

BUILD PHILLY NOW – TOC IMPACT ANALYSIS MEMO

Updated March 2026

TO: Philadelphia City Council

FROM: Build Philly Now

RE: Parker Transit-Oriented Communities Bills – Parcel-Level Impact Analysis



EXECUTIVE SUMMARY

Mayor Parker's five TOC bills (HOME II et al.) would create transit-oriented zoning overlays around 13 Market-Frankford Line stations. BPN's parcel-level analysis estimates the bills would produce +7,839 housing units under current law, including the MIN overlay's deterrent effect.

Five complementary reforms could increase this to 43,668 units:

- Parker TOC (as passed) + 7,839 → 7,839 total
- Fund or Repeal MIN + 1,194 → 9,033 total
- Remove Cost Cliff + 959 → 9,992 total
- 6-Corridor Expansion +23,131 → 33,123 total
- Eliminate Parking Min. +10,545 → 43,668 total



HOUSING YIELD (13 MFL Stations, 1,320 ft radius)

- Eligible parcels: 9,207
- Theoretical additional units: 30,229
- Near-term (soft sites): 9,992
- Realistic (w/ cost cliff): 9,033
- Cost cliff units lost: 959
- Realistic (w/ MIN deterrent): 7,839
- MIN units lost: 1,194
- FAR bonus blocked: 1,361 (CMX-3/4/5/RMX-3 in MIN)
- Behavioral deterrent: 1,209 (0.44 DiD rate, >=10 units)



SOFT SITE METHODOLOGY (CORRECTED)

Soft sites are classified using assessed MARKET VALUE (pre-exemption), not taxable building value. The previous methodology incorrectly classified tax-exempt properties (churches, government buildings, nonprofits) as economically obsolete because their taxable_building field was \$0 despite having buildings worth hundreds of thousands of dollars.

Categories:

- Vacant land (OPA category + \$0 market value)
- Surface parking (building code description)
- Under-utilized ($\leq 33\%$ of zoning capacity by market value)



COST CLIFF

The 30% FAR bonus for CMX-3/4/5 pushes buildings to 8 stories, triggering a 32% construction cost spike (wood frame \rightarrow steel/concrete). This costs 959 realistic housing units.

- 7 stories: \$171/sqft (Type III/IV wood frame) – optimal
- 8 stories: \$226/sqft (Type I steel/concrete) – 32% spike
- 12 stories: \$216/sqft – viable at 800%+ FAR

Source: Eriksen & Orlando (2022), Real Estate Economics



MIN OVERLAY IMPACT

The Mandatory Inclusionary Housing overlay (MIN) blocks the 30% FAR bonus for CMX-3/4/5/RMX-3 parcels per §14-513(5)(a)(.2), and deters new construction of ≥ 10 -unit projects via unfunded affordability mandates.

- District 3 (Gauthier): -1,452 units
- 46th St (100% MIN), 52nd St (97% MIN) hardest hit
- District 7 (Lozada): -1,118 units
- Frankford TC (86% MIN) hardest hit

DiD methodology: Jan 2019 – Dec 2025, new construction ≥ 10 units
Inside MIN: 27.7/yr \rightarrow 8.7/yr; Outside: 6.8/yr \rightarrow 4.6/yr
Behavioral deterrent rate: 0.44



6-CORRIDOR EXPANSION

- New eligible parcels: 10,832
- Expansion realistic: 23,131
- Combined realistic: 32,164
- Multiplier vs Parker: 3.6x

Corridors: Complete MFL (fill gaps), Girard Ave (Rt 15 + BSL), North Broad BSL, South Broad BSL, Cheltenham/Germantown RR, West Philadelphia RR



PARKING REFORM

Units lost to current parking minimums: 10,545 (all corridors)
Units lost with Parker 50% reduction: 7,481
Units lost with full elimination: 0

Every peer city with transit-oriented zoning has eliminated parking minimums near transit stations.



RECOMMENDATIONS

1. Fix the FAR bonus: increase to 800%+ to clear the 8-story cost cliff
2. Fund or repeal the MIN overlay
3. Add the Broad Street Line
4. Add Girard Ave, Regional Rail, and MFL gap stations
5. Eliminate parking minimums near transit
6. Publish parcel-level data for transparency



DATA & METHODOLOGY

Parcel data: Philadelphia OPA (9,207 eligible parcels)
Building footprints: OpenDataPhilly/L&I (actual lot areas via PostGIS)
CMX-1 adjacency: PostGIS ST_Relate (3,712 high-confidence parcels)
Zoning rules: BPN Rules Engine (13 JSON rule files, Title 14)
Construction costs: Eriksen & Orlando (2022)
MIN deterrent: DiD analysis, Jan 2019 - Dec 2025

Full methodology: toc.buildphillynow.com/data
MIN impact study: min-analysis.netlify.app
Dashboard: buildphillynow.com

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