

WHITEMARSH TOWNSHIP OPEN SPACE COMMITTEE
OPEN SPACE PRESERVATION 2006-2017

After public hearings and input, and favorable comment by the Montgomery County Open Space Committee, the current Whitemarsh Township Open Space Plan was formally adopted by the Board of Supervisors on December 21, 2006. The Plan noted that, unique among inner-ring Philadelphia suburbs, Whitemarsh enjoyed an unusually large amount of undeveloped open space. This consisted of State, County and Township parkland; six golf courses; state owned historical properties; and privately owned farmland and large estates. These open space resources totaled about 4,000 acres, nearly a third of the Township's 15 square miles.

In the introductory section, the Plan stated:

“Looking ahead 20 years, Whitemarsh envisions itself as an oasis of green amid the predominant suburban development of southeastern Montgomery County. The Township will be appreciated for its high quality of life, the result of its large expanse of open space and comprehensive network of trails and greenways connecting the region’s parks, recreational facilities, natural areas, and social and cultural resources.”

The Goals section provided:

- 1. Preserve 75% of the Townships remaining open space ...***
- 5. Establish a permanent substantial dedicated revenue stream to support the Township’s open space vision.***

So called “Act 153” originally adopted by the Pennsylvania legislature in 1968 authorizes municipalities to impose special real estate or income taxes to be used solely for acquiring “open space benefits” which includes, among other things, preservation of undeveloped land, provided that the tax is authorized in a referendum approved by the voters. In the November 2006 election, 62% of those voting approved a ¼ of 1% tax on earned income and In December 2006 the Board of Supervisors enacted the tax effective January 1, 2007.

In the 11 year period between January 1, 2007 and December 31, 2017, a total of nearly \$18 million in Act 153 taxes has been collected by the Township. During this same 11 year period, the Township has spent nearly \$20 million to acquire

properties and/or easements protecting approximately 250 acres in multiple transactions. In addition, the Township's action has leveraged protection of approximately 200 additional acres funded from other sources. All of this has been accomplished without any impact on the Township's operating budget.

In 2009, after public hearings and comment, the Board of Supervisors adopted the **"2009 Township-wide Pedestrian and Bicycle Network Plan"**, a comprehensive blue print for a Township-wide plan which would provide bicycle and pedestrian connections between the Township's parks and open spaces. The cost of completion was estimated at just under \$10 million, much of which would be eligible for funding with Act 153 resources.

In 2013 Act 153 was amended to broaden the purposes for which Act 153 funds may be used, including payment of transaction fees and expenses, and, most importantly, to spend a portion **"to develop, improve, design engineer and maintain property acquired pursuant to this act for an open space benefit or benefits"**. This will now permit the Township not only to protect and preserve additional open space, but also to fund open space amenities such as trails and parks, as well as the maintenance of properties preserved with Act 153 funds.

In addition, through the Township's Flood Prone Property Acquisition Policy adopted in April of 2012, the Township is able to utilize Act 153 funds to preserve lands that can be used for stormwater management.

Funded primarily with Act 153 funds, during the last 11 years the Township has made substantial progress towards the Open Space Plan's goals, all accomplished without burdening the operating budget. The following are open space purchases made since the inception of the Act 153 funds:

- **2008: East 33** (\$42,879 – 31 acres) – Per recommendation of the 2006 Open Space Plan, this property abuts a portion of Fairmount Park, which in turn is contiguous to the Schuylkill Center for Environmental Education.
- **2011: Gambone Open Space** (Wells and Cedar \$1,819,231 – 23 acres) – To provide contiguous open space adjacent to Cedar Grove Park as recommended by the Open Space Plan.
- **2012 – 2014: FEMA Properties** – The Township used Act 153 funds to purchase these flood-prone properties, then converted them to open space, and secured reimbursement from FEMA for the costs.

- 607 Stenton and 6005 Valley Green \$769,016 – 2014
- 7004 and 7008 Mather’s Lane \$747,458 – 2012/2013
- **2013: Christie Circle** (4134 Christie Circle \$452,190) – This property was prone to repetitive flooding, therefore acquisition of the property allowed the township to demolish the structure and utilize the property for stormwater management for the surrounding neighborhood.
- **2016: Joshua Hill** (\$2 Mil – 12 acres) - This parcel is near the 50 acres of Kline Park dedicated to the Township by National Label as well as the 7.5 acres of open space being dedicated to the Township as part of The Oaks at Lafayette Hill townhouse development.
- **Erdenheim Farm.** 450 acre Erdenheim Farm is the centerpiece of 2000 acres of nearly contiguous open space from Fairmount Park in Philadelphia to Fort Washington State Park in Whitemarsh. It has been in continuous agricultural use since the days of William Penn. In a series of complex transactions completed in 2008 and 2009, the entire Farm has been protected from all but the most limited development. This included the purchase by the Whitemarsh Foundation of the 98 acre “Angus Tract” and 90 acres of the “Sheep Tract” for a total of \$26 million, plus transaction costs of about \$1.4 million.

Expanding on Erdenheim Farm, of the purchase price, Whitemarsh Township contributed just over \$10 million with borrowed funds for a 25 year period. The Township made the Final \$220,000 Principal Payment for the Angus Tract on November 27, 2017. Debt Service paid from Act 153 funds in the Open Space Fund has reduced the principal balance for the Sheep Tract loan down to \$6,510,420 as of December 31, 2017. The Township’s Open Space Fund Budget is scheduled to provide for \$500,000 per year average Debt Service through April 2032 to retire the Sheep Tract obligation. The Sheep Tract Notes Payable are subject to a variable rate loan. The present interest rate on the Sheep Tract Notes are 1.6188%. The Foundation’s purchase of the Angus and Sheep Tracts leveraged the acquisition of the remainder of the Farm by the McCausland family, with the result that the entire farm is now protected by restrictions preventing all but the most limited development.

The 14 acre Dixon Meadow Preserve, a nature preserve and stormwater retention facility constructed by the Foundation on the Angus Tract, is open to the public and features an 800 ft. boardwalk built and maintained by the Township. The Preserve has been enjoyed by hundreds, if not thousands of area residents and is considered a birding “hot spot”. In addition, the foundation with private funding has restored a 19th century farmhouse on the Angus Tract which features educational programs, including those sponsored by the Township’s Park and Recreation Department. Furthermore, Montgomery County is planning to construct public trails on the Sheep Tract and other portions of the Farm, to provide critical linkages with the Green Ribbon Trail along the Wissahickon Creek and the in-process Cross County Trail.

Without the critical Township financial support afforded by Act 153, it is probable that the Farm would not have been preserved and likely would have been lost to residential development.

Act 153 revenues are now approaching \$2 million annually. About \$500,000 annually will be needed to retire the Erdenheim Farm debt, expected to be retired in 2032. This leaves available \$1,500,000 in annual Act 153 Revenues for the acquisition and enhancement of open space. In combination with \$7,000,000 in open space funds held in reserve, the annual revenue stream gives the Township the financial capacity to accelerate the acquisition, protection and maintenance of open space and open space amenities. This will enable the Township to build upon the significant progress accomplished in the 12 years since the Open Space Plan was adopted. Not only will Act 153 provide cash flow to fund open space and open space benefits, but provide debt service for borrowings when need or opportunity arises.

The Open Space Committee appreciates and thanks the Board of Supervisors for its vision and leadership in preserving and protecting open space, and encourages the Board to utilize the significant financial resources provided by Act 153 to continue to implement the Open Space and Pedestrian and Bicycle Network Plans.

Whitemarsh Township Open Space Committee
January 24, 2018