

# 2009 Annual Summary

Subdivision, Land Development, and Zoning Activity



Montgomery County, Pennsylvania

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Montgomery County Planning Commission

# 2009 Annual Summary

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This report summarizes the subdivision, land development, and zoning proposals received by the Montgomery County Planning Commission in 2009. The proposals were reviewed under the requirements of the Pennsylvania Municipalities Planning Code (Act 247).

The information and statistics in this report reflect proposals and approved plans only - not actual construction activity. Information on construction activity is available from municipal building inspectors and zoning officers as well as the Montgomery County Board of Assessment Appeals. Subdivision activity is recorded on tax maps, which are available for viewing in the Montgomery County Board of Assessment Appeals map room. The Planning Commission also publishes two annual reports covering residential and nonresidential construction activity for the previous year. These reports are usually published in early summer.

Proposed plans are preliminary plans under consideration for municipal approval. Proposed plan characteristics discussed in this report include residential acreage and unit number and type, nonresidential acreage and square footage and a brief discussion of zoning text and map amendments submitted for review.

This report also includes information on approved plans. This information, based upon plans that have received municipal approval (county approval is not required under the law), is presented for the number of development proposals, the number of residential units, and the amount of nonresidential square footage. It should be noted that these approved plans were not necessarily submitted in 2009. In fact, many had been submitted in previous years and were under review by local municipalities. Once plans are approved, applicants require building permits and other necessary permits before construction begins.

The report also contains a brief summary of zoning amendments. Special requests for review (such as conditional uses) are not included.

This report can be used to indicate areas of the county that may experience development in the future. Ten-year summaries are included to provide a historical perspective.

Beginning in 2004, the Annual Summary includes analysis of land development with regard to the newly adopted *County Comprehensive Plan*. The location, type, and intensity of development has been compared to county plan goals in each applicable section of this report.

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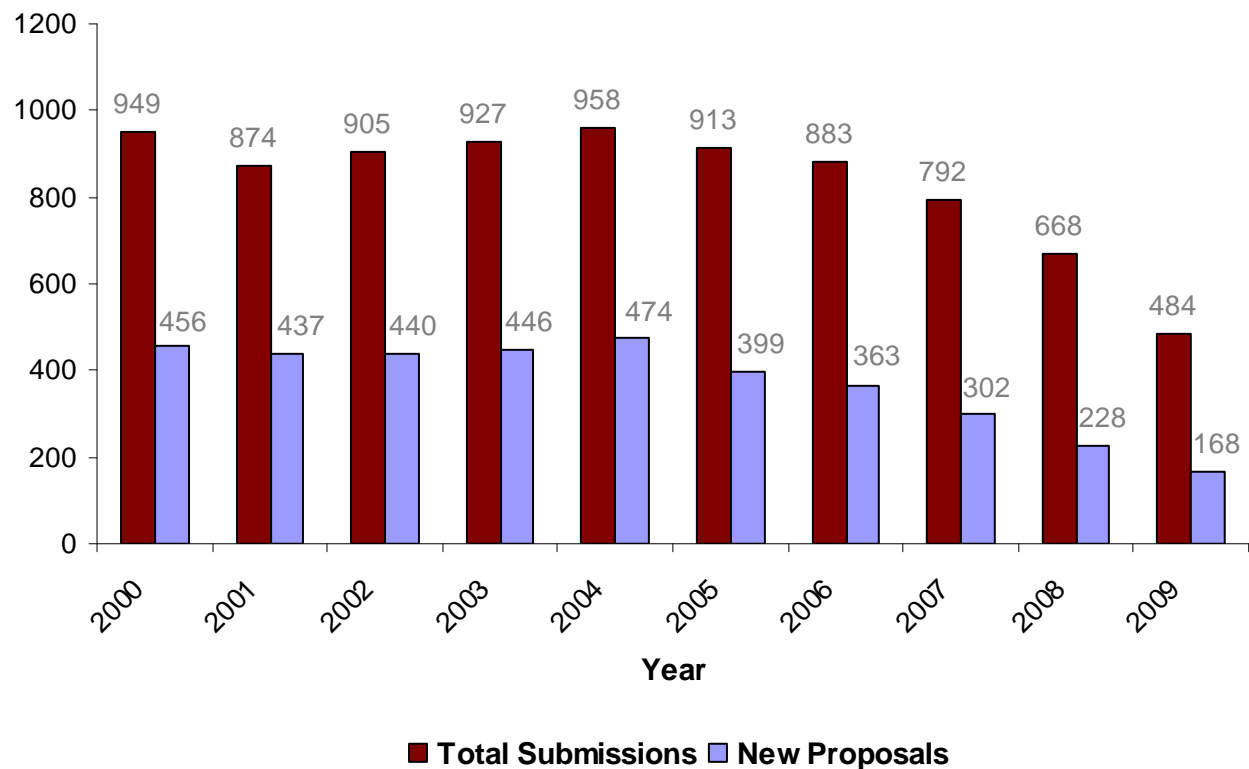
## Section One

### Number of Submissions

In 2009 the Planning Commission received 484 applications for subdivision, land development, and zoning ordinance and map amendments. This was 28% less than in 2008. The total number of submissions has decreased for five straight years and is now the lowest it has been since 1970, when comparable county records began being recorded.

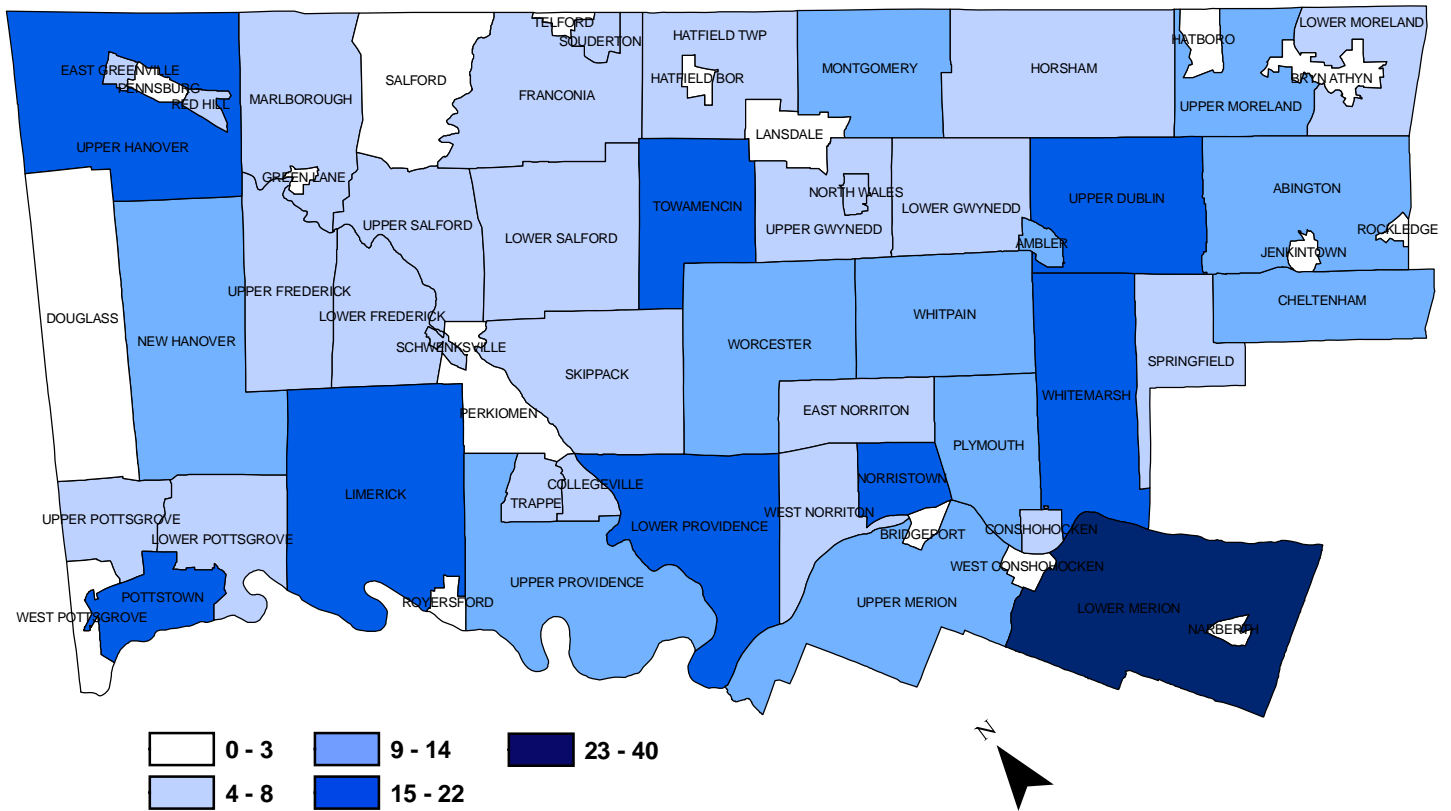
A development proposal can undergo many revised submissions before it is either approved or the applicant gives up on the project. The 2009 submissions include 168 new proposals for land developments or subdivisions that had not been previously submitted with similar land use and density components.

**Total Annual Submissions and New Proposals, 2000 - 2009**



**Section One: Number of Submissions**

**Number of Submissions by Municipality, 2009**



A look at the county map above reveals that submission activity is fairly dispersed, although activity was consistently low in the Indian Valley and Central Perkiomen Valley regions. Lower Merion had the most submissions with 40, but Towamencin, Limerick, and Upper Hanover also had 20 submissions or more.

**Section One:** Number of Submissions

**Montgomery County Submissions by Municipality, 2009**

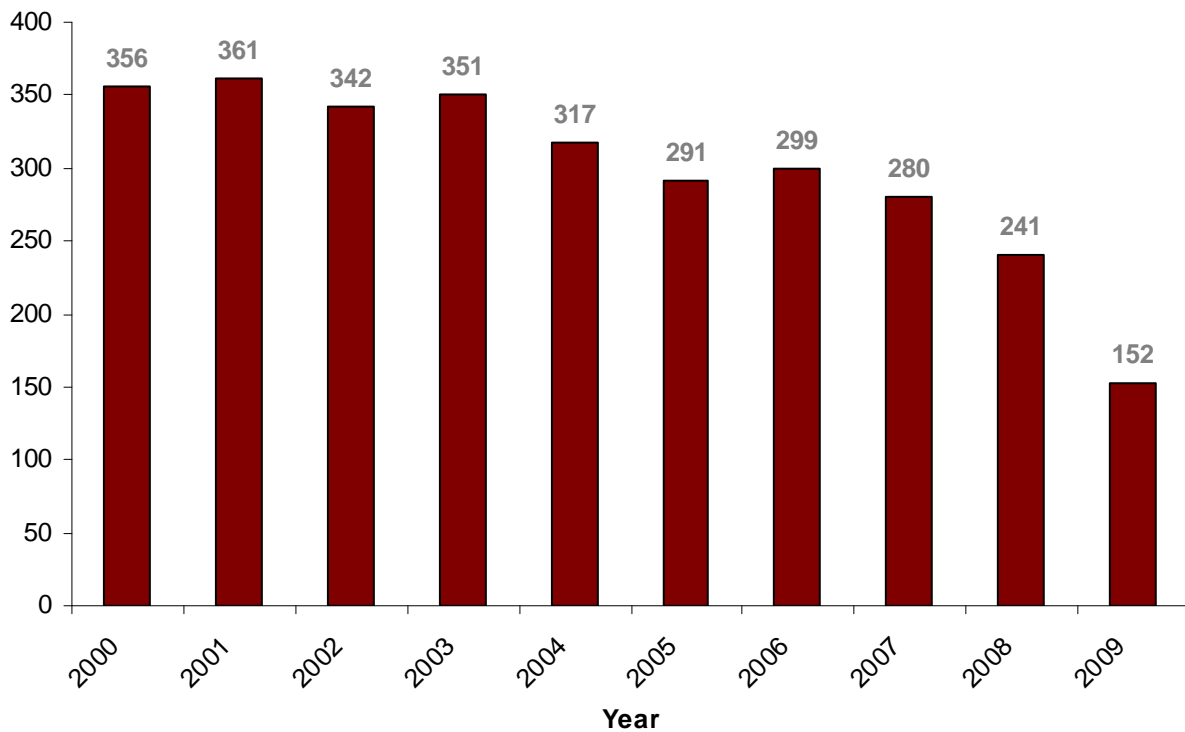
Municipality	Total	Land Developments	Subdivisions	Municipality	Total	Land Developments	Subdivisions
Abington	13	2	7	North Wales	4	1	1
Ambler	11	7	4	Pennsburg	3	1	1
Bridgeport	2	2	1	Perkiomen	3	2	1
Bryn Athyn	3	0	2	Plymouth	14	7	2
Cheltenham	10	7	2	Pottstown	17	11	8
Collegeville	7	4	0	Red Hill	4	0	0
Conshohocken	5	2	3	Rockledge	0	0	0
Douglass	1	0	0	Royersford	0	0	0
East Greenville	4	3	0	Salford	2	2	1
East Norriton	5	2	0	Schwenksville	7	2	0
Franconia	6	2	2	Skippack	4	1	3
Green Lane	1	0	0	Souderton	5	1	2
Hatboro	3	3	1	Springfield	8	5	3
Hatfield Borough	2	0	1	Telford	1	0	0
Hatfield Township	6	4	2	Towamencin	22	14	3
Horsham	8	4	3	Trappe	6	2	0
Jenkintown	0	0	0	Upper Dublin	16	3	3
Lansdale	3	2	0	Upper Frederick	7	1	1
Limerick	20	16	4	Upper Gwynedd	6	2	3
Lower Frederick	6	4	2	Upper Hanover	20	6	11
Lower Gwynedd	5	2	1	Upper Merion	14	6	4
Lower Merion	40	15	13	Upper Moreland	13	4	0
Lower Moreland	6	1	2	Upper Pottsgrove	5	1	2
Lower Pottsgrove	4	2	0	Upper Providence	11	2	3
Lower Providence	18	6	6	Upper Salford	4	0	3
Lower Salford	7	0	1	West Conshohocken	2	1	0
Marlborough	5	0	2	West Norriton	4	2	1
Montgomery	13	6	4	West Pottsgrove	2	0	0
Narberth	1	1	1	Whitemarsh	18	8	2
New Hanover	11	1	6	Whitpain	9	4	2
Norristown	16	6	1	Worcester	10	6	6
				<b>Totals</b>	<b>483</b>	<b>199</b>	<b>137</b>

Note: Total does not include an additional review for the Chester County Comprehensive Plan.

**Approved Plans**

In 2009, 152 plans were approved by their respective municipalities. This was the lowest total of approved plans since approvals were recorded beginning in 1990. This is further indication of the general slowing of development activity in the county. Given the continued reduction in submissions, the Planning Commission expects overall approved plans to continue to decline as well over the short-term.

**Total Plans Approved, 2000 - 2009**



**Conclusion**

After reaching a ten-year high in 2004, the number of submissions to the Planning Commission has declined each year, but it reached a historical low point by dropping 28 percent in 2009. From 2000 to 2006, the average number of submissions each year was over 900. The deepening declines in the last three years are the result of a staggering economy marked by high unemployment and severely tightening financial constrictions from creditors. Some prior plans, even if approved, lay dormant due to developers having either their own financial issues or just not being able to get necessary credit from lending institutions. The remainder of this report will elaborate on the type, location, and intensity of land development proposals in the county with comparisons to ten-year trends. Also included is an analysis with regard to the *County Comprehensive Plan* goals and policies.

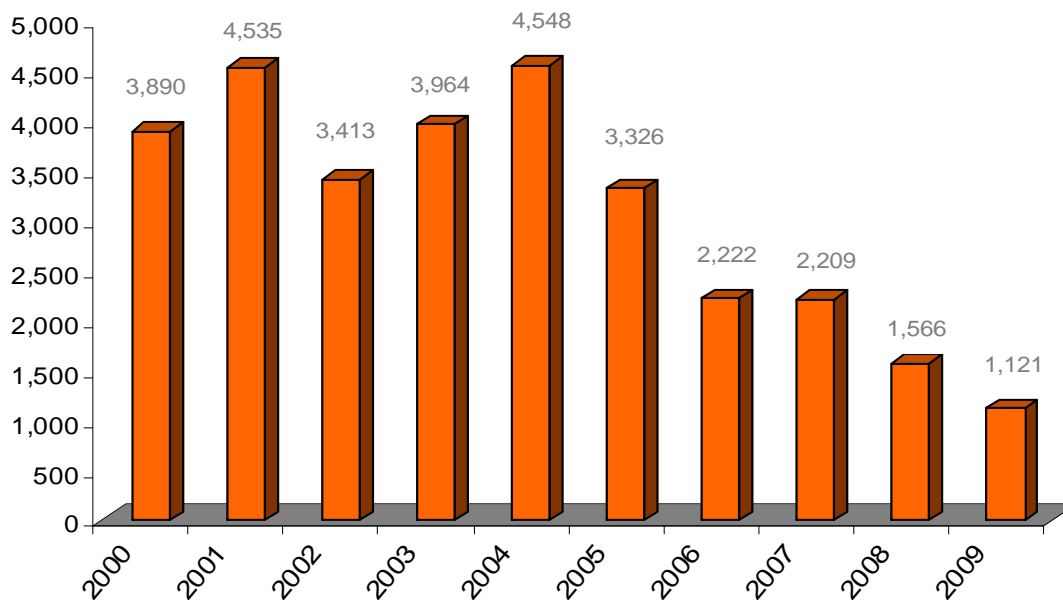
## Section Two

### Acres of Submissions

#### Countywide Acres Proposed for Development

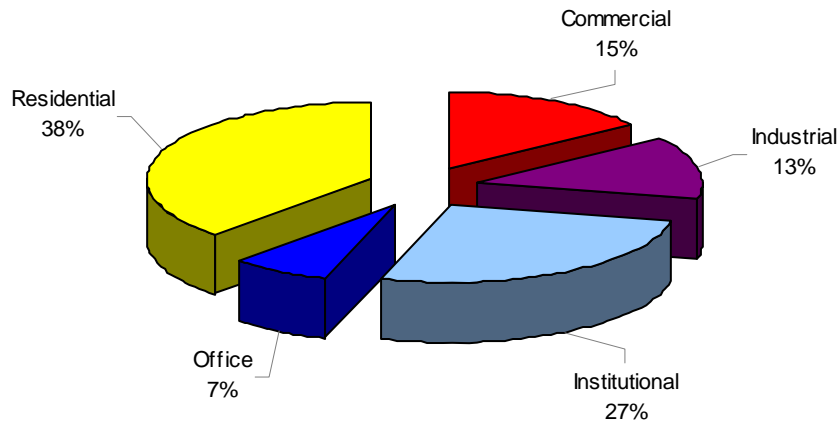
The total amount of land proposed for development in 2009, which excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates or utilities, was 1,121 acres. This represents a decline of 28% from 2008 to 2009. The total number of acres proposed for development has decreased for five straight years and is now the lowest it has been since 1970 when comparable county records began being recorded.

**Acres Proposed for Development, 2000 - 2009**



The chart below shows the breakdown of acreage proposed for development by land use type. Land proposed for residential use is typically the largest land consumer. In 2009, 38% of acreage proposed was for residential use, with institutional use the second largest consumer of land at 27% of acreage proposed for development.

**Acres Proposed for Development by Type, 2009**



The amount of land proposed this year for residential use, 423 acres, was lower than at any other time since 1970 when comparable county records began being recorded. Total nonresidential acreage has been greater than residential acreage in each of the last four years, although this has not always been the case as the frequency of specific types of development are generally cyclical based on the current market at the time for various sectors.

**Municipal Acres Proposed for Development**

The table on the opposite page shows the dispersal of proposed acres throughout the county. In 2009, Lower Merion Township lead the county with 152 acres proposed for development, over half of that total going towards a hospital expansion. Other leading municipalities included Horsham, Whitpain, Worcester, and Hatfield Townships.

**Section Two : Acreage of Submissions**

**Montgomery County Acres Proposed For Development by Municipality, 2009**

Municipality	Total	Nonresidential	Residential
Abington	38	22	17
Ambler	3	2	1
Bridgeport	0	0	0
Bryn Athyn	6	0	6
Cheltenham	25	14	11
Collegeville	1	1	0
Conshohocken	1	0	1
Douglass	0	0	0
East Greenville	2	1	0
East Norriton	7	0	7
Franconia	43	38	6
Green Lane	0	0	0
Hatboro	3	0	3
Hatfield Borough	0	0	0
Hatfield Township	63	31	32
Horsham	130	75	55
Jenkintown	0	0	0
Lansdale	1	0	0
Limerick	53	30	23
Lower Frederick	8	5	3
Lower Gwynedd	3	3	0
Lower Merion	152	119	34
Lower Moreland	2	0	2
Lower Pottsgrove	0	0	0
Lower Providence	26	12	15
Lower Salford	3	0	3
Marlborough	0	0	0
Montgomery	26	2	24
Narberth	1	0	1
New Hanover	15	0	15
Norristown	2	2	1

Municipality	Total	Nonresidential	Residential
North Wales	10	9	1
Pennsburg	0	0	0
Perkiomen	0	0	0
Plymouth	50	40	10
Pottstown	7	1	6
Red Hill	0	0	0
Rockledge	0	0	0
Royersford	0	0	0
Salford	10	3	7
Schwenksville	1	0	1
Skippack	13	10	3
Souderton	1	0	1
Springfield	39	38	2
Telford	0	0	0
Towamencin	8	8	0
Trappe	1	1	0
Upper Dublin	2	0	2
Upper Frederick	1	1	0
Upper Gwynedd	2	0	1
Upper Hanover	42	32	11
Upper Merion	29	15	14
Upper Moreland	3	0	3
Upper Pottsgrove	41	38	3
Upper Providence	9	3	6
Upper Salford	16	0	16
West Conshohocken	0	0	0
West Norriton	33	33	0
West Pottsgrove	0	0	0
Whitemarsh	44	44	0
Whitpain	80	67	13
Worcester	66	0	66
<b>Totals</b>	<b>1,121</b>	<b>698</b>	<b>423</b>

Note: Figures include age restricted development and exclude agricultural, residential country estates, municipal, open space, recreation, and utility acreage.

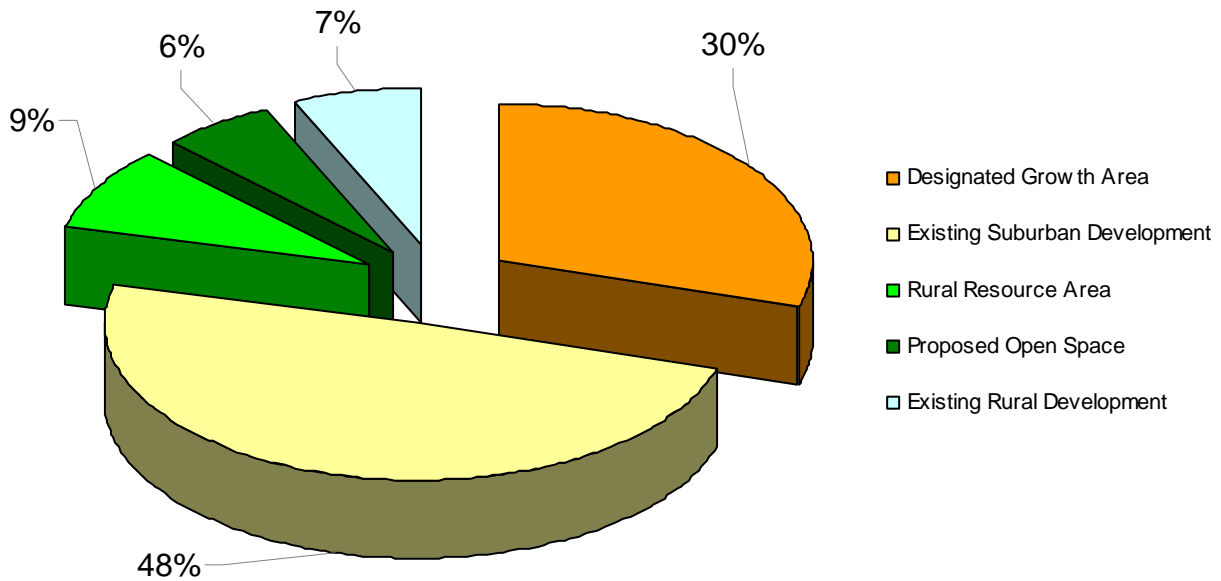
**Acreage Proposed for Development on Previously Developed Sites**

In 2000, the Planning Commission began tracking the amount of existing developed land with regard to proposed subdivisions and land developments. A record is kept of the approximate percentage of a site proposed for development that already has a structure, parking lot, or some other form of man-made feature. In 2009, the Planning Commission estimates that approximately 43% of the acres proposed for development had some such feature on it. This rate is consistent with the last few years and is indicative of a trend toward residential, commercial, and industrial infill development, rather than toward developing tracts of previously undisturbed open space.

**County Growth and Preservation Plan**

One of the main components of the County Comprehensive Plan, the *County Growth and Preservation Plan*, recommends higher density development in proximity to existing developed areas and low intensity development in rural areas. Subdivision and land development proposals were mapped and evaluated with regard to the *County Growth and Preservation Plan*. This analysis shows that 85% of the acres proposed for development were located in existing developed or designated growth areas, a figure well above the average for the years 2005 through 2009 (79%).

**Growth and Preservation Plan, Proposed Acreage, 2009**

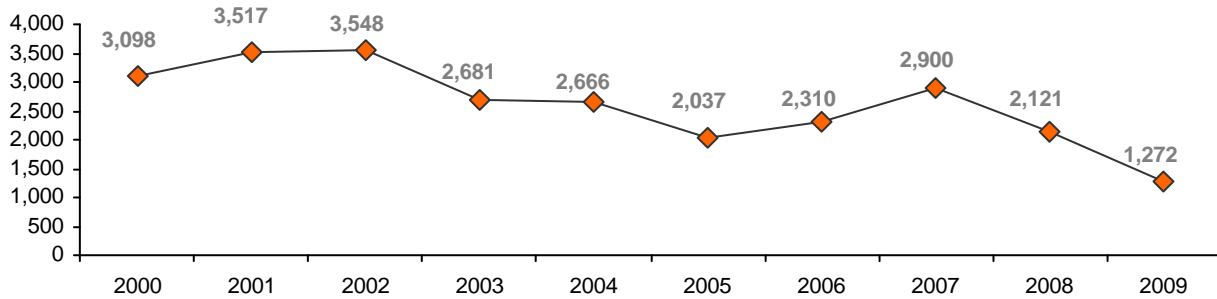




**Acres of Land Approved for Development**

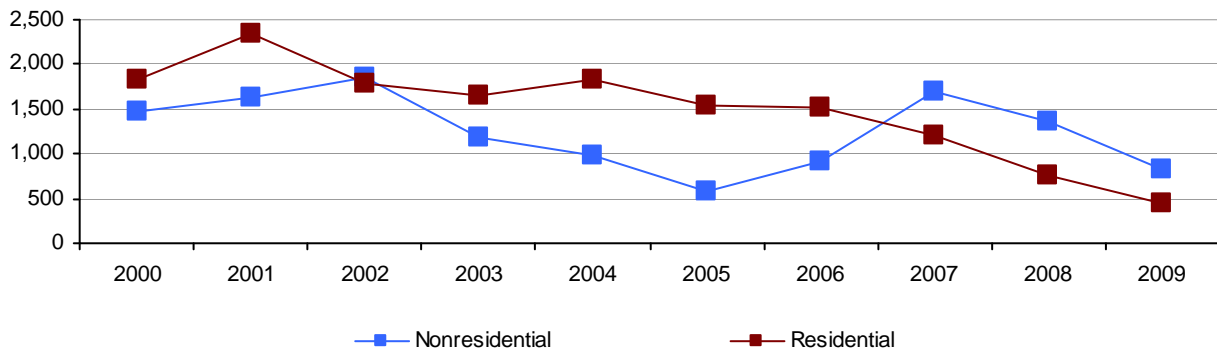
In this section, the total amount of land approved for development excludes land set aside for municipal use, open space, agricultural lands, recreation areas, residential country estates or utilities. In 2009, 1,272 acres were approved for development. This was a 40% decrease from the 2008 total of 2,121 approved acres.

**Approved Total Acreage, 2000 - 2009**



The trend for the past three years has been for nonresidential proposals to consume more land than residential proposals. Before this period, it was residential uses that dominated the acreage comparison. In 2009, both types of uses were well below average. While the 835 proposed acres for nonresidential uses was below the ten year average of 1,268 acres, the residential total of 437 acres paled even further from its ten year average of 1,599 acres.

**Acreage Approved for Development by Type, 2000 - 2009**

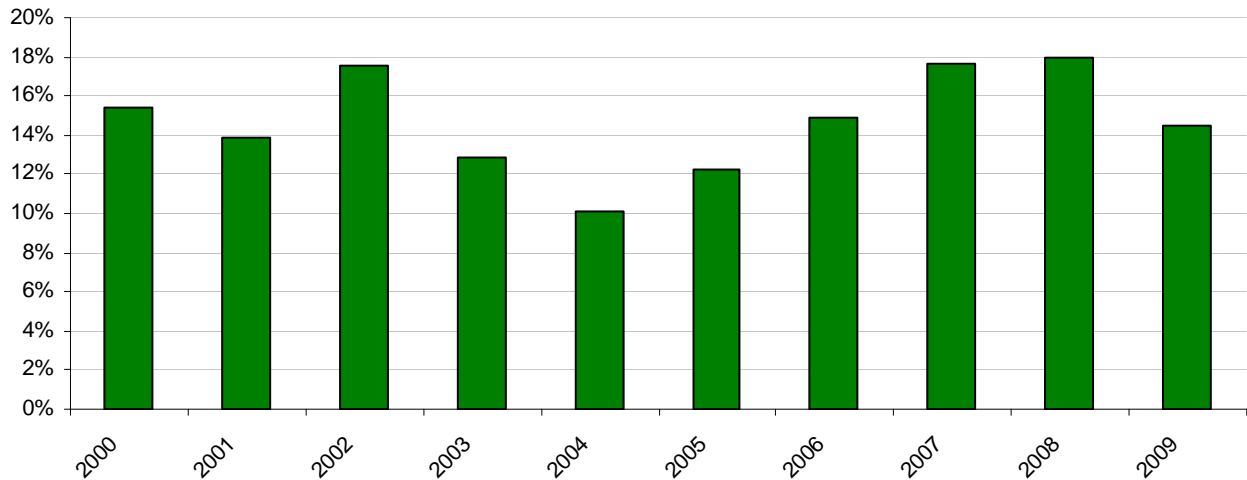


**Acres of Land Approved as Private or Public Open Space**

In 2009, 184 acres of open space were included in approved plans. This figure represents land that was set aside as privately or publicly owned land restricted from further development. It includes public and private parks, central green areas, commonly owned stormwater detention facilities, and natural areas including wetlands and floodplains. Acres that were approved as open space through subdivision and land development plans were dedicated to both public and private ownership. It should be noted that this analysis does not account for every acre preserved as open space in the county. Absent from this analysis are fee simple purchases of properties that do not involve subdivisions or land development, unlotted open space on condominium developments, and purchases of development rights through the Montgomery County Agricultural Preservation Program.

The total acreage set aside as open space in plans approved in 2009 was markedly less than in 2008 when 381 acres were set aside, but this is not unexpected since the number of acres approved for development was also significantly down from the year before. As a percentage of acres approved for development, the amount of open space was equal to 14% of total approved acreage. This was a decrease in percentage compared to 2008, but it still ranks very close to the median percentage (15%) over the ten year span.

**Open Space as a Percentage of Acres Approved for Development, 2000 - 2009**



**Conclusion**

The amounts of acreage proposed or approved for development in 2009 decreased from 2008 totals. Proposals in terms of acreage have been declining every year since 2004 and are now at their lowest point since records began in 1970. Approvals have only declined for two years but also now rest at a historically low level. Given the declining proposals we do not anticipate that actual development activity will rebound in the immediate future.

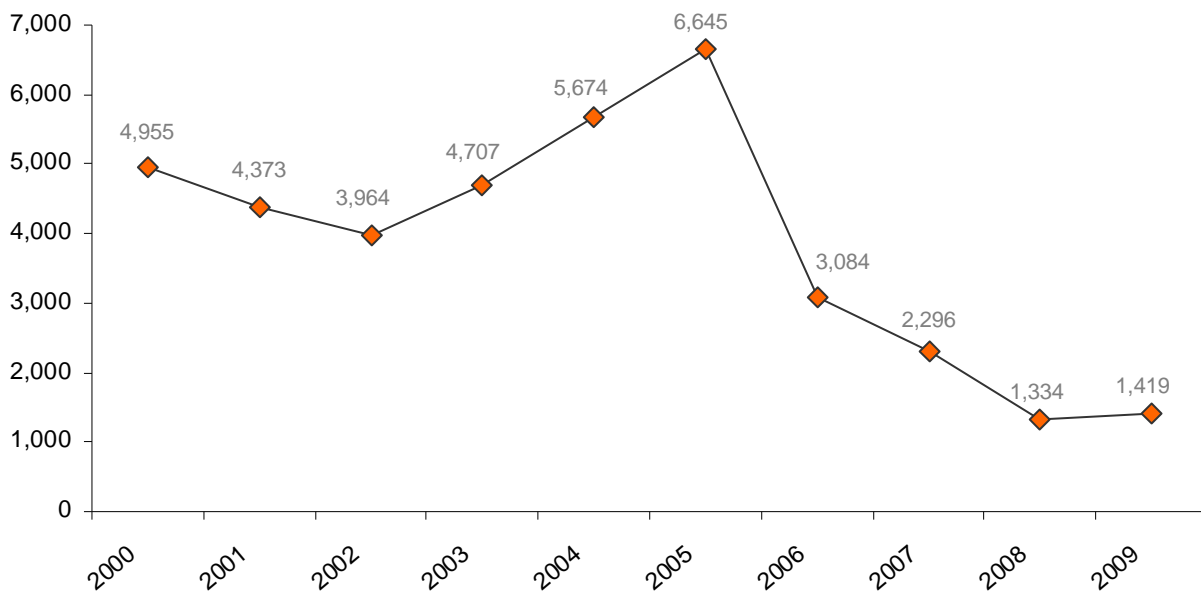
## Section Three

### Residential Submissions

#### Proposed Residential Development

The total number of proposed residential units actually increased in 2009. There were 1,419 units proposed in 2009, a 6% increase over 2008 (1,334 units). Given the economy and the general downturns in submissions and acreage consumed over the last year, this is a slight surprise to see any kind of increase in the residential category. However, an overview of recent and historical residential trends puts the modest increase in context.

**Proposed Residential Units, 2000 - 2009**

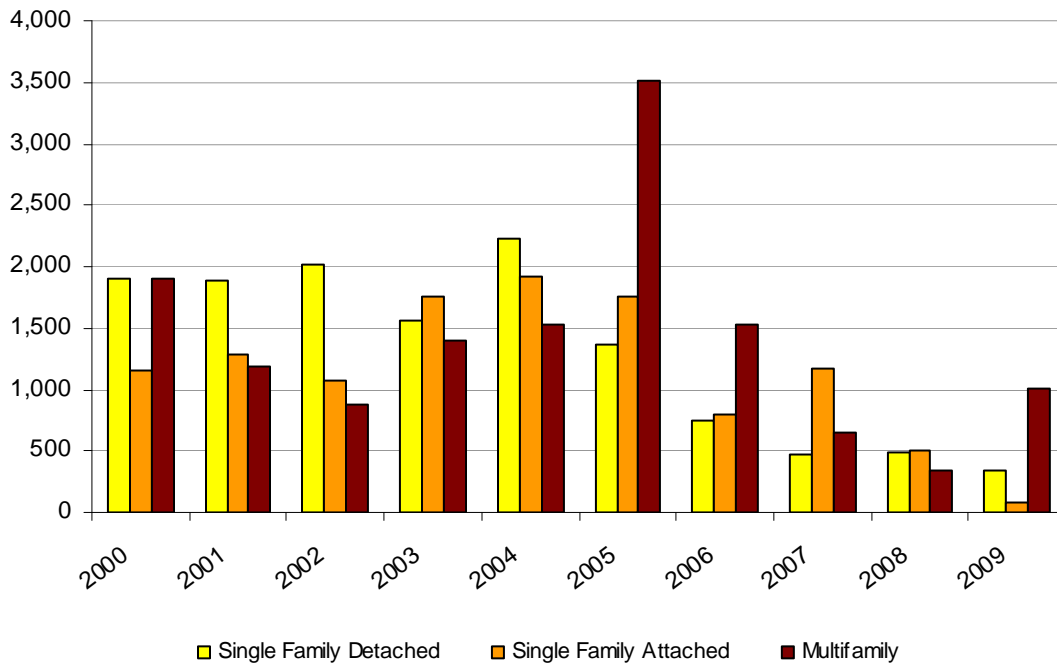


The median annual total for proposed residential units during the 1980's was 7,344 units. The median was 3,290 units during the 1990's and 4,169 units during the current decade. The previous year's total of 1,334 units marks the lowest annual figure since records began in 1970. While units increased in 2009, it was not enough to keep last year from being the second lowest total behind 2008. The first half of the decade showed very strong residential activity, peaking in 2005 with over 6,000 units proposed, but that activity has dropped substantially over the second half of the decade due to a downturn in the economy, corrections in an exaggerated housing market, and problems with lending institutions that have resulted in tightening credit and an increase in foreclosures.

**Residential Proposals by Type**

In 2009, multifamily housing types represented the greatest number of housing units proposed, continuing a shift over the second half of this decade toward fewer single family detached units. Multifamily and single family attached units comprised 76% of all proposed units in the county for 2009. Overall, single family detached and single family attached units decreased from 2008, but the increase in multifamily units made up for their loss. Attached units fell the most, going from 509 units in 2008 to only 75 units in 2009. This kind of dramatic swing from one year to the next is not unusual, especially in a period of low activity when a couple of major developments can really affect the annual comparisons.

**Proposed Residential Units by Type, 2000 - 2009**



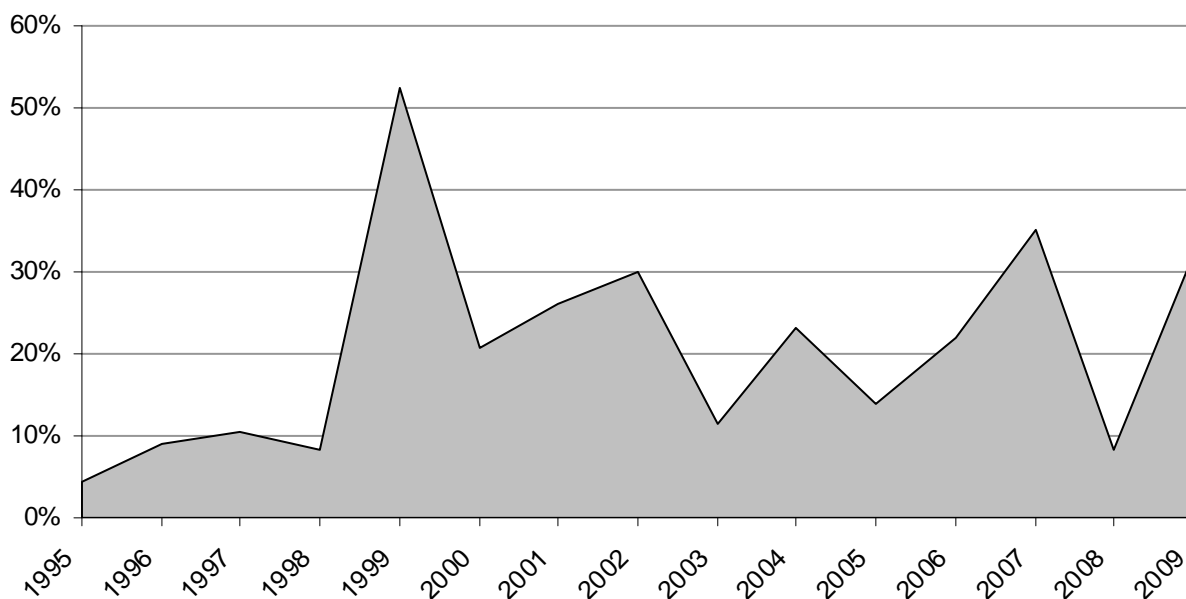
**Proposed Development of Residential Housing Units, 2008 - 2009**

Housing Type	2009	2008	Change
Single Family Detached	337	378	-11%
Single Family Attached	75	509	-85%
Multifamily	1,007	337	199%

### Age-Restricted Housing Development

There were 456 age-restricted units proposed in 2009, and they were all of the multifamily housing type. This represents a noticeable increase from the 2008 total of only 110 units, but it is still the second smallest total since 1998. Age-restricted units accounted for 32% of the total number of units proposed in 2009. This ranks very high over the last 15 years, but as with annual housing type figures, age-restricted proposals can fluctuate from year to year. Despite a few dips in activity, age-restricted development has accounted for a significant portion of residential submissions in the county since 1999.

**Proposed Age-Restricted Housing as a Percentage of Total Housing Units, 1995 - 2009**

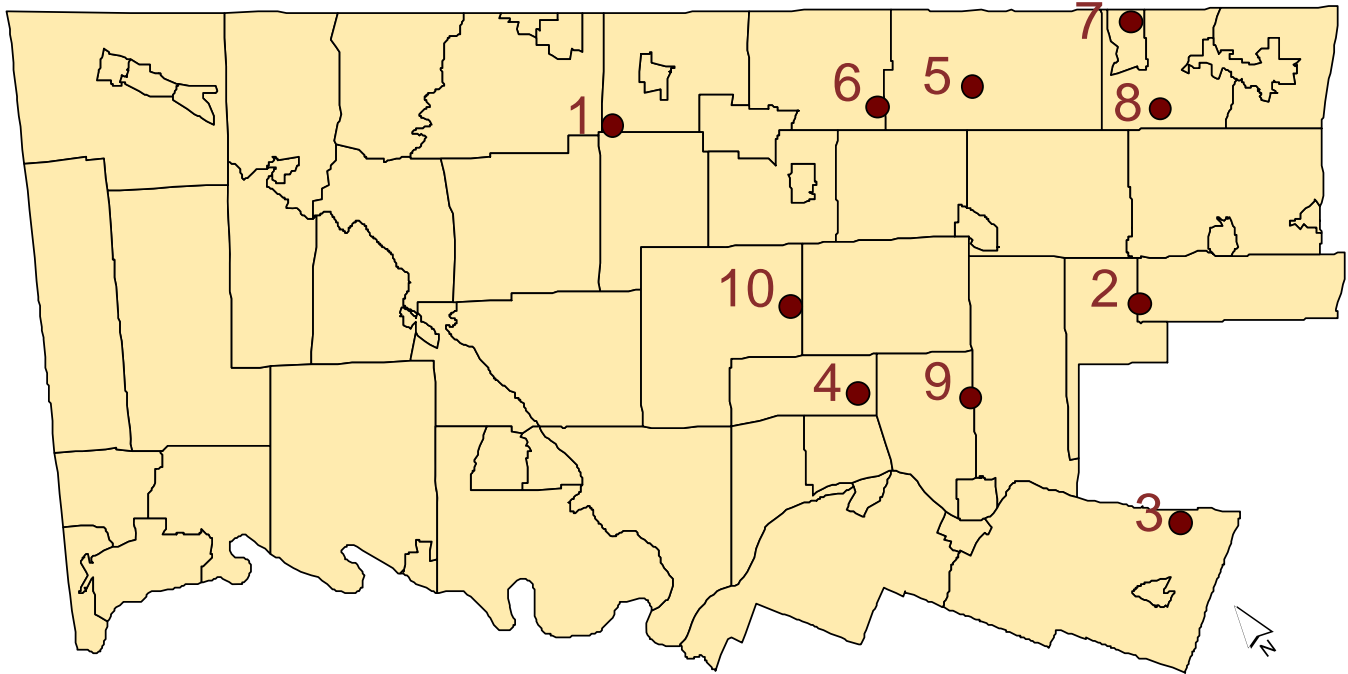


### Largest Residential Proposals

The list of the top ten largest residential proposals on the following page reflects why multifamily and age-restricted housing types had a strong presence in residential activity for 2009. The top four proposals were all multifamily developments. The top two, Derstine Run in Hatfield Township and Laverock in Cheltenham Township, also happened to be age-restricted developments. The only single family detached development with over 100 units was a proposal to build 124 units on top of the Horsham Valley Golf Club in Horsham Township.

Further analysis of the ten largest residential developments reveals that two of these developments included a total of 30,720 square feet of commercial or office space, two projects preserved approximately 64 acres of open space, and four of the ten proposals are infill projects located on sites that had been previously developed.

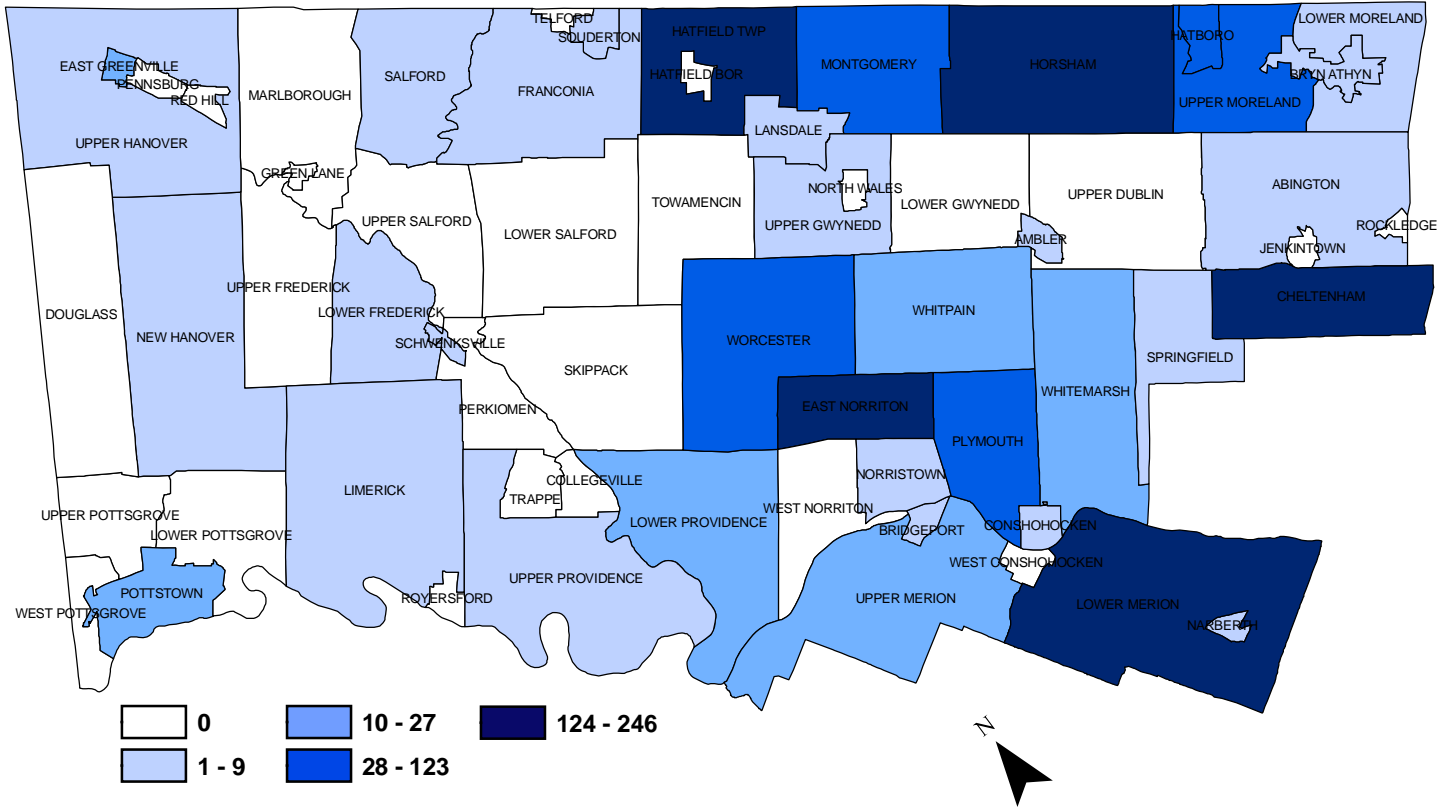
**Location of Top Ten Largest Residential Proposals, 2009**



**Montgomery County Largest Residential Proposals, 2009**

	<b>Development Name</b>	<b>Units</b>	<b>Type</b>	<b>Municipality</b>
1.	Derstine Run - Phase 1 & 2	240	MF (age-restricted)	Hatfield Township
2.	Laverock	216	MF (age-restricted)	Cheltenham
3.	211 Belmont Avenue & 221 Rock Hill Road	192	MF	Lower Merion
4.	Provident	190	MF	East Norriton
5.	Horsham Valley Golf Club Subdivision	124	SFD	Horsham
6.	The Enclave At Montgomery / Montgomery Preserve & Montgomery Knoll	57	SFD	Montgomery
7.	Hatboro Stove Works Phase 2	55	MF	Hatboro
8.	501 York Road Student Housing	50	MF	Upper Moreland
9.	Cold Point Village	46	SFA	Plymouth
10.	The Preserve at Worcester	39	SFD	Worcester

Proposed Housing Units by Municipality, 2009



**Municipal Residential Units Proposed for Development**

The table on the following page lists proposed residential unit totals by type for each municipality. Hatfield, Lower Merion, and Cheltenham Townships received the most residential activity with over 200 units proposed in each municipality. East Norriton and Horsham Townships rounded out the top five with 190 and 124 units, respectively.

Geographically, the countywide map above shows that residential proposals have really been targeted in the east and central portions of the county. There is generally less open land available in these areas so much of the new development is likely to be infill or redevelopment. In the past, we have seen much larger numbers of proposals in the western communities as more easily developed land is available. While this is only one year and development is dramatically down, this also might reflect an increasing appeal to more urban settings that are closer to existing jobs and infrastructure.

**Section Three: Residential Submissions**

**Montgomery County Proposed Residential Units by Municipality: 2009**

Municipality	Total	Detached	Attached	Multifamily
Abington	1	1	0	0
Ambler	7	1	4	2
Bridgeport	4	0	4	0
Bryn Athyn	2	2	0	0
Cheltenham	217	1	0	216
Collegeville	0	0	0	0
Conshohocken	7	0	7	0
Douglass	0	0	0	0
East Greenville	12	0	0	12
East Norriton	190	0	0	190
Franconia	3	3	0	0
Green Lane	0	0	0	0
Hatboro	56	1	0	55
Hatfield Borough	0	0	0	0
Hatfield Township	246	6	0	240
Horsham	124	124	0	0
Jenkintown	0	0	0	0
Lansdale	1	1	0	0
Limerick	8	8	0	0
Lower Frederick	2	2	0	0
Lower Gwynedd	0	0	0	0
Lower Merion	240	15	0	225
Lower Moreland	2	2	0	0
Lower Pottsgrove	0	0	0	0
Lower Providence	10	8	0	2
Lower Salford	0	0	0	0
Marlborough	0	0	0	0
Montgomery	57	57	0	0
Narberth	4	4	0	0
New Hanover	2	2	0	0
Norristown	3	3	0	0

Municipality	Total	Detached	Attached	Multifamily
North Wales	0	0	0	0
Pennsburg	0	0	0	0
Perkiomen	0	0	0	0
Plymouth	46	0	46	0
Pottstown	21	9	12	0
Red Hill	0	0	0	0
Rockledge	0	0	0	0
Royersford	0	0	0	0
Salford	2	2	0	0
Schwenksville	3	0	0	3
Skippack	0	0	0	0
Souderton	2	0	2	0
Springfield	4	4	0	0
Telford	0	0	0	0
Towamencin	0	0	0	0
Trappe	0	0	0	0
Upper Dublin	0	0	0	0
Upper Frederick	0	0	0	0
Upper Gwynedd	1	1	0	0
Upper Hanover	2	2	0	0
Upper Merion	27	27	0	0
Upper Moreland	50	0	0	50
Upper Pottsgrove	0	0	0	0
Upper Providence	2	2	0	0
Upper Salford	0	0	0	0
West Conshohocken	0	0	0	0
West Norriton	0	0	0	0
West Pottsgrove	0	0	0	0
Whitemarsh	12	0	0	12
Whitpain	10	10	0	0
Worcester	39	39	0	0
<b>Totals</b>	<b>1,419</b>	<b>337</b>	<b>75</b>	<b>1,007</b>

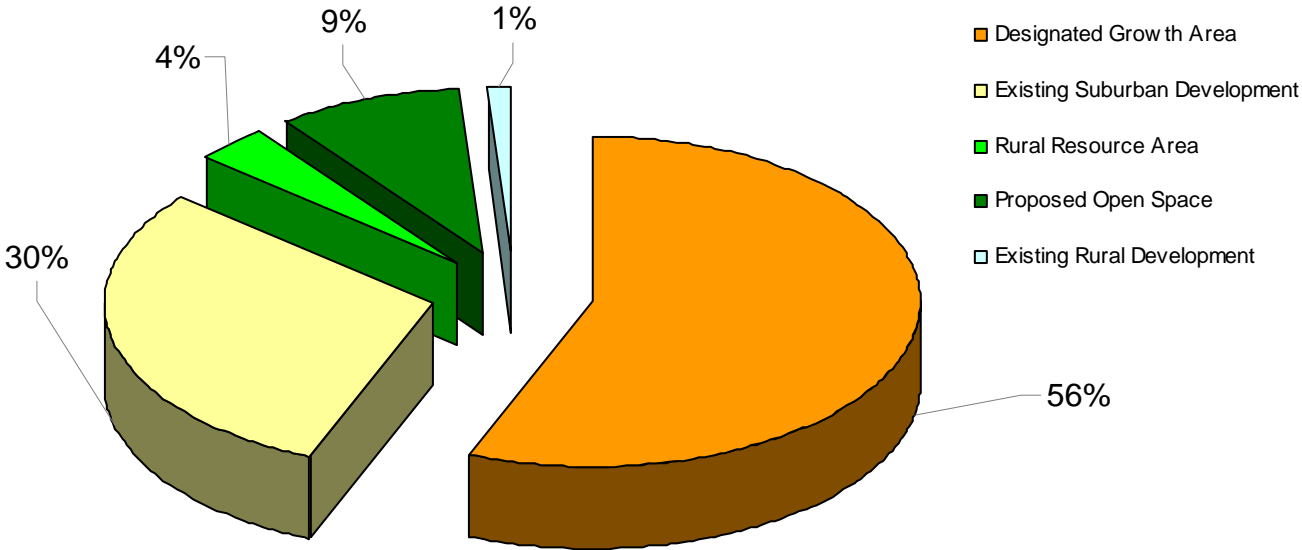


**Growth and Preservation Plan**

The overwhelming majority of housing units proposed in the county were located in designated growth areas or existing developed areas (87%). The County Comprehensive Plan recommends that only 5% of new housing units should be located in rural resource areas. In 2009, only 4% of housing units proposed were located within rural resource areas. However, 9% of units proposed were located in land identified as potentially protected open space in the Comprehensive Plan.

The County Comprehensive Plan also recommends that residential developments maintain a housing density of greater than one unit per acre in developed suburban areas and designated growth areas of the county. In 2009, over 99% of all units proposed in designated growth areas and developed suburban areas were proposed at densities greater than one housing unit per acre. The density of all new units proposed in designated growth areas was 7 units per acre and the density in developed suburban areas was 6 units per acre. The density in rural resource areas was 0.3 units per acre. Overall, the density of all newly proposed development in 2009 was 3 units per acre.

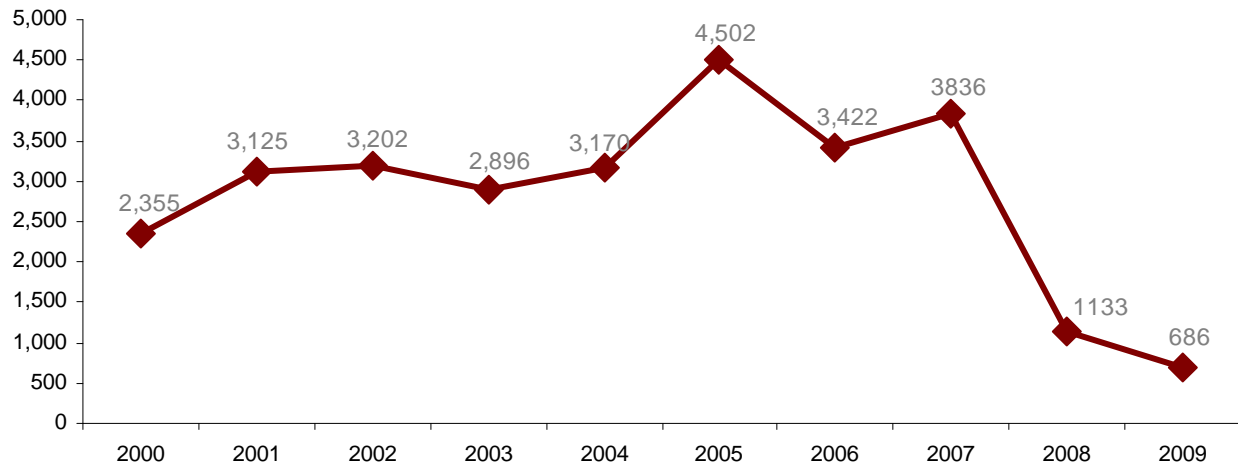
**Growth and Preservation Plan, Proposed Residential Units, 2009**



**Approved Units**

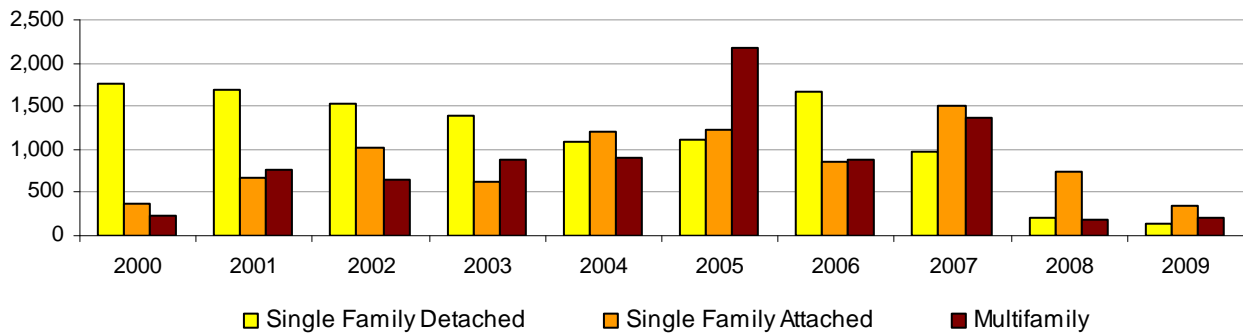
In 2009, there were a total of 686 residential units approved for construction. This was a 39% decrease from the 2008 total, but both of those totals pale in comparison to annual approvals over the rest of the decade. A slow economy and a tightening of credit markets has held down proposals, so any immediate recovery in the next year or two is unlikely.

**Approved Residential Housing Units, 2000 - 2009**



Single family attached units accounted for almost half of all units approved in 2009. This was the third year in a row that attached units have been higher than detached or multifamily units. Detached units have fallen the most over the last two years compared with previous levels. 192 of the approved units were age-restricted, accounting for 28% of all units.

**Approved Residential Units by Type, 2000 - 2009**





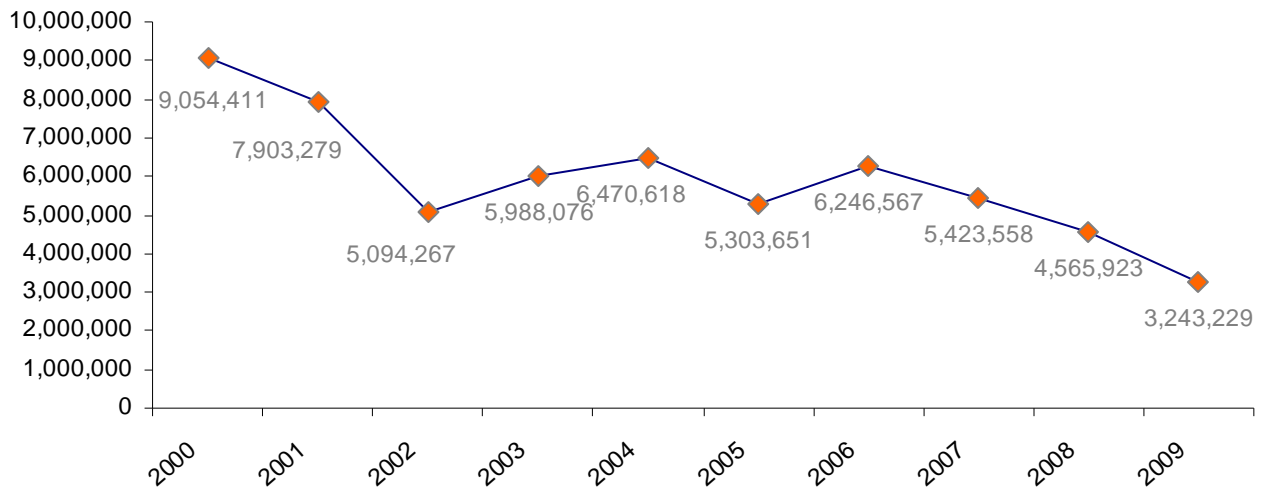
## Section Four Nonresidential Submissions

### Proposed Nonresidential Development

Nonresidential development includes retail commercial, office, industrial, and institutional uses. The institutional category includes hospitals, schools, skilled nursing facilities, and churches. Independent living units within continuing care facilities are not included in these totals, but are counted as residential units instead. A single continuing care facility can have any number of detached, attached, or multifamily units. If the facility includes an assisted living and common area, the square footage of that building and an estimate of the land area is included in our summation of institutional land development. Municipal land uses have their own separate land use category and are not included in institutional land use.

In 2009, the amount of nonresidential square feet proposed for development decreased by 29% compared to 2008. The total, 3.2 million square feet, is the lowest since records for nonresidential square footage began being compiled in 1988.

**Proposed Nonresidential Square Footage, 2000 - 2009**



### Nonresidential Proposals by Type

Commercial development proposals declined by 66% in 2009 to reach their lowest annual total since records for nonresidential square footage began being compiled in 1988. The slow economy appears to have hit the retail sector the hardest since the average amount of commercial space proposed during this decade was over 1.8 million square feet per year. The largest new commercial proposal in 2009 was the Commerce Corner shopping center in Upper Pottsgrove Township, followed by two hotel proposals in Upper Merion and Plymouth Townships.

Industrial square footage proposed almost doubled to over 1.1 million square feet in 2009. The increase was anchored by almost half of a million square feet proposed as part of the Babylon at Park Ridge development in Horsham Township and over 300,000 square feet under two proposals in Hatfield Township. These proposals, like many new industrial uses, consist of “flex” warehouse / office / light manufacturing capabilities. They can be similar to office uses but might consume a larger footprint and involve greater truck traffic depending on the amount of warehouse space.

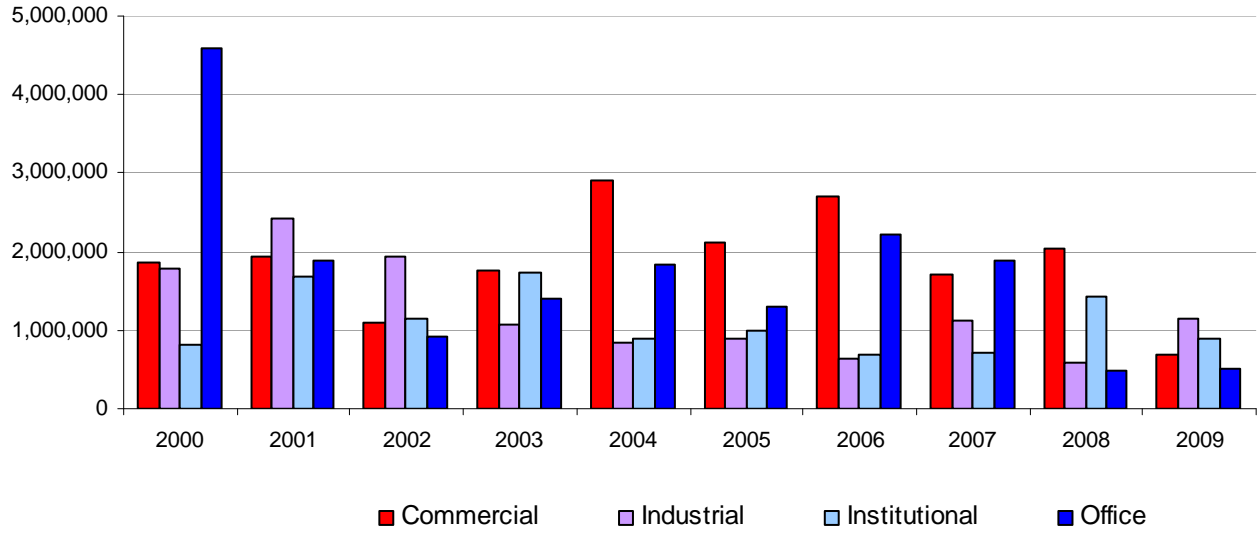
### Proposed Development of Nonresidential Square Footage, 2008 - 2009

Type	2009	2008	Change
Commercial	687,963	2,050,758	-66%
Industrial	1,150,364	591,988	94%
Institutional	902,674	1,441,195	-37%
Office	502,228	481,982	4%

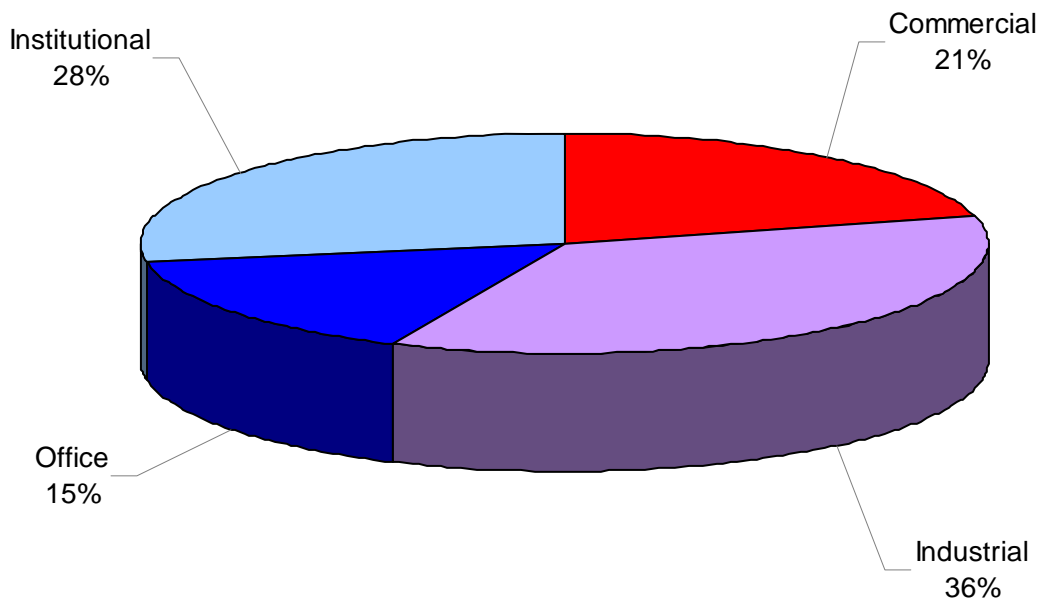
Institutional proposals accounted for the second largest sector in 2009, although the total square footage was about a third less than it was in 2008. Overall, it was below average for the last ten years, but nowhere near the lowest of years going back to 1988. The largest institutional proposal was over 300,000 square feet for the Lankenau Hospital expansion in Lower Merion Township followed by a nursing home proposed in Springfield Township. A number of public and private school developments also contributed toward the total proposed.

Office proposals accounted for the smallest sector of development submissions in 2009. They actually did increase slightly from the previous year, but both years were historically very low. The early 1990's included a couple of years that had lower numbers of submissions, but the past two years have been the lowest since then. The biggest office proposals in 2009 were at the Unisys Campus in Whitpain Township and a couple of lots at Exeter Crossing in Plymouth Township.

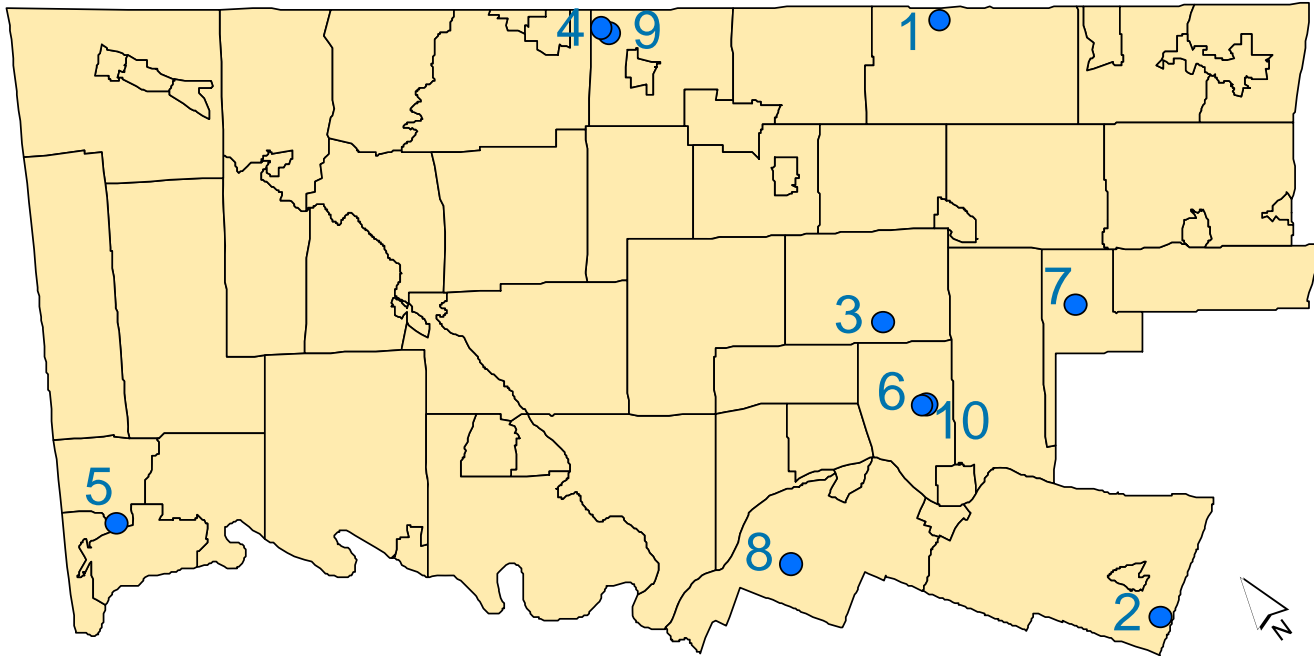
**Proposed Nonresidential Square Feet by Development Type, 2000 - 2009**



**Proposed Nonresidential Development by Type, 2009**



**Location of Top Ten Largest Nonresidential Proposals, 2009**

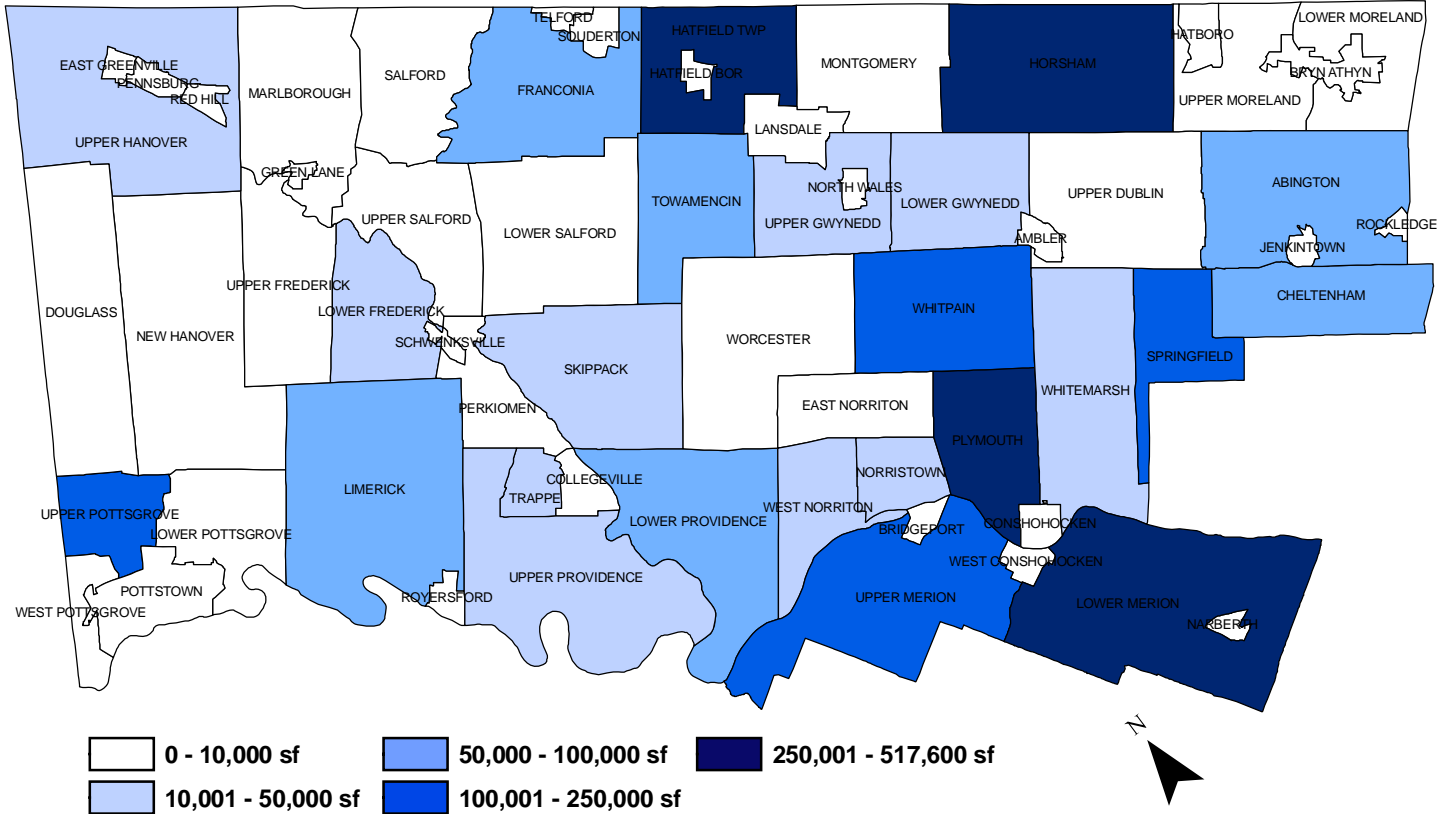


**Montgomery County Largest Residential Proposals, 2009**

	Development Name	Square Feet	Type	Municipality
1.	Babylon at Park Ridge	496,800	Industrial	Horsham
2.	Lankenau Hospital Expansion	316,900	Institutional	Lower Merion
3.	Unisys Campus Parcel "D"	237,500	Office	Whitpain
4.	Oak Tree Business Center	224,502	Industrial	Hatfield Township
5.	Commerce Corner	186,754	Commercial	Upper Pottsgrove
6.	Exeter Crossing Lots 4 & 5	143,000	Office	Plymouth
7.	Traditions of Springfield	138,368	Institutional	Springfield
8.	Lodgeworks	109,990	Commercial	Upper Merion
9.	Oak Tree Campus	102,690	Industrial	Hatfield Township
10.	Homewood Suites	92,400	Commercial	Plymouth

**Section Four: Nonresidential Submissions**

**Proposed Nonresidential Square Footage by Municipality, 2009**



**Municipal Nonresidential Square Footage Proposed for Development**

The table on the following page lists nonresidential square footage totals by type for each municipality. Horsham Township received over a half million square feet in proposals while Lower Merion, Plymouth, and Hatfield Townships followed with over 300,000 square feet proposed in each municipality. Whitpain and Upper Merion Townships also topped 200,000 square feet.

The countywide map above shows that many of the nonresidential proposals were located in the eastern and central portions of the county. This pattern was also noticed in the residential proposals map on page 15. As with residential proposals, this period of low development activity appears to show that there is greater interest in the more mature developed suburbs.



**Section Four: Nonresidential Submissions**

**Proposed Nonresidential Square Footage by Municipality, 2009**

Municipality	Total	Commercial	Industrial	Institutional*	Office
Abington	96,240	44,948	0	14,573	36,719
Ambler	2,045	1,395	650	0	0
Bridgeport	0	0	0	0	0
Bryn Athyn	0	0	0	0	0
Cheltenham	80,676	0	0	80,676	0
Collegeville	2,900	0	0	2,900	0
Conshohocken	0	0	0	0	0
Douglass	0	0	0	0	0
East Greenville	5,720	0	0	5,720	0
East Norriton	0	0	0	0	0
Franconia	87,615	0	53,829	33,786	0
Green Lane	0	0	0	0	0
Hatboro	6,720	3,360	0	0	3,360
Hatfield Borough	0	0	0	0	0
Hatfield Township	327,192	0	327,192	0	0
Horsham	517,600	0	517,600	0	0
Jenkintown	0	0	0	0	0
Lansdale	1,888	1,888	0	0	0
Limerick	54,969	15,069	31,600	5,420	2,880
Lower Frederick	12,598	12,598	0	0	0
Lower Gwynedd	36,450	6,764	0	15,013	14,673
Lower Merion	445,806	2,600	0	443,206	0
Lower Moreland	0	0	0	0	0
Lower Pottsgrove	0	0	0	0	0
Lower Providence	72,239	70,612	0	0	1,627
Lower Salford	0	0	0	0	0
Marlborough	0	0	0	0	0
Montgomery	6,304	6,304	0	0	0
Narberth	0	0	0	0	0
New Hanover	0	0	0	0	0
Norristown	27,393	0	27,393	0	0

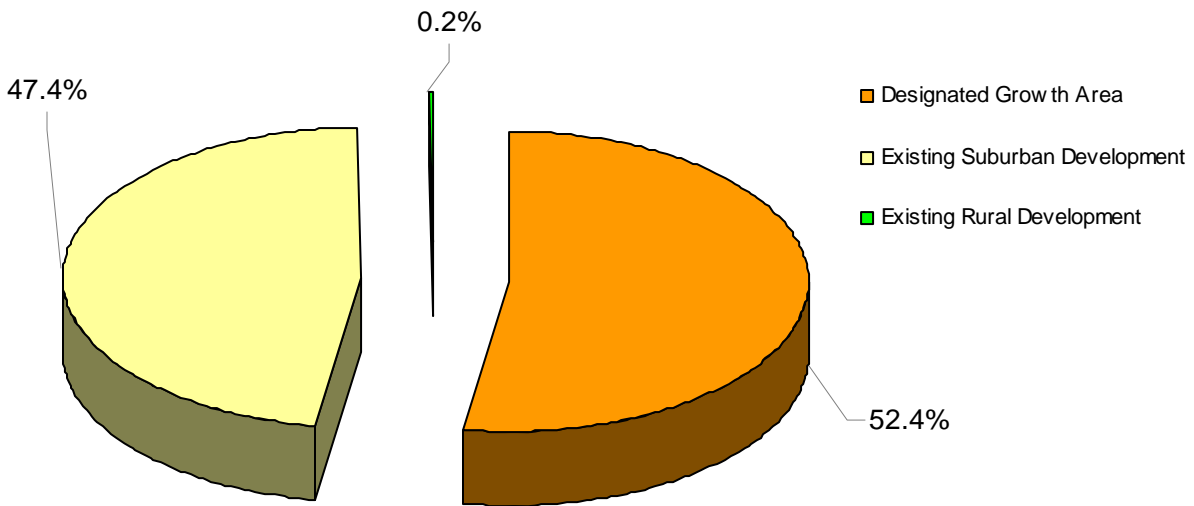
Municipality	Total	Commercial	Industrial	Institutional*	Office
North Wales	0	0	0	0	0
Pennsburg	0	0	0	0	0
Perkiomen	0	0	0	0	0
Plymouth	358,682	116,400	89,700	595	151,987
Pottstown	7,381	7,381	0	0	0
Red Hill	0	0	0	0	0
Rockledge	0	0	0	0	0
Royersford	0	0	0	0	0
Salford	1,034	0	0	1,034	0
Schwenksville	6,000	6,000	0	0	0
Skippack	25,150	6,650	18,500	0	0
Souderton	0	0	0	0	0
Springfield	232,805	5,400	0	227,405	0
Telford	0	0	0	0	0
Towamencin	75,516	17,680	0	15,986	41,850
Trappe	11,148	0	0	0	11,148
Upper Dublin	0	0	0	0	0
Upper Frederick	4,737	4,737	0	0	0
Upper Gwynedd	30,800	0	30,800	0	0
Upper Hanover	13,805	0	0	13,805	0
Upper Merion	201,123	171,423	29,700	0	0
Upper Moreland	0	0	0	0	0
Upper Pottsgrove	186,754	186,754	0	0	0
Upper Providence	23,400	0	23,400	0	0
Upper Salford	0	0	0	0	0
West Conshohocken	0	0	0	0	0
West Norriton	20,700	0	0	20,700	0
West Pottsgrove	0	0	0	0	0
Whitemarsh	19,668	0	0	19,668	0
Whitpain	240,171	0	0	2,187	237,984
Worcester	0	0	0	0	0
<b>Totals</b>	<b>3,243,229</b>	<b>687,963</b>	<b>1,150,364</b>	<b>902,674</b>	<b>502,228</b>

\*Includes institutional and elderly institutional proposals.

**Growth and Preservation Plan**

The County Comprehensive Plan recommends that new nonresidential development be located mostly in existing developed areas and designated growth areas. In 2009, all nonresidential proposed development was located in these areas. Development proposals were almost evenly split between designated growth areas and existing developed areas, with slightly more square footage found in the former category. There was no nonresidential development proposed in rural resource areas or proposed open space areas.

**Growth and Preservation Plan, Proposed Nonresidential Square Footage, 2009**

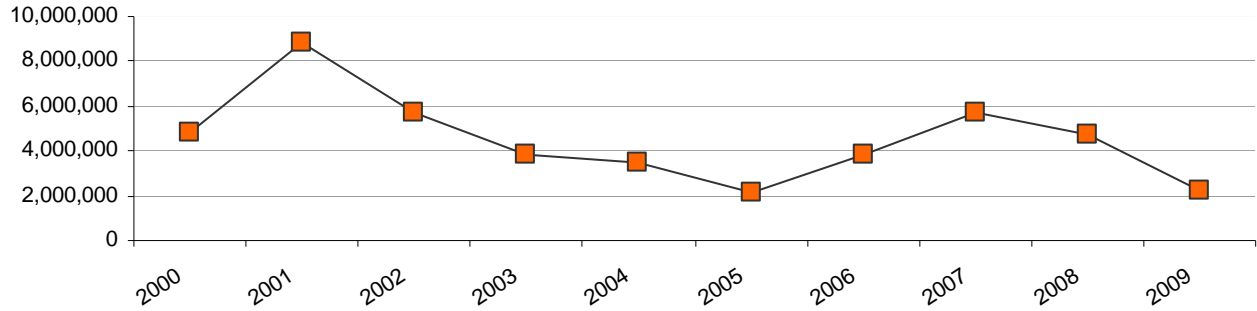


**Approved Nonresidential Development**

In 2009, over 2.1 million square feet of nonresidential development was approved. This was a 54% drop from the 2008 total, and it was roughly equal to the decade’s previous low approval total in 2005. Relatively low proposal rates indicate that a sudden turnaround in nonresidential activity should not be expected, but annual proposals, especially for nonresidential categories, can vary widely year to year based on the impact of only a few major development submissions.

The square footage approved for all types of nonresidential development declined from 2008. In 2009, commercial development accounted for almost half of all square footage approved but still fell by 52% from 2008. Office was the most dormant category this year in total square feet, and it also fell by 77% from its 2008 total.

**Total Nonresidential Square Feet Approved, 2000 - 2009**

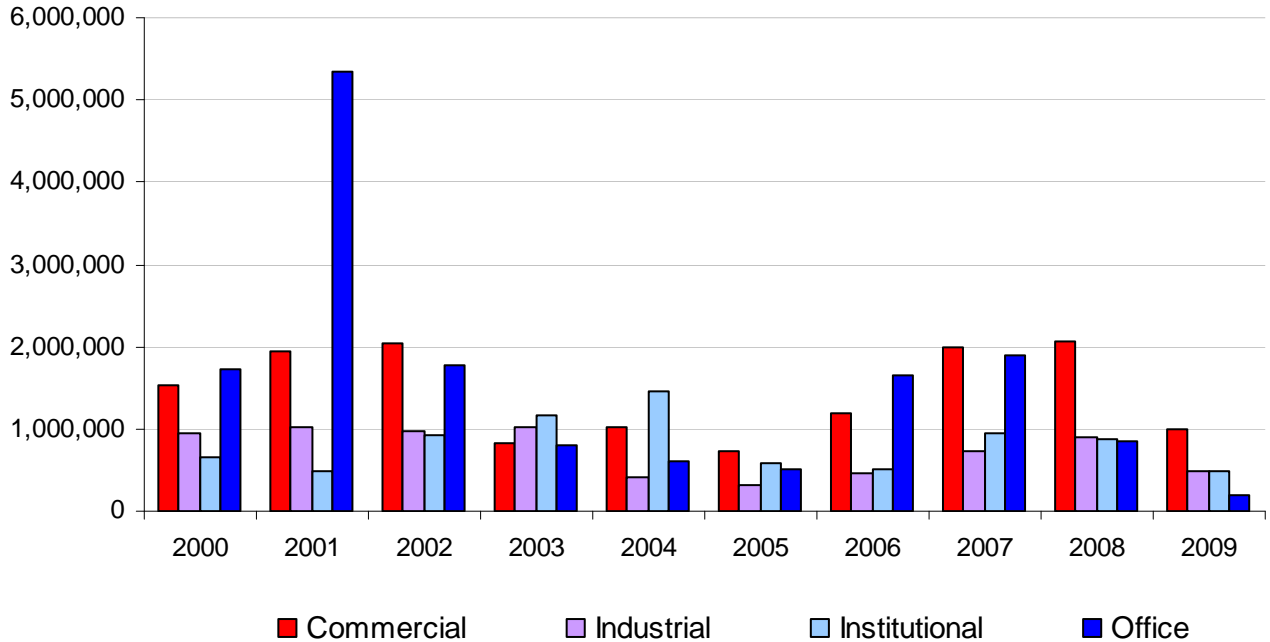


Year	Total Square Feet Approved
2000	4,826,098
2001	8,797,128
2002	5,719,086
2003	3,806,059
2004	3,488,357
2005	2,122,773
2006	3,795,560
2007	5,570,145
2008	4,685,520
2009	2,159,522
<b>Total</b>	<b>44,970,248</b>

**Approved Development of Nonresidential Square Footage by Type, 2008 - 2009**

Type	2009	2008	Change
Commercial	994,341	2,064,064	-52%
Industrial	491,775	910,312	-46%
Institutional	481,033	870,320	-45%
Office	192,373	840,824	-77%

**Approved Nonresidential Square Footage by Type, 2000 - 2009**



**Conclusion**

Proposed nonresidential square footage decreased for the third year in a row to the lowest annual total since county records began in 1988. However, not all categories of nonresidential development declined. Industrial square footage almost doubled from the year before. Office development also increased, but it was still at historically low levels. Geographically, much of the nonresidential activity was found in the eastern and central portions of the county. All nonresidential activity fell within designated growth areas or existing developed areas based on the County Comprehensive Plan.

Approved nonresidential development fell by more than half from 2008 to 2009. Commercial development accounted for almost half of all approved square footage, but it also declined by more than half from the year before.

## Section Five

### Zoning Activity

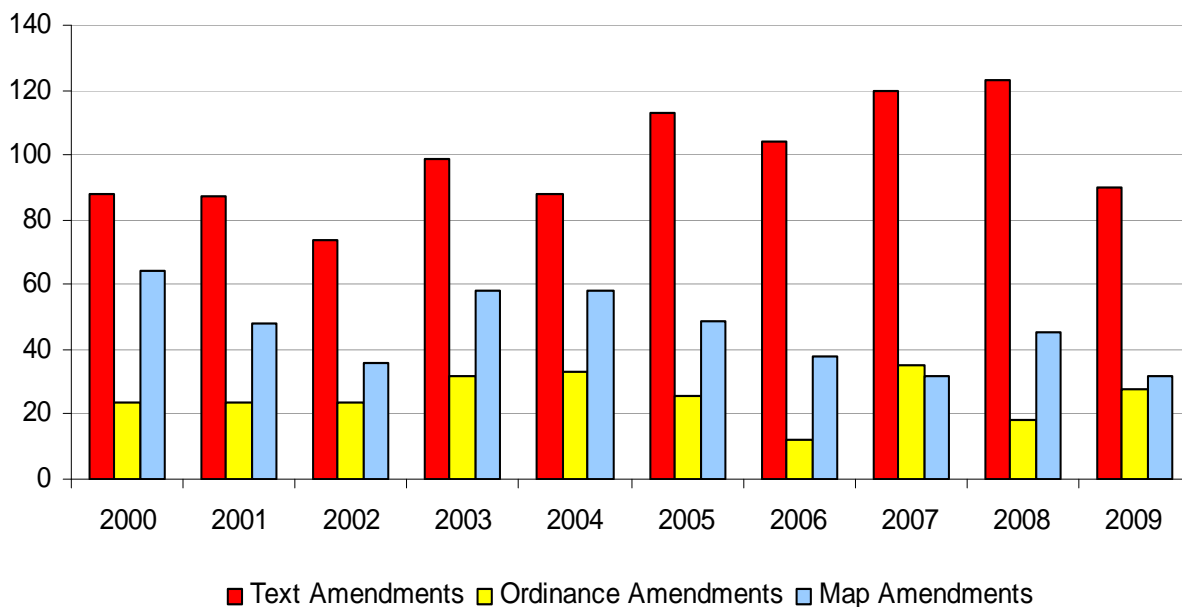
#### Zoning Amendments

All 62 municipalities in the county have officially adopted zoning ordinances, including zoning maps. In accordance with the Municipalities Planning Code (MPC), each township and borough is required to submit all proposed zoning ordinance or map amendments to the county Planning Commission for review. These amendments can be minor, involving small changes to the text of the zoning code, or major comprehensive amendments to the entire zoning ordinance.

The Planning Commission received 150 proposed amendments to local zoning text, maps and subdivision ordinances. This was less than the total from last year (186), and below the ten year average of 170.

In 2009, 28 zoning amendments were proposed to change significant portions of an entire ordinance, 90 involved less significant changes to a single district, and 32 involved map changes. Lower Merion Township had the most amendments of any municipality with 15.

**Montgomery County Proposed Zoning Amendments, 2000 - 2009**



**Section Five: Zoning Activity**

**Zoning Activity by Municipality, 2009**

Municipality	Total	Map Amend.	Ordinance Amend.	Minor Text Amend.
Abington	4	2	0	2
Ambler	1	0	0	1
Bridgeport	0	0	0	0
Bryn Athyn	0	0	0	0
Cheltenham	1	0	0	1
Collegeville	2	1	0	1
Conshohocken	1	1	0	0
Douglass	1	0	0	1
East Greenville	1	0	0	1
East Norriton	4	1	1	2
Franconia	2	0	0	2
Green Lane	1	0	0	1
Hatboro	0	0	0	0
Hatfield Borough	2	0	1	1
Hatfield Township	0	0	0	0
Horsham	5	3	0	2
Jenkintown	0	0	0	0
Lansdale	1	0	0	1
Limerick	2	0	1	1
Lower Frederick	0	0	0	0
Lower Gwynedd	3	1	1	1
Lower Merion	15	0	2	13
Lower Moreland	7	3	1	3
Lower Pottsgrove	0	0	0	0
Lower Providence	6	3	1	2
Lower Salford	4	2	0	2
Marlborough	2	1	1	0
Montgomery	4	0	0	4
Narberth	0	0	0	0
New Hanover	4	0	1	3
Norristown	9	0	2	7

Municipality	Total	Map Amend.	Ordinance Amend.	Minor Text Amend.
North Wales	2	1	0	1
Pennsburg	0	0	0	0
Perkiomen	0	0	0	0
Plymouth	3	0	1	2
Pottstown	3	0	0	3
Red Hill	3	0	2	1
Rockledge	0	0	0	0
Royersford	0	0	0	0
Salford	0	0	0	0
Schwenksville	3	0	0	3
Skippack	1	0	1	0
Souderton	1	0	1	0
Springfield	1	0	0	1
Telford	1	0	1	0
Towamencin	5	0	1	4
Trappe	0	0	0	0
Upper Dublin	3	0	1	2
Upper Frederick	3	1	2	0
Upper Gwynedd	2	2	0	0
Upper Hanover	1	1	0	0
Upper Merion	3	2	0	1
Upper Moreland	8	0	0	8
Upper Pottsgrove	2	0	0	2
Upper Providence	4	1	1	2
Upper Salford	1	0	0	1
West Conshohocken	2	1	1	0
West Norriton	2	1	0	1
West Pottsgrove	2	1	1	0
Whitemarsh	7	2	1	4
Whitpain	5	1	2	2
Worcester	0	0	0	0
<b>Total</b>	<b>150</b>	<b>32</b>	<b>28</b>	<b>90</b>

