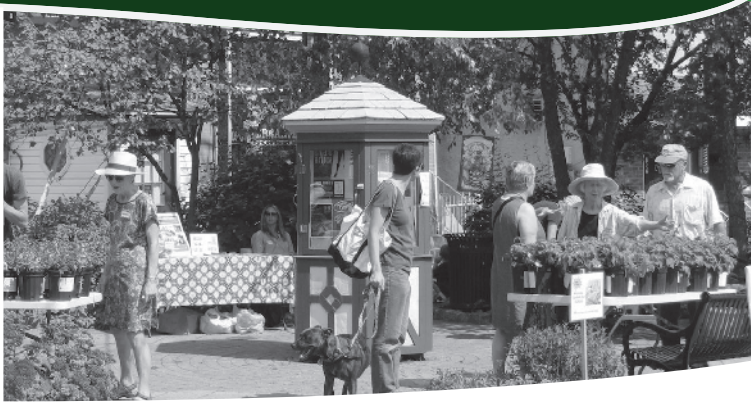
Swarthmore Aging-In-Place Task Force Report

December 7, 2015



With Special Thanks to

Samina Iqbal for the cover design and Swarthmore Task Force map
Carol Menke for the census report, report layout, and graphics
Linton Stables for the PowerPoint presentation, editing, and writing

Cover Credits:

Bottom left: Generations of the Cresson family have lived continuously in Swarthmore since the 1880s. Here the family celebrates William Cresson Jr.'s 10th birthday at 32 Amherst Avenue in 1919. [Courtesy Charles O. Cresson]

Bottom middle: Swarthmore Horticultural Society volunteers maintaining the Memorial Garden.

Bottom right: Marvin and Dorothy Gelb at the 4th of July 2015 parade event. [Swarthmorean Facebook]

Top Left: Swarthmore 4th of July parade 2015. [Marv Gleb photo, Swarthmorean Facebook]

Top middle: 19th Annual Swarthmore Friends of the Arts exhibit opening reception for Swarthmore area artists in Borough Hall May 18, 2015. [Swarthmore Friends of The Arts Facebook]

Top right: Swarthmore Horticultural Society Plant sale at Centennial Park. [Carrie Piccard-SwarthmoreAgent.com]

AGING-IN-PLACE TASK FORCE

SWARTHMORE BOROUGH

TASK FORCE MEMBERS

Tim Kearney, Mayor, Ex-officio

Ann Torregrossa, Chair
Kenneth Carroll, Vice-Chair

Sue Dawes, Member
Kerry Hogg, Member
Samina Iqbal, Member
Carol Menke, Member
Judith Neale, Member
Linton Stables, Member
Betty Ann Wilson, Member

TASK FORCE COMMITTEES

Social Engagement	Health and Safety	Transportation and Mobility	Housing	Planning and Zoning
Kerry Hogg, Chair	Ken Carroll, Chair	Samina Iqbal, Chair	Linton Stables, Chair	Carol Menke, Chair
Linton Stables	Kerry Hogg	Sue Dawes	Sue Dawes	Ken Carroll
Ann Torregrossa	Judith Neale	Carol Menke	Samina Iqbal	Samina Iqbal
	Ann Torregrossa	Judith Neale	Carol Menke	
		Linton Stables	Judith Neale	

Ralph Jacobs, Borough Council President

Elisabeth Knapp, Borough Council Planning and Zoning Committee Chair, Task Force Liaison

Jane Billings, Borough Manager, Task Force Liaison

DECEMBER 7, 2015

TABLE OF CONTENTS

EXECUTIVE SUMMARY

Introduction 1
Key Findings 2
Recommendations 3

GENERAL FINDINGS and RECOMMENDATIONS

Swarthmore Census and Aging-in-Place 12
Key Findings 13
Recommendations 13

SOCIAL ENGAGEMENT RECOMMENDATIONS

Introduction 21
Research 21
Existing Conditions 22
Unmet Needs 24
Recommendations 24

HEALTH AND SAFETY RECOMMENDATIONS

Introduction 27
Research 27
Health and Safety Findings 28
Recommendations 31

TRANSPORTATION AND MOBILITY RECOMMENDATIONS

Introduction 33
Research 33
Existing Transportation and Mobility Conditions 34
Existing Conditions of Services and Destinations 39
Unmet Needs 40
Best Practices 41
Recommendations 42

HOUSING RECOMMENDATIONS

Introduction 48
Existing Housing 48
Housing Key Needs 54
Best Practices 57
Recommendations 58

PLANNING AND ZONING RECOMMENDATIONS

Introduction 61
Research 61
Existing Swarthmore Planning and Zoning 62
Analysis and Key Needs 63
Current Trends and Best Practices 64
Recommendations 68

APPENDICES

Appendix 1 Swarthmore Borough Council Aging-in-Place Task Force Resolution
Appendix 2 Age-Friendly Communities
Appendix 3 Aging-in-Place Census Report
Appendix 4 Public Forum Summaries
4.a Social Engagement Public Forum
4.b Transportation and Mobility Public Forum
4.c Housing Public Forum
4.d Planning and Zoning Public Forum
Appendix 5 Swarthmore Aging-in-Place Task Force Map
Appendix 6 Swarthmore Housing Affordability
Appendix 7 Planning and Zoning Additional Information

EXECUTIVE SUMMARY

INTRODUCTION

The Borough of Swarthmore is one of the most livable communities in the United States. With excellent housing stock and well-maintained infrastructure, an internationally-acclaimed college, an excellent school district, and a location on a major commuter line connecting it with other towns and cities, people are attracted to make this their home. Indeed, the Borough's most important asset is its people and the community they have formed.

Forward-thinking civic leaders have noticed, however, that an important segment of the community finds itself making choices that sometimes result in their leaving Swarthmore. In their words:

> *…certain aspects of housing, transportation and the availability of services impact some of the Borough's older residents and can present barriers to some of the resident's ability to remain in Swarthmore safely, independently, and comfortably as they age…*

On October 14, 2014, the Swarthmore Borough Council established an Aging-in-Place Task Force to study this issue and to make recommendations to the Council on what the community might do to make Swarthmore the community that truly welcomes all ages and abilities—the community in which most Swarthmoreans imagine they want to live as they grow older. (See Appendix 1 Task Force Resolution.)

The Council appointed 9 people to the Task Force, with the Mayor as an ex-officio member and the Chair of the Planning and Zoning Committee of Borough Council and the Borough Manager as liaisons. The group began its work in January 2015. The Task Force established five subcommittees, whose research and reporting addressed the essential aspects of older adults' lives: Social Engagement, Health and Safety, Transportation and Mobility, Housing, and Planning and Zoning.

The very first thing the Task Force members noted was that this was not the first time this issue had been investigated in the Borough. In the 1990s a general survey was conducted in Swarthmore, and the findings were extensive and specific. The work of that group of dedicated citizens resulted in the formation of the Swarthmore Senior Citizens' Association and the creation of the Dew Drop Inn and The Gathering Place. The Aging-in-Place Task force is excited to build upon these respected institutions by providing Borough Council with recommendations that will allow Swarthmore to demonstrate the value it sees in its residents of all ages by its commitment to support those who desire to live in the community for as long as possible.

Task Force Mission Statement

The Task Force adopted a mission statement early in the process:

> The mission of the Aging-in-Place Task Force is to formulate recommendations to Borough Council for measures to improve the quality of life of and reduce barriers faced by residents of Swarthmore who desire to remain in the Borough throughout their lives.

Each subcommittee adopted a mission statement specific to its area of study.

Process

The Task Force met monthly through the first half of the year. Each subcommittee also conducted public meetings, and each one held a public forum to which experts in the field were invited to make presentations and to respond to questions from the public and from Task Force members. In addition, the members of each subcommittee did extensive research outside of the meetings, bringing the results to the larger groups for review. While each meeting of the Task Force and its subcommittees was a public meeting with proper notice given, the Task Force sought out additional public input, particularly in two presentations to the Gathering Place, an intergenerational monthly social and learning event sponsored by the Swarthmore Senior Citizens' Association.

After significant discussion the Task Force decided not to conduct a formal survey. The resources required to do a proper survey were beyond the Task Force's means, and it was unclear that the resulting data would differ significantly from national and regional surveys and information already available. To gather information that would be "Swarthmore specific" the Task Force undertook to interview as many people as who were willing, asking several open-ended questions that evoked their individual stories. The results of the nearly 20-year-old survey were consulted as well, and compared to the information gathered by the interviewers.

The Gathering Place Aging-in-Place Presentation October 28, 2015

KEY FINDINGS

- The needs and values of those who wish to age-in-place often mirror those of all ages and include the love of living in Swarthmore, the desire to walk to various destinations, and the wish to reside in an active intergenerational community.
- There are a lot of resources available to Swarthmoreans to help them successfully age in place, but information about those resources is not centralized or easily accessible.
- There are far too many aging Swarthmoreans who find themselves isolated and lonely, and who could benefit from the recommendations the Task Force is making.
- Many of the needs of those aging in place in Swarthmore could be filled by volunteer efforts of their fellow Swarthmoreans, but there is no entity to connect volunteers to persons with needs.
- There is not enough diverse, accessible, and affordable housing in Swarthmore to house those who want to age in place here.
- Work needs to be done by the Borough, homeowners, Swarthmore businesses, and SEPTA to make Swarthmore accessible and safe for persons with limited mobility.
- Many of the resources needed to successfully age in place are located nearby, but outside of the Borough boundaries and are difficult to connect to unless one can drive.
- With increasing numbers of baby boomers, the unmet needs of those over age 65 will accelerate the current trend of having to leave Swarthmore, rather than remain in the community as the majority wish to do.
- Addressing the recommendations of the Task Force will make Swarthmore a safer and more livable community for residents of all ages.

RECOMMENDATIONS

The Task Force offers the following recommendations. Most recommendations are for action by the Borough Council, but many others are offered to other organizations and individuals who make up the Swarthmore community. There are multiple opportunities for involvement in making our Borough the place we all want it to be.

Recommendations are offered in each of the areas studied by the Task Force. The first eight recommendations, however, are general in nature.

General Recommendations

Recommendation #1. Encourage Borough residents to make concrete plans for their future.

Implementation recommendations:

- Provide resources, including regular programs and seminars, to help residents and prospective residents think about their options for continuing to live in the community.
- Encourage residents to consider the state of their existing homes and how they might need to be modified to accommodate physical infirmities, a smaller family, and perhaps live-in health care aides.
- Revise local requirements to ensure that newly-constructed homes and those that undergo major renovations are made accessible and, to the greatest extent possible, meet the requirements of universal design.

Recommendation #2. Actively involve older adults and engage the aging perspective in the municipal planning and decision-making process.

Implementation Recommendations:

- Commit to soliciting input from older persons and senior organizations.
- Continue to have a Council member, in appropriate committees, designated as a liaison with responsibility for the aging perspective.
- Ensure that older individuals are represented on Swarthmore commissions and that the commissions incorporate the needs and wishes of all ages.
- Seek cooperation from a wide variety of fields and individuals that impact older individuals (i.e healthcare, transportation, housing, architecture, caregivers, social work, public safety) to ensure that all components are considered in the decision-making process.

Recommendation #3. Create a Community Vision Statement that incorporates the values and goals of Swarthmore, which can then inform municipal policies and initiatives.

Implementation Recommendations:

- Work with the Planning Commission to draft a vision statement that speaks to the critical aspects of community life for all ages in such areas as housing, accessibility, walkability, social engagement, and health.
- Adopt a municipal policy statement that reflects Swarthmore's future vision as a community valuing its members of all ages.

- Use the Community Vision statement to implement the values and goals by incorporating them into municipal policies, decisions, documents and multi-municipal initiatives.

Recommendation #4. Use Swarthmore's Vision Statement to establish Swarthmore as an Age-Friendly Community.

Implementation recommendations:

- Become a member of the World Health Organization's (WHO) network of Age-Friendly Communities and/or a member of the AARP Network, and commit to working toward creating an age-friendly community.
- Evaluate measures and priorities to implement, as well as investigating ways to involve older people throughout the Age-Friendly Community cycle.
- Partner with other organizations, especially Swarthmore College, to establish cooperative programs.

Recommendation #5. Explore cooperative measures and organizational means to provide a full range of educational information and support services to older adults.

Implementation recommendations:

- Expand the Borough's website to provide information specific to older adults, including community resources and links to useful websites (such as those that vet and recommend service providers).
- Create a public space for a Document Resource Center, and determine whether other non-digital means of communication are necessary.
- Determine whether there is an unmet demand for digital technology (such as iPads), and related instruction, within Swarthmore's older adult community, especially for those who might be home-bound. If an unmet need/demand for digital technology is discovered, plan to meet that need/demand.
- Provide the *The Swarthmorean* with regular information on programming provided by organizations that cater to older adults and their caregivers, such as the Schoolhouse Center, The Dew Drop Inn, and The Gathering Place, as well as other information relevant specifically to older adults.

Recommendation #6. Establish an Aging-in-Place Implementation Committee to work with Borough Council and existing community organizations to determine how to institutionalize the recommendations of the Aging-in-Place Task force.

Implementation recommendations:

- Limit the Implementation Committee's life to a 1-year term to work with Borough Council on a time-phased implementation plan.
- Determine the best means to institutionalize on-going efforts to support aging in place in the Borough's governmental structure.

Recommendation #7. Provide organizational and fiscal support for a part-time staff person, and accessible local municipal space, to support ongoing implementation of the recommendations and be a resource to those who want to age in place.

Implementation recommendations:

- Provide funding for the part-time position of a Senior Coordinator, employed not by Swarthmore Borough but by a new or existing local nonprofit organization, similar to TCI or SRA.
- Give the Senior Coordinator responsibility for implementing, securing funding for, and maintaining the recommendations of the Task Force and Implementation Committee that are approved by Council.

Recommendation #8. Spearhead the creation of a resource network for older adults, and possibly the larger community, using the TimeBank or Village Movement models.

Implementation recommendations:

- Assign organizational responsibility for resource network start-up.
- Determine whether network will be location-based, and serve Swarthmoreans of all ages, or mission-based, and primarily serve older adults.
- Determine whether the resource network will exist under an umbrella community organization, such as that proposed to serve Swarthmore's older adults, or exist as a separate non-profit organization.
- Determine whether the TimeBank or Village model best fits Swarthmore.
- Establish a resource network.

Social Engagement Recommendations

Findings from the AARP survey regarding "Recreational and Cultural Activities" demonstrate that while Swarthmore has many recreational facilities in the Borough, or close by, those facilities may not be accessible to older adults with impaired mobility, limited income or lack of information. The Swarthmore Senior Citizens' Association supports Swarthmore's older adults by providing social and educational programming at the Dew Drop Inn and The Gathering Place, but there is not an umbrella organization in the Borough that takes the larger role of overseeing the well-being of older residents and ensuring that they have access to all of the services and information available to them. Although recreational, cultural and social service resources may be available to older members of the community, the older adults may not know enough about the resources to take advantage of them, or if they know about them they may not be able to physically get to them.

Recommendation #9: Coordinate existing indoor and outdoor spaces, as well as community resources, to promote intergenerational social interaction.

Implementation recommendations:

- Evaluate existing indoor and outdoor spaces in the area for current and expanded interactive (and accessible) recreational activities, meals, classes and cultural programs that would draw residents of all ages and abilities into town, and enhance the lives of older adults by reducing isolation and loneliness.
- Sponsor a weekly "Swarthmore 101" newcomers' coffee that would give new residents of all ages the opportunity to connect, learn about the community, and learn about resources available to community members of all ages, including older adults.

- Work with existing community recreational resources, such as the Swarthmore Recreation Association and the Swarthmore Swim Club, to ensure that at least a portion of their programming, and all of their facilities, are older-adult friendly and encourage intergenerational interaction.
- Encourage local schools to sponsor ongoing programs or events that would foster interaction between students and older adults in Swarthmore, sharing their skills, knowledge, and time.
- Give special focus to Swarthmore Borough's relationship with the college. Specifically, the Borough should initiate a meeting to discuss the Aging-in-Place Task Force's recommendations with Swarthmore College, including a suggestion that the Lang Center or other College entity sponsor a "reverse" lecture series or other event at which the wealth of knowledge and experience held by Swarthmore's oldest residents might be shared with students and faculty.
- Expand opportunities for older adults to serve as, and be served by, community volunteers. It is recommended that the Borough sponsor a bi-annual volunteer fair in the Borough Hall. This could include local schools, community organizations, and not-for-profit groups that have volunteer needs that could be met by older Swarthmoreans.

Recommendation #10: Encourage synergies among local organizations that already serve, or can serve, older adults in the community, such as the Swarthmore Community Center, Swarthmore College, Wallingford Swarthmore Community Classes, and The Schoolhouse Center.

Implementation recommendations:

- Initiate a consortium of existing local organizations and institutions to coordinate information, services, and programming for older adults.
- Encourage educational organizations, such as Wallingford Swarthmore Community Classes, to expand daytime programming that might be enjoyed by older adults.
- Request that the Schoolhouse Center bring occasional programs into Swarthmore to provide Swarthmore residents with an in-town activity and to market the Schoolhouse Center to the local community.
- Determine whether existing social facilities, such as the Swarthmore Community Center, could be modified to better facilitate regular social interaction and provide accessible space for programming.

Health and Safety Recommendation

Staying safe and healthy becomes increasingly challenging as we age. That is why 25% of people age 65 will spend at least some time in a nursing home. The odds increase with age, of course. (Half of those over 85 are in nursing homes.) Medicare does not pay for long term care, and is not likely to in the foreseeable future.

Recommendation #11. Promote the health and safety of older residents.

Implementation recommendations:

- Identify an appropriate referral source that Swarthmoreans could us to find health care providers willing to visit frail patients in their homes, including consulting with the Borough's Public Health Officer, Dr. John Crawford.
- Implement a volunteer-staffed "friendly caller" program to make daily phone calls to check on frail elders who are living alone.
- Work with the Police Department to:

- Create a database to provide for the safety of elders or disabled persons who are prone to wandering.
- Provide forms and information about a "Vial of Life" program, to facilitate the preparation of health information about frail elders, to attach to their refrigerators and be immediately available to emergency personnel.
- Establish a program to enable elders to provide the police with information about how to gain access to their homes in the event of an emergency.

- Collaborate with other agencies to sponsor social activities and health and safety related programs.
- Develop a web page, phone number, and/or a kiosk in Borough Hall, where elders can obtain information about health and safety-related services.
- Recognizing the adverse health effects of isolation, promote social outlets such as The Gathering Place, The Dew Drop Inn, and the Schoolhouse Senior Center with financial support if necessary.
- Ensure that Swarthmore Emergency Medical Services remain available.
- Sponsor a caregiver support group to meet monthly at the library.
- Create a time bank or volunteer pool to assist unpaid caretakers.
- List all COSA and Schoolhouse events relating to health and wellness in the *Swarthmorean* calendar of weekly events.

Transportation and Mobility Recommendations

The transportation and mobility recommendations are reflective of how important walkability is to Swarthmoreans of all ages, and how access to business, services and social and civic engagement opportunities is critical for a strong intergenerational community.

Recommendation #12. Improve the pedestrian connectivity between destinations by making improvements to existing pedestrian routes and creating new ones.

Implementation recommendations:

- To better connect the north and south sections of Swarthmore at an important transit juncture, work with SEPTA and Swarthmore College to make the Swarthmore Train Station underpass accessible.
- Continue to prioritize and implement sidewalk and curb cut improvements, especially those that may not be constructed in the immediate future such as a Riverview Road sidewalk.
- Cooperate with the College to reinforce connections to and from the College, with consideration given to publicizing an accessible path within the College incorporating key destinations on the campus and in the arboretum.
- Actively pursue connectivity goals with adjacent municipalities that are mutually beneficial such as a new pedestrian connection(s) between Swarthmore, Plush Mills, the Community Arts Center, and the Leiper Trail.
- Add amenities, such as benches, lighting, and shade trees, where needed along key pedestrian routes, especially within the ½ mile walkability radius of the Town Center.

Recommendation #13. Increase accessibility in the Town Center and throughout Swarthmore.

Implementation recommendations:

- Improve accessibility to downtown businesses by providing portable ramp information, requiring that a contact phone number be posted on the outside of the building, and subsidizing the installation of ramps parallel to building front entries that have three or more steps.
- Conduct periodic outreach and education programs for businesses and property owners on compliance with current accessibility laws, including the Building Code and the Americans with Disabilities Act, and provide tax credits to help offset costs of accessibility improvements.
- Create a time-phased plan to complete key accessibility improvements to businesses in an agreed-upon time period¸ with Borough Council working with Swarthmore Town Center to facilitate.
- Promote safety and accessibility throughout Swarthmore by utilizing current design standards such as bump outs, grass buffers, 4 to 5-foot sidewalk widths, and curb cuts with detectable warning strips.
- Consider adding mid-block curb cuts adjacent to some parking spaces to allow mobility-challenged drivers easy access to the sidewalk and parking meters.
- Promote awareness and understanding of accessible design by including safety and accessibility regulatory information and graphics on the Borough's website, with links for other resources.
- Seek grants to make Swarthmore and its businesses more accessible.

Recommendation #14. Improve and promote public transportation and accessibility.

Implementation recommendations:

- Work with established transportation organizations such as SEPTA and Community Transit to increase public transit use through education, pilot use programs, and adding amenities such as covered bus shelters on Chester Road at College and Fairview Avenues.
- Work with SEPTA to make the Swarthmore Train Station underpass accessible.
- Work with SEPTA to explore increasing the length of elevated platform to aid in boarding and disembarking from the train.

Recommendation #15. Improve pedestrian and driver safety.

Implementation recommendations:

- Increase crossing times and road markings at key pedestrian crossings such as Chester Road - College Avenue, and Baltimore Pike – Riverview Road and Swarthmore Avenue.
- Install more visible road markings in advance of and at key crossings.
- Expand the responsibilities of the sidewalk code enforcement officer to include inspecting the walkability of sidewalks, public education outreach, and coordination with construction contractors that may install temporary barriers.
- Continue enforcement efforts and improvement measures to calm traffic on roadways of concern such as Yale Avenue, Swarthmore Avenue and Chester Road.
- Using older-driver federal guidelines, evaluate and implement key safety features such as increasing the size of letters on signs, installing overhead street markings on major roadways, and making roadway markings more visible.

- Evaluate walkways for lighting where safety and visibility is most need, especially near the Town Center.
- Update the Borough's regulatory ordinances to redefine and apply clear sight triangles to road intersections with priority given to major intersections on Swarthmore Avenue, Chester Road, and Yale Avenue, as well as others on well-traveled routes. Similarly, pass a new ordinance to apply clear sight triangles to existing driveways to increase pedestrian safety.

Recommendation #16. Explore systems to provide vehicular transportation to key destinations within and just beyond Swarthmore, to improve the independence and engagement of people who have difficulty driving, walking, or independently accessing public transportation.

Implementation recommendations:

- Organize a volunteer-based driver service as part of a larger volunteer program, such the TimeBank Media system.
- Establish an inter-municipal shuttle linking destinations like the Schoolhouse Center, the Wallingford Arts Center, Springfield Mall, grocery stores, and downtown Media on a regular schedule or as special events.
- Consider subsidizing a multi-municipal 3-1-1 taxi service for qualifying riders.
- Engage with Swarthmore College to coordinate a van service for pick-up from Town Center to locations at the College that are having events, such as the Midday Monday Concerts at Lang Concert Hall.

Housing Recommendations

Housing is—along with healthcare—the major concern that people have as they plan for their future in the Borough. Cost, accessibility, proximity to shopping and medical offices, safety, home maintenance, and proximity to friends and family are all factors in deciding whether to continue living in Swarthmore or to move elsewhere.

Recommendation #17. Encourage the creation of a range of affordable housing options near downtown.

Implementation recommendations:

- Through planning, zoning and tax incentives, facilitate adding low-maintenance, affordable townhomes and apartments within a half-mile of the train station.
- Consider expanding multi-use buildings outside of the Town Center to provide additional housing and parking options.
- Through planning, zoning and tax incentives, encourage the establishment of one or more senior living communities, such as a Naturally-Occurring Retirement Community (NORC), an Intentional Community (cohousing), or a Green House (a group assisted living home).

Recommendation #18. Provide opportunities for diverse housing options throughout Swarthmore.

Implementation recommendations:

- Modify zoning to allow a mother-in-law apartment (Accessory Dwelling Unit) in a single-family home or in a separate building such as a garage.
- Subject to location, change the zoning regulations to allow the conversion of large homes into apartments or condominiums.

- Consider a provision to allow temporary elder housing such as “granny pods”.
- Support a more equitable statewide funding mechanism for schools in Pennsylvania, resulting in lower property taxes for most homeowners.

Recommendation #19. Increase awareness of housing accessibility through education; modify Borough regulations to improve accessibility of homes.

Implementation recommendations:

- Expand the Borough’s website to include details on “Visitability” and how to make a home accessible.
- Actively disseminate accessibility information to realtors, new home buyers, contractors licensed by the Borough, and through the land development and building permit process.
- Allocate a small portion of the building permit fee to promote and implement accessibility and aging-in-place in Swarthmore.
- For homeowners, provide a Visitability Design Tax Credit. For a builder or a developer, consider tax incentives for providing a percentage of accessible and affordable housing, or grant floor area ratio bonuses when visitability elements are incorporated.

Planning and Zoning Recommendations

While the terms may seem unfamiliar, the planning and zoning implementation recommendations have roots in the intergenerational village life of the previous centuries. Innovative planners from the 1900s through today strike responsive chords in Swarthmore when the values of walkability, green spaces, a town center, a wide variety of housing, and connecting neighbors are mentioned. The tools outlined in this report seek to not only preserve the primary values and characteristics Swarthmore, but also endeavor to counteract traditional planning and zoning that has been contrary to those values. As such, implementing the planning and zoning recommendations will benefit all residents and allow them to age within the community.

Recommendation #20. Add new sections to the zoning and subdivision ordinances to permit new housing options in residential districts.

Implementation recommendations:

- Add an Accessory Dwelling Unit (ADU) section that allows a separate apartment in a single-family residential zone, but regulates the details of the implementation and use such as the form and homeowner residency. Streamline the ADU approval process with the least cost possible.
- With conditions, add provisions so that existing large single-family homes can be converted to more than two-dwelling units for condominiums or house sharing.
- Add guidance for the Zoning Hearing Board to encourage aging-in-place accommodations when considering granting variances on the basis of hardship.

Recommendation #21. Modify Swarthmore's ordinances to create more housing and mixed-use opportunities close to the Town Center.

Implementation recommendations:

- Delineate a new overlay zone within about a half-mile of the train station to allow new housing types such as townhomes, large home to condominium conversions, or multi-family dwellings. A new zoning district might also be considered for residential areas just outside of the Town Center.
- Support revisions to the Subdivision and Land Development Ordinance to facilitate mixed-use development close to transit, as well as reconfiguring lots to promote housing options, including cottage cluster housing.

Recommendation #22. Make all planning and zoning documents consistent with the Borough's vision and policies regarding aging-in-place.

Implementation recommendations:

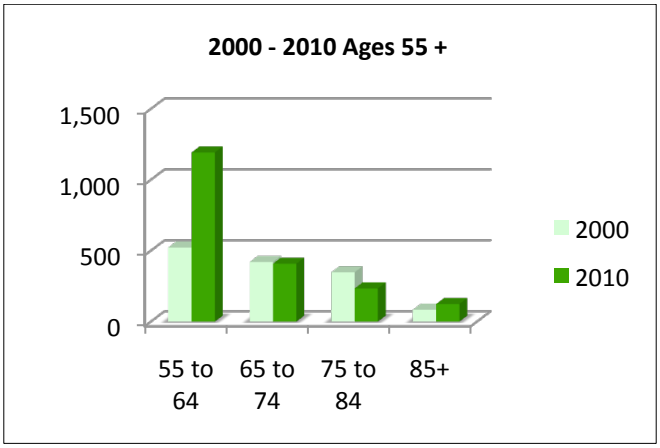
- Revise existing zoning sections such as the Statement of Community Development Objectives and add new definitions to include a wide variety of housing types.
- Extend the Town Center Form-based design guidelines to residential districts.
- Review existing residential district zoning lot sizes, coverage standards, and other regulations to encourage the development of more affordable, accessible, and diverse housing.
- Consider hiring a professional consultant to assist the Borough in updating code sections or suggest other modifications such as redrawing district boundaries, combining or creating new zoning districts.
- Prepare a new Master Plan to ensure that Task Force recommendations and future ordinances are consistent.

GENERAL FINDINGS AND RECOMMENDATIONS

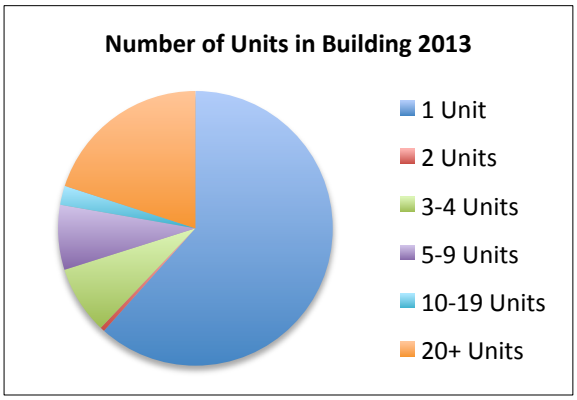
SWARTHMORE CENSUS AND AGING-IN-PLACE

In order to understand older adults in Swarthmore, the first task of the Aging-in-Place Task Force was to look at the census data available in January 2015. Analysis focused on data sources that would reveal not just a snapshot of Swarthmore today, but illuminate trends over the last decade. The Task Force prepared a brief report which included various housing, transportation, disability, and population topics, and can be found in Appendix 3.

Population data confirm that Swarthmore's population is relatively stable, and is projected to remain so in the future. However, the stability in the overall population numbers is because additional Swarthmore College students have offset the slight decline in the non-college population. Not surprisingly, the number of those of age 55 to 64—the Baby Boomers—more than doubled from 2000 to 2010. However, during the same time period, the number of those over age 65 dropped over 10%. It was also noted that there was a slight growth of those over age 85, mirroring national trends.



In Swarthmore households that have someone over the age of 65, there is a growth in the number of older adults who live with families (rather than as a couple), with an unrelated person, or alone. Further, a slightly increasing number of grandparents live with a grandchild.



Swarthmore housing data is of special interest to the Task Force. As a community of almost 75% homeowners, the number of one- or two-person households is decreasing, while households with three or more persons are increasing. For renters of all ages, the number of one-person households has surged, while other size households have declined.

As expected, only a small number of new housing units have been built since 1990. Over 75% of homes were built before 1950. In 2013, 62% were one-family and only 0.5% were two-family; 20% were located in buildings with 20 or more units such as the Strath Haven Condominiums, Swarthmore Apartments, and Greylock Apartments. Almost 50% of housing units were large, having eight or more rooms.

In summary, many of the findings are not surprising, but others clearly show trends indicating that without changes, the population and character of Swarthmore will continue to dramatically change. If we do not act immediately, we conclude Swarthmore's future census data will show that:

- The number of Swarthmore's residents will continue to decline as households grow smaller.
- Not only will Swarthmore continue to lose a proportion of residents over age 65, but the trend will vastly accelerate as the Baby Boomers age.
- There will be little change in the number, size, or diversity of housing units with single-family dwellings predominating, with most apartments or smaller units contained in a few large buildings.

KEY FINDINGS

- The needs and values of those who wish to age-in-place often mirror those of all ages and include the love of living in Swarthmore, the desire to walk to various destinations, and the wish to reside in an active intergenerational community.
- There are a lot of resources available to Swarthmoreans to help them successfully age in place, but information about those resources is not centralized or easily accessible.
- There are far too many aging Swarthmoreans who find themselves isolated and lonely, and who could benefit from the recommendations the Task Force is making.
- Many of the needs of those aging in place in Swarthmore could be filled by volunteer efforts of their fellow Swarthmoreans, but there is no entity to connect volunteers to persons with needs.
- There is not enough diverse, accessible, and affordable housing in Swarthmore to house those who want to age in place here.
- Work needs to be done by the Borough, homeowners, Swarthmore businesses, and SEPTA to make Swarthmore accessible and safe for persons with limited mobility.
- Many of the resources needed to successfully age in place are located nearby, but outside of the Borough boundaries and are difficult to connect to unless one can drive.
- With increasing numbers of baby boomers, the unmet needs of those over age 65 will accelerate the current trend of having to leave Swarthmore, rather than remain in the community as the majority wish to do.
- Addressing the recommendations of the Task Force will make Swarthmore a safer and more livable community for residents of all ages.

RECOMMENDATIONS

The Aging-in-Place Task Force goals and recommendations seek to fundamentally benefit:

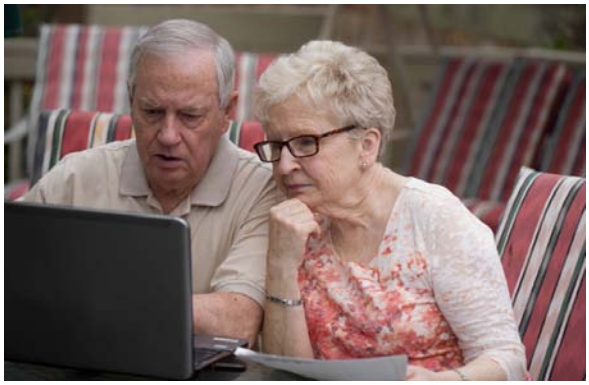
- All Swarthmoreans regardless of age.
- All income levels.
- All family types and sizes.
- All ability levels.

2015 4th of July parade in Swarthmore.
[Marv Gelb photograph]

Recommendation #1. Encourage Borough residents to make concrete plans for their future.

In research and through the interviews of Swarthmore residents, it is apparent that many people do not really know what they are going to do as they grow older. Speaking in very general terms, most people will say that they plan to "take it easy," "do all the things I've been putting off for years," "travel," "spend more time with grandchildren," and a variety of other activities. Others have a dim outlook on the prospect of aging: "I can't *ever* retire," "living on a fixed income will severely limit my lifestyle," or "a long life is not in my genes."

There is much advice for those in the workplace on how to finance retirement years. Surveys, however, indicate that most Americans are not saving enough for their retirement and will be depending on Social Security and family members for financial support. The Task Force did not delve into the realm of individual finances for retirement, *per se*, because the area is already well-documented. It may be safe to assume that Swarthmoreans are much like other Americans, though it might be hoped that more of them have made the financial decisions that will support them well in retirement.



On the other hand, there is very little advice on how to actually *live* in retirement, or for aging in place, perhaps while still working. What is a Living Will, and what is a Medical Power-of-Attorney, and how do you get those documents written? How do you know when it is time to stop driving a car? What will you do when can no longer get to the store to buy groceries? What will it be like to live in your house all alone? How will you keep in touch with your family and neighbors? As noted in the public forum held on housing issues, decision-making that is delayed almost always results in unhappy—and often more expensive—outcomes.

Planning now will help reduce costs and anxieties as changes need to be made. Of course, none of us can predict the future nor can we know exactly what our senior years will look like, but this should not prevent us from discussing it and making what provisions we can. Early discussion among friends and family about possible group living arrangements would give ample opportunity to determine whether those plans would work, and how they might be implemented. Most discussion of retirement centers on finances and healthcare, and less thought is given to the housing and social aspects of senior living. The Borough can assist by making the existing resources easy to find, and encouraging public and private discussion of all the issues.

Meanwhile, the Borough can revise its local requirements to ensure that newly-constructed homes and those that undergo major renovations are made accessible and, to the greatest extent possible, meet the requirements of universal design. This could avoid the costs and headaches of future renovations, and it ensures that these homes will be welcoming to all family and friends, no matter their age or mobility issues.

Implementation recommendations:

- Provide resources, including regular programs and seminars, to help residents and prospective residents think about their options for continuing to live in the community.
- Encourage residents to consider the state of their existing homes and how they might need to be modified to accommodate physical infirmities, a smaller family, and perhaps live-in health care aides.
- Revise local requirements to ensure that newly-constructed homes and those that undergo major renovations are made accessible and, to the greatest extent possible, meet the requirements of universal design.

Recommendation #2. Actively involve older adults and engage the aging perspective in the municipal planning and decision-making process.

Swarthmore's potential to become an age-friendly community will be realized more easily, and naturally, if older adults are involved in the Borough's decision-making processes.

Implementation recommendations:

- Commit to soliciting input from older persons and senior organizations.
- Continue to have a Council member, in appropriate committees, designated as a liaison with responsibility for the aging perspective.
- Ensure that older individuals are represented on Swarthmore commissions and that the commissions incorporate the needs and wishes of all ages.
- Seek cooperation from a wide variety of fields and individuals that impact older individuals (i.e healthcare, transportation, housing, architecture, caregivers, social work, public safety) to ensure that all components are considered in the decision-making process.

Recommendation #3. Create a Community Vision Statement that incorporates the values and goals of Swarthmore, which can then inform municipal policies and initiatives.

Creating a Community Vision Statement is a means of integrating the goals of Swarthmore as an age-friendly community into the Swarthmore community as a whole. In fact, the vision of Swarthmore in the future has many elements that are shared by all ages. As evidenced by the Task Force's research and discussions with Swarthmore residents, some aspects of a livable, sustainability community are especially shared by millennials and those over age 65. These include being able to walk places, not depend on an automobile, being close to transit and services, living in smaller housing units, and connecting to the community. (See also Partners for Livable Communities www.livable.org)

A vision to age-in-place is a vision for the entire community.

One only needs to read some of the postings of 2,000 members on Nextdoor Swarthmore (http://swarthmore.nextdoor.com/), an internet based community bulletin board, to recognize repeating themes. When members complete the sentence "my favorite thing about living in Swarthmore is…", a number of shared values emerge. People write about the town center, active community, trees, the College, great people, architecture, and neighbors. As it reflects the values of the community, a vision statement can be used as a framework to guide Swarthmore's future in many ways. It can assist in establishing policy statements, directing financial resources, creating new initiatives, and translating goals into ordinances. A Vision Statement answers the questions "What are Swarthmore's characteristics and values that we would like to preserve?" and "How can we ensure that these values are not only retained, but also enhanced in the future?"

"What I love about Swarthmore", a children's project at the Farmers Market, August 15, 2015. [Swarthmore Farmers Market Facebook Timeline Photos]

Other than mining Nextdoor and informally talking with residents, there are many ways to obtain the opinions of residents and workers in the community. On one end of the spectrum is creating a draft statement and then soliciting comment from individuals and organizations. The other end could involve a public involvement program consultant that runs the community visioning process with public meetings. Regardless of methods, a variety of tools could be used such as surveys (i.e. Survey Monkey), key stakeholder interviews, meetings at organizations where relative values are ascertained by individuals "voting" for particular value statements.

When a Community Vision Statement is adopted, the next phase is to examine the Borough's current documents, particularly with regard to how aging-in-place goals are integrated with the community's vision. In the future, the Vision Statement can be used in the municipal decision-making process, to explore cooperative initiatives with adjacent communities, and translate the Vision's goals into various documents. An example of Swarthmore's goals being used as the rationale for a municipal document can be found in the 2013 Town Center Zoning Ordinance. The first section details the purpose of the new district, citing Swarthmore's unique identity, preserving historic buildings, encouraging a walkable community, and enhancing a diversity of uses.

Implementation recommendations:

- Work with the Planning Commission to draft a vision statement that speaks to the critical aspects of community life for all ages in such areas as housing, accessibility, walkability, social engagement, and health.
- Adopt a municipal policy statement that reflects Swarthmore's future vision as a community valuing its members of all ages.
- Use the Community Vision statement to implement the values and goals by incorporating them into municipal policies, decisions, documents and multi-municipal initiatives.

Recommendation #4. Use Swarthmore's Vision Statement to establish Swarthmore as an Age-Friendly Community.

An Age-Friendly Community is part of an international movement by the World Health Organization (WHO). An age-friendly community enables people of all ages to actively participate in community activities and plans to better meet the needs of older residents. It helps communities assess how age-friendly they are in eight areas of community life (see Appendix 3). WHO has developed a checklist of key elements enumerated in their *Global Age-friendly Cities: A Guide*.

The AARP Network of Age-Friendly Communities is an affiliate of the WHO program. The AARP Network offers a no-cost membership with many resource guides, examples of other community initiatives, and other benefits. (See www.aarp.org/livable-communities/network for more information.) The membership application process for WHO and AARP use a similar 3-page online fill-in form. Other than an application, membership requires a commitment by a municipality to work toward becoming an age-friendly community.

AGE-FRIENDLY COMMUNITY CASE STUDY

Borough of West Chester, PA

Accepted as a member as WHO Age-Friendly Community in 2014, West Chester created a unique partnership with West Chester University. Special events, intergenerational mentoring, focus groups, community assessment, a blog, and research in eight WHO topic areas are some ways students collaborate with the Borough to advance the goals of an Age-Friendly Community.

Age-Friendly West Chester website, August 2015. http://www.wcupa.edu/_academics/sch_cas.psy/agefriendlywestchester/

Philadelphia and West Chester are members of a Global Network of Age-Friendly Cities and Communities. In Philadelphia, the program was initiated by the Philadelphia Corporation for Aging (PCA). The PCA's website, http://www.pcaagefriendly.org/, has links about activities, resources, progress reports and volunteer opportunities. West Chester is of particular interest to aging-in-place in Swarthmore because of the parallel opportunities to partner with the resident educational institution.

The Lang Center for Civic & Social Responsibility at Swarthmore College might assist the Borough in cooperating with age-friendly research and contribute to implementing aging-in-place goals. Joint programs or events could actively bring students into the community, and conversely, involve older residents on the college campus. The goals are to:

- Recognize that older adults are important and valued members of the Swarthmore community.
- Ensure that that the needs of all residents are met by a multigenerational planning approach.
- Promote access to information, including an effective communication system reaching community residents of all ages.
- Encourage diversity by attracting new residents, as well as retaining those that already live here.

Implementation recommendations:

- Become a member of the World Health Organization's (WHO) network of Age-Friendly Communities and/or a member of the AARP Network, and commit to working toward creating an age-friendly community.
- Evaluate measures and priorities to implement, as well as investigating ways to involve older people throughout the Age-Friendly Community cycle.
- Partner with other organizations, especially Swarthmore College, to establish cooperative programs.

Recommendation #5. Explore cooperative measures and organizational means to provide a full range of educational information and support services to older adults.

While recreational, cultural and social service resources may be available to older members of the Swarthmore community, the older adults may not know enough about the resources to take advantage of them, or if they know about them, they may be unable to physically get to them.

Implementation recommendations:

- Expand the Borough's website to provide information specific to older adults, including community resources and links to useful websites (such as those that vet and recommend service providers).
- Create a public space for a Document Resource Center, and determine whether other non-digital means of communication are necessary.
- Determine whether there is an unmet demand for digital technology (such as iPads), and related instruction, within Swarthmore's older adult community, especially for those who might be home-bound. If an unmet need/demand for digital technology is discovered, plan to meet that need/demand.
- Provide the *The Swarthmorean* with regular information on programming provided by organizations that cater to older adults and their caregivers, such as the Schoolhouse Center, The Dew Drop Inn, and The Gathering Place, as well as other information relevant specifically to older adults.

Recommendation #6. Establish an Aging-in-Place Implementation Committee to work with Borough Council and existing community organizations to determine how to institutionalize the recommendations of the Aging-in-Place Task force.

The Implementation Committee will ensure that the mission of the Aging-in-Place Task Force is carried out on an ongoing basis, through existing or new organizational means, after the initial report has been presented to Borough Council.

Implementation Recommendations:

- Limit the Implementation Committee's life to a 1-year term to work with Borough Council on a time-phased implementation plan.
- Determine the best means to institutionalize on-going efforts to support aging in place in the Borough's governmental structure.

Recommendation #7. Provide organizational and fiscal support for a part-time staff person, and accessible local municipal space, to support ongoing implementation of the recommendations and be a resource to those who want to age in place.

Just as the creation of institutional structures to continue the mission of the Aging-in-Place Task Force requires an Implementation Committee, the fulfillment of the Task Force's mission requires an umbrella organization and a designated staff person to see that the needs of Swarthmore's older adults are met on an ongoing basis. The Borough is committed to its citizens of all ages through the Swarthmore Recreation Association (SRA) and to its businesses through the Town Center Inc. (TCI), and a similar organization seems warranted to meet the needs of the Borough's population as it grows older.

An important task of the Implementation Community will investigate how to structure and fund a Senior Coordinator, perhaps with assistance of the Centennial Foundation.

Implementation recommendations:

- Provide funding for the part-time position of a Senior Coordinator, employed not by Swarthmore Borough but by a new or existing local nonprofit organization, similar to TCI or SRA.
- Give the Senior Coordinator responsibility for implementing, securing funding for, and maintaining the recommendations of the Task Force and Implementation Committee that are approved by Council.

Recommendation #8. Spearhead the creation of a resource network for older adults, and possibly the larger community, using the TimeBank or Village Movement models.

The people of Swarthmore are its greatest asset, and many individuals and organizations have offered their assistance to seniors and others in the community. People want to help their neighbors. The popularity of Nextdoor Swarthmore is a testament to the interest that citizens have in helping each other. Providing a structure for that kind of volunteerism is important in an age where the needs of one neighbor might not be readily apparent to others nearby.

The goal of the TimeBank movement is to build community by demonstrating that all persons have value and something to offer their neighbors. TimeBanking allows individual members to "bank," or earn credit for, time given to other members of the time bank, for which they are eligible to receive equal time from other members in the network. Using the concept of "paying it forward," time may be "banked" for tasks ranging from leaf-raking and babysitting, to financial guidance and math tutoring. In Swarthmore, for example, home maintenance, transportation and other needs of older adults could be provided by younger Swarthmoreans, in exchange for less physically intensive work such as mailing preparation, financial counseling or chess lessons, provided by older Swarthmoreans. Media, Pennsylvania already houses a TimeBank organization, called TimeBank Media, that has

256 current members and had over 3,000 exchanged hours in 2014. TimeBank USA (http://timebanks.org/) is an umbrella organization that offers the underlying software and expert advice on establishing a local time bank.

In the Village movement model, a group of older adults forms a non-profit organization that provides access to services and activities to its members, for an annual fee. Some services, such as snow-shoveling, meal delivery, transportation, or homecare referrals, are supplied to members for a discounted fee by outside providers, some on a voluntary basis by Village members. There are several established Village organizations not far from Swarthmore, including East Falls Village in Philadelphia, and the Brandywine Village Network in New Castle County, Delaware.

Both the TimeBank and Village models provide the means for older adults to obtain support services that may allow them to remain in their homes, and active participants in their community, for a longer time than if such services were not available or affordable. Such models also support the families and caregivers of older adults, by allowing some service needs to be met outside their families. The downside of both models is that they may become less beneficial as older adults' require assistance with basic activities of daily living, although the Village model may help families and caregivers locate community resources to serve their loved ones in their homes. Both types of organization may be operated by volunteers, but usually require some time from a paid administrator.

Implementation recommendations:

- Assign organizational responsibility for resource network start-up.
- Determine whether network will be location-based, and serve Swarthmoreans of all ages, or mission-based, and primarily serve older adults.
- Determine whether the resource network will exist under an umbrella community organization, such as that proposed to serve Swarthmore's older adults, or exist as a separate non-profit organization.
- Determine whether the TimeBank or Village model best fits Swarthmore.
- Establish a resource network.

SOCIAL ENGAGEMENT RECOMMENDATIONS

INTRODUCTION

Findings from the AARP survey regarding "Recreational and Cultural Activities" demonstrate that while Swarthmore has many recreational facilities in the Borough, or close by, those facilities may not be accessible to older adults with impaired mobility, limited income, or lack of information. The Swarthmore Senior Citizens' Association supports Swarthmore's older adults by providing social and educational programming at the Dew Drop Inn and The Gathering Place, but there is not an umbrella organization in the Borough that takes the larger role of overseeing the well-being of older residents and ensuring that they have access to all of the services and information available to them. Although recreational, cultural and social service resources may be available to older members of the community, the older adults may not know enough about the resources to take advantage of them, or if they know about them they may not be able to physically get to them.

RESEARCH

Surveys

The Social Engagement Subcommittee completed the AARP *Livable Communities Survey* at its first meeting. The Subcommittee reviewed completed surveys of older Swarthmoreans who no longer lived here, recently relocated here and who planned to age-in-place in Swarthmore.

Public Forum

The Subcommittee held a public forum on May 4th (see Appendix 4.a for a summary). Panelists included:

- Greg Brown, *Vice President for Finance and Administration, Swarthmore College*
- Peg Christensen, *Board President, Wallingford Swarthmore Community Classes*
- Nancy Davis, Partner, *The Ivy Group*
- Sharon Ford, Retired Director, *Swarthmore Public Library*
- Kim McDaniel, *Director, Schoolhouse Center*
- Amy McKeon, *Director, Swarthmore Community Center*
- VJ Pappas, COO, *Generations On Line*

EXISTING CONDITIONS

Recreational Activities

The small parks that exist in Swarthmore offer walkways, benches, picnic facilities, and other amenities, although it may be difficult for some older adults to get to them due to sidewalks that are not in good repair. While sidewalks for walking and jogging are abundant, damaged sidewalks sometimes limit the routes' safety. There are also a number of areas in town in which sidewalks do not exist on both sides of the street.

Swarthmore College and its Scott Arboretum campus are an invaluable local recreational and cultural resource, with many of its programs available free to Swarthmoreans. The Arboretum offers safe walking, jogging, and biking areas in most weather conditions, because walkways are cleared and treated quickly. However, the campus is difficult for older adults with limited mobility, or lack of transportation, to access. Parking is limited at program venues, as the College discourages car traffic on the campus and it is a long uphill walk from large parking areas near the train station, making it difficult or impossible for older Swarthmoreans.

Swarthmore College has a well-maintained path in the center of the campus, but access is difficult for some. [US News & World Report, Education website]

The paths in the woods behind the college do not offer benches or walkways suitable for frail persons. According to Greg Brown, the College is working on improving lighting and signage on the campus and he agreed to look into the feasibility of having a van do a pick up and drop off from the train station to enable older Swarthmoreans to attend the cultural and intellectual events offered for free at the College. Mr. Brown noted that liability issues could be problematic.

Not all the roads in Swarthmore Borough have shoulders wide enough for safe bicycling, although this is improving.

Springfield Mall is close by and on a bus route, and may provide comfortable indoor walking for exercise. The Healthplex also has an indoor track available for walking, but only for club members.

The only public swimming pool in the Borough is the Swarthmore Swim Club. The pool offers memberships, but they may not be affordable for those on a limited income. The pool is not heated, so water is not always warm enough to be comfortable for older residents. There are membership-only indoor pools at Swarthmore College, the Healthplex at Springfield Hospital, and local YMCAs. Strath Haven High School also allows district residents to use their indoor pool at limited times, for a fee.

There is no public golf course in Swarthmore or Wallingford. The closest public golf course is in Springfield.

There are public tennis courts in and around Swarthmore: near the Swarthmore Rutledge School, on the campus of Swarthmore College and at Strath Haven High School.

Sproul Lanes on Sproul Road in Springfield has bowling leagues and its league interest form offers "senior" as a league-type option.

Cultural Activities

Swarthmore Borough does not have a traditional senior center, but offers some programming at The Dew Drop Inn and The Gathering Place. The Schoolhouse Center in Folsom offers extensive programming and services for older adults and their caregivers and is located within a short car ride from the Borough. (The Center also subsidizes Community Transit rides for seniors traveling to and from the Center.) According to Center Director Kim McDaniel, the Schoolhouse Center has parties and travel excursions. They use volunteers to help deliver meals and provide other services and offer classes in woodcarving, water colors and other arts.

Swarthmore's public library offers community-based programs. Sharon Ford, former Director, noted that the facility is a multigenerational hub and its biggest challenge is making people aware of all that it has to offer. It offers community services such as assistance with Medicare questions, computer literacy and taxes. The library also offers cultural programs such as monthly book and movie groups and foreign language discussion groups. Fifty-seven volunteer retirees help staff the library. The facility is fully accessible, but the challenge is to find street-level parking. The library has recently initiated a volunteer-staffed home delivery service for persons who cannot travel to the library. Four seniors who recently moved to Swarthmore and completed the Task Force survey indicated they had left all their friends to move to Swarthmore when their spouse died and are feeling very isolated and lonely and wish the library would host a "New to Swarthmore Group."

According to Nancy Davis, a library consultant with the Ivy Group, public libraries are becoming "community living rooms." The Swarthmore Library may be challenged in this role because of lack of physical space for new uses. The Swarthmore College library also allows Swarthmore residents to use its libraries for free.

Swarthmore College offers opportunities for volunteer work, with Scott Arboretum and the Chester Children's Chorus. Some attendees of the public forum voiced concern that the cost of Swarthmore College's Lifelong Learning courses are too-high for seniors on a fixed income. According to Greg Brown, the college-sponsored Swarthmore Discussion Group may be more affordable.

Wallingford Swarthmore Community Classes (WSCC) offer opportunities for short-term lifelong learning courses to adults of all ages in the community. According to Peg Christensen, Board President, they offer classes two times a year—Spring and Fall. Classes are offered in the daytime and the evening, at various community venues, including Strath Haven High School, the Borough Hall, Wallingford Presbyterian Church, and Hobbs' coffee shop. The cost of classes is relatively affordable, because the organization's goal is to have the tuition equal the expenses. WSCC is open to suggestions for new class ideas.

The Swarthmore Community Center does not currently offer a large amount of programming for older adults. According to the organization's manager, Amy Brown, the facility does have space and would be open to hosting programs and classes sponsored by other community organizations, for a fee. (Fees for some community groups, such as the Scouts are waived.) Although the Community Center has ample parking and is located within walking distance of the Borough, the second floor space is not accessible to residents with mobility issues, because the building does not have an elevator.

Swarthmore and close-by communities have additional facilities for recreation, cultural events and intellectual stimulation, including the Community Arts Center in Wallingford. If they are physically able, older residents of Swarthmore can access Philadelphia's recreational and cultural resources by taking the train into the city.

UNMET NEEDS

Findings from AARP Livable Communities Survey regarding "The Caring Community" demonstrate that while community social services are available to older residents of Swarthmore, information about the services is not easily available from a single source, such as the Borough website or a community resource paper-based publication.

Swarthmore does not have an information hotline or a directory of services for older persons. Programs offered for older adults are often listed in the *Swarthmorean*, although the newspaper is only published weekly. Some events are beginning to get publicized via the private social network *Nextdoor Swarthmore* and/or the Borough website. Online resources are not available to older adults without access to or interest in information technology, although residents may use computers with free internet access at the Swarthmore Public Library.

The Borough of Swarthmore does not offer a meals-on-wheels program, but the County Office of Services for the Aging (COSA) does. The Swarthmore Co-op also hosts a Sunday Suppers program that provides 3 to 4 meals per month for low-income or home-bound older adults in the area. Seniors may refer themselves to either program, or others may refer them. Community members may learn about opportunities to volunteer for Sunday Suppers through the Co-op's website. Meals on Wheels offers volunteer information at mealsonwheelsamerica.org.

There are limited opportunities for congregate meals for older residents in Swarthmore. The Gathering Place offers a catered lunch each month, and attendees can bring a bag lunch on other program dates. These events are publicized via the *Swarthmorean* and Nextdoor Swarthmore. The Schoolhouse Center has a Dining with Friends Program that sponsors restaurant outings. The Center also provides a hot meal at lunch for those who are age 60 and above, for $2 to $3 per meal.

RECOMMENDATIONS

Social Engagement Recommendation #9: Coordinate existing indoor and outdoor spaces, as well as community resources, to promote intergenerational social interaction.

The Borough should provide additional indoor and outdoor recreational activities, meals, classes, and cultural programs that would draw residents of all ages to convene in town, as well as enhance older adults by reducing isolation and loneliness.

The Borough should look at the model of the Newcomers Clubs, which offer a range of special-interest social activities such as card games, hobbies, eating clubs, and field trips, under one umbrella organization. There are several new and long-standing social and dinner groups in town that involve older adults and have the beginnings of this model.

Swarthmore Farmers Market brings all ages to the Town Center. [Swarthmore Farmers Market Facebook Timeline Photos, November 11, 2015]

Implementation recommendations:

- Evaluate existing indoor and outdoor spaces in the area for current and expanded interactive (and accessible) recreational activities, meals, classes and cultural programs that would draw residents of all ages and abilities into town, and enhance the lives of older adults by reducing isolation and loneliness.

- Sponsor a weekly "Swarthmore 101" newcomers' coffee that would give new residents of all ages the opportunity to connect, learn about the community, and learn about resources available to community members of all ages, including older adults.

- Work with existing community recreational resources, such as the Swarthmore Recreation Association and the Swarthmore Swim Club, to ensure that at least a portion of their programming, and all of their facilities, are older-adult friendly and encourage intergenerational interaction.

- Encourage local schools to sponsor ongoing programs or events that would foster interaction between students and older adults in Swarthmore, sharing their skills, knowledge, and time.

- Give special focus to Swarthmore Borough's relationship with the college. Specifically, the Borough should initiate a meeting to discuss the Aging-in-Place Task Force's recommendations with Swarthmore College, including representatives from the President's office, the Lang Center for Civic and Social Responsibility, Facilities Management, Capital Planning/Project Management, and Strategic Planning. Suggest that the Lang Center or other College entity sponsor a "reverse" lecture series or other event at which the wealth of knowledge and experience held by Swarthmore's oldest residents might be shared with students and faculty.

- Expand opportunities for older adults to serve as, and be served by, community volunteers. It is recommended that the Borough sponsor a bi-annual volunteer fair in the Borough Hall. This could include local schools, community organizations, and not-for-profit groups that have volunteer needs that could be met by older Swarthmoreans.

Social Engagement Recommendation #10: Encourage synergies among local organizations that already serve, or can serve, older adults in the community, such as the Swarthmore Community Center, Swarthmore College, Wallingford Swarthmore Community Classes, and The Schoolhouse Center.

Swarthmore's older adults would benefit significantly if these organizations would develop an annual plan to work together, fill in needed gaps for programs and more effectively publicize the availability of their programs.

Swarthmore Horticultural Society volunteers maintaining the Memorial Garden.

Implementation recommendations:

- Initiate a consortium of existing local organizations and institutions to coordinate information, services, and programming for older adults.

- Encourage educational organizations, such as Wallingford Swarthmore Community Classes, to expand daytime programming that might be enjoyed by older adults.

- Request that the Schoolhouse Center bring occasional programs into Swarthmore to provide Swarthmore residents with an in-town activity and to market the Schoolhouse Center to the local community.

- Determine whether existing social facilities, such as the Swarthmore Community Center, could be modified to better facilitate regular social interaction and provide accessible space for programming.

HEALTH AND SAFETY RECOMMENDATIONS

INTRODUCTION

Staying safe and healthy becomes increasingly challenging as we age; that is why 25% of Americans over age 65 will spend at least some time in a nursing home. The odds increase with age: half of those persons over 85 are in nursing homes. Although Medicaid does cover nursing home care for those who are eligible, Medicare does not pay for long term care, and is not likely to in the foreseeable future. As originally written, the Affordable Care Act included provisions for long term care (Community Living Assistance Services and Supports, or CLASS) but this was deemed too costly and unworkable, and was dropped.

Meanwhile, insurance companies are gradually pulling out of the long term care insurance business. They underestimated the number of people who stopped paying for their policies, and underestimated costs of providing care. In the past five years, ten of the top twenty insurers have stopped selling new long term-care policies, and premiums on existing policies have soared. Nursing home care, even in a semi-private room, costs, on average, $95,000 annually, which will exhaust the life savings of the average Pennsylvania senior in a year.

For many older adults, aging at home is a much more attractive alternative to moving to a long-term care facility, in many respects. But successful aging in place requires community efforts to enhance the health and safety of elders.

The Health and Safety subcommittee used the AARP Livable Communities Health Survey to assess the health needs and resources of Swarthmore's older residents. We gathered information from a variety of sources, conducted a public forum, and solicited public input to our report.

RESEARCH

Reports and Surveys

The Subcommittee obtained information and reviewed a number of resources:

- AARP Livable Survey. http://assets.aarp.org/rgcenter/il/d18311_communities.pdf
- *Symposium on the Economics of Caregiving*, Oct. 30, 2015, Montgomery County Community College.
- National Alliance for Caregiving. www.caregiving.org
- *The Future of Medicaid Long-Term Care Services in Pennsylvania: A Wake-Up Call*, Winter 2013. http://www.iop.pitt.edu/documents/Policy%20briefs/Medicaid%20Long-term%20Care%20in%20Pennsylvania.pdf
- The Pennsylvania Long Term Care Commission *Final Report*, December 2014 .http://www.dhs.state.pa.us/cs/groups/webcontent/documents/report/c_134443.pdf
- United States Census Bureau, *65+ in the US - 2010,* June 2014.

The Subcommittee completed the AARP *Livable Communities Survey* at its first meeting. The Subcommittee reviewed completed surveys of older Swarthmoreans who no longer live here, those who recently relocated here, and those who plan to age-in-place in Swarthmore.

Public Forum

Health and Safety held a Public Forum on May 15, 2015, with the following speakers:

- Sergeant Stufflet, *The Swarthmore Police Department*
- Kim McDaniel, *Director of the Schoolhouse Senior Center*
- Marie Bonita, *Community Outreach Worker for the County Office for Services for the Aging (COSA)*
- Dr. Kenneth Carroll, *Clinical Psychologist and Chair of the AIP Health and Safety Subcommittee*

HEALTH AND SAFETY FINDINGS

Safety Concerns

Elders suffer accidents in the home far more frequently than their younger neighbors. In fact, they account for 70% of all home accidents. Falls at home account for 40% of all nursing home admissions, and 40% of those people never return home.

Older adults are also disproportionally affected by crime. While they are *less* likely to be victims of violent or property crimes, they are *far more* likely to be victims of fraud. In fact, FBI statistics suggest 80% of fraud victims are age 50 and older.

Safety Resources

Police Department

In his presentation to the Health Forum, Sgt. Stufflet emphasized that the Swarthmore Police are available around the clock to serve seniors with health or safety issues. They have often assisted residents lift family members who have fallen, and have even changed light bulbs for elders who could not safely do so themselves.

He advised that phone calls to the Police general telephone number will, more often than not, go to voice mail. Leaving a message there is appropriate when reporting a matter that does not require immediate attention. Otherwise, residents are urged to dial 911, even in situations that may not seem like “real” emergencies. That is the only sure way to have immediate contact with first responders.

Sometimes when responding to a health crisis, the police are unable to enter the home. Sgt. Stufflet urged residents, especially those with special needs, to submit emergency contact information, identifying someone who has a key to the home. Residents should also carry information about medical conditions, medicines, and emergency contacts on their persons while walking in the community, and the same information readily visible in their home.

Sgt. Stufflet cautioned that elders are frequent victims of crime and urged residents to keep cars and houses locked. He noted that older adults are often targets of scams and identity theft and he suggested that residents never provide personal information to a stranger who calls, and not accept services of contractors who appear at the door

unbidden. He recommended that Swarthmoreans pay bills on line, when possible, and use one credit card with a $500.00 credit limit.

Emergency Medical Services

Swarthmore is fortunate to have emergency medical services and ambulance service as part of its fire department. The Swarthmore Fire and Protective Association's ambulance service averages 800 runs a year, with two to four responders on each run. The Association has an agreement with Taylor Hospital to have a Medic Unit stationed at the firehouse. Emergency Medical Services (EMS) is in service 24 hours a day, every day of the year, staffed by volunteers (including Swarthmore College students) and paid staff. A number of Swarthmore older adults stated in their interviews that the presence of the Swarthmore EMS is a source of comfort to them.

Health Needs

People 65 and over comprise 13% of our population, but account for 36% of all health expenditures. Census bureau data indicate that 38% of people over 65 have some type of disabling condition (mostly difficulty walking and/or sensory deficit). Among 85-year-olds, the figure rises to 72%.

Mental health issues also have a major impact on the ability of older adults to live independently. The frequency and severity of cognitive impairment increases with age, and dementia is the leading cause of nursing home placement. Even people who do not have dementia often suffer from more subtle cognitive impairment, particularly the loss of executive function. That is why elders, including those who do not have dementia, are especially susceptible to scams, and less able to assess their own circumstances and abilities accurately.

Coping with health concerns is one of the chief challenges of aging. Swarthmore has no hospital, clinics, nursing homes, continuing care facilities or physicians' offices. Adequate medical resources are available nearby, but none are reachable directly by public transportation (without transfers and walking). Community Transit, however, is available to take residents to medical appointments.

Home health services are readily available. Quality and reliability vary.

Health Resources

Schoolhouse Senior Center

The Schoolhouse Center, one of four senior centers operated by Senior Community Services, offers a plethora of services and supports to help local older adults, including Swarthmoreans, remain healthy and engaged. This includes providing a nutritious lunch for $2, because seniors who live alone do not always feel like cooking for themselves. Fitness activities at the Center include dances, Sit and be Fit classes, seated zumba, mall walking, etc. The Center's programming includes blood pressure screenings, ask the nurse sessions, health fairs, vaccine clinics, and classes on memory loss, fall prevention and weight loss. The Center receives a portion of its support from municipalities throughout Delaware County, according to Ms. McDaniel. At this time, the Borough of Swarthmore does not contribute financially to the Schoolhouse Center and Schoolhouse events are not generally listed in the *Swarthmorean*. Because of this, Swarthmore seniors may not realize that the Schoolhouse programs are available to them.

County Services for the Aging (COSA) Information, Referral, Assessment and Case Management Services

Based on the presentation by Ms. Bonita, one need not be low-income to use one of the eight Delaware County senior centers that receive funding from COSA, including the Schoolhouse Center. Information about all the centers may be obtained by calling the Senior Center to get a calendar of events and the luncheon menus. COSA has an information and referral service located in Eddystone.

Among other things, each year COSA performs 3,600 free home assessments for older adults in the community. Such assessments do not obligate older adults or their families to follow through with the needs identified during the visit. The assessment looks at physical and mental needs of the older adult, and the physical surroundings in the home. The assessor develops a recommended care plan and, depending on a person's income, may secure payment for needed services through the sliding scale Options program. If needed and desired, a care manager is assigned to the older adult to make sure that services are delivered and to alter the care plan should the person's needs change.

Each year, COSA serves 9,700 residents of Delaware County, of whom 1,546 are in the Medical Assistance Aging Waiver program. The Waiver provides free home and community-based services to lower-income residents who have a need for skilled nursing level of care. COSA also receives 6,400 information and referral calls a year. With referrals from COSA, Delaware County's Meals on Wheels Program delivers 99,659 meals a year to home bound residents and is also a way to have someone check in regularly with a senior living alone. Finally, COSA also provides caregiver support in the form of cash, medical supplies, respite care, and nursing home transition services.

Caregiver Support

Unpaid caregivers provide the majority of long-term care to persons aging in place. Such caregivers -- a spouse, adult child, friend or neighbor -- make it possible for the older person to safely age in his or her home. Nearly 44 million Americans are family caregivers, whose unpaid services are valued at $470 billion/year, far more than that paid by Medicare or Medicaid for long-term care. 7 percent of those unpaid caregivers are over the age of 75 and have been providing assistance with activities of daily living to a parent, spouse, sibling or friend for over 5 years. Women do the majority of caregiving and it has a negative affect on their health and finances.

Caregivers who have to leave their jobs or reduce the amount of time they work lose retirement income (wages, Social Security benefits, and pensions) over their lifetime. The estimated aggregate loss wages, pension, and Social Security for adult children caring for aging parents is $3 trillion. Loss of productivity because of caregiver needs by employees costs employers an estimated $33.6 billion. Support groups, respite care and volunteers who can assist the primary caregiver are greatly needed, and are available to local caregivers through COSA and Senior Community Services at the Schoolhouse Center.

County of Delaware Office of Services for the Aging (COSA) has classes for both the caregiver and care receiver. Here a coach leads the Compassion and Self Care group in heart breathing exercises for caregivers. [COSA website, Caregiver Academy 2014 photo]

RECOMMENDATIONS

Older residents of Swarthmore are fortunate to live in an area rich in healthcare, with numerous wellness providers and facilities. They still face dangers such identity and credit card theft or an inability to recognize their need for services. The Borough of Swarthmore can support older adults and their caregivers by serving as an information resource and continuing to provide caring public service through its Police and EMS departments.

Health and Safety Recommendation #11. Promote the health and safety of older residents.

Implementation recommendations:

- Identify an appropriate referral source that Swarthmoreans could us to find health care providers willing to visit frail patients in their homes, including consulting with the Borough's Public Health Officer, Dr. John Crawford.
- Implement a volunteer-staffed "friendly caller" program to make daily phone calls to check on frail elders who are living alone.
- Work with the Police Department to:
  - Create a database to provide for the safety of elders or disabled persons who are prone to wandering.
  - Provide forms and information about a "Vial of Life" program, to facilitate the preparation of health information about frail elders, to attach to their refrigerators and be immediately available to emergency personnel.
  - Establish a program to enable elders to provide the police with information about how to gain access to their homes in the event of an emergency.
- Collaborate with other agencies to sponsor social activities and health and safety related programs.
- Develop a web page, phone number, and/or a kiosk in Borough Hall, where elders can obtain information about health and safety-related services.
- Recognizing the adverse health effects of isolation, promote social outlets such as The Gathering Place, The Dew Drop Inn, and the Schoolhouse Senior Center with financial support if necessary.
- Ensure that Swarthmore Emergency Medical Services remain available.
- Sponsor a caregiver support group to meet monthly at the library.
- Create a time bank or volunteer pool to assist unpaid caretakers.
- List all COSA and Schoolhouse events relating to health and wellness in the *Swarthmorean* calendar of weekly events.

TRANSPORTATION AND MOBILITY RECOMMENDATIONS

INTRODUCTION

The goal of the Transportation and Mobility Subcommittee is to further the ability of people to get to key services and activities, thereby fostering a sense of independence and engagement in the community.

As a small commuter suburb, Swarthmore is fortunate to have many sidewalks throughout the borough, a SEPTA regional rail train station centered in the downtown business district, and a SEPTA bus providing north-south access to critical services. Swarthmoreans also depend on driving as a function of necessity and convenience. The cost of automobile transportation is a challenge for seniors and has an environmental and psychological impact on the overall community. Community Transit of Delaware County fills a key need of door-to-door transportation in a paid ride-sharing program. Many older adults also rely on rides from their neighbors who can help them reach key services.

RESEARCH

Reports and Surveys

Previous reports on existing conditions included:

- 2003 Master Plan (included some transportation recommendations such as improving the Princeton Avenue pedestrian underpass)
- 2006 Multi-Municipal Master Plan (listed pedestrian and biking recommendations for Swarthmore)
- 2010 Bike and Pedestrian Task Force Report
- 2013 Bike and Pedestrian Accessibility Master Plan

The Subcommittee reviewed completed surveys of older Swarthmoreans who no longer live here, those who have recently relocated here, and those who plan to age-in-place in Swarthmore.

Public Forum

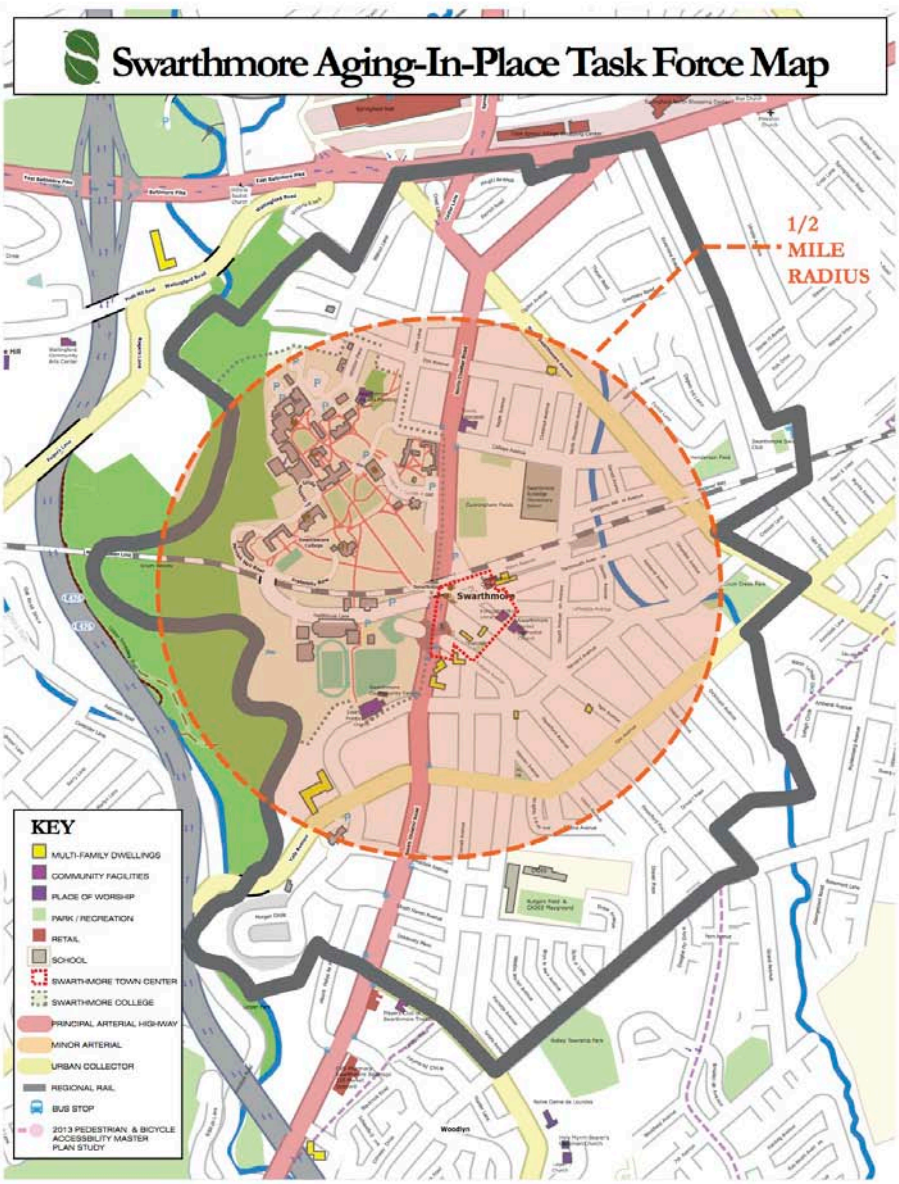
The Subcommittee held a public forum on April 15, 2015 (see Appendix 4.b for a summary). Speakers included:

- Jane Billings, *Swarthmore Borough Manager*
- Wendy E. Petkus-Mažeika, *Director of Business Development, Community Transit of Delaware County*
- Marie Goodwin, *TimeBank Media*
- Marty Spiegel, *Swarthmore Town Center Coordinator*

EXISTING TRANSPORTATION AND MOBILITY CONDITIONS

Walking and Bicycling

Swarthmore is very attractive as a suburb that is as pedestrian-friendly as it is, a rarity among American suburbs. On the www.walkscore.com website, which provides a walk score for any given address, addresses close to Town Center (121 Park Avenue, for example) receive a walk score of 68, which is "Somewhat Walkable." Addresses on the periphery of the Borough (at the north end of Riverview Road, for example) receive a lower walk score of 41, which falls into the category of "Car Dependent." This reflects that near Town Center some activities including grocery shopping and errands can be accomplished within a 5- to 30-minute walk. Swarthmore is approximately two miles long in the north-south direction and 1.5 miles east to west, so walks to destinations in Town Center may exceed one mile. The Transportation Subcommittee feels that the maximum walkable distance for seniors conducting daily living activities is a half-mile.



Swarthmore Aging-In-Place Task Force Map with approximate 1/2 mile walkable radius from the train station's clock. See Appendix 5 for a larger version.

Swarthmore's sidewalks are often obstructed by shrubbery that has not been kept trimmed, or they are uneven or breaking due to tree roots and freeze-thaw cycles. Also, since many roads do not have shoulders, temporary detour signs are placed in the middle of sidewalks, rendering them impassible for people in wheelchairs. With many areas having sidewalks on only one side of the street, navigating throughout the borough can be treacherous.

The roads in Swarthmore have speed limits of 25 to 35 mph. However, speeding motorists continue to endanger the safety of pedestrians and bicyclists. At yield-to-pedestrian intersections, motorists routinely ignore the signage, making pedestrians and bicyclists who are trying to cross the road wait for long periods of time. The Borough is installing Rapid Rectangular Flashing Beacons (RRFB) at some intersections.

At the intersection of Chester Road/Route 320 and Harvard Avenue, a key pedestrian crossing linking Swarthmore downtown to the Swarthmore Community Center, is currently difficult. This intersection is scheduled for improvements with new yield lines, crosswalks, Rapid Rectangular Flashing Beacon (RRFB), and ADA-compliant sidewalks and ramps.

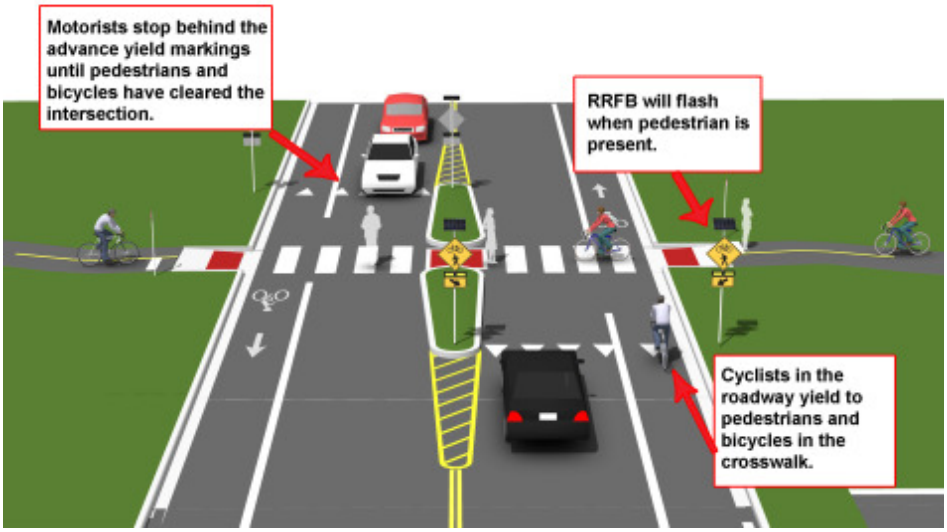


Diagram of how a RRFB functions. [Minnesota Transportation Research Blog [http://mntransportationresearch.org/tag/rrfb/]

The Task Force heard concerns from older Swarthmoreans about the lack of adequate lighting on walking paths, even in areas close to Town Center. Respecting residents' concerns for light pollution, a technical lighting analysis on key pathways should be conducted to determine if lighting levels could be improved, particularly for navigability for residents and visitors with eyesight challenges.

Recognizing that walkability is a key quality-of-life factor that Swarthmoreans value, the Borough formulated the 2010 Bike and Pedestrian Task Force (BPTF) to study bike and walking routes. The BPTF report led to the Borough receiving a grant to create the in-depth 2013 Bike and Pedestrian Accessibility Master Plan. Improved street crossings at Yale and Rutgers, Harvard and Yale, and Chester Road and Harvard were included in this plan are in the

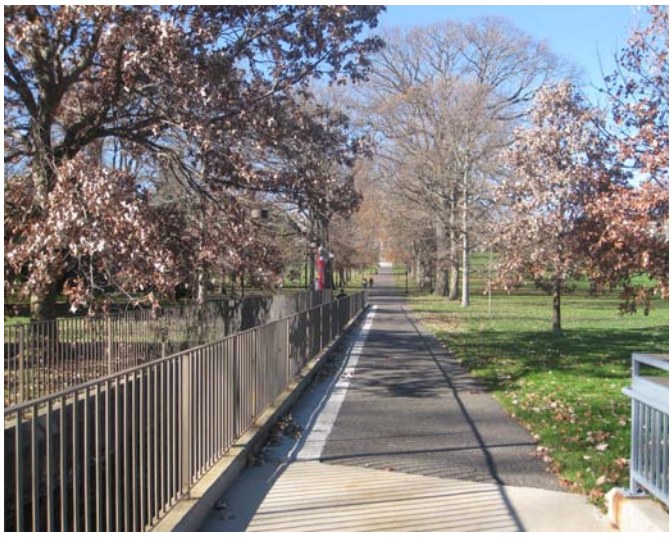
process of being implemented. Several new sidewalks are also being installed. The roundabout constructed in 2015 at Rutgers Avenue and Chester Road reduces the width of the roadway pedestrian crossing.

New roundabout and Inn at Swarthmore College construction at Chester Road/Route 320 and Rutgers Avenue. Pedestrian crossing distances between safe level crossing islands are shorter than the previous crossing's entire road width, and truncated dome detectable warning strips were added for those who are visually impaired.

The Aging-in-Place Task Force is hopeful that once these changes are implemented, some of the concerns about the difficulty walking at these intersections will be much improved. However, the Task Force stresses that walkability is a key need of older adults, and ongoing evaluations and improvements should be made. In fact, in her presentation at the Housing Forum, Beth Murray shared her survey finding that Swarthmoreans in their 50's and 60's named good walkability as their highest consideration in planning to remain in Swarthmore.

Swarthmore College offers walking pathways and many free cultural events that are desirable destinations. However, the Subcommittee heard from many older Swarthmoreans about the difficulty of getting to the College. The underpass at the train station has many stairs on both sides, and the buildings are mostly situated up a long hill. On-campus parking is limited, as the College discourages car use on the campus. At the Social Engagement Forum a request was made for the College to consider providing a van pick-up and drop-off service, but the College official present cautioned that liability could be a limiting factor.

Despite efforts to improve bike signage and navigability in Swarthmore, the primary roads lack shoulders wide enough to promote safe bicycling.



The long hill from Swarthmore Train Station to the College a strenuous walk for mobility-challenged people, making attendance at Swarthmore College's many cultural events difficult for some people.

Roadways and Driving

While some Swarthmoreans walk to a majority of their destinations, most find it necessary to drive to meet their daily and weekly needs. As noted above, the roads in Swarthmore have speed limits of 25 to 35 mph. Speeding is a concern on Chester Road (designated by PennDOT as a Major Arterial Highway) and Swarthmore Avenue (a PennDOT Minor Arterial). Crossing these roads, either while walking or when making left turns onto them where there are no traffic lights, is difficult.

The Subcommittee heard that while many older drivers are comfortable driving in the daytime, many of them avoid night driving. In some areas of the Borough there are streetlamps at regular intervals, but in other areas low lighting and shrubbery make visibility for night driving a challenge for older adults. Most roads are two lanes with no median and do not have reflectors reinforcing lane markings, so glare from on-coming traffic poses a further challenge to older drivers. The Subcommittee heard that some older Swarthmoreans suffer from isolation because of not being able to drive. In some cases, the people citing those situations were the neighbors who had provided rides to older individuals, and who are concerned about meeting ongoing needs.

Parking

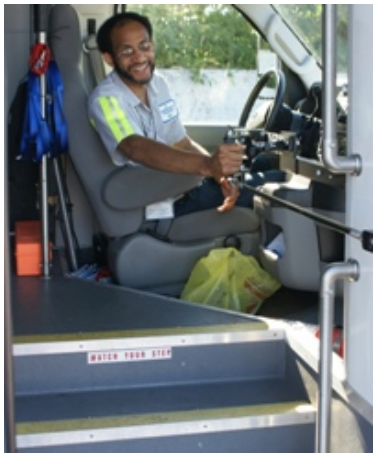
Parking in the Town Center has undergone transition in the past year, and will undergo further change with the forthcoming Centennial Foundation's renovation of the parking lot and recreation area at Borough Hall. Currently, there are two van-accessible spots in front of Borough Hall, and two additional spaces are planned for the renovated parking lot. The parking spots on Park Avenue are angled and are somewhat narrow. In general, the roadways are navigable, but with narrow shoulders and narrow parking spots, driving for older adults may be a challenge.

The Subcommittee also heard concerns about the lack of enough curb cuts adjacent to parking spaces. For those with mobility issues, it was noted how difficult it can be to pay the meters that face the sidewalk, and to do so entailed walking to the end of the block and back, expending limited energy for the day. While it was noted that curb cuts next to every parking space might not be feasible, a few more mid-block curb cuts were desired.

COMMUNITY FEEDBACK
AIP Presentation at the Gathering Place Meeting - October 29, 2015

"Stepping down off of the curb is like stepping into the Grand Canyon."

Community Transit



Delaware County Community Transit. [www.ctdelco.org]

At the Transportation Forum, Wendy E. Petkus-Mažeika discussed the door-to-door transportation services that Community Transit of Delaware County provides to residents of the County. In the period between March 1, 2014 and February 28, 2015, Community Transit provided 132 round trips. Most of these trips were for medical purposes (101 of the total trips), while only 23 trips were for recreation, shopping or visits. Ms. Petkus-Mažeika spoke to the issue that some people feel of a stigma in calling Community Transit.

She urged that everyone register for services despite these feelings, as the service is a valuable resource that can meet critical needs for medical transportation as well as social and recreational needs. Community Transit fees are greatly reduced for senior citizens. The Subcommittee also heard concerns from people stating that wait times for pick-up in the shared-ride model deterred them from using Community Transit more frequently.

Public Transportation

Buses

Southeastern Pennsylvania Transportation Authority (SEPTA) Bus Route 109 has a major stop in Swarthmore at the intersection of Rutgers Avenue and Chester Road, with SEPTA published pick-up times. There are several other stops along Chester Road, including at College Avenue, Harvard Avenue, and Fairview Road. The completed of the roundabout includes re-established bus stops with covered seating areas that are once again accessible, but the shelters do not have lighting.

SEPTA Bus 109 Northbound Stop at Chester Road and Rutgers Avenue. New bus shelters are covered but have minimal lighting.

Regional Rail

SEPTA's R3 Media/Elwyn Regional Rail line is used by many older adults, and the seniors on the Task Force noted that the train conductors are helpful and offer their assistance. The Swarthmore train station has a partially-elevated platform, providing for wheel chair accessibility to the train. However, the Task Force heard concerns that at the portion of the platform which is not elevated, getting on and off the first step of the train is a challenge because it is so high off the ground.

As previously noted, the train station underpass is not accessible, making it difficult for commuters and other pedestrians to cross the tracks at this key juncture, either to access the train or to get to destinations on the other side. This impediment makes the parking lot unusable for in-bound passengers, and does not permit the use of the station as an access point to downtown from the northern part of the borough. The train tracks bisect the borough anyway, but for those who are mobility impaired, they represent a huge barrier.

Swarthmore SEPTA Station, west-bound platform. Underpass with stairs is inaccessible to people with limited mobility.

Existing Conditions of Services and Destinations

Town Center

With regard to accessibility of the Town Center, while the Borough administration/library building is accessible, and the Swarthmore Co-op is also accessible, many businesses in the Town Center are inaccessible due to steps to reach entries, or steps within facilities. Accessibility improvements are not being required, even when there is a change in occupancy. The major reason cited is the cost of the improvements. Existing retail spaces are in older buildings, and most commercial leases require the tenants to pay for improvements. As buildings continue to remain inaccessible, commercial spaces are less attractive to prospective tenants who know that they will be required to make accessibility improvements, with the result that many storefronts remain empty, currently a problem in Swarthmore Town Center.

Retail building improvements are submitted for building code approval to Keystone Municipal Services, and it is unclear when and how the 20% cost of improvements as mandated by the Americans with Disabilities Act (ADA) is assessed. (The ADA law states that improvements for accessibility at a public business must be made if the cost of those improvements do not exceed 20% of the total renovation costs for an upgrade project. In new construction full accessibility is required regardless of cost.)

Many downtown buildings are not accessible; others have an accessible entrance that is neither convenient nor obvious. For example, the accessible entrance for the restaurant on the right is located through a side door via a very narrow alley.

Services and Destinations Beyond Swarthmore

Many key services and destinations lie just beyond the boundaries of Swarthmore. Some of these destinations are reachable by public transit, but others are not. For example, Springfield Mall is on the 109 Bus Route. The distance to the SEPTA 101 Springfield Mall light rail (trolley) stop on Sproul Road from the Springfield Mall 109 bus stop is 0.4 miles. This rail line provides a connection to the 69th Street Transportation Center. However, other destinations, such as the Old Sproul Shopping Center and Giant Food Store at the Springfield North Shopping complex are not at bus stops.

The heavily-trafficked intersections along Baltimore Pike and the very short pedestrian crossing signal times make these destinations difficult to reach. In interviews, some Swarthmoreans noted that the Swarthmore Co-op was too expensive for all of their shopping needs and they need to shop at these nearby stores, but accessing them is difficult. Also, the lack of a pharmacy in Swarthmore or within easy walking distance was noted several times. On-line ordering of pharmaceuticals and other consumer goods may obviate the necessity of having a pharmacy right in town.

Similarly, many cultural and leisure areas are proximate but not readily accessible without a car. Examples include the Wallingford Community Arts Center, and restaurants and entertainment in downtown Media. Even the Player's Club of Swarthmore requires crossing the busy intersection at Fairview Road.

Plush Mill Road looking west toward the Plush Mill Senior Living Community at the Crum Creek bridge crossing. Minimal shoulders make pedestrian and vehicular access to north Wallingford dangerous.

In the future, new technologies such as self-driving cars may have the potential to greatly enhance the independence of home-bound seniors. Also, faster and more ubiquitous delivery of goods and services by various methods may enable more seniors to get what they need when they need it. The subcommittee encourages the ongoing evaluation of the availability and viability of these technologies to help facilitate their uses for those who need them most and who might not be aware of them.

UNMET NEEDS

Shuttle Service

With many walking distances between one and two miles for residents going to destinations within the Borough, and slightly further for many essential destinations just beyond Swarthmore, Swarthmore lacks a means of regularized vehicular transportation that could facilitate mobility to various destinations. Strath Haven Condominiums provides daily van trips to predetermined locations for each day of the week, but that type of service does not exist for the general public. In 2010 and 2011, Nether Providence's Sustainability Committee conducted a feasibility study of a multi-municipal shuttle service. The proposal was not funded at the time, but the Subcommittee feels that such a proposal might merit another evaluation, particularly if it could be a multi-municipal venture.

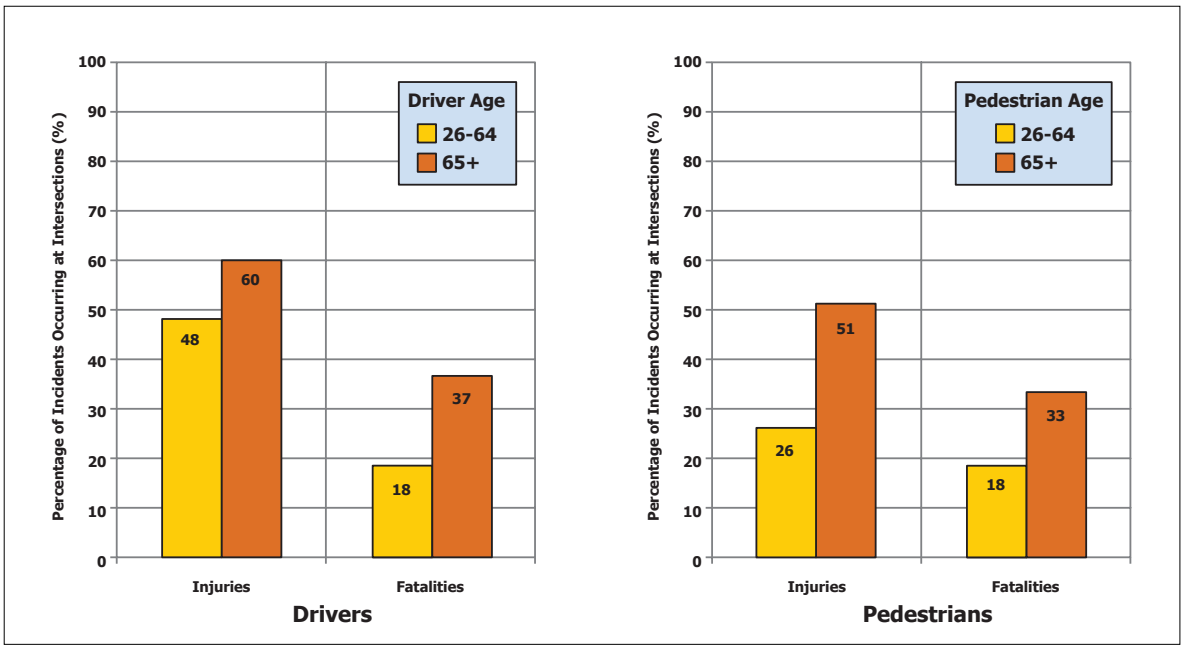
Pedestrian Routes

The lack of an accessible pedestrian route from the south side to the north side of the Borough at the point of the train station poses challenges for Swarthmoreans with limited mobility. An accessible route at the station would both facilitate commuters' crossings as well as provide better access for Swarthmoreans to walk to the activities on Swarthmore College's campus and to other parts of town.

With declining vision, roadway signs and pavement markings become less legible, and curbs, barriers, pedestrians, and other drivers are more difficult for older drivers to see. Decreased physical fitness and flexibility make it difficult for older drivers to rapidly scan to the left and right at intersections and look over their shoulders to back up. They also walk more slowly across intersections. Decreased ability to focus attention; increased reaction time. Older drivers and pedestrians are involved in a higher percentage of injury and fatal incidents at intersections.

Additional items that become more difficult with age include:

- Reading street signs
- Driving across an intersection
- Making a left turn at an intersection
- Following pavement markings
- Responding to traffic signals



The chart above of the percentage of crashes involving drivers and pedestrians by age at intersections shows that injuries and fatalities increase for those over the age of 65. [*FHWA Handbook for Designing Roadways for the Aging Population, p. 14.*]

Parking is a problem in and near Town Center. Some near-downtown residents must use street parking because properties lack a garage or driveway, but often find there are no spaces near their homes due to commuters or others coming to town.

BEST PRACTICES

Recent case studies and best practices in transit policy and town planning offer key lessons for Swarthmore as it develops inclusive transportation and mobility plans for the future.

- **Complete Streets**: Enable safe, comfortable, and convenient travel by automobile, foot, bicycle, and transit, regardless of age and ability.

- **Context Sensitive Solutions (CSS)**: Allow a more flexible approach to road design so that a wider range of community values and user needs might be addressed. AASHTO (American Association of State Highway and Transportation Officials) defines CSS as "a collaborative, interdisciplinary approach that involves all stakeholders to develop a transportation facility that fits its physical setting and preserves scenic, aesthetic, historic, and environmental resources, while maintaining safety and mobility."

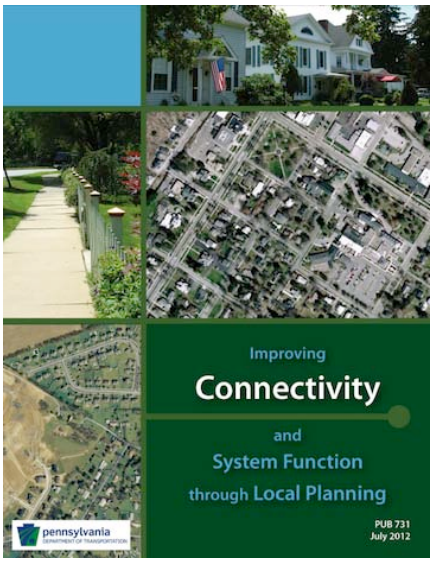
- **Age-friendly community initiatives**: Transportation projects including increased public transit and free or reduced-cost taxis and other rides, promoting walkability and accessibility.

- **Multimodal Connectivity**: Promotes connections between alternative modes of transportation such as walking, biking, and public transit.

- **Smart Transportation**: PennDOT's programmatic policy version of CSS ensures that improvements reflect the unique characteristics of a community.

- **Transit Oriented-Development (TOD)**: Encourage higher-density development around major transportation nodes, taking advantage of space that is freed up by not having as many automobiles on the streets or in parking facilities.

- **Walkable Communities**: Design around the needs and desires of people to connect with one another.



The Connectivity Handbook outlines strategies and tools for municipalites including a model connectivity ordinance. [PennDOT Publication 731, July 2012]

RECOMMENDATIONS

CASE STUDY: TRANSIT FIRST POLICY
San Francisco, CA

"Decisions regarding the use of limited public street and sidewalk space shall encourage the use of public rights of way by pedestrians, bicyclists, and public transit, and shall strive to reduce traffic and improve public health and safety."

Planning Complete Streets for an Aging America, Appendix A: Complete Streets Policy Inventory and

Adopt a policy with the focus on multimodal connectivity to promote walking, biking, and use of public transit stating guiding principles and practices so that transportation and mobility improvements are planned, designed, engineered, and constructed considering all modes of transportation.

Multimodal connectivity allows all ages to walk to transit and cultural activities, promotes social engagement and healthy lifestyle through walking and biking, and encourages environmental sustainability by moving away from automobile to alternative modes of transportation.

Transportation and Mobility Recommendation #12. Improve the pedestrian connectivity between destinations by making improvements to existing pedestrian routes and creating new ones.

Improvements that increase connections within the distinct areas of Swarthmore as well as to adjacent municipalities should be studied and considered. These improvements help everyone access the rich resources within the borough as well as just outside the borough, helping to increase engagement and reduce isolation; they improve safety of pathways that are already used, but that may pose some dangers for older Swarthmoreans and other community members, and; they make Swarthmore an attractive place to live for people who want to enjoy the outdoors by walking to places.

Implementation recommendations:

- To better connect the north and south sections of Swarthmore at an important transit juncture, work with SEPTA and Swarthmore College to make the Swarthmore Train Station underpass accessible.
- Continue to prioritize and implement sidewalk and curb cut improvements. These locations would include:
  - Crossing at Henderson Avenue and North Swarthmore Avenue
  - Walking path demarcation at Henderson Avenue
  - Sidewalk at Riverview Road
  - Sidewalk at Fairview Road and Michigan Avenue
- Cooperate with the College to reinforce connections to and from the College, with consideration given to publicizing an accessible path within the College incorporating key destinations on the campus and in the arboretum.
- Actively pursue connectivity goals with adjacent municipalities, such as new pedestrian connections between Swarthmore, Plush Mills, the Community Arts Center, and the Leiper Trail. Possible routes include developing Crumwald Avenue, on a parcel owned by Swarthmore College. Another possible route is the continuation of Victoria Road. This path would connect through a parcel owned by the Barrow Real Estate Partnership, but would also require an easement through another private house parcel. Any route would need to consider the steep slopes.
- Provide amenities such as benches, lighting, and shade trees along key pedestrian routes, especially within the half mile walkability radius of the train station. Consider adding benches along pedestrian-heavy pathways such as Park Avenue, Dartmouth Avenue, Chester Road, Yale Avenue, and Swarthmore Avenue to provide rest areas along longer walking routes. Consider adding shade trees in conjunction with benches. Install more bike racks in town center to encourage automobile-free transit.

Transportation and Mobility Recommendation #13. Increase accessibility in the Town Center and throughout Swarthmore.

Increasing accessibility makes Town Center an equitable and friendly place for Swarthmoreans of all abilities, increases the number of patrons who can access businesses, thereby increasing profitability; makes it easier for families with young children in strollers to patronize businesses; makes deliveries easier, and; decreases the likelihood of someone accidentally falling and slipping in bad weather, reducing costly insurance claims.

Example of ramp installed parallel to building at PNC Bank on South Chester Road in Swarthmore. Ramp provides accessible entrance while not encroaching on sidewalk.

Implementation recommendations:

- Improve accessibility to downtown businesses by providing information on portable ramps to business owners, requiring that a contact phone number be posted on the outside of each public building to reach a person inside to assist with accessibility, and subsidizing the installation of permanent ramps parallel to building front entries that have three or more steps.
- Conduct periodic outreach and education programs for businesses and property owners on compliance with current accessibility laws, including the Building Code and the Americans with Disabilities Act, and provide tax credits to help offset costs of accessibility improvements.
- Create a time-phased plan to complete key accessibility improvements to businesses in an agreed-upon time period¸ with Borough Council working with Swarthmore Town Center to facilitate.
- Promote safety and accessibility throughout Swarthmore by utilizing the same design standards as the current round of sidewalk improvements with:
  - Bump outs and grass buffers
  - 5-foot wide pathways to allow for two wheelchairs passing, or require a minimum 4-foot width for new and replaced sidewalks where a 5-foot width is not feasible.
  - Truncated dome detectable warning strips and ADA ramp curb cuts where missing at crosswalks

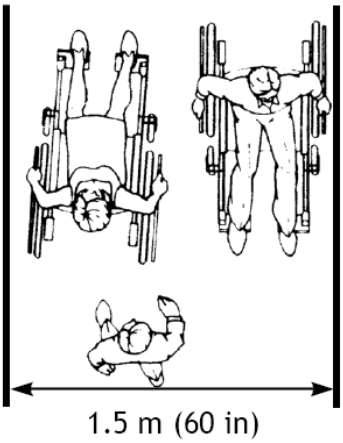


Diagram of two wheelchairs passing on 5-foot wide path. [www.fhwa.dot.gov/publications/research/safety/pedbike/05085/chapt8.cfm]

- Consider adding mid-block curb cuts adjacent to some parking spaces to allow mobility-challenged drivers easy access to the sidewalk and parking meters.
- Promote awareness and understanding of accessible design by including safety and accessibility regulatory information and graphics on the Borough's website, with links for other resources.
- Seek grants to make Swarthmore and its businesses more accessible.

A vegetated stormwater bump-out can help calm traffic while managing stormwater run-off. [www.phillywatersheds.org/what_were_doing/green_infrastructure/tools]

Transportation and Mobility Recommendation #14. Improve and promote public transportation and accessibility.

Improvements to public transportation help Swarthmoreans who do not drive to engage in the community and access services and destinations beyond Swarthmore. They also decrease dependency on individual car rides, even for people who do own a car and who can drive, while making Swarthmore an attractive community for more people, especially for those who are considering living here as they age.

Implementation recommendations:

- Work with established transportation organizations such as SEPTA and Community Transit to increase public transit use through education and pilot use programs. A local group could sponsor a trip into Philadelphia or elsewhere using a public transit service to gain familiarity with the system and encourage increased ridership.
- Work with SEPTA to make the Swarthmore Train Station underpass accessible. The current stairs prevent easy access for commuters as well as for people trying to access Swarthmore College from town center. Consider providing additional parking at the north side SEPTA parking lot for off-site parking, and consider adding multi-family housing above the additional parking.
- Work with SEPTA to explore increasing the length of elevated platform to aid in boarding and disembarking from the train.
- Provide improvements as coordinated through DVRPC/Delaware County Planning Authority and following SEPTA's Bus Stop Design Guidelines. Specific amenities include:
  - Covered bus shelters at the SEPTA Bus 109 stops on Chester Road at College Avenue and Fairview Road.
  - Improved lighting at the existing SEPTA bus stops.

Perhaps designed by Swarthmore College using stone materials, a bus shelter at Chester Road and College Avenue would promote ridership and enhance rider comfort. Connectivity would also be improved after the proposed 5-foot sidewalk along College Avenue to the Swarthmore-Rutledge School is constructed.

Transportation and Mobility Recommendation #15. Improve pedestrian and driver safety.

Improve Swarthmore's roadways to enhance vehicular safety and wayfinding for all ages. Make it easier for older drivers to notice, read, understand, and respond to visual cues and information. As outlined in current engineering standards and guidelines, evaluate elements that balance the needs of drivers and pedestrians of all ages in Swarthmore including access management, right turn on red, and curb radius.

Making streets, sidewalks, and homes safe and accessible is very important for all residents. Preventing falls is critical as they account for 68% of hospitalizations for age 65+ population. Updating the Swarthmore code should include an integrated approach that includes the maintenance of sidewalks, lights for safe environments, and walkable neighborhoods. In that regard, existing borough regulations should be reviewed in view of current design standards for walkability, wayfinding, and accessibility.

Implementation recommendations:

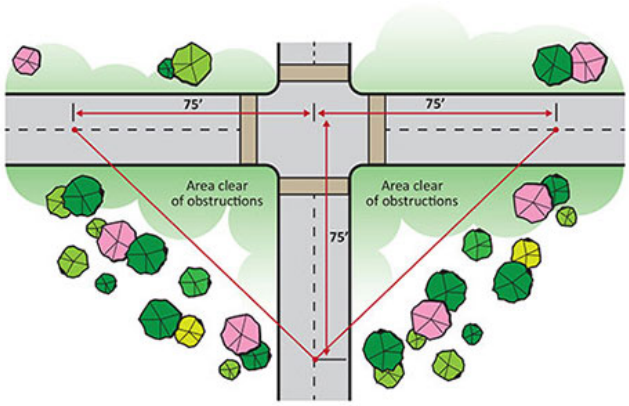
- Endeavor to reduce vehicular speeds in areas where pedestrians interact and where older drivers and pedestrians need more time to make decisions and execute changes. Increase crossing times by adding intersection crossings pedestrian countdowns at critical pedestrian crossings such as Chester Road - College Avenue, and Baltimore Pike – Riverview Road and Swarthmore Avenue. Increase traffic light times. Use walking speed of 3.0 feet/second to calculate total crossing time, measuring the crossing distance from a location 6 feet back from the curb or travel lane edge.
- Install more visible road markings, perhaps using high-visibility ("Ladder") Crosswalks at key crossings. Evaluate the need to use highly reflective marking material to supplement other advance warnings at:
  - Rail crossings
  - The roundabout
  - S. Swarthmore at Widener Way pedestrian crossing
  - College Avenue crossing at Chester Road, and
  - South Chester Road crossing.
- Expand the responsibilities of the sidewalk code enforcement officer walkability of sidewalks, providing public education, and coordinating with construction contractors and utility providers to ensure that the placement of temporary signage and detour signs does not impede the sidewalks.
- Continue enforcement efforts and improvement measures to calm traffic on roadways of concern such as Yale Avenue, Swarthmore Avenue and Chester Road.
- Using older-driver federal guidelines, evaluate and implement safety features such as increasing the size of letters on signs, installing overhead street markings on major roadways, and making roadway markings more visible. Follow Federal Highway Administration (FHWA) guidelines for minimum letter heights of 6 inches for uppercase letters and 4.5 inches for lower case letters for street identification signs and wayfinding. Use overhead mounted street names at major intersections (minimum letter height of 12 inches for uppercase letters and 9 inches) with contrasting colors.

Signs that are highly visible with high contrast colors and standardized letter sizes can assist older drivers and all visitors find their way to various destinations in Swarthmore. [AARP Livable Communities and the Walkable and Livable Communities Institute, *The Imagining Livability Design Collection*: A visual portfolio of tools and transformations, 2015]

- Evaluate walkways for lighting and consider adding lighting where safety and visibility is most needed, specifically near town-center. If other sidewalk improvements are being made and lighting is not scheduled to be installed at that time, install electrical stub-outs for future light posts.
- Update the Borough's regulatory ordinances to redefine and apply clear sight triangles to road intersections with priority given to major intersections on Swarthmore Avenue, Chester Road, and Yale Avenue, and other well-traveled routes. As clear sight distances can vary, but more directly relate to safety, it may be important to also translate these parameters to selected intersections.

  Similarly, a new ordinance should be passed to expand the use of §1024.06 Driveways Crossing Sidewalks/Curb Cuts so that it applies to new and existing private driveways. This will establish clear sight triangles at all driveway exits and help ensure the safety of pedestrians, particularly public and/or high use private driveway egresses, such as the exit from the Public Works Recycling Center.

  It is also suggested that clear sight information be developed with clear graphics for posting on the Borough's website and for better resident understanding and dissemination. Graphics could include prototypical plant species that can illustrate the growth of plants at installation and maturity so that plant species are chosen and located properly.



Most area municipalities only allow low vegetation within a 75-foot clear sight triangle. [Chester County Planning Commission, *Landscapes2*, Multi-Modal Handbook, Design Elements, Intersections]

Transportation and Mobility Recommendation #16. Explore systems to provide vehicular transportation to key destinations within and just beyond Swarthmore, to improve the independence and engagement of people who have difficulty driving, walking, or independently accessing public transportation.

Alternative modes of door-through-door transportation assist people who are currently isolated because they are not able to drive or walk to public transportation such as bus stops and train stations.

Implementation recommendations:

- Organize a volunteer-based driver service as part of a larger volunteer program, such the TimeBank Media system.
- Establish an inter-municipal shuttle linking destinations like the Schoolhouse Center, the Wallingford Arts Center, Springfield Mall, grocery stores, and downtown Media on a regular schedule or as special events. The Strath Haven condominiums weekly schedule of predetermined destinations could serve as a model.
- Consider subsidizing a multi-municipal 3-1-1 taxi service for qualifying riders.
- Engage with Swarthmore College to coordinate a van service for pick-up from Town Center to locations at the College that are having events, such as the Midday Monday Concerts at Lang Concert Hall.

HOUSING RECOMMENDATIONS

INTRODUCTION

Housing—along with health care—is one of the top issues people face as they make decisions with regard to living in Swarthmore or elsewhere. Cost, accessibility, and proximity to shopping and other activities are the determining factors in deciding to continue living in the family home, or to move to another home in the Borough, or to move to another location entirely.

The Housing Subcommittee seeks to understand and further the ability of people to live in the community in appropriate housing, fostering each person's sense of independence and security. "Community" is broadly defined to include housing options that are just outside the Borough boundaries, but which house a number of people who still consider themselves part of Swarthmore.

Public Forum

The Subcommittee held a public forum on May 20, 2015 (see Appendix 4.c). Speakers included:

- Lynda Lemisch, MS, OTR/L, CLCP, CAPS, an occupational therapist who evaluates existing living situations and makes recommendations for modifications that will make the home or workplace more amenable to a senior person or someone with disabilities.
- Bob Fatscher, *R.L. Fatscher, Inc.,* is a residential general contractor who does interior and exterior renovations.
- Christy Bobo, BSW, *Director of Housing, County of Delaware Service for the Aging (COSA),* is responsible for the housing programs at the county-wide agency for providing services to seniors and to those with disabilities.
- Beth Murray is a graduate student at the University of Pennsylvania, pursuing a Master of Environmental Studies and taking classes in City Planning at the Penn School of Design. She has completed research and a paper on the type of housing the next generation of Swarthmore seniors will be looking for.

EXISTING HOUSING

Using the AARP *Livable Communities Survey* on Housing the Subcommittee assessed existing housing options in Swarthmore. While the Borough has a variety of housing types, none of them is affordable, and none are specifically geared to senior living. One complex of low-rise homes (Morganwood) was purpose-built as a retirement community, but it no longer functions in that capacity.

Housing Types Within the Borough of Swarthmore

Private Housing

Independent living or in some cases, assisted living, in your own home. The home may be purchased or rented. In the latter case there may be subsidies available. Private housing includes homes already owned by seniors, but also includes moving to a smaller home or to one of the options noted just below. Certain financial products, such as reverse mortgages, are specifically geared to assist seniors in continuing to live in their own homes.

Swarthmore has a typical mix of housing, with 58% (1,235) of the total 2,135 housing units consisting of single-family detached houses, and 15% (316) of the units in multi-family housing of 50 units or more. Buildings of 50 units or more include the Strath Haven Condos, Dartmouth House, and Greylock Apartments.

Housing value is high in Swarthmore, with 27% of homes valued between $500,000 and $749,999.

Another form of private housing is an accessory dwelling unit, which is an apartment built on the same property as a single family home. These are not permitted in Swarthmore, though several exist. Allowing has been reviewed by the Swarthmore Planning Commission three times in the past, without coming to a vote. Concerns include how increased density and apartment units would affect the aesthetics and feel of the neighborhood. Also, this being a college town, there is a concern about houses filled with college students located in the middle of neighborhoods.

Quite a few residences have apartments (ADUs) that are grandfathered in: there are 20 houses that have 2 units; 17 have 3 units; and 14 have 4 to 10 units. Many ADUs are inconspicuous from the street.

At the Housing Forum, Christy Bobo described the other kinds of senior living arrangements that are available.

Naturally-Occurring Retirement Communities

A form of private housing, with independent living in your own home purchased in a building or group of buildings that has, over time, attracted a majority of residents who are older. These communities may organize themselves to secure services such as on-site meal deliveries and medical services. Such a community might also have amenities such as swimming pools and tennis courts supported by a monthly fee. This type of housing may be available in Swarthmore, but none have been officially designated as such.

Although not designated as a NORC, many older residents of Swarthmore live in the Strath Haven Condominiums. There are 239 units, 20 of which are commercial spaces.

Home Sharing

Independent small group living or in some cases, assisted living, in your own home or in another person's home. The home may be purchased or rented. The other person or people may be friends, relatives, or someone with whom you have been matched by a service.

Housing Types Near (but not in) Swarthmore

Congregate Housing

Mostly independent living, in separate apartments with kitchens. There may be some organized activities and perhaps transportation provided, but there are no congregate meals or medical services. Privately run congregate housing may charge a monthly fee, but does not normally have an entrance fee. Some privately run congregate housing has subsidized units available. Most are built to be fully accessible.

Housing Authorities

A form of congregate housing with independent living, built and operated by a public agency for those who qualify based on financial need. There may be some organized activities and perhaps transportation provided, but there are no congregate meals or medical services. Publicly-subsidized housing usually has a waiting list, and it's important to get on the list as early as possible.

Continuing Care Retirement Communities (CCRC)

A community that includes housing for independent living, assisted living, and skilled nursing. There are organized activities and usually transportation provided. Though most independent living units include full kitchens, a certain number of meals are provided and some on-site medical services are provided. There is usually an entrance fee and there is a monthly fee as well. The cost of CCRC's can be high relative to other congregate housing options.

Plush Mills Senior Living Community in Wallingford is a CCRC. [www.plushmills.com]

55+ Communities

A form of private housing, with independent living in your own home purchased in a community that stipulates that residents be of a certain age or older (often 55 years old). These communities may be organized like a condominium, in which the responsibility for exterior maintenance and landscape maintenance falls to the association, with monthly fees to support those activities. Other amenities, such as swimming pools and tennis courts, may be supported by the same monthly fee.

Co-housing

A form of group living which includes independent living units, built and operated by an intentional community. There may be some organized activities and there are communal meals. Such communities are difficult to organize and maintain, as costs and chores are shared and changes to the community require consensus.

Personal care homes (board-and-care)

Group assisted living in a facility. Meals, personal care, administration of medications, and some group activities are included. These facilities are required to have nursing staff on duty 24 hours each day, but are not as strictly licensed as an assisted living facility or skilled nursing facility.

Domiciliary care

Group assisted living in a home-like environment. Assistance with cooking, cleaning, laundry, shopping, transportation, reminders for taking medications, coordinating medical appointments, and some group activities are included. These are usually in private homes, accommodating up to three individuals who are 18 years or older, and who have physical or mental disability or other limitations. Homeowners are paid $978 per month for each person hosted.

Other care

Skilled nursing facilities, dementia care facilities, hospitals, and hospice care are not included because they are more in the realm of health care than housing. The County does offer some assistance for nursing home placement and services.

Housing Affordability in Swarthmore

Housing is considered affordable if the annual cost is below 30% of income. Annual cost at or above 30% of income is considered not affordable. Housing costs include mortgages, real estate taxes, utilities, and insurance, but not maintenance costs. For Swarthmore's senior household owners, 26% live in units that are unaffordable. Housing mix can be indicative of affordability, and the mix as noted above is broad. (See Appendix 2 and 6 for housing census data and graphs.)

For owner-occupied housing, 60% (285) of 65+ resident householders live in single-family detached houses. 32% (155) live in multi-family housing of 50 units or more. 102 householders live in renter-occupied housing, with 70% (71) living in 2- to 4-unit housing.

Median rent in Swarthmore is $904 a month (in 2014 dollars) which is considered not affordable for about half the seniors in the Borough. Banks often consider location when extending credit, and since Swarthmore is transit accessible, they may give a break on the affordability equation because residents can spend less on transportation costs. There may be rent subsidies available in the form of Section 8 vouchers. Section 8 rents are set at $700 to $760 per month or a maximum of 30% of someone’s income, with the Housing Authority paying the difference from the market rate. Swarthmore has two apartment buildings with subsidized units, the Greylock Apartments and Dartmouth House. Section 8 vouchers and other publicly-subsidized housing usually have a waiting list, and it's important to get on the list as early as possible.

The Greylock Apartments on South Chester Road have 52 rental units in one building; the Dartmouth House has 60 apartments in two building groups on Dartmouth Avenue. The Greylock building has an accessible entrance and an elevator, while the Dartmouth House has stairs between the sidewalk and the central entrance buildings.

Housing affordability is also affected by taxes, which are relatively high in Swarthmore. School taxes make the largest portion of the property taxes paid by Borough residents. A more equitable school funding mechanism, adopted and operated statewide, would result in lower taxes for most homeowners, and might make it more affordable to live in Swarthmore. Pennsylvania is in the lowest 20% of states in contributions from state revenues toward public education. In 2015 New York State allocated $19,818 per student, New Jersey allocated $17,572, and Pennsylvania just $13,864. The Commonwealth's contribution toward public education represents just 34% of the funding needed, whereas the national average contribution from states is 45% of the total, leaving our state at the 47th lowest in the country. The rest of the funding to operate public schools is obtained through property taxes. Swarthmore relies almost solely on residential property taxes, with little in the way of commercial property to take some of the burden from homeowners. In addition, a very large percentage of the land in the Borough is the property of Swarthmore College, which though it makes payments in lieu of taxes to the Borough and the School District, is not taxable.

The cost of home maintenance is a factor in affordability as well. When most tasks end up needing to be paid for, as opposed to doing them oneself, the cost of home ownership rises significantly. Family and neighbors may be relied upon for some tasks around the house, but many people are reluctant to impose on others for all the things that need to be done. A time-banking arrangement such as proposed in the General Recommendations might help to get some of the work done.

Major home repairs often come at the least convenient time and like regular home maintenance, the cost of home ownership rises significantly when they do arise. After many years serving as the family home, deferred maintenance and general wear-and-tear begin to take their toll, and repairs and replacements of major systems such as heating and air conditioning, plumbing, and outside structures need to be done. These are the types of repairs that often require large financial outlays, and on a fixed income paying for them can seem insurmountable.

One source of income which may make home ownership more affordable is the "reverse mortgage" or a Home Equity Conversion Mortgage (HECM), in which the equity in the home is turned into a monthly cash payment to the borrower, and is paid off when the home is sold. Homeowners taking advantage of this product are still responsible for maintenance, taxes, and insurance on the home.

Accessory dwelling units can also provide a source of income for the property owner and, based on the median rent noted above, the income may be significant, thus allowing a property owner to remain in their family home.

Housing may be made more affordable and perhaps more convivial by combining households in a single home. Up to three unrelated individuals are permitted to live in a single dwelling in Swarthmore. Sharing costs of maintenance, utilities, food, and perhaps even transportation, the residents can reduce the amount of money they spend and have a close community as well. Ideally the residents would have known each other in advance of making this arrangement, but there are services that will vet candidates for the group and make the connections.

Depending on meeting eligibility requirements, certain services related to aging in the home are available through the County, or are otherwise available on the market or through other agencies. These include assistance in making modifications to the home, housekeeping, transportation, and adult day care services. A member of the County's assessment unit will visit the home and review the client's medical conditions, financial conditions, and the condition of the physical environment.

In interviews with older Swarthmoreans who no longer live here, those who have recently relocated here, and those who plan to age-in-place in Swarthmore;

- Some still work several days each week; they need to continue to have access to transit, but may not need a house as large as the one they raised their families in.
- The cost of upgrading an existing house seems to be prohibitive. And costs of maintenance will continue anyway. They would rather leave the money to their children.
- A new resident has moved to the Borough to be near children and grandchildren. She would like to live near her children, but not necessarily with them. Housing options like that are limited.
- Staying in Swarthmore depends on the affordability of the living situation; currently taxes are an issue; would like a smaller living space with proximity to downtown; some people would consider an apartment if affordable; would consider house sharing and also co-housing.
- A long-time resident needs to look at other options for living situation, with more health care, but is limited by the amount of money he has to spend.
- A couple stays where they are because the alternatives are so expensive; they would prefer to leave their money to their children instead of giving it to a retirement community. They have problems enough with upkeep of house, but shoveling of the walk is beyond their ability and their means.

INTERVIEW: Woman Age 65+

"*Staying in Swarthmore depends on the affordability of the living situation. Current taxes are an issue. I would like a smaller living space with proximity to downtown. I would consider an apartment if it were affordable and would consider sharing a house. I'm also definitely interested in co-housing!*"

Housing Accessibility in Swarthmore

To determine a person's ability to live in their home an occupational therapist may need to evaluate existing living situations and make recommendations for modifications that will make the home more amenable to a senior person or someone with disabilities. The occupational therapist's primary concern is safety and reducing the likelihood of falls. Even if the home is fully accommodating, however, everyone needs to get out of the house from time to time: to see doctors, for social engagements, to do shopping, or to run other errands.

Rather than having to adapt our lives to our houses, ideally we should have our houses adapt to us. At the Housing Forum Lynda Lemish noted that this also applies over time, so that our houses should adapt to changes that we experience as we grow older. She said that there are three basic types of people when it comes to making choices about adapting their homes to their changing conditions:

- **Planners** are those who think ahead, long before a need arises, and make changes to their environments as well as to their own health, that will serve them into the future.
- **Progressive Condition Thinkers** are those who adapt as things and conditions change in their lives, reacting to situations and making changes as needed.
- **Traumatic Change Responders** are those who react to catastrophic change, and are often left with fewer and more expensive choices.

In any case, better planning reduces cost.

Bob Fatscher addressed the costs and the decision-making process at the Housing Forum. The cost of renovations needs to be weighed against the benefits of staying in a home. For example, as we grow older more home maintenance needs to be done by outside helpers, adding to the cost of home ownership. In addition, many people as they age will use more utilities during the winter than they did previously.

The benefits of staying in their existing home include continuing to have a place for family to gather; history of the family in that home; and gardening or other hobbies that the home accommodates. It also eliminates the need to move, to clear out accumulations, to leave neighborhood friends, and change lifestyle.

Costs of staying in the family home include the expense of maintenance; taxes; heating and cooling; renovations, as needed, will get more expensive each year; and resale value of the house will depend on maintenance and on the modifications that have been made.

As noted above, a person staying in their home will face safety issues, including the safety of the additional workers required to help maintain the home or to provide healthcare or other services; securing healthcare services at home; and perhaps having limited access to all parts of the home.

Again, in interviews with older Swarthmoreans;

- Current housing often has accessibility problems; many would consider a ground level living space; they still like all the space, land, and privacy of their own homes, though.
- One resident lives in a single-floor home rented from the College; she pays for general care and for repairs to the house. She drives and is close to the College campus, where she attends programs. She can shop at the co-op, go to the library, and uses the Swim Club. She likes the mix of people in her neighborhood.
- A resident of an apartment building wonders if the Borough can put some pressure on apartment building owners to address the needs of older residents. Her apartment had previously been renovated for accessibility, but others are not so lucky.

INTERVIEW: Man Age 74

"*My wife refuses to live in a continuing care community. We also considered an apartment, but prefer having more space, land, and privacy. However, our current house has accessibility problems with narrow steps and steps to the second floor. A ground level living space would help.*"

HOUSING KEY NEEDS

Finding the Appropriate Home

Considering the time frame involved in making major changes to housing in the Borough, it makes some sense to listen to Swarthmoreans who are now between the ages of 45 and 65. This group will be entering retirement age in the next 2 to 22 years. According to the latest US Census, they comprise 51% of the adults living in Swarthmore. Beth Murray designed and conducted a survey in 2015 to determine whether this group has thought about where they would live once they reached retirement age, what types of housing would they be looking for, and whether the types of housing they were looking for are currently available in Swarthmore. She reported on the results at the Housing Forum. When asked whether they would consider down-sizing their home, over 80% indicated they would.

The factors in making the decision about a down-sized home were, in order of importance

1. Lower costs
2. Walkability
3. Lower maintenance
4. Wanting independence and privacy
5. Room for guests
6. Ability to lock and leave
7. Quality of design
8. No waste
9. Accessibility (i.e. first floor bedroom)

About 64% would prefer to move to a small single-family house (condo 27%, twin 24%, townhouse 23%, apartment 17%, Plush Mills 13%). The ideal downsized living space would have one floor, low maintenance, be charming, have light, be close to town, be easy and comfortable. A new modern residential building close to town would be the preference of 70% of respondents, while 60% would move to a new townhouse close to town. Respondents generally desire to own rather than rent.

These results would lead to the conclusion that smaller forms of housing (1- and 2-bedroom homes) within a half-mile of the town center would have a ready market for those who are reaching retirement age and who want to downsize.

A further conclusion can be drawn that the large houses that would be vacated in favor of the smaller homes would then become more available to families with children, thus bolstering the economy and the school district for future generations.

In Subcommittee interviews with older Swarthmoreans;

- A couple love their home, which they have lived in for 20 years; they've put a lot into the house and would not like to leave it; walkability to downtown and to the train station are very important; they might consider downsizing to something smaller; the current house would need a downstairs bathroom.
- Many years ago this couple moved here for schools, diversity of population and housing types. They love the walkability to downtown. Now they live in a single-floor apartment in an elevator building, well managed, and see no reason to leave.

The need for senior housing in the downtown area has been identified in past studies as well. The 1999 *Swarthmore Town Center Revitalization Strategy* report notes this as one of eight commonly-held values of the borough (p.3) and includes senior housing as an objective toward meeting the goal to "protect and maintain the neighborhood-friendly village character of the town center" (p.6) and the goal to "encourage an intergenerational town center" (p.19). The Multi-Municipal Comprehensive Plan (MMCP) of 2006 does not directly address senior housing downtown, but does include the goal to "support senior housing needs…including new housing opportunities and options for aging in place" (p.2-45).

Sadly for our community, sometimes finding the appropriate home may mean leaving Swarthmore. People often want to live nearer to other members of the family, or they prefer the safety and community of a continuing care facility.

In Subcommittee interviews with older Swarthmoreans;

- A long-term resident has loved living in Swarthmore, where it is so walkable, but decided to move to continuing care so that the kids don't have to worry about health care issues or maintenance on the house.
- Another Swarthmorean had already cared for her parents, aunts, etc., and didn't want to impose that on her own children; also, their neighborhood had changed—she and her husband were left alone on their block with new people who didn't really care about them. They wanted a social life and to have friends nearby; continuing care is very important for those reasons.
- This senior resident got heavy pressure from family (who all live far away) to move; Swarthmore is a lonely place for an old single man; he had no close friends left in town.
- At a certain point one avid gardener realized she couldn't garden any more, and her husband was slowing down, too, so they looked for a continuing care community. They liked the one they found, and they already had friends there.

INTERVIEW: Man Age 74

"*My wife refuses to live in a continuing care community. We also considered an apartment, but prefer having more space, land, and privacy. However, our current house has accessibility problems with narrow steps and steps to the second floor. A ground level living space would help.*"

Unmet Needs

While the Borough does not lack for beautiful homes in which a family may live many decades, these same homes often prove a burden for those same families when they are only a couple or a single person and getting older. The costs of utilities, maintenance, and taxes stay at the same level as when the house was full of children, and those costs can also rise. The physical layout in many of the homes becomes a problem when mobility issues develop or if live-in assistance is needed.

A family has a choice to make as its members age: 1) modify their existing home to accommodate the requirements of aging members, or 2) move to another home, or 3) do nothing and wait to see what happens (which often devolves to one of the first two choices). There are many factors in making such a choice, and there are multiple options within each choice. "Aging in place" can be accomplished with any of the three choices, though in Swarthmore the options are limited if one chooses to move to another home.

Building codes and zoning regulations are sometimes not age-friendly and are difficult for lay people to understand.

- Contractors and homeowners are generally unaware of methods to improve visitabiltity, and the ability of the current regulations to require accessibility are limited.
- Building codes, permits, zoning variances and special exceptions are legal requirements that are difficult for residents to know about and even more difficult to implement.
- The Pennsylvania Uniform Construction Code (UCC) permits local governments to modify the building code only with a lengthy and somewhat cumbersome process, so it seems unlikely that the code could be used to accommodate age-friendly, affordable design for older homes and residents beyond what is already required.

BEST PRACTICES

Higher-density housing has been the bellwether of good urban design for the last 30 years. New communities that emphasize walking and bicycling over automobile use, and easily accessible urban spaces over private yards, have seen a resurgence in residential construction. Many older suburbs have encouraged new housing types—namely townhomes and apartment dwellings over retail space—to increase the variety of housing available, and to accommodate differing family needs. In some suburban areas that are blessed with good mass transportation, these new building types are located near transit centers, again minimizing the need for automobiles.

In the specific realm of housing for seniors, certain recent developments are noteworthy:

- **Naturally-Occurring Retirement Community (NORC)**: In an existing multi-family building or collection of buildings, the management company or landlord may apply for funding from the state or federal government to provide services to their residents, 40 percent of whom must be over 60. Typical services that are brought to the facility might include meals-on-wheels or a hot meal on a regular basis; preventive health care exams and inoculations; beauty and barber care; entertainment programs, and; religious worship services. Other services that might be provided include transportation to healthcare offices, shopping, or entertainment; daily check-in services; a guest apartment; and exercise space. Providing such services might require conversion of existing public space, office space, or residential space into public spaces for these purposes. NORCs are not exclusively for seniors, offering an attractive alternative to an exclusive senior living facility.
- **Green House**: A group elder home where each resident has a private bedroom and bath, and features large common rooms and dining tables to seat all residents and staff. A Green House has live-in staff, and is usually limited in size to about 12 residents. While these are typically new-built facilities, a conversion of a large home or other building could work to provide the same home-feel living and care facility. Most homes in Swarthmore would require major renovation to work as a Green House, beginning with the installation of an elevator and including construction of private bathrooms and a living unit for the live-in staff.
- **Intentional Community**: A variation on the themes of accessory dwelling units and shared housing is an intentional community of small—possibly temporary—dwelling units grouped around community facilities, perhaps a grand old home. Elder cottages, “granny pods”, "Tiny Houses," or Practical Assisted Living Structures (PALS) and other names are given to the type of minimal living units that could be co-located with others and with a building with a large kitchen, dining room, living room, and perhaps other amenities such as an exercise room. Some of the challenges of co-housing noted above might also be experienced by an Intentional Community, but it offers yet another option to those who wish to remain in Swarthmore.

Cottages could be clustered around an existing building or built in conjunction with a new community space.

Some suburbs have allowed—and even encouraged—new housing in the form of accessory dwelling units on existing single-family properties to allow seniors to stay in their homes or to at least stay on their own property. Accessory dwelling units can provide a place for family members or professionals to live and help take care of them.

A temporary structure may be placed in back yards where space is available. It offers an alternative to nursing homes or the lack of privacy and feasibility associated with converting a first floor dining room or other space. In Virginia, MEDCottages are permitted through a 2010 state law that allows temporary medical dwellings on a resident's property as long as a physician verifies that the patient needs assistance with at least two of the main daily functions–bathing, eating, toileting, and dressing–and the unit is removed when there is no longer a need.

An accessory dwelling in a backyard of a single family home (left).

A MEDCottage (right), one of several modular home options that come with accessible and medical technological features. [www.medcottage.com]

The concept of *visitability* is an extension of the move toward accessibility in facilities and programs over the last several decades. It is one thing to be able to live, work, worship, and be entertained in a facility that accommodates all physical abilities, but then to not be able to visit a friend or relative because their homes are not accessible can be yet another barrier to a full meaningful life. In this light, a drive to educate everyone on how making their homes more accessible for visitors has begun. Governments offer incentives for homeowners to modify their homes to make them more accessible.

RECOMMENDATIONS

Housing Recommendation #17. Encourage the creation of a range of affordable housing options near downtown.

Townhomes and apartments that require little or no direct maintenance by the homeowner, and which are fully accessible and are within walking distance of downtown, will have a ready market. Building housing within a half mile of downtown with reduced parking requirements would encourage the construction of more residences, or more space per residence. The proximity to downtown would allow residents to be more involved in community life, as well as to shop and take care of other business without the expense of car ownership. Fewer cars will also lead to less traffic. Building housing over retail and office space within a half mile of downtown, with the reduction of parking requirements noted above, will help both the survival of retail and restaurants in the downtown are, but will also provide a safer downtown environment for everyone. "Eyes on the street" are a proven method of keeping sidewalks and parking lots safe. Easy access to the amenities downtown will make those amenities all the more attractive.

Perhaps by joining two or more large homes, or a completely newly-built facility on vacant land, a small congregate living option might be made available for residents to continue to live in the community. There is not enough land for a full continuing care facility, so this congregate care option would appeal to those who are relatively self-sufficient. There are many models for such a community, but three that seem quite appropriate to Swarthmore are Naturally-Occurring Retirement Communities, Green Houses, and Intentional Communities, described above.

Implementation recommendations:

- Through planning, zoning and tax incentives, facilitate adding low-maintenance, affordable townhomes and apartments within a half-mile of the train station.
- Consider expanding multi-use buildings outside of the Town Center to provide additional housing and parking options.
- Through planning, zoning and tax incentives, encourage the establishment of one or more senior living communities, such as a Naturally-Occurring Retirement Community (NORC), an Intentional Community (cohousing), or a Green House (a group assisted living home).

Housing Recommendation #18. Provide opportunities for diverse housing options throughout Swarthmore.

With zoning requirements for setbacks and other form-based criteria, as well as for off-street parking, the creation of an accessory dwelling unit on a lot with a single family home could provide a place for a caregiver to live, or an alternate, accessible place for the aging family members to live. An ADU can also provide additional income which may help senior residents stay in their family home and make the needed renovations. ADUs can be developed within the primary residential building, incorporated into an accessory building such as a garage, or built as a separate accessory building. It is also possible to allow ADUs as temporary or mobile buildings.

ADUs are typically smaller than the primary residence in terms of square footage, and have their own bathrooms, cooking facilities, and private entrances. ADUs can provide an affordable option for some families who wish to live close to family, friends, or other caregivers in their preferred neighborhood or community.

Implementation recommendations:

- Modify zoning to allow a mother-in-law apartment (Accessory Dwelling Unit) in a single-family home or in a separate building such as a garage.
- Subject to location, change the zoning regulations to allow the conversion of large homes into apartments or condominiums.
- Consider a provision to allow temporary elder housing such as “granny pods”.
- Support a more equitable statewide funding mechanism for schools in Pennsylvania, resulting in lower property taxes for most homeowners.

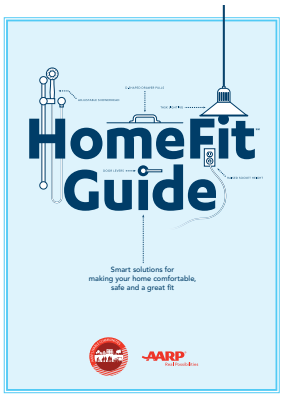
This Accessory Dwelling Unit is located in a garage in an Ashville, North Carolina historic district.

Housing Recommendation #19. Increase awareness of housing accessibility through education; modify Borough regulations to improve accessibility of homes.

Accessible housing may be considered a public health issue via building codes and a civil rights issue from a disability perspective. The Pennsylvania Uniform Building Code may prevent adoption of requiring a more strict standard, so Swarthmore may be limited to educational materials and marketing outreach to homeowners and area architects. The Borough may wish to determine if passing a visitability ordinance could be considered a planning ordinance or building ordinance. Planning ordinances have the ability to deal with a number of items such as the height of the building, house setbacks, and other elements as the specified in the Town Center ordinance. The current building occupancy permit also includes a requirement for a basement stair railing. Including such requirements has been successful in places such as Atlanta, Georgia, and Cincinnati, Ohio, where they were adopted city-wide.

Accessible components for visitability could include:

- Accessible path between parking and an entry.
- No-step entrance.
- Entrance door 36 inches wide with exterior lighting of entrance.
- Interior doorways at least 32 inches wide or more.
- Hallways at least 36 inches in width.
- Lever handles on doors.
- Structural blocking for grab bars in bathroom walls near toilet and shower.
- A first floor bathroom.
- A first floor bedroom or a room that could be used for a bedroom in the future.



This educational publication provides a graphic checklist to make a home safe and comfortable. [AARP, Home Fit Guide, 2015]

Implementation recommendations:

- Expand the Borough's website to include details on "Visitability" and how to make a home accessible.
- Actively disseminate accessibility information to realtors, new home buyers, contractors licensed by the Borough, and through the land development and building permit process.
- Allocate a small portion of the building permit fee to promote and implement accessibility and aging-in-place in Swarthmore.
- For homeowners, provide a Visitability Design Tax Credit. For a builder or a developer, consider tax incentives for providing a percentage of accessible and affordable housing, or grant floor area ratio bonuses when visitability elements are incorporated. An impact fee for accessibility might also be considered.

PENNSYLVANIA RESIDENTIAL VISITABILITY DESIGN TAX CREDIT ACT

"a local governing body to authorize, ordinance or resolution, either a tax credit of up to $2,500 for any new or redeveloped housing that contains visitability features or the amount the property tax would increase for the first five years, whichever is less."

Some accessibility features that would comply with the credit include zero-step entryways, wider doorways and hallways, reinforcing bathroom wall framing to support grab bars, light switches within reach, and an entry-level bathroom.

Act 132 of 2006

PLANNING AND ZONING RECOMMENDATIONS

INTRODUCTION

Planning, zoning, and other municipal ordinances play a significant role in shaping a community by regulating housing form and building use. As with all municipalities, the regulations in Swarthmore directly impact a resident's ability to afford living in the community, along with that resident's access to a diverse housing stock, transportation, cultural facilities, services, and connections to other neighborhoods.

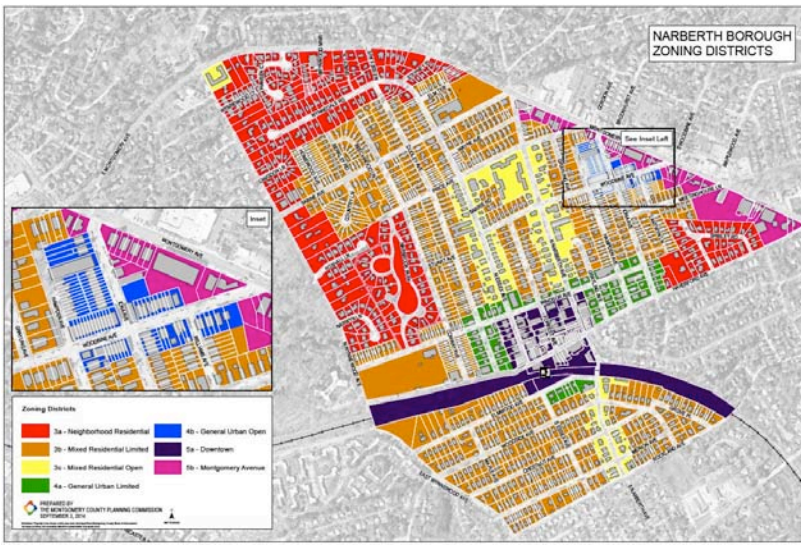
With an increasing desire to remain Swarthmore, many of our citizens are looking to grow older in their family home or move to a smaller living space within the community. Multiplying numbers of baby boomers are looking for workable and affordable solutions, making it increasingly difficult to find suitable housing options in Swarthmore or to be able to make renovations that would be allowed under the current zoning code.

The changing demographics of today's households create a growing demand for flexible types of housing to accommodate a broad range of household combinations and incomes. There is already consensus that Swarthmore is highly valued as a walkable, sustainable, caring community that actively supports all its residents. These two factors combine to offer an opportunity for Swarthmore to take a leading role among suburban communities in providing a place where all generations are welcomed.

RESEARCH

To better inform the Task Force on planning and zoning issues, a number of tasks were undertaken during 2015. Research ranged from broad aging-in-place topics to specific policy reports from the American Planning Association and other township zoning ordinances. Special attention was paid to current trends and best practices within the planning profession.

Throughout the year, the Planning and Zoning Subcommittee coordinated with other Task Force subcommittees and participated in resident interviews. Because planning and zoning have a direct relationship with housing and transportation, a number of subcommittee meetings were devoted to discussing those issues and recommendations.



The zoning ordinance from Narberth, PA, is an example of one of the detail documents that was part of the research process. [Narberth Borough Form Based Zoning Code, Appendix, November 2014.]

On June 9, 2015, a Public Form was held to explore trending topics in planning and zoning. An open discussion between the invited professionals and all who attended encompassed a number of topics: existing zoning and housing affordability in Swarthmore, and regional and County trends in planning and zoning, (See Appendix 3 and 6 for more details.) Panelists included:

- Jane Billings, Swarthmore Borough Manager and Zoning Officer
- Justin Dula, AICP Manager of Community Assistance, County & Regional Planning, Delaware County Planning Department
- Sam Haber, Principal Planner, Del. County Planning Department
- Ray Ott, AICP, Principal, Ray Ott & Associates
- Nanci Sarcinello, AICP, Principal Sarcinello Planning & GIS Services

EXISTING SWARTHMORE PLANNING AND ZONING

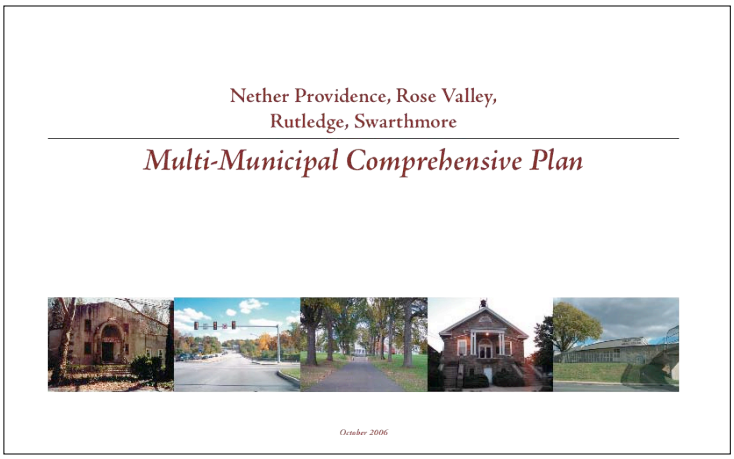
Zoning of land use is the single most important legal tool available to a municipality for managing growth and development. The Swarthmore code outlines the various advisory commissions, councils, and boards, as well as the powers and duties of the Zoning Hearing Board that hears applications for variances, appeals, and Special Exceptions. The zoning code maps zoning districts and details use regulations in that district.

The companion Subdivision and Land Development Ordinance (SALDO) regulates parcels that are subdivided or combined, as well as larger construction projects that involve streets, utilities, and buildings that require municipal review. Because most of Swarthmore has been developed, SALDO is not used very often other than for a new Swarthmore College building, for example.

The Comprehensive Plan, required by Pennsylvania state law, guides growth and land development of a municipality. Swarthmore completed a multi-municipal comprehensive plan in cooperation with nearby communities, summarizing existing conditions and making recommendations for transportation, housing, land use, community facilities, economic development, natural and historic resources.

The *Multi-Municipal Comprehensive Plan* was prepared in 2006 for Nether Providence, Rose Valley, Rutledge and Swarthmore for use in guiding future development. Key action strategies of the Comprehensive Plan relevant to the Task Force's issues are:

- Diversify Housing Stock. Determine ways to provide a diverse housing stock and housing options for the needs of different populations.
- Preserve Existing Housing Stock. Pursue methods to preserve existing housing stock.
- Cluster Housing. The suitability of cluster housing should be studied and zoning regulations developed if appropriate.



- Support Senior Housing Needs. Review existing housing available for seniors and recommend needed improvements, including new housing opportunities and options for aging in place, including policies and programs in areas that will help seniors maintain their homes (these might include support services in the areas of transportation and social services).

- Large Parcels. Evaluate larger parcels for new or alternative land uses.

- Accessory Structures. Evaluate existing and possible future uses of secondary and/or accessory structures in the Borough.

- Add an Institutional-Residential Transition Zone. Consider the development of a transition area between institutional uses and single-family residential zones. Suggestions include the option of regulating buildings through setbacks and other means or creating an intermediate zoning district on both sides of the current zoning line in which smaller scale multi-family buildings are permitted.

- Transportation Strategies. Provide a balanced transportation system with multimodal options.

ANALYSIS AND KEY NEEDS

In 2011, the leading edge of the Baby Boom generation reached age 65. By 2013, more than 70 million Americans–twice the number in 2000–will be 65 and older. At that time, older adults will comprise nearly *one in five* Americans. Swarthmore reflects national projections as revealed in the census data. (See Appendix 3) However, without creating additional housing units for those wishing to downsize and without improving transportation options, Swarthmore will continue to lose an important and growing segment of its residents. As such, there is an urgent need to integrate the housing, transportation and other aging-in-place goals into the municipal planning and decision-making process.

Zoning regulations and finances make not only pre-existing non-conforming uses difficult to continue, but also create formidable obstacles for new uses or residential types to be created. A few contributing factors that currently prevent fulfilling key needs are listed below.

- Partially due to creating nonconforming uses when zoning was implemented in 1976, Swarthmore has seen the continued disappearance of apartments and retail mixed land uses in residential districts that were once commonplace in all villages.

- Outside of the Town Center, there is a separation of land uses perpetuated by the existing zoning code that primarily supports single-family homes as the status quo.

- Even though the zoning code allows for two-family house conversions in residential districts, it requires a Special Exception which is viewed as a difficult approval process with additional provisions and costs.

INTERVIEW: Woman Age 76

"*I moved here to be near my grandchildren, and would have moved into an in-law apartment on my son's property, but they are not permitted by code. Now I live alone in a rental.*"

- Although Congregate Housing for the Elderly is listed as a possible use, it is allowed only by Special Exception and in the Alternate Residential and Town Center zones. The current definition and use applicability does not effectively create the availability of desired shared housing.

- Residential zoning and subdivision regulations for most districts stipulate that the minimum lot area is calculated on a per dwelling unit basis, effectively prohibiting types of housing other than a single-family residence.

CURRENT TRENDS AND BEST PRACTICES

Trends in Planning and Zoning

Planning and zoning in the 21st century has continued moving away from the 90-year tradition of separating uses and toward the integration of uses that are compatible and easily accessed from each other. In recent years, there have been increasing examples showing that changing the approach to planning and zoning helps re-establish the village life that existed prior to the creation of zoning ordinances. The themes in this vision are:

- Being able to live within walking distance of public transportation, parks, schools, and services.
- Having a broad range of affordable housing options, especially a supply of smaller, accessible housing units.
- A sustainable, intergenerational community that promotes social connections and civic involvement.

Planning terms that embody these themes include:

- Complete Streets seek to make streets safe and accessible for drivers, walkers, bicyclists, and wheelchair users of all ages and abilities.

- New Urbanism promotes walkable neighborhoods and denser mixed-use development near transit. It promotes community interaction such as front porches, sidewalks, and narrow streets. New Urbanism integrates the full range of housing types throughout a community so that residents of all ages have a choice of apartments, townhouses, and single-family houses with or without an accessory apartment. This planning practice, which dates from the 1980s, has ten principles that speak to the quality of life in a community. (See http://www.newurbanism.org/ and the Congress for New Urbanism https://www.cnu.org/).

- Sustainable Communities focus on energy and water use, housing, transportation, education, health, and job creation that can be sustained over time. (See https://www.sustainablecommunities.gov/ and http://www.sustainable.org/)

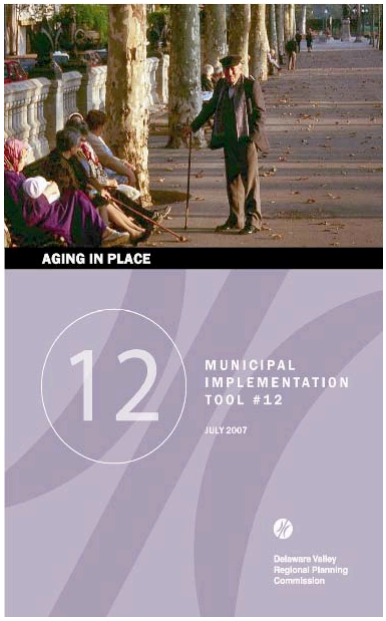
Seaside, Florida, the first New Urbanist town from 1981, features many elements that have been replicated throughout the United States: compact, walkable neighborhoods, mixed-use buildings, green spaces, a range of housing to serve a diverse population, and quality design that emphasizes human scale.

- Walkable Communities are designed around the needs and desires to connect, measuring how friendly an area is to walking. The America Walks organization has rated 2,500 cities for their walkability. (See also Walkable and Livable Communities Institute http://www.walklive.org/)

- Smart Growth is an urban and transportation planning approach that seeks to concentrate growth where there are housing and transportation choices near jobs, shops, and schools. (See http://www.smartgrowthamerica.org/)

In view of the projected increase in the number older adults 65 and over, the American Planning Association (APA) adopted an *Aging in Community Policy Guide* in 2014 to outline a comprehensive approach for professional planners. The guide encompasses a full range of planning topics on affordable housing, accessibility, transportation, community facilities, and the well-being of older adults and their caregivers. To promote age-friendly communities nationally, the APA has outlined a number of specific policies for planners to implement.

Regional planning commissions often are the leading translators of national policy and community planning trends. The Delaware Valley Regional Planning Commission (DVRPC) has long been a proponent of adopting the concepts of sustainability, Smart Growth, Transit-Oriented Development, and Complete Streets. In 2007, DVRPC issued *Municipal Implementation Tool #12: Aging in Place*. In addition to recommending local property tax reform, DVRPC encourages municipalities to modify a number of planning tools to better accommodate an aging population. Its goals stress incorporating accessibility and universal design standards into new construction designs and building codes.



Aging in Place, DVRPC, 2007.

DVRPC also recommends that townships "expand and preserve the stock of accessible, affordable housing units for seniors." To translate these goals into action, DVRPC suggests that municipalities revise ordinances to allow specific housing options such as shared housing, accessory dwelling units, and elder cottages. Planning and zoning ordinances should allow:

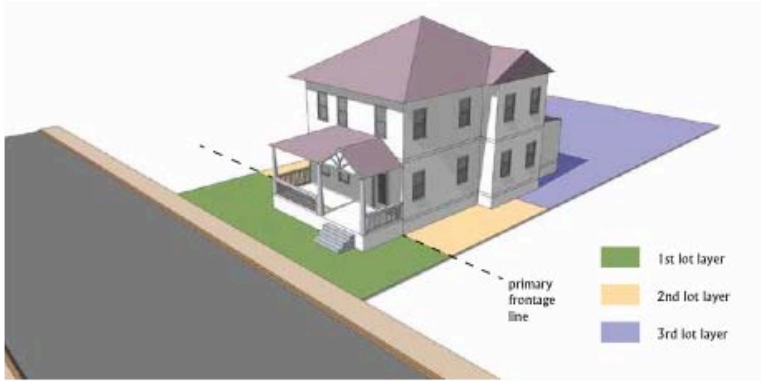
- A variety of housing types and increased densities.
- An integration of land uses.
- Unrelated older adults to share homes in single-family residential zones.

The APA's and DVRPC's implementation policies are two examples that reflect current best practices of the planning profession. Of those, the three that are of particular interest to the Aging-in-Place Task Force in Swarthmore are: Form-Based Zoning, , Accessory Dwelling Units, and Transit-Oriented Development.

Form-Based Zoning Codes

A form-based code is a way to regulate development based on specific physical design standards instead of use and bulk standards. With the purpose of achieving a sense of place based on a community vision, design guidelines focus on the scale of a building and how it relates to the surrounding area. Nationally, there are growing numbers of municipalities that employ Form-Based codes. The Form-Base Code Institute maintains a selected library of about 35 Form-Based code examples that have been enacted nationally. Many of the documents include graphics that illustrate the design guidelines (see http://formbasedcodes.org/). For local Form-Based zoning examples, see Appendix 7.

In 2013, Swarthmore passed a Form-Based code limited it to Town Center district, a significant departure from the 1970s zoning ordinance. It incorporates leading-edge planning techniques to guide changes in the downtown area.



The illustration and photograph provides a good example of how community values can be translated into a form-based zoning ordinance. A community that wishes to promote social interaction and architectural character by retaining porches can stipulate that front porches are allowed in the front yard setback. [Left, Narberth Borough Form Based Zoning Code, Appendix, Diagram: Lot Layers, November 2014; right, Google website Images.]

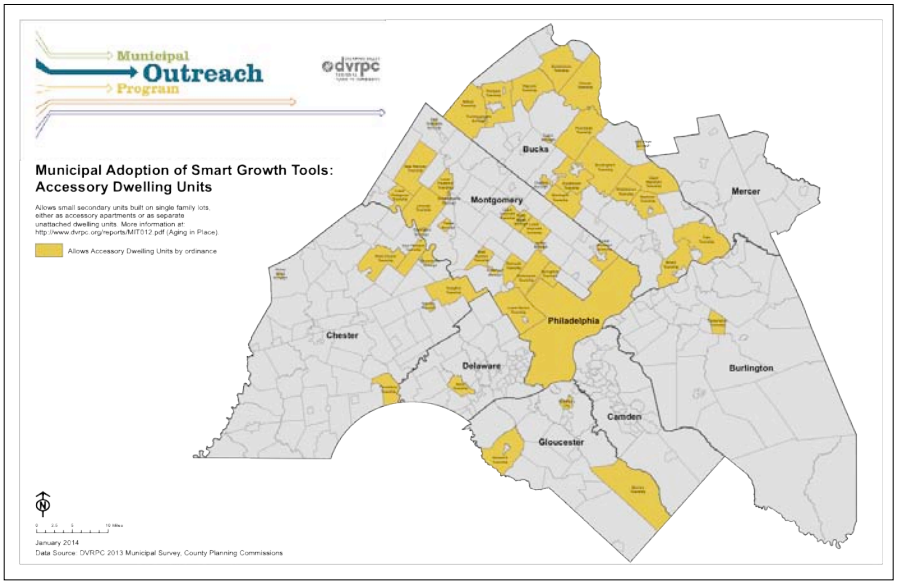
Accessory Dwelling Unit (ADU)

An Accessory Dwelling Unit is a complete independent residential living space that is within, attached to, or detached from a single-family home. Although it is designed as a separate unit with cooking facilities, it usually shares utilities with the other residential unit. While the term may be relatively new, an apartment for a mother-in-law, a farm worker, or as a rental has been very much part of the history of land use in the United States. Gaining in popularity, there is a website to promote ADUs: http://accessorydwellings.org/.

An ADU can be located as an addition to a house, in a separate accessory building, or as part of the main residence. Some ordinances require that an addition or accessory building match the building materials of the primary dwelling. [Left, Minneapolis, MN ADU ordinance; right, detached ADU in Cameron Park, Raleigh, NC]

ADU ordinances have been in existence since the 1980s (see Appendix 7). Although Santa Cruz, CA, and Lexington, MA, are often cited as models, each Accessory Dwelling Ordinance is tailored to meet the needs and conditions of a specific community. Provisions that vary in an ADU ordinance include allowing ADUs by right or by Special Exception, the presence or absence of the homeowner, limiting or not limiting the square footage or number of bedrooms in dwelling units, the location of the entrance, if there are parking requirements, and whether ADUs are allowed in accessory structures.

In this region, planning agencies actively promote the adoption of ADUs. The Delaware Valley Regional Planning Commission (DVRPC) promotes ADUs an important municipal zoning tool. *Implementing Connections: A Guide for Municipalities* specifically mentions ADUs as one municipal tool to support affordable housing and housing for seniors.



In 2013, DVRPC completed a survey of municipalities that allow small secondary units built on single-family lots, either as accessory apartments or as separate unattached dwelling units. Numbering about 50, the ADU ordinances range from rural areas like Honey Brook that designed the ordinance primarily to accommodate farm workers, to urban Philadelphia. (See Appendix 7 for Philadelphia's ADU ordinance.)

Municipal Adoption of Smart Growth Tools: Accessory Dwelling Units [DVRPC January 2014]

Montgomery County Planning Commission (MCPC) has taken several initiatives to help communities plan for aging in-place. They have a model Accessory Dwelling Ordinance (at right) and assist municipalities in their implementation.

ACCESSORY DWELLINGS (AD) MODEL ORDINANCE EXAMPLE

Montgomery County, PA

Montgomery County Planning Commission created a model ordinance to increase the availability of worker housing. Envisioned as a separate structure on a single-family lot or as an attached structure like a converted garage, the provisions said that:

- AD must meet all setback and coverage regulations
- ADs should be no more than 40% of the size of the main home
- Units must be buffered from abutting homes with landscaping
- Accessory units may not be sold separately
- It should not restrict occupancy to a relative, caretaker or employee of homeowner
- Homeowners should be allowed to lease the AD

Promoting Workforce Housing: Expanding Locations and Development Potential, Report 3, Montgomery Planning Commission, [http://www.montcopa.org/]

Transit-Oriented Development (TOD)

Transit Oriented Development encourages compact mixed-use development near transit stations. TOD zoning districts are often adopted as an overlay zone, meaning that they do not replace the original zoning but add or "overlay" more development possibilities and regulations. Public funding or other incentives are often associated with TODs.

The Pennsylvania Public Transportation Association (PPTA) encourages the implementation of Transit-Oriented Development through its website with its toolkit on designing communities around transit (http://www.ppta.net/todtoolkit/). The PPTA lists the various community, environmental, and public benefits of TODs, and provides a few examples such as Bryn Mawr and Marcus Hook. The website provides a number of model zoning ordinances and reports that highlight town centers similar to Swarthmore's.

Multi-family buildings can be placed near parks or playgrounds, while multi-use structures may have condominiums, a community space, or a café. [Left, Cascadia, Vancouver; right, Broadway Place, Eugene,OR]

RECOMMENDATIONS

Planning provides the framework for future decision-making and establishes the priorities and direction for the future of the Swarthmore community. The underlying purpose of the proposed planning and zoning goals and recommendations is to remove legal and financial obstacles for those who wish to remain in Swarthmore as they age. According to a 2006 paper published in the *Journal of Aging and Social Policy*, restrictive zoning regulations are the most influential barrier to creating accessible and affordable housing for the aging population.

It is important that the Borough institute planning and zoning policies to support the creation and integration of housing, land-use, and transportation systems that, in turn, support a high quality of life for people of all ages and abilities. These policies will reflect Swarthmore's future vision of its community, translate adopted Borough policies into future comprehensive planning and funding allocations, represent the needs and perspectives of Swarthmore's older residents in the decision-making process, serve as an education vehicle for all residents and for those who are responsible for implementing the policies, and foster partnerships with non-profits, adjacent municipalities, as well as promote volunteerism.

When policies are translated into implementable policies and actions, land-use and zoning tools can affect many aspects of living in Swarthmore. Planning and zoning can:

- Create more affordable opportunities to live throughout Swarthmore.

- Preserve Swarthmore's unique character while allowing development and housing changes.
- Promote intergenerational interaction in neighborhoods and the whole community, as well as allowing child and adult caregivers to reside together.
- Create a wide variety of housing options for all residents, incomes, types of families, and living arrangements.
- Allow older homeowners to downsize and remain in their community.
- Make transportation access and walking easier and more convenient.
- Generate development that is sustainable and is consistent with the current needs of those who wish to age-in-place.

Planning can look holistically at Swarthmore's policies and zoning to examine how the various components can work together to serve the goals of aging-in-place in the community. [Aerial view of Henderson Field, regional rail line, and residences, Bing Maps]

A major objective of the Task Force is to allow the construction or adaptation of a variety of housing types to fit the needs and desires of all ages of Swarthmore residents: single-family detached homes, townhomes, duplexes, apartments in accessible small buildings, condominium conversions, apartments above a garage or retail stores, etc. It is critical that all types of housing and some mixed uses be integrated into the community rather than be segregated.

Though many communities have allowed a diversity of housing types, concerns are voiced about lowering property values, parking, noise, and traffic. Well-designed zoning changes will respond to the scale and character of the neighborhood, and experience has shown no adverse impact on property values and that other fears are for the most part unfounded. Swarthmore experienced an analogous process in passing a Bed and Breakfast ordinance, transitioning from vocal resident opposition to the community viewing them as an amenity. Therefore, education will be a critical element in implementing these recommendations (see Appendix 7).

The Purcell Darrell House Bed & Breakfast at 315 North Chester Road was established after the Borough passed an ordinance permitting Bed and Breakfast by special exception in 2003.

Planning and Zoning Recommendation #20. Add new sections to the zoning and subdivision ordinances to permit new housing options in residential districts.

Because a large percentage of Swarthmore is zoned residential, the greatest opportunity to provide new housing options for those who wish to age within the community necessitates changes to the zoning and subdivision ordinances. The procedures, approvals, and fees that apply to the new ordinance provisions also can directly impact the ease of implementation by a resident. It should be very clear that the emphasis on ordinance and procedural changes is on maintaining the essential character of Swarthmore's neighborhoods and supporting the goals of the community. Three specific methods are recommended:

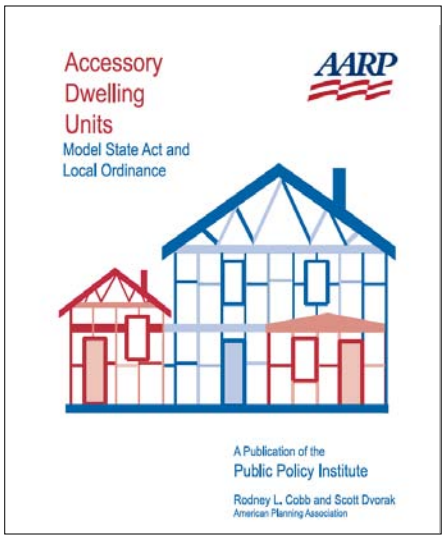
- Adding a provision for Accessory Dwelling Units to single-family zoning districts
- Allowing conversions of large-single family homes to more than 2-family residences
- Streamlining the review, approval, and permitting process.

Accessory Dwelling Units (ADUs)

As mentioned earlier, there are twenty homes that currently have a legal apartment. There are other apartments that have been created, sometimes for an older relative, but they were added without a stove so that they comply with the zoning regulations. Because a single-family home with an apartment (with or without a stove) is visually no different from others in the neighborhood, many residents in the community are unaware that they exist. Perhaps as an age-friendly college project (see Recommendation #4), an inventory can be made of single-family homes with an additional dwelling unit. With the permission of the homeowners, interviews and data could supply the Borough with more details about their use that would be valuable in the public education process. An historic house tour of homes with an apartment or those that were previously used for a business is another possibility.

4 -6 College Avenue is an example of a single-family house in Swarthmore that has an apartment in the primary structure.

Educating residents that the perceived impacts of changes to the zoning code are minimal and the benefits significant for all who live in the community is critical in an ADU ordinance planning and adoption process. Examples of informational resources include one in the series of AARP Livable Communities Fact Sheets that debunks the myths about increasing the amount of residential units allowed on a parcel of land or density.



Similarly, there are many model ADU ordinances with technical and graphic resources. Because each ADU ordinance is crafted to reflect the unique purpose and conditions of a community, a number of elements should be examined. In addition, the elements may vary according to whether the ADU is in the primary building, in an attached addition, or in an accessory building like a garage. It should be noted that allowing an apartment in an existing structure would make the use conforming.

Although dated, *Accessory Dwelling Units* provides some guidance for preparing an ADU ordinance. [AARP, 2000]

An apartment could be in a garage structure instead of a home-based business that is currently allowed in Swarthmore's residential zoning districts. [Houzz.com]

For all Accessory Dwelling Units the Borough might consider:

- Stipulating that the homeowner must live either in the accessory or principal dwelling.
- Not applying separate fees for utilities. For example, sewer use fees are currently based on water usage that directly relates to the impact on the system rather than the housing unit.
- Applying "Use by Right" in a residential zone if there are no or minimal alterations to the exterior of the existing house or accessory building (garages). A minimal acceptable alteration would be to provide an accessible secondary entry.
- Not restricting occupants to a relative, caretaker or employee of the homeowner, and allow the ADU to be leased.
- Not requiring off-street parking for the ADU, or vary any parking requirements according to lot size and/or location within the walkability zone.

For Accessory Dwelling Units in a new structure or major addition the Borough might consider:

- Establishing Form-Based design guidelines_to ensure that any new development is compatible with the scale of the neighborhood, materials and architecture of the existing house. Design guidelines would be applied as part of the building permit process for additions or new buildings that conform to the districts zoning code. They may include a separate entrance away from the house's front façade, and a requirement for a vegetated buffer where needed.
- Creating a Special Exception procedure where other housing sizes or configurations might be considered, such as two small houses on a single lot with shared green space.

Two small homes with shared green space. [The tinylife.com/tag/new-urbanism/]

Conversions

A conversion from a large single-family home to more than two dwelling units can potentially have a noticeable impact on the neighborhood. For example, an elevator may need to be constructed or if a shared home is proposed, an addition might be needed as an accessible entrance or common space. Therefore, allowing conversions of large single-family homes into three or more accessible housing units or condominiums should be a Special Exception. As with Bed & Breakfast establishments, a number of guidelines and conditions should accompany the Supplementary Regulation section. It is recommended that different conditions be applied to conversions along a transportation corridor (See Transit-Oriented Development below).

519 Walnut undergoing porch renovations in 2015. Condominium ownership was allowed because there were existing apartments when the zoning ordinance was passed in the 1970s.

Streamline the Process

To encourage an increase in housing units through creating of Accessory Dwelling Units and conversions, it is recommended that the Borough facilitate the review, approval, and permitting process. It is interesting to note that a number of municipalities that enacted ADU ordinances found that residents did not want to establish one due to the approval and cost of the permitting process. Those municipalities subsequently took a number of measures to make it easier and more affordable. Simple forms, an expedited procedure, and lower fees for a use unrelated to a residential building construction permit is recommended.

A Special Exception for an ADU or conversion will need to be heard by the Swarthmore Zoning Hearing Board (ZHB). In those cases, guidelines will be established by the ordinance. However, there might be cases where a variance is needed to alter a residence so that aging-in-place can be accommodated. Because the ZHB is an interpretive, not a legislative body, it is recommended that the Zoning Hearing Board be provided with additional guidance to be able to interpret the zoning codes intent considering granting variances on the basis of hardship. For example, deviation from setback restrictions might be viewed more favorably if an accessible first floor bathroom and bedroom addition is being constructed.

Implementation recommendations:

- Add an Accessory Dwelling Unit (ADU) section that allows a separate apartment in a single-family residential zone, but regulates the details of the implementation and use such as the form and homeowner residency. Streamline the ADU approval process with the least cost possible.
- With conditions, add provisions so that existing large single-family homes can be converted to more than two-dwelling units for condominiums or house sharing.

- Add guidance for the Zoning Hearing Board to encourage aging-in-place accommodations when considering granting variances on the basis of hardship.

Planning and Zoning Recommendation #21. Modify Swarthmore's ordinances to create more housing and mixed-use opportunities close to the Town Center.

As previously mentioned, Transit-Oriented Development (TOD) and New Urbanism seek to establish communities that link transportation, services, cultural facilities, and people without solely depending on automobiles. By easily connecting residents with the Town Center, the train station, and bus stops, a TOD provides additional affordable housing with a greater diversity for all ages. For Swarthmore, the critical areas to add diverse housing and perhaps mixed-uses fall within a half-mile walkability zone of the train station. Delineating the zone for a recommended TOD Overlay district would consider housing types, density, and street crossings rather than a simple circle emanating from the train station. The primary recommended area would encompass land areas adjacent to the major transit corridors of the train and the bus stops along Chester Road.

As such, the boundaries would include the Institutional zone parcels north of the railroad tracks east of Chester Road to Benjamin West, as well as parcels southwest along Harvard to the Strath Haven Condominiums. The apartments and townhouses located just outside of the Town Center zoning district could be added to the overlay, but it is possible that Swarthmore's housing diversity goals for some residential areas might be better served by creating a new Mixed-Residential zoning district. This possibility and a TOD overlay are consistent with the Multi-Municipal Plan that proposed an intermediate zoning district on both sides of the institutional and residential current zoning line in which smaller scale multi-family buildings are permitted. In both cases, new housing such as townhomes, cluster homes, or multi-family would be permitted, as well as large home conversions to condominiums with guidelines to ensure accessibility by using universal design principles.

A low-rise, multi-family accessible building. [Booth Hansen-Chicago Developers, Oakwood Shores Homes]

Mixed-use, energy efficient, multi-family condominiums that used Sarah Susanka's No-So-big House design principles. [StreetScape Development, School Street Homes]

The focus of the suggested TOD overlay is on housing rather than adding retail spaces. However, other mixed-uses such as community spaces, a café, or a service-related business might be suitable. It may also be desirable to allow the possibility of mixed or other uses outside of the Town Center through the Special Exception process with added guidelines. Many remember the Country Side Market fondly, but as a former nonconforming use on Yale Avenue, it could not be built today.

In addition to the zoning ordinance, revisions should be completed to the Subdivision and Land Development Ordinance. Modifications can allow mixed-use, Transit-Oriented Development, and allow reconfiguring lots for other housing options such as cottage cluster housing. Giving a density bonus might be considered if the site development includes accessible dwelling units. (See Montgomery County's Density Bonus Model Ordinance.)

Implementation recommendations:

- Delineate a new overlay zone within about a half-mile of the train station to allow new housing types such as townhomes, large home to condominium conversions, or multi-family dwellings. A new zoning district might also be considered for residential areas just outside of the Town Center.
- Support revisions to the Subdivision and Land Development Ordinance to facilitate mixed-use development close to transit, as well as reconfiguring lots to promote housing options, including cottage cluster housing.

Planning and Zoning Recommendation #22. Make all planning and zoning documents consistent with the Borough's vision and policies regarding aging-in-place.

By utilizing the recommendations of this Task Force and the Swarthmore community, further revisions of the planning and zoning codes can be made by integrating master planning, zoning, and subdivision ordinances, providing consistent and new definitions, rationalizing zoning district provisions, and implementing specific recommended changes to support Swarthmore's vision as a life-long community.

General Sections and Definitions

Similar to the Town Center Ordinance Purpose, it is suggested that language emphasize current values of walkability, preservation of community character, encouraging housing diversity, etc. Examples of existing sections include §1240.02 Statement of Community Development Objectives, §1264.11 Conditional Use Standards, and §1264.17 Special Exceptions. Other existing definitions could also be revised such as "Congregate housing for the elderly" to a "Domiciliary care housing" definition.

Cluster elder homes with porches surrounded by green space. [The tinylife.com/tag/new-urbanism/]

It is recommended that new definitions and provisions be added that reflect non-traditional housing options such as Accessory Dwelling Units. Others include cohousing, cottage clusters, congregate and shared housing. The Borough may also add the definition and provision to allow temporary housing for older adults. A temporary structure that may be called an elder cottage, "granny pods", or Practical Assisted Living Structures (PALS) is placed in back yards where space is available and removed when no longer needed (See Housing).

Residential District Zoning

Given the successful adoption of the Town Center form-based zoning, it is recommended that the approach be expanded to include residential districts to preserve their unique characteristics while allowing changes. While reviewing the Borough's residential district zoning, including the recommendations for a TOD overlay and a possible Mixed-Use residential district, it is recommended that existing residential district zoning boundaries, uses, dimensional standards, and supplementary regulations be reviewed so that the development of more affordable, accessible, and diverse housing is encouraged.

A new transition mixed-use residential district adjacent to the Town center could incorporate the Village Greens Townhouses (above), as well as those on Rutgers Avenue.

For example, as an alternative to large lot, single-family home, reducing the minimum lot size should be considered (new affordable housing lots average about 12,000 SF). Reducing lot sizes and/or increasing lot covering in the least dense areas might yield some combined districts and/or redrawn district boundaries. These measures would allow for infill, first floor bedroom additions, or accessory structures for an accessible apartment, and remove some nonconforming lot sizes.

The Master Plan

In the future, the Borough should adopt a new Swarthmore or Multi-Municipal Master Plan to ensure that the community's vision and that Task Force recommendations are consistent as required by the Municipalities Planning Code. In the meantime, the Borough should actively pursue planning discussions with adjacent municipalities that are mutually beneficial.

If possible, it is recommended that the Borough contract with a professional consultant to assist with revisions to the Zoning and Subdivision ordinances. Depending when a consultant is brought on board, a consultant would also be able to engage a variety of stakeholders to establish a transparent educational and decision-making process that will be critical to successful visioning, planning, and implementation. With the assistance of the Delaware Valley Regional Planning Commission (DVRPC) and the Delaware County Planning Department (DCPD), the Borough can seek additional funding.

Implementation recommendations:

- Revise existing zoning sections such as the Statement of Community Development Objectives and add new definitions to include a wide variety of housing types.
- Extend the Town Center Form-based design guidelines to residential districts.
- Review existing residential district zoning lot sizes, coverage standards, and other regulations to encourage the development of more affordable, accessible, and diverse housing.
- Consider hiring a professional consultant to assist the Borough in updating code sections or suggest other modifications such as redrawing district boundaries, combining or creating new zoning districts.
- Prepare a new Master Plan to ensure that Task Force recommendations and future ordinances are consistent.

APPENDICES

APPENDIX 1. Swarthmore Borough Council Aging-in-Place Task Force Resolution

APPENDIX 2. Age-Friendly Communities

APPENDIX 3. Aging-in-Place Census Report

APPENDIX 4. Public Forums

- 4.a Social Engagement Public Forum
- 4.b Transportation and Mobility Public Forum
- 4.c Housing Public Forum
- 4.d Planning and Zoning Public Forum

APPENDIX 5. Swarthmore Aging-in-Place Task Force Map

APPENDIX 6. Swarthmore Housing Affordability

APPENDIX 7. Planning and Zoning Additional Information

APPENDIX 1 Aging-in-Place Task Force Resolution

BOROUGH OF SWARTHMORE
COUNTY OF DELAWARE
COMMONWEALTH OF PENNSYLVANIA

RESOLUTION NO. 2014- 08

ESTABLISHING AN AGING-IN-PLACE TASK FORCE

WHEREAS, the Borough of Swarthmore recognizes that providing a welcoming and livable community to residents of all ages contributes to the quality of life in the Borough; and

WHEREAS, Borough Council recognizes that certain aspects of housing, transportation and the availability of services impact some of the Borough's older residents and can prevent barriers to some residents' ability to remain in Swarthmore safely, independently, and comfortably as they age; and

WHEREAS, the Borough is committed to multi-municipal planning and regional cooperation; and

WHEREAS, the Borough is committed to exploring ways in which it would be appropriate for the Borough to address the particular needs of residents of Swarthmore as they age; and

WHEREAS, the Borough has residents with knowledge and interest in issues of aging-in-place who would be willing to serve on a task force on these issues.

NOW THEREFORE, be it resolved by the Borough of Swarthmore that:

1. The Borough of Swarthmore hereby establishes an Aging-In-Place Task Force (the "Task Force").

a. The Task Force shall consist of nine members and the Mayor of Swarthmore shall be an ex-officio member of the Task Force.

b. Borough Council shall appoint the members of the Task Force, which shall include persons representing a cross-section of the community who have knowledge, experience and interest in various aspects of aging-in-place.

c. Members of the Task Force shall serve at the pleasure of Borough Council.

d. The Chair of the Planning and Zoning Committee of Borough Council and the Borough Manager shall serve as the Borough's liaisons to the Task Force.

2. The mission of the Task Force shall be to formulate recommendations to Borough Council for measures to improve the quality of life and reduce barriers faced by older residents of Swarthmore who desire to remain in the Borough as they age.

3. The Task Force, in the interest of transparency and efficiency, shall advertise its meetings, hold its meetings in public, and give an opportunity at its meetings for public comment and input.

4. The scope of the work of the Task Force shall include, but not be limited to:

a. considering public input into concerns and priorities;

b. surveying the Borough's existing infrastructure, resources, ordinances and regulations;

c. communicating with other stakeholders, interested parties and organizations, as well as neighboring communities; and

d. formulating recommendation for Council's consideration.

5. The recommendations of the Task Force may include, but need not be limited to, actions to be considered by Borough Council in the areas of:

a. establishment of community programs and services;

b. implementation or revision of ordinances, rules, and policies;

c. improvements to the built infrastructure, bearing in mind the need to be fiscally responsible and the availability of outside funding sources; and

d. creation or dissemination of information resources.

6. The Task Force shall be advisory in nature and shall not have administrative, legislative, or financial authority.

7. Nothing in this Resolution is intended to obligate the Borough or the Borough Council to take any action other than those set forth herein.

8. The Task Force shall exist for a period of one calendar year following its initial meeting. The Task Force may make recommendations to Borough Council from time to time, or may embody all of its recommendations in a final report to Council. Borough Council may extend the one year term at the request of the Task Force if additional time is needed to complete its work. Unless the term is extended by action of Council, the Task Force shall be automatically dissolved and terminated upon the anniversary of its initial meeting or on any subsequent termination date established by Council without the need for any additional action of Council.

Resolved this 14th day of October 2014.

Ralph Jacobs
President of Borough Council

APPROVED:

Timothy P. Kearney
Mayor

ATTEST:

Jane C. Billings
Borough Manager/Secretary

SWARTHMORE CENSUS DATA

February 2015

1. CENSUS AND DATA SOURCES

In the year 2000, the US Census conducted a detailed survey of Swarthmore households within a municipality. Since that time, surveys have been limited in detail or have been based on sampling. In 2010, the Decennial Census compiled data from a shorter report form. In December 2014, the American Community Survey released selected data on Swarthmore for 2009 – 2013.

Compiling meaningful Swarthmore data is somewhat difficult and complex for the layperson. Although expert assistance would help to clarify some data, the information presented some problematical areas.

- Population Data and the College. Census data for Swarthmore's total population, age and race includes Swarthmore students. While the total population and percent of poverty can be adjusted to exclude students, school enrollment, age and race cannot. Because most of the data is gathered from households, any data that mentions households will not include students.

- Data Availability, Interpretation, and Confidence. With the goal of ascertaining data trends, some detailed data breakdowns after 2000 may not be available (or maybe difficult to find), particularly for ages 65 and over. Housing data does not always reflect condominiums or multiunit buildings. In addition, the 2009-2013 sample surveys have varying margins of error.

The Older Population: 2010

2010 Census Briefs

Issued November 2011

C2010BR-09

By
Carrie A. Werner

INTRODUCTION

The older population is an important and growing segment of the United States population.[1] In fact, more people were 65 years and over in 2010 than in any previous census.[2] Between 2000 and 2010, the population 65 years and over increased at a faster rate (15.1 percent) than the total U.S population (9.7 percent). In addition to growth in the older population, pronounced growth in the male population 65 years and over occurred during the decade. The disproportionate increase in the older male population has not only contributed to the growth of the overall population 65 years and over, but has also led to a narrowing of the gap between males and females at the older ages. As larger numbers of males and females reach age 65 years and over, it becomes increasingly important to understand this population as well as the implications population aging has for various family, social, and economic aspects of society.

Figure 1.
Reproduction of the Question on Age and Date of Birth From the 2010 Census

4. What is this person's age and what is this person's date of birth?
Please report babies as age 0 when the child is less than 1 year old.
Print numbers in boxes.
Age on April 1, 2010 — Month — Day — Year of birth

Source: U.S. Census Bureau, 2010 Census questionnaire.

This report describes the older population of the United States in 2010. It is part of a series that provides an overview of the population and housing data collected from the 2010 Census. It also provides information on the age and sex structure and geographic distribution of the population 65 years and over at the national and subnational levels.[3] The data for this report are based on the *2010 Census Summary File 1*, which is among the first data products released from the 2010 Census.[4]

AGE QUESTION

Data on the age composition of the United States and your community are derived from the 2010 Census question on age and date of birth (Figure 1).

Information on age has been collected from respondents since the first census in 1790. The 2010 Census data on age were

[1] In this report, the term "older" population refers to the population 65 years and over.

[2] Although the decennial censuses collected data on age since 1790, the specific age of a person in complete years (as of last birthday) was not collected until 1850, and data on the population 65 years and over was not published until 1870. Prior to 1850, enumerators marked people as being in a particular age group. Thus, comparisons of the population 65 years and over using historical census data are made with years in which the 65 years and over population was specifically published. In 1870, the population 65 years and over accounted for an estimated percent of 3.0 percent of the total U.S. population. Source: <www.census.gov/prod/www/abs/decennial/1870.html>.

[3] This report discusses data for the 50 states and the District of Columbia as well as lower levels of geography within the states. Data for Puerto Rico are not discussed in this report.

[4] The *2010 Census Summary File 1* (SF1) contains data on age, sex, race, Hispanic origin, group quarters, relationship, tenure, and households at a variety of geographic levels down to the block level. For a complete list of the 2010 Census data products and release dates, see <www.census.gov/population/www/cen2010/glance/index.html>.

United States Census Bureau

U.S. Department of Commerce
Economics and Statistics Administration
U.S. CENSUS BUREAU

The Older Population: 2010 Report.
[2010 Cenus Brief Issued Nov. 2011]

Census and Data Sources

- U.S. Census for 2000 and 2010 Decennial Census; American Community Survey (ACS) 2000-2013 estimates. http://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml

- Delaware County Planning Department (DCPD) for 2000 and 2010 census summary tabulations. http://www.co.delaware.pa.us/planning/gisinfoservices/census.html

- Delaware Regional Planning Commission (DVRPC) for population forecasts. http://www.dvrpc.org/webmaps/PopForecast/

- Swarthmore Borough has a QuickFacts link to US Census data. http://www.swarthmorepa.org/1581/Demographics-Maps

2. SWARTHMORE GENERAL POPULATION

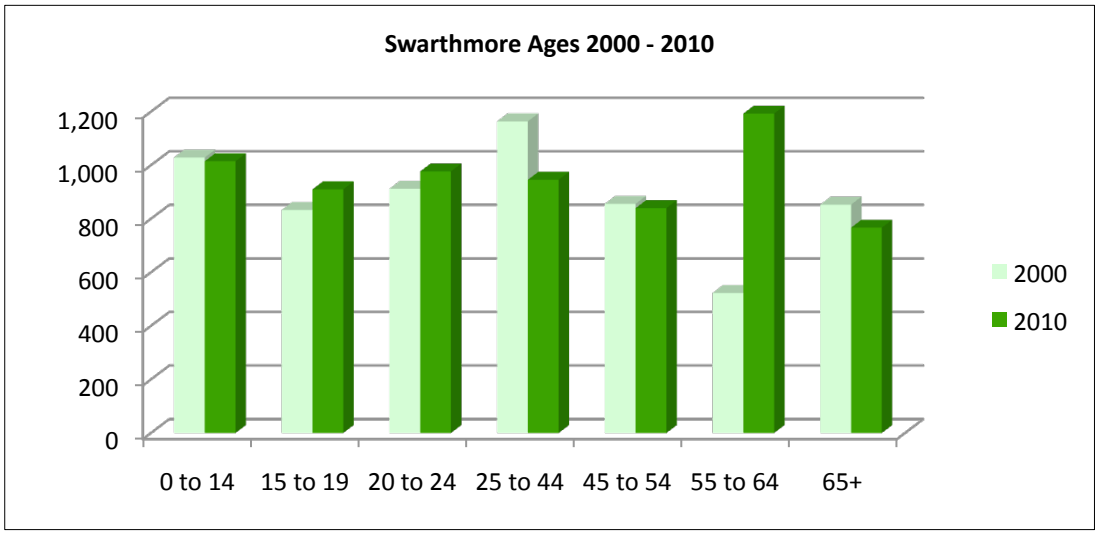
2.1 General Swarthmore Trends

Some aspects of Swarthmore are relatively constant.

- The total population that includes students is relative stable, with the 2013 population of 6,198. It is projected to grow only 1% to 6,259 in 2040.
- From 2000 to 2013, the student population (categorized as people "in group quarters" but "noninstitutionalized") increased 13% from 1,238 to 1,398, while the rest of the population decreased 3% from 4,932 to 4,800.
- Swarthmore is predominately white (83%). Black/African American remains stable at about 5% of the total population.
- It is a wealthy community. 2013 estimates list a $117,604 median household income with over 40% of families earning over $200,000. a year.
- School enrollment also reflects stability. From 2000 to 2013, preschool through high school enrollment of 1,075 decreased by 30 children while the 1,540 enrolled in college or graduate school in 2000 increased by 30 by 2013.
- Residents are highly educated. Over the last decade, over 97% of those over 25 years old have at least a high school degree.

Others seem to be slightly changing.

- Although Swarthmore only saw an increase in population of less than 25 from 2000 to 2010, the number of age 55 to 64 more than doubled. However, the number of those over 65 dropped by over 10%, with a concomitant decrease in the median age from 33.4 to 30.8.

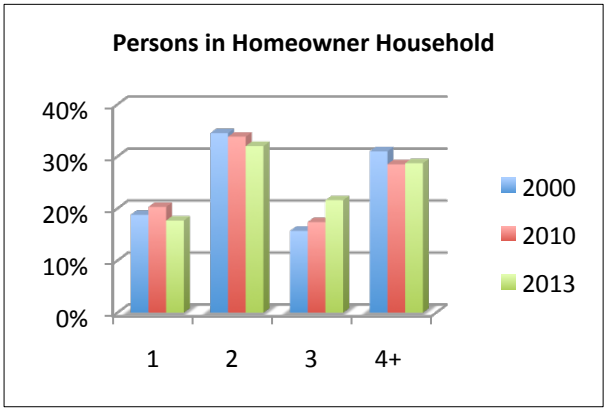


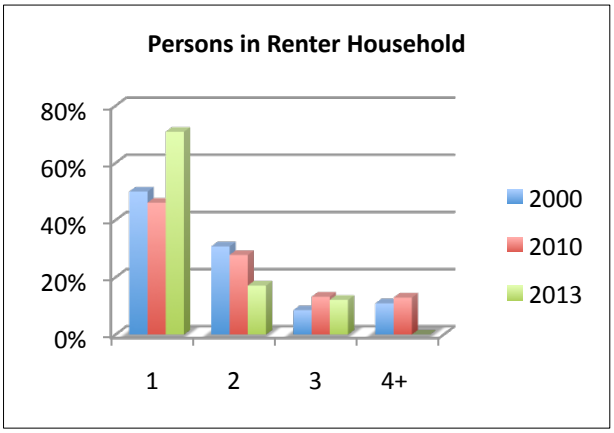
- It is becoming slightly more racially diverse. From 2000 to 2010, the number of whites fell by 3% of the population, while Hispanics grew 2%, other races/2 or more races 2%, Asians 1%.
- Residents have more graduate, doctorate, & professional degrees, increasing from 46% of those over 25 in 2000 to over 55% in 2010.
- Individuals below poverty level has grown slightly over the past decade from about 2% to 5%, with 71 households receiving food stamps or (SNAP) benefits.

2.2 Swarthmore Housing

Household Ownership and Size

- Swarthmore is a community of primarily homeowners rather than renters (73% of the total number of 2006 owner-occupied housing units in 2013).
- The greatest percentage of homeowners reside in 2-person households.
- 1 or 2-person households appear to be decreasing in number.

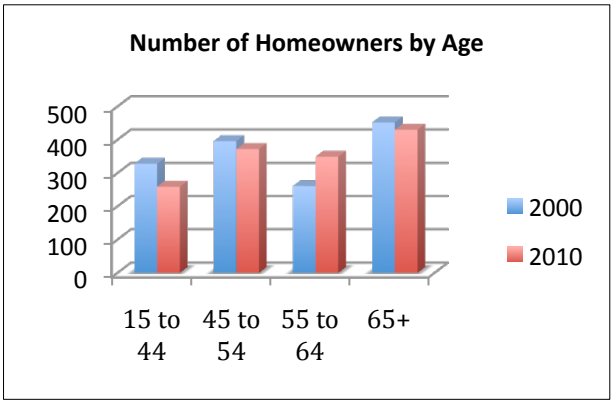


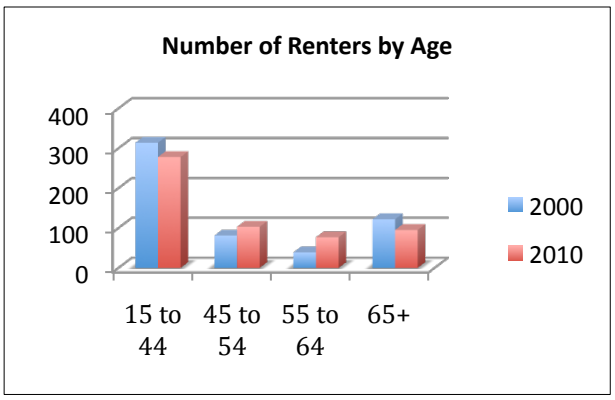


- The majority of renters live in 1-person households.
- The number of 1-person renter households has surged since 2010, while others have declined.

Householder Tenancy and Age

- Between 2000 and 2013, the total number of households of increased slightly from 1,993 to 2,006. Homeownership increased slightly by about 2%, but renters decreased by about 3%.
- From 2000 to 2010, baby boomer homeowners grew, but those over 65 decreased.
- Younger tenants predominate renters. However, all of the older age categories of renters appear to be growing in numbers.



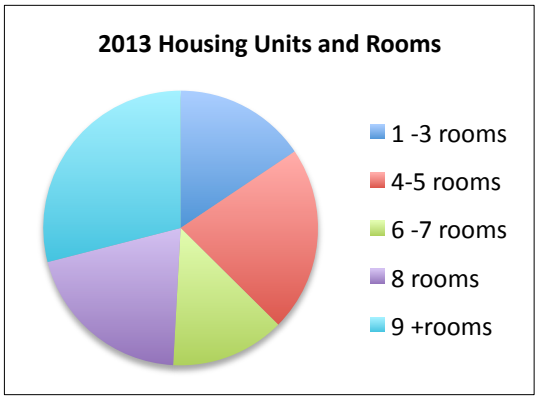


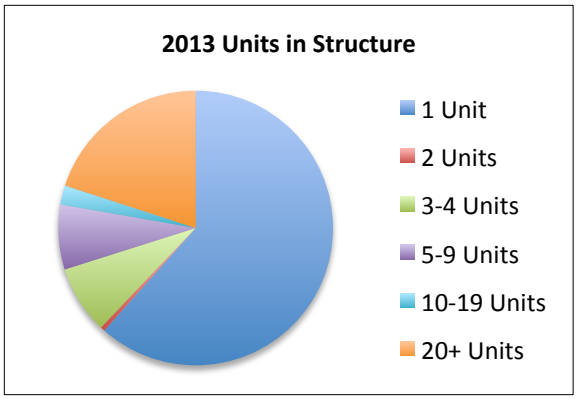
Type of Structure and Age

- A relatively small number of new units have been added since 1990, with over 75% built before 1950. A little less than 50% were built before 1939.

- In 2013, 62% of the units were 1-unit structures; 20% of the units were in 20 or more unit buildings.

- Swarthmore has some large homes, with almost 50% having 8 or more rooms.



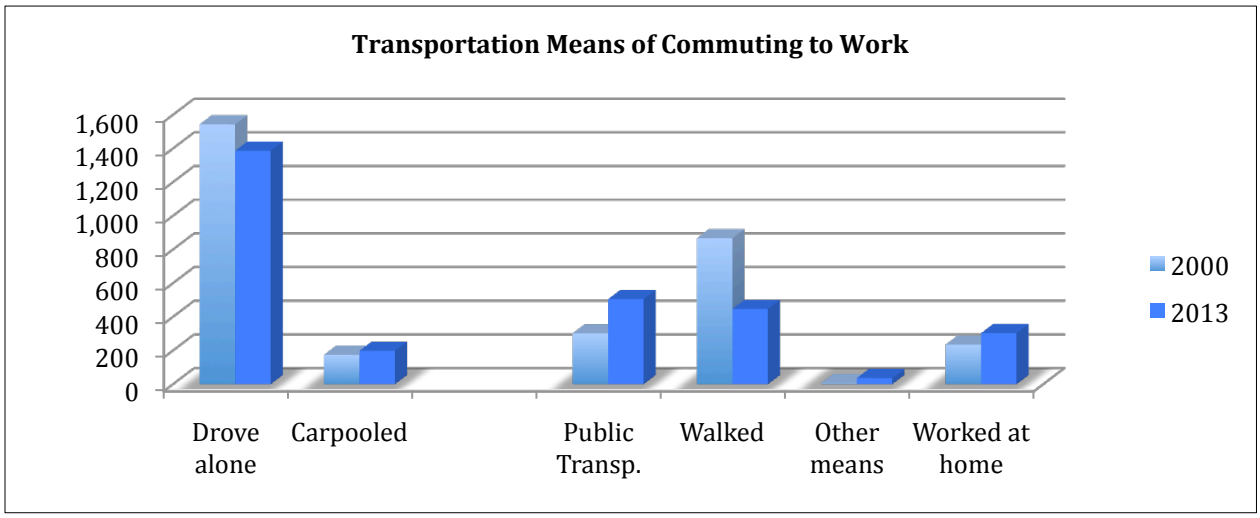


2.3 Transportation and Disability

- In 2013, 9% had no vehicles available for transportation, 40% had one vehicle, 40% had two, and 11% had three or more vehicles.

- In 2013, 50% of all workers over the age of 16 commuted by driving, a decrease from 2000 from about 60%. Workers who used public transportation increased, as did those working from home. On the other hand, walking dropped almost 50% during the same time period.

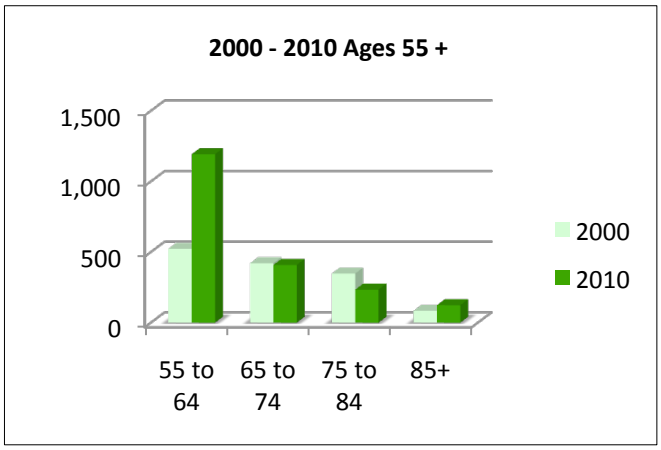
- The proportion of those with a disability increases with age. Of the 2013 estimated population, 346 have a disability (5.6%). For the 907 over 65, 158 have a disability (17.4%).



3. SWARTHMORE OVER 65

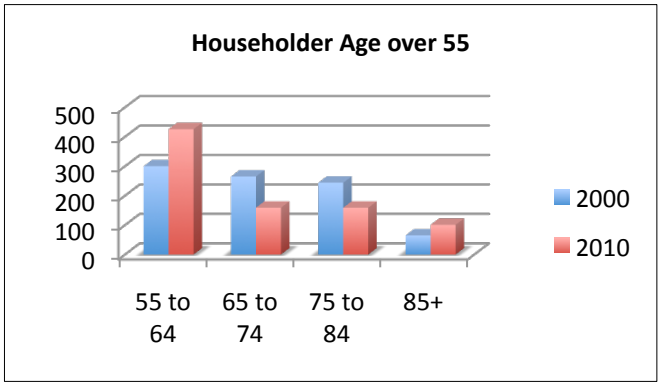
3.1 Age, Gender, and Income

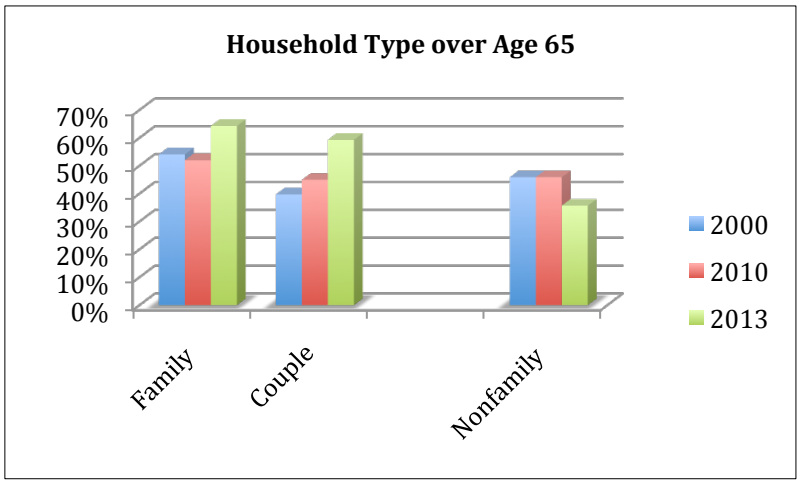
- 2010 reflected a baby boomer surge, while relative numbers of those over 65 are decreasing.
- The percent of females over the age 65 declined from 60.3% in 2000 to 57.5% in 2010.
- In 2013, of the 1,656 Swathmore households that received income, about 40% (687) drew Social Security benefits with a mean of $23,418 income. 343 also received other retirement income.



3.2 Households

- In 2013, only 17% had lived in their house for at least 25 years. Over 55% moved to Swarthmore since 2000, almost 85% after 1990.
- Between 2000 and 2010, ages 55 to 64 and 85+ ages grew; ages 65 to 84 declined.
- However, the 2013 data indicates that 644 households with individuals 65 and over increased about 13% from 2010.





- From 2000 to 2013, almost 65% live in family households with almost 60% as a couple.
- Nonfamily households (residents living alone or with unrelated people) declined from 46% to 36% between 2000 and 2013.
- In 2013, approximately 250 people over the age of 65 lived alone in Swarthmore, with less than 15 share a household.
- In 2013, 49 grandparents lived with a grandchild child. In 2010, there were 31 households with three or more generations.

APPENDIX 4.a Social Engagement Public Forum

Kerry Hogg explained the mission of the Aging-in-Place Taskforce and the Social Engagement Subcommittee. There were 6 speaker that presented, s with an opportunity for the subcommittee members and public to ask questions, following each presentation.

Greg Brown, Vice President for Finance and Administration at Swarthmore College is responsible for finance and budgeting, investments, facilities, capital projects, public safety, dining services, the book store and management of the new hotel/restaurant. He is also responsible for working closely with Swarthmore Borough to assure coordination of activities between the College and the Borough. All lectures, events, sports, etc. are free and open to the public and can be viewed on the College calendar on their website. In building the Town Center West, they are naming the bookstore, "the College and Community Store", not "the College Book Store". The College is introducing retail in a way that is helpful to the business area as they do not want to hurt existing businesses. They believe that the Inn will vitalize the business district and help get more students into town.

The College had looked at building senior housing, but decided it would not work. The College owns Morganwood, but it is not a great location.

There are many volunteering opportunities through the College, especially through the Scott Arboretum and the Chester Children's Choir (in the summer), which is part of the College.

They understand that parking on campus is an issue and have tried not to encourage cars on the campus. They are moving student parking to a new lot.

In response to a question from the audience about the store hours, Mr. Brown answered that because of the restaurant, the store will probably be open until 8:00PM. They are looking at how to staff part-time positions and will probably have a soft opening in March of 2016 with the restaurant opening in May. The restaurant will open to the public for lunch and dinner 7 days a week and for breakfast for those staying at the hotel. They hope it will become a community hub. It will be operated by a company that specializes in running college hotels and restaurants.

In response to a question about whether the vans that take students to Haverford and back could be used to shuttle people up to college events, Mr. Brown said there is concern about risk management and that the vans are not well suited for people with physical disabilities.

Mr. Brown was not familiar with the cost of the Life Long Learning Courses, when it was suggested that if the price could be more affordable, more older people from the town could benefit from the courses. The cost of the Swarthmore Discussion group is accessible and more affordable.

Mr. Brown acknowledged that accessibility on campus can be an issue, as can signage, making it difficult to find things. They have to keep the lightening at night lower so as not to interfere with the astronomy classes. They are working on a 10-year plan on pathway accessibility.

Peg Christensen, Board President of the Wallingford Swarthmore Community Classes, advised that they are celebrating their 50th anniversary this year. They offer classes two times a year—in the Spring and Fall. Classes used to be only offered in the evening at the high school, but they are now offering classes during the day, thanks to the availability of Borough Hall, Wallingford Presbyterian Church, and wine and beer classes at Hobbs. The organization has a Board of 12 members, and 2 paid employees—a registrar and administrator. The goal is to have the tuition equal the expenses. The age of the student

varies with the type of class and they try to focus on the class not the age groups. There is an evaluation form at the end of each class that also queries what other classes would the students be interested in. 85% of people register on line.

Amy McKeon, Manager of the Swarthmore Community Center has worked at the Center for 4 years. The Center was originally a gym, but in 1976 the community asked the College if they could use it for teen activities. The Center makes revenue by renting out the 1st floor for private rentals on the weekends. A number of classes are offered there and the first floor is accessible with amble parking. They offer space for community activities such as the Brownies, Lions, ABC, etc at no cost. Other classes rent on a per hour basis and charge for the class. It would be difficult to make the 2nd floor accessible. The College owns the building and takes care of exterior expenses and the Center pays for internal expenses.

Sharon Ford is the recently retired Director of the Swarthmore Library. The Library has a real role in helping Swarthmoreans age in place. It is a multigenerational hub with the biggest challenge making people aware of all that it has to offer. It is accessible and has more than books to offer, e.g., help with Medicare questions, monthly book and movie group, language discussion groups, help with taxes, help with the internet. 57 volunteer retired people help staff the library. Last year they circulated 125,000 books and 4,000 DVDs.

Nancy Davis, a library consultant and partner in the Ivy Group talked about libraries for the future, especially for seniors. Libraries used to focus on children, but are now looking more closely about how they can serve seniors, because libraries can be hugely important to their social engagement. Libraries are becoming the community living rooms, where seniors can volunteer, read magazines, use the computer, participate in clubs, etc. One of the challenges for the Swarthmore Library is the lack of physical space for new uses, so the library could share spaces by having programs in senior centers, recreation centers, schools, etc. and use the web portal.

Kim McDaniel, Director of the Senior Community Services Schoolhouse Center in Folsom described the large array of programs they have for social engagement. Their mission is to support people to stay in their homes as long as possible and to support caregivers. If people can't get to them, they bring programs to their homes. They have an Apprise Program to help with Medicare and other insurance counseling and a hearing discovery center in Yeadon . They are open 5 days a week and Thursday nights. The Center is particularly important to keep people socially engaged after they have lost a spouse. They have a Dining with Friends Program to go to different restaurants. They provide a hot meal at lunch for those 60 years and older for $2-$3. They have parties and have travel excursions. They have 100 volunteers to help deliver meals, etc. They have wood carving, art classes, water coloring, etc. Council does not help fund it although many Swarthmoreans use it.

VJ Papas of Generation on Line described their programs to improve digital literacy by providing programs in libraries, senior centers, etc. in 2,000 facilities. There are usually 3 issues for people: (1) they don't have the skills (2) they are intimidated and (3) they don't have access to a computer or the web. With Smart Phones and ipads, the cost has come down but the intimidation issue remains. They have an App on itunes for $6 that helps train seniors and address the skill and intimidation issues. Generations on Line is also available at the Swarthmore Library. To address the Access issue, Swarthmore could sponsor some hot spots and do bulk purchasing of refurbished Apple computers.

APRIL 15, 2015 FOCUS GROUP MEETING MINUTES

LOCATION: Swarthmore Borough Council Room 3:00 – 4:45 PM

PURPOSE: To learn from a panel of four speakers who will give presentations about transportation topics in Swarthmore.

SPEAKERS:	**Jane Billings**	Swarthmore Borough Manager
	Wendy E. Petkus-Mažeika	Director of Business Development, Community Transit of Delaware County
	Marie Goodwin	TimeBank Media
	Marty Spiegel	Swarthmore Town Center Coordinator
AIP COMMITTEE:	Samina Iqbal	Transportation & Mobility Subcommittee Leader
	Ann Torregrossa	AIP Chair, Transportation & Mobility Subcommittee Member
	Carol Menke	Transportation & Mobility Subcommittee Member
	Linton Stables	Transportation & Mobility Subcommittee Member
	Sue Dawes	Transportation & Mobility Subcommittee Member
	Judith Neale	Transportation & Mobility Subcommittee Member
	Elisabeth Knapp	Borough Council Liaison
RESIDENTS:	Tom Shaffer	Manager of Transportation, Delaware County Planning Dept.
	Henry Brubaker	
	Gloria Hamilton	
	Lou Rinko	
	Dee Battisti	
	Others attended, but did not speak	

INTRODUCTION

Samina welcomed all to the discussion. She briefly summarized the purpose of the Aging-in-Place Transportation and Mobility subcommittee, stating that the subcommittee seeks to further the ability of people to get to key services and activities, thereby fostering a sense of independence and engagement in the community. The subcommittee members identified themselves to the attendees.

To assist in the discussion, a map of Swarthmore and the immediate environs was described. The large colored map illustrates the location of a variety of Swarthmore and nearby features, such as community facilities, parks, schools, multi-family dwelling units, places of worship, retail buildings and the Town Center. Transportation elements are also highlighted including major roads, bus stops, the rail line, and intersections. The map, which is in digital form, will be able to be utilized and expanded upon during the Aging-in-Place Task Force analysis and recommendation process.

Samina introduced each of the four speakers before they spoke and outlined the organization they represented and their topic. Questions and comments followed after each speaker.

1. JANE BILLINGS, Swarthmore Borough [http://www.swarthmorepa.org]

Jane presented a chronological summary of the Swarthmore pedestrian and bicycle planning and implementation that has been on-going over a decade. Tom Shaffer has been instrumental throughout this process.

- 2003-2006 Master Planning.
  - The 2003 Master Plan included some transportation recommendations such as improving the Princeton Avenue pedestrian underpass.
  - The 2006 Multi-Municipal Master Plan listed pedestrian and biking recommendations for Swarthmore. [http://www.swarthmorepa.org/2186/Multi-Municipal-Comprehensive-Plan]

- 2010 Bicycle and Pedestrian Task Force Report.

  Jane noted that the task force primarily focused on children in its recommendation, but that it would be good to expand this focus to include older individuals.
  - The Task Force 2010 Report discussed a number of pedestrian and bicycle improvements. Topics included sidewalks, dangerous intersections, lowering the speed limit on Chester Road, a bike network, and the Princeton Avenue pedestrian underpass that connects to the elementary school. [http://www.swarthmorepa.org/2168/Pedestrian-and-Bicycle-Master-Plan]
  - At this point, Jane noted how important enforcement was to the community with regard to sidewalks. She said that the Borough has just hired a code enforcement officer to address pedestrian and safety issues relating to sidewalks such as vegetation and snow removal.

- 2013 Borough of Swarthmore Pedestrian and Bicycle Accessibility Master Plan.

  In 2013, Swarthmore received a grant to prepare a Bike and Pedestrian Master Plan. As with the task force, the emphasis was on children and safety. [http://www.swarthmorepa.org/DocumentCenter/View/78]

  Several priority areas were outlined:
  - Sidewalks along College Avenue, Chestnut Avenue, North Swarthmore from Walnut to Baltimore Pike, Fairview Avenue to Notre Dame, and along Cresson Lane at Cresson Park.
  - Intersections at Harvard and Yale, Chester and Harvard, and Yale and Rutgers.
  - Bike improvements such as "Sharrows" that show arrows on a road surface to indicate to a driver that the road should be shared with bikers.
  - Vehicular speed monitoring through the use of a radar sign that flashes a vehicle's MPH speed next to the posted speed limit.

- 2013+ Implementation.

  Swarthmore received grant monies to implement a number of recommendations of the Master Plan.
  - Princeton Avenue Underpass. This improved, accessible pedestrian underpass is complete.
  - Intersections. Three interesections will be improved: Yale and Rutgers, Harvard and Yale, and Chester Road and Harvard. Each may have a Rapid Rectangular Flashing Beacon (RRFB). [Note: this an flashing light that is similar to a emergency flashers that are on police vehicles that is placed a pedestrian crossings where there are no traffic signals.] Other pedestrian safety measures will include an audible countdown crossing feature and narrowing the roadway at the crossing. [Note: The Borough's enginneering consultants are currently preparing the drawings that will likely be reviewed by PennDOT's in early 2016.] Jane mentioned that the crossing on N. Swarthmore Ave to Wiedner Way was considered, but deemed not feasible due to safety issues resulting from cars having to stop on the railroad tracks.
  - Sidewalks. Sidewalks will be added along College Avenue, Chestnut Avenue and Cresson Lane at the park. The proposed sidewalk to the mall north of Walnut on N. Swarthmore proved not to be feasible because of the lack of right-of-way, as did a sidewalk extension on Fairview Avenue because of a number of complications.

Jane Billings Continued

Questions and Comments

1. Samina: *What will the pedestrian access across the roundabout be like?* There will be a refuge island for pedistrians. If needed, there is also money placed in escrow for flashing pedestrian signals. However, the use and impact on traffic flow will first need to be assessed after it is opened to traffic.
2. Samina: *Who had the responsibility for placing construction signs in the middle of sidewalks?* The construction subcontractor and/or Aqua who installed them. Swarthmore is a community of walkers who have voiced compliants about them. However, keep in mind that PennDOT has signage regulations that the contractors must comply with even though it may conflict with pedestrian use.
3. Jane: *Comment.* It would be good for the Aging-in-Place Task Force to reference specifc pedestrian improvements for the grant application process.
4. Samina: *Was lighting or seating amenties considered in the pedestrian planning process?* The Pedestrian and Bike Report recommended some lighting associated with the town center. Adding lighting needs a consultant as lighting design is complicated with several types of fixtures, one of which is illegal (mercury vapor). LED lights have been improving, but all installations need to consider shadows which have safety implications. Samina notes that adding lights may also be viewed in some cases as light pollution. Although benches have been donated to the Borough in the past, there has been no study that has included benches.
5. Henry, Tom & Samina: *Comments.* Henry said he has a great concern about pedestrian access and the roundabout. The long up and down staircases at the underpass makes the connection to either side of the railroad tracks very difficult. Tom Shaffer pointed out that SEPTA has grants that emphasize the elimination of steps, and has had recent increases the capital improvement budget. Tom offered his assistance in obtaining grant money. In response to Samina comment on the role of community surveys in gathering information that can serve the grant process, Tom said that a community survey was conducted in print and online form as part of the pedestrian and bike report.

2. WENDY E. PETKUS-MAZEIKA, Community Transit of Delaware County

Wendy presented a summary of Community Transit services in Delaware County and Swarthmore. [http://www.ctdelco.org/] She was pleased that Swarthmore was thinking about transportation planning, as she has found that many communities design programs first and then worry about how to get people there later.

- Community Transit Background.
  In 1983, each senior center had its own vehicle. Later, the Delaware County Planning Commission created the Delaware County Transportation Consortium. Now known as Community Transit, the private non-profit offers door-to-door transit services to seniors, those with special medical needs, and others unable to use public transit.

- Service Area and Operations.
  Even though a transit trip must originate in Delaware County, the vehicles may travel elsewhere such as Philadelphia. The western part of Delaware County where it is more rural, has a greater need for services because there is no public access to transit. All vehicles have lift equipment and operate Monday through Friday. Trips are coordinated with stops along a prearranged route to a particular destination. Community Transit does not provide individual trips and people need to call at least one day in advance. Each day, about 1,200 one-way trips are completed.

Wendy E. Petkus-Mažeika Continued

- Riders and Transportation Programs.
  Community Transit is not just for seniors through the Shared Ride Program. It is also utilized for those with medical needs and those on Medicaid through the Medical Assistance Program by those who are unable to use public transit. Community Transit is also a subcontractor for SEPTA's Customized Community Transportation program (CCT). This is a customized, door-to-door program that operates whenever SEPTA operates. Community Transit is an option for all ages. Wendy encourages the use of Community Transit when someone doesn't want to, or can't walk. Using the shuttle to go into Philadelphia can be a good option instead driving as driving may require garage fees and driving when dark. She would like everyone to be registered with the Senior Ride Share program prior to needing or wanting to use the services.

- Ride Share Funding and Fares.
  Although Community Transit is not a County agency, its senior ride share program is partially funded by the Pennsylvania Lottery. Fares currently range from about $3.85 to $10.85 a trip. In a worse case scenario, if someone traveled from Marcus Hook to North Philadelphia, the fare would be $11.40. More locally, if someone in Swarthmore wishes to go to Springfield, the transit driver might make stops in Ridley before arriving the desired destination. In this example, the trip would be $3.85 because it is one zone. Community Transit is currently transitioning to a dynamic schedule that uses a tablet and is based on mileage rather than zones.

  The transit fare structure is regulated by the Pennsylvania Utility Commission (PUC), with fares only representing about 15% of the total costs. Without the lottery funding, the full fare would range from $26. to $76, rather than from $3.90 to $11.40. It is expensive to run the transit program because of the expenses, such as the cost of the accessible vehicles at $60,000 each, competitive salaries and benefits for drivers, and insurance.

Questions and Comments

1. Judith: *Is there a charge to bring an aid?* Riders are allowed to bring two aids, one to assist in the transportation and one as a personal helper. SEPTA charges a flat $5. for an aid, $10. if it is out of the County.
2. Samina: *Comment & Question.* Wendy forwarded some statistics about Swathmore. Between March 2014 and February 2015, there were 132 within the 19081 zip code. 77% were medical appointments and 4% were through the medical assistance program, meaning that about 80% of the trips had a medical purpose. The other 20% were shopping or recreation related. *Are there other communities that use Community Transit to a greater extent for shopping or recreation?* No, medical is the number one reason for using the transit service. If someone wishes to go shopping, a friend or others are more easily able to provide transportation. The number two transit call is for adult day care.

   Wendy notes that there has been a substantial change in what it means to be a 65 year old today. Older individuals are much more active. In addition, seniors often can use other available means of transportation. For example, the Strath Haven Condominiums have their own van that residents can use. Wendy recommended that Aging-in-Place Task Force improve the Swarthmore website to detail the available transportaion options in the Borough. A list might include the Strath Haven vans and volunteer community organizations. Wendy also said that Haverford and Tinicum sponsors transit services. These townships only subsidize medical trips or for shopping within the town.

Wendy E. Petkus-Mažeika Continued

3. Ann: *Where are the adult day care centers located?* There are several in Delaware County. One is located at Crozer, another in Upper Darby. But probably the one in Clifton Heights is the closest to Swarthmore that is used most frequently partially due to the long hours it is open.
4. Henry: *Is dialysis part of transit use?* Yes, it is a big part of the medical use because those who need dialysis need to be transported three times a week.
5. Jane: *What is the atmosphere on a van?* The atmosphere will vary widely from a social trip or if people know each other verses travelling to a doctor's appointment. Wendy noted that the stigma of the transit van is one of the biggest obstacles of people wanting to use the service.

3. MARIE GOODWIN, TimeBank Media

Marie provided information about TimeBanking and how the system works in Media.

- TimeBanking Background.
  The concept of timebanking was created in the 1980s by Dr. Edgar Cahn, an attorney who was hospitalized and wanted to counter the feeling of uselessness. He created an alternate currency that is based on volunteer time. TimeBanking now is worldwide and has more than 1,000 organized entities. One hour of time equals one credit. Anyone can volunteer; anyone who has a need can use the credits.

- TimeBank Media. [http://timebankmedia.org/]
  Media is focused on sustainability, but includes all facets. In a peer to peer time exchange, volunteers may cook a meal, pick up kids, garden, or teach knitting. An hour is an hour regardless of how the hour is given or spent. Businesses can join as a community partner, as well as families. Later in the question period, Marie said that people can also donate their hours to a community TimeBank that could be given at the Board's discretion.

  TimeBanking is run through a separate computer software program that costs about $150. Ken Davidson, who is a Board member that also serves on the Media Borough Council, is familiar with the software. Swarthmore could start its own TimeBank as it is easy to set up and is tax-exempt.

Questions and Comments

1. Samina: *Is there a critical mass that makes TimeBanking feasible?* At least 50 people would need to join, with an maximum of about 2,000. A launch party is a good way to start. Marie also mentioned that there is an elder TimeBank in New York City.
2. Samina: *What are some of the costs such as insurance?* Volunteers have their own insurance and need to sign a waiver for the use of their car. There is also insurance for the Board that runs about 1/3 of the $12,000 budget.
3. Linton: *If, for example, someone said that they picked up trash in a park and spent x hours doing so, how do you know how many actual hours were spent?* Inaccurate reporting has not really been a problem. If someone said they did something and didn't, TimeBank would know about it. TimeBank Media is run by a committee that decides what qualifies as acceptable hours. Volunteers also get hours to run the TimeBank program.

Marie Goodwin Continued

4. Dee: *When you hire a professional who comes to your home, they are usually bonded. Is this a concern that volunteers are not bonded?* We advise that people need to do the same checking processes as they would when they hire someone and consider their qualifications. If safety in the home is a concern, we suggest that the homeowner have another person present.
5. Gloria: *How complicated is TimeBank to run?* Marie said she spends about 10-15 hours a week and also goes to conferences. There are seven TimeBank coordinators.
6. Samina: *Comment.* We see a great volunteer interest in Swarthmore that is intergenerational. Marie agrees that the intergenerational component is one of the great aspects of the program. A kid can help an older person with a computer or rake their leaves; an older person can mentor a child, babysit, or teach a language.

4. MARTY SPIEGEL, Swarthmore Town Center Coordinator

With time running short, Marty briefly spoke about two major issues for those aging-in-place: goods and services for the elderly and access to those goods and services.

- Old Buildings, Codes, and Costs

  The Town Center was primarily developed in the 1920s to 1930s and therefore has mostly old buildings that have not been adapted to modern standards such as accessibility. If, for example, a restaurant wishes to operate in Swarthmore, the building must meet all the current fire, safety, accessibility, electrical codes and regulations. For a small building, this adds significantly to the costs, and Swarthmore currently does not have the foot traffic to support those costs.

  When a new business moves into a building in Swarthmore, the need for upgrading is usually minimal. In this case, noncompliant accessibility is grandfathered and a business is not required to update the building. If there is major construction, as was the case of Aria where there was also a change in use, applicable codes must be met. The business must pay for the accessible restrooms, the upgraded electric, etc., not the building owner. Therefore, for a business to meet current standards, it can represent a substantial startup investment.

Questions and Comments

1. Henry: *Comments.* I understand that the plan for the parking lot will improve accessibility. However, there is difficulty with parking to go into Philadelphia. We need more long-term parking, and seniors need closer spots to the train station. Marty replied that they will be working on these and other parking issues.
2. Lou: *Comment.* Swarthmore is a difficult place to run a business. Swarthmore needs to be a unique place to draw people from outside. Finlandia and T. Bumbles are examples of unique businesses. However, Route 320 serves as a bypass for the Town Center. Marty responded that he is very optimistic about the future, and feels that the roundabout and Inn will serve as a catalyst. The College is also very much a full partner in the success of the Town Center.
3. Ann: *Those aging-in-place want basic needs met in town. What can be done to attract businesses to see that these needs are met?* Money would certainly help overcome the reticence of people to locate in Swarthmore. In the past, the downtown received a small grant to fix-up facades.
4. Henry: *Comment.* There may be a need for long-term remote parking for workers. 75% of the parking spots seem to be used by commuters, not by those working and patronizing the Town Center.

Marty Spiegel Continued

5. Linton: *Comment.* It seems that grouping business around a focus such as food might be a possibility verses individual store development.
6. Samina: *Comment.* The College and Town Center have clear connections, and improving those connections will be very important. The College has amazing events and is a great asset to the community.
7. Marty: *Comment.* The Town Center Board meets the second Wednesday of the month in the Community Room at 7:30 PM. The Board would be interested in resident input.
8. Ann: *Comment.* It seems as though an overall parking master plan that includes the College is needed. Access to College events is difficult because of the distance, even though it may be accessible.
9. Gloria: *Would the College be willing to have jitney services?* It could be discussed. The College is different than it was a few years ago. However, unlike the Inn, it will be difficult to bring people coming to the College elsewhere on the campus because of the number of campus facililites, the logistics of the distance, and limited time of the visitor.

WRAP-UP

Samina thanked the speakers for coming and sharing information and their insights with the Swarthmore Task Force committee and the residents. Everyone learned quite a bit about important transportation and mobility issues for those living in Swarthmore.

APPENDIX 4.c Housing Public Forum

Aging-in-Place Task Force Housing Forum
May 20, 2015

Aging-in-Place Task Force Housing Subcommittee members present included Samina Iqbal, Judith Neale, Carol Menke, and Linton Stables, chair. Also attending were Elisabeth Knapp, Borough Council Member and liaison between the Task Force and the Borough Council, and Tim Kearney, Borough Mayor and *ex officio* member of the Task Force. Mr. Stables introduced the topic and then introduced each speaker.

Lynda Lemisch, MS, OTR/L, CLCP, CAPS

Telephone 610-348-1163, Email lynlemisch19@gmail.com

Ms. Lemisch is an occupational therapist who evaluates existing living situations and makes recommendations for modifications that will make the home or workplace more amenable to a senior person or someone with disabilities.

Ms. Lemisch discussed the process for obtaining an in-home (or workplace or other location) evaluation, which starts with a doctor's referral. The occupational therapist's job is to determine the client's ability to live in the home (or other location) with a primary concern for safety and reducing the likelihood of falls. She noted, however, that even if the home is fully accommodating, everyone needs to get out of the house from time to time, to see doctors, for social engagements, to do shopping, or other errands.

Her mantra is that we should have our houses adapt to *us*, rather than we having to adapt our lives to our houses. This also applies over time, so that our houses should adapt to changes that we experience as we grow older. There are three basic types of clients she has observed:

Planners are those who think ahead, long before a need arises, and make changes to their environments as well as to their own health, that will serve them into the future.

Progressive Condition Thinkers are those who adapt as things and conditions change in their lives, reacting to situations and making changes as needed.

Traumatic Change Responders are those who react to catastrophic change, and are often left with fewer and more expensive choices.

Ms. Lemisch says that better planning reduces cost.

She recommends looking for professionals who are CAPS (Certified Aging-in-Place Specialist) certified. Therapists, contractors, architects, and others can become certified, and those who are will have a greater sensitivity to the needs of their clients as they age. The Certified Aging in Place Specialist training (CAPS) program was developed by the National Association of Home Builders (NAHB) Remodelers, NAHB Research Center, 50+ Housing Council and the AARP. Her approach in evaluating a client and their living situation is to match what the client *can* do, what the client's environment *allows* them to do, and what the client *wants* to do.

Public Comment: **Q:** Are these changes expensive? **A:** Some changes can be quite inexpensive, while others can cost quite a bit. The key is to have the evaluation made before spending the money so that an improvement or purchase can be tailored to the individual's special needs, and ideally before the need occurs, in order to avoid costly errors.

Bob Fatscher, R.L. Fatscher, Inc., General Contractor

Telephone 610-565-5108, Email rlfatscherinc@yahoo.com,1829 New London Road, Landenberg, PA, 19350

Mr. Fatscher is a residential contractor who does interior and exterior renovations.

Mr. Fatscher noted that costs of construction can vary greatly, so he is reluctant to be very specific about how much it might cost to make certain modifications to the home. He suggested that it would be wise to analyze the cost of renovations as part of weighing the benefits of staying in a home. He noted, for example, that as we grow older more of the maintenance needs to be done by outside helpers, adding to the cost of home ownership. In addition, many people as they age will use more utilities during the winter than they did previously. He noted the following factors:

Benefits of a client staying in their home

Place for family to gather

History of the family in that home

Gardening or other hobbies that the home accommodates

Costs of a client staying in their home

Expense of maintenance

Taxes

Heating costs will rise

Renovations, as needed, will get more expensive each year

Resale value of the house will depend on maintenance and on the modifications that have been made.

Issues that a client staying in their home will face

Safety, including the safety of the additional workers required to help maintain the home or to provide healthcare or other services

Healthcare at home

Access to all parts of the home

Mr. Fatscher addressed the process of hiring a contractor. He suggested that the best source for a reliable contractor is to ask neighbors for recommendations. After finding two or three, ask them for references and be sure to call them. Before interviewing contractors make a list of the things that are desired in the renovation or addition. If there are concerns about codes and permits, the client can hire an architect or go directly to the authorities having jurisdiction and ask what is possible. Contractors, according to Mr. Fatscher, do not get involved in getting approvals, and these things need to be resolved prior to starting construction.

Public Comment: **Q:** Have you had clients who had major regrets once a project is complete? **A:** No, not really. Most people know what they want prior to the start of construction, and the contractor will provide that, as long as it is within the client's budget. Some people may regret not having a large enough budget. **Q:** Knowing that the population is aging, do contractors routinely include backing for grab bars and other similar items, even though the client has not asked for them? **A:** No, because the placement of such items can vary [in a home that is not trying to comply with ADA requirements - *Ed.*] and the location of the backing can't be easily marked for a future contractor to find them. Most people don't want to pay the cost, and many people do not want grab bars before they need them. **Q:** What kind of renovations are you seeing most commonly these days? **A:** Most are bathroom renovations, for various reasons, not all of which are related to aging-in-place. People want larger master baths, and some people just want their bathrooms updated. Full additions to homes are pretty rare these days.

Christy Bobo, BSW, Director of Housing, County of Delaware Service for the Aging (COSA).
Telephone 610-499-1965, Email boboc@co.delaware.pa.us Website www.delcosa.org, 206 Eddystone Avenue - 2nd Floor, Eddystone, PA 19022

Ms. Bobo is responsible for the housing programs at the county-wide agency for providing services to seniors and to those with disabilities.

Ms. Bobo discussed the wide range of housing options and services that are available through the County, or are otherwise available on the market or through other agencies. Depending on meeting eligibility requirements, certain services related to aging in the home are available. These include assistance in making modifications to the home, housekeeping, transportation, and adult day care services. A member of the assessment unit will visit the home and review the client's medical conditions, financial conditions, and the condition of the physical environment.

Ms. Bobo then listed many of the forms of housing that are available to seniors in Delaware County. This listing is not exhaustive. *[Some notations and descriptions have been added. - Ed.]*

Congregate Housing**

Mostly independent living, with separate apartments with kitchens. There may be some organized activities and perhaps transportation provided, but there are no congregate meals or medical services. Privately-run congregate housing may charge a monthly fee, but does not normally have an entrance fee. Some privately-run congregate housing has subsidized units available. Most are built to be fully accessible.

Housing authorities*

A form of congregate housing with independent living, built and operated by a public agency for those who qualify based on financial need. There may be some organized activities and perhaps transportation provided, but there are no congregate meals or medical services. Publicly-subsidized housing usually has a waiting list, and it's important to get on the list as early as possible.

Continuing Care Retirement Communities**

A community that includes housing for independent living, assisted living, and skilled nursing. There are organized activities and usually transportation provided. Though most independent living units include full kitchens, a certain number of meals are provided and some on-site medical services are provided. There is usually an entrance fee and there is a monthly fee as well. The cost of CCRC's can be high relative to other congregate housing options.

Private housing

Independent living or in some cases, assisted living, in your own home. The home may be purchased or rented. In the latter case there may be subsidies available in the form of Section 8 vouchers. Section 8 rents are set at $700 to $760 a month or a maximum of 30% of someone's income with the Housing Authority paying the difference from the market rate. Swarthmore has two apartment buildings with subsidized units, the Greylock and Darthmouth House. Section 8 vouchers and other publicly-subsidized housing usually have a waiting list, and it's important to get on the list as early as possible. Private housing includes homes already owned by seniors, but also includes moving to a smaller home or to one of the options noted just below. Certain financial products, such as reverse mortgages, are specifically geared to assist seniors to continue living in their own homes. Another form of private housing is an accessory dwelling unit, which is an apartment built on the same property as a single family home. These are not permitted in Swarthmore, though several exist.

55+ Communities**

A form of private housing, with independent living in your own home purchased in a community that stipulates that residents be of a certain age or older (often 55 years old). These communities may be organized like a condominium, in which the responsibility for exterior maintenance and landscape maintenance falls to the association, with monthly fees to support those activities. Other amenities such as swimming pools and tennis courts may be supported by the same monthly fee.

Naturally-occurring retirement communities***

A form of private housing, with independent living in your own home purchased in a building or group of buildings that has, over time, attracted a majority of residents who are older. These communities may organize themselves to secure services such as on-site meal deliveries and medical services. Such a community might also have amenities such as swimming pools and tennis courts supported by a monthly fee.

Home sharing

Independent small group living or in some cases, assisted living, in your own home or in another person's home. The home may be purchased or rented. The other person or people may be friends, relatives, or someone with whom you have been matched by a service.

Co-housing*

A form of group living which includes independent living units, built and operated by an intentional community. There may be some organized activities and there are communal meals. Such communities are difficult to organize and maintain, as costs and chores are shared and changes to the community require consensus.

Personal care homes (board-and-care)*

Group assisted living in a facility. Meals, personal care, administration of medications, and some group activities are included. These facilities are required to have nursing staff on duty 24 hours each day, but are not as strictly licensed as an assisted living facility or skilled nursing facility.

Domiciliary care*

Group assisted living in a home-like environment. Assistance with cooking, cleaning, laundry, shopping, transportation, reminders for taking medications, coordinating medical appointments, and some group activities are included. These are usually in actual homes, accommodating up to three individuals who are 18 years or older, and who have physical or mental disability or other limitations. Homeowners are paid $978 per person hosted.

Other care**

Skilled nursing facilities, dementia care facilities, hospitals, and hospice care are not included because they are more in the realm of health care than housing. The County does offer some assistance for nursing home placement and services.

* This type of housing is not currently available in Swarthmore proper.

** This type of housing is not currently available in Swarthmore proper, but is available within a short driving radius of the town center.

*** This type of housing may be available in Swarthmore, but none have been officially designated as such.

Public Comment: **Q:** Are there any dementia care facilities in Delaware County? **A:** Yes, there are. A list will be provided.

Beth Murray, .

Email bethwmurray@gmail.com

Ms. Murray is a graduate student at the University of Pennsylvania, pursuing a Master of Environmental Studies and taking classes in City Planning at the Penn School of Design. She has completed research and a paper on the type of housing the next generation of Swarthmore seniors will be looking for.

Ms. Murray reported on the results of a survey she conducted of approximately 100 Swarthmoreans age 45 to 65. According to the latest US Census, 51% of the adults living in Swarthmore are between the ages of 45 and 65. This group will be entering retirement age in the next 2 to 22 years. The purpose of the survey was to determine whether this group has thought about where they would live once they reached retirement age, and if so, what types of housing would they be looking for. Finally, she asked whether the types of housing they were looking for is currently available in Swarthmore. The purpose of this report is to help suggest the types of housing that Swarthmore may need to develop in order to keep valuable citizens as they enter retirement age. The following is not a repetition of the data, but a listing of the general findings:

Ms. Murray noted that the population of Swarthmore is, indeed, aging in place. A comparison of census data from 1990 to 2010 indicates that the same "bubble" of residents has stayed in the community, but have moved from one age group to the next.

When asked whether they would consider down-sizing their home, over 80% indicated they would.

The factors that were most important in making the decision about a down-sized home were

1. Lower costs
2. Walkability
3. Lower maintenance
4. Wanting independence and privacy
5. Room for guests
6. Ability to lock and leave
7. Quality of design
8. No waste
9. Accessibility (i.e. first floor bedroom)

About 64% of respondents prefer to move to a small single family house (condo 27%, twin 24%, townhouse 23%, apartment 17%, Plush Mills 13%). The ideal downsize living space would have one floor, low maintenance, be charming, have light, be close to town, be easy and comfortable. A new modern residential building close to town is preferred by 70% of respondents, while 60% would move to a new townhouse close to town. Respondents generally desire to own rather than rent.

These results would lead to the conclusion that smaller forms of housing (1- and 2-bedroom homes) within a half-mile of the town center would have a ready market for those who are reaching retirement age and who want to downsize.

A further conclusion can be drawn that the large houses that would be vacated in favor of the smaller homes would then become more available to families with children, thus bolstering the economy and the school district for future generations.

Public Comment: Judith Neale made a point that people are aging in a dramatically different way than previous generations, as they are far more active and working longer years. She supported Beth's conclusion that walkability is of paramount importance to the community. Another commenter noted that the Co-op considered building apartments above the first floor of the store but the Board narrowly voted to build only the retail space.

APPENDIX 4.b Planning and Zoning Public Forum

JUNE 9, 2015 NOTES

LOCATION: Swarthmore Borough Council Room 10:00 AM

SPONSOR: **Swarthmore Aging-in-Place (AIP) Task Force**
Planning, Zoning & Community Design Subcommittee

PURPOSE: To assist the Task Force in making recommendations to Borough Council by discussing trending topics in planning that will allow more flexible housing options, ways to make our houses more affordable, and methods to promote walkability for all generations living in Swarthmore in the future.

PANELISTS:	Jane Billings	Swarthmore Borough Manager and Zoning Officer
	Justin Dula, AICP	Manager of Community Assistance, County & Regional Planning, Delaware County Planning Department
	Sam Haber, Principal Planner	Delaware County Planning Department
	Ray Ott, AICP, Principal	Ray Ott & Associates
	Nanci Sarcinello, AICP, Principal	Sarcinello Planning & GIS Services
AIP Task Force Members Present	Ann Torregrossa	Aging-in-Place Task Force Chair
	Carol A. Menke	Planning Zoning & Community Design Chair
	Samina Iqbal	Planning Zoning & Community Design Member
	Linton Stables	Housing Chair
	Judith Neale	AIP Member
Ex-Officio	Tim Kearney	Mayor
	Ralph Jacobs	Borough Council President
	Elisabeth Knapp	Borough Council Vice President, Chair of Planning, Aging-in-Place Task Force Liaison

1. WELCOME – Carol Menke

Carol Menke introduced the panelists, giving a brief background of their expertise and work. To guide the discussion, she noted previously stated goals of walkabality, affordability, and addressing intergenerational needs.

2. SWARTHMORE'S ZONING – Jane Billings

Jane Billings provided an overview of the Swarthmore Zoning code.

- Swarthmore's zoning code is based on Euclidean Zoning. In 1926, municipalities were granted the right to zone communities. Swarthmore's first zoning code was enacted shortly there after in 1928, and it incorporated mixed uses from the beginning.
- Euclidean Zoning focuses on land use types and properties and often segregates uses.

- Swarthmore's zoning code received a major update in 1972, and reflected classic zoning where dense uses are in the center of the town surrounded by residential districts. The 1972 code is also rigid in the sense that it sets specific lot dimensions, setbacks and coverage. (Refer to zoning code for details.) Until the Town Center Ordinance, there were a few minor updates such as an ordinance in 2000 to allow the construction of the college inn, and a 2005 ordinance that increased of the minimum RB Residential District lot coverage from 14% to 18% (see § 1248.03), but no major updates.
- The 2013 Town Center Ordinance implemented changes to the downtown Business - Apartment District based on a form-based code. This affects where buildings can be placed, allowing for denser multiple family dwellings, multiple uses, and increased FAR (floor-to-area ratio). The focus of form-based zoning is the aesthetics and feel of the streetscape, and it de-emphasizes separation by uses.
- With regards to allowing multiple generations to live together or senior co-housing, Jane stated that the zoning code has been perhaps unfairly maligned. For example, it is possible for up to three unrelated people to live together and any number of related people are permitted to live together in a single dwelling unit. A separate entrance is permitted. It is only a separate kitchen that is not permitted. Two dwelling units are permitted on double lots. (Refer to zoning code § 1264.08 for details.)
- Accessory Dwelling Units (ADUs) have been reviewed by the Swarthmore Planning Commission three times, but have never come to a vote. Concerns include how increased density and apartment units would affect the aesthetics and feel of the neighborhood. Also, this being a college town, there is a concern about houses filled with college students located in the middle of neighborhoods. Although in the past there has been a house rented to college students, Jane stated she received calls with questions but no complaints.
- There are quite a few residences that have apartments that are grandfathered in Swarthmore. (Note that there are 20 houses that have 2 units; 17 have 3 units; 14 have 4-10 units.) Many are inconspicuous from the street.

3. HOUSING AFFORDABILITY IN SWARTHMORE – Nanci Sarcinello, AICP

Nanci Sarcinello provided a summary of her analysis of 2013 Census estimates of affordability of housing in Swarthmore, specifically focusing on those over age 65 (see attached Housing Affordability data sheets):

- Housing mix is indicative of affordability. Swarthmore has a typical mix of housing, with 58% (1,235) of the total 2,135 housing units consisting of single-family detached housing, and 15% (316) of the units in multi-family housing of 50 units or more. Buildings of 50 units or more include the Strath Haven Condos, the Dartmouth House, and Greylock Apartments.
- Housing value is high in Swarthmore, with 27% of homes valued between $500,000 - $749,999.
- Age 65+ by Housing Type: For owner-occupied housing, 60% of 65+ resident householders live in single-family detached housing (285). 32% live in multi-family housing of 50 units or more (155). 102 householders live in renter-occupied housing, with 70% living in 2-4 unit housing (71). Nanci disclaimed that the data may be inaccurate.
- Housing is considered affordable if the annual cost is below 30% of income. Annual cost at or above 30% of income is considered not affordable. Housing costs include mortgages, real estate taxes, utilities, and insurance, but not maintenance costs. For senior household owners, 26% live in units that are unaffordable.
- Median rent in Swarthmore is $904 a month which is considered not affordable for about half of seniors.
- Banks take a look at location, and since Swarthmore is transit accessible, they give a break on the affordability equation because residents can spend less on transportation costs.

4. PLANNING AND ZONING PANEL QUESTIONS AND DISCUSSION

Carol Menke asked the panel to discuss regional trends in the Philadelphia area and in Delaware County with respect to how planning and zoning can make communities more affordable and livable for all generations.

- Ray Ott discussed how mixed uses, walkability, affordability and higher density are trends. He noted that with regards to density, the key issue is how people experience the town and the streetscape. With form-based zoning, the concern is more about what the street will look like rather than what the land uses are. Euclidean zoning emphasized the segregation of uses with little co-mingling. Separating uses now seems a bit absurd, and there is a trend for mixed-use development.
- Justin Dula concurred with Ray, noting that Philadelphia is slower to move towards national trends, as the development market is not as large as those in New York and Washington. In some ways, this has saved many communities such as Swarthmore from the 1960s [demolition and renewal], but now the region needs to catch up. Since 2008, the development community has had a chance to figure out how best to build and finance mixed use buildings to meet the demand of this type of housing rather than just focusing on single-family houses.

Carol Menke asked the panel to discuss planning tools and codes that Swarthmore may consider, such as simplifying zoning districts, expanding form-based zoning to residential district, creating density transition zones next to Town Center, using a Transit Oriented Development (TOD) Overlay Zone, and allowing Accessory Dwelling Units (ADU).

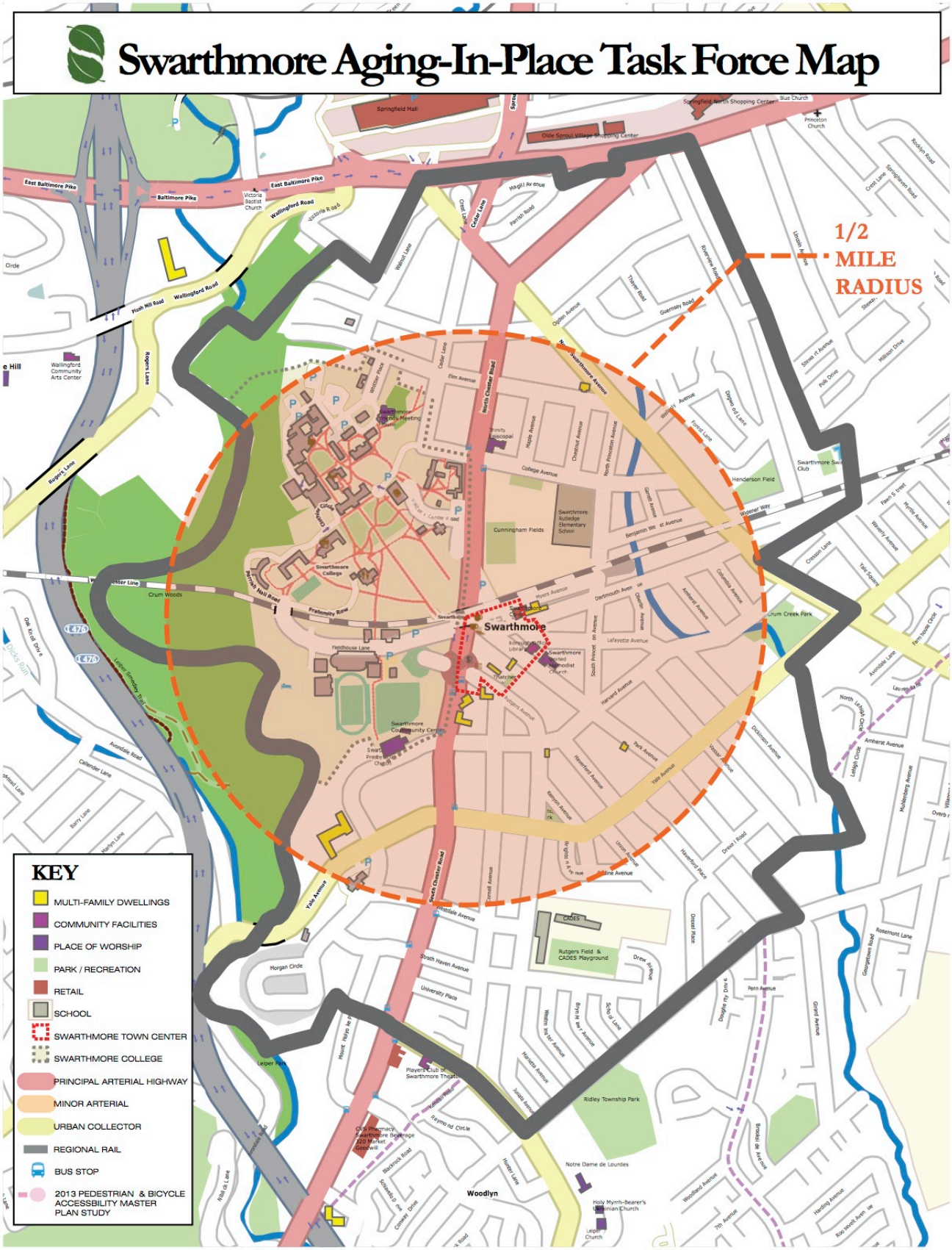
- Nanci mentioned the need for affordable housing, and the use of inclusionary zoning as a tool toward providing more. Often there is an incentive or requirement for developers to make 20% of housing units in any new development affordable to those who make 80% of the median income or less. She recommended that the panel state in its report that affordable housing is a goal for the community in and include the goal in the Comprehensive Plan. Offering an extra density incentive if affordability house is provided is another possibility.
- Justin agreed, stating that location and accessibility to transit is key. He then mentioned Accessory Dwelling Units – a second dwelling unit that is part of an existing house, attached to a house, or in a separate accessory building – that could be a mother-in-law or a caretaker apartment, for example.
- Ray discussed the recent plan for Phoenixville, PA that he worked on. It is a form-based code that implemented "infill development" zones, using the existing parameters on the block to guide what can be built. This was done as an overlay district. ADUs were permitted.
- Sam noted the concern there regarding ADUs was that once an ADU was not needed for a family-member, it would become a regular rental apartment. Temporary use permits would be difficult to implement. The point was made that density is the key to affordability, no matter who lives in the units.
- An audience member asked about the "Tiny House" trend, and if there are communities doing this here. Tiny Houses started in the West and are now moving towards the East, but there needs to be parameters for impact.
- Ray discussed the West Chester Comprehensive Plan of 2000. There are a lot of carriage houses that the new zoning permitted to be converted into ADUs. They also permitted more uses per lot (art studios, etc.)
- Fairfax County, Virginia also permits ADUs.
- Nanci noted that there is a concern that young professionals are leaving the area because there are too few affordable living options. She noted that young professionals are leaving PA as a whole. Young professionals may have student debt, get married later than in previous generations, and do not have a

need for large multi-bedroom houses. Ray concurred, stating that in many ways the over 65 have much in common with the millennials.

- Nanci discussed the plan she worked on for North Coventry Township, in north Chester County. There was a historic overlay. Accessory dwelling units were regulated with regards to set backs, size in relation to the primary structure, the number of people living there.
- Ray expanded on how the concept of in-fill development works in Phoenixville. Parameters that are set by measuring existing widths, setbacks and lot sizes within a block determines how you can develop a property. The key idea is that new development must fit into the community. He also noted that this zoning approach also serves the review of accessory uses of garages.
- There was discussion of perhaps allowing ADUs, but only in certain areas. Later in the discussion, Council President Ralph Jacobs noted that this may not be equitable.
- Henry Brubaker, member of the public, discussed how there has been a diversion of small businesses. He noted small "mom-and-pop" corner shops that were on lots with non-conforming uses that are no longer there, such as the one that was on Yale Avenue (Countryside Market until Christmas 2011). Jane Billings noted that non-conforming uses are challenging because the use can morph into something that becomes too burdensome for a residential neighborhood.
- A member of the public asked how storm water management would be addressed if additional buildings were allowed. Jane Billings responded that the Storm Water Management ordinance already in place is very strict and requires a plan for onsite rainwater capture if impervious surfaces are increased beyond 500 sq. ft. (See ordinance). Ray noted that some municipalities are treating municipal storm water collection as a utility fee as it generates an impact that a city must pay for, and not a tax (West Chester and Radnor).
- Council President Ralph Jacobs asked the panel for practical approaches for our borough:
  - For Accessory Dwelling Units, should there be a requirement for related occupant or can the unit be rented to anyone?
  - Should an ADU be permitted anywhere in the borough or should it be location specific?
  - Are there examples of communities that have allowed ADUs, and what has been the impact of ADUs been on the fabric of the communities that have permitted them?
- Nanci noted that in North Coventry Township, PA, Portland, OR, and Spokane, WA, there were regulations to insure that one of the units was owner-occupied. (Later in the conversation Charlestown, SC was also mentioned.) Linton added that some would want income. Justin Dula said that if ADUs were just limited to family members, it would not be possible to have caretakers in the unit.
- Sam noted that other communities have regulations to limit use of ADUs.
- Jane noted that the 2006 Comprehensive Plan goals were to continue to provide a diverse housing stock, while supporting senior housing needs through new housing and help with maintenance.
- The Mayor stated that change comes slowly, but the community is progressing. He discussed the perceived problems of change - impact on the community, parking and traffic. Stating that it all comes down to impact, he cited an example in Swarthmore that allows a low impact home office, rather than the Pennsylvania's no impact home-based business laws. He then expanded on the cycle of the town with younger families moving in and older ones moving out.
- Justin discussed universal design - design for everyone. In PA, municipalities cannot revise the building code so the accessibility requirements built into the code are fully enforceable in Swarthmore. The Borough, however, is not permitted to go beyond the building code, but might implement for accessibility through the zoning code.
- Justin noted that 55+ housing is not really affordable, and doesn't see this type of housing possible in fully developed town like Swarthmore.
- A person in the audience asked if anyone has tried co-housing? West Marlboro Township has co-housing. In Swarthmore, it could be done with conversions of large homes or small apartment buildings.
- Justin noted that Swarthmore does have a wider variety of housing than most small communities.

- With regards to ADUs, an audience member restated the concern about who would live in accessory units after family members leave.
- Ann Torregrossa noted that the lack of affordability will be a big issue for the future of the community.
- Jane noted that there are some very affordable rental units.
- Beth Murray noted that Swarthmore is not completely built out; in fact, it is under-built.
- Jane noted that sometimes the results of proposed changes are not as great as some people expected; for example, there was a lot of concern about B&B's but only three have opened.
- The Mayor noted that there is the political will to do something about these issues.
- Ray recommended to the approach the issue from a preservation point of view, i.e. how to keep beautiful homes, how to make them more affordable. He recommended allowing ADUs.
- Nanci noted that with larger homes, when owners move out, younger families might not want to buy those homes.
- Justin Dula mentioned the concept of a land value tax, where the value of the land is taxed rather than just the improvements, as a way to encourage building investment. However, this technique has mostly been used by distressed communities such as Pittsburgh and Millbourne.
- Judith Neale said that there needs to be better education among seniors and the disabled about co-housing options.
- Nanci noted that millennials need to come on board too, as they are often looking for the same types of housing options as seniors.

APPENDIX 5

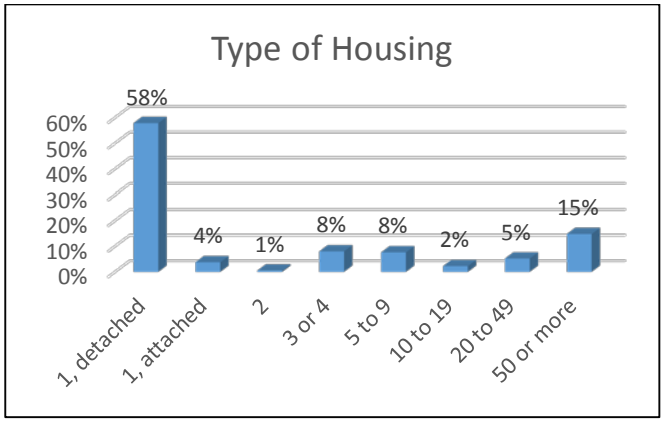

Swarthmore Aging-In-Place Task Force Map
1/2 MILE RADIUS
KEY
MULTI-FAMILY DWELLINGS
COMMUNITY FACILITIES
PLACE OF WORSHIP
PARK / RECREATION
RETAIL
SCHOOL
SWARTHMORE TOWN CENTER
SWARTHMORE COLLEGE
PRINCIPAL ARTERIAL HIGHWAY
MINOR ARTERIAL
URBAN COLLECTOR
REGIONAL RAIL
BUS STOP
2013 PEDESTRIAN & BICYCLE ACCESSBILITY MASTER PLAN STUDY
Swarthmore
Woodlyn
Springfield Mall
East Baltimore Pike
Baltimore Pike
Wallingford Road
North Chester Road
South Chester Road
College Avenue
Cunningham Fields
Henderson Field
Swarthmore College
Crum Woods
Crum Creek Park
Rutgers Field & CADES Playground
Ridley Township Park
Leiper Park
Morgan Circle
Wallingford Community Arts Center
Swarthmore Community Center
Swarthmore Presbyterian Church
Swarthmore Friends Meeting House
Swarthmore Public Library
Swarthmore United Methodist Church
Swarthmore Rutledge Elementary School
Players Club of Swarthmore Theatre
Notre Dame de Lourdes
Holy Myrrh-Bearer's Ukrainian Church
Leiper Church
Princeton Church
Swarthmore Swim Club
Springfield North Shopping Center
Olde Sproul Village Shopping Center
Blue Church
Victoria Baptist Church
Swarthmore Episcopal
Rogers Lane
Plush Mill Road
Parrish Hill Road
Fraternity Row
Yale Avenue
Harvard Avenue
Dartmouth Avenue
Princeton Avenue
Cedar Lane
Elm Avenue
Walnut Lane
Haverford Avenue
Amherst Avenue
Rosemont Lane
Penn Avenue
Drexel Road
Dickinson Avenue
Strath Haven Avenue
University Place
Blackrock Road
Notre Dame Road
Woodland Avenue
Broadway Avenue
Garrett Avenue
Georgetown Road
Huntingdon Avenue
Springfield Road
Rockrim Road
Lincoln Avenue
Cresson Lane
Yale Square
Terrace Circle
Avondale Lane
Laurel Hill Circle
Leiper Circle
Avondale Road
Calender Lane
Barry Lane
Melvin Lane
Oak Knoll Drive
Dicks Run
Hillside Lane
Hillside Road
Fairview Road
Fairfield Place
Drew Avenue
Doughty Run Drive
Myrtle Avenue
Waverly Avenue
Fairfax Road
Hillsdale Drive
Pulk Drive
Stoney Avenue
Stoney Lane
Glenmary Road
Thayer Road
Ridgeway Road
Orchard Lane
Dogwood Lane
Ashland Avenue
Columbia Avenue
Lafayette Avenue
Benjamin Rush Avenue
Gamble Avenue
Chestnut Avenue
North Princeton Avenue
Haverford Avenue
Rutgers Avenue
Kenyon Avenue
Yale Avenue
Linden Avenue
Cornell Avenue
Fieldhouse Lane
Whittier Place
Whittier Way
Cedar Lane
Hagill Avenue
Parrish Road
Circle

Housing Affordability

All data are 2013 Census estimates

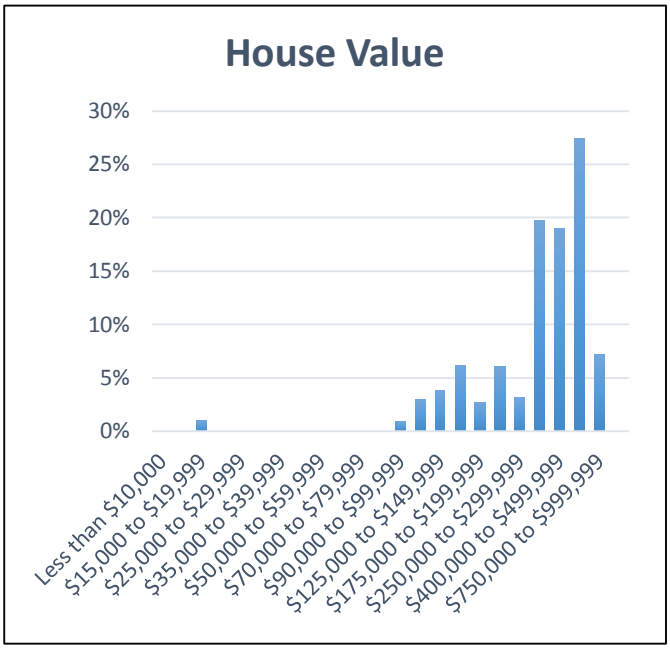
Housing Mix

Type of Housing	Swarthmore Borough	
	Estimate	
Total:	2,135	
1, detached	1,235	58%
1, attached	80	4%
2	11	1%
3 or 4	171	8%
5 to 9	163	8%
10 to 19	48	2%
20 to 49	111	5%
50 or more	316	15%
Mobile home	0	0%
Boat, RV, van, etc.	0	0%



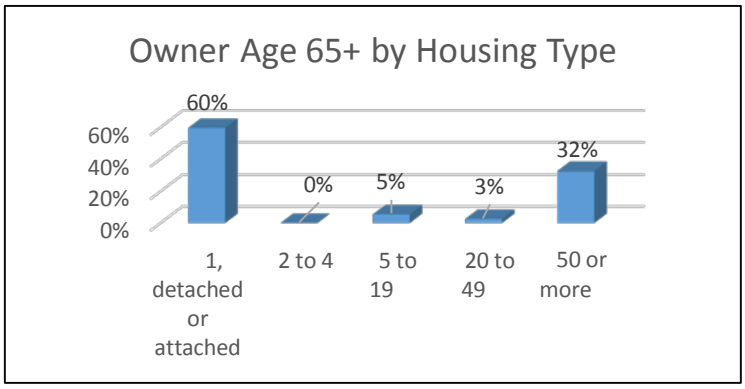
House Value

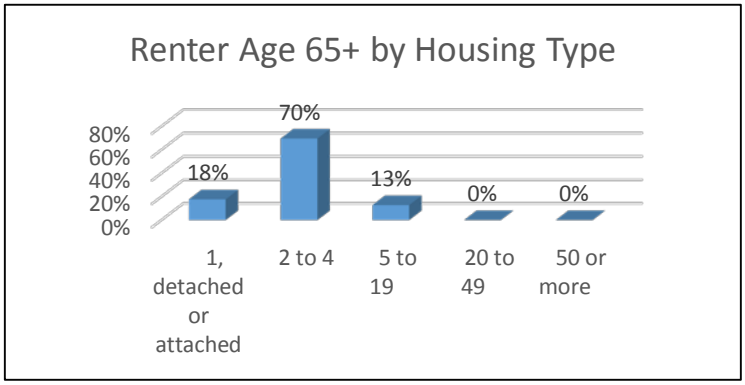
House Value	Swarthmore Borough	
	Estimate	
Total:	1,467	
Less than $10,000	0	0%
$10,000 to $14,999	0	0%
$15,000 to $19,999	15	1%
$20,000 to $24,999	0	0%
$25,000 to $29,999	0	0%
$30,000 to $34,999	0	0%
$35,000 to $39,999	0	0%
$40,000 to $49,999	0	0%
$50,000 to $59,999	0	0%
$60,000 to $69,999	0	0%
$70,000 to $79,999	0	0%
$80,000 to $89,999	0	0%
$90,000 to $99,999	14	1%
$100,000 to $124,999	44	3%
$125,000 to $149,999	56	4%
$150,000 to $174,999	90	6%
$175,000 to $199,999	39	3%
$200,000 to $249,999	89	6%
$250,000 to $299,999	46	3%
$300,000 to $399,999	289	20%
$400,000 to $499,999	278	19%
$500,000 to $749,999	402	27%
$750,000 to $999,999	105	7%
$1,000,000 or more	0	0%



Age 65+ by Housing Type

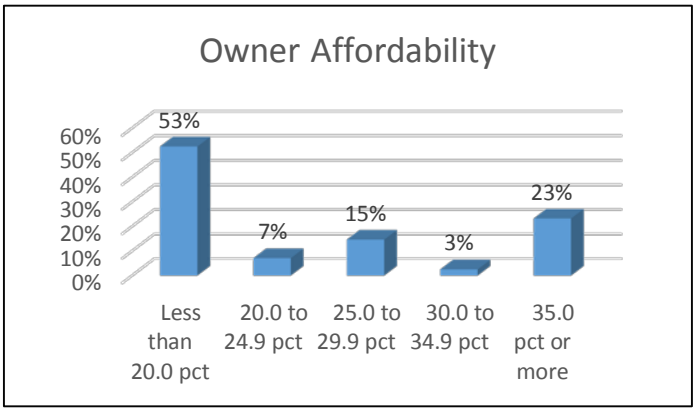
Age 65+ by Type of Structure	Swarthmore Borough	
	Estimate	
Owner occupied:		
Householder 65 years and	478	
1, detached or attached	285	60%
2 to 4	0	0%
5 to 19	26	5%
20 to 49	12	3%
50 or more	155	32%
Mobile home, boat, RV,	0	0%
Renter occupied:		
Householder 65 years and	102	
1, detached or attached	18	18%
2 to 4	71	70%
5 to 19	13	13%
20 to 49	0	0%
50 or more	0	0%
Mobile home, boat, RV,	0	0%





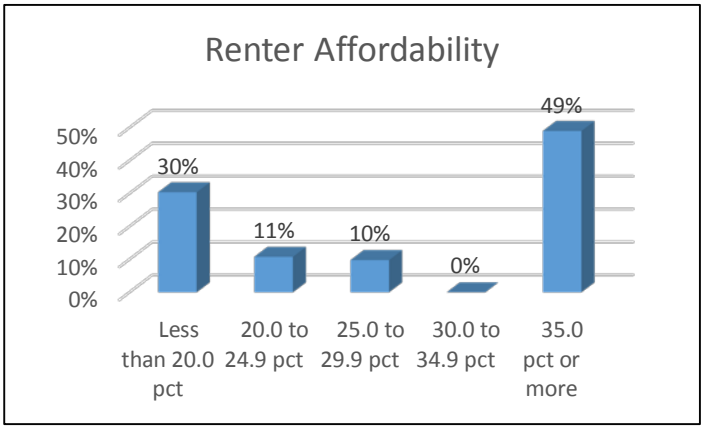
Age 65+ Owner Affordability

Owner Affordability	Swarthmore Borough	
	Estimate	
Householder 65 years and	478	
Less than 20.0 pct	251	53%
20.0 to 24.9 pct	34	7%
25.0 to 29.9 pct	70	15%
30.0 to 34.9 pct	12	3%
35.0 pct or more	111	23%



Age 65+ Renter Affordability

Renter Affordability	Swarthmore Borough	
	Estimate	
Householder 65 years and	102	
Less than 20.0 pct	31	30%
20.0 to 24.9 pct	11	11%
25.0 to 29.9 pct	10	10%
30.0 to 34.9 pct	0	0%
35.0 pct or more	50	49%



APPENDIX 7 Planning and Zoning Information

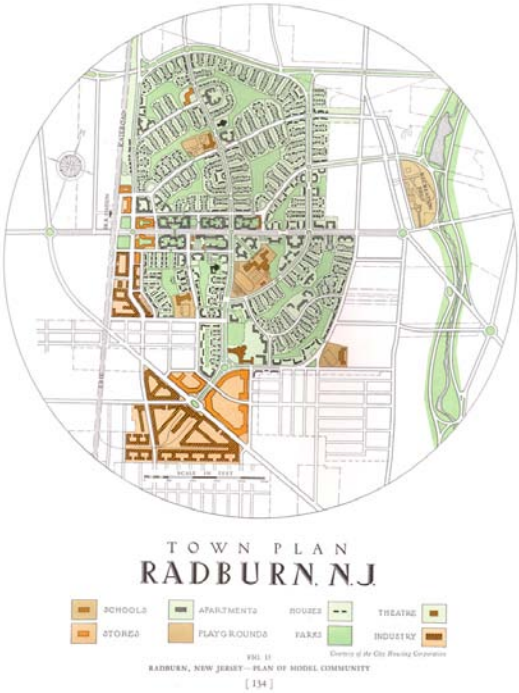
BACKGROUND

Planning and Zoning in the Last Century

With rampant growth of industry at the turn of the 19th century, cities and towns saw noise, pollution, and incompatible activities expand into their neighborhoods. Concerned that industry would change the character of their village, Euclid, Ohio enacted a zoning ordinance restricting the expansion of a proposed industrial development. The developer charged that by limiting the use of the land, the town had devalued the land and sued Euclid. The resulting *Village of Euclid v Ambler Realty Co.* 1926 landmark case confirmed the right of municipalities to limit personal property rights to promote the health, safety and welfare of a community. This early zoning decision not only set a precedent for municipalities to legally separate uses and regulate building heights by zones, it allowed the implementation of zoning ordinances to spread throughout the country and become commonplace.

Although there was an established tradition in towns of mixed uses where an apartment could be located above a store or a corner, the practice of completely separating allowed uses became the standard zoning scenario in the 20th century. As uses and ownerships changed, a use or building that did not conform to the zoning ordinance disappeared. Coupled with new development that did conform, large land areas became devoted to the single-family only housing that we see today.

With the decades-long traditional view that the separation of uses protects property values and preserves neighborhoods, changing the approach to planning and zoning was unusual in the first half of the 20th Century. Rather than focusing on the regulations of an existing town, a few innovative thinkers sought to create a totally new community. With the construction of Radburn, New Jersey in 1928, the idea of being able to plan an integrated community that encompassed a village, with residences, mixed-uses, and green spaces connected by paths reached fruition. Inspired by Howard's Garden City concept, Radburn was the precursor the New Deal's Green belt towns of the 1930s.



Designed by Stein and Wright as a new community that emphasized social cooperation, Radburn was the first town to feature cluster housing with separated pedestrian paths that enabled residents to safely walk to destinations within the town without using an automobile.

Contrary to earlier prototypical examples of planned towns that incorporated green spaces and town centers, two federal acts proved to have significant impacts on how towns were developed in the second half of the 20th Century. One was the Housing Act of 1949 that provided funding to acquire properties that were considered slums. The resulting "urban renewal" expanded into cities with immense demolition and rebuilding projects often with large civic structures, spaces, parking garages, or public housing. Locally in Philadelphia, Independence Mall was created in 1956 through the demolition of blocks of existing 18th-20th century buildings, not far from the Society Hill that was considered a slum at the time.

The second federal act was Federal-Aid Highway Act of 1956. Its passage not only accelerated the demolition of existing neighborhoods, but also encouraged building residential communities further away from urban centers. With the creation of the interstate highway system and a new network of connecting roads, communities became ever increasingly tied to automobile network. Suburbia especially saw the explosion of isolated residential developments without sidewalks totally dependent on vehicles for everything.

In the 1960s, planners reacted to the neighborhood destruction through the renewal and highway programs by constructing a few new planned communities. Founded in 1964, Reston, Virginia was the first to promote an integrated, mixed-use Town Center with parks and paths. In 1967, Columbia, Maryland emphasized neighborhoods and mixed incomes; it now has nine distinct villages located within a half mile walking distance of the downtown.

Reston Town Center today. [Reston Town Center Blog, June 24, 2011]

During the same time period, other planners and citizens fought wholesale demolition when they joined the historic preservation movement to preserve neighborhoods and villages through rehabilitating existing structures and the establishment of historic districts. The 1966 Historic Preservation Act and the Transportation Act provided additional protection to historic and natural resources.

Being familiar with the origins of planning and zoning is important for Swarthmore residents and business owners because it provides an understanding of Swarthmore's current zoning that maintains the separation of uses outside of the Town Center and continues the dependence on a car for transportation. Many of desires that can be heard in Swarthmore today that include walking and living near the center of town, have their roots in 19th Century village life where uses were mixed and social interaction was easy. 20th Century town planners sought to replicate these characteristics in new communities. Later, they fought to counteract the isolation brought by the highway system and the destruction of existing buildings through preservation.

Many of the current trends in planning and zoning that we see today in the profession and are described later, reflect some of the values that have been in existence for decades. While the foundation is not new, the planning terms and zoning mechanisms are not commonly known to most. Consequently, when future changes to the status quo are proposed, it is helpful to remember the past.

Planning and Zoning Terms

Because planning and zoning often use special terms that have legal implications, it is useful to be familiar with a few definitions that are pertinent to aging-in-place. The ones listed below are used in general planning or currently listed in Swarthmore §1240.05 Definitions with enactment dates and quotation marks. Other current planning and zoning terms are included later in Current Trends and Best Practices.

- Accessory Building (2005) "is a subordinate building located on the same lot as the principal building, the use of which is incidental and accessory to that of the principal building." A garage is an example.

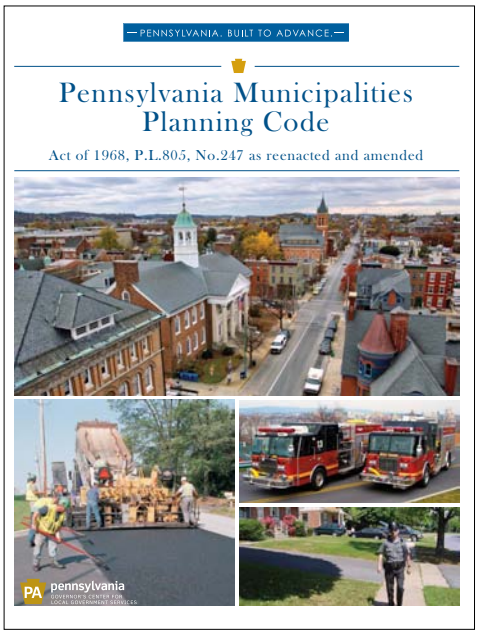
A garage is an accessory building that may have a home-based business as an accessory use. [Houzz.com.]

- Accessory Use (1976) "means a use subordinate to the principal use of the land or of a building on the same lot and customarily incidental thereto." A home office is an example.
- Conditional Use (1976) "means a use which may not be appropriate to a particular zoning district as a whole, but which may be suitable in certain localities within the district when specific conditions prescribed for such cases within this Zoning Code are present. Conditional uses are allowed or denied by Council after recommendation by the Planning Commission." Demolishing a building in the Town Center would require a Conditional Use.
- Conforming and Non-conforming Uses, Lots, and Building. A current use that is allowed in the zoning, a lot that has the minimum size, or a building that meets the zoning regulations such as setbacks, height or lot coverage is conforming. If the use, lot or building does not comply with the code, it is non-conforming. Usually, nonconforming components were preexisting to the zoning code regulations.
- Congregate Housing for the Elderly (1998) "means a structure containing two or more dwelling units and rooming units limited in occupancy and occupied by persons sixty-two years old and older, their spouses or surviving spouses, except for rooms or units occupied by resident staff personal, providing indoor, conveniently located, shared food preparation service and major dining areas, and common recreation, social and service facilities for the exclusive use of all residents."
- Conversion (1976) "means the change of an existing single-family detached dwelling into a lawful two-family detached dwelling, on the same lot, and without subdivision or the introduction of a new owner." Conversion would require a Special Exception (see below)
- Family (1976) "means:
  (a) A single person occupying a dwelling unit;
  (b) Two or more persons related by blood or marriage occupying a dwelling unit, plus not more than two boarders, two roomers or two lodgers; or
  (c) Not more than three unrelated persons occupying a dwelling unit, living together."
- Overlay Zoning District. An overlay zone is a zoning district which is applied over one or more previously established zoning districts, creating supplementary standards or criteria for properties in addition to those of the underlying district. The College Inn is located within an overlay zoning district.
- Use by Right and Special Exception. In each zoning district, certain uses are permitted by right. Other uses or an expansion of a nonconforming building can be allowed after review and approval of the Zoning Hearing Board. A bed and breakfast is an example of use that would require a Special Exception.
- Variances. As outlined by the Municipal Planning Code, a building permit applicant can request permission from the Zoning Hearing Board to deviate from the set of land use regulations if in the opinion of the applicant, applying the regulations would cause undue hardship.

EXISTING SWARTHMORE PLANNING AND ZONING

Planning and Zoning

Planning and zoning in Swarthmore consists of comprehensive planning, zoning and subdivision ordinances and other regulations. All zoning and comprehensive planning in Swarthmore is authorized by the enabling act of the Pennsylvania Municipalities Planning Code (MPC). A summary of Swarthmore's comprehensive plan was provided in planning and zoning recommendations, while other building codes and Borough regulations are addressed in the health, housing, and transportation sections. This appendix section is a summary of Swarthmore's zoning code and a few relevant regulations.



MPC, enacted in 1968 as revised 2015.

Swarthmore Zoning Code

Beginning with Ordinance 1 in 1893 that created the Swarthmore Borough seal, a series of ordinances have been enacted to regulate a broad range of municipal concerns. Ordinances in the 1920s to 1950s dealt with signage, dumping, sewers, general offenses, use of streets, etc. The first ordinance relating to planning and zoning led to the establishment of the Planning Commission in 1956. In 1974, the Subdivision Regulations were enacted. In 1976, Swarthmore's first zoning code that outlined zones uses, districts, and regulations was codified and adopted. Since that time, over 200 municipal ordinances have been passed and repealed, almost 40 of which fell under the planning and zoning topics.

Since 1976, there have been a few changes to residential districts in the Zoning Code. In 2005, partially in response to the number of variance requests based on nonconforming lots, the lot coverage restriction in the RB residential district was increased from 15% to 18%. In 2006, an ordinance was passed to allow a home-based business in an accessory building (i.e. a garage) if the structure was conforming. If it is nonconforming, a Special Exception is required.

Swarthmore's current zoning districts currently includes five residential districts, an institutional zone, parks, and a Town Center. The zoning map, which has not been updated since 1976, generally reflects the uses and lot sizes as the Borough existed in the 1970s.

Residential Districts

There are three Residential Districts, an Apartment District, and an Alternate Residential District. Generally, the less restrictive zone allows all of the uses of a more restrictive zone while adding others. Each district has corresponding less restrictions for lot size, building coverage and yard setbacks. Even though all of the RA, RB, and RC Residential

districts allow a two-family detached dwelling to be built by right, it does not allow a conversion of an existing single-family to a two-family dwelling without a Special Exception.

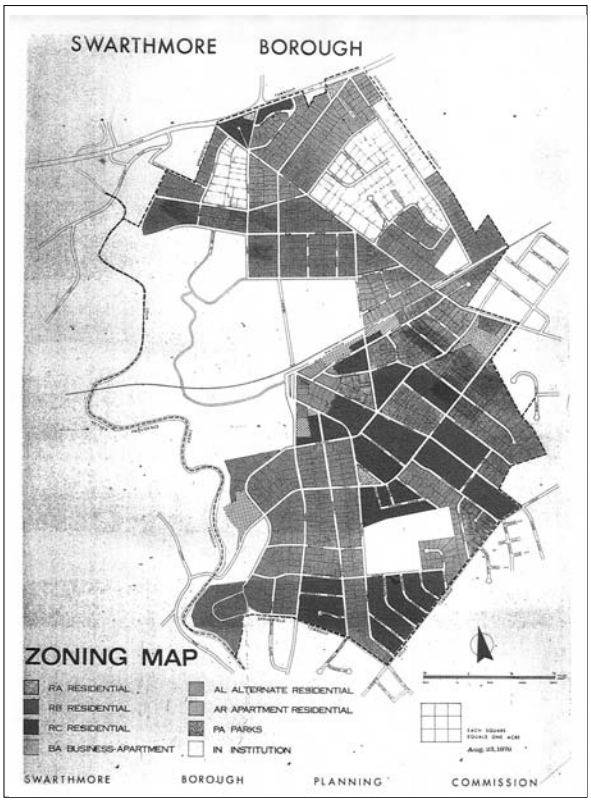
- RA Residential. Located in two areas in the north section of the Borough and consisting primarily of single-family houses, RA requires the largest lot size, 20,000 SF and the smallest lot coverage of 12%.

- RB Residential. Perhaps the most common district, RB stipulates a 14,000 SF lot, a 18% lot coverage, as well as allowing semi-detached houses (twins) to be built by right.

- RC Residential. RC permits the same types of houses as RB, but allows an 8,000 SF lot and a 20% lot coverage,.

- Apartment Residential. The 1976 map essentially created a separate zone for Strath Haven Condominiums, the Greylock and Dartmouth House Apartment properties.

- Alternate Residential. Although this zone permits all types of family dwelling units, this district only encompasses two areas: the Village Greens townhouses and the ones at 100 Rutgers Avenue.



Swarthmore Zoning Map, August 23, 1976.

Throughout the residential districts, there are several nonconforming residences that existed when the zoning code was enacted in 1976. There are currently 20 residential parcels that are considered two-family residences, and about 30 that have anywhere from 3 to 10 residential units. From a Borough list of "Small Apartments" in 1974, it is interesting to note that many of the 2 or more dwelling unit houses that existed then are now conforming, either through conversion to single-family or demolition. Because the residential buildings that have an apartment in them appear as single-family residences, many people in Swarthmore are unaware that there are apartments throughout the borough.

Parks, Institutional, and the Town Center

- Parks. Parks on the zoning map include Little Crum Creek, Umoja and Thatcher Parks, as well as the Gateway and Triangle parks along Baltimore Pike.
- Institutional. This district incorporates land owned by Swarthmore College, the Wallingford-Swarthmore School District, and CADES. In 2005, Borough Council passed an ordinance creating an overlay district, IN-C Institutional Commercial District, to allow the uses and building associated with the construction of the Swarthmore College Inn. It is interesting to note that although religious uses are allowed in the Institutional zone, all churches in Swarthmore are located in residential zones and therefore are nonconforming.
- Town Center. Using the same district boundaries as the 1976 Business-Apartment zone, an ordinance was passed in 2013 that represented a fundamental change in the approach to zoning in Swarthmore. Promoting pedestrian accessibility, streetscape, and the character of the Town Center, the ordinance allowed multi-use buildings and a number of uses that followed a set of design standards for development.

Supplemental Regulations

A few supplemental regulations in the Swarthmore Zoning Code relate to the ability of an older homeowner to have an apartment in a single-family home or by making it more affordable.

- §1264.08 Conversions to a Two-family Dwelling (1976/2005). Conversions from an existing single-family house to a two-family is allowed in residential zones by Special Exception with a recommendation of the Planning Commission. One dwelling unit must have at least 1600 SF, the other not less than 600 SF. There must also be a separate entrance and utilities.

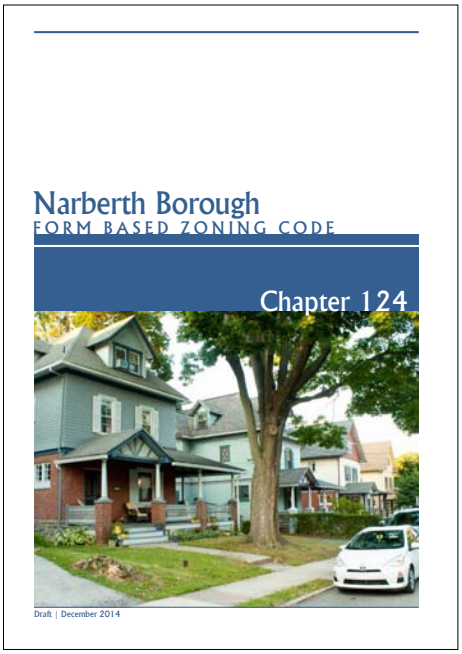
- §1264.15 Bed and Breakfast (2003/2005). With some restrictions, a B&B is a permitted business use in all residential districts and the Town Center if the Zoning Hearing Board approves the Special Exception.

- §1240.05 (52) Home-Based Business (2003). While the MPC requires municipalities to permit "no impact home business" as an accessory use by right in all residential zones, Swarthmore allows a low–impact version where two employees and a certain number of client visits are allowed. A home-based business is also allowed in a conforming accessory building.

PLANNING AND ZONING CURRENT TRENDS AND BEST PRACTICES

Form-Based Zoning Codes

Although there are a great many benefits of allowing a community to grow according a vision rather than complying with a dimension and use checklist, there are relatively few examples locally. In 2007, Franklin Township in Chester County passed an ordinance that includes a form-based manual of design guidelines for site development and building components located within a Traditional Neighborhood Development District. A Traditional Neighborhood Development utilizes many of the same design principals as New Urbanism, but applies them to the scale of a neighborhood or town.



In 2008, Lansdowne delineated three neighborhood Conservation Districts that utilize form-base design guidelines, with a goal of protecting buildings in historic districts and preserving the character of its neighborhoods.

In 2014, the Montgomery County Planning Commission helped prepare a completely new zoning ordinance for Narberth Borough. Narberth determined that not only did the existing 1940s zoning code bear little resemblance to what actually existed in the Borough, it also did not effectively protect the Borough's unique character. The comprehensive document encompasses simplified zoning districts and design guidelines for each building type and some elements such as porches. Graphic illustrations and photographs convey the zoning code's intent.

Accessory Dwelling Unit (ADU)

Accessory Dwelling Units that are allowed in zoning ordinances are becoming more common as communities are built out, change their viewpoint, and become familiar with the planning tool. ADUs can support caregiving and provide a source of essential income where homeowners shoulder a growing property tax burden. They also create smaller, independent housing units in family neighborhoods for those who do not wish to live in large multi-family building.

ADU ordinances have been in existence since the 1980s. It appears that as a municipality gains experience with the ordinance, the ordinance is later amended. The first ADU ordinances often have been amended to make the regulations more liberal to encourage their use. In 2002, California mandated that cities allow second units in single-family residential districts, subject to conditions outlined by local municipalities. A few national ordinance examples include:

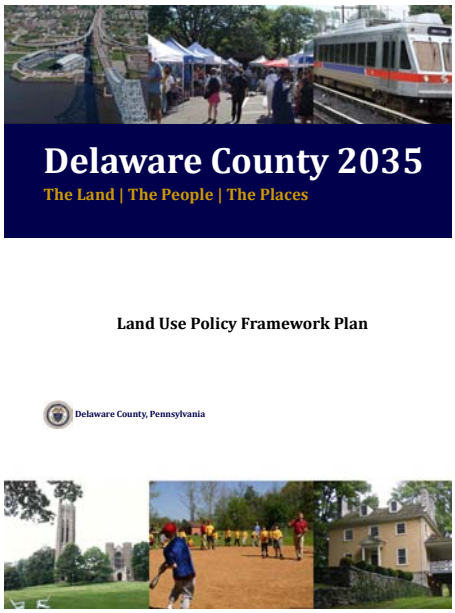
- Portland, Oregon (amended 1998) Title 33, Chapter 33.205
- Daly City, California (1983)
- Berkeley, California (amended 2015)
- Santa Cruz, California (2003), Chapter 24.16, Part 2
- Austin and Houston, Texas
- Minneapolis, Minnesota (2014)
- Lexington, Massachusetts (1983, amended 2005), Article V, §135-19
- Sedona, Arizona (2010)
- Arvada, Grand Junction, & Golden, Colorado
- Missoula, Montana
- Bellingham & Tacoma, Washington
- Barnstable, Massachusetts (2000)
- Wellfleet, Massachusetts (2006)

ACCESSORY DWELLING UNIT ORDINANCE CASE STUDY

Seattle, WA

Seattle has permitted the creation of ADUs in new and existing housing since 1994. An evaluation of the law between 1994 and 1998 showed that it increased the age diversity of many neighborhoods, since many of the new ADUs were occupied by either younger or older adults.

Livable Community Indicators for Sustainable Aging in Place, Stanford Center on Longevity, 2013, pg.11]



As previously mentioned, several local regional planning agencies are actively promoting the adoption of Accessory Dwelling Unit ordinances. The Delaware Valley Regional Planning Commission (DVRPC) promotes accessory apartments an important municipal zoning tool in its long-range comprehensive plan, *Connections 2040 Plan for Greater Philadelphia*. On the county level, the Montgomery County Planning Commission (MCPC) has also issued a comprehensive plan *MONTCO 2040: A SHARED VISION* in 2014, as well as publishing a number of model ordinances and reports. According to the MCPC, there are 24 municipalities in Montgomery County that allow the construction of "mother-in-law suites". In addition to those, MCPC assisted Abington Township in drafting a completely new zoning ordinance for adoption in 2014 that incorporated ADUs with design guidelines.

Delaware County's comprehensive plan, *Delaware County 2035*, has several components have been completed. The Land Use Policy Framework was completed in 2013, while the transportation and housing plans are scheduled for the future.

When municipalities enact Accessory Dwelling Unit ordinances, they often have provisions to ensure that the architectural character of an existing neighborhood is preserved while providing additional housing options. For example, Philadelphia's ADU ordinance specifically mentions several aging-in-place themes and states that ADUs can help seniors remain in their homes (see below).

Using similar building materials, colors, and architectural details contribute to the preservation of the neighborhood's character. [Accessory dwelling units: what they are and why people build them, accessorydewllings.org, radworld (creative commons) photo]

ACCESSORY DWELLING UNIT ORDINANCE CASE STUDY

Philadelphia, PA

In 2012, Philadelphia adopted a completely revamped zoning code. The ADU section cites aging-in-place themes of affordability, housing options, and accessibility, and states that ADUs help advance City policies by:

(.a) accommodating new housing units while preserving the character of existing neighborhoods;
(.b) allowing efficient use of the City's existing housing stock and infrastructure;
(.c) providing housing options and choices that respond to varying income levels, changing household sizes and lifestyle needs;
(.d) providing a means for residents – particularly seniors, single parents, and empty-nesters – to remain in their homes and neighborhoods, and obtain extra income, security, companionship, and assistance; and
(.e) accommodating a broader range of accessible and more affordable housing.

The Accessory Dwelling Unit regulations are intended to promote the benefits of ADUs, "while also preserving neighborhood character and promoting predictability and certainty of established neighborhoods". ADUs are permitted within a structure's interior or in a detached building such as a garage. No additional parking spaces are required. The zoning code allows one ADU in single-family and twin homes, and are allowed by right in residential districts providing they comply with the following:

- The owner of the principal property must live either in the principal property or in the ADU.
- Only one entrance to a house containing an ADU can be located on a side that faces a street.
- ADUs cannot exceed 800 SF.

Philadelphia Zoning Code, Title 14, §14.604 (11), 2012

RECOMMENDATIONS

Unfamiliarity with some of the zoning concepts, technical language, and local examples can sometimes make changes difficult. Tools that are enthusiastically accepted by professional planners as being clearly beneficial to a municipality, often just need a broader acceptance or track record before becoming commonplace. As an example, early rails-to-trails projects faced formable opposition from property owners that feared vandalism, decline in property values, noise, and the lack of privacy. As projects were completed nationally, local municipalities ventured into planning trail projects. Nearby Swarthmore, the Radnor Trail planners faced similar vocal community opposition. Now completed, the Radnor trail is often cited by other local planners because there is evidence of how much residents value trail and statistics to show that proximity to the trail increased property values.

Addressing specific resident concerns in the planning process and directly in ordinance language will be essential. There is a vast array of literature, case studies and other sources that can provide background information on specific planning and zoning topics. Technical support from regional planners is also available. DVRPC has a municipal outreach program and can assist with outlining possible funding sources such as the Efficient Growth for Growing Suburbs or Transportation and Community Development Initiative programs.

NARBERTH BOROUGH NEWSLETTER

Special Edition April 2015

AN INFORMATIONAL PUBLICATION TO KEEP BOROUGH RESIDENTS INFORMED OF LOCAL HAPPENINGS FROM NARBERTH BOROUGH COUNCIL

SPECIAL EDITION ON THE DRAFT FORM-BASED ZONING CODE

Narberth Borough has been working on a complete revision of the town's zoning code for several years. With the help of the Montgomery County Planning Commission, we have produced a draft that is ready for public review and comment. We've sent this special edition of the Borough newsletter out to all residents to inform you of what's been going on and invite you to join the discussion.

An Executive Summary from the Narberth Planning Commission

Narberth, in the main, comprises small houses on small lots in close proximity to their neighbors. Because of this (or in spite of this) our town remains highly desirable with very strong property values. There is a different quality to Narberth that residents and want-to-be residents prize. The new zoning code is intended to help protect and preserve the quality of our town.

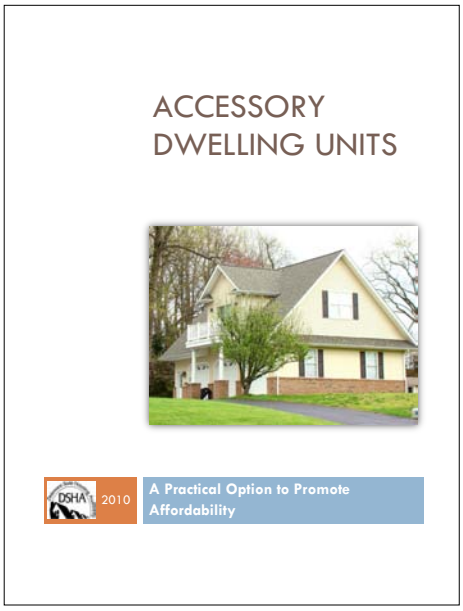
Narberth Borough

Chapter 124

The Zoning Code's Past

Zoning is a set of local laws that regulate the way that property is used and built upon. Narberth has had a zoning code since 1940. When it was first adopted, the majority of the buildings in Narberth were

To educate residents and business owners about its new form-based zoning code, Narberth Borough hosted a walking tour to describe the changes, maintained a blog, and issued a newsletter to answer common questions. [www.narberthborough.com]



ACCESSORY DWELLING UNITS

DSHA 2010

A Practical Option to Promote Affordability

To promote affordable housing, the Delaware Housing Authority's Affordable Housing Resource Center published an informational brochure about Accessory Dwelling Units (ADUs) in 2010. The 12-page brochure describes the benefits of ADUs, outlines responses to a number of community concerns, and cites a number of ADU examples. [www.destatehousing.com]