

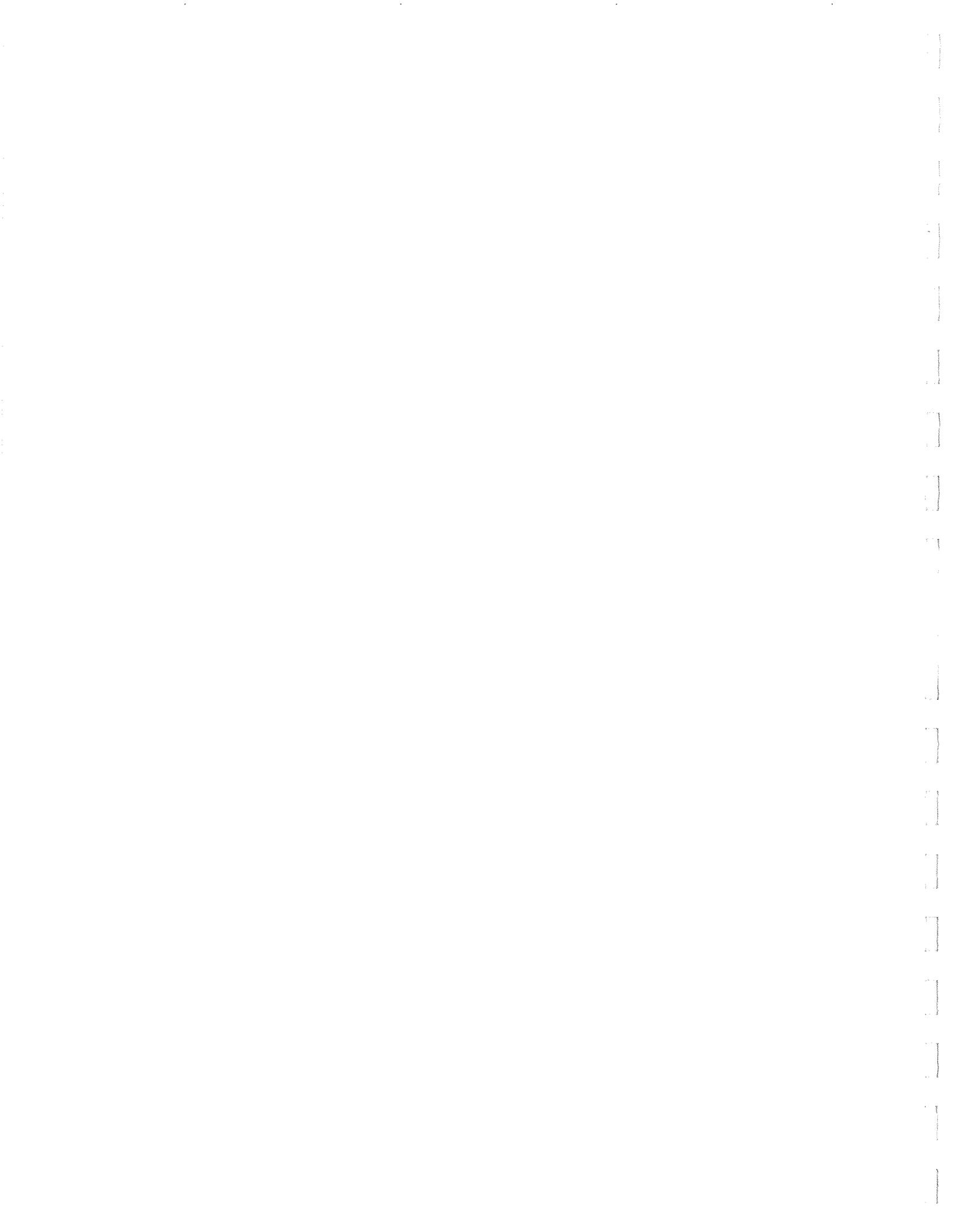


prepared by Wallace Roberts & Todd, LLC  
May 2007

# Downtown Destination Plan

## Borough of Lansdale





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# I. INTRODUCTION





## I. Introduction

The Downtown Destination Plan builds upon Lansdale’s 2001 Revitalization Plan and Lansdale’s 2006 Comprehensive Plan. The Plan builds on downtown’s current strengths. Some of these strengths were revealed through an assessment of current conditions in the Main Street Business District, others include planned and proposed actions such as the Performing Arts Center, street tree program and significant private investment in new residential and retail development. The Plan also contains a strategic action agenda to better position the Business District to build on its assets.

The study area for the Plan, bounded by 5th Street to the northeast, just shy of West End Drive to the northwest, Columbia Avenue to the southwest, and midway between Broad Street and Chestnut Street to the southeast, contains the Borough’s major transportation and commercial uses. A core area highlighted in Figure 1 is the focus of more detailed planning.

The Downtown Destination Plan’s study area encompasses the civic, transportation, and commercial core of the Borough. South of Market Street, between Broad Street and Susquehanna Street, is a cluster of municipal services, including Borough Hall, the public library, the police station, the fire station, and the post office. Main Street and parts of Broad Street house the largest concentration of retail stores and services in the Borough. Just west of the intersection of Broad and Main Streets is the Lansdale train station.

This strategic downtown plan for the Business District takes advantage of its road and rail access, potential as a regional destination, and traditional “Main Street” setting. The Plan identifies transportation and other development improvements to inspire investment in the downtown.

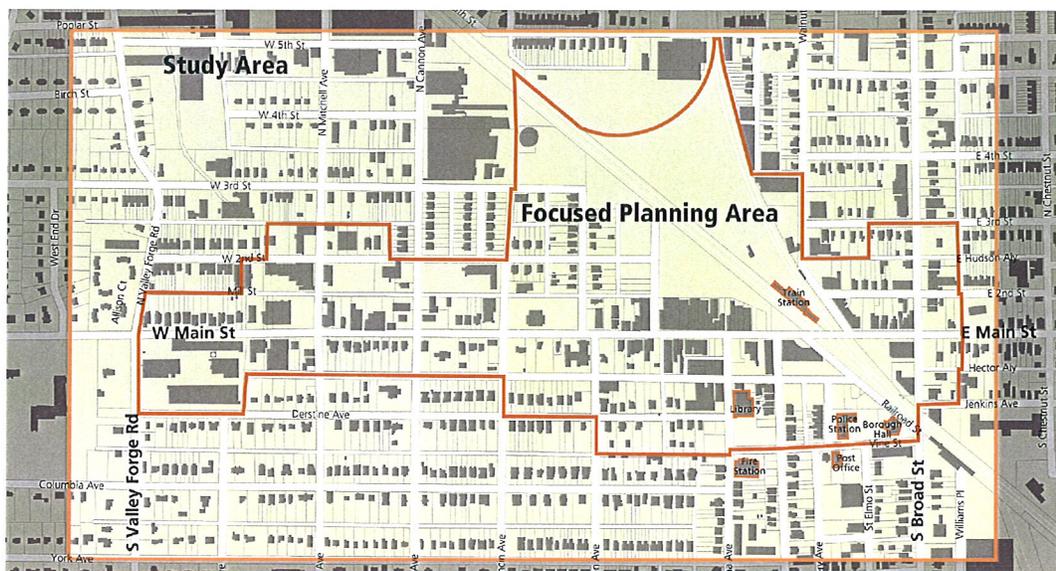


Figure 1 Study Area

Data Sources: Borough of Lansdale, DVRPC, US Census Bureau  
 0 0.025 0.05 0.1 0.15 0.2 Miles

## **II. EXISTING CONDITIONS**

## II. Existing Conditions

### Regional Setting

Lansdale municipality, approximately 3 square miles, is located in southeastern Pennsylvania's Montgomery County, about 35 miles northwest of Center City Philadelphia. It is at the center of one of the fastest growing areas in Montgomery County, the North Penn region, which also includes Hatfield Borough, North Wales Borough, Hatfield Township, Montgomery Township, Towamencin Township, and Upper Gwynedd Township.

Although Lansdale has little undeveloped land left, rapid growth in the surrounding municipalities will surely impact the Borough. As more people move to the North Penn area, the demand for additional services will increase.

The North Penn area's major transportation corridors include the Northeast Extension of the Pennsylvania Turnpike, PA Route 309, Route 202, and the SEPTA R5 rail line. These corridors give Lansdale access to numerous employment centers, including Center City Philadelphia, Fort Washington, Norristown, King of Prussia, and Collegeville. Lansdale itself is considered one of the largest employment centers in Montgomery County, providing more than 9,500 jobs. PA Route 63 (Main Street) and Broad Street carry a significant amount of regional traffic and serve as the main crossroads of the study area.

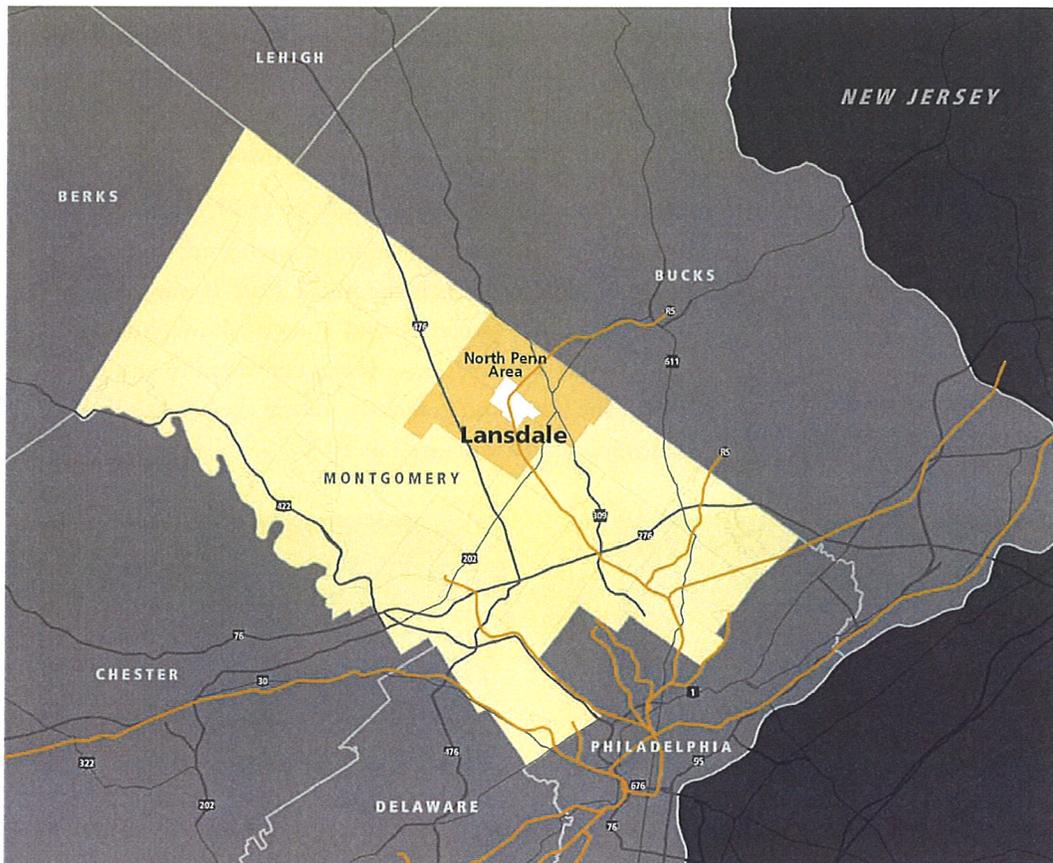


Figure 2 Regional Context

## Historical Context

based on "Brief History of Downtown Lansdale," compiled by Richard Shearer, president of the Lansdale Historical Society

Before European contact, vast fields and woods covered Montgomery County inhabited by the Lenni Lenape Indians. Lansdale remained undeveloped until the early 1850s when the North Pennsylvania Railroad started construction on an extension of its route between Philadelphia and Fort Washington to Bethlehem, with a spur to Doylestown. The junction of the Bethlehem and Doylestown lines is the site of what today is the SEPTA station on West Main Street.

Construction of the railroad required workers, who in turn required nearby housing and services. By the time of the Civil War, Lansdale's downtown had begun to take shape. Most of the early downtown development took place on West Main Street. Hotels, feed stores, grocery stores, blacksmiths, carriage makers, and other service businesses established themselves in Lansdale. In 1864, the Lansdale National Bank was established to underwrite the businesses and homes springing up around the train station, and in 1871 the residents of Lansdale formed an independent school district.

The town was incorporated with 500 residents in 1872, taking land from Hatfield and Gwynedd Townships. It was named after the chief surveyor for the North Pennsylvania Railroad, Philip Lansdale Fox.

Within 10 years of incorporation, Lansdale's population increased 60 percent as more businesses and diversified industry sprang up. Lansdale's biggest industry was the Heebner Agricultural Works, known worldwide for its horse-powered farm equipment. Another major business was A.C. Godshall's Centennial Mills, a large flour, grain, and seed operation. To the northeast of mid-town was the Abram Cox Stove Works as well as a number of foundries that brought additional residents to town. Temporary merchants set up permanent shops, making clothing shops, bakeries, and general merchandise stores fixtures of downtown Lansdale.

Downtown Lansdale was a cultural and entertainment center. Built in 1880, Freed's Hall housed an auditorium that served as a gathering space for fledgling churches and fraternal organizations. The first authentic entertainment venue was the Music Hall. It was built in 1887 to house the Lansdale Symphony Orchestra, vaudeville and minstrel shows, boxing matches, religious revivals, and school plays and graduations. It was converted to a movie house in the 1920s and closed in 1967. The last – and grandest – movie theater was the Lansdale Theater at Main and Towamencin, which was razed in 1979.



Figure 3 Lansdale Train Station



Figure 4 Main Street c. 1907

A number of fraternal organizations established headquarters in buildings downtown. The most elaborate was the Masonic Hall, built in 1913 by Shiloh Lodge 558. The Main Street façade of the building is little changed from the way it looked the day it was dedicated.

Even with the coming of the automobile, downtown Lansdale remained the commercial hub of the region until the 1960s. The train and Liberty Bell trolley kept retail business humming. General stores gave way to grocery stores, including the original Main Street Clemens Market. Clothing stores, lucheonettes and diners, five and dimes, and furniture stores gave residents and visitors plenty of retail opportunities. On a typical Friday or Saturday, the sidewalks of Lansdale were packed with shoppers, many of them traveling from other expanding railroad towns.

Like many other towns, Lansdale began losing its status as a commercial center shortly after World War II. With widespread adoption of the automobile and the construction of larger roadways through the area, including the Northeast Extension of the Pennsylvania Turnpike and PA Route 309, the North Penn region around Lansdale saw increased population growth. Lansdale tried to adapt to automobile-oriented consumers by building the Madison Parking Lot in the mid-1950s. But downtown traffic congestion and frequent delays caused by trains passing through eventually proved too much.

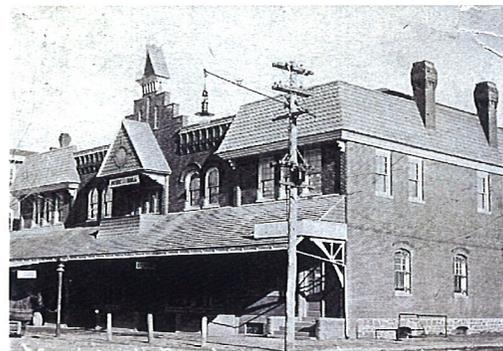
In the 1960s, the Borough demolished about 60 older downtown buildings as part of a redevelopment project intended to spark mid-rise development in downtown. The only viable project that resulted from this action was the Century Plaza building; no other mid-rise structures followed.

Grocery stores were among the first to leave, moving to stand-alone buildings or strip shopping centers. But, the biggest blow came in the late 1970s when Montgomery Mall opened only three miles from downtown Lansdale. Soon after, most of the remaining chain stores as well as many long-established independent stores closed or relocated.

Today, Lansdale still retains a core of service-related businesses. The downtown area has benefited from attractive streetscape programs and new parks, as well as renovation of the 1903 rail station. There also appears to be renewed investment interest in downtown consistent with Main Street revitalization trends nationally.



*Figure 5 Main Street Today near  
Susquehanna Avenue*



*Figure 6 Music Hall at N. Broad and  
E. 2nd Street c. 1895*

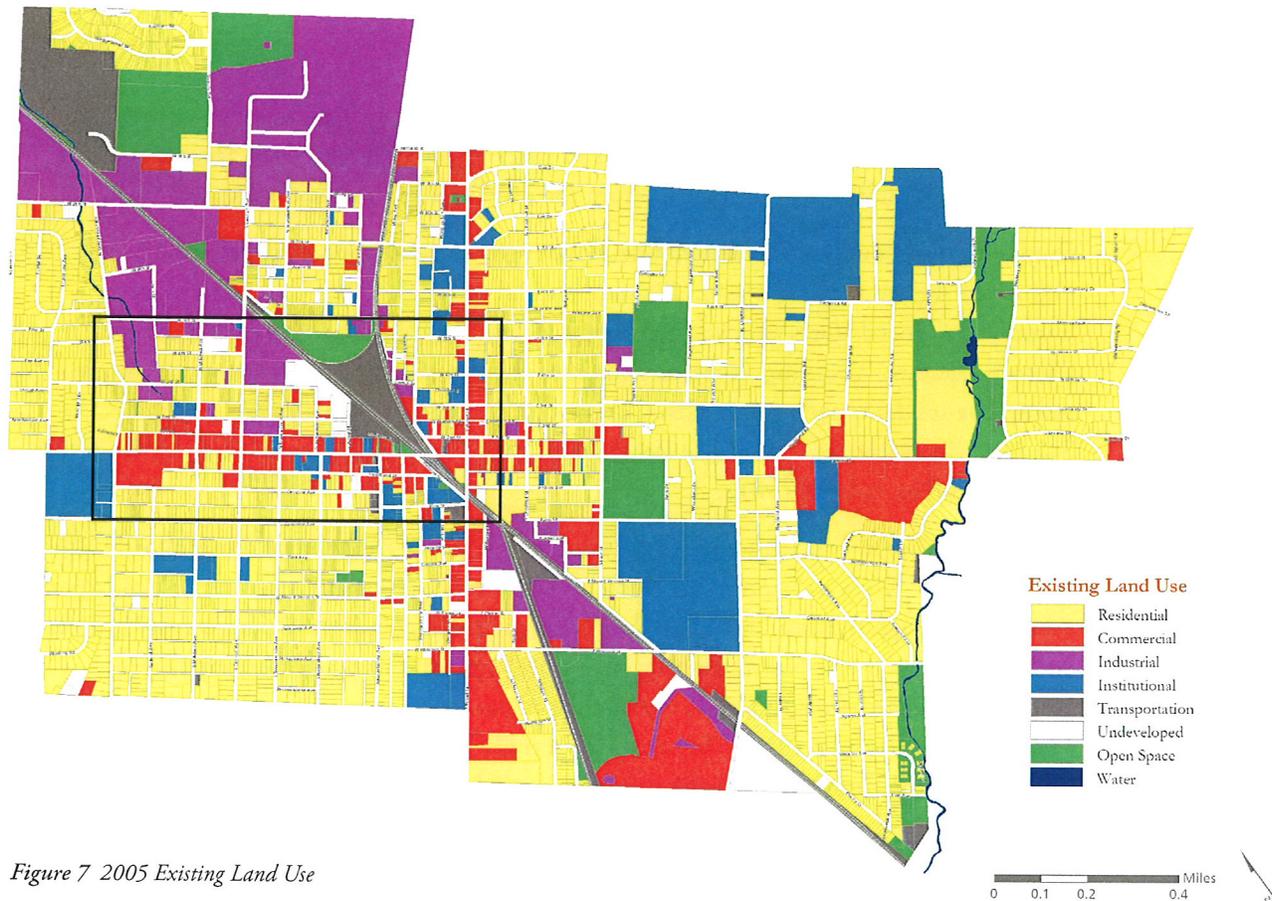


Figure 7 2005 Existing Land Use

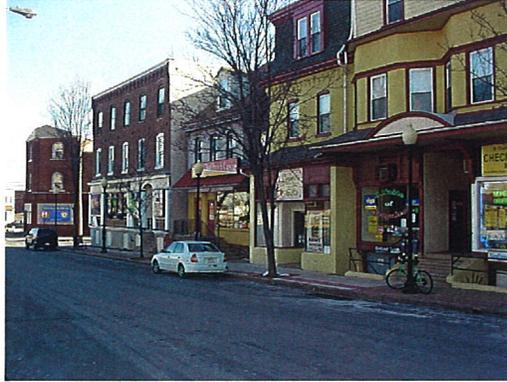
## Existing Land Use

Lansdale’s pattern of land use centers on the train station. The area surrounding the train station has the highest concentration of retail uses, with other commercial activity extending out from this area along Main and Broad Streets.

Near the train station, many buildings are attached and the density is higher. Moving away from the train station, there is a transition in density to semi-detached buildings, small freestanding buildings, and larger strip shopping areas.

Lansdale has a variety of housing types and densities, with a mix of single-family homes and twin homes comprising the large majority of its housing stock. Still, there is a moderate amount of density in Lansdale, with row homes and apartment buildings located on or within two blocks of Main Street and Broad Street. Although multi-family housing comprises the smallest housing sector in Lansdale, this sector has shown the greatest growth over the past decade. Lansdale’s lower density neighborhoods typically have well-connected street grids that differ from the prevalent cul-de-sacs in surrounding municipalities.

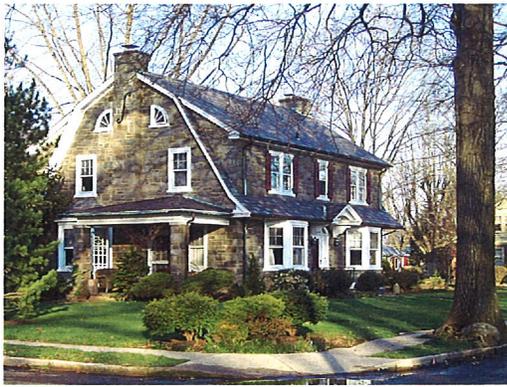
Once home to a number of manufacturing plants, Lansdale’s industrial base has diminished over time, along with its associated 1,500 jobs and significant tax revenue. The exception is the Lansdale electric company, one of only 35 municipal electric companies in Pennsylvania, which has been servicing Lansdale for over a century.



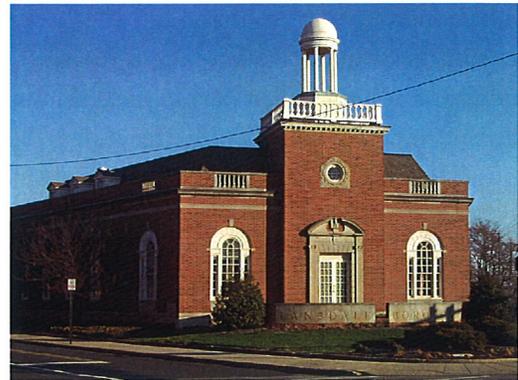
*Figure 8 Higher Density Buildings around the Train Station*



*Figure 10 Memorial Park*



*Figure 9 Traditional Residential Neighborhood*



*Figure 11 Borough Hall*

Lansdale has been able to strengthen its system of parks over the past decade, increasing the amount of publicly-owned park land by more than a quarter to over 120 acres. Combining the publicly-owned park land with other private recreational facilities, Lansdale has a comprehensive system of parks, ball fields, swimming pools, and trails. Lansdale's Subdivision and Land Development Ordinance has provisions designed to encourage developers to augment the Borough's parks and recreation system. Future efforts to enhance the parks and recreation system in the Borough will focus on strengthening the connections between existing facilities. Railroad Plaza, adjacent to the train station, has the potential to be a downtown focal point as part of this system.

In its 1973 Comprehensive Plan, Lansdale vowed to strengthen its position as the urban center of the North Penn region. In its 2006 Comprehensive Plan, the Borough shifted its focus from strengthening to maintaining its position as a regional center. Looking forward, Lansdale must be able to reconcile new development opportunities with its distinctive dense, walkable, mixed-use core. The Borough's current revitalization plans are attempting to attract residents and employment to Lansdale by modernizing idle properties and fostering new mixed-use development.

## Population

In 2000, Lansdale had just over 16,000 residents. The Borough's population has declined since its peak of about 18,500 in the 1970s, due to a lack of vacant land and changing views of desirable housing types. In contrast, surrounding municipalities have grown tremendously over the past decade as their large amount of available land has been developed to meet the demand for suburban housing in the North Penn area. The Delaware Valley Regional Planning Commission estimated that Lansdale's population stabilized in 2003 and projects that the Borough's population will increase through 2015. This is confirmed by a number of new residential and mixed-use developments in the Borough, including Station Square, the Pavilion, the Village at West Main Street, Anndale Green, and the Silk Factory.

Lansdale has experienced a number of trends between 1990 and 2000 that are consistent with communities across the country. The Borough's average household size declined between 1990 and 2000, keeping the number of households similar over the same time period. In addition, there was an increase in non-family households that balanced a similar decrease in family households. This shift is due to a greater number of single-person households and households of unrelated people.

Lansdale's population achieved a higher level of education in 2000 than its population did in 1990, with greater numbers of people completing high school, attending some college, and earning Bachelor's degrees.

The median age in Lansdale is higher than that of Montgomery County, which can be explained by the Borough's aging population and the attraction of younger families to suburban housing in surrounding communities.

Figure 12: Lansdale's Population 1990 - 2025

YEAR	POPULATION	CHANGE
1990	16,362	
2000	16,071	-291
2005	16,200	+129
2010	16,310	+110
2015	16,440	+130
2020	16,420	-20
2025	16,410	-10

Source: U.S. Census Bureau; Census of Population & Housing, 2000; DVRPC Projections (2005-2025)

## Market Trends

The market sectors that are currently leading job growth in Montgomery County are: finance, insurance, and real estate; professional and technical services; and education and health care. Arts, entertainment, recreation, and related services have also experienced some job growth in recent years. Because of the expected growth in the North Penn region between 2000 and 2020, these sectors, which offer a variety of professional and/or business services to families and businesses, are good candidates for expansion in Lansdale as well.

Lansdale needs to capture this growth within its borders. Its assets include:

- Excellent train service, and therefore regional access for workers;
- Inexpensive electricity;
- A business friendly climate;
- Good regional highway access;
- A major international corporation next door;
- A sense of place.

Lansdale is an excellent location for small office users who require anywhere from 500 to 5,000 square feet of space, although the bulk of that market is likely to require less than 2,500 square feet. Typical users would be small businesses that provide services to other businesses, including everything from accounting and legal services to graphic design and copier repair, and businesses that offer services to North Penn residents. These services could range from insurance to financial services to real estate and medical services. Achievable rents are likely to be approximately \$20 per square foot.

The Borough's proposed regional arts center should be catalyst for increased retail activity. There is a net outflow of retail dollars from the Borough of about \$73,409,000. This net outflow is concentrated in specialty food stores, luggage and leather goods, florists, office supplies, gift, novelty, and souvenir shops, and other miscellaneous shops, which can include pet, art and art supplies, tobacco, and other small users of retail space. The arts center should serve as catalyst for this type of retailing, including materials and supplies for the creative and performing arts.

The largest opportunity that is evident for both Lansdale and the entire North Penn region is food service and drinking. The Borough loses an estimated \$15,621,000 in this category per year, and the North Penn region loses over \$20,000,000 per year. This is an obvious market niche for Lansdale, and one that will also support and be supported by the regional arts center.

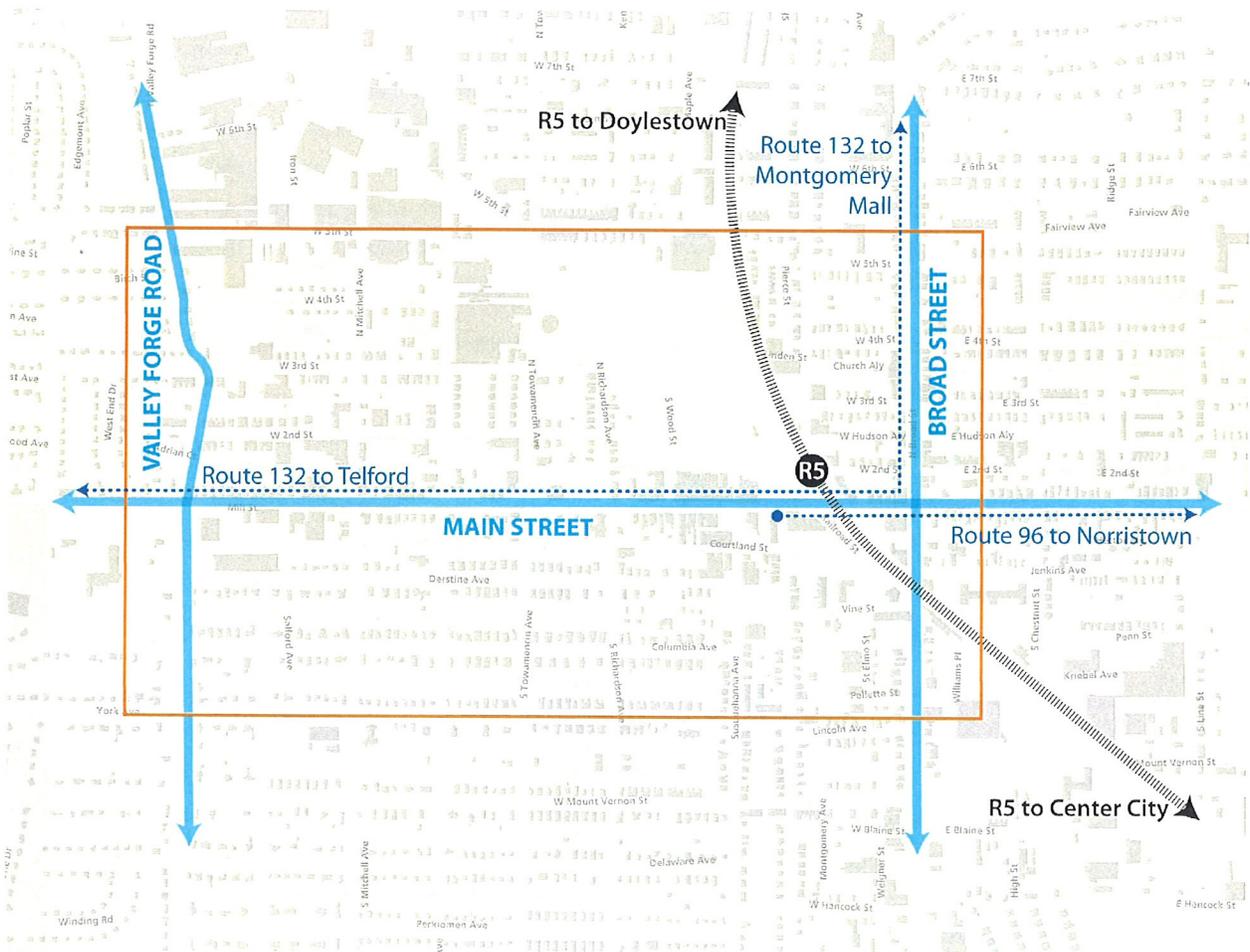


Figure 13 Circulation Elements

## Circulation

According to PennDOT’s functional classification system of streets, Lansdale has major arterials, a minor arterial, major collectors, and local roads. Not surprisingly, Main Street and South Valley Forge Road are classified as major arterials, and Broad Street is classified as a minor arterial. The importance of these roads is confirmed by examining average daily traffic volumes, which show that Routes 63 and 363 are the most heavily travelled roads in the Borough.

Significant population and employment increases in the North Penn region and beyond have contributed to increasing traffic congestion on regional corridors, including Main Street. The intersections of Main Street with Broad Street, Valley Forge Road, Church Road, and North Wales Road experience the worst congestion problems. At the intersection of Main Street and Broad Street, heavy traffic is exacerbated by the railroad crossings west and south of the intersection.

The Borough has taken measures to maximize the efficiency of its roadways, including the addition of left turn lanes at high volume intersections and the installation of a closed loop signal system to optimize traffic operations.

Lansdale is served by the SEPTA R5 regional rail line and three SEPTA bus routes, Route 94, Route 96, and Route 132. The R5 has the highest daily ridership of all the SEPTA regional rail lines. The line provides service between Thorndale in Chester County and Doylestown in Bucks County, with stops at significant activity centers in Chester, Bucks, Montgomery, and Philadelphia Counties. The bus routes connect Lansdale with Philadelphia, the Montgomery Mall, Norristown, and Telford.

Pedestrians are accommodated through an extensive sidewalk network along a majority of the roads and streets in Lansdale. The sidewalks provide an important link between residential areas, shopping, schools, parks, bus stops, and train stations.

Main Street and Valley Forge Road are designated as primary bicycle routes by the Montgomery County Planning Commission as part of its county-wide bicycle network. A number of other roadways in the Borough are classified as secondary routes in the network. The Montgomery County Comprehensive Plan lists several recreational, civic, employment, and commercial destinations within the Borough that can attract bicycle traffic if appropriate facilities are provided.

Although Lansdale is not currently served by any recreational trails, several proposals exist for trails that would connect to the Borough. Green Ribbon Preserve is a combination of open space and trail access easements along the Wissahickon Creek from Montgomery Township to Fairmount Park, including the segment of the creek through Lansdale. Liberty Bell Trail is a county trail that has been studied for several years and is based on the alignment of the old Liberty Bell Trolley line from Norristown to Quakertown. The trail would enter the Borough near Stony Creek Park and exit to the north in Hatfield Township near 8th Street.

The majority of streets in Lansdale allow for on-street parking, and meters are installed in several locations. In addition, the Borough owns nine off-street parking lots. As revitalization efforts are implemented in Lansdale, it will be important to monitor parking supply and demand.

### **Planning Implications**

Projections of an increase in population and the flurry of new development occurring in the Borough are evidence of Lansdale's desirability as a place to live, work, and do business. In order to capitalize on this expected growth, Lansdale must have a vision for its downtown and a way of implementing that vision. This will ensure that the Borough sees the right type of development in the right locations.

Lansdale is a desirable place to live, work, and do business because of its great transportation access, scale of development, walkable character, and its services. The Borough must recognize its role as not just the geographic center of the North Penn region, but as a commercial, civic, and cultural core of the region by supporting existing institutions and paving the way for new ones.

Although Lansdale is thought of as being built-out, there are many opportunities for new development and redevelopment in the Borough. Within the study area, there is an abundance of parking and vacant and underutilized properties, many of which are owned by the Borough. With a vision for its downtown, Lansdale can strategically develop these properties to reach that vision.



*Figure 14 Borough Parking Lot on Main Street*



*Figure 15 Brownfield Redevelopment Site on Main Street*

### **III. VISION**





## **Goals for Downtown Lansdale**

The Borough of Lansdale, through a series of public meetings, identified a number of objectives and strategies in the July 2006 Comprehensive Plan. Some of these goals are particularly relevant to the needs of downtown Lansdale and helped shape the vision and concepts in this report. They are:

### **Economic Development & Revitalization**

Improve and enhance the downtown to recreate a strong business district that serves as an attractive hub for Lansdale Borough and a viable destination for the surrounding region.

### **Residential**

- Existing Residential Neighborhoods:  
Maintain existing walkable neighborhoods, and protect their character.
- Housing Stock:  
Preserve the character and charm of existing neighborhoods and houses.

### **Transportation**

- Train Station Area (and Madison Avenue Parking Lot):  
Beautify the Train Station Area, provide improved services in and around the Train Station, and expand parking opportunities at the Madison Lot close to the Train Station.
- Parking:  
Provide additional parking opportunities in the Downtown, in the Main and Broad Street commercial areas, and in high density residential developments.
- Streets:  
Continue Borough initiatives in street reconstruction and maintenance.
- Alleys:  
Continue to utilize alleys and secondary streets to enhance circulation through the Borough.

### **Industrial**

- Redevelopment of Vacant Land/Buildings:  
Adaptively reuse existing noteworthy buildings, revitalize sites that are vacant, and create new attractive development in scale and proportion to the traditional character of the Borough.
- Reuse of Abandoned Industrial Land:  
Create new uses at abandoned industrial sites to add value to Lansdale Borough for needed parking, commerce and/or recreation.

## **Recreation and Open Space**

- Existing and Future Land Use Parks and Recreation Areas:  
Maintain and enhance existing parks and recreation areas, upgrade the landscaping, and expand programs for persons of all ages.
- Community Facilities:  
Maintain and enhance existing community facilities such as Borough Hall, the Police Station, Library, Schools, Municipal Parking, Parks & Recreation Areas, and other civic assets.

## **Historic and Cultural Preservation**

- Historic Resource Protection:  
Protect and preserve historic resources in order to maintain the character and charm of the Borough.
- Cultural and Hospitality Development:  
Enrich the quality of life in Lansdale Borough through cultural resource development and hospitality.
- Wayfinding and Signage:  
Enhance wayfinding in Lansdale through improved signage.

## **Administrative**

- Zoning Ordinance Revisions:  
Revise and refine the Zoning Ordinance to better match existing buildings and conditions, and to be more conducive to businesses.

## **IV. CONCEPT PLAN**

## IV. Downtown Lansdale Concept Plan

### Land Use

#### Existing and Future Land Use

The land use character along the Borough's Main Street corridor varies widely between Broad Street and Valley Forge Road as shown in Figure 18. At the eastern end of the corridor, Main Street is a major access point for the SEPTA train station. This area has a more urban character with greater building heights, buildings abutting the sidewalk with small storefronts on the first floor and office and/or residential uses on upper floors. Railroad Plaza is an open space and gathering spot for this segment of Main Street. Parking in this area is concentrated to the side or rear of properties with several municipal lots to serve Main Street. The railroad crossing on Main Street is a major land use which provides important transportation access, but also creates a barrier for circulation along Main Street.

The central section of the Main Street corridor from Richardson Avenue to Mitchell Avenue is a mix of commercial small businesses, residential and surface parking lots. Buildings are set back from the sidewalk and many of the structures in this segment of the corridor are former residential structures that have been adapted for commercial use breaking the streetscape continuity present in the eastern section.

The land use character changes again in the western portion of the corridor beginning at Mitchell Avenue. A small commercial shopping center at Mitchell Avenue and Main Street contains larger, more suburban, commercial buildings. This center combined with the new Village at West Main Street commercial center at the corner of Main Street and Valley Forge Road anchors this neighborhood shopping area at the western end of Main Street.

Building on this existing context, the future land use concept in Figure 19 depicts two mixed use, commercial areas along Main Street, the downtown center and west gateway, that are linked by a segment of Main Street called the connector. These districts are surrounding by a fourth zone of residential neighborhoods that are served by and linked to the Main Street corridor.

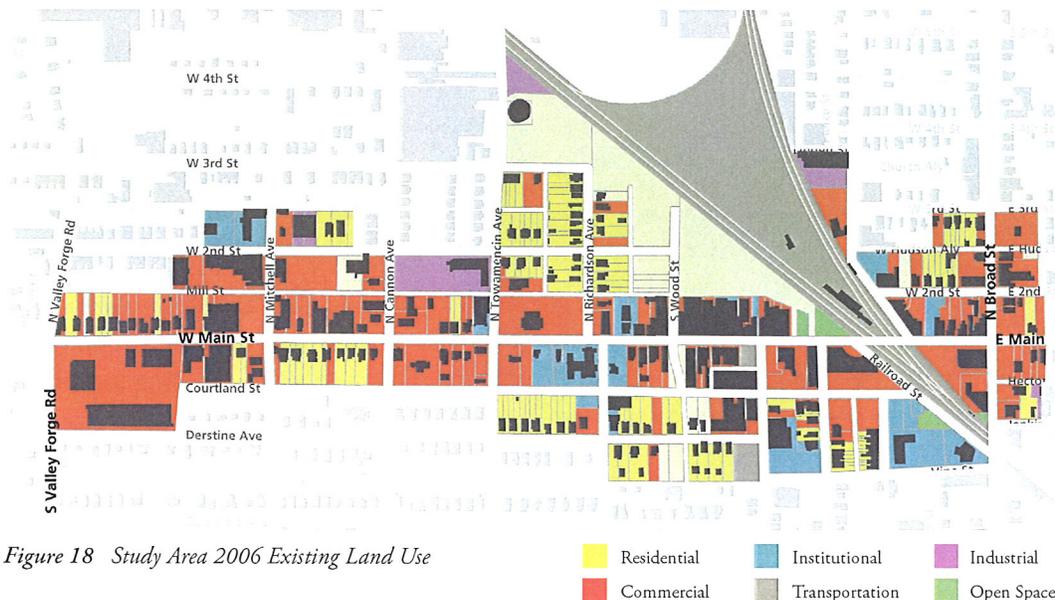


Figure 18 Study Area 2006 Existing Land Use

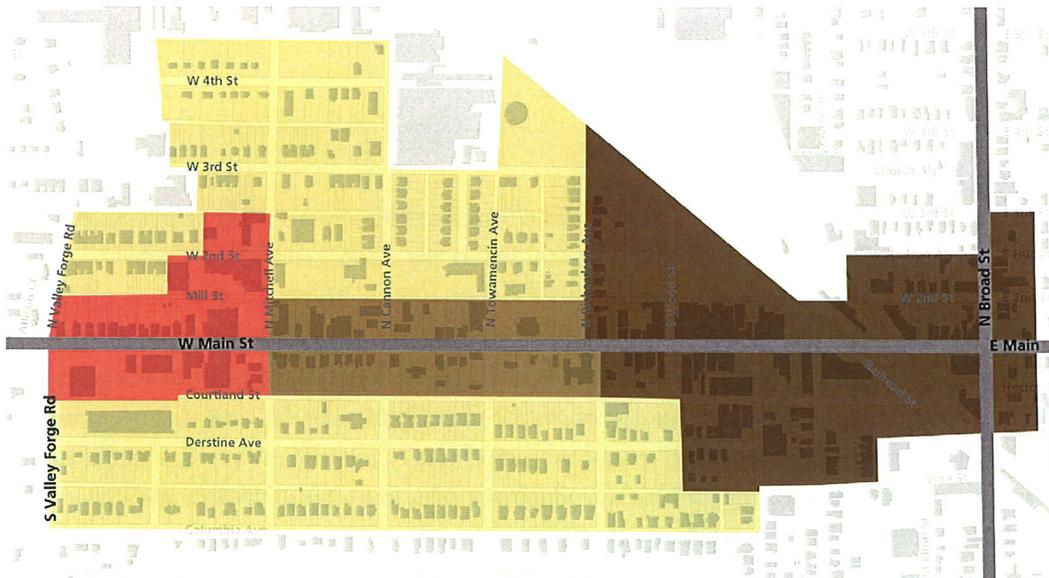


Figure 19 Proposed Future Land Use

- Downtown Center
- West Gateway
- Connector
- Residential

### Downtown Center

The Downtown Center located between Broad Street and Richardson Avenue is proposed to be a vibrant, mixed use area providing cultural, entertainment and niche retail for the greater North Penn region anchored by the Borough’s proposed Performing Arts Center and the Library. Land uses in this area should be intensified with increased building heights, encouraging the redevelopment of underutilized properties (especially parking lots) and allowing greater employment and residential densities to promote active street life and increased commerce. (See the development guidelines chart in Figure 23 for additional information.)

This center also is an important transportation hub for the North Penn region, bringing high levels of suburban commuter traffic and increased pedestrian activity. The streetscape should be dynamic, framed by building facades abutting the sidewalk that contain inviting commercial uses on the ground floor. The intersection of Main and Broad Streets should be framed by 2-3 story, landmark buildings defining this intersection as the major crossroads in the

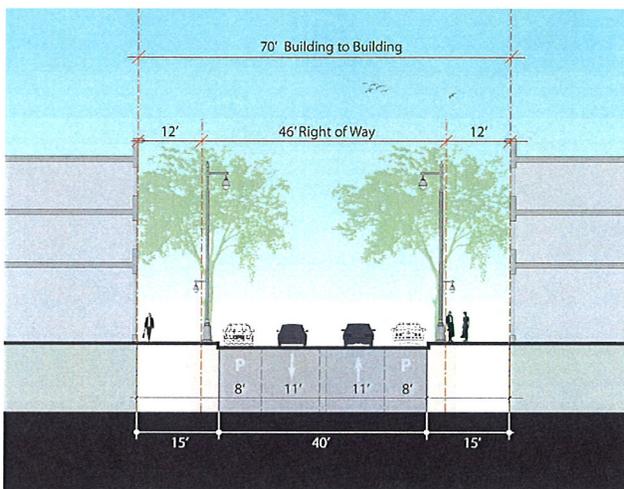


Figure 20 Typical Downtown Streetscape Section

Borough and the east gateway to the Downtown Center. To further unify this district additional street improvements such as crosswalks, signage and building lighting should be considered.

The railroad crossing creates a barrier, especially for pedestrians, on Main Street because it is such a wide, unprotected area. Vacant land adjacent to the rail line at Madison Avenue and Main



*Figure 21 Inviting Downtown Setting*

Street and the current parking lot of Rite Aid reinforces this pedestrian unfriendly environment. These areas should be redeveloped with structures to narrow this gap and an improved pedestrian crossing should be installed.

Parking in the Downtown Center should be maintained on-street and to the rear of the buildings. As land use intensifies in the Center, structured parking facilities will be required (See the circulation concept plan for additional details on parking facilities).

### The Connector

This part of Main Street from Richardson Avenue to Mitchell Avenue will transition the Borough's new downtown environment to the more localized commercial uses on Main Street. The building scale should be reduced to be more consistent with the adjacent neighborhoods. Future land uses recommended in this area are small offices, freestanding retail and personal service uses to encourage adaptive reuse of existing (mostly residential) structures. These uses will be attracted to this location because of the traffic and visibility of Main Street and proximity to Lansdale's revitalized downtown. On-street parking should be retained and other parking should be accessed from alleyways to serve these properties. This strategy will maintain the small town character and walkability of this portion of Main Street. (See the development guidelines chart in Figure 23 for additional information.)

### West Gateway

Two small commercial centers and a number of other individual retail enterprises are part of a growing neighborhood shopping district on this section of West Main Street. It is recommended that new buildings in this area be 2 to 3 stories in height, with minimal



Figure 22 *The Village at West Main*

setbacks from the sidewalk and parking located to the side or rear. (See the development guidelines chart on page IV.4 for additional information.) To support the pedestrian character of this center the first floor of buildings should have inviting commercial uses, and streetscape improvements such as new pedestrian lighting, street furniture and street trees should be considered. An example of these features is the new development, The Village at West Main, at the corner of Valley Forge Road and Main Street, it has greatly improved the character and retail offerings in the West Gateway with a new Starbucks and a 2-story commercial/office building directly adjacent to the sidewalk. Other important features include locating most of the parking to the side and rear of the complex and providing attractive lighting and landscaping to enhance the streetscape.

The other small commercial center in the West Gateway at the corner of Mitchell Avenue and Main Street is also a significant opportunity. This center has the potential to be a substantial mixed use development with new commercial uses along Main Street and other uses located along Mill and Second Streets, including new residential units adjacent to the existing residential neighborhood.

## Residential

The residential areas surrounding the Main Street corridor on both sides have a diversity of housing types, including rowhomes, twins and single-family dwellings. These neighborhoods are generally healthy and offer an attractive traditional neighborhood setting. This Plan recommends maintaining the existing land use character and walkability of these neighborhoods in support of the Borough's goals in its 2006 Comprehensive Plan. The transportation and green infrastructure elements of this Plan address linkages and enhanced pedestrian access between Main Street and these residential districts.

## Future Development Guidelines

In order to achieve the Vision for Downtown Lansdale a set of development guidelines is provided in the chart at right. These guidelines are offered as a starting point for creating more detailed land use policy and development regulations as part of implementing this Plan.

*Figure 23 Development Guidelines*

<b>Mix of Uses:</b>	Residential and nonresidential uses should be horizontally and vertically mixed throughout the Main Street corridor. Residential uses should be prohibited on the ground floor of structures on primarily commercial streets.
<b>Land Use Intensity:</b>	Taller buildings should be promoted along the Main Street corridor. A minimum of 3 stories in the Downtown area and 2 stories in the Connector and West Gateway zones should be required. Higher allowable densities should also be encouraged through bonuses for implementing the design and policy recommendations of this Plan. The highest density development should be promoted in and surrounding the Downtown area.
<b>Building Placement:</b>	Buildings should be sited close to streets with their front facades facing the street from which the building derives its street address. Buildings should also form a consistent line of building facades along streets. A required build-to line is an important regulatory tool to achieve this. In addition, at least 70 percent of a lot's frontage should be a primary building facade in the Downtown and West Gateway areas, and in the Connector zone it should be at least 50 percent of a lot's frontage.
<b>Streetscape:</b>	Between the buildings lining a street (as described above) sidewalks, street trees and pedestrian-scaled lighting of no greater than 14 feet in height should create a comfortable walking environment. One tree should be provided for every 30 linear feet of street frontage of a lot. Pedestrian amenities such as benches shall also be provided.
<b>Building Entrances:</b>	Buildings should contain a main entrance facing the street for effective pedestrian access. Buildings abutting two streets could have one angled entrance facing the intersection of the two streets.
<b>Building Articulation:</b>	To support the pedestrian-oriented streetscape of the Main Street corridor; building materials, dimensions and architectural variety should promote an attractive streetscape and comfortable walking environment. Long expanses of blank walls without windows, doors, or other architectural elements facing streets should also be avoided.
<b>Ground-level Transparency:</b>	At least 60 percent of the length of the ground floor of all nonresidential building facades that are immediately adjacent to public sidewalks should consist of windows, glass doors or other transparent building surfaces providing for an unobstructed visual connection from the outside to the inside of the building. A minimum zone of transparency should be established between an elevation of two feet and eight feet above grade, and the window placement should be consistent with the entire building's facade.
<b>Civic Open Space:</b>	Civic open space areas identified in this Plan or Lansdale's Open Space Plan should be required as part of new development projects. Bicycle parking facilities should be included in the civic open space areas.
<b>Signage:</b>	Signage should be strongly controlled and required to be a Main Street format.
<b>Lot Access:</b>	Alleys should be maintained for access to uses within the Main Street corridor. Vehicular access for lots should be from a rear or side property line using direct street access, an alley or a shared access driveway. Property owners should be required to provide vehicular connections to adjacent lots for future access. These connections should be a minimum of 20 feet in width.
<b>Parking:</b>	No parking should be located between the curb of any street and the front of buildings. Parking areas visible from a public street should be screened. On-street parking should be maintained throughout the study area. Encourage shared parking and/or create a Main Street parking district. (See Transportation Concept of this Plan for additional information.) No parking garage should be located in the area between the curb of any street and the front of buildings. Parking garages should not have sloping floors visible from major streets. Liner uses abutting public sidewalks for garages should be strongly encouraged.
<b>Service Areas:</b>	All service areas such as loading docks, trash dumpsters and utility equipment should be prohibited along the front facades of buildings.

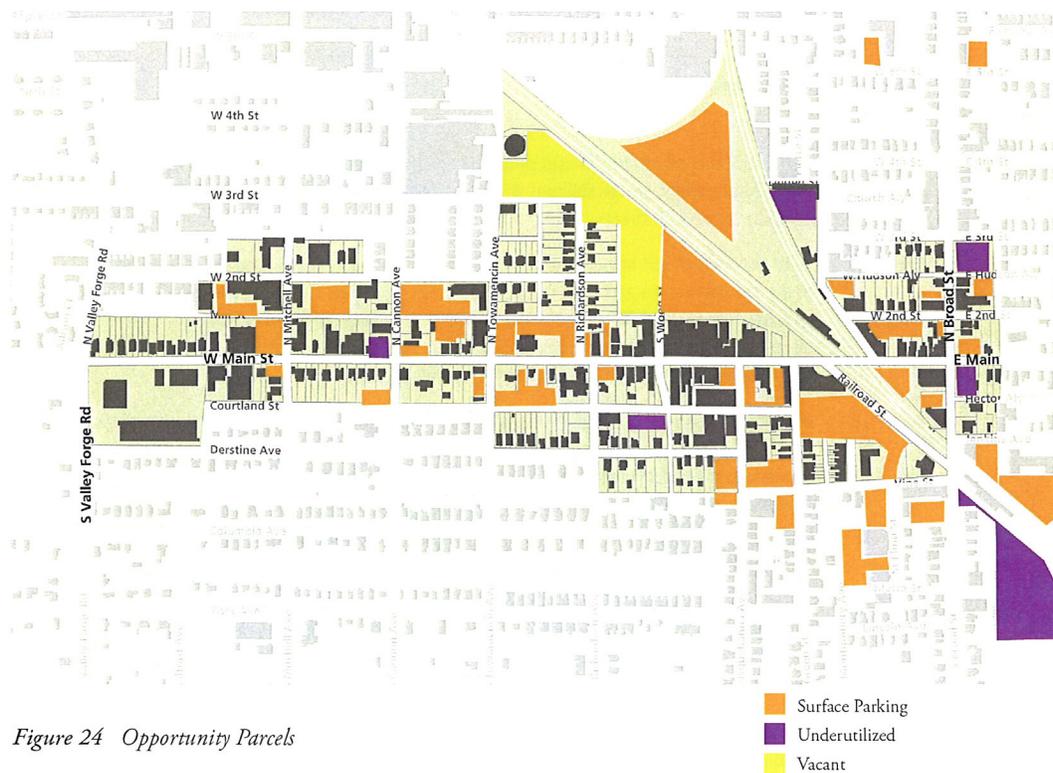


Figure 24 Opportunity Parcels

## Development Potential

The Borough is often described as a “built out” community with not much land available for new development, particularly in its downtown area. Figure 24 shows the locations for potential new development in and around the Lansdale business district. These sites range from less than an acre to over 7 acres in size. Most locations are currently surface parking lots, which could be developed further if parking is consolidated into common parking facilities sited throughout the downtown. Underutilized sites identified are properties that contain an existing structure but also have significant area of undeveloped land that could accommodate additional development. The vacant land adjacent to the Madison parking lot, formerly part of Lansdale’s electric company, is another important opportunity for future development. It is important to note that the purpose of this Plan is not to determine specific property for redevelopment; it is to establish development potential.

## New Investment

In order to realize the Borough’s downtown destination goals, the Plan identifies three types of investment conditions, current, infill, and strategic redevelopment. Figure 25 details the potential development that could occur in each of the Main Street corridor’s zones identified in Figure 26.



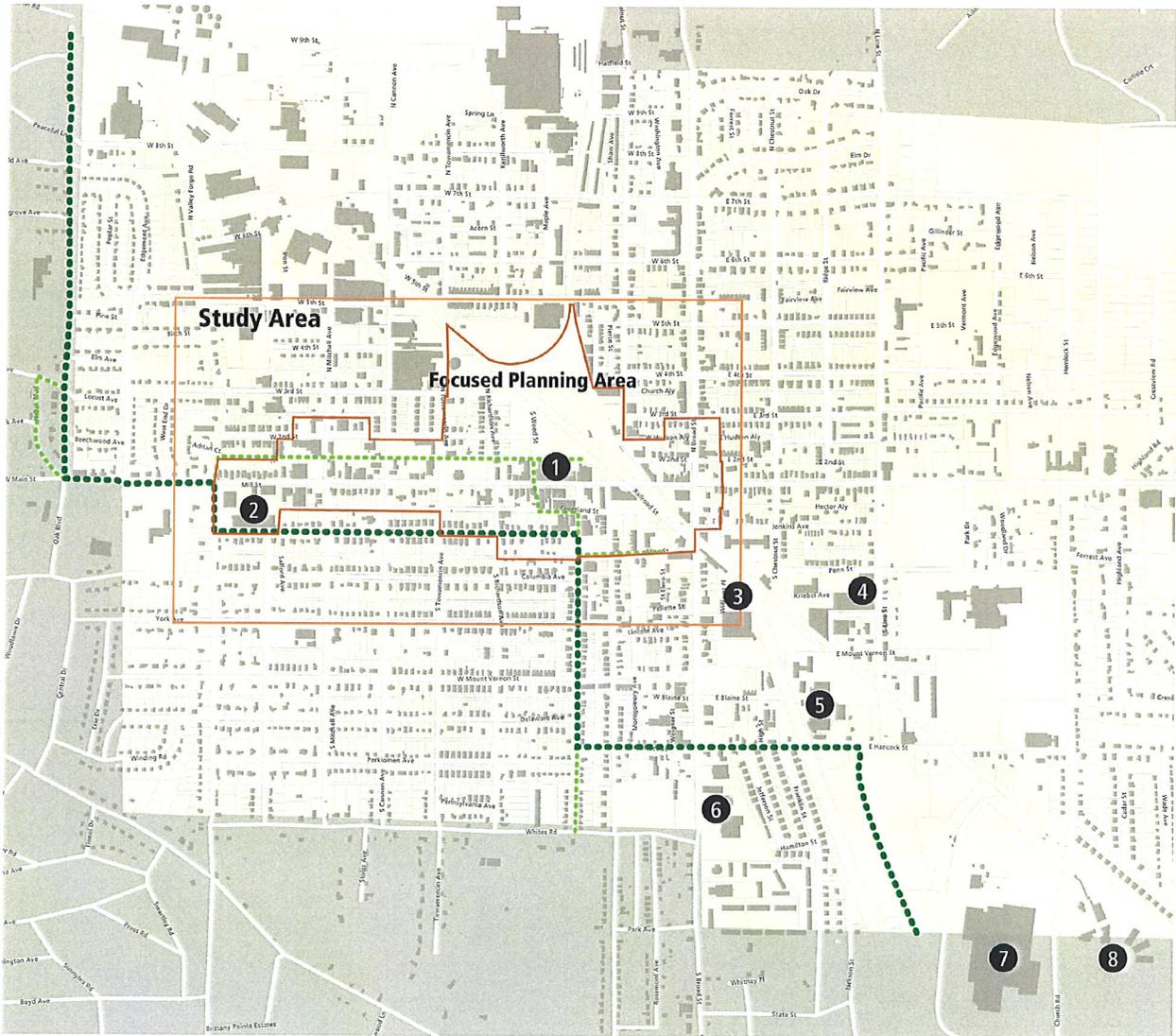


Figure 27 Current Development Activity

- |  |  |   |
|--|--|---|
| <p><b>1</b> Masonic Hall<br/>450 seating capacity theater<br/>220 seating capacity theater<br/>3,200 sq ft restaurant</p> <p><b>2</b> The Village at West Main<br/>29,680 sq ft retail<br/>8,800 sq ft office<br/>50-58 loft housing units</p> <p><b>3</b> ARC Wheeler Mixed-Use Project</p> | <p><b>4</b> Silk Factory<br/>115 loft housing units</p> <p><b>5</b> Andale Green<br/>288 age restricted housing units<br/>30,000 sq ft non-residential space</p> <p><b>6</b> The Pavilion<br/>132,382 sq ft retail</p> <p><b>7</b> Merck Training Facility</p> | <p><b>8</b> Station Square<br/>346 rental housing units<br/>7,500 sq ft restaurant<br/>38,300 sq ft professional office<br/>3,000 sq ft bank<br/>165 parking spaces</p> |
|--|--|---|

●●●●● Proposed Liberty Bell Trail Alignment  
- - - - - Point of Interest Spur Trail

## Current Development

Current development activity in the study area and surrounding neighborhoods (shown in Figure 27) indicates a healthy level of investment and confidence in the area's ability to grow. These projects either currently under construction or committed, encompass a mix of uses, including office, retail and housing. The Masonic Hall (1) and the Village at West Main (2) are both located in the Main Street corridor. An important observation is that little private investment is occurring or proposed in Lansdale's downtown core. For the downtown destination vision to be successful and sustained; niche retail, entertainment and restaurant uses will have to be concentrated in the core and not dispersed along Main and Broad Streets outside the core. Higher density housing should also be clustered in and surrounding the downtown core (restricted to upper floors on commercial streets) to create the lively street environment that will attract people to shop and live in the downtown. The Borough can direct these priority uses in two ways. First, by restricting many of these uses to the core through land use requirements and flexible parking policies. The second method is by providing development incentives, such as additional housing units in a proposed development, to make these uses more feasible and promote more people living and working in the downtown. The Borough has proactively invested in the downtown core with the performing arts center. Now private investment should be induced to maximize this public investment.

## Infill Development Opportunities

Infill investment will occur as the market perceives the downtown destination's attraction is sufficiently established by public and private investment. The potential for these types of developments generally exists on smaller parcels of less than an acre that are currently parking lots or other underutilized/vacant lots, such as the Rite Aid parking lot, the Univest Insurance property or the current Dunkin Donuts parcel. It should be a priority for the Borough to encourage infill development of corners that are parking lots along the Main Street corridor through regulation and incentives. In order to achieve this, a centralized parking strategy in the downtown will need to be implemented (See the Transportation Concept section of this Plan for more information regarding parking recommendations.). The Borough could also be a catalyst for redevelopment of these parking lots by developing one of its existing parking lots on Main Street to showcase its potential.

## Strategic Redevelopment Opportunities

Each of the identified zones (Downtown, Connector and West Gateway) on the Main Street corridor have strategic redevelopment opportunities. These opportunities are larger areas that will require the consolidation of multiple parcels and/or the redevelopment of existing structures. They are considered strategic because they will most likely be locations for anchor destination uses and landmark structures. In the downtown core, the Madison parking lot is identified as a strategic redevelopment site. The Univest Insurance property is another strategic opportunity in the Connector zone. In the West Gateway the shopping center at the corner of Mitchell Avenue and Main Street has the potential to be a substantial mixed use development, with retail along Main Street and housing adjacent to existing residential neighborhoods around 2nd and Mitchell.



Figure 28 Two-Story Building, Housing Above Retail

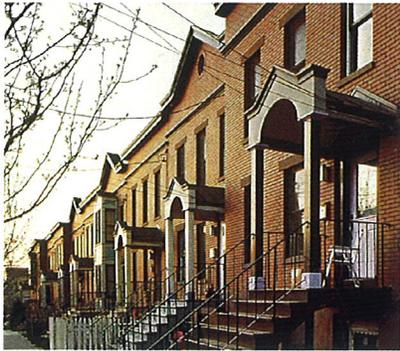


Figure 29 Two-Story Townhouse



Figure 30 Three-Story Building, Office with Lofts

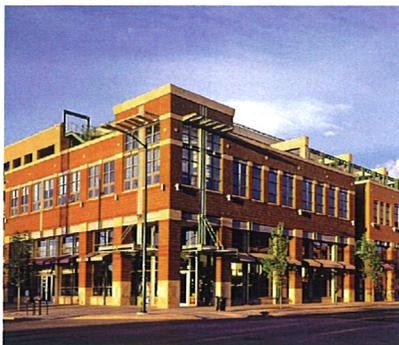


Figure 31 Parking Structure wrapped with Retail

## Recommended Building Models

There are several, typical building types that are recommended to provide realistic options for potential investors along the Main Street corridor that are also consistent with Lansdale's downtown vision.

### 1) Two-Story, First Floor Retail with Office/Residential Above:

Adaptive reuse of existing buildings and/or development of new structures with an average 4,500SF footprint provide mixed use on the street. Window lighting allows nighttime use. Parking is provided on street, to the side, or behind the building.

### 2) Two-Story Residential Townhomes:

Two-family units placed continuously along residential streets, with porches that address the sidewalk. Parking is provided on street, to the side or behind the building.

### 3) Three-Story, First Floor Retail with Townhomes Above:

The three story model is relatively new on the market, allowing the mix of uses to include desirable residential type with retail.

### 4) Three-Story, First Floor Office with Lofts Above:

Urban residential model mixed with office space. These could also be configured as live/work units.

### 5) Three-Story Parking Wrapped with Retail:

Retail stores wrap parking garage avoiding blank walls typically created by parking structures.

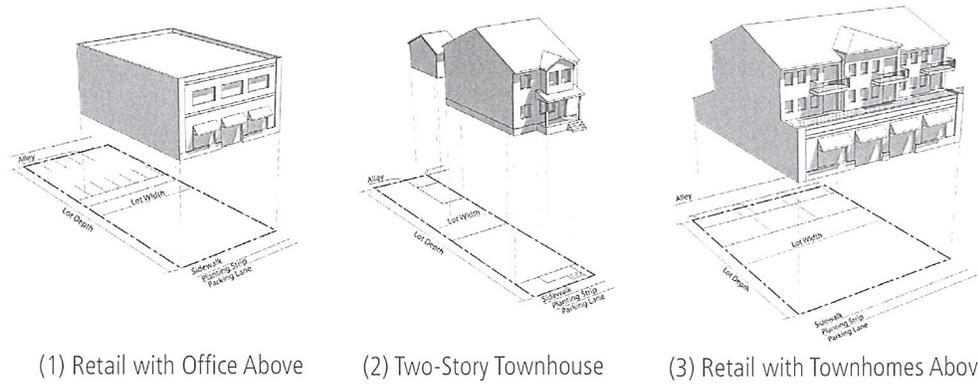
These five building types allow for a mix of use and densities in the study area. They encourage the active use of the street through appropriate setbacks to provide pedestrian scale sidewalks and lighting to allow safe night activity. Blank walls should be avoided through appropriate fenestration. Figure 32 shows examples of locations for the five building types within the study area.

The Downtown Center, the highest density area, should utilize at a minimum the three-story typologies, mixing office, retail and housing, as well as decked parking. The mix allows for an active street environment, encouraging 24/7 use.

The Connector links the main street to the adjacent neighborhoods, in addition to serving as a transition between the Downtown Center and West Gateway. The one and two-story typologies are best suited in this area.

The West Gateway's neighborhood retail character links the residential and retail needs of the adjacent neighborhoods. This area should require two-story structures to encourage mixed use development in this neighborhood center.

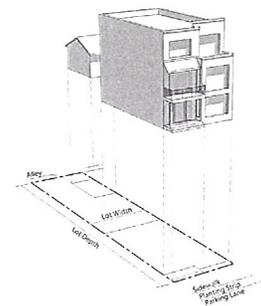
Figure 32 Examples of Preferred Building Types on Main Street Corridor



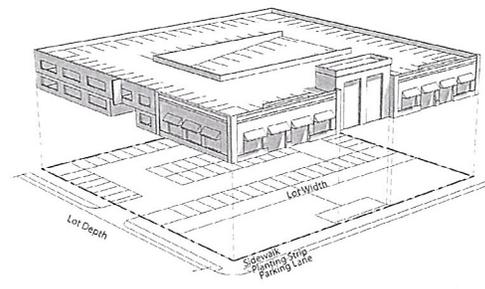
(1) Retail with Office Above

(2) Two-Story Townhouse

(3) Retail with Townhomes Above



(4) Office with Lofts Above



(5) Parking Wrapped with Retail

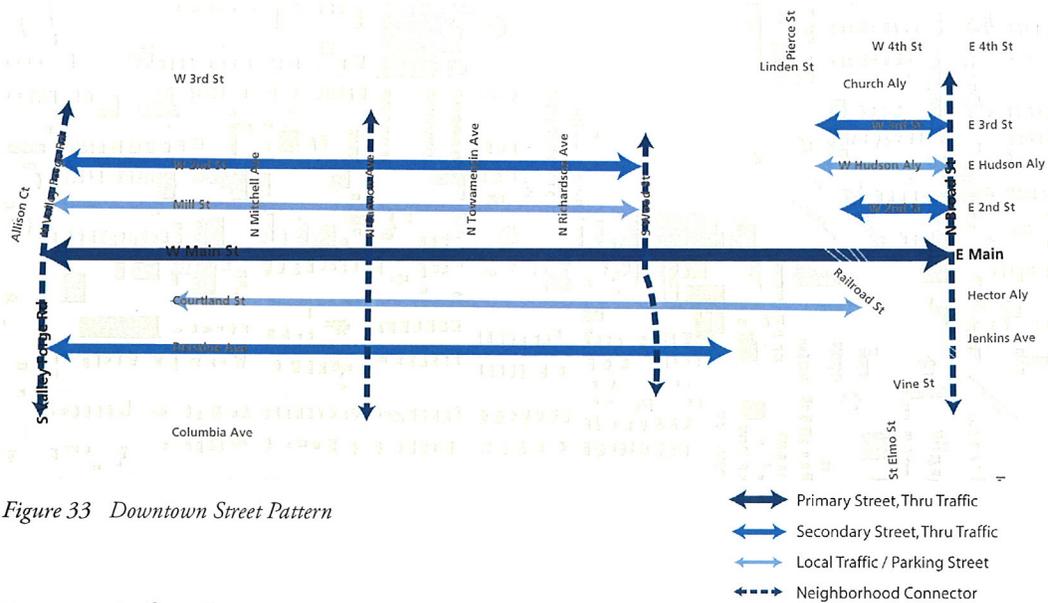


Figure 33 Downtown Street Pattern

**Transportation Concept**

Because the railroad was the transportation catalyst for the development of Lansdale, the Borough’s business district is centered around the train station and is very walkable. This traditional, railroad town circulation network has evolved over time to serve its Main Street commerce and more recently greater suburban commuter traffic.

An assessment of the street network revealed a circulation pattern of primary and secondary streets for vehicular thru traffic, and local traffic/parking streets serving Main Street business activity (See Figure 33). There are also several important streets running perpendicular to the Borough’s Main Street which direct cross traffic along Main Street and connect the Main Street corridor to the surrounding neighborhoods.

The Plan recommends building on this circulation pattern. It is very important to the success of Lansdale’s downtown for this street pattern to function efficiently and be clear to users through signage and proper engineering.

**Roadway Conditions**

A review of the road network in the study area found that it is generally in reasonably good condition and does not have significant safety or operational issues. Congestion does occur most heavily in the Borough’s primary commercial area, particularly at the intersection of Main Street and Broad Street. The congestion is created by heavy traffic volumes and exacerbated by the railroad pre-emption on the western leg of Main Street and the southern leg of Broad Street. Northbound vehicles on Broad Street turning left onto westbound Main Street can be caught in the pre-emption at both railroad crossings. Outside of that congested area, the majority of intersections along the major corridors in the study area that facilitate higher turning movement volumes are signalized and have exclusive left turn lanes on each of the approaches. In addition, the Borough has recently implemented a closed loop signal system

to optimize traffic operations at signalized intersections. At most intersections, constraints such as utilities, sidewalks and building structures make further improvements cost prohibitive or infeasible. Therefore, the Borough should continue to implement innovative measures to maximize the efficiency of the existing roadways.

### Railroad and Bus Conditions

Lansdale's Main Street Rail Station is served by the SEPTA R5 regional rail line. This rail line has the highest daily ridership of all the SEPTA regional rail line services. According to SEPTA usage data, the Lansdale station parking has nearly a 90 percent usage rate. Access to the Lansdale Station, however, can be difficult due to the level of traffic congestion on the major corridors that provide access to the parking areas. For vehicles exiting the train station onto Main Street, movements are restricted to right-out only. Therefore, vehicles destined to the east must either exit to the west and circle back through downtown roads or exit via Fifth Street.

Bus links to the R5 line are provided by the Route 96 and Route 132 on Main Street adjacent to the rail station. No service issues were found regarding these bus routes.

### Pedestrian and Bicycle Conditions

Pedestrians are accommodated through an extensive sidewalk network throughout Lansdale's business district. The sidewalks provide a link between residential areas, shopping, schools, parks, bus stops and rail service. The ability of Borough residents to walk to these key activity centers reduces the need for vehicular trips. Although sidewalks are provided on nearly every street, upgrades to significant walking corridors such as Main Street and Broad Street will improve walkability for residents and visitors attracted to the Borough's destinations. New sidewalk links are needed for the Lansdale Station to support use of the R5 regional passenger rail service.

The Montgomery County Planning Commission recently developed an on-road bicycle network for the entire county. The roads included in the network were classified according to primary routes, secondary routes and new road construction. Primary routes include key bicycling corridors that contribute to an interconnected network that links major destinations. The primary routes designated in Lansdale include Route 63 (Main Street) and Route 363 (Valley Forge Avenue). The remainder of the streets and roadways in the Borough included in the County network are classified as secondary routes.

Trail facilities provide an alternative to on-road bicycle facilities and sidewalks in busy activity centers for recreational bicyclists and pedestrians. The Borough is not currently served by any recreational trails. However, the proposed Liberty Bell Trail, a county trail that has been studied for several years, would generally follow the alignment of the old Liberty Bell Trolley line from Norristown to Quakertown and provide connections to Lansdale's Main Street. (See Figure 42 for the proposed alignment). Proper design of the trail and wayfinding signage will be important to the success of this trail and its linkage to Lansdale's business district.

## Capital Improvement Projects

### *PennDOT Twelve Year Program/DVRPC Transportation Improvement Program (TIP)*

The scheduling of many transportation improvements is conducted through the PennDOT Twelve Year Program. Every two years, PennDOT submits recommended projects for the next twelve fiscal years to the State Transportation Commission (STC) for their consideration. After a public review and comment process is completed, the STC adopts the Program with a list of projects that includes a description of each project, estimated cost of the project and the time frame for phases of the project to be completed in the next twelve years. The Borough has identified the intersection of Main Street and Broad Streets to study for safe pedestrian facilities when future funding becomes available.

### *Improvements Planned by Others*

Retiming the traffic signals and increasing the turning radii at the intersection of Route 63 and Route 363 are currently under construction or have been proposed in the Borough as part of land development projects.

### *Other Improvements*

In addition to the capital improvements contained in the TIP and planned by others, the following projects have recently been completed or are planned in the study area:

- Pre-emption of railroad signalization
- Closed loop traffic signal system
- Emergency services pre-emption of traffic signals
- Vine Street signalization

*Figure 34 Proposed P.M. Peak Hour Trip Generation from Downtown Destination Plan (1)*

	West Gateway	Connector	Core Downtown	Downtown East Gateway
Retail Quality Restaurant	119 / 58	17 / 8	69 / 34	117 / 58
Specialty Retail	40 / 52	42 / 53	28 / 35	40 / 52
Shopping Center	47 / 50	- / -	33 / 35	46 / 50
Office General	19 / 94	14 / 68	17 / 83	26 / 127
Medical/Dental	4 / 9	2 / 5	12 / 34	40 / 108
Residential Condominiums	35 / 17	22 / 11	49 / 24	16 / 8
<b>TOTAL</b>	<b>264 / 280</b>	<b>97 / 145</b>	<b>208 / 245</b>	<b>285 / 403</b>

<sup>1</sup> Entering/Exiting trips are shown. Trip generation was developed using trip generation equations published in Trip Generation, Seventh Edition, 2003, an Institute of Transportation Engineers (ITE) Informational Report, pertaining to Quality Restaurant (ITE Land Use Code #931), Specialty Retail (ITE Code #814), Shopping Center (ITE Code #820), General Office (ITE Code #710), Medical/Dental Office (ITE Code #720), and Residential Condominium/Townhouse (ITE Code #230). Table 2 shows the resulting trip generation for the Strategic Redevelopment scenario.

## Downtown Destination Plan Transportation Impacts & Recommendations

In order to determine the transportation effects of potential development from the Downtown Destination Plan the future trips for each subarea designated along the Main Street corridor: West Gateway, Connector, Downtown Core, and Downtown East Gateway were distributed to the immediately adjacent study intersections. It was assumed that trips traveling to/from a particular subarea would be passing through an adjacent subarea. Since the focus of this analysis was on determining where turn lanes and side street traffic controls are needed, it was assumed that the new traffic traveling through neighboring subareas will have a negligible effect on the free-flowing through movements on Main Street due to the Borough's extensive street grid system.

As part of the projected conditions review, a Borough proposed bypass route, which would divert traffic from Broad to Vine Street and Wood Street to avoid the rail crossings on Main Street and Broad Street, was assumed to be in place.

### *Roadway Improvements*

Based on the projected impact of the Downtown Destination Plan, the following conclusions and road improvements are recommended:

- Open Wood Street, north of Main Street, to two-way traffic. This is necessary if the parcel along the railroad tracks at the north end of Wood Street is developed. Wood Street is a logical primary access for this development to Main Street and the bypass.
- Install traffic signal at Main Street and Wood Street. A signal at this location would serve the bypass traffic and anyone entering the proposed development at the north end of Wood Street, as well as any traffic exiting this development if the north leg of Wood Street is reconfigured as a two-way road.
- Review traffic signal locations on Main Street between Valley Forge Road and Wood Street. The side street approaches to Main Street on Mitchell Avenue and Towamencin Avenue currently operate deficiently and will continue to do so with future development. Of these two intersections, Mitchell Avenue will likely deteriorate further more quickly than Towamencin Avenue due to its proximity to anticipated development. Towamencin Avenue is located 1,000 feet east of the signalized Valley Forge Road intersection and 500 feet west of the signalized Cannon Avenue intersection. If an additional signal is installed within this four-block area, it must be incorporated into the existing closed loop signal system to ensure that the new signal would not adversely affect the overall Main Street traffic flow.
- Those intersections that are currently signalized have ample capacity available to accommodate the Downtown Destination Plan. Signal timing and phasing should be reviewed periodically as new development comes online.

## **V. IMPLEMENTATION**

## V. Implementation

The Downtown Destination Plan contains a number of planning policies and recommendations. In order to effectively achieve the overall vision of the Plan, these actions need to be phased over time. The following action schedule is recommended:

### 0-3 Years

- Review and modify existing land development regulations based on the Plan's Land Use Concept and parking recommendations.
- Open Wood Street to two-way traffic.
- Open Performing Arts Center.
- Begin infill development demonstration project on Borough parking lot on Main Street.
- Complete Transit Plaza planning with SEPTA and begin improvements.
- Offer cafe space on existing Railroad Plaza.
- Install additional street lighting to fill the gaps on Main Street and light up downtown building facades.
- Complete Liberty Bell Trail through the Borough with wayfinding signage.
- Install new varieties of street trees on Main Street.
- Secure properties for proposed Vine/Wood By-pass and parking facilities along Derstine Avenue and near Broad and Second Streets. Develop additional parking at these locations.

### 3-5 Years

- Redevelop Madison parking lot as a mixed-use development with structured parking for the downtown.
- Complete the transit plaza tunnel, Main Street pedestrian areas, and linkages to the Madison lot redevelopment.
- Narrow and raise Madison Avenue as recommended.
- Finish the Vine/Wood by-pass.
- Install light at Main and Wood Streets.
- Complete new pedestrian crossings from Valley Forge Road to Broad Street.
- Install Susquehanna alley improvements.
- Finish local trail loop around Main Street corridor.
- Create demonstration stormwater management with redevelopment of Madison lot and the new transit plaza with water feature.
- Install new street trees on Main Street with landscaping at green nodes.

## **5+ Years**

- Review Downtown Plan success.
- Finish transit plaza improvements.
- Create structured parking near Vine/Susquehanna and Broad/2nd Streets to support additional development downtown.

## **Organization for Implementation**

The proposed implementation program has a substantial number of actions over the next five years. The proactive leadership of the Borough will be critical to its success. The Borough's Parking Authority should take responsibility for securing important properties and advancing the Plan's parking facilities recommendations.

Promoting the development opportunities, both strategic redevelopment and infill projects, and marketing the downtown attractions should be done by the Lansdale Foundation in close cooperation with the Borough and the Parking Authority. Key development catalyst projects will be the redevelopment of the Madison lot and a Borough parking lot on Main Street.

The Borough should also consider renewing its Main Street program and hire a Main Street manager to provide additional leadership and business promotion. The funding and timing of Pennsylvania's well established Main Street Program fits well with Lansdale's current revitalization needs and schedule.



## **VI. APPENDIX**

# Market Opportunities within Downtown Lansdale

A Report to the Borough of Lansdale

by S. Huffman Associates

August 2006

## Introduction and Background

Like many older communities within the Delaware Valley, Lansdale has experienced some decline in its population and employment over the past several decades. New employment centers, shopping centers, and subdivisions have been built in surrounding townships, and jobs and people have followed. Unlike many of the region's communities, however, Lansdale has systematically addressed these issues with a series of redevelopment strategies.

The first of these, the Downtown Lansdale Redevelopment Strategy, was prepared in 1984. It recommended focusing investment and beautification on the Borough's downtown core, and resulted in the relocation of City Hall and the renovation of the Lansdale Train Station. The second redevelopment strategy was prepared in 2001 as part of Montgomery County's Community Revitalization Program, and focused on three areas: the 7.5 acre Madison Avenue parking lot, the 200 acre industrial park on Cannon Avenue, and a site at the intersection of Valley Forge Road and Main Street. Most recently, the Borough has completed a Comprehensive Plan for the Borough, and has received a grant from the Delaware Valley Regional Planning Commission's (DVRPC) Transportation and Community Development Initiative (TCDI).

The TCDI program supports efforts in older communities that will result in their redevelopment, reduce urban sprawl, and encourage use of the region's existing transportation system. Lansdale, with its regional rail access and its recently renovated train station, has the opportunity to leverage its accessibility and its upgraded streetscape to bring about more redevelopment throughout its business district. It has requested Wallace Roberts & Todd (WRT) to update its 2001 Revitalization Plan for that purpose under the TCDI grant. WRT in turn asked S. Huffman Associates (SHA) to update its assessment of the market for retail and commercial uses in the North Penn market area, and to define Lansdale's position in the regional economy. This report is a summary of SHA's findings.

## Methodology

The previous study recognized that Lansdale and its economic base are part of the regional economy, and to some extent dependent upon it. It also established the North Penn Area as the retail market area for the Borough, consisting of the boroughs of Lansdale, Hatfield, and North Wales, and the townships of Hatfield, Towamencin, Montgomery, and Upper Gwynedd. These definitions of market area were based in part

on the traditional, historic area that the Borough served in the past, and in part on the geographic area that it currently serves.

Data for the analysis of Lansdale’s economic base was gathered from a variety of sources, including the Delaware Valley Regional Planning Commission and the Bureau of Economic Analysis. Demographic estimates and projections were gathered from DVRPC and from Claritas, Inc. Realtors and developers active in Lansdale were interviewed for their input into the current status of the Borough’s economy.

Finally, the retail market analysis that was conducted in 2001 was updated to determine how many of the dollars available to resident households for retail expenditures are being spent inside the primary market area, and how many are spent outside. Competing retail locations were identified through the Montgomery County Planning Commission’s 2005 Shopping Center Inventory, and through a field trip to assess the character, condition, and general attractiveness of the shopping areas. Finally, realtors active in the Borough were interviewed about the state of its real estate market, including the types of tenants they are able to draw into the town, current rent levels, and the length of time properties are likely to stay on the market. This report summarizes the results of this updated market study, describes economic development in the Borough as it is today, and makes recommendations on the types of business and industry that can potentially be attracted there.

#### Demographics of Lansdale and the North Penn Region

The table below summarizes population projections from DVRPC for the five county Philadelphia region for the years 2010 and 2020. It shows that Montgomery County is one of the three drivers of growth within the region, with an overall population increase of almost 12% projected for the 20 year period. Bucks County, several miles east of Lansdale, is another high growth county, with a projected population increase of 18.7%. Overall, the five county region is projected to grow by 7.5% by 2020.

#### Forecasted Population by County

	2000	2010	2020	2000 to 2020	
				Absolute Change	% Change
Bucks	597,635	652,800	709,150	111,515	18.7%
Chester	433,501	483,500	528,000	94,499	21.8%
Delaware	551,974	550,970	546,972	-5,002	-0.9%
Montgomery	750,097	797,990	838,700	88,603	11.8%
Philadelphia	1,517,550	1,484,990	1,515,010	-2,540	-0.2%
5 County-PA Total	3,850,757	3,970,500	4,137,832	287,075	7.5%

Source: Delaware Valley Regional Planning Commission, March 2005

The following table summarizes DVRPC’s forecasts for the North Penn region by municipality through 2020. The region is expected to grow at the same rate that the County will grow over the 20 year period. Within the region, Montgomery Township will

experience the greatest growth (over 21%), followed by Upper Gwynedd and Hatfield Townships. Lansdale is forecast to add 350 residents, for a 2.2% growth rate. However, because there are currently some 450 dwelling units being planned or under development, it is the opinion of this consultant that Lansdale will add 1,000 or more new residents by 2020.

### Forecast Population by North Penn Municipality

	<u>2000</u>	<u>2010</u>	<u>2020</u>	2000 to 2020	
				Absolute <u>Change</u>	% <u>Change</u>
Hatfield Borough	2,605	2,560	2,500	-105	-4.0%
Hatfield Township	16,712	17,670	18,970	2,258	13.5%
<b>Lansdale</b>	<b>16,071</b>	<b>16,310</b>	<b>16,420</b>	<b>349</b>	<b>2.2%</b>
Montgomery	22,025	24,870	26,740	4,715	21.4%
North Wales	3,342	3,250	3,210	-132	-3.9%
Towamencin	17,597	18,610	19,750	2,153	12.2%
Upper Gwynedd	14,243	16,050	16,280	2,037	14.3%
Total	94,595	101,330	105,890	11,295	11.9%

Source: Delaware Valley Regional Planning Commission, March 2005

Appendix A at the end of this report shows estimates for Lansdale and the North Penn region for 2006 and projections for 2011 from Claritas, Inc. Because Claritas has not accounted for the growth that is currently underway in the Borough, its overall numbers do not reflect the most likely growth scenario. The table does, however, summarize the characteristics of the Lansdale and North Penn region.

Lansdale's estimated 2006 racial composition reflects that of the North Penn region, with about 10% of the population of Asian heritage, 4% Black, and between 2% and 4% of Hispanic origin. The Borough reflects the region's median age of about 39 years, but has a lower percent of residents under 20 years old and a higher percent over 65. Educational attainment is somewhat lower, with a larger percent of Borough residents having high school degrees and a lower percent having a Bachelor degree or higher. The homeownership rate is also somewhat lower in Lansdale than in the surrounding townships. Finally, Lansdale's estimated median household income for 2006 of \$51,937 is more than \$20,000 lower than the median income in the North Penn region.

### Employment

The following table shows DVRPC forecasts for the years 2010 and 2020. Montgomery County had the largest employment of any of the four suburban counties in 2000, and is expected to retain that lead in 2010 and 2020. Because the three other counties began with a smaller job base, however, the growth rates of both Bucks and Chester counties are expected to be larger. Montgomery County, however is expected to add more jobs than any of its neighbors over the 20 year period.

## Forecasted Employment by County

	<u>2000</u>	<u>2010</u>	<u>2020</u>	2000 to 2020	
				Absolute <u>Change</u>	% <u>Change</u>
Bucks	267,124	292,453	320,280	53,156	19.9%
Chester	238,641	270,523	305,086	66,445	27.8%
Delaware	238,164	251,901	265,787	27,623	11.6%
Montgomery	492,677	531,225	563,029	70,352	14.3%
Philadelphia	741,397	726,205	748,136	6,739	0.9%
5 County-PA Total	1,978,003	2,072,307	2,202,318	224,315	11.3%

Source: Delaware Valley Regional Planning Commission, March 2005

The following table summarizes data from the Bureau of Economic Analysis for Montgomery County in 2004. It shows a County in which suburbanization is causing the agricultural and mining sectors to contract. It also shows a loss of jobs in information and manufacturing. Sectors that grew by more than 10% between 2001 and 2004 were arts, entertainment, and recreation, and other services, except public administration. Finance, insurance, and real estate, professional and technical services, and education and health care accounted for almost 40% of the County's employment in 2004.

## Montgomery County Employment by Industry: Number of Jobs

	<u>2001</u>	<u>2004</u>	<u>% Change</u> 2001-2004	<u>% of 2004</u>
				<u>Total Emp.</u>
Total Employment	593,926	596,083	0.4%	
Farm, Forestry, Fishing, Mining	1,458	1,311	-10.1%	0.2%
Construction	33,810	33,208	-1.8%	5.6%
Manufacturing	70,668	59,527	-15.8%	10.0%
Wholesale trade	29,221	29,334	0.4%	4.9%
Retail trade	64,984	65,696	1.1%	11.0%
Utilities, Transportation & Warehousing	13,214	13,927	5.4%	2.3%
Information	19,743	14,991	-24.1%	2.5%
Finance, insurance, real estate and leasing	66,037	67,539	2.3%	11.3%
Professional, technical services & management of companies	70,010	75,042	7.2%	12.6%
Administrative and waste services	41,253	41,953	1.7%	7.0%
Educational, health care and social assistance services	83,913	86,303	2.8%	14.5%
Arts, entertainment and recreation	9,410	10,565	12.3%	1.8%
Accommodation and food services	26,559	28,822	8.5%	4.8%
Other services, except public administration	25,589	28,473	11.3%	4.8%
Government and government enterprises	38,057	39,392	3.5%	6.6%

Source: Bureau of Economic Analysis

The table below summarizes DVRPC employment projections for 2010 and 2020 for the North Penn region. Lansdale, Hatfield Borough, and North Wales are expected to experience some employment growth for the period, but the major gains are forecast for Hatfield, Montgomery Township, Towamencin, and Upper Gwynedd Townships. Merck, located just outside of Lansdale on more than 500 acres in Upper Gwynedd Township, has for many years been the largest employer in Montgomery County. Its manufacturing and research divisions have sites in Upper Gwynedd, and it serves as the headquarters for

its global vaccine business and its human health business. About Merck 7,000 employees work in Upper Gwynedd Township, making Merck the dominant economic force in the North Penn area. It is, in fact, a major driver of the region's biotechnology industry.

Two other large employers are also located in the North Penn Region. Hatfield Quality Meats is a 110 year old company with approximately 1,500 employees located in Hatfield Township, and Visteon Automotive Systems employs about 500 in the manufacturing automotive electronics in Upper Gwynedd Township.

### Forecasted Employment by North Penn Municipality

	2000 to 2020					
	2000	2010	2020	Absolute Change	% Change	
Hatfield Borough	1,950	1,994	1,999	49	2.5%	
Hatfield Township	13,473	15,506	17,494	4,021	29.8%	
<b>Lansdale</b>	<b>10,604</b>	<b>10,950</b>	<b>11,085</b>	<b>481</b>	<b>4.5%</b>	
Montgomery	17,127	19,461	21,677	4,550	26.6%	
North Wales	1,780	1,812	1,808	28	1.6%	
Towamencin	5,466	6,664	7,964	2,498	45.7%	
Upper Gwynedd	14,119	15,495	16,670	2,551	18.1%	
Total	66,519	73,892	80,717	14,178	21.3%	

Source: Delaware Valley Regional Planning Commission, March 2005

Finally, the table below summarizes Claritas' estimates of North Penn residents' employment by industry. North Penn has a relatively high percentage of residents employed in manufacturing. In addition, a large number of residents are employed in education, health care, and social assistance.

### North Penn Area Employment of Residents by Industry

	2006 Estimates Surrounding					
	Lansdale		Municipalities		North Penn	
	Number	Percent	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing, Mining	2	0.0%	100	0.2%	102	0.2%
Construction	585	6.8%	2,061	4.7%	2,646	5.0%
Manufacturing	2,146	24.8%	9,636	22.0%	11,782	22.5%
Wholesale trade	332	3.8%	1,812	4.1%	2,144	4.1%
Retail trade	1,231	14.2%	5,393	12.3%	6,624	12.6%
Utilities, Transportation & Warehousing	308	3.6%	1,285	2.9%	1,593	3.0%
Information	242	2.8%	1,350	3.1%	1,592	3.0%
Finance, Insurance, Real estate and leasing	645	7.4%	4,311	9.8%	4,956	9.4%
Professional, Tech. services & Manag.of companies	530	6.1%	3,938	9.0%	4,468	8.5%
Administrative and Waste services	296	3.4%	1,032	2.4%	1,328	2.5%
Educational, Health care and Social assistance	1,401	16.2%	7,760	17.7%	9,161	17.5%
Arts, Entertainment and Recreation	76	0.9%	435	1.0%	511	1.0%
Accommodation and Food services	424	4.9%	1,872	4.3%	2,296	4.4%
Other services, except Public administration	316	3.6%	1,955	4.5%	2,271	4.3%
Government and government enterprises	128	1.5%	879	2.0%	1,007	1.9%
Total	8,662		43,819		52,481	

Source: 2006 Claritas, Inc.

## Lansdale's Assets

Lansdale is in the North Penn School District, as are the remaining townships in the North Penn Area. All North Penn municipalities pay a school millage of 18.315, and a County millage of 2.89. Lansdale's municipal millage is .993, which compares favorably to those of surrounding communities, which range from .699 (Hatfield Borough), to 2.66 (North Wales Township). Another major source of revenue for Lansdale is half of the 1% earned income tax, a type of tax that an increasing number of suburban municipalities are adopting. Lansdale has been able to maintain a low municipal millage over the past years, while many of its neighbors have been forced to increase theirs.

Lansdale is one of 34 municipalities in the State that is entitled to buy and resell electricity. It supplies its residents and businesses at rates that are the lowest within the Southeast Pennsylvania region, by negotiating, in cooperation with other municipalities, a bulk contract with Pennsylvania Power and Light (PP&L). Lansdale also purchases power from the New York Power Authority, which supplies very low cost hydroelectric power to the Borough. This low cost, reliable power source is one of Lansdale's unique assets.

The Borough also has good regional access. The Lansdale Interchange of the Northeast Extension of the Pennsylvania Turnpike is a 10-minute drive, and Routes 202 and 309 are also within a few miles of the Borough. Lansdale is served by a recently renovated historic train station, has excellent train service to Doylestown and the western suburbs, and is one hour from Center City Philadelphia by regional rail. This road and train service gives the Borough excellent access to a regional labor market and a potential source of customers for a revitalized downtown.

In summary, Lansdale is a borough with a reasonable tax rate, a reliable and inexpensive source of energy, good regional transportation, and a business-friendly environment. It is a stable and relatively safe community in a County that is growing in both population and employment. It is also in a relatively high growth part of the Philadelphia region. It is in fact next door to the largest employer in Montgomery County, and a leader in an industry that has been targeted by the Commonwealth of Pennsylvania as crucial to the State's future economic health. Lansdale's challenge will be to package its assets so that it too reaps the benefits of the Montgomery County economy.

## The Office Market

Interviews were held with real estate developers and realtors as part of this study to address office and retail commercial space. Topics covered in these interviews included rent levels in Lansdale and the remainder of the North Penn area, types of tenants that are in the market in both areas, vacancy rates, and the length of time a property is likely to stay on the market.

Several major real estate brokerages prepare annual summaries of the office market in the Philadelphia region on an annual basis. At the time of our original market study four

years ago, none of these brokerages included the North Penn Region. Recently, however, Grubb & Ellis has expanded the Montgomeryville market area to include Lansdale, and has been tracking office rents in the region. The following table summarizes their most recent market report for the first quarter of 2006.

The suburban Philadelphia office market has a total of 56,771,205 square feet, and the Lansdale/Montgomeryville market area accounts for a relatively small 2,624,528 square feet of the total. Most of this office space is in office parks outside of the Borough of Lansdale. Vacancy rates in the suburban market run from a low of 8.56% in Jenkintown to 33.4% on the Main Line. Lansdale/Montgomeryville has a relatively low vacancy rate of 13.86%. It also has the lowest average asking lease rate for Class A office space. There are no major office buildings currently under construction in the Montgomeryville/Lansdale market area.

### Philadelphia Region Office Vacancy Rates and Asking Lease Rates

<u>Market</u>	<u>Rentable Area (SF)</u>	<u>Vacancy Rate</u>	<u>YTD Net Absorption (SF)</u>	<u>Under Construction (SF)</u>	<u>Class A Average Asking Lease Rate</u>
Downtown Philadelphia	40,430,502	11.52%	320,567	1,238,000	\$22.21
Suburban Philadelphia	56,771,205	17.44%	174,875	723,499	\$24.53
Bala Cynwyd	2,810,021	13.05%	-5,422	0	\$28.43
Conshohocken	3,369,336	16.08%	153,962	0	\$29.74
Delaware County	4,904,622	20.93%	-19,933	0	\$21.30
Exton/West Chester	3,411,664	19.77%	-1,257	0	\$22.25
Fort Washington	3,523,767	24.96%	22,019	75,000	\$22.15
Horsham/Willow Grove	4,683,880	11.17%	8,909	0	\$21.31
Jenkintown	1,323,676	8.56%	-20,351	0	\$24.29
King of Prussia/Valley Forge	16,193,322	14.55%	82,756	205,122	\$25.10
<b>Lansdale/Montgomeryville</b>	<b>2,624,528</b>	<b>13.86%</b>	<b>88,887</b>	<b>0</b>	<b>\$19.46</b>
Lower Bucks County	4,433,353	16.67%	-65,714	322,500	\$22.68
Main Line	2,864,674	33.41%	-21,832	0	\$27.96
Plymouth Meeting/Blue Bell	5,293,303	19.92%	-7,549	120,877	\$25.62
Upper Main Line	1,335,059	23.10%	-39,600	0	\$28.66

Source: 2006 CB Richard Ellis, Inc.

A brief survey of office rents in and around Lansdale was undertaken as part of this study. Nearby office parks include the Towamencin Business Center and the Gwynedd Corporate Center. Towamencin currently has one 77,500 square foot building on the market. It is about 70% leased at \$27.75 per square foot, and the average office size is about 5,000 square feet. The developer will not break ground on additional (approved) buildings until the one currently on the market it leased. The Gwynedd Corporate Center is an older office park on Welsh Road that is between 92% and 95% leased at \$22.50 per square foot plus electric. The leasing agent noted that most landlords do not like to lease less than 5,000 square feet.

The Heritage Executive Campus is an attractive, well landscaped 25,000 square foot complex of smaller two story buildings in a campus setting in Colmar. The campus was built three years ago, and was fully leased eight months after the current owner purchased it. The spokesman felt that there is a lack of attractive, high end office space available for smaller space users at a good market price. Most of the tenants are professionals who were looking for space ranging between 800 and 2,500 sq. ft. First floor leases go for \$19.50 plus electric, second floor for \$17.50.

At the south end of Lansdale, adjacent to the Pennbrook SEPTA Station, the Station Square Shops are currently under construction. There will be about 10,000 square feet of office space with rents of \$14 per square foot plus Common Area Maintenance (CAM) of \$4.25. There is also about 8,000 square feet of office currently under construction at the Village of West Main Street.

There are several older office buildings in downtown Lansdale. The leasing agent for 100 W. Main Street said the almost 60,000 sq. ft. building has about thirty tenants, mainly small users such as a dental group, hairdresser, financial consultants and a mortgage company. The building has typically been 95% to 100% occupied, and the lease rate is \$16.50 plus electricity. Other rental rates for downtown Lansdale office space ranged from \$12 to \$18 per square foot.

The major finding from the interview process was that there is a lack of product for the small (500 to 5,000 square feet) office user. Potential tenants in this group are professional services, health related users, finance, insurance, and real estate companies. These sectors have already shown strength in Montgomery County, and the projects that cater to them have done well. Finally, in a region where the population is increasing, it is likely that these sectors will continue to grow.

#### Retail Potential

**Market Area.** We have retained the definition of the retail market area that was established in the previous market study. That market area was the North Penn region, consisting of the Boroughs of Lansdale, Hatfield, and North Wales, and the townships of Hatfield, Towamencin, Montgomery, and Upper Gwynedd. It includes the heavy concentrations of retail commercial space on Route 309 in Montgomery Township.

Retail Potential. The amount of money that is available for retail purchases depends upon the number of households in the market area and their incomes, and is usually somewhere between 35% and 40% of total aggregate household income. Claritas, Inc., a company that specializes in demographic analysis, estimates the "retail potential" of households, using the Bureau of Labor Statistics' (BLS) Consumer Expenditure Survey and their own demographic estimates. This data on consumer spending patterns was ordered from Claritas.

Data on retail sales within Lansdale and the North Penn region was also purchased from Claritas. Using the 1997 Census of Retail Trade, recent wage and employment from BLS,

and local sales tax data estimates the number of retail establishments, by type, and the annual sales in those establishments, within a market area. By subtracting the estimated expenditures for food, drugs, and household supplies within the two radii from the retail potential of the residents of those radii, the retail outflow from the site can be determined.

Appendix B at the end of this report summarizes data from Claritas on retail sales and retail potential for Lansdale and for the North Penn region. Categories shown in bold are those for which there is more demand in the North Penn region than supply, and indicate a retailing opportunity. Negative numbers in italics but not in bold indicate categories with more demand than supply in Lansdale, but more supply than demand in the entire North Penn region.

The overall annual loss of retail dollars from Lansdale is about \$73,409,000. At the same time, the North Penn region, with its 4,363,747 square feet of retail space, has a net inflow of retail dollars of just under \$360,000,000. Nonetheless, there are retail opportunities for Lansdale in several categories. Those opportunities that are appropriate for downtown Lansdale as shown on this table are specialty food stores, luggage and leather goods, florists, office supplies, gift, novelty, and souvenir shops, other miscellaneous shops, which can include pet, art and art supplies, tobacco, and other small users of retail space. The largest major opportunity that is evident for both Lansdale and the entire North Penn region is food service and drinking, with a retail outflow from the region of over \$20,000,000.

Retailing in the North Penn Region. In 2005, Montgomery County conducted a Shopping Center Inventory, which categorized shopping centers as neighborhood, community, regional, super regional, and big box and stand alone department store. After reviewing and summarizing relevant data from the Planning Commission on shopping center locations, S. Huffman Associates supplemented the findings in a field trip. The purpose of the field trip was to update information on current tenants and to assess the general attractiveness and appeal of each center as a place to shop. Appendix C summarizing this updated inventory can be found at the end of this report.

Hatfield Township has two community shopping centers with a total of 426,000 square feet of retail space. Ralph's Corner at Welsh and Forty Foot Roads has a Clemens Market, Kohl's, Ross, and CVS. Snyder Square at Cowpath and Orvilla Roads has a CVS and is currently being renovated. Towamencin and Upper Gwynedd Townships have six neighborhood centers between them with a total of 407,000 square feet of retail space. Stores include supermarkets, drug stores, hardware stores, and banks.

The major concentration of retail in the North Penn area, however, is clearly in Montgomery Township. Intersected by Routes 202 and 309, Montgomery has a total of 3,187,000 square feet of retail space. The largest of its shopping centers is the 1,123,000 square foot super-regional Montgomery Mall, which has a JC Penney, Macy's, and Sears, but recently lost Strawbridge's. The second largest shopping area in Montgomery Township is Montgomery Square, with 509,000 square feet of space and a Target, Giant Food, CompUSA, Modells, and Barnes & Noble. In addition to these two large centers, there are four community

shopping centers in Montgomery Township with over one million square feet, and five smaller neighborhood centers with an additional 524,000 square feet. Montgomery Township accounts for approximately 73% of the retail space within the North Penn market area.

At the time of the previous report, Lansdale had two small shopping centers with a total of 202,873 square feet, as well as small free standing retail establishments on Main and Broad Streets. As of this writing, it still has the 132,000 square foot Hillcrest Center, which has a Clemens Market and an Ames. However, the former Gary's Plaza at South Broad and White's Road, now the Shops at Lansdale, is undergoing renovation and doubling its size to about 140,000, and has attracted such tenants as Saladworks and The Bike Shop. In addition, the Village at West Main and the Station Square Shops are currently under construction, adding about 70,000 new square feet of retail to the Borough. Rental rates for this new retail space generally runs between \$20 and \$30 per square foot.

#### New Developments Proposed and Underway in Lansdale

At the time of the previous market study in 2001, there was little or no development activity in Lansdale. Five years later, there are several projects underway and more proposed. Probably the single most important new proposed development is the Lansdale Performing Arts Center on West Main Street. Current plans are for a 670 seat facility that will serve as a regional draw. If it is typical of this type of facility, it will have day and nighttime programs for all ages, and will serve as a catalyst for the redevelopment of the downtown.

In addition to the Arts Center, there are three commercial projects under construction in Lansdale. As noted above, they are

- The Shops at Lansdale, South Broad and White's Road, 140,000 square feet of retail;
- Station Square Shops, Church Rd. at the Pennbrook Station, 30,000 sq. ft. of retail and 10,000 square feet of office;
- Village at West Main Street, 800 W. Main St, 8,000 sq. ft. of office and 26,000 sq. ft. of retail.

The residential market is active as well: about 350 rental units have recently been developed at Station Square at the south end of the Borough. Even more interesting are the residential developments that are proposed or underway, including:

- The Village at West Main Street: between 50 and 58 market rate loft sales housing units that will sell at prices from \$250,000 to \$400,000.
- Andale Green, 288 age restricted units on Hancock Street
- The Silk Factory, 115 market rate loft units on South Broad Street

Finally, two additional projects are in the planning stages, but have not announced final programs or pricing. The first is proposed on the site of the Madison Avenue Parking lot,

and the second is a mixed use project that is under discussion at South Broad and Railroad Streets.

These residential developments have significant ramifications for the redevelopment of Lansdale. The approximately 450 dwelling units that have been announced will bring new residents into the Borough, each with money to spend and needs to be met. If the household sizes in the new developments reflect the current estimated household size in the Borough of 2.39 residents, there would be an additional 1,075 new people living there. The two additional projects that have not yet been formally announced should bring in even more residents.

If the incomes of the 450 new households that will live in the three announced developments were the same as the median household income for the North Penn Region, they would bring additional \$32,539,950 in the Borough. If they spent approximately 35% of their incomes on retail goods and services, they would spend \$11,388,000 on those goods and services. The challenge for the Borough is to maximize the capture of retail dollars.

#### Summary and Conclusions

Lansdale has seen substantial changes over the past five years, and these changes are now becoming visible. The completion of a strategy for redevelopment, the plans for the Regional Performing Arts Center, the completion of a new comprehensive plan, and the continuing involvement of the community are attracting the interest of developers who are investing in older structures and building new.

The Borough is at the center of the North Penn region, which is forecasted to add 11,295 new residents between the years 2000 and 2020, and 14,178 new jobs. Although Lansdale itself is only forecast to grow by 349 people, there are currently 450 new dwelling units that have been announced or have even moved forward with construction. Lansdale could add as many as 1,075 new residents within the next few years, and many more than that depending upon the redevelopment of the Madison Avenue lot and the development at Railroad and South Broad Streets.

The sectors that are currently leading job growth in the County are finance, insurance, and real estate, professional and technical services, and education and health care. Arts, entertainment, recreation, and related services have also experienced some job growth in recent years. Because of the expected growth in the North Penn region between 2000 and 2020, these sectors, which offer a variety of professional and/or business services to families and businesses, are good candidates for expansion in the North Penn region as well.

Lansdale needs to capture this growth within its borders. Its assets include:

- Excellent train service, and therefore regional access for workers;
- Inexpensive electricity;
- A business friendly climate;
- Good regional highway access;

- A major international corporation next door;
- A sense of place.

Lansdale is an excellent location for small office users who require anywhere from 500 to 5,000 square feet of space, although the bulk of that market is likely to require less than 2,500 square feet. The typical users would be small businesses that provide services to other businesses, including everything from accounting and legal services to graphic design and copier repair, and businesses that offer services to North Penn residents. These services could range from insurance to financial services to real estate and medical services.

By targeting this market niche, Lansdale will address the lack of attractive, well maintained office product for the small user in the North Penn region. Achievable rents are likely to be approximately \$20 per square foot. Based upon the only comparable development for the small user, Heritage Village in Colmar, about 15,000 square feet of this type of space can be leased per year.

**Retail Commercial:** The proposed regional arts center should be used as a catalyst for increased retail activity. There is a net outflow of retail dollars from the borough of about \$73,409,000. This net outflow is concentrated in specialty food stores, luggage and leather goods, florists, office supplies, gift, novelty, and souvenir shops, and other miscellaneous shops, which can include pet, art and art supplies, tobacco, and other small users of retail space. The arts center should serve as catalyst for this type of retailing, which should include materials and supplies for the creative and performing arts as well.

The largest major opportunity that is evident for both Lansdale and the entire North Penn region is food service and drinking. The Borough loses an estimated \$15,621,000 in this category per year, and the North Penn region loses over \$20,000,000 per year. This is an obvious market niche for Lansdale, and one that will also support and be supported by the regional arts center.