

BOARD OF COMMISSIONERS

TODD M. SINAI, PRESIDENT

June 18, 2025 - 7:30 PM

AGENDA

1. Call to Order

2. Roll Call

3. Presentation: Acknowledging the Human Relations Commission for their contributions to the community.

4. Approval of Minutes

- Minutes of a special meeting of the Board of Commissioners held on May 14, 2025 and a stated meeting of the Board of Commissioners held on May 21, 2025, as distributed.

5. Announcements

- The Board will meet on Wednesday, June 18, 2025 to receive reports from its professional staff.
- Thursday, June 19, 2025, Juneteenth, is a legal Holiday. The Township Administration Building and Libraries will be closed for business. There will be no refuse and recycling collection.
- A Capital Improvement Plan (CIP) Workshop will be held on Wednesday, June 25, 2025 at approximately 6:00 p.m.
- Friday, July 4, 2025, Independence Day, is a legal Holiday. The Township Administration Building and Libraries will be closed for business. There will be no refuse and recycling collection.

6. Public Privilege of the Floor

The Floor is open to provide the opportunity for the public to address the Board on any non-agenda item or any other public matter in which the Township has jurisdiction or authority.

Response to Public Privilege of the Floor - Appropriate time for any member of the Board, the Township Manager, or designated staff person to address and correct any statement made by a member of the public during the Public Privilege portion of the agenda.

7. Public Comment

The Floor is open to provide the opportunity for the public to address the Board on matters relating to agenda items which will be voted upon at this meeting.

Response to Public Comment - Appropriate time for any member of the Board, the Township Manager, or designated staff person to address or respond to any statement made by a member of the

public during the Public Comment portion of the agenda.

8. Consent Calendar

Consent Calendar items are grouped together in the last section of the agenda which is marked "Consent Calendar." If there is a request from any member of the Board for separate discussion of any item listed on the Consent Calendar, the item will be removed from the Consent Calendar and considered during the appropriate Committee portion after non-consent items listed under that Committee are addressed.

- a. APPROVAL OF A POLICE COMMAND STAFF SALARY RESTRUCTURING PLAN
- b. AUTHORIZATION TO RELEASE FUNDS HELD IN ESCROW
- c. RESOLUTION - AUTHORIZATION OF APPOINTMENT TO THE ARDMORE INITIATIVE BOARD OF DIRECTORS
- d. APPROVAL OF CERTIFICATES OF APPROPRIATENESS
- e. RESOLUTION - ADOPTION OF COMMUNITY DEVELOPMENT BLOCK GRANT FIVE-YEAR CONSOLIDATED PLAN 2025-2029 AND ANNUAL ACTION PLAN FOR YEAR LI (2025-2026)
- f. RESOLUTION - INDICATING THE NEW GRANT IDENTIFICATION NUMBER AND REAUTHORIZING EXECUTION OF GRANT RELATED DOCUMENTS FOR THE PARKSIDE-CYNWYD EXTENSION OF THE CYNWYD HERITAGE TRAIL PROJECT
- g. AUTHORIZATION TO ADVERTISE ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC - AUTOMATED RED LIGHT ENFORCEMENT
- h. RECEIPT OF THE TOWNSHIP PARKING MANAGEMENT PLAN FOR THE ARDMORE COMMERCIAL DISTRICT
- i. RESOLUTION - AUTHORIZING A GRANT APPLICATION TO THE PENNSYLVANIA DEPARTMENT OF COMMUNITY & ECONOMIC DEVELOPMENT (DCED) FOR FUNDING VARIOUS MULTI-MODAL TRANSPORTATION IMPROVEMENTS
- j. RESOLUTION - AUTHORIZING IMPLEMENTATION OF THE COMPREHENSIVE SAFETY ACTION PLAN AND COMMITTING TO REDUCE TRAFFIC FATALITIES AND SERIOUS INJURIES

9. Administrative and Human Resources Committee

- a. The Consent Calendar contains items referred from the June 4, 2025 meeting of this Committee (item a).

10. Building and Planning Committee

- a. The Consent Calendar contains items referred from the June 11, 2025 meeting of this Committee (items b - d).

11. Finance Committee

- a. AWARD OF CONTRACT – HOUSING NEEDS ASSESSMENT AND ACTION PLAN

12. Grants and Community Development Committee

- a. The Consent Calendar contains items referred from the June 11, 2025 meeting of this Committee (item e).

13. Parks and Recreation Committee

- a. The Consent Calendar contains items referred from the June 11, 2025 meeting of this Committee (item f).

14. Police Committee

- a. The Consent Calendar contains items referred from the June 4, 2025 meeting of this Committee (items g - h).

15. Public Works Committee

- a. RESOLUTION - AUTHORIZING EXECUTION OF A CONSENT ORDER
REQUIRING THE UPDATE OF THE ACT 537 SEWAGE PLAN FOR
GLADWYNE/VILLANOVA
- b. The Consent Calendar contains items referred from the June 4, 2025 meeting of this Committee (items i - j).

16. Adoption of Ordinances

- ADOPTION OF ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC -
REGULATION OF ELECTRIC VEHICLE CHARGING STATIONS ON MUNICIPAL
LOT 7
- ADOPTION OF ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC -
REGULATION OF IMMOBILIZATION DEVICES
- ADOPTION OF ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC -
POLICE TOWING FEES

17. Unfinished Business

18. New Business

19. Adjournment



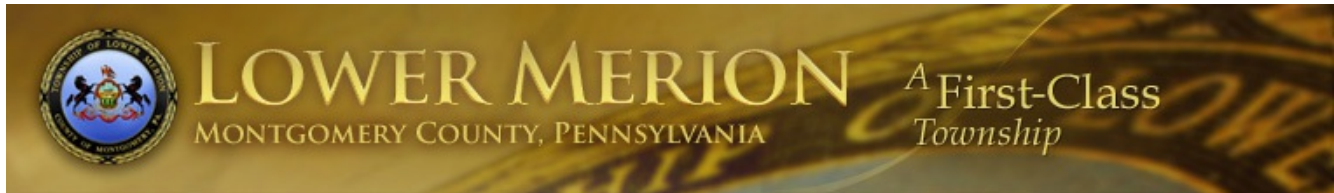
AGENDA ITEM INFORMATION

COMMITTEE: Administrative and Human Resources Committee

ITEM: APPROVAL OF A POLICE COMMAND STAFF SALARY RESTRUCTURING PLAN

Consider for approval a restructuring of the Police Command Staff Compensation Plan to include the following:

1. Effective the date of promotion, the 2025 probationary salary for any individual promoted to Probationary Lieutenant will be revised from \$157,117 to \$164,326 and they will receive no further longevity payments.
2. Effective 1-1-2026, the Probationary Lieutenant salary of \$164,326 will be adjusted by any salary increase approved by the Board of Commissioners for 2026.
3. Upon completing the one-year probationary period, the promoted individual will receive the full 2025 Lieutenant salary revised from \$164,986 to \$177,000 adjusted by any salary increase approved by the Board of Commissioners for 2026.
4. Effective 1-1-2026, the full Lieutenant salary for the 4 current command staff members is revised from \$164,986 to \$177,000 plus any salary increase approved by the Board of Commissioners for 2026.
5. Effective 1-1-2026, the full Captain salary for the 2 current command staff members is revised from \$188,321 to \$202,000 plus any salary increase approved by the Board of Commissioners for 2026.
6. To mitigate the verified negative effect on pension calculations, the 4 command staff members who have not had their pension calculations already calculated/finalized will receive 1 additional final longevity payment in January 2026.
7. Two command staff members who previously entered the Deferred Retirement Option program have already had their pension calculation finalized. These 2 staff members will not receive any additional longevity payment; however, they will each receive a one-time payment in January that will make them whole with respect to total compensation out to their mandatory retirement date.
8. Except for the above restructuring payments mentioned above, Longevity as a benefit is eliminated for all existing and future Police Command staff.



AGENDA ITEM INFORMATION

COMMITTEE: Building and Planning Committee

ITEM: AUTHORIZATION TO RELEASE FUNDS HELD IN ESCROW

Consider for approval to release funds held in escrow as Improvement Guarantees in accordance with §135-7 of the Township Code for the following:

211 Belmont Avenue (LOWM 248.40)

LCB Senior Living Development

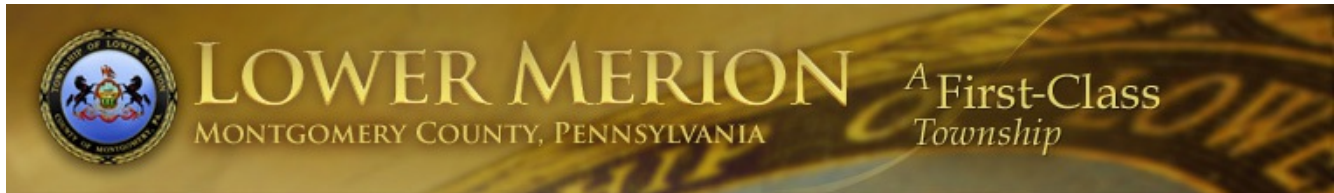
Escrow Release No. 6 (FINAL)

Amount \$ 8,630.00

37 Simpson Road Subdivision (LOWM 256.57)

Escrow Release No. 1 (FINAL)

Amount \$ 150,650.00



AGENDA ITEM INFORMATION

COMMITTEE: Building and Planning Committee

ITEM: RESOLUTION - AUTHORIZATION OF APPOINTMENT TO THE ARDMORE INITIATIVE BOARD OF DIRECTORS

Consider for adoption a Resolution to appoint Peter Spain to the Board of Directors of the Ardmore Initiative for a term that expires January 7, 2030.

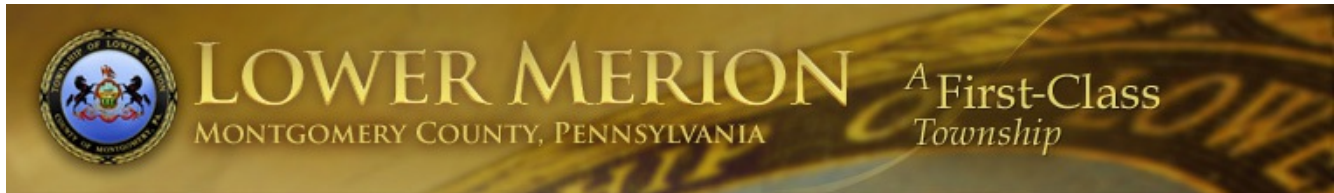
RESOLUTION

WHEREAS, vacancies currently exist on the Board of Directors of the Ardmore Initiative, and

WHEREAS, the Articles of Incorporation and By-Laws, as amended, of the Ardmore Initiative provide that a member of the Board of Directors be appointed by the governing body of the Township of Lower Merion through a resolution of the Board of Commissioners.

NOW, THEREFORE, BE IT RESOLVED by the Board of Commissioners of the Township of Lower Merion that the following individuals are hereby appointed to the Board of Directors of the Ardmore Initiative to serve the term(s) indicated:

<u>Name</u>	<u>Term Commences</u>	<u>Term Expires</u>
Peter Spain	June 18, 2025	January 7, 2030



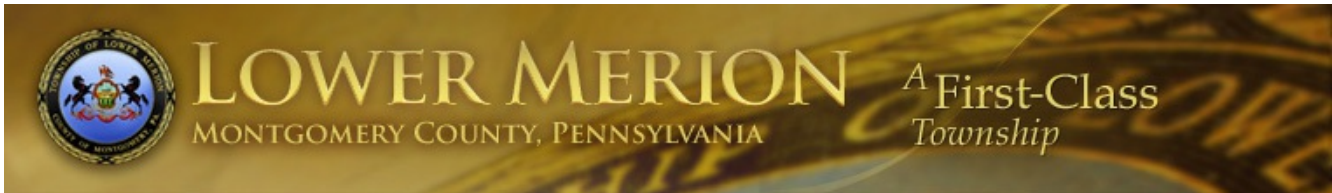
AGENDA ITEM INFORMATION

COMMITTEE: Building and Planning Committee

ITEM: APPROVAL OF CERTIFICATES OF APPROPRIATENESS

Consider for approval the following certificate of appropriateness as recommended by the Building & Planning Committee at their meeting held on June 11, 2025:

- a) 7 East Lancaster Avenue, Ardmore Commercial Historic District, 25-14 – approval to replace one existing rooftop cellular antenna and add one antenna to an existing sled mount on the rooftop, citing Secretary of the Interior's Standards 9 and 10.



AGENDA ITEM INFORMATION

COMMITTEE: Grants and Community Development Committee

ITEM: RESOLUTION - ADOPTION OF COMMUNITY DEVELOPMENT BLOCK GRANT FIVE-YEAR CONSOLIDATED PLAN 2025-2029 AND ANNUAL ACTION PLAN FOR YEAR LI (2025-2026)

Consider for adoption a Resolution for the adoption of the Five-Year Consolidated Plan 2025-2029 and the Annual Action Plan for Year LI in the amount of \$984,616, and the filing of Fund Year LI CDBG application including all Assurances and Certifications therein.

RESOLUTION

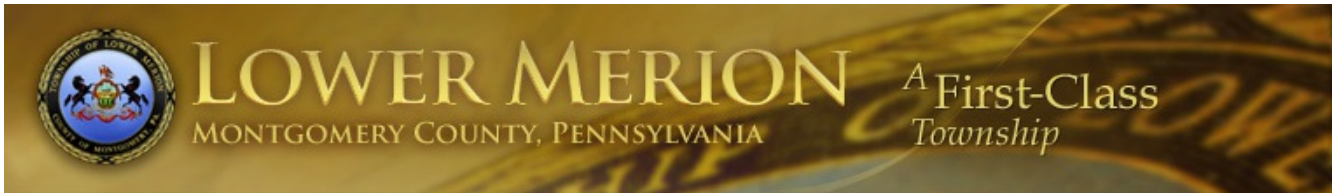
WHEREAS, the Township of Lower Merion is entitled to receive Federal financial assistance under the provisions of the Housing and Community Development Act of 1974, PL 93-383, as amended; and,

WHEREAS, to secure such financial assistance, it is necessary to file a Five-Year Consolidated Plan for Fiscal Years 2025-2029 and an Annual Action Plan for Fiscal Year 2025-2026 with the Department of Housing and Urban Development; and,

WHEREAS, the Housing and Community Development Act of 1974, as amended, requires each municipality to give certain assurances with respect to the Community Development Block Grant funds:

NOW, THEREFORE, BE IT RESOLVED, that:

1. The Township's Community Development Block Grant Five-Year Consolidated Plan (2025-2029) and Annual Action Plan (2025) attached hereto and made a part hereof, dated June 18, 2025 is hereby approved.
2. The Township Manager of the Township of Lower Merion is hereby authorized as follows:
 - (a) to file said Plans and amendments with the Department of Housing and Urban Development (HUD); and
 - (b) to serve as authorized representative of the Township of Lower Merion in connection with the Community Development Block Grant Program and to provide such additional information as may be required.
3. The Secretary of the Department of Housing and Urban Development be, and hereby is, assured of full compliance by the Township of Lower Merion to the assurances attached thereto and made a part hereof.



AGENDA ITEM INFORMATION

COMMITTEE: Parks and Recreation Committee

ITEM: RESOLUTION - INDICATING THE NEW GRANT IDENTIFICATION NUMBER AND REAUTHORIZING EXECUTION OF GRANT RELATED DOCUMENTS FOR THE PARKSIDE-CYNWYD EXTENSION OF THE CYNWYD HERITAGE TRAIL PROJECT

Consider for adoption a resolution indicating the new grant identification number and reauthorizing the Township Manager to execute all documents and agreements, including reimbursement agreements, between the Township of Lower Merion and the Delaware Valley Regional Planning Commission (DVRPC) related to the Parkside-Cynwyd Extension of the Cynwyd Heritage Trail.

RESOLUTION

WHEREAS, the Township of Lower Merion was awarded a PennDOT Transportation Assistance Program (TAP) grant in 2018 in the amount of \$533,997 for construction costs of the Parkside-Cynwyd Extension of the Cynwyd Heritage Trail; and

WHEREAS, the Township of Lower Merion was awarded an additional PennDOT Transportation Assistance Program (TAP) grant in 2022 in the amount of \$521,343 for a total grant amount of \$1,055,340; and

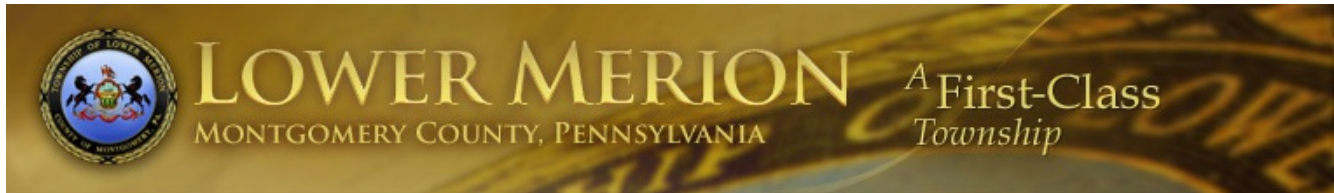
WHEREAS, the Township of Lower Merion was awarded an additional PennDOT Transportation Assistance Program (TAP) grant in 2023 in the amount of \$292,687 for a total grant amount of \$1,348,027; and

WHEREAS, the Township of Lower Merion was awarded an additional PennDOT Transportation Assistance Program (TAP) grant in 2024 in the amount of \$491,669 for a total grant amount of \$1,839,696; and

WHEREAS, the Township of Lower Merion was awarded an additional PennDOT Transportation Assistance Program (TAP) grant in 2025 in the amount of \$410,300 for a total grant amount of \$2,249,996; and

WHEREAS, this grant award requires the execution of various documents and agreements between the Township, PennDOT and the Delaware Valley Regional Planning Commission (DVRPC) which administers the grant program and Southeastern Pennsylvania Transportation Authority (SEPTA) which owns the land.

NOW, THEREFORE, BE IT RESOLVED that the Board of Commissioners of the Township of Lower Merion hereby authorizes Ernie B. McNeely, Township Manager, to execute all documents and agreements between the Township of Lower Merion, PennDOT, SEPTA and DVRPC related to Transportation Alternatives Set Aside Program Reimbursement Grant Agreement #R22060003-4 for the Parkside-Cynwyd Extension of the Cynwyd Heritage Trail.

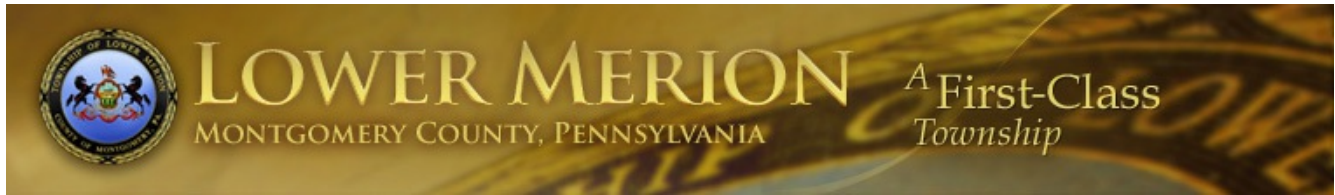


AGENDA ITEM INFORMATION

COMMITTEE: Police Committee

ITEM: AUTHORIZATION TO ADVERTISE ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC - AUTOMATED RED LIGHT ENFORCEMENT

Consider for approval authorizing the Township Secretary to advertise notice of intent to adopt an ordinance to amend the Code of the Township of Lower Merion, Chapter 145, Vehicles and Traffic, by the addition of a new Article XIII, Automated Red Light Enforcement, to provide for the adoption of an automated red light enforcement system at designated intersections in the Township, to provide a civil penalty and the use thereof for traffic signal violations at those intersections if recorded on a camera, to provide for limited use of camera recordings, to provide reporting obligations concerning violations and the collection of fines on the part of the Township, to provide for notice of violation to the vehicle owner, to provide defenses for violations and a procedure for a hearing and appeals therefrom.



AGENDA ITEM INFORMATION

COMMITTEE: Police Committee

ITEM: RECEIPT OF THE TOWNSHIP PARKING MANAGEMENT PLAN FOR THE ARDMORE COMMERCIAL DISTRICT

Consider for approval receiving the Township Parking Management Plan for the Ardmore Commercial District.



AGENDA ITEM INFORMATION

COMMITTEE: Public Works Committee

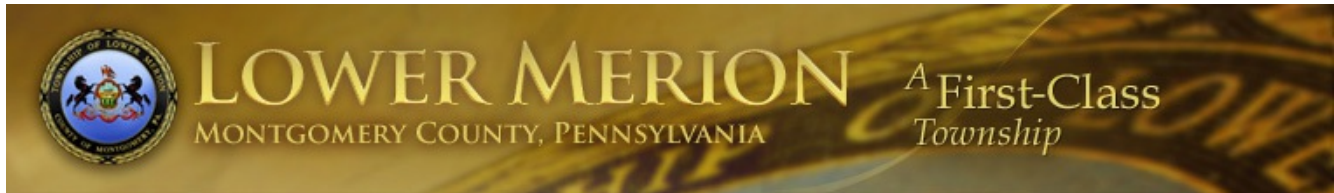
ITEM: RESOLUTION - AUTHORIZING A GRANT APPLICATION TO THE PENNSYLVANIA DEPARTMENT OF COMMUNITY & ECONOMIC DEVELOPMENT (DCED) FOR FUNDING VARIOUS MULTI-MODAL TRANSPORTATION IMPROVEMENTS

Consider for adoption a resolution authorizing the submittal of a grant application to the DCED for \$3 million in funding for sidewalks, crosswalks, intersection upgrades, and other multi-modal transportation improvements.

RESOLUTION

BE IT RESOLVED, that the Board of Commissioners of Lower Merion Township in Montgomery County hereby request a Multimodal Transportation Fund grant of \$3,000,000 from the Commonwealth Financing Authority to be used for sidewalk and multi-modal infrastructure improvements as part of the Township-Wide Priority Sidewalk initiative.

BE IT FURTHER RESOLVED, that the Applicant does hereby designate Brandon Ford, Assistant Township Manager and Paul McElhaney, Director of Public Works as the official(s) to execute all documents and agreements between the Township of Lower Merion and the Commonwealth Financing Authority to facilitate and assist in obtaining the requested grant.



AGENDA ITEM INFORMATION

COMMITTEE: Public Works Committee

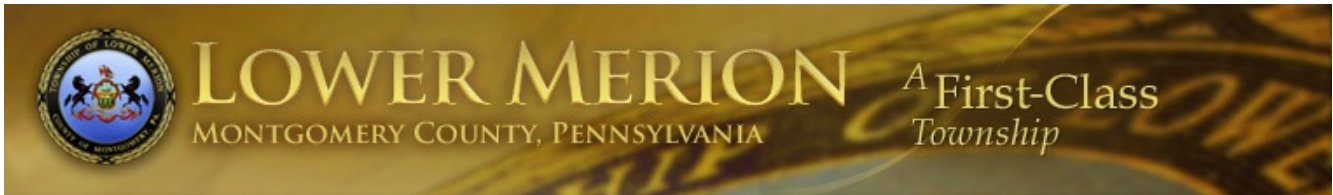
ITEM: RESOLUTION - AUTHORIZING IMPLEMENTATION OF THE COMPREHENSIVE SAFETY ACTION PLAN AND COMMITTING TO REDUCE TRAFFIC FATALITIES AND SERIOUS INJURIES

Consider for adoption a resolution authorizing implementation of the Township's Comprehensive Safety Action Plan which establishes a goal of reducing roadway fatalities and serious injuries by 50% by the year 2030, with the ultimate objective of eliminating such incidents entirely.

RESOLUTION

BE IT RESOLVED, that the Board of Commissioners of Lower Merion Township in Montgomery County hereby request a Multimodal Transportation Fund grant of \$3,000,000 from the Commonwealth Financing Authority to be used for sidewalk and multi-modal infrastructure improvements as part of the Township-Wide Priority Sidewalk initiative.

BE IT FURTHER RESOLVED, that the Applicant does hereby designate Brandon Ford, Assistant Township Manager and Paul McElhaney, Director of Public Works as the official(s) to execute all documents and agreements between the Township of Lower Merion and the Commonwealth Financing Authority to facilitate and assist in obtaining the requested grant.



AGENDA ITEM INFORMATION

COMMITTEE: Finance Committee

ITEM: AWARD OF CONTRACT – HOUSING NEEDS ASSESSMENT AND ACTION PLAN

Consider for approval to award a contract for a Housing Needs Assessment and Action Plan to HR&A Advisors in accordance with proposals received on Thursday, April 10, 2025 at 5:00 P.M. prevailing time and the recommendation of the Finance Committee:

HR&A Advisors	
Total Not-to-Exceed Fee:	<u>\$65,000.00</u>

ADDITIONAL INFORMATION:

Funds are available through the Affordable Housing Fund. The budget for this project was \$65,000. The award is for a not-to-exceed fee of \$65,000 which matches the budget estimate for this activity.

ATTACHMENTS:

Description	Type
<input type="checkbox"/> AWARD OF CONTRACT – HOUSING NEEDS ASSESSMENT AND ACTION PLAN	Issue Briefing
<input type="checkbox"/> AWARD OF CONTRACT – HOUSING NEEDS ASSESSMENT AND ACTION PLAN	Backup Material

TOWNSHIP OF LOWER MERION
Finance Committee
Issue Briefing

Topic: Lower Merion Township Housing Assessment & Action Plan

Prepared By: Charlie Doyle, Assistant Director, Department of Building & Planning
Adam Szumski, Chief Financial Officer

Date: May 30, 2025

I. Action To Be Considered By The Board:

Award of a professional services contract to HR&A Advisors for a Housing Assessment & Action Plan in the amount of \$65,000.

II. Why This Issue Requires Board Consideration:

It is Township policy to seek Board approval for professional services contracts.

III. Current Policy Or Practice (If Applicable):

Members of the Board of Commissioner Ad-Hoc Affordable Housing Committee regularly meet to discuss affordable housing initiatives and guide staff on maintaining and enhancing the existing, established affordable housing stock as well as strategies that would increase attainable and affordable housing. In effort to examine policies that will lead to greater attainable housing, the Ad-Hoc Committee recommended retention of a consultant to examine the current housing conditions within the Township, identify gaps and challenges to increasing attainable housing, establishing goals for policy and develop strategies or actions that achieve identified goals.

The Township currently draws upon the Housing Element of the Lower Merion Township Comprehensive Plan for policy guidance regarding affordable housing. Specifically, the Housing Element outlines several recommendations to protect affordable neighborhoods within the Township, while seeking to create additional affordable units where appropriate. These recommendations include, but are not limited to:

1. Stabilize low- and moderate-income neighborhoods to prevent deterioration of housing and facilities.
2. Encourage sites for elderly and low- and moderate-income housing through redevelopment or adaptive reuse, preferably near shopping and public transportation.
3. Increase the supply of affordable rental housing units for the elderly and other low-income households.
4. Encourage support of county and federal housing programs to aid the elderly and low- and moderate-income families.

5. Explore ways to offset the likely decrease in outside funding by implementing new tools, such as an Affordable Housing Fund, or establishing inclusionary housing provisions with a fee-in-lieu option.

IV. Other Relevant Background Information:

In April 2025, the Township advertised a Request for Proposal seeking a qualified consultant to develop a comprehensive Housing Needs Assessment and Action Plan that identifies a range of implementation tools and strategies to further the overall goal of providing a variety of workforce and affordable housing opportunities for households of all types, ages, and income levels in Lower Merion Township.

The Township received a total of eleven (11) proposals from various planning consulting and professional housing policy firms. After reviewing the proposals, Township staff recommended the firm HR&A Advisors as its selected candidate. While a number of proposals were of very high quality, the proposal from HR&A included detailed data analysis, demonstrating their examination of housing would rely more on customized consulting services and strategies and less on the background analysis because it has already been compiled by their team.

V. Impact On Township Finances:

The estimated cost for consulting services totals \$65,000 is budgeted in 2025 and will be allocated from the Township Affordable Housing Fund.

VI. Staff Recommendation:

Staff recommends award of a professional services contract to HR&A Advisors for a Housing Assessment & Action Plan, as described in their submitted Scope of Work.

Lower Merion Township Housing Needs Assessment & Action Plan

Proposal | April 10, 2025

Phillip Kash, Partner-in-Charge

pkash@hraadvisors.com, (202) 903-0725



HR&A

April 10, 2025

Charles Doyle
Assistant Director for Planning
Lower Merion Township
75 E. Lancaster Avenue
Ardmore, PA 19003

Dear Mr. Doyle:

HR&A Advisors is pleased to submit our proposal for the Lower Merion Township Housing Needs Assessment and Action Plan. As a firm with over forty years of experience creating more equitable, resilient, and dynamic communities, we are uniquely positioned to deliver a comprehensive housing needs analysis and action plan that will inform actionable strategies for the Township's future housing landscape.

Our team brings both deep local knowledge and national expertise. We have worked extensively across Pennsylvania, including with the Philadelphia City Planning Commission on a Comprehensive Plan Framework, the City of Philadelphia on an Economic Development Incentives Toolkit, and the Philadelphia City Council on a Poverty Reduction Strategy with a strong affordable housing and workforce development focus. We've also supported the Pittsburgh Urban Redevelopment Authority with an Organizational Strategy to increase implementation capacity and helped design key programs for the Pittsburgh Housing Opportunity Fund, including rental assistance, housing stabilization, and downpayment and rehabilitation assistance.

Beyond Pennsylvania, we bring extensive experience conducting housing needs assessments and developing strategic action plans in communities of all sizes—from Wake County, NC and Norfolk, VA to Montgomery County, MD and Stamford, CT. Our work with the Maine Governor's Office, the Fargo-Moorhead region, and cities like Charlottesville, VA and Hayward, CA has given us valuable insight into the diverse housing challenges and opportunities facing local governments today.

A unique advantage we offer is [HousingWeaver](#), a proprietary data tool we have developed that streamlines and accelerates the data analysis required for a Housing Needs Assessment and Market Analysis. This means that we will use less time and budget on putting together ACS, BLS, PUMS, CoStar and HUD data, and more time focused on tailored analysis and strategy development focused on the Township's needs—including priority concerns on NOAH preservation, new workforce and affordable housing development, and coordination and capacity building across the housing ecosystem.

The enclosed proposal outlines our approach to delivering a holistic view of housing needs across the income spectrum, analyzing current and future housing needs across household types, preservation and development barriers for affordable housing stock, and evaluating funding mechanisms. Our team brings extensive experience in housing needs assessments nationwide and is committed to providing Lower Merion Township with insights that drive meaningful action.

We look forward to the opportunity to support Lower Merion Township in creating a housing landscape that meets the needs of all community members. Please feel free to contact me directly with any questions.

Sincerely,



Phillip Kash
Partner, HR&A Advisors Inc.
202-903-0725 | pkash@hraadvisors.com
925 15th Street NW, Third Floor, Washington, DC 20005

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Firm Overview

HR&A Advisors, Inc. (HR&A) helps create more equitable, resilient, and dynamic communities.

Our work turns vision into action through rigorous analysis, strategy development, and implementation planning. We have provided strategic advisory services for some of the most complex mixed-use, neighborhood, downtown, campus, and regional development projects across North America and abroad for over forty years.

We have offices in New York, Los Angeles, Atlanta, Dallas, Raleigh, and Washington DC, a presence that allows us to serve clients all over the world.

From Southern California to Brooklyn, and London to Medellín, we have guided hundreds of clients in transforming real estate and economic development concepts, and public infrastructure, first into actionable plans then into job-producing, community-strengthening assets. We have served a range of clients – real estate owners and investors, hospitals and universities, cultural institutions, community development organizations.

About HR&A

HR&A Advisors, Inc. (HR&A) is an employee-owned company advising public, private, non-profit, and philanthropic clients on how to increase opportunity and advance quality of life in cities. We believe in creating vital places, building more equitable and resilient communities, and improving people's lives.

Mission Statement

HR&A's mission is to ensure implementation of our clients' aspirations: to create vital places, build more equitable and resilient communities, and improve people's lives.

Our Culture

We are former public servants, urban planners, designers, city officials, activists, real estate developers, and economists. We create value for our clients by integrating multiple disciplines and leading teams with architects, engineers, lawyers, community organizers, and other specialists.

Nearly everything we do is a team effort, internally, with other professional services firms, and clients. Collaboration, trust, and integrity are important components of our culture. This sense of team extends to our ownership structure: we are 100% employee-owned. Our staff is data-driven, creative, and dedicated.

We believe in and support our employees' growth and advancement. Many of the firm's senior leaders started off as analysts. Within our collaborative work environment employees learn new skills and earn additional responsibilities. In addition to a supportive work environment, HR&A offers an annual stipend to assist in professional development.

HR&A's Housing Practice

We work with city, county and state governments to help them shape housing markets that meet the needs of all members of the community. We work with our clients to help them understand their housing needs, create community plans and strategies, design housing policies and programs, and structure housing transactions. Creating a housing market that meets the needs of all members of the community requires a comprehensive approach that combines land use regulations, public subsidy and tenants' rights. We work across each of these areas to create land use regulations that allow a diverse supply of housing that expands with the local economy, to efficiently target public subsidy to close the gap between what households can afford to pay for a home and what it costs to build and maintain that home, and to establish a balance between the interests of property owners and renter occupants.

The Housing Practice works on housing affordability across scales – from the adoption of regional and city housing plans, through the creation of housing policies and programs to advance those plans, to the execution of specific housing development and preservation projects that are the product of those policies. Our ability to operate from the strategic to the project level better positions us to help our clients achieve their housing goals. Finally, housing affordability is a broad term that encompasses many different priorities – preventing displacement, increasing homeownership, creating workforce housing, improving housing, addressing racial inequity, etc. We work closely with clients and the community to establish clear priorities and solutions to address them.

Project Team

HR&A’s project team includes consultants with expertise in affordable housing policy, market analysis, program design and evaluation, community engagement, and related fields nationally.

Phillip Kash Partner	Phillip will be the Partner in Charge for this project. He will be responsible for overall project direction and the completion of all work and deliverables. Phillip is the head of HR&A’s affordable housing practice and has advised on the development of housing strategies, programs, loan funds, and complex transactions across the country.
Arjun Gupta Sarma Principal	Arjun Gupta Sarma will serve as the project manager . Arjun leads policy analyses and manages complex regional plans for HR&A’s housing practice.
Eva Phillips Senior Analyst	Eva Phillips, Senior Analyst, will serve as a lead analyst for the project, focused on data analysis. Eva provides expertise on housing policy, program evaluation, and data analytics.
Kirthi Balakrishnan Research Analyst	Kirthi Balakrishnan, Research Analyst, will serve as the supporting analyst for this project. Kirthi provides research and analytical support for housing and real estate projects.

Finally, the team will also be supported by **analytical staff** from HR&A’s pool of over 70 active analysts nationwide to assist with project analysis and execution. Resumes for each core team member can be found on the following pages.



Phillip Kash | Partner

Phillip Kash leads engagements on affordable housing, strategic planning and resilient disaster recovery. He has over a decade of experience designing and implementing programs and real estate development project that draw together public, private and philanthropic stakeholders to address pressing community needs.

Pronouns: He/Him/His

Education

University of North Carolina At Chapel Hill, Master of City and Regional Planning, 2008

University of North Carolina At Chapel Hill, Bachelor of Arts, Economics, 2005

Work Experience

HR&A Advisors, Inc., 2015 – Present

Enterprise Community Partners, Director, 2014 – 2015

Enterprise Community Partners, Senior Program Director, 2013 – 2014

Enterprise Community Partners, Program Director, 2010 – 2013

Enterprise Community Partners, Program Officer, 2009 – 2010

Enterprise Community Partners, Freddie Mac Fellow, 2008 – 2009

Center for Community Capital, Research Assistant, 2007 – 2008

Client Relationship Specialist, Vanguard Financial, 2006

Affiliations

District of Columbia Accessory Dwelling Unit Advancement Committee, 2017- Present

All Souls Housing, Board of Directors, 2013 – 2016

Dallas Enterprise Homeownership Partnership, Board of Trustees, 2010 – 2013

UNC Chapel Hill, University of North Carolina At Chapel Hill Admissions Committee, 2006 – 2008

Stamford Affordable Housing Strategy

On behalf of the Stamford Land Use Bureau, created a Stamford Housing Affordability Plan to actively address the economic, environmental, and social equity impacts of Stamford's affordable housing needs. The city has experienced substantial growth, which is slated to continue for the foreseeable future, but growth in housing inventory has been unevenly distributed throughout the city, placing disproportionate pressure on some neighborhoods. The Plan provides a housing needs assessment and comprehensive market analysis, which serve as the foundation for the targeted regulatory and funding recommendations in the Plan. Finally, analyzed the efficacy of the City's existing inclusionary zoning program and made recommendations to adjust the administration and fee-in-lieu payment option based on current market conditions and the capacity of City staff. Also advised the City on their new Housing Trust Fund, which adds important standards, governance, and oversight to the City's funding of affordable housing projects. In 2022, Stamford's Plan received the top score overall, and in all categories, among 17 local housing plans compared and assessed by Fairfield County's Center for Housing Opportunity (FCCHO).

Greensboro Affordable Housing Plan

Supported development of Housing GSO, a 10-Year Comprehensive Affordable Housing Plan for the City of Greensboro, NC. The Plan focuses on: 1) the current need for affordable housing in the city, 2) how this need will shift into the future, 3) viable solutions going forward, and 4) the capacity to implement over the 5- and 10-year horizons. Conducted a market analysis of Greensboro's existing conditions, formed recommendations and strategies to guide the City's affordable housing efforts, and made recommendations for the re-structuring of the city's Neighborhood Development Department to efficiently carry out new and existing programs. Formation of the Plan has been accompanied by a robust engagement process with City Council members, municipal leaders and departments, neighborhood organizations, philanthropic organizations, non-profit service providers, and Greensboro residents. Greensboro City Council approved Housing GSO in October 2020.

Program Design for Pittsburgh's Housing Opportunity Fund

Facilitated the launch of Pittsburgh's Housing Opportunity Fund on behalf of the Urban Redevelopment Authority of Pittsburgh, a \$10 million annual

public funding initiative for new and existing housing programs. Collaborated with a board of local housing experts and advocates to develop an annual allocation plan maximizing impact and addressing critical housing needs. Drafted program guidelines and supporting documentation, including scoring criteria and narrative applications, across a diverse set of housing programs. Successfully established five key programs in 2018: housing stabilization and short-term rental assistance, rental gap financing for affordable multifamily developments, homeowner rehabilitation loan program, acquisition-rehabilitation-resale program, and down payment/closing cost assistance.

Amazon Housing Equity Fund

Supported program design and implementation for Amazon's Housing Equity Fund, a \$2 billion commitment to preserve and create 20,000 affordable homes through below-market loans and grants to housing partners, public agencies, and minority-led organizations. Created an affordable housing finance summary of potential investment strategies, conducted a landscape analysis of peer investments in housing, worked with Amazon to refine investment goals and priorities, and developed a clear and concise financial framework to evaluate potential investment options. Conducted an initial market scan in target geographies, assessed the housing need in those geographies to evaluate programmatic components, and conducted high-level financial analysis to test investment portfolio scenarios. Worked closely with Amazon to launch the Housing Equity Fund in January 2021 and continuing to support Amazon in implementation of the program, including underwriting and transaction closing support.

Charlottesville Affordable Housing Strategy & Comprehensive Plan Update

Worked with the City of Charlottesville, Virginia to develop an affordable housing plan with a focus on racial equity, as part of a larger planning effort led by RHI, which includes updates to the City's comprehensive plan, called "Cville Plans Together". Engaged extensively with multiple stakeholder groups including local residents, developers, nonprofit service providers, City staff, and elected officials to understand key challenges and areas of opportunity to support a comprehensive approach to housing affordability in Charlottesville. Developed recommendations to amend the City's governance of housing funds, set target funding for housing programs, adjust land use policies and affordable housing programs, and pursue additional policy changes to enhance racial equity and affordability in housing. Recommendations will be incorporated in the comprehensive plan update as well as a zoning rewrite facilitated by partner firm Code Studio.



Pronouns: He/Him/His

Arjun Gupta Sarma | Principal

Arjun leads digital product development at HR&A, leveraging quantitative methods, data science, web development, and policy to create interactive tools for clients nationwide. He develops dashboards, spatial analyses, and policy calculators to monitor housing markets, analyze development impacts, and promote equitable outcomes, as seen in the Texas Digital Opportunity Hub, Florida Apartment Scarcity Dashboard, and Indiana Housing data repository. Previously, Arjun developed GIS tools for the City of Austin and provided market analysis support for main street organizations in Boston as a Harvard Joint Center for Housing Summer Fellow.

Education

Harvard University, Master in Urban Planning, Real Estate and Urban Development, 2017

University of California – Berkeley, BA – Political Economy, 2014

Work Experience

HR&A Advisors, Inc., 2017 – Present

Harvard Joint Center for Housing Studies, Summer Fellow, Greater Ashmont Main Street, 2016

City of Austin Code Department, Research Analyst, 2014 - 2015

Austin Energy Green Building, Research Analyst Intern, 2014

UC Berkeley Institute of Urban & Regional Development, Golden Gate Initiative, Research Assistant, 2012 – 2014

Michigan State Housing Dashboard

On behalf of the Michigan Municipal League (MML), and in collaboration with the Michigan State Housing Development Authority (MSHDA), led the development of a statewide housing dashboard to reach a broad group of housing stakeholders across the state with accessible data organized around the State's housing goals. Worked with focus groups made up of local housing officials, state housing professionals, housing developers, advocates and others to define the product requirements and prioritize metrics and indicators to be included in the dashboard. Upon completion of the draft dashboard, held user testing with the focus groups to gather feedback and refine the dashboard.

Child Action Poverty Lab Rental Housing Needs Assessment Report and Bond Calculator

Produced a comprehensive Rental Housing Needs Assessment report that provided detailed insights into demographic and economic conditions, current housing needs, and a future housing gap analysis for Dallas residents. Developed an interactive housing bond sizing tool based on detailed analyses of current and future housing gaps. This tool is designed to inform discussions surrounding a potential housing bond in Dallas by allowing users to simulate different bond commitments.

Montgomery County Preservation Study

Led a study to assess Montgomery County's current and future housing needs in support of the County's Thrive Montgomery 2050 general plan update. Analyzed demographic, economic, and housing market conditions, both benchmarking the county to its regional context and examining intra-county submarket trends. The study then identified and quantified the county's housing needs, understood as not only the overall supply of housing required to accommodate county growth, but also the tenure, affordability, and types of housing required.

Philadelphia Community Resource Centers

With the City of Philadelphia, led a feasibility analysis and implementation strategy for the deployment of community resource centers (“CRCs”), neighborhood-based one-stop centers that would offer holistic education, workforce, and other social services for justice-involved populations. Drew on quantitative and geographic data, as well as extensive stakeholder interviews and research, to recommend the target population, location, mix of services, community engagement tactics, management strategies, funding outlook, and cost-benefit structure well-suited to the City. Guiding long-term implementation and governance with a roadmap that lays out concrete steps to stand up CRCs, with the goal of reducing the rates of incarceration and recidivism, transforming the relationship between criminal justice and local neighborhoods, and building a model for cities across the United States.

New Haven Inclusionary Zoning

Developed and recommended an Inclusionary Zoning (IZ) ordinance for New Haven, incorporating input from diverse stakeholders to promote long-term affordability and inclusive growth. Analyzed real estate market conditions, assessed incentive tools, and engaged public/private sectors to understand market dynamics across neighborhoods. Conducted financial pro forma analyses across building types and submarkets to evaluate IZ policy impact on development feasibility and the effectiveness of local incentives. Proposed a balanced IZ policy tailored to local market strength. The City adopted an IZ policy in January 2022 based on HR&A's framework and affordability requirements, and HR&A further assisted with implementation guidelines.

Housing Policy and Affordability Calculator

Created an interactive and user-friendly webtool that supports policy conversations by illustrating the tradeoffs between housing affordability and other public goals. Interviewed numerous local developers, policymakers, and academic economists to develop sound assumptions and methodologies. Designed the underlying financial and economic models for the calculator that quantifies the impact of local policies on housing affordability and availability. Assisted with rollout and oversaw iterations of feedback, test runs, and edits. Drafted a public-facing white paper detailing the existing literature, project methodology, and key findings.

Florida Housing Dashboard

For the Florida Apartment Association (FAA), HR&A developed an interactive web-based dashboard tool for residents and policymakers to track Florida's rapidly growing housing needs at the county and metro-area level. The tool builds on previous phases of housing work for FAA that identified and quantified housing development cost drivers and demonstrated the positive supply impacts provided by select incentive tools.



Pronouns: She/Her/Hers

Eva Phillips | Senior Analyst

Eva Phillips is a Senior Analyst in HR&A's New York office, where she advances housing and economic development strategies nationwide. Her expertise lies at the intersection of housing policy, program evaluation, and data analytics. Before joining HR&A, Eva served as a Senior Data Analyst at Enterprise Community Partners, where she developed and evaluated the impact of housing initiatives in cities across the country. During her graduate studies, she worked at the NYU Furman Center, designing policy and program interventions aimed at promoting renter stability and preventing eviction.

Education

New York University - Master of Urban Planning, 2024

University of California, Berkeley – BA Urban Data Analytics, Minor in Geographic Information Science, 2018

Work Experience

HR&A Advisors, Inc., 2023 - Present

NYU Furman Center for Real Estate and Urban Policy, Graduate Researcher, 2022-2024

Enterprise Community Partners, Senior Analyst, 2020-2022

City of Oakland Department of Transportation, Transportation Analyst, 2018-2019

UC Berkeley Urban Displacement Project, Research Coordinator, 2017-2018

Dallas Housing Needs Assessment

On behalf of the Dallas Child Poverty Action Lab (CPAL), HR&A conducted a comprehensive Rental Housing Needs Assessment for Dallas, TX. The assessment provided an in-depth analysis of the city's demographic and economic conditions, current housing needs, and housing supply gaps by income level. It also included projections of future housing needs based on anticipated job and population growth. The study featured a detailed examination of Dallas's deed-restricted and naturally occurring affordable housing (NOAH) stock, highlighting shifts in the rental housing market over time, the affordability gap, and how this gap is expected to evolve in the future.

State of Maine Housing Production Strategy

On behalf of the Maine Governor's Office of Policy Innovation and the Future (GOPIF), developed comprehensive policy recommendations to increase housing production across the state by addressing financial, regulatory, workforce, and public-sector capacity barriers. Interviewed developers, municipal officials, state agencies, and housing professionals, and analyzed best practices from across the country. The resulting study identifies key factors constraining housing production and escalating construction costs in Maine and proposes strategies tailored to the state's unique challenges, emphasizing the roles of the state, municipalities and the private sector.

Wake County Housing Data Portal

On behalf of the Wake County Department of Housing Affordability & Community Revitalization, HR&A is developing an online housing data dashboard to provide a broad group of community and housing stakeholders with accessible data organized around the County's housing needs and goals. The online data portal will provide comprehensive data to illustrate a range of housing and economic issues including rental affordability, access to homeownership, affordable housing preservation, job growth and population change, and future housing needs.

Previous Experience

Empowering Black Futures Neighborhood Program

Supported the design of a \$180 million reinvestment and wealth-building initiative across nine majority-Black communities affected by disinvestment. Engaged with selected neighborhoods to create economic mobility plans and neighborhood investment strategies, focusing on homeownership access, affordable rental housing and revitalizing small businesses and retail corridors.

COVID-19 Emergency Rental Assistance

Contributed to the design and implementation of a program providing rental assistance to New Yorkers who would not otherwise qualify for existing aid, including undocumented immigrants and shadow economy workers. Designed a data-driven allocation strategy for over \$10 million in funds, prioritizing distribution based on COVID-19 impact, housing vulnerability, and demographic need.

Innovations in Eviction Prevention

Piloted and evaluated approaches to improving renter stability and preventing eviction, focusing on alternative rent payment and security deposit structures, emergency financial assistance and financial counseling. Facilitated building partnerships between property owners, financial tech companies, and financial service providers to help low-income renters build credit, reduce reliance on payday lenders, and manage short-term financial stress.

Residential Displacement

Developed data-driven models to identify neighborhoods at risk of gentrification and displacement to inform local policy and advocacy efforts in the Bay Area, CA. Conducted peer-reviewed research on the drivers of neighborhood change and its impacts of racial segregation and housing affordability.

Previous Project Experience

Relevant Experience

Below are a few recent relevant examples of housing needs assessment work and other relevant work samples. References will be provided on request.



Client: Wake County
Location: Wake County, NC
Completed: 2025

Wake County Housing Needs Assessment & Digital Portal

The Wake County Department of Housing Affordability & Community Revitalization is committed to advancing housing stability, reducing homelessness, and revitalizing communities through innovative, data-driven, and collaborative approaches. To meet this goal, HR&A developed an online housing data platform to provide a broad group of community and housing stakeholders with accessible data organized around the County's housing goals. The online data portal provides comprehensive data to illustrate a range of housing and economic issues including rental affordability, access to homeownership, affordable housing preservation, job growth and population change, and future housing needs.



Client: Child Poverty Action Lab (CPAL)
Location: Dallas, TX
Completed: 2022

CPAL Rental Housing Needs Assessment Report and Bond Calculator

HR&A worked with the Dallas Child Poverty Action Lab to conduct a detailed current and future rental [housing needs assessment](#) for the City of Dallas. HR&A was able to quantify the gap in available homes for rent in Dallas based on an extensive study of demographic data, existing housing inventory, and projected near term supply. To allow stakeholders to explore options to address this rental housing gap, HR&A also developed an interactive bond sizing tool, customizable by housing typology and affordability level.



Client: Maine Governor's Office of Policy Innovation and the Future
Location: Augusta, ME
Completed: 2023

State of Maine Housing Production Needs & Data Portal

HR&A supported the Maine Governor's Office of Policy Innovation and the Future to quantify housing production needs across different regions in the state, focused on identifying the relationship between housing affordability and job growth, both for growing and shrinking regions. HR&A then create the [State of Maine Housing Data Portal](#), a public dashboard highlighting demographic, economic and housing trends across the state and by county, including each county's specific housing production needs as identified during [the study](#).



Sandy Springs Housing Needs Assessment

HR&A Advisors assessed Sandy Springs' housing needs to support an anticipated housing plan. Rapid population and job growth, rising housing costs, and recent building code changes were increasing displacement pressure and limiting homeownership for young families. HR&A analyzed demographic, economic, and housing market conditions to quantify the housing gap and identify needed housing types. The study highlighted the

Client: City of Sandy Springs
Location: Sandy Springs, GA
Completed: 2020



Client: Norfolk Department of Housing and Community Development
Location: Norfolk, VA
Completed: 2024



Client: Fargo-Moorhead Metropolitan Council of Governments
Location: Fargo, ND
Completed: 2023



Client: Town of Apex
Location: Apex, NC
Completed: 2023

existing multifamily stock as essential for economic development and recommended increasing multifamily and small-lot single-family production to mitigate displacement. The findings of this study were presented to the City Council in November 2020 to guide the City's housing strategy.

City of Norfolk Housing Needs Assessment and Plan

On behalf of the Norfolk Department of Housing and Community Development (NDHCD), HR&A completed a comprehensive housing needs assessment, developed a strategic plan and provided technical assistance on a range of local housing programs and priorities. For the needs assessment, HR&A analyzed local housing market trends and housing needs based on demographic and economic trends in Norfolk and the broader region and identified key issues that the City should focus on to drive more equitable housing outcomes. As a result of this analysis, HR&A worked with NDHCD to draft a [strategic housing plan](#), including building regional capacity, dedicating local funding to housing initiatives, investing in programs to strengthen neighborhoods, and doubling down on resources to help residents in high poverty areas move to areas of opportunity. HR&A also worked with the City to study the feasibility of an inclusionary zoning policy to help create affordable housing in high opportunity areas and designing a local affordable housing trust fund to sustainably deploy flexible funding for local housing.

Fargo-Moorhead Housing Needs Analysis and Strategies Report, Fargo, ND and Moorhead, MN

On behalf of the Fargo-Moorhead Metropolitan Council of Governments, HR&A led a [housing needs analysis](#) for the Fargo-Moorhead region, which includes Cass County, ND and Clay County, MN. HR&A analyzed regional and city-specific housing demand and needs driven by the rapid job and population growth seen in the region relative to housing production and preservation. The goal of the study was to understand the overall housing need as well as housing need by tenure, income, and specific populations within the region. HR&A then developed near- and long-term housing policies and strategies that the Fargo-Moorhead region and its cities can implement to support the development of housing and preservation of existing housing.

Town of Apex Housing Needs Assessment & Dashboard

The Town of Apex partnered with HR&A to create the [Apex Housing Data Dashboard](#), providing on-demand data on housing trends to the community and local policymakers. The interactive dashboard offers a housing needs assessment, comparisons with regional peers, and data trends over time through dynamic charts and maps. The dashboard presents information in an accessible, downloadable format, providing up-to-date insights for policymakers, the community, and Department staff, and includes links to additional local resources.



Client: Town of Auburn
Location: Auburn, ME
Completed: 2025

Auburn Regional Housing Production Needs Assessment

On behalf of the City of Auburn, Maine, HR&A provided local housing production targets and developed an interactive, digital report to illustrate the City's housing production needs. Building off of the regional housing production targets released in the State of Maine's Housing Production Study, HR&A estimated the local housing need by income and tenure. To estimate the local housing need, HR&A developed an allocation methodology specific to Auburn. The project team reviewed several regional housing need allocation (RHNA) methodologies from across the country in development of the Auburn methodology. HR&A utilized city-level data and stakeholder engagement to understand and analyze recent trends that likely impact current housing demand and projected future demand. After gathering feedback from City staff and Auburn's Housing Needs Assessment Committee, HR&A incorporated suggestions into a final, web-based report that presents the local allocation of housing production needs in an interactive format that can be updated annually. The final report provides the City of Auburn an in-depth understanding of production needs at the local level and will inform housing production policy going forward.



Client: City of Charlottesville
Location: Charlottesville, VA
Completed: 2022
Reference:

Charlottesville Upzoning Study

HR&A developed an Affordable Housing Plan for the City of Charlottesville centered around racial equity and regional collaboration to guide the City's investments in affordable housing programs and policies. HR&A engaged with multiple stakeholder groups including a steering committee to understand key challenges and areas of opportunity to support a comprehensive approach to housing affordability in Charlottesville, review potential housing tools, and refine proposed strategies. In March 2021, the City approved the Affordable Housing Plan with recommendations to amend the City's land use policies, dedicate funding for affordable housing programs, and pursue additional governance and policy changes to enhance racial equity and affordability in housing. Since the plan was adopted, HR&A has continued to work with the City and the comprehensive planning team to incorporate recommendations into the comprehensive plan and zoning rewrite and supported the development of an inclusionary zoning policy.



Client: City of Hayward
Location: Hayward, CA
Completed: 2021

City of Hayward Displacement Study

The City of Hayward engaged HR&A to assess the risk of displacement for residents under current housing market conditions in both the city and Alameda County, which saw the third-highest rent increases in the nation from 2014 to 2019. HR&A's analysis helped the city understand how displacement affected different neighborhoods, identify trends in rent and property value growth, and evaluate the demand for affordable and moderate-income housing. Using Census PUMS data, HR&A analyzed displacement impacts across various populations, including by race, immigration status, and age. The study informed the city's request for

Measure A1 funding from Alameda County and supported the development of its affordable housing funding strategy.



Client: Maryland-National Capital Park and Planning Commission
Location: Montgomery County, MD
Completed: 2020

Montgomery County Housing Needs Assessment

The Montgomery County Planning Department contracted with HR&A Advisors and LSA Associates to assess Montgomery County, Maryland's current and future housing needs in support of the County's Thrive Montgomery 2050 general plan update. HR&A completed a housing needs assessment, analyzing demographic, economic, and housing market conditions, both benchmarking the county to its regional context and examining intra-county submarket trends. The study then identified and quantified the county's housing needs, understood as not only the overall supply of housing required to accommodate county growth, but also the tenure, affordability, and types of housing required. A key output of the study was to draw a clear narrative around the nature, extent, and underlying drivers of the county's housing supply gap for different income levels. The findings of this study were presented to the Planning Board in early April 2020, and will be used to guide the County's comprehensive planning decisions.



Client: City of Stamford
Location: Stamford, CT
Completed: 2022

Stamford Affordable Housing Study

On behalf of the Stamford Land Use Bureau, HR&A created a Stamford Housing Affordability Plan to actively address the economic, environmental, and social equity impacts of Stamford's affordable housing needs. The city has experienced substantial growth, but growth in housing inventory has been unevenly distributed, placing disproportionate pressure on some neighborhoods. The plan includes a housing needs assessment, market analysis, and targeted regulatory and funding recommendations. HR&A facilitated community meetings and engaged a Community Advisory Committee and technical Steering Committee throughout the process. The study also assessed the inclusionary zoning program and recommended adjustments to fees and administration. HR&A advised on the new Housing Trust Fund, adding standards and oversight. In 2022, Stamford's plan received the highest score among 17 local housing plans assessed by FCCO.

Select Pennsylvania Experience



Client: The Pittsburgh Foundation
Location: Pittsburgh, PA
Completed: 2020

Organizational Strategy for Pittsburgh's Urban Redevelopment Authority

HR&A prepared an organizational strategy to enable the Urban Redevelopment Authority of Pittsburgh (URA) to more effectively plan and implement economic development initiatives for the City of Pittsburgh. Working with URA, City, and external stakeholders, HR&A assessed and diagnosed the URA's alignment with the City's economic development priorities through an online survey, a review of peer city precedents, an analysis of budget and funding, and an evaluation of the capacity of

partners in the metropolitan area. Based on this assessment, HR&A recommended changes for how both the URA and the City collaboratively plan, organize, and implement economic development initiatives for a more prosperous and inclusive City. This included recommendations and an implementation framework for the URA's organization and staffing, authorities and governance, partnerships, and budget to better achieve the city's economic development goals.



Client: Urban Redevelopment Authority of Pittsburgh (URA)
Location: Pittsburgh, PA
Completed: 2019

Program Design for Pittsburgh's Housing Opportunity Fund

On behalf of the Urban Redevelopment Authority of Pittsburgh, HR&A facilitated the launch of Pittsburgh's Housing Opportunity Fund, through which \$10 million in new public funding will be deployed each year to new and existing housing programs. HR&A first engaged the fund's advisory board, composed of local housing experts and advocates, to create an annual allocation plan that distributes the funding across programs with a purpose of achieving maximum impact and addressing the deepest housing needs. HR&A then drafted program guidelines and supporting documents—such as scoring criteria and narrative applications—across a variety of housing programs. The five programs funded and established in 2018 include a housing stabilization and short-term rental assistance program, a rental gap financing program for affordable multifamily developments, a loan program for homeowner rehabilitation projects, an acquisition-rehabilitation-resale program, and a down payment and closing cost assistance program.



Client: City of Philadelphia
Location: Philadelphia, PA
Completed: 2019

Philadelphia Poverty Reduction Study

On behalf of the City Council of Philadelphia, HR&A analyzed strategies to reduce the city's poverty rate. Though Philadelphia's real estate market has recovered since the recession and average household incomes have grown substantially, over 26% of residents are currently in poverty, the highest rate among the ten largest cities in the U.S. Furthermore, 37% of the city's children below the age of 18 live below the federal poverty line. HR&A helped the Council take a fresh look at the City's antipoverty strategy by generating a shortlist of the most effective policy interventions informed by conversations with national experts and tailored to local needs and economic conditions. Specifically, HR&A helped the Council assess ideas related to housing, workforce development, and increasing utilization of State- and City-provided benefits programs. HR&A also helped to prioritize these programs and establish a common framework for assessments of their effectiveness, and by so doing provided the Council with a framework to become a more effective advocate as the City and Mayor explore new antipoverty programs.



Client: Urban Redevelopment Authority of Pittsburgh (URA)
Location: Pittsburgh, PA
Completed: 2022

URA Implementation Roadmap and Housing Production Plan

On behalf of Pittsburgh's Urban Redevelopment Authority (URA), HR&A developed a multiyear Implementation Roadmap, to create a sustainable, mission-aligned plan for achieving URA's Organizational Strategy. First, HR&A crafted mission and vision collateral through conversations with the Executive Team, which will serve as a communication tool between URA stakeholders and partners. Based on the Organizational Strategy and mission & vision collateral, HR&A provided a framework to help the URA refine current processes to measure metrics of success at key stages in the life cycle of URA projects. The Plan included specific guidance for high priority operational reforms needed for proactive and strategic executive decision-making. HR&A outlined findings and implementation recommendations for each of the URA's departments in a detailed business plan.

As part of the Implementation Roadmap, HR&A also created a 10-year Housing Production Plan. HR&A prepared production scenario plans describing how the URA could focus the Housing Opportunity Fund and other funding sources to produce housing over the next ten years. To develop these scenarios, HR&A defined housing priorities and needs for the URA based on conversations with the URA's Executive Team and citywide housing needs. HR&A also reviewed and evaluated current housing programs at the URA and within the City of Pittsburgh. Based on this review, HR&A identified four potential program modifications to increase funding sources for URA housing programs, expand the supply of new and rehabilitated housing, and revise processes that increase program efficiency. These recommendations culminated in a final Housing Production Plan, which included target outputs and potential impact for housing programs, action steps to reach the potential impact, and case studies.



Client: Hazelwood Initiative
Location: Pittsburgh, PA
Completed: 2021

Hazelwood Initiative Strategic Plan

HR&A Advisors supported the Hazelwood Initiative, a community development corporation for the Greater Hazelwood neighborhood of Pittsburgh, to develop a five-year strategic plan to advance the Initiative's goals of preventing displacement, supporting the local community, and increasing residents' input in neighborhood planning. Greater Hazelwood has had a declining population and worsening economic and environmental conditions since the closure of steel mills in the area. Hazelwood Green, a 180-acre planned innovation district in the neighborhood, presents an opportunity for the area while also increasing the economic pressure that longtime residents in this low-income, high-renter neighborhood are already facing. In this context, the Hazelwood Initiative required assistance to formulate a vision to pursue its goal of "development without displacement." HR&A crafted a comprehensive five-year strategic plan that recommends establishing partnerships to develop permanently affordable housing and connect residents to services like emergency rental assistance; developing a leasing strategy to ensure that the Initiative's commercial spaces have tenants that meet community

needs; and creating open space to increase residents' quality of life. The strategic planning process was informed by stakeholder interviews that provided insight on the organization's current perceptions and role in the neighborhood as well as multiple workshops with the Initiative's board and staff to learn about their priorities and how they envision meeting the neighborhood's needs. Based on this engagement as well as case studies of similar mission-driven organizations, HR&A identified programmatic and capacity gaps that the Initiative must address to achieve its vision and recommended tactics for partnership, engagement, governance, operating structure, and real estate management to fill these gaps. HR&A's strategy also provides recommendations on tactic prioritization, staffing and budgeting, and target metrics to guide the Initiative's next years of work.



Client: City of Philadelphia
Location: Philadelphia, PA
Completed: 2019

Philadelphia Incentives Study

On behalf of the City of Philadelphia, HR&A is assessing the City's economic development toolkit and making recommendations for its approach to deploy incentives for business attraction and retention. As Philadelphia sees a resurgence of investment in the city's core, the administration seeks to understand the effectiveness of its incentive programs, align future deployment with broader public policy goals, and ensure that economic growth is felt citywide. To assess the efficacy of the City's current toolkit in meeting policy objectives, HR&A is conducting a detailed analysis of seven priority incentive programs, assessing relative costs and benefits to the City. HR&A is also benchmarking Philadelphia's incentive programs against peer cities to identify best practices. HR&A's work will culminate in a final report offering recommendations for the City's business incentive programs, to be issued this coming summer.



Client: City of Philadelphia
Location: Philadelphia, PA
Completed: 2022

Re-imagine Philadelphia: Comprehensive Planning for Racial Equity

On behalf of the Philadelphia City Planning Commission (PCPC), HR&A is developing a framework for the city's next comprehensive plan process using a lens of equity, particularly racial equity. HR&A designed, launched, and is currently facilitating a year-long Steering Committee process with representatives from across City government as well as community leaders, including those who work to represent disenfranchised communities. We are teaching members of the Steering Committee about the power of the Comprehensive Plan to improve quality of life and discussing issues of racial justice; looking with a critical eye at how planning and our cities have been shaped by systemic racism. Through this process, we will identify priorities that should be integrated into the next comprehensive plan, and work as a group to develop a public engagement strategy that listens to and understands the needs of a diverse range of residents. The resulting framework will be a blueprint for PCPC's future comprehensive plan update.

Project Understanding & Approach

Lower Merion Township seeks a forward-looking Housing Needs Assessment and Housing Action Plan that provides actionable insights and supports the Township's commitment to fostering a housing market that serves residents across all income levels and life stages. In response, HR&A Advisors proposes a comprehensive approach that fulfills the Township's goals while aligning with best practices, which will include:

- **A full demographic and housing market analysis**, with projections to understand current and future housing needs by tenure, income, and household type
- **An evaluation of the rental housing market**, including affordability, quality, and availability across key demographics such as seniors, veterans, young professionals, and households with disabilities
- **Assessment of Naturally Occurring Affordable Housing (NOAH)**, with a particular focus on preservation strategies and barriers, including case studies relevant to suburban communities
- **Review of aging housing stock**, identifying areas with the greatest potential for targeted reinvestment or redevelopment
- **Examination of zoning, infrastructure, and land use policies** that may impact housing development, and alignment opportunities with schools, transit, and services
- **Market analysis of development feasibility**, including for low-to-moderate income and workforce housing typologies
- **Recommendations for strategic partnerships and policy tools** to preserve, expand, and diversify the Township's housing supply over time

HR&A brings a distinct advantage to this project: we have already completed substantial housing market analysis for **Lower Merion Township through our proprietary [HousingWeaver](https://www.housingweaver.com) platform**. This allows us to dedicate more of the project budget to doing the tasks that impact Lower Merion Township and its residents the most—developing targeted recommendations and conducting deeper, thoughtful analysis on priority concerns like the preservation of naturally occurring affordable housing, construction of new affordable new affordable and workforce housing, and building the capacity of the Township's housing ecosystem.

Additionally, if the Township chooses, **this data and assessment of need can update annually**, making sure that this data is as up to date and relevant three years from now, as it is today.

We have provided sample housing needs assessments for Lower Merion Township and Montgomery County, PA. Should HR&A Advisors be chosen for this project, we will work with you to ensure that it meets all the needs of this scope of work.

Link to HousingWeaver's sample reports for Lower Merion Township

<https://www.housingweaver.com/merion>

We ask that you do not distribute these materials externally.

Scope of Services

Task 1: Housing Initiatives

HR&A will ensure that the Market Analysis and Housing Needs Assessment (HNA) are grounded in the broader planning framework of Lower Merion Township by building upon existing plans, policies, and analyses. Our approach will ensure that this analysis is additive, aligning with ongoing efforts while creating a solid foundation to inform the development of the Housing Action Plan.

1.1 – Kickoff Call

HR&A will lead a virtual kickoff meeting with the client to align goals, priorities, and project management processes for the Housing Needs Assessment. The meeting will cover:

- Project goals, scope and objectives
- Timeline, decisionmakers and decision-making processes
- Project management and communication protocols
- Roles and responsibilities of HR&A and the client team
- Local context: Key actors in the Lower Merion housing ecosystem
- Stakeholder engagement aspirations
- Available local data

HR&A will hold virtual check-ins with Lower Merion at an agreed upon cadence to track progress, provide updates, and address emerging issues.

1.2 – Existing Plans & Local Data Request

Current plans for housing and economic development, along with any recent studies and analyses conducted by Lower Merion Township staff, will serve as key starting points for the market and housing needs analysis (Task 2 & 3) and inform the development of the Housing Action Plan (Task 4). In consultation with the Township, HR&A will identify (up to 10 anticipated) relevant plans, studies and analyses for review to inform further analysis and strategy development. The selected plans could include active housing and economic development plans, such as the Five-Year Strategic Plan for Housing and Community Development (2020-2024) and the Comprehensive Plan Housing and Land Use Elements (2016), as well as regional or county-level documents such as the 2021-2040 Montgomery County Comprehensive Plan and the Delaware Valley Regional Planning Commission's Development Matters multifamily housing study. Additionally, HR&A will review recent studies, internal analyses or data that assess existing needs, identify gaps, or opportunities for alignment

Additionally, HR&A will prepare an initial data request detailing the local data needed to inform the Housing Action Plan, such as data on housing programs, recent investments, and affordable housing production and preservation.

2.1 – Review Past Housing Plans and Studies

HR&A's review of relevant plans, studies and analyses sourced in Task 1.2 will be guided by the following questions:

- How have housing needs, goals and strategies been communicated, and to whom?
- How much progress has been made toward current goals?
- What programming, policy, financing, land use, and zoning strategies have been utilized to address housing needs? Are there gaps or redundancies? How could strategies be better aligned?

- How do housing goals align with broader community investments in transportation, education, economic development and neighborhood revitalization? Where can these goals be better coordinated to maximize impact?
- Where are there gaps in the understanding of housing needs? What areas require deeper analysis?

2.2 – Inventory Existing Housing Tools

Building from knowledge gleaned from Task 2.1, HR&A will review Lower Merion Township's housing ecosystem and toolkit to develop an initial inventory of housing tools and establish a foundational understanding of the current policy environment and resource landscape. These tools and resources will include policies, programs, and key actors/agencies and their authorities available to address housing needs in the Township via local, state, federal and private channels – not only those administered by Lower Merion Township. This could also include tools, such as existing policies, that are negatively affecting housing in the Township. For example:

- **Existing policies** (county, municipal, state, federal) related to housing and homelessness (e.g., tenant protections, eviction policies, zoning and land use regulations, public land disposition, tax abatements).
- **Existing funding sources** available to Lower Merion Township (e.g., local, county, state and federal sources).
- **Existing housing programs** available to Lower Merion Township (e.g., downpayment assistance, housing vouchers, subsidy programs).
- **Key government and quasi-government actors** involved in housing and homelessness initiatives and their respective roles and authorities (e.g. authority to issue bonds, make loans).

HR&A will use publicly available resources and documents compiled by Lower Merion Township to develop this initial inventory.

To assess the alignment between existing efforts and housing needs, HR&A will classify programs and policies based on the primary housing challenges they address. The classification, developed in collaboration with Lower Merion Township, will likely include categories such as transitional housing, supportive housing, affordable homeownership, very low- and low-income rental housing, and workforce housing. This framework will help identify potential gaps in needs being served and support the development of consistent definitions for different types of affordable housing. For tools currently being utilized to address priority housing issues, HR&A will gather baseline program metrics via publicly available information and the client team to understand existing capacity and output. The assessment will be limited to data that is readily available.

Deliverables: *Data request, Draft list of documents for review, Baseline Housing Initiatives Report containing the information gathered in Task 1*

Task 2: Market Analysis

HR&A will conduct a comprehensive market analysis of Lower Merion Township's residential real estate landscape to evaluate current conditions and trends in both rental and ownership markets, development patterns, and the structural factors affecting housing supply and affordability. This analysis will provide critical context to inform the Housing Action Plan's recommendations.

2.1 – For-Sale Housing Market Analysis

HR&A will analyze residential real estate trends across all housing types in Lower Merion Township using five years of historical data, including:

- Sales prices by housing type, size, and location
- Average days on market
- Sales volume and inventory levels
- Price appreciation rates
- Market absorption rates by housing type

HR&A will conduct interviews with 3-5 realtors and mortgage lenders active in the Lower Merion market to supplement data analysis with qualitative insights on buyer preferences, market trends, challenges facing first-time homebuyers, and neighborhood-specific dynamics.

2.2 – Rental Housing Market Analysis

HR&A will analyze the rental housing landscape in Lower Merion Township, distinguishing units by type, number of bedrooms, size, and location. This analysis will include:

- Rent levels and trends by unit type and location
- Vacancy rates and rental absorption
- Rental housing stock by age and condition
- Comparison of Lower Merion rental rates to surrounding areas

2.3 – Housing Development Analysis

HR&A will analyze recent and planned residential development activity to understand:

- Volume, type, and location of new residential construction over the past five years
- Pipeline of approved and proposed housing developments
- Price points and target markets for new housing
- Comparison of development patterns within Lower Merion to countywide trends

2.4 – Development Constraints Analysis

HR&A will identify factors limiting housing production by analyzing regulatory, physical, and economic barriers to development. HR&A will interview 4-6 developers to understand:

- Regulatory barriers that limit housing development, including zoning and permitting processes
- Cost factors that impact project feasibility, including land costs and infrastructure requirements
- Market factors that influence development decisions
- Potential incentives or regulatory changes that would encourage housing development

2.5 – Market Forces Analysis

HR&A will analyze how broader market forces impact housing development and affordability in Lower Merion Township, including:

- Land availability and developable parcel analysis
- Construction and labor costs
- Utility and infrastructure capacity and costs
- Regional market dynamics affecting local development

2.6 – Housing Market Projections

Based on historical trends and current conditions, HR&A will develop ten-year projections for Lower Merion's housing market, including anticipated production by housing type, projected price changes, and identification of potential supply gaps.

Deliverables: *Market Analysis Report containing the information gathered in Task 2, including historical data, current market conditions, development constraints, and ten-year projections*

Task 3: Housing Needs Assessment

HR&A will conduct a comprehensive housing needs assessment for Lower Merion Township to evaluate the demographic, economic, and housing market trends shaping current and future housing needs. This analysis will leverage [HousingWeaver](#), HR&A's proprietary suite of interactive digital tools designed for advanced housing market and affordability analysis. HousingWeaver combines **dynamic charts, mapping, and narrative content** to present findings in an intuitive, interactive digital format. The digital report can also be exported as a PDF for easy sharing with internal and external partners.

3.1 – Housing Needs Assessment Analysis

HR&A will synthesize publicly available data, proprietary data (e.g., CoStar, Lightcast), and existing Township analysis **along with the information gathered through the market analysis** to assess housing needs and identify gaps in the supply of housing units across different income levels, household types, sizes, and tenures. The final product will not only outline current conditions but quantify the number and types of units needed to meet the Township's existing and future housing demand.

Our analysis will include:

- **Population Trends:** We will assess changes in population size, household composition, and age distribution, identifying demographic and racial disparities in housing outcomes. This will help project future household growth by type, size, and income level.
- **Economic Trends:** Evaluating employment shifts, industry changes, and job locations to determine where new housing is needed and what households can afford to pay for housing based on wages. Analysis will include employment by sector and wage levels to assess how housing affordability aligns with the economic makeup of the Township—particularly for knowledge workers, service workers, and other essential segments of the workforce.
- **Housing Supply & Affordability:** HR&A will evaluate the existing housing stock—both rental and owner-occupied—analyzing trends in cost, unit size, tenure, vacancy, housing age and condition, and neighborhood location.
- **Affordable Housing Supply:** We will inventory publicly subsidized and naturally occurring affordable housing (NOAH) and assess risks to affordability such as expiring affordability periods or redevelopment pressure. This analysis will be bolstered by local data provided by the Township.
- **Renter Housing Needs:** We will analyze renter affordability based on income distribution, cost-burden rates by income, race, and household type, and educational attainment. Our analysis will also assess trends in rents, vacancy rates, and the extent of the rental supply gap for different income and household size segments.
- **Homeowner Housing Needs:** We will examine homeownership rates and owner cost burdens disaggregated by income, race, and household type. The analysis will evaluate changes in home values over time, for-sale housing inventory, and affordability challenges for first-time homebuyers and moderate-income households.
- **Current & Future Gap Analysis -** Synthesizing the findings above to estimate the current and future shortfall or surplus of housing units in the Township, focusing on the gap between housing demand and supply across various income levels and housing types. The analysis will assess how current housing demand by Area Median Income (AMI) level aligns with available housing supply and project how this gap will change based on population and job growth forecasts. HR&A has a sophisticated methodology for breaking out State demographer population and job growth projections to understand the future housing needs by AMI and households type. This will include a breakdown by:
 - **Tenure** (rental and homeownership),
 - **Household income level** (using HUD-defined AMI bands),
 - **Household type and size** (e.g., seniors, families, single-person households),
 - **Number of bedrooms and unit type**, and

- **Price point and geographic location** in relation to access to jobs and services.

To ensure a robust and data-driven assessment, HR&A will utilize a combination of publicly available and proprietary data sources, including U.S. Census Bureau datasets such as the Population Estimates Program, American Community Survey, and Public-Use Microdata Sample, as well as data from the Internal Revenue Service and U.S. Bureau of Labor Statistics. Additionally, we will incorporate proprietary data from CoStar and Lightcast to provide deeper insights into market trends and employment patterns.

3.2 - Digital Report Annual Update (Optional)

The HousingWeaver Housing Needs Assessment digital report has the option of being connected to publicly available data APIs and kept perpetually up to date under a maintenance contract with HR&A. The benefit of this digital format is that a wide range of users can access, interact with, visualize and export the data to understand key housing and affordability trends on an ongoing basis, with publicly-available data and analysis updated as frequently as the underlying data sources. If Lower Merion Township does not select this optional task, the digital report provided by HR&A will be for data through 2025 only.

The analysis can be kept up to date with a maintenance fee of \$5,000 per year under a three-year contract. This does not include analysis of local data sources.

3.2 - Digital Report Add-Ons (Optional)

In addition to the Housing Needs Assessment, Lower Merion Township has the option of adding additional indicators and analysis to the HousingWeaver digital automated report. Additional analysis could include, but is not limited to:

- **Impact Tracker:** HR&A can integrate local data to measure Lower Merion Township's impact on housing production and affordability. Potential metrics include the number of homes funded through City programs (by AMI, tenure, geography, and funding source), total City investment in housing, leveraged

Deliverables: *Needs Assessment Report containing the information gathered in Task 3*

Task 4: Develop Recommendations and Implementation Strategies

4.1 – Define Housing Principles and Goals

Based on the findings from Tasks 1-3, HR&A will engage the Township to define up to 5 core goals that will serve as the north star for the Housing Action Plan. Housing Action Plans can encompass a wide range of policy priorities—including expanding homeownership access, preventing displacement, ending homelessness, improving housing quality, and increasing affordable rental supply. Narrowing in on a set of clear goals will help guide Lower Merion Township's prioritization of housing tools and development of an actionable housing strategy. The selected goals could include specific, measurable targets to enable the Township to monitor progress over time, and HR&A would estimate the impact of reaching the goals.

- Example goal: Help 2,000 Lower Merion Township renters earning under 80% of area median income become homeowners by 2030.
- Estimated impact: Achieving this goal would increase the Township's homeownership rate for this income band by x% percentage points, taking into account anticipated population changes.

These driving principles reflect the values and core beliefs that underly a strategy, serving as an important foundation for the housing action plan. HR&A will propose goals and any updates to principles and discuss with the Township in a **work session**, and will work with the client team to ensure all necessary stakeholders are involved in this goal setting conversation.

- The Township's feedback on goals and principles, which will inform final revisions, will be memorialized in writing in a single document within one week following the work session. This feedback will constitute a **decision point** and reflect all client perspectives that need to be included.

4.2 – Priority Housing Tools

Based on the housing needs and priorities identified in earlier tasks and HR&A's understanding of Lower Merion Township's existing housing ecosystem, HR&A will develop a preliminary list of recommended housing tools to address affordability challenges and expand housing choice. These tools will directly support the Township in increasing housing affordability, expanding housing opportunities for low- and moderate-income households, meeting workforce housing needs, and overcoming the structural impediments to development (identified in Task 2). Tools will primarily address the following areas:

- **Land Use and Development Regulations** – Strategies to reduce regulatory barriers and to facilitate diverse housing production such as, but not limited to:
 - By-right multifamily zoning in appropriate areas
 - “Soft density” strategies such as accessory dwelling units, duplexes, and small multifamily infill
 - Streamlining permitting and review processes to reduce cost and delay
- **Public Subsidy and Financing** – Evaluation of mechanisms to fund development and preservation of affordable and workforce housing, including:
 - Gap financing, tax incentives, and homeownership assistance programs
 - Public land disposition strategies
 - Relevant federal, state, local, and private funding sources—including programs and incentives available through the Pennsylvania Housing Finance Agency and other sources available to Pennsylvania municipalities to best leverage the township's \$700K housing fund.
- **Tenants' Rights and Anti-Displacement Strategies** – Approaches such as right-to-counsel programs, foreclosure prevention counseling, and preservation initiatives for naturally occurring affordable housing.

Each proposed strategy will be evaluated based on its feasibility within the Township's legal and fiscal context, its potential impact on affordability and access, and the partnerships required for effective implementation. These strategies will form the foundation for the implementation framework, which will clearly outline action steps, timelines, responsible entities, and performance metrics to help the Township track progress in meeting the community's housing needs.

4.3 - Recommendations

HR&A will work closely and iteratively with the client team to develop strategic recommendations to meet the housing goals, using the priority tools identified. This may include developing new tools or making changes to existing housing programs, policies, and investments to better align outputs with housing needs. For each recommendation, we will provide context illustrating the recommended policy change or investment, implementation needs and timing, key partners, anticipated impacts, and metrics to track success.

Deliverables: *Implementation framework identifying actions, indicators, timelines, and responsible organizations from information gathered in previous Tasks*

Task 5: Final Document and Presentation

Upon completion of the Housing Needs Assessment and Action Plan, HR&A will prepare a full package of final deliverables for Lower Merion Township. This will include a preliminary draft of the report for Township review and comment. After receiving consolidated feedback, HR&A will produce a visually compelling Final Report that incorporates any requested changes, along with a standalone Executive Summary that communicates key findings, goals, and recommended actions in a concise and accessible format.

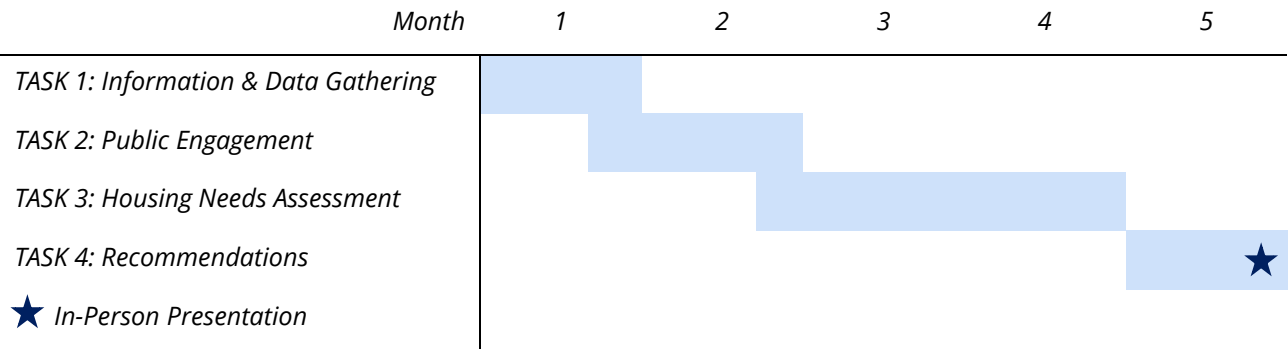
The Final Report package will include one (1) original, six (6) paper copies, and one (1) electronic copy of the Housing Needs Assessment and Action Plan, as well as one (1) paper copy and one (1) electronic copy of a PowerPoint presentation summarizing the report's findings and recommendations. In addition, HR&A will provide one (1) electronic copy of all GIS shapefiles, maps, and other supplementary data developed throughout the project.

HR&A will deliver one (1) final in-person presentation to the Township. The presentation will be designed for reuse by Township staff at future briefings with staff, elected officials, and community stakeholders to ensure the findings and recommendations are clearly communicated and widely understood.

Deliverables: *Draft deliverable for review and comment, final deliverable report and presentation, electronic copy of all GIS files, maps and other supplementary data*

Proposed Project Schedule

We anticipate that the project will take approximately 5 months to complete. HR&A is prepared to commence work with the kickoff meeting described in Task 1.1 within one week of receiving a signed contract.



Fee Proposal

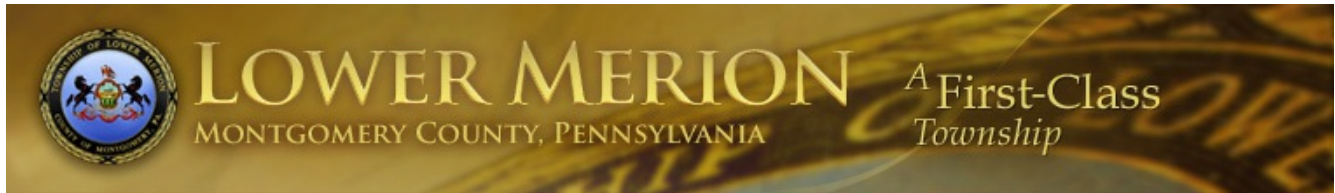
HR&A proposes completing all required tasks for this project for a total not-to-exceed (NTE) fee of \$65,000, inclusive of all fees and expenses. This amount accounts for all the anticipated costs associated with delivering the full scope of work outlined in this proposal, including two site visits, stakeholder engagement, materials, and any other reimbursable expenses. All travel will be billed at cost and is included in the NTE fee.

If the Township is interested in the optional tasks outlined in Tasks 3.9 (Digital Report Annual update) and/or Task 3.11 (Digital Report Add-On), HR&A can provide an updated total not-to-exceed (NTE) fee inclusive of those tasks.

We will invoice monthly based on the percentage of work completed to ensure transparency and alignment with project progress.

HR&A is prepared to begin work within one week of proposal approval, starting with the kickoff meeting outlined in Task 1.1.

INCLUDED TASKS	FEE
TASK 1: Housing Initiatives	\$5,000
TASK 2: Market Analysis	\$12,500
TASK 3: Housing Needs Assessment	\$12,500
TASK 4: Recommendations & Implementation <i>* Inclusive of travel for one (1) in-person presentation</i>	\$30,000
TOTAL	\$65,000
Optional Add-On Task	
Task 3.9: Digital Report Annual Update (3-Year Maintenance Contract)	\$5,000/year
Task 3.11: Digital Report Add-Ons	Varies



AGENDA ITEM INFORMATION

COMMITTEE: Public Works Committee

ITEM: RESOLUTION - AUTHORIZING EXECUTION OF A CONSENT ORDER REQUIRING THE UPDATE OF THE ACT 537 SEWAGE PLAN FOR GLADWYNE/VILLANOVA

Consider for adoption a resolution authorizing execution of a Consent Order prepared by the Pennsylvania Department of Environmental Protection (PADEP) requiring the Township to update its Act 537 Sewage Plan for the Gladwyne/Villanova section of the Township over a two-year period plus a more immediate plan to serve 1139 Club House Road with sewer service.

ATTACHMENTS:

Description	Type
<input type="checkbox"/> DEP Consent Order Sewer Planning	Issue Briefing
<input type="checkbox"/> Resolution - DEP 537 Consent Order	Resolution

TOWNSHIP OF LOWER MERION

Public Works Committee

Issue Briefing

Topic: Pennsylvania Department of Environmental Protection Consent Order - Sewer Planning

Prepared By: Ernie B. McNeely, Township Manager

Date: May 29, 2025

I. Action To Be Considered By The Board:

Adopt a resolution authorizing execution of a Consent Order prepared by the Pennsylvania Department of Environmental Protection (PADEP) requiring the Township to update its Act 537 Sewage Plan for the Gladwyne/Villanova section of the Township over a two-year period plus a more immediate plan to serve 1139 Club House Road with sewer service.

II. Why This Issue Requires Board Consideration:

The Board of Commissioners must authorize execution of a consent order issued by a state regulatory agency.

III. Current Policy or Practice (If Applicable): NA

IV. Other Relevant Background Information:

In 2023, the Township denied a private request to connect an unsewered residential property at 1139 Club House Road to public sewer due to no evidence of need. In 2024, the resident at 1139 Club House Road appealed that denial to PADEP in a petition supporting a public sewer extension for their property. In response to that petition, the PADEP issued an administrative order directing Lower Merion Township to complete the implementation of its Act 537 (Sewer Facilities) Plan. Specifically, the Township was instructed to engineer a plan to provide public sewer to all dwellings currently served by on-lot sewage disposal systems in the Gladwyne/Villanova section of the Township identified in the 5- and 10-year sewer service areas of the Act 537 Sewage Plan.

The PADEP order required that the Township complete the extensive planning process in an extremely short period of time of only a few months, by April 2025. The order also unreasonably required that the plan to be submitted show all of the sewers planned to be designed, permitted and constructed within a three-year timeframe.

The current Act 537 Plan was published in the early 1990's. It is a planning document to establish the Township's goals in the provision of adequate sanitary sewage service throughout the community as operationally feasible and in accordance with need and the Township's growth management strategy. The absence of wide-spread septic failures in the area included in the original PADEP Order indicates that planning and providing an engineered plan to expand public sewer service into those areas at this time is unwarranted. In addition, it would unduly place a significant financial burden on the Township and the hundreds of impacted private property owners who could be required to pay for the expansion of sewer service that they did not request.

In late 2024, the Township appealed the PADEP order to the Environmental Hearing Board pursuant to Section 4 of the Environmental Hearing Board Act. Prior to the appeal being heard and following discussion, a draft Consent Order and Agreement (copy attached) has been prepared that would replace the original untenable order and resolve the appeal.

The proposed Consent Order and Agreement would provide the Township with two years to update the Act 537 Plan for the Gladwyne/Villanova sections currently without public sewers to determine when and if sewer service will be needed, a timeline for installations as required plus a more immediate plan for sewer service just for 1139 Club House Road.

V. Impact On Township Finances:

The estimated cost of preparing the required plan over the next two years to address the unsewered areas of Gladwyne/Villanova included in the order is estimated to be in the range of \$85,000.

VI. Staff Recommendation:

Staff recommends the Board of Commissioners adopt the resolution authorizing execution of the Consent Order and Agreement with PADEP.

TOWNSHIP OF LOWER MERION

RESOLUTION NO. _____

**A RESOLUTION OF THE BOARD OF COMMISSIONERS OF
THE TOWNSHIP OF LOWER MERION APPROVING A
CONSENT ORDER AND AGREEMENT WITH THE
PENNSYLVANIA DEPARTMENT OF ENVIRONMENTAL
PROTECTION AND AUTHORIZING THE EXECUTION
THEREOF ON BEHALF OF THE TOWNSHIP**

WHEREAS, on October 25, 2024 the Commonwealth of Pennsylvania, Department of Environmental Protection (“Department”) issued an administrative order to the Township of Lower Merion (“Township”) requiring the Township to complete sewage facilities implementation planning to provide for the extension of public sewers to the existing, unsewered dwellings within the Gladwyne/Villanova 5- and 10-year sewer service areas (“Administrative Order”); and

WHEREAS, on November 21, 2024, the Township appealed the Administrative Order (“Appeal”) to the Environmental Hearing Board (“EHB”); and

WHEREAS, on January 16, 2025 the Township submitted to the Department a Plan of Study for the preparation of an Act 537 Official Plan Update, supplemented by a subsequent submission dated February 25, 2025 (“Special Study”); and

WHEREAS, the Department has determined that the Township’s implementation of the Special Study, on the schedule proposed in the Plan of Study, and in lieu of the schedule currently contained in the Administrative Order, is an appropriate next step for the Township to undertake to assure that there will be adequate sewer systems and treatment facilities to meet present and future needs within the Gladwyne/Villanova 5- and 10-year sewer service areas; and

WHEREAS, the Department and the Township have negotiated a Consent Order and Agreement, attached to this Resolution as Exhibit “A”, in order to resolve the issues raised by the Township in its Appeal; and

WHEREAS, the Board of Commissioners, having reviewed the Consent Order and Agreement, has determined that its provisions are in the best interest of the Township and of the residents and property owners within the Gladwyne/Villanova 5- and 10-year sewer service areas.

NOW THEREFORE, the Board of Commissioners of the Township of Lower Merion does hereby resolve as follows:

BE IT RESOLVED, that the Consent Order and Agreement attached hereto is hereby approved. The President of the Board and the Township Secretary are authorized to execute the same on behalf of the Township.

RESOLVED, this _____ day of _____, 2025.

BOARD OF COMMISSIONERS
TOWNSHIP OF LOWER MERION

BY: _____
Todd M. Sinai, President

ATTEST:

Jody L. Kelley, Secretary

EXHIBIT “A”

**COMMONWEALTH OF PENNSYLVANIA
DEPARTMENT OF ENVIRONMENTAL PROTECTION**

In The Matter Of:

The Township of Lower Merion : Implementation of Official Plan
 : Pennsylvania Sewage Facilities Act

CONSENT ORDER AND AGREEMENT

This Consent Order and Agreement is entered into this _____ day of _____
2025, by and between the Commonwealth of Pennsylvania, Department of Environmental
Protection (“Department”) and the Township of Lower Merion Township (“Township”).

The Department has found and determined the following:

A. The Department is the agency with the duty and authority to administer and
enforce the Pennsylvania Sewage Facilities Act, Act of January 24, 1966, P.L. (1965) 1535, *as
amended*, 35 P.S. §§ 750.1 et seq. (“Sewage Facilities Act” or “Act 537”); The Clean Streams
Law, Act of June 22, 1937, P.L. 1987, *as amended*, 35 P.S. §§ 691.1-691.1001 (“The Clean
Streams Law”); Section 1917-A of the Administrative Code of 1929, Act of April 9, 1929, P.L.
177, *as amended*, 71 P.S. § 510-17; and the rules and regulations (“rules and regulations”)
promulgated thereunder.

B. The Township is a municipality in Montgomery County organized and existing
under the laws of the Commonwealth of Pennsylvania, with an office address of 75 East
Lancaster Avenue, Ardmore, PA 19003-2323.

C. On July 20, 1993, the Department approved the *Lower Merion Township, Montgomery County, Pennsylvania Proposed Revisions to the County-Wide 537 Sewage Facilities Plan of 1972* (Plan). Because of this approval (“Plan Approval”) the Plan is the current Act 537 Official Sewage Facilities Plan for the Township.

D. The Plan Approval “provides for the extension of municipal sewer service to the Gladwyne/Villanova area ... as shown on exhibit XXII of the plan.”

E. The mapping referred to in the Plan Approval, titled *1992 Sewage Facilities Plan*, depicts the existing sewer areas of the Township as of 1992; the areas for which public sewer was slated to be provided within 5 and 10 years (i.e., 5-and 10-year service areas); and the areas to be served by onlot sewage disposal.

F. The Plan’s implementation schedule provided for the installation of public sewers for the 5-year service areas of the Township’s Gladwyne/Villanova area by 1997, and by 1999 for the 10-year service areas.

G. The Township’s decision to extend sewers to the 5- and 10-year service areas was based on the needs analysis (“Needs Analysis”) provided in the Gladwyne/Villanova Sewer Feasibility Study included with the Plan (“Feasibility Study”). The Feasibility Study also provided alternatives for sewer extensions to the service areas, including gravity and low-pressure options, and cost analyses for each alternative.

H. The Plan established a municipal capital improvements plan to fund the sewer extensions for the 5- and 10-year service areas.

I. On March 14, 2024, the Department was copied on a written demand to the Township from Ms. Margaret C. Tighe (“Requester”), the owner of a property identified as Tax

Map Parcel 40-00-11884-00-1, 1139 Club House Road (“Club House Road Property”), requesting that the Township implement the Plan by extending public sewer to the Club House Road Property.

J. The Club House Road Property is currently served by an individual onlot sewage disposal system, and public sewer is not available to the Club House Road Property.

K. According to the Plan, the Club House Road Property is located within the Club House Road neighborhood, one of the Gladwyne/Villanova 5-year service areas slated to receive public sewer by 1997.

L. On April 14, 2024, the Township provided its written refusal to the Requester’s demand that the Township implement the Plan by extending public sewers to the Club House Road Property.

M. On May 8, 2024, the Department received a written communication from the Requester, made pursuant to 35 Pa. Code §750.5(b) and 25 Pa. Code § 71.14, requesting that the Department order the Township to implement the Plan by extending public sewerage services to the Club House Road Property (“Private Request”).

N. On June 27, 2024, The Department received the Township’s June 26, 2024, response to the Private Request (“Response”).

O. The Department’s analysis of the sewer mapping provided with the Response is that the Township has extended public sewers to serve approximately 44 percent of the Gladwyne/Villanova areas designated as 5-year service areas in the Lower Merion Act 537 Plan, and 30 percent of the Gladwyne/Villanova areas designated as 10- year service areas.

P. As of the date of the Response, the Township had not provided additional Act 537 planning to reconsider or modify the 5- and 10-year service area designations, as prescribed by the Plan and as identified in the Needs Analysis, for the properties that remain unsewered.

Q. On October 25, 2024, the Department issued an administrative order to the Township requiring the Township to complete sewage facilities implementation planning to provide for the extension of public sewers to the existing, unsewered dwellings within the Gladwyne/Villanova 5- and 10-year sewer service areas, and specifically to the Club House Road neighborhood (“Administrative Order”).

R. On November 21, 2024, the Township appealed the Administrative Order to the Environmental Hearing Board (“EHB”). The Requester intervened on December 20, 2024. The matter is docketed at EHB Docket No. 2024-172-CS (“Appeal”).

S. On January 16, 2025, the Township submitted to the Department a Plan of Study for the preparation of an Act 537 Official Plan Update, titled *Gladwyne/Villanova Sewer Service Area Act 537 Update Revision “Special Study” Planning Activities Report*, as supplemented by a subsequent submission dated February 25, 2025 (“Special Study”).

T. The Plan of Study proposes the submission of a Special Study to reevaluate the need for, and feasibility of, extending public sewers to the Gladwyne/Villanova Sewer Service Area of Lower Merion Township

U. The Department has determined that the Township’s implementation of the Special Study, on the schedule proposed in the Plan of Study, and in lieu of the schedule currently contained in the Administrative Order, is an appropriate next step for the Township to undertake to assure that there will be adequate sewer systems and treatment facilities to meet

present and future needs within the Gladwyne/Villanova 5- and 10-year sewer service areas, in accordance with the Plan.

Applicable Law

V. Pursuant to Section 3 of the Sewage Facilities Act, 35 P.S. § 750.3, the Commonwealth of Pennsylvania has declared that its policy is “[t]o protect the public health, safety and welfare of its citizens through the development and implementation of plans for the sanitary disposal of sewage waste.”

W. The Sewage Facilities Act requires that “[e]ach municipality shall submit to the [D]epartment an officially adopted plan for sewage services for areas within its jurisdiction ... and shall from time to time submit revisions of such plan as may be required by rules and regulations... or by order of the [D]epartment.” 35 P.S. § 750.5(a).

X. Pursuant to 25 Pa. Code § 71.11, municipalities are required to develop and implement comprehensive official plans which provide for the resolution of existing sewage disposal problems, provide for the future sewage disposal needs of new land development and provide for the future sewage disposal needs of the municipality.

Y. Section 10 of the Sewage Facilities Act, 35 P.S. § 750.10, provides that the Department has the power to order municipalities to submit official plans and revisions thereto, and to order the implementation of official plans and revisions thereto.

Z. Section 5 of The Clean Streams Law, 35 P.S. § 691.5, provides that the Department has the power to issue such orders as may be necessary to implement the provisions of the Clean Streams Law or the rules and regulations of the Department.

AA. Section 203 of The Clean Streams Law, 35 P.S. § 691.203, provides the Department may issue appropriate orders to municipalities where such orders are found to be necessary to assure that there will be adequate sewer systems and treatment facilities to meet present and future needs or otherwise to meet the objectives of the Clean Streams Law.

ORDER

After full and complete negotiation of all matters set forth in this Consent Order and Agreement and upon mutual exchange of covenants contained herein, the parties desiring to avoid litigation and intending to be legally bound, it is hereby ORDERED by the Department and AGREED to by the Township as follows:

1. ***Authority.*** This Consent Order and Agreement is an Order of the Department authorized and issued pursuant to Section 10 of the Sewage Facilities Act, 35 P.S. § 750.10; Sections 5 and 203 of The Clean Streams Law, 35 P.S. §§ 691.5, 691.203; and Section 1917-A of the Administrative Code, 71 P.S. § 510-17.

2. ***Findings.***

a. In any matter or proceeding between the Township and the Department, the Township shall not challenge or deny the Department's assertion of the truth, accuracy, or validity of Paragraphs A through AA, above.

b. The parties do not authorize any other persons to use the findings in this Consent Order and Agreement in any matter or proceeding.

3. ***Corrective Action.***

A. Within 2 years of the execution of this Consent Order and Agreement, the Township shall submit complete sewage facilities implementation planning that will

provide for the extension of public sewers, where appropriate, to the existing, unsewered dwellings within the Gladwyne/Villanova 5- and 10-year sewer service areas, and specifically to the Club House Road neighborhood, as previously identified in the Plan. The implementation planning may be accomplished via a Special Study or a Component 3m planning module, and shall include the following:

1. The evaluation and selection of feasible alternatives to provide sewers to the 5-and 10-year service areas subject to any limitations properly placed on the Township under its zoning, subdivision or land development ordinances or by court orders.
2. A discussion of three (3) properties along Club House Road that were previously connected to public sewer (1201, 1207 and 1215 Club House Road), specifically, any municipal oversight of, and any sewage facilities planning and that was completed for, their connection to public sewers.
3. An implementation schedule of the major milestones for completion of the project, including design of the facilities, the submission of permits, and reasonable construction dates for completion of the selected alternatives.
4. The Special Study or Component 3m may evaluate the possibility of a phased approach to implementation.

B. As an alternative to the submission of a Component 3m to address the immediate needs of the Club House Road Property, the Township may submit a request

for a waiver from sewage facilities planning for the connection of the Club House Road Property to public sewer. If the Township elects to request a planning waiver for the Club House Road Property connection, it shall submit a Sewage facilities Planning Module Application Mailer to the Department within ninety (90) days of the execution of this Consent Order and Agreement. Any waiver request would be applicable to the Club House Road Property only. The waiver request must include sufficient documentation to provide for the connection of the Club House Road Property to public sewer, and no other properties would be permitted to connect to the sewage facilities proposed to serve the Club House Road Property pending the submission and approval of further planning for the area, such as by submission of a Component 3m addressing the Club House Road neighborhood more generally.

4. ***Submission of Documents.*** With regard to any document that the Township is required to submit pursuant to Paragraph 3, above, of this Consent Order and Agreement, the Department will review the document and will approve or disapprove the document, or any portion thereof, in writing. If the document, or any portion thereof, is disapproved by the Department, the Township shall submit a revised document to the Department that addresses the Department's concerns within sixty (60) days of such denial, or within a longer period of time, if provided by the Department in writing in a denial letter. Upon approval by the Department, the document, including any Department-approved implementation schedules, shall become a part of this Consent Order and Agreement for all purposes and shall be enforceable as such.

5. ***Stipulated Civil Penalties.***

a. In the event the Township fails to comply in a timely manner with any term or provisions of this Consent Order and Agreement, the Township shall be in violation of this Consent Order and Agreement and, in addition to all other applicable remedies, shall pay a civil penalty for each violation as follows:

i. For the first month of non-compliance, the Township shall make a payment to the “Commonwealth of Pennsylvania” in the amount of ONE HUNDRED DOLLARS (\$100.00) per day for each day of noncompliance with any milestone schedule date specified in Paragraph 3 of this Consent Order and Agreement;

ii For the second month of non-compliance, the Township shall make a payment to the “Commonwealth of Pennsylvania” in the amount of TWO HUNDRED FIFTY DOLLARS (\$250.00) per day for each day of noncompliance with any milestone schedule date specified in Paragraph 3 of this Consent Order and Agreement; and

iii For the third and subsequent months of non-compliance, the Township shall make a payment to the “Commonwealth of Pennsylvania” in the amount of THREE HUNDRED FIFTY DOLLARS (\$350.00) per day for each day of noncompliance with any milestone schedule date specified in Paragraph 3 of this Consent Order and Agreement.

b. Stipulated civil penalty payments shall be payable monthly on or before the fifteenth day of each succeeding month and shall be submitted in accordance with Paragraph 9 (Correspondence with the Department), below.

c. Any payment under this paragraph shall neither waive the Township's duty to meet its obligations under this Consent Order and Agreement nor preclude the Department from commencing an action to compel the Township's compliance with the terms and conditions of this Consent Order and Agreement. The payment resolves only the Township's liability for civil penalties arising from the violations of this Consent Order and Agreement for which the payment is made.

d. Stipulated civil penalties shall be due automatically and without notice.

6. ***Effect of Consent Order and Agreement.*** The Department, through this Consent Order and Agreement, approves the Plan of Study described in Paragraphs S through U, herein; and withdraws the Administrative Order described in Paragraph Q, herein, in favor of this Consent Order and Agreement.

7. ***Township's Withdrawal of Appeal.*** Upon signing this Consent Order and Agreement, the Township shall file with the EHB a praecipe of withdrawal of the Appeal described in Paragraph R, herein. This withdrawal shall be subject to the provisions of Paragraph 15, herein.

8. ***Additional Remedies.***

a. In the event the Township fails to comply with any provision of this Consent Order and Agreement, the Department may, in addition to the remedies prescribed herein, pursue any remedy available for a violation of an order of the Department, including an action for civil penalties or action to enforce this Consent Order and Agreement.

b. The remedies provided by this paragraph and Paragraph 5 (Stipulated Civil Penalties) are cumulative and the exercise of one does not preclude the exercise of any

other. The failure of the Department to pursue any remedy shall not be deemed to be a waiver of that remedy. The payment of a stipulated civil penalty, however, shall preclude any further assessment of civil penalties for the violation for which the stipulated penalty is paid.

9. ***Reservation of Rights.*** The Department reserves the right to require additional measures to achieve compliance with applicable law. The Township reserves the right to challenge any action which the Department may take to require those measures.

10. ***Liability of Operator.*** The Township shall be liable for any violations of the Consent Order and Agreement, including those caused by, contributed to, or allowed by its officers, agents, employees, or contractors. The Township also shall be liable for any violation of this Consent Order and Agreement caused by, contributed to, or allowed by its successors and assigns.

11. ***Correspondence with Department.*** All correspondence with the Department concerning this Consent Order and Agreement shall be addressed to:

Mr. Thomas Magge, Program Manager
Clean Water Program
Department of Environmental Protection
Southeast Regional Office
2 East Main Street
Norristown, PA 19401

Email: tmagge@pa.gov

with a copy sent to:

William H. Gelles, Esquire
Supervisory Counsel
Department of Environmental Protection
Office of Chief Counsel
Southeast Regional Office
2 East Main Street
Norristown, PA 19401

Email: wgelles@pa.gov

12. ***Correspondence with Township.*** All correspondence with the Township concerning this Consent Order and Agreement shall be addressed to:

Mr. Ernie B. McNeely
Manager
Lower Merion Township
75 E Lancaster Ave.
Ardmore, PA 19003-2323

Email:

with a copy sent to:

David J. Brooman, Esq.
High Swartz LLP
40 East Airy Street
Norristown, PA 19401

Email: dbrooman@highswartz.com

The Township shall notify the Department whenever there is a change in the contact person's name, title, or address. Lower Merion Township agrees that service of any notice, document, or any legal process for any purpose under this Consent Order and Agreement, including its enforcement, may be made electronically by email to the above email address or by mailing a copy by first class mail to the above address.

13. ***Severability.*** The paragraphs of this Consent Order and Agreement shall be severable and should any part hereof be declared invalid or unenforceable, the remainder shall continue in full force and effect between the parties.

14. ***Entire Agreement.*** This Consent Order and Agreement shall constitute the entire integrated agreement of the parties. No prior or contemporaneous communications or prior drafts shall be relevant or admissible for purposes of determining the meaning or extent of any provisions herein in any litigation or any other proceeding.

15. ***Attorney Fees.*** The parties shall bear their respective attorney fees, expenses and other costs in the prosecution or defense of this matter or any related matters, arising prior to execution of this Consent Order and Agreement.

16. ***Modifications.*** No changes, additions, modifications, or amendments of this Consent Order and Agreement shall be effective unless they are set out in writing and signed by the parties hereto.

17. ***Titles.*** A title used at the beginning of any paragraph of this Consent Order and Agreement may be used to aid in the construction of that paragraph but shall not be treated as controlling.

18. ***Decisions Under Consent Order.*** The Township waives its rights to appeal to the Environmental Hearing Board any decision that the Department makes under the provisions of this Consent Order and Agreement, including a notice that stipulated civil penalties are due, which rights may be available under Section 4 of the Environmental Hearing Board Act, the Act of July 13, 1988, P.L. 530, No. 1988-94, 35 P.S. § 7514; the Administrative Agency Law, 2 Pa. C.S. § 103(a) and Chapters 5A and 7A; or any other provision of law. The

Department agrees that any objection that the Township may have to any such decision may be raised as a defense in any Court where the Department enforces this Consent Order and Agreement.

19. ***Termination.*** The obligations of Paragraphs 3 through 5, herein shall terminate when the Department determines that Lower Merion Township has complied with the requirements of Paragraph 3 herein.

20. ***Execution of Agreement.*** This Consent Order and Agreement may be signed in counterparts, each of which shall be deemed to be an original and all of which together shall constitute one and the same instrument.

21. ***Resolution.*** Attached hereto as Appendix A is a resolution of the Board of Commissioners of the Township of Lower Merion authorizing its signatories below to enter into this Consent Order and Agreement on its behalf.

IN WITNESS WHEREOF, the parties hereto have caused this Consent Order and Agreement to be executed by their duly authorized representatives. The undersigned representatives of the Township certify under penalty of law, as provided by 18 Pa. C.S. § 4904, that they are authorized to execute this Consent Order and Agreement on behalf of the Township; that the Township consents to the entry of this Consent Order and Agreement as a final ORDER of the Department; and that the Township hereby knowingly waives its right to appeal this Consent Order and Agreement and to challenge its content or validity, which rights may be available under Section 4 of the Environmental Hearing Board Act, Act of July 13, 1988, P.L. 530, 35 P.S. § 7514; the Administrative Agency Law, 2 Pa. C.S. § 103(a) and Chapters 5A

and 7A; or any other provisions of law. Signature by the Township's attorney certifies only that the agreement has been signed after consulting with counsel.

FOR THE TOWNSHIP OF LOWER MERION

FOR THE COMMONWEALTH OF
PENNSYLVANIA, DEPARTMENT OF
ENVIRONMENTAL PROTECTION:

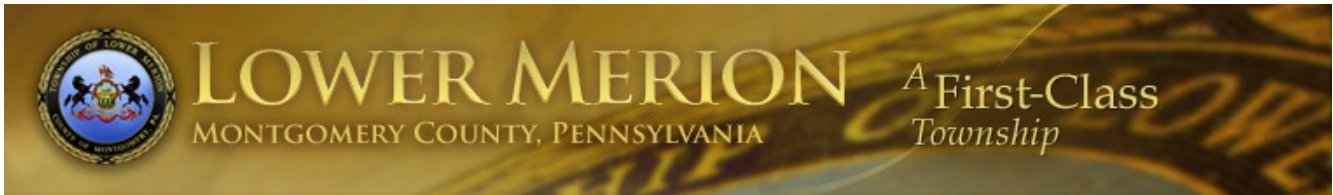
Name
Title

Thomas Magge
Regional Manager
Clean Water

Name
Title

Name
Attorney

William Gelles
Supervisory Counsel



AGENDA ITEM INFORMATION

COMMITTEE: Police Committee

ITEM: ADOPTION OF ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC -
REGULATION OF ELECTRIC VEHICLE CHARGING STATIONS ON MUNICIPAL LOT 7

An Ordinance to amend the Code of the Township of Lower Merion, Chapter 145 thereof, entitled Vehicles And Traffic, Article XV, Schedules, § 145-119, Schedule XIX: “Special Purpose Parking Zones”, by limiting parking at signed charging stations on Municipal Lot 7 to electric vehicles only while charging.

This Ordinance was authorized for advertisement at a stated meeting of the Board of Commissioners held May 21, 2025 and duly advertised in the June 8, 2025 edition of the Main Line Times & Suburban.

ATTACHMENTS:

Description	Type
<input type="checkbox"/> Proposed Ordinance - Lot #7 Electric Vehicle Charging Stations	Ordinance

AN ORDINANCE

NO. _____

AN ORDINANCE To Amend The Code Of The Township Of Lower Merion, Chapter 145 Thereof, Entitled Vehicles And Traffic, Article XV, Schedules, § 145-119, Schedule XIX: “Special Purpose Parking Zones”, By Limiting Parking At Signed Charging Stations On Municipal Lot 7 To Electric Vehicles Only While Charging.

Section 1. The Code of the Township of Lower Merion, Chapter 145, entitled Vehicles and Traffic, Article XV, Schedules, §145-119, Schedule XIX: Special Purpose Parking Zones, is hereby amended by adding thereto in alphabetical order the following regulations:

§145-119. Schedule XIX: Special Purpose Parking Zones

<u>Name of Highway</u>	<u>Side</u>	<u>Authorized Purpose or Vehicle</u>	<u>Location</u>
Municipal Lot 7, 7 North Bryn Mawr Avenue, Bryn Mawr	Northwest corner of Lot 7	Parking for electric vehicles only while charging at Township Charging Stations	Municipal Parking Lot 7, Bryn Mawr, NW Corner at Signed Charging Stations

Section 2. Nothing in this Ordinance or in Chapter 145 of the Code of the Township of Lower Merion, as hereby amended, shall be construed to affect any suit or proceeding in any Court, any rights acquired or liability incurred, any permit issued, or any cause or causes of action existing under the said Chapter 145 prior to the adoption of this amendment.

Section 3. The provisions of this Ordinance are severable, and if any section, sentence, clause, part, or provision thereof shall be held illegal, invalid, or unconstitutional by any Court of competent jurisdiction, such decision of the court shall not affect or impair the remaining sections, sentences, clauses, parts, or provisions of this Ordinance. It is hereby declared to be the intent of the Board that this Ordinance would have been adopted as if such illegal, invalid, or unconstitutional section, sentence, clause, part, or provision had not been included herein.

Section 4 This Ordinance shall take effect and be in force from and after its approval as required by law.

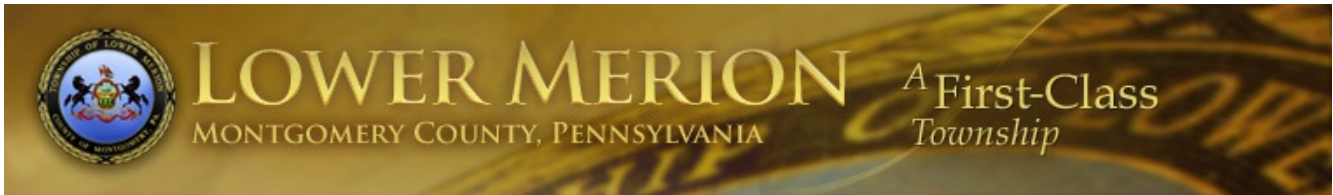
Approved by the Board this day of , 2025.

BOARD OF COMMISSIONERS OF THE
TOWNSHIP OF LOWER MERION

ATTEST:

Todd M. Sinai, President

Jody L. Kelley, Secretary



AGENDA ITEM INFORMATION

COMMITTEE: Police Committee

ITEM: ADOPTION OF ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC -
REGULATION OF IMMOBILIZATION DEVICES

An Ordinance to amend the Code of the Township of Lower Merion, Chapter 145 thereof, entitled Vehicles And Traffic, Article XI, Immobilization, Towing, Impoundment And Storage, to provide definitions for Barnacle, Immobilizing Service And Person; and to provide regulations regarding the licensing of immobilizing services, the requirements for the implementation of immobilizing practices, and a maximum immobilizing fee that may be charged.

This Ordinance was authorized for advertisement at a stated meeting of the Board of Commissioners held May 21, 2025 and duly advertised in the June 8, 2025 edition of the Main Line Times & Suburban.

ATTACHMENTS:

Description	Type
□ Proposed Ordinance - Immobilization Devices	Ordinance

AN ORDINANCE

NO. _____

An Ordinance To Amend The Code Of The Township Of Lower Merion, Chapter 145 Thereof, Entitled Vehicles And Traffic, Article XI, Immobilization, Towing, Impoundment And Storage, To Provide Definitions For Barnacle, Immobilizing Service And Person; And To Provide Regulations Regarding The Licensing Of Immobilizing Services, The Requirements For The Implementation Of Immobilizing Practices, And A Maximum Immobilizing Fee That May Be Charged.

The Board of Commissioners of the Township of Lower Merion, does hereby ordain as follows:

Section 1. The Code of the Township of Lower Merion, Chapter 145, entitled Vehicles and Traffic, Article XI, Immobilization, Towing, Impoundment and Storage, Section 145-69.1, Definitions is hereby amended by the addition, in alphabetical order of definitions for Barnacle, Immobilizing Service, and Person, to provide as follows:

BARNACLE - A vehicle immobilizing device that adheres to the windshield of a motor vehicle to prevent or obscure the driver's visibility.

IMMOBILIZING SERVICE - a person who immobilizes motor vehicles on private property with the consent of the property owner.

PERSON - Any natural person, association, partnership, firm or corporation.

Section 2. The Code of the Township of Lower Merion, Chapter 145, entitled Vehicles and Traffic, Article XI, Immobilization, Towing, Impoundment and Storage, is hereby amended by the addition of a new Section 145-75.1, Immobilizing unattended vehicles on private property, to provide as follows:

145-75.1 Immobilizing unattended vehicles on private property

The following regulations shall apply to the immobilization of vehicles parked or left unattended on private property without the consent of the property owner:

- A. No person except the private property owner or an immobilizing service authorized by the property owner may immobilize a vehicle parked or left unattended on private property, and, in addition:

- (1) When a vehicle is immobilized, the means to release the immobilizing device must be made immediately available to the vehicle operator, an immobilization fee of no more than the flat rate of \$85 may be charged and the vehicle must be immediately released upon payment.
 - (2) The availability to pay the immobilization fee by cash, credit card (AMEX, Mastercard, Visa or Discover), debit card, or direct bank withdrawal (Venmo or Zelle) must be offered, in default of which the vehicle must be immediately released without payment.
- B. If the owner of a property authorizes an immobilizing service to immobilize vehicles parked or left unattended on the property, the following shall apply:
- (1) An immobilizing service may not operate in the Township unless a license therefore has been issued by the Township authorizing them to do so. The license shall be issued for a fee as provided in Chapter A167, Fees, shall be renewed annually and shall be issued by the Lower Merion Township Police Department upon completion of a Department application form containing, as a minimum, the following information:
 - (a) The name and address of the immobilizing service.
 - (b) The name and business address of all persons or entities having an ownership interest in the immobilizing service.
 - (c) The name and address of all persons from whose property in Lower Merion Township the immobilizing service is authorized to immobilize vehicles together with a true and correct copy of each and every contract between the applicant and such persons.
 - (d) Copy of a currently issued bond with corporate surety in the sum of \$10,000 in favor of the Township and in form satisfactory to the Township Solicitor, conditioned upon the faithful performance and discharge by the immobilizing service of its duties hereunder and providing indemnification to the owners of immobilized vehicles against loss, injury or damage while in his custody.
 - (e) The name of the bonding company and the name and address of the bonding company agent through whom the bond required by this section has been issued.
 - (f) Certificates of insurance as follows: in the minimal amount of \$500,000 combined single limit for any auto, hired autos, non-owned autos; \$100,000 for each personal injury; and garage-keepers' liability in the amount of \$50,000 per occurrence.

(2) Authorized immobilizing services shall:

- (a) Make payment of any final judgment for personal injuries, property damage or excess charges rendered with respect to the performance of services regulated by this article.
- (b) Notify the Lower Merion Township Police Department of the immobilization of a vehicle on private property within two hours of such immobilization, regardless of the length of time the immobilization device was in place, and provide a description and license number of the vehicle thus immobilized.
- (c) Provide the Lower Merion Township Police Department with a true and correct copy of each and every contract executed between the applicant and another after an immobilizing license was issued with respect to the immobilization of vehicles on private property within the Township.
- (d) Display the name of the immobilization service or the person operating it, together with a valid phone number therefor, by signs on both sides of any service vehicle used in an act of immobilization.

(3) The Superintendent of Police, upon determining that any provision of this section has been violated, and in addition to any other penalties provided herein, may revoke a license issued hereunder together with the right to reapply for a subsequent license, for a period of up to two years. Appeal from such revocation shall be to the Police Committee of the Board of Commissioners.

C. Signs on private lots. No person shall immobilize or cause to be immobilized a vehicle parked without authorization on a private lot unless signs are posted as follows:

- (1) A sign, at least three feet by two feet in size, shall be placed at every entrance to a private lot clearly indicating that the parking lot is private, that unauthorized vehicles will be immobilized at the owner's expense, the name and phone number of the immobilizing service, and the amount of the immobilizing fee. No additional fees beyond the posted immobilizing fee may be charged.
- (2) That within every private lot additional signs at least 18 inches by 12 inches in size are to be posted approximately eight feet above ground level, clearly indicating that all unauthorized vehicles may be immobilized at the owner's expense. Such signs shall be placed and thereafter maintained to be readily visible to operators from all directions as follows:
 - (a) One sign shall be posted for every four parking spaces, or alternatively;

- (b) Signs shall be posed pursuant to a site plan prepared by the owner and approved by the Superintendent of Police, or his designee. Thereafter the Police Department will inspect private lots for which a license has been issued to an immobilizing service to ensure that they are in compliance with signage regulations.

Section 3. Nothing in this Ordinance or in Chapter 145 of the Code of the Township of Lower Merion, as hereby amended, shall be construed to affect any suit or proceeding in any Court, any rights acquired or liability incurred, any permit issued, or any cause or causes of action existing under the said Chapter 145 prior to the adoption of this amendment.

Section 4. The provisions of this Ordinance are severable, and if any section, sentence, clause, part, or provision thereof shall be held illegal, invalid, or unconstitutional by any Court of competent jurisdiction, such decision of the court shall not affect or impair the remaining sections, sentences, clauses, parts, or provisions of this Ordinance. It is hereby declared to be the intent of the Board that this Ordinance would have been adopted as if such illegal, invalid, or unconstitutional section, sentence, clause, part, or provision had not been included herein.

Section 5. This Ordinance shall take effect and be in force from and after its approval as required by law.

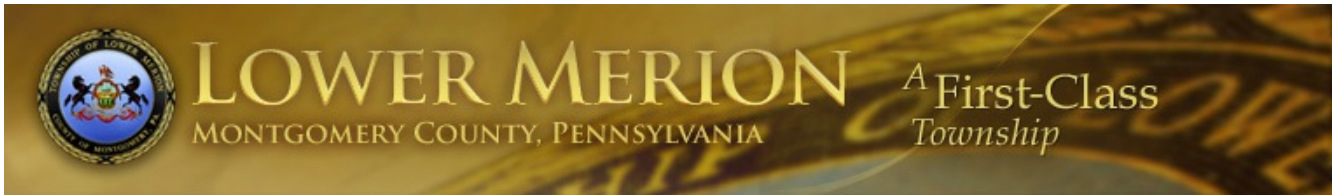
Approved by the Board this day of , 2025.

BOARD OF COMMISSIONERS OF THE
TOWNSHIP OF LOWER MERION

Todd M. Sinai, President

ATTEST:

Jody L. Kelley, Secretary



AGENDA ITEM INFORMATION

COMMITTEE: Police Committee

ITEM: ADOPTION OF ORDINANCE - CHAPTER 145, VEHICLES AND TRAFFIC - POLICE TOWING FEES

An Ordinance to amend the Code of the Township of Lower Merion, Chapter 145 thereof, entitled Vehicles And Traffic, Article XI, Immobilization, Towing, Impoundment And Storage, to increase the charge for a towed removal from a premises at the request of the Police from \$125 to \$200; to increase the 24 hour storage charge for vehicles thus removed from \$45 to \$65 for each full 24 hour period that the vehicle has been in storage; and to charge a \$100 administrative fee for services in processing the storage and release of an impounded vehicle.

This Ordinance was authorized for advertisement at a stated meeting of the Board of Commissioners held May 21, 2025 and duly advertised in the June 8, 2025 edition of the Main Line Times & Suburban.

ATTACHMENTS:

Description	Type
<input type="checkbox"/> Proposed Ordinance - Police Towing Amendments	Ordinance

AN ORDINANCE

NO. _____

An Ordinance To Amend The Code Of The Township Of Lower Merion, Chapter 145 Thereof, Entitled Vehicles And Traffic, Article XI, Immobilization, Towing, Impoundment And Storage, To Increase The Charge For A Towed Removal From A Premises At The Request Of The Police From \$125 To \$200; To Increase The 24 Hour Storage Charge For Vehicles Thus Removed From \$45 To \$65 For Each Full 24 Hour Period That The Vehicle Has Been In Storage; And To Charge A \$100 Administrative Fee For Services In Processing The Storage And Release Of An Impounded Vehicle.

The Board of Commissioners of the Township of Lower Merion, does hereby ordain as follows:

Section 1. The Code of the Township of Lower Merion, Chapter 145, entitled Vehicles and Traffic, Article XI, Immobilization, Towing, Impoundment and Storage, Section 145-71, Towing costs; hooking fees, Sub-section (A) thereof, Police Towing services, is hereby amended to provide as follows:

Article XI, Immobilization, Towing, Impoundment and Storage,

§145-71 Towing costs; hooking fees.

- A. Police towing services. The costs for towing services ordered by the Police Department for passenger cars and trucks with a gross vehicle weight of 10,000 pounds or less, to be paid and received by any authorized towing service or approved poundkeeper, shall be due upon a vehicle being hooked and removed from the premises and shall not be in excess of the flat rate of \$200.

* * * * *

Section 2. The Code of the Township of Lower Merion, Chapter 145, entitled Vehicles and Traffic, Article XI, Immobilization, Towing, Impoundment and Storage, Section 145-71, Towing costs; hooking fees, Sub-section (A) thereof, Police Towing services, is hereby amended to provide as follows:

Article XI, Immobilization, Towing, Impoundment and Storage,

§ 145-72 Storage costs.

The cost of storage of any passenger car or truck with a gross vehicle weight of 10,000 pounds registered gross vehicle weight (RGVW) or less, to be paid to and received by any poundkeeper, when impounded at the direction of the Police Department, shall be at the rate of \$65 per each full twenty-four-hour period commencing when the vehicle is actually placed into storage. (For example: A vehicle placed in storage at 11:00 p.m. would be charged one-day storage, provided the vehicle remained in storage for a full twenty-four-hour period ending at 11:00 p.m. the following night, and would be charged an additional one-day storage for each full twenty-four-hour period it remained in storage thereafter.) The poundkeeper is authorized to charge an administrative fee of \$100 for services in processing the storage and release of an impounded vehicle.

Section 3. Nothing in this Ordinance or in Chapter 145 of the Code of the Township of Lower Merion, as hereby amended, shall be construed to affect any suit or proceeding in any Court, any rights acquired or liability incurred, any permit issued, or any cause or causes of action existing under the said Chapter 145 prior to the adoption of this amendment.

Section 4. The provisions of this Ordinance are severable, and if any section, sentence, clause, part, or provision thereof shall be held illegal, invalid, or unconstitutional by any Court of competent jurisdiction, such decision of the court shall not affect or impair the remaining sections, sentences, clauses, parts, or provisions of this Ordinance. It is hereby declared to be the intent of the Board that this Ordinance would have been adopted as if such illegal, invalid, or unconstitutional section, sentence, clause, part, or provision had not been included herein.

Section 5. This Ordinance shall take effect and be in force from and after its approval as required by law.

Approved by the Board this day of , 2025.

BOARD OF COMMISSIONERS OF THE
TOWNSHIP OF LOWER MERION

Todd M. Sinai, President

ATTEST:

Jody L. Kelley, Secretary