

# LOWER GWYNEDD TOWNSHIP BOARD OF SUPERVISORS REGULAR PUBLIC MEETING

Tuesday, January 23, 2024, 7:00 p.m.



To join the meeting via Zoom:

<https://us02web.zoom.us/j/81493460023?pwd=R3lza1U1FNWU1JmVtdmU1JVQ09>

Call #: 1-646-876-9923

Meeting ID: 814 9346 0023 Passcode: 429371

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## CALL TO ORDER AND PLEDGE OF ALLEGIANCE

### ANNOUNCEMENTS AND PRESENTATIONS

The Board of Supervisors met in executive session prior to tonight's meeting to discuss matters of real estate and litigation

Presentation of the Lower Gwynedd Township Environmental Advisory Council's **Going Green Awards**

Swearing in Greg Rozman as an officer in the Lower Gwynedd Township Police Department

Swearing in William (Townie) Henry as a sergeant in the Lower Gwynedd Township Police Department

Police commendations

### PUBLIC COMMENTS

Citizen comments, concerns, questions for items not on the agenda  
(Comments on agenda items will be taken when those items are discussed by the Board)

### BUILDING AND ZONING

1. Authorization to initiate the ordinance amendment process, including authorization to advertise the legal notice, for an amendment to temporary sign regulations in Title VI, the Zoning Ordinance, in the Township Code

### GENERAL BUSINESS

1. Appoint Frances McKenzie to the Lower Gwynedd Township Parks and Recreation Board to fill an unexpired term ending December 31, 2027
2. Reappoint Mary Claghorn to a three-year term as a Lower Gwynedd Township representative on the Wissahickon Valley Public Library board
3. Authorization to advertise an amendment creating a new Chapter 858, entitled "Responsible Contractor Requirements" in the Township Code

4. Consideration of proposal to market Ingersoll House for sale
5. Request to authorize the Township Manager to sign a contract extension with James D. Morrisey, Inc. for construction of the Spring House Roadway Improvement Project Phase 2
6. Consideration of Stipulation to Settle for Tax Assessment Appeal for 1000 Radcliff Lane
7. Consideration of Stipulation to Settle for Tax Assessment Appeal for 208 Cathcart Road
8. Review of Township Engineer's Report - any questions for the Township Engineer?
9. Review of Traffic Engineer's Report - any questions for the Traffic Engineer?
10. Review of financials Balance Sheet and YTD Report - December 2023
11. Approval of invoices
12. Approval of minutes - January 2, 2024

### **SUPERVISOR LIAISON REPORTS**

Questions about Volunteer Commission Meeting Highlights

### **STAFF UPDATES**

Updates from staff on municipal activities and projects

### **SUPERVISORS COMMENTS**

Comments or questions from the Board of Supervisors

### **ADJOURNMENT**

#### **UPCOMING MEETING DATES\***

HUMAN RELATIONS COMMISSION	THURS	03/07/2024	7:00 P.M.
BOARD OF SUPERVISORS	TUES	02/13/2024	7:00 P.M.
ENVIRONMENTAL ADVISORY COUNCIL	WED	02/14/2024	7:00 P.M.
ZONING HEARING BOARD	THURS	02/08/2024	6:00 P.M.
PARKS AND RECREATION	TUES	02/20/2024	6:00 P.M.
PLANNING COMMISSION	WED	02/21/2024	7:00 P.M.
JOINT EAC/BOS	THURS	02/29/2024	7:00 P.M.

\*Please check the Township website to confirm meeting dates and times.

## Memorandum

**To: Board of Supervisors**  
**Mimi Gleason, Township Manager**

**From: Sandi Feight, Recreation Director**

**Date: November 9, 2023**

**Re: Recommendation Going Green Award**

The Going Green Award Sub-Committee reviewed the nominations for the award. There were six nominations. The Sub-Committee dedicated time to interviewing each nominee and concluded each interview with a thorough discussion. The final step was for the sub-committee to vote to determine the top three candidates for the award. They were reminded that the purpose of the Going Green Award is to recognize sustainability initiatives that improve or protect the environment and our natural resources, and to raise awareness about important environmental issues. Award project areas of focus include energy; water; sustainable land practices; waste minimization; and community outreach and betterment.

Based on the scoring;

Gwynedd Friends Meeting placed 1<sup>st</sup> with various land projects, native plantings on their grounds, pollinator gardens, rain gardens, and a community garden. These many land projects are able to reach many people. They are used as educational programming for the community and school to take part and use of volunteers to make these projects happen.

Harth Builders placed 2<sup>nd</sup> for their new headquarters building on Bethlehem Pike. They installed many sustainable initiative and environmental stewardship projects such as the use of solar panels cutting energy usage, EV charging stations, adding an EV vehicle to their fleet, LED lighting throughout the building, programmable thermostats, stormwater management in parking lot, and more. In addition to their sustainable impact, they use these projects and their experience to educate clients on green building practices

Mary Pellegrino, placed 3<sup>rd</sup>, is a student at Gwynedd Mercy Academy High School. She has done plantings on the school campus. She also practices waste management at home through composting food waste placing the composted material back into her pollinator friendly and vegetable garden completing the food waste cycle. Her families 3 beehives thrive on her pollinator gardens and native plants.

These candidates' projects all checked the boxes with the sustainable practices they have taken to improve or protect the environment and to raise awareness of environmental issues in our community. The Sub-Committee was most impressed with Mary Pellegrino, with the work she has done on her school campus and positive environmental practices she is doing at home.

The EAC at their November 8, 2023 meeting voted and concluded with the same results in places. The EAC would also like to make a further recommendation that Harth Builders receive and award for Honorable Mention and that Mary Pellegrino receive a Youth Award.



## MEMORANDUM

**ATTN:** Board of Supervisors

**DATE:** Friday, January 19, 2024

**FROM:** Jamie P. Worman, Assistant Township Manager *Jamie Worman*

**SUBJ:** Proposed Sign Ordinance Amendment (Temporary Signs)-Authorization to Advertise

Township staff is finalizing a proposed amendment to **Chapter 1292 Signs** of the Lower Gwynedd Zoning Ordinance as it relates to temporary signs, excluding real estate signs. The draft version was reviewed and discussed at the January Building & Zoning Subcommittee meeting and the recommendations resulting from that conversation are being incorporated into the proposed text. Essentially, the proposed amendment redefines “temporary signs”, removes regulations for temporary signs from residential zoning districts, and revises regulations for temporary signs in non-residential zoning districts. A comprehensive overhaul of the sign ordinance in its entirety is anticipated later this year but will take a significant amount of time to complete and is not the subject of the amendment currently before the BOS.

Staff is requesting authorization to begin the ordinance amendment process for the temporary signs update which includes the finalization of the proposed ordinance text, commencement of the public notification and review process, agency review process, and advertisement of a public hearing. The ordinance will be before the BOS at a future meeting for action.

***Recommended motion: Motion to authorize staff to initiate the ordinance amendment process, including authorization to advertise the legal notice, for an amendment to temporary sign regulations in Title VI, the Zoning Ordinance, in the Township Code.***

**LOWER GWYNEDD TOWNSHIP  
MONTGOMERY COUNTY, PENNSYLVANIA**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE TOWNSHIP OF LOWER GWYNEDD, MONTGOMERY COUNTY, PENNSYLVANIA, AMENDING THE SIGN PROVISIONS OF THE LOWER GWYNEDD TOWNSHIP ZONING CODE TO ADD A NEW DEFINITION OF "TEMPORARY SIGN", TO REVISE AND ADD PROVISIONS GOVERNING TEMPORARY SIGNS IN NON-RESIDENTIAL DISTRICTS AND FOR CERTAIN NON-RESIDENTIAL USES IN RESIDENTIAL DISTRICTS; REPEALING ALL INCONSISTENT ORDINANCES OR PARTS THEREOF; PROVIDING A SEVERABILITY CLAUSE; AND PROVIDING AN EFFECTIVE DATE.**

**WHEREAS**, the Board of Supervisors ("**Supervisors**") has met the procedural requirements of the Pennsylvania Municipalities Planning Code, 53 P.S. §10101, et. seq., for the adoption of this Ordinance, including holding a public hearing;

**WHEREAS**, the Second Class Township Code authorizes the Supervisors to make and adopt ordinances that are consistent with the Constitution and the laws of the Commonwealth that it deems necessary for the proper management, care and control of the Township, and the maintenance of peace, good government, health and welfare of the Township and its citizens;

**WHEREAS**, the Supervisors have determined that it is in the best interests of the Township that the text of the Lower Gwynedd Township Zoning Code (the "**Zoning Code**") be amended as provided herein.

**NOW, THEREFORE, BE IT ORDAINED AND ENACTED** by the Board of Supervisors of Lower Gwynedd Township, and it is hereby ordained and enacted by the authority of the same, to wit:

**SECTION 1. AMENDMENT.** Title Six of the Code, entitled "Zoning," is hereby amended as follows:

- (1) The definition of "temporary sign" as set forth in Section 1250.04(60), is hereby amended to read as follows:

*"Temporary sign" means a type of non-permanent sign that is located on private property. Portable signs or any sign not permanently embedded in the ground, or not permanently affixed to a building or sign structure that is permanently embedded in the ground, are considered temporary signs. A temporary sign shall comply with the provisions of the Zoning Code for permanent signs regarding location, construction, and public safety.*

(2) Subparagraph (b) of Section 1292.06, is replaced in its entirety with the following:

*(b) Temporary Signs.*

*(1) Temporary signs shall be permitted on all properties, subject to compliance with subparagraphs (3)E. and (3)F. below.*

*(2) Temporary signs shall be permitted in non-residential zoning districts and on non-residential properties (excluding No-Impact Home-Based Businesses as defined in Section 603(l) of the Pennsylvania Municipalities Planning Code, 53 P.S. Section 10603(l)), subject to compliance with subparagraphs (3)A. through (3)D. below.*

*(3) Temporary signs shall be subject to the following regulations:*

*A. Maximum area: eight (8) square feet*

*B. Display period: Temporary signs may be displayed for two (2) periods of display per calendar year, and each period of display shall not exceed fourteen (14) consecutive days.*

*C. Illumination: Temporary signs shall not be illuminated.*

*D. Number of signs: No more than five (5) temporary signs are permitted per street frontage.*

*E. All temporary signs must be made of durable materials and shall be well-maintained. Temporary signs that are frayed, torn, broken, or that are no longer legible will be deemed unmaintained and required to be removed.*

*F. Permission: The party posting the temporary sign is solely responsible for obtaining the permission of the property owner before posting their temporary sign.*

*(4) Temporary Signs- Sign Permits.*

*A. Temporary signs, as defined in this Zoning Code, are exempt from standard permit requirements, but must abide by the terms of this ordinance.*

*B. Temporary signs shall comply with the provisions of this Zoning Code for permanent signs regarding location, construction, and public safety. Temporary directional signs shall comply with the provisions of Section 1292.05(d).*

*(5) Exempted Signs. The following temporary signs are exempt from the provisions of this chapter:*

A. *By or with the permission of a government agency, a governmental flag, public monument, public announcement, historic identification signs or plaques, and municipal identification signs.*

B. *Flags, not to exceed forty (40) square feet, each.*

C. *Volunteer fire department recruitment signs.*

(6) *Prohibited Signs. The following temporary signs are prohibited:*

A. *Signs containing any word, place, symbol, or character which interferes with, imitates, or resembles an official traffic control sign.*

**SECTION 2. REPEALER.** All Ordinances or parts of Ordinances inconsistent herewith or in conflict with any of the specific terms enacted hereby, to the extent of said inconsistencies or conflicts, are hereby specifically repealed.

**SECTION 3. SEVERABILITY.** In the event that any section, sentence, clause, phrase, or word of this Ordinance shall be declared illegal, invalid, or unconstitutional by any Court of competent jurisdiction, such declaration shall not prevent, preclude or otherwise foreclose enforcement of any of the remaining provisions of this Ordinance.

**SECTION 4. EFFECTIVE DATE.** This Ordinance shall become effective five (5) days after its adoption.

**ENACTED AND ORDAINED** by the Lower Gwynedd Township Board of Supervisors this \_\_\_\_ day of \_\_\_\_\_, 2024.

**ATTEST:**

**LOWER GWYNEDD TOWNSHIP  
BOARD OF SUPERVISORS**

\_\_\_\_\_  
**MIMI GLEASON, TOWNSHIP MANAGER**

By: \_\_\_\_\_  
**DANIELLE A. DUCKETT, CHAIRPERSON**

# Memo

**To:** Board of Supervisors  
**From:** Mimi Gleason, Township Manager  
**Date:** January 19, 2024  
**Re:** Responsible Contractor Ordinance



**Recommended Motion: To authorize advertising of the Responsible Contractor Ordinance as amended at this meeting**

A draft ordinance will be forwarded to the Board before the meeting (and added to the website) creating a new Chapter in the Township Code specifying minimum requirements contractors must have to be eligible to bid for Lower Gwynedd projects over a certain cost threshold. The draft is being finalized.

The draft ordinance includes a minimum threshold of \$250,000 that would trigger the ordinance requirements. This minimum varies somewhat among municipalities that have adopted these requirements, including:

East Norriton Township	\$100,000
Jenkintown Borough	\$100,000
Plymouth Township	\$150,000
West Norriton Township	\$250,000
Whitpain Township	\$250,000
Abington Township	\$350,000
Norristown Borough	\$350,000

The Board can decide what amount you want to set as a minimum, as well as any other changes to the ordinance, before it is advertised.



**BOARD OF SUPERVISORS  
LOWER GWYNEDD TOWNSHIP,  
MONTGOMERY COUNTY, PENNSYLVANIA**

**ORDINANCE NO. \_\_\_\_\_**

**AN ORDINANCE OF THE TOWNSHIP OF LOWER GWYNEDD, MONTGOMERY COUNTY, PENNSYLVANIA, ADOPTING A NEW CHAPTER 858 OF THE LOWER GWYNEDD TOWNSHIP CODE, ENTITLED, “RESPONSIBLE CONTRACTOR REQUIREMENTS” TO ESTABLISH MINIMUM REQUIREMENTS FOR CONTRACTORS WHO PERFORM CONSTRUCTION WORK ON PUBLIC WORKS PROJECTS WHERE THE CONTRACT AMOUNT EXCEEDS \$250,000.00; SEVERABILITY; REPEALER; AND EFFECTIVE DATE.**

**WHEREAS**, the Board of Supervisors of Lower Gwynedd Township (the “**Board**”) desires to adopt certain provisions to ensure that contractors and subcontractors that perform public works construction projects (“**Public Works Projects**”), including but not limited to work on public buildings, meet certain minimum requirements to ensure that they have the capacity, expertise, personnel and other qualifications and resources necessary to successfully perform the contract in a timely, reliable and cost-effective manner; and

**WHEREAS**, the Board finds that such provisions shall serve the best interest of the citizens of Lower Gwynedd Township, by requiring that all bidders for Public Works Projects shall possess the highest qualifications necessary to perform these contracts; and

**WHEREAS**, the Township is required, pursuant to the Second Class Township Code (the “**Code**”), to award contracts for Public Works Projects, to the lowest “responsible” bidder, and the Township deems “responsible” bidders to possess all of the qualifications, expertise, personnel, and resources set forth under the regulations adopted in this Ordinance; and

**WHEREAS**, the requirements of this Ordinance shall apply to all prime contracts necessary for the construction of a Public Works Project with a cost of work in excess of Two Hundred Fifty Thousand Dollars (\$250,000.00); and

**NOW, THEREFORE, BE IT ORDAINED AND ENACTED** and it is hereby ordained and enacted as follows:

**SECTION 1. AMENDMENT OF CODE TO ADD RESPONSIBLE CONTRACTOR REQUIREMENTS.**

Title Four of the Lower Gwynedd Township Code, entitled “Business Regulation,” is hereby amended by adding Chapter 858, to be entitled “Responsible Contractor Requirements,” to read as follows:

**“CHAPTER 858 RESPONSIBLE CONTRACTOR REQUIREMENTS**

**§ 858.01. Purpose.**

A. *The Township of Lower Gwynedd (the “Township”) recognizes that there is a need to ensure that all construction work on Public Works Projects (herein defined) is performed by responsible, qualified firms that maintain the capacity, expertise, personnel and other qualifications and resources necessary to successfully perform the contracts in a timely, reliable, and cost-effective manner.*

B. *To effectuate the purpose of selecting responsible contractors for construction work on Public Works Projects, and to protect the Township’s investments in such contracts, prospective contractors and subcontractors should be required to meet pre-established, clearly defined, minimum standards relating to contractor responsibility, including requirements and criteria concerning technical qualifications, competency, expertise, adequacy of resources, including equipment, financial and personnel, and satisfactory records regarding past project performance, safety, law compliance and business integrity.*

C. *Further, due to the critical impact that skilled construction craft labor has on contracts for Public Works Projects, and due to the limited availability of skilled construction craft labor and imminent craft labor skill shortages, it is necessary to require contractors and subcontractors to participate in established, formal apprenticeship training programs as a condition of bidding, for the purpose of both promoting successful project delivery and ensuring future workforce development and availability. It is important that skilled workers performing Public Works Projects for the Township have proper safety training. The Township also recognizes that it is beneficial to the local community to ensure that firms receiving contracts for Public Works Projects provide adequate wages and benefits to their employees and utilize fair business, employment and training practices that have a positive impact on local communities affected by such contracts.*

D. *Therefore, the Township shall require compliance with the provisions of this Ordinance by business entities seeking to provide services as specified herein. The requirements of this Ordinance are intended to supplement, not replace, existing contractor qualification standards or other criteria currently required by the Township.*

**§ 858.02. Responsible Contractor Requirements.**

A. *This Ordinance shall apply to public works projects undertaken by the Township for construction, demolition, alteration, renovation, modernization, service or maintenance of buildings, structures, or facilities, valued at Two Hundred Fifty Thousand Dollars (\$250,000.00) or more (collectively, “Public Works Project(s)”). All contractors and subcontractors of any tier that perform work on Public Works Projects, regardless of value of individual contract or subcontract packages, shall meet the requirements of this Ordinance.*

(1) *All individuals and entities engaged in contracts covered by this Ordinance shall be qualified, responsible contractors or subcontractors that have sufficient capabilities in all respects to successfully perform contracts on which they are engaged, including the necessary experience, equipment, technical skills, and qualifications and organizational, financial and personnel resources.*

(2) *Individuals and entities bidding on contracts specified in this Ordinance shall also be required to have a satisfactory past performance record, including a positive safety record and a satisfactory record of law compliance, integrity, and business ethics.*

(3) *If after two (2) attempts by the Township to award a contract to a responsible bidder, as defined in this Ordinance, no bidder is determined to meet the requirements of this Ordinance, the Township may waive the provisions of this Ordinance when attempting to bid the project.*

**§ 858.03. Contractor Responsibility Certification.**

A. *As a condition of performing construction, plumbing, heating, ventilating and electrical work for the erection or alteration of any Public Works Project subject to this Ordinance, a general contractor, construction manager or other lead or prime contractor seeking award of a contract shall submit a Contractor Responsibility Certification at the time it submits its bid for a contract.*

B. *The Contractor Responsibility Certification shall be completed on a form provided by the Township and shall reference the project for which a bid is being submitted by name and contract or project number.*

C. *In the Contractor Responsibility Certification, the construction manager, general contractor or other lead or prime contractor (the "Firm") shall confirm the following facts regarding its past performance, safety performance and work history and its current qualifications and performance capabilities:*

(1) *The Firm has all valid, effective licenses, registrations or certificates required by federal, state, county, or local law, including by not limited to, licenses, registrations or certificates required to (a) do business in the designated local; and (b) perform the contract work it seeks to perform. These shall include, but not limited to, licenses, registrations, or certificates for any type of trade work or specialty work which the firm proposes to self-perform.*

(2) *The Firm meets the bonding requirements for the contract, as required by applicable law or contract specifications and any insurance requirements, as required by applicable law or contract specifications, including general liability insurance, workers compensation insurance and unemployment insurance requirements.*

(3) *The Firm has not been debarred by any federal, state, or local government agency or authority in the past three (3) years.*

(4) *The Firm has not defaulted on any project in the past three (3) years.*

(5) *The Firm has not had any type of business, contracting or trade license, registration, or other certification suspended or revoked in the past three (3) years.*

(6) *The Firm has not been cited for a violation of federal, state, or local safety laws in the past three (3) years.*

(7) *The Firm and its owners have not been convicted of any crime relating to the contracting business by a final decision of a court or government agency in the past ten years.*

(8) *The Firm has not within the past three (3) years been found in violation of any law applicable to its contracting business, including but not limited to, licensing laws, tax laws, prompt payment laws, wage and hour laws, prevailing wage laws, environmental laws, or others, where the result of such violation was the payment of a fine, back pay damages or any other type of penalty in the amount of One Thousand Dollars (\$1,000.00) or more.*

(9) *The Firm will pay all craft employees that it employs on the project the current wage rates and benefits as required under applicable federal, state, or local wage laws.*

(10) *The Firm will ensure that all craft labor it employs will have completed, minimally, the OSHA ten (10)-hour safety training course established by the U.S. Department of Labor. If the firm is a prime contractor, it shall ensure that at least one person on the project has completed the OSHA thirty (30)-hour construction safety training course established by the U.S. Department of Labor.*

(11) *The Firm participates in an apprenticeship program for each separate trade or classification in which it employs craft employees and shall continue to participate in such program or programs for the duration of the project.*

(a) *For purposes of this section an apprenticeship program must be currently registered with and approved by the U.S. Department of Labor or a state apprenticeship agency and has graduated apprentices to journeyman status for a least three (3) of the past five (5) years, or every year since the Firm's establishment*

(b) *If a Firm is identified as the lowest responsible bidder or otherwise selected as the prospective awardee or as a subcontractor of an awardee, it shall provide appropriate documentation, as determined by the Township, to verify it meets the requirements of this section for each trade or classification of craft workers it will employ on the project. This verification shall be provided prior to performance of work by the Firm.*

(12) *The Firm has all other technical qualifications and resources, including equipment, personnel, and financial resources, to perform the referenced contract, or will obtain same through the use of qualified, responsible subcontractors.*

(13) *The Firm will maintain all qualifications, resources and capabilities referenced in this certification throughout the duration of the construction project.*

(14) *The Firm shall notify the Township within seven (7) calendar days of any material changes to all matters attested to in this Contractor Responsibility Certification.*

(15) *The Firm must ensure that the Contractor Responsibility Certification required by this section shall be executed by a person who has sufficient knowledge to address all matters in the certification and shall include an attestation stating, under the penalty of perjury, that the information submitted is true, complete, and accurate.*

D. *Execution by the Firm of the Contractor Responsibility Certification required by this section shall not establish a presumption of contractor responsibility and the Township may require any additional information it deems necessary to evaluate a Firm's status as a responsible contractor, including technical qualifications, financial capacity or other resources and performance capabilities. The Township may require that such information be included in a separate Statement of Qualifications and Experience or as an attachment to the Contractor Responsibility Certification.*

E. *The submitting Firm shall stipulate in the Contractor Responsibility Certification that, if it receives a Notice of Intent to Award Contract, it will provide a Subcontractor list and required subcontractor information as specified in Section 858.05 of this Ordinance.*

F. *If the submitting Firm has ever operated under another name, or controls, is controlled by, another company or business entity or in the past five (5) years controlled or was controlled by another company or business entity, whether as a party company, subsidiary or in any other business relation, it shall attach a separate statement to its Contractor Responsibility Certification that explains in detail the nature of any such relationship. Additional information may be required from such an entity if the relationship in question could potentially impact contract performance.*

G. *If a Firm fails to provide a Contractor Responsibility Certification required by this section, it shall be disqualified from bidding. No action of any nature shall lie against the Township because of its refusal to accept a bid for failing to provide information required by this section.*

**§ 858.04. Notice of intent to award contract.**

A. *After it has received bids for a Public Works Project which is covered by the terms of this Ordinance, the Township shall issue a Notice of Intent to Award Contract to the Firm offering the lowest responsible bid.*

B. Such Notice shall be issued in accordance with the schedule established in the bid specifications and shall stipulate that the contract award will be conditioned on the issuance of a written Contractor Responsibility Determination, as required by Section 858.06 of this Ordinance.

**§ 858.05. Subcontractor lists and responsibility certifications.**

A. Within seven (7) calendar days from the date of the Notice of Intent to Award Contract, a prospective awardee shall submit to the Township a subcontractor list containing the names of subcontractors that will be used for the referenced project, their addresses, and a description of the work each listed subcontractor will perform on the project.

B. At the time a prospective awardee submits the subcontractor list it shall also submit to the Township Subcontractor Responsibility Certifications for all listed subcontractors. Subcontractor Responsibility Certifications shall be executed by the respective subcontractors on forms prepared by the Township and shall contain the same information as representations required in Contractor Responsibility Certifications, including verification of apprenticeship qualifications as required by Section 858.03.C(11), for each trade or classification of craft workers it will employ on the project.

C. Subcontractor Responsibility Certifications shall be executed by persons having sufficient knowledge to address all matters in the certification and shall include an attestation stating, under the penalty of perjury, that all information submitted is true, complete, and accurate.

**§ 858.06. Contractor Responsibility Review and Determination.**

A. After a Notice of Intent to Award Contract has been issued, the Township shall undertake a timely review process to determine whether the prospective awardee is a qualified, responsible contractor in accordance with the requirements of this Ordinance and other applicable laws and regulations and has the resources and capabilities to successfully perform the contract.

B. As part of this review process, the Township shall ensure that the Contractor Responsibility Certification, the Subcontractor List, and the Subcontractor Responsibility Certification(s) as required by this Ordinance, have been submitted and properly executed.

C. The Township may conduct any additional inquiries to verify that the prospective awardee and its subcontractors have the technical qualifications and performance capabilities necessary to successfully perform the contract and that the firms have a sufficient record of law compliance and business integrity to justify the award of a public contract. In conducting such inquiries, the Township may seek relevant information from the Firm, its prior clients or customers, its subcontractors, or any other relevant source.

D. *If, at the conclusion of its internal review, the Township determines that all responsibility certifications have been properly completed and executed and if it concludes that the qualifications, background and responsibility of the prospective awardee and the firms on its subcontractor list are satisfactory, it shall issue, as part of the Notice of Award, a written Contractor Responsibility Determination verifying that the prospective awardee is a qualified, responsible contractor. In the event a Firm is determined to be non-responsible, the Township shall advise the Firm of its finding in writing and proceed to conduct a responsibility review of the next lowest, responsible bidder or, if necessary, re-bid the project. Prior to the awarding of a contract the Township must follow the procedures as set by applicable state and federal laws.*

E. *A written Contractor Responsibility Determination may be revoked or revised in any manner at any time if the Township obtains relevant information warranting such action. The Township shall send written notice to the contractor if it revokes or revised the Contractor Responsibility Determination.*

F. *The Contractor Responsibility Certification for a Firm identified in a Notice of Intent to Award Contract, Subcontractor Lists, and Subcontractor Responsibility Certifications, similar to other bid documents, shall be made available to the public consistent with the Pennsylvania Right to Know Law.*

G. *If the Township determines that a Contractor or Subcontractor Responsibility Certification contains false or misleading material information that was provided knowingly or with reckless disregard for the truth or omits material information knowingly or with reckless disregard of the truth, the Firm for which the certification was submitted shall be prohibited from performing work for the Township for a period of three (3) years and shall be subject to any other penalties and sanctions, including contract termination, available to the Township under law. A contract terminated under these circumstances shall further entitle the Township to withhold payment of any monies due to the Firm as damages.*

H. *A procurement contract subject to this Ordinance shall not be executed until all requirements of this Ordinance have been fulfilled.*

**§ 858.07. Subcontractor Responsibility Review Requirements.**

A. *A construction manager, general contractor, or other lead or prime contractor shall not be permitted to use a subcontractor on any work performed for the Township unless it has identified the subcontractor on its Subcontractor List and provided a Subcontractor Responsibility Certification in accordance with the requirements of this Section 858.07.*

B. *A subcontractor listed on a firm's Subcontractor List shall not be substituted unless written authorization is obtained from the Township and a Subcontractor Responsibility Certification is provided for the substitute subcontractor.*

C. *In the event that the Township determines that a prospective subcontractor listed by the apparent low bidder does not meet the responsibility standards of this section, it may, after informing the prospective awardee, exercise one of the following options:*

(1) *Permit the awardee to substitute a qualified, responsible, subcontractor in accordance with the requirement of this section;*

(2) *Require the awardee to self-perform the work in question if the Firm has the required experience, licenses, and other qualifications to perform the work in question;*  
*or*

(3) *Disqualify the prospective awardee.*

D. *In the event that a subcontractor is disqualified under this section, the general contractor, construction manager or other lead or prime contractor shall not be permitted to make any type of contractual claim against the Township on the basis of a subcontractor disqualification.*

**§ 858.09. Public Review Process.**

A. *The contractor responsibility certification for a Firm identified in a notice of intent to award contract, subcontractor lists and subcontractor responsibility certifications, shall be made immediately available to the public for inspection through a publicly accessible website or other comparable means.*

B. *During the public review period, any person or organization may protest a contractor or subcontractor for failing to meet applicable requirements of this Section or on any other relevant grounds by submitting a letter with supporting evidence to the Township.*

C. *If the Township determines that a contractor or subcontractor responsibility certification contains false or misleading material information that was provided knowingly or with reckless disregard for the truth or omits material information knowingly or with reckless disregard of the truth, the firm for which the certification was submitted shall be prohibited from performing work for the Township for a period of three (3) years and shall be subject to any other penalties and sanctions, including contract termination, available to the Township under law. A contract terminated under these circumstances shall further entitle the Township to withhold payment of any monies due to the firm as damages.*

D. *A procurement contract subject to this Section shall not be executed until all requirements of this Part have been fulfilled and until contractor and subcontractor responsibility certifications and subcontractor lists have been made available for public inspection for at least twenty-one (21) days.*



**§ 858.09. Emergencies.**

*Should the Lower Gwynedd Board of Supervisors determine that emergency circumstances exist that render the requirements and procedures set forth in this Ordinance unduly burdensome, then in that event the Township may award a procurement contract without application of the terms of this Ordinance.”*

**SECTION 2. SEVERABILITY.** If any sentence, clause, section, or part of this Ordinance is for any reason found to be unconstitutional, illegal, or invalid, such unconstitutionality, illegality or invalidity shall not affect or impair any of the remaining provisions, sentences, clauses, sections, or parts hereof. It is hereby declared as the intent of Board of Supervisors of Lower Gwynedd Township that this Ordinance would have been adopted had such unconstitutional, illegal, or invalid sentence, clause, section, or part thereof not been included therein.

**SECTION 3. REPEALER.** All Ordinances or parts of Ordinances inconsistent herewith or in conflict with any of the specific terms enacted hereby, to the extent of said inconsistencies or conflicts, are hereby specifically repealed. Additionally, the requirements of this Ordinance shall not apply to contracts executed prior to the effective date of this Ordinance, except that the exercise of an option on a contract covered by this Ordinance shall be deemed to create a new contract for purposes of this Ordinance

**SECTION 4. EFFECTIVE DATE.** This Ordinance shall become effective in five (5) days following its legal enactment.

**SIGNATURE PAGE FOLLOWS**

ENACTED AND ORDAINED THIS \_\_\_\_\_ day of \_\_\_\_\_, 2024.

ATTEST:

**BOARD OF SUPERVISORS OF  
LOWER GWYNEDD TOWNSHIP**

\_\_\_\_\_  
**MIMI GLEASON, TOWNSHIP SECRETARY**

By: \_\_\_\_\_  
**DANIELLE A. DUCKETT, CHAIRPERSON**

# Memo



**To:** Board of Supervisors  
**From:** John L. Farrell, Project Manager & EMC  
**Date:** January 18, 2024  
**Re:** Ingersoll Estate Marketing Realtor Selection

*John L. Farrell*

---

**Recommended action: To authorize the Township Manager to sign an agreement with Lei Barry of Keller Williams Real Estate for historic real estate marketing services for the Ingersoll Estate, as revised to the satisfaction of the Township Solicitor.**

Township staff have received final proposals from two realtors who are interested in helping to locate individuals and/or firms that may be interested in preserving the Ingersoll house and barn. The realtors will not serve as representatives for the sale of the property – the actual sale will take place through a public auction.

After discussions with each realtor, their proposed scopes of work were brought in line as closely as possible. Both proposals cover a range of real estate services, including: outreach through social media channels, business databases, and other personal network connections; outreach to historical societies; professional photography of the property, and the creation of a website; posting information about the property on historic home websites; open houses; and conducting property tours. The services would not extend beyond one year from the date of approval of an agreement. Pricing for the services is as follows:

- Lei Barry of Keller Williams: The cost includes a base fee of \$1,500, plus \$475 for professional photography and website creation. Other expenses would likely be incurred with the proposal, such as fees for posting on historic property websites, which cost up to \$100 each. Ms. Barry's lone condition is that she be allowed to refer the Township to the auction company that the Township selects for the sale, so that she may collect a referral fee.
- Jane Douglass of Berkshire Hathaway: The cost would range from \$15,000 to \$29,000, based on the sale price of the property at auction. \$15,000 would be due within 30 days of signing the marketing contract, with any balance due after the auction.

The full proposals from each realtor are attached to this memo. Township staff spoke with a third realtor, but they did not submit a proposal.

Township staff recommend awarding the contract for historic real estate marketing services for the Ingersoll Estate to Lei Barry of Keller Williams Real Estate.



January 16, 2024

To: John Farrell  
Lower Gwynedd Township

From: Lei Barry, Realtor  
Keller Williams Real Estate

Dear John,

Thank you for your call regarding the old Ingersol property which the township currently owns. I was asked to tour the property in January 2023 and was saddened to see the condition of the interior of the house so I am interested in seeing it restored if at all possible or practical.

I personally owned a large historic property (Circa 1740) in Blue Bell for over 30 years and spent many years lovingly restoring it while I raised my family until I sold it in 2005. I initially became interested in historic properties when I was invited to join the Wissahickon Valley Historical Society in 1976. I spent many months researching the history of my property for the book "Whitpain Crossroads in Time" which was published early in 1977, and because of living in one I learned a great deal about, appreciating, restoring, caring for and maintaining historic properties. Having continued as a member of the Wissahickon Valley Historical Society since 1976, historic properties continue to be very special to me.

As a local Realtor since 2002 I have had the opportunity to visit and show historic properties all over the Montgomery and Bucks County area. We have some real gems which have fortunately been preserved but unfortunately there are many which have been neglected, like the Ingersol property.

I would be potentially interested in helping the Township sell the Ingersol property. I understand the need for the township to present the property at a public auction and I will be happy to further discuss auctioneers and the process to market and help find interested buyers. I am familiar with Alderfer Auction Company and what they can do to sell the property. The auction company staff are actually licensed realtors, and they would be the ones to determine the appropriate listing price after a certified appraisal. I can discuss that process with you and the appropriate people if you decide to work with me. In the meantime, you have asked if I will be interested in helping find a potential buyer through some pre-auction marketing, which I will be happy to do.

The primary goal would be to find a buyer who wishes to preserve the property, if possible, rather than demolish it. In that case I would market the property through:

- All the social media channels which I use in my real estate business
- My business and personal database
- Through my historical society connections
- Various business networking groups of which I am a member

Additionally, I would agree to include 2 on site open house tours along with a Township representative and will agree to do 4 private showings if necessary as part of my consulting fee.

I will arrange for my professional photographer to shoot an appropriate number of photographs of the property and to set up a website for the property. Estimated cost would be about \$475 in addition to my marketing fee. If you wish I can also arrange for posts on a few of the popular historical and old house properties websites. They typically run anywhere from \$0-100 each site for ninety days.

In addition to my consulting and marketing fee I would have one condition and that will be that whatever auction company you decide to choose to ultimately sell the property, that you would allow me to make that connection via me referring you to the auction company. The auction company would then pay a referral fee to me at settlement.

I love helping people and have been well known for many years for my community service and contributions. I have received many community awards over the years and in fact, I recently received an award from the Greater Montgomery County Chamber of Commerce called the Raymond H. Miley, Jr. Distinguished Service Award. Mr. Miley was very well known for his community service in Upper Gwynedd Township and around the county. It was an honor to receive the award in December.

The fee for my marketing service would be \$1,500 plus the extras mentioned above.

Please don't hesitate to reach out to me with any questions and thank you for inviting me to help.

Sincerely,

Lei Barry, Realtor  
ABR, GRI, CRS, SRES, ASP, SRS  
215-654-6060 (direct)  
215-605-7024 (mobile)  
[lei@leibarryteam.com](mailto:lei@leibarryteam.com)  
[www.LeiBarryTeam.com](http://www.LeiBarryTeam.com)  
Keller Williams Real Estate  
910 Harvest Dr. Suite 100  
Blue Bell PA, 19422  
215-646-2900

**Marketing Agreement Proposal**

Provided by Jane Douglass, REALTOR, Berkshire Hathaway HomeServices, Fox & Roach, REALTORS

Property: Ingersoll Estate, Bethlehem Pike, Lower Gwynedd Township  
Seller / Owner: Lower Gwynedd Township

Purpose: pre-market the Property before Auction. No Exclusive Listing Agreement exists; the proposal is strictly for Marketing efforts only, not to list and sell the Property..

Outline:

- Jane Douglass to be hired for Marketing only, to advertise the property prior to going to auction
- Length of Marketing Agreement is 12 months / 366 days from the execution date of the formal Marketing Agreement
- Compensation - sliding scale with a maximum total amount of \$29,000. \$15,000 to be paid in the first 30 days; balance to be paid based on final auction price. Final balance due at property closing from auction. See table for fee schedule:

Sales price range	Marketing fee owed
\$0 - \$300,000	\$15,000 minimum, due within 30 days of JD / LGT signed Marketing Agreement
\$300,001 - \$400,000	\$20,000 (\$5000 balance due)
\$400,001 - \$500,000	\$25,000 (\$10,000 balance due)
\$500,001 - \$600,000	\$27,000 (\$12,000 balance due)
\$600,001 and above	\$29,000 (\$14,000 balance due)

- If the Marketing Agreement is extended beyond 366 days, additional compensation/ fees and payment schedule will be discussed and agreed upon by a written agreement between Jane Douglass and Lower Gwynedd Twp, The extension will be for a minimum of 6 months.

- Compensation minimum of \$15,000 will be paid regardless of whether the subsequent planned auction occurs, or if the subsequent auction is successful or not.
- If the auction occurs at any time prior to the end of the 12 month agreement, any remaining payment/balance is due in full after property closing from auction.
  
- Marketing Channels include:
  - Social media
  - Historical Society / vintage home websites and directories
  - direct outreach to historical societies
  - professional photography
  - printed color brochures
  - property information (historical) and local insights (info binder at location)
  - tour property with interested parties
  - advertising outreach throughout local networks - real estate and other
  - communication with township regarding interested buyers (to trigger auction phase)

Jane Douglass may refer auction companies to the Township to be used for the auction of the Property.

We respectfully request that the Township Solicitors provide a written proposal that would include all of the above, as well as terms for ending the Agreement prematurely, for both parties.

Thank you for your consideration,

*Jane Douglass*

Jane Douglass, REALTOR  
[janedouglass43@gmail.com](mailto:janedouglass43@gmail.com)  
215-850-2120 mobile

## MEMORANDUM

**TO:** Ms. Mimi Gleason, Lower Gwynedd Township

**FROM:** Chad Dixson, AICP  
Stephanie L. Butler, P.E.

**CC:** Ms. Jamie Worman, Lower Gwynedd Township  
Michelle Eve, P.E.

**DATE:** January 18, 2024

**RE: **Spring House Phase 2 Roadway Improvement Project Contract Extension Summary****  
Lower Gwynedd Township, Montgomery County, PA  
Bowman Project No. 310088-01-001

This document includes a summary of the project specific items related to the construction contract extension (attached).

1. J.D. Morrissey (JDM) submitted a contract extension request to Bowman for review and consideration.

**Reason:** This request is being submitted as a result of the delayed PECO and Verizon pole relocation work that also impacted multiple other utilities for line relocations causing a shutdown of the roadway project work.

As of January 12, 2024, the remaining utility relocation work includes relocation of 2 Verizon poles (#49 and 50), and splicing of Verizon lines at Pole #8852 (removing copper and installing fiber). This work is scheduled for week of January 15<sup>th</sup>. **As of January 18<sup>th</sup>, the status of this work is underway. Verizon anticipates the splicing work to be completed no later than the end of February due to complexity and age of the lines. Line relocations on Sumneytown Pike will be prioritized so that JDM can start on that segment while splicing is completed.** It is noted that both PECO and Verizon will need to pull their poles once all lines are relocated.

2. Bowman reviewed the overall schedule and utility delays and recommends extending the contract by 199 days **through August 28, 2024.**

**Provide the Dates for the delay:** The project was delayed 139 days for the aerial relocation work, which is shown on the provided construction schedule. We also recommend adding 60 days to the delay for the potential unforeseen weather delays during January and February, which totals 199 days. James D. Morrissey, Inc. (JDM) performed all possible construction to this point, but they could not



perform the roadway widening and associated improvements until the utility poles and associated lines were relocated.

**Anticipated Project Construction End Date:** July 31, 2024

**Anticipated De-Mobilization/Project Completion:** August 28, 2024

**Contract End Date:** August 28, 2024

3. Bowman has discussed the need for the construction work to start ***as soon as possible*** once the utility relocations are complete. Chris Hook from JDM understands this requirement and has confirmed that they are preparing to mobilize crews. They are following up daily with Verizon regarding the remaining pole relocations (2), splicing, and pole removal.
4. Bowman has reiterated to JDM that the ***project must be complete by the start of the 2024/2025 school year which is August 26, 2024***. Chris Hook (JDM) has stated that should not be a concern as they are planning to have all construction activities completed by July 31 at the latest based on the current schedule. If conditions allow, work will be expedited with multiple crews.
5. ***PennDOT MTF grant is extended through November 12, 2024***. All project related construction must be completed, and grant reimbursement requests will be submitted in accordance with the grant requirements.

If you have any questions on the contract extension, please contact Stephanie L. Butler, P.E. at (215) 283-9444, ext. 1256 or [sbutler@bowman.com](mailto:sbutler@bowman.com).

MEE/SLB

Q:\PA-FTWA-MC\MCM\eng\LOWERGWI\815182.2A Springhouse Phase 2\Const\_Services\11\_Correspondence\Contract Time Extension\2021-01-18 Spring House Phase 2 Contract Extension Summary for BOS meeting



PROJECT	WORK PERFORMED LAST PERIOD (December 1 <sup>st</sup> to January 23 <sup>rd</sup> )	WORK TO BE PERFORMED THIS PERIOD (January 23 <sup>rd</sup> to February 27 <sup>th</sup> )
<b>GENERAL TOWNSHIP PROJECTS</b>		
1. NPDES – MS4 Reporting	<ul style="list-style-type: none"> <li>No work performed this period.</li> </ul>	<ul style="list-style-type: none"> <li>Monitor project status and perform work as necessary.</li> </ul>
2. Misc. Consulting Services	<ul style="list-style-type: none"> <li>Coordination with EC Fence on contract and pre-construction items for Ingersoll Park fence/netting upgrades.</li> <li>Pre-Construction meeting for Ingersoll fencing project on 1/12.</li> <li>Demolition and construction are underway for the Ingersoll fence project.</li> <li>Continue work on stormwater strategic plan.</li> </ul>	<ul style="list-style-type: none"> <li>Construction observation and coordination re: Ingersoll fence project. Anticipated completion by Mid-March 2024.</li> <li>Anticipate BOS discussion re: stormwater strategic plan in February / March timeframe.</li> </ul>
3. Old Bethlehem Pike Bridge Replacement / Streambank Stabilization	<ul style="list-style-type: none"> <li>Work to finalize project specs and coordinate with utilities.</li> <li>BOS authorized project for bid advertisement at Jan 2<sup>nd</sup> meeting.</li> </ul>	<ul style="list-style-type: none"> <li>Work towards finalizing specs / utility coordination in spring 2024, bid mid-2024 with construction to begin Q3/Q4 2024.</li> </ul>
4. Bethlehem Pike Pedestrian Bridges (Montco 2040 Grant)	<ul style="list-style-type: none"> <li>Project awarded at November BOS meeting.</li> <li>PennDOT and DEP permits submitted, comments received and revised permit plans will be submitted by end of January.</li> </ul>	<ul style="list-style-type: none"> <li>Submit PennDOT HOP for review.</li> <li>BOS has authorized bid. Finalize specs and put out to bid.</li> <li>Project goal is award at November 28<sup>th</sup> BOS meeting.</li> </ul>
5. Road Repaving Program	<ul style="list-style-type: none"> <li>No work completed this period.</li> </ul>	<ul style="list-style-type: none"> <li>Work on specs and bid for 2024 paving program. Anticipate request to advertise at February 13<sup>th</sup> BOS with bid in March and award early April.</li> </ul>
6. Pen-Ambler Park	<ul style="list-style-type: none"> <li>No work completed this period.</li> </ul>	<ul style="list-style-type: none"> <li>Work with Staff &amp; consultant on ACT 2 closeout.</li> </ul>

<b>PROJECT</b>	<b>WORK PERFORMED LAST PERIOD</b> (December 1 <sup>st</sup> to January 23 <sup>rd</sup> )	<b>WORK TO BE PERFORMED THIS PERIOD</b> (January 23 <sup>rd</sup> to February 27 <sup>th</sup> )
7. Park Master Plans (Ingersoll, Pen-Ambler, Oxford) DCED Grant.	<ul style="list-style-type: none"> <li>• Phasing and funding recommendations discussed with Staff.</li> <li>• Phasing and funding was scheduled to be discussed at P&amp;R Board on 1/16 but the meeting was canceled due to inclement weather. Information to be distributed to P&amp;R board for comment.</li> <li>• Additional survey of Pen-Ambler Road for trail is complete.</li> </ul>	<ul style="list-style-type: none"> <li>• Anticipate phasing and funding discussion with BOS in February.</li> <li>• Revise Pen-Ambler / SEPTA trail alignment per results of additional field survey.</li> <li>• Montco 2040 grant may be good fit for one of the park projects. The applications are due March 1, 2024.</li> </ul>
<b>PRIVATE DEVELOPMENT PROJECTS</b>		
1. Saint Charles Seminary	<ul style="list-style-type: none"> <li>• Construction Observation.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as needed.</li> </ul>
2. Precision Watches	<ul style="list-style-type: none"> <li>• Construction Observation.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as needed.</li> </ul>
3. Hunt Seat Drive	<ul style="list-style-type: none"> <li>• No work performed this period.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as needed.</li> </ul>
4. Overlook at Gwynedd (WB Homes off Route 202)	<ul style="list-style-type: none"> <li>• No work performed this period.</li> </ul>	<ul style="list-style-type: none"> <li>• Project is in the 18-month maintenance period.</li> </ul>
5. 1323 Gypsy Hill Road (Gypsy Way – DeSantis)	<ul style="list-style-type: none"> <li>• No work performed this period.</li> </ul>	<ul style="list-style-type: none"> <li>• Project is in 18-month maintenance period.</li> </ul>
6. Goddard School	<ul style="list-style-type: none"> <li>• No work performed this period.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as needed.</li> </ul>
7. Gwynedd Mercy Academy High School	<ul style="list-style-type: none"> <li>• Construction observation.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as needed.</li> </ul>
8. GMU – Tri-Plex Building Courtyard Improvements	<ul style="list-style-type: none"> <li>• Construction observation.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as needed.</li> </ul>
9. GMU – Healthcare Innovation Campus	<ul style="list-style-type: none"> <li>• Project received conditional recommendation for approval from the PC at their 1/17.</li> </ul>	<ul style="list-style-type: none"> <li>• Anticipate project presentation at BOS meeting in February.</li> </ul>

<b>PROJECT</b>	<b>WORK PERFORMED LAST PERIOD</b> (December 1 <sup>st</sup> to January 23 <sup>rd</sup> )	<b>WORK TO BE PERFORMED THIS PERIOD</b> (January 23 <sup>rd</sup> to February 27 <sup>th</sup> )
10. SHIP Building 14 Parking & Substation Land Development	<ul style="list-style-type: none"> <li>• Construction underway electrical substation project.</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor project status and perform work as necessary.</li> </ul>
11. 776 Johns Lane (Hughes Subdivision)	<ul style="list-style-type: none"> <li>• No work performed this period.</li> </ul>	<ul style="list-style-type: none"> <li>• Lots were sold. Anticipate pre-construction meeting</li> </ul>

## LOWER GWYNEDD TOWNSHIP PROJECT STATUS REPORT January 2024

### DESIGN PROJECTS

#### **SPRING HOUSE INTERSECTION PROJECT – PHASE 2**

- Project information and notices to be maintained on the Township website.
- Bid award approved by BOS 3/22/2023.
- Notice To Proceed given 4/17/2023.
- Underground stormwater basin has been installed.
- Some stormwater facilities have been installed; coordinating with contractor regarding the stormwater facility to be installed along Norristown Road.
- Mast arm pole installation started 11/16/2023. Installation completed for traffic signal mast arm pole on southwest corner of intersection and lane control mast arm pole on Norristown Road. Additional mast arm pole installation required as project progresses.
- Construction progress meeting held 1/18/2024.
- Utility coordination ongoing for relocations. The remaining utility relocation work includes the relocation of two Verizon poles (#49 and #50), and splicing of Verizon lines at (Pole #8852); for removing copper and installing fiber. This work was started on 1/16/2024. Verizon estimates the splicing work will be completed no later than end of February due to the complexity and age of the lines. Line relocations on Sumneytown Pike will be prioritized so JDM can start construction activity on that segment while splicing is completed. Following the splicing and pole relocation, the final step will be to pull the old poles.
- Contractor has requested a construction contract extension, as a result of the delayed PECO and Verizon pole relocation work.
- Bowman has emphasized to the contractor that the construction work must resume as soon as possible once the utility relocations are complete.
- Bowman has reiterated to the contractor that the project must be completed prior to the start of the 2024-2025 school year, which is August 26, 2024.
- Next construction progress meeting scheduled for 2/15/2024.

### TRAFFIC SIGNAL PROJECTS

#### **DAGER ROAD PEDESTRIAN CROSSING**

- Improvements funded by Montco 2040 grant to realign existing midblock crossing and install Rectangular Rapid Flashing Beacon (RRFB).
- Pole and pedestrian flasher installation, trail approach modifications, and final pavement markings and signs completed.

**LOWER GWYNEDD TOWNSHIP**  
**PROJECT STATUS REPORT**  
**January 2024**

- Final inspection with PennDOT held on 12/1/2023. Contractor is completing punch list items for the pedestrian flashers.

**PENLLYN PIKE AND TREWELLYN AVENUE/OLD PENLLYN PIKE TRAFFIC SIGNAL UPGRADES**

- Traffic signal modernization improvement project.
- DCED LSA – Statewide grant application submitted 11/30/2023.

**WELSH ROAD TRAFFIC SIGNAL UPGRADES**

- Traffic signal upgrades for the intersections with Evans Road and Darden Drive/Gwynedd Crossing.
- Township plans to submit PennDOT Green Light Go (GLG) application. Pre-application scoping form submitted to PennDOT for review 12/15/2023. PennDOT comments due to Township by 1/31/2024. Grant application due 2/29/2024.

**McKEAN ROAD PEDESTRIAN IMPROVEMENTS (BEACON PROPERTIES)**

- Pedestrian crossing improvements at Stone House Road and Ambler Area YMCA and speed display signs completed by Beacon Properties.
- Beacon contractor has completed all final punch list items.

**NORRISTOWN ROAD/TENNIS AVENUE TRAFFIC SIGNAL UPGRADES**

- Improvements funded by PennDOT Green Light Go (GLG) grant to upgrade traffic and pedestrian signal equipment and ADA ramp upgrades.
- All final punch list items completed.

**TRAFFIC PROJECTS**

**SUMNEYTOWN PIKE ENGINE BRAKE RETARDER RESTRICTION STUDY**

- Traffic study to determine if PA Vehicle Code criteria are satisfied to prohibit engine brake retarders between Swedesford Road and Bethlehem Pike.
- Montgomery County approved restriction between Swedesford Road and US 202. Restriction criteria not met between US 202 and Bethlehem Pike. Ordinance adoption tentatively planned for Spring 2024. Restriction signs will be posted after ordinance adoption.



1130 N. BETHLEHEM PIKE • P.O. BOX 625 • SPRING HOUSE, PA 19477-0625 • 215-646-5302 • FAX 215-646-3357

[www.lowergwynedd.org](http://www.lowergwynedd.org)

## Finance Memorandum

Date: January 18, 2024  
To: Mimi Gleason, Township Manager  
From: Melinda Haldeman, CPA Finance Director *MH*

RE: December Preliminary 2023 LGT Financial Packet:  
❖ Fund and Cash Balances as of December 31, 2023  
❖ YTD Budget Report with Prior Years Actuals thru December 31, 2023

NOTE: The December Financial Packet is Preliminary. At year end the books are kept "open" to make sure we capture all 2023 expenses and revenues in the 2023 year. Invoices we receive through January and early February that pertain to work done in 2023 are recorded in 2023 as Accounts Payable. Revenues received in January, which are for 2023 are recorded in 2023 as Accounts Receivable. This accrual process only occurs at year end for Municipalities to ensure that revenues and expenses are properly reported in the correct year.

### The following are items I wish to bring to your attention:

- All cash account reconciliations are current through December 31, 2023.
- Sewer Account Receivable is reconciled through December 31, 2023.
- All ARPA monies must be obligated by December 31, 2024, and paid out as of December 31, 2026. The current amount left to spend as of December 31, 2023, is \$495,289.36.
- All budgeted 2023 Transfers have been made except for \$203,120 transfer from Capital Reserve to Stormwater Fund. This transfer will occur when we receive the Grant, in the same amount, for the Streambank Restoration Project Grant and the Brookside Dam Study Grant.
- Surplus for General Funds through December 31, 2023, is \$472,676.34.



**FUND BALANCE  
AND  
CASH BALANCE**



**Lower Gwynedd Township**  
**Fund and Cash Balances as of December 31, 2023**  
**Preliminary**

FUND #	FUND	FUND BALANCE @ 01/01/2023	(INCREASE)DECREASE THRU DEC 2023	FUND BALANCE @ 12/31/2023
01	GENERAL	-7,681,781.25	-464,603.49	-8,146,384.74
02	STREET LIGHT	-26,415.45	-3,345.27	-29,760.72
03	FIRE PROTECTION	-30,840.80	-29,405.02	-60,245.82
04	FIRE HYDRANT	-65,930.77	6,722.84	-59,207.93
05	RECREATION	1,749.23	17,954.60	19,703.83
	GENERAL OPERATING FUNDS SURPLUS	-7,803,219.04	-472,676.34	-8,275,895.38
08	SEWER OP	-5,703,742.57	-338,396.99	-6,042,139.56
09	SEWER CAPITAL	-3,690,003.56	-682,345.73	-4,372,349.29
	SEWER FUNDS SURPLUS	-9,393,746.13	-1,020,742.72	-10,414,488.85
16	ACQ OPEN SPACE	-2,141,541.30	-109,329.54	-2,250,870.84
30	CAPITAL RESERVE	-3,686,885.19	-675,684.64	-4,362,569.83
31	STORMWATER MNGMNT	-574,856.92	-221,000.14	-795,857.06
33	TRAFFIC IMPACT	-1,691,266.66	-128,588.95	-1,819,855.61
35	HIGHWAY AID	-271,125.34	-129,446.38	-400,571.72
	CAPITAL FUNDS	-8,365,675.41	-1,264,049.65	-9,629,725.06

Cash Balance Total @ 12/31/2023	
\$ 7,214,035.04	
\$ 29,840.34	
\$ 63,078.03	
\$ 59,790.06	
\$ 7,490.57	
\$ 7,374,234.04	TOTAL CASH OPERATING FUNDS
\$ 2,739,481.89	
\$ 4,375,656.79	
\$ 7,115,138.68	TOTAL CASH SEWER FUNDS
\$ 2,250,870.84	
\$ 5,090,937.28	Includes ARPA Funds
\$ 795,944.39	
\$ 1,825,179.96	
\$ 400,571.72	
\$ 10,363,504.19	TOTAL CASH CAPITAL FUNDS

NOTE: REVENUE AND FUND BALANCES ARE NORMALLY A (CREDIT) BALANCE. THIS IS DEPICTED IN (PARENTHESES) OR A DASH BEFORE NUMBER  
NEGATIVE BALANCES ARE DEPICTED IN RED

FUND BALANCE: THE FUND BALANCE IS THE CULMINATION OF INCOME NETTED AGAINST EXPENSES  
FROM THE INCEPTION OF THE FUND. WHEN (REVENUE) EXCEEDS EXPENSES, THE FUND BALANCE  
WILL BE A (CREDIT).

**YTD BUDGET REPORT WITH ACTUALS  
2020/2021/2022/2023**

01/18/2024  
12:16:11

Lower Gwynedd Township  
YTD BUDGET REPORT WITH PRIOR YEARS THRU  
(PRELIMINARY) DEC 2020/2021/2022/2023  
FOR PERIOD 12 OF 2023

PAGE 1  
glactrpt

ACCOUNTS FOR: 01 GENERAL FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
301 REAL ESTATE TAXES	-1,035,531.44	-1,051,252.20	-1,064,809.56	-1,065,317.62	-1,069,000.00
310 LOCAL TAX ACT 511	-7,010,224.82	-7,036,829.60	-8,136,800.97	-6,936,238.13	-7,160,000.00
321 BUSINESS LICENSES & PRMTS	-315,703.88	-313,647.99	-306,556.80	-305,868.21	-295,650.00
322 NON-BUSINESS LICENSE/PRMT	-15,510.00	-11,595.00	-15,690.00	-15,930.00	-12,000.00
331 FINES	-11,040.26	-12,686.75	-9,405.82	-11,450.54	-12,000.00
341 INTEREST EARNINGS	-27,016.56	-7,138.51	-75,510.18	-307,629.61	-84,000.00
342 RENTS & ROYALTIES	-254,100.83	-260,537.04	-268,353.11	-275,162.73	-275,163.00
354 ST. CAPITAL & OP. GRANTS	.00	.00	.00	-753.10	-2,500.00
355 STATE SHARED REV & ENTLMT	-410,478.22	-373,009.82	-426,781.19	-486,111.20	-443,805.00
358 LOCAL GOVT ENTITLEMENT	.00	-20,219.76	-24,290.85	.00	-24,300.00
361 DEPT EARNINGS-GEN GOVT	-60,474.49	-53,477.34	-55,455.08	-50,459.86	-36,000.00
362 DEPT EARNGS-PUBLIC SAFETY	-584,042.62	-664,594.93	-688,506.16	-666,575.15	-583,870.00
363 DEPT EARNGS-HGHWYS & STS	-3,720.00	-3,810.00	-3,900.00	-3,990.00	-3,900.00
380 MISCELLANEOUS REVENUE	-970.65	-4,021.15	-2,238.34	-23,625.49	-2,500.00
387 CONTRIBUTIONS & DONATIONS	-16,328.00	-73,710.64	-25,097.14	-16,441.00	-38,250.00
392 INTERFUND OPERATING TRANS	-46,519.93	-44,455.46	-4,164.00	-7,877.00	-7,877.00
395 REFUNDS OF PRIOR YR EXPEN	-2,155.00	.00	-7,400.00	.00	.00
400 GEN GOVT-LEGISLATIVE BODY	141,034.57	145,909.40	160,552.05	181,497.75	173,467.00
401 GEN GOVT-EXECUTIVE	401,884.28	396,222.63	460,612.90	377,260.62	361,439.00
402 GEN GOVT-FINANCIAL ADMIN	247,089.57	270,109.28	287,645.29	408,597.08	340,730.00
403 GEN GOVT-TAX COLLECTION	104,313.40	101,630.08	106,378.18	106,063.69	105,110.00
404 GEN GOVT-LAW	82,996.94	86,841.32	135,959.43	222,864.26	120,175.00
408 GEN GOVT-ENGINEER	53,175.86	126,542.73	134,062.79	110,984.06	135,000.00
409 GEN GOVT-BUILDNGS & PLANT	186,014.79	273,768.83	275,149.84	251,010.96	278,156.00
410 GEN GOVT-POLICE	3,361,765.91	3,434,240.04	3,846,048.65	4,340,608.80	4,198,595.00
411 GEN GOVT-FIRE	121,368.02	109,891.47	137,473.44	134,431.76	137,473.00
412 AMBULANCE	18,896.00	33,896.00	30,000.00	30,000.00	30,000.00
413 GEN GOVT-CODE ENFORCEMENT	16,108.87	30,945.47	32,712.50	18,601.75	34,200.00
414 GEN GOVT-PLANING & ZONING	498,961.29	558,625.79	473,210.89	475,608.59	639,625.00
415 GEN GOVT-EMERGNCY MANGMNT	.00	.00	.00	.00	700.00
427 SANITATN-SOLID WASTE DISP	.00	7,002.92	5,700.00	6,850.00	8,000.00
429 PUBLIC WORKS-WASTEWTR COLL	1,297.25	1,809.74	1,341.40	.00	.00
430 PUB WORKS-HIGHWAY RDS STS	626,851.85	604,557.61	537,762.04	613,890.33	735,038.00
431 CLEANING STREETS & GUTTER	3,840.00	7,861.63	4,964.70	13,976.55	10,000.00
432 PUBLIC WORKS-SNOW/ICE REMV	14,246.57	60,684.36	32,503.30	6,749.99	48,000.00
433 PUBLIC WORKS-TRAFFIC	26,612.43	14,528.59	50,391.88	82,236.70	34,000.00
434 PUBLIC WORKS-STREET LGHTNG	1,873.82	4,086.65	2,750.51	2,107.13	3,700.00
436 MAINTENANCE STORM SEWERS	17,295.11	11,552.47	8,011.61	12,953.64	17,500.00
437 PUBLIC WORKS-REPR TOOL&MAC	74,633.98	88,967.02	88,174.69	95,725.67	77,184.00
438 PUBLIC WORKS-HIGHWAY MAINT	5,641.21	16,861.81	3,773.51	4,592.72	15,500.00
461 OPEN SPACE CONSERVATION	3,193.40	4,527.95	17,468.95	10,931.06	20,000.00
486 INSURANCE	183,590.11	181,560.09	58,364.69	70,167.07	62,538.00
487 EMPLOYEE BENEFITS	48,005.06	43,303.71	71,877.39	99,680.48	87,303.00
491 REFUND PRIOR YEAR REVENUES	18,661.79	2,280.30	-248.66	.00	2,000.00

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ACCOUNTS FOR: 01 GENERAL FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
492 INTERFUND OPERATING TRANS	2,104,205.66	1,538,159.00	2,137,555.66	2,031,435.49	1,983,161.00
TOTAL GENERAL FUND	-1,430,258.96	-1,774,619.30	-2,014,761.57	-464,603.49	-392,221.00
TOTAL REVENUES	-9,793,816.70	-9,930,986.19	-11,114,959.20	-10,173,429.64	-10,050,815.00
TOTAL EXPENSES	8,363,557.74	8,156,366.89	9,100,197.63	9,708,826.15	9,658,594.00
TOTAL 01 GENERAL FUND	-1,430,258.96	-1,774,619.30	-2,014,761.57	-464,603.49	-392,221.00

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ACCOUNTS FOR: 02 STREET LIGHT FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR. ACTUALS	CY REV BUDGET
301 REAL ESTATE TAXES	-16,520.67	-16,196.12	-16,514.53	-17,989.63	-16,800.00
341 INTEREST EARNINGS	-279.80	-16.36	-382.76	-1,264.62	-500.00
434 PUBLIC WORKS-STREET LGHTNG	8,624.00	45,218.39	14,101.41	15,908.98	13,781.00
TOTAL STREET LIGHT FUND	-8,176.47	29,005.91	-2,795.88	-3,345.27	-3,519.00
TOTAL REVENUES	-16,800.47	-16,212.48	-16,897.29	-19,254.25	-17,300.00
TOTAL EXPENSES	8,624.00	45,218.39	14,101.41	15,908.98	13,781.00
TOTAL 02 STREET LIGHT FUND	-8,176.47	29,005.91	-2,795.88	-3,345.27	-3,519.00

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ACCOUNTS FOR: 03 FIRE PROTECTION FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
301 REAL ESTATE TAXES	-196,095.97	-191,943.05	-198,625.63	-200,467.75	-200,100.00
341 INTEREST EARNINGS	-332.14	-32.88	-2,302.81	-5,953.04	-2,400.00
392 INTERFUND OPERATING TRANS	-165,000.00	-165,000.00	-165,000.00	-165,000.00	-165,000.00
480 MISC EXPENDITURES	195,070.66	191,971.29	184,663.46	200,894.77	202,500.00
489 OTHER MISCELLANEOUS EXPENDITUR	165,000.00	165,000.00	159,751.04	141,121.00	165,000.00
TOTAL FIRE PROTECTION FUND	-1,357.45	-4.64	-21,513.94	-29,405.02	.00
TOTAL REVENUES	-361,428.11	-356,975.93	-365,928.44	-371,420.79	-367,500.00
TOTAL EXPENSES	360,070.66	356,971.29	344,414.50	342,015.77	367,500.00
TOTAL 03 FIRE PROTECTION FUND	-1,357.45	-4.64	-21,513.94	-29,405.02	.00

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ACCOUNTS FOR: 04 FIRE HYDRANT FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
301 REAL ESTATE TAXES	-40,170.02	-39,321.64	-39,815.48	-39,544.67	-41,200.00
341 INTEREST EARNINGS	-393.20	-23.64	-1,084.35	-3,130.36	-1,200.00
411 GEN GOVT-FIRE	41,449.72	41,449.72	42,276.07	49,397.87	42,700.00
TOTAL FIRE HYDRANT FUND	886.50	2,104.44	1,376.24	6,722.84	300.00
TOTAL REVENUES	-40,563.22	-39,345.28	-40,899.83	-42,675.03	-42,400.00
TOTAL EXPENSES	41,449.72	41,449.72	42,276.07	49,397.87	42,700.00
TOTAL 04 FIRE HYDRANT FUND	886.50	2,104.44	1,376.24	6,722.84	300.00

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ACCOUNTS FOR: 05 RECREATION FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
301 REAL ESTATE TAXES	-382,641.05	-374,559.11	-387,729.61	-391,324.98	-391,500.00
341 INTEREST EARNINGS	-1,904.37	-150.04	-3,389.55	-11,451.21	-4,200.00
361 DEPT EARNINGS-GEN GOVT	-1,000.00	-5,500.00	-25,871.00	-17,972.75	-24,340.00
367 DEPT EARNINGS-CULTURE REC	-5,773.00	-9,813.00	-18,592.00	-41,020.00	-44,200.00
387 CONTRIBUTIONS & DONATIONS	-502.00	-135.00	-841.93	-601.00	-100.00
392 INTERFUND OPERATING TRANS	-100,000.00	.00	.00	-200,000.00	-200,000.00
437 PUBLIC WORKS-REPR TOOL&MAC	5,019.29	7,659.54	13,657.45	10,872.81	12,000.00
451 CULTURE-RECREATION ADMIN	110,282.31	115,917.09	119,833.92	157,722.33	148,406.00
452 PARTICIPANT RECREATION	.00	.00	.00	7,030.41	14,662.00
453 RECREATION EVENTS	1,482.00	9,327.60	15,900.03	14,569.46	19,500.00
454 PARKS	314,033.98	352,353.93	391,545.53	432,866.54	410,948.00
456 YOUTH PROGRAMS	.00	.00	.00	.00	1,100.00
459 ADULT PROGRAMS	972.00	.00	.00	1,215.00	1,500.00
486 INSURANCE	14,565.92	12,045.92	4,222.36	13,510.12	14,893.00
487 EMPLOYEE BENEFITS	35,575.62	33,772.79	31,576.71	42,537.87	30,571.00
TOTAL RECREATION FUND	-9,889.30	140,919.72	140,311.91	17,954.60	-10,760.00
TOTAL REVENUES	-491,820.42	-390,157.15	-436,424.09	-662,369.94	-664,340.00
TOTAL EXPENSES	481,931.12	531,076.87	576,736.00	680,324.54	653,580.00
TOTAL 05 RECREATION FUND	-9,889.30	140,919.72	140,311.91	17,954.60	-10,760.00



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ACCOUNTS FOR: 08 SEWER FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
341 INTEREST EARNINGS	-16,324.14	-865.50	-24,230.61	-68,769.66	-35,000.00
361 DEPT EARNINGS-GEN GOVT	-214.25	-321.45	-236.66	-50.00	-900.00
364 DEPT EARNGS-SANITATION	-2,710,864.03	-2,731,318.58	-2,675,845.57	-2,762,542.35	-2,867,268.00
383 SPECIAL ASSESSMENTS	-844.53	-1,140.04	.00	-900.00	-1,000.00
402 GEN GOVT-FINANCIAL ADMIN	16,119.75	19,891.46	15,815.52	17,525.22	20,000.00
404 GEN GOVT-LAW	2,242.50	14,759.19	7,014.79	-1,610.76	15,000.00
408 GEN GOVT-ENGINEER	27,541.68	12,821.83	3,841.06	4,000.00	30,000.00
409 GEN GOVT-BUILDNGS & PLANT	118,694.00	121,068.00	124,700.00	127,200.00	127,200.00
429 PUBLIC WORKS-WASTEWTR COLL	1,585,686.68	1,703,375.62	1,526,772.36	1,625,760.53	1,865,450.00
486 INSURANCE	8,751.44	8,242.96	3,870.60	1,685.32	1,318.00
487 EMPLOYEE BENEFITS	119,040.40	112,470.83	104,609.41	111,427.71	115,513.00
492 INTERFUND OPERATING TRANS	646,513.00	644,307.00	604,164.00	607,877.00	607,877.00
TOTAL SEWER FUND	-203,657.50	-96,708.68	-309,525.10	-338,396.99	-121,810.00
TOTAL REVENUES	-2,728,246.95	-2,733,645.57	-2,700,312.84	-2,832,262.01	-2,904,168.00
TOTAL EXPENSES	2,524,589.45	2,636,936.89	2,390,787.74	2,493,865.02	2,782,358.00
TOTAL 08 SEWER FUND	-203,657.50	-96,708.68	-309,525.10	-338,396.99	-121,810.00

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ACCOUNTS FOR: 09 SEWER CAPITAL RESERVE	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
341 INTEREST EARNINGS	-13,542.18	-1,298.95	-63,737.50	-196,468.21	-84,000.00
391 FIXED ASSETS PROCEEDS	.00	.00	-22,500.00	.00	.00
392 INTERFUND OPERATING TRANS	-600,000.00	-600,000.00	-600,000.00	-600,000.00	-600,000.00
409 GEN GOVT-BUILDNGS & PLANT	.00	5,378.50	9,149.75	.00	12,500.00
429 PUBLK WORKS-WASTEWTR COLL	.00	94,252.00	28,131.99	35,781.00	70,000.00
439 CONSTRUCTION & REBUILDING	17,940.00	70,985.16	114,380.80	78,341.48	542,000.00
TOTAL SEWER CAPITAL RESERVE	-595,602.18	-430,683.29	-534,574.96	-682,345.73	-59,500.00
TOTAL REVENUES	-613,542.18	-601,298.95	-686,237.50	-796,468.21	-684,000.00
TOTAL EXPENSES	17,940.00	170,615.66	151,662.54	114,122.48	624,500.00
TOTAL 09 SEWER CAPITAL RESERVE	-595,602.18	-430,683.29	-534,574.96	-682,345.73	-59,500.00

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ACCOUNTS FOR:	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
16 ACQUISITION OF OPEN SPAC					
341 INTEREST EARNINGS	-7,234.72	-678.94	-35,078.89	-113,792.52	-48,000.00
342 RENTS & ROYALTIES	-10,237.50	-20,525.00	-6,500.00	.00	.00
387 CONTRIBUTIONS & DONATIONS	-5,320.00	.00	.00	.00	.00
408 GEN GOVT-ENGINEER	14,431.70	23,210.00	.00	.00	.00
454 PARKS	586,468.16	180,593.27	15,589.76	4,462.98	65,000.00
TOTAL ACQUISITION OF OPEN SPAC	578,107.64	182,599.33	-25,989.13	-109,329.54	17,000.00
TOTAL REVENUES	-22,792.22	-21,203.94	-41,578.89	-113,792.52	-48,000.00
TOTAL EXPENSES	600,899.86	203,803.27	15,589.76	4,462.98	65,000.00
TOTAL 16 ACQUISITION OF OPEN SPAC	578,107.64	182,599.33	-25,989.13	-109,329.54	17,000.00

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ACCOUNTS FOR: 30 CAPITAL RESERVE FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
341 INTEREST EARNINGS	-30,320.57	-7,898.46	-80,407.94	-232,291.65	-100,000.00
351 FEDERAL GRANTS	.00	.00	.00	-776,604.97	.00
354 ST. CAPITAL & OP. GRANTS	.00	.00	.00	-14,053.00	-203,120.00
391 FIXED ASSETS PROCEEDS	-14,200.00	.00	-24,687.00	.00	-25,000.00
392 INTERFUND OPERATING TRANS	-1,000,000.00	-500,000.00	-725,000.00	-600,000.00	-600,000.00
401 GEN GOVT-EXECUTIVE	6,553.92	.00	.00	539,456.97	1,092,852.00
407 DATA PROCESSING	14,374.34	16,165.49	5,926.78	5,720.00	14,100.00
409 GEN GOVT-BUILDNGS & PLANT	4,600.00	363,086.97	131,837.85	22,346.29	125,000.00
410 GEN GOVT-POLICE	58,651.93	127,147.05	41,799.86	142,087.80	204,000.00
411 GEN GOVT-FIRE	.00	100,000.00	300,000.00	.00	.00
430 PUB WORKS-HIGHWAY RDS STS	.00	79,426.30	.00	35,781.00	113,000.00
439 CONSTRUCTION & REBUILDING	413,860.92	121,073.30	108,528.42	60,037.64	584,000.00
454 PARKS	26,530.30	204,465.24	138,065.14	108,180.28	589,000.00
492 INTERFUND OPERATING TRANS	282,100.00	.00	.00	33,655.00	203,120.00
TOTAL CAPITAL RESERVE FUND	-237,849.16	503,465.89	-103,936.89	-675,684.64	1,996,952.00
TOTAL REVENUES	-1,044,520.57	-507,898.46	-830,094.94	-1,622,949.62	-928,120.00
TOTAL EXPENSES	806,671.41	1,011,364.35	726,158.05	947,264.98	2,925,072.00
TOTAL 30 CAPITAL RESERVE FUND	-237,849.16	503,465.89	-103,936.89	-675,684.64	1,996,952.00

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ACCOUNTS FOR:	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
31 STORMWATER MANAGEMENT					
341 INTEREST EARNINGS	-1.57	-166.51	-5,463.63	-17,894.40	-7,200.00
354 ST. CAPITAL & OP. GRANTS	.00	.00	-4,500.00	-44,200.00	.00
387 CONTRIBUTIONS & DONATIONS	-20,560.00	-7,166.50	-330,853.50	-234,074.00	-451,500.00
392 INTERFUND OPERATING TRANS	-382,100.00	.00	.00	.00	-203,120.00
446 STORMWATER MANAGEMENT	50,967.27	41,409.33	83,578.19	75,168.26	448,500.00
TOTAL STORMWATER MANAGEMENT	-351,694.30	34,076.32	-257,238.94	-221,000.14	-213,320.00
TOTAL REVENUES	-402,661.57	-7,333.01	-340,817.13	-296,168.40	-661,820.00
TOTAL EXPENSES	50,967.27	41,409.33	83,578.19	75,168.26	448,500.00
TOTAL 31 STORMWATER MANAGEMENT	-351,694.30	34,076.32	-257,238.94	-221,000.14	-213,320.00

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ACCOUNTS FOR: 33	TRAFFIC IMPACT FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
341	INTEREST EARNINGS	-4,144.02	-546.18	-24,005.21	-82,140.59	-36,000.00
354	ST. CAPITAL & OP. GRANTS	-236,950.38	-635,483.62	2,417.50	.00	-2,394,351.00
357	LOCAL GOVERNMENT GRANT	.00	.00	.00	.00	-45,000.00
361	DEPT EARNINGS-GEN GOVT	-242,210.00	-19,892.92	-221,645.00	-11,425.00	-361,500.00
392	INTERFUND OPERATING TRANS	-100,000.00	-250,000.00	-900,000.00	-700,000.00	-700,000.00
402	GEN GOVT-FINANCIAL ADMIN	257.68	.00	1,172.50	24,826.24	60,000.00
433	PUBLIC WORKS-TRAFFIC	275,867.24	1,052,366.47	63,746.80	441,801.96	3,065,000.00
439	CONSTRUCTION & REBUILDING	136,701.31	.00	.00	198,348.44	690,445.00
	TOTAL TRAFFIC IMPACT FUND	-170,478.17	146,443.75	-1,078,313.41	-128,588.95	278,594.00
	TOTAL REVENUES	-583,304.40	-905,922.72	-1,143,232.71	-793,565.59	-3,536,851.00
	TOTAL EXPENSES	412,826.23	1,052,366.47	64,919.30	664,976.64	3,815,445.00
	TOTAL 33 TRAFFIC IMPACT FUND	-170,478.17	146,443.75	-1,078,313.41	-128,588.95	278,594.00

01/18/2024  
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Lower Gwynedd Township  
YTD BUDGET REPORT WITH PRIOR YEARS THRU  
(PRELIMINARY) DEC 2020/2021/2022/2023  
FOR PERIOD 12 OF 2023

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ACCOUNTS FOR: 35 HIGHWAY AID FUND	PRIOR YR3 ACTUALS	PRIOR YR2 ACTUALS	LAST YR ACTUALS	CURRENT YR ACTUALS	CY REV BUDGET
341 INTEREST EARNINGS	-3,244.82	-345.87	-10,497.49	-30,245.24	-16,000.00
355 STATE SHARED REV & ENTLMT	-377,620.57	-348,150.90	-359,978.98	-368,867.51	-363,634.00
392 INTERFUND OPERATING TRANS	.00	.00	.00	-33,655.00	.00
432 PUBLIC WORKS-SNOW/ICE REMV	20,210.53	41,973.41	40,433.78	6,527.77	30,000.00
437 PUBLIC WORKS-REPR TOOL&MAC	-98.45	.00	.00	.00	.00
439 CONSTRUCTION & REBUILDING	271,840.25	370,015.07	411,057.03	296,793.60	483,000.00
TOTAL HIGHWAY AID FUND	-88,913.06	63,491.71	81,014.34	-129,446.38	133,366.00
TOTAL REVENUES	-380,865.39	-348,496.77	-370,476.47	-432,767.75	-379,634.00
TOTAL EXPENSES	291,952.33	411,988.48	451,490.81	303,321.37	513,000.00
TOTAL 35 HIGHWAY AID FUND	-88,913.06	63,491.71	81,014.34	-129,446.38	133,366.00
GRAND TOTAL	-2,519,137.79	-1,199,978.62	-4,125,947.33	-2,757,136.64	1,625,082.00

01/18/2024  
12:16:16

Lower Gwynedd Township  
YTD BUDGET REPORT WITH PRIOR YEARS THRU  
(PRELIMINARY) DEC 2020/2021/2022/2023  
FOR PERIOD 12 OF 2023

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	Field #	Total	Page Break
Sequence 1	1	Y	Y
Sequence 2	2	Y	N
Sequence 3	0	N	N
Sequence 4	0	N	N

Report title:

YTD BUDGET REPORT WITH PRIOR YEARS THRU  
(PRELIMINARY) DEC 2020/2021/2022/2023

Report Through (P)eriod or (T)otal for years: P  
Fiscal Year/Period for reports: 2023/12  
Print totals only: Y  
Suppress zero balance accounts: Y  
Print revenue as credit: Y  
Print Full or Short description: F  
Print Full GL account: N  
Sort by Full GL account: N  
Multiyear view: D





LOWER GWYNEDD TOWNSHIP  
INVOICE WARRANT REPORT

The Lower Gwynedd Township Board of Supervisors hereby approve the invoices listed on the Accounts Payable Warrant Report for checks dated 01/23/2024 per the signed Resolution. The invoices total \$114,280.36.

SIGNED: \_\_\_\_\_

DATED: \_\_\_\_\_

# Lower Gwynedd Township



## PAID INVOICES REPORT

WARRANT: 012324

TO FISCAL 2024/01 01/01/2024 TO 01/31/2024

VENDOR NAME	DOCUMENT	INV DATE	VOUCHER	PO	CHECK NO	T	CHK DATE	GL ACCOUNT	GL ACCOUNT DESCRIPTION	
2091 ARAMSCO, INC.	165481	12/20/23	67204		102468	P	01/23/24	01409 220	SUPPLIES	127.50
	INVOICE:	S6207253.001								
VENDOR TOTALS				.00	YTD INVOICED			127.50	YTD PAID	127.50
1 CAROL L. SKIPPER	165474	12/20/23	67197		102469	P	01/23/24	01414 314	PROF SERV- LEGAL (ZHB)	684.95
	INVOICE:	12202023								
VENDOR TOTALS				.00	YTD INVOICED			1,585.80	YTD PAID	684.95
3998 CARR AND DUFF, LLC	165486	10/31/23	67209		102470	P	01/23/24	30454 600	PARK IMPROVEMENTS	77,045.20
	INVOICE:	143937-PBI								
VENDOR TOTALS				.00	YTD INVOICED			77,045.20	YTD PAID	77,045.20
3748 D.E. WALKER & SON, INC.	165490	12/20/23	67213		102471	P	01/23/24	01409 370	REPAIRS & MAINTENANCE	909.23
	INVOICE:	203353								
	165491	12/18/23	67214		102471	P	01/23/24	01409 370	REPAIRS & MAINTENANCE	3,940.00
	INVOICE:	35227								
	165492	12/19/23	67215		102471	P	01/23/24	01409 370	REPAIRS & MAINTENANCE	234.75
	INVOICE:	34959								
	165493	12/19/23	67216		102471	P	01/23/24	01409 370	REPAIRS & MAINTENANCE	234.75
	INVOICE:	34960								
VENDOR TOTALS				.00	YTD INVOICED			5,318.73	YTD PAID	5,318.73
3483 ECKERT SEAMANS CHERIN & MELLOTT, LLC	165487	10/20/23	67210		102472	P	01/23/24	01404 310	LEGAL SERVICES	1,950.00
	INVOICE:	1782141								
	165488	10/20/23	67211		102472	P	01/23/24	01404 310	LEGAL SERVICES	10,471.50
	INVOICE:	1782140								
	165489	10/20/23	67212		102472	P	01/23/24	01404 310	LEGAL SERVICES	2,762.50
	INVOICE:	1782142								
VENDOR TOTALS				.00	YTD INVOICED			15,184.00	YTD PAID	15,184.00
440 ELYSE/BERBEN INSIGNIA COMPANY	165478	11/02/23	67201		102473	P	01/23/24	01410 238	UNIFORMS	731.00
	INVOICE:	43204								
VENDOR TOTALS				.00	YTD INVOICED			771.00	YTD PAID	731.00
1954 GROFF TRACTOR & EQUIPMENT, INC.	165480	12/06/23	67203		102474	P	01/23/24	08429 373	REP/MNT VEHICLES, EQUIPME	437.72
	INVOICE:	SWO213926-1								
	165480	12/06/23	67203		102474	P	01/23/24	01437 261	REPAIR TOOLS AND MACH	437.72
	INVOICE:	SWO213926-1								

PAID INVOICES REPORT

WARRANT: 012324

TO FISCAL 2024/01 01/01/2024 TO 01/31/2024

VENDOR NAME	DOCUMENT	INV DATE	VOUCHER	PO	CHECK NO	T	CHK DATE	GL ACCOUNT	GL ACCOUNT DESCRIPTION	
VENDOR TOTALS				.00	YTD INVOICED		1,750.88		YTD PAID	875.44
542 HAJOCA CORPORATION	165479	12/15/23	67202		102475	P	01/23/24	05454 720	REPAIRS & IMPROVEMENT	307.60
INVOICE: S032635649.001										
VENDOR TOTALS				.00	YTD INVOICED		307.60		YTD PAID	307.60
3358 KEYSTONE MUNICIPAL SERVICES, INC.	165484	12/13/23	67207		102476	P	01/23/24	01414 311	PROF SERV- UCC INSPECTING	6,241.50
INVOICE: 36811										
VENDOR TOTALS				.00	YTD INVOICED		12,738.50		YTD PAID	6,241.50
2874 MODERN HANDLING EQUIPMENT COMPANY	165483	12/21/23	67206		102477	P	01/23/24	05437 370	REPAIR TOOLS & MACHINERY	3,123.24
INVOICE: PSVI705375										
VENDOR TOTALS				.00	YTD INVOICED		3,123.24		YTD PAID	3,123.24
85 MOTOROLA SOLUTIONS, INC.	165476	11/01/23	67199		102478	P	01/23/24	01410 238	UNIFORMS	533.88
INVOICE: 8281748338										
165477		12/11/23	67200		102478	P	01/23/24	01410 370	VEHICLE MAINTENANCE	907.20
INVOICE: 8281778782										
VENDOR TOTALS				.00	YTD INVOICED		8,857.08		YTD PAID	1,441.08
2798 PENN DETROIT DIESEL ALLISON. LLC	165482	12/29/23	67205		102479	P	01/23/24	08429 371	REPAIR/MAINT PUMPING STAT	1,712.62
INVOICE: 4563706										
VENDOR TOTALS				.00	YTD INVOICED		1,712.62		YTD PAID	1,712.62
4005 PHILADELPHIA SUBURBAN REALTY APPRAISAL GROUP	165495	12/28/23	67218		102480	P	01/23/24	30409 721	IMPROVEMENT TO TWP. PROPE	1,487.50
INVOICE: 12182023										
VENDOR TOTALS				.00	YTD INVOICED		1,487.50		YTD PAID	1,487.50
									REPORT TOTALS	114,280.36

TOTAL PRINTED CHECKS	COUNT	AMOUNT
	13	114,280.36

\*\* END OF REPORT - Generated by Mary Trocino \*\*

**LOWER GWYNEDD TOWNSHIP  
SUPERVISOR LIAISON REPORT OF  
VOLUNTEER COMMISSION MEETING HIGHLIGHTS**

Board/Commission	PLANNING COMMISSION
Members/Terms	<p style="text-align: center;">CRAIG MELOGRANO, CHAIR - TERM EXPIRES: 12/31/2025  RICH VALIGA, VICE-CHAIR - TERM EXPIRES: 12/31/2027  MAUREEN NUNN – TERM EXPIRES: 12/31/2027  CRAIG ADAMS – TERM EXPIRES: 12/31/2024  RUSTY BEARDSLEY - TERM EXPIRES: 12/31/2025  MIKE MROZINSKI – TERM EXPIRES: 12/31/2024  DANIELLE PORRECA – TERM EXPIRES: 12/31/2026</p>
Meeting Schedule	3 <sup>rd</sup> Wednesday of every month
Supervisor Liaison(s)	Danielle Duckett, Mike Twersky
Staff Liaison	Jamie Worman
Minute Taker	Patty Furber
<b>MEETING HIGHLIGHTS</b>	
Meeting Date	Wednesday, January 17, 2024
<b>Decisions/Recommendations</b>	
<ul style="list-style-type: none"> <li>• <b><u>Janssen Amended Parking Lot Plan:</u></b> <ol style="list-style-type: none"> <li>1. The applicant will comply with the review letters from CKS dated January 12, 2024, Bowman dated January 10, 2024. Since the PC did not receive any comments from the Fire Marshal, the applicant agreed that they would work with the Fire Marshal, Al Comly, to address any forthcoming comments.</li> </ol> <p style="text-align: center;"><b>Motion passed 7-0 vote</b></p> </li> <li>• <b><u>GMU Francis Maguire Healthcare Innovation Center:</u></b> <ol style="list-style-type: none"> <li>1. Applicant will provide a 15’ wide trail easement along Evans Rd.;</li> <li>2. Applicant will comply with all review letters from Gilmore, Bowman and Fire Marshal, Al Comly;</li> <li>3. The PC board recommends granting all waivers conditioned that the applicant installs 4 dual EV charging stations, increases the roof steel load capacity to support future solar panels, convert all lighting on campus to LED by 2025;</li> <li>4. The PC board accepts and supports the findings from the arborist report, the landscape architect design, Bohler’s carbon reduction analysis and the Evolution Sustainability Group’s LED Lighting &amp; EV Charging Project Overview report.</li> </ol> <p style="text-align: center;"><b>Motion passed 7-0 vote</b></p> </li> </ul>	
<b>Major Discussion Items</b>	
<ul style="list-style-type: none"> <li>• Reorganization of the Planning Commission: No Changes (Craig Melograno, Chair, Rich Valiga, Vice-Chair, Patty Furber, Secretary, Jamie Worman, Vice-Secretary)</li> </ul>	

NOTE: This form lists significant highlights from a public board or commission meeting; it does not supplement or replace the official minutes of the meeting. Minutes are posted on the Township’s website on the “Meetings” page. This form is included in the Board of Supervisor’s meeting packet, which also is posted on the “Meetings” page.

- GMU tree waiver discussion – the applicant proposes to remove 122 healthy trees, applicant stated that there are 381 trees in poor condition (dead/dying) that need to be removed. They propose to replant 218 trees (caliper inches between 3”-4”), 971 shrubs, install 4 dual plug charging EV stations, replace lighting throughout campus with LED, which they stated will reduce carbon reduction by 351.46 metric tons/year, will increase the roof steel load to support future solar panels and agreed to add a 15’ wide trail easement on Evans Rd.

Next Meeting	Wednesday, February 21, 2024
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NOTE: This form lists significant highlights from a public board or commission meeting; it does not supplement or replace the official minutes of the meeting. Minutes are posted on the Township’s website on the “Meetings” page. This form is included in the Board of Supervisor’s meeting packet, which also is posted on the “Meetings” page.