taken into consideration.

**2. Update from Main Line Health on hospital development approvals process and implementation schedule**

Scott Zelov announced that the Preliminary Plan for Bryn Mawr Hospital's development would

be reviewed at special meetings of the Planning Commission on Monday January 22<sup>nd</sup> and the Building & Planning Committee and Board of Commissioners on Wednesday January 24<sup>th</sup>. The hospital submitted its plans in early November, but due to the large amount of information submitted, it has taken two months for the staff and Township engineers to review. Scott, staff and the hospital representatives have met continuously this week to prepare agreed upon conditions of approval for the project. Andrea Gilbert, president of Bryn Mawr Hospital, agreed that there had been tremendous progress made this last week in resolving all the issues that will allow the hospital to begin its construction. They plan to move forward expeditiously once Final Plan approvals have been received.

### **3. Bryn Mawr Traffic Study**

Commissioner Zelov announced that Doug Cleland, Angela Murray and he met in early December with Bruce Looloian, the newly appointed director of real estate for the Philadelphia region of Amtrak. The meeting was held to brief him on the Bryn Mawr Master Plan and specifically, the plan for redevelopment of Lot 7. The Amtrak staff had a general understanding of the issues surrounding prior studies for redevelopment of the municipal parking lot and expressed their continued interest in participating in the project.

The Township has secured a proposal from Gannett Fleming Engineers to conduct a traffic study and analysis of the traffic proposals in the Bryn Mawr Master Plan. The proposal was tabled from the previous Building & Planning Committee agenda in order for revisions to be made based on the hospital's required traffic study. The Synchro model and trip generation data from that study will be utilized by Gannett Fleming as a base starting point for the larger study.

### **4. Kick-off of Bryn Mawr Master Plan TRID and Zoning Study and Schedule with consultants**

Commissioner Zelov announced that the Township had secured a \$75,000 Land Use Planning and Technical Assistance (LUPTAP) grant from the PA Department of Community and Economic Development (DCED) to support the further study of the Bryn Mawr district surrounding the train station. This is in addition to the \$100,000 grant from the Delaware Valley Regional Planning Commission for this study. The Township will contribute matching funds via the Capital Improvement Program.

Using a power point hand-out, Mac Nichols from Economics Research Associates and Susan Snyder from CivicVisions led the committee members through a review of the Transit Revitalization Investment District (TRID) project that will form the basis for Phase 2 of the Bryn Mawr Master Plan. TRID is a concept unique to Pennsylvania that adopts components of Tax Increment Financing Districts (TIF) and Business Improvement Districts (BID), but focuses on Transit Oriented Development or TOD. The mechanism is based on planning for needed public improvements that will support transit and promote economic revitalization in the business/transit area. Another component of the study will be to analyze existing zoning and recommend changes similar to the Township's recent Mixed-use Special Transit Overlay (MUST) district in Ardmore.

The legislation requires the cooperation of Septa and Amtrak along with the other taxing bodies such as Montgomery County and the Lower Merion School District. It further establishes a structure for funding by using a "Value Capture" and/or assessment to pay for pedestrian oriented and transit oriented public infrastructure improvements ranging from Federal Transit Administration (FTA) required Americans with Disabilities Act (ADA) upgrades to sidewalks and access-ways, as well as sewers and roadways. Funds can also be used to fund maintenance activities for the station and infrastructure as well as create a replacement reserve. The value

capture would apply only to taxable properties with institutions such as Ludington Library, Bryn Mawr College and certain of the hospital's buildings being exempt.

In early January, the consultant team and staff met to begin their work on the TRID plan starting with analyzing the possible boundary for the district and reviewing the master plan elements for those areas that already meet the requirements of TRID and those that will need additional study. Scheduling and format for the public involvement process that will include small group workshop meetings was also discussed.

A map with a hypothetical boundary was handed out for review by the committee. Mac explained that we started from the broadest standpoint that made sense and will refine as study of each building and area is completed. Committee members were encouraged to provide feedback via Angela remembering that the boundary is a work in progress. While enough area needs to be included to support proposed improvements via the value capture, we also do not want to include areas or buildings that do not make sense. Several areas in question are indicated with hatched markings. CivicVisions and Sasaki will be working on the rationale and analysis.

The zoning analysis is being completed by Sasaki based on the findings of the master plan. During the kick-off meeting, the MUST was reviewed and discussed and the team felt that it would be important to allow for "creative tension" that allows a reasonable amount of development in Bryn Mawr while at the same time is acceptable to the community. The zoning needs to have flexibility recognizing the small lots and few real development opportunities that exist in the area now. Sasaki is also working on the environmental analysis required by the legislation including water, sewer, storm drainage, pervious/impervious area, parking and transportation impacts.

Mac Nichols discussed the analysis of the value capture and the sources and uses of funds. He also explained that the legislation is broad and that a hybrid TRID/BID management entity could be considered that would have operational efficiencies. In the past, the Township has used the Redevelopment Authority of Montgomery County for the Ardmore TIF completed last year and they would be the logical entity for this purpose. The committee discussed the importance of the financial analysis, taking a conservative approach and how rating agencies would view a potential bond offering. The tax flows would have to be reviewed to anticipate the timing and possible lag between spending and revenue generation.

A prioritization method will be incorporated into this process to establish what projects can be completed and on what schedule. Septa and Amtrak will by necessity be involved in this discussion since transit improvements will be at the core of the facilities upgrades. The hand-outs will be sent to those committee members who were unable to attend the meeting.

## **5. New items**

It was agreed that the next two meetings of the committee will focus on the work of the consultants. Since this is a complex topic, the more time the committee members are able to spend discussing issues with the consultants the better understanding they will have of the process and its components. We will use the February 15<sup>th</sup> meeting to have a discussion of the TRID area boundary and rationale and the March 15<sup>th</sup> meeting will focus on proposed zoning changes and rationale.

The next meeting of the committee will take place on Thursday February 15<sup>th</sup> at 5:30 PM in the Caucus Room on the second floor of the Township Administration Building.

## TOWNSHIP OF LOWER MERION

### Ad Hoc Bryn Mawr Committee

Thursday, February 15, 2007 at 5:30 PM

#### Meeting Notes

#### **Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Charles Bloom  
Vincent DiCioccio  
Mike Fanning  
Nancy Vickers  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

#### **Guests:**

Mac Nichols, Economics Research Associates  
Brian O'Leary, Montgomery County Planning Commission  
Dave Fogel, Septa  
Rich Bickel, Delaware Valley Regional Planning Commission

#### **Staff in Attendance:**

Angela Murray  
Pat Ryan

#### I. Report from the Chairman

Commissioner Zelov welcomed everyone and reintroduced Mac Nichols from Economics Research Associates who will be leading tonight's discussion on the proposed TRID boundary and analysis. Scott asked that everyone introduce themselves since there were a number of visitors that included Brian O'Leary from the Montgomery County Planning Commission who is also a Lower Merion Township Planning Commissioner, Rich Bickel from Delaware Valley Regional Planning Commission who is the author of the TRID legislation and Dave Fogel Senior Planner with Septa.

The Bryn Mawr Merchandise and Retail Mix Plan will be presented by Midge McCauley at the monthly meeting of the Bryn Mawr Business Association at 8:00 AM on Tuesday March 20, 2007 at the Bryn Mawr Community Center. Everyone here is invited as well as encouraged to attend. Commissioner Zelov also noted that Heidi Tirjan, the Township Retail Recruiter has been showing properties to potential retailers throughout Bryn Mawr. In addition, there are several positive changes including the relocation of Carmine's from Narberth who will soon open for



lunch, and the opening of the new women's clothing store, Knit Wit in the old hardware store. Skirt will expand into the old Buckman's and the owner of the Skirt building has been working with Heidi to find an appropriate retailer for that space. The Barnes and Noble will be closing their Lancaster Avenue location. Heidi has called several of her prospects and suggested that they contact the Baker Company for leasing information.

## 2. Update from Main Line Health on hospital development implementation schedule

Commissioner Scott Zelov reported that Bryn Mawr Hospital had received Preliminary Plan approval from the Township to proceed with its Medical Office buildings, parking garage and town houses. Once a Final Plan is submitted and receives internal Building & Planning Department approvals, the hospital will be in position to begin construction. This should occur in late spring or early summer.

## 3. Bryn Mawr Master Plan TRID discussion with Mac Nichols from Economics Research Associates

Mac Nichols walked the Committee through the memorandum that presented the rationale for the district boundary and why certain parcels were recommended or not recommended to be within the boundary. Since the last meeting focused on how TRID would operate, we are focused today on the development rationale for including or excluding certain parcels that are primarily on the perimeter of the proposed boundary. It was also noted that the TRID value capture provision is basically a tax shifting mechanism that allows for infrastructure and transit improvements to be funded directly out of tax revenues from the district. Another key element is the funding for maintenance of any transit related improvements that would come from the TRID.

With zoning being a key element in the TRID planning effort, planning for density at the few key development sites available in Bryn Mawr will govern what can be achieved financially. Vacant and underutilized parcels such as Lot 7, the Verizon lot and the hospital's property around Central Avenue will be key locations for planned growth and development. Mac asked that Committee members please let us know if they agree with the suggested boundary and if they had any additional suggestions for inclusion.

In reviewing the rationale, Mac explained that the consultant team thought it important for the district to be contiguous rather than to jump over various parcels. They also thought that the institutions such as the hospital and Bryn Mawr College have strong potential for expanding their base of transit riders if the pedestrian experience was more favorable. Additionally, if a parking garage were developed privately for use by the institutions it would leave the door open to potential partnerships between them and the transit providers.

Vince DiCioccio asked how a Business Improvement District would be involved in the TRID. He noted that Pennsylvania had numerous laws that were referred to in the TRID legislation and suggested that we study how to show the nexus between the TRID and BID and how the two would be coordinated. It was noted that TRID could be an alternative way to provide funding for a BID, but that the focus would have to be on the public improvements rather than on district marketing and promotion.

Commissioner Zelov noted that in response to Charlie Bloom's question at the prior meeting about the amount of revenue that would be generated by the district, the Township Chief

Financial Officer did a brief analysis by using current assessments. Although the revenue expectations based on current assessments would not generate as much funds as we would anticipate needing for improvements, there are several planned projects that would be included in the value capture that could reasonably increase the projections. This financial plan will be completed by Economics Research Associates as part of the value capture phase of the TRID analysis. It was also noted that Montgomery County was expected to complete a property reassessment this year and that they had not reassessed this part of the County in over ten years.

4. Bryn Mawr Traffic Study-review how analysis will dovetail with TRID planning for proposed transit, traffic and pedestrian improvements

Commissioner Zelov reported that the Board of Commissioners had approved the Bryn Mawr Traffic Study contract with Gannett Fleming so that the traffic analysis can proceed at the same time as the phase two planning. The study will evaluate the level of traffic impact from the anticipated development program proposed in the Master Plan. The study will use as its base the data developed by the hospital's traffic engineers, Traffic Planning & Design, rather than conducting duplicate counts. The emphasis of this study will be on evaluating the proposed circulation changes and improvements to the street grid. Concerns were expressed about problematic pedestrian crossings at intersections on Lancaster Avenue including Merion and Roberts Roads.

5. New items

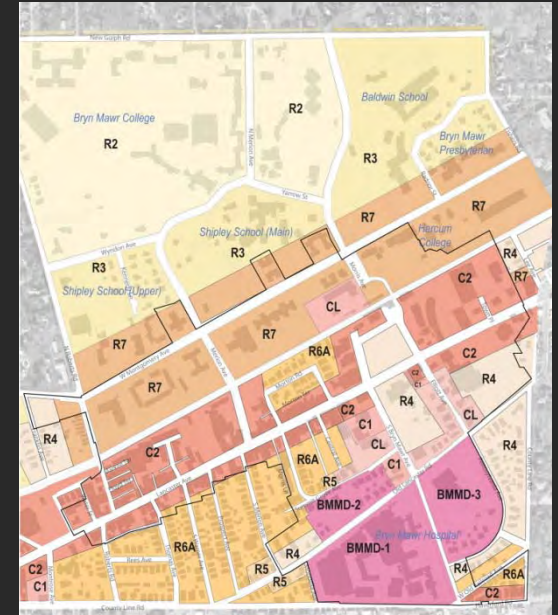
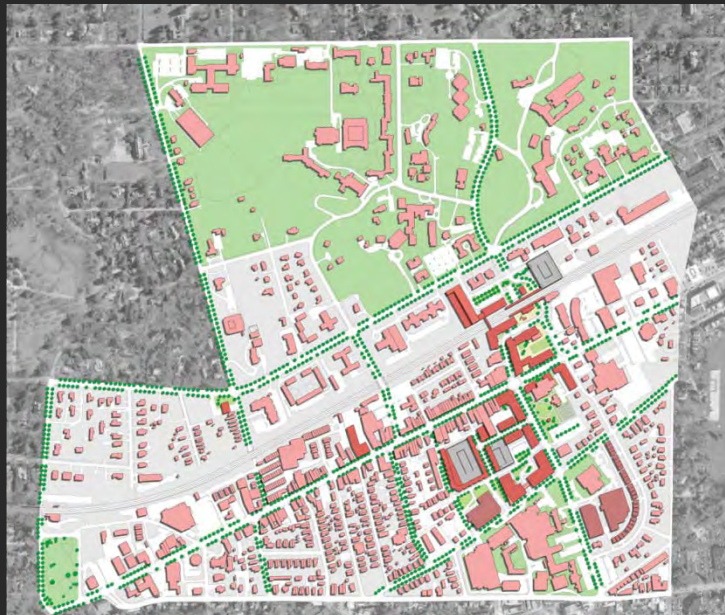
Mike Fanning announced that there would be a summer concert series taking place at the Bryn Mawr Gazebo and that the first concert in June would be dedicated to the memory of John Sabatini. Mike also noted that planning was taking place for a twilight concert in connection with future First Fridays.

The next meeting of this Committee will be focused on a presentation by Kathryn Madden of Sasaki Associates on proposed zoning for Bryn Mawr. We will provide advance information for the Committee members as soon as it is available. The meeting will take place on Thursday, March 15 at 5:30 PM in the Caucus Room in the Township Administration Building. Also, please note that the April meeting of the Ad Hoc Bryn Mawr Committee will take place on Thursday April 26<sup>th</sup>, a week later than our regular meeting date.

# Bryn Mawr Village Master Plan / TRID

# ZONING STRATEGY

14 March 2007



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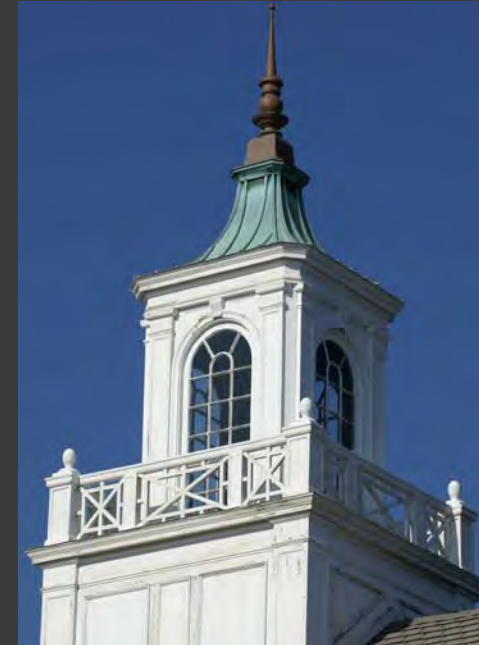
SASAKI

CIVICVISIONS

# DISTINCTIVE IDENTITY

## Contemporary Village

- Retail
- Culture/civic uses
- Architecture
- Compact mix of uses
- Transit



# LOOKING AHEAD

## Main Line Village

A forward-looking and distinctive identity based on historic town relationships and current strengths



## Civic Places

New activity and sense of place at the Station, Town Square, Community Center, Central Avenue, and Lancaster Avenue

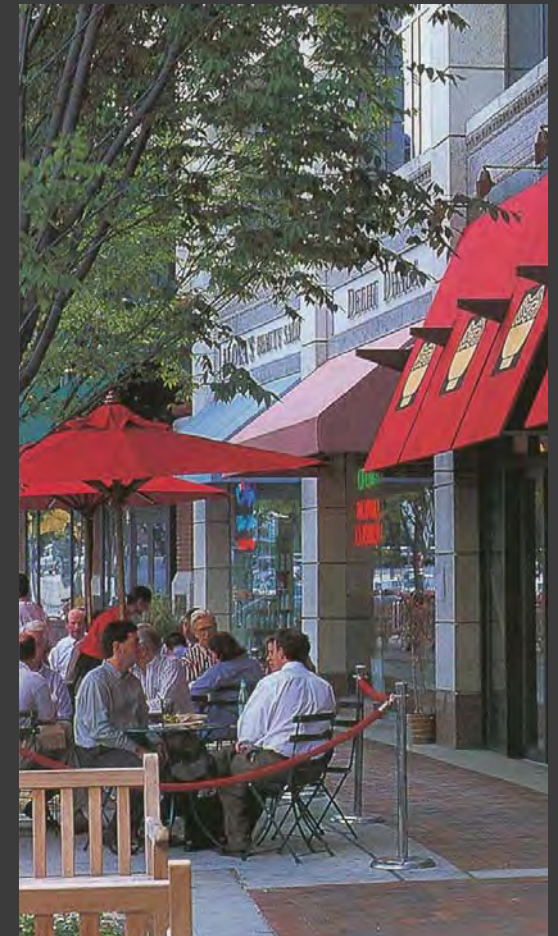


## Connectivity

Attract populations that already live, work and study within walking distance of the village

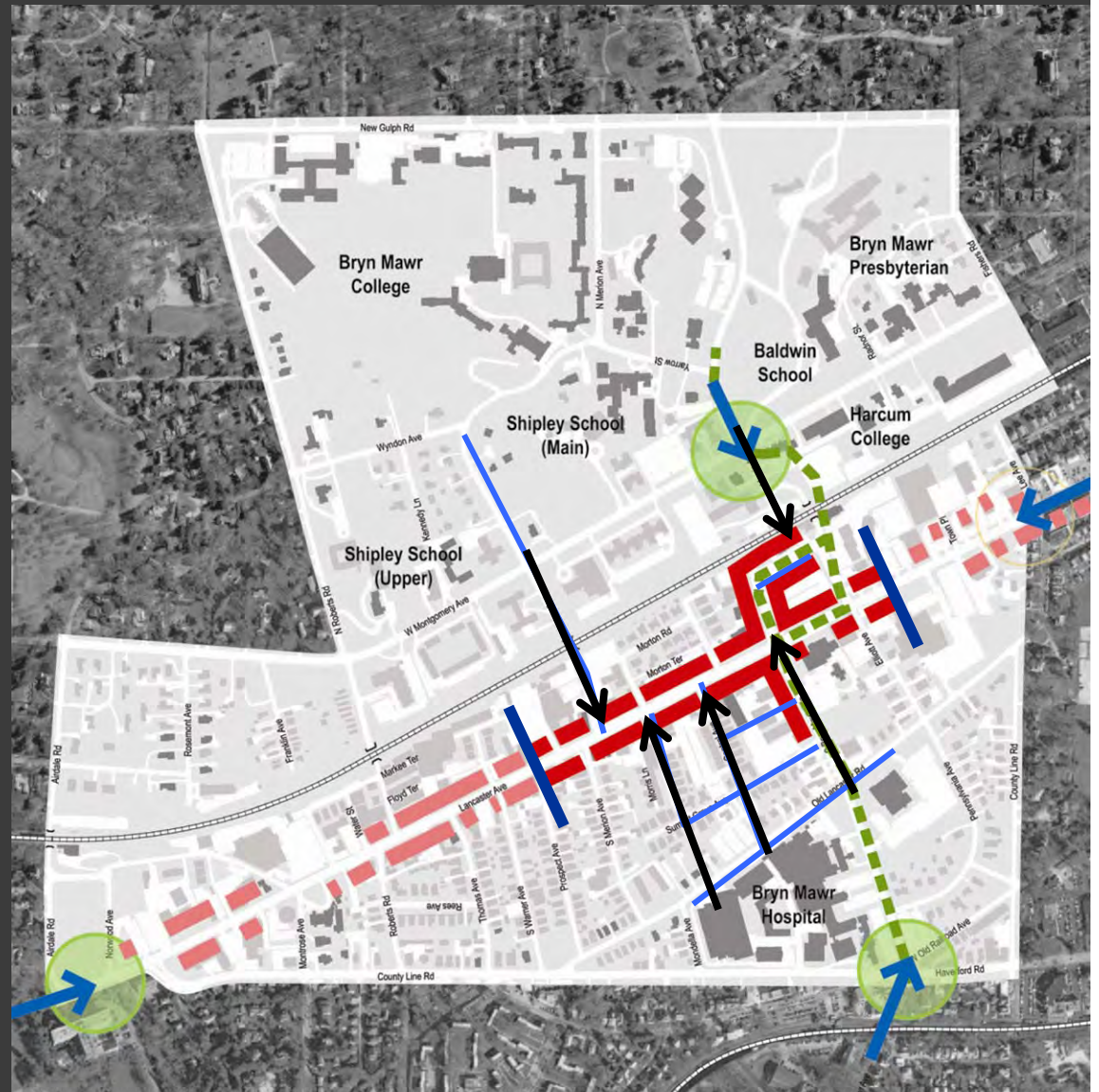


## Comparable settings



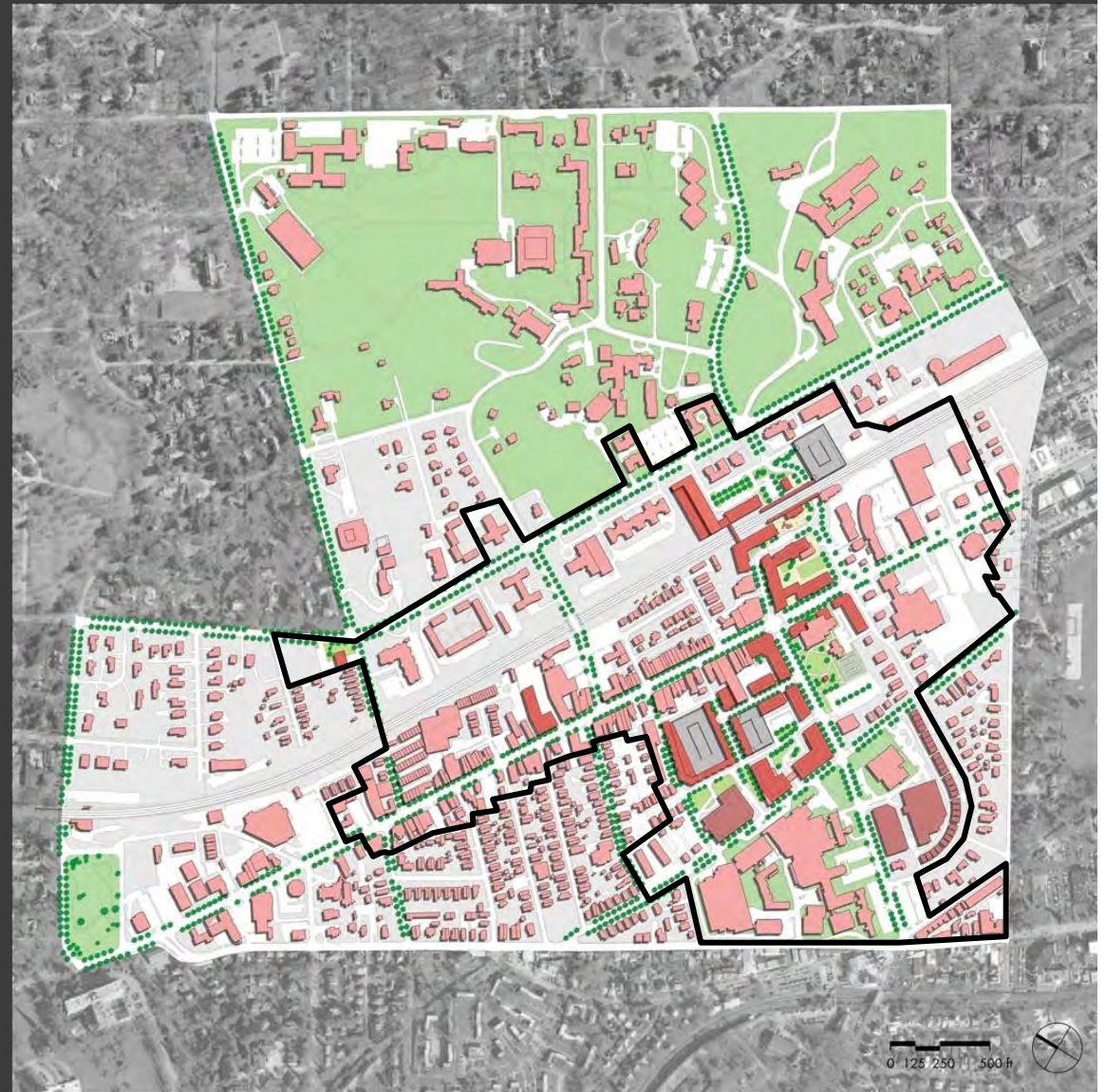
# PRINCIPLES

1. Create a network of pedestrian-friendly streets
2. Celebrate the points of arrival to the village
3. Concentrate retail on Lancaster and Bryn Mawr
4. Connect the hospital and schools to the center



# PRINCIPLES

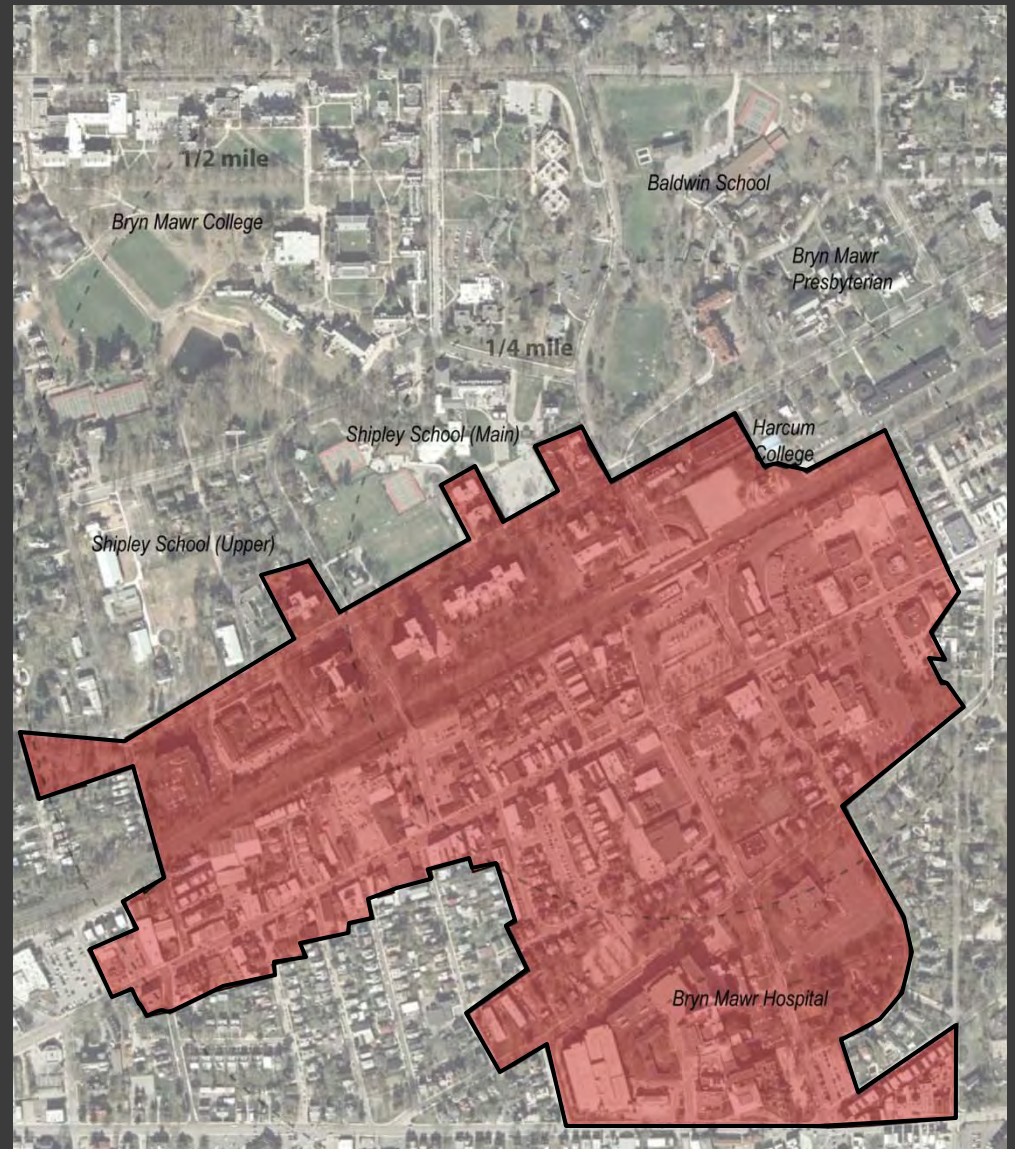
5. Encourage transit-oriented development
6. Promote a variety of housing types
7. Develop civic spaces that promote community use



# IMPLEMENTATION

## TRID Boundary

- Coherent investment district of 146 acres
- Private infill development
- Renovation and reinvestment
- Transit improvements
- Pedestrian and street improvements

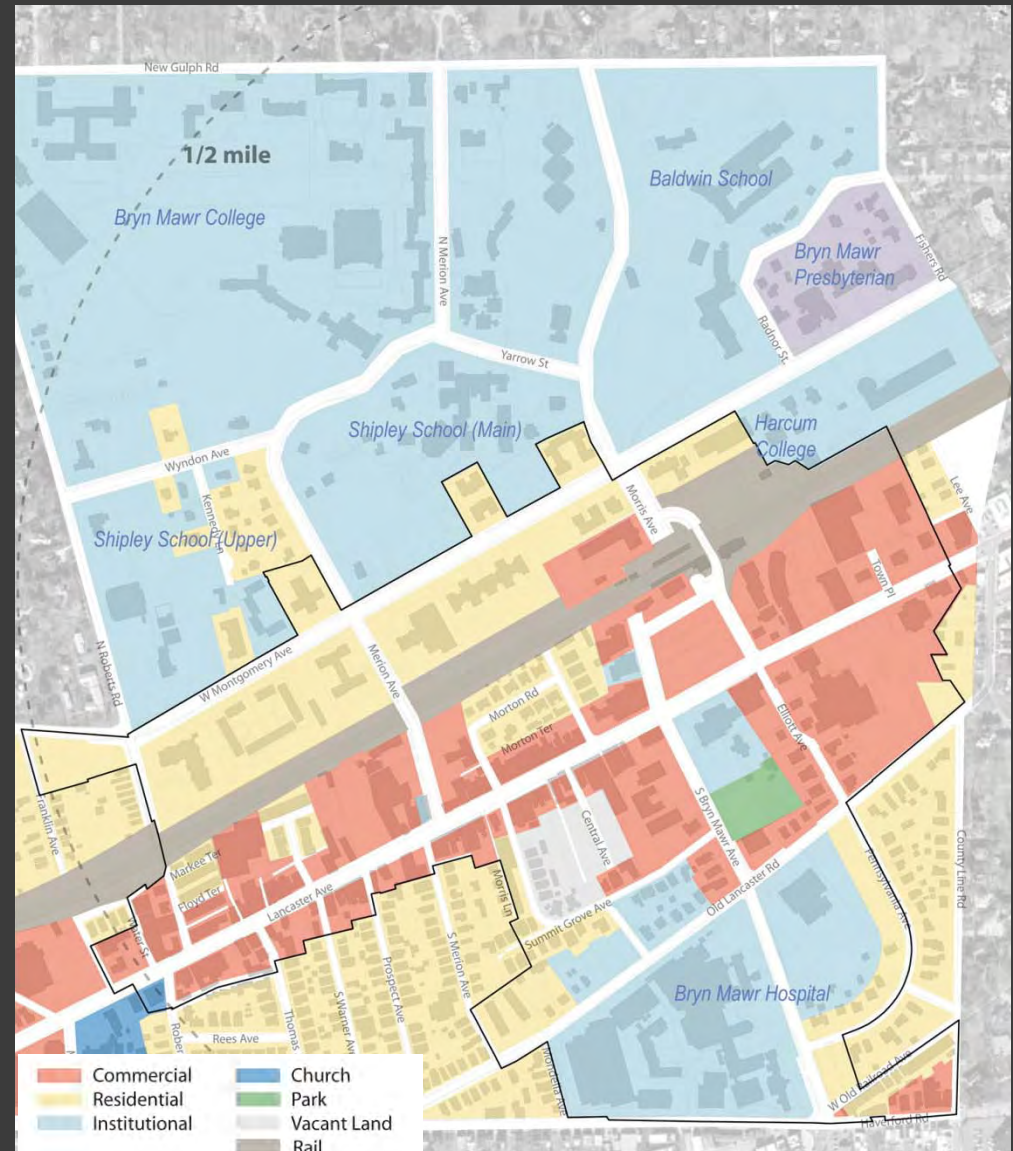




# IMPLEMENTATION

## Existing land uses

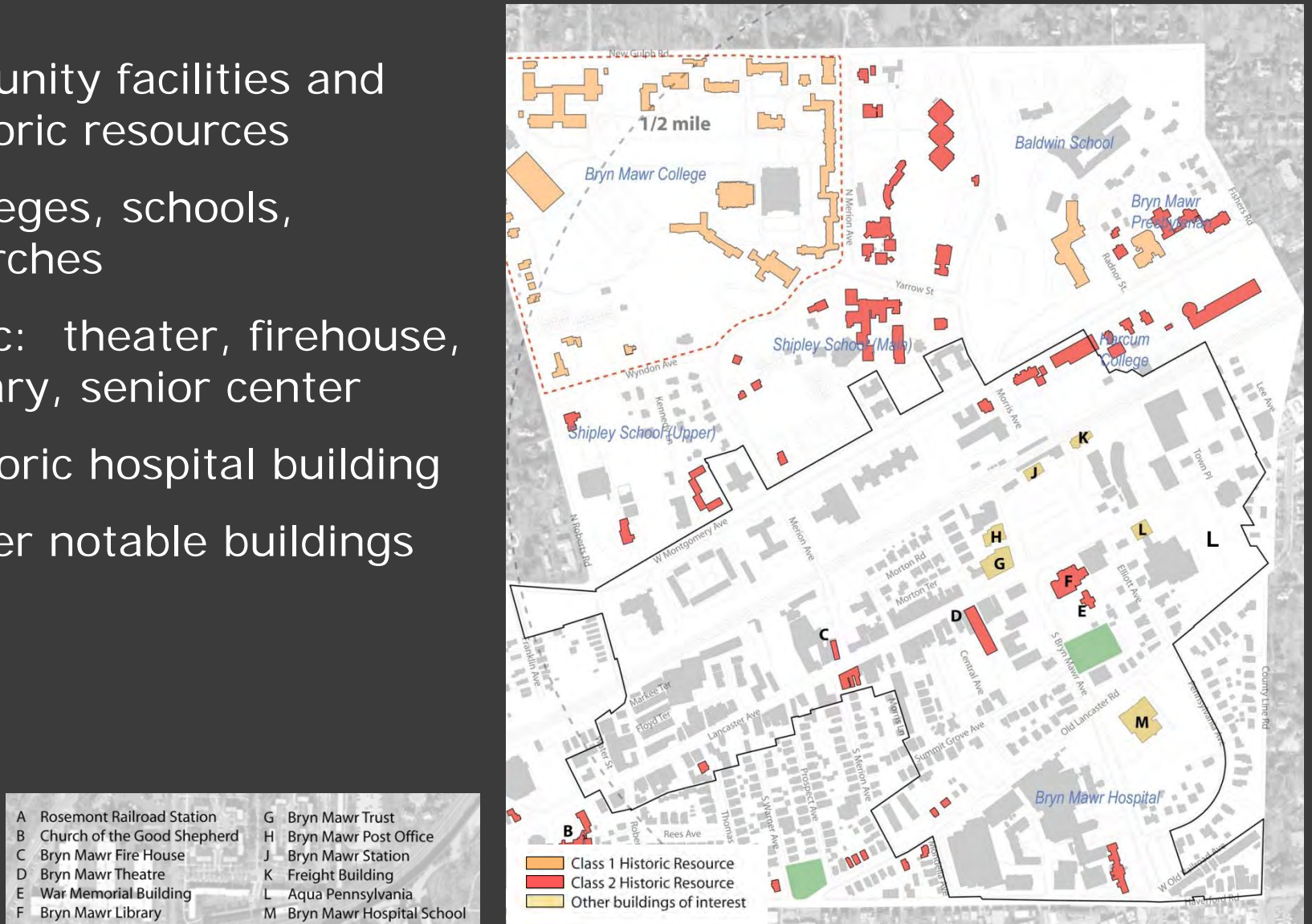
- Commercial district
- Surrounding residential
- Major institutions and churches
- Focused parks



# IMPLEMENTATION

Community facilities and historic resources

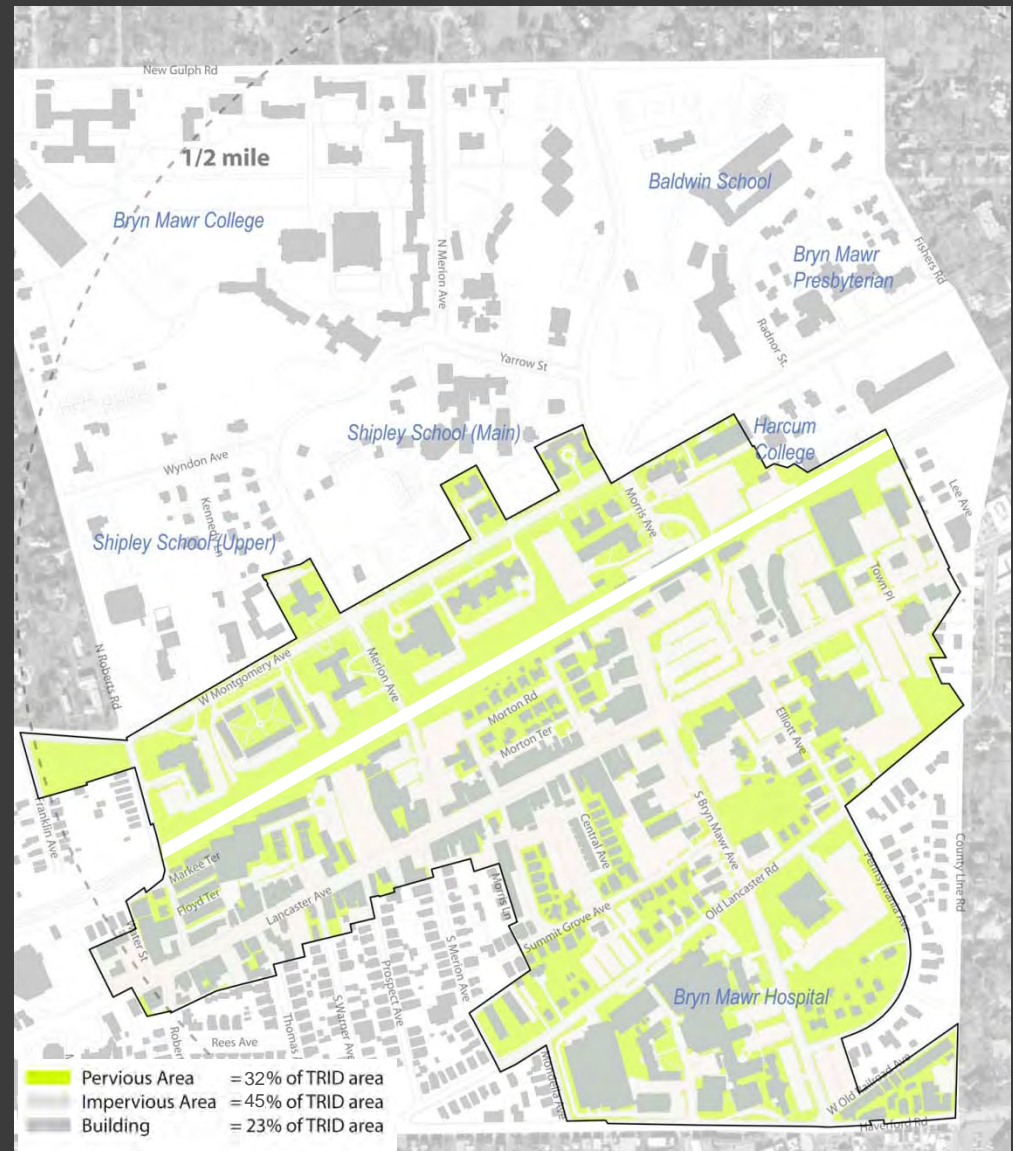
- Colleges, schools, churches
- Civic: theater, firehouse, library, senior center
- Historic hospital building
- Other notable buildings



# IMPLEMENTATION

## Pervious / Impervious Areas

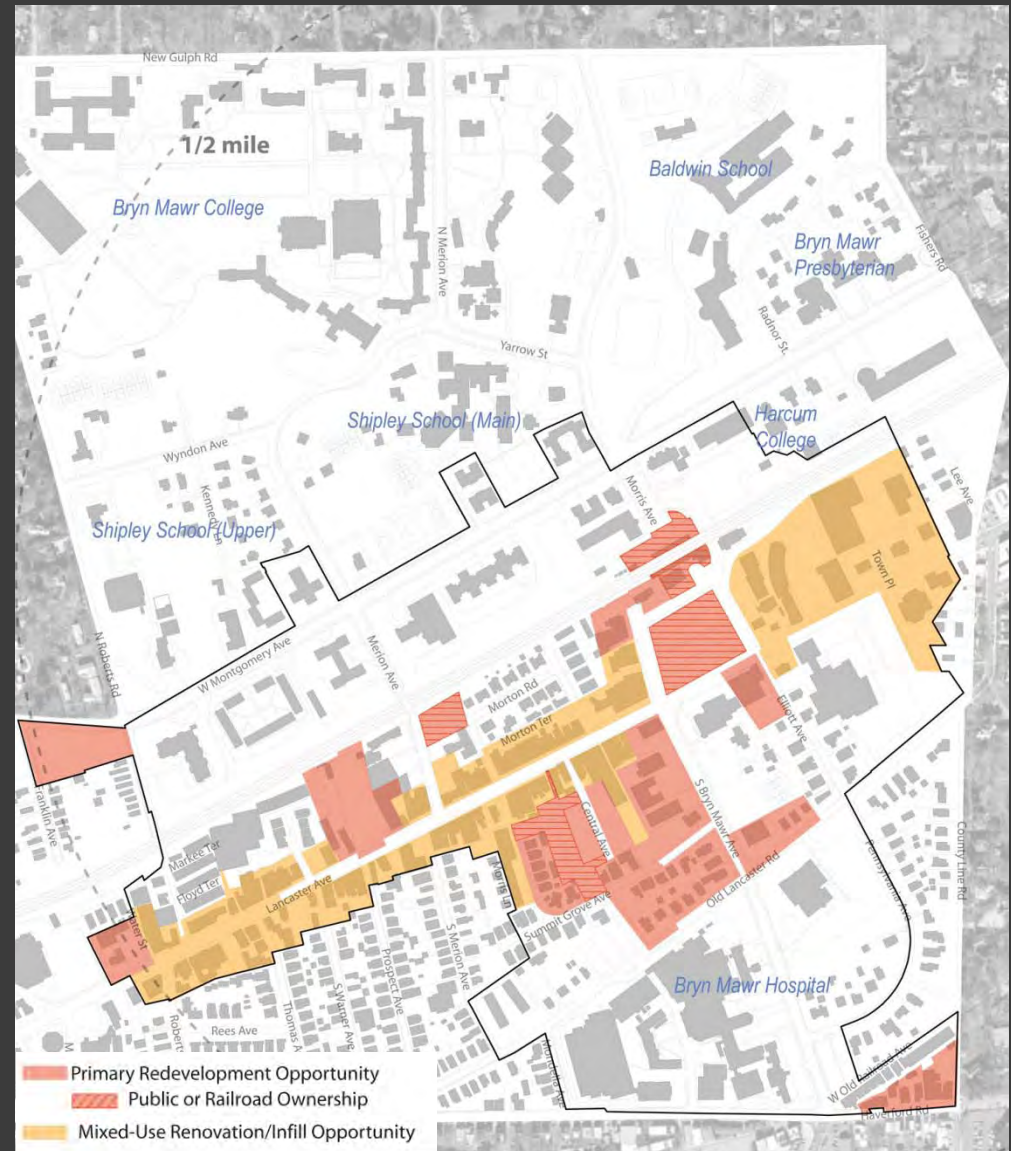
- Pervious area: 32%
- Streets, parking, sidewalks: 45%
- Buildings: 23%



# IMPLEMENTATION

Available development sites

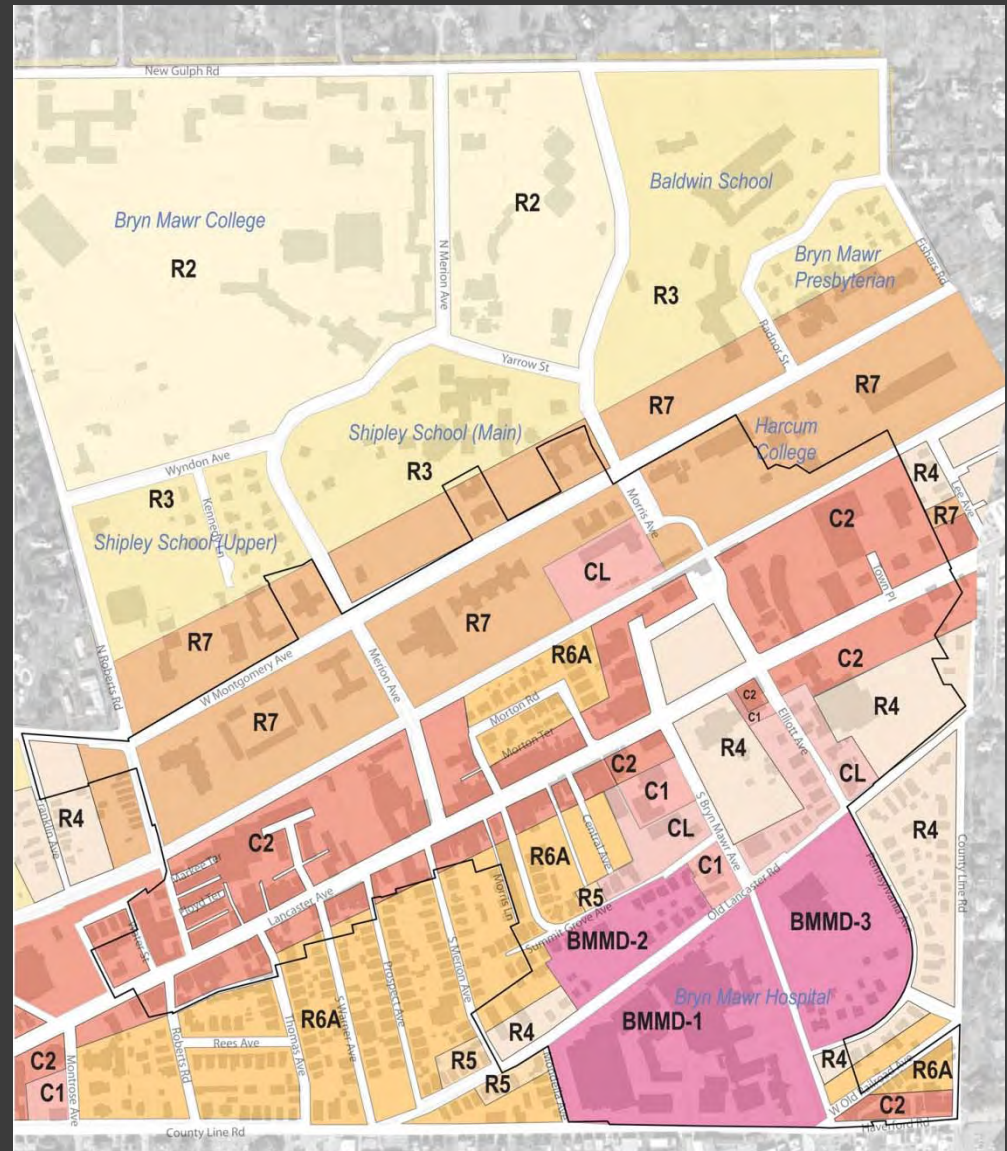
- Reinvestment/renovation areas
- Infill sites short and long term



# IMPLEMENTATION

## Existing zoning

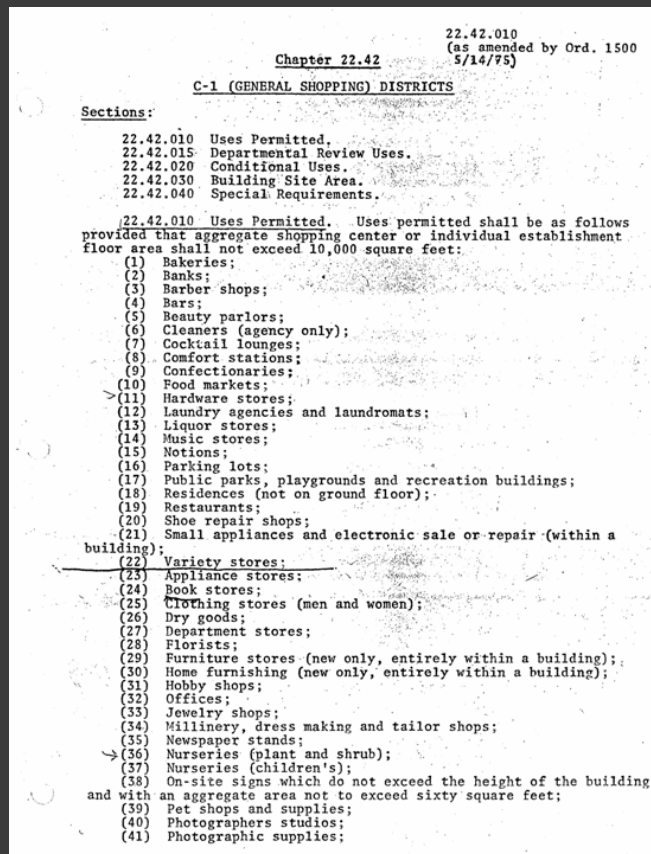
- Fragmented zones
- Range of coverages and setbacks
- Suburban rather than village standards
- Range of heights, but unachievable
- Regulations set barriers to development and quality village design



# ZONING CONCEPTS

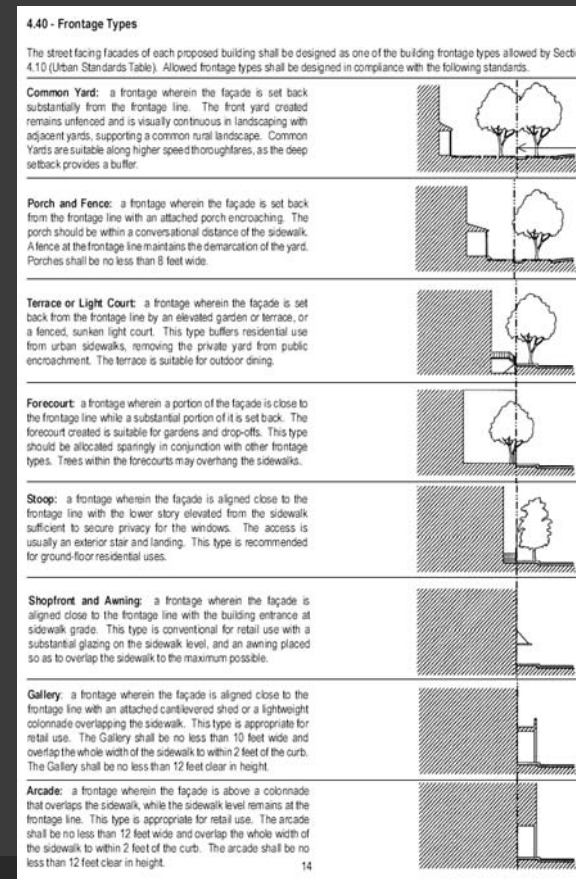
## Conventional Zoning

- Separation of uses



## Form-Based Code

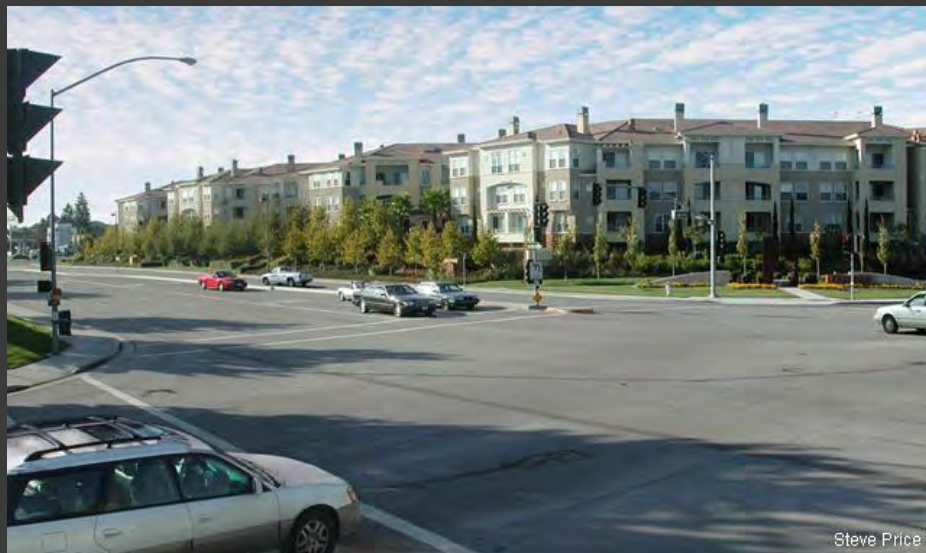
- Building form and typology



# ZONING CONCEPTS

## Conventional Zoning

- Focus on land use
- Dimensions to permit light and air



## Form-Based Code

- Building form and typology
- Design quality and character



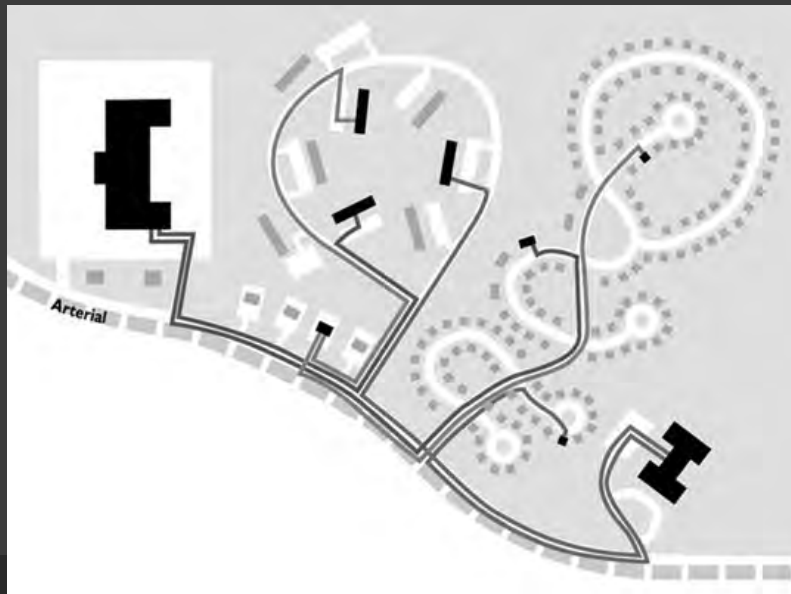
# ZONING CONCEPTS

## Conventional Zoning

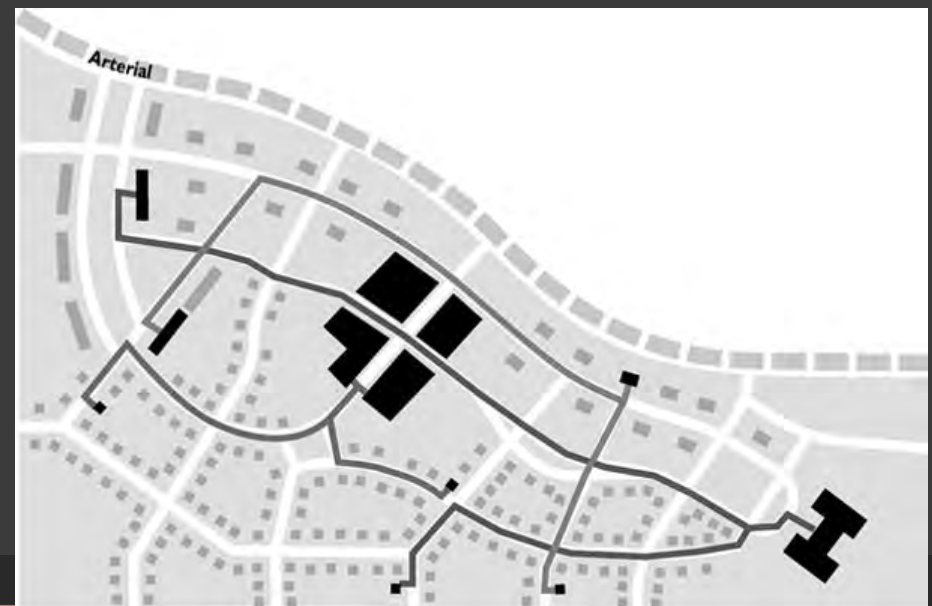
- Separation of uses
- Dimensions to permit light and air
- Prevent overcrowding

## Form-Based Code

- Building form and typology
- Design quality and character
- Define public realm



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# ZONING CONCEPTS

## Conventional Zoning

- Separation of uses
- Dimensions to permit light and air
- Prevent overcrowding
- What is forbidden



## Form-Based Code

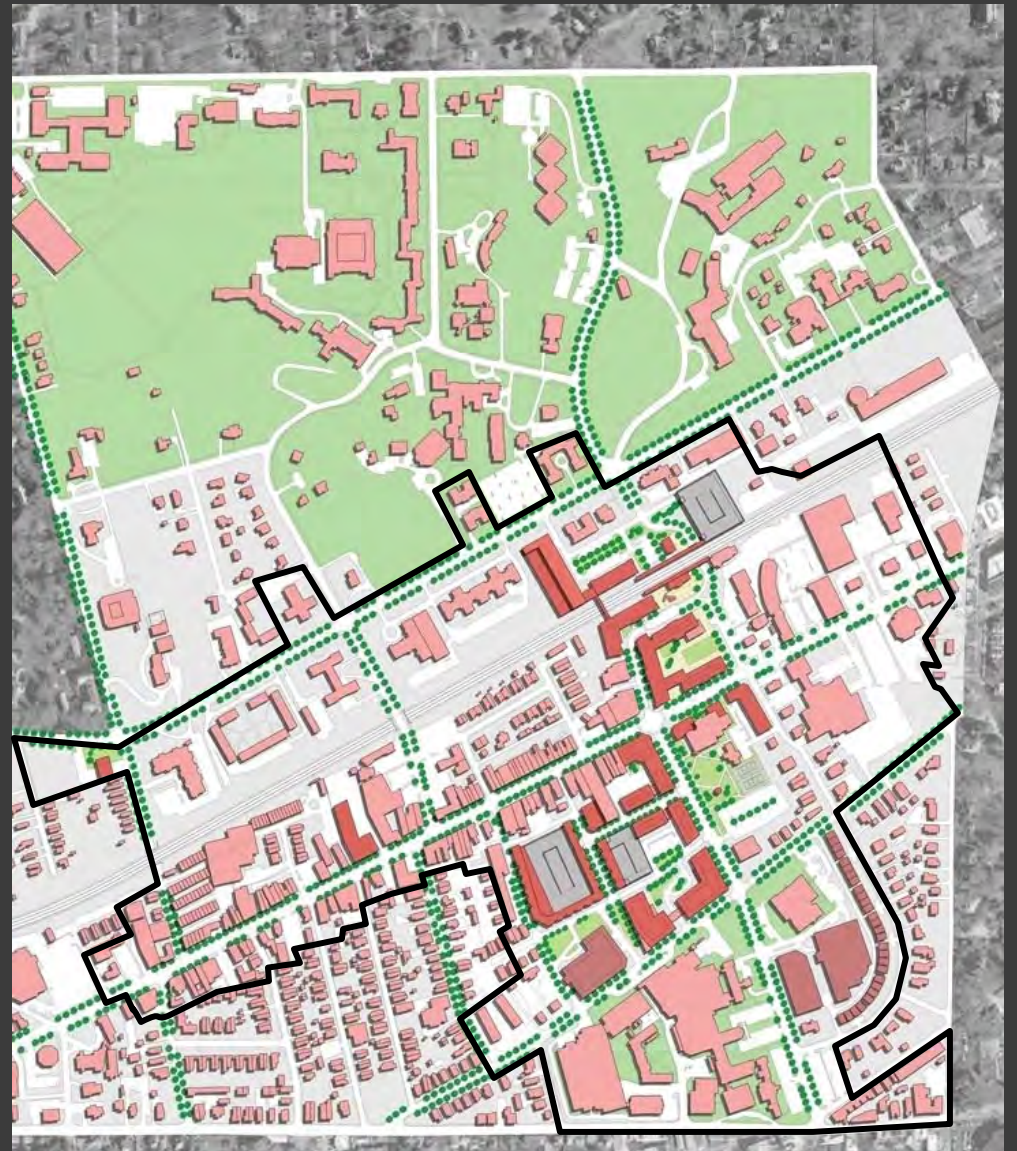
- Building form and typology
- Design quality and character
- Define public realm
- What is desirable



# ZONING CONCEPTS

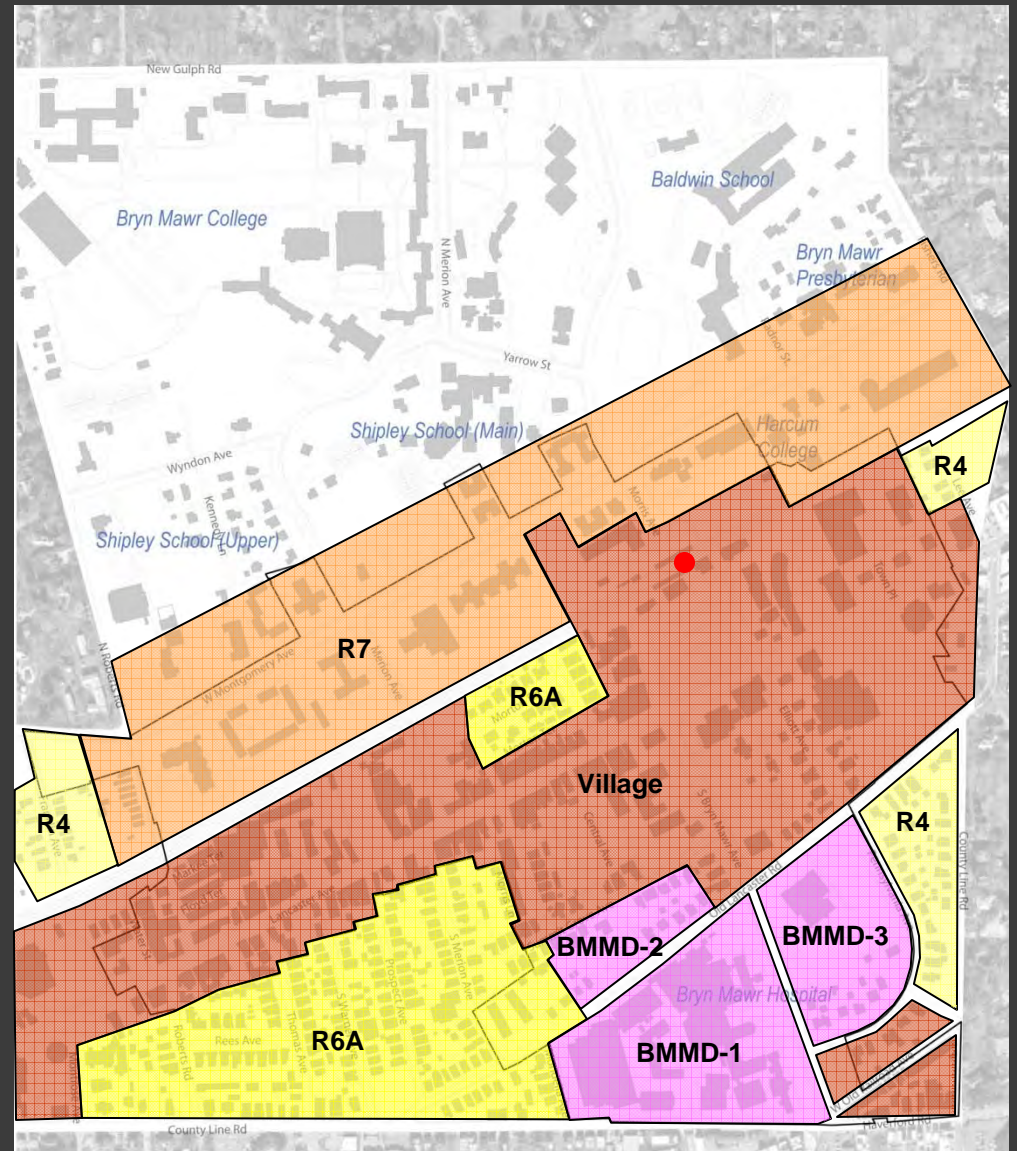
Bryn Mawr Zoning Goals:

1. Focus on desirable outcomes
2. Clarity of code
3. Streamlined review process
4. Respond to development realities



# ZONING CONCEPTS

- Create a coherent village district on underlying commercial zones with form-based zoning
- Allow for village development around Five Points
- Retain medical zones
- Retain residential neighborhoods
- Form-based overlay for R-7
- Institutional shared parking



# ZONING CONCEPTS

## Village District

- Mix of uses: retail, restaurant, office, residential, cultural, civic
- First floor retail on Lancaster and Bryn Mawr Avenues
- Consistent street wall: minimum of two to three stories
- Step-backs at upper levels



# ZONING CONCEPTS

- Build-to-lines at the street right-of-way
- Zero lot side yards
- Street level front doors and retail transparency
- Articulation of building facades and roof lines
- Impervious cover of 85 to 100 percent
- Buffer areas to adjacent residential



# ZONING CONCEPTS

Density incentives for achieving civic goals

- Workforce housing or funding
- Public parking
- Public gathering space



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# ZONING CONCEPTS

- Structured parking wrapped with retail or residential
- Shared parking
- No additional curb-cuts or drive-through uses



## Reduced Parking Requirements

- Residential 1.5/unit
- Hotel 1/room
- Retail/restaurant 3.5/1000 sf
- Office 3.0/1000 sf

# ZONING CONCEPTS

## Streamlined Review/Implementation

- Avoid conflicting requirements
- Reflect conditions on the ground in Bryn Mawr (parcel size, etc.)
- Reflect market realities
- Flexibility for changing future



# ZONING CONCEPTS

## Fears:

- Development will happen all at once
- Large projects
- Historic character
- Change
- Gentrification
- Hospital expansion
- Structured parking

# ZONING CONCEPTS

## Fears:

- Development will happen all at once
- Large projects
- Loss of historic character
- Change
- Gentrification
- Hospital expansion
- Structured parking

## Reality:

- Phased over time
- Many small owners
- Incentives to invest
- Places evolve over time
- Diversity of housing choices
- Defined outcomes
- Efficient use of land / transit oriented development

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**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, March 15, 2007 at 5:30 PM**

**Meeting Notes**

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Commissioner Philip Rosenzweig  
Susan Arizini  
Charles Bloom  
Vincent DiCioccio  
Mike Fanning  
Andrea Gilbert  
Joann Magnosta  
Nancy Vickers  
Mike Weibacher  
Pat Wesley  
Hank Wilson

**Guests:**

Kathryn Madden, Sasaki Associates  
Brian O'Leary, Montgomery County Planning Commission  
Anne Leavitt-Gruberger, Montgomery County Planning Commission  
Dave Fogel, Septa  
Rich Bickel, Delaware Valley Regional Planning Commission

**Staff in Attendance:**

Angela Murray  
Bob Duncan  
Eric Persson  
Heidi Tirjan

**I. Report from the Chairman**

Commissioner Zelov announced that on Tuesday March 20, 2007 at 8:00 AM at the monthly meeting of the Bryn Mawr Business Association meeting at the Bryn Mawr Community Center. Midge McCauley will be presenting the Bryn Mawr Merchandise Mix and Retail Strategy. He encouraged as many of the members of the committee to attend as possible.

Commissioner Zelov introduced Heidi Tirjan, the Township's Retail Coordinator who has been working with property owners to find appropriate retail uses for their storefronts. Heidi spoke about her success in recruiting Knit Wit from their old location in Narberth to locate in the former hardware store now owned by Stoltz Management. Knit Wit is a high end women's clothing store

whose flagship store is located on Walnut Street in Center City. The Bryn Mawr store is expected to open in two months. Heidi also noted that she has recruited restaurants, gourmet food stores, shoe stores and other boutiques from throughout the region to relocate or expand to Bryn Mawr. Scott noted that although Heidi officially works part time three days a week, she is on the job via her cell phone and computer throughout the week as prospects feel free to call her at any time.

Commissioner Zelov made note of a change to the community workshops. The civic association workshop will be held on Monday April 9<sup>th</sup> at 7:00 PM at the Bryn Mawr Community Center if a conflicting meeting can be moved to another location. We will advise as soon as this is confirmed. The April 23<sup>rd</sup> meeting for institutions and major property owners will be held at 3:00 PM at Bryn Mawr Trust. The previously scheduled public presentation in front of the Board of Commissioners has been moved to June 13<sup>th</sup> at 6:30 PM from May 9<sup>th</sup> to provide more time to the consultants to complete their work.

## 2. Bryn Mawr Hospital Update

Joann Magnetta reported that the hospital plans to proceed with the demolition of the homes on Pennsylvania Avenue in the spring. They plan to replicate the process that was used for the homes in the Central Avenue area. They hope to break ground for the garage in the summer and start with the Medical Office Building in the fall. The surface parking lot will proceed at the same time as the demolition.

## 3. Bryn Mawr Business Improvement District (BID) Update from Vince DiCioccio

Vince explained that work on creating a Business Improvement District began in October 2006 when the Bryn Mawr Business Association considered expanding operations. In November 2006, the Executive Director of the West Chester Business Improvement District made a presentation to the business association members on their experience in creating and managing a BID. Using Montgomery County and Township land records, Vince created a geographical data base as a starting point. From there, he conducted a Needs Assessment Survey of 100 individuals and business owners who are influential in nature. This has provided a view of what is on people's minds and what needs to be done. The next step is to draft a district plan and to have it accepted by those property owners who will contribute to it. Of key importance will be the assistance of Bryn Mawr Hospital, Bryn Mawr Trust Bank, Aqua America, Steve Bajus and Baker Properties.

Vince made note that the idea for the BID grew from the recommendation in the Master Plan to create it. Mike Weilbacher expressed concern that the concepts of the BID and the TRID could confuse people if both come forward at the same time. Vince thought that would not be the case since the BID is for Marketing and people's concerns will be capital impact. There is no assessment associated with the TRID district.

## 4. Bryn Mawr Master Plan Zoning discussion with Kathryn Madden from Sasaki Associates

Kathryn reminded the committee that at the last two meetings led by Mac Nichols, the focus was on the operation of a TRID district and how that would interface with implementation of the master plan recommendations. The TRID boundary was discussed including the pros and cons of including or excluding certain areas and properties. Kathryn noted that we still need to consider the colleges and schools for their interest in participating in the TRID.

Kathryn led the committee through a power point presentation and discussed the assets of a contemporary village and how it changes over time. This includes its character, mix of uses, connectivity, the station, streets and pathways. She reviewed the available redevelopment sites that would allow for the capture of value critical to the success of the TRID concept. New development and investment as well as adaptive reuse will be improvements that occur over a long period of time in the district.

For an area that is coherent as a place, the range of uses does not promote cohesive high quality design. One story buildings with blank walls should be considered opportunities and throughout the district, building heights range from 35 to 65 feet. Impervious cover is 66% and pervious is 33% although much higher in the business district.

Kathryn discussed the evolution of zoning codes since Euclidean zoning came into being in 1926 as a way to separate uses in the days when there were heavy industries next to tenements and light and air were paramount concerns. This resulted in layering and fragmentation of zones and suburbanized zoning with set backs and restrictions that don't preserve 19<sup>th</sup> century village design. She suggested that the Township take a form based approach rather than the conventional that focuses on what is forbidden rather than what is desirable. The outcome of new zoning should be clarity in application, streamlined review and responsive to development realities. The code should respect existing buildings while balancing the cost of land and the small number of parcels that could be redeveloped.

Kathryn presented her preliminary thoughts proposing zoning that collapses the commercial district into a core Village Zone. It will be important to extend the Village character along the north/south axis along Bryn Mawr Avenue from Five Points to the station. The existing residential would for the most part be maintained but consider including R7 since those are closely aligned to the district. Rich Bickel suggested that the R7 should become part of the Village zone. The question of storm water runoff and catch basins was raised as was the question of how best to treat impervious surfaces within the new zones.

Commissioner Rosenzweig noted the significant number of institutions and the benefits and trade-offs attendant to being even handed in our approach. It may be a good opportunity to solve collective problems with shared opportunities. Hank Wilson cautioned that the neighbors have to be thought of in concert with any expansion of the institutions. However, it was noted, that there is very little area for institutional expansion other than vertically. Bryn Mawr College President Nancy Vickers emphasized that the college has no plans to expand beyond their campus.

Kathryn explained that her focus is on developing a coherent list of what is need such as first floor retail, consistent street wall, base of two to three stories, buffer around the residential, etc. Phil Rosenzweig expressed his positive view that a concentrated effort to "nail the zoning" is the way to proceed with another meeting with Kathryn and the entire team of consultants in a workshop format to build consensus among the committee members. Phil further noted that how best to zone Bryn Mawr Village is the key piece and will need much more work. While MUST was well intentioned, it does not work. He thought there were positives and negatives to creating overlays such as those areas where neighbors and schools flow together and fragmented ownership in the business area need to merge positively.

Brian O'Leary noted that this direction is consistent with the Town Center model ordinance created by the Montgomery County Planning Commission as well as with the County's Comprehensive Plan. Andi Gilbert supported the suggestion that the next meeting of the Committee be a workshop devoted to the issue of zoning for Bryn Mawr. She felt that with the

major constituents in the room, residential, business and institutions, a cogent discussion could be held resulting in a plan of action. Charlie Bloom asked if it had to be an overlay versus a straight rezoning. Bob Duncan clarified that while a rezoning could be done, architectural design standards were easier to achieve through an overlay. It would also be very difficult to create a legal description for such a large area. The First Class Township Code provides a number of limitations that make it difficult to rezone. Charlie further noted that it is more important to get this right than to try to keep on a strict schedule.

Pat Wesley told President Vickers what a great neighbor she believes Bryn Mawr College is with the Gateway Building, the Louis Kahn building and the thoughtful redevelopment of historic buildings on the campus. She agreed that it was important to take the time needed to look at all the issues particularly in view of the big construction projects that will be taking place in the near future. She felt it was important that the concerns of residents be paid attention to.

Scott Zelov agreed that the schedule is less important than the process and that the outcome be supported by the majority of residents and businesses. Scott lent his support to using the next meeting of the Ad Hoc Committee for a zoning workshop with all the consultant team in attendance. Angela Murray agreed to contact the other consultant team members to be sure that they were available for this meeting.

5. Projected dates for small group workshops to be conducted by CivicVisions

- Monday April 9<sup>th</sup> – 7:00-9:00 PM Community Representatives
- Monday April 23<sup>rd</sup> – 3:00-5:00 PM Business and Institutional Representatives

The next meeting of the Bryn Mawr Ad Hoc Committee will take place on Thursday April 26<sup>th</sup> – 4:00-7:00 for a Zoning Workshop meeting. The meeting will take place in the Caucus Room and a light dinner will be provided.

## **Bryn Mawr TRID Planning Workshops**

Two Bryn Mawr TRID Planning Workshops were held in April 2007 to fulfill part of the community outreach required by the TRID planning legislation. The workshop information is used to inform the planning team to consider how TRID and zoning might benefit the community. More than a year has passed since the Masterplan Charette's community outreach process. Gathering community information is an on-going process and must be up-to-date to be effective. Workshops are a method of eliciting individual voices about how people perceive aspects of Bryn Mawr's identity. Forty-five people participated in the workshop process.

### **Civic Association Workshop April 9, 2007**

#### **Participation**

There were twenty-seven Civic Association workshop participants. They primarily represented two neighborhood groups: The Bryn Mawr Hospital neighbors and the Baldwin School neighbors. It was noted that these two neighborhoods were sites of community advocacy formed against the expansion of these two institutions. While the information gathered represents the opinions of those participating it would fair to say that this represents the Civic Association but unfair to say this represents all of Bryn Mawr since:

- >The representation of the Civic Association participants was limited to two neighborhoods;
- >The Civic Association was responsible for inviting participants. There is no public link or contact information listed on the Lower Merion website for community organizations to broaden the participation.

#### **Process: Maps**

Participants were first asked to draw a map of what they do on typical "Saturdays" (or days off when they have free choice about where they go). They were asked to indicate destinations and how they traveled to get there.

This kind of map is called a "cognitive map." Its importance is not in its accuracy, way finding or artistic composition but rather in how it represents the mental conception of how people organize information about their environment, the spatial patterns of how people construct their lives and the destinations noted.

The maps revealed:

1. Lancaster & Montgomery Avenues are prime organizers of how people see the place whether going to national chains, big boxes or small local stores.
2. Very few represented Bryn Mawr as the cross roads of Bryn Mawr Avenue and Lancaster Avenue. The continuous linear order of Lancaster Avenue prevailed.
3. People live regionally by the car: east to Ardmore and west to Wayne and King of Prussia.
  - >Driving is the primary mode of transportation.
  - >Some showed a combination of driving and walking from home to Lancaster Avenue destinations in Bryn Mawr.

>Very few used the train but many organized their world by destinations defined by the station stops.

4. An assessment of the convenience of parking and traffic is noted as destination criteria on one map:

>Good parking available in Wayne, at Spread Eagle Village and the Wayne Farmers market;

>Bad traffic in Bryn Mawr—avoid;

>Impossible to get into the parking lot at Starbucks in Bryn Mawr.

This tells us that convenience, ease of trip and time expended to get there are important aspects of what makes a good destination.

5. Destinations ranged from national chains, big boxes and small local stores to civic amenities such as the library, churches, bank and post office.

>The Bryn Mawr Film Institute was a common downtown Bryn Mawr destination but none of the stores represented in the business workshop appeared on the Civic Association maps.

>Food is the destination that cuts across all demographics. This appeared as grocery stores: Food Source, Acme, Whole Foods and Farmer's Markets but not as restaurants.

6. Other destinations included regional shopping such as Suburban Square, King of Prussia and downtown Philadelphia. One map noted New Jersey and New York city.

7. Local institution campuses were noted as leisure amenities, valued for open space, recreation, walking and tennis but the questionnaires also noted that these same institutions were viewed as expansion threats.

>Note that if institutions are considered part of the quality of life for a community then they have to remain vital and be able to change and grow in response to their peer groups or they will become less competitive and decline.

#### **Summary: What we learned from the maps:**

1. Lancaster Avenue (and to a lesser extent Montgomery Avenue) organizes life;
2. People live regionally by car: east to Ardmore, west to Wayne & King of Prussia;
3. Institution campuses are leisure amenities, valued for open space recreation, walking, tennis while viewed as expansion threats;
4. Food shopping most common destination: Acme, Food Source, Whole Foods, farmers markets, liquor store;
5. Bryn Mawr common destinations: BMFI, post office, bank, library, Suburban Hardware. Shops of business owners group did not show up on maps.

#### **Process: Bryn Mawr's Audiences**

To understand a place it is important to understand its present audience and the audience that it wants to attract as it evolves. While demographic information may provide quantifiable information, how a place works to support desirable lifestyles or detracts from them and, how a place is perceived by insiders as well as outsiders are equally

important to building knowledge about an area. There are a lot of different groups that make up a community. Sometimes they are defined by the institution they are part of such as Bryn Mawr of Baldwin or where live or work or by interests they share. This is a *perception*, not necessarily fact.

Participants answered a series of questions. The first group of questions revealed how they perceived the audience types that Bryn Mawr attracts. These were very generally described as:

- >Students
- >Middle-aged, educated, wealthy professionals
- >Main Liners
- >Locals
- >Shoppers
- >Civic institution-goers

While the groups noted are all part of Bryn Mawr's demographics the descriptions were more stereotypical and not nuanced. By contrast, see the way the business owners described Bryn Mawr's audiences.

### **Process: Bryn Mawr's Strengths/Weakness/Threats/Opportunities**

Places can be seen from the inside with informed, nuanced understanding or from the outside with broad-stroked clarity that highlights the obvious. Key strengths and weaknesses, opportunities and threats were grouped into broad categories that describe the perceptions about Bryn Mawr noted by workshop participants.

- >More weaknesses were noted than strengths.

The categories are described separately: weaknesses on the left; strengths on the right. The comments are excerpted from the questionnaires.

### **Qualities of Place: Perceived Strengths**

---

#### *Walkability/Transit/Convenience: 67%*

- Walkable, walkability, wonderful places to walk and bike
- Trains, easy commute, R-5 going east & west, transportation, easy access to train & Philadelphia, good location
- Convenience to Center City via car & train

#### *Good Environment: 67%*

- Small Scale, easy access to stores, banks, restaurants, easy access to particular types of shopping
- Residential town center, quiet residential neighborhoods
- Density, density of population
- Size, little village feel, residential village, low-rise, small town feeling, centralized commercial district, shopping area in walking distance, central location of post office, library, banks, Septa
- Beautiful community (trees & housing), homes, residential areas
- Closeness/proximity
- Mixed use



History  
Convenience  
Mixture of architecture  
Major trees  
Sidewalks, gazebo  
Great township services  
Great school district

### **Qualities of Place: Perceived Weaknesses**

---

#### *Traffic/Roads: 33%*

Major Highway through town  
Traffic Volume  
Noise  
Route 30 is much too narrow  
Too much pavement; not enough green  
Traffic  
Busy traffic on Lancaster Avenue  
Finite/condensed road network  
Too many cars  
Crowded streets: poor road condition  
Too much car traffic

#### *Lack of Parking: 30%*

Parking in shopping area  
Insufficient parking for shop owners  
Parking  
Not enough off-street parking  
Lack of parking closer to shops  
Not enough parking to attract shoppers  
Perceived lack of cohesive planning structure for traffic & parking  
Too much traffic flow  
Lack of parking spaces  
Not adequate parking

#### *Poor Streetscapes: 19%*

Lack of cohesive streetscape identity  
Lack of sidewalks in areas to walk safely  
Lack of building maintenance by building owners  
Poor walking design  
Absence of sidewalks  
Narrow sidewalks

#### *Poor Infrastructure: 7%*

Drainage, Sewage  
Water run-off at intersections  
Dirty, clogged gutters  
Poor storm water design

## **Commercial Amenities/Development: Institutions: Perceived Strengths**

---

### *Good Retail: 19%*

Little family-owned businesses, good services, some interesting & unique shops, great specialty shops, good restaurants, variety of stores & restaurants, unique retail mix: major fashion, violin maker, rare books, historic paint conservator

## **Commercial Amenities/Development: Perceived Weaknesses**

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### *Lack of Retail: 22%*

Need more retail  
Need more office development  
Need more restaurants (often go to Philadelphia to eat)  
Not enough magnets & anchors like Bryn Mawr Film Institute  
Needs more big stores to attract shoppers (this will help small business)  
Needs more restaurants (please look into Panera)  
Small & limited grocery stores  
Too much of potential first floor retail is banks, offices, medical facilities, nail salons  
Not enough stores and area devoted to retail goods and services  
Lack of music venue (The Point)

### *Under-development: 11%*

Underutilized center of town (Lot 7, please!)  
Not enough space for needs of various institutions  
Existing structures do not fit market demand

### *Over-development: 7%*

Too many Strip Centers  
Too much overbuilding changing community character

### *Lack of Employment: 4%*

Not enough places to get decent job that goes with educational background

## **Institutions: Perceived Strengths**

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### **Strengths**

#### *Cultural Destinations: 30%*

Community Film Institute, Library, Bryn Mawr College, Bryn Mawr Presbyterian Church, Bryn Mawr Redeemer Church

#### *Institutions 30%*

Colleges, many educational institutions, good colleges, Shipley & Baldwin, great school district, Bryn Mawr Hospital (good doctors),

### **Institutions: Perceived Weaknesses**

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*Hospital Growth: 4%*

Overbearing sense of importance of Bryn Mawr Hospital in entire scheme of things  
(without town where is hospital?)

### **Residents: Perceived Strengths**

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*Residents: 33%*

Affluent Community  
Intelligent neighbors  
Safe community  
People in the community, interesting people, diversity in ages, lifestyles (many students)

### **Residents: Perceived Weaknesses**

---

*Lack of affordable housing: 15%*

Lack of affordable housing  
High real estate values--lack of affordable housing  
South of tracks not quite living in a neighborhood; feels like place where Suburban  
Water could just take over

*Residents: 11%*

Too many college students  
Weak business association: limited membership, limited funds  
Shop owners lack time & interest in total community concept (only interested in  
10am-5 pm)  
Absentee landlords

*Economic Conditions: 11%*

High Cost structure  
Insufficient investment financially and personally  
Real estate taxes rising too rapidly as result of new high school building project

Like the strengths and weaknesses categories, there were more threats noted than opportunities. The categories are described separately: threats on the left; opportunities on the right. The comments are excerpted from the questionnaires.

### **Commercial Amenities/Development: Institutions: Perceived Opportunities**

---

*Improve Commercial: more/better stores & restaurants: 41%*

Excellent commercial opportunities  
Keep businesses healthy  
Small Business friendly  
Retail  
Better restaurants & shops  
Increased retail/commercial  
Shops  
Movie theater  
Can own a business in a well-known town

- Improve range of businesses/services
- Attract new stores & shops especially with larger variety of merchandise for young adult & teen shopping
- Benefit of Lancaster Avenue traffic passing by stores
- Make shopping area more attractive with awnings & greenery & large flower pots
- Fill every vacant store
- Do a better job of marketing the business opportunities
- Plan more event days & activities

*Improve Culture: live music & entertainment: 19%*

- Cultural, movies, art, theater, entertainment, fashion
- Good eating, film institute, library, hospital/doctor offices, First Fridays
- Live music & entertainment
- Outdoor entertainment
- Bryn Mawr twilight concerts
- Bring back The Point
- Health care, education, entertainment

*Develop Lot 7, Verizon lot, station, village: 15%*

- Parking Lot 7 & whole area around: old village style; green space & plantings
- Parking Lot 7
- Corner of Bryn Mawr & Lancaster Avenue
- Better ways to use Lot 7
- Train station
- Development of village
- Verizon Lot development

*Improve offices/services: 7%*

- Office development
- Hospital growth
- To become more developed as a center for services

**Commercial Amenities/Development: Institutions: Perceived Threats**

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*Development as threat : 22%*

- More development
- Overdevelopment
- More development & buildings especially if oversized structures
- Overdevelopment of business district encroaching on residential areas
- Imprudent re-zoning that does not adequately protect neighborhoods
- Overdevelopment
- More commercialization
- Becoming too commercial
- Commercial/Retail
- Too dense, too high

*Institutional expansion: 22%*

- Institutional expansion to detriment of residential communities
- Too much development by private schools and colleges overtaking neighborhoods
- Take over by hospital
- Overdevelopment of hospital
- Construction expansion of hospital
- Large operators (Water Company) will move in and destroy the character and traffic patterns making it impossible to get around

*Lack of development as threat: 11%*

- Empty stores depressing
- Lack of mixed-use development
- Lack of retail
- Lack of businesses
- Business are moving out
- Lots of empty shops
- Lack of hotel for nearby colleges & schools
- Threat of remaining stagnant
- Needs growth to attract new vibrant businesses with aggressive forward thinking ownership

*Lack of Vision: 11%*

- Philadelphia's poor management
- Lack of vision
- Infatuation with grand, very large scale, massive projects
- Aging infrastructure

**Qualities of Place: Perceived Opportunities**

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*Walkability/Transit Access: 11%*

- Walkability
- Parking signage
- Easy access to train

*Good Environment Assets: 11%*

- To develop as a village in a residential context
- Sensitive revitalization
- Increase village look
- Not much opportunity because town is not very large

*Misc. Improvements: 11%*

- Pocket parks
- Historic district
- Green Building

## **Qualities of Place: Perceived Threats**

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### *Loss of Identity: 26%*

- Itself
- Becoming too fashionable
- Loss of identity (Bryn Mawr is not Princeton Junction)
- Overspecialization: catering only to high-end interests
- Loss of community cohesion
- Not building from the strengths that exist
- Modern-looking structure invading old Bryn Mawr

### *Threats from traffic/roads: 26%*

- More traffic
- Route 30
- Traffic from hospital building & expansion
- Narrow sidewalks next to Route 30
- No speed controls on Lancaster Avenue
- Increased vehicular traffic

### *Threats from lack of open space: 15%*

- Not enough green
- Lack of open space
- Overdevelopment of remaining open space
- More impervious surface

## **Residents: Perceived Opportunities**

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### *Improve Residential realm: 15%*

- Live/work units
- Home ownership
- Rental apartments
- Workforce housing
- Reach out to variety of residential groups

## **Residents: Perceived Threats**

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### *Threats from Resident Mix: 19%*

- Cultural & economic diversity is disappearing
- Ethnic cleansing (may be forced to move)
- Lock of families
- Unruly students
- Too many college students

### *Lack of Affordable Housing: 15%*

- No affordable housing
- Loss of low income housing
- Lack of affordable housing
- Lack of rental and student housing

*Economic Conditions: 7%*

- Rising taxes from high school construction
- Lack of sources of employment
- Lack of building ownership by store owners

The final set of questions tried to distill a direction for Bryn Mawr in a succinct, single statement of individual imagination about what changes might be desirable, what different audiences these changes might attract, how these changes might affect how Bryn is perceived and what Bryn might become.

- >Desire to have a vibrant community with increased amenities: retail and restaurants, was far greater than those who fear change.

### **Business-Owners Workshop April 23, 2007**

#### **Participation**

There were eighteen business-owners workshop participants. Two primary groups were represented: retail businesses and real estate businesses. While the information gathered represents the opinions of those participating it would fair to say that this represents primarily businesses in the 800 block of Lancaster Avenue but unfair to say this represents all of Bryn Mawr businesses. Restaurants and stores in newer retail forms such as strip centers were not represented.

#### **Process: Bryn Mawr's Audiences**

For retail businesses it is important to know the audiences attract (or that they want to attract) and then to assess how the present environment supports or detracts from this. Knowledge of the present audiences and the audiences that are desired can be important in framing how Bryn Mawr will evolve. The Civic Association described Bryn Mawr audiences as a *perception*, not necessarily fact. The business owners however have more specific knowledge of their actual customers and are based on actual experiences. Their answers reflected this in rich detail.

The audiences were very generally described in similar categories to the Civic Association but the emphasis here is on the affluence and education of their customers and nuanced descriptions of their lifestyles. These descriptions are coincident with the demographic data of the Bryn Mawr area.

From the discussion and questionnaires we learned that there are two primary categories of audience groups:

- >Bryn Mawr's affluent educated households
- >College students & parents

Two primary groups comprise the Bryn Mawr households:

- >Older, traditional Main Liners;
- >Younger (& older) Fashion-Forward Main Liners

These groups reflect the longstanding stores on Lancaster Avenue and the new stores that are locating there. To a lesser extent the other groups are “Culture–Oriented” and “Children with their Parent’s Resources.”

Communities are complex mixes of multiple identity groups. We know that there are other groups in Bryn Mawr but they haven’t been identified and haven’t participated in the workshops.

**Process: Bryn Mawr’s Strengths/Weakness/Threats/Opportunities**

Looking at the Strengths/Weakness/Threats/Opportunities identified by the workshop, it was clear that the retail business owners had a different view than the real estate businesses. Their responses have been separated in the charts. Again, like the Civic Association, more weaknesses were noted than strengths.

**Business Owners Issues: Perceived Strengths**

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*Prestigious Name -- Business: 45%; Real Estate: 29%*

- Name recognition
- Reputation
- Bryn Mawr’s history & Lancaster Avenue
- History
- Stability
- Prestigious name
- Strong traditional identity

*Location – Business: 36%; Real Estate: 57%*

- Location:
- Location
- Great location
- Centrally located
- Resources/mix of services/housing
- Proximity to excellent neighborhoods/schools

*High income – Business: 36%; Real Estate: 29%*

- The money power of local residents
- Broad range of customers
- Social economic status of residents
- High end specialty shops
- Income of residents
- Solid demographics

**Business Owners Issues: Perceived Weaknesses**

---

*Parking -- Business: 55%; Real Estate: 57%*

- Parking
- Parking
- Parking
- Parking
- Parking, parking
- Parking meters & Meter Maids
- Inconvenient parking



Parking is a challenge  
Parking  
Parking

*Lancaster Avenue -- Business: 45%; Real Estate: 29%*

Lancaster Avenue  
4 lane highway running through  
High traffic speed on Route 30  
Bridge out at Merion Avenue  
Safety of pedestrians  
Overly linear town center up & down Lancaster Avenue  
No sense of place. Lancaster Avenue ruins the ambience/atmosphere  
Narrowness of Lancaster Avenue

*Attitude -- Business: 45%; Real Estate: 43%*

The ability to make the change from conservative to fashion  
No vibrant image  
Rundown  
Lack of creativity of shop owners  
Lack of progressive attitude  
Lack of planning--- current codes encourage suburban sprawl  
Currently no organization

*Vacancies, Low Foot Traffic -- Business: 45%*

Low pedestrian traffic  
Lack of open businesses  
Stores closing early  
Signage

*Property Owners-- Real Estate: 29%*

Too many property owners  
Property owners expect too much rental income

*Verizon Building/BMHs-- Real Estate: 29%*

Verizon Building  
Overwhelming presence of Bryn Mawr Hospital

### **Business Owners Issues: Perceived Threats**

---

*Conservative Attitude-- Business: 36%; Real Estate: 57%*

Too conservative  
Old-fashioned + unfriendly  
People who don't want change  
Doing nothing  
Complacency with the status quo and resistance to change

*Parking-- Business: 33%; Real Estate: 57%*

Loss of business due to parking  
Traffic

Traffic  
Lack of parking  
Inability to make left turns from Lancaster Avenue  
Traffic on Lancaster Avenue  
Mall shoppers having ample parking & safety  
Lack of real crossroads/4 corners

*NIMBYs-- Real Estate: 29%*

Bryn Mawr Hospital  
Civic Association  
NIMBY-ism

*Zoning-- Business: 18%; Real Estate: 29%*

Loss of business due to zoning  
Zoning  
Lack of unity within town  
Very difficult / expensive to develop land: cost/time prohibitive  
Continued decline...

*Retail Mix-- Business: 18%*

Other neighboring towns  
Not attracting correct retail mix  
Stores closing  
Degradation of retail to cosmetics: nails

**Business Owners Issues: Perceived Opportunities**

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*New Development—Business: 55%; Real Estate: 71%*

Rejuvenation  
Planned commercial development  
Development  
Development  
To build a retail strip  
Culture & restaurants  
Increased focus of township  
Better growth & tax base  
Bring community together for good of all business in the area  
Tremendous growth  
Central to Main Line  
A market for high-end luxury condominiums for empty nesters  
Lot 7  
Verizon lot  
Develop parking lot with retail and residential. Verizon lot.  
Establish Bryn Mawr Avenue from RR to hospital as new retail (a la North Avenue in Wayne)  
Ability to update itself as opposed to starting over  
With a facelift, infrastructure improvement and creation of destination, Bryn Mawr can be great.

*Institutions—Business: 33%*

- Hospital growth
- Film Institute
- College
- Great old buildings

**Process: Bryn Mawr's Detractions/Solutions**

All businesses operate within a peer group that they compete with for customers and who represent potential sale losses. The environment of a store's location can contribute to or detract from a store's competitive edge. Responses to these questions identified two main categories that detract from a healthy retail environment:

- > "Parking, traffic, streetscapes"
- > "Dead town, rundown image, poor retail mix, no foot traffic, lack of top national brands, inconvenient to visit"

Business owners made suggestions about how the problems could be solved:

- > "Solve parking, traffic, streetscapes"
- > "Attract high-end, creative, upscale retail & restaurants. Attract hotel, new commercial mix. Promote higher density, better zoning, apartments above stores, retail perpendicular to Lancaster"

**How Bryn Mawr detracts**

---

*Parking, Traffic, Streetscapes—Business: 18%; Real Estate: 29%*

- Parking deficiency
- Parking problems
- Pedestrian safety
- Perception that Bryn Mawr can be a very inconvenient place to shop. Hard to do an easy "in & out"

**What Bryn Mawr can do**

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*Solve the Parking, Traffic, Streetscape Problems-- Business: 36%; Real Estate: 100%*

- Parking
- Longer timed meters
- Free parking days
- Create traffic calming techniques along Lancaster Avenue
- Create many small parking lots spread throughout town
- Slow traffic flow
- Increase municipal parking in central location
- Improve streetscapes
- Pedestrian friendly
- Sidewalk improvements
- Primary: increase store traffic
- Accessible but tasteful parking
- Green space

## How Bryn Mawr detracts

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*Dead town, Rundown Image – Business: 64%; Real Estate: 43%*

The town is dead. A nicer way of putting that is a lack of foot traffic.  
Need to be modernized, rejuvenated & visually enhanced  
Closed stores after 6 pm  
Empty stores  
Ugly signage  
Not enough other creativity  
Bryn Mawr doesn't look like a top 100 Household income zip code  
Lack of really top flight/national retails

## What Bryn Mawr can do

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*Focused Development—Business: 73%; Real Estate: 86%*

Create an overlay district for the main downtown area  
Create BID  
Promote higher density projects with larger residential components  
Hotel  
Facelift to retail corridor  
One solid block of retail perpendicular to Lancaster Avenue  
Encourage apartments above Lancaster Avenue storefronts  
No side yard setbacks, eliminate curb cuts, push storefronts up to sidewalk, move parking to rear  
Enhance visually  
New commercial (planned) development that is interesting, tasteful & draws residents, buyers  
More creative shops & restaurants  
More high-end neighbors  
Retail Mix that attracts new & different customers  
I think of the main drag in Georgetown as a good example of what Bryn Mawr could be: great store, hotels....very vibrant  
More upscale women's stores & services  
More restaurants & culture (like BMFI)  
Hotel & mixed use on Lot 7  
Redo Bryn Mawr Avenue south of Lancaster  
Zoning needs to work with tenants to keep the old properties special—not turn them into boring vanilla boxes

## What we learned:

*Residents and Business Owners both want:*

1. A better walking environment on Lancaster Avenue;
2. Calmed traffic on Lancaster Avenue;
3. Improved and more retail & restaurants to augment the existing specialty shops and cultural destinations.

*Business Workshop participants fear:*

Lack of action on key issues---poor retail mix, difficult parking & low foot traffic---will destroy their market.

*Some Civic Association Workshop participants fear:*

The potential of development to change their lifestyle.

**What we understand:**

*Make Bryn Mawr a destination that is:*

- >pleasurable and inviting to walk around;
- >convenient to drive into and to park.

*Make Bryn Mawr a destination that holds enough stores, restaurants, cultural outlets, etc. within that:*

- >it is worth the time to take the train or drive to spend time in Bryn Mawr.

*Make arrival in Bryn Mawr obvious so that:*

- >visitors are comfortable enough to park the car and walk around.

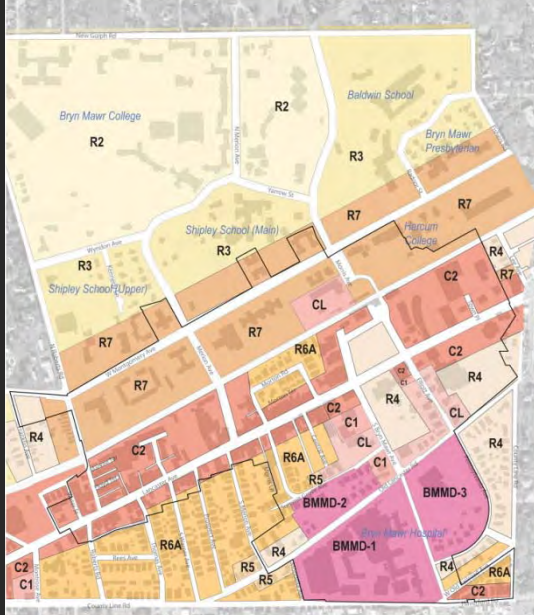
**TRID offers economic tools to:**

1. Improve infrastructure: streetscapes, traffic, signage;
2. Focus development in central train station location;
3. Increase and improve retail mix;
4. Provide convenient & ample parking;
5. Negotiate with PennDOT on Lancaster Avenue issues.

Bryn Mawr Master Plan / TRID

# ZONING WORKSHOP

26 April 2007



# SCHEDULE

- January 2007 Ad Hoc Committee: Introduction of TRID
- February Ad Hoc Committee: Boundary Rationale
- March Ad Hoc Committee: Zoning Concept
- April Workshops with Civic Association and Business Owners
- April 26 Ad Hoc Committee: Zoning Workshop
- May 17 Ad Hoc Committee: Value Capture
- May 21 Civic Association: Workshop results and TRID
- May 22 Business Association: Workshop results and TRID
- June Ad Hoc Committee: Zoning workshop update
- June Public Meeting: TRID and Zoning
- Fall 2007 Board of Commissioners/Public Meeting: TRID

# IMPLEMENTATION

Why are we here

- Lack of critical mass and mix of retail
- Vacant lots
- Lack of investment in existing commercial buildings
- Strip development character in places
- Challenging real estate economics
- Uneven streetscape character
- Poor distribution and duration of parking
- Traffic speed, congestion, and pedestrian conflicts



# IMPLEMENTATION

## Master Plan Implementation

- Restaurant zoning adjustments
- Retail strategy
- Retail coordinator
  
- Traffic improvement (traffic study)
- Public improvements (TRID funding strategy)
- Retail management (BID proposal)
- Infill development (zoning concept)
- Ludington Library expansion proposal

# IMPLEMENTATION

## TRID

- State enabling legislation to be applied locally
- Funds planning studies to prioritize actions
- Leads to custom-defined local ordinance
- Mechanism for funding public improvements
- Mechanism for potential state funding
- Offers potential for management structure
- Encourage partnerships: public, private, transit

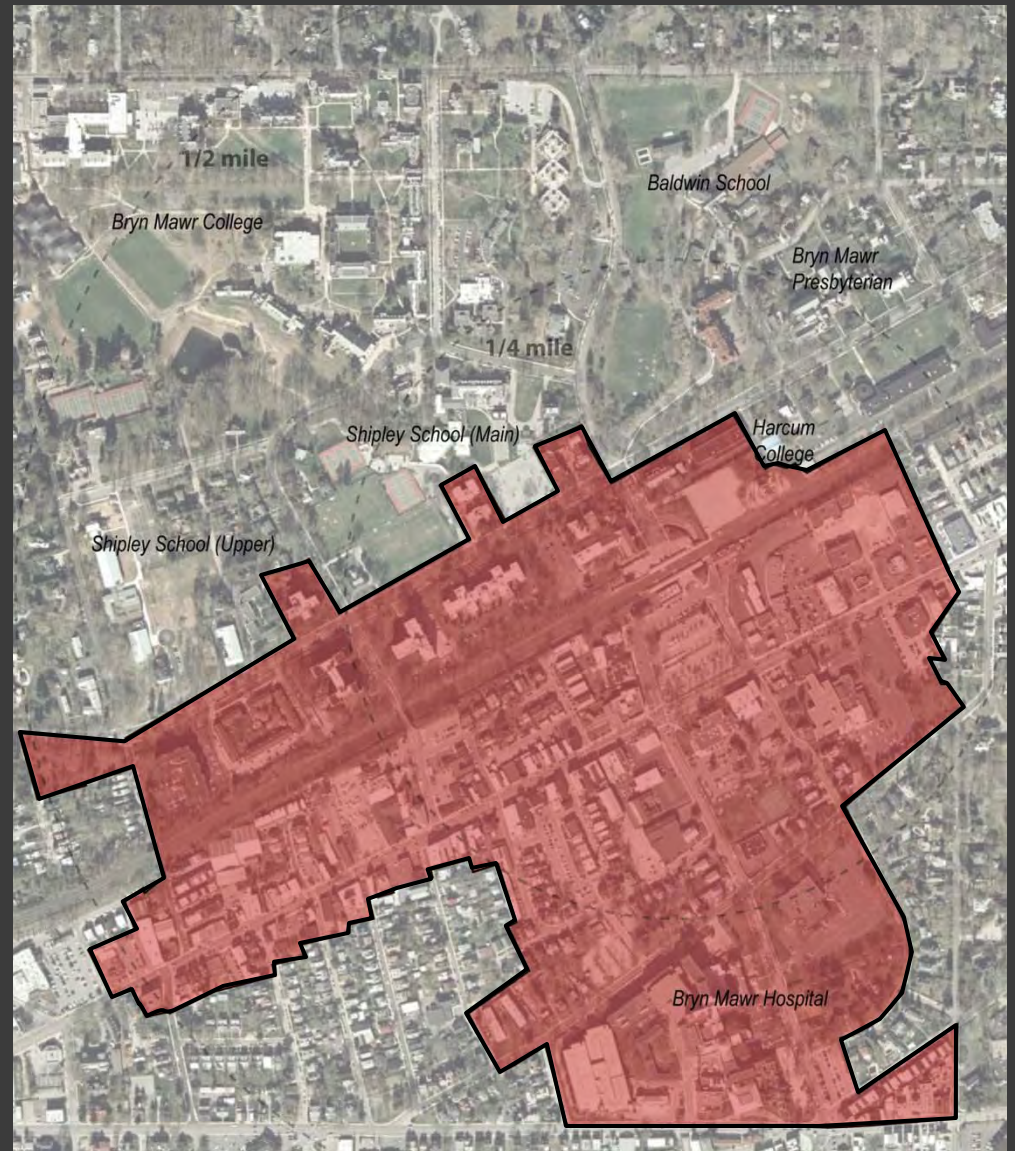
## TRID customized for Bryn Mawr is NOT

- Township or Transit property acquisition
- Demolition of historic village character
- Increased taxes
- Subsidy of private development

# IMPLEMENTATION

## Preliminary TRID Boundary Rationale

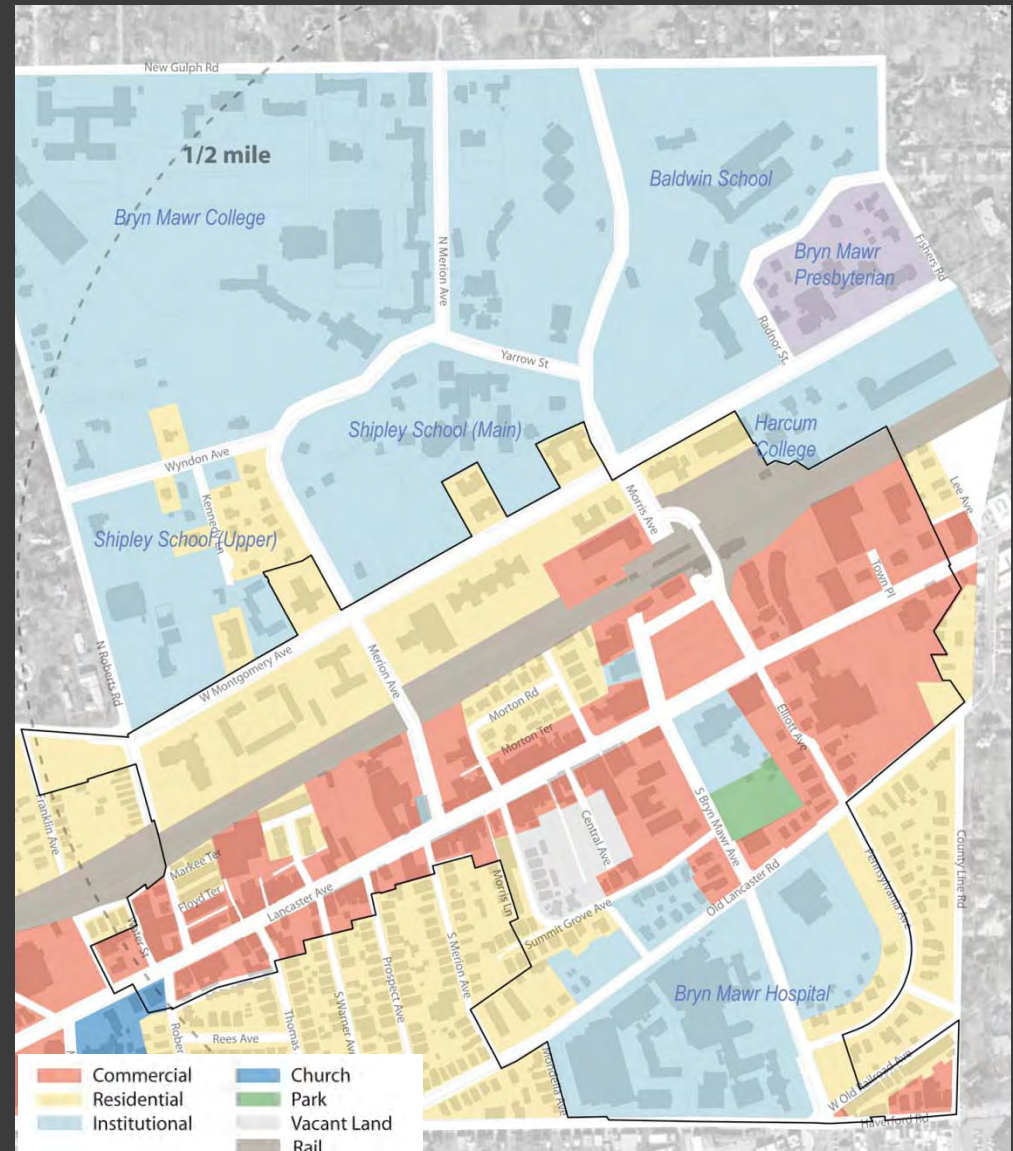
- Opportunities for
  - Private infill development
  - Renovation and reinvestment
  - Station improvements
  - Pedestrian and street improvements
- Coherent investment district



# IMPLEMENTATION

## Existing land uses

- Commercial district
- Surrounding residential
- Major institutions and churches
- Focused parks



# IMPLEMENTATION

Master Plan  
recommendations for  
development sites

- Reinvestment/renovation areas
- Infill sites short and long term



# IMPLEMENTATION

Master Plan  
recommendations for  
development sites

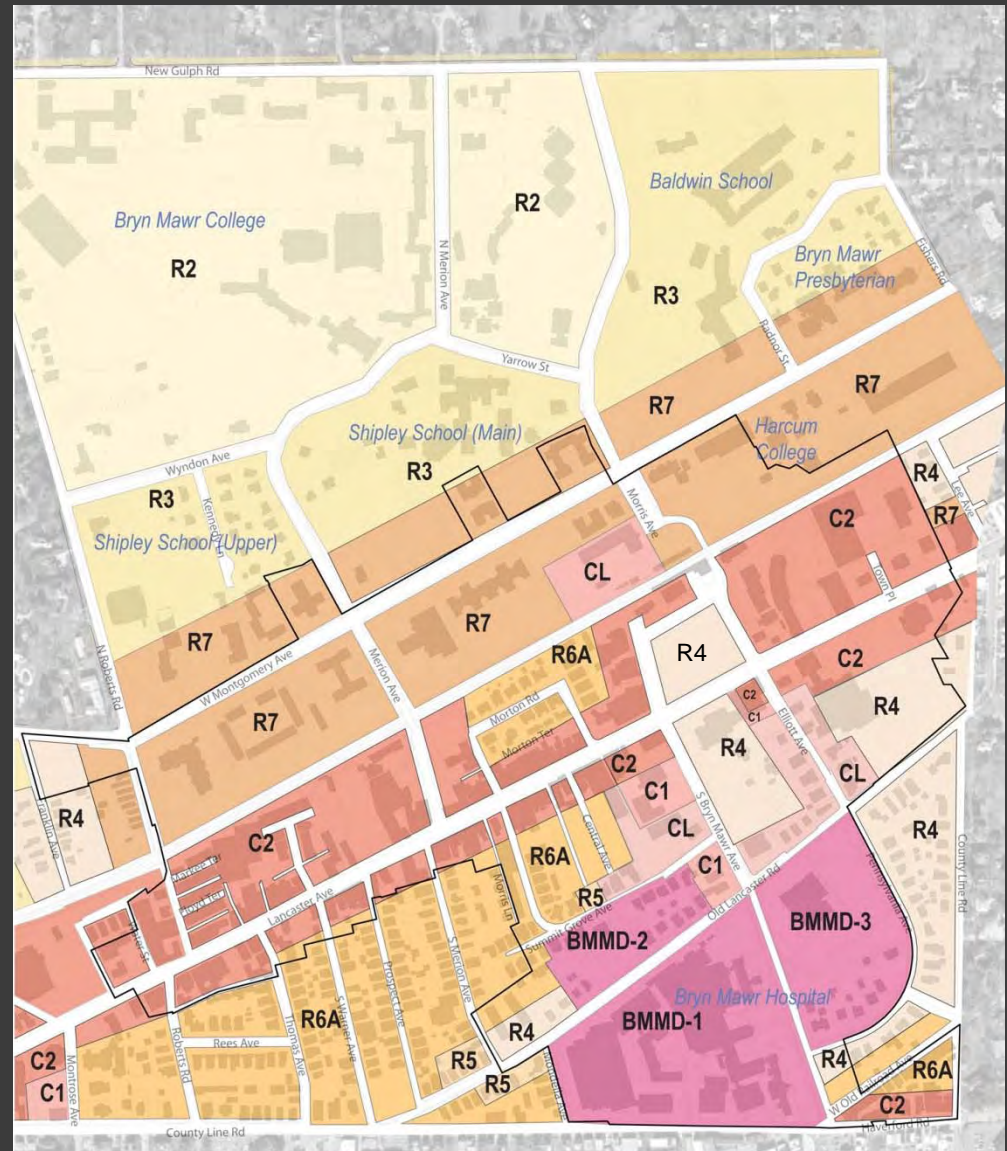
- Reinvestment/renovation areas
- Infill sites short and long term



# IMPLEMENTATION

## Existing zoning

- Fragmented zones
- Patchwork of coverages and setbacks
- Encourages strip development
- Allows six stories, but unachievable
- Regulations set barriers to development and quality village design



# IMPLEMENTATION



ERA

SASAKI

CIVICVISIONS



# IMPLEMENTATION



ERA

SASAKI

CIVICVISIONS

# ZONING CONCEPTS

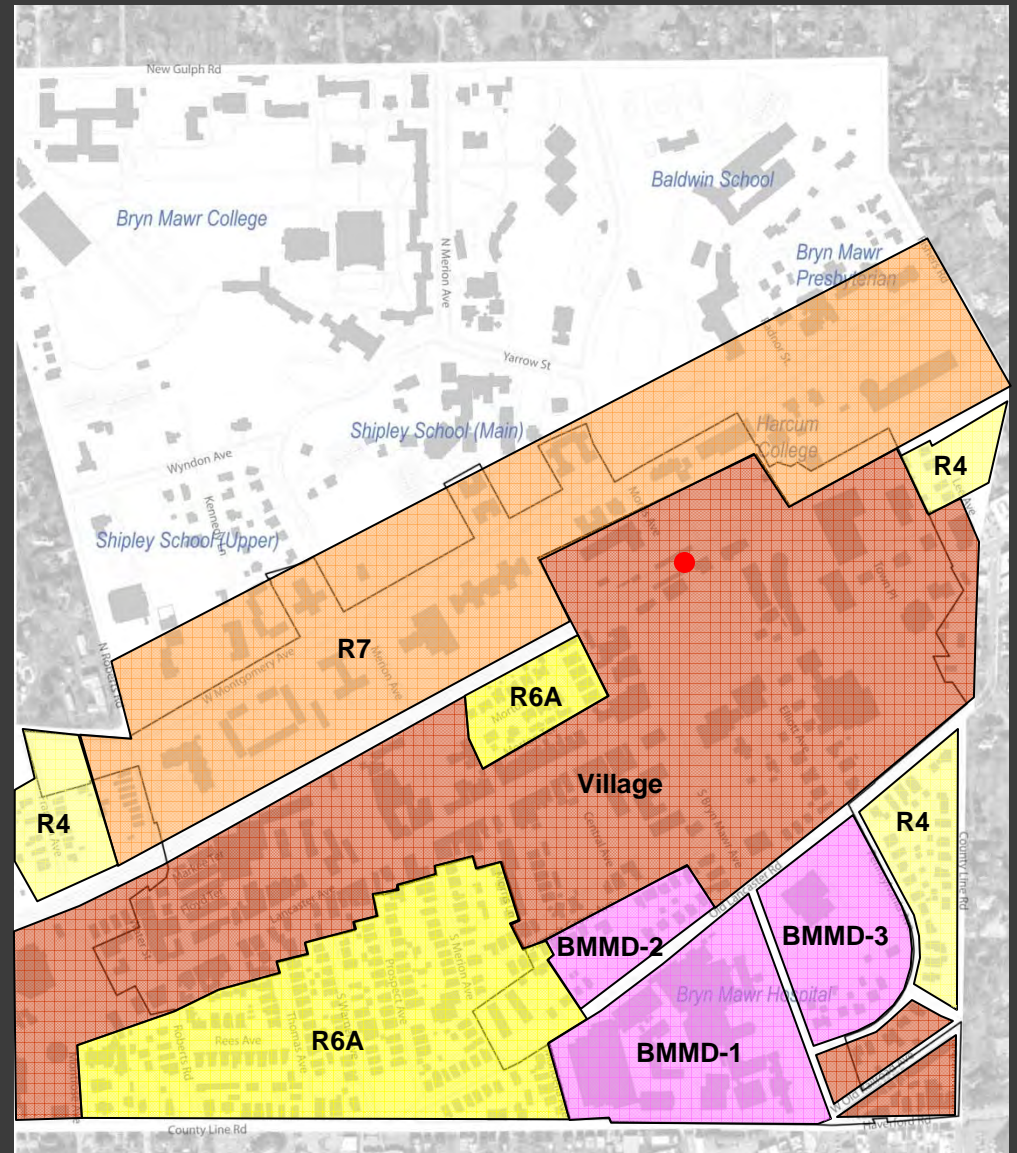
Bryn Mawr Zoning Goals:

1. Focus on desirable outcomes
2. Clarity of code
3. Streamlined review process
4. Respond to development realities



# ZONING CONCEPTS

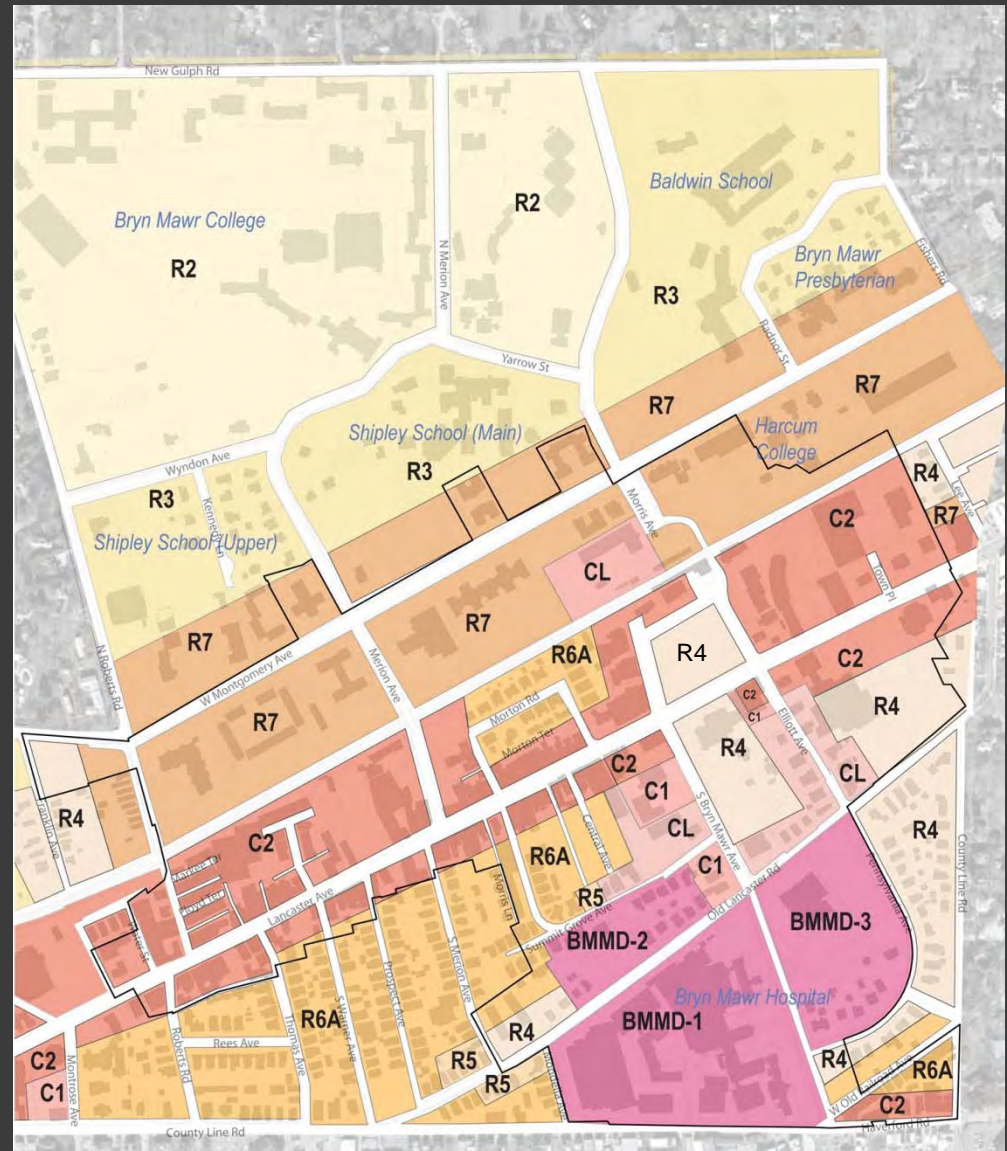
- Create a coherent village district on underlying commercial zones with form-based zoning
- Allow for village development around Five Points
- Retain medical zones
- Retain residential neighborhoods
- Institutional shared parking



# IMPLEMENTATION

## Existing zoning

- Fragmented zones
- Patchwork of coverages and setbacks
- Encourages strip development
- Allows six stories, but unachievable
- Regulations set barriers to development and quality Village design



# IMPLEMENTATION

Master Plan  
recommendations for  
development sites

- Reinvestment/renovation areas
- Infill sites short and long term



ERA

SASAKI

CIVICVISIONS

# ZONING CONCEPTS

## Village District

- Mix of uses: retail, restaurant, office, residential, cultural, civic
- First floor retail on Lancaster and Bryn Mawr Avenues
- Consistent street wall: minimum of two to three stories
- Step-backs at upper levels



# ZONING CONCEPTS

- Build-to-lines at the street right-of-way
- Zero lot side yards
- Street level front doors and retail transparency
- Articulation of building facades and roof lines
- Impervious cover of 85 to 100 percent
- Buffer areas to adjacent residential





# ZONING CONCEPTS

Density incentives for achieving civic goals

- Workforce housing or funding
- Public parking
- Public gathering space



# ZONING CONCEPTS

- Structured parking wrapped with retail or residential
- Shared parking
- No additional curb-cuts or drive-through uses



## Reduced Parking Requirements

- Residential 1.5/unit
- Hotel 1/room
- Retail/restaurant 3.5/1000 sf
- Office 3.0/1000 sf

# ZONING CONCEPTS

## Streamlined Review/Implementation

- Avoid conflicting requirements
- Reflect conditions on the ground in Bryn Mawr (parcel size, etc.)
- Reflect market realities
- Flexibility for changing future

# ZONING CONCEPTS

## Fears:

- Development will happen all at once
- Large projects
- Historic character
- Change
- Gentrification
- Hospital expansion
- Structured parking

# ZONING CONCEPTS

## Fears:

- Development will happen all at once
- Large projects
- Loss of historic character
- Change
- Gentrification
- Hospital expansion
- Structured parking

## Likely:

- Phased over time
- Many small owners
- Incentives to invest
- Places evolve over time
- Diversity of housing choices
- Defined outcomes
- Efficient use of land / transit oriented development

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, April 26, 2007 at 5:30 PM**

**Meeting Notes**

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Commissioner Philip Rosenzweig  
Susan Arizini  
Charles Bloom  
Vincent DiCioccio  
Mike Fanning  
Nancy Vickers  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

**Guests:**

Kathryn Madden, Sasaki Associates  
Susan Snyder & George Thomas, CivicVisions  
Sue Gibbons, Gannett Fleming  
Brian O'Leary, Montgomery County Planning Commission  
Dave Fogel, Septa  
Rich Bickel, Delaware Valley Regional Planning Commission  
Richard Wells, Main Line Health

**Staff in Attendance:**

Angela Murray  
Pat Ryan  
Bob Duncan  
Eric Persson

1. Report from the Chairman

Chairman Scott Zelov welcomed those in attendance to the special workshop on new zoning options for Bryn Mawr. The focus of the meeting is to discuss and understand how zoning changes will flow from the Master Plan and enable planned changes. Scott noted that this is a continuation of the time spent at the March meeting discussing zoning with consultant Kathryn Madden from Sasaki Associates. At that time, we agreed to hold a three hour team and committee workshop led by Kathryn specifically to review proposed zoning concepts.

In the interim, work has continued for TRID planning with two small group workshops being held earlier in the month. CivicVisions led a visioning workshop with the Bryn Mawr Civic

Association and local residents to gather information from them on how they use Bryn Mawr's amenities and how they think others view and use the Bryn Mawr neighborhood. A similar workshop was held with the Bryn Mawr Business Association and other property owners and tenants to gain understanding about how best to improve the business district.

Information on the findings of these workshop meetings as well as the Transit Revitalization Investment District (TRID) will be presented to the Bryn Mawr Civic Association at their May 21<sup>st</sup> meeting and to the Bryn Mawr Civic Association at their May 22<sup>nd</sup> meeting. Information regarding the value capture provisions will be presented by Mac Nichols from Economics Research Associates at the Ad Hoc Committee meeting on Thursday May 17<sup>th</sup>.

## 2. Presentation by Susan Snyder of Civic Visions

Susan presented the finding from the above noted visioning workshops. These workshops were held to fulfill part of the community outreach required by the TRID legislation as well as ongoing information gathering from the community as to how best to develop both TRID and zoning recommendations. Mapping that took place at the civic level enabled the interpretation of spatial relationships and connections between the residential and business district as well as regionally. The workshops also allow for interaction among groups of residents that may have different views.

There were a number of questions relating to the operation of TRID which were answered in part by Rich Bickel who drafted the legislation that was ultimately passed by the state legislature. It is a mechanism similar to a Tax Increment Financing mechanism that allows for the financing of public improvements with dedicated funds. Since the projects envisioned in the Bryn Mawr Master Plan have no dedicated source of funding other than the Township Capital Improvement Program, this mechanism would allow for incremental tax revenues generated from Bryn Mawr to be utilized within the district only.

## 3. Presentation by Kathryn Madden of Sasaki Associates

Kathryn walked the committee members through a power point presentation utilizing maps of the major redevelopment sites such as Lot 7 and the Verizon lot and discussed how zoning concepts can enable redevelopment in the form and scale acceptable to the community. Kathryn explained that a village district would allow for various scales and densities depending on the location. Another example was the Carpet Diem site and liquor store where the blank walls and lack of building character do not contribute to the pedestrian scale of the business district. While zoning would not encourage redevelopment per se, should it be redeveloped in the future, it would be preferable to continue the cohesive character of the area.

The challenge of writing zoning is to try to anticipate what could happen and what we want to happen. Since form and density are related, this matter is typically addressed through FAR or floor to area ratio. Typically, FAR is not generally utilized in Lower Merion Township, but has more recently been included in overlay ordinances. Bob Duncan noted that Lot 7 could never be developed today under existing zoning due to boundary tolerance requirements that would limit any density on the site.

A question regarding spot zoning was posed. Commissioner Phil Rosenzweig explained that this occurs when one or a few properties benefit from a zoning change that other properties that are similarly situated do not enjoy. It has nothing to do with the size of the property in question. Phil also noted that there is inherent risk in seeking to preserve stringently. The result could be

extended paralysis as exemplified in Ardmore where the land owners have reached a stalemate. In Bryn Mawr we have the opportunity to preserve as well as to allow for appropriate development through the zoning process. We cannot zone incrementally because nothing will happen other than deterioration. Hank Wilson questioned whether the infrastructure can support the planned build-out. Gannett Fleming, represented at the meeting by Sue Gibbons, will be completing the traffic analysis that will analyze build-out and recommended traffic improvements suggested in the Master Plan.

Vince DiCioccio questioned whether it was a presumption rather than a goal to prefer retail uses to services such as banks, insurance companies, etc. Mac Nichols cautioned that restricting certain uses may lead to unintended consequences such as a reduction in retail quality. The goal should be to encourage those uses preferred without being too limiting.

The question of density is ultimately the most important. What is the appropriate number of units per acre for Bryn Mawr? If this is of concern, then using either FAR or limiting the upper number of units per acre would be an approach to take. FAR is the most pure form of measuring density on a lot, but we would also have to consider set-backs above certain heights if we want to maintain conformity with the street wall.

A question was raised about future zoning for the residential area around Central Avenue. How this develops will be largely driven by the hospitals needs as well as the parking needed to support development and business expansion.

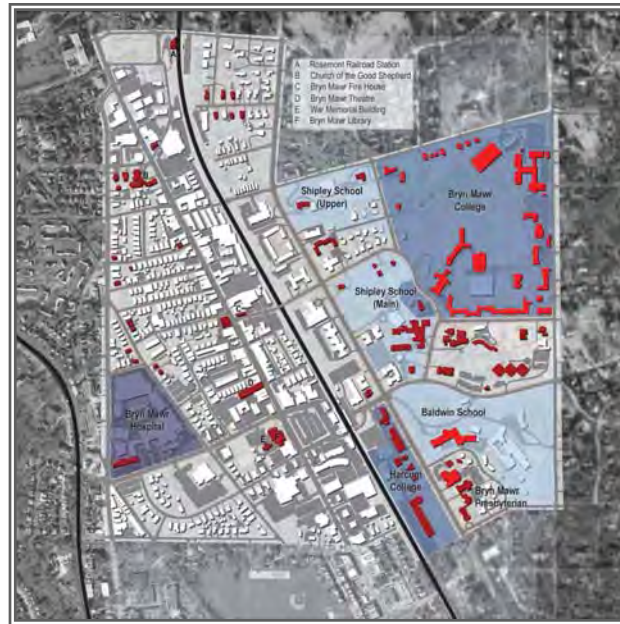
It was agreed that everyone would finish filling out the informational hand-outs that were distributed by Kathryn and return them with comments to Angela Murray as soon as possible. The May 17<sup>th</sup> meeting of the Ad Hoc Bryn Mawr Committee will be focused on information regarding the value capture and further discussion of the operation of TRID. The June meeting will wrap up further discussion of zoning will coincide with a public presentation that evening. That meeting will take place on the second Thursday, June 14<sup>th</sup> in order to accommodate travel schedules.

The next meeting of the Ad Hoc Bryn Mawr Committee will take place on Thursday May 17 at 5:30 PM in the Caucus Room of the Township Administration Building.



# Bryn Mawr TRID Value Capture Analysis

An analysis of real estate assessment value potentially available to be captured for TRID project funding



ERA

CivicVisions

S A S A K I

May 17, 2007

## Agenda

### I. Introduction to TRID Value Capture

### II. Approach & Methodology

### III. Value Capture Estimates

#### I. Bryn Mawr Hospital & Lot 7 Development Program

#### II. Value Capture Summary & Analysis

##### I. Estimated Revenues

##### II. Sensitivity Analysis

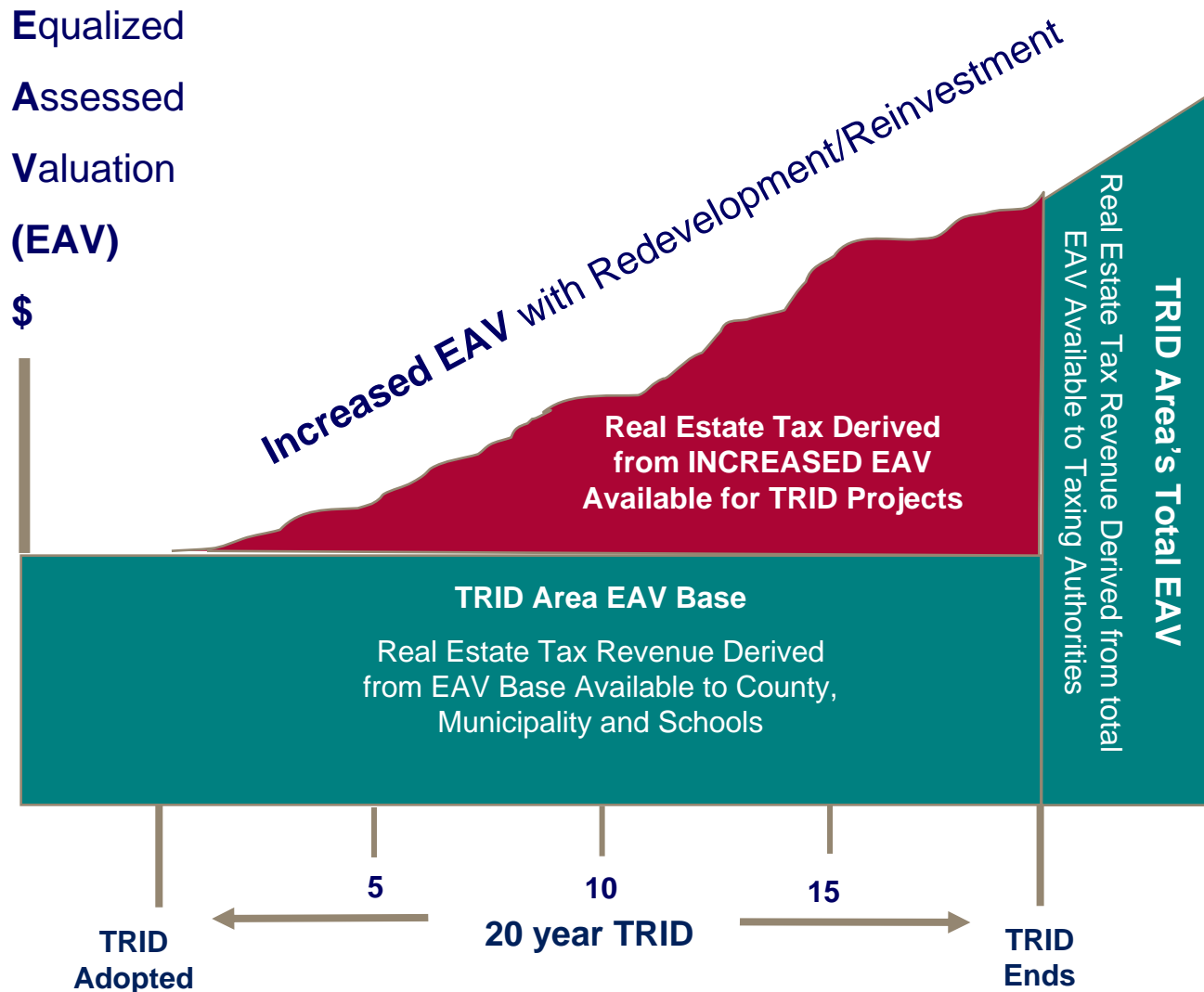
### IV. Considerations, Decision Options & Next Steps

## Transit Revitalization Investment District (TRID)

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- Planning and funding tool to support revitalization, redevelopment, and development adjacent to transit
  - State funds for planning
  - Potential for state funding for projects, etc. (authorized, but not appropriated)
- Encourages cooperative agreements and relationships among and between taxing authorities (County, Township, and Schools) and transit entities (Amtrak and SEPTA).
- Primary funding mechanism uses “value capture” to target revenue and expenditures in designated area for 20 years
  - Funding mechanism functions similar to Tax Increment Finance (TIF) using “value capture”
  - *Does not raise tax rates or increase taxes to property owners*

# What Do We Mean By "Value Capture"?



# Assumptions

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## Financial Assumptions

- ▶ Lot 7 is assumed to be developed according to preferred program included in Bryn Mawr master plan with zoning and density sufficient to execute the development program.
- ▶ Annual value increase of total TRID area properties assumed to be 3% (for inflation).
- ▶ No additional improvements assumed.
- ▶ Revenue projections for total TRID boundary area do not include Montgomery Avenue properties.

## Fiscal Assumptions

- ▶ Total Current Millage Rate: 24.452
  - County Rate: 2.84
  - LMT Rate: 3.54
  - Schools Rate: 18.878
- ▶ “All-in” combined rate is assumed to include:
  - 80% of Township Millage
  - 80% of County Millage
  - 25% of School Millage
- ▶ Alternative: 80% Township; 80% County
- ▶ Township and County Millage Rate increased at 3% per year
- ▶ School Millage Rate increased annually at 5%

# Value Capture Analysis

## Current Assessed Values

Total Preliminary TRID Area (including Montgomery Avenue & BMH & Lot 7 Planned Developments)	\$ 149,381,880
Total Preliminary TRID Area (excluding Montgomery Avenue & Planned Developments)	\$ 130,280,790
Bryn Mawr Hospital Development Program Properties	\$ 7,902,190
Lot 7 (Exempt)	\$ -
<b>TOTAL (initial TRID boundary)</b>	<b>\$ 157,284,070</b>
<b>TOTAL (TRID w/o Montgomery Ave)</b>	<b>\$ 138,182,980</b>

## Estimated Value of Improvements – BMH & Lot 7

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Improvement	Estimated Assessed Value
▶ <b>BMH Old Lancaster MOB</b>	<b>\$16,953,507</b>
▶ <b>BMH Old Lancaster Parking Lot</b>	<b>\$ 252,826</b>
▶ <b>BMH Founders MOB</b>	<b>\$ 12,686,298</b>
▶ <b>BMH Founders Parking Garage</b>	<b>\$ 8,381,321</b>
▶ <b>BMH Townhouses</b>	<b>\$ 16,392,273</b>
▶ <b>Lot 7 Residential</b>	<b>\$ 14,753,046</b>
▶ <b>Lot 7 Retail</b>	<b>\$ 4,250,880</b>
▶ <b>Lot 7 Garage</b>	<b>\$ 2,225,023</b>

# Value Capture Summary

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LMT+County+Schools (80%/25%)
▶ 20 – Year Tax Revenues with BMH & Lot 7 Developments
▶ 20 – Year Cumulative Tax Revenues Available in TRID
▶ NPV @4.5% Discount Rate

Tax Revenues
\$ 50,515,388
\$ 24,685,998
\$13,918,000

LMT+County (80%)
▶ 20 – Year Tax Revenues with BMH & Lot 7 Developments
▶ 20 – Year Cumulative Tax Revenues Available in TRID
▶ NPV @4.5% Discount Rate

Tax Revenues
\$ 24,426,046
\$ 11,005,859
\$6,312,000



**Tax Revenue Projections**  
**Potential TRID Revenue Timeline-Combined**

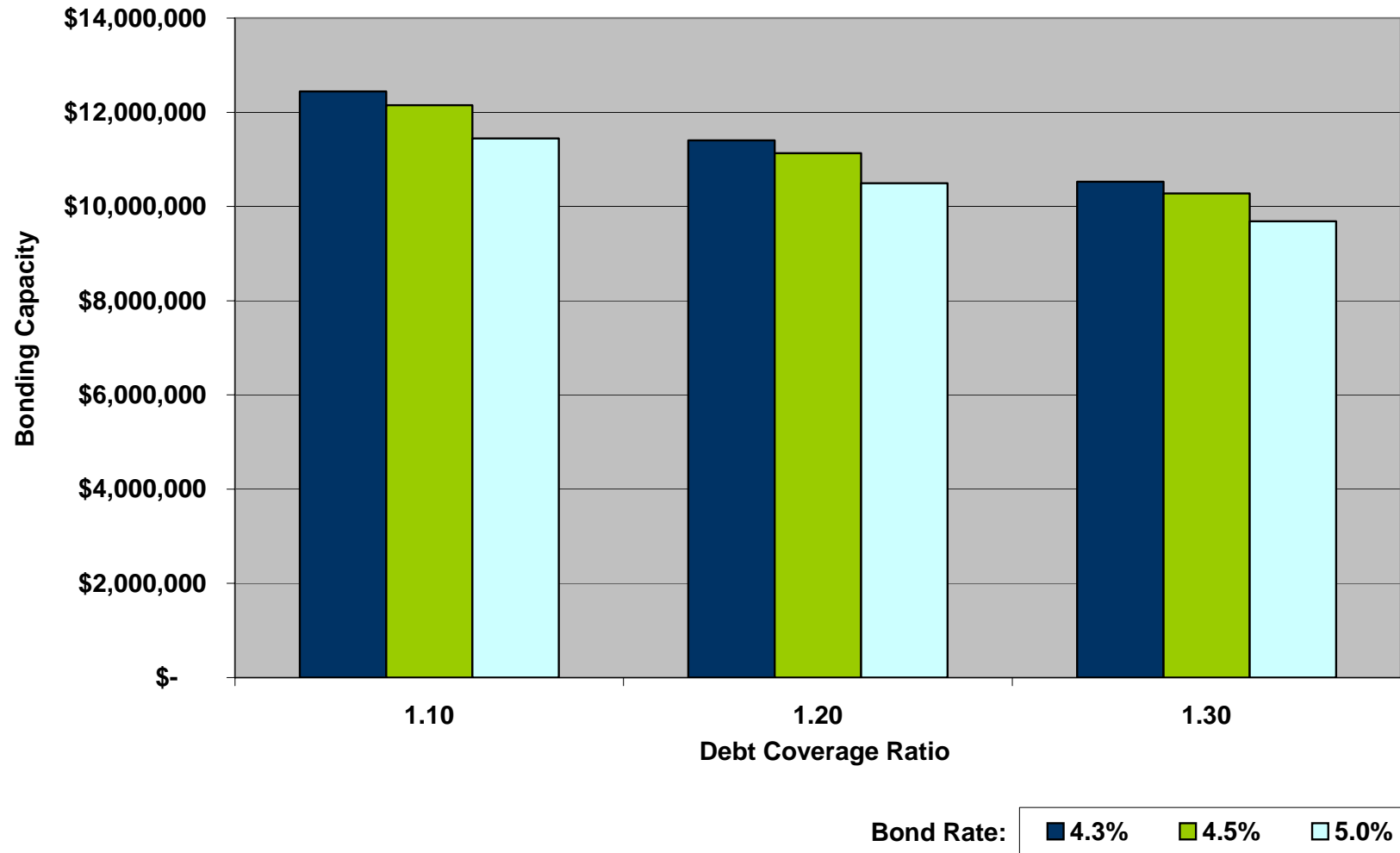
<b>Combined Millage Rate<sup>1</sup></b>	<b>9.824</b>		<b>10.184</b>		<b>10.557</b>		<b>10.944</b>		<b>11.345</b>		<b>11.761</b>	
<b>Lot 7</b>	<b>2008</b>		<b>2009</b>		<b>2010</b>		<b>2011</b>		<b>2012</b>		<b>2013</b>	
<b>Retail</b>												
Ground Floor Retail	\$	-	\$	-	\$	-	\$	-	\$	9,645	\$	39,996
<b>Parking</b>												
Structure	\$	-	\$	-	\$	-	\$	4,870	\$	20,195	\$	26,169
<b>Residential</b>												
Luxury Multi-family	\$	-	\$	-	\$	-	\$	32,291	\$	133,901	\$	173,512
<b>BMH</b>												
<b>Parking</b>												
Structure-Phase I	\$	-	\$	63,121	\$	65,435	\$	67,834	\$	70,321	\$	72,899
Structure-Phase II	\$	-	\$	-	\$	-	\$	-	\$	24,767	\$	25,675
Lot	\$	-	\$	2,575	\$	2,669	\$	2,767	\$	2,868	\$	2,974
<b>Office</b>												
Medical Office Building-Old Lancaster	\$	-	\$	172,648	\$	178,978	\$	185,539	\$	192,341	\$	199,392
Medical Office Building-Founders	\$	-	\$	129,193	\$	133,929	\$	138,839	\$	143,928	\$	149,205
<b>Residential</b>												
Townhomes	\$	-	\$	66,773	\$	103,832	\$	179,397	\$	185,973	\$	192,791
Remaining TRID Boundary Area <sup>2</sup>	\$	-	\$	1,148,949	\$	1,191,070	\$	1,234,734	\$	1,279,999	\$	1,326,924
<b>TOTAL REVENUE</b>	\$	-	\$	1,583,259	\$	1,675,911	\$	1,846,271	\$	2,063,939	\$	2,209,536
<b>BASELINE</b>	\$	-	\$	1,359,442								
<b>DIFFERENTIAL</b>	\$	-	\$	223,817	\$	316,470	\$	486,829	\$	704,497	\$	850,094
<b>NPV @ 4.5% DISCOUNT</b>										<b>\$ 13,918,000</b>		
<b>1.2 DEBT COVERAGE ADJUST</b>										<b>\$ 11,598,000</b>		
<b>LESS 4% ISSUANCE FEES</b>										<b>\$ 11,134,000</b>		

<sup>1</sup>Millage rate annual increase=3%; Combined Rate=80% township+80% county+25% school)

<sup>2</sup>Excluding Montgomery Avenue

# Sensitivity Analysis

## Sensitivity Chart 1

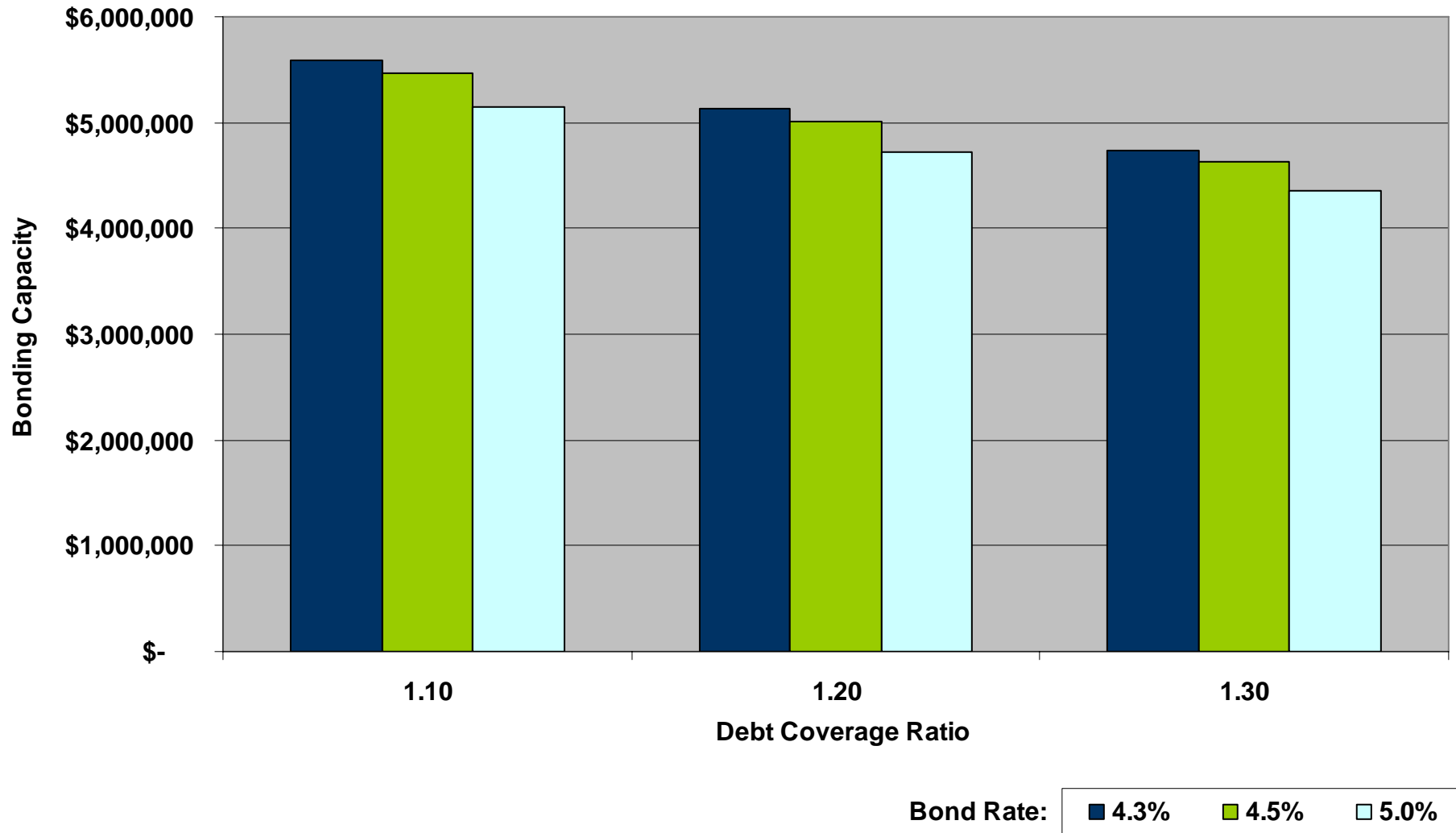


**Revenue Projections**  
**Twnshp/County Potential TRID Revenue Timeline**

<b>Township/County Tax Millage Rate<sup>1</sup></b>	<b>5.104</b>	<b>5.257</b>	<b>5.415</b>	<b>5.577</b>	<b>5.745</b>	<b>5.917</b>	<b>6.094</b>	<b>6.277</b>
<b>Lot 7</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>
<b>Retail</b>								
Ground Floor Retail	\$ -	\$ -	\$ -	\$ -	\$ 4,884	\$ 20,122	\$ 25,907	\$ 26,684
<b>Parking</b>								
Structure	\$ -	\$ -	\$ -	\$ 2,482	\$ 10,225	\$ 13,165	\$ 13,560	\$ 13,967
<b>Residential</b>								
Luxury Multi-family	\$ -	\$ -	\$ -	\$ 16,456	\$ 67,800	\$ 87,293	\$ 89,912	\$ 92,609
<b>BMH</b>								
<b>Parking</b>								
Structure-Phase I	\$ -	\$ 32,585	\$ 33,563	\$ 34,570	\$ 35,607	\$ 36,675	\$ 37,775	\$ 38,908
Structure-Phase II	\$ -	\$ -	\$ -	\$ -	\$ 12,541	\$ 12,917	\$ 13,304	\$ 13,704
Lot	\$ -	\$ 1,329	\$ 1,369	\$ 1,410	\$ 1,452	\$ 1,496	\$ 1,541	\$ 1,587
<b>Office</b>								
Medical Office Building-Old Lancaster	\$ -	\$ 89,127	\$ 91,800	\$ 94,554	\$ 97,391	\$ 100,313	\$ 103,322	\$ 106,422
Medical Office Building-Founders	\$ -	\$ 66,693	\$ 68,694	\$ 70,755	\$ 72,878	\$ 75,064	\$ 77,316	\$ 79,635
<b>Residential</b>								
Townhomes	\$ -	\$ 34,470	\$ 53,257	\$ 91,424	\$ 94,167	\$ 96,992	\$ 99,902	\$ 102,899
Remaining TRID Boundary Area2	\$ -	\$ 593,125	\$ 610,919	\$ 629,246	\$ 648,123	\$ 667,567	\$ 687,594	\$ 708,222
<b>TOTAL REVENUE</b>	<b>\$ -</b>	<b>\$ 817,329</b>	<b>\$ 859,602</b>	<b>\$ 940,898</b>	<b>\$ 1,045,069</b>	<b>\$ 1,111,604</b>	<b>\$ 1,150,133</b>	<b>\$ 1,184,637</b>
<b>BASELINE</b>	<b>\$ 706,326</b>							
<b>DIFFERENTIAL</b>	<b>\$ -</b>	<b>\$ 111,004</b>	<b>\$ 153,276</b>	<b>\$ 234,572</b>	<b>\$ 338,743</b>	<b>\$ 405,278</b>	<b>\$ 443,807</b>	<b>\$ 478,311</b>
					<b>NPV @ 4.43% DISCOUNT \$</b>	<b>6,312,000</b>		
					<b>1.3 DEBT COVERAGE ADJUST \$</b>	<b>5,260,000</b>		
					<b>LESS 4% ISSUANCE FEES \$</b>	<b>5,050,000</b>		

<sup>1</sup>80% of total millage available; Annual millage increase=3%  
 Economics Research Associates, 2007.

## LMTCnty Sensitivity Chart 2



## Various Approaches

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### ➤ Bond

- Limited “sure things” upon which to bond. May only be able to use Bryn Mawr Hospital development to underwrite.

### ➤ Invest and “Bank”

- Invest funds annually for specific periods during TRID timeline that will earn interest
- Withdraw and use funds for specific projects, supplemented by other sources.

### ➤ “Pay-as-You-Go”

- Use annual or biennial funds accrued to pay on a project-by-project basis, possibly supplemented by other grants, funds, etc.

### ➤ Phased TRID

- Adjust the timeline available by not establishing a baseline throughout entire TRID area as a way of extending time for development and property improvements to be planned and come online.
- Requires close monitoring of development pipeline and continuous Commission support over extended period.

## TRID Value Capture Analysis

- Because of limited projects currently in the pipeline, the analysis focuses on Bryn Mawr Hospital developments on Old Lancaster and Founders site and Lot 7. Assessed values for Central Avenue area and Verizon lot need to be developed.
- Without adequate zoning density for Lot 7, the development program and revenue will be much less than projected.
- Available revenue will need to cover improvements and administration. With limited funds, administration should probably be handled internally by existing structure with the Township serving as the TRID commission.
- Lot 7 development and revenue will be delayed by need to construct Commuter Parking Structure, zoning change, RFP and selection process. Initial funding will be needed to begin the Commuter Parking Structure. Timely zoning adjustments may encourage as-yet-unidentified development in other areas of the TRID that may help fund the structure or other funds will need to be identified to cover gap in time.
- Agreement with Amtrak/SEPTA should focus on improvements to the station.

# Decision Options

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## ➤ Continue with TRID Planning Process

- Finalize TRID area boundary
- Finalize value capture analysis estimates, including potential for Central Avenue and Verizon lot.
- Identify sources and uses of funds
  - Explore additional state funding
  - Short-term funding for commuter parking structure
  - Estimates for priority projects identified in Bryn Mawr Master Plan
  - Preferred funding approaches
- Prepare initial zoning approach, overlay and timeline for implementation
- Negotiate agreements with Schools, County, Amtrak, and SEPTA
- Prepare draft TRID plan with all sections required by statute
- Submit TRID Plan to Township Commission approval following public hearing
- Commuter Structure development program implementation
- Lot 7 RFP process

## ➤ Implement Master Plan without TRID

- Complete zoning analysis in conjunction with the Bryn Mawr Master Plan
- Identify potential sources of funds for priority projects and timeline.
- Development of commuter parking structure
- Lot 7 RFP process and development

# TOWNSHIP OF LOWER MERION

## Ad Hoc Bryn Mawr Committee

Thursday, May 17, 2007 at 5:30 PM

### Meeting Notes

#### **Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Charles Bloom  
Vincent DiCioccio  
Mike Fanning  
Nancy Vickers  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

#### **Guests:**

Mac Nichols, Economics Research Associates  
Dave Fogel, Septa  
Rich Bickel, Delaware Valley Regional Planning Commission

#### **Staff in Attendance:**

Doug Cleland  
Angela Murray  
Eric Persson

#### 1. Report from the Chairman

Commissioner Scott Zelov announced the Bryn Mawr concert series that will start on June 1<sup>st</sup> at the Gazebo. There will be a tribute to long time Bryn Mawr supporter and former Ad Hoc Committee member John Sabatini. Mike Fanning reported on moving the Bryn Mawr iconic horse from its old temporary home to its new one. It will be renovated and then place in a permanent home in the fall.

Scott recognized Nancy Vickers and Bryn Mawr College in their efforts to find a conservation-minded purchaser for the Glenmeade property. He made note of the cooperation provided by the College in recognizing the importance of this property to the community. Nancy Vickers said that the College is hoping for viable offers in this regard.

#### 2. Bryn Mawr Hospital Update

Commissioner Scott Zelov announced the Bryn Mawr concert series that will start on June 1<sup>st</sup> at the Gazebo. There will be a tribute to long time Bryn Mawr supporter and former Ad Hoc Committee member John Sabatini. Mike Fanning reported on moving the Bryn Mawr iconic horse from its old temporary home to its new one. It will be renovated and then place in a permanent home in the fall.



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Commissioner Zelov reported that the Township Board of Commissioner's had authorized entering into an agreement with Radnor Township for the improvements to the "Five-Points" intersection. The Township will continue to work with Radnor to bring this important project to fruition. Bryn Mawr Hospital held a ground breaking for its new Emergency medical facility on the main hospital grounds.

### 3. Bryn Mawr Business Association Update

Bryn Mawr Business Association President, Vince DiCioccio reported that work has continued on the efforts to create a Business Improvement District (BID) having received estimated assessments for the major properties from Eric Persson of the Township staff. There will be some minor overlap of Haverford Township with Lower Merion Township in order to capture some of the major businesses on Lancaster Avenue. Vince requested the help of all Committee members in persuading the businesses to participate positively in the BID. On June 18<sup>th</sup>, the Business Association will hold a major BID update meeting for all the business and property owners.

### 4. Bryn Mawr TRID Value Capture Presentation – Mac Nichols, Economics Research Associates

Mac Nichols presented a power point review of the work that he and his colleague's have completed on the Value Capture estimates for the TRID district. He reviewed the basic approach and methodology, the use of TRID as a planning and funding tool, opportunities for state funding and cooperative efforts with Septa and Amtrak. Mac discussed TRID as similar to a Tax Increment Financing mechanism where a base line is established for real estate taxes from the date of the establishment of the TRID. There is no increase in taxes as a result of creating the TRID.

The presentation assumed the development program outlined in the Bryn Mawr Master Plan rather than a specific zoning district. However, in order for redevelopment to occur on Lot 7, for example, a change in zoning will be necessary. The exception is for the hospital's new development since that has been permitted and will proceed as anticipated. Montgomery County valuations were set in 1996 and are not expected to be reassessed until 2016. However, once the new construction has been completed, the hospital's properties will be assessed by the County and available for the value capture. Although the Verizon lot is considered to be a primary redevelopment site in Bryn Mawr, it was not included in the analysis since there is no current plan for it to be redeveloped. Thus, the analysis is very conservative in nature taking in the minimum amount of taxable redevelopment that is likely to or planned to occur. Also planned for redevelopment in the future is the area north of the hospital in the Central and Summit Grove Avenues area, but this was also not included in the analysis. The boundary utilized by Mac in his analysis was the new smaller TRID district that was requested at the last meeting.

Mac reviewed the contributions that would be expected from the Township and Montgomery County at 80% of total taxes generated and then added in the Lower Merion School District (LMSD) at 25% of their taxes. Although there is an obvious benefit to the participation of the School District, the Township anticipates long discussions in seeking their cooperation. LMSD cooperated at 50% in the creation of the Ardmore Crossing Affordable Housing project in Ardmore last year. Commissioner Zelov has asked the Township Manager to proceed with discussions with LMSD and Montgomery County to advise them of our project and secure feedback.

A question was raised as to whether the financial analysis included paying Amtrak for the remaining rights to develop Lot 7 with a private developer. This was not figured into the assumptions, but would be part of

whatever RFP was issued should Amtrak wish to go that route. It would be to the benefit of the Township to negotiate this agreement with Amtrak prior to issuing an RFP. In order to meet the requirements of the TRID legislation, agreements will have to be reached with both Septa and Amtrak and it would be helpful to have this matter resolved as part of the Amtrak agreement. The remaining items that will have to be resolved include finalizing the boundary, completing proposed zoning recommendations and then revising the value capture projections.

Charlie Bloom asked if the bonding of such debt were electoral or not. Doug Cleland confirmed that it is likely that such a bond would require approval by the Board of Commissioners. Doug clarified that his would not be an issue since the Township is way below its debt level which is a situation that is no likely to change. Charlie further expressed his support for the concept as the best way to insure that tax funds generated in Bryn Mawr would then return to Bryn Mawr. The alternative is to return year after year to the Board of Commissioners to secure funding through the capital improvement program for the various public improvements anticipated in the Bryn Mawr Master Plan that include streetscape, sidewalks, pedestrian and roadway improvements, transit improvements such as high level platforms and other ADA required infrastructure. Charlie reiterated that from the perspective of Bryn Mawr, he saw no down side to creating the TRID and suggested that the Committee move forward.

In addition, by creating the TRID we will be able to draw from the various state programs such as Elm Street, Main Street, LUPTAP, Smart Growth and others to secure matching funds for various projects.

Hank Wilson asked Mac what had surprised him in his analysis. He replied that the Pennsylvania tax code is very different from other places particularly given that the market values had not changed since 1996. The TRID may not produce a huge windfall at the outset, but once projects are completed over time, the funds will continue to grow. Mike Weilbacher noted the importance of the school district in participating as well as the importance of Central Avenue in the equation.

Hank asked Mac to discuss what an annual cash flow would be if we were not to move ahead with a bond issue. It would be approximately \$200,000 in the first year moving to an annual amount of \$500,000 in later years. Nancy Vickers noted that this is very hard work for \$6M, but there is still great potential for this to grow.

Rich Bickel responded to a question about other TRID projects that are being studied in Pennsylvania. There are five studies underway in Southeast PA funded by DVRPC including Cheltenham and Marcus Hook and another being done by PADOT for Ambler. There is at least one being studied in Beaver County and another in the Pittsburgh area. Rich encouraged the Township to begin calling on their state senators and representatives to get them involved in the process and so they are aware of the interest in creating the TRID for Bryn Mawr. Both Department of Community and Economic Development (DCED) and PADOT are keenly interested in working on these projects. Suggestions were made to invite Daylin Leach and Connie Williams to future public meetings on this particularly the fall public meeting.

Please note that the presentation has been placed on the Township website at [www.lowermerion.org](http://www.lowermerion.org). On the homepage, go to the scroll bar on the left side and click on "What's New." Scroll down and click on to Bryn Mawr Master Plan where you will find all the information posted at this site.


## 5. Future Meetings

We have confirmed that the Ad Hoc Bryn Mawr Committee will meet with Kathryn Madden on Thursday June 14<sup>th</sup> for the completion of the last zoning workshop. We hope to reach consensus on a working concept by the end of that meeting so that the information can be refined over the summer by the consultants and brought to the public in the early fall. We will begin our meeting with discussion of the revised boundary plan that is also posted on the Township website for your review. After our summer break, the next meeting will occur on Thursday September 21<sup>st</sup>. We are tentatively planning on having a presentation of the traffic study at this meeting. We have tentatively scheduled Wednesday September 26, 2007 for a public presentation. Please submit your homework assignments to me as soon as possible.

## TODs and TRIDs

*What are they?  
What can they accomplish?  
How do they fit in Bryn Mawr?*

Presentations to the  
Bryn Mawr Civic Association  
Bryn Mawr Business Association  
May 21/22, 2007



## Overview

**Summarize:**

- Transit-oriented development (TOD) concepts and issues
- PA's Transit Revitalization Investment District (TRID) Act
- TRID Planning and Implementation Process
- What's Next for proposed Bryn Mawr TRID?




## What is TOD?

**Transit-Oriented Development (TOD):**  
Mixed use, pedestrian scale real estate development oriented around and to a rail or transit station, transit stop or transportation center (usually within a 1/4 mile radius) that promotes transit ridership

**TOD involves a two-way relationship:**  
The proximity and connections to transit attract development and new development supports and enhances transit ridership

## What are TAD, TJD and TRID?



**TOD is NOT Transit-Adjacent Development (TAD):**  
Does not provide an orientation or direct connections to transit and does not promote ridership, even though it has general proximity

**Transit Joint Development (TJD):**  
Involves public transit agency/private sector partnership; sharing costs or revenues derived from development

**Transit Revitalization Investment Districts (TRID):**  
Pennsylvania legislation that can accomplish TOD and TJD

## Potential TOD Benefits

- Can create or reinforce greater community identity
- Can attract private sector investment and public-private partnerships
- Links land use and transportation to promote Smart Growth
- Supports environmental goals reducing mobile source air pollutants and energy consumption
- Is a new tool to promote positive community growth and change

## What Land Uses Are Transit Supportive?

- Convenience goods & service needs
- Uses that entertain; create day and night activity on the street
- Limit uses that interrupt the flow of interesting, pedestrian-generating, continuous storefronts:
  - Auto-Oriented Uses
  - Big Box or Warehousing




### What are Potential TOD Benefits?

- Can create or reinforce greater community identity
- Can attract private sector investment and public-private partnerships
- Links land use and transportation to promote *Smart Growth*
- Supports environmental goals: reducing mobile source air pollutants and energy consumption
- Is a new tool to promote positive community growth and change

### Philadelphia Region TODs in Progress

**Pennsbroke:**  
SEPTA R5,  
10 blocks,  
348 units  
on 34 acres



**Daylesford:**  
SEPTA K6,  
71 blocks,  
132 units  
on 13.3 acres



**Collingswood:**  
PATCO,  
29 blocks,  
119 units on 4 acres



### What is TRID?

- Transit Revitalization Investment District Act (TRID) is *new enabling legislation in PA*
  - Act 238 of 2004
  - Effective February 2005
- TRID offers *municipal officials, transit agencies and development community* a "how-to-do-it" approach (with flexibility and options) to: Plan for, Sustain and Implement TOD
- TRID is *not mandatory*, but offers the prospect of state funding support for planning and implementation, *if communities use it*

### What can TRID do?

- TRID offers communities a new tool to:**
- Foster community and neighborhood revitalization
  - Support local economic development goals
  - Help shape local development patterns
  - Overcome TOD barriers
- TRID offers transit agencies the opportunity to:**
- Partner with local governments and developers to advance TOD
  - Increase transit ridership
  - Share in real estate tax revenues to support capital projects and maintenance in TRID areas
- TRID offers developers a defined process:**
- With clear involvement and roles for the community and transit agency

### What does TRID provide?

- Flexibility:** TOD Around Bus or Rail Facilities and in Revitalization or Growth Area Settings
- Planning Study:** Supports Rationale, Proposed Improvements and Boundaries of TRID Area (includes Market Study)
- Value Capture:** Share of New Tax Revenues Reinvested in TRID Area Improvements (Financial Plan is required)
- Leveraging Benefits:** Encourages Use of Existing, Supportive Laws and Programs
- Partnerships:** Multi-Municipal, County, School District, Transit Agency, Private Sector
- Public Involvement:** in TRID Area Plan and Implementation Program

### TRID Process—Phase 1

- Planning Phase**
- Step 1** – Municipality and Transit Agency agree to work cooperatively to create TRID
  - Step 2** – Community and Transit Agency initiate discussions with County, School District and other agencies (as pertinent)
  - Step 3** – Municipality undertakes **TRID Planning Study** to determine location, boundaries and rationale
  - Step 4** – Municipality and Transit Agency conduct **Community Public Meeting(s)** on Planning Study
  - Step 5** – Planning Study is revised and completed
  - Step 6** – Municipality and Transit Agency accept Planning Study's findings and recommendations

### TRID Planning Study Contents

**TRID Planning Study's Required Contents** (Described in Sec. 103 Definitions)

1. Establish TRID area boundaries
2. Existing environmental conditions
3. Existing and proposed land use
4. Real estate market conditions, including property availability and development potential (use of air space, if applicable)
5. Required zoning approach and any amendments
6. Desired infrastructure and necessary transportation-related improvements
7. Financial plan, including: proposed funding sources, proposed amortization schedule (if applicable) and estimated future maintenance requirements

### TRID Planning Study Purpose and Intent

- Sec. 304, TRID Planning Study serves as basis for:
  - (1) scope and scale of transit and community facility improvements
  - (2) comprehensive plan amendment (if community has an adopted plan)
- **Planning Study Considerations:**
  - a. Need for capital improvements to transit-related facilities and adjacent public infrastructure
  - b. Opportunities for private sector real estate development
  - c. Ways in which such facilities, services and development can be financed

### TRID Area Boundaries

Alternative Schematic Mapping Circles from Station

Boundaries are refined by TRID Planning Study to reflect local needs, opportunities and characteristics

### Current Draft Bryn Mawr Area TRID Boundaries

Proposed TRID Boundaries Reflecting Local Conditions and Goals

Lower Merion Township Montgomery County, PA

Bryn Mawr Station, SEPTA R5 Regional Rail Line

Source: Sarah Associates, Inc.

### TRID Process—Phase 2

**Program Management Phase**

- Step 1 – Municipality designates a **Management Entity** to administer TRID implementation
- Step 2 – Municipality and Transit Agency prepare project lists of **Public Sector Infrastructure Improvements**, including costs, phasing and maintenance
- Step 3 – Municipality and Transit Agency coordinate with School District and County (and others) on **Value Capture shares**, schedule, **TRID Financial Plan** and other programs
- Step 4 – Municipality and Transit Agency hold **Community Public Meeting** on TRID implementation improvements
- Step 5 – **Municipality/Transit Agency Agreement** executed on roles, responsibilities, financial commitments, management entity and defined improvements

### TRID Process—Phase 3

**Implementation Phase**

- Step 1 – TRID Management Entity solicits **Developer Interest**
- Step 2 – Development proposal accepted by TRID Management Entity and municipality
- Step 3 – TRID Management Entity executes **Development Agreement** with successful Developer, including **Public Sector Improvements** and **Private Sector Financial or Project Commitments**
- Step 4 – Project construction and completion
- Step 5 – TRID Management Entity administers **Value Capture revenues and expenditures** in accordance with approved Implementation Program
- Step 6 – Amendments to Agreement or TRID Plan, as required

## DCED TRID Funding & LUPTAP Application Process

TRID Program is administered by PA Department of Community and Economic Development (DCED)

- **Grant Funding:** \$75,000 maximum grant; 25% match
- **Required match:** Can either be cash or combination of cash and in-kind services
- **Incentive:** Local governments undertaking TRID Planning Study "shall receive priority consideration for planning and implementation grants and technical assistance from DCED and other State agencies (with applicable grant or loan programs)" (Sec. 304 (2) and (3) of the Act)

## TRID Grants in Southeastern PA

- **Croydon Station**  
SEPTA R7 Regional Rail
- **Marcus Hook Station**  
SEPTA R2 Regional Rail
- **46<sup>th</sup> Street Station**  
SEPTA Market-Frankford Elevated
- **Temple University Station**  
SEPTA R6 Regional Rail
- **Ambler Station**  
SEPTA R5 Regional Rail
- **Pending: Bryn Mawr Station**  
SEPTA R3 Regional Rail



## Next Steps for Bryn Mawr TRID Planning Process

- Complete TRID Planning Study Phase, including Final TRID Area Boundaries and Value Capture Evaluation
- Decide Whether to Advance TRID Approach
- If Yes:
  - Determine Form and Composition of Management Entity
  - Seek TRID Implementation Funding from DCED
  - Proceed Through Steps in TRID Management and Implementation Phases

Thank You

Richard G. Bickel, AICP  
Director, Division of Planning  
DVRPC  
717-333-2330  
rbickel@dvrpc.org

## What are Barriers to TOD?

- Lack of Development Receptivity (Plans and Ordinances)
- Lack of Transit Agency Participation (Partner or Obstacle)
- Parking Issues (Replacement, Location, Design)
- Traffic Generation (Local; Perception v. Reality)
- NIMBY (Meet the Neighbors!)

## Lessons Learned

1. Attitudes/concerns about higher density, more so than mixed use, shape initial municipal and citizen reactions to TODs
2. Parking and local traffic generation are predominant "nuisance" concerns of local residents
3. Partnership with public transit agency is critical (and required for TRID) and can help to gain municipal support
4. Partnership with a developer can be helpful, but may also produce backlash from municipal officials or the public
5. Need successful suburban project examples to allay fears about this new (for many) development concept
6. TOD should not be "sold" as a panacea, but as a desirable development alternative in the right locations

# BRYN MAWR MASTER PLAN



Presentation to Bryn Mawr Civic and Business Associations

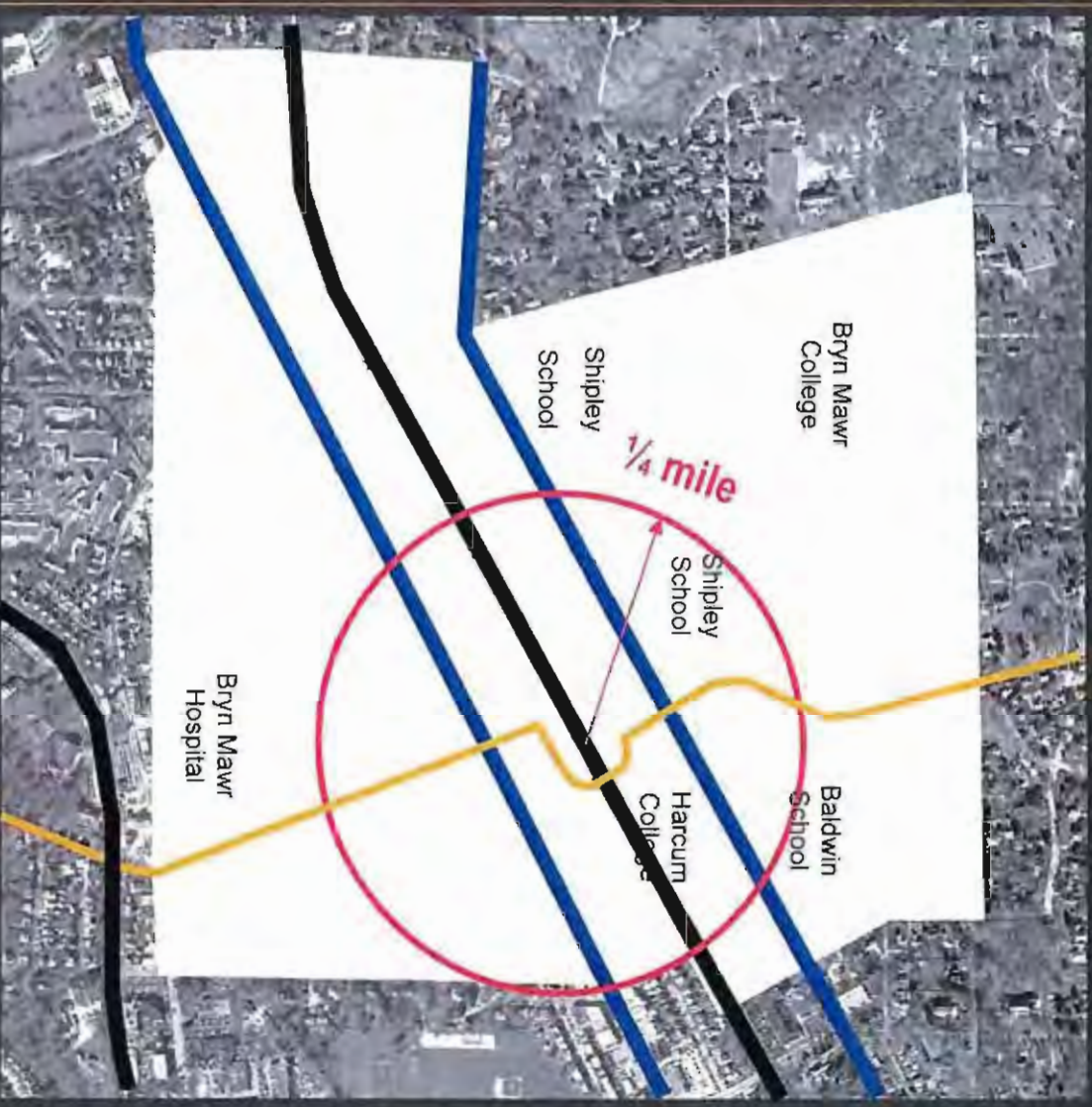
May 21-22, 2007

SASAKI ERA

Civ ic Vi s i o n s

# BACKGROUND

- Hospital expansion
- Lack of comprehensive vision
- Character of street and retail on Lancaster Avenue
- Linear corridors as barriers
- Circulation around train station
- Student integration
- Relationship of hospital and colleges to town center
- Lack of identity on Main Line





# DISTRICT PLAN

## Civic Realm

- Parks
- Plazas
- Campuses
- Streetscapes
- Civic/cultural buildings



# DISTRICT PLAN

## Main Line Village

A forward-looking and distinctive identity based on historic town relationships and current strengths

## Civic Places

New activity and sense of place at the Station, Town Square, Community Center, Central Avenue, and Lancaster Avenue

## Connectivity

Attract populations that already live, work and study within walking distance of the village



# DEVELOPMENT OPPORTUNITIES



## Market Potential

### Retail

- Support for additional 820,000 sf

### Residential

- Mid to up-scale apartments

### Hotel

- 60 to 125 room boutique hotel

### Civic

- Theater expansion
- Library expansion
- Fire station

### Projected Medical Office Program

- 300,000 sf

# DEVELOPMENT OPPORTUNITIES

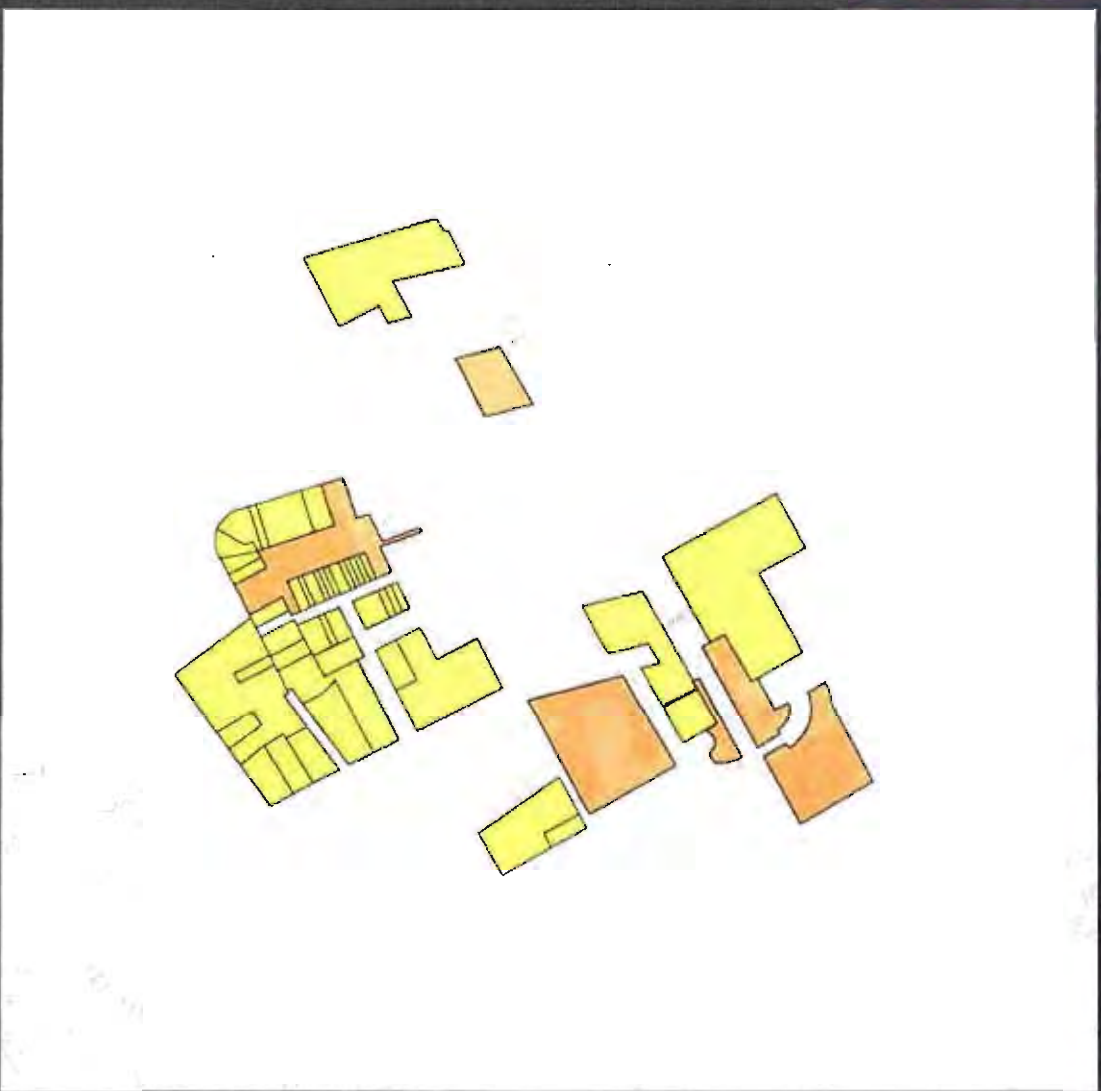


Private / institutional parcels



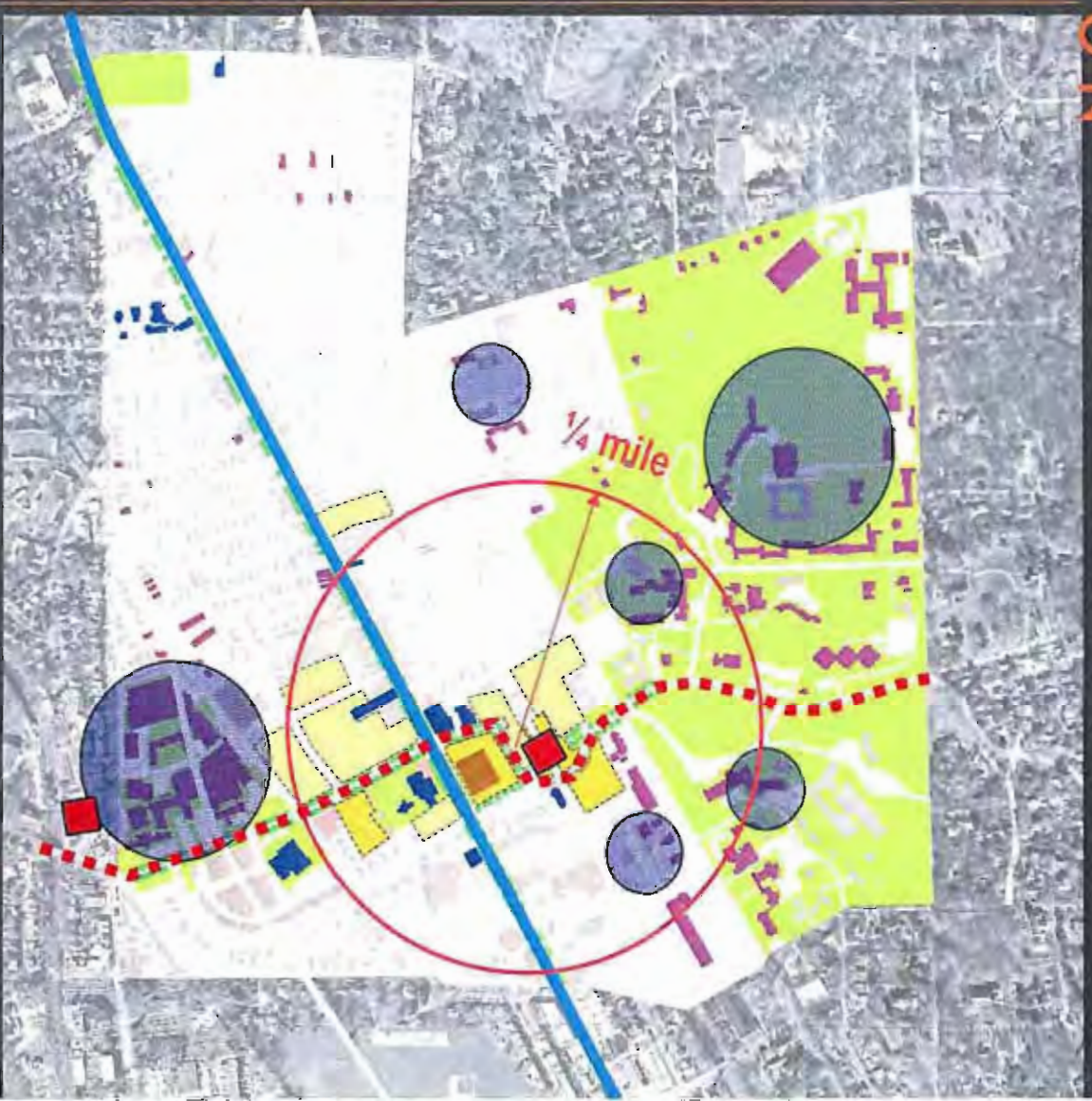
Public parcels

	Floor area (gsf)
Retail/restaurant	166,600
Residential/hotel	679,000
Office	185,400
Library expansion	7,700
Theater expansion	7,500
Transit facilities	5,200
<b>Total</b>	<b>1,051,300</b>
Net new parking	1,600 spaces



# TRANSPORTATION

- North south axis
- Transit focus



# STRATEGY

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## Policy Priorities

- Traffic engineering study
- Transit Revitalization Investment District (TRID) plan and implementation
- Retail plan, design guidelines, follow-through leasing, façade improvement incentives
- National Register Historic District
- Transit related development zoning overlay
- Workforce housing

# STRATEGY

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## Priority Capital Projects

1 to 5 years

- Lot 7 redevelopment
- Central Avenue redevelopment
- Traffic improvements
- Streetscape

6 to 10 years

- Continue streetscape
- Addition to Ludington Library
- New fire station

11 to 20 years

- Bryn Mawr Community Center
- Train Station

# STRATEGY

Transit Oriented  
Development Goals

- 
- Mix of uses close to transit to encourage pedestrians and minimize traffic congestion
  - Livability and identity of the neighborhood
  - No "big box" and strip centers
  - Design standards to enhance the character, scale and architecture
  - Pedestrian-friendly off-street parking facilities
  - Shared parking



# STRATEGY

## Recommended Development Guidelines



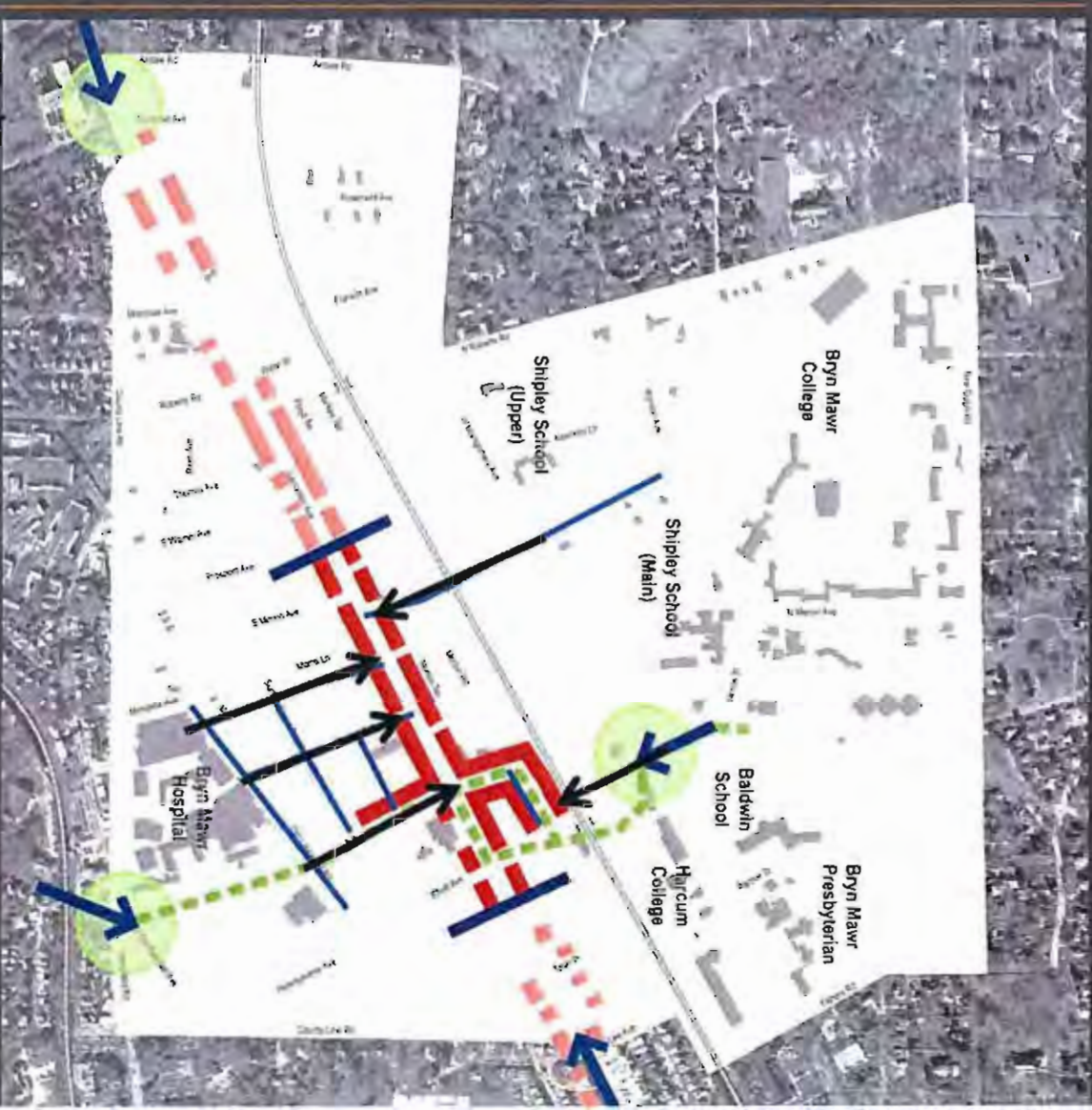
- Mix of uses: retail, restaurant, office, residential, cultural, civic
- Retail targeted to Lancaster Avenue/Bryn Mawr Avenue; service, passive retail uses on secondary streets
- Build-to-Lines at the street right-of-way
- Zero lot side yards
- Impervious cover of 85 to 100 percent
- Minimize visual impacts of parking structures
- Shared parking
- Street level front doors and retail transparency
- Articulation of building facades and roof lines
- Consistent street wall of 24 to 35 feet
- Step-backs for upper levels up to 65 feet
- Density incentives for achieving civic goals

## Transit Revitalization Investment District (TRID)

- TRID offers municipalities, transit agencies, and development community a mechanism to plan and implement transit-oriented development (TOD)
- TRID provides:
  - Flexible development around transit using existing supportive laws and programs
  - Partnership mechanism for municipalities and transit agencies
  - Funding for TOD planning and (potentially) implementation
  - Funding mechanisms for improvements, maintenance and infrastructure
    - Improvement district assessments (similar to NID/BID)
    - Value capture for improvements, maintenance, and reserve for replacement
  - Public involvement

# PRINCIPLES

1. Create a network of pedestrian-friendly streets
2. Celebrate the points of arrival to the village
3. Concentrate retail on Lancaster and Bryn Mawr
4. Connect the hospital and schools to the center



# IMPLEMENTATION

## Existing land uses

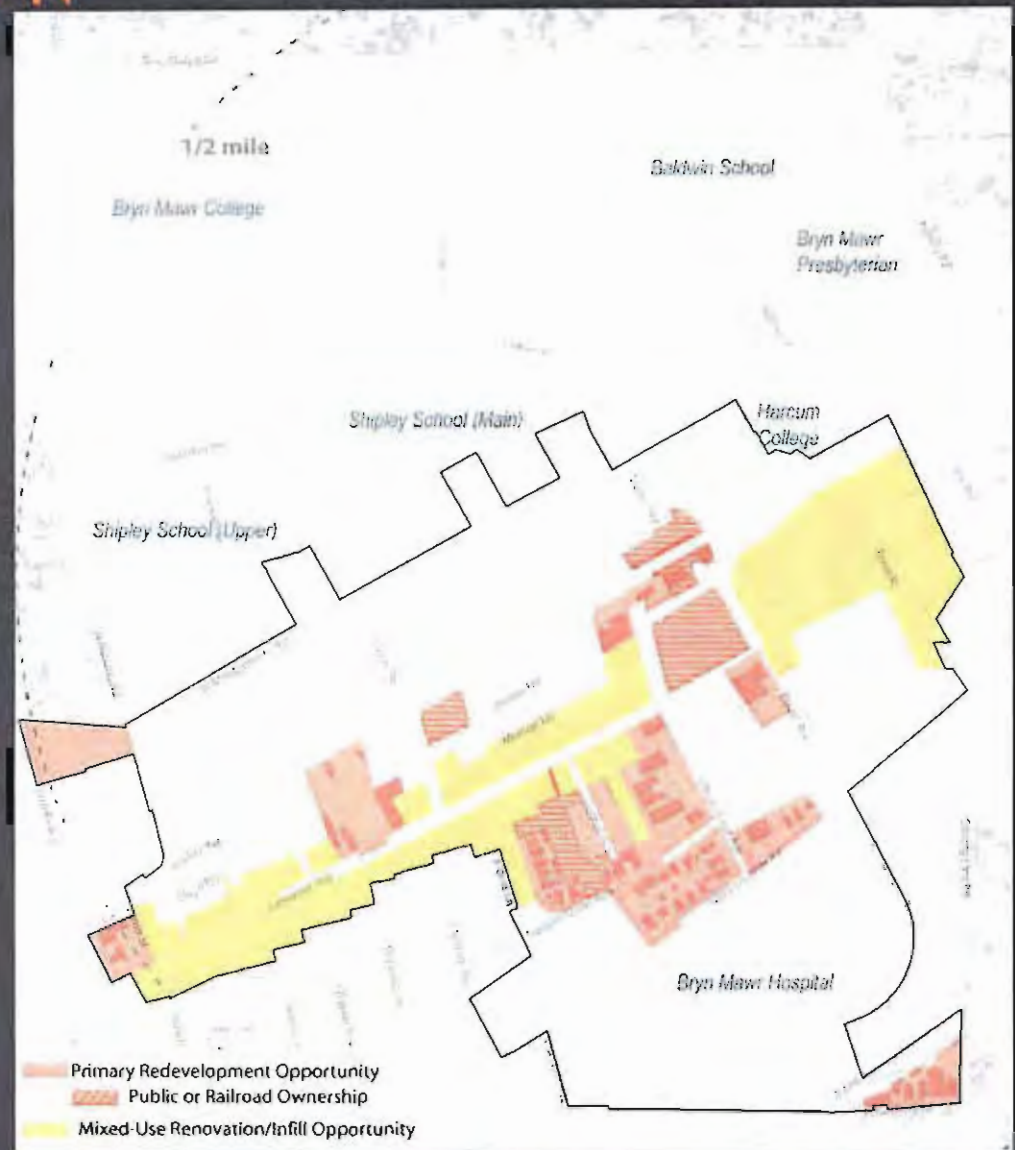
- Commercial district
- Surrounding residential
- Major institutions and churches
- Focused parks



# IMPLEMENTATION

Available development sites

- Reinvestment/renovation areas
- Infill sites short and long term



# PRINCIPLES

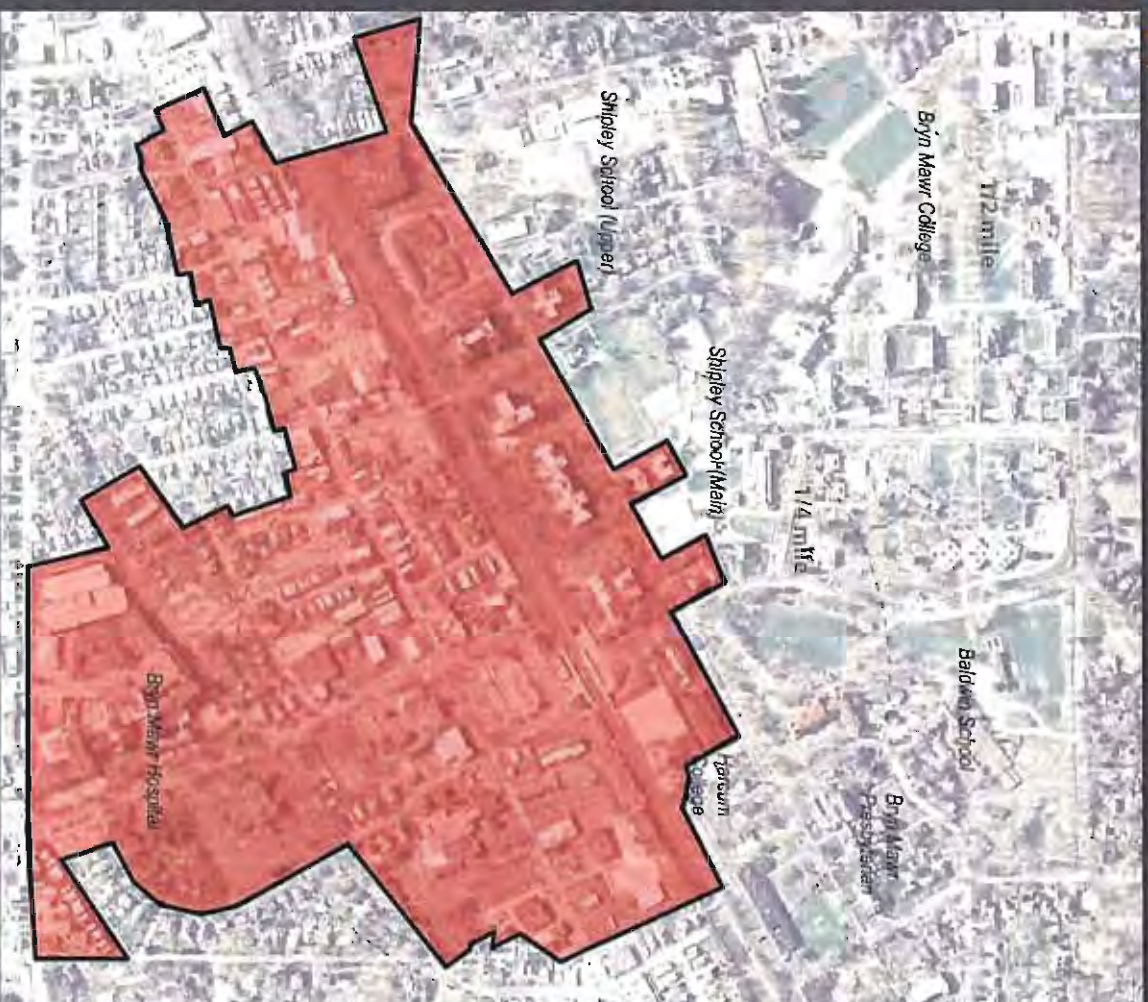
5. Encourage transit-oriented development
6. Promote a variety of housing types
7. Develop civic spaces that promote community use



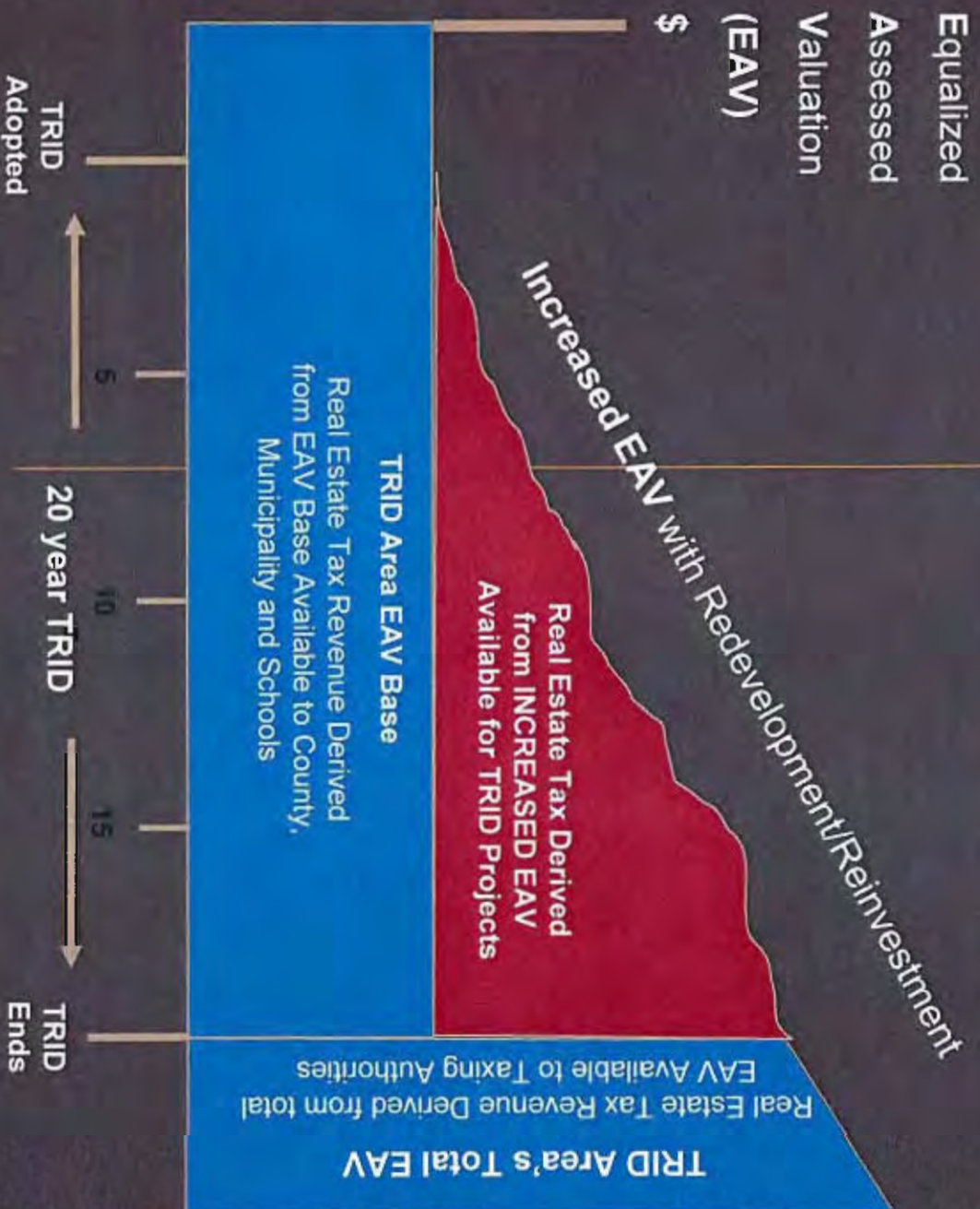
# IMPLEMENTATION

## TRID Boundary

- Coherent investment district of 146 acres
- Private infill development
- Renovation and reinvestment
- Transit improvements
- Pedestrian and street improvements



# What Do We Mean By "Value Capture"?





# Assumptions

## Financial Assumptions

- ▶ Lot 7 is assumed to be developed according to preferred program included in Bryn Mawr master plan with zoning and density sufficient to execute the development program.
- ▶ Annual value increase of total TRID area properties assumed to be 3% (for inflation).
- ▶ No additional improvements assumed.
- ▶ Revenue projections for total TRID boundary area do not include Montgomery Avenue properties.

## Fiscal Assumptions

- ▶ Total Current Millage Rate: 24.452
  - County Rate: 2.84
  - LMT Rate: 3.54
  - Schools Rate: 18.878
- ▶ “All-in” combined rate is assumed to include:
  - 80% of Township Millage
  - 80% of County Millage
  - 25% of School Millage
- ▶ Alternative: 80% Township; 80% County
- ▶ Township and County Millage Rate increased at 3% per year
- ▶ School Millage Rate increased annually at 5%

# Value Capture Analysis

## Current Assessed Values

Total Preliminary TRID Area (including Montgomery Avenue & BMH & Lot 7 Planned Developments)	\$ 149,381,880
Total Preliminary TRID Area (excluding Montgomery Avenue & Planned Developments)	\$ 130,280,790
Bryn Mawr Hospital Development Program Properties	\$ 7,902,190
Lot 7 (Exempt)	\$ -
<b>TOTAL (initial TRID boundary)</b>	<b>\$ 157,284,070</b>
<b>TOTAL (TRID w/o Montgomery Ave)</b>	<b>\$ 138,182,980</b>

## Estimated Value of Improvements - BMH & Lot 7

Improvement	Estimated Assessed Value
▶ BMH Old Lancaster MOB	\$16,953,507
▶ BMH Old Lancaster Parking Lot	\$ 252,826
▶ BMH Founders MOB	\$ 12,686,298
▶ BMH Founders Parking Garage	\$ 8,381,321
▶ BMH Townhouses	\$ 16,392,273
▶ Lot 7 Residential	\$ 14,753,046
▶ Lot 7 Retail	\$ 4,250,880
▶ Lot 7 Garage	\$ 2,225,023

# Value Capture Summary

LMT+County+Schools (80%/25%)
▶ 20 – Year Tax Revenues with BMH & Lot 7 Developments
▶ 20 – Year Cumulative Tax Revenues Available in TRID
▶ NPV @4.5% Discount Rate

Tax Revenues
\$ 50,515,388
\$ 24,685,998
\$13,918,000

LMT+County (80%)
▶ 20 – Year Tax Revenues with BMH & Lot 7 Developments
▶ 20 – Year Cumulative Tax Revenues Available in TRID
▶ NPV @4.5% Discount Rate

Tax Revenues
\$ 24,426,046
\$ 11,005,859
\$6,312,000

# Decision Options

- Continue with TRID Planning Process
  - Finalize TRID area boundary
  - Finalize value capture analysis estimates, including potential for Central Avenue and Verizon lot.
  - Identify sources and uses of funds
    - Explore additional state funding
    - Short-term funding for commuter parking structure
    - Estimates for priority projects identified in Bryn Mawr Master Plan
    - Preferred funding approaches
  - Prepare initial zoning approach, overlay and timeline for implementation
  - Negotiate agreements with Schools, County, Amtrak, and SEPTA
  - Prepare draft TRID plan with all sections required by statute
  - Submit TRID Plan to Township Commission approval following public hearing
  - Commuter Structure development program implementation
  - Lot 7 RFP process
- Implement Master Plan without TRID
  - Complete zoning analysis in conjunction with the Bryn Mawr Master Plan
  - Identify potential sources of funds for priority projects and timeline.
  - Development of commuter parking structure
  - Lot 7 RFP process and development

# Criteria for Successful TRID Agreement

1. No eminent domain
2. Ad Hoc Committee support
3. No single purpose residential neighborhoods within boundary
4. Money generated must be worth new financial structure
5. Ability to finance projects the Village wants and needs: train station improvements, parking decks, streetscape
6. Satisfactory definition of "transportation purpose"
7. Town definition of SEPTA-related benefits within the district (eg. train station improvements)
8. Ability to change Lot 7

# Criteria for Successful Village Zoning

1. Maintain village character
2. Traffic impacts addressed
3. Density added only in appropriate places (i.e. around station)
4. Ad Hoc Committee support

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, June 14, 2007 at 4:00 PM**

**Zoning Workshop Notes**

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Susan Arizini  
Vincent DiCioccio  
Mike Fanning  
Nancy Vickers  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

**Guests:**

Kathryn Madden, Sasaki Associates  
Lynn Hoffman, Sasaki Associates  
Commissioner Cheryl Gelber  
Dave Fogel, Septa  
Brian O'Leary, Montgomery County Planning Commission

**Staff in Attendance:**

Doug Cleland  
Angela Murray  
Eric Persson  
Bob Duncan

1. Report from the Chairman

Chairman Scott Zelov welcomed the members and introduced Commissioner Cheryl Gelber. Scott reviewed the upcoming schedule including a presentation at the next meeting of the Bryn Mawr Civic Association on Monday June 18, 2007 at 7:00 PM. Mac Nichols from Economics Research Associates will be presenting information regarding the TRID boundary and value capture.

At the Thursday September 20<sup>th</sup> meeting, the Committee will have a presentation from Gannett Fleming of the traffic analysis that is now underway. On Wednesday September 26, there is a meeting scheduled to present both TRID and Zoning analysis to the public and Board of Commissioners. This meeting will be led by Kathryn Madden and Mac Nichols.

The article by reporter Jeff Shields that appeared in Wednesday's Philadelphia Inquirer was somewhat disappointing. The headline of Renewal v. Preservation presents a false choice and is based on an incorrect premise.



## 2. Zoning Workshop Continuation

Kathryn Madden began the discussion with a review of the agenda. She explained that she and colleague Lynn Hoffman had spent the day with Township staff and Commissioner Zelov reviewing and testing the design parameters to be presented. Utilizing the bound handout that incorporated the information from the first workshop, she led the group through a review of the regulatory structure she was proposing. Kathryn explained that the four sources of information drawn from were the Township's Mixed-Use Special Transit (MUST) Ordinance; the Montgomery County Planning Commission's Model Town Center Ordinance; Congress for New Urbanism's SmartCode T-5 Neighborhood Center Zone and the Township's existing commercial district zoning.

Kathryn noted that it is very difficult to regulate good design, but that the existing zoning is outdated and has resulted in outcomes inconsistent with village character. The goal is to allow financially feasible but appropriate redevelopment in those locations where it is desired, but protect those areas that should be preserved. Sites such as Verizon, Carpet Diem, the Liquor Store and the MRI are all sites that would benefit from redevelopment and revitalization.

Kathryn began with a review of the parking requirements noted in each of the different ordinances. She explained that 5 cars per 1,000 SF represent requirements at the King of Prussia Mall. She believes that in general the Township's requirements are too high and that 3:1,000 should be the norm for commercial and 1.5 cars per unit is acceptable for transit districts such as Bryn Mawr where walking is more the norm. Members responded that they have concerns that residents believe that there is not enough retail parking available in the business district now. Bob Duncan responded to a question about the parking at Bryn Mawr Square that a number less than the current code requirement resulted from pre-existing non-conformities. Bob also noted that the higher parking requirements have served as a limitation on development in the Township.

Shared Parking is another recommendation for Bryn Mawr that already exists in the MUST. However, given the desire to fill in the gaps between the village center and the suburban strip centers, how this is utilized may need to be different than in Ardmore. The advantage of mixed-uses development is that the parking needs of different users are satisfied at different peak hours thus reducing demand and lessening congestion.

As Gannett Fleming designs the improvements around Lot 7, we will have to work with PADOT to insure the right solutions are found for traffic improvements. A question was raised about the impact on traffic of residential units adjacent to the train station. Kathryn explained that a "modal split" would likely be used to estimate traffic flows from development close to the station.

The base assumption of Transit Oriented Development (TOD) is that people who choose to live close to transit facilities are making that choice to regularly use public transportation and live urban life styles. Studies are beginning to confirm the beneficial impact of TOD on transit ridership and automobile trip reduction. Staff and Kathryn will provide TOD case studies to the Committee members in response to questions regarding how this is done in other communities.

Kathryn moved to the section on Uses and raised the question of what should be permitted, conditional and prohibited in the Village zone? All agreed that car sales, drive-through windows, industrial and similar uses would fit the prohibited category. However, there was less agreement on the definition of "service" uses and where these should be allowed. With the proliferation of banks all along Lancaster Avenue, requiring longitudinal separation might make sense. The loss of retail storefronts to service uses resulting in reduction of display windows is another expressed

concern. Kathryn suggested that professional service/office uses such as doctors and dentist offices should be located on second floors or on secondary side streets. There was concern expressed for how to protect local retailers from rising rents and how to persuade property owners to rent to appropriate uses and not allow their buildings to sit vacant for long periods of time. These are difficult but not impossible issues to manage via the zoning code.

Kathryn reviewed the "Intent" section of the presentation to be sure that committee members were in agreement with the goals for zoning discussed at the last meeting. They include encouraging economic development while maintaining traditional Main Street character; promote pedestrian friendly streets and buildings; encourage active ground floor retail; protect existing residential neighborhoods; reduce auto dependency by promoting transit ridership; encourage historically appropriate adaptive reuse of structures.

Development studies showing various heights, floor area ratios (FAR) and set back requirements were shown for improvements to Lot 7 and then to the Verizon lot on Lancaster Avenue. These bulk and scale models demonstrated how the regulatory requirements can manage the redevelopment of these sites. Discussion among the members was focused on Lot 7 since this is the most likely location to expect redevelopment once appropriate zoning controls are in place. Kathryn will refine the concepts including one that would show a pyramidal arrangement allowing height in the middle of the site.

Committee members expressed concern that this information be presented to the public in a carefully thought out process and then incorporated into the community vision. Another concern was that certain community members are expecting Lot 7 to become green space. Kathryn suggested that we continue to emphasize that the village green is at the Community Center. The focus should be on a redevelopment concept that includes a building mix with a public plaza.

Development standards were presented to the committee for discussion. These included minimum lot size and width; build-to-lines and side yard setbacks including landscaping areas in front of structures; impervious cover requirements; building height including step-back requirements and reductions if located within 100 ft. of R-4/R-6 districts; protection of historic structures. Parking ratios and service needs (trash, mechanical, screening) were also reviewed and discussed.

Bonus provisions tied to FAR were then reviewed and agreed upon. The bonuses would apply for the provision of affordable housing, location within 400 feet of the Bryn Mawr station; public space; historic rehabilitation with public amenities; underground parking. These will be revised by Kathryn and presented at a future meeting.

The next point of discussion was Design Standards and how best to implement them in Bryn Mawr. Architectural Design standards have been incorporated in the MUST which is an overlay on existing commercial uses that include C-1, C-2, CL, ASDD-1 and ASDD-2 districts. This is the traditional way that such standards have been utilized under PA land use law. Whether properties are rezoned and then a separate overlay is used for this purpose or, as in the MUST, all regulations are within an Overlay will have to be decided.

The major issues of concern include sidewalks, materials, building character and orientation, entrances, transparency, roof lines and architectural rhythm and building mass. Streetscape and green area standards including urban gardens, green buildings, street trees and public plazas will also be incorporated into the requirements along with appropriate signage controls.

### 3. TRID Boundary Update

Kathryn presented a modified new boundary map that removed some additional older residential areas that are zoned R-4 or R-6. This led to a lively discussion among committee members about the most important criteria needed to assure their support of a TRID district. There was concern expressed about some of the issues that had been raised at the community meeting regarding what Septa could or could not do within a TRID District. Commissioner Zelov reviewed the pertinent e-mail message sent by the Township Manager that was provided to each of the Committee members confirming the findings of the Township Solicitor on this matter.

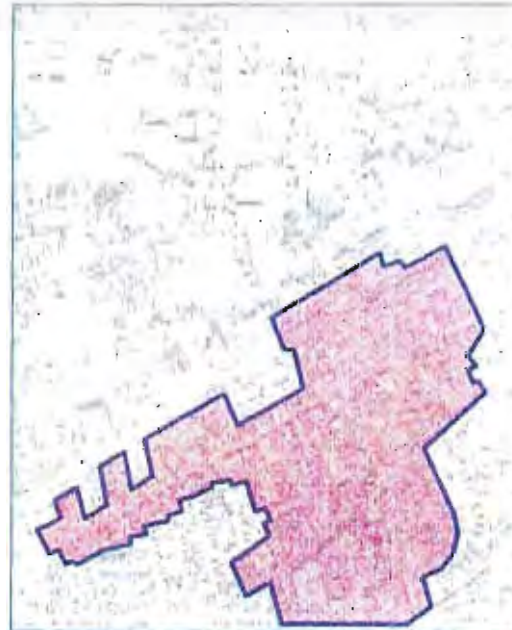
Attached to this are notes prepared at the meeting by Kathryn Madden on the criteria that were important to each of the Committee members for both the TRID and the Village zoning concept.

### 4. Next Meeting

**It was decided by those present that another meeting of the Committee should occur at the regular date and time on Thursday July 19, 2007 at 5:30 PM and ending no later than 7:00 PM.** We hope Kathryn Madden will be able to join us for this meeting. Please note that this is a change from the prior decision to not meet in July and August. We will not meet in August, but will then resume again in September.

# Bryn Mawr TRID Planning Analysis

An analysis of real estate assessment value potentially available to be captured for TRID project funding



20 June 2007

## Agenda

- I. Introduction to TRID
  - I. TRID Basics
  - II. Bryn Mawr TRID Study Approach
- II. Value Capture
- III. Approach & Methodology
- IV. Value Capture Estimates
- V. Considerations, Decision Options & Next Steps

## Transit Revitalization Investment District (TRID)

- TRID offers municipalities, transit agencies, and development community a mechanism to plan and implement transit-oriented development (TOD)
- Planning and funding tool to support revitalization, redevelopment, and development adjacent to transit
  - State funds for planning
  - Potential for state funding for projects, etc. (authorized, but not appropriated)
- Encourages cooperative agreements and relationships among and between taxing authorities (County, Township, and Schools) and transit entities (Amtrak and SEPTA).
- Primary funding mechanism uses “value capture” to target revenue and expenditures in designated area for 20 years
  - Funding mechanism functions similar to Tax Increment Finance (TIF) using “value capture”
  - *Does not raise tax rates or increase taxes to property owners*

## Introduction to Transit Revitalization Investment District (TRID)

- Provides flexible tool to help make improvements to transit station and surrounding areas
  - Focuses financial resources in the revitalization area for specific period to support infrastructure improvements
  - Does *not* involve raising taxes; uses “value capture” structure
- Creates a cooperative structure for local government and transit
  - Share of benefits defined in the TRID agreement between local government and transit agencies
  - Projects only within the TRID boundary area
- Each TRID plan is locally designed, developed and implemented
  - Township will define the structure of TRID, use of funds, and management to support improvements in Bryn Mawr
  - Township will negotiate benefit, “transportation-benefit”, and other cooperative elements
- Public input built into the TRID planning process

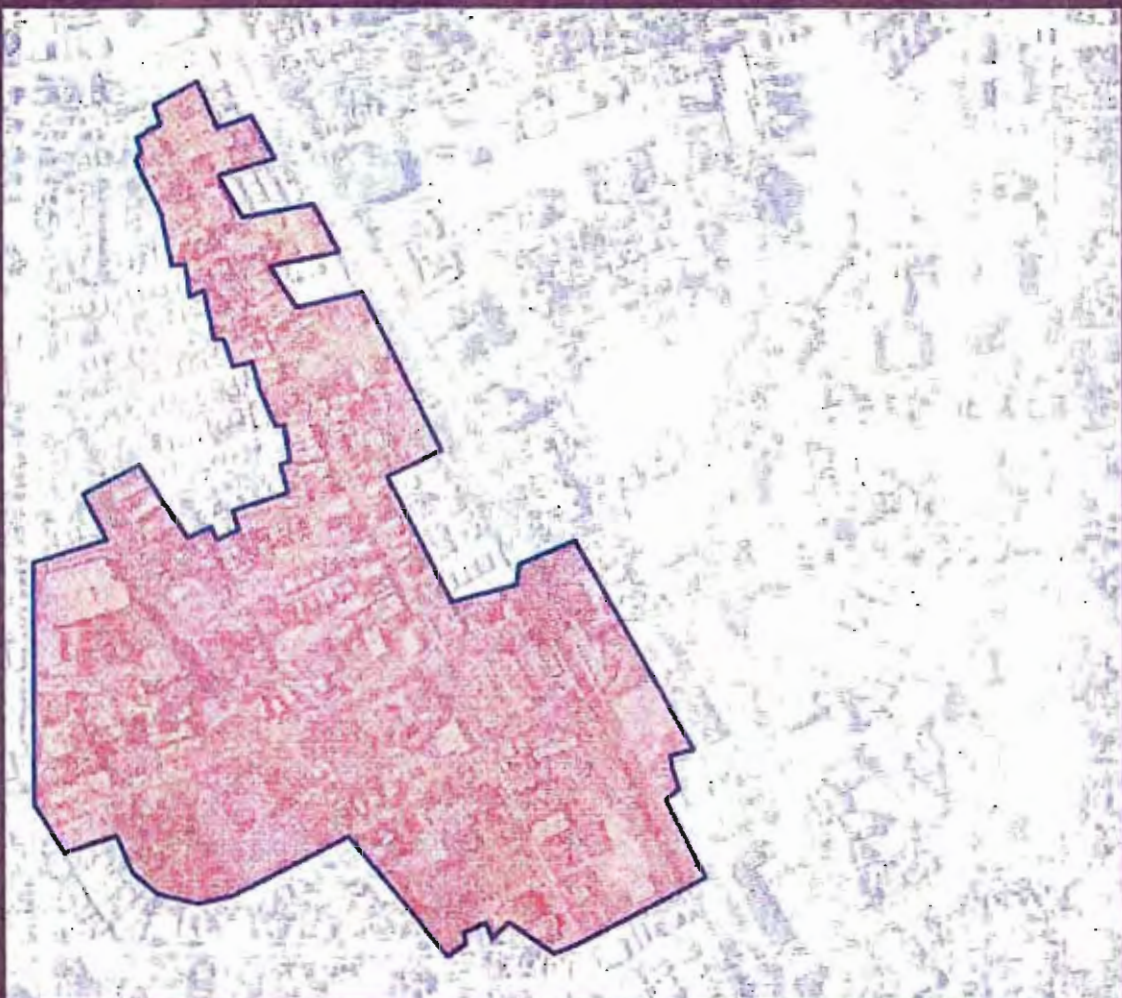
## Criteria and Planning Assumptions Developed by *AD Hoc* Bryn Mawr Committee for TRID Plan

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1. No eminent domain
2. Bryn Mawr *Ad Hoc* Committee support
3. No single purpose residential neighborhoods within boundary
4. Money generated by value capture must be worth new financial structure
5. Ability to finance projects the Village wants and needs: train station improvements, Morris Avenue underpass, parking, etc.
6. Satisfactory definition of "transportation purpose" and projects
7. Town Center Priorities established within the district (example: Lot 7 improvements)
8. Ability to implement redevelopment of Lot 7



# Bryn Mawr Proposed TRID Boundary

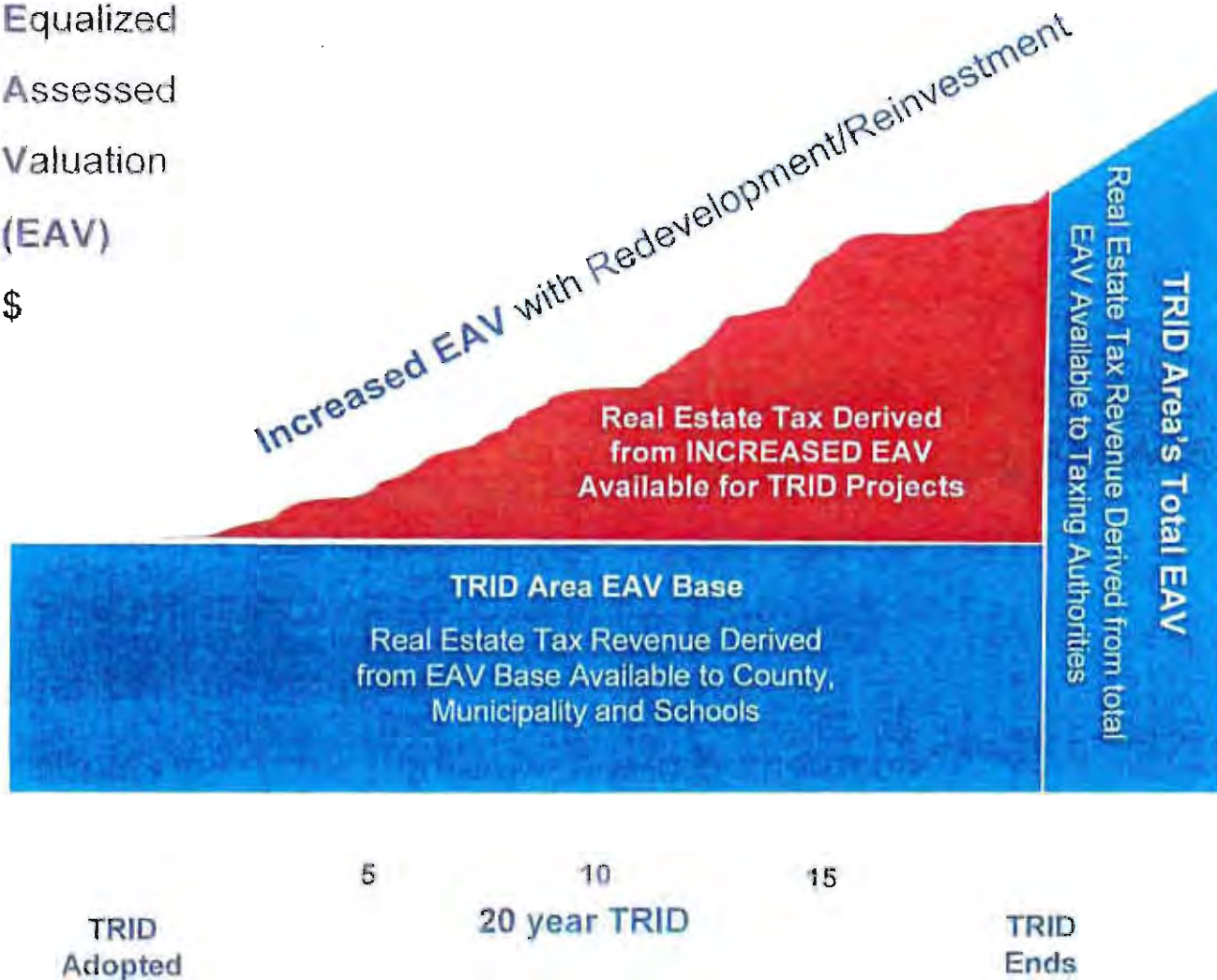


## Potential Projects (from Bryn Master Plan)

- Lot 7 redevelopment infrastructure
- Station accessibility and infrastructure improvements
- Commuter parking structure
- Central Avenue area redevelopment infrastructure
- Traffic improvements
- Streetscape and intersection improvements at Morris Avenue underpass
- Streetscape improvements to Bryn Mawr Lancaster Avenue commercial corridor

# What Do We Mean By "Value Capture"?

Equalized  
Assessed  
Valuation  
(EAV)  
\$



# Assumptions

## Financial Assumptions

- ▶ Lot 7, Central Avenue, and Verizon lot are assumed to be developed according to preferred program included in Bryn Mawr master plan with zoning and density sufficient to execute the development program.
- ▶ Annual value increase of total TRID area properties assumed to be 3% (for inflation).
- ▶ No additional improvements assumed.

## Fiscal Assumptions

- ▶ Total Current Millage Rate: 24.452
  - County Rate: 2.84
  - LMT Rate: 3.54
  - Schools Rate: 18.878
- ▶ Township and County Millage Rate increased at 3% per year
- ▶ School Millage Rate increased annually at 5%

## TRID Value Capture Analysis

- Because of limited projects focused on Bryn Mawr Hospital developments; estimates for Lot 7, Central Avenue area, and Verizon lot.
- All value capture revenues dependent on private sector action, timing & phasing
- Development program for Lot 7, Central Avenue, and Verizon lot based on Master Plan.
- Available revenue will need to cover improvements and administration. ERA recommends administration should be handled internally by the Township
- Lot 7 development and revenue dependent on accommodating parking at another site.
- Agreement with Amtrak/SEPTA to focus on improvements to the station and commuter parking.

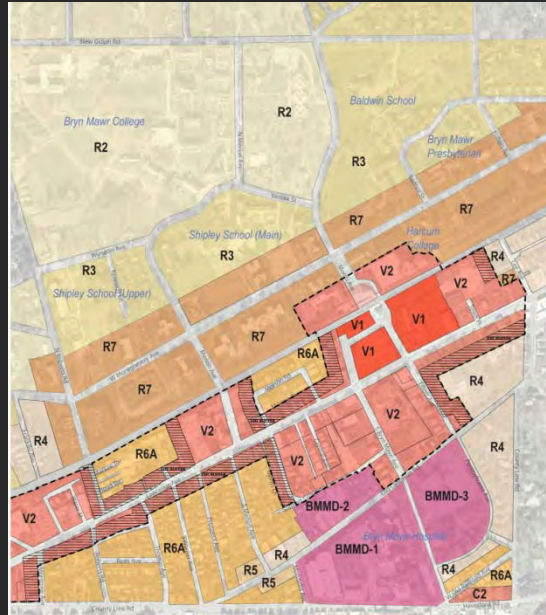
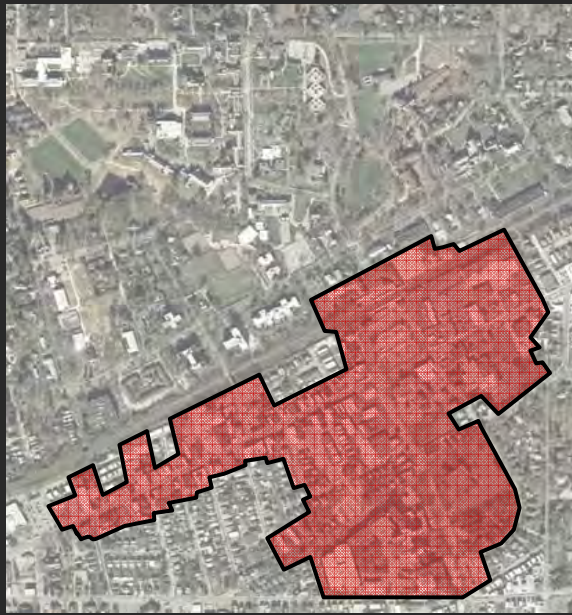
## Next Steps

- Finalize TRID area boundary
- Finalize value capture analysis estimates
- Research additional state funding
- Estimates for priority projects identified in Bryn Mawr Master Plan
- Negotiate agreements with Schools, County, Amtrak, and SEPTA
- Prepare draft TRID plan with all sections required by statute
- Submit TRID Plan to Township Commissioners for approval following public hearing

Bryn Mawr Master Plan / TRID

# ZONING WORKSHOP # 3

18 July 2007



# OVERVIEW

Zoning Workshops in April, June and July 2007

- Research zoning models
- Identify concepts
- Test form

Criteria for Successful Zoning

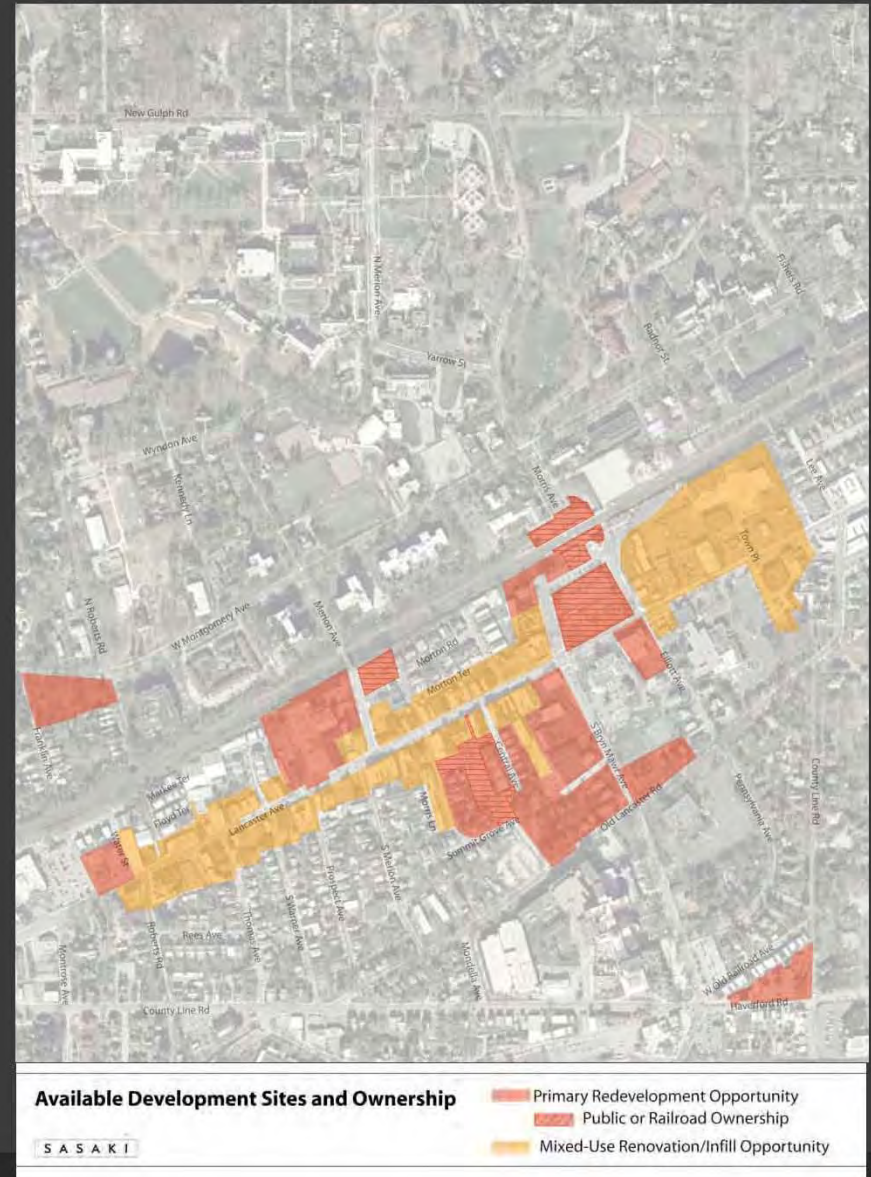
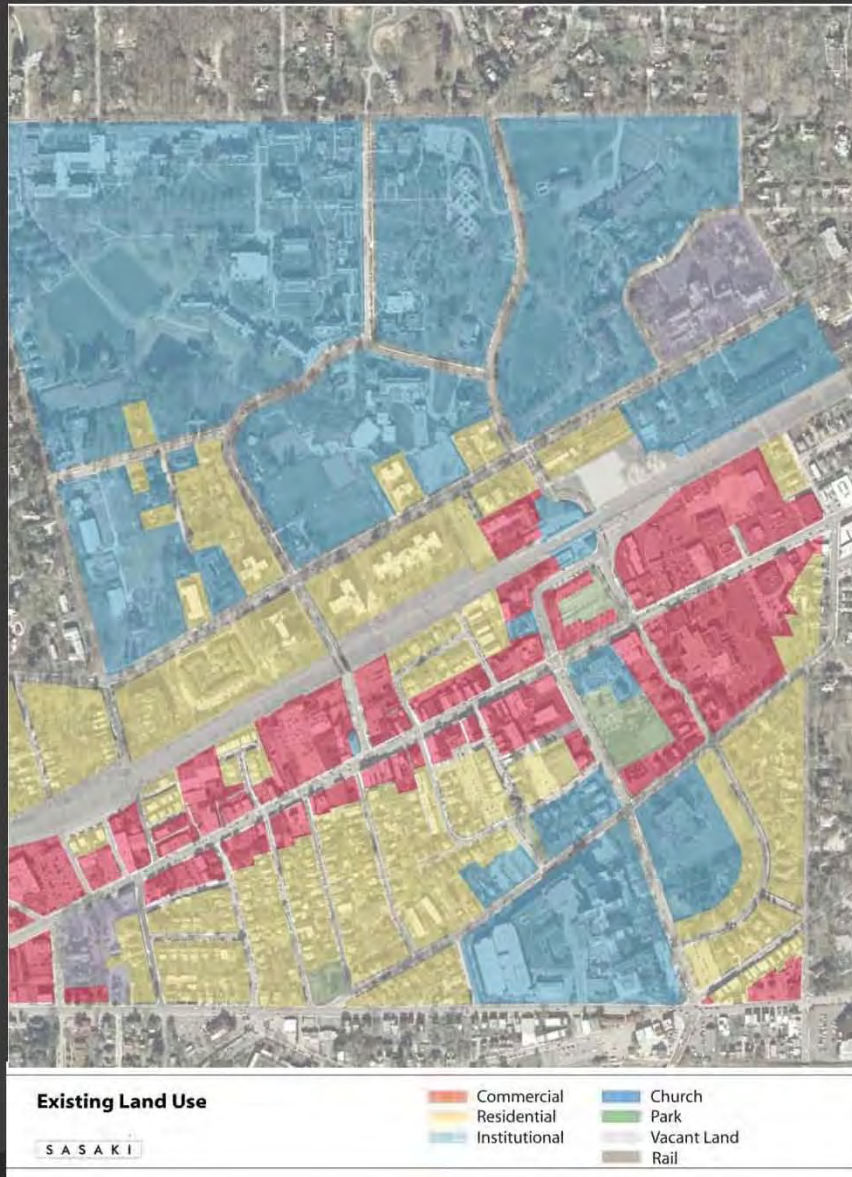
1. Maintain village character
2. Traffic impacts addressed
3. Density added only in appropriate places (i.e. around station)
4. Ad Hoc Committee support



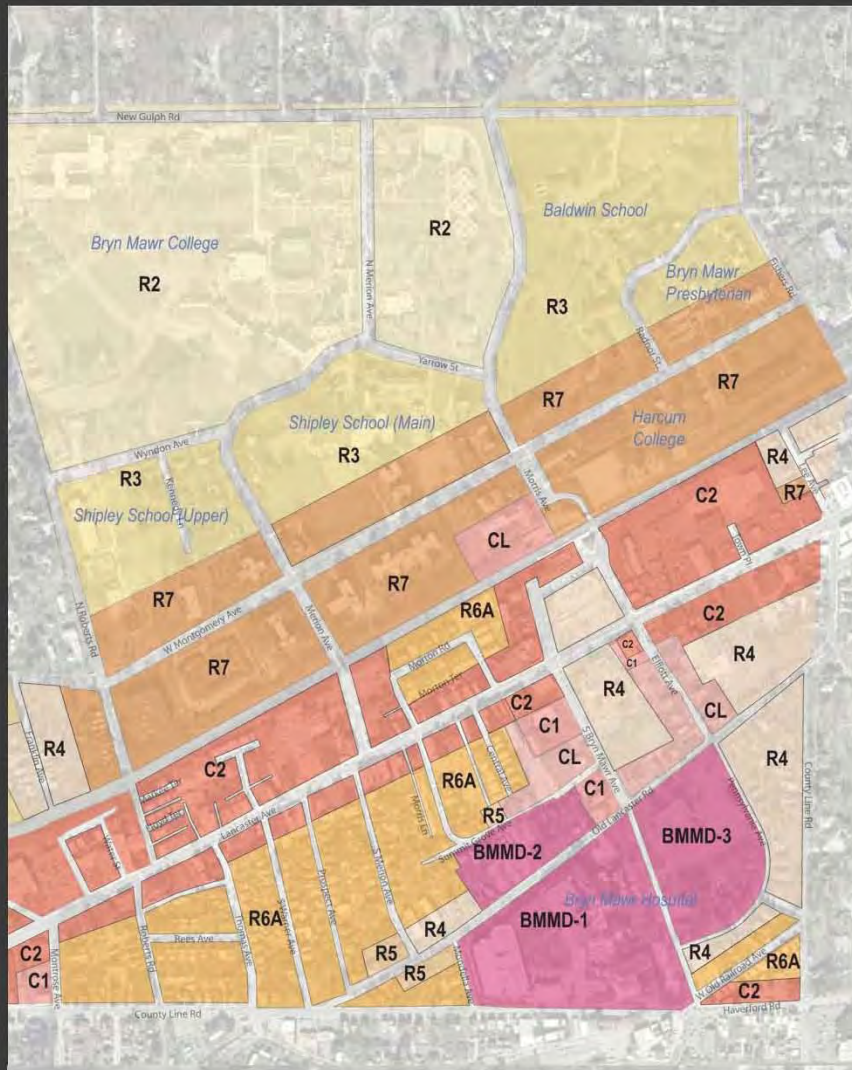
# VILLAGE DISTRICT ZONING

1. Zoning Map
2. Intent
3. Uses
4. General Requirements (parking and service)
5. Development Standards (density and form)
6. Bonus Provisions
7. Design Standards

# 1. ZONING MAP

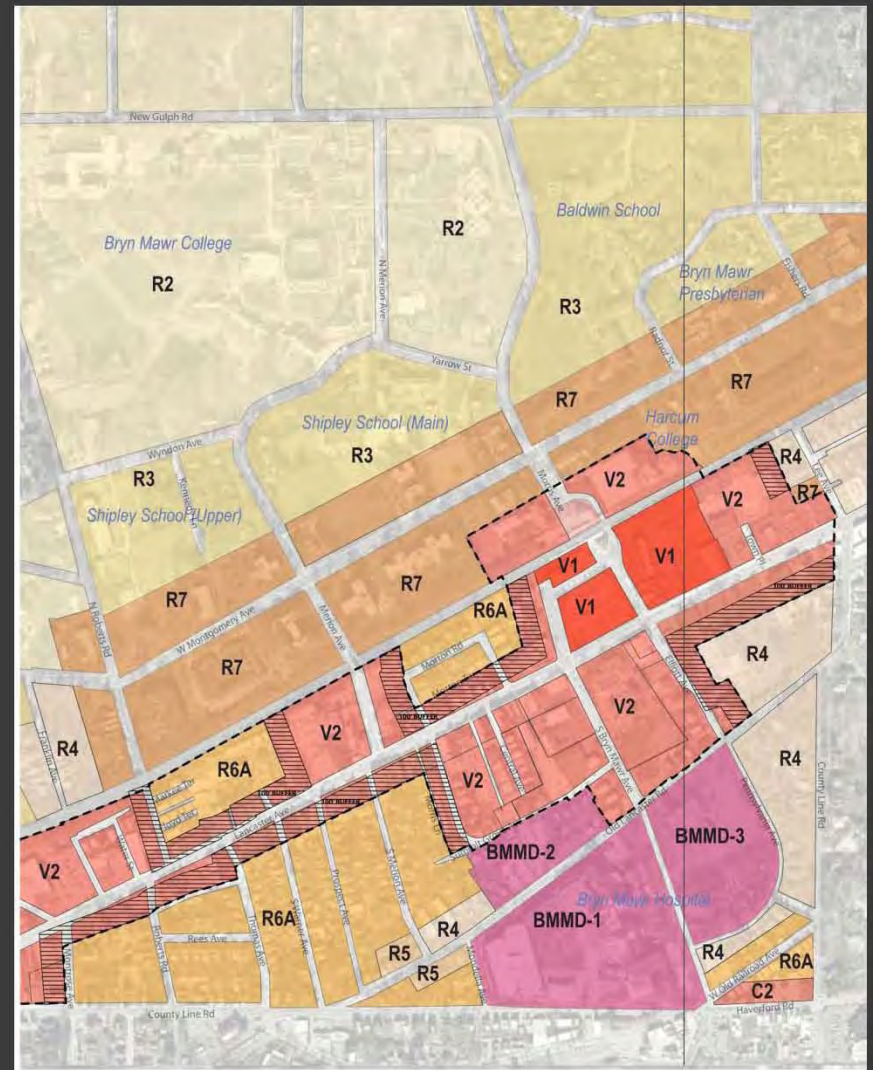


# 1. ZONING MAP



**Existing Zoning**

SASAKI



**Proposed Zoning**

SASAKI

# DEVELOPMENT STUDIES: LOT 7-A



# DEVELOPMENT STUDIES: LOT 7-A



- street wall 3 stories
- max height 8 stories
- stepback 10-15 feet
- building setback 0 feet
- development area 224,000 gsf
- FAR 2.5



Lancaster Avenue eastbound



Lancaster Avenue westbound

# DEVELOPMENT STUDIES: LOT 7-B



ZONING WORKSHOP JULY 07

ERA

SASAKI

# DEVELOPMENT STUDIES: LOT 7-B



- street wall 3 stories
- max height 8 stories
- stepback 10-15 feet
- building setback 0 feet
- development area 240,000 gsf
- FAR 2.6



Lancaster Avenue eastbound



Lancaster Avenue westbound

# DEVELOPMENT STUDIES: LOT 7-C



ZONING WORKSHOP JULY 07

ERA

SASAKI



# DEVELOPMENT STUDIES: LOT 7-C



- street wall 3 stories
- max height 8 stories
- stepback 10-15 feet
- building setback 0-5 feet
- development area 210,000 gsf
- FAR 2.4



Lancaster Avenue eastbound



Lancaster Avenue westbound

# DEVELOPMENT STUDIES: VERIZON



ZONING WORKSHOP JULY 07

ERA

SASAKI

# DEVELOPMENT STUDIES: VERIZON



- street wall 3 stories
- max height 4 stories
- stepback 10 feet
- building setback 0 feet
- development area 178,000 gsf
- public parking 200 cars
- FAR 1.2



Lancaster Avenue eastbound



View over railroad

## NEXT STEPS

- Refine text to draft Village zoning ordinance
- Bryn Mawr Civic Association, Zoning                      September 17
- Ad Hoc Committee, Traffic                                      September 20
- Community Meeting, TRID/Zoning                      September 26



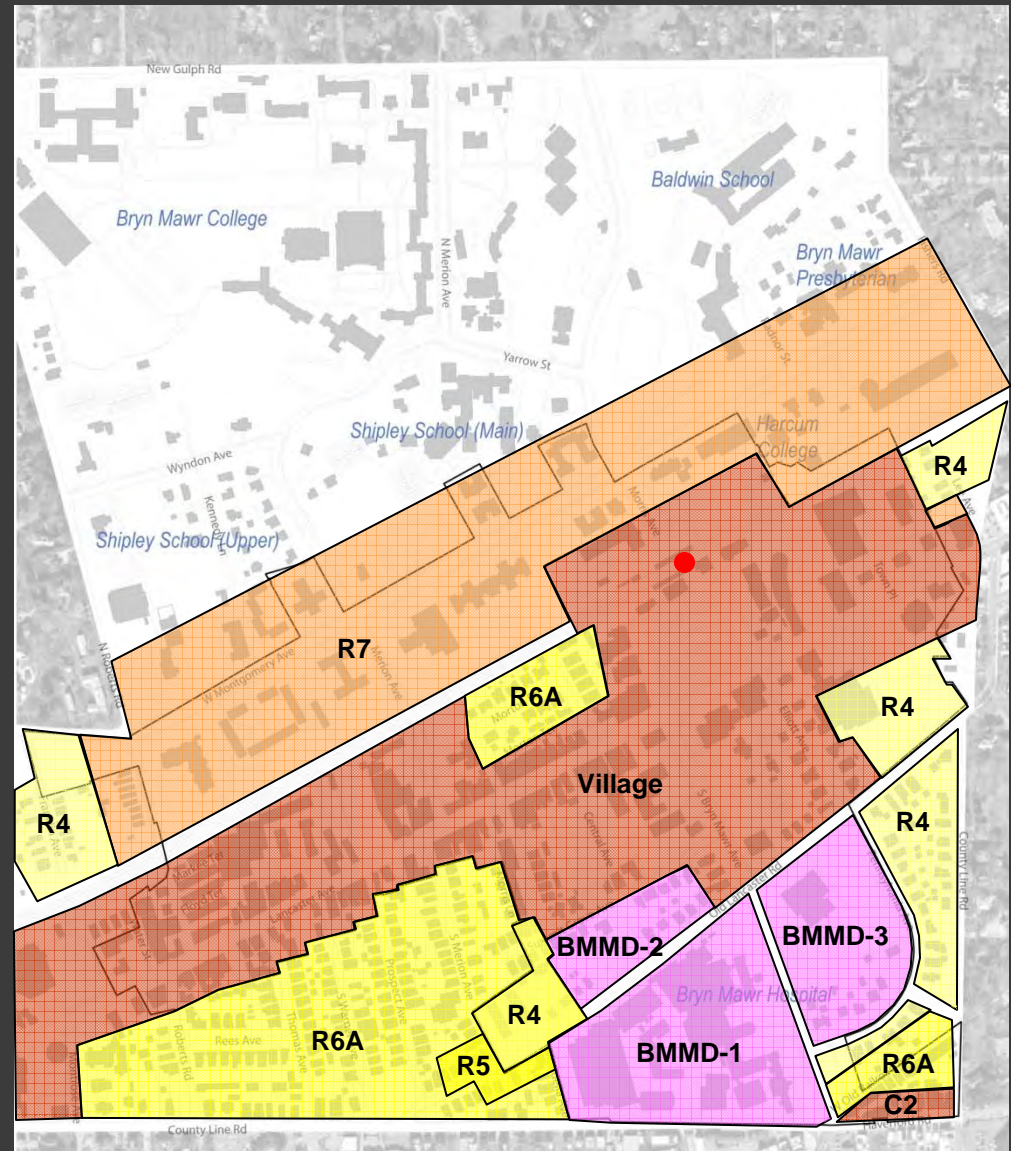


# Criteria for Successful TRID Agreement

1. No eminent domain
2. Ad Hoc Committee support
3. No single purpose residential neighborhoods within boundary
4. Money generated must be worth new financial structure
5. Ability to finance projects the Village wants and needs: train station improvements, parking decks, streetscape
6. Satisfactory definition of "transportation purpose"
7. Town definition of SEPTA-related benefits within the district (eg. train station improvements)
8. Ability to change Lot 7

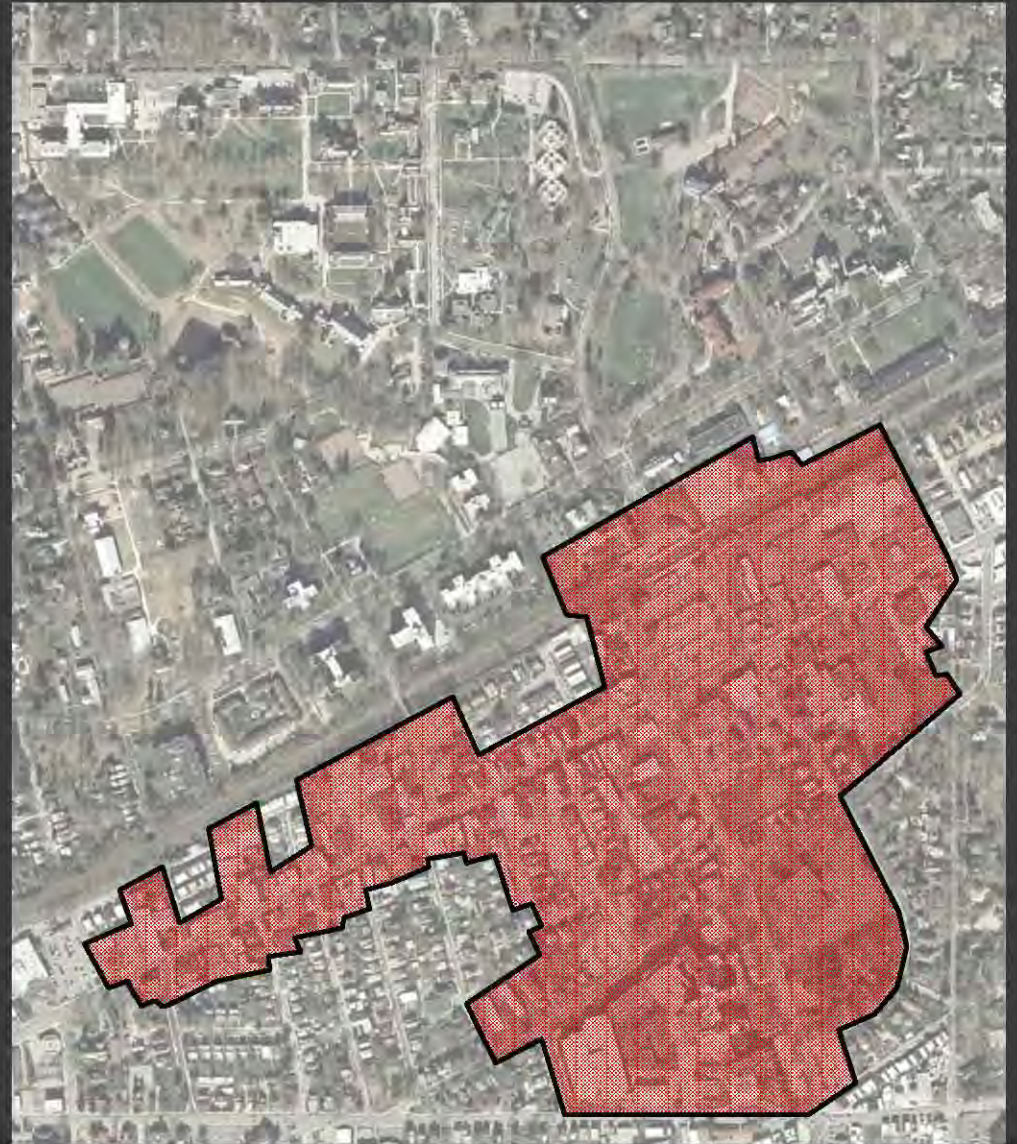
# ZONING CONCEPTS

- Create a coherent village district on underlying commercial zones with form-based zoning
- Retain medical zones
- Retain residential neighborhoods
- Institutional shared parking





# TRID BOUNDARY UPDATE

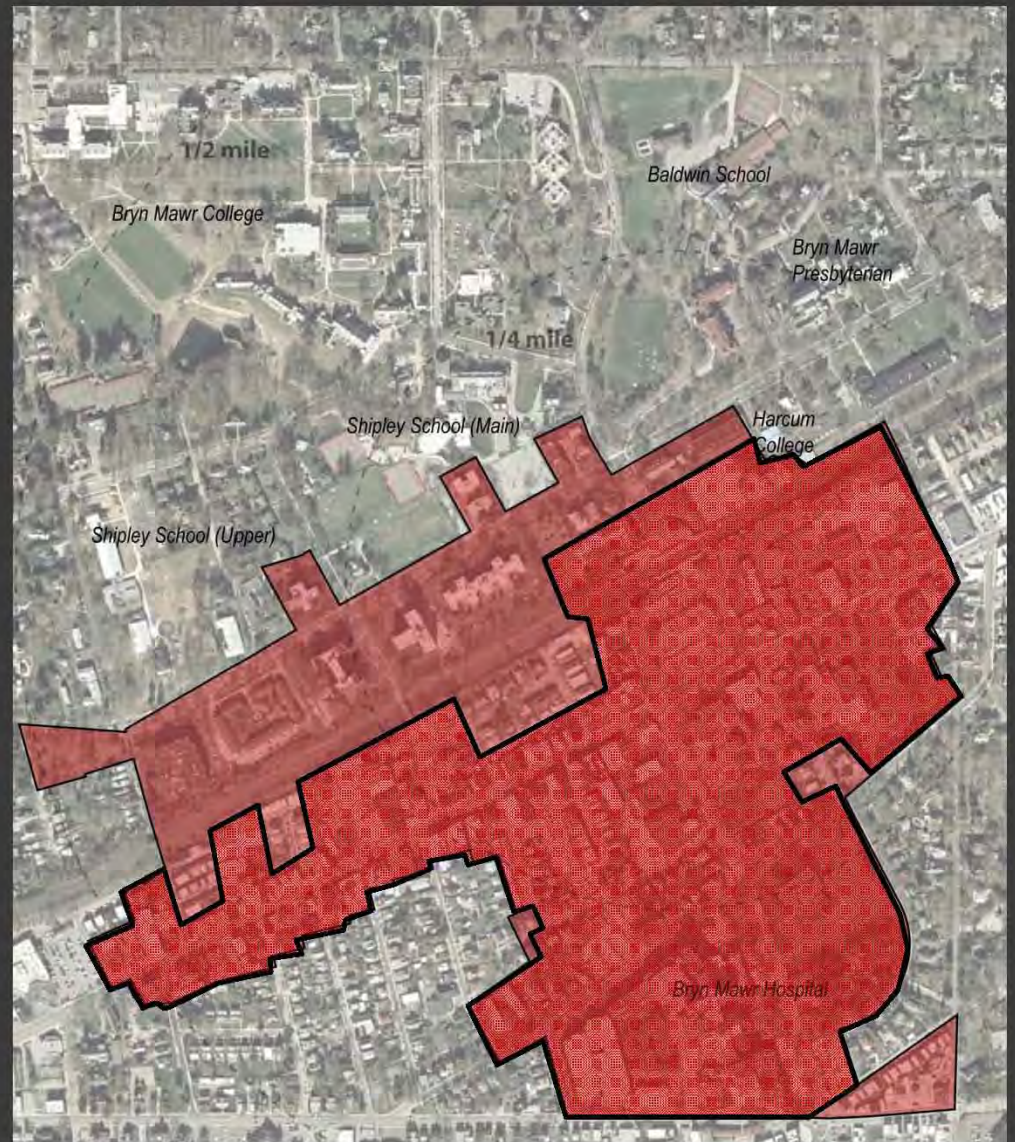


ZONING WORKSHOP JULY 07

ERA **SASAKI**

# TRID BOUNDARY - COMPARISON

- Comparison between initial TRID boundary and update



TOWNSHIP OF LOWER MERION

Ad Hoc Bryn Mawr Committee

Thursday, July 19, 2007 at 4:00 PM

Zoning Workshop Notes

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Charles Bloom  
Vincent DiCioccio  
Mike Fanning  
Jo Ann Magnetta  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

**Guests:**

Kathryn Madden, Sasaki Associates  
Susan Gibbons, Gannett Fleming  
Richard Bickel, DVRPC  
Brian O'Leary, Montgomery County Planning Commission  
Anne Leavitt-Gruberger, Montgomery County Planning Commission

**Staff in Attendance:**

Pat Ryan  
Angela Murray  
Eric Persson  
Bob Duncan

1. Report from the Chairman

Commissioner Scott Zelov thanked everyone for coming to the meeting at 4:00 PM. He reported that new parking directional signs are being installed in Bryn Mawr. The locations have been prepared with bases installed. These are covered with plastic orange cones to prevent tripping hazards until final sign installation.

Scott made note of a draft report provided to the Township for comment by DVRPC, Increasing Internodal Access to Transit Phase IV. The report focuses on five stations including the Bryn Mawr R5 Septa station and evaluates Level of Service (LOS) for pedestrian and bicycle access. Bryn Mawr was found to have a 6.17 ratio of weekday boardings to occupied parking stalls. This is a remarkable statistic that demonstrates the high number of people walking and biking to the station. The report evaluates the physical area one-quarter mile from the station showing better pedestrian access than bicycle access. Recommended improvements include dedicated bikeways along key routes, crosswalk and intersection and pedestrian overpass/underpass improvements.

The Commissioner joined Kathryn, Sue Gibbons and staff today to review the proposed zoning concepts. Kathryn began the presentation noting that she had taken all the suggestions from the last workshop and made some changes including adding density in the appropriate places. The handout is the beginning of the memorandum that would form the basis of the future zoning code for Bryn Mawr. The format includes the proposed zoning map, intent, uses, general requirements, development standards, bonus provisions and design standards.

The existing and proposed zoning maps were reviewed. Kathryn recommends that the area around Markee and Floyd Terrace be rezoned from commercial to residential (R6A) to recognize existing neighborhood rather than individual homes. The Village zoning has been expanded to two levels of use, the V1 with higher density around the station and the V2 which would be everything else. There was internal debate about establishing a V3 or V2A for areas that are currently R6A and R4 where there would be less height preventing visual impacts. This would be a check on keeping the commercial corridor where it is today and not allowing it to extend into residential areas. The depth of existing commercial lots will need to be evaluated.

The intent is exactly as it has been for the previous workshops. The allowable uses establish what we are trying to achieve in the village zone with residential as a primary use, uses that should be located on side streets and upper floors, conditional uses and prohibited uses. The concept of separation of certain uses was discussed and limitation based on blocks or linear feet based on a block calculation will be studied further.

General requirements were reviewed for different uses. These include applying stricter standards to historic structures including those on the Township's Class 1 and 2 inventories and the National Register of Historic Districts. There may need to be separate standards on what can and cannot be demolished since there is not a formal historic district designation in the Bryn Mawr commercial district while there are National Register buildings such as the Bryn Mawr Film Institute.

The requirements for parking replicated but are simplified from the Montgomery County Model Ordinance. Sasaki reviewed case studies on Reston, Alexandria and Arlington, Virginia, which are all town centers and other than Reston, Transit Oriented Developments. In these districts, three or four spaces per thousand were typical. Small shops that don't need parking would be exempt as in the MUST. The question of residential above commercial was raised. Shared parking works well for that, but adjustments are needed to differentiate structured from surface.

Valet parking is something that has been requested by retailers recently and Bob Duncan explained that it is allowed. However, the difficulty has been in implementation since there is no where for valets to take the cars off-site with limited parking available. Kathryn explained that the parking graphs were taken from both the Urban Land Institute and the Montgomery County Model Ordinance and tested on Lot 7. At different times of the day, parking is reduced generally to 80% of what is needed. Bob Duncan offered to have planning staff review the graphs and provide the consultants and committee with an analysis. Service related issues that are included include location of trash receptacles, storage of refuse, location of mechanicals and electrical equipment and screening of equipment viewable from roofs.

Development Standards include minimum lot size and height although there was a question about the 25 foot width since many stores are smaller. Other important standards include encouraging any new structures to be built to the build-to line, no side yard requirements for shared building walls and maximum impervious surface to encourage a tight and walkable urban district.

In the V1, if the bonus provisions were utilized, the maximum height allowed would be eight stories. The V2 shown on the zoning map consists of two areas, one for the Main Street Zone (hatched area on map) and the other for the Neighborhood Zone. There was discussion about one of the areas becoming a V2A or V3 to indicate where this becomes the buffer area for where the commercial meets the residential. The height limit for V2 would be five stories. However, for the Main Street district, three stories were suggested to be more appropriate. The concern is that we create zones that are economically feasible to be redeveloped in the future. The Village area should marry a variety of uses that work together to form a whole.

Kathryn next reviewed three development massing studies for Lot 7 and one for the Verizon Lot that were requested at the previous workshop. These showed various ways of developing the areas based on different intensities of Floor Area Ratio (FAR) and the impact of various build-out, step-back and open space configurations for each. Utilizing the suggested Bonus Provisions, Kathryn described how the use of certain provisions would affect the height of new structures. The Bonus Provisions reflect civic goals established during the Master Plan process and include proximity to transit, affordable housing, open space, protection for historic structures and underground parking. A suggestion was made to add "Leadership in Energy and Environmental Design" (LEED) certified structures as a bonus provision.

Design, green space and signage standards were the final area for discussion. These include areas such as building character and orientation, entrances, sidewalks, transparency, roofs, roof articulation, etc. Kathryn is most comfortable with language that directs how good design should be achieved rather than specifying materials. We could consider tying design and green space standards as required for the use of bonus provisions as well. Concerns were expressed that we might prefer to have more specificity particularly as it relates to materials similar to the MUST. Another concern was expressed that we not limit architectural creativity with too many limitations.

Kathryn explained that the handout is a baseline template and that each committee member should review and provide comments via Angela Murray. Another draft will be provided in advance of the next meeting so that comments can be incorporated into the community presentation.

The schedule going forward is as follows:

- Monday, September 17, 2007, 7:00 PM Bryn Mawr Civic Association Meeting- presentation of Zoning concepts
- Thursday, September 20, 2007, 5:00-7:00 PM Ad Hoc Bryn Mawr Committee Meeting- presentation of traffic findings by Gannett Fleming
- Wednesday, September 26, 2007, 7:00 PM Public Meeting in Township Board Room Bryn Mawr TRID and Zoning Presentation

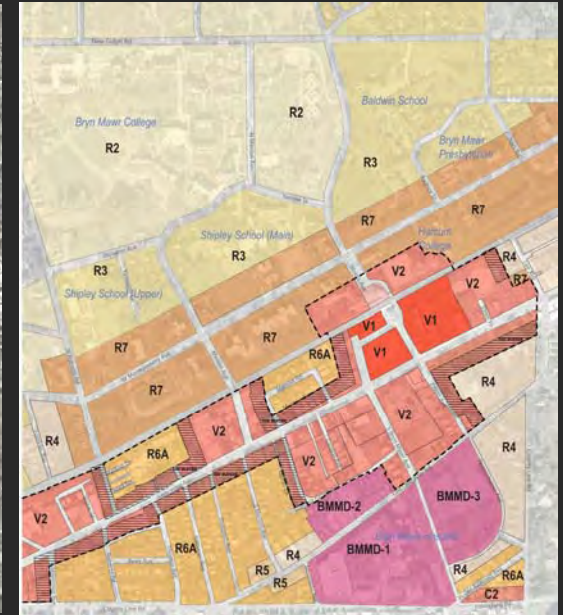
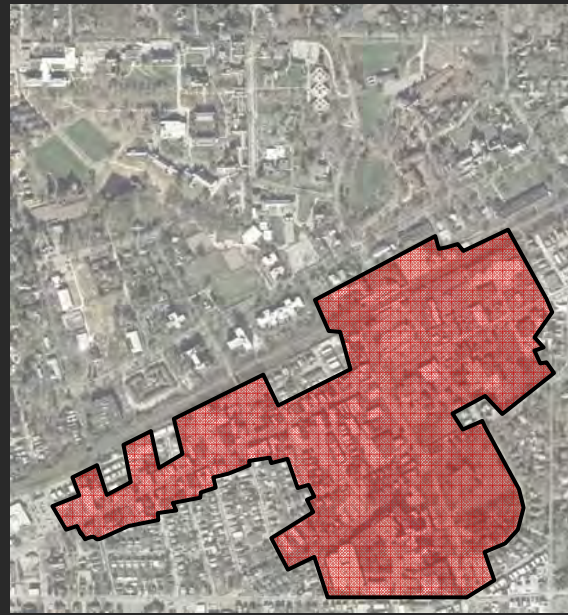
A question was raised about when another presentation would be made to the Bryn Mawr Business Association. It was suggested that members be notified of the Civic Association meeting as well as the public meeting. Since this is the beginning of the focus on the Bryn Mawr Village Center, there should be much interest in learning about the changes.

Charlie Bloom noted how long it had been since Board President Joe Manko had appointed this committee and it was good to see that real progress was finally being made. Hank Wilson is concerned with difficulties with trying to pass new zoning given the three residents remaining in the Central Avenue area. Scott encouraged everyone to review the handout and provide comments to Angela Murray for review.

# Bryn Mawr Master Plan / TRID STUDY

## Z O N I N G PRESENTATION

Bryn Mawr Civic Association September 17, 2007



# OVERVIEW

Zoning Workshops held with Ad Hoc Committee - April, June and July 2007

- Zoning models researched: Montgomery County Model Ordinance, Form-Based, New Urbanism, Lower Merion Code
- Identified concepts based on Master Plan
- Tested form

## Criteria for Successful Zoning

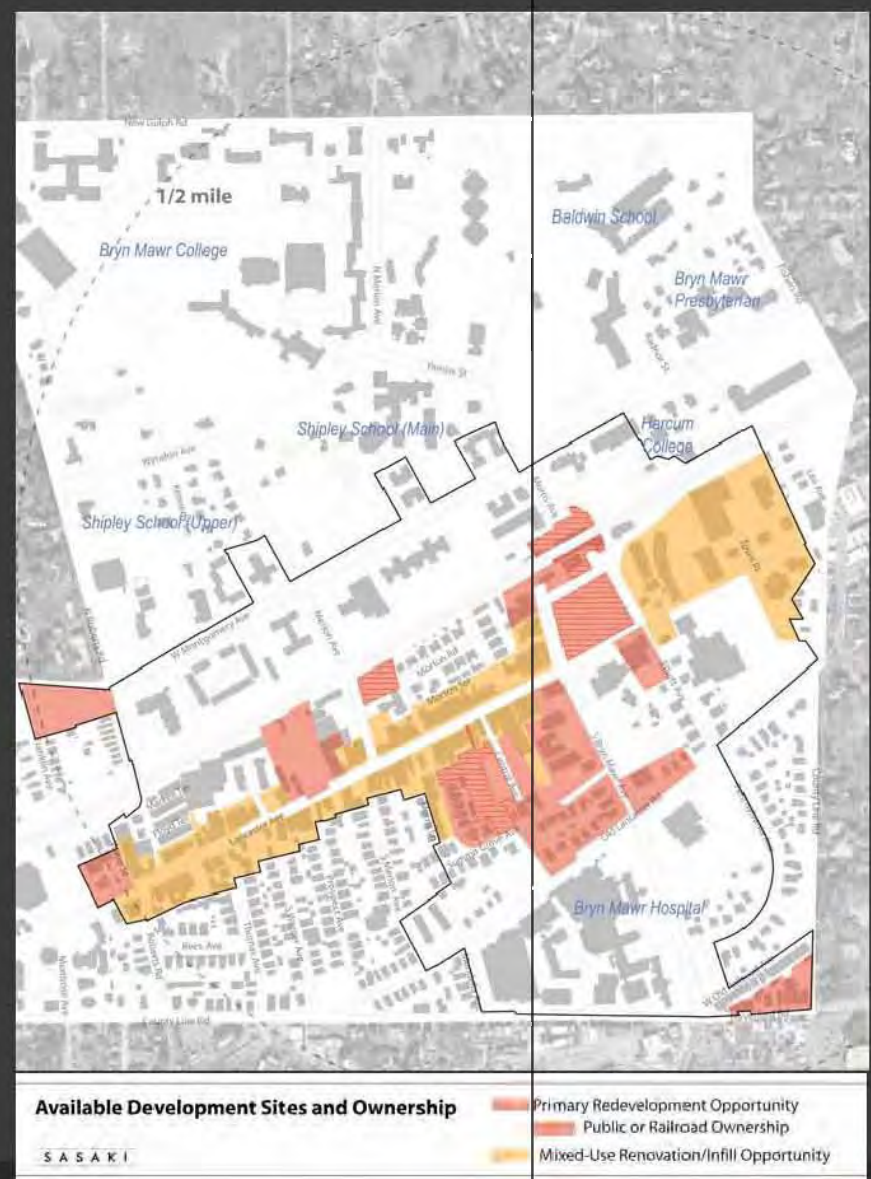
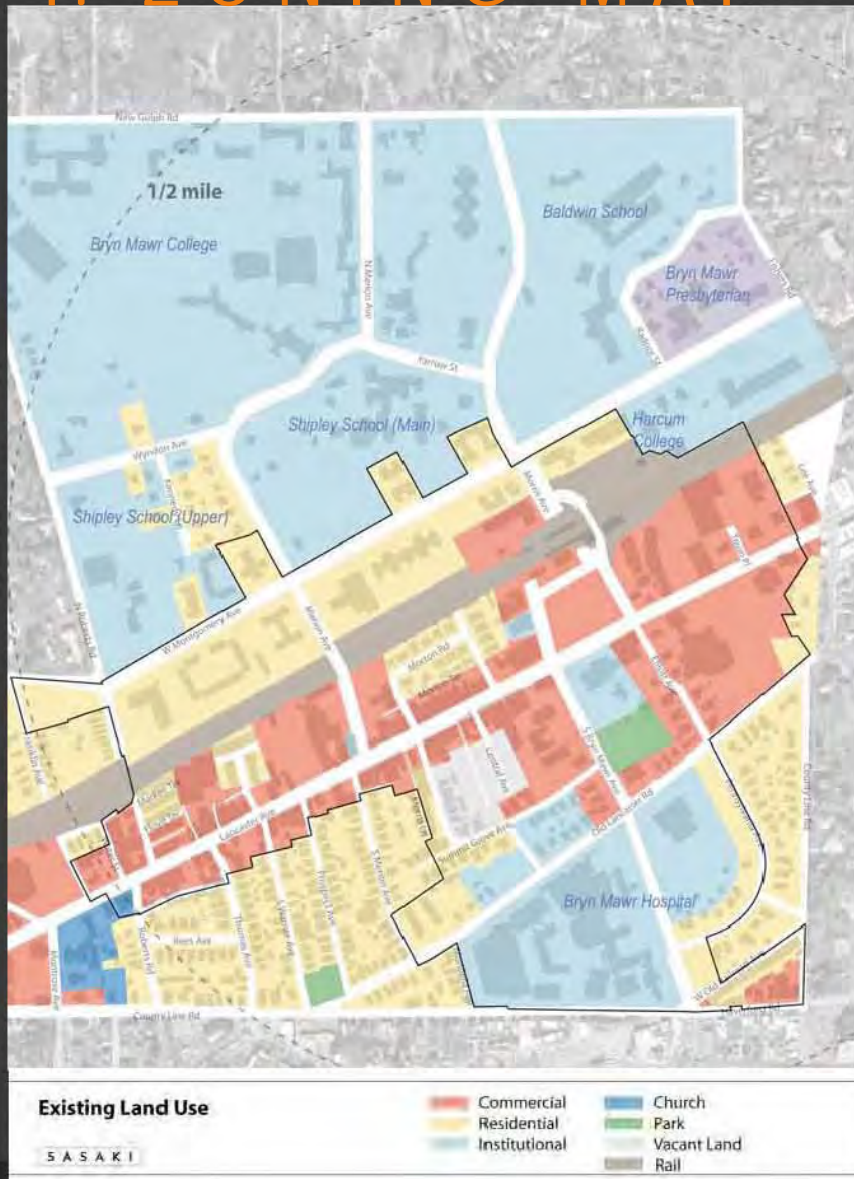
1. Maintain village character
2. Density added only in appropriate places (i.e. around station)
3. Traffic impacts addressed
4. Ad Hoc Committee support

# VILLAGE DISTRICT ZONING

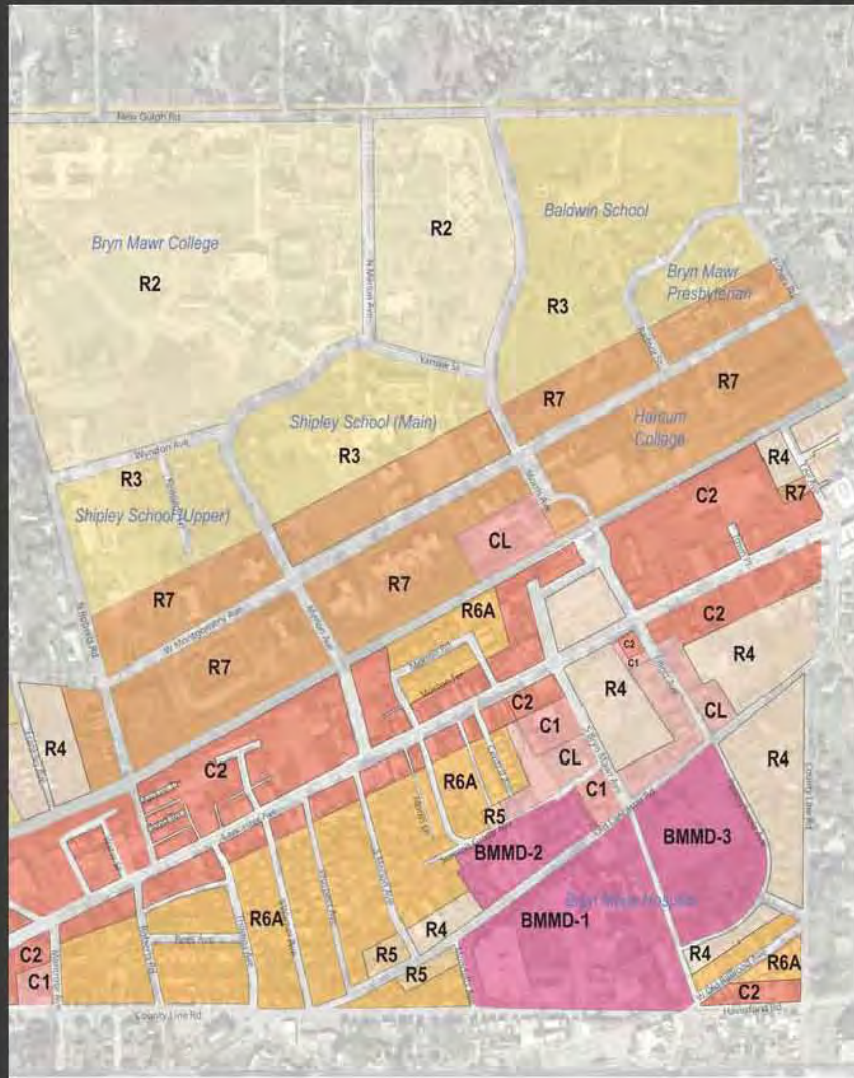
1. Zoning Map
2. Purpose
3. Use Regulations
4. Dimensional Standards for Development (density and form)
5. General Requirements
  - historic structures, parking and service
6. Bonus Provisions
7. Development Design Standards
8. Signage, Awnings & Canopies



# 1. ZONING MAP

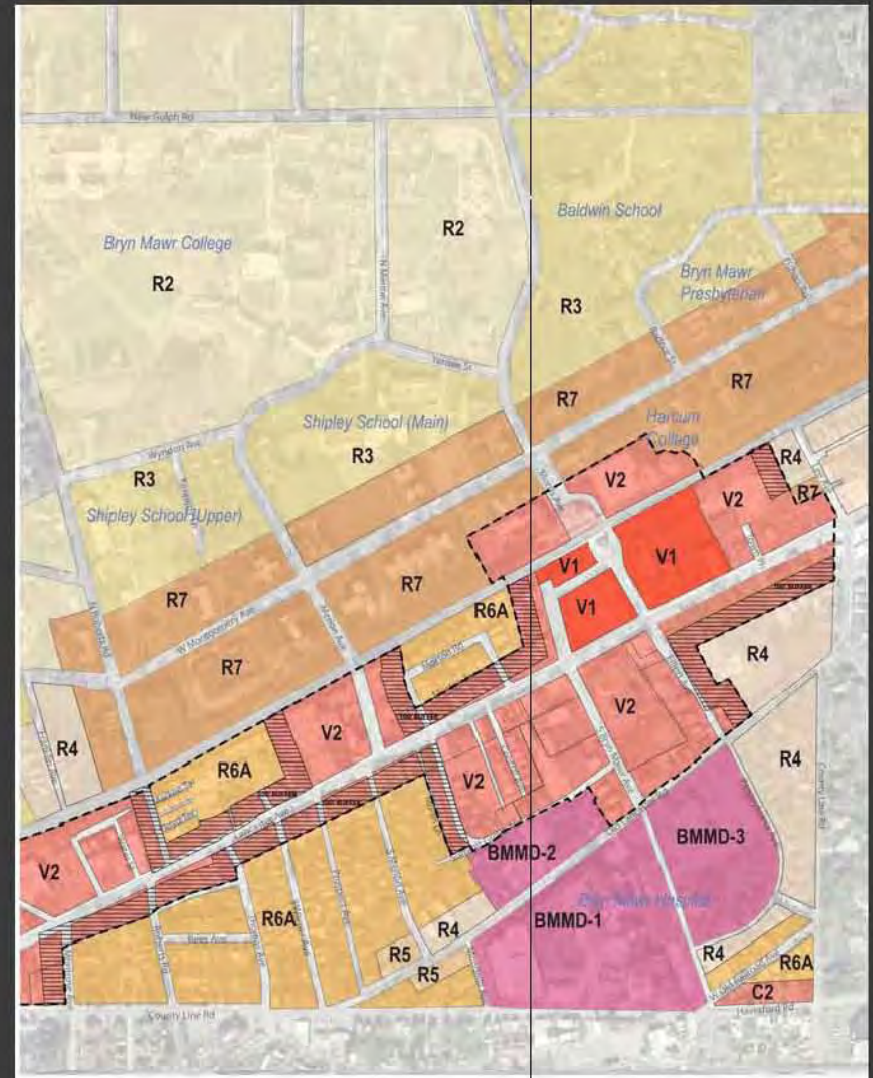


# 1. ZONING MAP



Existing Zoning

SASAKI



Proposed Zoning

SASAKI

## 2 . PURPOSE

- a. Promote Transit Oriented Development and encourage economic development; maintain the traditional main street environment
- b. Protect existing residential neighborhoods
- c. Establish a walkable communities by promoting pedestrian friendly streets and buildings
- d. Encourage lively, human-scaled activities with a mix of residential, commercial, cultural and other uses
- e. Encourage active ground floor retail, not service uses to ensure a vibrant street life
- f. Promote the reuse of existing structures to maintain historic and visual character and architectural scale
- g. Reduce auto dependency by promoting transit ridership
- h. Accommodate parking in a convenient and unobtrusive manner and encourage shared parking

### 3 . USES : ALLOWABLE

- Small scale retail, excluding drive-through facilities, and including variety/general merchandise,
- Restaurants, cafes, and other food retail including tavern, bakery, ice cream shop (walk up window but no drive-through)
- Galleries and museums
- Theater, including motion pictures and stage plays; music venues
- Inns, bed and breakfast
- Hotels
- Transit facilities
- Public park/Plaza/Public Gathering Space
- Farmers markets
- Private clubs and fraternal organizations
- Residential with 80% of the first floor along primary streets dedicated to retail uses
- Residential on side streets and on the second floor and above

### 3 . U S E S : Secondary & Tertiary Streets

Permitted uses on ground and upper floors of secondary streets (Bryn Mawr Avenue) and on the ground floor of primary streets (Lancaster Avenue) if separated by 300 feet:

- Business office, such as real estate sales, travel agency, advertising, etc.
- Professional office, such as medical practices, law, engineering, architecture, or accounting
- Personal services shop, such as tailor, barber, salon, shoemaker, dressmaker, dry cleaner (without cleaning operations on site), excludes massage parlors
- Bank or loan institution without drive-through facilities
- Dance, music, fitness, or art studios
- Residential above retail on Primary Street
- Residential

### 3. USES: CONDITIONAL

- Religious institution and ancillary uses
- Government administration/public utility offices (e.g. post office, library)
- Funeral homes
- Uses determined by Board of Commissioners to be of a similar nature to those listed above

## 3. USES: PROHIBITED

- Automobile or other vehicle or tire sales, or repair establishments (including vehicle body repair, painting, or car washing)
- Gas station
- Drive-through facility or window
- Fast food restaurants
- Self-service storage (mini-warehouse)
- Adult entertainment
- Check cashing
- Tattoo establishments
- Any other use not permitted in the district
- Uses determined by the Board of Commissioners to be similar to those listed above

## 4 . DEVELOPMENT STANDARDS

1. Minimum Lot Size: 2,500 square feet
2. Minimum Lot Width: 25 feet
3. Build-to-Line
  - Build to the right-of-way line
  - Setback from the sidewalk 10-30 feet for purposes of a plaza, square, courtyard, recessed entrance or outdoor dining
4. Side Yard Setback
  - No side yard setback for buildings that share a party wall
  - When no party wall, setback between buildings 10 feet
5. Maximum Impervious Coverage
  - 100%



## 4 . DEVELOPMENT STANDARDS

6. Building Height
  - Minimum of two stories
  - Maximum of five stories (65 feet) if a 10 foot step back is provided after the third story
  - Maximum of four stories (40 feet) if located within 100 feet of R-4 or R6A zone (Village Buffer) if 10 foot step back after third story
  - Step back measured from build-to-line
  - Bonus provisions for conditions when greater height is allowed
7. Maximum Building Footprint (single use, nonresidential)
  - 12,000 square feet
8. Floor Area Ratio: The numerical value obtained by dividing the gross floor area of a building by the area of the lot on which it is constructed.
  - 1.8
  - Bonus provisions for conditions when greater FAR is allowed

## 4. DEVELOPMENT STANDARDS: HISTORIC STRUCTURES

### National Register Historic buildings or Township Historic Resource

In order for an Historic Structure to be demolished:

- Structurally unsound and cannot be stabilized as determined by a professional structural engineer specializing in historic structures; and
- The Township and Lower Merion Historical Commission (LMHC) has been notified of the intent of demolition.

Replacement buildings must meet the following conditions

- Be constructed with materials similar to those in Bryn Mawr buildings
- Provide a significant public amenity (urban garden, public plaza, or mid-block pedestrian passage, etc.)
- Meet the Village Development Design Standards.

## 4. BONUS PROVISIONS

Accumulate up to two to a maximum of 2.5 FAR, with additional step backs on height

- Affordable or Workforce Housing
  - FAR increase 0.2 if 5 dwelling units or 20% of total units are affordable or workforce units
- Public Gathering Space
  - FAR increase 0.2 if 10% of total lot area is dedicated contiguous Public Gathering Space (minimum 1,000 square feet)
- Green Roof or Structure
- On-Site Shared Parking-Minimum additional 20% of required
  - FAR increase 0.2
- Underground Parking
  - FAR increase 0.2

## 5. P A R K I N G & SERVICE REQUIREMENTS

### Single Use Parking

- Parking is not required for commercial or mixed-use buildings on a lot 3,000 square feet or smaller that has 30 feet or less road frontage.
- Reduction if shared parking requirements are met and the use is located within 1000 feet of a public parking facility or transit facility.

### Parking Ratios

- Residential                      1.5 per unit
- Office                              4 per 1000 sf
- Retail                              4 per 1000 sf
- Hotel                              1 per room
- Restaurant                      5 per 1000 sf
- Theater                          1 per 5 seats
- Fitness center                  5 per 1000 sf

# 5. P A R K I N G & SERVICE REQUIREMENTS

## Surface Parking

1. Surface parking and exterior loading areas located between the structure and rear lot line.
2. On a corner lot, if parking and loading cannot be behind the buildings and screened from view, then the parking is located along the street with the least amount of commercial activity or with the least amount of pedestrian activity.
3. Parking
4. visible from the street should be screened by a fence, wall, or plantings two to three feet in height.
5. Pedestrian access to and through a surface parking lot must be connected to pedestrian walkways, safely provided and well-lit.

## 5. P A R K I N G & SERVICE REQUIREMENTS

5. Off-street surface parking shall not extend more than seventy feet (70) in width along any pedestrian street frontage without an outdoor café, landscaped garden or public plaza with seating.
6. Parking and exterior loading areas shall be buffered from any adjacent pedestrian way by planting street trees and providing a six (6) feet wide landscaped area with a continuous row of two (2) feet high shrubs, or a fence or seating wall not less than two (2) feet and no more than 3 feet high. Shrubs shall be maintained at a height of two (2) to three (3) feet.
7. Surface parking will not be considered the same as Public Gathering Space, plaza or park.

# 5. P A R K I N G & SERVICE REQUIREMENTS

## Parking Structures

1. Parking Structures shall be internal to the block, or placed underground, or fronted or wrapped with retail or residential uses.
2. Where the dimensions of the lot prevent wrapping or where a Parking Structure supports a Transit Facility, then ground floor retail shall be provided if feasible.
2. Sloping floors and bare slabs shall not be visible from a primary street.
3. Vehicular access to parking structures shall be from side streets or alleys where possible.
4. Front facades of parking structures visible from a street or pedestrian way shall be pedestrian oriented and scaled

## 5. P A R K I N G & SERVICE REQUIREMENTS

### Shared Parking for Mixed-Use Buildings

1. Reduction permitted if shared parking requirements are met and the use is located within 1000 feet of a public parking facility or transit facility and on-street parking is available.
2. For mixed-use, calculations for shared parking can be applied to determine the minimum of parking required.
3. The Source of Peak Demand Percentages for purposes of calculation is based on the Urban Land Institute's Shared Parking Standards.



## 4. PARKING & SERVICE REQUIREMENTS

### Service Requirements

- Areas used for loading or trash receptacle purposes shall not be adjacent to residential uses and residential zoning districts. If these areas must be located adjacent to residential uses or zoning districts then they shall be screened from view. Noise, sound and odors associated with these uses shall not be discernable at the lot line.
- The storage of refuse shall be provided inside the building or within an outdoor area enclosed by either walls or opaque fencing. Any refuse area outside of the building shall be designed to be architecturally compatible with the building, shall not be located in the front of the building, and be entirely screened by a fence or enclosure that is at least six feet high.

## 4. PARKING & SERVICE REQUIREMENTS

3. All wall-mounted mechanical, electrical, communication, and service equipment, including satellite dishes and vent pipes shall be screened from public view by parapets, walls, fences, landscaping, or other approved means.
4. All rooftop mechanical equipment and other appurtenances shall be concealed by or integrated within the roof form or screened from view at ground level of nearby streets.
5. The following, when above the roofline, requires screening: stair wells, elevator shafts, air conditioning units, large vents, heat pumps, and mechanical equipment.

# DEVELOPMENT STUDIES: LOT 7-A



ZONING PRESENTATION September 17, 2007  
Bryn Mawr Civic Association  
September 17, 2007

ERA

SASAKI

# DEVELOPMENT STUDIES: LOT 7 - A



- street level 4 stories
- upper level 0 stories
- step back 0 feet
- building setback 0-5 feet
- development area 200,000 gsf
- FAR 2.2



# DEVELOPMENT STUDIES: LOT 7-B



ZONING PRESENTATION September 17, 2007  
Bryn Mawr Civic Association  
September 17, 2007

ERA

SASAKI

# DEVELOPMENT STUDIES: LOT 7-B



- street level 3 stories
- upper level 0 stories
- Step back 0 feet
- building setback 0-5 feet
- development area 155,000 gsf
- FAR 1.7



# DEVELOPMENT STUDIES: LOT 7-C



ZONING PRESENTATION September 17, 2007  
Bryn Mawr Civic Association  
September 17, 2007

ERA

SASAKI

# DEVELOPMENT STUDIES: LOT 7-C



- street level 3 stories
- upper level 3 stories
- step back 10 feet
- building setback 0-5 feet
- development area 220,000 gsf
- FAR 2.5





# DEVELOPMENT STUDIES: VERIZON



ZONING PRESENTATION September 17, 2007  
Bryn Mawr Civic Association  
September 17, 2007

ERA

SASAKI

# DEVELOPMENT STUDIES: VERIZON



- street level 3 stories
- upper level 3 stories
- step back 10 feet
- building setback 0-5 feet
- development area 220,000 gsf
- FAR 2.5



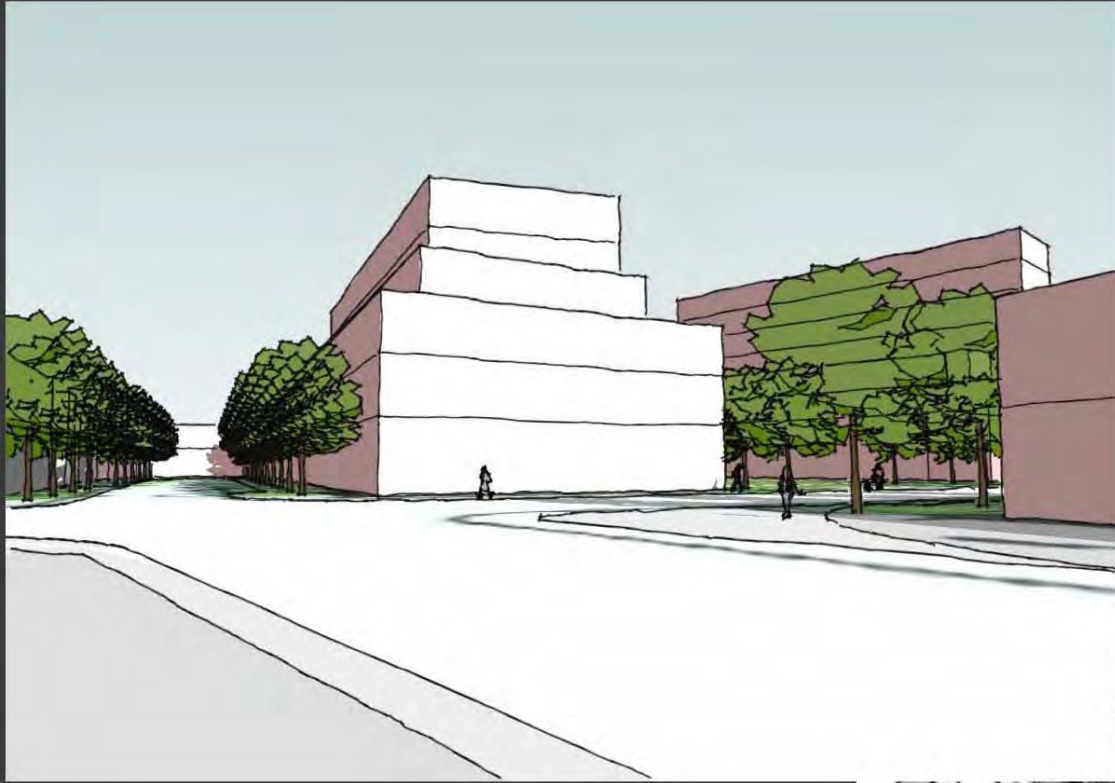
## 6 . DEVELOPMENT DESIGN STANDARDS

- Design Standards
  - Promote Village Character and Pedestrian Oriented Design
  - Façade Articulation & Composition
  - Materials
  - Entrances
  - Transparency
  - Architectural Rhythm
- Architectural Design Standards
  - Windows & Doors
  - Exterior Walls
  - Roofs
  - Public Walkways
- Streetscape & Green Area Standards
  - Street Trees
  - Urban Gardens
  - Public Plazas, Squares, Courtyards
- Signs, Awnings & Canopies

# NEXT STEPS

- Community Meeting September 26, 2007  
Board Room  
Township Administration Building

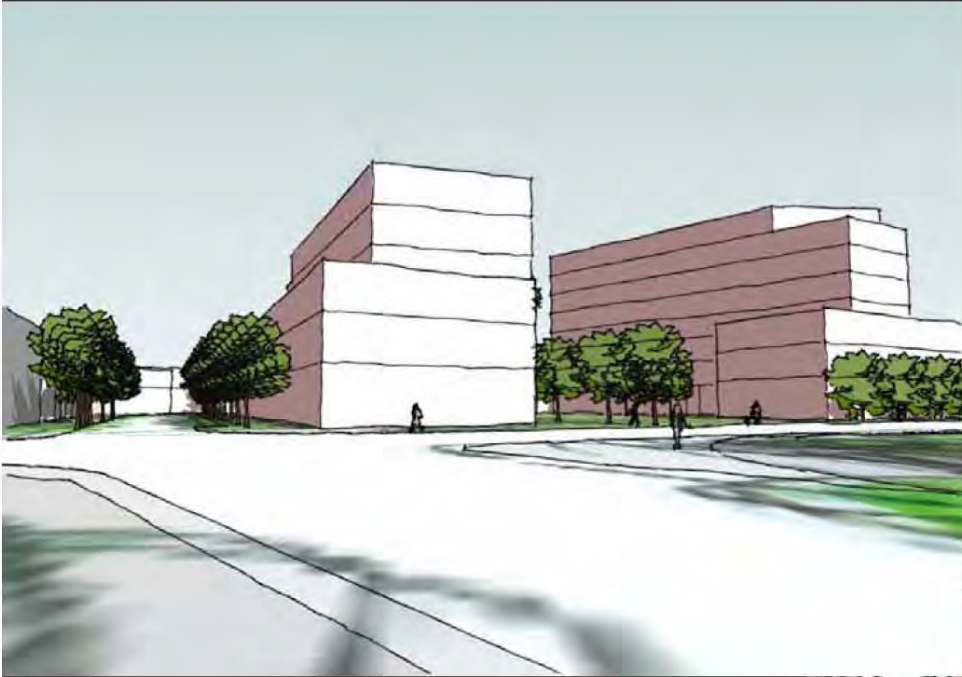
# DEVELOPMENT STUDIES: LOT 7-A



ZONING PRESENTATION September 17, 2007  
Bryn Mawr Civic Association  
September 17, 2007

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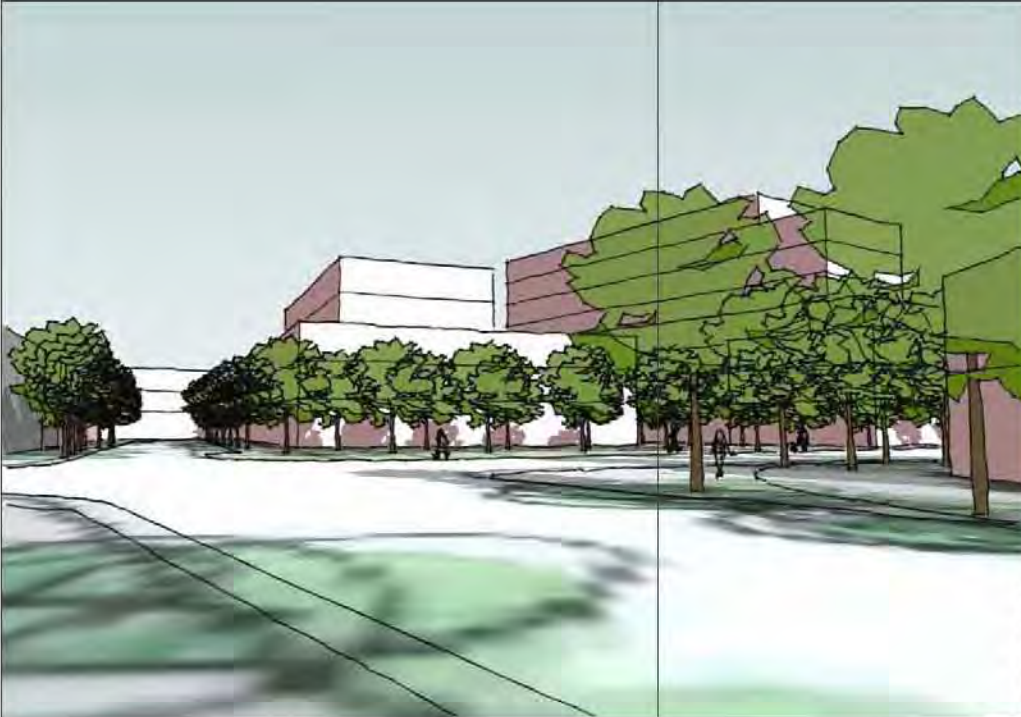
# DEVELOPMENT STUDIES: LOT 7-B



ZONING PRESENTATION September 17, 2007  
Bryn Mawr Civic Association  
September 17, 2007

E R A

# DEVELOPMENT STUDIES: LOT 7-C



Bryn Mawr Civic Association  
ZONING PRESENTATION September 17, 2007

ERA

# TOWNSHIP OF LOWER MERION

## Ad Hoc Bryn Mawr Committee

Thursday, September 20, 2007 at 4:00 PM

### Meeting Notes

#### **Members in Attendance:**

Commissioner Scott Zelov, Chair  
Susan Arizini  
Vincent DiCioccio  
Mike Fanning  
Jo Ann Magnetta  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

#### **Guests:**

Susan Gibbons, Gannett Fleming  
Mark Radovic, Gannett Fleming  
Richard Bickel, DVRPC  
Anne Leavitt-Gruberger, Montgomery County Planning Commission

#### **Staff in Attendance:**

Doug Cleland  
Angela Murray  
Bob Duncan

#### 1. Report from the Chairman

Commissioner Scott Zelov welcomed the members back after our two month summer hiatus. Scott made note of the presentation on the zoning proposal that was given by Bob Duncan at the Bryn Mawr Civic Association meeting the previous Monday night, September 17, 2007. There were about 30 members of the community present along with committee members Pat Wesley, Hank Wilson and Mike Fanning. Scott reminded the members that there would be a public presentation of the zoning proposal by Sasaki consultant Kathryn Madden on Wednesday September 26, 2007 at 7:00 PM in the Board Room in the Township Administration Building.

#### 2. Presentation from Sue Gibbons and Mark Radovic from Gannett Fleming

The preliminary data from the Bryn Mawr Master Plan traffic study was presented via a power point by Sue Gibbons and traffic planner Mark Radovic. The presentation included information from the Synchro Model that is under development by the consultants. Sue noted that even though population in Bryn Mawr is not growing, traffic growth increases although less than in areas that are still undergoing development such as Chester County. Traffic growth was estimated



at 1% which is the percent most recently found acceptable by PADOT for inner ring suburban Philadelphia areas that are built out such as Lower Merion.

The analysis was generated using the build out proposed in the Bryn Mawr Master Plan matched with research that generated source materials for areas surrounding transit stations. This information included the seminal work on transit districts, "The Case for Transit Villages" by Robert Cervero and several books from the Transit Cooperative Research Program of the Transportation Research Board on Transit-Oriented Development in the United States sponsored by the Federal Transit Administration. A question was asked regarding the analysis of "peak" hour traffic in Bryn Mawr since there seems to be more day time traffic generated by visits to medical offices that operate on a high frequency of visit. Generally, traffic is more evenly disbursed during the day than at either peak hour with the evening peak typically heavier than morning when it is more spread out between 7:00 and 9:00 AM.

Sue made note that the Synchro model is consistent with the hospital traffic study and includes the additional data secured by traffic counts conducted for this study. The maps showing base existing conditions and then build-out to 2018 show signalized and non-signalized intersections and the counts represent true peak hour performance. Montgomery Avenue is scheduled for the installation of the closed loop synchronization system which is a state project that will program 30+ intersections and allow for more sensitive traffic management based on time and use. This system is in place on Lancaster Avenue.

Sue explained the findings of the analysis of the various traffic suggestions in the Bryn Mawr Master Plan. The counter clockwise one-way circulation around Lot 7 did not provide the level of improvement hoped. However, there does seem to be capacity in the overall traffic network that dictates looking at other improvements that would provide corrective measures throughout the Bryn Mawr system. Under consideration is the prohibition of left hand turns at certain key intersections in order to disburse traffic more evenly through the area. Other than existing conditions at the Five Points and Pennswood and Montgomery intersections, the overall network is performing at an acceptable level of service with no compromise in pedestrian connections.

Sue emphasized that the calculations will need to be quantitatively rechecked against the information received from Bryn Mawr Hospital's traffic model prior to reaching final conclusions. Then the remaining qualitative analysis including traffic calming, intersection improvements and signalization changes can be studied and recommended improvements can be made to the Committee.

Questions were asked about how the various grades from A-F are determined and it was explained that they represent various levels of timed delay with F being failure point. Another question was raised about pedestrian flow and typically, pedestrian flow is difficult to measure without on-site counts. However, the goal of the Bryn Mawr plan is for increased pedestrian utilization of the Bryn Mawr business district and from that standpoint, suggested changes will incorporate pedestrian friendly improvements. Pedestrian phased signals are typically not favored by PADOT, but they can be explored at certain key intersections such as Bryn Mawr and Lancaster Avenues.

The inter-modal split that was utilized to forecast future traffic around the station area was based on real life data from the sources named earlier. In addition, the area around Lot 7 and most specifically the Tango intersection would be a high priority for capital improvements funding to make it safer, pedestrian friendly and more efficient operationally. Scott emphasized that we should expect to see even more improvements once the Five Point intersection is completed.

It was noted that if we do nothing or build out to the full extent of the Master Plan over the next 10 to 20 years, traffic increases will be the same. However, with mitigation, we will be able to go forward with the redevelopment of the key locations in the Master Plan. Thus, a mitigation strategy will be developed as a practical long term solution with prioritizing intersections for improvements.

The next steps include the quantitative verification and checking of the coding for the Synchro model, qualitative analysis to evaluate scenarios for improvement, analysis of pedestrian movements that have been quantified and evaluation of capacity levels and recommended improvements. Sue suggested that the Committee think about where they would like the consultants to focus their attention for the remainder of the study.

### 3. Zoning Issues

Earlier today a list of issues was distributed via e-mail that listed concerns raised by members over the last two months since Kathryn Madden's last zoning workshop with the Committee. In addition, questions raised at the Civic Association meeting on Monday night were also added to the list. A conference call was then held among Scott Zelov, Bob Duncan and Angela Murray to review the concerns and suggest solutions.

Several issues are highlighted that are of sufficient importance to warrant discussion among the Committee members. These include height in the various districts and bonus provisions that provide for maximums. Also, an elaboration of the districts to 4 from 2 was recommended with decreasing densities going from V1 to V4. Bryn Mawr Hospital has provided a letter noting some significant problems with the proposed V3 zone and this issue will require further discussion.

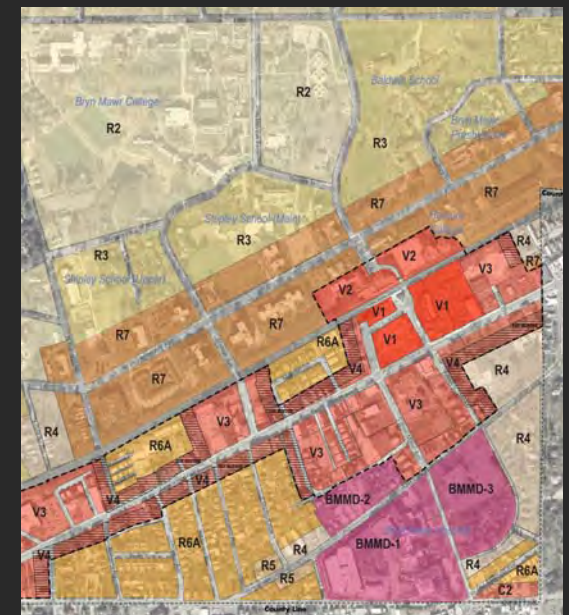
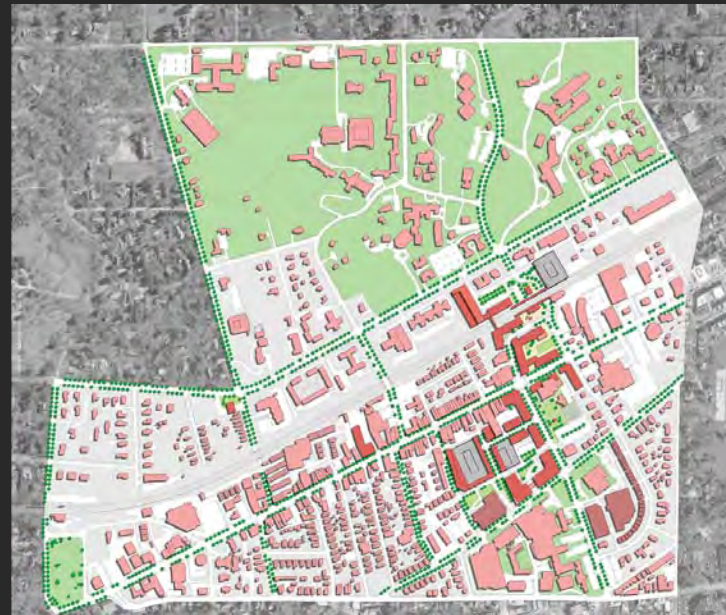
Several definitions are being developed for use in the future ordinance. However, it has been determined that since LEED is a brand definition, we are now considering going with a more generic green roof concept for a bonus. There have been several suggestions for requiring open space and how best to accomplish this is being studied.

4. Commissioner Zelov announced that the previously scheduled public meeting on the TRID will be postponed while we continue to refine the zoning concepts. The next meeting of the Committee will take place on Thursday October 18, 2007 at 5:30 PM in the Caucus Room on the second floor of the Township Administration Building. We will continue with refinements to the zoning outline, review comments received at the public meeting and provide additional information on the traffic study.

# Bryn Mawr Master Plan

## ZONING CONCEPTS

26 September 2007



ERA

SASAKI

# MASTER PLAN PROCESS

December 2005 - June 2006



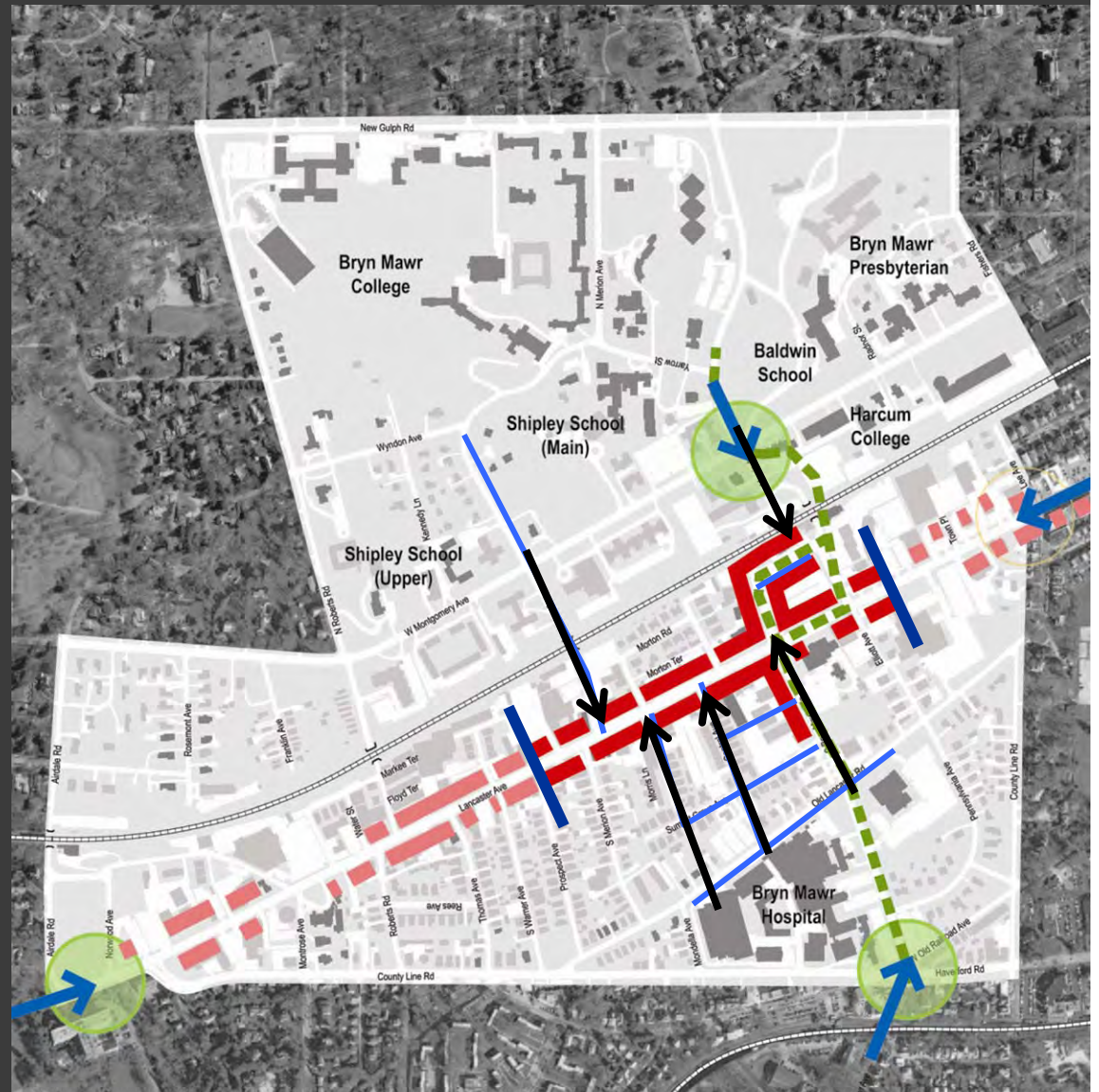
# MASTER PLAN: ISSUES

- Hospital expansion
- Lack of comprehensive vision
- Character of street and retail on Lancaster Avenue
- Linear corridors as barriers
- Circulation around train station
- Student housing
- Relationship of hospital and colleges to town center
- Lack of identity on Main Line



# MASTER PLAN PRINCIPLES

1. Network of pedestrian-friendly streets
2. Points of arrival to the village
3. Transit-oriented development
4. Retail on Lancaster and Bryn Mawr
5. Hospital and schools to be connected to the center
6. Variety of housing types
7. Civic spaces for community use



# LOOKING AHEAD

## Main Line Village

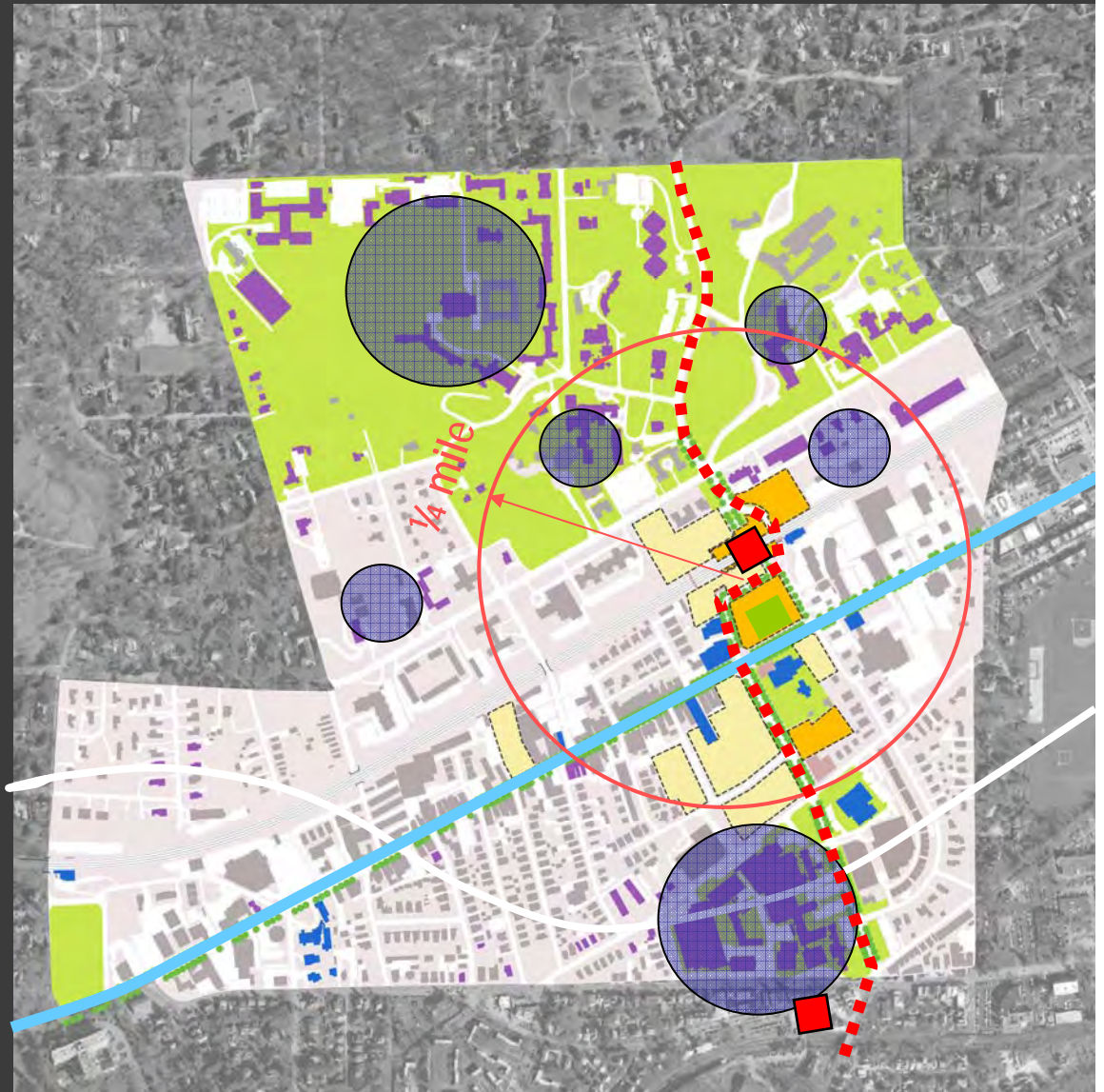
A **forward-looking and distinctive identity** based on historic town relationships and current strengths

## Civic Places

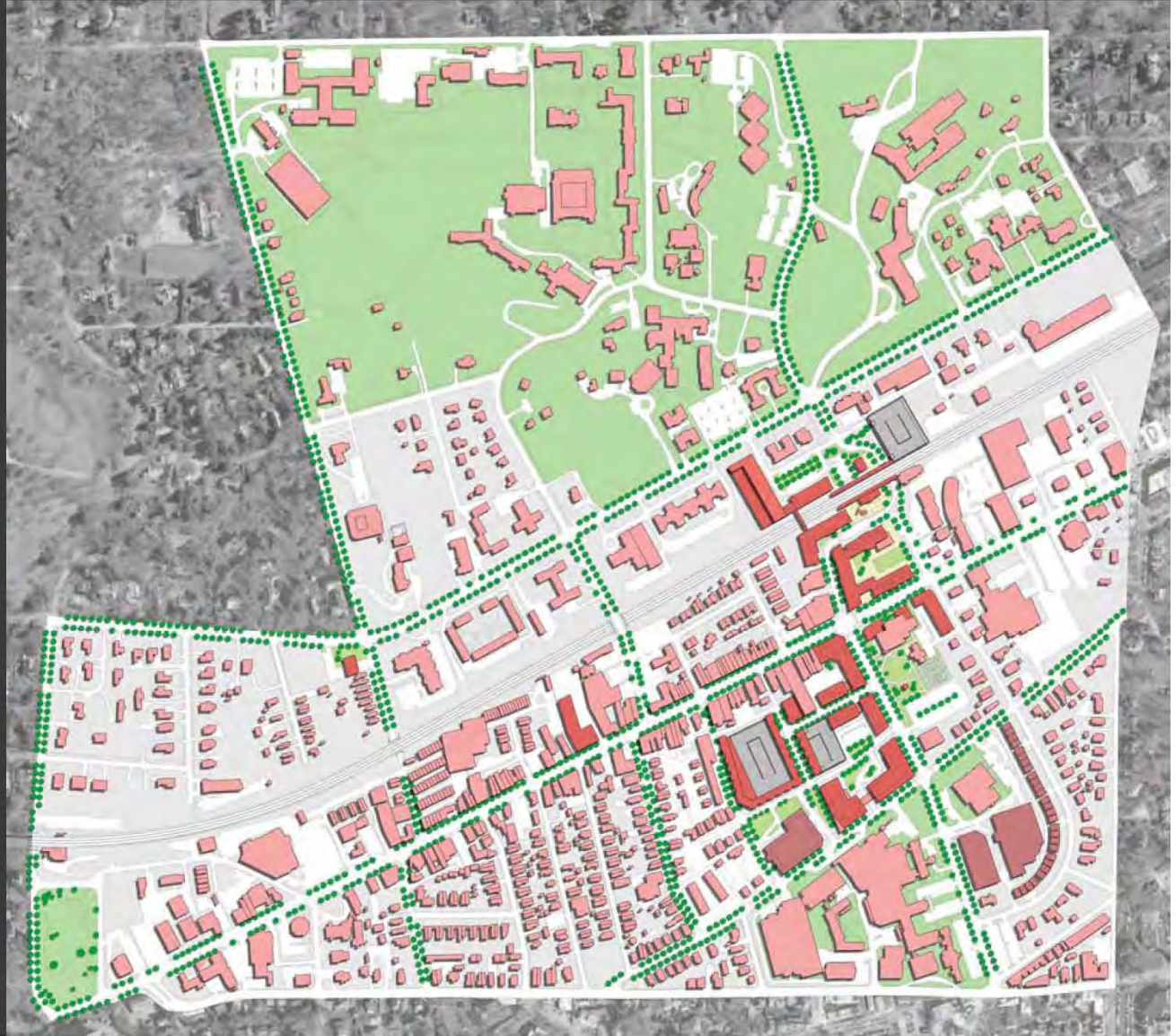
New activity and **sense of place** at the Station, Town Square, Community Center, Central Avenue, and Lancaster Avenue

## Connectivity

Attract populations that already **live, work and study within walking distance** of the village

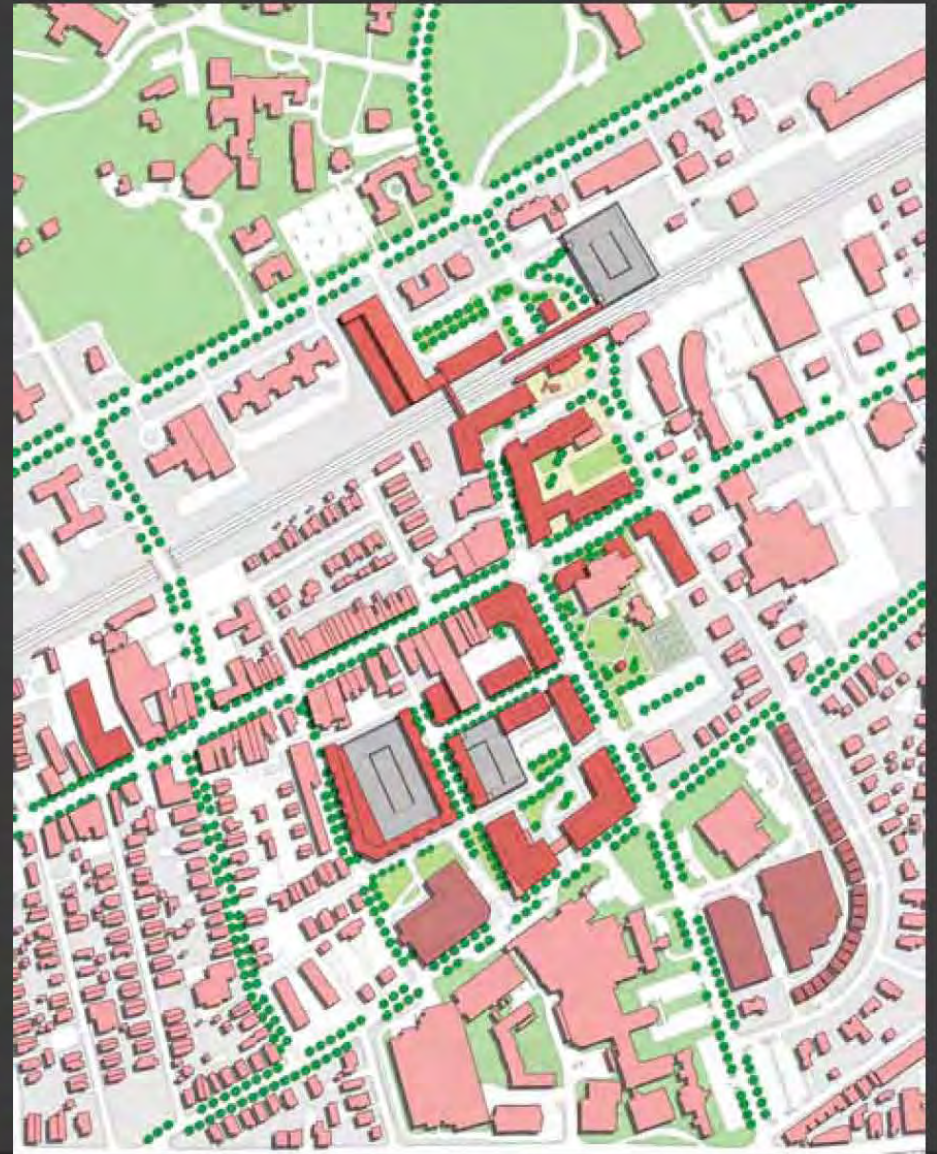


# MASTER PLAN





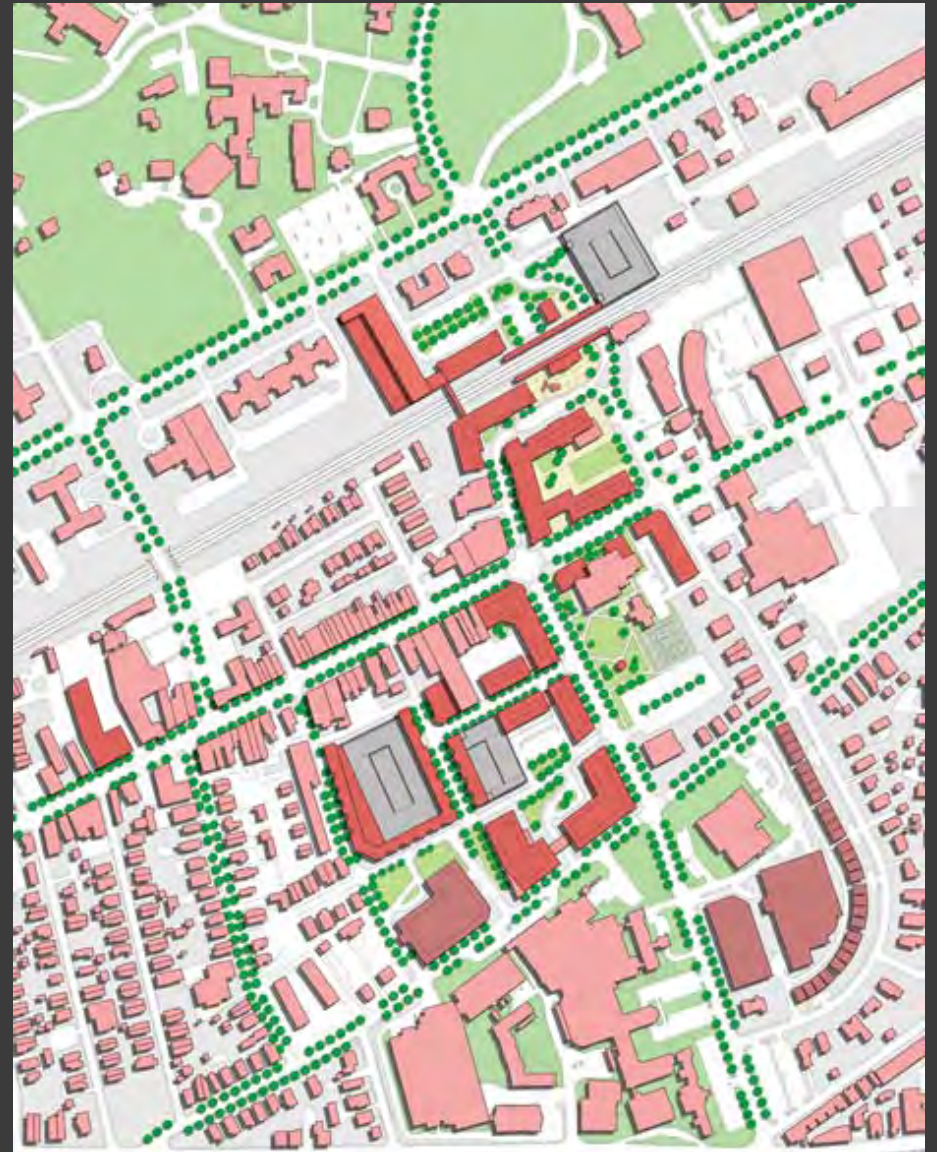
# MASTER PLAN



# MASTER PLAN

## Action Agenda

- Traffic study
- Retail study/recruiter
- Financing method for public improvements: TRID
- Business Improvement District
- Zoning update



# ZONING PROCESS

## Why tackle zoning

1. Cost of construction and cost of land limit investment
  2. Patchwork of commercial zones now
  3. Update rules to reflect existing character
  4. Shape development before it happens
  5. Direct retail onto Lancaster and Bryn Mawr Avenues
  6. Vision for Lot 7, Central Avenue area
  7. Design Standards
- *Ongoing role for residents and stakeholders to have a say from master plan to zoning and beyond*
  - *Achieve Bryn Mawr's potential*

# ZONING PROCESS

## Ad Hoc Committee Zoning Workshops:

- April
- June
- July
- September

## Bryn Mawr Civic Association,

- September 2007

## Agenda

- Research zoning models
- Identify concepts
- Test form
- Refine rules

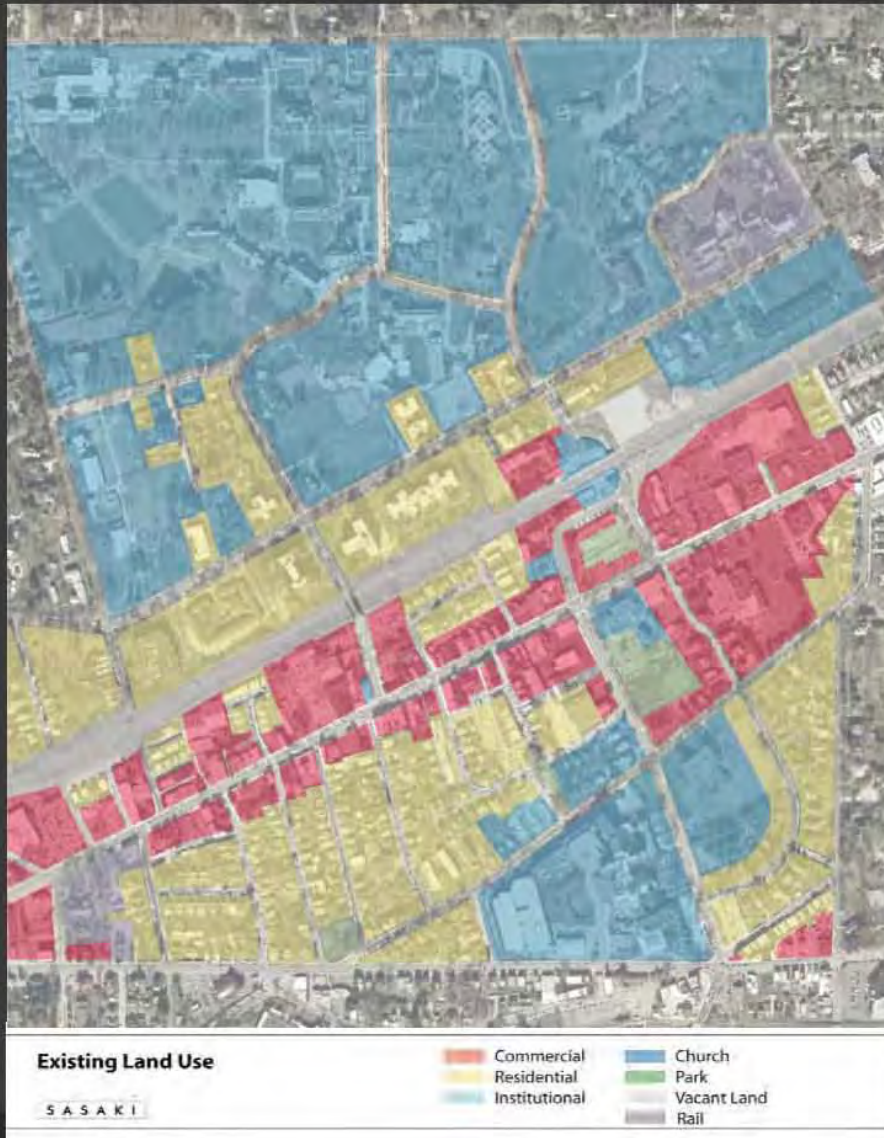
## Criteria for Successful Zoning

1. Maintain village character
2. Traffic impacts addressed
3. Density focused near station
4. Ad Hoc Committee support

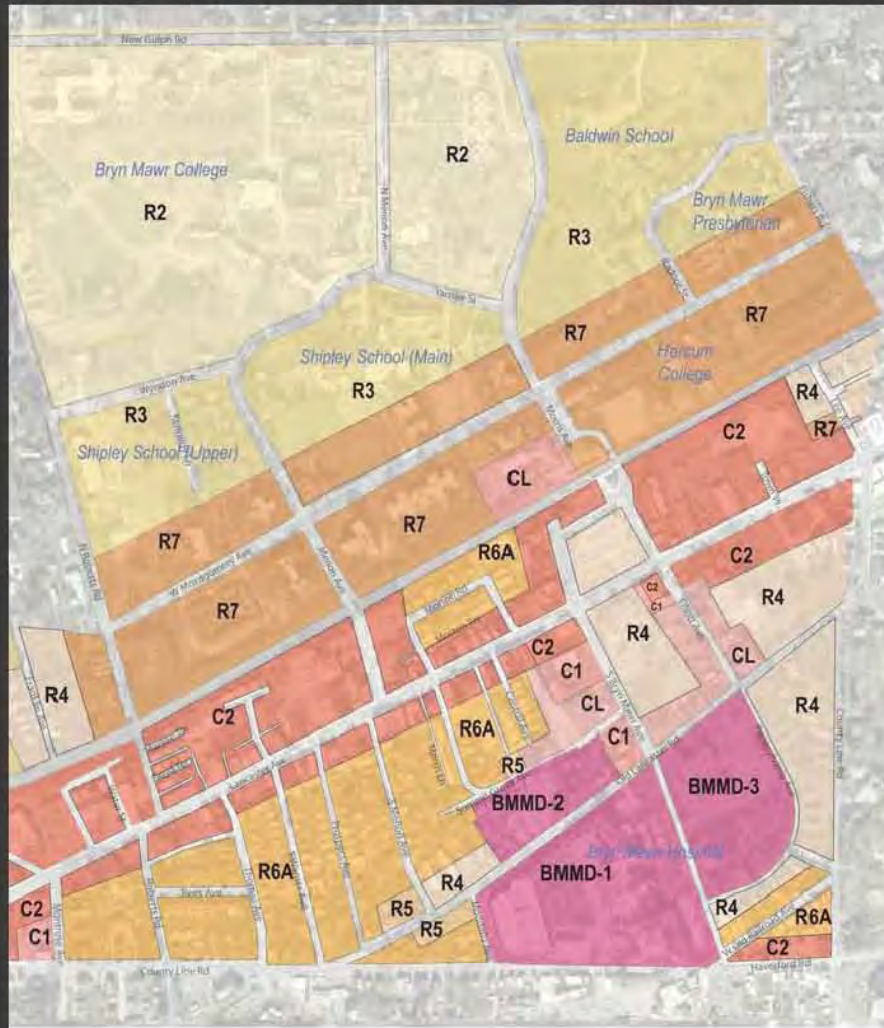
# ZONING OUTLINE

1. Village Zone Map
2. Purpose and Applicability
3. Use Regulations
4. General Requirements for Historic Structures
5. Dimensional Standards for Development
6. Bonus Provisions
7. Parking and Loading Requirements
8. Development Design Standards
9. Signage

# 1. ZONING MAP

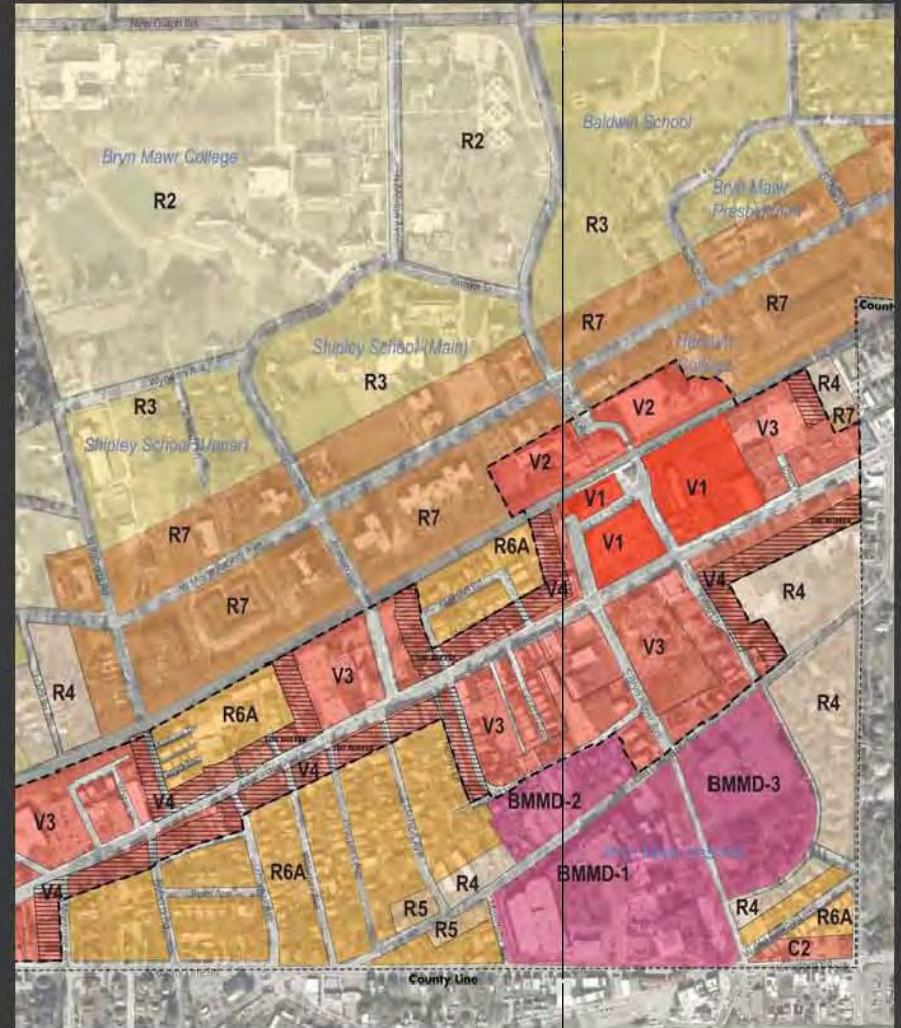


# 1. ZONING MAP



Existing Zoning

SASAKI



Proposed Zoning

SASAKI

- V1 - Village Station South
- V2 - Village Station North
- V3 - Village Main Street
- V4 - Village Buffer

# NEW DEFINITIONS

## For permitted and prohibited uses and technical terms

- Affordable housing
- Workforce Housing
- Green Roofs
- Step Back
- Transit Facilities
- Massage Parlors
- Transit Oriented Development (TOD)



## 2 . P U R P O S E

1. Encourage economic development while maintaining the **traditional main street environment**.
2. Protect existing **residential neighborhoods**.
3. Establish a **walkable community** by promoting pedestrian-oriented streets and pedestrian scale buildings.
4. Encourage lively, human-scaled activities within a **mix of residential, commercial, cultural and other uses** separately or in the same building.
5. Encourage **active ground floor retail** and discourage service uses on Bryn Mawr and Lancaster Avenues to ensure a vibrant street life.

## 2. PURPOSE (CONTINUED)

6. Promote the reuse of existing structures in a manner that maintains the **historic and visual character** and architecture and building scale of the neighborhood.
7. Reduce auto dependency by promoting **transit ridership, bicycling and walking**.
8. Accommodate parking in a convenient and unobtrusive manner and encourage **shared parking**, where possible.
9. Promote **residential uses in upper stories**.
10. Concentrate **commercial and retail uses on the ground level** of mixed-use buildings.

## 3 . USES : RESTRICTIONS

### Use Restrictions in the V2 Village Station North:

#### Allowable uses

- Residential
- Structured Parking.

#### Conditional uses

- Office
- Educational

*[conditional use standards to be added limiting amount of office space]*

## 3. USES: ALLOWABLE

### Allowable in V1, V3, V4

1. Retail
2. Restaurants
3. Galleries and museums
4. Theaters
5. Inn, hotel, B&B
6. Transit facilities
7. Public gathering space, park, and plaza
8. Farmers markets
9. Private clubs and fraternal organizations
10. Parking structure
11. Residential with 80% of the first floor as retail uses
12. Upper story residential uses
13. Municipal office, civic and administration buildings
14. Accessory uses

## 3. USES: SIDE STREETS/UPPER LEVELS

### Allowable in V1, V3, V4

1. Business offices
2. Professional office
3. Personal services
4. Bank or loan institution
5. Dance, music, fitness, or art studios.
6. Residential uses with range of types

## 3. USES: CONDITIONAL

1. Government, public utility facilities.
2. Funeral homes.
3. Religious institution and ancillary uses.

## 3. USES: PROHIBITED

1. Automobile related
2. Gas station
3. Drive-through facility or window
4. Fast food restaurants
5. Storage or mini-warehouse as principle use
6. Adult entertainment
7. Check cashing
8. Tattoo establishments
9. Massage parlors

## 4. HISTORIC STRUCTURES

National Register of Historic Places or Class I or Class II Historic Resources may not be demolished unless all of the following criteria have been met:

1. Structurally unsound and cannot be stabilized
2. The Lower Merion Township Historical Commission (LMHC) notified and review application
3. The replacement building provides a significant public amenity
4. The replacement building must be constructed of natural materials
5. The replacement building must meet the Development Design Standards in Section xxx and provide documentation.

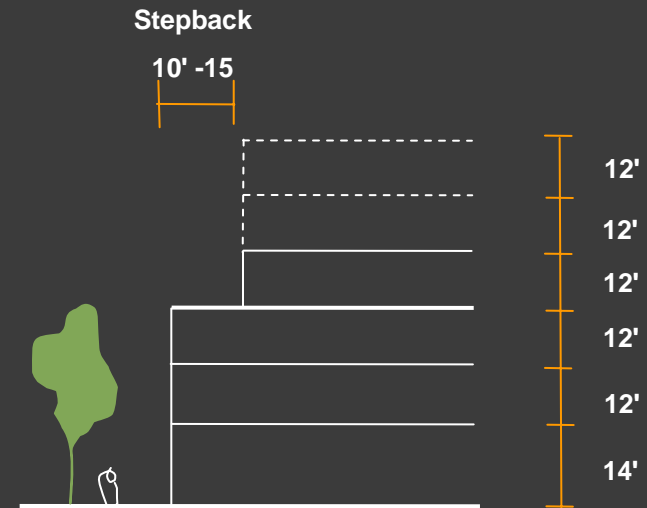
*[Subject to review by Solicitor]*



# 4. DEVELOPMENT STANDARDS

## A. Build-to-Line

1. Build to the right-of-way line
2. Setback from the sidewalk 10 to 30 feet for plazas, parks
3. Front door on main street
4. No auto related areas in front of the building
5. Step-backs of 10 feet or more required for façade above three stories



# 4. DEVELOPMENT STANDARDS

## B. Side Yard Setback

1. Party wall or 10 foot setback

## C. Impervious Coverage

1. Small lot at 100%
2. Large lots at 80% unless green roof

## D. Open Space

1. V1 Station South at 20%
2. Other large parcels 5 -10%

## E. Individual Tenant Space

1. Maximum of 12,000 sf



# 4 . DEVELOPMENT STANDARDS

## F. Height and Density

	V1 Station South	V2 Station North	V3 Main Street	V4 Village Buffer
Minimum Height	2 stories	2 stories	2 stories	2 stories
Street Wall Height (maximum)	3 stories (38 feet)	3 stories (38 feet)	3 stories (38 feet)	3 stories (38 feet)
Total Height (maximum)	5 stories (62 feet)	3 stories (38 feet)	4 stories (50 feet)	3 stories (38 feet)
Stepback (min.)	10 feet	--	10 feet	10 feet
FAR (max.)	2.1	1.6	1.6	1.6

## 4. B O N U S P R O V I S I O N S

### A. Bonus provisions for up to two of the following conditions

1. **Affordable or Workforce Housing:** FAR increase 0.2 if 20% of total units are affordable or moderate income units
2. **Public Space:** FAR increase 0.2 if at least 10% of total lot area is dedicated contiguous Public Gathering Space (minimum 1,000 sf)
3. **Underground Parking:** FAR increase 0.2

# 5. BONUS PROVISIONS

## F. Height and Density with Bonuses

	V1 Station South	V2 Station North	V3 Main Street	V4 Village Buffer
Minimum Height	2 stories	2 stories	2 stories	2 stories
Street Wall Height (maximum)	3 stories (38 feet)	3 stories (38 feet)	3 stories (38 feet)	3 stories (38 feet)
Total Height (maximum)	6 stories (74 feet)	3 stories (38 feet)	5 stories (62 feet)	3 stories (38 feet)
Stepback (min.)	15 feet	---	15 feet	--
FAR (max.)	2.5	1.6	2.0	2.0

## 5. PARKING & SERVICE

### A. Single Use Parking

1. Parking not required for existing commercial or mixed-use buildings on a lot smaller than 3,000 sf that has a 30 foot or less road frontage.
2. Changing a non-residential use in an existing building does not require additional on-site parking provided that:
  - New use requires not more than fifteen (15) additional parking spaces above that required by the existing use; and
  - Any exterior changes to the building comply with the Development Design standards in Section xxxx.

## 5. PARKING & SERVICE

3. All other single use development must follow ratios below:

- Residential 1.5 per unit
- Affordable/workforce housing 1.0 per unit
- Continuing care facility 1.0 per unit
- Commercial 4 per 1000 sf
- Hotel 1 per room
- Theater 1 per 5 seats
- Fitness center 5 per 1000 sf

# 5. PARKING & SERVICE

## B. Surface Parking

1. Vehicular access from alley or side street
2. Surface parking and exterior loading areas located between the structure and rear lot line.
  - Parking frontage on side streets if necessary
  - Well lit pedestrian ways
  - Visibility from street screened by low shrubs
  - Maximum frontage of 70 feet
  - Buffer with street trees, shrubs, low fences, seating
3. Surface parking is not public gathering or open space



## 5. PARKING & SERVICE

### c. Parking Structures

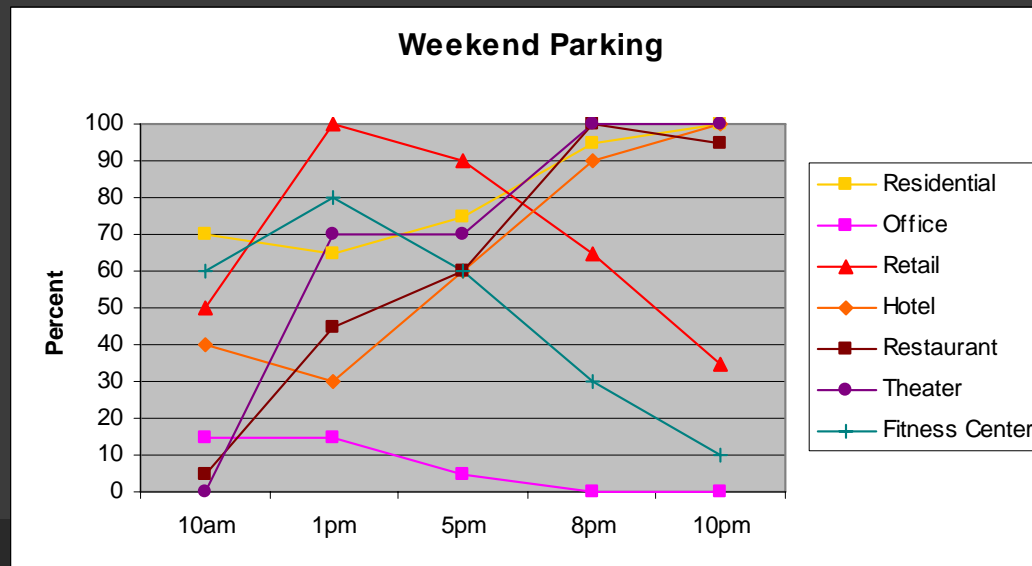
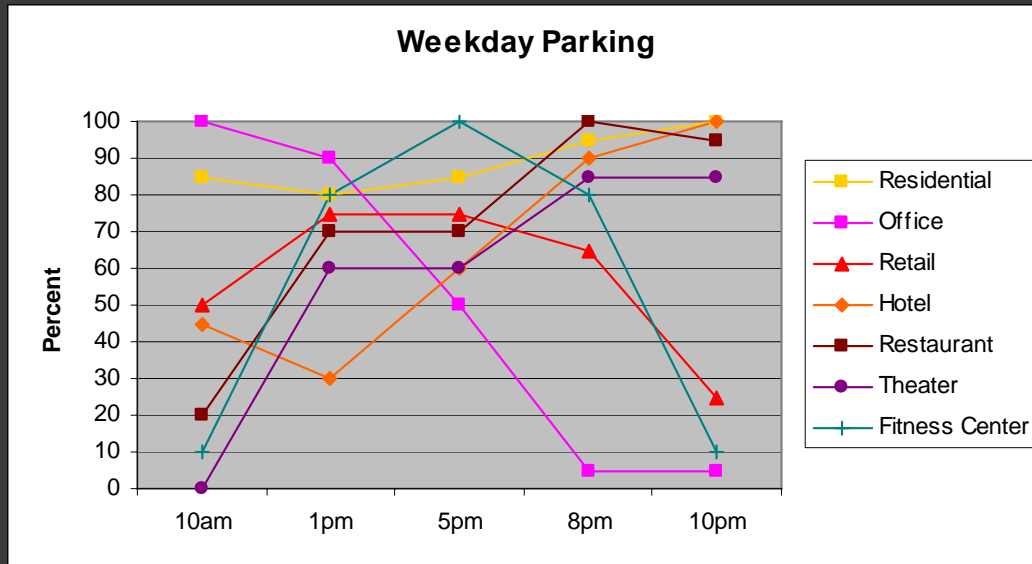
1. Parking Structures shall be internal to the block, or placed underground, or fronted or wrapped with retail or residential uses, except in V2 Station Zone North.
2. Sloping floors and bare slabs shall not be visible from a Lancaster or Bryn Mawr Avenues.
3. Vehicular access to parking structures shall be from side streets or alleys where possible, except V2 Station North.
4. Front facades of parking structures visible from a street or pedestrian way shall be pedestrian oriented and scaled and complement nearby commercial facades

## 5. PARKING & SERVICE

### D. Shared Parking for Mixed-Use

1. Reduction permitted if shared parking requirements are met and the use is located within 1000 feet of a public parking facility or transit facility or on-street parking is available.
2. For mixed-use, calculations for shared parking can be applied to determine the minimum of parking required.
3. The Source of Peak Demand Percentages for purposes of calculation is based on the Urban Land Institute's Shared Parking Standards.

# 5. PARKING & SERVICE



- Different uses have different demands throughout the day and week
- Example: complementary uses are work and recreation (fitness, theater, restaurants, hotels, etc.)
- Residential owners typically require dedicated spaces but visitor parking complements retail and office use.

## 5. PARKING & SERVICE

### E. Service

1. Avoid placing next to residential areas; visually screen and minimize noise, sound, and odors if adjacent to residential
2. Store refuse inside building or within outside area enclosed by 6-foot walls or opaque fencing, not in front yard
3. All wall mounted mechanical equipment screened from public view
4. All rooftop mechanical equipment screened from ground level view

# DEVELOPMENT STUDIES: LOT 7 - A



street wall	3 stories
max height	5 stories
stepback	10 feet
building setback	0 -30 feet
development area	188,000 gsf
FAR	2.1



Lancaster Avenue eastbound



Lancaster Avenue westbound

# DEVELOPMENT STUDIES: LOT 7 - A



street wall	3 stories
max height	6 stories
stepback	15 feet
building setback	0 - 10 feet
development area	224,000 gsf
FAR	2.5



Lancaster Avenue eastbound

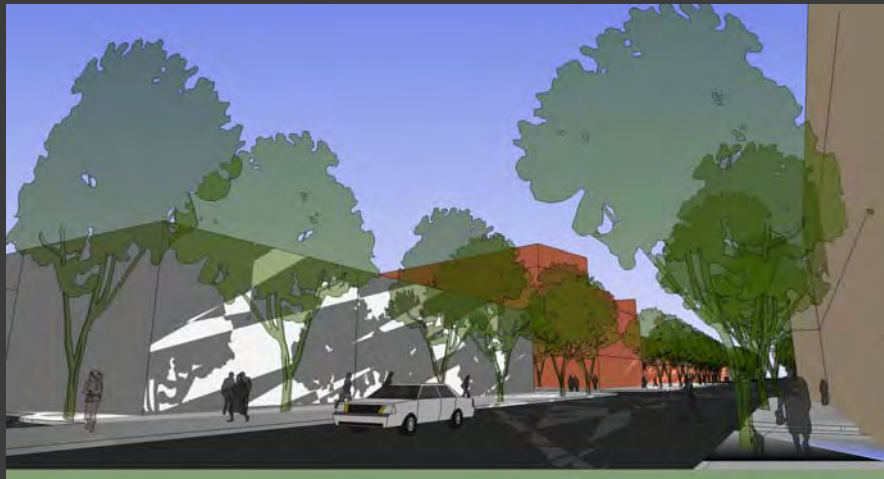


Lancaster Avenue westbound

# DEVELOPMENT STUDIES: LOT 7 - A



street wall	3 stories
max height	6 stories
stepback	15 feet
building setback	0-10 feet
development area	224,000 gsf
FAR	2.5



Lancaster Avenue eastbound



Lancaster Avenue westbound

# DEVELOPMENT STUDIES: VERIZON



street wall	3 stories
max height	4 stories
stepback	10 feet
building setback	0 feet
development area	75,000 gsf
FAR	1.6



Lancaster Avenue eastbound



Lancaster Avenue westbound



# DEVELOPMENT STUDIES: VERIZON



street wall	3 stories
max height	5 stories
stepback	15 feet
building setback	0 feet
development area	95,000 gsf
FAR	2.0



Lancaster Avenue eastbound



Lancaster Avenue westbound

# 8. DESIGN STANDARDS

## Purpose

1. Complement pattern of landmarks and village fabric
2. Respond to pedestrian scale
3. Emphasize prominent locations
4. Create a consistent character



## 8. DESIGN STANDARDS

- Façade Articulation
- Façade Composition
- Ground Level Façade
- Architectural Expression: form and materials

Lack of Design Standards



Lack of Design Standards



## 8. DESIGN STANDARDS

- Façade Articulation
- Façade Composition
- Ground Level Façade
- Architectural Expression: form and materials



## 8. DESIGN STANDARDS

- Public Walkways
- Street Trees / Shade Trees



Old Lancaster Avenue

BRYN MAWR ZONING



Hayden Alley

ERA SASAKI

# 8. DESIGN STANDARDS

## Signage

- Flush Mounted Signs
- Suspended Signage
- Blade and Shingle Signage
- Banner Signage
- Awnings and Canopies
- Wall Plaques
- Street Address
- Permanent Storefront Window Graphics



# NEXT STEPS

Bryn Mawr Civic Association

October 15

Ad Hoc Committee

October 18

## General Process

1. Community feedback and comments
2. Update and refine zoning language with Ad Hoc Committee
3. Ad Hoc Committee and community support
4. Presentation to Board of Commissioners for discussion
5. Board of Commissioners authorization of public hearing
6. Planning Commission review
7. Montgomery County Planning Commission review
8. Public Hearing(s)
9. Board of Commissioners approval

# NEXT STEPS

[www.lowermerion.org](http://www.lowermerion.org)



## Ad Hoc Bryn Mawr Committee

Thursday, October 18, 2007 at 4:00 PM

### Meeting Notes

#### **Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Charles Bloom  
Jo Ann Magnetta  
Pat Wesley  
Hank Wilson

#### **Guests:**

Dave Fogel, Septa

#### **Staff in Attendance:**

Angela Murray  
Bob Duncan  
Eric Persson

#### 1. Report from the Chairman

Commissioner Zelov reported that Kathryn Madden made an excellent presentation of the zoning recommendations to the public on Wednesday September 26, 2007. There were approximately 35-40 people in attendance. The meeting was televised on Township Cable 7 and is available for viewing on the Library's on-line system. The power point presentation is posted on the Township web site as well at [www.lowermerion.org](http://www.lowermerion.org).

Minutes from the meeting were prepared in a Question and Answer format that was distributed to the Committee members last week with notations for concerns that require discussion and resolution. After this evenings meeting, any changes agreed upon will be incorporated into the Zoning Outline. Scott also made note that the Township was dedicating the burial of a time capsule on Wednesday, October 24<sup>th</sup> and that a copy of the Bryn Mawr Master Plan had been inserted into the capsule.

An update to the zoning proposal was given by Bob Duncan at the Bryn Mawr Civic Association meeting on October 15th where there were 15-16 members present. The community is being kept well informed of what is being proposed although there is concern about the level of participation among the businesses and property owners. Commissioner Zelov thought that the community was well aware of the changes started by the hospital and as a result there was awareness building regarding the zoning as well. He has received some unsolicited comments from members of the community that would indicate increased interest. There has been surprisingly little opposition which Scott attributes to a high level of sensitivity on the part of the consultant team to the residential and business communities concerns.

## 2. Bryn Mawr Zoning

Committee members began a review of outstanding issues by making note that the goal of the Master Plan and zoning is consistent with Smart Growth planning practices by bringing people back to the town center, stopping suburban sprawl and the loss of farms. This will be a good and positive change that has been approached in the right way. By creating the change via appropriate zoning, we are being sure that inevitable, but unguided change does not lead the way. We have to clearly articulate why we are proposing the new zoning district. The principles include that we are helping Bryn Mawr to live up to its potential and protecting existing assets. We need to approach this with the confidence that we are going in the right direction.

This thinking is consistent with the reasons for creating a Business Improvement District. It will increase the level of involvement by the business owners and promote the charm of shopping in the Village district. The goal should be to create an atmosphere where going to the King of Prussia mall is seen as a trek and shopping in Bryn Mawr village is seen as a quality of life choice.

The Committee worked its way through the Q&A by discussing points where more input was required:

- Because the right-of-way varies throughout the village, a concern was expressed about the build-to line. By establishing a minimum set-back from the curb of 10 feet, we will ensure at least a six foot sidewalk and four foot area for trees, shrubs, signage, etc.
- The concern about rezoning the Central Avenue area while there are still residents in the area was discussed since there are two aspects to the issue. The first is that those homes could remain there forever and therefore nothing would be built if the area was exempt. The second is the concern expressed that those homes would be non-conforming uses. The suggestion is to include single family dwellings to the list of allowable uses thus no non-conformity would occur.
- It was suggested that the 20% open-space requirement in the V1 extend to larger lots throughout the village district. Bob Duncan provided a map that showed larger lots in the area. There were four or five between 15,000 and 20,000 SF and a few others between 20,000 and 25,000 SF. It was agreed that further testing would be undertaken as well as discussion with the consultants to determine the appropriateness of requiring a somewhat lesser (5-10%), but mandatory open-space requirement on these lots.
- The lots on the east side of Morris Avenue across from Lot 7 would be changed from V1 to V3.
- The maximum by-right height in the V1 would be reduced to five from six and in the V3 to four from five. We will discuss these reduced heights with the consultant team to be sure that what is recommended can be financially supported.
- Increase the parking requirement from 1.5 spaces to 2 spaces per unit for those greater than 2 bedrooms.
- Require that any building in the V1 be mixed-use. Bob Duncan explained that we had required mixed-use structures in other districts and that it had become problematic in execution. This will be studied further.

Scott directed staff to make revisions to the zoning outline consistent with the committee's discussions. We will have further discussion with the consultant team on the issues requiring their input during our already scheduled conference call. Once we have a final draft of the zoning

proposal, Scott will ask the committee for a vote of support in order to move the recommendation forward to both the community and the Board of Commissioners. Staff will then continue their work on drafting an ordinance based on the proposal,

### 3. Traffic Study

Gannett Fleming is completing their analysis consistent with the discussions held at our September meeting. They looked again at the proposed counter-clockwise circulation around Lot 7 and determined that it could work if coupled with intersection improvements. They have also studied the intersection of Morris and Montgomery Avenues and recommended that consideration be given to relocating the corner entrance to the Baldwin School to allow for a right turn lane to be installed at the corner. This would increase the functionality of the intersection and traffic flow as well. Committee members made note that they did not support restrictions on left hand turns from Lancaster Avenue. They would like clarification on the various levels of congestion, for example, what does it mean to go from a C to a D, etc. Gannett Fleming will return to present their final analysis for the December 13<sup>th</sup> meeting of this committee.

### 4. Schedule

The revised zoning draft will be available to the committee before the November meeting for review and discussion. Scott mentioned that it was important to return to the TRID discussion in early 2008 once the zoning proposal is underway to complete the analysis prior to any of the hospital's properties coming on line. The hospital is still scheduled to complete their first Medical Office building in September 2008.

Scott proposed to move the December meeting to the second Thursday, December 13<sup>th</sup> from the third Thursday, December 20<sup>th</sup> since that date is so close to the holidays. Scott also requested that the meeting begin at 5:00 PM to allow enough time for presentation and discussion. The next meeting of the Bryn Mawr Civic Association will be on Monday November 19<sup>th</sup> where we will provide an update on the committee's discussions and zoning proposal. The next meeting of this committee will be at 5:00 PM on Thursday, November 15, 2007 in the Caucus Room of the Township Administration Building.

## Ad Hoc Bryn Mawr Committee

Thursday, November 15, 2007 at 5:00 PM

### Meeting Notes

#### **Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Charles Bloom  
Vince DiCioccio  
Pat Wesley  
Mike Weilbacher  
Hank Wilson

#### **Guests:**

Jim Paradise, Bryn Mawr Hospital  
Rich Bickel, DVRPC  
Brian O'Leary, Montgomery County Planning Commission

#### **Staff in Attendance:**

Angela Murray  
Bob Duncan  
Eric Persson

#### 1. Report from the Chairman

Commissioner Zelov noted the serious illness of our member Mike Fanning who had returned to Bryn Mawr Hospital and was not expected to survive. It is with deep sadness that we report the death the next day of Mr. Fanning whose presence at these meetings over the last many years has been so helpful to Bryn Mawr and this Committee's efforts.

Commissioner Zelov noted that the Board of Commissioners at their meeting on Wednesday November 14<sup>th</sup> had a moment of silence for Police Officer Chuck Cassidy who was killed in the line of duty in Philadelphia. Chuck was the husband of Judy Golden, sister of Sue Golden who is the owner of Stiletto shoes in Bryn Mawr. Judy works at Stiletto and she and Chuck were at the recent grand opening party there where many Bryn Mawr residents and Township staff had met and spoken with them both.

The Board of Commissioners approved a capital improvement expenditure for Hayden Alley for benches, plantings, pavers and other improvements. This was a favorite project for Mike Fanning as President of Bryn Mawr Beautiful and Eric Persson noted Mike's continued involvement in the project even through his illness. A pre-construction meeting is scheduled and coordination with Frank Agostino whose business abuts the alley will be ongoing.

The Board of Commissioners has also approved free holiday parking at meters on Saturdays in the Bryn Mawr and Ardmore business districts. Specifics as to how this operates can be discussed with Eric Persson, Township Economic Development Specialist or with Vince DiCioccio from the Bryn Mawr Business Association.

## 2. Bryn Mawr Hospital Update

Jim Paradise attended on behalf of Andrea Gilbert and Joann Magnetta who both had a Hospital Board related meeting requiring their attendance. Jim reported that the hospital had received approval for the first part of the new emergency room that includes the ambulatory entrance on Bryn Mawr Avenue. It will open to the public on November 27<sup>th</sup> with a new entrance, registration and triage areas.

## 3. Bryn Mawr Zoning Issues Discussion

Scott reminded the members that a number of changes had been made to the outline after the last meeting and also included feedback received from members of the community. A revised zoning outline dated November 12, 2007 was distributed along with operating definitions for the Ordinance and a memorandum from Kathryn Madden for discussion. By-right heights have been reduced from five to four in the V1 and from four to three in the V3.

A conference call was held by staff and Commissioner Zelov with Kathryn Madden and Mac Nichols to discuss various changes made to the recommendations that they felt they did not agree with. These concerns are explained in the memorandum. In addition, a conference call was held with Andrea Gilbert, Joann Magnetta, Jim Paradise and attorneys for Bryn Mawr Hospital to discuss their concerns about recent changes to the zoning proposal. The two main categories are the height and uses in the V3 particularly in the Central Avenue area. Jim explained that the hospital had serious concerns about the economic feasibility of development with reduced height even with the bonus provisions. The ability to go underground with parking as well as management of storm water in that location was extremely problematic. They thought that the V3 densities should be closer to those in the V1 or else it is too restrictive for development to occur.

Jim reviewed a list of definitions that the hospital would like to have in the V3 such as medical offices and housing for medical resident families. Some members noted that the BMMD was created to allow for expanded uses within the medical zone and it was intended to keep those uses from spilling into residential area. Others recalled that the Master Plan called for a parking garage wrapped with housing and that the expectation was to return the area to housing and mixed-use. The Board of Commissioners thought it was important for the hospital to be able to expand on the trapezoid and for the remaining BMMD areas to house transitional hospital uses.

Scott noted that height is the single most sensitive issue to the community and that while the BMMD was for the hospital, the Village Zone is for Bryn Mawr. One member recalled the specific designs and plans that the hospital had shown many years ago when expansion plans were first proposed. Another suggestion was for an additional story on V3 lots that included a step back as a way to address some additional density without affecting pedestrian views.

Kathryn Madden's memo discusses her view as to how accomplish open space on V3 lots which is to not require it since it will reduce the ability to develop Central Avenue as proposed in the Master Plan. She recommends including green roofs as a bonus incentive that would help accomplish storm water management. There was additional discussion about impervious surface requirements and how best to accomplish this without having unintended consequences of open areas in the rear of buildings or set backs that are inconsistent with the street wall. There needs to be sufficient area for wide sidewalks and street trees, but the requirements should still allow for a high threshold of impervious surface on Central Avenue.

On page three of Kathryn's memo a build-to-line is recommended for Lancaster and Bryn Mawr

Avenues rather than a set back to preserve the consistent street wall and provide pedestrian comfort. While this is most important for these major streets, it was agreed that the ten-foot set back would remain as part of the V3 district.

A question was raised about the specificity of the definition of a green roof. It was agreed that further refinement was needed to allow for greater flexibility in a rapidly changing technology. Staff will continue to research the issue and bring back some alternative definitions. A question was next raised about the specific nature of historic preservation requirements and how they tracked existing Township code rather than address the Bryn Mawr district individually. Bob Duncan cautioned that the current proposal was unlikely to be approved by the Township Solicitor because they prevented demolition of structures.

A question was raised about the trees on Lot 7 and whether they would be preserved as part of the redevelopment since they are such a significant part of Bryn Mawr. Bob noted that preservation of trees as well as compensatory plantings are always a part of the land development process. Although it may be difficult to save trees in the middle of the site, the perimeter trees would certainly remain. On the V1 it is likely that the open space requirement will include plantings. Brian O'Leary noted that the County Town Center Model Ordinance has several alternatives for planting areas in locations such as this. It was agreed that this information would be incorporated into the Village zoning proposal.

A suggestion was made by Mac Nichols that an alternative methodology be developed for the affordable housing bonus by contributing to an affordable housing trust fund. This would be in the form of an "in-lieu-of payment" that is often used in other jurisdictions to achieve affordable and workforce housing alternatives. A similar requirement is contained in the Mixed Use Special Transit Overlay (MUST) Ordinance for Ardmore with the payment tied to the cost of building construction. This has not produced the desired results since the payment would far exceed a reasonable amount in exchange for the bonus. Staff is studying various ways to include such an alternative in the Village Zone that could include tying the bonus to a Trust Fund with payments tied to a system that would be updated on a yearly basis. This would prevent having to place a specific payment amount into the zoning code and could be used in other areas of the Township.

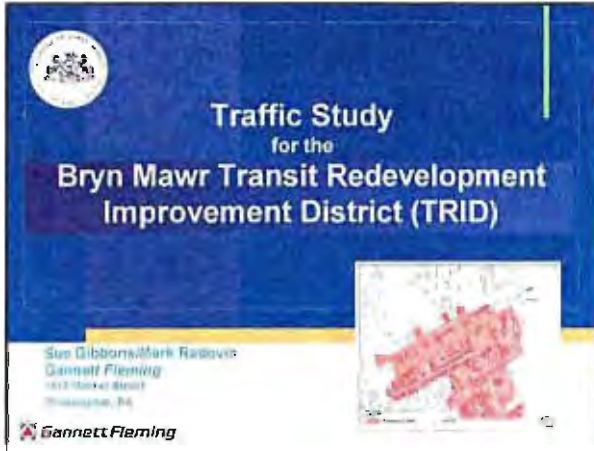
There is concern in Bryn Mawr that many residential buildings are becoming rental properties and that some properties are not being properly maintained. It is possible that proceeds from the Trust Fund could be used to rehabilitate rental properties as long as they were rented to qualified individuals and families.

Other concerns expressed recently include defining what a Village is which is included in the definitions handout for review and discussion by the members. Other concerns include the future cost of structured parking to residents. It was noted that all consultants that we have had to study parking in Bryn Mawr have observed that new parking will require a public subsidy in one form or the other.

Another question was asked about whether retail would be permitted on upper floors in the Village Zone and as drafted, it would be an allowable use. Scott announced that the Bryn Mawr Civic Association would not be meeting on Monday November 19th so that members could attend the Township meeting on the Comprehensive Plan scheduled for Tuesday November 20<sup>th</sup>.

The next meeting of this Committee will take place on the second rather than third Thursday of December which is December 13<sup>th</sup> at 5:00 PM. We will receive a report of the traffic study from

Gannett Fleming. Please be sure to send any information regarding changes to the updated Village Zoning proposal to Angela Murray.



## Background/Purpose

- ❖ The focus of the study is to determine transportation implications of the development proposed in the Master Plan.
- ❖ The study area of Bryn Mawr Hospital Study (conducted in 2006) did not include key intersections within Bryn Mawr. This will be included in this study as part of the background traffic.
- ❖ Analysis includes 21 intersections within Bryn Mawr.
- ❖ Analysis identifies which intersections are anticipated to operate at inadequate levels of service:
  - As a result of the Hospital Expansion and background traffic growth
  - As a result of Master Plan development
- ❖ Analysis will evaluate the impact the various roadway scenarios that are discussed in the Master Plan.
- ❖ Identify additional mitigation measures to offset additional delays associated with the anticipated development within the Master Plan.

Bryn Mawr Traffic Study

## Methodology

- ❖ Traffic Analysis was performed using SYNCHRO software, and was developed from the same model used for the Hospital Study.
- ❖ Construction of the Hospital includes 2 phases. Phase 1 has an anticipated completion year of 2008, while Phase 2 has a completion year of 2012.
- ❖ Traffic Analysis that was performed assumed 2008 as a base condition with a 10-year horizon for the forecast year (2018). These analysis years were consistent with the Hospital Study.
- ❖ Traffic analysis was performed for the following scenarios for AM and PM peak conditions:
  - 2008 Base (incl. Hospital Phase 1)
  - 2018 No-Build (incl. Hospital Phases 1&2, existing development @ station)
  - 2018 Build (incl. Hospital Phases 1&2 plus full build-out of Master Plan)
  - 2018 Build with improved circulation around Lot 7
  - 2018 Build with roadway improvements at Summit Grove

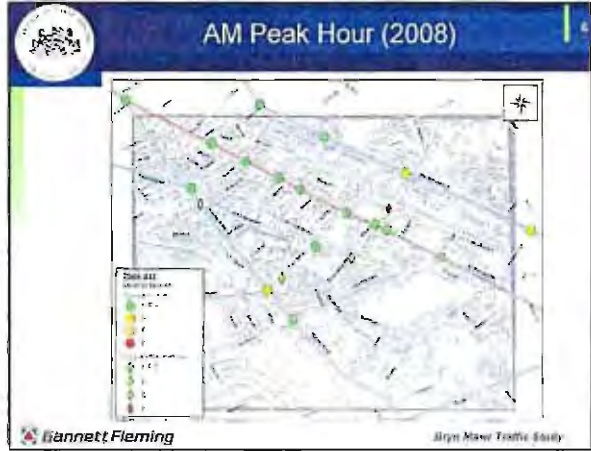
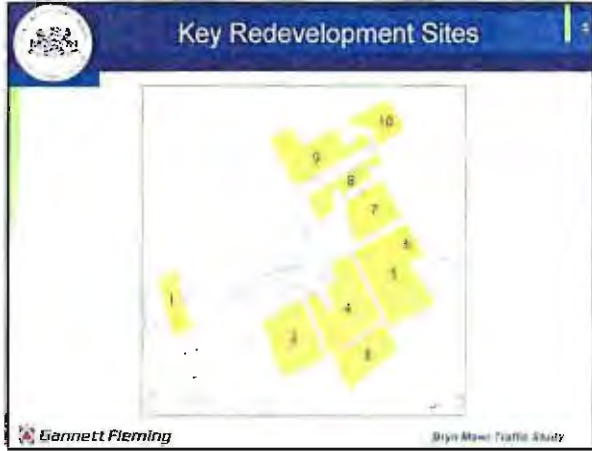
Bryn Mawr Traffic Study

## Assumptions

- ❖ 2018 no-build analysis based on a background traffic growth rate of 1% annually, in addition to traffic generated from the Hospital Study.
- ❖ Traffic associated with the Master Plan analysis was based on the proposed land uses, using appropriate trip rates from the ITE Trip Generation Manual.
- ❖ Passby traffic accounted for using standard ITE methodologies.
- ❖ Estimation of transit riders and users of other non-motorized modes were based on the best sources currently available including:
  - FHWA's Transit Cooperative Research Program (TCRP) Report 95: Land Use and Site Design: Transit-Oriented Development
  - The Case for Transit Villages by Roben Convero
- ❖ Trip Distribution assumptions were developed utilizing existing peak hour traffic volumes and the Bryn Mawr Hospital Study in coordination with the Township Engineer.

Bryn Mawr Traffic Study





**FINDINGS**

PM Peak Hour



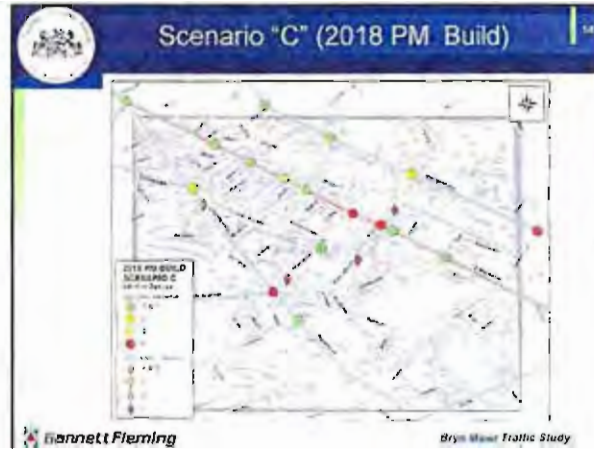


**Master Plan Roadway Improvements**

The following scenario was tested as part of the improvements derived from the Bryn Mawr Master Plan:

**Scenario "C":** Improve traffic flow by introducing a Counter-Clockwise circulation pattern around Lot 7.

*Gannett Fleming* Bryn Mawr Traffic Study



**"Mitigation" Scenario**

- ❖ Same assumptions as in Scenario "C" with the following refinements:
  - Elimination of left turns from Lancaster Ave. westbound onto Elliot Street and Bryn Mawr Avenue and reassign to County Line Road
  - This also removes through trips on Bryn Mawr Avenue through Five Points
  - Reduce left turns onto Morris Avenue and reassign to Roberts Road

*Gannett Fleming* Bryn Mawr Traffic Study





## Conclusions

- ❖ Traffic created by the Master Plan development can be handled by the existing network with some minor changes to traffic patterns
- ❖ These changes do not adversely affect pedestrian crossings

## **Ad Hoc Bryn Mawr Committee**

**Thursday, December 13, 2007 at 5:00 PM**

### **Meeting Notes**

#### **Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Charles Bloom  
Vince DiCioccio  
Andrea Gilbert  
JoAnn Magnetta  
Pat Wesley  
Hank Wilson

#### **Guests:**

Jerry Berenson, Bryn Mawr College  
Rich Bickel, DVRPC  
David Fogel, Septa  
Brian O'Leary, Montgomery County Planning Commission  
Holly Mager, Montgomery County Planning Commission

#### **Staff in Attendance:**

Angela Murray  
Bob Duncan  
Eric Persson

#### **1. Report from the Chairman**

Commissioner Scott Zelov reported that Committee member Mike Fanning passed away on the day after our last meeting, November 16, 2007. Scott remembered Mike as a dedicated Committee member who always had insight as well as an interesting view of changes coming to Bryn Mawr. He loved Bryn Mawr and was respected by all who worked with him. Scott asked to have a moment of silence in Mike's honor.

Scott encouraged everyone to shop locally in Bryn Mawr and announced that there were two new stores. Tiger Allie is an up-scale children's clothing store that had already opened and Ashton White, a home furnishings store now located in Wayne, would be opening on Lancaster Avenue in January. Township retail recruiter Heidi Tixjan had worked for many months to encourage the owner of Ashton White to relocate to the Township.

#### **2. Presentation of Bryn Mawr Traffic Study Report by Sue Gibbons of Gannett Fleming**

Sue Gibbons reported that the traffic study analysis was completed but for fine tuning and review by staff. She presented a power point that followed upon the information presented at the

previous meeting in response to questions raised by committee members. The first few slides reviewed the basis for the analysis including the use of Synchro traffic modeling software. Although they were provided the model created by the Bryn Mawr Hospital's traffic consultants, Gannett Fleming built their own model since the area of study was broader than that studied by the hospital. Sue reminded the committee that the basis for the build-out analysis was the Bryn Mawr Master Plan developed by Sasaki Architects. The year 2018 was used as the build-out year and includes the approved Bryn Mawr Hospital projects as well as the Master Plan redevelopment. As typically allowed by PADOT for built-out inner-suburbs, a 1% annual growth rate was applied to the no build-out analysis. Sue reviewed the sources used for the analysis and noted that the trip distribution was extended to all roads throughout Bryn Mawr. The analysis was reviewed by the traffic engineers from Pennoni Associates, Township Engineers, and by Gannett Fleming engineers who are familiar with the area.

Sue reported that today the traffic is working pretty well other than the "Five-Points" intersection that will undergo improvement as part of the hospital expansion project approval. The intersection of Pennswood Road and Montgomery Avenue is failing, but the closed loop system slated for installation on Montgomery Avenue scheduled to start in spring 2008 should help the operation of this intersection.

The presentation included an analysis of ten sites in Bryn Mawr that were suggested for redevelopment in the Master Plan. The analysis included a table that quantified current as well as build-out trips resulting in a net gain or loss for trips generated. It was noted that Lot 7 showed 0 current trips and it was agreed that this error would be corrected. A concern was expressed that there should be more trips quantified for the hospital, but the model was built to include the planned traffic improvements and the approved new buildings.

The presentation proceeded with analysis of several of the traffic improvements suggested by Sasaki in the Master Plan. These include the counter clockwise circulation around Lot 7, the "Tango Tangle" intersection, and the new street that would tie Summit Grove Avenue and the Bryn Mawr Film Institute to Bryn Mawr Avenue. These improvements were placed into the model and found to be beneficial improvements to the area.

A proposed traffic redesign of the streets surrounding Lot 7 was shown and included reorganization of the Tango intersection including closing the existing entrance, providing additional green area and improved parking design, and tying to the adjacent parking lot and driveway; a green pedestrian refuge at the intersection leading to the station; a right turn only coming southbound through the Morris Avenue underpass, a one-way northbound either going straight through the underpass or turning left around Lot 7; reorganization of Morris Avenue leading from the Bryn Mawr Septa station to Montgomery Avenue including a median, dedicated lanes, pedestrian improvements to the stop at the intersection and leading into the station area; pedestrian improvements at the intersection of Lancaster and Elliott Avenues.

Several types of improvements for pedestrian crossings at various locations were discussed with particular emphasis on the crossing along Morris Avenue where cars enter and leave the underpass as well as the entrance to the station area. Suggestions include new stop signs, flashing lighted crosswalks, rumble strips, pedestrian crossing signs, and acoustic warning signs for sight impaired individuals. Sue noted that many signalized intersections in England now include both visual and acoustic warnings for pedestrians. It was agreed that these suggestions would be added to the final traffic report and a copy provided to Police Superintendent Daley for his consideration.

Sue discussed their analysis of the conflict presented by the Baldwin School gateway entrance at the corner of Morris and Montgomery Avenues. Regularizing that intersection was studied as a way to promote a safer pedestrian crossing and automobile turns. However, staff did not think it realistic to pursue a design for this option given the historic nature of the Baldwin School property and the location of the existing driveway through the campus.

The next improvement reviewed was the intersection of Bryn Mawr Avenue and Lancaster Road adjoining the Ludington Library. The Master Plan recommended that the intersection be regularized and the free right turn heading northbound and then east would be removed. The intersection was modeled as it works today with a four way stop operating at an acceptable level of "D." A normal turning radius would be installed, the sidewalk extended and green space added. With the planning work now moving ahead for expansion of the Library, this improvement could be a help to Ludington as their design work proceeds.

Commissioner Zelov requested that similar treatments to those recommended for the Anderson Avenue Underpass in Ardmore be suggested for the Morris Avenue Underpass. These would include replacement of sidewalks, improved lighting, cleaning of the interior walls and correcting leakage from the railway onto the roadway and sidewalks. Pedestrian improvements coming to and from the underpass would be included in the recommendations.

The report and its recommendations were well received by the committee. The analysis concluded that traffic created by the Master Plan can be accommodated by the existing network with minor changes to traffic patterns. The proposed changes do not adversely affect the pedestrian crossings and many would be enhanced by implementing recommended improvements. The improvements include reconfiguration of the "Tango Tangle" intersection and traffic flow changes around Lot 7, improvements to the north Bryn Mawr station area and Morris Avenue and the underpass, and improvements to the Ludington Library corner at Bryn Mawr and Lancaster Avenues. The report will be reviewed by staff and made available to the members as well as to the Board of Commissioners in early January.

### 3. Bryn Mawr Zoning Issues

Scott noted that the most recent zoning outline contained the changes that were agreed upon by the committee at the last meeting. After meeting with the Bryn Mawr Civic Association on Monday night where the suggested changes were discussed, there were some additional concerns expressed. Thus, additional changes have been suggested regarding: limits to allowing 80% impervious surface on Lot 7; two alternatives to limit development in the V2; deleting private clubs and fraternal organizations from allowable uses; and a 10 foot build-to line to allow for sufficient sidewalks and street trees with an increase to 12 feet on Lancaster and Bryn Mawr Avenues.

There was discussion of the changes to allowable uses in the V3 area requested by Bryn Mawr Hospital at the last meeting. Additional conference calls have been held with hospital representatives regarding their concerns for limited density in the area. The hospital has completed calculations regarding the difficulty of meeting storm water requirements on the site and thus reducing their ability to build a garage surrounded by housing or to build underground parking and take advantage of the density bonus. It was agreed that hospital staff and Township staff would set up a meeting to review the information and report back to the committee on these concerns.

Montgomery County Planning staff Brian O'Leary and Holly Mager discussed the Greening

Standards suggested in the County Town Center Model Ordinance. After prior discussion with Commissioner Zelov, Holly prepared a version that was more geared to the Bryn Mawr area. Additional greening elements were focused upon rather than hardscape elements. The point system was reviewed noting differentiation for building additions and alternations versus new construction. It was agreed that staff would review the standards and incorporate them into the next draft of the zoning outline.

Scott asked the committee for their support of the proposed zoning pending discussion with the hospital about their concerns for the V3 district. All agreed that it was time to bring the proposal forward for public discussion and for review by the Board of Commissioners. The earliest that a presentation could occur would be January 9<sup>th</sup>, but it was possible that it would be February 13<sup>th</sup> given the already lengthy Building & Planning Committee agenda. Once an updated draft of the zoning outline is prepared in the next few weeks, it will be circulated to the committee.

#### 4. Student Housing Zoning Amendment

Bob Duncan reviewed the changes to the R-7 Zoning District that are proposed for review and adoption by the Board of Commissioners. The Township has been working with Bryn Mawr College to address their needs for additional student housing. The college is considering leasing apartment units in a nearby building that would help them to meet the growing demand for student residences.

The changes to the ordinance would limit the number of units within a building to no more than 40% of the units and no more than 3 students in a unit. A separation requirement is imposed between buildings and the building must be within 750 feet of the school. Parking for students will be provided on campus freeing up parking on local streets. This amendment is due to come forward to the Commissioners for discussion in January.

#### 5. New Business

The next meeting of the Ad Hoc Bryn Mawr Committee will be on Thursday January 17, 2008 at 5:00 PM in the Caucus Room. An agenda will be sent out prior to the meeting. Commissioner Zelov wished all a happy and healthy holiday season and New Year.



**Ad Hoc Bryn Mawr Committee**

**Thursday, January 17, 2008, 5:00 – 6:30 PM**

**Meeting Notes**

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Charles Bloom  
Andrea Gilbert  
JoAnn Magnetta  
Pat Wesley  
Mike Weilbacher  
Hank Wilson

**Guests:**

Devon Cheshire, Trammel Crow  
Richard Bickel, DVRPC

**Staff in Attendance:**

Angela Murray  
Bob Duncan  
Pat Ryan

**1. Report from the Chairman**

Commissioner Scott Zelov wished everyone a Happy New Year and reported that the Bryn Mawr Village Zoning District will be presented to the public at a meeting on January 23<sup>rd</sup> starting at 8:00 PM. There will be a question and answer period that will extend as long as necessary. Although it was hoped that the Ordinance could come forward to the Board of Commissioners in February, it is likely to be authorized for public hearing in March with the public hearing scheduled for April. Scott requested the members of the Committee be in attendance on January 23<sup>rd</sup> to show their support for the project.

One of the recommendations in the Master Plan was for the expansion of Ludington Library. This project has begun to be publicly discussed by the Board of Commissioners with the approval of Vitetta Architects to complete the design. Charlie Bloom is the Chairman of the Library Foundation and has been encouraging the Library to work closely with the business community. Ludington has an average of 3,000 people per day coming through the Library.

**2. Bryn Mawr Zoning Issues – Schedule for Zoning Public & BOC Approval Meetings**

Scott made note of the recent application submitted by Citizens Bank for the reuse of the Dunkin Donuts site. Rather than redeveloping the site, they plan to reuse the building continuing an unattractive site design with difficult access. This is an example of where having the new zoning in place would have required the building to be more appropriately sited and designed with improved vehicular and pedestrian access.

Bob Duncan reviewed the most recent map with the proposed rezoned areas extended along Lancaster Avenue to Rosemont. Most of the area will include extension of the V4 buffer, but some areas will be V3. On the south side of Lancaster Avenue, the zoning runs along property lines where feasible or in a straight line point to point. This map will replace the one used previously in the outline and will be placed on the Township website. Scott noted that the traffic presentation has now been placed on the website and that there will be a new Township website unveiled in the next two weeks making it easier to navigate.

Bob reviewed changes in the outline that were agreed upon at the prior meeting as well as other refinements resulting from discussions with the Township Solicitor including the section on historic preservation standards and demolition of property. Standards for conditional use were added and bulk and area standards from the CL Commercial district were incorporated and refined. A question was raised regarding undertaking a building by building review of the historic status of all buildings in the district as well as in the Township. This issue should be resolved outside of the effort to move the zoning forward for adoption.

The Greening Standards recommended by Montgomery County have been incorporated and refined. Additional refinements will be needed regarding the amount of area a green roof would occupy on a given building and storm water management must be determined. Some percentage less than 100% should be considered for a green roof, but more research needs to be done to determine what is appropriate.

The bonus chart table was reviewed noting that Bryn Mawr Hospital representatives had concerns about the 15 foot step back provision in the V3. Scott explained that a number of meetings and conference calls had been held between Township staff and the Hospital representatives to discuss their concerns with the proposed regulations in the V3, most particularly height and the difficulty of locating storm water recharge on site. Their concern is with the limitations in the proposed language and their interest in providing parking that is wrapped with other uses.

Devon Cheshire reviewed a height and view study utilizing the plan envisioned in the Bryn Mawr Master Plan and completed for the hospital that graphically defines the impact of the step back on the liner building as well as on the garage. He noted that the plan indicated that continuing the height of the liner building to a full four stories without the step back prevents the garage from being viewed by pedestrians at the street level. The Hospital believes the garage should be built to provide additional parking support for businesses, retailers, the theater and others in addition to providing required parking for the hospital and residences or other uses. The Master Plan contemplated a shared parking garage on this site rather than for supporting only the MOB and on-site uses.

The hospital requested the support of the Committee for increased height to five stories for the parking garage and consideration for additional bonus features. Bob Duncan proposed that the height of the garage be 55 feet with a liner building and the Committee agreed with this recommendation.

### **3. New Items**

The next meeting will be held on Thursday February 21, 2008 at 5:00 PM in the Caucus Room of the Township Administration Building. The meeting will include an unsolicited presentation by Keating Partners of a conceptual site plan for Municipal Lot 7.

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, February 21, 2008, 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members:**

Commissioner Scott Zelov, Chair  
Susan Arizini  
Charles Bloom  
Vincent DiCioccio  
Andrea Gilbert  
JoAnn Magnatta  
Jerry Berenson  
Pat Wesley  
Hank Wilson

**Staff:**

Bob Duncan  
Angela Murray  
Eric Persson

**Guests:**

Devon Cheshire

**Meeting Notes**

1. Report from the Chairman

Commissioner Zelov reported that the Merion Avenue Bridge will open tomorrow morning at 8:30 with a ribbon cutting. In case of snow, the ribbon cutting will be followed by a reception at the Bryn Mawr Fire House. There were still workers putting finishing touches on the bridge today.

At their meeting the previous evening, the Board of Commissioners approved an amendment to the R7 zoning requirements to permit student occupancy for up to 40 students (20 units) in an apartment building as long as the units are leased or owned by a college or university. This would likely apply only to Bryn Mawr College since the units must be within 700 feet of a campus and separated by a minimum of 1500 feet from another student use. Because of these limitations, this use could only be located on the south side of Montgomery Avenue. There would be no more than two students per unit,

a requirement for two parking spaces per unit and only 40 % of building can be occupied by students.

Scott announced that the scheduled presentation by Keating Builders of a concept plan for Lot 7 was removed from the agenda. The concept would consist of elevations and drawings that are close to the current zoning. Some committee members did not want to see proposals from developers at this point in the process.

## 2. Bryn Mawr Zoning Issues – revised Village District Zoning Ordinance

Tonight's meeting will be the final committee meeting on the zoning proposal prior to it being placed on the Building & Planning Committee agenda on March 12<sup>th</sup> for authorization by the Board of Commissioners to hold a public hearing in April. The public meeting on January 23<sup>rd</sup> was well attended and public comment was generally supportive. Many comments have been received from Commissioners who are very supportive of the rezoning.

The public hearing process will begin in April and if Commissioners are ready, a vote will be taken in May. Bob & Angela met with the Township Solicitor to review the Ordinance and address any legal concerns. At the next meeting of the Building and Planning Committee on March 12<sup>th</sup>, Bob will make a presentation and ask for the Board's approval to advertise for a public hearing.

Two different Ordinances will be required for the rezoning. Since a map change is obligatory, the legal description will be its own Ordinance. The other Ordinance will contain the zoning based on the outline that the Committee has been working from.

Bob reviewed his most recent memo outlining changes to the document in response to public comment received including comments from Baker Properties and Bryn Mawr Hospital. The Committee and staff have had continuing meetings with the hospital staff and consultants to discuss the height of the garage and wrapping the exterior.

A suggestion to change the existing residential districts that are zoned C2 commercial to R6 rather than R6A was approved and that does not permit apartment buildings. Thus, for example, R6 would insure against building an apartment structure on Markee Terrace where there are now predominantly row homes, and insure the continuing character of the street. The major differences are in the uses rather than dimensional requirements.

Baker Properties raised a concern about the 12,000 SF limit per floor for retail uses that could impact their properties and perhaps Rosemont Plaza. Steve Bajus, the owner of Rosemont Plaza and other large properties was contacted to secure his input regarding potential impacts to Rosemont Plaza. His response was that it would reduce the number and variety of tenants potentially able to locate in the center. Commissioner Phil Rosenzweig raised the issue about Rosemont initially rather than the property owner. Thus, a change was made to tie the amount of square footage to the lot area so that going

above a certain threshold would allow for an increase. For example, an 80,000 SF lot could increase to a maximum of 20,000 SF. This would start from a base lot of 75,000 SF.

The departure of Barnes & Noble was discussed with Baker Properties who own the property and who explained that it was a corporate decision on the part of Barnes and Noble. The property was kept on the market for a long period of time in order to find the right tenant. Unfortunately, due to the two floor configuration there were few tenants willing to locate there. Although our zoning was not responsible for that decision, tying the increase to the size of the lot makes sense and would provide flexibility.

Bob recommended deleting "Institutional Staff Housing" as a permitted use to address concerns raised about any confusion with student housing. Hospital staff responded that they would not develop anything other than the same apartment function that exists now for hospital employees.

A question was raised about the status of the Sunoco gas station. Bob explained that as an existing use, the property could become another station as long as there is not an intervening abandonment of the use. Once changed to something else, the use loses its nonconforming status.

A request was made to clarify the types of affordable uses available for the bonus FAR increases in Section 6. A Commissioners Ad Hoc Affordable Housing Committee is meeting to develop common definitions for affordable and moderate income housing for the zoning code. Since the goal is to have uniform definitions for affordable and moderate income housing, this section will be held in reserve. The benefit to waiting is to have the best thinking coming from staff and consultant research in this area. The key will be to determine the size of density bonus needed to encourage the use.

A question was raised as to the minimum number or percentage of spaces that trigger the bonus for underground parking. A suggestion was made to add storm water retention as part of an underground level to qualify for this bonus. It was also suggested that storm water be allowed some flexibility so that both uses could take advantage of the bonus. This idea should be available to any garage in the BVD and not just in the V3 area.

Another question was raised as to how much of a roof should be green to qualify for the bonus. As a relatively new and rapidly changing concept, we suggest leaving this question for determination during the land development process rather than specifying an arbitrary number in the zoning code. If planning staff does not feel there is enough to qualify for the bonus, the application can be denied or modified. In many cases, the Township might want to encourage a sloped roof for aesthetics and have a less green roof.

Garage height in the V3 was previously increased to 55 feet from 50 to allow five stories wrapped on three sides with residential. The hospital has expressed their need to go higher. Bob completed a parking analysis of the hospital's required parking for their

expansion. The hospital has requested up to 59 feet to allow for more flexibility. Both staffs will meet again to review each others analysis to justify the need for additional parking as well as an additional level.

Lower Merion Township parking requirements in the BMMD is 3.33 parking spaces per SF which does not account for displaced existing parking. Thus, although the required parking will fit into garage capacity, the displaced parking is not accounted for. The difference is between 100 and 130 spaces. At 55 feet, Bryn Mawr Hospital does not believe that the garage meets the required parking for the buildings and displaced parking. This is the basis for the request to build up to 59 feet with five levels above ground and that allows the floors to align with the wrapped structure. The wrapping will prevent viewing of the structure at 59 feet. The hospital is further concerned that the loss of the displaced parking spaces once surface lots are gone will result in traffic generation in the neighborhood. The hospital would have to continue to remotely park and shuttle staff to the hospital.

The hospital's development consultants showed a graphic description of the garage in section at 59 and 55 feet with 140 to 155 spaces per level. The top drawing shows shared levels between the wrapped structure and the garage. The second drawing shows unaligned floors and the impact on vertical circulation. The wrap building could be a multilevel apartment, condo or commercial or anything other than a townhouse. A townhouse would require separation between both structures. The graphic shows that a pedestrian would be inside the hospital building before seeing the front of the building at the site lines. Scott asked the members to think about the garage height discussion, exchange e-mails or have a conference call to work this out.

There was discussion about not limiting the liner building use to residential that would also allow for fluctuations in the market. A suggestion was made to allow commercial on the ground level particularly with apartments or condominiums above. The neighborhood had been residential and some believe it should be residential when redeveloped, but this would almost dictate that the use be townhomes since it is difficult to place flats on the ground level. Guaranteeing residential would bring back a neighborhood and provide needed pedestrian activity feet on the street and density near transit.

Bob noted that the required parking will limit the site to residential being included in what is developed. The request is to meet demand, provide for vertical circulation and provide the number of spaces needed. The hospital's consultant suggested a compromise of a three story frontage and 10 foot step back that creates a three story street wall on Summit Grove Avenue. Concern was expressed whether Central Avenue will be able to continue as a street. The Master Plan suggests that it will, but the area is limited.

Some additional changes are proposed in response to Baker Properties concerns. If CVS left, the building would be split into several storefronts to meet the proposed requirements. Bob proposes that in the V3 where a building has frontage on Lancaster Avenue but sits 150' back from the street, hat office uses be allowed on the first level.

Additional changes were suggested for signage based on lot width at the building line that should establish where the measurement should be. Staff suggests that the signage requirement for a second floor tenant is sufficient as stated. Other signage provisions are in the signage section of the zoning code and need not be repeated.

Baker also questioned the requirement for common elements for awnings arguing that there should be an allowance for creativity. Scott suggested members review the rest of the minor comments and provide any further comment directly to staff.

Bob noted that buffer requirements were added from the MUST under part G. A 10 foot buffer would be required where commercial abuts residential.

### 3. Schedule for BOC Zoning Approval Meetings

The Board of Commissioner's will consider the Bryn Mawr Village District Zone at the Building & Planning Committee meeting to be held on Wednesday March 12, 2008 at approximately 6:45 PM.

### 4. New Items

The next meeting of the committee will take place on March 20<sup>th</sup> at 5:00 PM. Mac Nichols from Economics Research Associates will be present to present updated information on the proposed TRID district.



**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, March 20, 2008 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members Present:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Vincent DiCioccio  
Andrea Gilbert  
JoAnn Magnatta  
Jerry Berenson  
Mike Weilbacher  
Pat Wesley  
Hank Wilson

**Staff Present:**

Bob Duncan  
Angela Murray

**Agenda**

1. Report from the Chairman

Scott expressed thanks to the members for attending on the night before the holiday weekend. Scott noted that the meeting will commence with continued discussion on the proposed zoning and transition to the TRID value capture analysis. Mac Nichols from Economics Research Associates was present to provide updated data on the TRID analysis.

Scott announced that Vitetta, the architects retained by the Library to design the expansion of Ludington Library and other library related projects, met with Angela who presented the Bryn Mawr Master Plan and Bryn Mawr Village Zoning District. The meeting was particularly helpful to both the architects and Library staff since it came before beginning planning meetings with the Ludington Board in preparation for the expansion.

Scott plans to propose including civic association members in the review of plans for the Library expansion. He also planned to send out the dates for the design charettes so that both civic and business association members will be aware of the time and place for public and community participation.

## 2. Bryn Mawr Village District Zoning Ordinance Update

Scott provided an update on the Board of Commissioners meeting held Wednesday, March 12, 2008 where Bob presented the Ordinance proposal and received public comment & commissioner comment. It was clear that there was further need for legal review of the ordinance and he and staff are continuing to work with Gilbert High, the Township Solicitor to prepare and change language that may not be clear or not compatible with the rest of code. Commissioner Liz Rogan also wanted time to review and has also met with the Township and staff on the Ordinance. There is still more work to do on signage to be sure it is compatible with other Code regulations. While some changes were made to reflect the intent of the district, they were not material or substantive.

A schedule was agreed to by the Commissioners after public comment reinforced the need for further discussion with the Bryn Mawr Civic at their meeting on Monday March 17<sup>th</sup>, 2008. Bob did a great job of presenting data updated since January. Although the group was small, they were those most interested in the zoning. Discussion centered on height of the garage and other uses in V3. In order to achieve a garage height of 55 feet, those present wanted the garage wrapped in residential although the hospital has asked to allow for a mixed-use with retail or commercial. The minimum and maximum floor area for retail was also discussed and provided people who gave public comment to the Commissioners on Wednesday night the ability to discuss the issues again with community members.

On Wednesday April 2<sup>nd</sup>, a public hearing will be held to authorize advertising the Bryn Mawr Village District Ordinance with intent to adopt on May 7<sup>th</sup> or 14<sup>th</sup>. A mailing will go out to several hundred residents and business owners whose property will be subject to the rezoning. For the second public hearing, a more formal mailing more than 30 days in advance will include a letter to the noted group as well as to all property owners within 500 feet of the district. Each property will be physically posted and must remain so throughout the hearing period. The public hearing can result in a vote by the Commissioners or they can choose to hold the hearing open and continue to another date.

On April 7<sup>th</sup>, the Ordinance will be presented to the Lower Merion Township Planning Commission at their monthly meeting. The overall proposal was introduced to the Planning Commission at their March meeting where some members expressed their interest in Lot 7 remaining a town green. It was explained that in order for redevelopment to occur whether as a green space or as proposed in the Master Plan, the Township would have to build a parking garage elsewhere to accommodate public parking as required by the terms of the agreement with the former Pennsylvania Railroad

for the property. The Bryn Mawr Master Plan proposes a town center with green space and plaza incorporated into the design.

After the Township authorizes the Ordinance for Public Hearing, it will be sent to the Montgomery County Planning Commission for staff review and written comments. The Township Planning Commission thought that it was a “big plus” to the rezoning process that the Ad Hoc Committee went through such an extensive process and were comfortable that there had been significant process and public comment.

Bob Duncan reviewed what Ordinance sections had changed since the last meeting. He noted that the section on prohibited uses had been deleted since the Commissioners did not want it to appear that certain uses were allowed in other areas of the Township, but not in Bryn Mawr. The Township will be developing new legislation to limit prohibited uses such as massage parlors that will be applicable in certain areas in the Township. Other such uses could include some categories that are permitted now such as gambling, adult entertainment and check cashing.

The provision for affordable housing has been removed but the section reserved. The Ad Hoc Affordable Housing Committee chaired by Maryam Phillips and on which Scott Zelov is a member are meeting to establish common language that can be consistent and uniformly applicable throughout the Lower Merion Zoning Code.

Some commercial property owners such as Baker Properties have come forward with concerns but have not spoken at public meetings. The Grossman Brothers who own Baker Properties have raised concerns about uses & signage. In response, some changes were made to design standards for signage and some for usage. One example of their concern was for the signage for the multiple uses in the Bertucci’s strip center as well as for uses located in the Town Place development where the Ordinance would have limited uses at ground level for retail and not office. The change made requires that retail be required within the first 50 feet from the street line. In the office area to the rear of the property, there would be flexibility to rent to retail, but it is not mandatory.

There was concern expressed about their Staples property since if Staples closed, it might be difficult for them to get a single tenant of that size. Thus, the space facing Lancaster Avenue would be required to have a front door as well as signage, but the interior space if subdivided and facing the parking lot would have entrances facing the lot as well as separate signage. These uses and configurations are not typical for Bryn Mawr other than in this district and further west in Rosemont.

One additional request from Baker was for a modification to allow signage to face the parking lot such as at Bertucci’s. In addition, Baker wanted second floor signage for second floor tenants, which was agreed to but limited if the same tenant also occupies first floor. On the issue of replacement signage for new tenants, a provision was added for an alternative for the Commissioners to consider allowing for replacement signage above 20 feet. The Zoning Code makes it difficult to replace signage once it has been removed. Bob provided the example of the Silver & Silver building in Ardmore where

there is a sign mounted across the top of the building, but the sign is attractive and uses pin mounted letters. Thus, the Ordinance would allow flush mounted signs up to 20 feet that would be designed to accommodate the first floor and just above the windows on the second floor.

Baker Properties requested an increase allowing for up additional square footage on ground level. The original proposal allowed for a 12,000 SF maximum on one level that has been increased to 13,000 SF because the Staples building is an existing conditions that would remain code compliant. There was no provision for free standing or monument signs. This was changed to allow replacement of free standing signs only if the existing obstructs traffic and is a safety concern.

The Township Solicitor suggested that the greening standards be placed in the Land Development Code rather than the Bryn Mawr Village District Code making the standards easier to enforce. To the degree any waiver was needed, such request would not go to the Zoning Hearing Board but to the Commissioners with staff recommendation. Additionally, staff would come up with alternative plantings or suggestions that could be considered. If it were to remain in the Zoning Code, any change would have to go to the Zoning Hearing Board that is an expensive and long drawn out process where a variance would be the only resolution and difficult to get since hardship must be proven. Additionally, enforcement can be incorporated into the commercial inspector responsibilities. The standards will be referenced for compliance in the ordinance, but the heading will re-direct to Chapter 135 rather than Chapter 155.

Since these are the most extensive design standards to be adopted in Lower Merion Township, Gil is rewriting the introductory language to reflect that the purpose is to generate economic value for businesses and property owners. This is important to protect the Township from any potential legal challenge. Scott summarized that the Committee's work set a good example for the rest of the Township on public process and how to work with the community to achieve needed rezoning. The timing is right for this effort to move the Bryn Mawr Village forward into the future.

3. Presentation by Mac Nichols from Economics Research Associates on progress with TRID planning

Scott reminded the members that two grants were received to hire consultants to study establishing a TRID for Bryn Mawr. As work progressed after the Master Plan was completed, it made sense to focus on zoning to determine density and establish future benefits. Now that the work has been nearly completed for zoning, the Committee should transition itself to return to talking about the TRID for Bryn Mawr. TRID will provide funds based on increases in real estate values over time based on physical improvements made. For example, value from the hospital expansion will be important to capture to provide funds for public improvements. The garage under construction will jump in value and the TRID can capture this since the time frame for completion is September or

October. Scott proposed that the Committee shift their attention to the study of TRID and that future monthly meetings be used for this purpose.

A question was asked as to how TRID can be of advantage to the hospital. Mac explained that a more attractive streetscape would be of benefit with improved pedestrian access. The TRID is a financial structure for funding infrastructure, streetscape and transit related improvements. It is important to capture the new hospital development in order to have enough funds to complete the ideas suggested in the Master Plan. Because you can't predict which small properties will undertake improvements, the analysis focuses on large planned projects that would be desirable as proposed in the Master Plan.

It will be necessary to prioritize and justify which transit related improvements should be undertaken such as ADA accessibility to the station. The TRID legislation requires entering into cooperative agreements with Septa and Amtrak and that is why Septa staff has been participating in the Committee meetings. It will be to Septa's advantage to help increase ridership potential. The TRID can support development of Lot 7 by providing funds for a parking garage for commuters and for the traffic related improvements suggested in the traffic study such as the redesign of the "Tango Tangle" intersection. These improvements have broader value for everyone in the Village area.

Mac explained that he is now adjusting the original financial model to address any changes now that zoning has been defined and FAR can be calculated. Two scenarios were built into the financial model with the Township, Montgomery County and Lower Merion School District, and with Montgomery County and the Township only to understand funding under both scenarios. The model assumes that no residential and tax exempt properties are included. Using comparables, the model is very conservative since it is better to have a realistic understanding of the revenue stream and perhaps have more than what is planned for.

Over the next few weeks, Mac will revise the model to determine if the V1 zoning reduces revenue generation for Lot 7 compared to what was proposed in the Master Plan. The eventual funds may not be of an amount a municipality would use to back bonds, but would produce a stream of revenue to pay for improvements and provide maximum flexibility. Mac will be estimating the maximum by right development without bonuses with the exception of Lot 7.

The Verizon Lot will be modeled with the assumed maximum by right development. Mac will look at comparables on rents and values and make spreadsheet adjustments. He planned to ask Catherine to help with build-out scenarios for Central Avenue since the zoning proposed has the most significant change from the Master Plan. The original goal was for some of the Central Avenue area to be developed with affordable housing. The model does not provide a "pro forma" for all development throughout the proposed TRID district, but it would have to factor in rents that can come from affordable rather than condominiums or market rate housing.

The model includes all new developments proposed except north of the tracks.

The proposed parking garage on the Amtrak/Septa commuter lot provides a way for people to encourage use of rail and provide funding for ADA accessible requirements. We are all reminded that nothing can happen on Lot 7 without relocating commuter parking on the Septa lot.

Mac explained that the TRID Plan requires that certain elements be completed including a list of eligible projects such as traffic improvements, parking improvements, ADA accessible station upgrades, streetscape and pedestrian access-ways. The implementation structure would likely result in the Township being responsible for collecting the funds.

At a future meeting, likely in May, Mac will provide a completed economic analysis, a review of the numbers and an outline of the TRID plan.

The next meeting of the Ad Hoc Bryn Mawr Committee will take place on Thursday April 17, 2008 at 5:00 PM in the Caucus Room of the Township Administration Building.

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, April 17, 2008 5:00 – 7:00 PM**

**Township Administration Building  
Caucus Room**

**Members Present:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Charles Bloom  
Susan Arizini  
Jerry Berenson  
Mike Weilbacher  
Pat Wesley

**Guests Present:**

Devon Cheshire  
James Paradis

**Staff Present:**

Bob Duncan  
Eric Persson

**Agenda**

1. Report from the Chairman

Scott welcomed the group, and asked Eric Persson to give a brief update on Hayden Lane Improvements. Eric stated that the hardscaping is nearly complete, and that Bryn Mawr Beautiful is planning to complete the landscaping this weekend. The bollards are the final element to be delivered the week of April 23rd and should take less than a day to install.

2. Bryn Mawr Village District Zoning Ordinance Update

The April 9th ordinance draft has been posted on the Township's website.

The BOC reviewed the ordinance in detail on April 2<sup>nd</sup> and received public comment. The BOC finished the technical review during this meeting. The BOC unanimously approved the ordinance for public hearing on May 7th, with a number of changes that

were added as alternatives. The alternative of permitting retail in BMV3 along Central Avenue was removed. If the proposed garage measures 59 feet in height, then the three sides of the garage would be required to be wrapped with housing. There were two map changes made. The Planning Commission met on April 7th and made recommendations on the alternates and recommended approval of the ordinance to the BOC.

At the April 9th BOC meeting, the public hearing date was changed to May 14<sup>th</sup> from May 7<sup>th</sup>. Commissioner Scott Zelov added another alternate regarding the maximum number of parking spaces that could be shared by various uses. Although BMV3 zoning allows retail uses, R-6A does not. If the Hospital does not build the garage in the future, then it is unlikely that retail would be built. Since housing has the easiest parking standard to meet at 1.5 spaces per unit, the new shared parking alternate of ten spaces would make commercial extremely difficult to develop.

Members liked the lower maximum, but wanted to know what the practical impact of a shared parking limit would be to the other BMV3 areas. Because of this change, the ordinance will go back to the Planning Commission on May 12th. Bob Duncan expanded on the parking model of 1.5 residential spaces versus 4 spaces per 1,000 SF for retail. If ten spaces becomes the maximum for shared parking in the BMV3, the impact on future redevelopment should be understood. For example, when the Verizon Lot is redeveloped, it is most likely that all spaces would be on its own site rather than to need shared parking from elsewhere. In this case, Verizon would not be affected by the limit. The same could be true for other properties likely to be redeveloped in other BMV3 areas as well.

The Ordinance changes were then reviewed by the Committee:

Page 6 – Separation of Uses: Concern was expressed that too large an area between similar uses (range of 100-300 feet) is proposed. The 100 feet was suggested since this is similar to existing Ardmore Special Development District (ASSD) zoning. Bob was asked to comment on the ranges. Bob felt that if more than two of the same service businesses are on the same block, the retail flavor of the street would be compromised. The group suggested that 100 feet be the minimum for any one business on the list, but 300 feet for separation of the same business use. Bob will review this issue with the Solicitor to see if this change would require re-advertising of the ordinance. The group agreed that the separation language remain rather than re-advertise since doing so would slow down the process. Scott suggested the separation should be listed in the ordinance as 300 feet, and amended later to 100/300.

Page 8 – An issue raised by the Solicitor was how to permit a developer to proceed with installing green areas where the full standards cannot be met. The group agreed that a range of 70% would be sufficient since this is similar to the percentage in BMV2.

Page 10 – The buffer requirements section was added for commercial abutting residential, e.g. to provide protections for existing Central Avenue homes.



The alternative also relates to aligning the floor of the garage with the floors of adjoining residential units. The garage height of 59 feet would also enable enhanced fire and safety ingress/egress. This would encourage development of affordable housing since it would be more likely to be developed as flats with floors that align with the garage. In addition, the relationship of a wrapped building to the garage measurement should be based on R-O-W boundaries. The Committee did not reach consensus on this issue.

Page 15 – The Shared Parking Alternative was also discussed to consider the impact if a building such as the existing single story MRI use were demolished and redeveloped. The limited shared parking alternative would impact the redevelopment of this building. However, if the building was expanded without changing the first floor footprint, it would not be impacted. The group was supportive of 10 shared spaces pending review of parking calculations.

Page 21 – Signage alternate suggested by Baker Properties: Using the Bertucci's site as an example, Bob suggested and the Planning Commission recommended keeping the sign limit at a height of twenty feet since the only other building in the district to be impacted would be the Harry Ortlip Building. The Committee members were in agreement on this issue.

#### Map Changes:

The Committee supported the BMV3 change for Central Avenue. BMV4 on the north side of Lancaster Avenue was recommended for the existing eight homes. The current owner of six of the properties agreed to V4, but not to R6 to maintain existing property values. It was suggested that members drive by to review the site.

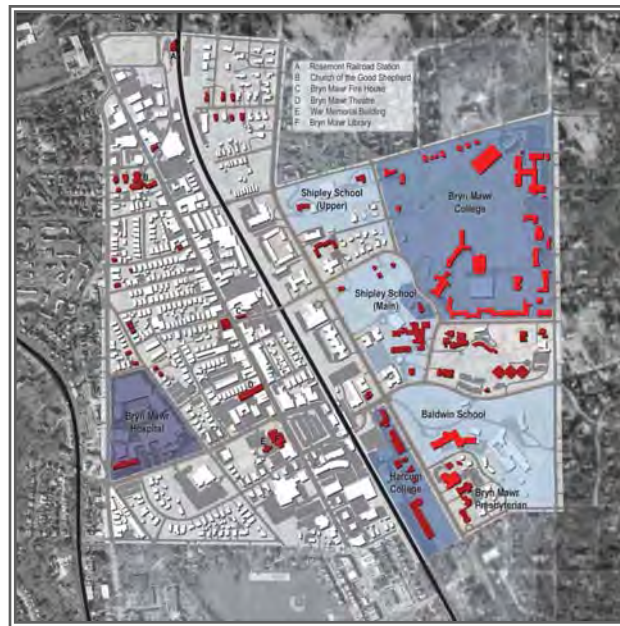
#### 3. Update on progress with TRID planning

The new hospital garage will open in the fall. If TRID is not enacted by that time, then the assessment increase in tax revenue on this property will be lost to TRID funding for public improvements. Mac Nichols will return in May to review the financial model calculations and determine if enough funds would be generated to make TRID practical.

The next meeting of the Ad Hoc Bryn Mawr Committee will take place on Thursday May 15, 2008 at 5:00 PM in the Caucus Room of the Township Administration Building.

# Bryn Mawr TRID Analysis

An analysis of real estate assessment value potentially available to be captured for TRID project funding



ERA

S A S A K I

CivicVisions

15 May 2008

# Assumptions

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## Financial Assumptions

- ▶ Lot 7 is assumed to be developed according to prioritized program in The Bryn Mawr Master Plan consistent with zoning decisions made and with density sufficient to execute the development program.
- ▶ Annual value increase of total TRID area properties assumed to be 3% (for inflation).
- ▶ Value planned and *assumed* development at:
  - Bryn Mawr Hospital according to development program
  - Lot 7
  - Central Avenue
  - Verizon lot

## Fiscal Assumptions

- ▶ Total Current Millage Rate: 24.452
  - County Rate: 2.695
  - LMT Rate: 3.61
  - School District Rate: 18.878
- ▶ “All-in” combined rate is assumed to include:
  - 80% of Township Millage
  - 80% of County Millage
  - 25% of School Millage
- ▶ Alternative: 80% Township; 80% County
- ▶ Township and County Millage Rate increased at 3% per year
- ▶ School Millage Rate increased annually at 5%

## Summary of Projected Revenues

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Total 20 year total TRID revenue (all taxes)	\$	68,692,863
Total 20 year baseline (all taxes)	\$	25,184,536
20-yr net funds (all taxes)	\$	20,389,125
20-yr LMT & County Total @ 80%	\$	32,680,130
20-yr LMT & County baseline	\$	12,931,318
<b>20-yr LMT &amp; County net TRID funds</b>	<b>\$</b>	<b>20,389,125</b>
w/o BMH Parking Phase 1	\$	19,574,058
<b>20-yr Cost of delayed adoption/ 1</b>	<b>\$</b>	<b>815,067</b>

1/ Assumes Parking 1 not included in TRID increment; no interest calculation

- If TRID not in place by time BMH Parking Structure 1 put in service, estimated \$815,067 will be placed into baseline and not available specifically for TRID projects.
- Time lag between completion of BMH Parking Structure 1 and other projects may be >1 year. If TRID delayed, may want to wait 6 months – year before starting TRID
- Estimates based on delivery assumptions for various projects.

## Potential TRID Projects

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- SEPTA/Amtrak parking structure
- Traffic improvements
  - Underpass & intersection
  - Bryn Mawr Avenue & Five Points
- Streetscape improvements
  - Bryn Mawr Avenue
  - Lancaster Avenue
  - Associated with Lot 7 redevelopment
- New street pattern associated with Central Avenue redevelopment
- Reconfiguration of Community Center park and parking

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, May 15, 2008, 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members Present:**

Commissioner Scott Zelov, Chair  
Susan Arizini  
Jerry Berenson  
Pat Wesley  
Hank Wilson  
Jim Paradis for Andrea Gilbert

**Staff:**

Bob Duncan  
Angela Murray

**Consultants:**

Mac Nichols-conference call

**MEETING NOTES**

1. Report from the Chairman-Commissioner Scott Zelov

The Chair thanked the members for their participation at the public hearing for the Bryn Mawr Master Plan held the previous evening at the Board of Commissioners meeting. The testimony was well received by the Commissioners who passed two of the three sections of the Map Ordinance.

Scott announced upcoming events:

Bryn Mawr Beautiful has hired a man to sweep and clean up sidewalks and maintain the hanging baskets.

There will be a ribbon cutting for Hayden Lane Friday, May 23rd at 10:00 AM.

On Saturday June 7<sup>th</sup> at 9 AM, the Township will hold the grand reopening of the Warner Avenue and County Line Road Playground.

On Thursday June 10<sup>th</sup> Bryn Mawr Hospital will host the ribbon cutting for Humphrey the Horse that is being permanently located in the Bryn Mawr Hospital main lobby. Mike Beck of the Township Public Works Department is assisting with managing the move of the horse.

On Monday May 19<sup>th</sup> at 7:00 PM at Ludington Library, residents may participate with the architects in considering design concepts for the expansion of Ludington Library.

Susan Arizini discussed the plans for the proposed Bryn Mawr Business Improvement District (BID). The Bryn Mawr Partnership plans for the future include holding focus groups and encouraging business owners to work together to better market and merchandise their stores. The next meeting to discuss the Business Improvement District will be held on June 18<sup>th</sup>.

Jerry Berenson announced that the new Bryn Mawr College President, Jane McAuliffe starts July 1<sup>st</sup>. This summer, the college will begin the renovation of Goodhart Hall that should provide a much improved space. The project is expected to be finished in September 2009. The next big project planned will be a small expansion of the gym on Roberts Road.

## 2. Bryn Mawr Village District Zoning Ordinance Update

Bob distributed updated maps showing the areas approved by the BOC and noted that additional map modifications may be the subject of amendments in the future. The Racket Club property had been a mill originally and will continue to be rezoned from commercial to BMV4. The Board approved Clarence Wolf's property as V4 rather than R6 and the corner of the Rosemont Plaza will be changed to V3 from proposed V4. The Board discussed several amendments to the Bryn Mawr Village Zoning Ordinance that requires re-advertising of the Ordinance. Another public hearing is scheduled for the June 18, 2008 Board of Commissioners meeting at approximately 8:00 PM.

Members commented that there were new residents, landlords and business owners present to speak at the meeting including the owner of Goodman Records & Radio and the new landlord on Elliott Avenue.

The members commented on Commissioner George Manos' discussion of the proposed garage height with Scott noting that the issue of garage height was not voted on by the BOC and will come up again at the June 18<sup>th</sup> meeting. George's view was that it was not necessary to match up the floors between apartments and garage decks. Fire safety considerations typically require vertical separation between habitable units and garages. However, if efficient design meant physically connecting buildings between the apartment floors and garage decks, residents would want the convenience of congruent floors. To compare height, the members discussed the estimated height of the Macy's building at Suburban Square as possibly comparable to what is proposed for the V3 Central Avenue area.

The members requested more information from Bryn Mawr Hospital on how the garage and adjoining building could be designed. Members are requesting this information to enable them to better understand why the hospital wants an additional garage deck and to enable the members to consider the option. The members would like examples of the types of buildings that are being suggested. Scott noted that now that the map is approved, the BOC can concentrate on the refinement of the remaining zoning issues.

A member suggested that Bryn Mawr Hospital consider what more they could do to make a gesture to the community by reaching out with an idea that can be considered as a contribution to the community. Right now, the feeling among neighbors seems to be that the hospital and the community are two separate entities.

Jim Paradis reported on behalf of the hospital that they are due to break ground on the approved medical office building in late spring. Members discussed their interest in limiting vacant space between the hospital and Lancaster Avenue. In the future, the expectation is that properties on

Summit Grove Avenue can be consolidated though some properties are still owned by private individuals. However, the hospital has to work with the Township to incorporate Municipal Parking Lot 10 into the project and to allow for sufficient parking.

Scott noted that since the Committee's next meeting will be on June 19<sup>th</sup> any further input on the garage will have to be before the public meeting on June 18<sup>th</sup>.

3. Discussion of TRID planning analysis via conference call with Mac Nichols

Mac discussed his recent analysis wherein he reviewed all the numbers and assumptions made previously including redevelopment of Municipal Lot 7, the hospital properties including garage, MOB and town homes and the Verizon Lot in agreement with proposed Bryn Mawr Village zoning. The analysis includes an increase for inflation of 3% annually. The fiscal assumptions used millage rates in two ways. The first includes the combined rates of the Township, Lower Merion School District and Montgomery County. The second and possibly more likely scenario would include the County and Township total millage should the School District decline to participate. The analysis includes increased millage rates of 3% per year which may not occur.

The summary sheet shows how much revenue can be generated over 20 years resulting in net TRID funds of about \$20M. If TRID was not adopted before the new hospital parking structure is completed and receives a Certificate of Occupancy and property assessment, cash flow would be reduced about \$40,000 per year over 20 years. Mac reviewed the spreadsheet noting that aggressive time lines were used for the build-out of Lot 7 with completion by the end of 2011. Also included in the projections is full build-out of hospital properties by 2013, varying delivery dates for Central Avenue and full build-out of the Verizon Lot by 2013 which may be too soon.

Reviewed less aggressively, if Central Avenue and Verizon have completed build-out by 2016, the result would generate a little over \$19M over 20 years. With debt coverage and discount of 5%, bond funding of approximately \$9.3 would be the most aggressive and \$.5M the least aggressive. The question then becomes how comfortable a bond insurer would be with these projections. The less aggressive redevelopment time line would result in \$19,154,000 over 20 years.

Without the hospital garage, the projection would be reduced to \$18.7M. The difference is the loss of about \$815,000 if the Township missed this window of opportunity. It would be almost two years before any revenue would be generated by future hospital development, late 2009. The recommendation would be to start the TRID earlier in order to capture the garage that is planned to come on line in mid-Fall. All numbers used were at net present value.

TRID funds would be supplemental to public grants for public improvements and infrastructure. Both the TRID District and the Bryn Mawr Master Plan establish priority projects for state funding. The county in Pittsburgh that has been studying TRID ended up deciding to use Tax Increment Financing because TRID was too difficult to complete in a multi-district area. If we did not have the hospital development, the numbers may not make a difference.

Mac explained that he developed an alternative spreadsheet with a "glass half-empty" viewpoint to provide a sense of range if the time lines seem too aggressive. Although it is a small difference in years, what we will do and when we will start redevelopment does become a big issue for cash flow. The Township will have to be realistic since it impacts the decision to use or not use revenue bonds given financing constraints.



Scott reviewed the final page of the hand-out listing cost estimates for public improvements recommended in the Bryn Mawr Master against the lowest cash flow number of \$18.M. The first four estimated projects totaled \$17.5M that would allow for a number of projects to be completed with TRID funding.

One committee member commented that the Central Avenue project that incorporates a new street between Bryn Mawr Avenue and the rear of the Bryn Mawr Theater will require a lot of encouragement for residents, businesses, the hospital and the Township to work together to come up with an appropriate outcome. Although there are two major property owners, the Hospital and the Township, there are still four individuals in the area. Although Central Avenue is an exciting project to consider, Lot 7 does present an opportunity that could progress more quickly. The worst case scenario would be that Lot 7 comes on line in 2013 and 2014

Other TRID requirements include agreements with the railroads, discussions with the Lower Merion School District and Montgomery County to determine their interest in participation. SEPTA has already shown their interest with providing a staff person to participate in TRID planning as well as to provide a letter of interest from the General Manager.

The redevelopment of Lot 7 would be the first project undertaken and would include, as part of the scope of work, replacement parking for commuters on the SEPTA lot. Such a plan would likely be of interest to SEPTA who is experiencing significant increases in ridership driven by the cost of gasoline for automobiles. Currently on Lot 7, there are 100 spaces for commuters, the public and the remaining users are the Post Office trucks. Once the development community becomes involved, their architects and designers often come up with solutions.

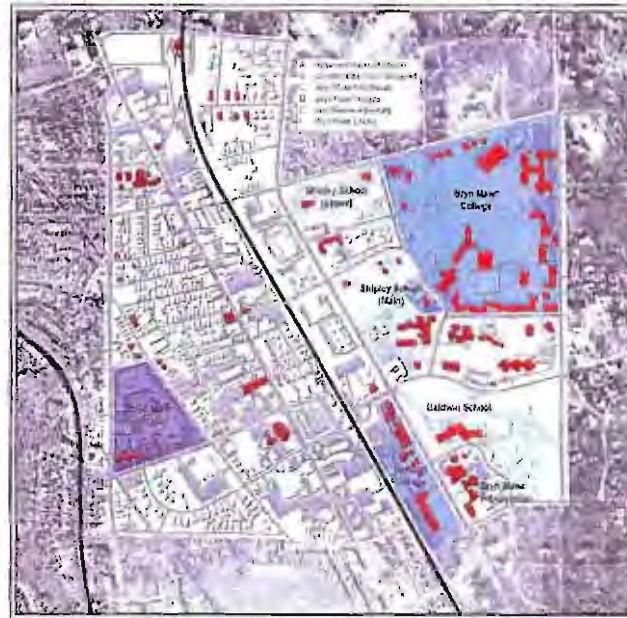
Mac will provide an alternative spreadsheet for Township staff review and establishment of priorities. Thereafter, Mac will assemble a final report and include financial elements. This information will be provided to the public in an open public process to secure community buy-in. One member continued to express concern about potential use of eminent domain by SEPTA and suggested that any agreement should include some understanding that there be limited use of eminent domain since the Township will be using tax money to fund public improvements. It was noted that TRID legislation does not provide SEPTA with any greater right to the use of eminent domain for transit purposes than exists today. In addition, the Township Solicitor provided a written opinion that TRID confers no greater rights to the use of eminent domain to SEPTA than exists today.

The committee found the list to be helpful with good numbers and agreed that a strategy will be important for the public process. The schedule will include a presentation by Mac at the June 19<sup>th</sup> Committee meeting with Rich Bickel from DVRPC and Dave Fogel from SEPTA present with the expectation that the Committee will make a decision to move ahead or not with TRID. For the public process, a public meeting will be held to present the concept and financial analysis to the BOC on September 10<sup>th</sup> or 16<sup>th</sup>.

The next meeting of the Ad Hoc Bryn Mawr Committee will be held on Thursday June 19, 2008 at 5:00 PM in the Caucus Room of the Township Administration Building.

# Bryn Mawr TRID Analysis

An analysis of real estate assessment value potentially available to be captured for TRID project funding



ERA

S A S A K I

Civic**Visions**

June 19, 2008

# Assumptions

## Financial Assumptions

- ▶ Lot 7 is assumed to be developed according to prioritized program in The Bryn Mawr Master Plan consistent with zoning decisions made and with density sufficient to execute the development program.
- ▶ Annual value increase of total TRID area properties assumed to be 3% (for inflation).
- ▶ Value planned and *assumed* development at:
  - Bryn Mawr Hospital according to development program
  - Lot 7 (100% in 2014)
  - Central Avenue (100% in 2013)
  - Verizon lot (100% in 2013)

## Fiscal Assumptions

- ▶ Total Current Millage Rate: 24.452
  - County Rate: 2.695
  - LMT Rate: 3.61
  - School District Rate: 18.878
- ▶ “All-in” combined rate is assumed to include:
  - 80% of Township Millage
  - 80% of County Millage
  - 25% of School Millage
- ▶ Alternative: 80% Township; 80% County
- ▶ Township and County Millage Rate increased at 3% per year
- ▶ School Millage Rate increased annually at 5%

## Summary of Projected Revenues

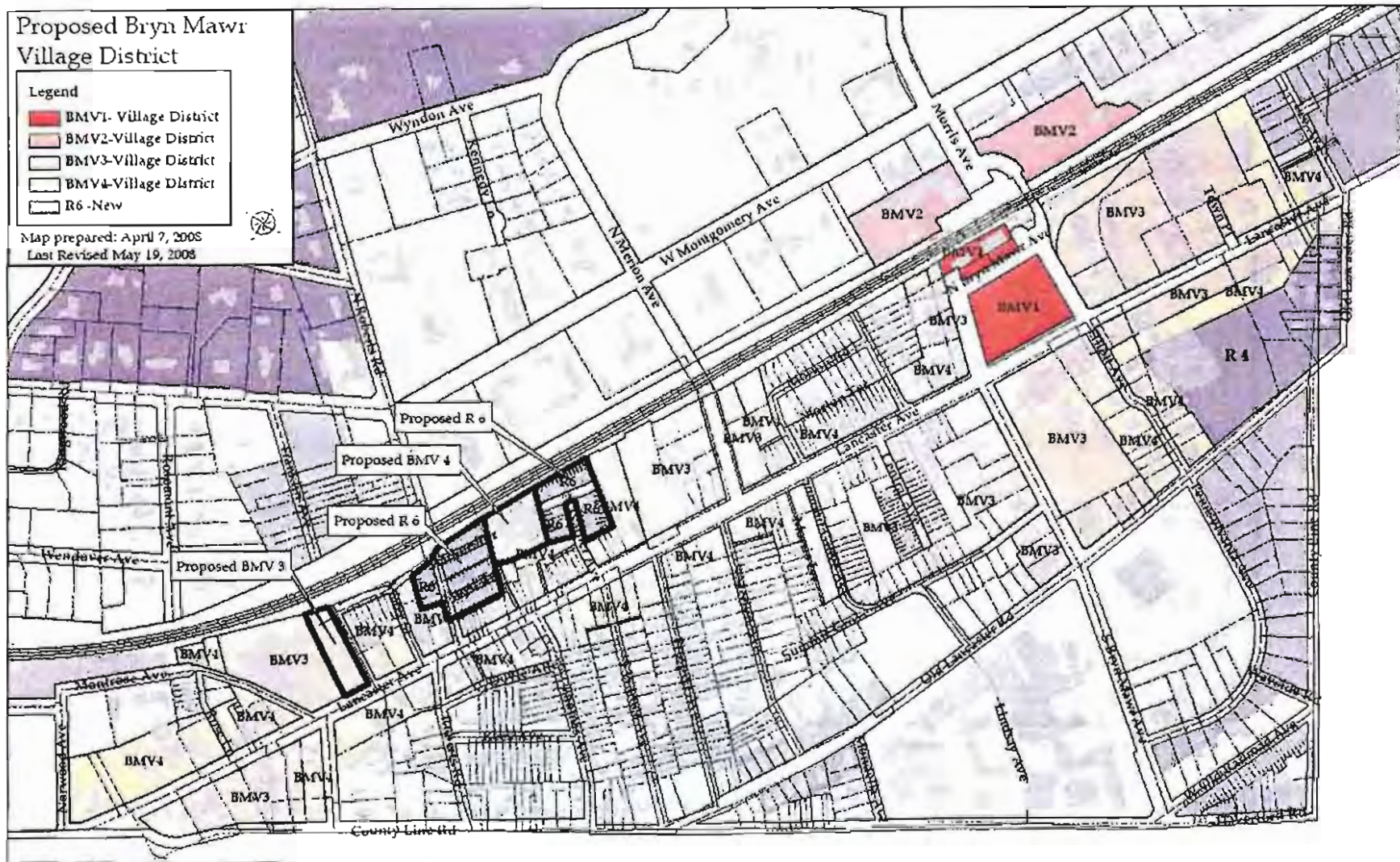
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Total 20 year total TRID revenue (all taxes)	\$	67,598,584
Total 20 year baseline (all taxes)	\$	25,030,714
20-yr net funds (all taxes)	\$	43,807,303
20-yr LMT & County Total @ 80%	\$	32,339,889
20-yr LMT & County baseline	\$	12,931,318
<b>20-yr LMT &amp; County net TRID funds</b>	<b>\$</b>	<b>20,114,152</b>
w/o BMH Parking Phase 1	\$	19,299,085
<b>20-yr Cost of delayed adoption/ 1</b>	<b>\$</b>	<b>815,067</b>

1/ Assumes Parking 1 not included in TRID increment; no interest calculation

- If TRID not in place by time BMH Parking Structure 1 put in service, estimated \$815,067 will be placed into baseline and not available specifically for TRID projects.
- Time lag between completion of BMH Parking Structure 1 and other projects may be >1 year. If TRID delayed, may want to wait 6 months – year before starting TRID
- Estimates based on delivery assumptions for various projects.

# Zoning – Proposed Bryn Mawr Village Zoning District



## Potential TRID Projects Order of Magnitude Estimates

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- SEPTA/Amtrak parking structure  
Design & Engineering: \$350,000  
Construction: \$8-10M
  
- Traffic improvements
  - Circulation, Morris Avenue Underpass & Tango intersection  
Design & Engineering: \$350,000  
Construction: \$1-2M
  - Bryn Mawr Avenue Intersection @ Ludington Library  
Design & Engineering: \$150,000  
Construction: \$750,000
  
- Streetscape improvements
  - Bryn Mawr/Lancaster Avenue - D&E: \$150,000/C: \$1.5-2.5M
  - Lot 7 Redevelopment – D&E: \$200,000/C: \$1-2M
  
- Central Avenue Area infrastructure redevelopment
  - Design & Engineering: \$300,000  
Construction: \$1.5-\$2.5M
  
- Reconfiguration of Community Center park and parking  
Design & Engineering: \$500,000  
Construction: \$2-2.5M

## Financials-Summary

<b>Current Assessed Values</b>	
Total TRID Area (including Planned Developments)	\$ 120,038,890
Total Preliminary TRID Area (excluding Parcels Planned for Developments)	\$ 102,047,000
Bryn Mawr Hospital Development Program Properties	\$ 7,941,545
Lot 7 (Exempt)	\$ -
Central Ave. Development Program Properties	\$ 8,843,002
Verizon Lot	\$ 1,207,343
<b>Current Total Assessed Value</b>	<b>\$ 17,991,890</b>
<b>Estimated Assessed Values After Improvements</b>	
Bryn Mawr Hospital Development Program Properties	\$ 54,666,225
Lot 7	\$ 21,228,949
Central Ave. Development Program Properties	\$ 38,865,110
Verizon Lot	\$ 1,730,340
<b>TOTAL Estimated assessed value after Improvement</b>	<b>\$ 116,490,624</b>

## TRID Process Steps

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- Township and Transit Agency agree to work cooperatively to create TRID
- Township and Transit Agency conduct community public meeting(s) on planning study
- Planning Study is revised and completed
- Township and Transit Agency accept Planning Study's findings and recommendations
- Township forms internal Management Entity to administer TRID implementation
- Township and Transit Agency coordinate with School District and County on Value Capture shares, schedule and TRID Financial Plan
- Township and Transit Agency hold public meeting on TRID Implementation Program improvements
- TRID Management Entity administers Value Capture revenues and expenditures in accordance with approved Implementation Program



## Implementation – Required Agreements

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- Township and Transit Agency **execute Agreement** on roles, responsibilities, financial commitments, management entity and defined improvements
- Township and Transit Agency Agreement with School District and County on Value Capture shares, schedule and TRID Financial Plan
- TRID Management Entity **executes Development Agreement** with successful Developer, including Public Sector Improvements and Private Sector Financial or Project Commitments
  - TRID Management Entity solicits **Developer** interest for Lot 7
  - Development proposal accepted by TRID Management Entity
  - Project construction and completion
- Amendments to Agreement or TRID Plan, as required

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, June 19, 2008, 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Charles Bloom  
Vincent DiCioccio  
Jerry Berenson  
Pat Wesley  
Hank Wilson

**Staff:**

Angela Murray  
Eric Persson  
Chas McGarvey

**Guests:**

Mac Nichols, Economic Research Advisors  
Rich Bickel, DVRPC  
Alex Long, SEPTA  
Ron Bednar, DCED  
Devon Cheshire, Trammel Crow

**Meeting Notes**

1. Report from the Chairman

Commissioner Zelov thanked everyone for coming to the meeting noting that it is the first meeting after the Board of Commissioners approved the Bryn Mawr Village Zoning Ordinances. He further thanked everyone for their hard work and support throughout the year long process of developing the zoning concepts and then working through the ordinance amendments.

Scott reported that the ribbon cutting for the Bryn Mawr horse that was relocated to the lobby of Bryn Mawr Hospital received coverage in the local paper. The ribbon cutting for the Warner Avenue playground improvements was also held recently and reported on in the local paper.

Scott announced that unlike last year when the committee needed to meet in July to work on zoning, there will not be meetings in July and August this year. The meetings will resume on September 18, 2008 at 5:00 PM.

## 2. Bryn Mawr Fire Company

Chas McGarvey, Lower Merion Township Fire Chief, reported on an emergency situation at the Bryn Mawr Fire House where water penetrated through the floor and rusted through the rebar. Emergency repairs are required and due to the weight of the equipment, the apparatus must be relocated while repairs are made. As this was an unanticipated repair, the Fire Department is moving some projects around to cover the costs.

Several locations have been considered for relocation purposes including Ashbridge Park and the Summit Grove area owned by Bryn Mawr Hospital. The Hospital has expressed their willingness to help with providing the location at Summit Grove that will also require the temporary removal of four parking meters by the Township. The fire equipment would exit out through Lot 10 and a tent and modular trailer will be located for staff and volunteer fire fighters to use. Chas has contacted the local utility companies to secure their assistance with the project.

Construction is expected to start on July 10<sup>th</sup> and continue for about eight to ten weeks. The project will include demolition of the existing conditions and repairs adding an epoxy floor where the apparatus will park. The source of water was identified as being the result of washing the trucks as well as leaks through the door during heavy rains resulting in erosion over the course of time. A question was raised as to what will happen to the siren since volume concerns have been expressed by residents and no decision has been reached.

A press release will be issued and Chas has offered to attend meetings of the civic and neighborhood associations to explain what will occur.

## 3. Bryn Mawr Village District Zoning Ordinance Update

Scott thanked everyone for their help with the rezoning process and announced the approval of the BMV by the Board of Commissioners the previous evening making note of the great effort put forward by the committee. Scott discussed the process noting that taking the time to do it right was important since there was not a development plan that was pushing the rezoning forward. Once the Ad Hoc Affordable Housing Committee completes its work and a Township-wide approach to zoning for Affordable Housing is agreed upon, this will have to be included in the BMV. The next goal for the committee is to discuss TRID and determine if and how it should move ahead.

Scott suggested that the members think about the traffic study and implementing the recommendations for improvements. TRID would be the most likely potential funding mechanism other than the Township Capital Improvement Program (CIP).

#### 4. Discussion of TRID planning analysis with Mac Nichols

Scott suggested that an information only presentation to the Board of Commissioners (BOC) be scheduled for September. Everyone on the committee worked together to bring zoning to fruition and Scott expressed hope that the same process be followed for TRID. Scott asked the members to consider what their interest is and what your future role would be in continuing with the committee. Scott asked that you contact him to discuss your interest prior to the September meeting.

Mac explained that there are some time pressures in determining how quickly the TRID could be adopted to take advantage of the tax assessment on the Bryn Mawr Hospital garage that is due to be completed in October or November. Since it is unlikely that TRID will be passed in time to include the garage, the value forecast will not include the garage. The next opportunity to begin to capture tax revenues would be once the proposed Bryn Mawr Hospital Medical Office Building (MOB) is completed. Devon Cheshire of Trammel Crow Company, the development managers for the hospital, expected to have the MOB ground breaking in the next couple of months with expected completion in late 2009.

Mac discussed the work he presented the previous month. In the interim, Mac spoke with Kathryn Madden & Lynn Hoffman from Sasaki Associates who will provide final draft language where needed. Now that zoning is passed and the new map and revised language is available, the value capture information can be finalized and the zoning ordinances will become appendices to the final document. Mac reviewed the power point and presented updated information. Lot 7 is quantified to reflect the program in the master plan, but with the new zoning. Bryn Mawr Hospital projects are projected to come on line based on their announced schedule.

The value capture analysis is based on assumptions and time estimates. When the funds become available are determined by when these improvements actually occur. The analysis sets 2014 as the most optimistic year for completion of known projects.

Mac explained how he conducted the analysis by reviewing all possible variables with Lower Merion Township, Lower Merion School District (LMSD) and Montgomery County participation and without LMSD. Using existing millage rates and assuming a 3% per year increase over a total 20 year period, at 100% participation, revenue generation for TRID would be \$67M starting from an existing baseline of \$25M. Alternatively, with the Township and Montgomery County participating at 80% each, over 20 year period, the TRID would produce \$32M starting at a baseline of \$12M for a total of \$20M funds available from TRID.

Since TRID will not be approved in time to realize revenues from the Bryn Mawr Hospital Garage, the loss in revenue is estimated at about \$815,000 over the 20-year term of the TRID. Typically, a structure becomes taxable from the point of receiving a Certificate of Occupancy (CO).

Using comparables from other parts of the Township, Mac used current assessed values and then projected forward for future improvements. If all projects envisioned were to be completed the tax base for the TRID area would increase from the existing \$17M to an estimated value of \$116M at 100% build-out. Thus, the Township would maximize the value of the land, but all within the adopted zoning.

Thus, net TRID funds would amount to \$19.2M over the proposed 20-year term with the Township and Montgomery County only contributing to the revenue. All projections change based on the tax year in which a new project comes on line. The second planned Hospital parking structure was estimated to come on line in 2012, but may not actually occur as scheduled. The estimated revenues change significantly depending on the projected build-out schedule and what actually occurs. For example, the projected date of 2014 could be aggressive for estimated completion of Lot 7 build-out.

Beginning with 2009, revenues expected for the first five years would be a little short of \$3M. Revenues are estimated to grow each year as new properties open and property values increase. There are various ways to secure the funds that include the Township issuing bonds or investing the cash. Such bonds are typically hard to underwrite due to the small amount of the issue.

Once the TRID Plan is completed, an agreement with SEPTA as well as one with Amtrak would be required setting forward uses for the revenue including public, traffic and transit related improvements. Once the TRID is approved by the State Department of Community and Economic Development (DCED), funding from various grant funds including PennDOT and the Transportation Improvement Plan (TIP), SEPTA capital budget and grant funding and other sources can be applied for to match TRID funds.

Several more steps would be necessary in completing the TRID package including finding areas of mutual benefit to both SEPTA and Amtrak such as improvements to the Morris Avenue bridge and underpass, high level platforms and ADA access, and other traffic and transit related improvements. The TRID Plan would include an agreement with SEPTA as well as the cooperation of Amtrak. The Township would recommend establishing a maintenance fund that would allow SEPTA to maintain the facilities after improvements were completed. It was noted that inner ring stations are growing in ridership, and as the high cost of gas increases, corresponding increases in rail use would be expected to continue.

As rail ridership increases, the demand for additional commuter parking spaces becomes more important both to SEPTA and for the redevelopment potential for Lot 7. Mac will ask Sasaki to re-calculate the number of spaces that can be expected per floor in a structured garage on the SEPTA commuter parking lot north of the tracks so that a more specific number of spaces can be understood. The rates for garage parking in SEPTA garages averages \$2-3 per day based on current rates in the new Norristown facility.

Scott suggested to the Committee that the consultants be prepared to present the TRID to the Board of Commissioners in September or October and if there is support, schedule a

formal presentation for a public hearing. The initial presentation should include the review of proposed possible projects for funding that would include discussion of replacement parking.

The remaining steps left in the process include executing agreements with SEPTA and Amtrak. Additional potential participants include Montgomery County, state of Pennsylvania, and the Lower Merion School District (LMSD). The form of the management entity would likely be internal to the Township to simplify operations and reduce any administrative costs. State participation would include priority funding within existing programs such as DCED and DCNR and other special designations including from PennDOT. While participation by the school district is not mandatory, the TRID legislation does require that they be consulted with.

Ron Bednar discussed the role of DCED and the state Community Action Team in dedicating funds to participate in high priority projects such as those proposed for Bryn Mawr. DCED grants could fund streetscape, infrastructure, etc., and provide an opportunity for consultation for participation in a redevelopment package. The Township is way ahead of most communities by having the zoning in place. Once the TRID plan is complete, and found to be acceptable to DCED, they would require that the Township “consult” with LMSD. This would involve making a formal presentation to LMSD for their participation.

The next steps are:

- Public and community meetings;
- Begin working on agreements with SEPTA and Amtrak;
- Finalize TRID planning study based on comment from the public;
- Agreement with DCED accepting the basics of the study outlining internal management, LMSD presentation, Montgomery County participation, value capture basis and percentages of participation.

The Township would officially transmit to DCED the TRID Plan and described boundary, Bryn Mawr Village zoning ordinance and map ordinance, Bryn Mawr Master Plan, a copy of the presentation to LMSD and a written request to DCED for formal designation. The Bryn Mawr Partnership is working on a BID plan for the business district.

Scott asked the Committee if they believe the Township should move forward with presenting the TRID plan to the BOC as well as the public and all agreed that there was no downside to proceeding. The next meeting of the Ad Hoc Bryn Mawr Committee to continue working on TRID will be on Thursday September 18<sup>th</sup>.

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Meeting Notes**

**Thursday, September 18, 2008, 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members in Attendance:**

Commissioner Scott Zelov, Chair  
Commissioner Maryam Phillips  
Susan Arizini  
Jerry Berenson  
Richard Bickel, Delaware Valley Regional Planning Commission  
Devon Cheshire, representing Bryn Mawr Hospital  
Vincent DiCioccio  
Barry Henry, Trammel Crow, representing Bryn Mawr Hospital  
Ken Sherman  
Mike Weilbacher  
Pat Wesley

**Staff in Attendance:**

Angela Murray

1. Report from the Chairman

Commissioner Zelov introduced new member Ken Sherman who represents the Bryn Mawr Business Association and is the owner of Sherman Shoes. Scott thanked the Committee again for their work noting that it was a huge step forward to pass the rezoning for the Bryn Mawr Village District. As owners become interested in making improvements to their properties, they will be able to take advantage of the new zoning changes. Once the Township Ad Hoc Affordable Housing Committee completes its analysis, affordable housing will be added to the Bryn Mawr Village Zoning ordinance.

The reconstruction of the “Five-Points” intersection at Bryn Mawr Avenue and County Line Road is continuing to move forward. Radnor Township is working to acquire necessary right-of-way (ROW) from local property owners. Once all ROW is acquired, the improvements should proceed.

The Township-wide tree inventory has been completed and will lead to tree planting along roadways. Scott asked the members to provide him with input on where trees should be planted. Plans already include placing some on Montgomery Avenue and

Bryn Mawr Avenue on the west side across from Ludington Library. The trees will be planted by the Township with funds received from the Montgomery County Open Space program. Susan Arizini suggested west of the Verizon lot including the area from the Fire House to Rosemont Plaza. Other suggestions include the corner near Hope's Cookies, the Wells Fargo Bank west bound past the church and near the CVS.

## 2. Update on Bryn Mawr Hospital Garage and MOB development

Devon Cheshire reported that the new hospital garage is near completion with site work and curbs being installed. The garage should be open in November and will be a great milestone for the hospital project. Although the garage will be completed and in operation, some site work could continue into January. Trammell Crow is preparing to secure permits from the Township to begin construction of the first Medical Office Building (MOB) and is expecting to have the groundbreaking for this project in the late fall. The surface lot planned for use for valet parking is in operation now. Because of ongoing construction activity, the excavated streets around the MOB site are torn up with temporary patching that will remain until the new building is finished. Although the MOB work will be disruptive to the street during construction, the area will be completely upgraded once completed.

Trammell Crow will be working on storm water facilities through the winter. They plan to install the fill basin on Pennsylvania Avenue in anticipation of the townhouse development beginning next year.

Devon announced that he has accepted a new position with a firm in Center City and will be leaving Trammell Crow. Devon introduced Barry Henry a Senior Development Manager who will be taking Devon's place in managing the development for Bryn Mawr Hospital. Any commitments made in the past by Trammell Crow staff will continue with Barry and communication will continue to be strong.

Vince DiCioccio reported on Bryn Mawr Partnership's efforts to form a BID for the Bryn Mawr Business District. At a recent Commissioner's meeting, there was a presentation by the Ardmore Initiative (AI) of their Business Improvement District (BID) renewal and budget efforts. AI requested a 10-year approval from the Township and annual funding to support increased budget requirements.

A sub-committee of the Bryn Mawr Partnership has been formed to meet with majority property owners on the proposed assessment based initiative. In addition, with the help of Eric Persson, Township Economic Development Specialist, the Bryn Mawr Partnership enlisted the services of the PA Downtown Center. The cost of their consulting services was shared 50/50 between the Township and the Partnership. Consultants from the PA Downtown Center made a presentation to the group that was well received by those in attendance. Vince reported that the group has gotten favorable feedback from Aqua America. The sub-committee will be meeting in October to strategize how best to continue enlisting the support of the large business groups and



companies. Once this phase is completed, the group will go back to the Partnership Steering Committee to meet with representatives from large owners. Thereafter, the consultants will help to write the BID plan.

The Bryn Mawr Business Association is also working on forming a 501(C) (3) non-profit and completing that process. However, the final BID plan must be completed for submittal to the IRS before the process can proceed. Once the BID plan is complete, the Partnership will make a public presentation to the Board of Commissioners to seek their support for the BID.

### 3. Transit Revitalization Investment District (TRID) Schedule and Future Process

Scott discussed the upcoming schedule and process for completing the TRID plan and value capture analysis. The Committee had agreed earlier in the year to pursue TRID given the priority for state grants that are available for TRID district improvements. Rich Bickel from DVRPC mentioned that Beaver County near Pittsburgh is close to completing their TRID plan. Bensalem Township has also begun to study creating a TRID District in Croyden. Rich noted that a meeting was planned for Tuesday September 23<sup>rd</sup> at DVRPC to share information amongst the TRID groups. Angela Murray will be presenting information on the Bryn Mawr TRID since the Bryn Mawr Value Capture analysis is the current model for TRID value capture in the region.

Rich also noted that SEPTA staff member Byron Comati has taken over the planning function for Dave Fogel. His major responsibility is to develop a strategic business plan. With seven TRID projects potentially proceeding through the planning process, and ultimately through the SEPTA system, the prospects for securing their cooperation are high with their new focus on system improvements and ridership growth. Rich explained that one of the difficulties with Amtrak is that policy direction comes from their headquarters in Washington, DC whereas SEPA can be easier to deal with since they are local and have more interest in providing support in the Delaware Valley region.

Scott suggested that the Township's Capital Improvement Program fits well with the TRID value capture as a potential funding source for infrastructure. Scott noted that the real estate revenues to the Township are down for 2008 and likely will be reduced in 2009. The CIP is being looked at more closely than in past years since the Township has always had a certain level of capital spending for pools, streets, bridges, etc. The operating budget is under pressure due to the reduced real estate transfer tax that is split between the Township and the Lower Merion School District. Since debt service is paid out of the operating budget, the CIP is being scrutinized closely.

Projects recommended in the Bryn Mawr Master Plan are in the CIP for future years. One example is the suggestion to relocate the Ludington Library parking lot to the area where the gazebo park is now and move the gazebo to a more prominent location in the park. Another Bryn Mawr CIP category is for traffic and parking improvements all of

which are on the list of projects that could be funded with TRID and recommended in our traffic study. Establishing the TRID and understanding the potential for the value capture will make it easier to prioritize the recommended improvements. Scott noted that the TRID plan and value capture need to be presented in some detail in the November time frame to the Board of Commissioners.

SEPTA and Amtrak discussions have been proceeding on the Ardmore Transit Center project and the contacts that have been made will be helpful for proceeding with projects in Bryn Mawr. This could include both the redevelopment of Lot 7 and the development of commuter parking facilities.

The Library Foundation has received plans and elevations for the expansion of Ludington Library. These are under review by the Library Board and are expected to be an improvement to the 1980's building with more stone and glass for the exterior. Ludington is slated to have the first improvements undertaken and will create a building that will have great presence on Lancaster Avenue.

#### 4. Lot 7 Redevelopment Process

Scott asked the Committee to think about how and when to move forward with redevelopment of Lot 7. We would want to designate funds for traffic improvements that could be provided by the TRID with matching funds from the PA DCED and PADOT. The TRID would require an agreement with SEPTA as well as input from Amtrak. However, the Township will have to work separately with Amtrak to deal with buying out the deed restriction or having their participation in the project.

The Township will have better understanding of what Amtrak is looking for in the way of a deal structure once the Ardmore project has been negotiated with them. Since replacement parking will be a major concern, the selected developer could build the garage for SEPTA at the same time as proceeding with Lot 7. Phasing and sequencing is the key now that the zoning is established to allow for development.

#### 5. Next Meeting

Jerry Berenson noted that Bryn Mawr College has plans for renovation to the existing gym with a 5,000 sf addition at the western end of campus. Fundraising is underway to undertake the project. October 4<sup>th</sup> is the date for the inauguration of the new president who has lots of energy and jumped right in to lead the school.

Bryn Mawr Hospital is proceeding to groundbreaking for the first Medical Office Building with a 14-month schedule for build out planned for completion in 2010. This is effectively the meaningful deadline for getting the TRID adopted by the Board of Commissioners and the state of Pennsylvania, and agreements in place with SEPTA and Amtrak.

Heidi Tirjan, the Township retail recruiter is making progress in her efforts to recruit potential retailers to Bryn Mawr. However, in general, it is very slow throughout the Township with attracting retailers who are fearful about expanding right now. Susan Arizini asked that Heidi let her know about possible retailers who are interested in Bryn Mawr to assist with recruitment. The Business Association can help with teaching owners about how to tell their customers where to park.

Vince made note that the Grossmans who own Baker Properties are primarily interested in attracting national retailers who are credit tenants rather than smaller entrepreneurial retailers. These companies typically go to Suburban Square and to King of Prussia for rental space. Baker Properties is trying to attract these retailers and Heidi has worked to interest them in independent retailers who have expressed interest in Bryn Mawr. The retail study does not support this level of use and is focused on the local chains and independent retailers.

The next meeting will include a presentation from Mac Nichols on the Bryn Mawr TRID and value capture analysis. The meeting will take place on Thursday, November 20th at 5:00 PM in the Caucus Room of the Township Administration Building.

**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, November 20, 2008, 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members in attendance:**

Commissioner Scott Zelov, Chair present  
Susan Arizini  
Jerry Berenson  
Vincent DiCioccio  
Ken Sherman  
Pat Wesley  
Hank Wilson

**Consultants:**

Mac Nichols, Economics Research Associates

**Staff:**

Angela Murray  
Bob Duncan

**Guests:**

Rich Bickel, AICP, Director of Planning, Delaware Valley Regional Planning Commission  
Byron Comati, Director of Strategic Planning & Analysis, SEPTA  
Alex Long, Senior Long Range Planner, SEPTA

**Meeting Notes**

1. Report from the Chairman

Commissioner Zelov welcomed the members and guests noting that the last meeting took place in September. Scott briefly explained the approval by the Board of Commissioners of placement of the plans on the Township Capital Improvement Program (CIP) for the expansion of the Ludington Library as well as improvements to the other Lower Merion Township libraries.

Scott asked if members thought that the location of a Farmers Market at the Ludington Library parking lot would be positively received by the community. The group "Farm to City" has submitted a request to establish a market in Bryn Mawr on Saturday mornings or Thursday afternoons for about a four-hour period. There are several "Farm to City"

markets set up in various locations in Philadelphia. Members responded that a better alternative would be for the market to be located on Lot 7 and held on Saturday. That location would be more visible to people driving by and if successful, would attract shoppers to the business district which would be welcome during this period. Alex Fleming noted that he shops at the farmers market that operates in Haverford and that traffic congestion is a problem in that location. Scott plans to discuss options with the Township Parking Services Director to discuss how the existing lots are used and to seek input on the best recommended location.

Hank suggested the area in front of the hospital would provide enough room for 8-10 vendors. However, Lot 7 would provide the most public visibility.

Scott announced that the Lower Merion School District is interested in locating a school bus parking lot on the Verizon lot. Bob Duncan has told LMSD that the use does not meet the BMV zoning code. Scott has spoken to each of the Township Commissioners and all agree that the use is inappropriate for that location. Scott is committed to making sure that this plan does not happen. However, until the LMSD withdraws their offer to Verizon, nothing will occur at the Verizon site.

A clarification to the definition of the term "Transit Facilities" in the Bryn Mawr Village Ordinance has been drafted and an amendment to the zoning code has been presented to the BOC. The amendment is on the agenda for the Board of Commissioners review on December 3<sup>rd</sup>. Two amendments to the BMV Ordinance were introduced to the Board. In addition to the definition change, the wall to window ratio for the Architectural Elements in the Development Design Standards will be considered. The existing requirement wherein every foot of wall should have a foot of window is too difficult for an existing building to renovate to this standard. This change creates a range of area rather than a specific standard and applies to the primary front façade above the ground level.

## 2. Update on Business Improvement District (BID) Planning

Vince DiCioccio reported that the BID Steering Committee met on November 10<sup>th</sup>. The group is creating a BID service document and once completed, the consultant group will complete the BID Plan. Meetings have been held with the major property owners and three of the four are supportive of the BID. The Steering Committee is interested in proposing to change existing parking meters to four hours from two and is also interested in buying out meters for holiday periods.

The local retailers are also supportive of converting the parking meter payment system to magnetic strip cards. The Township Parking Director, Tom Pintande is studying this possible change now. Scott requested that Tom include in his research how retailers could add time to shopper's individual meter cards to encourage shopping at their store.

Vince announced that the Bryn Mawr Streetscape Plan developed several years ago by Carter Van Dyke would become the official streetscape program to be used by the BID

for improvements. Scott requested that a copy of the plan be provided to Cliff Van Yahres to assist in determining street tree placement.

3. Presentation of the TRID Plan by Mac Nichols and discussion of future schedule and process

Mac presented a power point outline of the draft TRID plan that has been in development over the last two years. The information in the presentation will become a report supplemented with numerous appendices containing background work and other documents such as the TRID legislation. The plan will include all the elements required by the TRID legislation. For example, the rationale will be specific to Bryn Mawr rather than generic and the legislative steps will be reviewed.

There will be a section listing all the public meetings and committee meetings that have been held, an explanation of the process and a list of who has been present if possible. The report should demonstrate that the breadth of the community involvement has been broad. The role of the Ad Hoc Committee will also be explained.

The section on the TRID boundary will show the initial map and explain the process wherein it was reduced, changed and why. An example would be to explain why residential uses on the north side of the tracks were eliminated but rental properties that could ultimately be redeveloped based on new zoning were included on the south side. The section will include the specific legal description of the final boundary. The appendix will include the various memorandums that were developed to support the final boundary.

The context of buildings, relationship to colleges and the hospital, the importance of the pedestrian environment and how to improve traffic flow in the area will also be explained. Existing conditions, community facilities and how Bryn Mawr is a cohesive district and works together will be explained. The existing land uses as mapped out in the Master Plan and then the areas rezoned will be demonstrated and will show those that are publicly held and privately held.

A discussion of the rationale and need for rezoning and the rationale behind those changes will be included. This will be shown on a map with a GIS layer over the TRID layer illustrating the differences in zoning. Any revisions to zoning can be added to document after the amendments are passed.

Mac made note that the availability of the Verizon Lot for private sector redevelopment will be important in terms of the value capture analysis. If it were to continue to be underutilized and not redeveloped privately, it could impact the projected revenue from future real estate taxes.

A question was raised regarding the acceptance rather than adoption of the Bryn Mawr Master Plan by the Board of Commissioners. Scott indicated that the intent of the Board is to implement the plan, but certain aspects of the plan may not be completed based on

market conditions and other factors. The land uses proposed in the Master Plan and implemented in the BMV Zoning District are supportive of transit facilities and vice versa.

Market data and economic profiles are also included in the report and have been updated from the original work completed prior to the rezoning work. Mac noted that there has been more household formation in Lower Merion, but with no corresponding increase in population. This phenomenon has become the norm in recent years. A chart describing length of time for travel to work is included for the most recent year of 2007 showing the relationship of commuting patterns and ease of use of the lots.

A question was raised about how to secure information on where the commuters come from who park on Lot 7 and the SEPTA commuter lot. Bryon Comati, Director of Strategic Planning for SEPTA, believes the ridership shed for the Bryn Mawr Station could be somewhat broad given that it is a major station for express trains into Center City. Rich Bickel thought that DVRPC either has or could do such an analysis and will check to find out if there is recent data.

Other data in the report include tables that show primary market area and leasable area. The secondary market has a vacancy rate of 12% while the Bryn Mawr commercial area has a vacancy rate of 5%. Although there are a few vacancies in the retail district, Bryn Mawr is doing much better in the commercial office market than the larger secondary market area.

Mac noted that the residential comparables have been updated to include Cambridge Square in Ardmore and Merion Manor noting that there has not been much multi-family residential built in the Township over the last several years.

“Air rights” is a required element in the legislation for review although there is not much expected in this area and none are being considered for any of the projects in this study. Montgomery County is a 2A level county.

Traffic improvements proposed will be added to the report. TRID project prioritization as presented in the Master Plan will be refined and also become part of the TRID Plan. The TRID Plan becomes complete after public comments from the required public hearing are addressed and included in the report. Angela will complete a proposed project prioritization list and circulate among Committee members for input. This list will be the subject for the next Committee meeting.

A question was raised about the number of new spaces that are proposed for the TRID district and how the number of spaces required will be determined. Since a new structured parking garage is a huge capital investment on the part of SEPTA, the actual parking demand will have to be determined. If a garage is built, it should be appropriately sized, have an attractive exterior and serve the needs of the business community. The redevelopment of Lot 7 will govern the need for additional spaces for commuter, resident and short term parking uses.

4. Next Meeting

The December meeting is cancelled due to holiday commitments. The next meeting will take place on Thursday January 15, 2009 at 5:00 PM in the Caucus Room of the Township Administration Building.



**TOWNSHIP OF LOWER MERION**

**Ad Hoc Bryn Mawr Committee**

**Thursday, February 19, 2009, 5:00 – 6:30 PM**

**Township Administration Building  
Caucus Room**

**Members:**

Commissioner Scott Zelov, Chair - present  
Commissioner Maryam Phillips - absent  
Commissioner Lewis Gould - absent  
Commissioner Bruce Reed - absent  
Commissioner Philip Rosenzweig - absent  
Susan Arizini - absent  
Jerry Berenson - present  
Charles Bloom - absent  
Vincent DiCioccio - present  
Andrea Gilbert - present  
JoAnn Magnatta - absent  
Ken Sherman - present  
Mike Weilbacher - present  
Pat Wesley - present  
Hank Wilson – absent

**Guests:**

Rich Bickel

**Agenda**

1. Report from the Chairman

Commissioner Zelov reported that the design for the renovation and addition to the Ludington Library by Vitetta Architecture is moving forward and is consistent with BM Master Plan. The expansion of Ludington is part of a larger project to renovate all library facilities over the next several years. A significant private fundraising campaign is being conducted by the Library Foundation. The campaign is seeking both private and state funds with a goal of \$7M to supplement the \$24M task. A professional fund raising group was engaged to assist the Foundation with their efforts.

Construction of Ludington could get underway soon and has no specific deadline. This renovation is the biggest project since the addition to the Township building was undertaken several years ago. A recent meeting was held with Vitetta staff to received a more detailed understanding of costs and to create green building features. There are

building code issues that must be addressed in determining whether to keep the library open during the renovation. The Mother of Good Counsel School is vacant and might be considered for temporary use since the building has a big open library area within the facility.

## 2. Proposed Bryn Mawr Farmer's Market

Commissioner Zelov reported that the proposed Farmer's Market to be located on Municipal Lot 7 was approved by the Board of Commissioners at their meeting the previous evening. Copies of an article that appeared in the Philadelphia Inquirer and reported on by Bonnie Cook were distributed. Scott thanked Eric Persson for all of the leg work he had done working with Farm to City and that enabled the approval by the Township Board of Commissioners.

Jerry Berenson reported that there is interest among students and staff of Bryn Mawr College to bring the farmer's market to campus. The people interested in the farmers market found the Farm to City group after initially seeking Scott's assistance in finding an appropriate location in Bryn Mawr. Lot 7 became an obvious choice since it is visible and does not interfere with residential neighborhoods. Redevelopment of Lot 7 will not proceed for the next few years pending the development of the Ardmore Transit Center. The Ardmore Transit Center involves both railroads and as such will require more work to be advanced which will be of great benefit to Bryn Mawr as we proceed.

## 3. Update on Bryn Mawr Hospital Garage and Medical Office Building (MOB) Development

Hospital President Andi Gilbert reported that the new garage on the Founders site opened in January. The hospital is waiting for the crosswalk safety elements to be in place before shifting a large number of staff into new garage. Additional work is scheduled for Bryn Mawr Avenue that includes an island providing a pedestrian haven and a nicer look for the street.

The proposed MOB to be built across on Old Lancaster Road is still a very high priority for the hospital. Unfortunately, the Trammel Crow equity partner based in Michigan fell through in October placing the project on hold. Also, securing physicians commitments to leases in this environment has also raised concerns. The proposed Townhomes on Pennsylvania Avenue are still in the planning stage, but designs have not been presented to the Township. The timing for residential development may be a question for future discussion given the current economic environment. The hospital would not want to have townhomes built and remain unsold and uninhabited for an extended period.

An agreement regarding the historic Gerhard Building may be presented to a meeting of BOC soon. A unique arrangement outside of the Township's Historic structure classification system has been discussed that would preserve the building in a way that meets the hospital's needs.

Andi reported that although the Hospital is busy, they have experienced a reduction in elective surgery by patients. The hospital is preparing for downturn in this area with reductions in salary and other measures although their debt level is low. The hospital administration clearly expects to see more patients without insurance. The Bryn Mawr "Horse" is installed in the hospital lobby and looking well.

Main Line Suburban published an article on the status of the "Five-Points" intersection that straddles Lower Merion and Radnor Township. The news article indicates that Radnor Township has not yet been able to secure needed right-of-way (ROW) from Wawa. Since funds are available for the construction, efforts are underway to resolve the matter so work can get underway in the coming construction season.

Scott reported that the Verizon Lot will not be able to be used for school bus storage because it is not permitted by zoning. Currently, buses are parked in West Conshohocken and on Righters Ferry Road in Bala Cynwyd. Some number of buses will return to each high school once construction is completed.

Aqua America has parking challenges for their employees and Scott is working with them to resolve and assist in finding alternatives.

#### 4. Update on Business Improvement District (BID) Planning

Vince DiCioccio reported that the BID Steering Committee met to go over a list of potential services that can be performed by the BID with the help of the PA Downtown Center who helped to refine the list. Vince reported that preparation of the 501(C) (3) document is also underway. Future BID services could include some combination of business attraction and recruitment, image marketing, and other responsibilities similar to Ardmore Initiative. Holiday décor, festivals, gateway signs, banners, parking maps, restaurant package and other services may be managed by the BID. The next meeting is planned for March 18<sup>th</sup> at the Bryn Mawr Film Institute. The agenda includes reaching an agreement on the list of services that will be incorporated into the document to go to IRS for the 501(c) (3).

Vince reported that the Steering Committee has invited Carter Van Dyke to make a presentation at a future meeting to present the Bryn Mawr Streetscape plan that was completed by them in 1999. Bryn Mawr Beautiful provides clean-up and planting in Bryn Mawr. The Partnership Steering Committee is considering giving Bryn Mawr Beautiful funds to continue to do their annual work. The Steering Committee is working toward making a presentation to the BOC in the fall.

Ken Sherman asked to meet with Vince to avoid any overlap of functions between the BID and the Business Association. This situation exists in Ardmore where the roles of the business association and the BID are unclear. Ken reported that the web site for the business group has been built and there would be no reason to duplicate the effort.

## 5. Update on TRID Plan, Process and Schedule

Scott reported that significant work has been accomplished toward development of the Ardmore Transit Center in Ardmore. Thus far, \$22M of public funds has been raised to complete the project. Dranoff Properties was selected as developer for the project in March 2008 and scheduled projection for ground breaking in Ardmore is at least a year away.

The TRID Plan has been developed and efforts are underway to complete the process including updating and editing of the report document. Amtrak will need to be involved in Bryn Mawr as they are in Ardmore. What they expect in a real estate deal for Ardmore will be instructive. A Request for Proposals for Lot 7 in Bryn Mawr will be down the line after Ardmore gets further underway.

Rich Bickel provided an update on other TRID planning efforts. The TRID Planning Study for Croydon in Bucks County is currently on hold. The Paoli/Tredyffrin project has been held up by the Amtrak board for many months. Rich suggested that Steve Aishel would be a good person to talk to about issues with Amtrak.

Pat Wesley reported that the Bryn Mawr Film Institute (BMFI) had a large crowd for the Inauguration of President Obama. They plan to have a similar party for the Academy Awards. Voith McTavish Architects has received a Preservation Alliance Award for the historic design work on the BMFI. BMFI has over 6,000 members which is the largest membership of any independent film house in the country.

Ken Sherman discussed the conditions they have experienced with their Center City men's store location. Although there has been a downturn in general, Center City is doing better than the Rosemont store which is off 30%. Ken has talked to his colleagues among other independent stores about what has happened to retail throughout the United States. The general agreement is that people are not buying products.

Jerry Berenson reported the highest number of applications ever to Bryn Mawr College and with tuition going up 4% next year. Foreign applications have increased. The timing on building a new gym may be extended due to the fund raising atmosphere. The college may either scale back the project or place it on hold.

## 6. Next Meeting

The next meeting is scheduled for Thursday March 19, 2009 at 5:00 PM in the Caucus Room.

date 19 January 2007, Revised 31 January 2007

to Angela Murray, Mac Nichols

cc Susan Snyder, George Thomas, Janne Corneil, Lynn Hoffman, Roger Torino

from Kathryn Madden

project name Bryn Mawr TRID

project # 64581.00

subject Boundary Rationale

Establishing the boundary for a Transit Revitalization Investment District (TRID) is the first step in moving toward implementation of the Bryn Mawr Master Plan. In our work session on January 8, 2007, we delineated a preliminary boundary and identified several areas that needed further investigation. This memo outlines the criteria for determining the boundary and provides an analysis and recommendation for the areas in question.

The TRID boundary needs to be seen as a positive force that can benefit properties within, especially through the realization of improvements to the public realm and other amenities. In order to balance the incentive for redevelopment with the desire to encourage renovation and maintain the appropriate scale, the TRID should be considered as one tool that is used in conjunction with updated zoning and guidelines, investment tax credits, and a representative management entity such as a business improvement district.

#### **Preliminary Boundary and Rationale**

The preliminary boundary is shown on the attached map. The criteria for the boundary delineation are as follows:

1. **Distance:** Areas within one half mile of the Bryn Mawr station, in accordance with the TRID legislation
2. **Jurisdiction:** Areas within Montgomery County, which is the focus of this effort
3. **Development Potential:** Vacant land and underutilized land that has potential for future private redevelopment and significant tax value capture
4. **Renovation Potential:** Buildings that have significant renovation potential, which also provides tax value capture, including the shops along Lancaster Avenue and the residential apartments along Montgomery Avenue; stable residential areas that are in relatively good to excellent condition, especially when they have street frontage, are not included.
5. **Capital Improvement Need:** Areas that will benefit from improvements to the public realm that can be funded through the TRID mechanism. Improvements might include sidewalks, streets, parking, signage, and station facilities. Lancaster Avenue and Bryn Mawr Avenue are priority areas for improvements, along with other cross streets in the area, and possibly

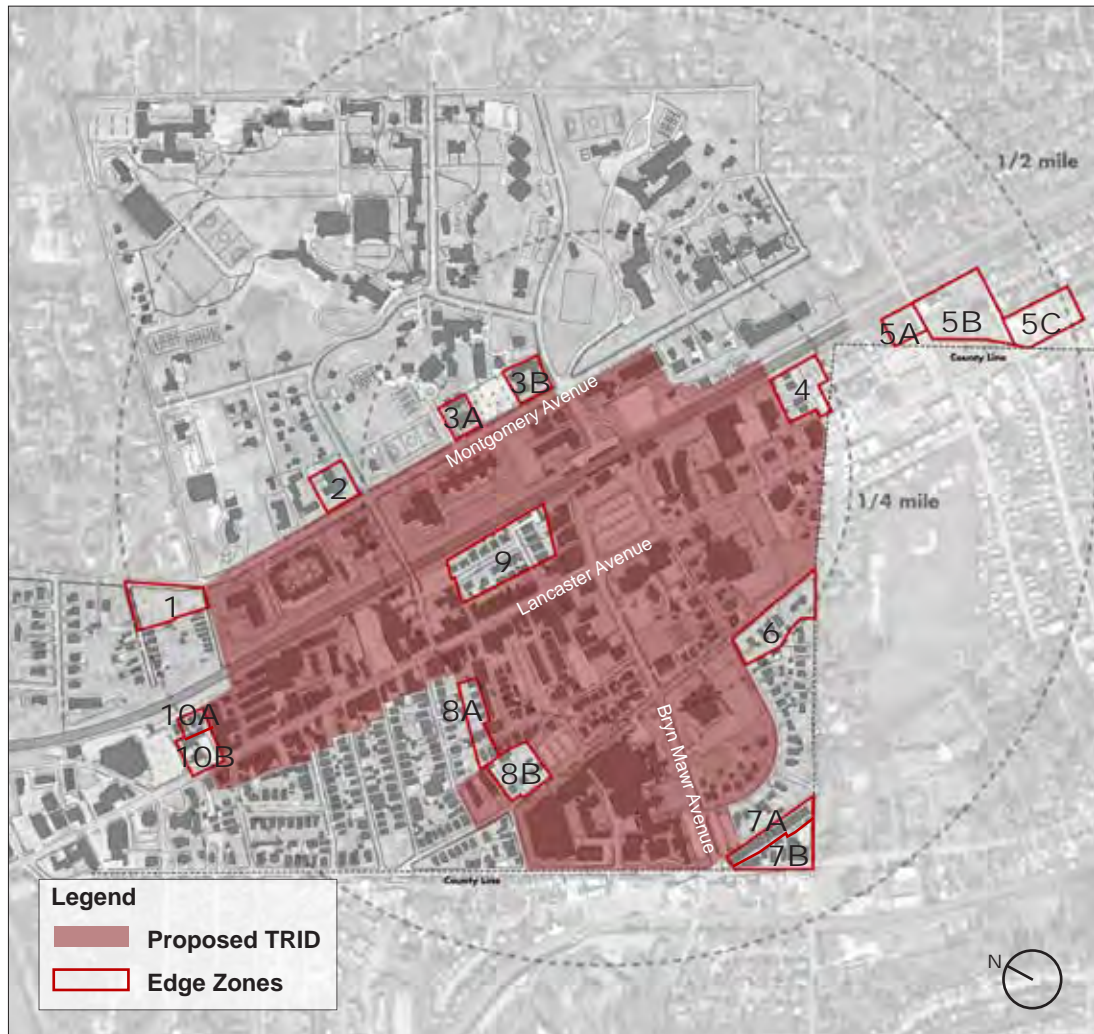
Montgomery Avenue. It may be useful to capture both sides of a road to be improved since properties on both sides will benefit.

6. **Continuity:** A district that is a complete and identifiable area, especially as it relates to capital improvements.
7. **Institutions:** Institutions that may redevelop all or part of their campuses for private development or spin-off economic development, such as Bryn Mawr Hospital, are included. Institutions that do not meet these criteria and thus do not contribute to the tax base and value capture are not included (Bryn Mawr College, Baldwin School, Shipley School, Harcum College, and church campuses).

**Analysis and Recommendations for Edge Zones**

All of the following edge areas are within the 1/2 mile radius or have parcels that touch this line. In addition, they are all within Montgomery County. The assessment of each edge area follows:

Proposed TRID and Edge Zones



**Zone 1**



Wooded, undeveloped lot

**Development potential:** If developed as firehouse, no tax revenue can be captured. If developed privately, then site holds potential for value capture.

**Recommendation:** Include in TRID

**Zone 2**



Multifamily housing (6 stories) in good condition

**Renovation potential:** Interior improvements may raise value and contribute to tax base.

**Recommendation:** Include in TRID

**Zones 3A and 3B**



3A  
Multifamily housing (3 stories) in good condition

**Renovation Potential:** Interior improvements may raise value and contribute to tax base.

**Recommendation:** Include in TRID



3B  
Multifamily housing (3 stories) in good condition

**Renovation Potential:** Interior improvements may raise value and contribute to tax base.

**Recommendation:** Include in TRID

**Zone 4**



Single family homes (2 stories) in good condition

**Renovation Potential:** Renovations would not have significant impact on tax base.

**Recommendation:** Do Not Include in TRID



**Zones 5A, 5B, and 5C**



5A  
Single family homes (2 stories) in good condition

**Renovation Potential:** Renovations would not have significant impact on tax base

**Recommendation: Do Not Include in TRID**

5B  
Church Compound (1-3 stories)

**Redevelopment/Renovation Potential:** Due to status as non-profit entity, does not generate tax revenue

**Recommendation: Do Not Include in TRID**

5C  
Strip retail development (1 story) in average condition

Not contiguous with TRID but has frontage on Lancaster Avenue

**Redevelopment/Renovation Potential:** May improve tax base

**Recommendation: Do Not Include in TRID**

**Zone 6**



Single family homes (2-3 stories) in excellent condition

**Renovation Potential:** Renovations would not have significant impact on tax base

**Recommendation: Do Not Include in TRID**

**Zone 7**



7A  
Single family homes (2 stories) in average condition  
Adjacent to Five Corners strip commercial and parking  
**Redevelopment/Renovation Potential:** May improve tax base  
**Recommendation:** Include in TRID

7B  
Strip retail and auto-related development (1-2 stories) in average condition  
**Redevelopment/Renovation Potential:** May improve tax base  
**Recommendation:** Include in TRID

**Zones 8A and 8B**



8A  
Single family homes (2 stories) in average condition  
Structures lack street frontage, lie adjacent to redevelopment/renovation site, and are contiguous with the adjacent neighborhood  
**Redevelopment/Renovation Potential:** May improve tax base  
**Recommendation:** Do Not Include in TRID

8B  
Single family homes (2 stories) in good condition  
Zone surrounded by proposed TRID on all sides  
**Renovation Potential:** Renovations would not have significant impact on tax base  
**Recommendation:** Include in TRID

**Zone 9**



Multifamily housing (2 stories) in good condition but surrounded entirely by proposed TRID

**Renovation Potential:** Renovations would not have significant impact on tax base

**Recommendation:** Include in TRID

**Zones 10A and 10B**



10A  
Multifamily housing (2 stories) in good condition

**Renovation Potential:** Renovations would not have significant impact on tax base

**Recommendation:** Do Not Include in TRID

10B  
Strip retail (1 story) in average condition

**Redevelopment/Renovation Potential:** May improve tax base

**Recommendation:** Include in TRID

## **XVII. Appendix D- Bryn Mawr Village Zoning District**

**An Ordinance**

**No. 3870**

**AN ORDINANCE, Amending The Code Of The Township Of Lower Merion, Chapter 155, Zoning, To Revise The Definition Of “Transit Facilities”, To Provide That Rail Transit Facilities Are A Permitted Use In The BMV1, BMV3 And BMV4 Village Districts.**

The Board of Commissioners of the Township of Lower Merion hereby ordains:

**Section 1.** The Code of the Township of Lower Merion, Chapter 155, entitled Zoning, Article II, Definitions, 155-4, Terms defined, subsection B, the definition of Transit Facilities, shall be amended to provide as follows:

§ 155-4. Words and terms defined. Unless otherwise expressly stated, the following words and phrases shall be construed throughout this chapter to have the meanings indicated in this article:

\* \* \* \* \*

TRANSIT FACILITIES – The property, equipment, and improvements of whatever nature, owned, used, constructed, maintained, controlled, or operated to provide mass transportation for passengers or to provide for the movement of people. Rail Transit Facilities include rail lines, platforms, passenger waiting areas, passenger parking lots, and passenger Parking Structures, passenger pick-up and drop-off areas, tracks, bridges, tunnels and accessory retail including areas for sales of fares.. Bus Transit Facilities include bus stops bus terminals, passenger waiting areas, passenger parking lots, passenger Parking Structures, passenger pick-up and drop-off areas and retail including areas for sales of fares.

\* \* \* \* \*

**Section 2.** The Code of the Township of Lower Merion, Chapter 155, entitled Zoning, Article XXXIV, Bryn Mawr Village District, section 155-212, subsection (A), paragraph (7), shall be amended as follows:

§ 155-212 Use regulations for BMV1, BMV3 and BMV4 Village Districts.

In the BMV1, BMV3 and BMV4 Village Districts, the following regulations shall apply.

A. The following uses are permitted on grade level and upper level floors:

\* \* \* \* \*

(7) Rail Transit Facilities.

**Section 3.** Nothing in this Ordinance or in Chapter 155 of the Code of the Township of Lower Merion, as hereby amended, shall be construed to affect any suit or proceedings in any Court, any rights acquired or liability incurred, any permit issued, or any cause or causes of action existing under the said Chapter prior to the adoption of this amendment.

**Section 4.** The provisions of this Ordinance are severable, and if any section, sentence, clause, part, or provision thereof shall be held illegal, invalid, or unconstitutional by any Court of competent jurisdiction, such decision of this court shall not affect or impair the remaining sections, sentences, clauses, parts or provisions of this ordinance. It is hereby declared to be the intent of the Board that this ordinance would have been adopted if such illegal, invalid, or unconstitutional section, sentence, clause, part, or provision had not been included herein.

**Section 5.** This Ordinance shall take affect and be in force from and after its approval as required by law.

Approved by the Board this 3rd day of December, 2008.

BOARD OF COMMISSIONERS OF THE  
TOWNSHIP OF LOWER MERION

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Bruce D. Reed, President

ATTEST:

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Eileen R. Trainer, Secretary

## **XVIII. Appendix E- Draft TRID Agreement**

## **Transit Revitalization Investment District Agreement Bryn Mawr TRID**

The attached is a draft of an agreement that would be executed among the potential parties to the Bryn Mawr TRID Plan should the Township choose to proceed with creating the Bryn Mawr TRID District. The draft includes annotated comments to clarify certain assumptions made throughout the document.

The draft agreement is broadly written to include all potential parties that may possibly participate in the TRID program. The agreement is inclusive of all taxing bodies anticipated including Lower Merion Township (“Township”), Montgomery County (“County”) and the Lower Merion School District (“School District”). Should a pending amendment to the TRID legislation allow for other tax sources to be available for capture within the TRID district, the agreement could be redrafted to include such sources.

In addition, the draft includes utilizing the Redevelopment Authority of Montgomery County (“RAMC”) as the conduit for issuing and managing bond indebtedness. The use of a redevelopment authority is a typical option for many cities and municipalities. However, the Township may choose to be the bond issuer and debt manager on behalf of the Bryn Mawr TRID Authority rather than utilizing the RAMC for this purpose.

The agreement includes SEPTA, but not Amtrak. However, Amtrak owns the Harrisburg R5 line and leases facilities along this 47-station rail corridor to SEPTA. These facilities are inclusive of the Bryn Mawr Station, parking and access areas. SEPTA has participated in the TRID Planning efforts and it is expected that they will be willing to enter into an agreement for the TRID Plan. Because of the ownership and lease structure associated with the Bryn Mawr Station, the Township anticipates seeking approvals as well as participation from Amtrak in the future.

This document was developed originally by Econsult Corporation for a potential TRID to be developed in the city of Philadelphia. The Township appreciates the willingness of Econsult and their clients to share this information and allow it to be revised and redrafted.



## ANNOTATED DRAFT

### Transit Revitalization Investment District Agreement Bryn Mawr TRID

THIS AGREEMENT ("**Agreement**") is made as of this \_\_\_\_\_ day of \_\_\_\_\_, 2009 by and among **THE TOWNSHIP OF LOWER MERION, PENNSYLVANIA**, an incorporated municipality of the Commonwealth of Pennsylvania ("**Township**"), the **COUNTY OF MONTGOMERY**, an incorporated municipality of the Commonwealth of Pennsylvania ("**County**"), and **THE SCHOOL DISTRICT OF LOWER MERION**, a political subdivision of the Commonwealth of Pennsylvania (the "**School District**") (the Township, County and the School District being sometimes collectively referred to as the "**Taxing Bodies**"), **SOUTHEASTERN PENNSYLVANIA TRANSPORTATION AUTHORITY**, a body corporate and politic existing under the laws of the Commonwealth of Pennsylvania ("**SEPTA**"), **THE REDEVELOPMENT AUTHORITY OF MONTGOMERY COUNTY**, a body corporate and politic existing under the laws of the Commonwealth of Pennsylvania ("**RAMC**")<sup>1</sup>, <<insert lender name>> ("**Lender**"), **BRYN MAWR TRID AUTHORITY**<sup>2</sup>, a municipal authority under Pennsylvania law 53 Pa. C.S. Ch 56 ("**Management Entity.**")<sup>3</sup>.

#### BACKGROUND:

WHEREAS, the Transit Revitalization Investment District Act, Act of December 8, 2004, P.L. 1801, No. 238 (collectively, the "**Act**")<sup>4</sup> empowers municipalities, counties, and public transportation agencies to work cooperatively to establish Transit Revitalization Investment Districts ("**TRID**") and the appropriate mechanisms to capture the real estate taxation and other values added by development activities for reinvestment in the transit system and local communities

WHEREAS, **the Management Entity** shall prepare a detailed project plan (the "**Project Plan**") which will be based on and informed by the findings of the TRID Planning Study; attached hereto as **Exhibit A**, for the redevelopment of the area around the Bryn Mawr Station on SEPTA's R5 Regional Rail Line (the "**Station**"), and the TRID Planning Study was formally presented to the Township for its review and approval in accordance with the Act;

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<sup>1</sup> The use of RAMC as the financing mechanism is consistent with Section 303 of the TRID Act. RAMC was inserted in the draft agreement because they could handle the logistics of issuing the bonds if needed.

<sup>2</sup> This Management Entity may be an authority of the Township appointed by the Board of Commissioners and managed by the Township or a non-profit incorporated body.

<sup>3</sup> The TRID board is required by the TRID Act and will act as the management entity of the project. The lender's name will be filled in once known.

<sup>4</sup> Establishing the statutory authority for this agreement.

WHEREAS, the Township believes that it is necessary to establish the TRID according to accepted transit oriented development principles, and to promote transit oriented development in the Bryn Mawr Village;

WHEREAS, the TRID Act provides the Township, County, School District and SEPTA the means to work collaboratively towards specific development projects that adhere to those principles<sup>5</sup>;

WHEREAS, to support the TRID, the Township, the County, the School District, and SEPTA, are willing to provide the Management Entity with the resources set forth in this agreement;

WHEREAS, without the assistance of the parties as set forth in this agreement, the Management Entity would not be able to undertake this TRID;

WHEREAS, after the public hearing held on <<insert date>>, as required by the Act, the Township approved Ordinance No. <<insert number>> signed by the President of the Township Board of Commissioners on <<insert date>> (the "**Ordinance**") attached hereto as **Exhibit B**<sup>6</sup>, authorizing the creation of the TRID and Management Entity in accordance with the Act, adopting the TRID Planning Study as required by the Act;

WHEREAS, Lender desires to lend to RAMC and RAMC desires to borrow from Lender the sum of <<insert amount>>-pursuant to that certain Note from RAMC to the order of Lender of even date herewith (the "**TRID Note**")<sup>7</sup>, which shall be secured by the pledge of the TRID Fund (as defined below) pursuant to a pledge agreement as the same may be modified and amended from time to time (the "**Pledge Agreement**") as set forth herein as **Exhibit C**, attached hereto;

WHEREAS, RAMC intends to lend the proceeds of the TRID Note to the Management Entity to be used for projects in the TRID pursuant to the Project Plan.

WHEREAS, the Taxing Bodies, Management Entity, RAMC and Lender desire to set forth the terms by which the TRID Note will be issued and repaid, and other mutually acceptable terms and conditions with respect to such matters, all in accordance with the Act.

NOW, THEREFORE, for and in consideration of the foregoing and the respective rights and obligations of the parties herein set forth and incorporating the Background set forth above, the parties hereto, intending to be legally bound, hereby covenant and agree as follows:

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<sup>5</sup> This embeds into the agreement the spirit of collaboration among the Township, the County, School District and SEPTA.

<sup>6</sup> This information and the ordinance itself can be inserted once known.

<sup>7</sup> All relevant amounts and the note itself can be inserted once known.

1). **TRID.**

**1.1** The **TRID** shall mean the land and improvements located within approximately a half-mile radius of the “**Station**”, as more particularly described in **Exhibit D**, attached hereto, which contains said properties (as hereinafter defined) and nothing else.<sup>8</sup>

**1.2** The TRID shall exist for a term of twenty years (the “**Term**”) commencing <<insert date>>, (the “**TRID Effective Date**”) and terminating <<insert date>> (the “**Termination Date**”).

**1.3 TRID Management Entity.** The Management Entity responsible for implementing the Project Plan within the TRID will be established as a municipal authority of the Township in accordance with Pennsylvania law 53 Pa. C.S. Ch. 56 and shall be known as the **BRYN MAWR TRID AUTHORITY**.

**1.3.1 TRID Management Entity Composition.** Management Entity responsible for implementing the TRID Plan shall be comprised of at least one member from or appointed by the following:

- Township of Lower Merion
- Montgomery County
- School District of Lower Merion
- SEPTA

2). **Activities and Commitments of Each Party**<sup>9</sup>

**2.1 The Township.** In addition to the requirements explicitly enumerated in this agreement, the Township also agrees to maintain within the TRID the same level of municipal programs and services that were provided within the TRID before its establishment.<sup>10</sup> The Township will not use TRID funds to substitute for municipal spending on capital improvements or ongoing maintenance.

**2.2 The School District.** In addition to the requirements explicitly enumerated in the agreement, the School District also agrees to work with the TRID Management Entity to encourage transit and related infrastructure investments that are consistent with its own capital and programmatic goals.

**2.3 SEPTA.** In addition to the requirements explicitly enumerated herein, SEPTA agrees to maintain within the TRID the same level of transit programs and services that were provided within the TRID before its establishment. Also, SEPTA

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<sup>8</sup> TRID districts require a description of its boundaries.

<sup>9</sup> This section is required as per Section 301(b) of the TRID Act.

<sup>10</sup> This language is similar to those used in a BID ordinance.

agrees to maintain all improvements made to any SEPTA transit stop using TRID Funds. SEPTA also will not use TRID funds to substitute for spending from their capital budget that was included in the SEPTA long-range capital budget before the establishment of the TRID.

**2.4 RAMC.** RAMC shall execute and deliver to Lender the TRID Note in the original principal amount of <<insert amount>>. The TRID Note shall be substantially in the form attached hereto as **Exhibit E** and secured by the Pledge Agreement. RAMC shall lend the proceeds of the TRID Note (the "**Project Loan**") to the Management Entity to be used solely in payment of Project Costs (as defined in the Project Plan), which Project Loan shall be evidenced by Management Entity's Note to RAMC substantially in the form of **Exhibit E** (the "**Project Note**").

**2.5 TRID Management Entity.** In addition to the requirements explicitly enumerated herein this agreement, as well as the requirements of the TRID Act and the Ordinance establishing the TRID Management Entity, the Township agrees to complete the necessary legal documents to form the Management Entity as a municipal authority and adopt the necessary by-laws.

**2.5.1** Management Entity shall construct and, at all times, maintain and operate the Project as contemplated by the Project Plan and the Ordinance. The TRID Management Entity shall also be responsible for deciding which aspects of the project plan are implemented and when.<sup>11</sup>

**2.5.2** Management Entity shall apply funds received in connection with the Project solely in partial payment of Initial Project Costs (as defined in the Project Plan) associated with the Project.

**2.5.3** Management Entity shall serve as a conduit through which the Township and SEPTA can enter into joint development agreements with private developers to facilitate large-scale projects and other actions that expedite the development process and ensure greater coordination between land use and transportation planning.

**2.5.4 Progress Reports.** Management Entity shall report to the Taxing Bodies and SEPTA on the progress of its implementation of the TRID Planning Study at the first-regularly scheduled meeting of the taxing-bodies following the first anniversary of the execution of this Agreement and each anniversary of said execution thereafter until the termination date. Such report shall include at least the following information and may contain other such information with regard to the plan as the management entity wishes to present to the Taxing Bodies and as SEPTA may reasonably require:

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<sup>11</sup> Since funds are generated on a district wide basis there needs to be some decision-making body that recommends to the Township projects to be undertaken. It is the Management Entity that enables cooperation between the Township and SEPTA. It also ensures the mutual accountability of the Township and SEPTA to the general public, neighborhood groups, and other stakeholders.

- 1). Status of construction of the Project Improvements;
- 2). Actual Project Improvement costs compared to Plan estimates;
- 3). Actual start and completion dates of Project Improvements in the TRID District compared to Plan estimates; and
- 4). Estimated start date of Project Improvements not yet commenced at the date of report.

The Management Entity shall from time to time furnish such other reports on specific matters not addressed by the foregoing as the Taxing Bodies and SEPTA may reasonably require.

Upon completion of the Project Plan, the Management Entity shall submit a report certifying that the Project Improvements have been completed in accordance with the Plan and that it is in compliance with all other provisions of this agreement to the Taxing Bodies and SEPTA.

**2.5.5** The Management Entity shall provide RAMC and Lender with reasonable access to the TRID and TRID-related records upon reasonable notice for purposes of verifying compliance with the Project Plan and this Agreement.

**2.5.6** The Management Entity shall continue to meet with civic associations, business associations, community/neighborhood groups, and in other public forums to receive input from the public and to provide the public with information about the progress of the project.

**3). Project.** The Management Entity shall undertake such projects as included in the Project Plan and as inferred by the TRID Planning Study, and that conforms to the transit oriented development principles laid out in the Bryn Mawr Village District Zoning Ordinance.<sup>12</sup>

**4). The Loan.**

**4.1** RAMC shall execute and deliver to Lender the TRID Note in the original principal amount of <<insert amount>>. The TRID Note shall be substantially in the form attached hereto as **Exhibit C** and secured by the Pledge Agreement.

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<sup>12</sup> The Township and SEPTA would agree, with the participation of other members of the Management Entity to a preliminary list of prioritized infrastructure improvements.

**4.2** RAMC shall lend the proceeds of the TRID Note (the "**Project Loan**") to the Management Entity to be used solely in payment of Project Costs (as defined in the Project Plan), which Project Loan shall be evidenced by Management Entity's Note to RAMC substantially in the form of **Exhibit E** (the "**Project Note**").

**4.3** Management Entity may arrange for refunding of the Project Loan, up to the outstanding principal balance of the Project Loan at the time of such refunding, from time-to time ("**Substitute Loan**"), in which case the Substitute Loan maybe secured by the pledge of TRID Revenues so long as the terms of the Substitute Loan do not require payments by RAMC in excess of the debt service paid by Real Estate Tax Increments<sup>13</sup> for the initial TRID Note and so long as the term of the Loan does not extend beyond the Termination Date. The Substitute Loan shall be evidenced by a substitute TRID Note and such other documentation as is reasonably satisfactory to the parties hereto. The lender under the Substitute Loan shall be deemed to be the Lender for all purposes of this Agreement. Whenever herein there is a reference to the TRID Note, any Substitute TRID Note shall be included therein.

**4.4** Payments on the TRID Note shall be made from amounts in the TRID Fund. "**TRID Fund**" shall mean the sum of the Real Estate Property Tax Increment (as hereinafter defined) as have accumulated as a result of the payment of TRID Revenues (as hereinafter defined) by the Taxing Bodies to RAMC. To the extent that, after payment of scheduled principal and interest (including any financing fees or penalties) on the TRID Note, there remain monies in the TRID Fund, such monies shall be paid and applied as set forth in Section 6.

**4.5** RAMC shall assign the Project Note to Lender and deliver the Pledge Agreement to Lender.

**4.6** To the extent that at any time there is a deficiency in the TRID Fund necessary to pay the TRID Note, Lender shall utilize payments due under the Project Note (to the extent available under the terms of the Project Note) in satisfaction of the TRID Note.

**5).** **TRID Revenues.** "**TRID Revenues**" shall mean the sum of the Real Estate Property Tax Increment (as defined below) which are collected by the Taxing Bodies from the Project during the term of the TRID District.

### **5.1** **Definitions.**

**5.1.1** For purposes of this Agreement, references to "**tax revenue**" or "**tax revenues**" shall not include penalties and interest collected by the Township as a result of any late payments thereof.

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<sup>13</sup> The TRID Value Capture conservatively assumes that only the Property Tax Increment will be used to fund the TRID. Please note that the TRID legislation allows other taxes beside property taxes to be captured.

**5.2 Real Estate Taxes.**

**5.2.1** The "**Real Estate Tax Base**" shall mean an amount on account of real estate taxes determined by the Montgomery County Board of Assessment based on the assessed value of all land and improvements in the TRID as of the TRID Effective Date. Real Estate Tax Revenues collected each year for the appropriate tax year during the Term of the TRID up to the Real Estate Tax Base shall inure to the benefit of the Township, County and School District in accordance with the Act.

**5.2.2** The "**Real Estate Tax Increment**" shall mean all incremental amounts in real estate tax revenue over the Real Estate Tax Base collected each year until termination of the TRID. The Real Estate Tax Increment each year shall be eligible under the Act and is hereby authorized to fund Eligible Project Costs in accordance with the Act. Such Real Estate Tax Increment may result either from an increased assessment of the Project or increased millage rate.

**5.4 Payment in Lieu of Taxes**

The Management Entity shall allow for and encourage tax-exempt property owners located within the District to provide in-kind services or a financial contribution to the TRID Fund, if not assessed, in lieu of a property tax increment.

**6). Collection of TRID Revenues.**

**6.1** The Taxing Bodies hereby agree that all TRID Revenues received by the Taxing Bodies shall be paid over to RAMC for deposit into the TRID Fund in accordance with the Act and in accordance with the time-frames described below. The School District hereby irrevocably authorizes and appoints the County as its agent to pay over to RAMC in accordance with this Agreement any and all TRID Revenues which are received by the County and derived from tax revenues payable to the School District, and the County hereby accepts the appointment and agrees to pay over such TRID Revenues in accordance with this Agreement.

**6.1.1** The Taxing Bodies shall pay the Real Estate Property Tax Increment to RAMC within forty-five (45) days after receipt thereof by the Taxing-Bodies (except as to the first installment payment pursuant to this Agreement which shall be paid to RAMC within ninety (90) days after receipt thereof). Within thirty (30) days of RAMC's receipt of the Real Estate Property Tax Increment from the Taxing Bodies, RAMC shall transfer all such sums to Lender.

**6.2** The Real Estate Property Tax Base shall inure each year to the benefit of the Township, County and School District in accordance with their current respective millage rates and governing law.





**7.2.2** Any balance remaining in the TRID Fund after disbursements as set forth above shall be paid to Lender on account of the Project Note and applied to the prepayment of principal of the TRID Note.

**7.3** On the Termination Date, after payment of principal and accrued and unpaid interest (including financing fees and penalties) on the TRID Note, RAMC shall pay all amounts remaining in the TRID Fund which are not required for payment under Paragraphs 7.2.1 or 7.2.2 to the Management Entity to be used to fund maintenance and upkeep of the improvements made.<sup>14</sup>

**8). Private Sector Development Agreements.** In furtherance of this agreement the Management Entity can enter into development agreements with pertinent private sector develop organization or organizations to implement the proposed TRID. The development agreement shall stipulate the final project scope as well as the partners' roles, responsibilities, financing arrangements, schedule of improvements and exactions or contributions to the project.<sup>15</sup>

**9). Limitation of Liability.** Notwithstanding anything to the contrary contained in the TRID Note or this Agreement, neither the Taxing Bodies nor RAMC shall have any liability hereunder or under the TRID Note or otherwise in connection with the transactions contemplated by the TRID Note or this Agreement, except to the extent TRID Revenues are actually received by the Taxing Bodies or RAMC. Under no circumstances shall the TRID Note or the covenants hereunder constitute a general obligation of the Taxing Bodies or RAMC. Neither the officials of the Taxing Bodies nor the members of RAMC, nor any person executing the TRID Note shall be liable personally on any such notes by reason of the issuance thereof. The TRID Note, and any replacement notes or bonds, shall expressly state, and the parties hereby acknowledge, that such notes or bonds have been issued to accomplish the public purposes of the Act and shall be conclusively deemed, to the fullest extent permitted by the Act (including without limitation Section 9(f) thereof), in any suit, action or proceeding involving the validity or enforceability of such note, bond or security therefore, to have been issued for such purpose. The Taxing Bodies shall have no obligations in connection with the transactions contemplated by this Agreement except for those expressly stated herein and in the Act.

**10). Defaults.** The occurrence of any of the following events or conditions shall constitute an "Event of Default" hereunder:

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<sup>14</sup> Bondable amounts generated by value capture have been conservatively estimated. The intent of value capture is to have dollars captured locally spent locally. Thus, excess funds are made available to the Management Entity. Note that the TRID Act sets a limit on the amount of time the tax increment can be captured. It does not require that all of the money be spent during that 20 year period. Expenditures can continue beyond the 20 year value capture time period.

<sup>15</sup> As per the TRID Act Section 504.



modify any clauses or provisions of the within Agreement to further the purposes of the Project Plan or any amendments thereto.

**12.5 Severability.** In the event any provision, section, sentence, clause or part of this Agreement is determined by a court of competent jurisdiction to be invalid and unenforceable, such determination shall not affect the validity or effect of the remaining provisions which shall remain in full force and effect and shall be liberally construed in favor of Lender in order to effectuate the provisions of this Agreement. In addition, in no event shall the rate of interest on the TRID Note exceed the maximum rate of interest permitted to be charged by applicable law.

**12.6 Successors and Assigns.** Any and all covenants, promises and agreements set forth in this Agreement shall bind and inure to the benefit of the respective successors and assigns of the parties hereto, including, without limitation, any subsequent owner of the land and improvements in the District and any assignee, whether absolutely or collaterally, of the TRID Note.

**12.7 Captions.** The captions preceding the various Articles and Sections of the Agreement have been inserted solely for convenience of reference and shall not be used in construing this Agreement.

**12.8 Counterparts.** This Agreement may be executed in two or more counterparts, each of which shall be deemed an original, but all of which taken together shall constitute one and the same agreement.

**12.9 Governing Law.** This Agreement and the TRID Note, and the instruments and documents being delivered pursuant hereto, shall be construed by, and enforced in accordance with, the laws of the Commonwealth of Pennsylvania without giving effect to the principles of conflicts of law.

**12.10 Reference to Documents.** All references to any document referred to or described herein shall be deemed to refer to such documents as they may be substituted, replaced, amended, modified or recast from time to time whether or not in connection with any Substitute Loan.

**12.11 Notices.** All notices, requests, demands and other communications required or permitted under this Agreement shall be in writing and shall be sent by hand delivery or by registered or certified mail, postage prepaid, return receipt requested, or by recognized overnight courier service, addressed to the appropriate party at the following addresses (or at such other address as the respective party may hereafter designate by notice in writing in the manner specified above):

To Management Entity:           Bryn Mawr TRID Authority.  
  Attention: Chairman<sup>17</sup>

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<sup>17</sup> The address and name of the TRID Board chairman will be filled in once known.

with a copy to: The Management Entity's Counsel<sup>18</sup>

To Lender:<sup>19</sup>

Copy to: Lender's Counsel<sup>20</sup>

To RAMC: Redevelopment Authority of Montgomery County  
104 W. Main Street  
Norristown, PA 19401  
Attn: John F. Nugent, Executive Director

Copy to: Bruce A. Nicholson, Esquire  
Solicitor  
Duffy, North, Wilson, Thomas & Nicholson  
104 North York Road  
Hatboro, PA 19040

To the Township: Douglas S. Cleland  
Township Manager  
Lower Merion Township  
75 E. Lancaster Avenue  
Ardmore, PA 19003

Dean Dortone  
Director of Finance  
Lower Merion Township  
75 E. Lancaster Avenue  
Ardmore, PA 19003

Copy to: Gilbert P. High, Jr., Esquire  
Township Solicitor  
High Swartz LLP  
40 East Airy Street  
Norristown, PA 19404

To the School District: Dr. Christopher W. McGinley  
Superintendent  
Lower Merion School District  
301 E. Montgomery Avenue  
Ardmore, PA 19003

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<sup>18</sup> The name and contact information of the Management entity's Counsel will be filled in once known.

<sup>19</sup> The name and contact information of the Lender will be filled in once known.

<sup>20</sup> The name and contact information of the Lender's Counsel will be filled in once known.

Copy to:

School District Solicitor  
Lower Merion School District  
301 E. Montgomery Avenue  
Ardmore, PA 19003

All such notices, requests and other communications shall be deemed to have been sufficiently given on the date delivered or refused. Any notice, request or other communication may be given on behalf of any party by its respective counsel.

**12.12 Indemnification.** Management Entity will indemnify and hold harmless RAMC and each member, director, officer, employee, attorney and agent of RAMC for and against any and all claims, losses, damages or liabilities (including the reasonable costs and expenses of defending against any such claims) to which RAMC or any member, director, officer, employee or agent of RAMC may become subject, insofar as such losses, claims, damages or liabilities (or actions in respect thereof) arise directly or indirectly out of and which are not the result of gross negligence or bad faith on the part of any of the foregoing, any loss or damage to property or injury to or death of or loss by any person that may be occasioned by any cause whatsoever pertaining to the Project or this Agreement or the TRID Note or the transactions contemplated thereby.

In case any action or proceeding is brought against RAMC in respect of which indemnity may be sought hereunder, RAMC shall give written notice of that action or proceeding to the Management Entity, and the Management Entity upon receipt of that notice shall have the obligation and the right to assume the defense of the action or proceeding; provided that failure of RAMC to give that notice shall not relieve the Management Entity from any of its obligations under this Section 12.12 unless (and then only to the extent) that failure prejudices the defense of the action or proceeding by the Management Entity.

The indemnification set forth above is intended to and shall (i) include the indemnification of all affected directors, officers, agents and employees of RAMC, and (ii) be enforceable by RAMC to the fullest extent permitted by law. This Section 12.12 shall survive the termination of this Agreement.

IN WITNESS WHEREOF, each party to this Agreement has caused this Agreement to be duly executed on its behalf by its duly authorized representatives as document under seal, all as of the day and year first above written.

THE TOWNSHIP OF LOWER MERION  
ARDMORE, PENNSYLVANIA

By:

Name: Douglas S. Cleland

Title: Township Manager

THE SOUTHEASTERN PENNSYLVANIA  
TRANSPORTATION AUTHORITY

By:

Name: Rich Burnfield

Title: Chief Financial Officer

THE LOWER MERION SCHOOL  
DISTRICT

By:

Name: Dr. Christopher W. McGinley

Title: Superintendent

REDEVELOPMENT AUTHORITY OF  
MONTGOMERY COUNTY

By:

Name: John F. Nugent

Title: Executive Director

Lender

By:

Name:

Title:

BRYN MAWR TRID AUTHORITY

By:

Name:

Title: Chairman

**EXHIBIT A**

TRID Planning Study

**EXHIBIT B**

Copy of Lower Merion Township Ordinance Establishing TRID Management Entity

**EXHIBIT C**

TRID Fund Pledge Agreement

**EXHIBIT D**

TRID District Boundary Description, List of Parcels, and Map

**EXHIBIT E**

TRID Note

## General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this report are accurate as of the date of this study; however, factors exist that are outside the control of Economics Research Associates, an AECOM company (ERA) and that may affect the estimates and/or projections noted herein. This study is based on estimates, assumptions and other information developed by Economics Research Associates from its independent research effort, general knowledge of the industry, and information provided by and consultations with the client and the client's representatives. No responsibility is assumed for inaccuracies in reporting by the client, the client's agent and representatives, or any other data source used in preparing or presenting this study.

This report is based on information that was current as of December 2008 and data collected in 2007 and 2008 and Economics Research Associates has not undertaken any update of its research effort since such date.

Because future events and circumstances, many of which are not known as of the date of this study, may affect the estimates contained therein, no warranty or representation is made by Economics Research Associates that any of the projected values or results contained in this study will actually be achieved.

Possession of this study does not carry with it the right of publication thereof or to use the name of "Economics Research Associates" in any manner without first obtaining the prior written consent of Economics Research Associates. No abstracting, excerpting or summarization of this study may be made without first obtaining the prior written consent of Economics Research Associates. This report is not to be used in conjunction with any public or private offering of securities, debt, equity, or other similar purpose where it may be relied upon to any degree by any person other than the client, nor is any third party entitled to rely upon this report, without first obtaining the prior written consent of Economics Research Associates. 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 Economics Research Associates.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.