Comprehensive Planning Through the Hourglass

Setting up your Comprehensive Plan to stand the test of time…

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Samantha McLean, AICP, LEED Green Associate

Introduction

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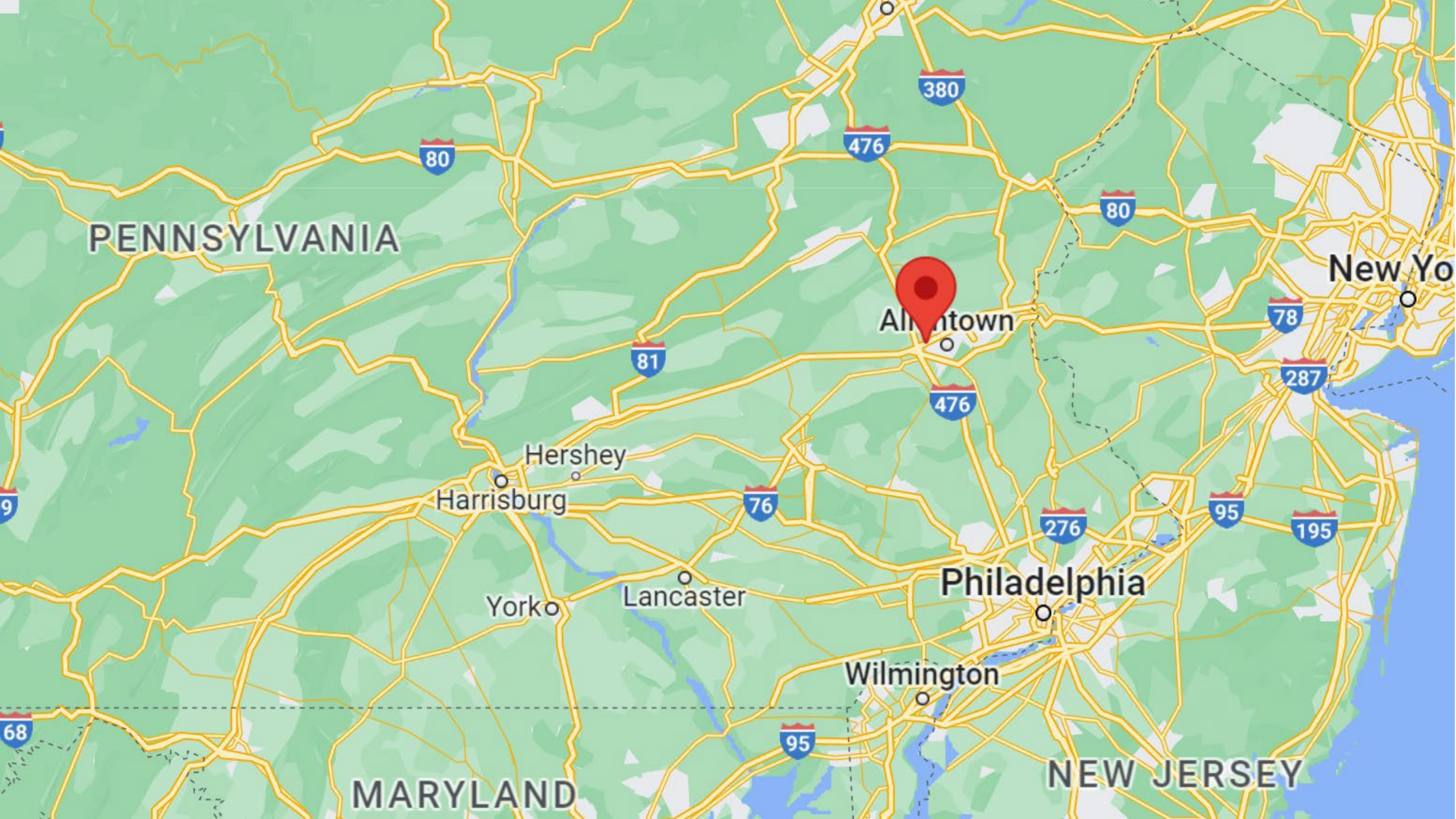
Michael Baker International


PENNSYLVANIA
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380
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Hershey
Harrisburg
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195
Philadelphia
York
Lancaster
Wilmington
68
95
MARYLAND
NEW JERSEY

Hourglass Planning Components

- The Catalyst
- Community Discussions
- Topic Deep Dives
- Vision
- Implementation:
  - Topic Plans
  - Policies, Programs, & Infrastructure
- Reexamination Throughout

The Catalyst

Flexible zoning in South Whitehall landed massive Kay Builders development.
- October 2017

South Whitehall Ridge Farm project draws another angry crowd.
- February 2018

South Whitehall considers public workshops over proposed Ridge Farm development.
- February 2018

South Whitehall residents get lesson on land development, details on Ridge Farm development.
- April 2018

Massive mixed-use project proposed on Cedar Crest Boulevard raising worry over traffic.
-June 2018

Review of massive Ridge Farm gets down to nitty gritty on roads.
–Oct 17, 2018

South Whitehall residents see bold project as runaway development.
- October 2020

The Catalyst

- Common underlying theme:

Where's the rubric?

WE DIDN'T KNOW ABOUT THE 2009 COMPREHENSIVE PLAN!

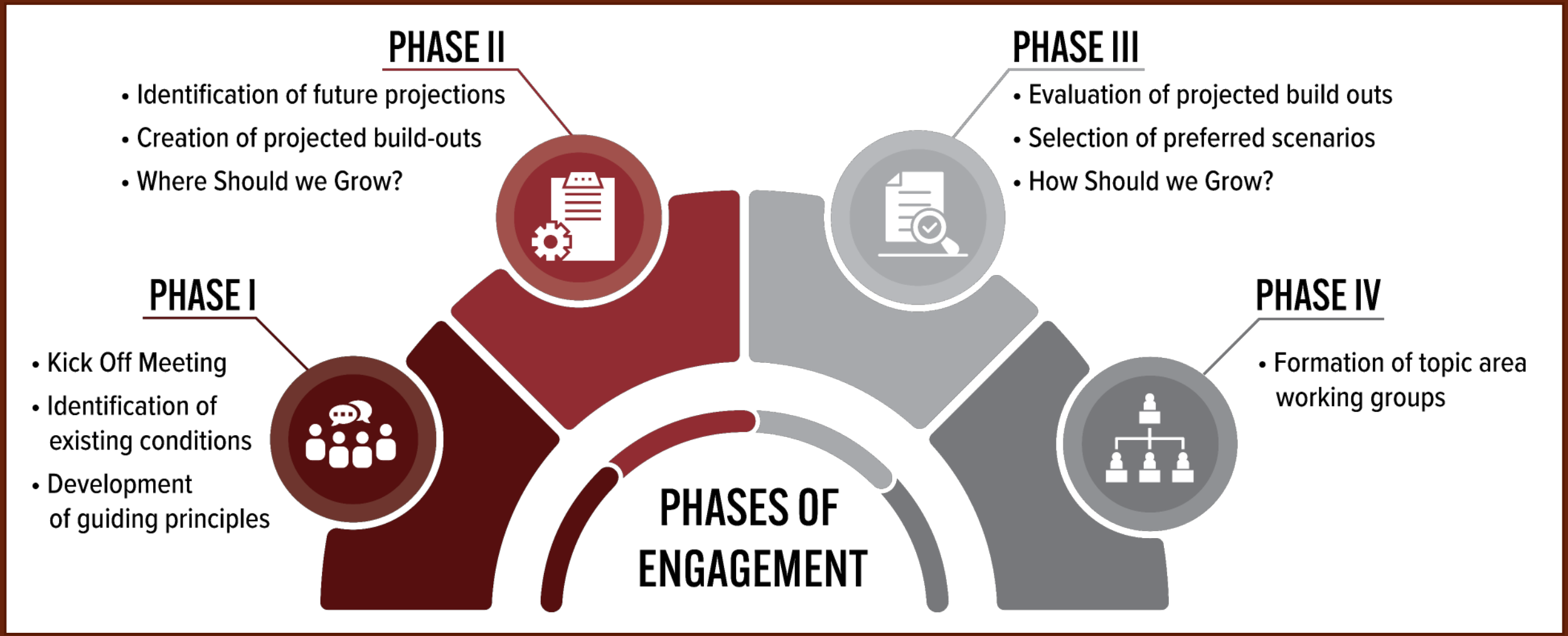
The Municipal Comprehensive Plan

- Typical Approach
  - "Top – Down" Approach
  - Steering Committee
  - Meetings via standard public notice requirements.
  - Final Draft reviewed for public comment.
- Pitfalls
  - Hard to get substantive community engagement
  - Plan is essentially complete when released for public comment.

The Municipal Comprehensive Plan

- Used Public Engagement to drive the process.
- Public Engagement process started broad and gradually focused to specifics.
- Steering Committee developed final draft of Comp Plan based on the Public input received.

Community Discussions



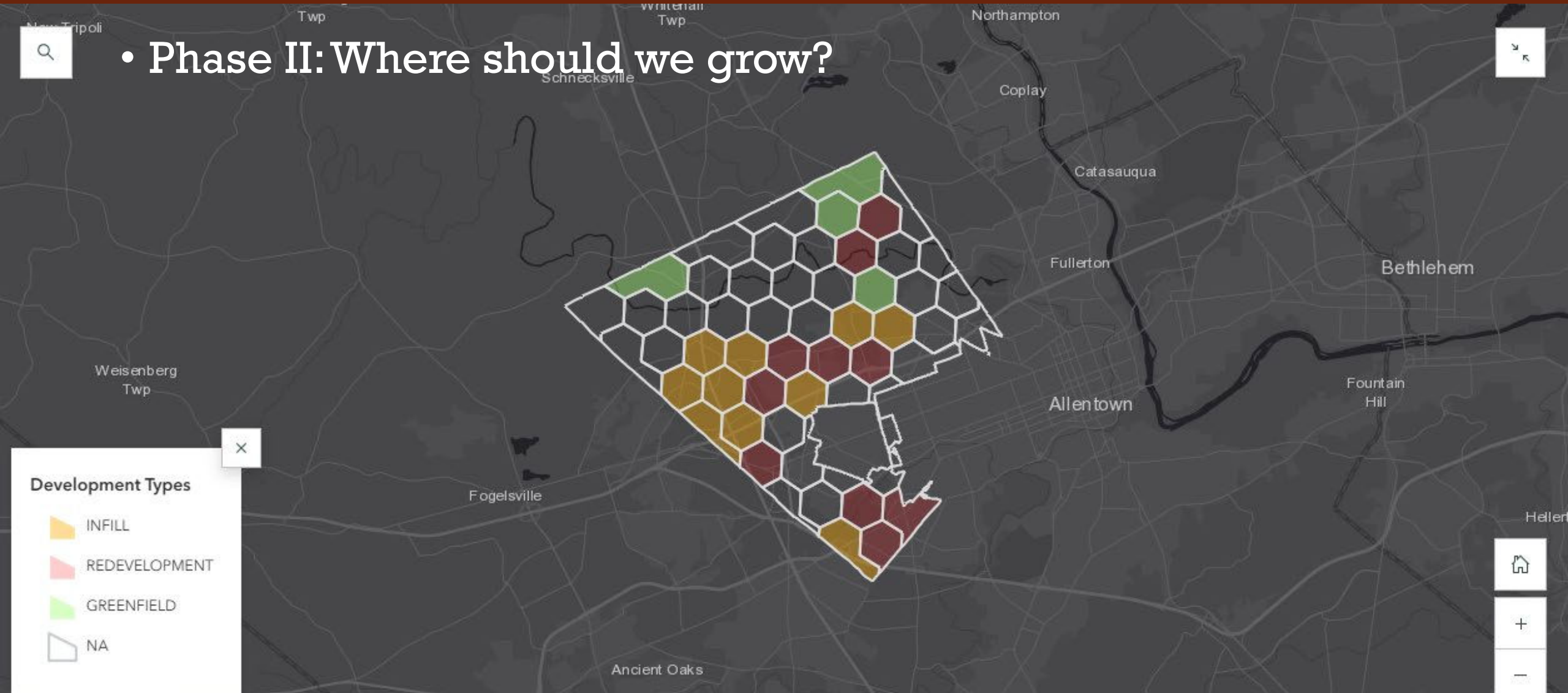
Community Discussions

- Phase I: Guiding Principles
  - Guiding Principles Meetings
  - 100-150 people held at Parkland HS
  - Post card "hijacking" meeting
  - June 18, July 16, July 30, 2019
  - Guiding Principles Survey (surveymonkey)

"Stop all development!"

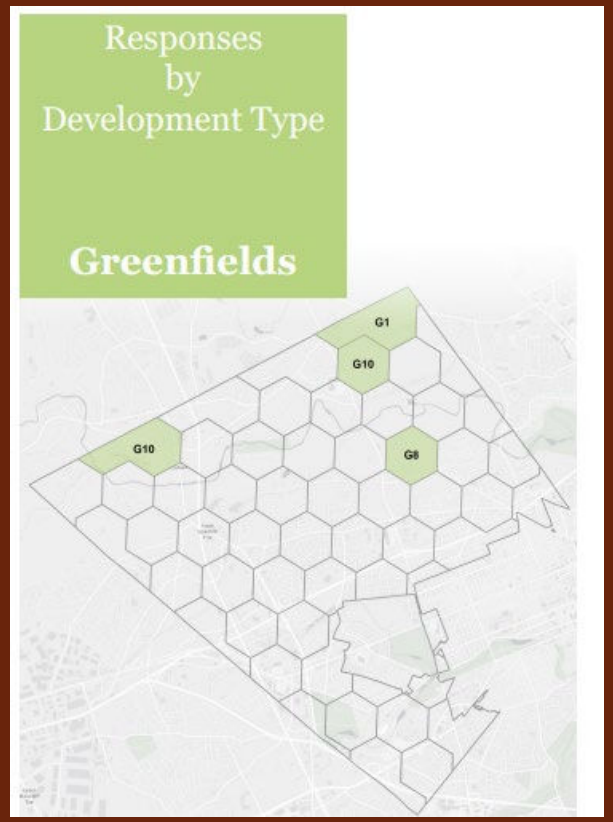
Community Discussions

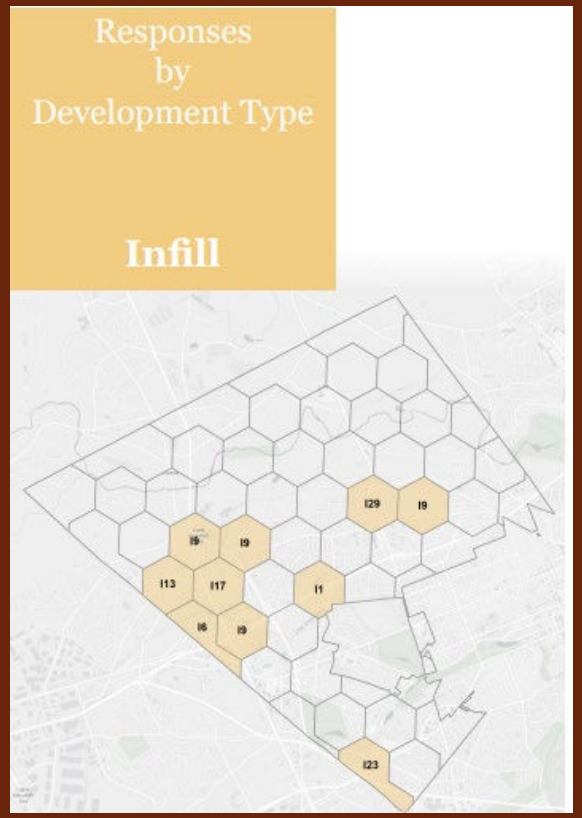
- Phase II: Where should we grow?

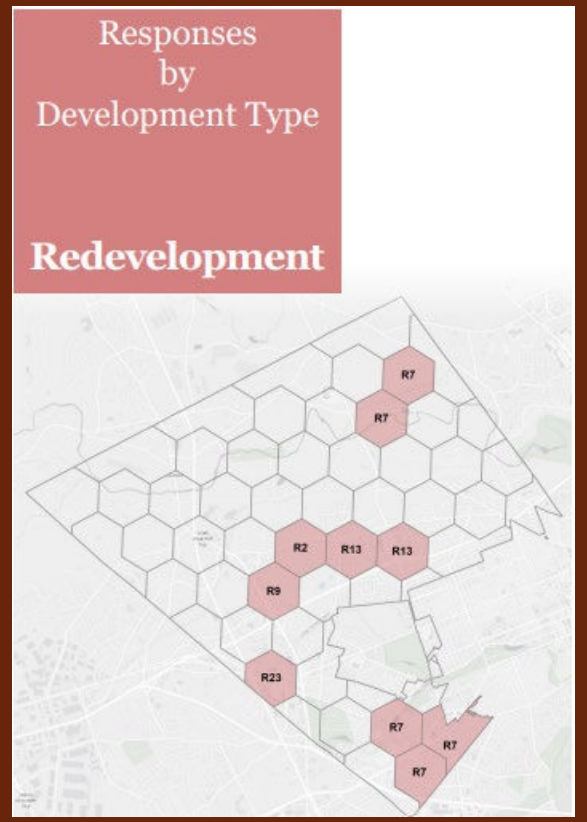


Community Discussions

- Phase III: How should we grow?







Topic Deep Dives

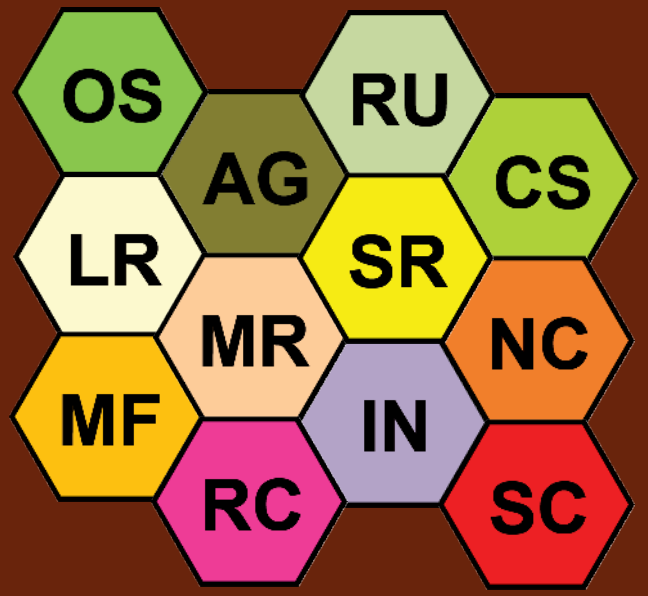
- Phase IV: Focus Groups

COMMUNITY FACILITIES	COMMUNITY UTILITIES	HOUSING	RESOURCE PROTECTION	TRANSPORTATION
• Recreation	• Water	• Type	• Agricultural	• Highways
• Municipal Buildings	• Sewer	• Location	• Natural	• Local Streets
• Fire/Police	• Stormwater	• Cost	• Historic	• Parking
• Libraries	• Energy	• Projections	• Scenic	• Bike/Ped
• Health Care				• Transit
• Education				• Freight

Topic Deep Dives

- Steering Committee
- Series of Joint Meetings with Planning Commission and Board of Commissioners.
  - Worked through each section of the Comp Plan
  - Focused the Vision.
  - Finalized implementation.

Vision: Place Types



- Open Space
- Agriculture
- Rural
- Conservation Subdivision
- Large Lot Residential
- Small Lot Residential
- Multi-Family Residential
- Mixed Residential
- Neighborhood Center
- Suburban Center
- Regional Employment Center
- Industrial

Identification of Land Uses » Integration of Place Types » Zoning Updates

Vision

- All public engagement comes together to formulate a final vision in the Comp Plan
- *Guide future growth in a sustainable and harmonious matter that preserve the character, community, and diversity of South Whitehall Township*

- Insert > Long-Range Planner!

Vision

- How to implement?
- How to measure success?
- How to know if we're on track?

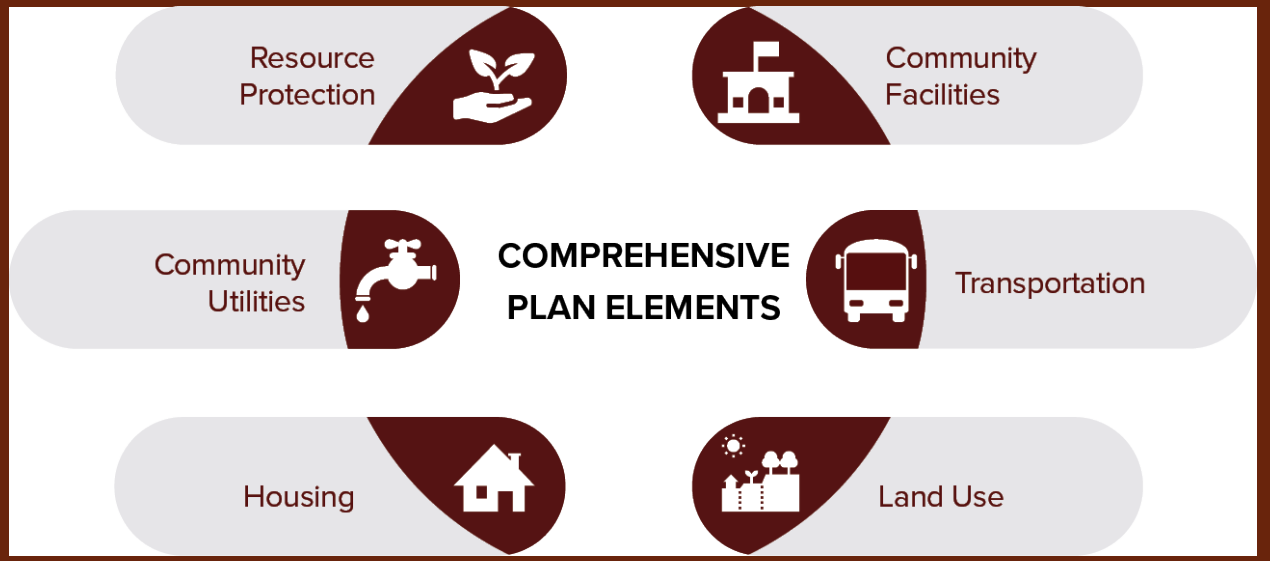
- Comp Plan Strategy: Periodically reexamine the Comp Plan to identify progress, major problems, significant changes, and areas in need of revision

Where's the rubric?

Vision ⟶ Implementation Plan

Implementation Plan Needs

- Address missing details
- Direct actions over time
- Easy to understand and track



Implementation Plan

Implementation

Implementation Item	Description	Plan Elements	Timeline	Priority
Active Transportation (A1)	Develop plan to provide safe/efficient bicycle and pedestrian connectivity		Short Term	High
Advisory Committee Evaluation (A2)	Evaluate roles/duties of boards, committees, and subcommittees		Short Term	High
Agricultural Preservation (A3)	Develop plan and programs to preserve agricultural lands and culture		Short Term	Medium
Broadband Infrastructure (B1)	Increase access to high-speed internet		Mid Term	Medium
Capital Improvements Plan (C1)	Integrate capital improvements budgeting and planning across departments		Short Term	High
Energy Conservation (E1)	Investigate energy reduction opportunities/ policies		Long Term	Low
Hazard Mitigation (H1)	Coordinate hazard mitigation planning between Township and regional entities		Short Term	Medium
Historic Preservation (H2)	Develop plan to preserve historic assets and places		Short Term	Medium
Housing (H3)	Develop programs and policies to ensure current and future housing needs are met		Mid Term	Low
Infrastructure Evaluation (I1)	Evaluate municipal services and utilities for functionality and expansion		Short Term	High
Landscape Preservation (L1)	Develop plan and policies to preserve important cultural and historic landscapes		Mid Term	Medium
Open Space Preservation (O1)	Develop a plan, strategy, and process to preserve open space and natural areas		Short Term	Medium
Official Map Updates (O2)	Update the Official Map with new recommendations from the Comp Plan		Short Term	High

Summary

Implementation Item	Description	Plan Elements	Timeline	Priority
Park & Rec. Plan (P1)	Implement the priority goals of the P&R Plan		Long Term	Low
Public Safety Evaluation (P2)	Evaluate public safety needs of SWT (including outside 3rd party evaluation)		Short Term	High
Regional Coordination (R1)	Investigate regional/multi-municipal planning opportunities (transportation, watershed, etc.)		Mid Term	Medium
Reexamination Report (R2)	Establish timeline and mechanism to reexamine and reevaluate the Comp Plan		Short Term	Medium
Resource Protection Ordinances (R3)	Draft ordinances to protect specific resources (riparian areas, woodlands, steep slopes, etc.)		Long Term	Low
SALDO Updates (S1)	Update the SALDO based on Comp Plan recommendations (design standards)		Short Term	Medium
Sewer Plan (Act 537) (S2)	Update Township sewage facilities plan per DEP requirements		Short Term	High
Solid Waste (S3)	Evaluate SWT waste collection and recycling processes		Mid Term	Medium
Stormwater Plan (Act 167) (S4)	Develop a stormwater management plan		Mid Term	Medium
Transfer of Development Rights Program (T1)	Investigate the feasibility/applicability of a TDR program		Mid Term	Medium
Traffic Safety (T2)	Identify high crash and priority safety improvement areas		Short Term	High
Transportation Plan (T3)	Inventory critical transportation infrastructure, investigate Act 209 feasibility, update necessary transportation policies		Short Term	High
Zoning Updates (Z1)	Update zoning ordinance to be consistent with the Comp Plan		Short Term	High

Implementation Plan

Framework

- Key Goals
- Recommended Actions
- Priority/Timeline

Implementation Framework

EXAMPLE

A standardized Implementation Framework helps to outline all of the elements needed to implement the goals of this plan and consistently track results. This framework should be used to inform decision-makers of the steps, timing, resources, and partners necessary for each implementation item, while still allowing the flexibility to update and adjust pieces of the framework as needed. This framework is intend to be used as a guide to help develop a more detailed scope of work at the time of implementation.

KEY GOALS
The overarching result that each implementation item intends to accomplish.

KEY ACTIONS
List of specific steps necessary to achieve the key goals. Several actions may list sequential steps such as planning, assessment, and policy development. These actions are intended to be fluid and updated over time as steps are completed, priorities change, and resources become available.

PRIORITY
Lists the level of importance to pursue key actions:

- High
- Medium
- Low

TIMELINE
Identifies the targeted time periods to pursue key actions:

- Short-Term (1-2 years)
- Mid-Term (2-5 years)
- Long-Term (5-10 years)

FUNDING SOURCES
List of possible funding sources that can be used to initiate the first key actions if necessary

KEY PARTNERS
List of necessary internal departments and possible outside agencies that can support key actions. Township Board of Commissioners and Administrative Staff will be involved in all actions.

MEASURE OF SUCCESS
The metrics used to track progress made towards achieving key goals

PLAN ELEMENTS
Elements highlighted in red are impacted by the proposed implementation item

Topic Plans

- Combine actions into topic-specific plans

Implementation Plan

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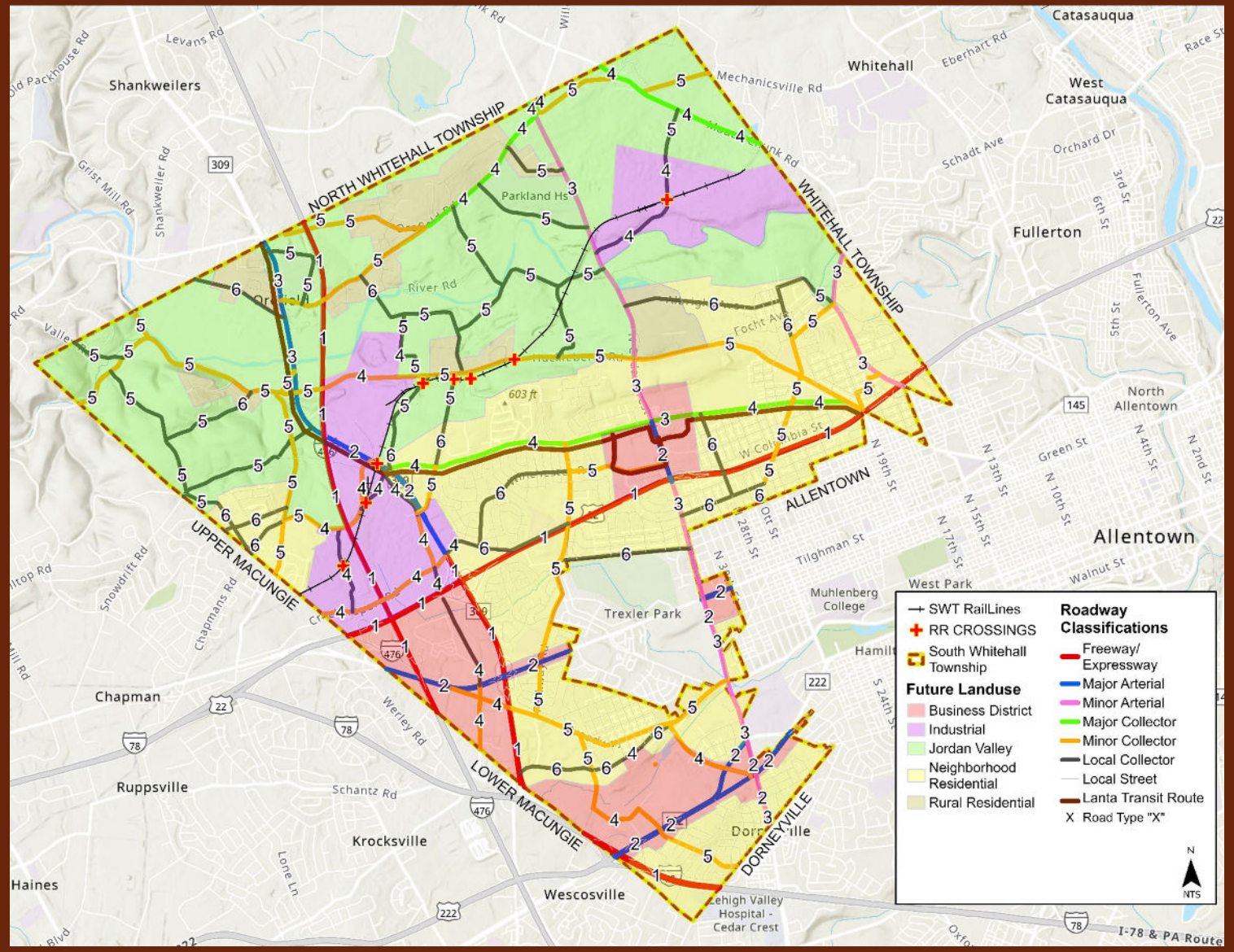
Topic Plans: Transportation Plan Phase I

Topic Plans: Transportation Plan Phase II

TRANSPORTATION
CLASS
SOUTH WHITEHALL TOWNSHIP

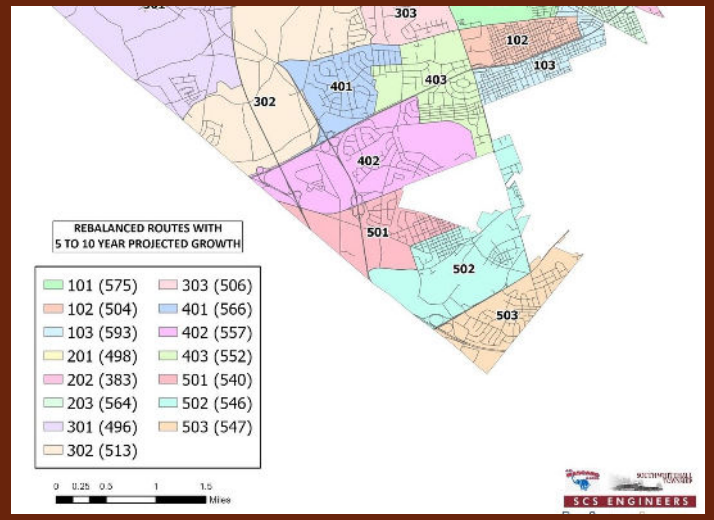
TRANSPORTATION
FREIGHT
SOUTH WHITEHALL TOWNSHIP

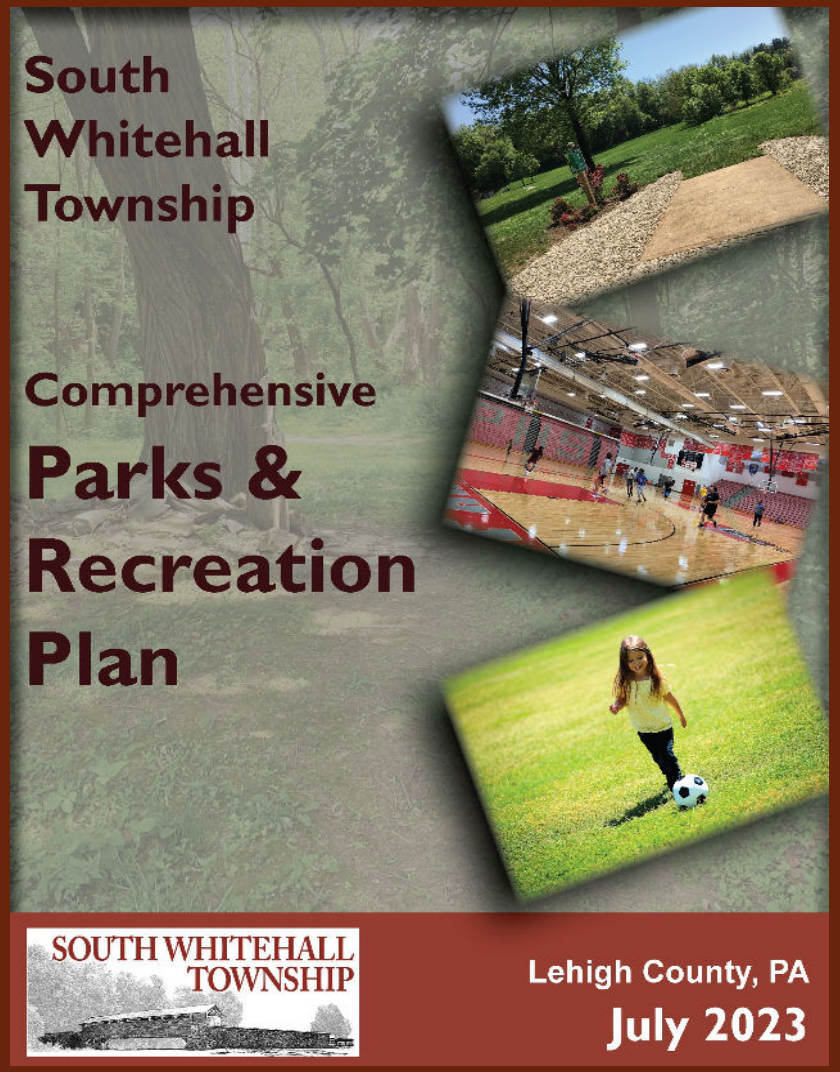
TRANSPORTATION
TRAFFIC
SOUTH WHITEHALL TOWNSHIP



Topic Plans: Other Plans/Studies

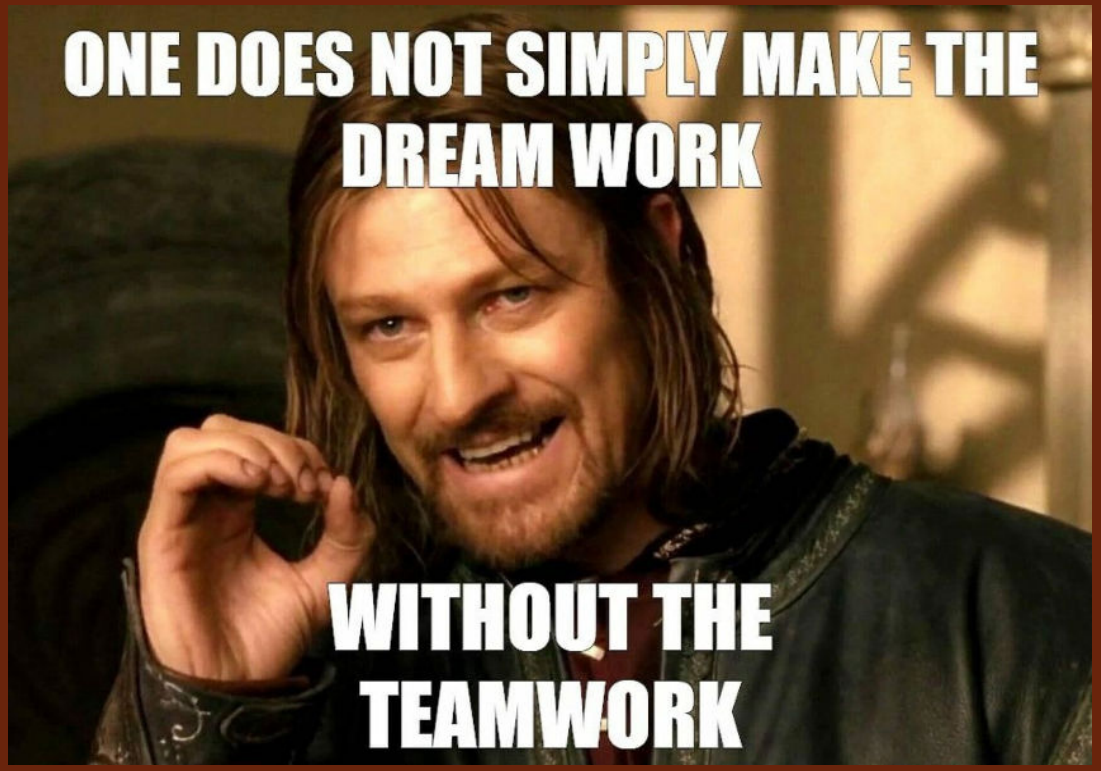
- Parks & Recreation Plan
- County Hazard Mitigation Plan
- Solid Waste & Recycling Evaluation
- Utility Rate Study
- Act 537 System Transfer Plan





Topic Plans

- Targeted, intentional use of consultants
- Leverages each party's skillset and unique position
  - Consultant: Specialized subject matter expertise, access to software, time, ability bring components together, etc.
  - Municipal Staff: Community connections, understanding of political landscape, institutional knowledge, etc.



Topic Plans: South Whitehall Landscapes

Implementation

LANDSCAPE PRESERVATION (L1)

Identify and evaluate important landscapes, including scenic corridors and cultural landscapes, throughout the Township and investigate techniques for preservation.

KEY GOALS

Preserve and enhance landscapes that help define the sense of place that differentiates South Whitehall from other municipalities

KEY ACTIONS

1. Identify and evaluate important landscapes in the Township
2. Investigate techniques to preserve the viewsheds, resources, and unique character of the landscape
3. Conduct targeted outreach to key landowners

FUNDING SOURCES

- PA DCNR
- PA DCED
- PHMC
- Private Foundations

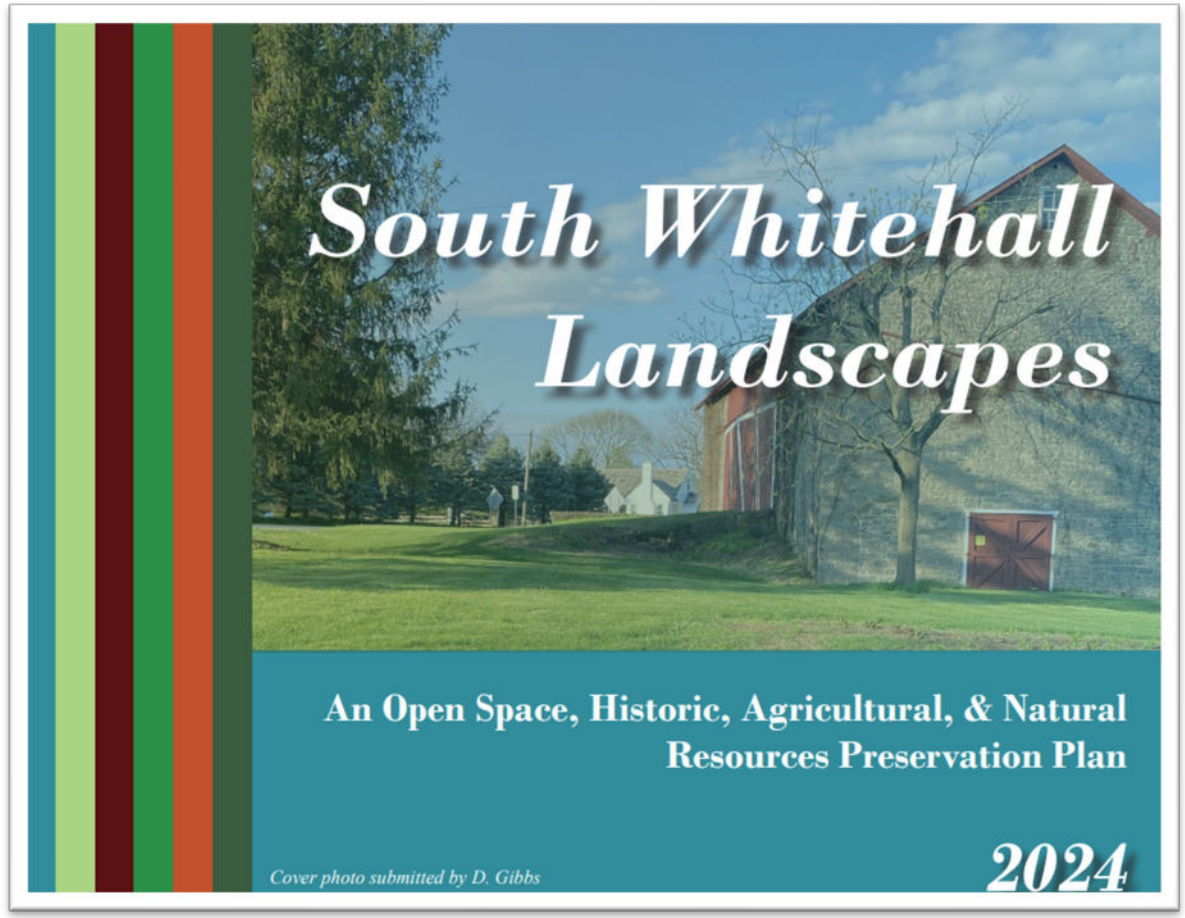
KEY PARTNERS

- Planning Commission
- Community Development Dept.
- Community/Landowners

MEASURE OF SUCCESS

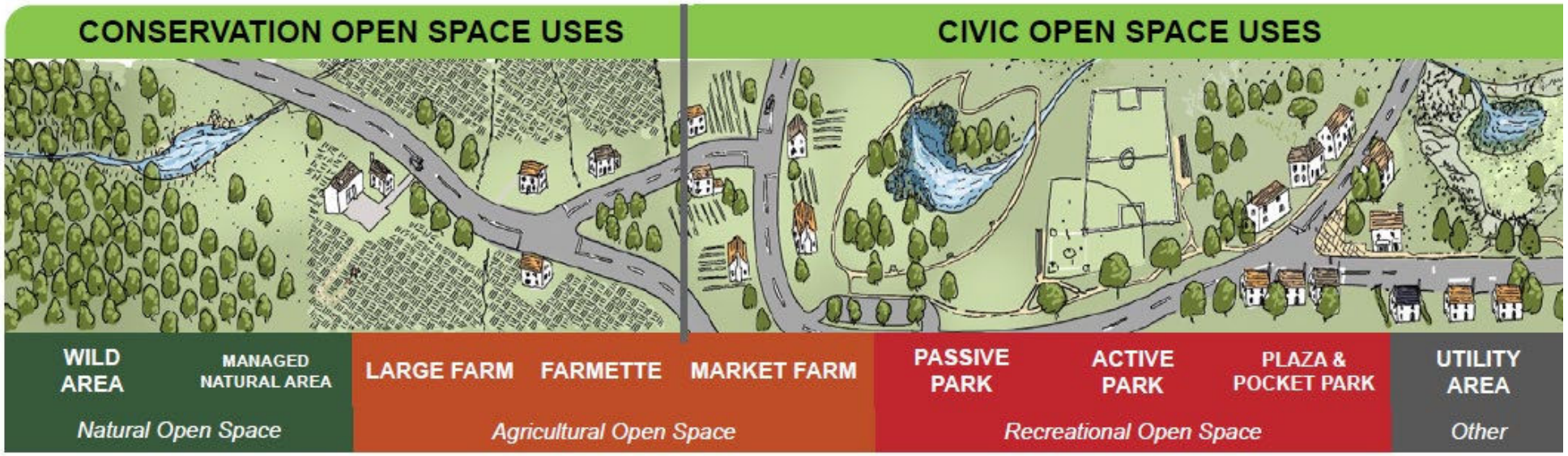
- Completed plan
- Acres/Sites Preserved
- Adoption of ordinances/zoning updates

PRIORITY TIMELINE	High Short	Medium Mid	Low Long



Topic Plans: South Whitehall Landscapes

- Development of Open Space Transect
- Compiling and building out plan components
- Visual communication



Open Space Transect

Topic Plans ⟶ Policies

South Whitehall Landscapes & the Historic Resources Inventory

Strategies: Inventory

Historic Resource Inventory

A Historic Resource Inventory is a valuable step in evaluating what resources should be preserved and to what extent. A resource inventory typically starts with a survey of all features in an area that could be considered historic. This may include property/deed research, physical inspections, and interviews with residents or stakeholders. A simple inventory, otherwise known as a "windshield survey" is conducted by driving around the selected area and at first glance identifying what is visible and looks old to the naked eye. A competent surveyor can use the windshield survey to identify buildings, structures, and objects in need of further investigation.

Once the initial survey of resource has been completed, research is conducted to determine the resource's historic context, significance, and integrity. Typically, this requires minimal research for a community-wide survey, with the goal of depicting a snapshot of what makes the resource historic, not necessarily writing its entire story. Often, a community will then classify the resources based on a set of criteria to help set parameters on what should be done with those resources to appropriately preserve their context, significance, and integrity.

The Historic Resource Inventory serves as the official record for properties considered historic in a community, which can then be used to determine preservation tactics, put controls on construction/restoration/demolition, or prioritize properties for protection. South Whitehall Township began

Daniel Troxell Blacksmith Shop | *Source: Jenna Soldridge*

conducting a Historic Resource Survey in the winter of 2023/2024. This survey included visual inspections, review of past Township plans and documents, and research into historic texts/maps. Once completed, the survey will be cataloged into an official Historic Resource Inventory for the Township and help guide future preservation efforts. Resources will be classified into four categories outlined on the next page. This inventory will be a dynamic database that can be updated if more resources are identified or information on existing resources are updated. Resources will also be able to move through classification levels following the criteria outlined on the next page.

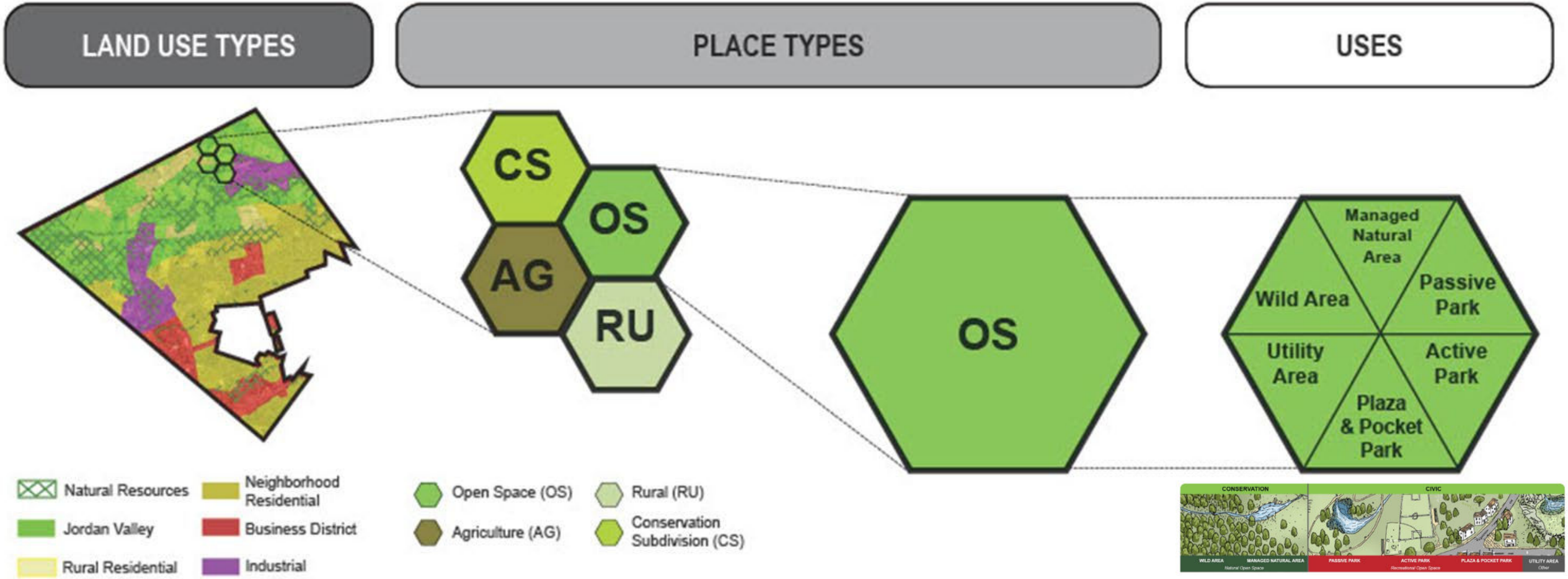
The goal of the South Whitehall Township Historic Resource Inventory is to provide adequate information to understand the context, significance, integrity, and community importance of historic resources in the Township.

Strategies: Classify

	Class IV	Class III	Class II	Class I
	Listed on the South Whitehall Historic Resource Inventory, but additional research is required to determine eligibility for further classification.	Designated as a Class III resource by the Board of Commissioners by resolution. Class III resources may be eligible for adaptive reuse provisions provided assurances are in place. Class III resources may be added to the Official Map. These resources may be eligible for additional Township programs.	Class II resources are listed on the Pennsylvania Historical and Museum Commission's list of National Resister-eligible resources. These resources shall be identified on the Official Map.	Class I resources are listed as a National Historic Landmark or on the National Register of Historic Places. These resources shall be identified on the Official Map.
Designation Process	If not already identified in the South Whitehall Historic Resource Inventory, an application or letter requesting designation should be submitted. Submission should include justification for inclusion and statements of significance and integrity.	A technical review will be conducted by Township staff and/or third party consultant. Review shall include statements of integrity and significance or community importance. Designation should further the goals of SWT Landscapes. Report and recommendation will be provided to the BOC for possible designation by resolution.	Designation process is the responsibility of State Historic Preservation Office (SHPO). Township staff may assist property owners with the application process.	The designation of National Register properties is the responsibility of the National Park Service. Township staff and or third-party consultant may assist in the application process.

Topic Plans ⟶ Policies

South Whitehall Landscapes & Zoning Updates (JV Overlay, PIRT)



Topic Plans ⟶ Policies

South Whitehall Landscapes & Zoning Updates (JV Overlay, PIRT)

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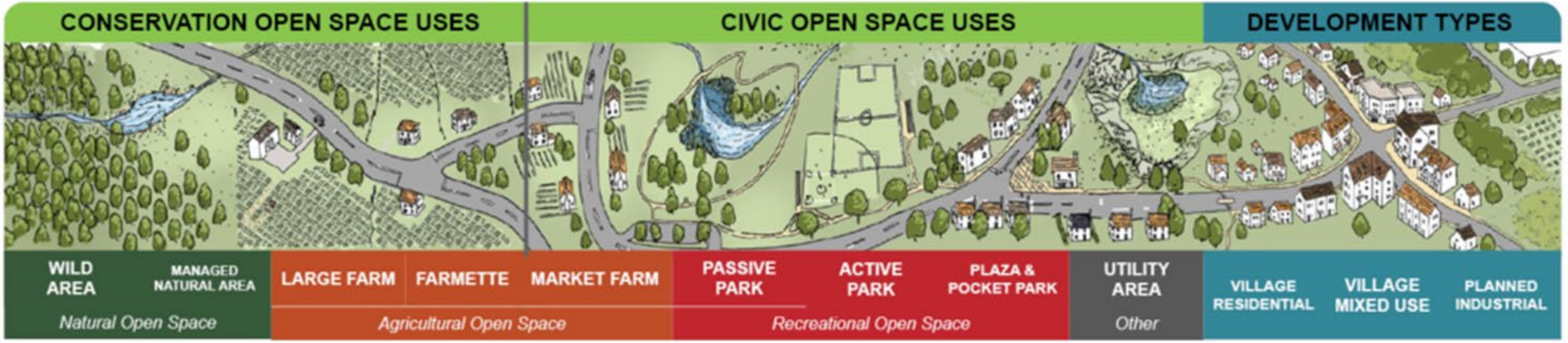
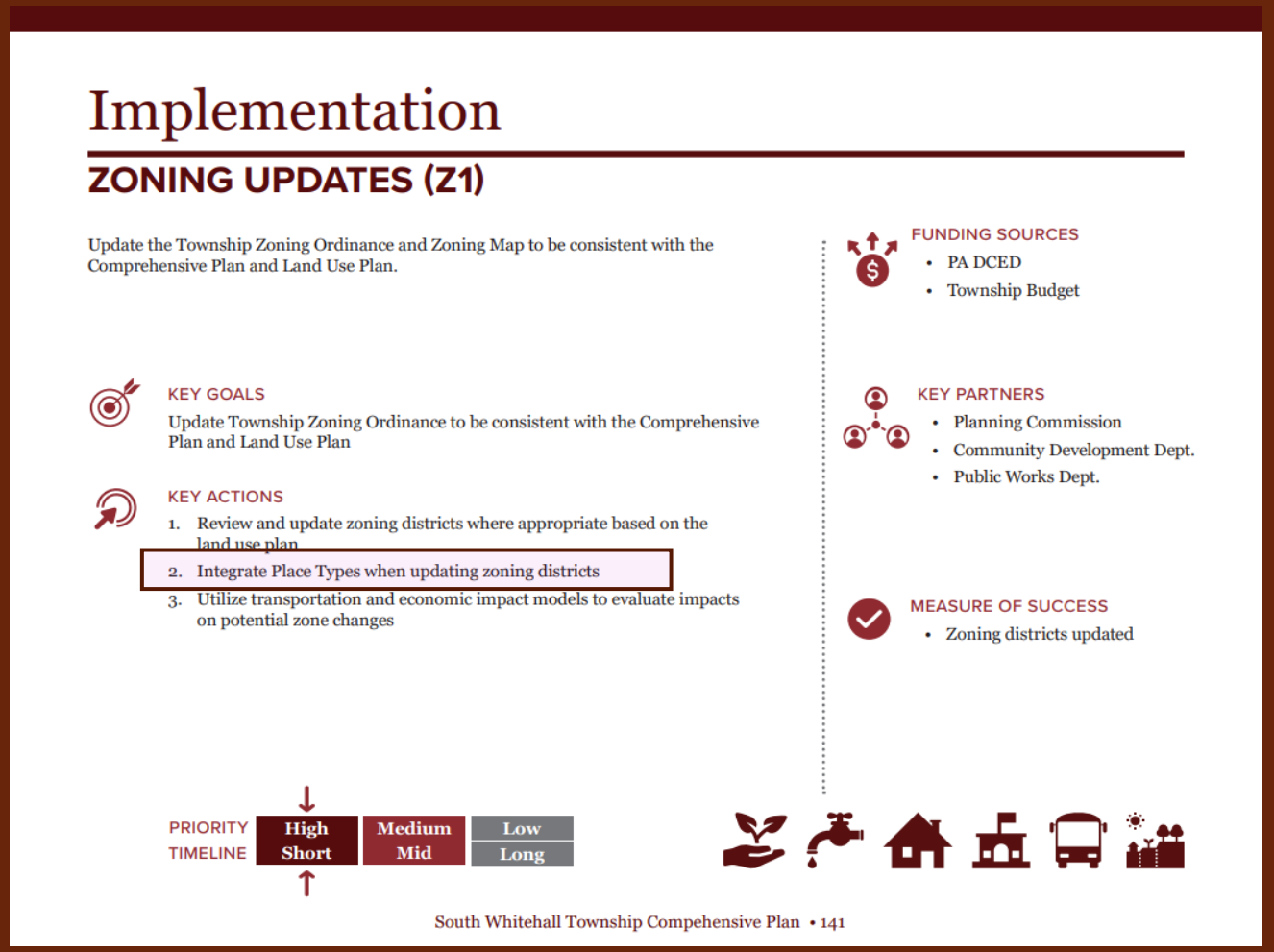
- **Conservation Subdivision Place Type**
- **Open uses + development types**



Topic Plans ⟶ Policies

South Whitehall Landscapes & Zoning Updates (JV Overlay, PIRT)



Implementation

ZONING UPDATES (Z1)

Update the Township Zoning Ordinance and Zoning Map to be consistent with the Comprehensive Plan and Land Use Plan.

KEY GOALS

Update Township Zoning Ordinance to be consistent with the Comprehensive Plan and Land Use Plan

KEY ACTIONS

1. Review and update zoning districts where appropriate based on the land use plan
2. Integrate Place Types when updating zoning districts
3. Utilize transportation and economic impact models to evaluate impacts on potential zone changes

FUNDING SOURCES

- PA DCED
- Township Budget

KEY PARTNERS

- Planning Commission
- Community Development Dept.
- Public Works Dept.

MEASURE OF SUCCESS

- Zoning districts updated

PRIORITY TIMELINE: High Short | Medium Mid | Low Long

South Whitehall Township Compehensive Plan • 141

- Established need for zoning update
- Utilize the common vocab of place types to help illustrate zoning district goals to the general public

Topic Plans ⟶ Policies

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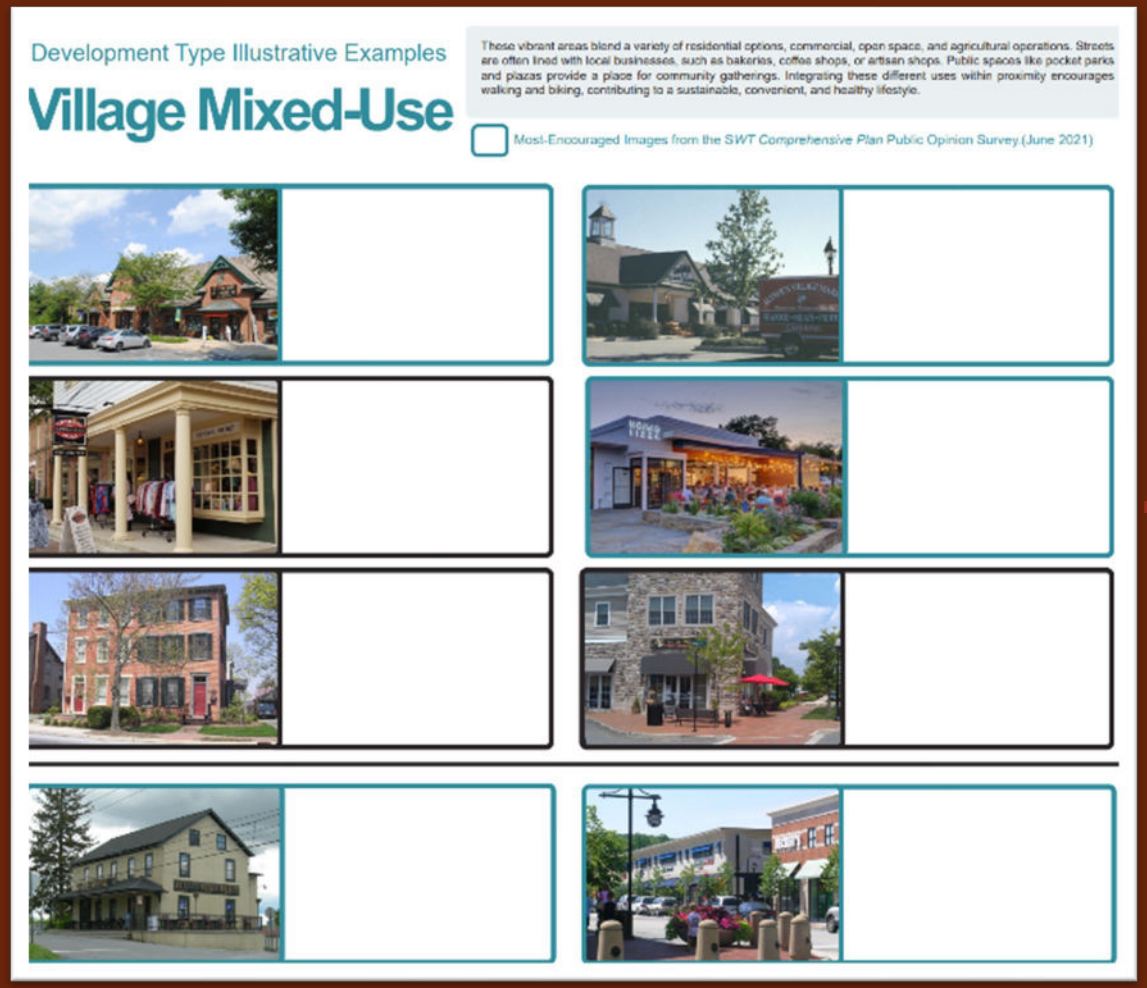

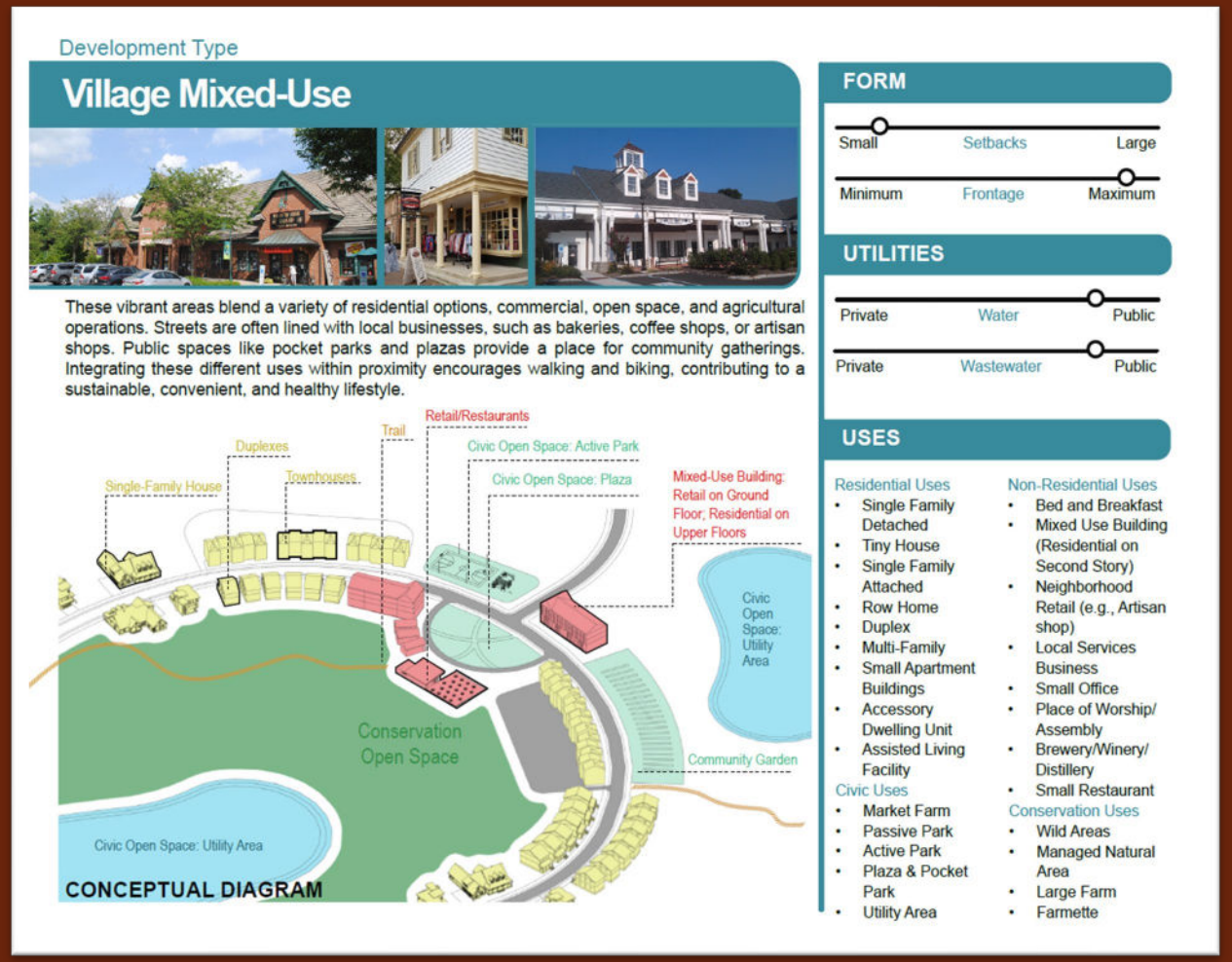

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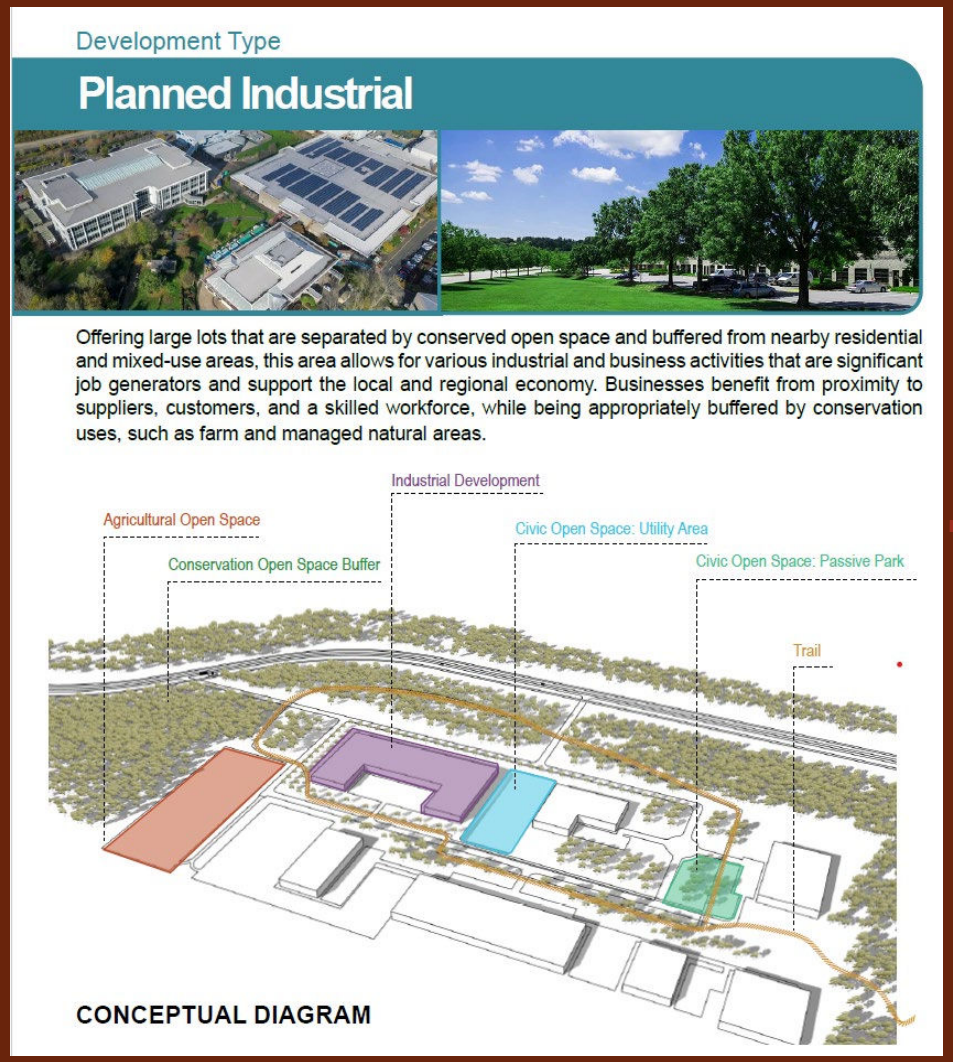
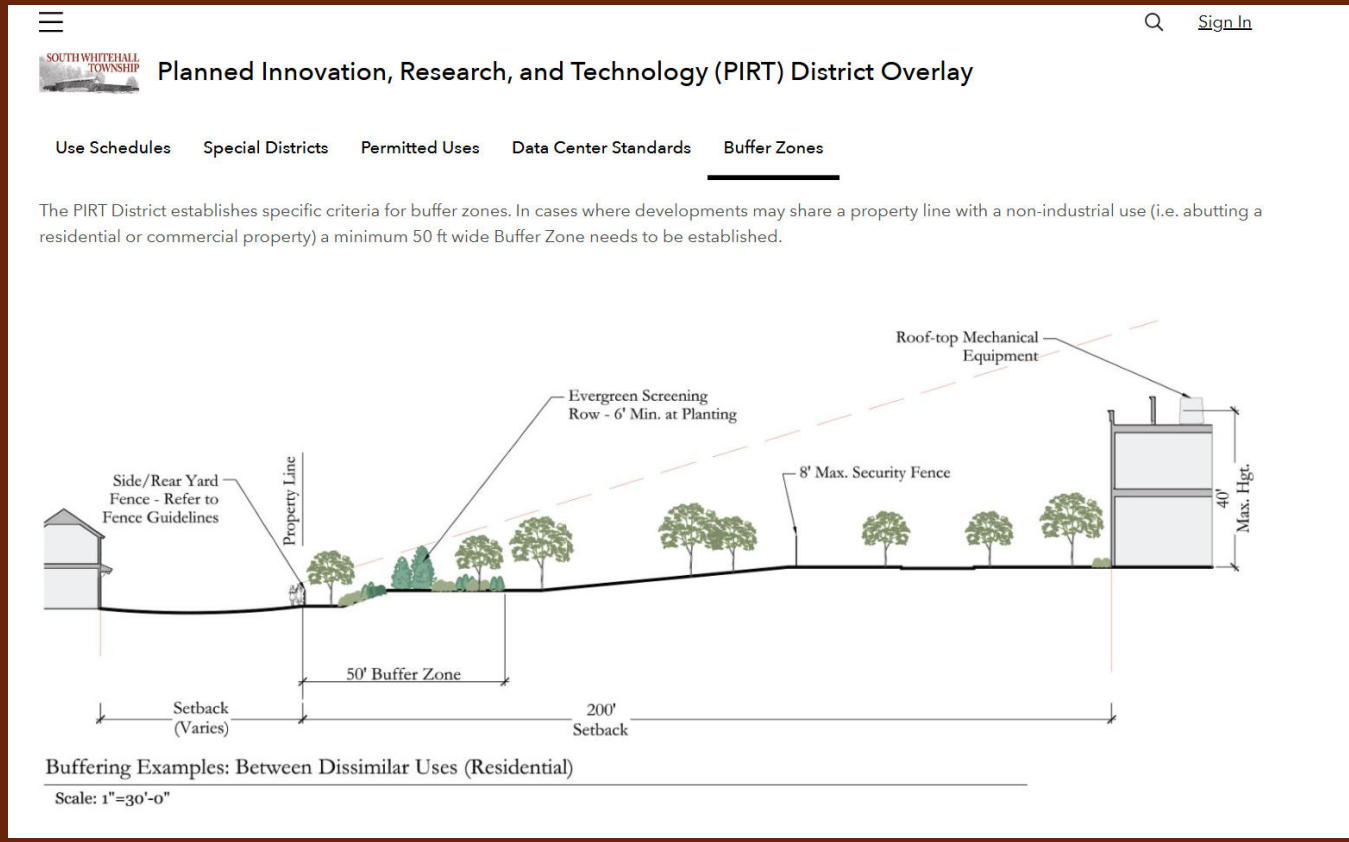




Reexamination

Reexamination

***Implementation Action - Reexamination Report (R2)**: Establish a process and timeline in accordance with recognized best management practices to periodically track progress and identify significant revisions or changes to the Comprehensive Plan.*

Why Reexamination?

During the recent comprehensive planning process, the question was raised about the status of the previous Comprehensive Plan, adopted by the Township in 2009. The community and elected officials wanted to know what had been accomplished and what impact the plan had on the community. While some of the recommendations of the 2009 plan had been completed, the structure of the plan itself made it difficult to objectively evaluate how recommendations had been implemented and what has been achieved during the lifetime of this plan.

This question of measuring impact and tracking progress has led to the discussion of needing to revisit the Comprehensive Plan on a more frequent basis and regularly reviewing progress. Implementation Item R2 calls for the Township to establish a process for a Reexamination Report, which would trigger a periodic review of the Comprehensive Plan and provide an opportunity to summarize progress to date. Additionally, this Reexamination Report will highlight the status of Implementation Items and call for any changes, additions, or alterations to be made to the action plan, so that progress is not only tracked, but also pursued. This allows the Township Planning Commission, Board of Commissioners, and Community Development Department to pause and reflect on how the proposed actions continue to fulfill the goals of the Comprehensive Plan, while also taking a moment to celebrate any successes.

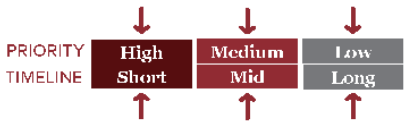
This standalone document is a compliment to the Planning Commission Annual Report, which serves its own purpose and is updated in a format consistent with the MPC. At a minimum the Planning Commission and Community Development Department shall review this document annually, typically following the completion of the Planning Commission's annual report. If a significant change or high-impact project has occurred in the Township, the Planning Commission always has the option to review the Reexamination Report more frequently as needed.

Implementation Update

Implementation Plan

The Implementation Plan was developed to be a prioritized, goal-oriented list of actions that the Township should take to ensure the vision developed in the Comprehensive Plan is fulfilled. These Implementation Items were developed to inform decision-makers and staff of the steps, timing, resources, and partners necessary to implement.

This Implementation Plan is intended to be dynamic and laid out in a way that is easy to track progress and make adjustments as necessary. The matrix on the following pages is a snapshot of the original 26 individual Implementation Items from the Comprehensive Plan and their status as of March 2025. Each item was given a priority level and anticipated timeline at the time the Comprehensive Plan was originally adopted. The timeline, priority, and details of the items in the matrix on the next page have not been updated since the Comprehensive Plan was adopted.



PLAN ELEMENTS

Elements highlighted in red are impacted by the proposed implementation item

On the pages following the Implementation Plan matrix are summaries of current South Whitehall Township or regional projects and initiatives that support one or multiple Implementation Items from the original plan. These projects and initiatives should be used as a guide to update or develop new actions for the Implementation Plan.

The Implementation Item Status is color coded according to the following:

Grey/White	Red	Yellow	Green	Blue
No action as of yet	Delayed/Attention	Pending Action	On Track	Complete

Items initially marked as Short Term are highlighted in red.

Reexamination

- Question 1: What are the major problems related to land development in the Township since adoption of the Comprehensive Plan?
- Question 2: To what extent have these problems be reduced on increased?
- Question 3: To what extent have there been significant changes to the goals and objectives of the Comprehensive Plan?