

COMMUNITY IMPACT STATEMENT

**ILLG PROPERTY
PROPOSED REZONING TO THE
I-U-A AND I-U-B AGE-RESTRICTED RESIDENTIAL DISTRICTS
Warrington Township, Bucks County, PA**

Prepared For

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Table of Contents

Summary.....	1
Introduction.....	1
Characteristics of Proposal vs Existing Plan.....	2
Fiscal Impact (Summary).....	2
School Enrollment Impacts.....	2
Other Age-Restricted Communities.....	3
Figure AR-1 Fiscal Impact Analysis..... <i>Proposed Age-Restricted - Warrington Township</i>	4
Figure AR-2 Fiscal Impact Analysis..... <i>Proposed Age-Restricted - Central Bucks Schools</i>	5
Figure SS-1 Fiscal Impact Analysis..... <i>Standard Single Family - Warrington Township</i>	6
Figure SS-2 Fiscal Impact Analysis..... <i>Standard Single Family - Central Bucks Schools</i>	7
Figure R-1 Schools Residential Impact Assumptions.....	8
Figure SE-1 School Enrollment Impacts.....	9
Figure ES-1 Elementary Schools Enrollment (by grade).....	11
Attachments	
Aerial Photo looking Northwest from County Line Road	
Future Land Use Plan	

Illg Rezoning

1. Summary

- a. Rezoning of the 74.9 acre Illg Property to I-U-A and I-U-B (Age-restricted residential) is in conformance with the Future Land Use Plan of the Warrington Township Comprehensive Plan Update (2006)
- b. Estimated Annual Fiscal Impact:
 - The proposed zoning will yield net positive revenue impact to the Township of \$243,378 - or approximately \$181,000 greater than if developed pursuant to the existing zoning.
 - The proposed zoning will yield net positive revenue impact to the Central Bucks School District of \$1,985,795 - or approximately \$2 million greater than if developed pursuant to the existing zoning.
- c. Central Bucks South High School and Tamanend Middle School have only minimal excess capacity if Illg were developed under existing zoning along with the 160 single family lots (consisting of Blichasz 44 lots and Warrington Glen 116 lots) already approved and under construction, i.e.: 94.5% and 89.5% of capacity respectively would be used.
- d. Mill Creek Elementary currently has all grades enrolled above the minimum suggested (K thru 6) class size "policy range"* and if Illg were developed under existing zoning along with the 160 single family lots already approved and under construction, then the following schedule represents the number of projected students per class per grade related to the maximum established size based on the policy range*:
 - K 23.8 of 24 max.
 - 1 26.2 of 28 max.
 - 2 27.0 of 28 max.
 - 3 29.0 of 28 max.
 - 4 31.0 of 30 max.
 - 5 28.6 of 30 max.
 - 6 29.1 of 30 max.

2. Introduction

- a. Size of tract -74.9 acres, existing zoning - RA - Residential Agricultural, 95 sfd lots w/ existing proposed plan
- b. Proposed zoning (with maximum numbers of dwelling units contemplated - actual ultimate number of dwelling units subject to final land development plan approval and compliance with controlling Township Ordinances and requisite permitting). Total number of proposed units shall not exceed the following:
 - I-U-A (Age restricted single family attached - 113 d.u.)
 - I-U-B (Age restricted single family attached - 197 d.u.)
- c. Location strategy
 - I-U-A - positioned adjacent to Lower Nike Park, next area south used as single family
 - I-U-B - positioned adjacent to I-U-A (above), next and north used as Lamplighter Village - also an age-restricted community.

* See attached chart

Illg Rezoning

- d. Comprehensive Plan update (2006) - see attached exhibit
 - Illg property identified as Residential Single Family
 - Proposal is consistent with recommended uses of the Future Land Use Plan
 - Note that the Zoning Ordinance defines townhouse as Single Family attached

3. Characteristics of Proposal vs. Existing Plan

- a. Similar characteristics

<ul style="list-style-type: none"> • Proposed <li style="padding-left: 20px;">Use- Single Family <li style="padding-left: 20px;">Tenure - for sale (owner occupied) 	<ul style="list-style-type: none"> • Existing <li style="padding-left: 20px;">Use- Single Family <li style="padding-left: 20px;">Tenure - for sale (owner occupied)
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- b. Differing characteristics

<ul style="list-style-type: none"> • Proposed <li style="padding-left: 20px;">Occupancy - Age-Restricted <li style="padding-left: 20px;">Streets and Stormwater basins (maintained by Homeowners Association) <li style="padding-left: 20px;">Estimated Public School Children - 0 	<ul style="list-style-type: none"> • Existing <li style="padding-left: 20px;">Occupancy - Market Rate <li style="padding-left: 20px;">Streets and Stormwater basins (offered for dedication to Warrington Township) <li style="padding-left: 20px;">Estimated Public School Children - 90
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4. Fiscal Impact - See figures which follow for Details

- a. Township Revenues

<ul style="list-style-type: none"> • Proposed: \$425,464 	<ul style="list-style-type: none"> • Existing: \$171,079
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- b. Township Impact - Revenues after costs

<ul style="list-style-type: none"> • Proposed: \$243,328 	<ul style="list-style-type: none"> • Existing: \$62,384
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- c. School Impact

<ul style="list-style-type: none"> • Proposed: \$1,985,795 surplus 	<ul style="list-style-type: none"> • Existing: (\$92,632) deficit
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5. School Enrollment Impacts

- a. The purpose of this section is to evaluate the impact of estimated future school enrollment from Warrington Glen and Blichasz Developments (160 residential lots) and Illg if developed as 95 market rate single family homes.

- b. See attached figure: Schools Residential Impact Assumptions. It is estimated that a total of 242 public school students will result in the following impact on the three Central Bucks Schools serving this area of Warrington Township

	<u>Estimated Percent of Capacity with New Enrollment Added</u>
• Mill Creek Elementary	94.5%
• Tamanend	89.5%
• Central Bucks South	96.0%

- c. Focus on Elementary Grades K thru 6. See attached study.
 - The class sizes will exceed the maximum recommended policy range size
 - All other class sizes will be 93% or greater of the recommended policy range size

Illg Rezoning

6. Other Age-Restricted Communities in Warrington Township

a. Listed below are the existing Age-Restricted Communities situated in Warrington Township, with Zoning designation, number of units and completion status.

- Legacy Oaks (Zoned I-U-A), 218 Single-family detached (complete)
- Lamplighter Village I (Zones I-U-A), 149 Single-family attached (complete)
- Lamplighter Village II (Zoned I-U-A), 106 Single-family detached (complete)
- Forrest Ridge (Zoned I-U- B), 132 Multi-family (complete)
- Valley Square (Zoned CBD)*, 160 Multi-family built out of 200 approved
* but developed pursuant to I-U-B Standards

b. All non-multi-family communities are 100% complete. In total, only 40 of all age-restricted dwelling units approved remain to be built.

- Total number of dwelling units in age-restricted communities complete and occupied: 95%
(765÷805 = .95)

Figure: AR-1 Fiscal Impact Analysis

Proposed Age Restricted Development - Warrington Township		
1. Proposed IU-A Community		
a. 113 du @ \$415,000 each ⁽¹⁾		\$46,895,000.00
b. times tax equalization rate of 11.3%		\$5,299,135.00
c. Township millage rate of 11.55 mills (b x c)		\$61,205.01
d. Annual EIT collected 113 x \$124,000 x .5%		\$70,060.00
e. Transfer tax: 113 x \$415,000 x .5%/8 ⁽¹⁾		\$29,309.38
2. Proposed IU-B Community		
a. 197 du @\$392,000 each ⁽¹⁾		\$77,224,000.00
b. times tax equalization rate of 11.3%		\$8,726,312.00
c. Township millage rate of 11.55 mills		\$100,788.90
d. Annual EIT collected: 197 x \$117,600 x .5%		\$115,836.00
e. Transfer Tax/year: 197 x \$392,000 x .5%/8 ⁽²⁾		\$48,265.00
3. Proposed IU-A and IU-B impact on Township		
a. Total Revenue from 1 and 2 above		\$425,464.29
b. Total Cost - use per capita multiplier (558 x \$326.41) ⁽³⁾		\$182,136.78
c. Net Revenue after costs		\$243,327.51
d. Savings from having Private Streets ⁽⁴⁾ vs Public Streets		\$33,000.00
e. Annual Estimated Surplus		\$276,327.51

- (1) Unit Sale Price reflects present day project sale price based on current economic conditions.
- (2) Assume average resale once in eight years.
- (3) Township Services - cost calculated based on per capital multiplier and cost of municipal roads: Township Budget \$10,919,800 (2012 proposed) x 70% = residential portion = \$7,643,800 ÷ 23,418 Township population 2010 = \$326.41 (assume med. Family = 1.8)
- (4) Estimated at \$20,000 per linear mile/year. Actual savings from Standard Single-Family = 1.65 x \$20,000 = \$33,000

Figure: AR-2 Fiscal Impact Analysis

Proposed Age Restricted Development - Central Bucks School District		
1. Proposed IU-A Community		
a. 113 du @ \$415,000 each ⁽¹⁾		\$46,895,000.00
b. times tax equalization rate of 11.3%		\$5,299,135.00
c. School District Millage 122.8 (b x c)		\$650,733.78
d. Annual EIT collected - $113 \times \$124,000^{(1)} \times .5\% = \$70,060$		\$70,060.00
e. Transfer tax/year: $113 \times \$415,000 \times .5\%/8$ ⁽²⁾		\$29,309.38
2. Proposed IU-B Community		
a. 197 du @\$392,000 each ⁽¹⁾		\$77,224,000.00
b. times tax equalization rate of 11.3%		\$8,726,312.00
c. School District Millage 122.8 (b x c)		\$1,071,591.11
d. Annual EIT collected: $197 \times \$117,600^{(1)} \times .5\%$		\$115,836.00
e. Transfer Tax/year: $197 \times \$392,000 \times .5\%/8$ ⁽²⁾		\$48,265.00
3. Proposed IU-A and IU-B impact on School District		
a. Total Revenue from 1 and 2 above		\$1,985,795.27
b. Total Cost - use per capita multiplier ⁽³⁾		\$0.00
c. Annual Estimated Surplus		\$1,985,795.27

(1) Assumes family income of 30% of sales price

(2) Unit Sale Price reflects present day project sale price based on current economic condition

(3) Assume average resale once in eight years

Figure: SS-1 Fiscal Impact Analysis

Standard Single-Family - Warrington Township		
1. Existing Zoning		
a. Approved 95 lots @ average Sale Price of \$525,000 each ⁽¹⁾		\$49,875,000.00
b. @ Tax equalization ratio of 11.3%		\$5,635,875.00
c. Township real estate millage rate of 11.55 mills (b x c)		\$65,094.36
d. Transfer Tax .5% = \$525,000x.005=\$249,375/8 ⁽²⁾		\$31,171.88
e. Earned Income Tax 95 lots x 157,500 ⁽³⁾ x .5%		\$74,812.50
Total Revenue		\$171,078.73
2. Fiscal Impact - Annual		
a. Total Township Revenue		\$171,078.73
b. Less Total Cost - use per capita multiplier (333 x \$326.41) ⁽⁴⁾		\$108,694.53
c. Annual estimated surplus		\$62,384.20

- (1) Unit Sale Price reflects present day project sale price based on current economic conditions.
- (2) Assume average resale once in eight years
- (3) Assume family income of 30% of sale price
- (4) Township Services - cost calculated based on per capital multiplier and cost of municipal roads: Township Budget \$10,919,800 x 70% = residential portion = \$7,643,860+
23,418 Township population 2010 = \$326.41 (assume med. family = 3.5)

Figure: SS-2 Fiscal Impact Analysis

Standard Single-Family - Central Bucks School District		
1. Existing Zoning		
a. Approved 95 lots @ average Sale Price of \$525,000 each		\$49,875,000.00
b. @ Tax equalization ratio of 11.3%		\$5,635,875.00
c. Real Estate millage rate of 122.8 mills (b x c)		\$692,085.45
d. Transfer Tax .5% = \$525,000x.005=\$249,375/8 ⁽¹⁾		\$31,171.88
e. Earned Income Tax/year 95 lots x 157,500* x .5% ⁽²⁾		\$74,812.50
Total Revenue		\$798,069.83
2. Estimated School Impact		
a. 95 x public school ratio (0.9) ⁽³⁾ = 86		
b. No. of public school students 86 x cost/student \$10,357 ⁽⁴⁾		\$890,702.00
3. Fiscal Impact		
a. Total school revenues		\$798,069.83
b. Less total cost to educate		\$890,702.00
c. Annual estimated surplus (deficit)		(\$92,632.18)

- (1) Assumes average resale once in eight years
- (2) Assumes family income of 30% of sale price
- (3) School age children from 4-bedroom Single-Family detached dwellings, in Pennsylvania; Rutgers University, Center for Urban Policy Research, 2006. (note: new homes tend to be higher, increase factor by 20%, i.e. .75 x 1.2 = .9)
Value assumes all 4-bedroom units. For 5-bedroom unit the public school student value increases to 1.03 (33%increase).
- (4) Based on Central Bucks School District Federal Education Budget Project 2009

Figure R-1

Schools Residential Impact Assumptions

1) By Right	<u>School Population</u> ¹⁾
• Illg 95 Lots	90
• Warrington Glen and Blichasz 160 lots	152
Total	242
2) Split: K thru 6 @ 60%	145
7 thru 12 @ 40%	97
3) Enrollment Impact	<u>With New Enrollment Added</u>
• Mill Creek Elementary (K thru 6): capacity 1,300 ²⁾ Current enrollment 1,083 + 145 = 1, 228 =	94.5% of capacity
• Tamanend (7 thru 9): capacity 1,100 ²⁾ Current enrollment 936 + 48 = 984 =	89.5% of capacity
• Central Bucks South (10 thru 12): capacity 1,990 ²⁾ Current enrollment 1,862 + 49 = 1,911 =	96.0% of capacity

1) Use ratio 0.95 public school per unit single family

2) Estimates provided by Director of Facilities Department;
August 22, 2012

Figure: SE-1
School Enrollment Impacts

School Enrollment Statistics

- 1) Central Bucks South High School (grades 10-12)
 - a. 2011 enrollment – 1,862
 - b. Present estimated capacity – 1,990
 - c. Available capacity – 128 students
 - d. Available capacity per grade – 43 students
 - e. Present capacity utilized (2011) – 94%

- 2) Tamanend Middle School (grades 7-9)
 - a. 2011 enrollment – 936
 - b. Present estimated capacity – 1,100
 - c. Available capacity – 164 students
 - d. Available capacity per grade – 55 students
 - e. Present capacity utilized (2011) – 85%

*Note: there is a second middle school which feeds the CB South High School: Unami Middle School. The Director of Facilities office indicates that that school is at 92.5% capacity including the use of portable classrooms, which have become permanent. One could suggest that if Unami continues to grow, that some of the students from Unami would need to shift to Tamanend.

- 3) Mill Creek Elementary School (grades K-6). It was suggested that due to the number of grades that capacity in elementary schools is evaluated on a grade basis rather than on the overall. Initially, it should be noted that at 1,083 students, Mill Creek Elementary is already the largest elementary school of the 15 elementary schools within the district. The three areas of comparison would be: Policy range for class size, the actual class size and the district average which are listed:

2011-2012 Average Elementary Class Size by Grade Level

	K	1	2	3	4	5	6	School Avg.
Policy Range	15-24	18-28	18-28	18-28	20-30	20-30	20-30	
Mill Creek	19.8	22.7	24.0	25.5	27.5	25.6	26.1	24.6
District Avg.	20.4	22.6	23.2	24.2	25.4	26.0	25.8	23.9

- a. Our comment on the above chart would be to point out that all Mill Creek Elementary class sizes exceed the minimum established by a range of not less than 26% for grade 1 to a high of 42% for grade 4.

Figure: SE-1
School Enrollment Impacts (Continued)

- b. Based on the attached Figure S-1 prepared for both the Illg 95 lots and the Warrington Glen/Blichasz developments of 160 lots, we calculate a total of 242 school age population, which is then split 60% of K-6, which equals 145 potential new students and 40% grades 7 thru 12.
- c. Then, divide 145 by 7 grades; we get approximately 21 new students per grade. Then see the next figure (ES-1) which lists the number of sections (classrooms), which calculates the following additional students per elementary school class:
 - K = 4 additional per class (this increases the average to 23.8) virtually a max out of the 24 given per K section.
 - Grades 1, 3 and 4 which have 6 sections, 3.5 additional students would be added per section which brings grades 3 and 4 above the maximum of the policy range of 28 for grade 3 and 30 for grade 4.
 - Grades 2, 5 and 6, 3 additional students per grade would be added. Grade 2 would exceed the policy range of 28. Grade 5 and 6 would approach the maximum policy range of 30 students per section.
- 4) Summary of Impacts: Another way to look at it would be to calculate the percentage of present capacity that would be used by the new students generated from the Illg and Warrington Glen/Blichasz developments.
 - a. At CB South 38% of the current capacity would be used up.
 - b. At Tamanend 21% of the capacity would be used up
 - c. At Mill Creek look at the capacity at each grade level as calculated above. The result would be that all of the capacity of certain grades would be used up and a high percentage of the capacity, say between 50-70% capacity would be used up for classes in other grades.
 - d. A cautious and smart decision would be to always have some reasonable reserve and that would be lost, based on the addition of these residential communities.

Figure: ES-1
Elementary Schools Enrollment (by Grade)

Elementary Schools



October, 2011

Elementary Schools	K	*Ekdg	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Subtotal	FT Life Skills	FT Learning Support	FT Emotional Support	FT Autistic Support	FT Multi-Handicap	Total
Barclay*	60	15	81	57	70	62	83	88	516						516
# of sections	3	1	4	3	3	3	3	3	23						
Bridge Valley	69		123	121	130	133	130	143	849				39		888
# of sections	3		5	5	5	5	5	5	33				7		
Buckingham	50		82	79	75	76	77	90	529				24		553
# of sections	3		4	3	3	3	3	4	23				3		
Butler	95		138	127	110	109	114	116	809						809
# of sections	5		6	5	5	4	4	5	34						
Cold Spring	67		79	108	109	118	127	149	757	7			17		781
# of sections	3		4	5	4	5	5	5	31	1			2		
Doyle	69		75	55	78	65	80	76	488						488
# of sections	3		3	3	3	3	3	3	21						
Gayman	52		66	72	83	89	84	74	520		9				529
# of sections	3		3	3	4	3	3	3	22						
Groveland*	70	15	110	143	156	148	163	155	960					8	968
# of sections	3	1	4	6	6	6	6	6	38					1	
Jamison	59	10	81	98	101	96	110	120	675						675
# of sections	3		4	4	4	4	4	5	28						
Kutz	85		83	99	70	88	99	85	609				21		630
# of sections	4		4	4	3	3	4	3	25				3		
Linden	73		67	59	66	77	78	72	492		18	27			537
# of sections	3		3	3	3	3	3	3	21		3	3			
Mill Creek	99		136	168	153	165	179	183	1083						1083
# of sections	5		6	7	6	6	7	7	44						
Pine Run	63		76	77	64	78	79	79	516				10		526
# of sections	3		3	3	3	3	3	3	21				2		
Titus	75		88	87	98	84	99	89	620			19			639
# of sections	4		4	4	4	3	4	4	27			2			
Warwick*	42	5	68	86	67	58	59	78	463				30		493
# of sections	2	1	3	4	3	3	3	3	22				4		
TOTALS	1018	45	1353	1436	1430	1446	1561	1597	9886	7	27	46	141	8	10,115
# of sections	50	3	60	62	59	57	60	62	413						

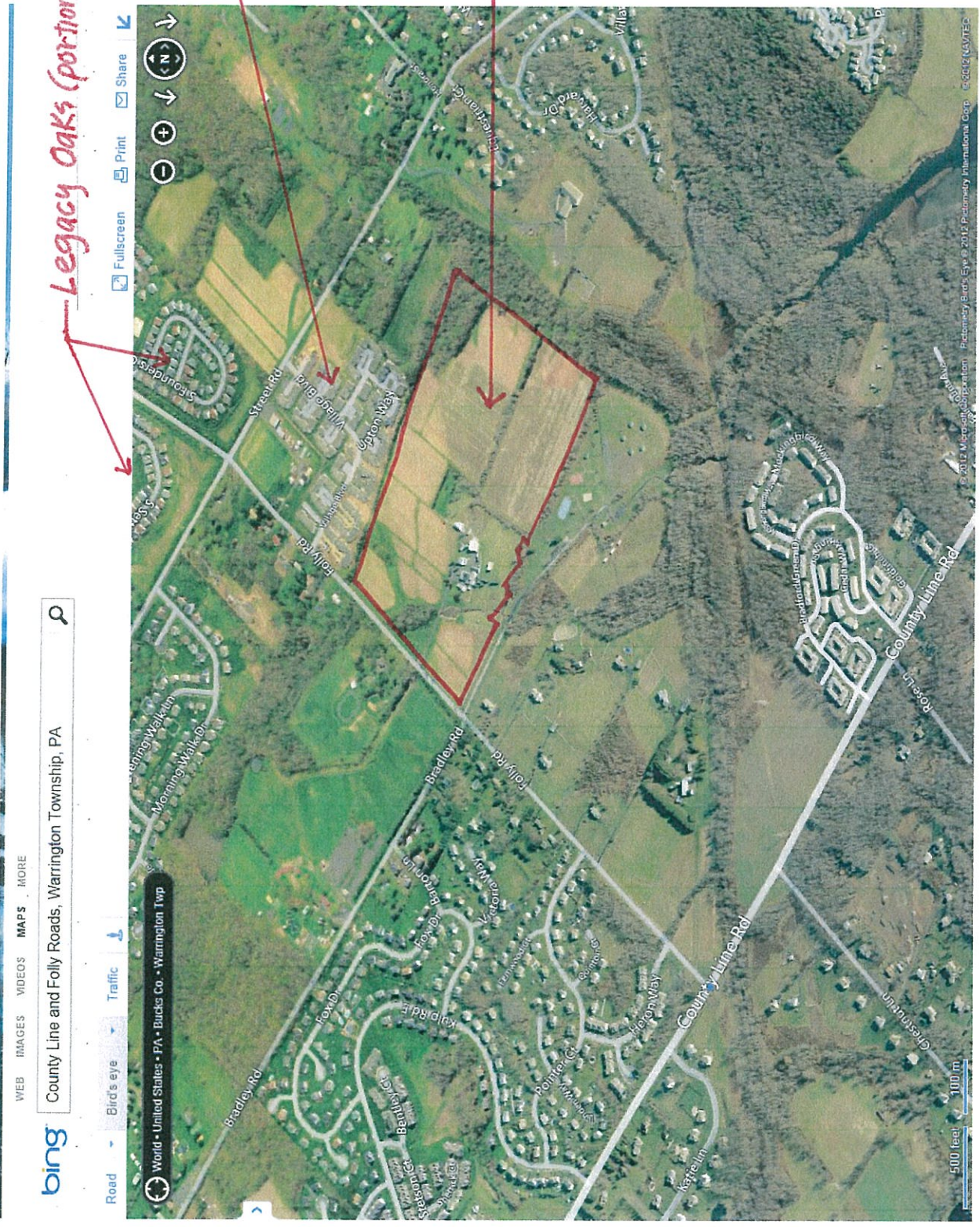
*Extended Day Kindergarten

Source: Enrollment Statistics; 2011-2012 School Year, Report to the Board of School Directors, Presented October 11, 2011

Legacy Oaks (portion of)






Lamp Lighter Village

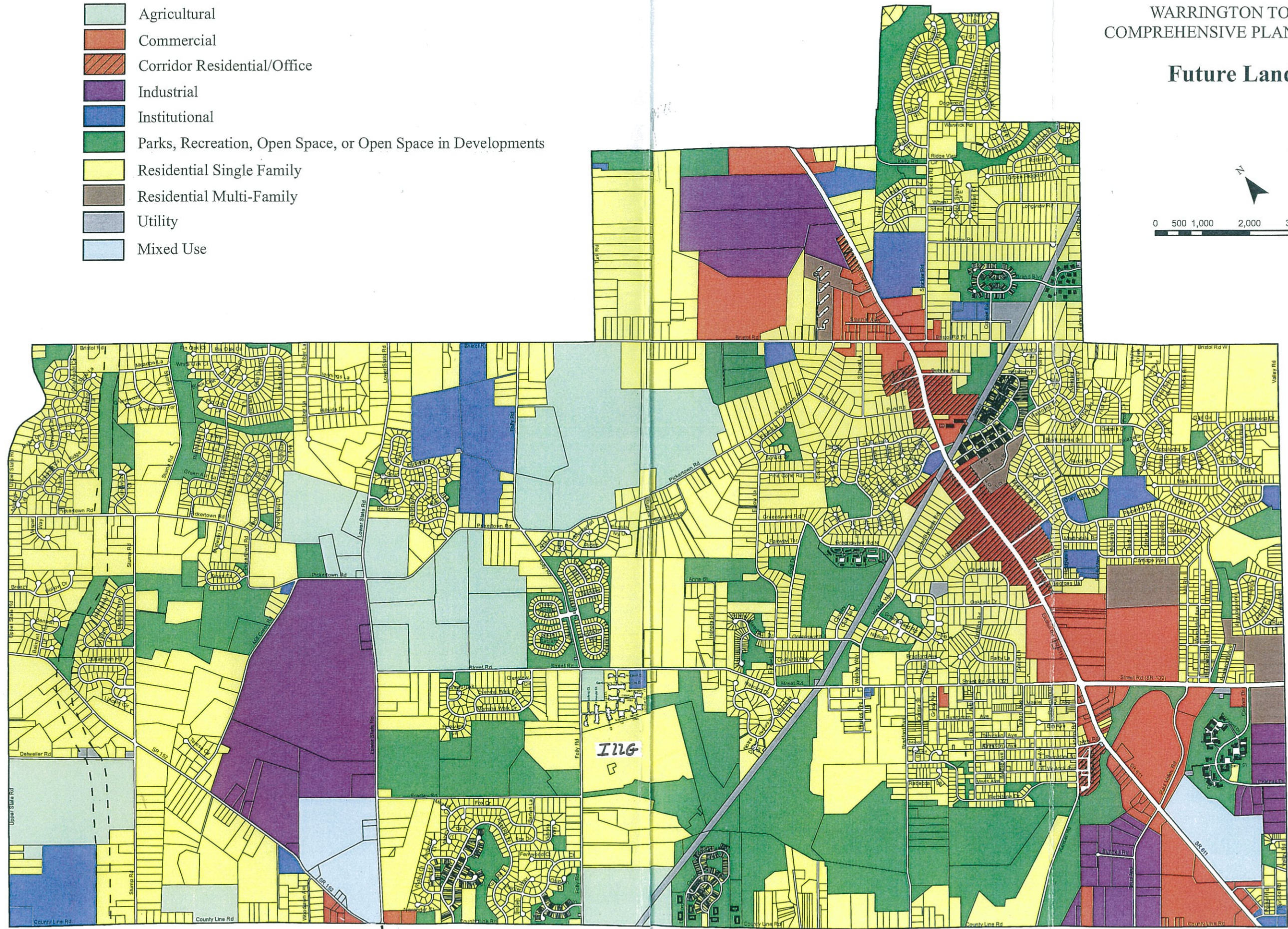
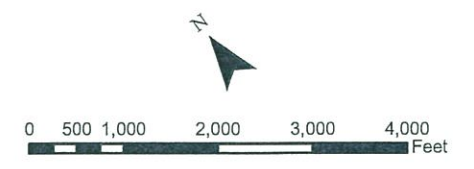
Illeg Property



Aerial View looking Northwest from County Line Road

Future Land Use

-  Agricultural
-  Commercial
-  Corridor Residential/Office
-  Industrial
-  Institutional
-  Parks, Recreation, Open Space, or Open Space in Developments
-  Residential Single Family
-  Residential Multi-Family
-  Utility
-  Mixed Use



Horsham Township