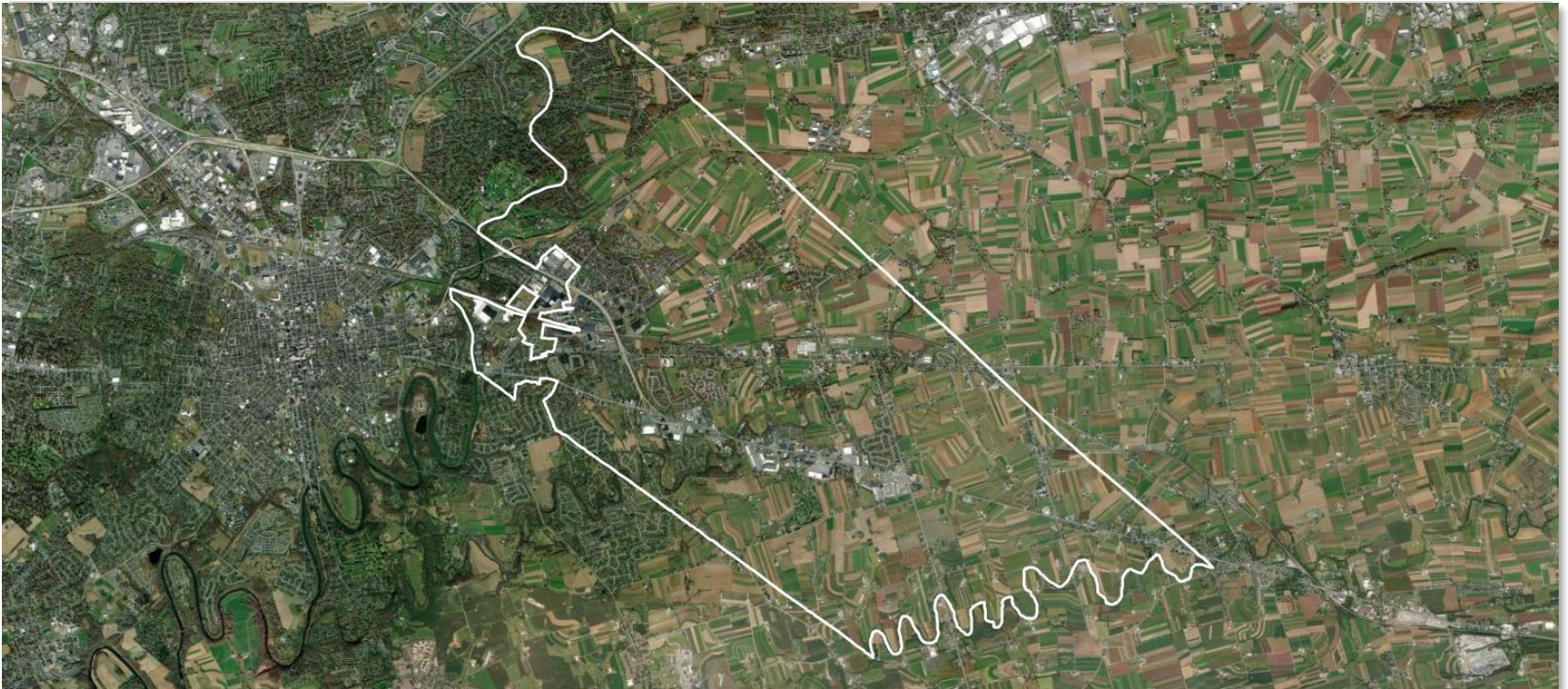




East Lampeter Township HOUSING NEEDS STUDY

East Lampeter Township, PA

October 3, 2023



ECONOMIC AND REAL ESTATE ANALYSIS FOR SUSTAINABLE LAND USE OUTCOMES™

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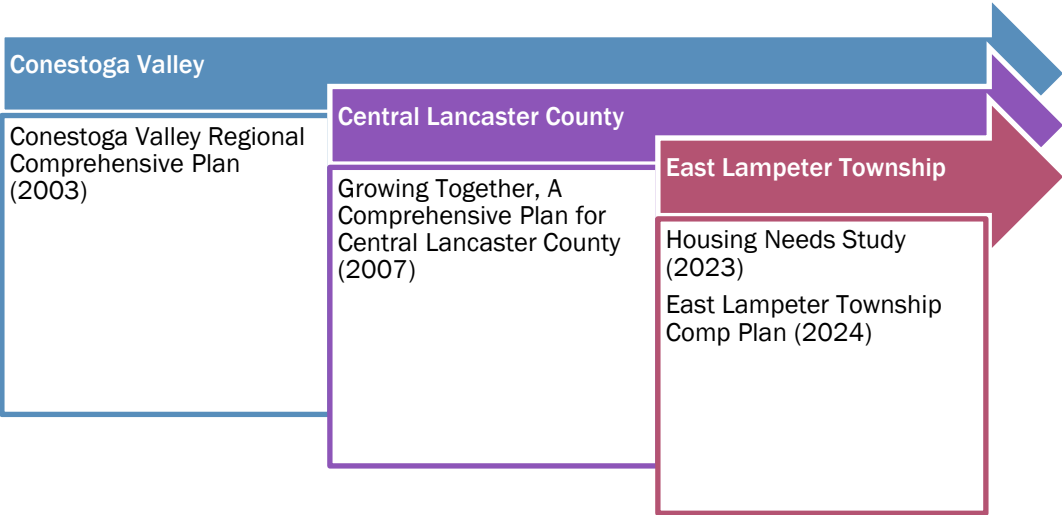
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Project Background: Background & Purpose

East Lampeter Township participated in two previous regional comprehensive plans. The Conestoga Valley Regional Comprehensive Plan adopted in 2003 was a joint effort between East Lampeter, Upper Leacock, and West Earl Townships as well as Conestoga Valley School District. East Lampeter Township also joined the 2007 Growing Together, A Regional Comprehensive Plan for Central Lancaster County as a member of the Lancaster Intermunicipal Committee.

Each of these comprehensive plans served East Lampeter Township in creating zoning, planning, and development policies which were reviewed per the requirements of the Pennsylvania Municipalities Planning Code. Township staff considers the plans every five years to ensure goals and objectives continue to effectively drive Township policy.

Since the last comprehensive planning processes in 2003 and 2007, a great deal has changed in housing within East Lampeter Township, Lancaster County, Pennsylvania, and the nation.



Project Background: Scope

This Housing Needs Study will serve as a precursor to an updated comprehensive planning process for East Lampeter Township. To create a solid understanding of housing and demographics for the comprehensive planning process update, this study provides an analysis of current demographic, economic, and housing market conditions in the township, as well as a detailed housing supply and demand forecast to direct future housing policy. As illustrated below, our market analysis and outreach facilitates a strong foundation upon which to identify market-feasible housing strategies for East Lampeter Township.

Housing Initiatives Review



- ☐ Kick-Off Meetings, Data Collection & Tour
- ☐ Review of Current Zoning Policies

Market Analysis



- ☐ Demographic & Labor Trends Analysis
- ☐ Residential Real Estate Market Analysis
- ☐ Housing Pipeline and Projections
- ☐ Comparative Analysis of Township Housing Metrics
- ☐ Redevelopment Opportunities
- ☐ Identification of Financial Strengths & Challenges of Local Housing
- ☐ First Public Meeting

Outreach



- ☐ Online Survey of Large Employers' Employees
- ☐ Interviews with Residential Realtors
- ☐ Interviews with Area Housing Organizations
- ☐ Interviews with Area Private Real Estate Developers
- ☐ Examination of Implications of Gaps in Housing Supply and Demand
- ☐ Second Public Meeting

Strategic Recommendations



- ☐ Development of Implementation Strategies & Recommendations
- ☐ Production of Draft & Final Report

Key Questions Answered



Does the supply of housing match demand from households and commuting workers?

How is demand for housing changing?



What new housing is being built or planned?

How much buildable land exists within the urban growth boundary?



Where does current zoning and public services allow for new multifamily housing development?

Are there vacant housing units in need repair?



Is there sufficient affordable housing for renter households?



What type of housing is most in demand?



Can households afford to purchase a home?

Key Findings: Market Findings

Housing inventory is tight.

- In 2021, the vacancy rate among ownership and rental units within the township was extremely tight (1.0 and 2.2 percent, respectively).
- In 2020, 13,840 workers commuted into the township to work, representing potential unmet housing demand, as some may prefer to live closer to work if affordable workforce housing were available.

There is a mismatch between bedroom unit counts and household size.

- The share of one- and two-person households, combined (53 percent) in East Lampeter is much higher than the share of studios, and one- and two-bedroom units, combined (35 percent). Some individuals living alone in the township might prefer to live in smaller, more affordable one-bedroom units, if such were available.
- The Rockvale Redevelopment project is the only pending residential project that includes smaller one-bedroom units in its apartment mix.

Key Findings: Market Findings (continued)

The economy and housing demand is shifting.

- Stronger growth in non-family households will likely continue to drive demand for smaller housing options.
- Growth in the health care and social assistance sector (the top sector by new job growth in the county) will likely increase demand for middle-income residential properties in the county, which could be accommodated within township's growth area.
- Growth in the accommodation and food services sector (the second top sector by new job growth in the county) will likely increase demand for affordable rental housing options.
- The manufacturing sector (the top sector by employment share in the township) has been losing jobs over the past two decades, resulting in reduced incomes and job opportunities for primary workers.

There is net demand for 720 more residential units by 2028.

- Largely due to existing pent-up demand from primary workers who commute into the township (94 percent of township workers) and replacement of physically obsolescent housing, there is currently a net demand for approximately 700 residential units in East Lampeter Township. By 2028, there will be an estimated net demand for approximately 720 residential units.

Key Findings: Market Findings (continued)

Affordable housing is beyond reach for individuals and families.

- According to Census data, in 2021, 42 percent of total household expenditures in East Lampeter were dedicated to housing costs (including rent or mortgage payments, property taxes, and utilities).
- According to 2021 Census data, 41 percent of all renter households in the township paid more than 30 percent of their monthly household incomes on rent and were considered rent-burdened.
- According to the Lancaster County Housing and Redevelopment Authority, there are only 50 to 60 units occupied by Section 8 certificate holders in the township.
- From 2017 to 2023, the total homeless population in the county increased from 321 to 526 persons, or by 64 percent.
- Compared to adjacent municipalities, East Lampeter Township has a relatively high ratio of median home value to median household income (4.4), suggesting home affordability, even for middle-income households, is challenging.
- According to Home Mortgage Disclosure Act data, in 2022, 54 percent of the township's denied home purchase and refinance loan applications were due to insufficient debt-to-income (DTI) ratios, a share higher than that in the county (36 percent), confirming that some potential homebuyers in the township have insufficient incomes to qualify for home loans.
- Rising interest rates can reduce a household's purchasing power and make it more difficult to purchase a home. Likely due to increasing interest rates, the number of loan applications in the township decreased dramatically from 2021 to 2022, according to HMDA data.

Key Findings: Market Recommendations

Address “other vacant” housing.

- Given the large number of vacant units in the township characterized as "other vacant" (146 units) - units that do not fall into standard vacancy classifications (e.g., owner that does not want to rent or sell; or house is being used for storage, being foreclosed upon, or being repaired or renovated) - East Lampeter should inventory vacant units, to determine the share of units needing repair, to make them marketable for rent or sale. Given the tight inventory of available ownership and rental units in the township, such a strategy could yield a critical number of units at a relatively affordable investment.

Develop new housing on remaining buildable land.

- The development of additional single-family housing, townhomes, and multi-family housing on buildable land located near existing bus service and parks in the township could appeal to existing cost-burdened households.
- According to buildable land data identified in the current Comprehensive Plan for Lancaster County and zoning data provided by East Lampeter Township, there are 614 acres of buildable land in East Lampeter Township, with 587 acres zoned to allow residential development. Just 99 acres of buildable land allows multifamily by right with just 39 of these acres located on large parcels of four or more acres in size.

Key Findings: Interviews

4ward Planning conducted email and telephone outreach to relevant regional, county, and local housing organizations, private real estate developers, and residential real estate professionals for their perspectives of the housing market in East Lampeter Township. Along with supplementing our market analysis findings, those interviewed (see Appendix for details) offered the following salient, subjective feedback – presented here as strengths, challenges, and opportunities.

Strengths

- The Township is collaborative and open to finding residential development solutions, offering positive, working relationships with Township staff.
- There is a strong, county-wide network of affordable housing-related organizations and partners.

Challenges

- There is not enough affordable housing.
- It is challenging to find developable land in East Lampeter Township, but not more so than in other townships.
- The municipal approval process can be cumbersome, but not more so than in other townships.
- There are some negative community perceptions of affordable housing in East Lampeter Township.
- Infrastructure inadequacies (e.g., sewer, road) must be addressed, even if zoning is amended to support more residential product.
- High traffic on major routes, particularly Route 30, must be addressed.
- Governmental regulations beyond the Township's control can restrict affordable housing development.

Key Findings: Interviews (continued)

Opportunities

- Streamline the housing review process.
- Revisit zoning codes, offering flexibility in creation of mixed-use and rentals. With shifting demographic trends reshaping housing needs, there is more demand for townhomes, duplexes, and multi-family units, as well as auxiliary living units. A mix of housing options will increase area affordability.
- Encourage redevelopment and infill by allowing new uses where infrastructure already exists but avoiding overhaul of established neighborhood character.
- Take advantage of the vacant property program through the County's Land Bank Authority.
- Engage new partner organizations (e.g., Habitat for Humanity, local church communities) in the creation of affordable housing.
- Spearhead a public education campaign addressing density and affordable housing.
- Address and mitigate infrastructure deficiencies.
- Include walkability, bike accessibility, and green space in redevelopment plans.



COMPREHENSIVE PLAN REVIEW

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Conestoga Valley Regional Comp Plan

The 2003 *Conestoga Valley Regional Comprehensive Plan* includes East Lampeter Township, Upper Leacock Township, and West Earl Township, along with the Conestoga Valley School District (which encompasses all three municipalities). In terms of housing, the plan's vision supports a region that will continue to feature a variety of residential types including densities to control urban sprawl and preserve agriculture, infill development to fit existing characteristics, and a mix of housing types to provide price and style choices for the community.

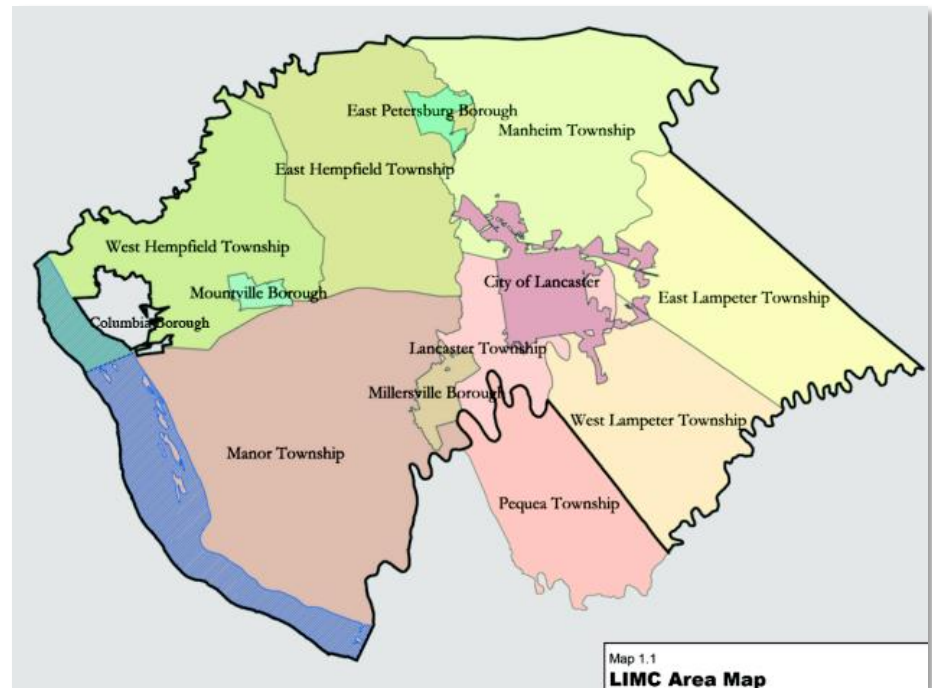
Housing Goal: To provide a range of residential development and housing choices to existing and future residents of the Conestoga Valley.

- Provide a range of residential development styles including preservation of traditional villages and crossroad communities, subdivisions in suburban settings, new mixed-use developments, and infill development to fit existing characteristics.
- Provide a range of housing types, values, and styles to meet the needs of existing and future residents of the region.
- Provide affordable housing to accommodate the needs of residents of all ages, including but not limited to seniors, persons with disabilities, single households, and new families.
- Continue to monitor housing needs through the review of new Census data and housing reports as they become available.

Central Lancaster County Comp Plan

Growing Together: A Comprehensive Plan for Central Lancaster County, Pennsylvania is a multi-municipal comprehensive plan commissioned by the Lancaster Inter-Municipal Committee (LIMC) and encompassing 11 municipalities in Central Lancaster County, including East Lampeter Township. The plan portrays a vision and comprehensive framework to guide decision-making over the next 25 years. The housing chapter recommends policies and strategies designed to provide diverse housing choices in terms of owning and renting throughout the region and for all income levels. Recommendations focus on incentives and programs and on the implementation of regulatory tools to enhance the availability of diverse housing options.

- **Housing Goal: Affordable, diverse housing choices across all income ranges will be made available to encourage homeownership and rental properties, and to further smart growth.**



Central Lancaster County Comp Plan (continued)

Objectives

Create a regional program of economic and development incentives to encourage a balanced supply of housing of diverse prices in all communities.

Expand funding sources and develop joint funding strategies among public, private, and philanthropic entities to increase the supply of fair share and affordable housing.

Use zoning and other regulatory tools to encourage the creation of mixed use, mixed type housing.

Use zoning and other regulatory tools to encourage adaptive reuse and infill development.

Encourage mixed income housing.

Encourage homeownership.

Ensure accessible and affordable housing options.

Encourage provision of safe, decent, and sound rental housing for a broad range of price and occupants.

Improve the perception of subsidized housing.

Ensure proximity between housing and employment opportunities.

Strategies

- Streamline the development approval process.
- Reduce or waive fees for projects that provide affordability and price diversity.

- Organize a housing summit to address funding strategies and housing opportunities.

- Expand the zoning ordinances to include other forms of compact development options.
- Allow more acreage and more zoning districts to have compact development options.
- Incorporate provisions for accessory apartments into zoning ordinances.

- Expand nonresidential regulations to allow for residential adaptive reuse.
- Fill gaps in existing neighborhoods with infill housing.
- Encourage the retrofit of underperforming shopping centers.

- Require an affordable housing component in larger residential developments.

- Coordinate housing construction with agencies such as Habitat for Humanity.

- Allow for smaller lots that enhance affordability.
- Provide incentives to builders and developers to build affordable units.
- Minimize elements not conducive to providing affordable housing.
- Maximize elements conducive to providing affordable housing.

- Permit rental units based on minimized habitable floor area.

- Educate the public about subsidized housing.

- Search for places to improve the housing/jobs balance.

PLACES2040 – A Plan for Lancaster County

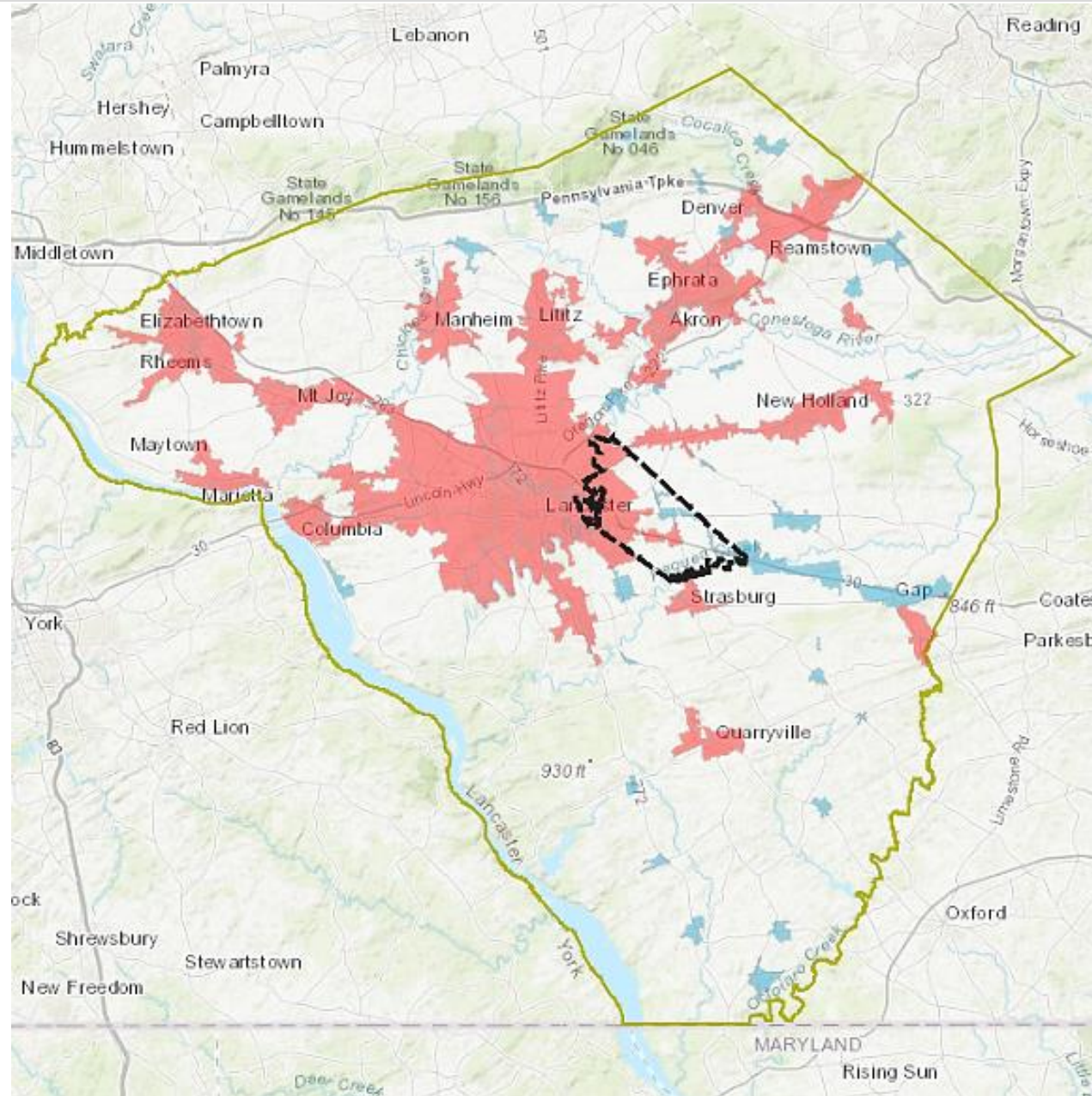
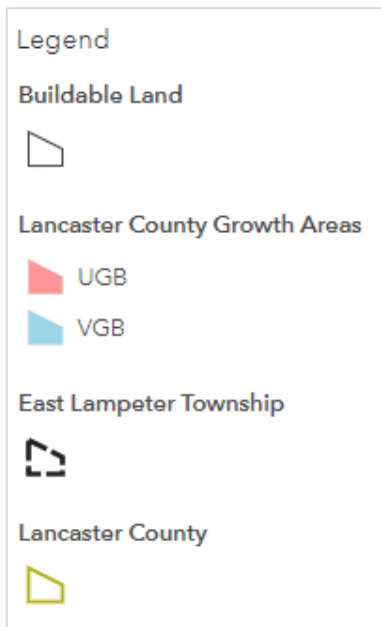
Adopted in 2018, *PLACES2040 – A Plan for Lancaster County, PA* is the current Comprehensive Plan for Lancaster County. The Plan prioritizes redevelopment and infill in priority growth areas in order to leverage previous investment by building in areas already served by sewer, water, and transportation.

As mapped on the following page, the plan identified the following two priority growth areas that have some existing or planned infrastructure (sewer service, and sometimes water) to support growth:

- **Urban Growth Areas (UGAs)** – These areas will accommodate the majority of the county’s population and employment growth. UGAs surround or are adjacent to the city or borough(s). Eighty-five percent of new growth will be targeted to UGAs with an average density of 7.5 net dwelling units per acre.
- **Village Growth Areas (VGAs)** – These communities will accommodate some rural growth. VGAs surround or are adjacent to a village outside UGAs. The map shows VGAs that are proposed to exist by 2040. Average density of 2.5 net dwelling units per acre will be set for VGAs.

Also mapped on the following page, the *Future Land Use and Transportation* map identifies “Buildable Land” inside growth areas. Buildable Land was generated by the county by first identifying “undeveloped” land and then removing certain land coverage of certain environmental constraints (wetlands, steep slopes, and 100-year floodplains). Buildable Land within the township is analyzed in more detail within the Zoning Review and Residential Development Opportunities sections.

PLACES2040 – A Plan for Lancaster County (continued)



MARKET ANALYSIS

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Methodology: Demographic & Labor Trends Analysis

Using a combination of published government data (U.S. Census, American Community Survey) and proprietary analysis software (ESRI Community Analyst), 4ward Planning collected socio-economic trend data (e.g., population, households, household income, and housing type) for East Lampeter Township, the primary market area (representing a 20-minute drive-time from the center point of East Lampeter Township), as well as Lancaster County, for comparative purposes. 4ward Planning also examined poverty rates, and elderly and disabled populations, and identified concentrated areas of poverty. Additionally, we analyzed income distribution and homeownership rates by household type (family versus non-family). Demographic data provided by ESRI is displayed for 2010, 2023 (estimated), and 2028 (projected).

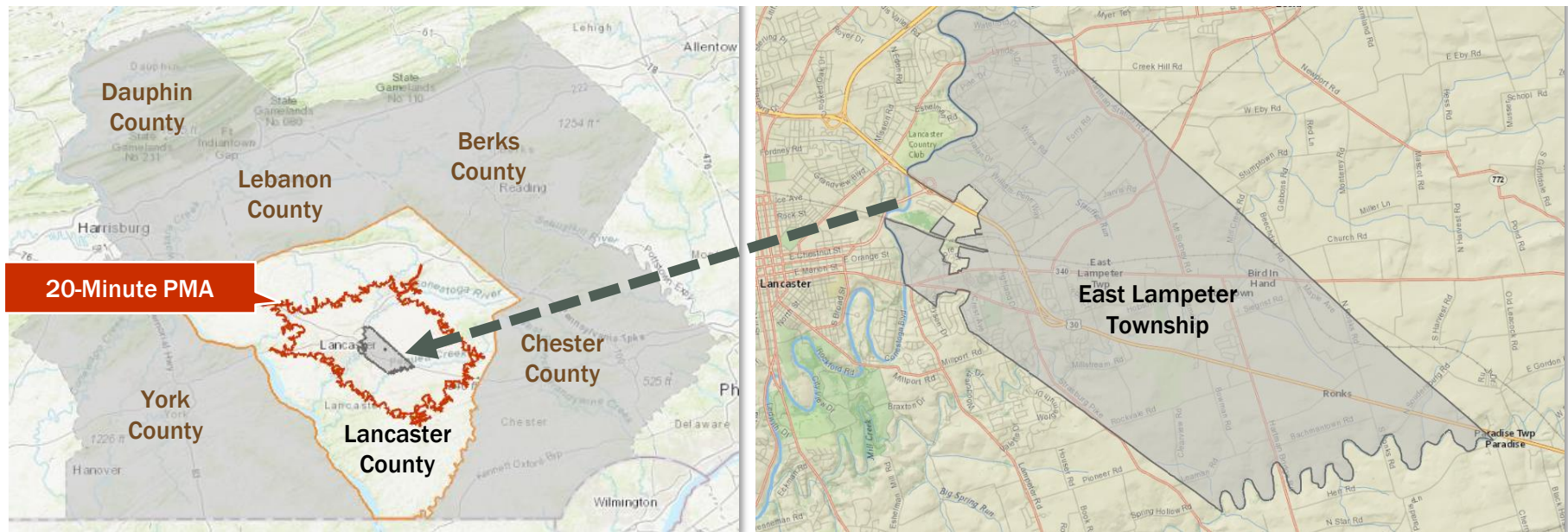
As labor and housing markets are inextricably linked, we conducted a thorough examination of labor and industry trends within Lancaster County, and for comparison purposes, the five Pennsylvania counties surrounding Lancaster County (York, Dauphin, Lebanon, Berks, and Chester). Specifically, we identified the top six industries by employment, within the county and region, and identify where employment centers exist within the county (e.g., concentrations of employment which will typically indicate where housing demand exists). This analysis enables us to determine employment growth and how it might influence housing demand in the township.

Based on data provided by the Census Bureau's OnTheMap tool, 4ward Planning identified employment center locations and worker travel patterns within East Lampeter Township. Further analysis of commuting patterns and travel time to work are evaluated using Esri and the American Community Survey, enabling a better understanding of current pent-up housing demand from commuting workers and the need for workforce (affordable) housing.

Methodology: Study Areas

The following study areas are examined during the demographic and labor trends analysis:

- **East Lampeter Township:** As defined by Census township boundaries. Where data for the township is not available, Public Use Microdata Areas (PUMAs) 03501 representing *Lancaster County--Lancaster City, East Lampeter, Lancaster & West Lampeter Townships* is utilized.
- **20-Minute PMA:** Primary market area or PMA is represented by a 20-Minute drive-time from the center point of East Lampeter Township (here from the intersection of Mount Sidney Road and Old Philadelphia Pike)
- **Lancaster County:** as defined by Census county boundaries
- **Five-County Region:** Representing the five Pennsylvania counties surrounding Lancaster County, including York, Dauphin, Lebanon, Berks, and Chester counties.



Demographic Trends Analysis

Key Findings: Demographic Trends Analysis

Stronger growth in non-family households

According to 2020 American Community Survey estimates, a quarter of households in the township are non-family householders living alone. While Esri expects that the township will continue to experience positive but relatively flat overall household growth through 2028 (growing by 0.7 percent per year), non-family household growth is expected to be slightly stronger than family household growth over the next five years.

High share of household expenditures dedicated to housing costs

The share of total household expenditures dedicated to housing costs (including rent or mortgage payments, property taxes, and utilities) in East Lampeter (42 percent) is relatively high compared to that in the county (39 percent), indicating that housing costs in the township are taking up a larger portion of a household's income - indicating a less affordable housing market.

County homeless population increasing in recent years

According to HUD's Point-in-Time (PIT) data for Lancaster County, while the total homeless population in the county (526 persons in 2023) is 11 percent less than it was in 16 years ago (589 persons in 2007), it has been increasing in recent years. For example, the county's homeless population in 2023 represents a 64 percent increase since 2017 (321 persons), with contributing factors including the end of COVID-era eviction prevention programs like ERAP (Emergency Rental Assistance Program), a lack of affordable and subsidized housing, and the county's exceptionally low rental vacancy rate.

Methodology: Demographic Trends Analysis

Population and households are two key drivers of housing markets. Understanding how households are growing or changing can help better anticipate potential changes in near-term housing demand. Accordingly, using a combination of published government data (U.S. Census, American Community Survey) and proprietary analysis software (ESRI Community Analyst), 4ward Planning collected socio-economic trend data (e.g., population, households, household income and distribution, homeownership rates by household type) for East Lampeter Township, the primary market area representing a 20-Minute drive time from the center point of East Lampeter Township, as well as Lancaster County and the five-county region, for comparative purposes. Using data provided by the American Community Survey and HUD's Point-in-Time (PIT) data.

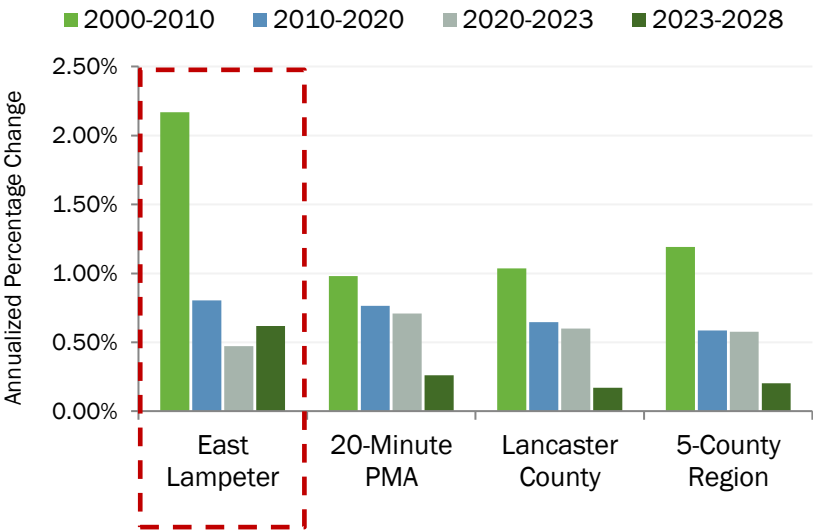
Demographic data is provided by ESRI and displayed for 2010, 2023 (estimated), and 2028 (projected). It should be noted that Esri's near-term population, household, and housing unit projections for the Township, which are based on 2020 U.S. Census population counts and typically reflect what is in the development pipeline, appear to be lower than what is expected given 4ward Planning's review of the development pipeline (1,530 units).

4ward Planning also examined cost-burdened households (based on HUD standards), poverty rates, elderly and disabled populations, and homelessness.

Near-Term Population Change

East Lampeter is expected to continue experiencing positive, albeit relatively flat population growth through 2028 (changing by 0.6 percent per year), with total township population projected to increase by approximately 540 residents over the next five years. Total PMA population is expected to increase by approximately 3,580 residents (0.3 percent per year) over the same period. However, township projections provided by Esri do not fully capture the approximately 1,530 units in the development pipeline, meaning the projection is likely very low.

Annualized Percentage Change, Total Population



Population by Geography

	2000	2010	2020	2023	2028	Net Change (2023-2028)
East Lampeter	13,522	16,454	17,776	17,464	18,003	539
20-Minute PMA	229,624	252,152	271,426	275,384	278,962	3,578
Lancaster County	470,658	519,445	552,984	559,987	564,772	4,785
5-County Region	1,561,015	1,746,968	1,849,358	1,877,933	1,897,074	19,141

Source: US Census Bureau; Esri; 4ward Planning Inc., 2023

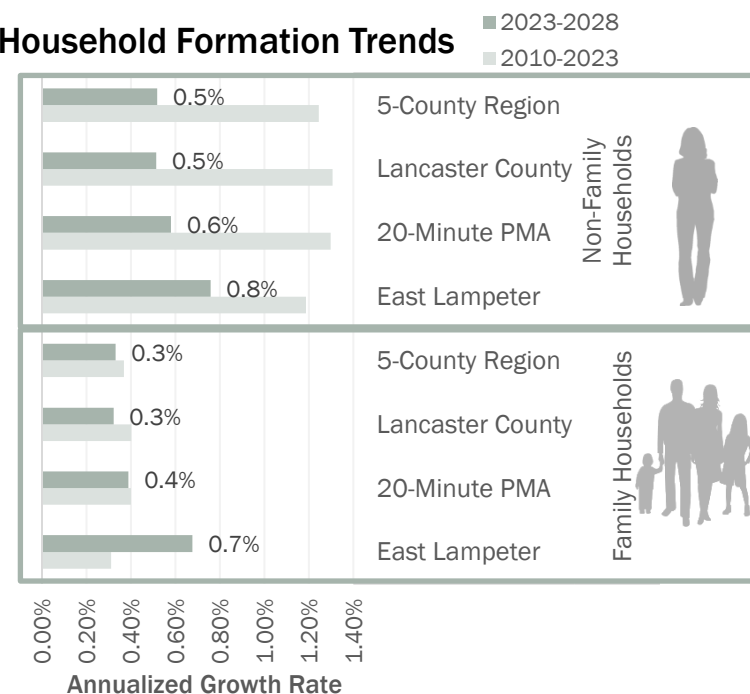
Household Formation

Near-term household formation drives demand for housing. As illustrated in the table below, from 2023 to 2028, the township is projected to continue experiencing positive, but relatively flat, household growth (growing by 0.7 percent per year or by approximately 240 households – it should be noted that the actual figure is likely to be higher, based on proposed residential development projects at the time of this analysis). As illustrated in the chart to the right, Esri expects the increase of non-family household formation (top right) in all geographies to be slightly stronger than the rates of family household growth (bottom right). The PMA is expected to increase by approximately 2,380 households over the next five years.

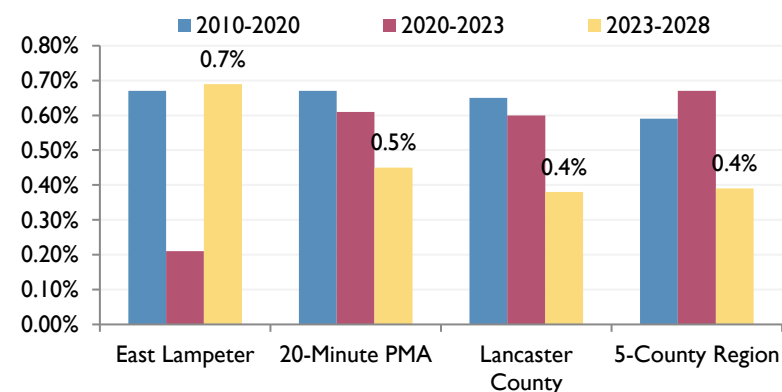
Households by Geography

	2000	2010	2020	2023	2028	Net Change (2023-2028)
East Lampeter	5,328	6,413	6,857	6,904	7,147	243
20-Minute PMA	86,794	95,853	102,444	104,505	106,889	2,384
Lancaster County	172,560	193,602	206,467	210,539	214,581	4,042
5-County Region	596,915	668,321	708,726	724,201	738,462	14,261

Household Formation Trends



Annualized Household Change

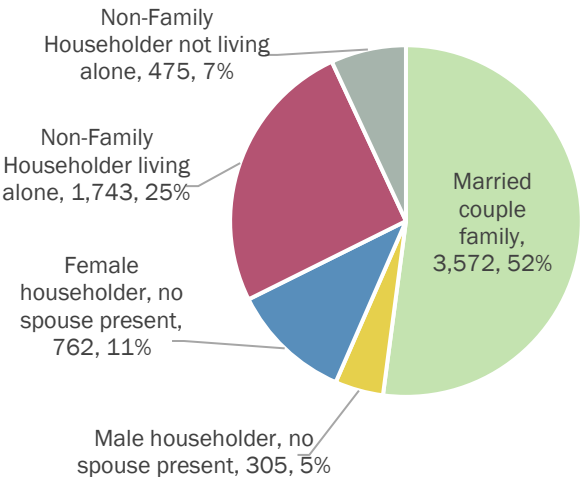


Source: US Census Bureau; Esri; 4ward Planning Inc., 2023

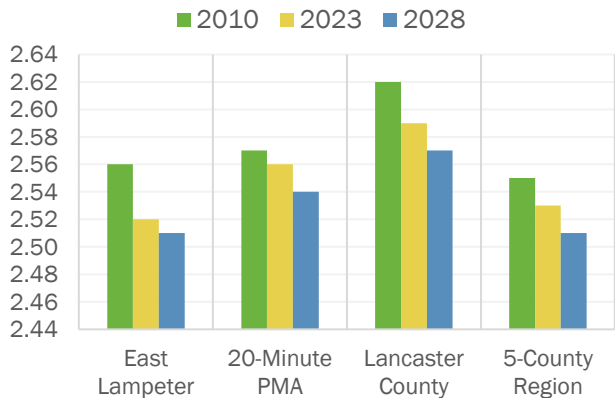
Household Size & Composition

According to Esri, likely due to stronger growth among non-family households, the average household size in all geographies is expected to continue decreasing in the near term. According to 2020 American Community Survey estimates, approximately half of households in East Lampeter are married-couple family households (52 percent), and a quarter (25 percent) are non-family householders living alone. Single-parent households with children under age 18 represent 15 percent of households in the township, which are largely composed of female-headed households. As illustrated below, the share of households by type in the township are relatively comparable to those in the county and region.

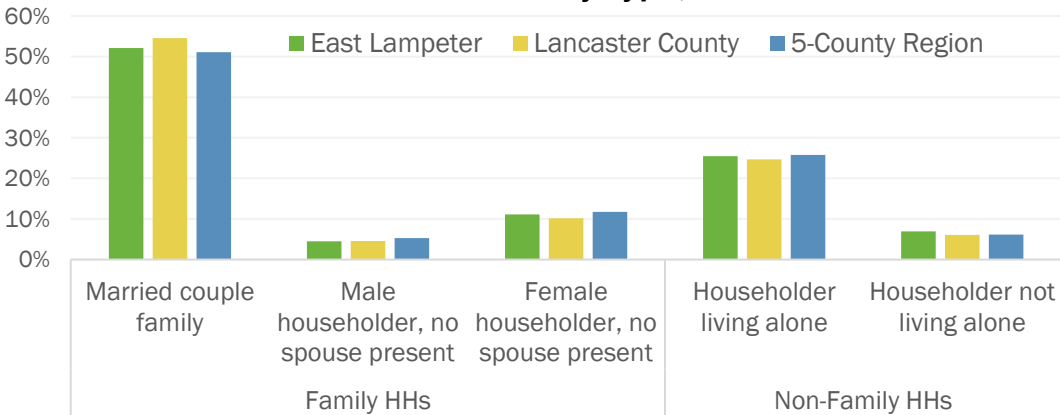
East Lampeter Households, 2020



Average Household Size



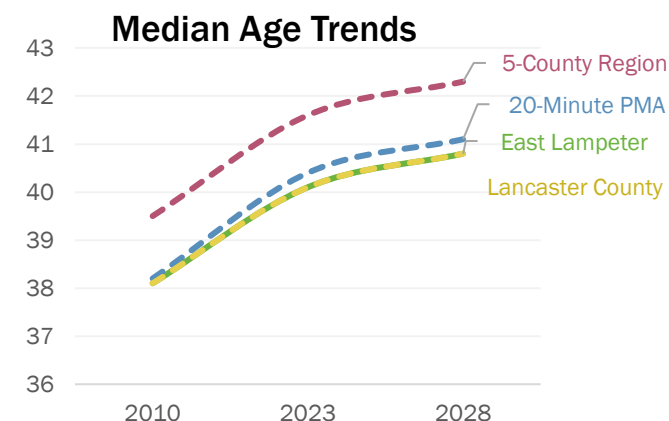
Household Share by Type, 2020



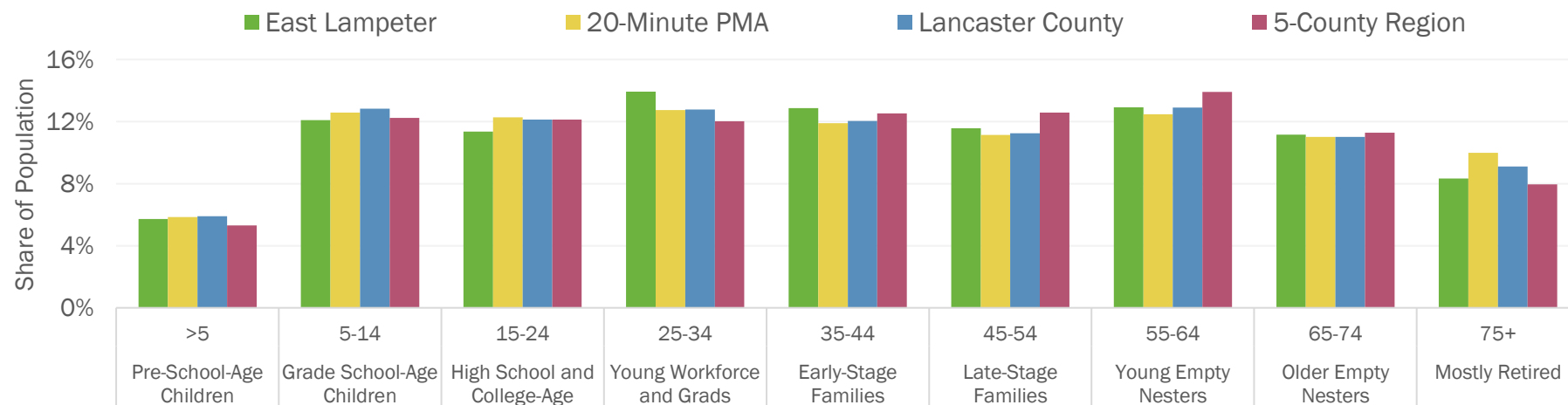
Source: Esri, ACS 5-Year Estimates Subject Tables, P16

Age Distribution

As illustrated in the chart to the right, the median age in East Lampeter (40 years) is similar to that in the PMA and county (40 years) and slightly younger than that in the region (42 years). In general, the township has higher shares of people between 25 and 54 years old and lower shares of mostly retired persons over 75 years. The Township's relatively large workforce cohort is favorable for existing or new businesses seeking to hire entry-level workers. These younger persons will also seek housing suitable to their needs (e.g., studios, one- and two-bedroom units) and goods and services affordable to their incomes.



Age Distribution, 2023

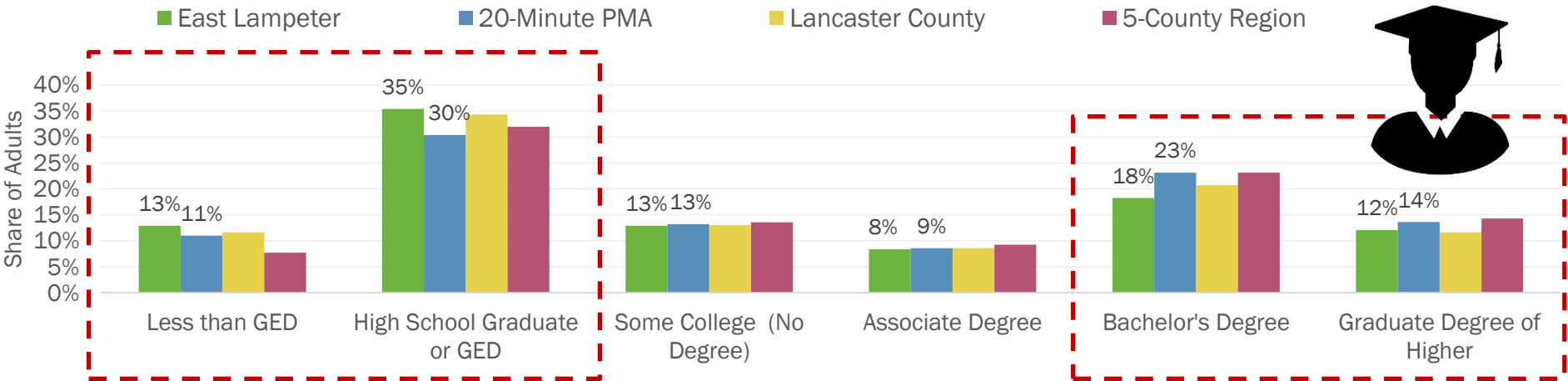


Source: Esri; 4ward Planning Inc., 2023.

Educational Attainment

Educational attainment can be a critical driver of long-term income, job, and population growth for a given area. As illustrated in the chart below, the level of educational attainment in East Lampeter is slightly lower than that in the PMA. For example, the share of adult township residents ages 25 and older holding a bachelor’s degree or higher level of education in the township is lower than that in the PMA (30 vs. 37 percent, respectively), while the share of residents in the township holding a high school degree or lower level of education is higher than that in the PMA (48 vs. 41 percent, respectively). The lower educational attainment level exhibited within the township suggests living-wage employment opportunities for many township residents will come from industries such as manufacturing and construction – those needing skilled tradespeople. Consequently, the township should vigorously support training programs and the promotion of occupations within these industries to local youth.

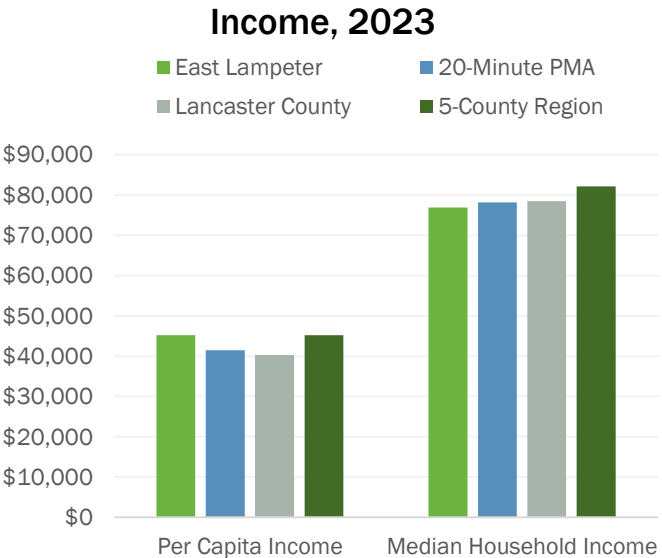
Educational Attainment by Geography, 2023



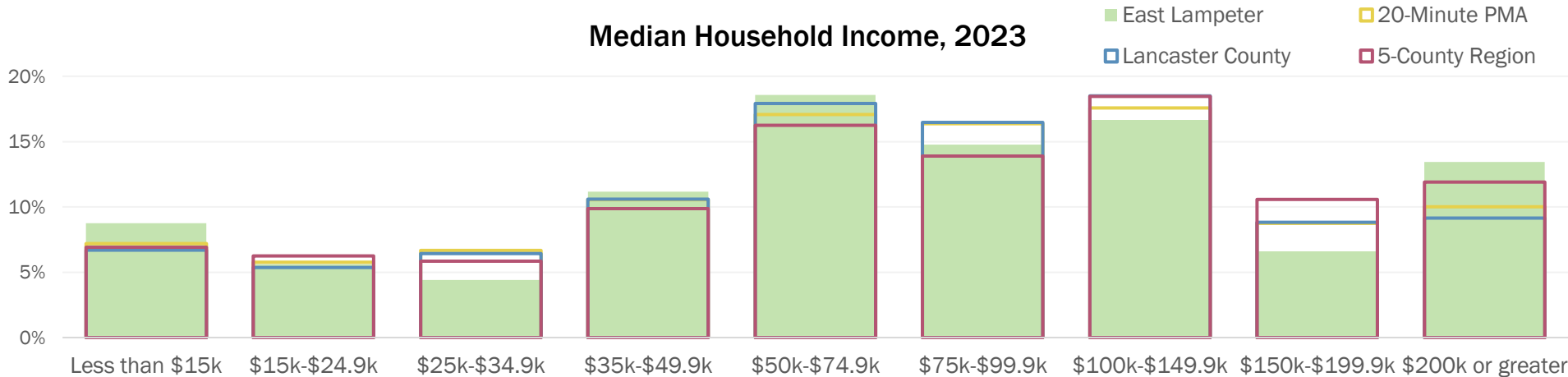
Source: Esri; 4ward Planning Inc., 2023

Median Household Income

Educational attainment is typically strongly and positively correlated with earnings, with households and persons with higher levels of educational attainment associated with higher incomes. East Lampeter’s relatively lower levels of educational attainment correspond with a median household income that is slightly lower than that of the PMA. As shown in the chart to the right, in 2023, the township has a median household income of approximately \$76,880, compared to \$78,130 in the PMA. As illustrated below, the largest share of township households have household incomes between \$50,000 and \$74,999 (19 percent).



Median Household Income, 2023

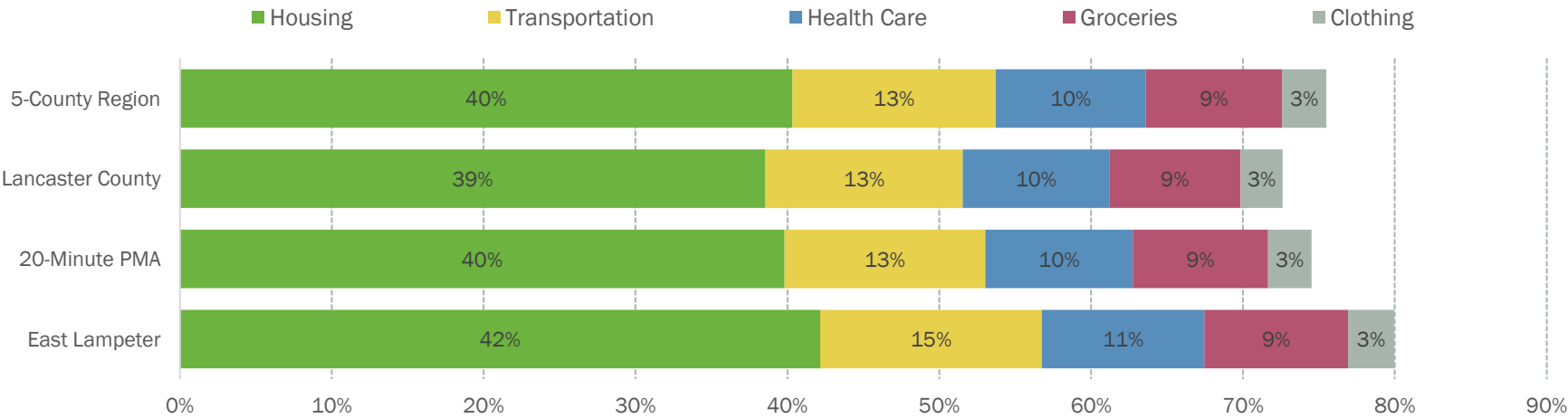


Source: US Census Bureau; Esri; 4ward Planning Inc., 2023

Household Expenditures

The share of average household expenditures on basic needs can provide valuable insight into the affordability of a place or region. Furthermore, the share dedicated to housing costs, including rent or mortgage payments, property taxes, and utilities, can offer a clear picture of housing affordability. Households in East Lampeter dedicate a higher share of household expenditures on housing (42 percent) compared to the other geographies (as low as 39 percent in the county), suggesting that housing costs are taking up a larger portion of household income - potentially indicating a less affordable housing market.

Share of Household Expenditures on Basic Needs by Geography, 2023



Source: Esri; 4ward Planning Inc., 2023

Affordable Income and Housing Costs: Lancaster County

The Department of Housing and Urban Development (HUD) sets income limits that determine eligibility for housing assistance based on area median income (AMI) and family size. Generally, Section 8 limits are based on 50 percent of area median income, while Community Development Block Grant (CDBG) program limits are tied to 80 percent of area median income. Based on HOME income limits for the 2023 fiscal year, in Lancaster County, a one-person household with an income of \$53,500 would qualify as a low-income household (80 percent of AMI), and a one-person household with an income of \$80,200 would qualify as a moderate-income household (120 percent of AMI). Assuming a household can afford 30 percent of its monthly income on housing, an affordable rent or mortgage payment would be \$1,340 per month for a one-person low-income household and \$2,010 per month for a one-person moderate-income household. According to the Lancaster County Housing and Redevelopment Authority, there are 50 to 60 units occupied by Section 8 certificate holders in the township.

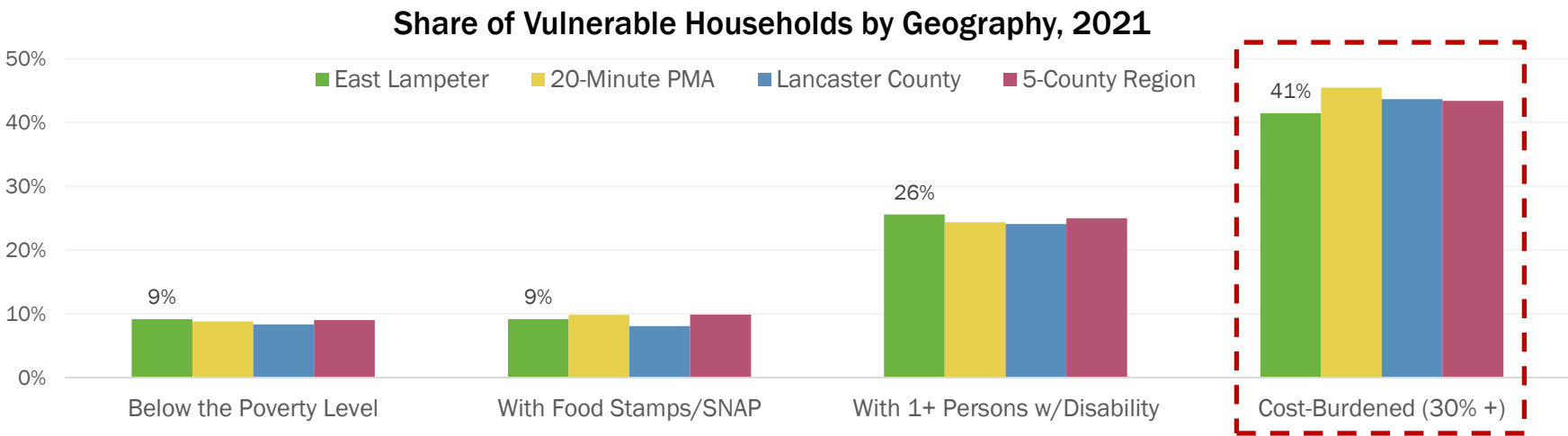
Affordable Income Limits & Monthly Housing Costs: Lancaster County, 2023

	Family Size			
	1	2	3	4
HUD Income Limits by Persons in Family				
Extremely-Low (30%)	\$20,100	\$22,950	\$25,800	\$28,650
Very-Low (50%)	\$33,450	\$38,200	\$43,000	\$47,750
Low (80%)	\$53,500	\$61,150	\$68,800	\$76,400
Moderate (120%)	\$80,200	\$91,700	\$103,150	\$114,600
Affordable Monthly Rent/Mortgage Payment (30% of Monthly Income)				
Extremely-Low (30%)	\$500	\$570	\$650	\$720
Very-Low (50%)	\$840	\$960	\$1,080	\$1,190
Low (80%)	\$1,340	\$1,530	\$1,720	\$1,910
Moderate (120%)	\$2,010	\$2,290	\$2,580	\$2,870

Source: HUD, FY 2023 HOME Income Limits effective date is June 15, 2023, Lancaster, PA MSA

Vulnerable Households

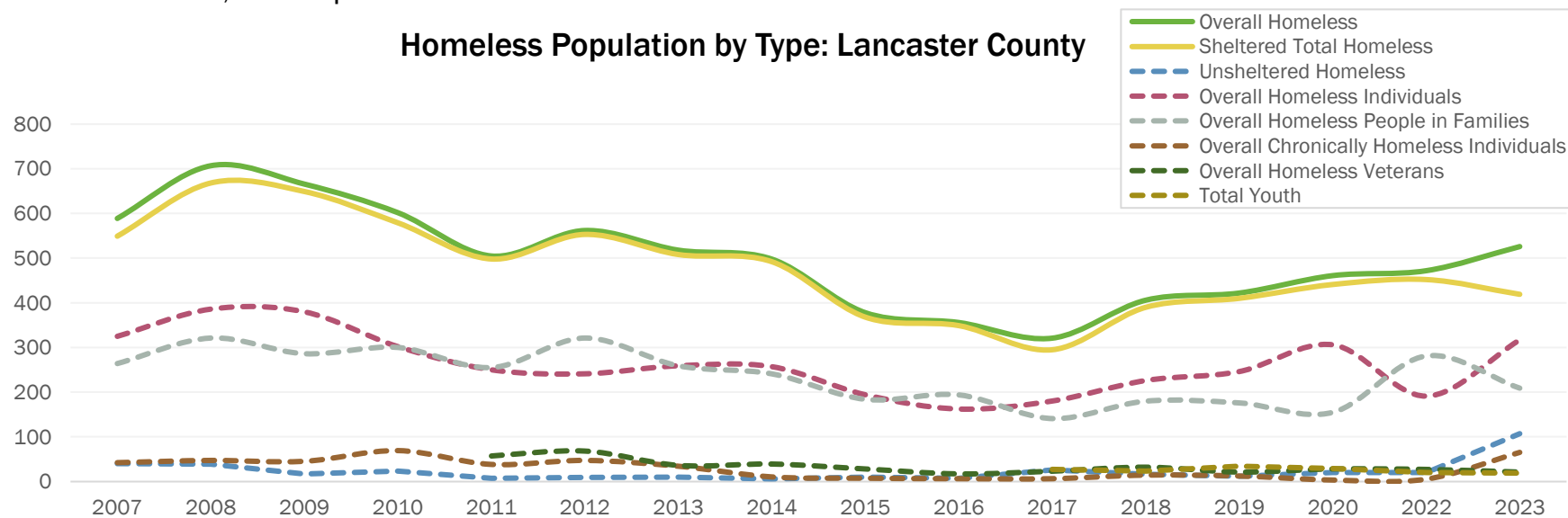
According to 2021 American Community Survey data provided by Esri, nine percent of East Lampeter households are below the poverty level, nine percent receive nutrition assistance via food stamps/SNAP (Supplemental Nutrition Assistance Program), and 26 percent live with one or more persons with a disability. According to the U.S. Department of Housing and Urban Development (HUD), households that spend more than 30 percent of their incomes on housing are considered “cost-burdened” and may have difficulty affording necessities such as food, clothing, transportation, and medical care. According to 2021 estimates provided by the U.S. Census Bureau, approximately 41 percent of all renter households in the township pay more than 30 percent of their monthly household incomes on rent. The development of affordable rental housing options in the township could appeal to these cost-burdened households.



Source: American Community Survey; Esri, 2023

Homeless Population by Type: Lancaster County

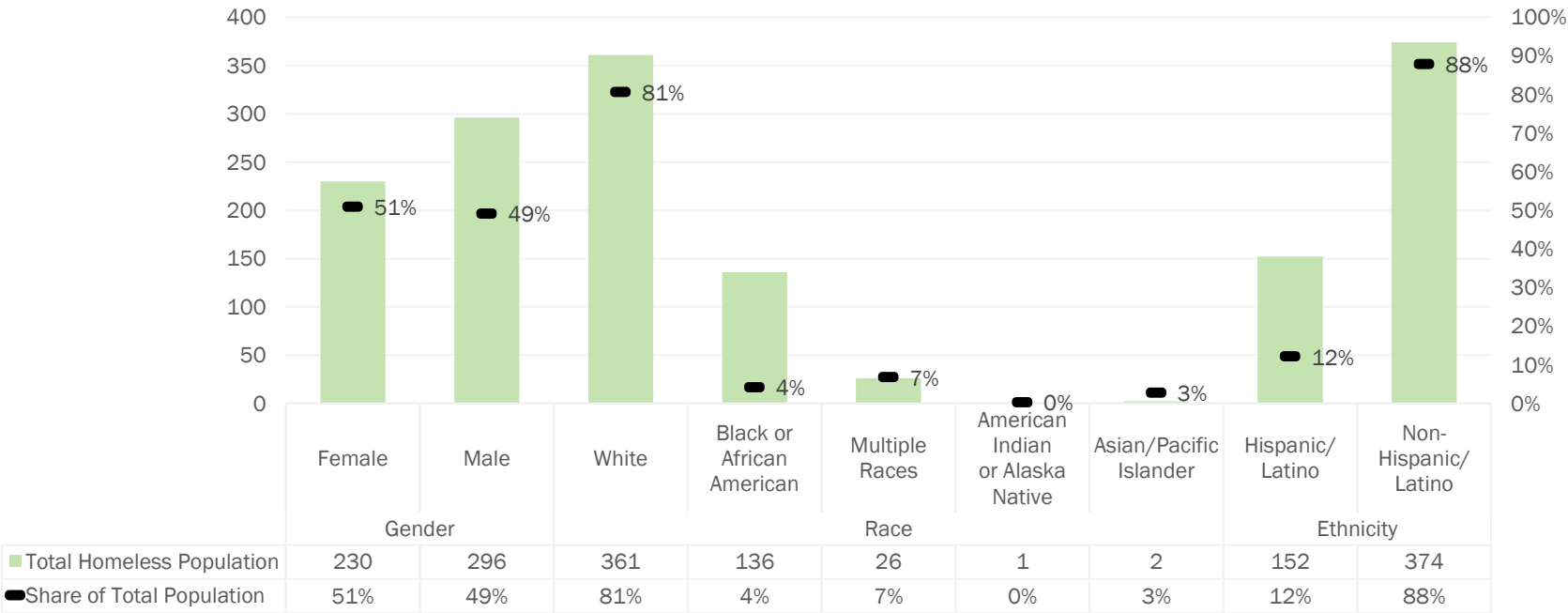
The US Department of Housing and Urban Development (HUD)'s Point-in-Time (PIT) data is a count of sheltered and unsheltered people experiencing homelessness on a single night in January. According to PIT data provided for Lancaster County, while the total homeless population in the county (526 persons in 2023) is 11 percent less than it was in 16 years ago (589 persons in 2007), it has increased over the past six years, with contributing factors including the end of COVID-era eviction prevention programs like ERAP (Emergency Rental Assistance Program), a lack of affordable and subsidized housing, and the county's exceptionally low rental vacancy rate. The number of people counted on each year's PIT has increased every year since 2017, with 2023 representing a 64 percent increase since 2017 (321 persons), mirroring national trends in homelessness. It is notable that the 2023 PIT count included the greatest number of people experiencing unsheltered homelessness on record - 107 individuals, a 435 percent increase over 2022.



Source: U.S. Department of Housing and Urban Development 2023 Annual Homeless Assessment Report to Congress (AHAR); 2023 U.S. Census Bureau Population Estimates.
 Note: The Covid-19 pandemic interrupted data collection in 2021, so data for that year is unavailable. Veteran data is unavailable before 2011. Youth data is unavailable before 2017.

Homeless Population by Demographics: Lancaster County

In 2023, White persons represent 81 percent of Lancaster County’s population, as well as the largest number of homeless persons by race (361 persons) in the county. However, comparison of U.S. Census data to 2023 PIT data appears to show an overrepresentation of people who identify as Black or African American (136 homeless persons) and those who identify as Hispanic or Latino (152 homeless persons) experiencing homelessness in Lancaster County. Males are also slightly overrepresented in the 2023 PIT data (296 homeless women).



Source: U.S. Department of Housing and Urban Development. Point-in-Time (PIT) count; Esri, 2023

Labor Trends Analysis

Key Findings: Labor Trends Analysis

Shifting economy due to manufacturing sector declines

The manufacturing sector is the top sector by employment share in the township (representing nearly 20 percent of all primary jobs). Although this sector experienced employment gains in the township from 2010 to 2011, it lost 465 jobs overall from 2002 to 2020 (while the county lost 14,950 manufacturing jobs, over the same period). As this sector traditionally offered mid-wage job opportunities, often without requiring advanced college degrees, job losses in this sector can result in reduced incomes and job opportunities for workers.

Demand for mid-end affordable and rental housing options

According to industry projections provided by the Pennsylvania Department of Labor and Industry for Lancaster County, the health care and social assistance and accommodation and food services sectors (the two top sectors by job growth) are expected to add 555 and 440 new jobs, respectively, each year through 2030. While projected job growth in the health care and social assistance sector will likely spur demand for mid-end residential properties in the county, project job growth in the accommodation and food services sector will likely lead to increased demand for affordable and rental housing options.

13,840 workers commuted into the township

In 2020, 13,840 workers commuted into the township for work. With just six percent of township workers also living in the township, and 1,860 workers traveling more than 25 miles to work, there is likely pent-up housing demand, as some workers may trade a long commute if quality housing were available in the township.

Methodology: Labor Trends Analysis

As labor and housing markets are inextricably linked, 4ward Planning conducted a thorough examination of labor and industry trends within Lancaster County and, for comparison purposes, the five Pennsylvania counties surrounding Lancaster County (York, Dauphin, Lebanon, Berks, and Chester). Specifically, we identified the top six industries, by employment, within the county and region, and identified where employment centers exist within the county (e.g., concentrations of employment which will typically indicate where housing demand exists). This analysis enables us to determine employment growth and how it might influence housing demand in the township. Based on data provided by the Census Bureau's *OnTheMap* tool, 4ward Planning identified employment center locations and worker travel patterns within East Lampeter Township. Further analysis of commuting patterns and travel time to work was evaluated using Esri and the American Community Survey, offering a better understanding of current pent-up housing demand from commuting workers and the need for workforce (affordable) housing.

Industries by Employment Share

This table compares primary job employment share by industry in 2020 (the latest year provided at the township level) for East Lampeter Township, Lancaster County, and the five-county region, with the top six sectors for each geography highlighted in bold. While the manufacturing sector is the top sector by employment share in the township (representing nearly 20 percent of all primary jobs), the health care and social assistance sector is the top sector by employment share within the county and region.

Top Six Industries by Primary Job Share, 2020

	East Lampeter Township	Lancaster County	5-County Region
Manufacturing	19.8%	16.5%	13.2%
Retail Trade	18.1%	11.5%	9.9%
Accommodation and Food Services	10.8%	5.8%	5.1%
Health Care and Social Assistance	8.3%	17.3%	16.3%
Construction	7.7%	7.9%	4.9%
Wholesale Trade	7.5%	5.9%	4.3%
Educational Services	4.7%	7.1%	7.4%
Other Services (excluding Public Administration)	4.0%	2.7%	2.9%
Management of Companies and Enterprises	3.6%	1.9%	3.3%
Administration & Support, Waste Management and Remediation	3.4%	3.7%	5.2%
Professional, Scientific, and Technical Services	2.7%	5.0%	6.5%
Finance and Insurance	2.3%	3.1%	5.6%
Transportation and Warehousing	2.2%	5.2%	4.7%
Real Estate and Rental and Leasing	1.5%	0.9%	1.0%
Arts, Entertainment, and Recreation	1.4%	0.9%	1.2%
Agriculture, Forestry, Fishing and Hunting	1.0%	1.2%	1.1%
Public Administration	0.7%	1.7%	5.3%
Information	0.0%	1.1%	1.5%
Utilities	0.0%	0.3%	0.5%
Mining, Quarrying, and Oil and Gas Extraction	0.0%	0.2%	0.1%

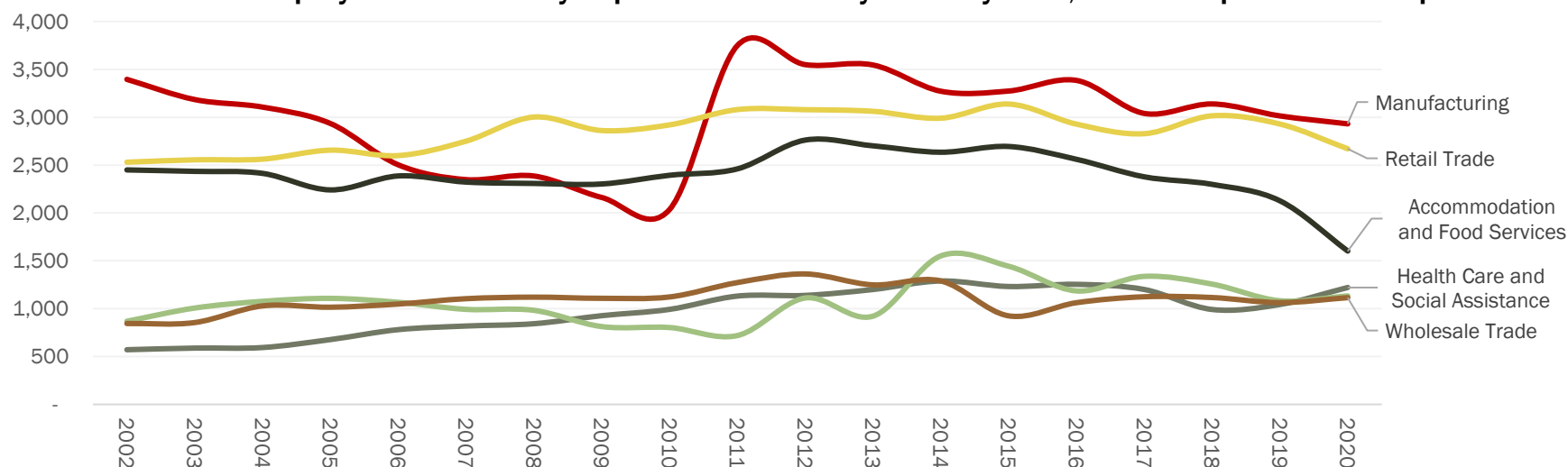
Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Employment Trends for Top Six Industries: East Lampeter Township

Although the township's manufacturing sector experienced employment gains from 2010 to 2011, it lost 465 jobs overall from 2002 to 2020 (the county lost 14,950 manufacturing jobs, during the same period). The accommodation and food services sector lost nearly 850 jobs from 2002 to 2020, although some of this loss can likely be attributed to the onset of the Covid-19 pandemic and has presumably rebounded in recent years.

	2002	2020	Change
Manufacturing	3,397	2,932	(465)
Retail Trade	2,531	2,671	140
Accommodation and Food Services	2,449	1,601	(848)
Health Care and Social Assistance	569	1,220	651
Construction	869	1,134	265
Wholesale Trade	845	1,115	270

Employment Trends by Top Six Industries by Primary Jobs, East Lampeter Township

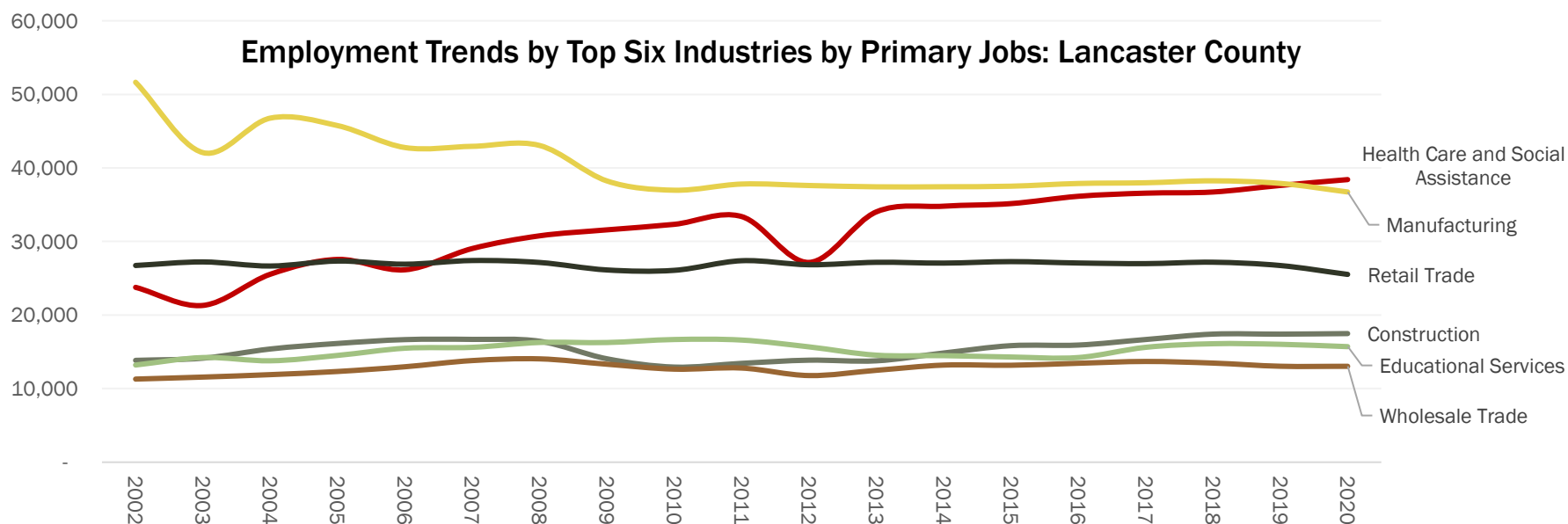


Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Employment Trends for Top Six Industries: Lancaster County

In 2020, the health care and social assistance sector replaced manufacturing as the top sector by employment in the county. Overall, from 2002 to 2020, the county gained approximately 14,660 health care and social assistance sector jobs while it lost approximately 14,950 manufacturing jobs.

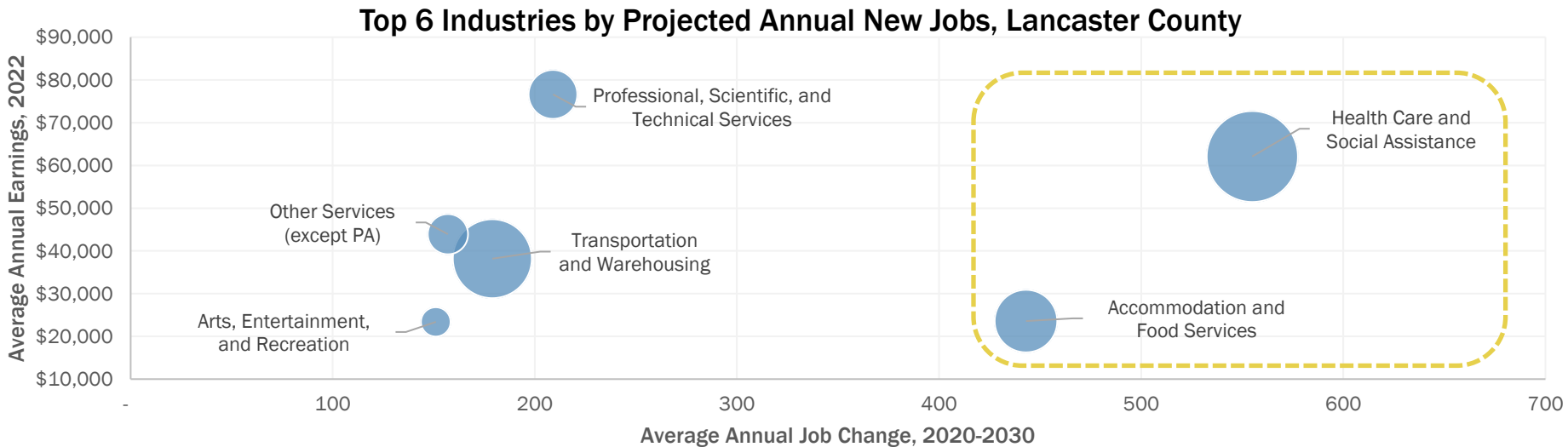
	2002	2020	Change
Health Care and Social Assistance	23,773	38,431	14,658
Manufacturing	51,665	36,713	(14,952)
Retail Trade	26,749	25,529	(1,220)
Construction	13,829	17,464	3,635
Educational Services	13,187	15,707	2,520
Wholesale Trade	11,285	13,025	1,740



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Top Six Industries: Lancaster County

According to industry projections provided by the Pennsylvania Department of Labor and Industry for Lancaster County, the health care and social assistance sector is expected to add 555 new jobs each year through 2030. According to estimates provided by the U.S. Census Bureau, with an average annual earnings of \$62,080 in 2022, the health care and social assistance sector provides relatively mid-wage job opportunities. The accommodation and food services sector is the second top industry by new annual jobs added through 2030 (440 jobs), a sector that provides relatively low-wage job opportunities (with an average annual earnings of \$23,580). While project job growth in the health care and social assistance sector will likely boost demand for mid-end residential properties in the county, project job growth in the accommodation and food services sector will likely lead to increased demand for affordable and rental housing options.

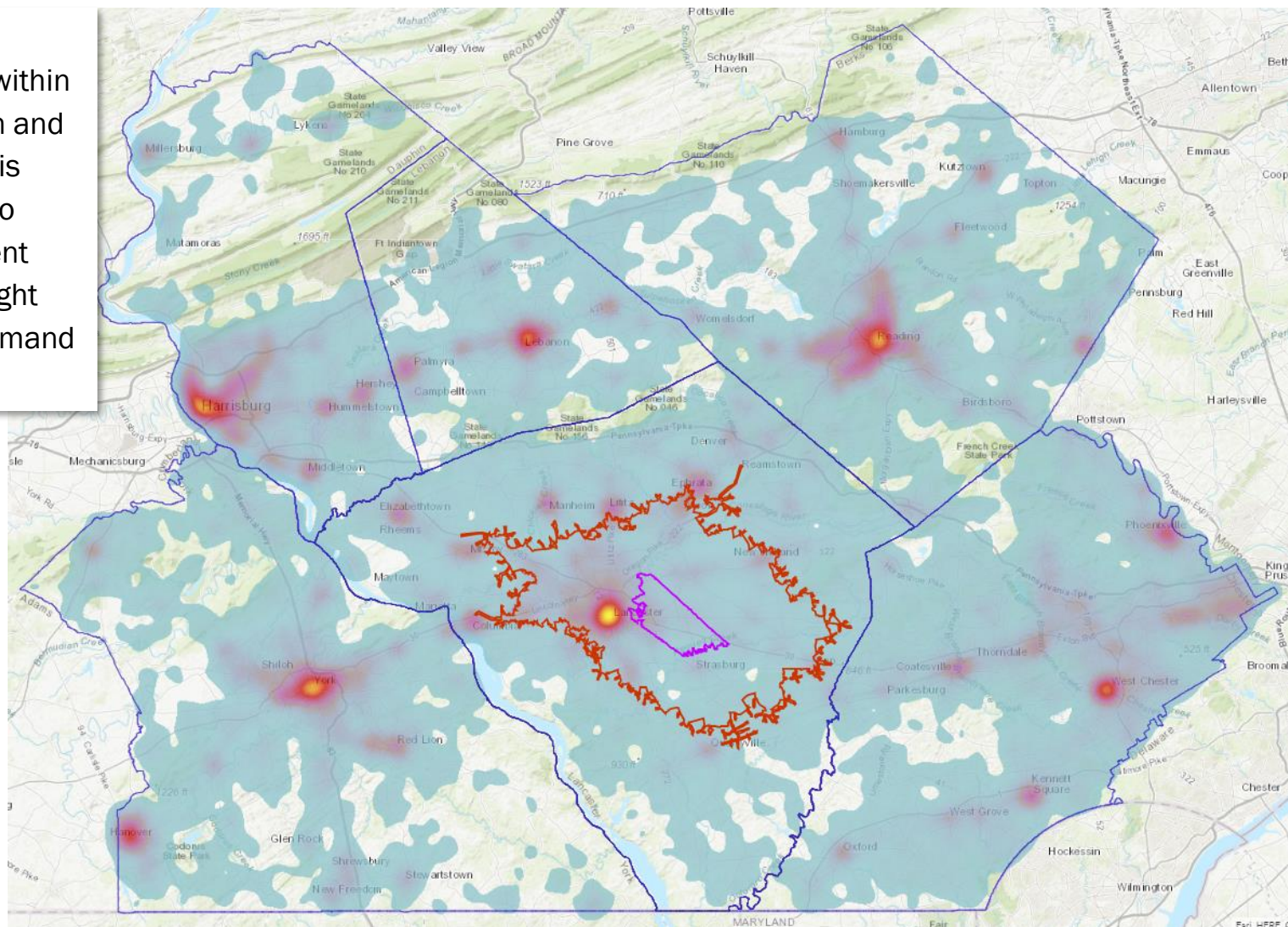


Note: Bubble size represents average 2022 employment by industry in the county.
Source: Pennsylvania Department of Labor and Industry, 2020-2030 Long-Term Projections, Lancaster County WDA; U.S. Census Bureau, Center for Economic Studies, LEHD

Employment Centers: Five-County Region & Lancaster County

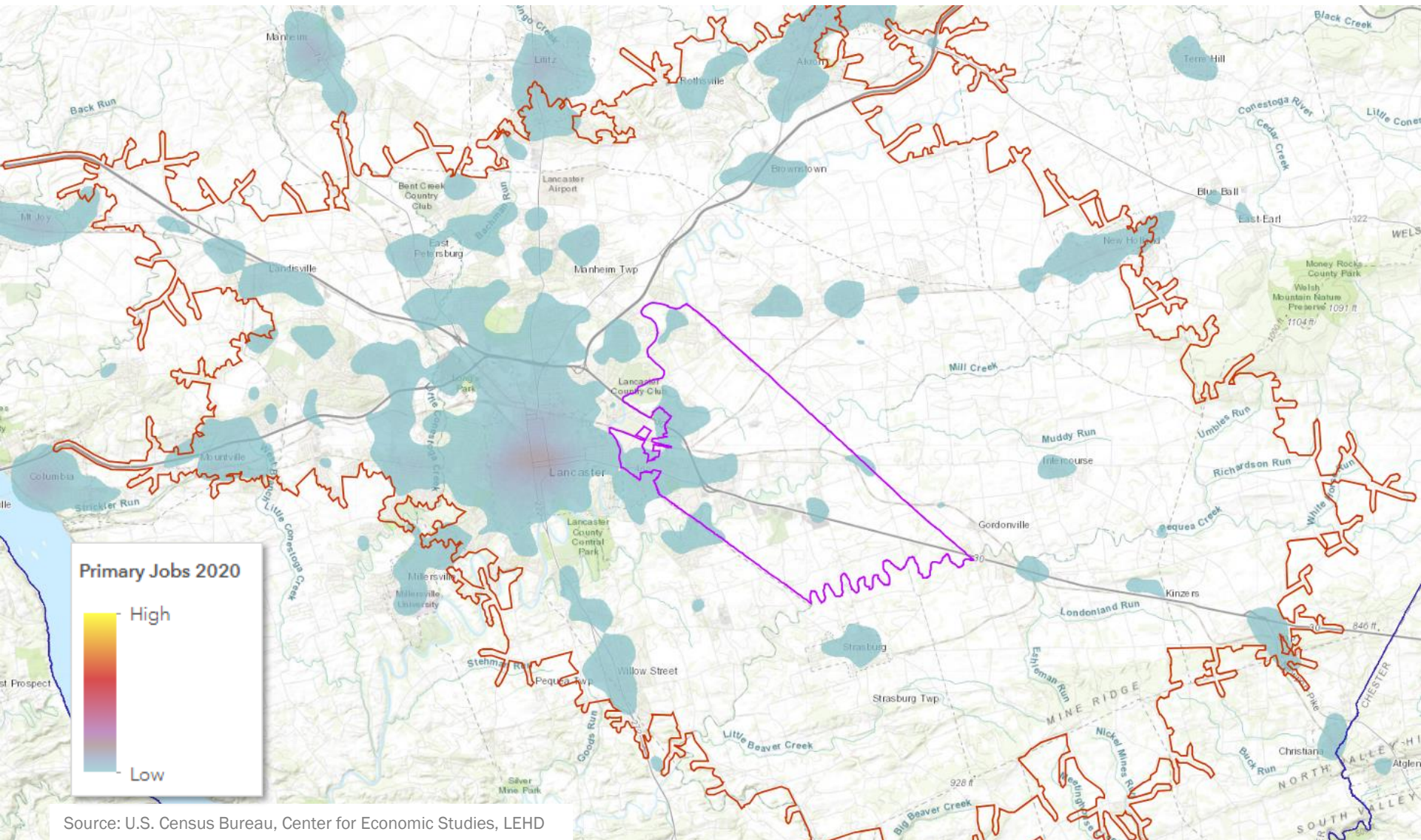
The map illustrates primary job clusters within the five-county region and Lancaster County. This analysis enables us to determine employment growth and how it might influence housing demand in the township.

Primary Jobs 2020



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Employment Centers: 20-Minute PMA



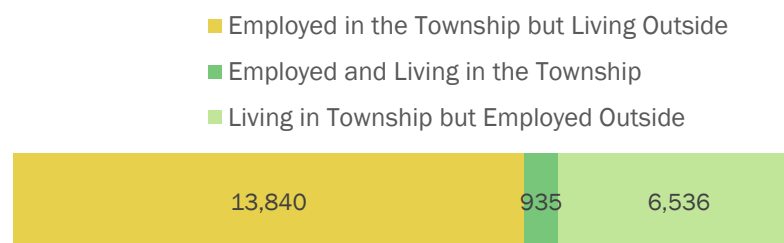
Worker Travel Patterns: East Lampeter Township

In 2020, 13,840 workers commuted into the township for work and 6,536 residents commuted outside the township for work. Fourteen percent of township workers commuted from Lancaster City. With just six percent of township workers also living in the township, and 1,860 workers traveling more than 25 miles to work, there is likely pent-up housing demand, as some workers may trade a long commute if quality housing were available in the township. It should be noted that this data doesn't reflect the recent rise in remote workers accelerated by the Covid-19 pandemic, which impacted workers in industries less reliant on direct, in-person interactions and able to adapt to remote work.

Workers' Places of Residence, 2020

Place	Count	Share
All Places (Cities, CDPs, etc.)	7,471	100.0%
Lancaster city, PA	1,058	14.2%
Leola CDP, PA	348	4.7%
Philadelphia city, PA	140	1.9%
New Holland borough, PA	129	1.7%
Intercourse CDP, PA	104	1.4%
Willow Street CDP, PA	93	1.2%
Smoketown CDP, PA	81	1.1%
Witmer CDP, PA	65	0.9%
Hershey CDP, PA	57	0.8%
Ephrata borough, PA	51	0.7%
All Other Locations	5,345	71.5%

Workers Inflow/Outflow by Primary Jobs, 2020

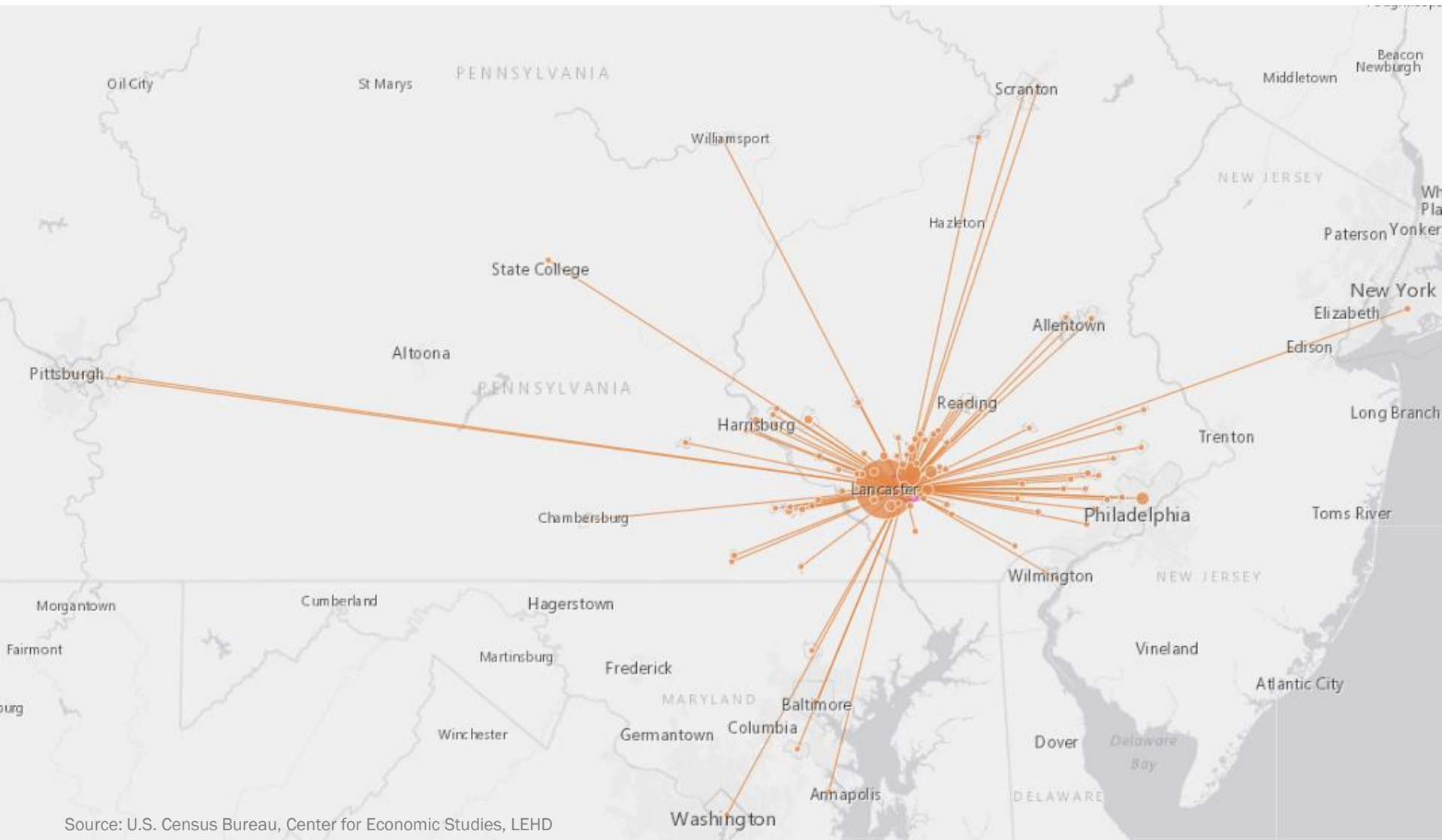


Commuting Distance to Work in Township, 2020



Source: U.S. Census Bureau, Center for Economic Studies, LEHD

Worker Travel Patterns: East Lampeter Township



Top Employers: East Lampeter Township

The table below presents the top 10 employers in East Lampeter Township, according to DataAxle data provided by Esri. Harrisburg Area Community College is the township's largest employer, with approximately 1,000 employees.

Company/Business Name	Description	Employee Estimate
Harrisburg Area Community College (HACC)	Junior-Community College-Tech Institutes	1,000
High Steel Structures LLC	Fabricated Structural Metal (Mfrs)	800
Dutch Wonderland	Amusement & Theme Parks	350
Bosch Security	Security Control Equip & Systems-Whls	300
HACC Lancaster Campus	University-College Dept/Facility/Office	300
Kalas Manufacturing Inc.	Manufacturers-Agents & Representatives	300
National Pretzel Co Inc	Cookies & Crackers-Manufacturers	300
Wyndham Lancaster Resort and Convention Center	Hotels & Motels	300
R Kala's Donnelley	Printers (Mfrs)	250
The High Companies	Fabricated Structural Metal (Mfrs)	210

Note: DataAxle represents the best estimate of business and employment data currently available at the township level.

Source: Esri, DataAxle

Top Employers: Lancaster County

The table below presents the top 50 employers in Lancaster County, according to first quarter 2023 data provided by the PA Center for Workforce Information and Analysis. The Lancaster General Hospital is the county's largest employer.

Rank	Employer	Rank	Employer
1	Lancaster General Hospital	26	Wal-Mart Associates Inc
2	Mutual Assistance Group	27	PA State System of Higher Education
3	Giant Food Stores LLC	28	Pepperidge Farm Inc
4	Eurofins Lancaster Laboratories Inc	29	Manheim Township School District
5	County of Lancaster	30	TH Minit Markets LLC
6	Lancaster School District	31	Franklin and Marshall College
7	Dart Container Corporation	32	Turkey Hill Dairy
8	Nordstrom Inc	33	Penn Manor School District
9	Lancaster General Medical Group	34	S K H Management Co
10	Masonic Villages of the Grand Lodge	35	Penn State Health Lancaster Medical
11	Lancaster Lebanon Intermediate Unit	36	Johnson & Johnson Consumer Inc
12	Fulton Bank NA	37	UGI Utilities Inc
13	Federal Government	38	Clark Associates Inc
14	Weis Markets Inc	39	LSC Communications MCL LLC
15	Willow Valley Retirement Communities	40	Cox Automotive Corporate Services
16	Urban Outfitters Wholesale Inc	41	Four Seasons Produce Inc
17	State Government	42	United Parcel Service Inc
18	CNH Industrial America LLC	43	Elizabethtown College
19	Hempfield School District	44	Warwick School District
20	Ephrata Community Hospital Inc	45	UPMC Pinnacle Lititz
21	Tyson Poultry Inc	46	Tait Towers Manufacturing LLC
22	ACME Markets Inc	47	Ephrata Area School District
23	The Webstaurant Store	48	City of Lancaster
24	Armstrong World Industries Inc	49	Donegal Mutual Insurance Co
25	Arconic US LLC	50	Conestoga Wood Specialties

Source: Quarterly Census of Employment and Wages, PA Center for Workforce Information and Analysis, 1Q 2023.

Residential Real Estate Analysis

Key Findings: Residential Real Estate Analysis

Extremely tight township housing vacancy rate

The township's vacancy rate for ownership and rental units is extremely tight (at 1.0 percent and 2.2 percent, respectively, in 2021). Given the township's large number of vacant units characterized as "other vacant" (46 percent of all vacant units or 146 units), East Lampeter should inventory vacant units, particularly in the northern portion of the township (census tract 42071013203), to determine the share of units needing repair in order to make them marketable for rent or sale. Given the tight inventory of available ownership and rental units in the township, such a strategy could yield a critical number of units at a relatively affordable investment.

Need for smaller housing units to accommodate smaller households

There appears to be a housing mismatch in the township between housing unit bedroom counts and household size among small households. As a result, some individuals living alone in the township who might prefer to live in smaller, more affordable studios or one-bedroom apartments may be forced to pay more for larger units. Like that observed in Lancaster County, overall, the township's housing misalignment is likely due to existing and new housing in the township not keeping up with changing household demand (stronger growth among smaller householders and an insufficient number of new studios and one-bedroom units added).

Methodology: Residential Real Estate Analysis

Based on published government data (U.S. Census, American Community Survey, U.S. Department of Housing and Urban Development (HUD)), private data, and proprietary analysis software (ESRI Community Analyst), 4ward Planning examined current housing metrics and trends across geographies (e.g., dwelling type, owner- and renter-occupancy rates, building age, housing condition, multi-family units, etc.). Based on private real estate data, 4ward Planning studied residential real estate trends for both owner- and renter-occupied housing. Our primary objective here is to gain an understanding of local supply, demand, occupancy, and pricing factors for residential land uses within the county.

Using HUD's aggregated U.S. Postal Service (USPS) administrative data on address vacancies, 4ward Planning examined residential vacancy trends for each of the township's three census tracts. Vacancy trend data (2013-2023) compares the first quarter of each year analyzed.

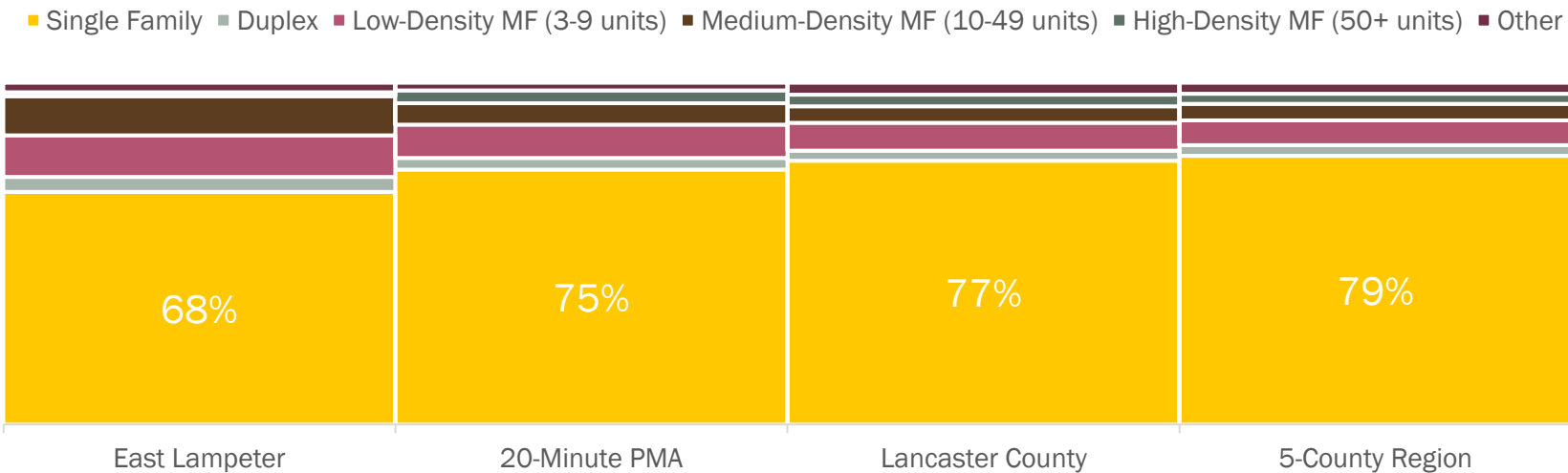
Housing Choice: Unit Type and Bedroom Size

According to Esri, East Lampeter contains 7,210 housing units. According to 2021 American Community Survey (ACS) data provided by Esri, 68 percent of the township’s housing stock is characteristic of traditional single-family structures (detached and attached), a share lower than that in the 20-Minute PMA (75 percent). Conversely, the township has higher shares of multi-unit housing types such as duplexes, triplexes, fourplexes, or other multi-family buildings with more than five units.

Total Housing Units

	2020	2023
East Lampeter	7,158	7,210
20-Minute PMA	107,903	110,133
Lancaster County	216,502	220,901
5-County Region	751,767	768,158

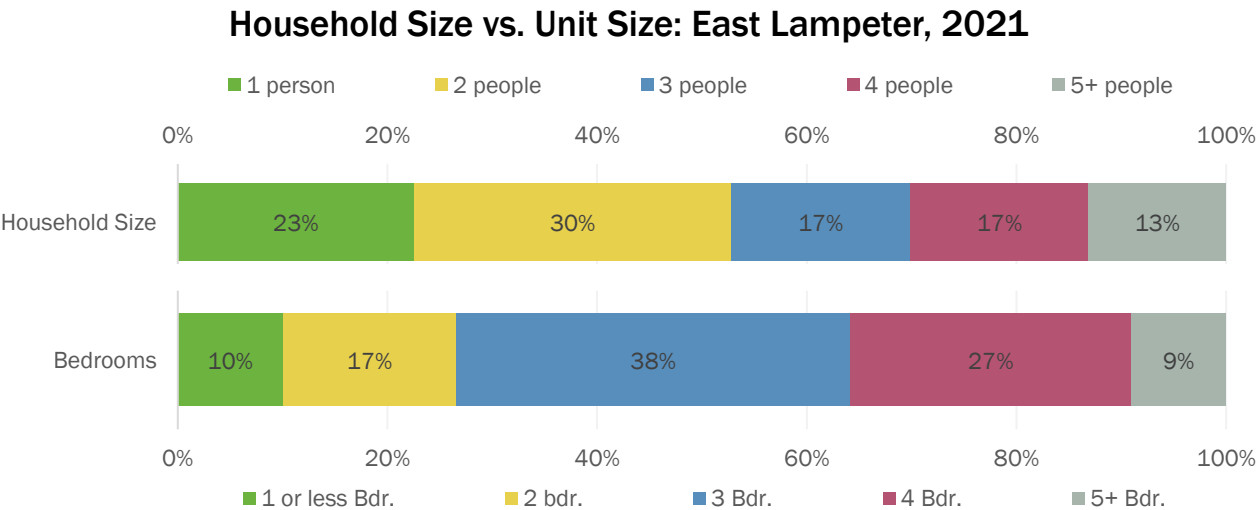
Housing Units Built & Structure by Type, 2021



Source: U.S. Census Bureau, Esri, 4ward Planning Inc., 2023.

Household and Unit Size: East Lampeter Township

One way to measure whether existing housing stock is suited to the local population is to compare household size to the number of bedrooms (unit size) within dwelling units in the local market’s housing inventory. The share of one- and two-person households, combined (53 percent) in East Lampeter is much higher than the share of studios, and one- and two-bedroom units, combined (27 percent). In other words, there is likely a mismatch between housing unit bedroom counts and household size among small households. As a result, some individuals living alone in the township might prefer to reside in smaller, more affordable one-bedroom dwellings if such were available but are paying more for larger units. According to a 2022 report published by the Lancaster County Housing Analysis, the reason for this misalignment is because existing and new housing in the county has not kept up with changing household demand (stronger growth among smaller households but an insufficient number of new studios and one-bedroom units added).

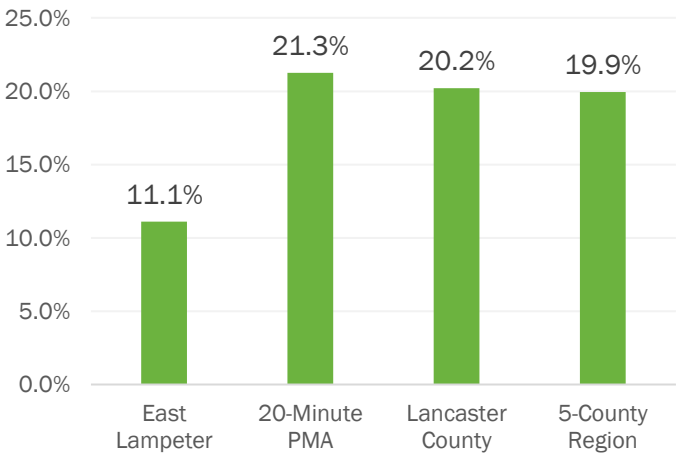


Source: 2021 ACS 5-Year Estimates, B11016; DP04

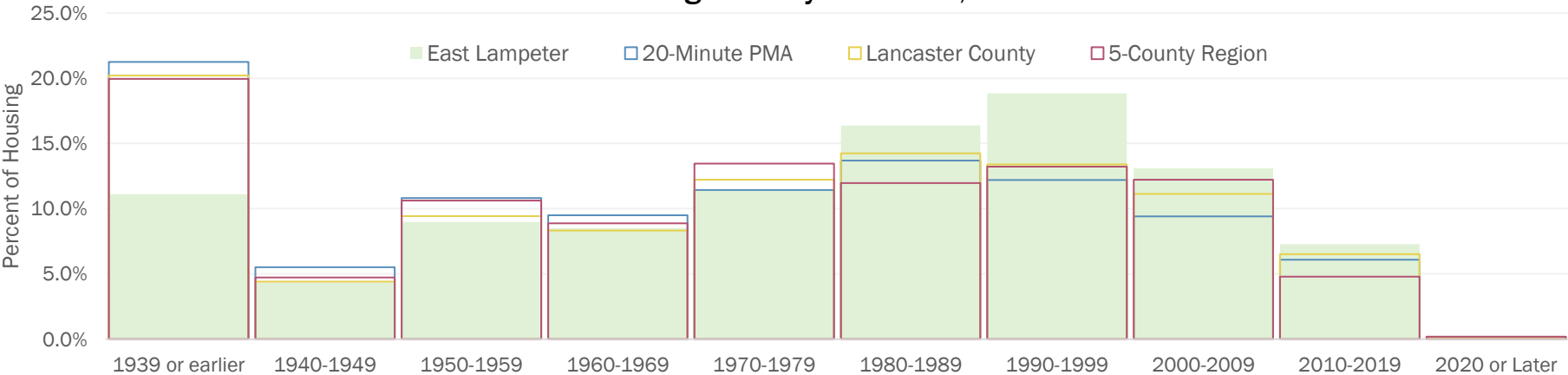
Housing Age

The age of housing units is used to analyze the condition of housing stock in terms of physical needs and historical significance. Compared to that of the other geographies, East Lampeter’s housing stock is relatively new, with 60 percent built between 1970 and 2009. For example, approximately 11 percent of all the township's housing units were built before 1940 - compared to 21 percent within the PMA – suggesting substantial rehabilitation is likely unnecessary for a large share of the township's housing stock.

Share of Housing Built 1939 or Earlier



Housing Units by Year Built, 2023

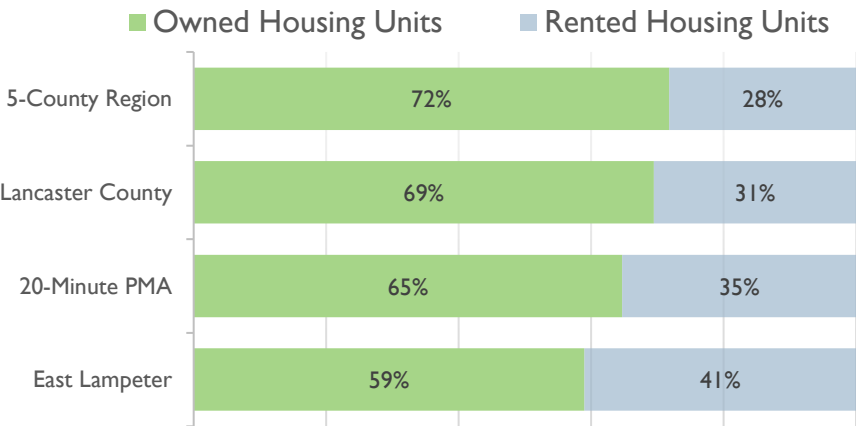


Source: Esri

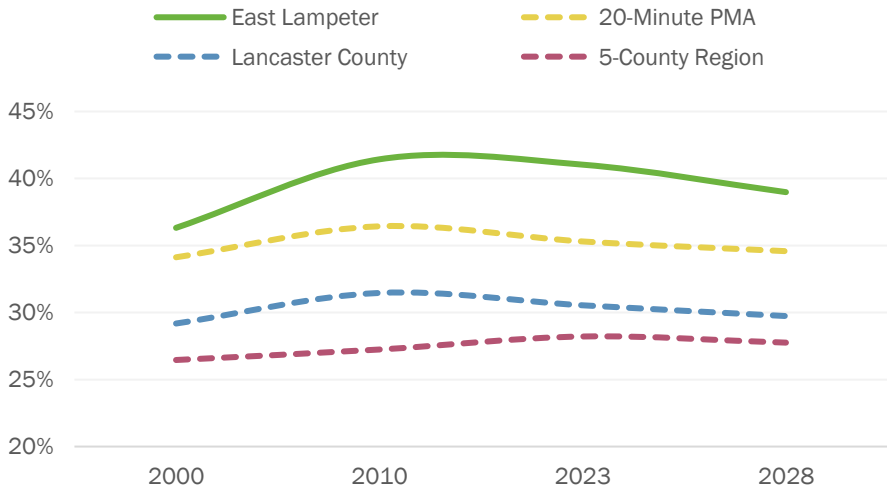
Housing Tenure

Housing tenure refers to whether a housing unit is owner- or renter-occupied. A healthy housing market is one that has a sufficient supply of units to satisfy the needs of households looking to own and rent. As illustrated below, in 2023, 41 percent of all occupied housing units in East Lampeter were renter-occupied, a share much higher than that of the region (28 percent). While the share of renter-occupied housing units in all geographies increased from 2000 to 2010, the share has been decreasing in the township since 2010 and is expected to continue decreasing through 2028. Our interviews with local residential real estate professionals confirm strong demand for both renter- and owner-occupancy units at a variety of price points in the township.

Housing Tenure as Share of Total Occupied Units, 2023



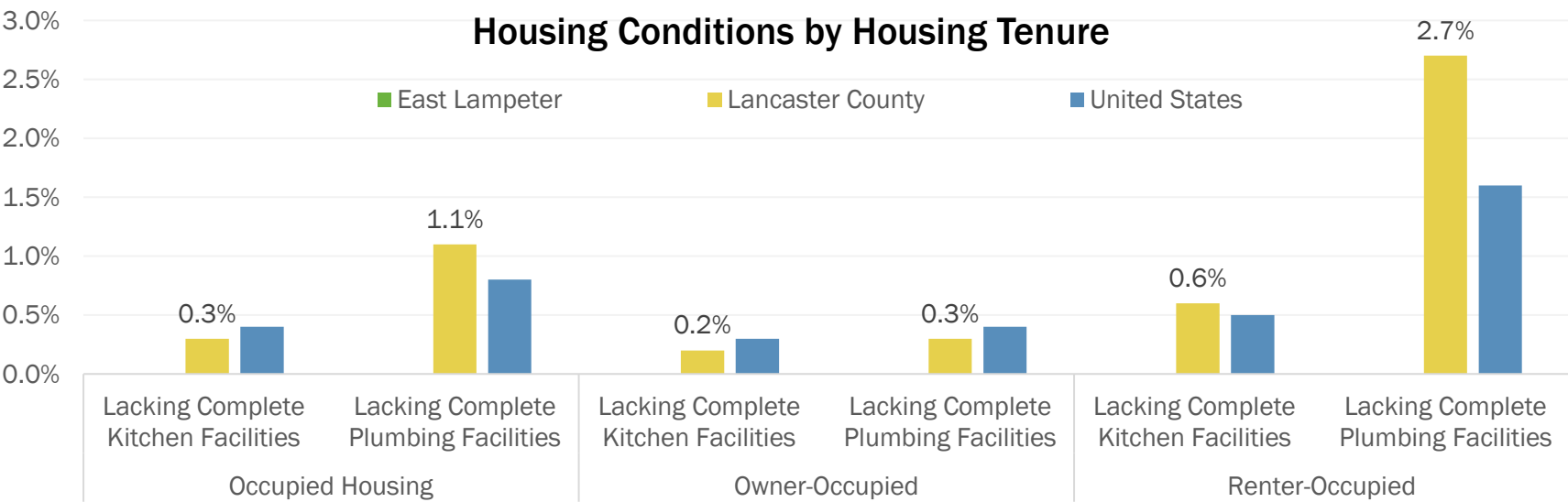
Share Renter-Occupied Housing



Source: Esri; 4ward Planning Inc., 2023.

Housing Condition

In some cases, individuals or families may be forced to live in substandard housing due to financial constraints, particularly in tight markets where people are unable to find suitable housing that meets their basic needs within their budget. Occupied housing units lacking complete plumbing or kitchen facilities can indicate households potentially living in substandard housing, as the lack of complete plumbing and kitchen facilities can lead to sanitation and health issues. According to 2021 estimates provided by the U.S. Census Bureau, while there are occupied housing units lacking either a kitchen or plumbing facilities in Lancaster County (as much as 2.7 percent of renter-occupied households), there are no units lacking either a kitchen or plumbing facilities in East Lampeter Township.

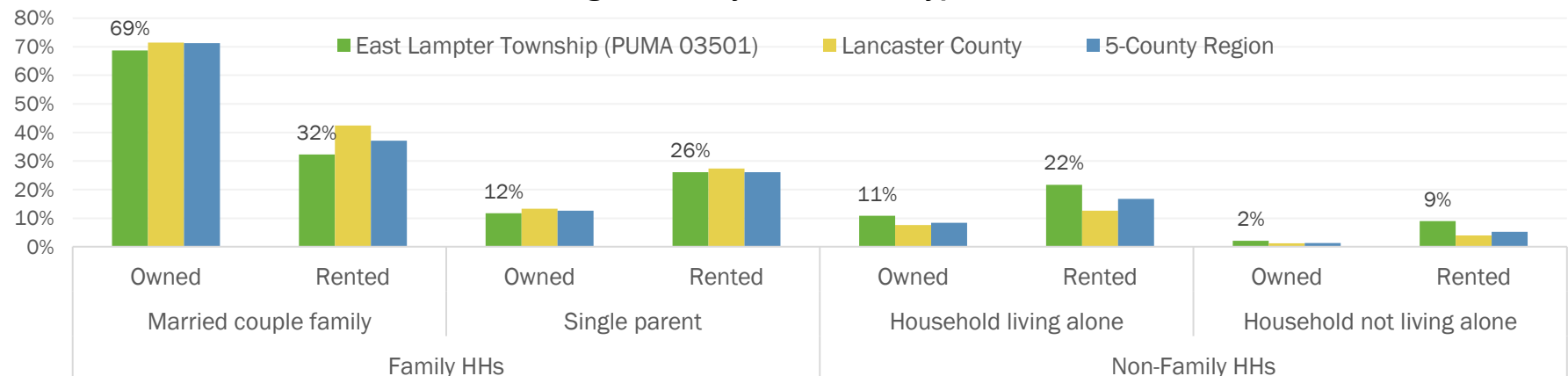


Source: 2021: ACS 5-Year Estimates, S2504, Physical Housing Characteristics for Occupied Housing Units

Housing Tenure by Household Type

Housing tenure varies by household type, with married couple families typically having the highest share of homeownership rates among family and non-family households. Married couples often benefit from having two sources of income, which can increase their purchasing power and make it easier to qualify for a mortgage. For example, in East Lampeter Township (here represented by the PUMA 03501), 69 percent of owner-occupied households were composed of married-couple families, compared to 12 percent of single-parent families in 2021. Renting is most common among non-family households, particularly householders living alone. For example, 22 percent of the township’s renter-occupied households were composed of persons living alone, compared to 11 percent of owner-occupied households. Compared to the county, the township has lower homeownership rates and higher renter rates among all household types, likely due to a higher share of rental housing stock.

Housing Tenure by Household Type, 2021



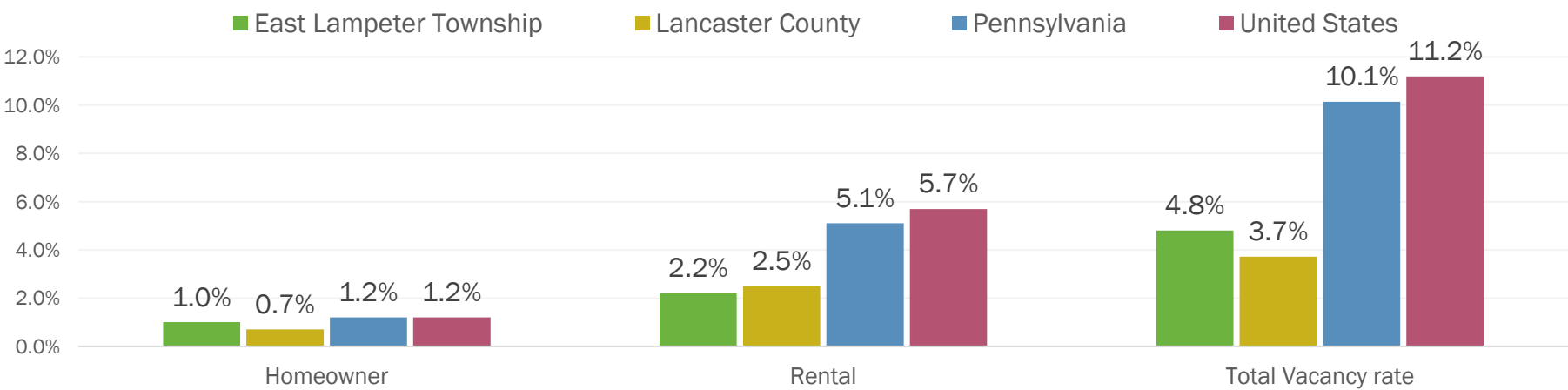
Note: Categories do not total 100% due to a share of households where type could not be determined. Public Use Microdata Areas (PUMAs) 03501 represents Lancaster County–Lancaster City, East Lampeter, Lancaster & West Lampeter Townships.

Source: IPUMS USA, University of Minnesota, American Community Survey, 2021

Housing Vacancy By Tenure

In general, a vacancy rate of between four and seven percent is an indicator of a relatively healthy housing market. While the average housing vacancy rate in East Lampeter (4.8 percent in 2021) is within the healthy range, this vacancy rate includes seasonal and other vacant units (units which are vacant due to a sale or leasing transition, repairs being conducted, or for personal reasons of the owner). The vacancy rate for ownership and rental units within the township was much lower (at 1.0 percent and 2.2 percent, respectively, in 2021). As part of its housing strategy, East Lampeter Township should inventory vacant units to determine the share of units needing repair in order to make them marketable for rent or sale. Given the tight inventory of available ownership and rental units in the township, such a strategy could yield a critical number of units at a relatively affordable investment.

Vacancy Rate Trends by Housing Tenure, 2021



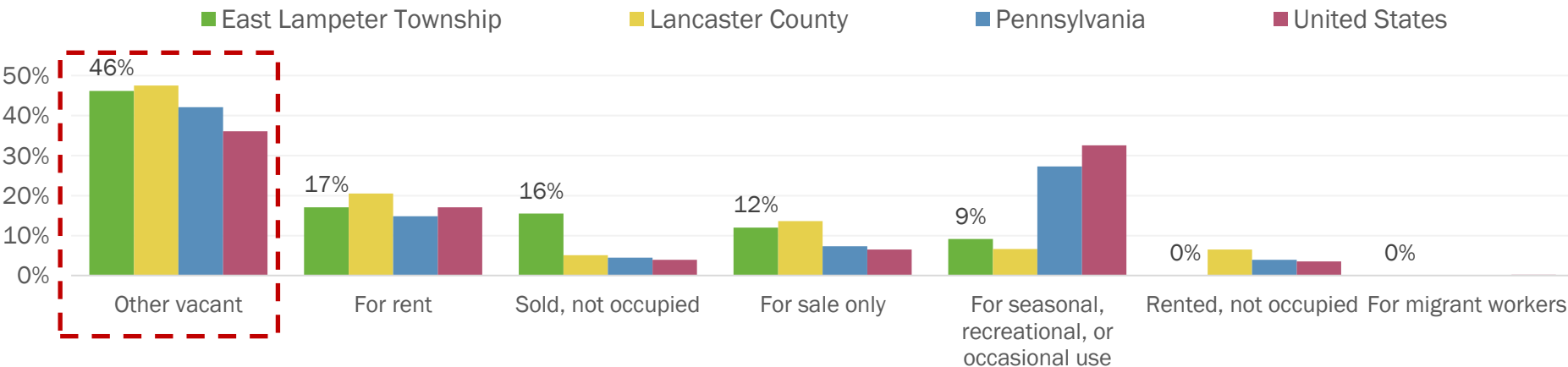
Note: Rental and homeowner vacancy rates do not include "other vacant" or "seasonal" units in the calculation of vacancy rates.

Source: American Community Survey 5-Year Estimates; 4ward Planning Inc., 2023

Detailed Housing Vacancy

The Census classifies vacant units into housing market classifications. For example, rental units are separated into vacant units offered "for rent," and those "rented, not occupied" (e.g., rent has been paid, but new renter has not moved in). Likewise, for-sale units are separated into vacant units offered "for sale only," and those "sold, not occupied" (e.g., unit has recently been sold but the new owner has not moved in). "For seasonal, recreational, or occasional use" units are vacant units used only in certain seasons or other occasional use. "Migrant units" (none in the township) are vacant units intended for migratory workers. If a vacant unit does not fall into any of the above classifications, it is classified as "other vacant" (e.g., owner that does not want to rent or sell; or house is being used for storage, being foreclosed upon, or being repaired or renovated). The township's share of "other vacant" units (46 percent of all vacant units or 146 units) is slightly lower than that in the county (48 percent). These "other vacant" units could represent foreclosed or unattended properties.

Detailed Vacancy Status, 2019



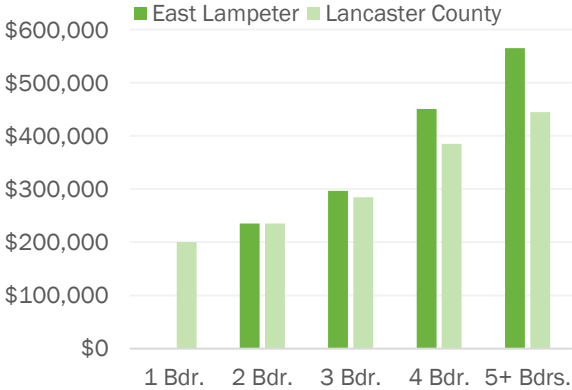
Source: American Community Survey 1-Year Estimates; 4ward Planning Inc., 2023

Housing Market Metrics

According to housing data provided by Rocket Homes Real Estate LLC, a national provider of residential real estate data, both East Lampeter Township and Lancaster County have a “sellers’ housing market,” which means prices tend to be higher and homes sell faster than the national average.

As of June 2023, the township’s median sale price per square foot (\$177 per square foot) was higher than that in the county (\$171 per square foot). Nevertheless, increasing year-over-year housing inventory and declining median sale prices suggest the township’s market may be showing signs of slowing compared to the previous year - likely due to rising interest rates that make purchasing a home increasingly unaffordable for potential home buyers. For example, in June 2023, there were 44 homes for sale in the township, compared to 38 in June 2022 (an increase of 15.8 percent). The average sale time also increased slightly from seven to nine days over the same period, while the median home sale price fell by 2.9 percent.

Median Sold Price By Bedroom Count, June 2023



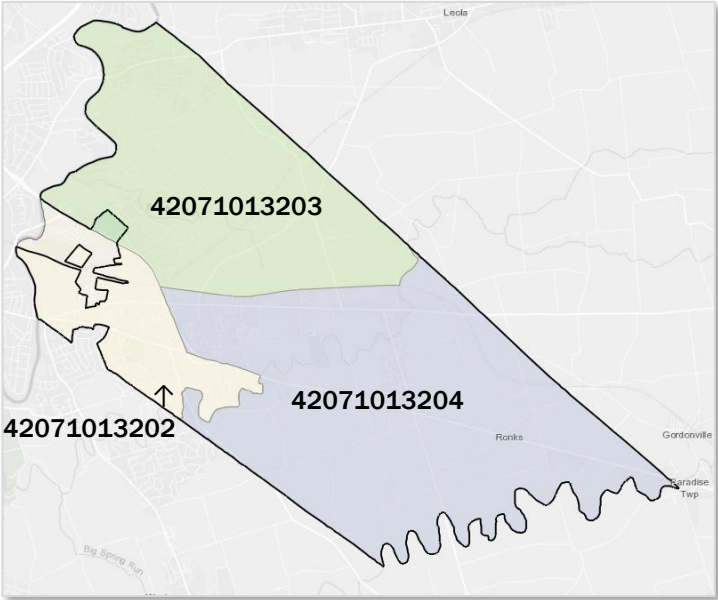
Median Sale Price Trends, June 2023

	Median Sale Price		Y-O-Y Change		Homes for Sale		Average Sale Time	
	Total	Per SF	Total	% Change	Number	% Change	Days	% Change
East Lampeter	\$316,500	\$177	-\$9,500	-2.9%	44	15.8%	9	29.9%
Lancaster County	\$300,304	\$171	\$24,194	8.8%	1,481	0.0%	15	-5.3%

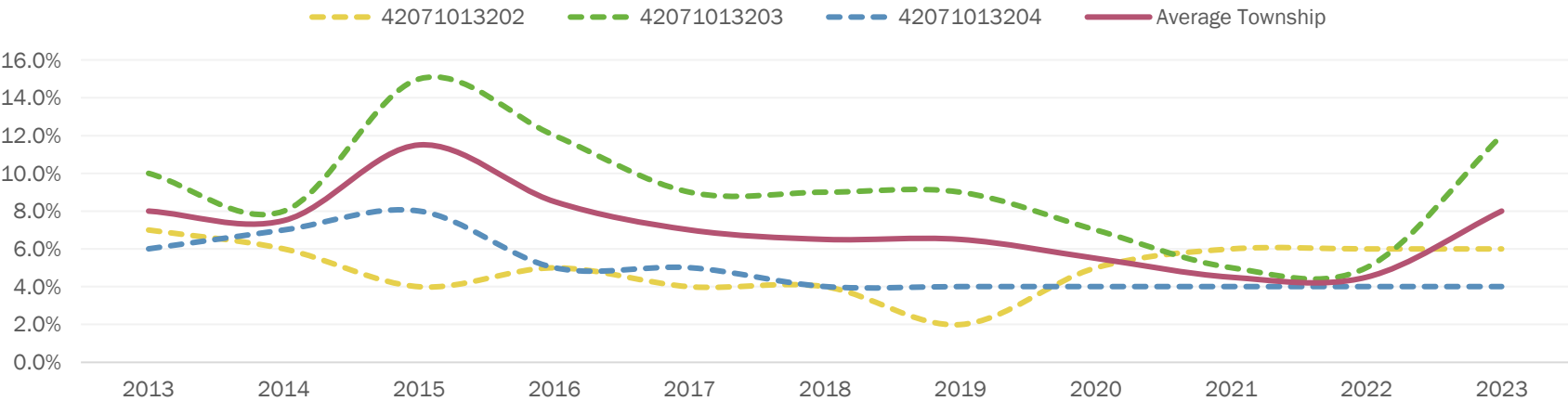
Source: Rocket Homes Real Estate LLC, June 2023

Residential Vacancies By Census Tract

Using HUD’s Aggregated U.S. Postal Service (USPS) Administrative Data on address residential vacancies, 4ward Planning examined residential vacancy trends in the township by Census Tract. Residential vacancies have been generally lower in the western portion of the township (census tract 42071013202) and higher in northern portion of the township (census tract 42071013203). More detailed housing vacancy data is provided by block group in the next section.



Residential Vacancy Rate



Note: Data is for first quarter of each year. Data is based on RES_RATIO metric provided.

Source: HUD, United States Postal Service (USPS)

Housing Pipeline & Projections

Key Findings: Housing Pipeline & Projections

Declining number of annual housing permits

According to housing permit trends for East Lampeter provided by the U.S. Census Bureau, the number of annual housing permits has been declining in the township over the last three decades. This decrease in new housing permits is likely due, in part, to the Great Recession and the subsequent housing crisis. It should be noted that not all units permitted are ultimately built.

1,420 units in the development pipeline

According to data provided by Lancaster County Planning Department and feedback from developers, there are approximately 1,420 units in the development pipeline likely to be built in East Lampeter Township by 2028. These units include the approximately 200 units as part of Phase 2 of the mixed-use Devon Creek project and approximately 480 apartment units as part of the Rockvale Redevelopment infill project. There are also two projects totaling 716 proposed units currently in final plan review, including the 628-unit proposed Greenfield North project.

Net demand for 720 more residential units by 2028

Largely due to existing pent-up demand from primary workers who commute into the township (94 percent of township workers) and replacement of physically obsolescent housing, there is currently a net demand for approximately 700 residential units in East Lampeter Township. By 2028, there will be an estimated net demand for approximately 720 residential units.

Methodology: Housing Pipeline & Projections

Based on historical data provided by the Census Bureau (e.g., Building Permits Survey), 4ward Planning examined residential building trends for the township. Additionally, we identified existing subsidized housing (including availability, new or future subsidized housing, and other dwellings which serve as transitional and emergency housing) and pending housing (proposed housing units, planned developments) based on data provided by local housing agencies and Lancaster County Planning Department.

Next, based on primary worker data provided by the U.S. Census Bureau, industry employment growth rate projections provided by the Pennsylvania Department of Labor and Industry for Lancaster County, and housing pipeline data provided by the Lancaster County Planning Department, 4ward Planning projected net housing demand for the township over a five-year period (2023 to 2028).

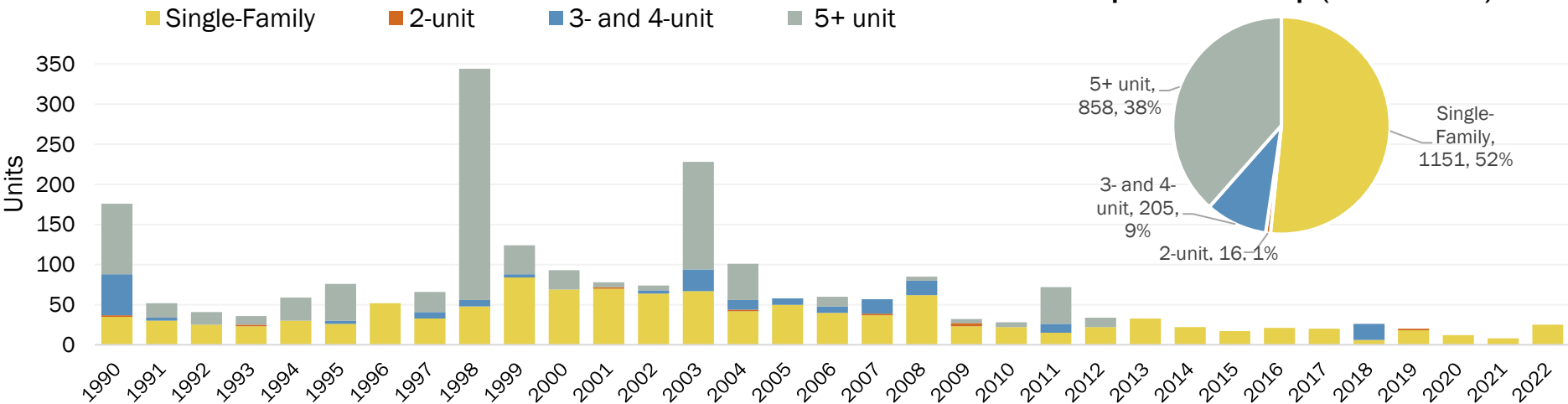
Housing Permit Trends: East Lampeter Township

The charts below illustrate housing permit trends for East Lampeter Township based on data provided by the U.S. Census Bureau. From 1990 to 2020, 2,230 housing units were permitted in the township, an average of 70 per year. The highest share of total units permitted since 1990 are characteristic of single-family housing. Notably, the number of annual housing permits has been declining over the last three decades. This decrease in new housing permits is likely due, in part, to the Great Recession and the subsequent housing crisis. It should be noted that not all units permitted are ultimately built.

Housing Permit Trends

	Total Permits	Per Year
1990-2000	1,026	103
2000-2010	866	87
2010-2020	293	29
2020-2022	45	15
Total/ Average	2,230	70

Housing Permit Trends: East Lampeter Township



Housing Permit Trends: East Lampeter Township (1980-2020)

Source: U.S. Census Bureau, State of the Cities Data Systems (SOCDS) Building Permits Database, 2023

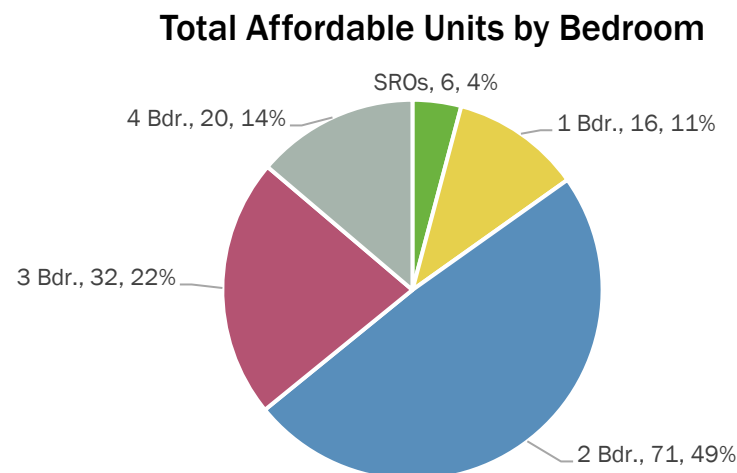
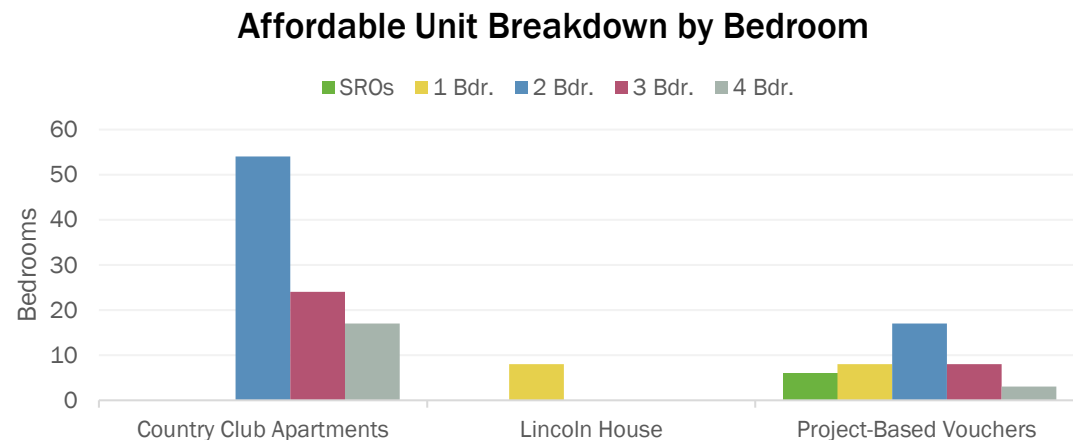
Affordable Housing: East Lampeter Township

Based on data provided by the Pennsylvania Housing Finance Agency (PHFA) and the Lancaster County Housing and Redevelopment Authorities (LCHRA), there are two affordable housing projects with 103 affordable housing units and 42 affordable housing vouchers available in East Lampeter Township with no additional affordable housing projects currently being planned.

- **Country Club Apartments:** Opened in October 2008 and operated by Community Basics Inc. (a non-profit community housing development organization), Country Club Apartments offers 95 units, composed of two-, three- and four-bedroom apartments. According to Community Basics, application waitlists for their properties can be several years long. As such, Community Basics has recently attempted to identify potential redevelopment properties in the Township.
- **Lincoln House:** In partnership with Community Basics, Inc., The Lodge (a local non-profit) opened the Lincoln House in 2003, becoming Lancaster County's first Permanent Supportive Housing Program for individuals who have a disability and experience homelessness. The former bed and breakfast site was renovated into eight affordable living units where residents lease their own room with a private bath, with shared kitchen, dining room, laundry, and living areas. These units are affordable, and residents must meet income eligibility criteria set forth by HUD.
- **Project-Based Vouchers (PBVs):** According to LCHRA's Housing Choice Voucher program, there are 42 tenants living in the Township who have vouchers, living in six Single Room Occupancy studios (SROs), eight one-bedrooms, 17 two-bedrooms, eight three-bedrooms, and three four-bedrooms units.

Source: Lancaster County Housing and Redevelopment Authorities, data as of 08/30/2023; PA Housing Finance Agency (PHFA), Commonwealth of Pennsylvania, Lancaster County Inventory of Affordable Housing, data as of 10/21/2022

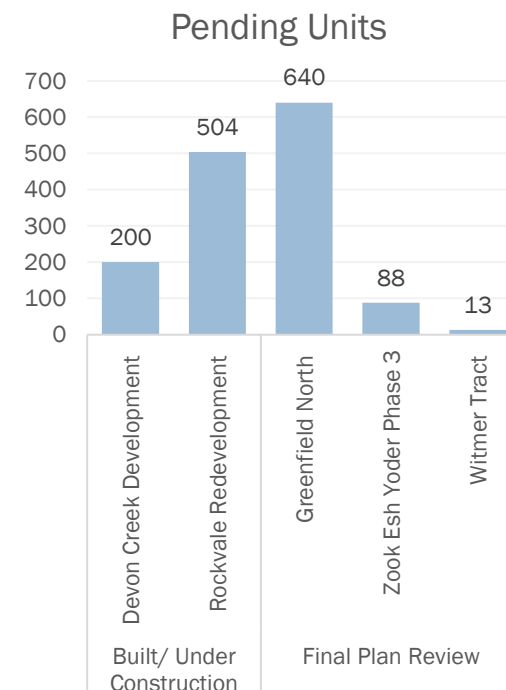
Affordable Housing: East Lampeter Township (continued)



Source: Lancaster County Housing and Redevelopment Authorities, data as of 08/30/2023; PA Housing Finance Agency (PHFA), Commonwealth of Pennsylvania, Lancaster County Inventory of Affordable Housing, data as of 10/21/2022

Housing Pipeline: East Lampeter Township

As presented below and in more detail on the following pages, there are approximately 1,420 units in the development pipeline within East Lampeter Township. These include the approximately 200 units as part of Phase 2 of the mixed-use Devon Creek project and 480 apartment units as part of the Rockvale Redevelopment project. According to data provided by Lancaster County Planning Department and interviews with developers, as of August 2023, there are also two projects totaling 716 proposed units currently in final plan review within the township, with the 628-unit proposed Greenfield North (Zook-Esh-Yoder Phase 3) project being the largest of the two (includes 600 apartments in four five-story elevated buildings and 28 townhomes). The three large-scale projects with more than 15 units are mapped on the following page.



Housing Pipeline: East Lampeter Township

Name	Planning Phase	Development Type	Residential Type	Bedroom Mix	Pending Units to be Built by 2028
Devon Creek Development	Partially Built	Subdivision	Mix of SF, duplex, townhouse, MF	Two-to-four-bedrooms	200*
Rockvale Redevelopment	Construction	Infill	Four-story apartments	One -to-three-bedrooms	480
Greenfield North (Zook-Esh-Yoder Phase 3)	Final Plan	Subdivision	Five-story apartments and townhomes	NA	628
Villages at Greenfield	Final Plan	Subdivision	Manufactured homes	NA	88
Laranbo Farms	Final Plan	Subdivision	SF detached homes	NA	13
1782 Lincoln Highway East	Final Plan	Infill	Apartments	NA	12
Total					1,421

*Assumes 200 of remaining 369 units will be built by 2028.

Sources: Online sources; Lancaster County Planning Department, data as of August 2023; developer interviews

Housing Pipeline: Large-Scale Projects



Housing Pipeline: East Lampeter Township (continued)

Units Pending Approval

- **Rockvale Redevelopment (Preparing Phase 1 Land Development Submission):** Located at the intersection of Lincoln Highway U.S. Route 30 and Hartman Bridge Road in the Commercial Redevelopment Overlay District, the 24-acre Shops @Rockvale shopping center redevelopment project is poised for its Phase 1A Land Development submission, likely occurring in October 2023. At full, two-phase buildout, the project will replace half the commercial space on the property with 15 four-story apartment buildings containing a total of 480 residential units. The planned apartment buildings are centered around a clubhouse, potentially allowing for the development of additional apartment buildings. Each building is planned to include a mix of one-, two-, and three-bedroom apartments rented at market rates.

Previously Approved Units

- **Devon Creek (Phase 2 Built):** Located on approximately 49 acres of land along New Holland Pike at the intersection of Hornig Road, phase one of the project (30 units) has been completed, with the remaining phases expected to be built out. Once completed, the project will offer approximately 400 units (mix of single-family, duplexes, townhouses, and multi-family residential housing) with 20,000 square feet of commercial use. According to Keystone Custom Homes, two- to four-bedroom homes built as phase one of the project are currently for sale, with asking sale prices starting in the \$500,000's.

Housing Pipeline: East Lampeter Township (continued)

Final Plan Review

- **Greenfield North (Zook-Esh-Yoder Phase 3):** Owned by High Real Estate Group, this project is located on 115 acres at the corner of Greenfield and Willow Roads. At buildout, the project will result in 628 market-rate units, including 600 apartments in four five-story elevated buildings and 28 townhomes. Commencement of site work is scheduled for 2023.
- **Villages at Greenfield (Phase 5):** Owned by High Real Estate Group, this phase of the manufactured housing community has received full land development approval and construction is mostly complete of the home lots, which will contain 88 manufactured units.
- **Laranbo Farms:** Owned by EG Stotzfus, this project is located on 10 acres of land on the west side of Mount Sidney Road south of Horseshoe Road. Once completed, this subdivision plan will add 13 new single-family detached homes.
- **1782 Lincoln Highway East:** Owned by Engel properties LLC, this project proposes the subdivision of an existing single-family lot and construction of a 12-unit apartment building as infill development on 1.1 acres of land on the southwest corner of Lincoln Highway East Route 462 and South Eastland Drive.

Pipeline Residential Developments: Devon Creek Development

Devon Creek Estates: New Homes for Sale in Lancaster, PA

Lancaster, PA 17601 | 4 - 5 | 2.5 - 4.5 | 1,792 - 2,996 sqft

Save

From the \$500,000's



Source: RGS Associates; Keystone Custom Home; Devon Creek Phase 2 Subdivision Plan 2023

Pipeline Residential Developments: Greenfield North



Source: High Associates

Pipeline Residential Developments: Rockvale Redevelopment



Source: Penn Live

Supply/Demand Analysis: Key Demand Scenario Assumptions

Housing inventory expected to grow by 1,460 units

Based on units in the pipeline, housing within the Township is projected to increase by 1,460 units from 2023 to 2028.

County will Maintain a Natural Average Annual Housing Vacancy Rate of Three Percent

These units represent the supply of units in a given market that are not leased or occupied, allowing for housing turnover.

Remaining Vacant Housing within the County is Physically Obsolescent or Unmarketable

With a projected housing vacancy rate of 4.3 percent, it is assumed the remaining share of vacant housing (1.3 percent) within the Township is not available for sale or for rent, but is vacant due to repairs, foreclosure, or other personal reasons.

Net Household Formation from 2023 to 2028 Based on Housing Pipeline

Based on units in the pipeline and three percent vacancy, households within East Lampeter Township are projected to increase by approximately 1,420 from 2023 to 2028.

Employment Growth Based on Average Annual Growth Rate of 0.4 Percent over 2020 Base Employment

Based on 2020 primary worker data provided by the U.S. Census Bureau and average 2020 to 2030 industry employment growth rate projections provided by the PA Department of Labor and Industry for Lancaster County, primary workers within the Township are expected to increase by 400 from 2023 to 2028 (by 0.5 percent per year).

Five of Every 100 Township Workers Would Trade Commute for Adequate Housing Choice

Currently, approximately 94 out of every 100 primary workers commute from outside the Township. It is assumed that five out of every 100 of these workers would trade their commutes if adequate housing choice was available.

1.0 Percent of the Township's Remaining Housing Stock Becomes Obsolete Annually

All housing stock gradually wears out over time, and, on average, one out of every 100 units becomes obsolete annually.

Supply/Demand Analysis: East Lampeter Township

Largely due to existing pent-up demand from primary workers who commute into the township (94 percent of township workers) and replacement of physically obsolescent housing, there is currently a net demand for approximately 700 residential units in East Lampeter Township. In addition to housing in the development pipeline (1,420 units), by 2028, there will be an estimated net demand for approximately 720 residential units.

Net Dwelling Unit (DU) Demand Through 2028

	2023	2028
Housing Demand Metrics		
<i>Estimated Households in East Lampeter (Based on Pipeline Units and 3% Vacancy)</i>	6,900	8,320
Estimated Primary Workers in East Lampeter (0.5% growth rate)	15,000	15,400
Estimated Primary Workers Residing Outside East Lampeter (94%)	14,060	14,430
<i>Estimated Pent-Up Housing Unit Demand from Commuting Area Workers (5%)</i>	700	720
<i>Estimated Number of Naturally Occurring Vacant Housing Units (3%)</i>	220	260
Estimated Aggregate Housing Unit Demand in East Lampeter	7,820	9,300
Housing Supply Metrics		
Estimated Housing Units in East Lampeter (Based on Pipeline Units)	7,210	8,670
Physically Obsolescent Units (1.2% of total units, 1% annual obsolescence rate)	90	90
New Units Added in East Lampeter (Based on Pipeline Units)		1,420
Estimated Net Marketable Housing Units in East Lampeter	7,120	8,540
Net Housing Demand/Supply Calculation		
<i>Estimated Aggregate Housing Unit Demand in East Lampeter</i>	7,820	9,260
<i>Subtract Estimated Net Marketable Housing Units in East Lampeter</i>	7,120	8,540
Net Housing Unit Demand/(Excess Units)	700	720

Source: 4ward Planning Inc. 2023

Comparative Analysis of Township Housing Metrics

Key Findings: Comparative Analysis of Township Housing Metrics

Most comparable to Lancaster Township but less dense

The median age and average household size in East Lampeter Township (40 years and 2.5 persons, respectively) is most comparable to Lancaster Township (39 years and 2.5 persons, respectively). Notably, although Lancaster Township has a population (18,790 people) relatively comparable to East Lampeter Township (17,460 people), housing in Lancaster Township is much denser, with 1,270 housing units per square mile compared to just 367 in East Lampeter Township.

Relatively high home property value to income ratios

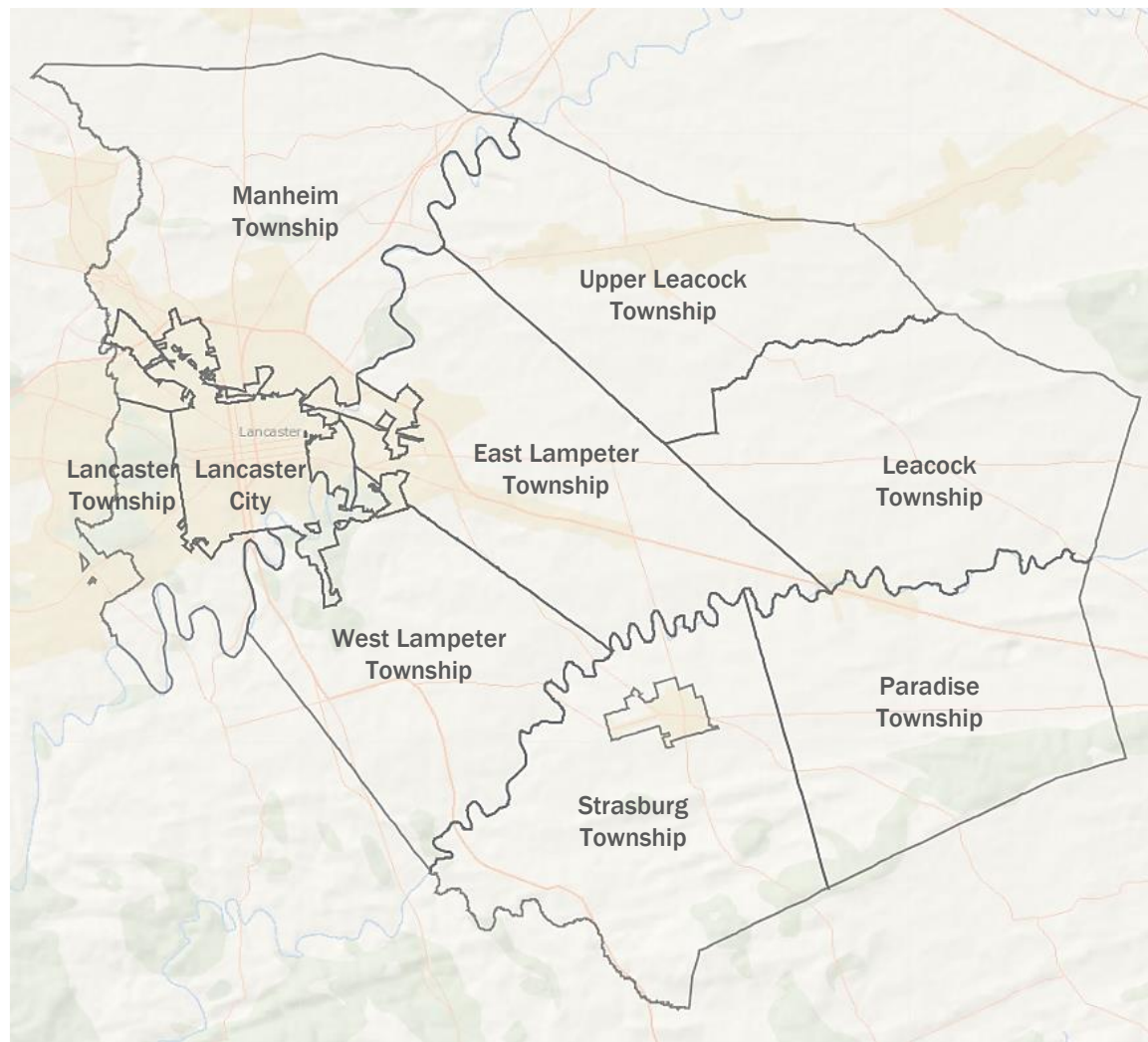
The rule of thumb long used by real estate agents and homebuyers is that you can afford a house if its price is equivalent to roughly 2.6 years of your household income. In 2023, the ratio among immediately adjacent municipalities ranges from as low as 3.1 in Lancaster City to 5.1 in Leacock Township, suggesting that home ownership in the region may be beyond reach for many local households. East Lampeter Township has a relatively high ratio of median home value to median household income (4.4).

Average share of severely rent-burdened households

Compared to Lancaster Township, gross rent (includes rent and utilities) in East Lampeter Township is slightly higher, although the share of households with severe housing cost burden is lower, suggesting households in East Lampeter Township likely have higher incomes.

Methodology: Comparative Analysis of Township Housing Metrics

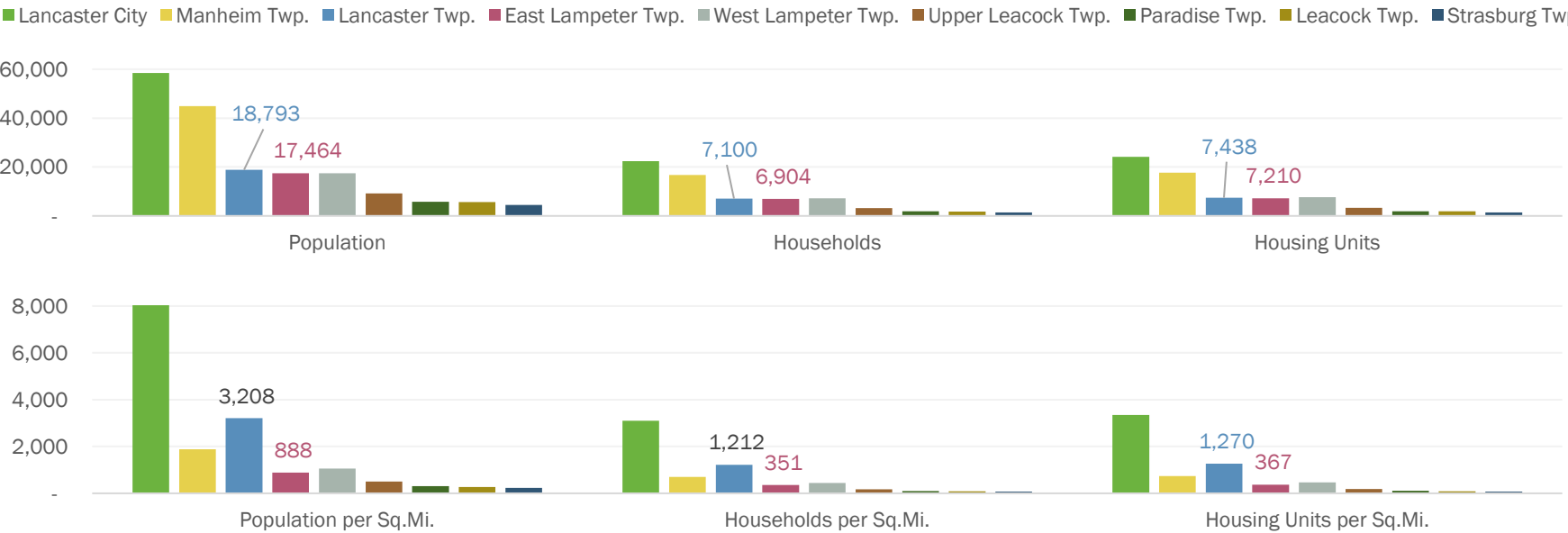
As a means of understanding East Lampeter Township's competitive position within the county's housing market, 4ward Planning performed a high-level comparative analysis of key housing and socio-economic metrics for the immediately adjacent municipalities, as well as East Lampeter Township.



Demographics

The chart below compares key population, household, and housing metrics for the eight immediately adjacent municipalities, with the values in red representing East Lampeter Township. The first chart below ranks the municipalities by total population, with Lancaster City being the most populous (58,425 people), and Strasburg Township being the least populous (4,484 people). Notably, although Lancaster Township has a population (18,790 people) relatively comparable to East Lampeter Township (17,460 people), housing in Lancaster Township (presented below in blue) is much denser, with 1,270 housing units per square mile compared to just 367 in East Lampeter Township.

Demographic Comparison, 2023

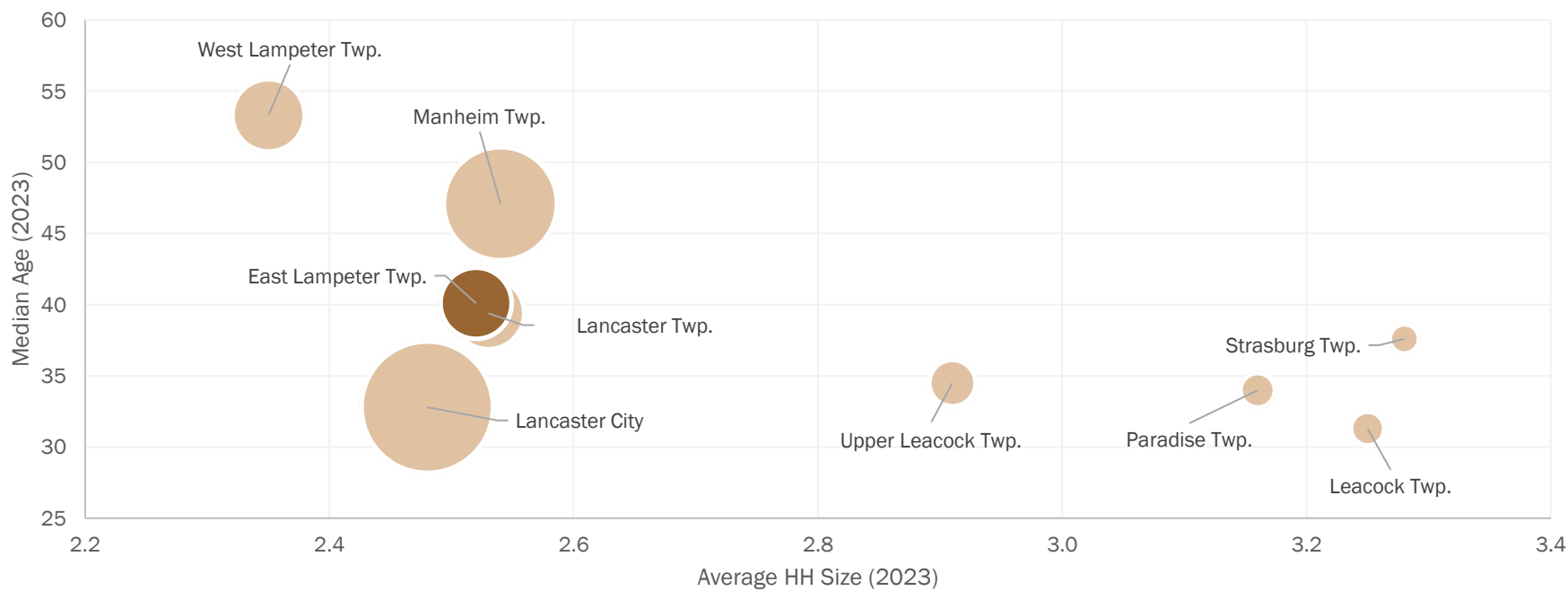


Source: Esri, 2023

Demographics (continued)

Like population, the median age and average household size in East Lampeter Township (40 years and 2.5 persons, respectively) is most comparable to Lancaster Township (39 years and 2.5 persons, respectively). In general, the smaller municipalities have the largest average household size (as high as 3.3 in Leacock and Strasburg Townships), while West Lampeter has the highest median age (53 years).

Demographics

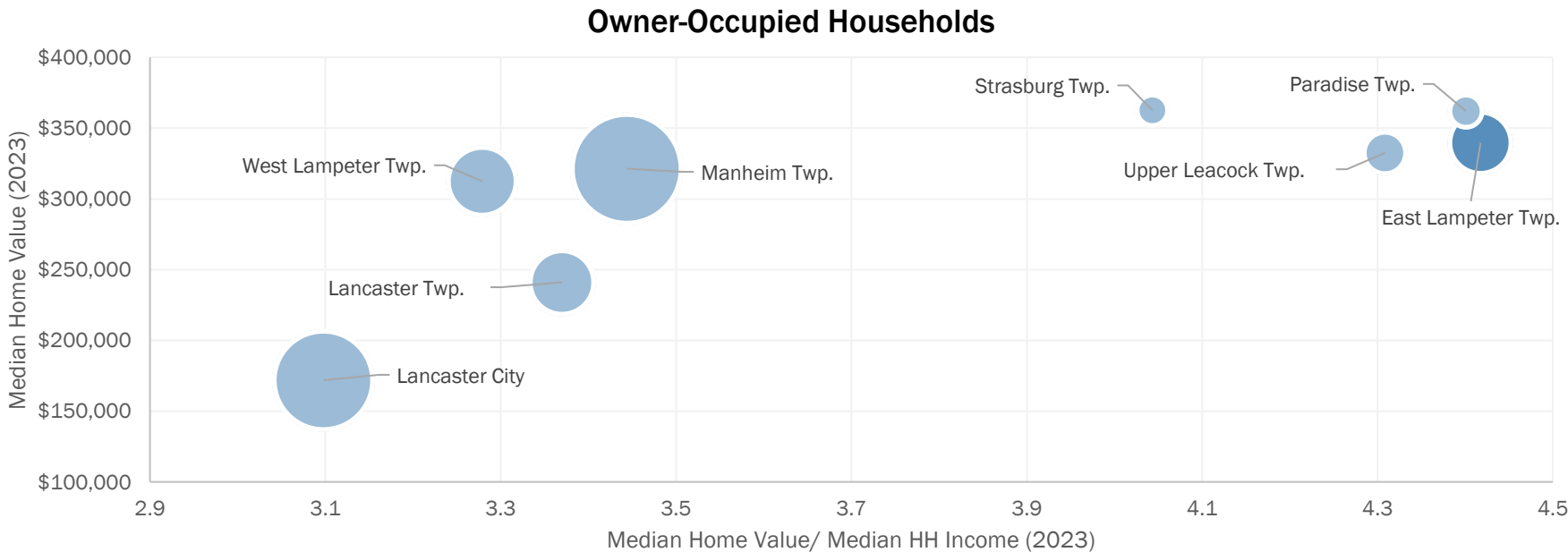


*Note: Bubble size represents total households.

Source: Esri, 2023

Housing Costs: Owner-Occupied Households

The rule of thumb long used by real estate agents and homebuyers is that you can afford a house if its price is equivalent to roughly 2.6 years of your household income. That ratio is based on historical nationwide averages under healthy economic conditions. In 2023, the ratio among immediately adjacent municipalities ranges from as low as 3.1 in Lancaster City to 5.1 in Leacock Township, suggesting that home ownership in the region may be beyond reach for many local households. Compared to other immediately adjacent municipalities, East Lampeter has a relatively high ratio of median home value to median household income (4.4).

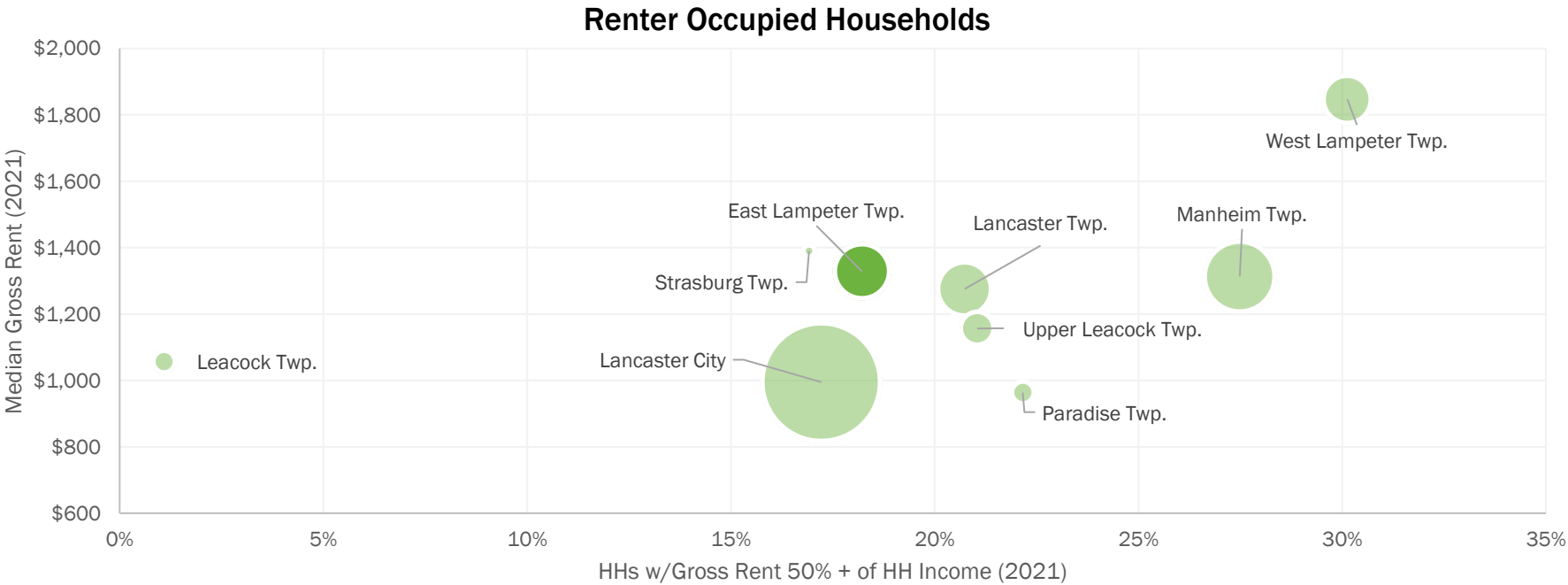


*Note: Bubble size represents total owner-occupied housing units.

Source: Esri, 2023

Housing Costs: Renter-Occupied Households

West Lampeter has the highest share of severely rent-burdened renter households, with gross rent (includes rent and utilities) equivalent to more than half of a household’s monthly income (30 percent), while Leacock Township has the lowest share of severely rent-burdened renter households (one percent). Compared to Lancaster Township, gross rents in East Lampeter are slightly higher, although the share of households with severe housing cost burden is lower - suggesting renter households in East Lampeter likely have higher incomes.

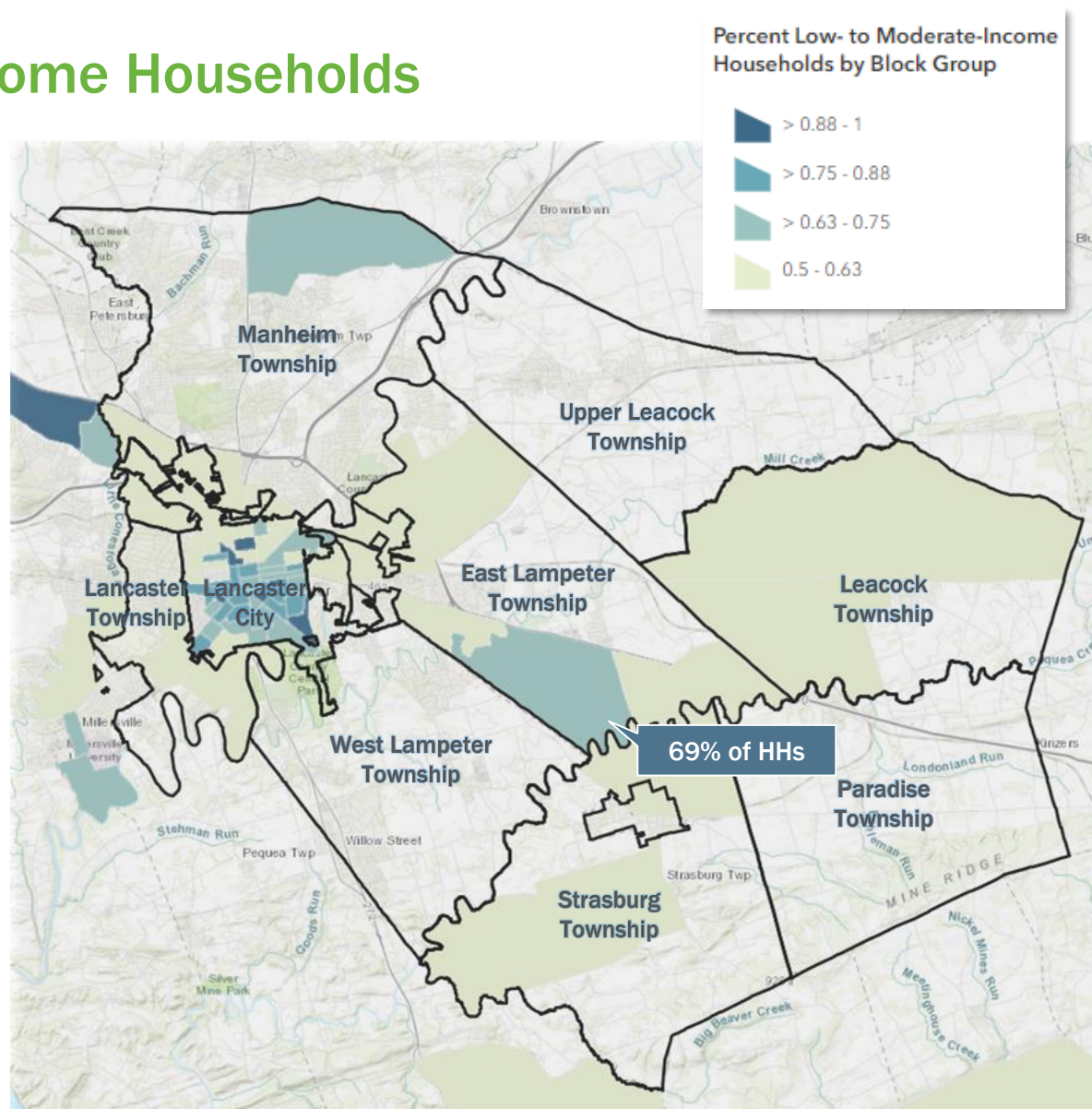


*Note: Bubble size represents total renter-occupied housing units.

Source: Esri, 2023

Low- and Moderate-Income Households

HUD identifies U.S. Census Block Groups by share of households earning less than 80 percent of the Area Median Income (AMI) based on data from the 2011-2015 American Community Survey (ACS). The map to the right identifies block groups in which 50 percent or more of households earn less than 80 percent of the AMI. The block group in the southwest section of the township has as much as 69 percent of households earning less than 80 percent of AMI.



Source: U.S. Department of Housing and Urban Development, Low to Moderate Income Population by Block Group

Identifying Financial Strengths & Challenges of Local Housing

Key Findings: Financial Strengths & Challenges of Local Housing

Recent decline in loan applications in township

According to HMDA data for East Lampeter Township, the number of loan applications decreased dramatically from 2021 to 2022, likely due to the Federal Reserve increasing interest rates in response to rising inflation. In 2022, approximately 643 loan applications were received in the township – 283 fewer than were received in 2021, but five more than were received in 2018.

Insufficient debt-to-income ratios most likely reason for denial

In 2022, 54 percent of the denied home purchase and refinance loan applications in the township were due to insufficient debt-to-income (DTI) ratios, a share higher than that in the county (36 percent). A high share of loan applications being denied by insufficient DTI ratios indicates that some potential homebuyers in the township have insufficient incomes to qualify for home loans.

Methodology: Financial Strengths & Challenges of Local Housing

A concentration of housing loan application declinations can serve as an early warning sign that a particular housing market may be experiencing challenges (e.g., most often due to borrower's insufficient DTI ratios or poor credit). Conversely, a relatively high concentration of home loans and refinancing approvals suggest a healthy housing market area. Consequently, identifying and understanding home loan-related activity will permit greater insight into where there are or may be housing market challenges.

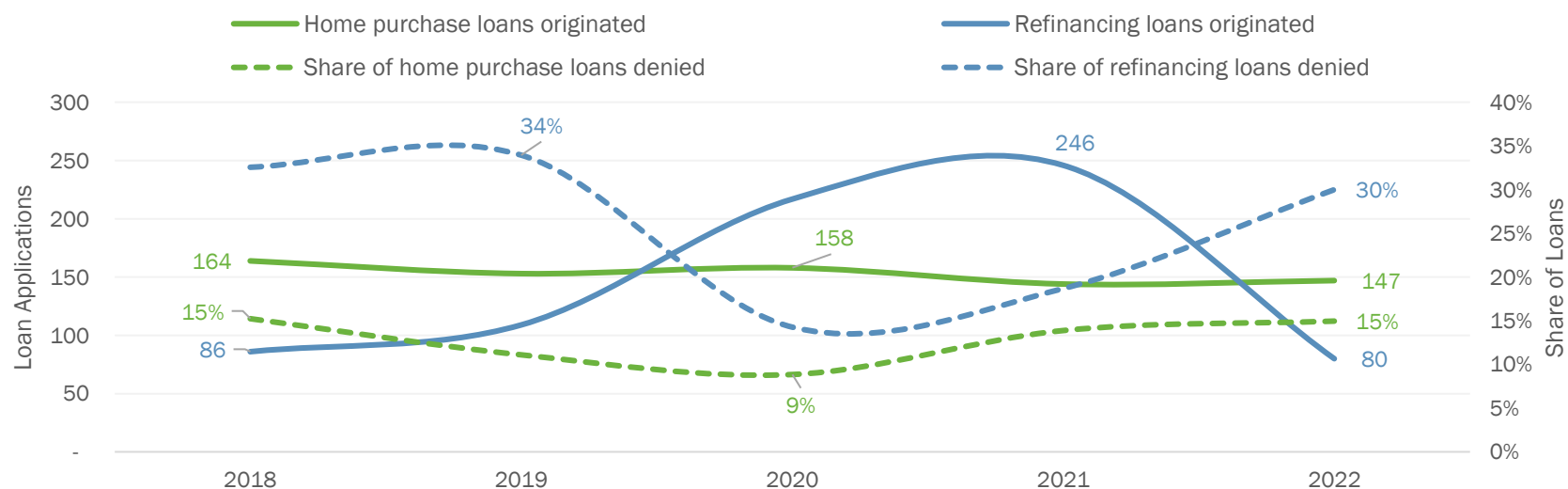
The Home Mortgage Disclosure Act (HMDA) requires many financial institutions to maintain, report, and publicly disclose information about mortgages. Based on HMDA data sourced from the Consumer Financial Protection Bureau, 4ward Planning examined Housing Mortgage Disclosure Act (HMDA) data within East Lampeter Township, by year and Census Tract, including:

- Number of home purchase applications submitted
- Number of declined home purchase applications and reasons for denial
- Number of refinancing applications submitted
- Number of declined refinancing applications and reasons for denial

Loan Applications by Outcome: East Lampeter Township

Most notably, according to HMDA trend data for East Lampeter Township, the number of home refinance loan applications decreased dramatically from 2021 to 2022, while the share of home refinance loan denials increased, likely due to the Federal Reserve increasing interest rates in response to rising inflation.* The number of home purchase loans has been slowly declining within the township as well, while the share of home purchase loan denials in 2022 was the same as it was in 2018 (15 percent of home purchase loans are denied).

Loan Applications Trends by Purpose: East Lampeter



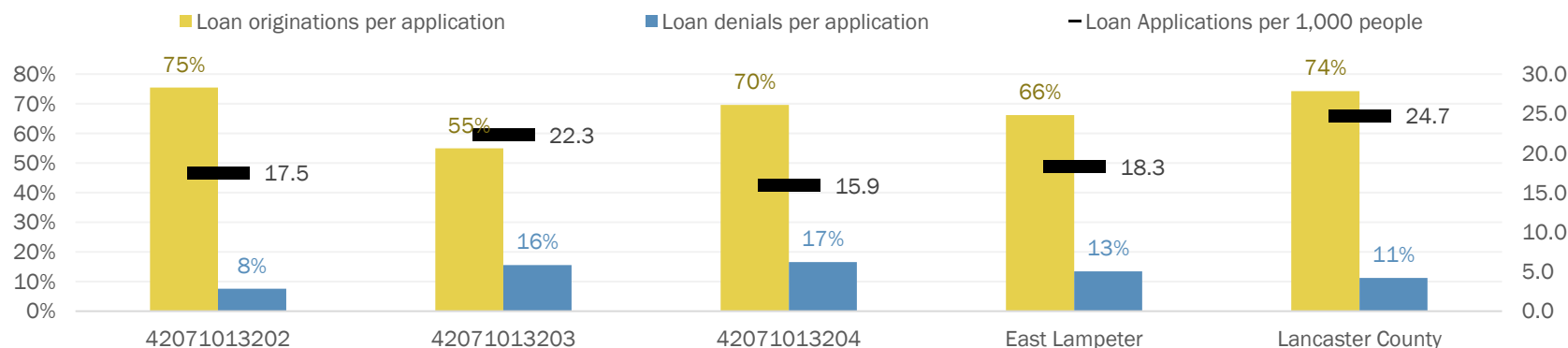
*From 2021 to 2022, the average 30-year fixed mortgage rate rose from 3.0 to 5.3 percent, according to economic data provided by the Federal Reserve.

Source: Home Mortgage Disclosure Act; Freddie Mac

Loan Applications by Outcome: East Lampeter (continued)

In 2022, there were 357 home purchase and refinance loan applications in the township, with 66 percent of these loans originated and 13 percent of these loans denied (other reasons a loan may not originate are due to an application being withdrawn, or a file closed for incompleteness, etc.). On a per person basis, the township had 18.3 loan applications per 1,000 people, lower than that in the county (24.7 per 1,000 people). Within the township, the census tract located in the northern portion of the township (42071013203) had the highest loan application ratio (22.3 per 1,000 people) but the lowest share of loan applications originated per application (55 percent). Conversely, while the census tract located in the southeastern portion of the township (42071013204) had the lowest loan application ratio (15.9 per 1,000 people) and the highest share of loan denials per applicant. In some cases, a high rate of loan applications might also indicate an influx of real estate investors looking to buy properties in the area.

Loan Applications, Originations, and Denials, 2022

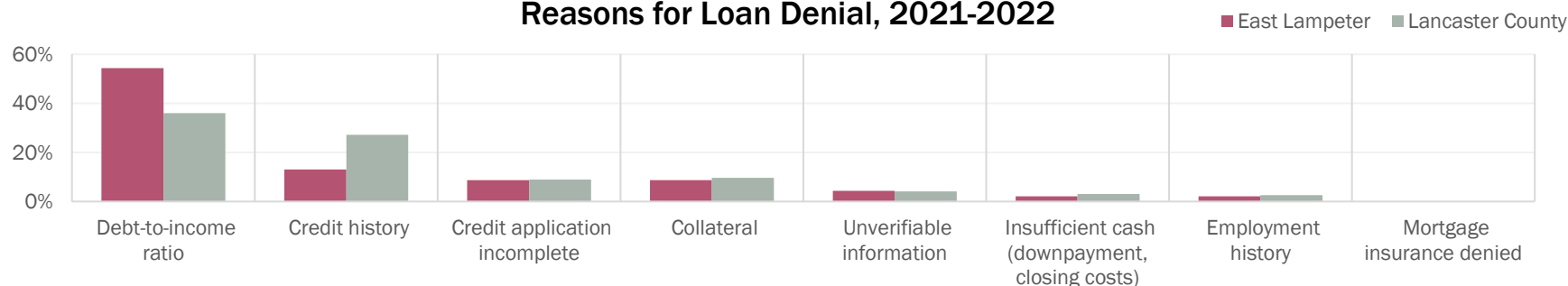


Source: Home Mortgage Disclosure Act; Freddie Mac

Loan Application Denials by Reason: East Lampeter Township

In 2022, 54 percent of the denied home purchase and refinance loan applications in the township were due to insufficient DTI ratios (the percentage of gross monthly income that goes to paying monthly debt payments and is used by lenders to determine borrowing risk), 13 percent were due to bad credit history, nine percent were due to incomplete credit applications, and nine percent were due to lack of collateral (an item of value pledged to secure a loan such as a mortgage or car loan). Compared to Lancaster County, a higher percent of the denied loan applications in the township were due to insufficient debt to income ratios, while the county had a higher percent of the denied loan applications due to bad credit history. A high share of loan applications being denied by insufficient DTI ratios indicates that some potential homebuyers in the township have insufficient income to qualify for a loan to purchase a home.

Reasons for Loan Denial, 2021-2022



	Debt-to-income ratio	Credit history	Credit application incomplete	Collateral	Unverifiable information	Insufficient cash (downpayment, closing costs)	Employment history	Total Denied Applications
Home purchase	13	2	1	2	-	1	1	22
Refinancing	12	4	3	2	2	-	-	24
Total Township	25	6	4	4	2	1	1	46

Source: Home Mortgage Disclosure Act; Freddie Mac

Multi-Family Development Opportunities

Key Findings: Buildable Land by Zoning District

614 acres of buildable land zoned to allow residential development

According to buildable land data identified in the current Comprehensive Plan for Lancaster County and zoning data provided by East Lampeter Township, there is approximately 614 acres of buildable land in East Lampeter Township, with 587 acres zoned to allow residential development. Just 99 acres of buildable land allows multi-family by right with just 39 of these acres located on large parcels of four or more acres in size.

Zoning District	Buildable Land Acres	Buildable Land Acres on Large Parcels (4+ Acres)
Agricultural (AG)	7.6	
Low Density Residential (R-1)	202.2	185.6
Medium Density Residential (R-2)	119.6	64.2
High Density Residential (R-3)	38.5	31.8
Neighborhood Commercial (C-1)	9.5	7.7
General Commercial (C-2)	2.9	
Regional Commercial (C-3)	3.7	
Light Industrial (I-1)	101.1	97.5
General Industrial (I-2)	26.9	24.6
Business Park (BP)	41.1	23.0
Mixed Use (MU)	9.6	
Bird-In-Hand (BH)	6.1	
Village General (VG)	13.9	13.5
Village Commercial (VC)	19.8	14.3
Village Residential (VR)	11.8	7.5
Total	614.2	469.6
Allows Townhomes	269.9	161.9
Allows Townhomes by Right	218.2	126.7
Allows Townhomes with Special Exception	51.6	35.2
Allows Multifamily	150.3	97.7
Allows Multifamily by Right	98.7	39.4
Allows Multifamily with Special Exception	51.6	35.2
Allows Residential	587.3	445.0

Source: Comprehensive Plan for Lancaster County; East Lampeter Township Zoning Ordinance of 2016, as amended on September 21, 2020

Methodology: Multi-Family Development Opportunities

To identify potential residential development opportunities consistent with the Lancaster County's Comprehensive Plan and priority growth areas, 4ward Planning identified "Buildable Land" within the county's urban and village growth boundaries (UGAs and VGAs), which have some existing or planned infrastructure (sewer service, and sometimes water) to support growth. Based on conversations with East Lampeter Township, various buildable land parcels were removed due to flood hazards, low probability of development, or pending development plans.

To further evaluate potential redevelopment opportunity sites based on access to existing infrastructure and services, 4ward Planning identified parks and created a quarter-mile buffer from existing bus stops to identify areas most appropriate for multi-family residential development.

Large parcels over four acres were identified, as these sites could potentially accommodate larger-scale residential development opportunities (e.g., 15 units per acre). Next, 4ward Planning summarized buildable land parcel by zoning permitting residential development (either by right or with special exception).

Water & Wastewater Service

Legend

Water service areas



Wastewater service areas



East Lampeter Township

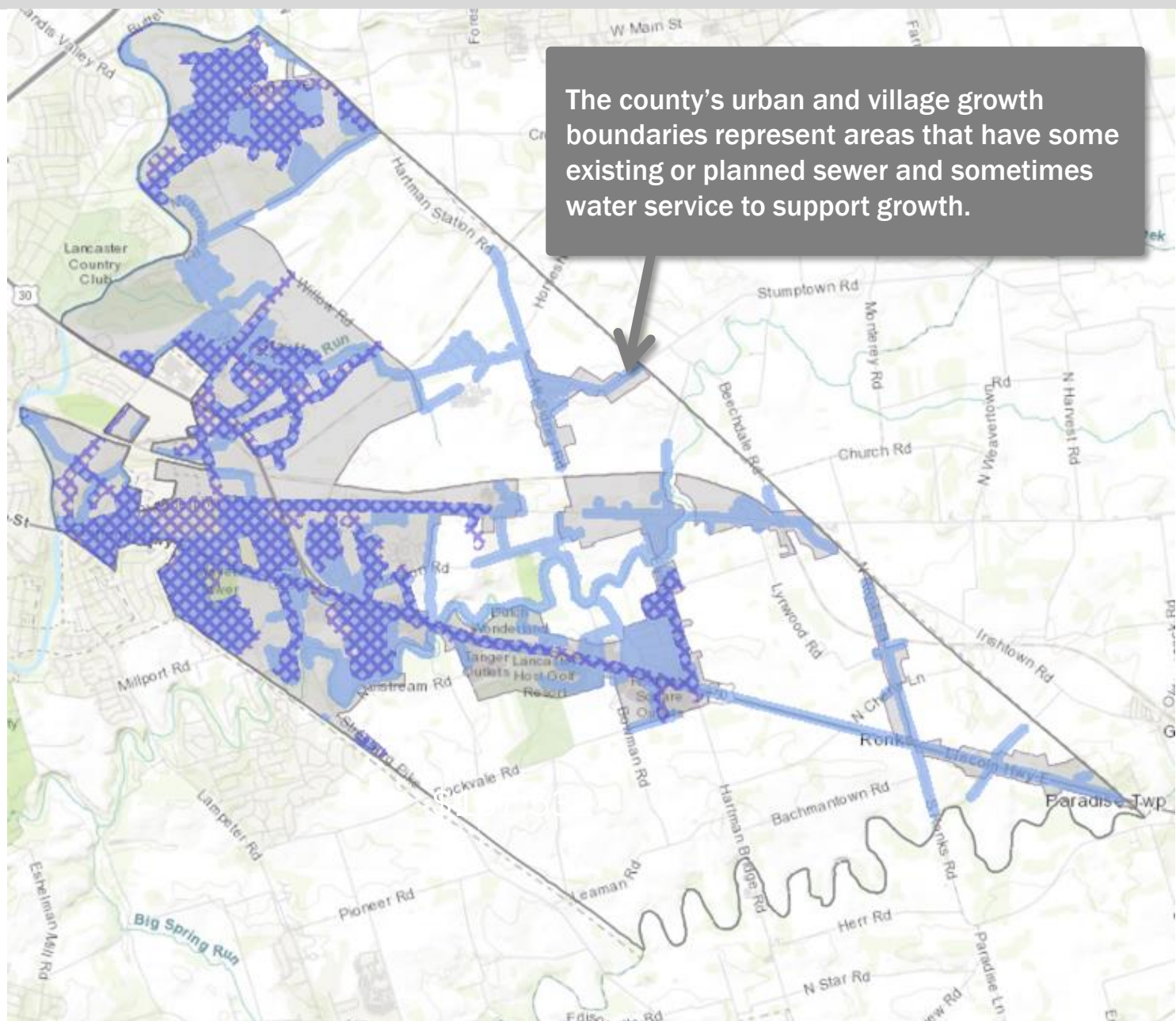


Urban and Village Growth Boundaries



Source: Lancaster County Planning Department, 2023

The county's urban and village growth boundaries represent areas that have some existing or planned sewer and sometimes water service to support growth.



Buildable Land

Legend

Township Housing Pipeline Projects



Buildable Land in Township with Zoning

-  Agricultural (AG)
-  Low Density Residential (R-1)
-  Medium Density Residential (R-2)
-  High Density Residential (R-3)
-  Neighborhood Commercial (C-1)
-  General Commercial (C-2)
-  Light Industrial (I-1)
-  General Industrial (I-2)
-  Business Park (BP)
-  General Industrial (I-2)
-  Mixed Use (MU)
-  Bird-In-Hand (BH)
-  Village Commercial (VC)
-  Village Residential (VR)
-  Village General (VG)

Quarter Mile Bus Stop Buffer



Buildable Land in Township -4+ Acres



Parks



Devon Creek

Greenfield North

Large parcels over four acres in size represent potential large-scale redevelopment opportunities.

Parcels within a quarter-mile of bus service or a park are most appropriate for multi-family residential development.

Rockvale Redevelopment

Source: Lancaster County Planning Department, 2023

Flood Hazard Areas

Legend

FEMA 100-Year Flood Zones



FEMA Flood Hazard Areas

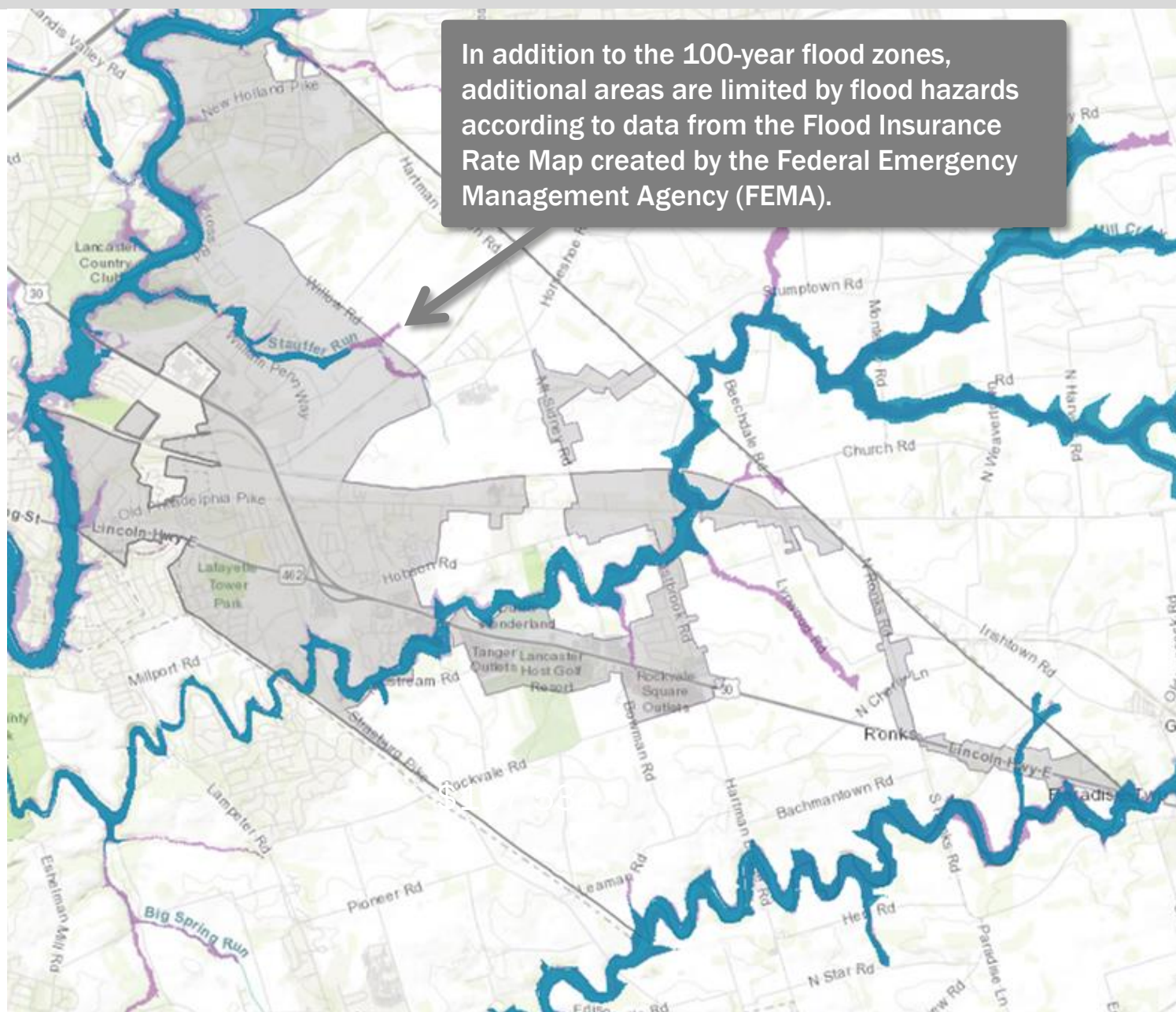
- 1% Annual Chance Flood Hazard
Regulatory Floodway
Area with Reduced Risk Due to Levee
Special Floodway
0.2% Annual Chance Flood Hazard
Future Conditions 1% Annual Chance
Flood Hazard

Urban and Village Growth Boundaries



Sources: Federal Emergency Management Agency, USA Flood Hazard Areas; Lancaster County Planning Department, 2023

In addition to the 100-year flood zones, additional areas are limited by flood hazards according to data from the Flood Insurance Rate Map created by the Federal Emergency Management Agency (FEMA).



Zoning Districts by Permitted Residential Uses

The table below summarizes permitted residential development by zoning district in East Lampeter Township. For example, while single family (SF) development is permitted in all zoning district except one (I-2), townhomes are permitted by right in five zoning districts (R-2, R-3, C-1, BP, and MU), and multifamily development is permitted by right in four zoning districts (R-3, C-1, BP, and MU). Both townhomes and multifamily are permitted with special exception in the four zoning districts (BH, VG, VC, and VR) located in the Village Growth Boundaries (VGB).

Zoning District	Primary Residential Uses Permitted			Max Height (Ft.)***	Minimum Lot Size (Sq. Ft.)				Maximum Lot Size (Sq. Ft.)			
	SF Detached	Townhomes	Multi-Family (MF)		SF Detached	SF Attached	Town-homes	MF	SF Detached	SF Attached	Town-homes	MF
Agricultural (AG)	By Right	X	X	35-50	22,500***	X	X	X	87,120***	X	X	X
Low Density Residential (R-1)	By Right	X	X	35-50	22,500***	X	X	X	87,120***	X	X	X
Medium Density Residential (R-2)	By Right*	By Right	X	35-50	7,500	6,000	3,500	X	12,000	-	-	X
High Density Residential (R-3)	By Right*	By Right	By Right	60-75	6,500	5,000	3,500	3,000	12,000	-	-	-
Neighborhood Commercial (C-1)	By Right*	By Right	By Right	40-50	-	5,000	3,500	3,000	-	-	-	-
General Commercial (C-2)	By Right**	X	X	50-65	X	X	X	X	X	X	X	X
Regional Commercial (C-3)	By Right**	X	X	70-95	X	X	X	X	X	-	X	X
Light Industrial (I-1)	By Right**	X	X	50-65	X	X	X	X	X	-	X	X
General Industrial (I-2)	X	X	X	70-95	X	X	X	X	X	X	X	X
Business Park (BP)	By Right**	By Right	By Right	70-95	X	X	3,000	2,500	X	-	-	-
Mixed Use (MU)	By Right*	By Right	By Right	50-60	10,000	5,000	3,750	3,000	None	-	-	-
Bird-In-Hand (BH)	By Right*	Special Exception	Special Exception	40-50	7,500-12,000***	5,000	3,750	3,500 per unit (12,000 lot)	12,000-40,000***	-	-	-
Village General (VG)	By Right*	Special Exception	Special Exception	40-50	7,500-12,000***	5,000	3,750	3,500	-	-	-	-
Village Commercial (VC)	By Right*	Special Exception	Special Exception	40-50	7,500-12,000***	5,000	3,750	3,500	-	-	-	-
Village Residential (VR)	By Right*	Special Exception	Special Exception	40-50	7,500-12,000***	5,000	3,500	3,000	-	-	-	-

* detached and attached ** which existed prior to adoption of this ordinance ***special requirements

Source: East Lampeter Township Zoning Ordinance of 2016, as amended on September 21, 2020.

Building Land Parcels: Low & Medium Density Residential



Building Land Parcels: Business Park (BP)

Large buildable land parcels zoned BP where multi-family development is allowed by right but located on the outer edge of the UGB, further from existing bus service

4.5-acre buildable land parcel zoned BP located closer to existing bus service

Potential smaller-scale, multi-family residential infill opportunities



Building Land Parcels: Medium Density Residential



Cluster of large buildable land parcels zoned for Medium Density Residential (R-2) but Mellinger Mennonite Cemetery is in the middle

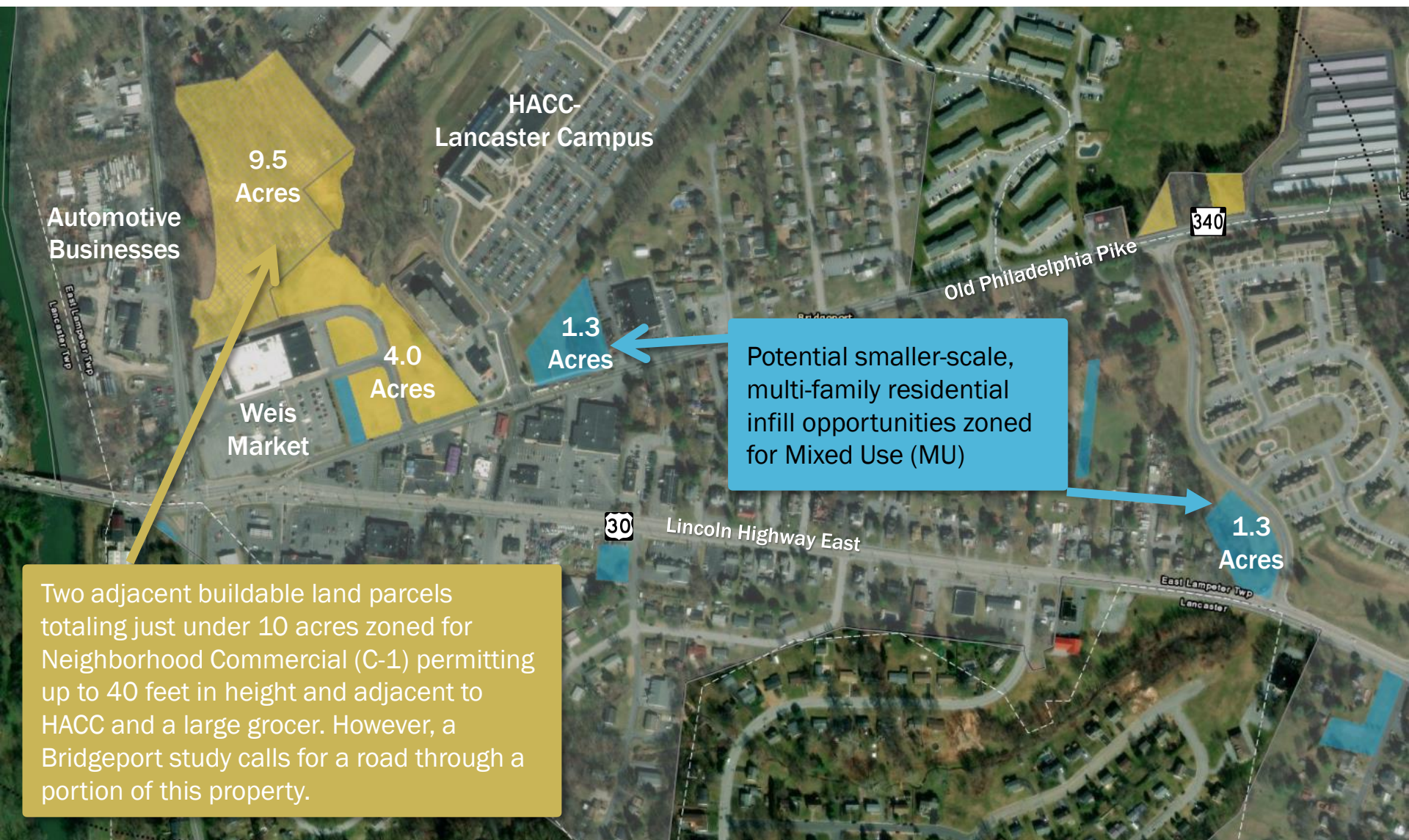
Building Land Parcels: Medium & High Density Residential

Large buildable land parcels zoned for Medium Density Residential (R-2) located between single-family and garden style apartments

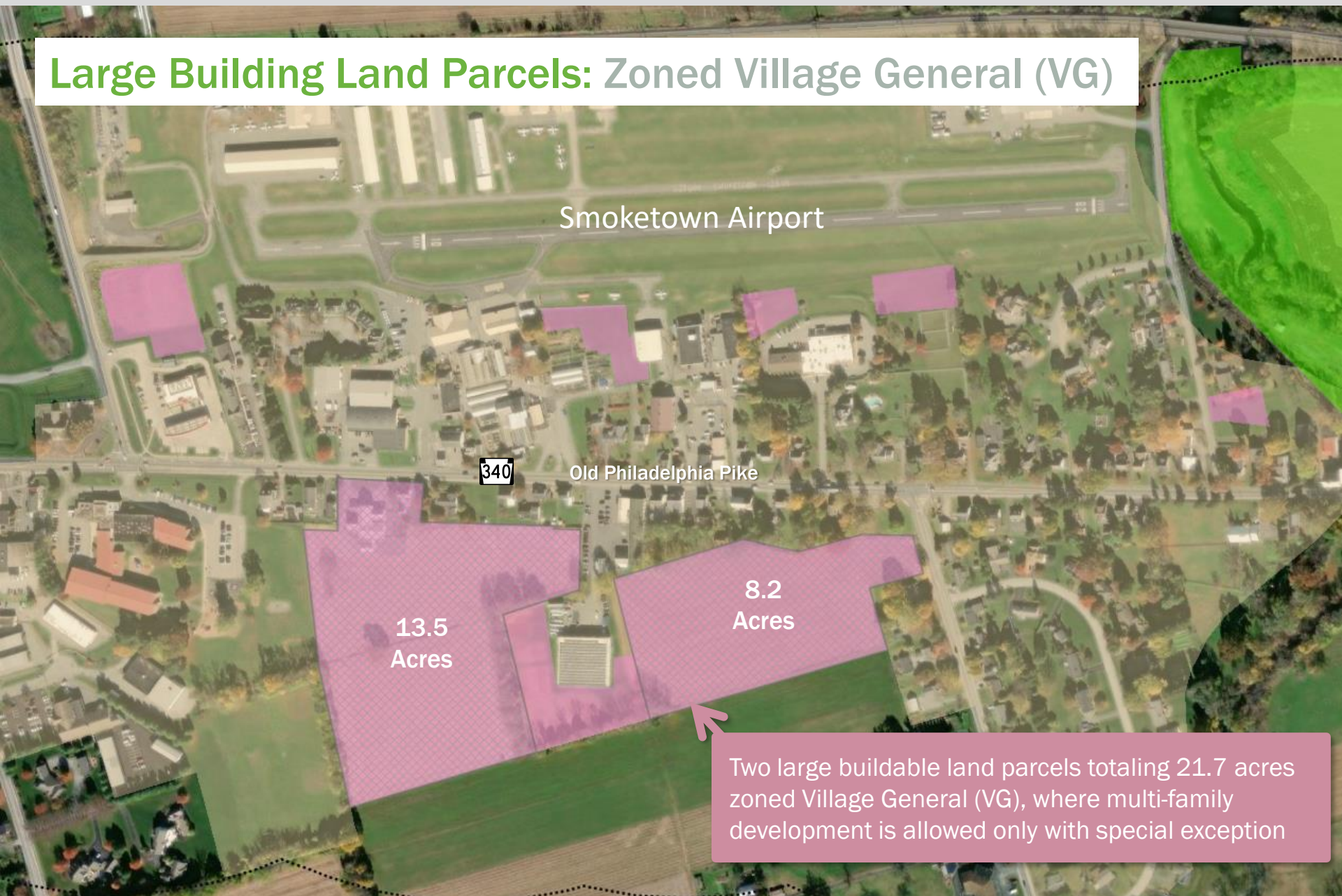
Two adjacent buildable land parcels zoned for High Density Residential (R-3) located between single-family and garden style apartments



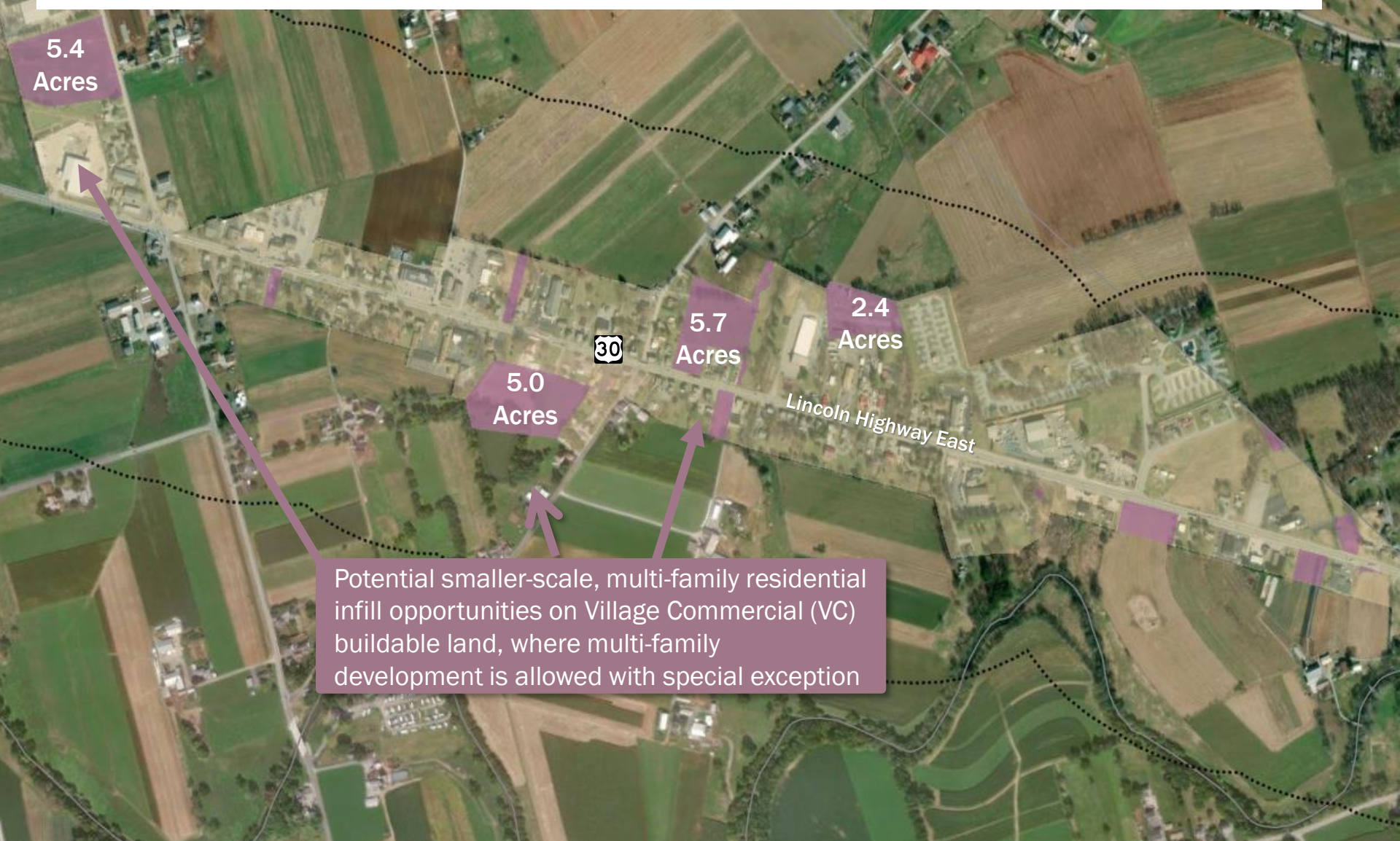
Building Land Parcels: Mixed-Use & Neighborhood Commercial (C-1)



Large Building Land Parcels: Zoned Village General (VG)



Large Building Land Parcels: Zoned Village Commercial (VC)



Large Building Land Parcels: Bird-In-Hand (BH)

0.5
Acre

1.1
Acres

340

Old Philadelphia Pike

2.8
Acres

Potential smaller-scale, multi-family residential infill opportunities on Bird-In-Hand (BH) buildable land, where multi-family development is allowed with special exception

APPENDIX

Glossary of Terms: Socio Economic & Labor

County Continuum of Care (CoC): The local planning body responsible for coordinating the full range of homelessness services in an area.

Displacement: The forced removal or blocked relocation of residents out of or into certain areas that have experienced rent or home price increases and further includes the phenomenon of indirect displacement via social and cultural shifts (Slater 2009).

Empty-Nester Household: A household in which one or more parents live after the children have left home, typically represented by ages 55 through 74.

Family: A family is a group of two or more people (one of whom is the householder) related by birth, marriage, or adoption and residing together; all such people are considered members of one family.

Gentrification: The in-migration of middle- and upper-income households into existing lower income urban neighborhood.

Growth Rates: The chart below outlines how 4ward Planning defines growth rates. For example, flat growth reflects an annualized rate of change between -0.75 and 0.75 percent.

Strong Positive Growth	Greater than	1.50%		annually
Modest Positive Growth	Between	1.50%	and 0.75%	annually
Flat Growth	Between	0.75%	and -0.75%	annually
Modest Negative Growth	Between	-0.75%	and -1.50%	annually
Strong Negative Growth	Less than	-1.50%		annually

Household: A household consists of all the people who occupy a housing unit. A house, apartment, or other group of rooms or a single room, is regarded as a housing unit when occupied or intended for occupancy as a separate living quarter. The count of households excludes group quarters and institutions.

Household Population: Household population, as compared to total population, excludes persons living in dormitories, penal facilities, hospitals, and other institutional settings.

Industry: The industry is the type of activity that occurs at a person’s place of work. Industries are classified through the NAICS.

Non-Family Household: A non-family household consists of a householder living alone (a one-person household) or a householder sharing the home exclusively with people to whom he/she is not related.

Primary Job: A primary job is the dominant job for an individual, defined as the job earning an individual the most money. The number of primary jobs should be equal to the number of workers in a given area.

Urban Revitalization: Often refers to a set of initiatives aimed at reorganizing an existing township structure, particularly in neighborhoods in decline due to economic or social reasons. Urban revitalization initiatives generally include improving features of the urban environment, such as the quality of pavement and the functionality of the sidewalks.

Interviews

4ward Planning conducted email and telephone outreach to relevant regional, county, and local housing organizations, private real estate developers, and residential real estate professionals for their perspectives. The following organizations and individuals responded and subsequently offered their time and insight, supplementing our data analysis and summarized in points of collective, salient feedback.

Housing Organizations

- Community Basics Inc. – Lisa Greener, Executive Director
- Economic Development Company of Lancaster County - Ezra Rothman, Director, Strategic Initiatives & Partnerships; Rae Ann Miller, Analyst, Strategic Initiatives and Partnerships
- Habitat for Humanity – Andrew Szalay, Executive Director
- HDC MidAtlantic – Tammie Fitzpatrick, Chief Operating Officer
- Lancaster County Housing & Redevelopment Authority - Justin Eby, Executive Director; Audrey Steinmetz, Director of Tenant & Landlord Services; Christopher Thomas, Data Compliance Analyst, Homelessness Coalition; Jocelyn Ritchey, Manager of Planning & Resource Development
- Tenfold – Shelby Nauman, Chief Executive Officer

Private Real Estate Developers

- Jeff Fernbach, President, Fernmoor Homes, Jackson Township, NJ
- Brad Mowbray, Senior Vice President – Residential, High Real Estate Group, Lancaster
- Doug Parkins, Director of Land Development & Acquisition, EG Stoltzfus, Lancaster

Residential Real Estate Professionals

- Leah Davis, Sales Associate, Berkshire Hathaway, Lancaster
- Jerry Lehman, Sales Associate, Coldwell Banker, Lancaster
- Faruk Sisic, Broker, Cavalry Realty, LLC, Lancaster
- Keith Shaub, Sales Associate, Berkshire Hathaway, Lancaster
- Mark Thadium, Associate Broker, Berkshire Hathaway, Lancaster
- David Wissler, Team Lead Agent, Colwell Banker, Lancaster



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