

2015 Report on State Planning Issues



Prepared for the Governor &
the 148th General Assembly

Presented by
The Cabinet Committee
on State Planning Issues

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Acknowledgements

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This report has been prepared by the Delaware Office of State Planning Coordination, in concert with and on behalf of the Cabinet Committee on State Planning Issues, in accordance with [29 Delaware Code Chapter 91](#). The Cabinet Secretaries and state agency staff provided data, ideas, expertise, and editorial comments to the OSPC staff to assist in the preparation of this report.

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STATE OF DELAWARE
EXECUTIVE DEPARTMENT
OFFICE OF STATE PLANNING COORDINATION

October 1, 2015

Dear Governor Markell and the Members of the 148th General Assembly,

On behalf of the **Cabinet Committee on State Planning Issues** I am pleased to present this 2015 Report on State Planning Issues. This report details our activities over the past year and presents an agenda for the current program year. The activities highlighted in this report demonstrate how our office and the state agencies continue to work toward implementing Governor Markell's land use agenda (outlined on page 2 of this document) to create a more efficient and effective government, which in turn fosters economic growth and enhances our quality of life.

With this report, we are excited to highlight several initiatives we feel will promote both the Governor's and the Cabinet Committee on State Planning Issues' goals and objectives for land use as noted here:

- **Downtown Development Districts (DDD):** The Downtown Development District Act was created to leverage state resources in a limited number of designated areas in Delaware's cities and towns to: spur private investment in commercial business districts and other neighborhoods; improve the commercial vitality of our cities and towns; and, help build a stable community of long-term residents in our downtowns and other neighborhoods. In January the Governor designated Wilmington, Dover, and Seaford as the first three DDDs. The first round of large project grant reservations utilized \$5.6 million of state funds to leverage over \$114 million in private investment.
- **FirstMap—Delaware's Enterprise GIS System:** The Office of State Planning Coordination (OSPC) worked closely with the Department of Technology and Information (DTI) and many other state agencies in developing First-Map, which is a system that revolutionizes the way geospatial data is stored and accessed. The biggest accomplishment for FirstMap this year was the development of a statewide geo-coding service. This geo-coding service was built using the authoritative address source data from the three counties and allows GIS users the ability to geo-locate a list of addresses without incurring the costs associated with using fee-based geocoding software from ESRI. This saves the state a significant expense.
- **Strategies for State Policies and Spending:** In accordance with Executive Order #26, the *Strategies for State Policies and Spending* document and maps are being updated. The OSPC has worked with the state agencies and local governments to collect updated data and maps. The draft will be reviewed by the Cabinet Committee on State Planning Issues before being released for public review in the fall of 2015.

As this report shows, the **Cabinet Committee on State Planning Issues** along with the OSPC and other state agencies remain dedicated to working with our local governments to achieve a vision of Delaware that keeps it a great place to live and work while supporting an environment that grows businesses and preserves our critical natural and fiscal resources through sensible land use planning practices. Feel free to contact my office if you have any questions or comments concerning this report.

Sincerely,

Constance Holland, AICP
Director, Office of State Planning Coordination

Purpose of Report

As required by 29 Delaware Code Chapter 91 § 9101 (d), the Cabinet Committee on State Planning Issues (CCSPI) is to provide a report to the Governor and General Assembly on its recent activities as well as propose legislative and/or administrative changes to improve the general pattern of land use within Delaware.

This report highlights the outcomes of the Committee's support, through their representative agencies, of implementing the *Strategies for State Policies and Spending*, including a brief analysis on development and demographic trends that support the recommendations for future action contained herein.



New homes under construction
in Smyrna

The Office of State Planning Coordination

This report is prepared by the Office of State Planning Coordination (OSPC) on behalf of the CCSPI. The OSPC reports to the Governor's Office and works closely with the CCSPI. The OSPC's mission is the continual improvement of the coordination and effectiveness of land use decisions made by state, county, and municipal governments while building and maintaining a high quality of life in the State of Delaware.

The OSPC meets its mission through

- ◆ Coordinating state, county, and local planning efforts.
- ◆ Coordinating state agency review of major land-use-change proposals prior to submission to local governments.
- ◆ Researching, analyzing, and disseminating information concerning land use planning.
- ◆ Meeting the information and resource needs of all state agencies and local governments.
- ◆ Coordinating the spatial data and geographic information (GIS) needs of state agencies and local governments.

The Governor's Land Use Agenda

Governor Markell recognizes the important role that land use planning has in implementing his overall agenda and has focused his land use agenda—as elaborated on in the 2010 *Strategies for State Policies and Spending*—around the following principals:

- ◆ **Develop a More Efficient and Effective Government** by coordinating local land use actions with state infrastructure and service delivery, largely through implementing the *Strategies for State Policies and Spending*.
- ◆ **Foster Economic Growth** by enabling a predictable and transparent land use review and permitting process and leveraging state and local investments in infrastructure.
- ◆ **Improve Educational Opportunities** for Delaware's children by working with school districts and local governments to locate new schools in cost-effective neighborhood settings in accordance with the *Strategies for State Policies and Spending* and local government comprehensive plans.
- ◆ **Enhance the Quality of Life for All Delawareans** by creating "Complete Communities" rich in amenities and services, encouraging a range of choices for residence and businesses, and protecting natural resources and our agricultural economy.



New optics lab at Delaware State University

Land Use Planning in Delaware – A Brief Overview

- ◆ Land use decisions are made at the county and municipal levels.
- ◆ The majority of infrastructure and services needed to support such decisions are provided by the state.
- ◆ The guiding documents for land use decisions are the local comprehensive plans, which are reviewed at least every five years and updated at least every ten years.
- ◆ Comprehensive plans are legal documents with the force of law, requiring development to be consistent with certified comprehensive plans.
- ◆ Comprehensive plans must be implemented within 18 months of adoption by amending the official zoning map(s) to rezone all lands in accordance with the uses and intensities of uses provided for in the future land use element of the comprehensive plan.
- ◆ The state's overall guide to land use policy is articulated in the *Strategies for State Policies and Spending*, which is updated every five years.
- ◆ The comprehensive plans are certified by the state as to their consistency with the state land use policies as articulated in the current *Strategies for State Policies and Spending*.
- ◆ The Preliminary Land Use Services (PLUS) review process coordinates land use with local governments, whereby major land use change proposals, e.g., large subdivisions proposals, comprehensive plan amendments and comprehensive plan updates are reviewed by state agency representatives along with local government representatives and developers.



Penn Cinema Riverfront, located at the riverfront in Wilmington, features the state's only IMAX® Theatre.

The Policy Framework for Land Use Planning in Delaware

Background

One of the major goals for land use planning in Delaware is to direct development to growth areas as agreed to by state and local governments as articulated in the *Strategies for State Policies and Spending* and local comprehensive plans. These are areas where state, county, and local governments are prepared for development with existing infrastructure and/or where infrastructure investment is planned.

We continue to make progress toward this goal due to the many significant actions that have occurred since the mid 1990s, which have led to a more efficient land use planning process, including the reestablishment of the Cabinet Committee on State Planning Issues, the development of the PLUS process, and the development of the *Strategies for State Policies and Spending* in 1999 (updated in 2004, 2010, with another update currently underway to be completed in 2015). Also, the local comprehensive planning process was strengthened through legislation that included giving comprehensive plans the force of law, the creation of a comprehensive-plan certification process, a requirement to implement approved comprehensive plans, and other related initiatives.

Since 2008 the state has been collecting development data from local governments to track just how well our efforts are paying off. This information is provided for in the Annual Reports in **Appendix A - Development Trends and Data Analysis**. The results are very encouraging because from 2011-2014 86 percent of the residential building permit activity was within the Levels 1-3 areas.

The State Role in Land Use

Delaware is growing and changing, in population size, composition, and where people live. Though land use decisions are made by local jurisdictions (municipal and county), the impact of local government land use decisions, land development patterns, and each Delawarean's decision of where to live affects us all statewide. The effect can be felt both fiscally—as taxpayers—and in the livability of our state.

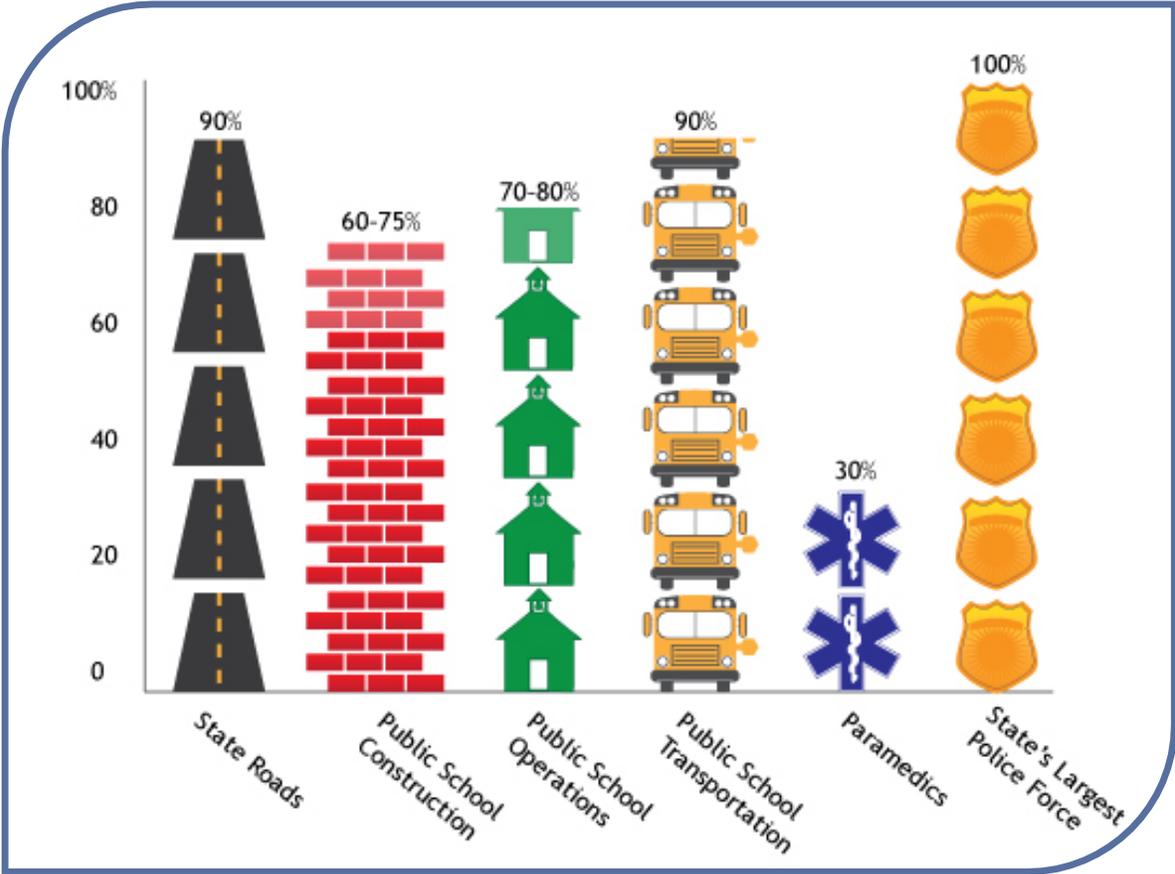
Unlike most other states, Delaware's state government provides many of the services and a great deal of infrastructure throughout the state:

- ◆ **Roads and Other Facilities** – The state maintains approximately 90 percent of Delaware roads, as compared to a national average of 20 percent. This includes more than 13,000 lane miles, 1,600 bridges, 1,100 traffic signals, 54 Park-and-Ride facilities, and 250,000 signs.
- ◆ **Schools** – The state provides between 70 and 80 percent of school operating funding and provides between 60 and 75 percent of educational-facility capital-construction funding, depending upon a local school district's relative property wealth.
- ◆ **School Transportation** – The state provides 90 percent of school transportation costs.
- ◆ **Police and Paramedic Services** – The State Police is Delaware's largest police force, and the state provides 30 percent of paramedic funding to local jurisdictions.

In addition to the services already mentioned, the state also provides the following:

- ◆ **Service Centers** – The state funds 15 State Service Centers that deliver more than 160 programs and services on approximately 635,000 visits annually.
- ◆ **Delaware Transit Corporation (DTC)** – In 2014 just over one million paratransit trips were made by DTC with 303 paratransit buses at a per-person cost to the state of approximately \$58, compared to approximately \$6 per person cost of a fixed-route DART bus ride with about 9.9 million riders.

The state government has a large stake in where and how land is developed, and as such, the cost of providing these services is greatly affected by our pattern of land use. In general, the more spread out we are, the more costly it is for taxpayers. Thus, for the state to allocate resources efficiently, we need to determine a clear path to our goal of conserving our fiscal and natural resources. If state and local governments aren't working together, a great deal of waste and inefficiency can occur. The two most important documents to insure a coordinated approach are the local comprehensive plan and the *Strategies for State Policies and Spending*.



As illustrated above, Delaware's State government provides many services and infrastructure needs throughout the state

Cabinet Committee on State Planning Issues

One of the most significant actions in regard to improving the coordination of land use activities was the re-establishment of the Cabinet Committee on State Planning Issues in 1994. The Committee's primary purpose is as an advisory body to promote the orderly growth and development of the state, including recommending desirable patterns of land use and the location of necessary major public facilities. In essence, the mission of the Cabinet Committee is to advise the Governor and General Assembly on coordinating the state's provision of infrastructure and services with the land-use decision-making process that is controlled by local governments.

The *Strategies for State Policies and Spending*

The *Strategies for State Policies and Spending*, last updated in 2010 and currently being updated in 2015, is the key policy document that provides a framework for land use planning in Delaware. Developed by the Cabinet Committee on Planning Issues to fulfill its directives under Title 29, Chapter 91 of the Delaware Code, the *Strategies for State*

Policies and Spending provide a framework for the infrastructure and service investments by state agencies. The *Strategies for State Policies and Spending* is used in a variety of ways, including for state agency capital budgeting, PLUS reviews, school site reviews, and public facility locations. Local governments rely on this document for the preparation of comprehensive plans, especially as they relate to Titles 9 and 22 of the Delaware Code and are certified by the state as directed by Title 29, Chapter 91 of the Delaware Code.

The Preliminary Land Use Services (PLUS) Review Process

Another tool developed to coordinate state- and local-government land use activities is the PLUS review, which looks at certain size development activities, comprehensive plan updates, and amendments. This is a monthly review process that brings state and local land use officials together with developers to review development proposals and feasibility studies in the earliest stages of the development process to note possible issues and make suggestions before a developer has invested substantial funds in a project.

Strategies Purpose

To coordinate land use decision-making with the provision of infrastructure and services.

Why Coordinate?

Land use decisions are a local responsibility.

The provision of infrastructure and services is a State responsibility.

If the above aren't coordinated, then waste and inefficiency can occur.

Highlights from 2014-2015

State government has worked on a variety of projects and initiatives during the 2014-2015 time period in accordance with the Governor's agenda. The Office of State Planning Coordination (OSPC) has carried some of these initiatives out, while others are programs and functions administered by the various state agencies. This section includes a summary of the most noteworthy activities that have occurred this year.

Downtown Development Districts 2015: A Year in Review

In April of 2014 the General Assembly passed Senate Bill 191, the Downtown Development Districts Act of 2014 (the Act), which was subsequently signed by the Governor on June 5, 2014. This Act created the Downtown Development Districts program. The program seeks to revitalize the downtown "Central Business District"¹ in selected city, town, and county areas through the use of economic and other incentives. The purposes of the Act are to:

- ◆ Spur private capital investments on commercial business districts and other neighborhoods;
- ◆ Stimulate job growth and improve the commercial vitality of districts and neighborhoods;
- ◆ Help build a stable community of long-term residents by improving housing opportunities; and,
- ◆ Assist municipalities in strengthening neighborhoods while harnessing the attraction that vibrant downtowns hold for talented people, innovative small businesses, and residents from all walks of life.

A variety of economic and other incentives were envisioned to achieve the purposes of the Act. The primary state-level incentive is the Downtown Development District Grant Program. These grants are to be made available to offset up to 20 percent of the "hard costs" associated with construction or redevelopment activities in Downtown Development Districts (DDD). The Delaware State Housing Authority (DSHA) has been designated to administer the grant program. The legislature funded the grant program with \$7 million in FY15, and an additional \$8.5 million in FY16. In addition to the DDD grants, it is expected that local governments and state agencies will also develop incentives to encourage redevelopment in DDD areas. Kent County has developed a grant program as well, tied to the state DDD program.

The Act identified a process for a local government to become designated as a Downtown Development District. The OSPC is to organize and manage an application and review process to enable local governments to apply to become a DDD. The completed applications are then forwarded to the Cabinet Committee on State Planning Issues (CCSPI), which is to make a recommendation to the Governor. The Governor may then designate districts at his discretion, after considering the recommendation of the CCSPI. In the first program year the Act stipulates that the Governor may designate between one and three districts, and that the first three districts must be located in each of Delaware's three counties.

After a public comment period, the OSPC released the "Application for Designation as a District" on August 1, 2014. It was due to be submitted by November 1, 2014. Completed applications were received from nine local governments: Clayton, Dover, Middletown, Milford, New Castle County, Newark, Seaford, Smyrna, and Wilmington.

¹ Central Business District: An area around the downtown portion of the city or town allowing for higher intensity residential uses as well as commercial, office, personal services, governmental, and similar uses intended to serve the community and surrounding areas of the city or town.

The applications were to be evaluated on three criteria, as specified in the Act: the need and impact (50%), the quality of the district plan (30%) and the local incentives (20%). The OSPC reviewed all of the applications and prepared staff reports for each application. These reports were forwarded to the CCSPI, along with the completed applications and other materials submitted by the local governments.

The CCSPI held a meeting on January 6, 2015 to consider the applications and make their recommendation to the Governor. Each applicant was given a chance to make a presentation to the CCSPI at this meeting. The CCSPI recommended three local governments for designation as a district: Wilmington, Dover, and Seaford. The CCSPI praised the quality of all applications, but reasoned that the high level of need demonstrated by these three municipalities distinguished their applications.

On January 11, 2015 Governor Markell announced the designation of Wilmington, Dover, and Seaford as Downtown Development Districts. Events to celebrate the designations were held in each community.

The DSHA wasted no time in developing the District Grant Program. The program features a rolling application period for “small projects” under \$250,000 and a reservation process for larger projects. The reservation process allows the funds to be encumbered for the project, providing investors with certainty that funds will be available when their project is completed.

The program has already had a significant effect on redevelopment efforts in each community. Applications for large project reservations were due on March 20, 2015. On April 29, 2015 Governor Markell announced the awarding of reservations for 13 large projects in all three Districts. These projects will receive \$5.6 million of state-grant funds and leverage over \$114 million in private investment. These projects include a variety of housing, mixed use, and commercial projects, ranging from an affordable senior housing facility to a 200-unit apartment building and even a residential project with a marina. A full list of recipients is included in Table 1. The DSHA will open another application period for large project reservations in September of 2015, and hopes that the Governor will be able to announce the recipients by December.



*New homes under construction on Kirkwood Street in Dover.
These homes were made possible by DDD grants.*

Table 1. DDD Large-Project Grant Reservations, 2015, Round 1

Investor	District	Eligible Use	Total Project	Grant Reservation
Central Delaware Habitat for Humanity	Dover	Residential	\$680,300	\$75,150
G & J Holdings, LLC	Dover	Mixed-use	\$469,590	\$88,918
The Residents and River Place, LLC	Seaford	Residential	\$11,413,235	\$671,000
608 Market, LLC	Wilmington	Mixed-use	\$7,698,809	\$528,000
627 Market, LLC	Wilmington	Mixed-use	\$11,851,171	\$585,000
Connections CSP	Wilmington	Residential	\$3,874,784	\$311,506
Delmar Affordable Housing Partners	Wilmington	Residential	\$6,310,671	\$400,977
Historical Society of Delaware	Wilmington	Commercial	\$6,800,000	\$362,302
Market Street Village, LLC	Wilmington	Mixed-use	\$29,122,842	\$757,000
Midtown Parking, LLC	Wilmington	Commercial	\$25,922,644	\$1,000,000
Sacred Heart Village II	Wilmington	Residential	\$8,071,166	\$557,000
STM II	Wilmington	Mixed-use	\$327,205	\$60,441
Wilmington Housing Partnership	Wilmington	Residential	\$1,934,219	\$243,911
			\$114,476,636	\$5,641,205

Neighborhood Building Blocks Program

The Neighborhood Building Blocks Fund consists of \$1,000,000 allocated from a settlement agreement with JP Morgan Chase & Co. designed to remedy harm caused by the 2008-09 financial crisis. The fund is administered by the Neighborhood Building Blocks Board, consisting of representatives from the Delaware Economic Development Office (DEDO), the Delaware Department of Justice (DDOJ), the Delaware State Housing Authority (DSHA) and the OSPC. The board invites neighborhood revitalization programs, neighborhood associations, community groups, law enforcement, local governments, or other stakeholders working for community development to apply for funding from The Neighborhood Building Blocks Fund.

The Neighborhood Building Blocks Fund is intended to support crime reduction, neighborhood revitalization, and economic development programs statewide, including programs in and around DDDs and communities that are part of DDOJ's Building Blocks Initiative. Building and maintaining strong neighborhoods requires thoughtful and coordinated efforts of state and local governments, neighborhood associations, nonprofit and community organizations, and other stakeholders to enhance economic development, reduce crime, and otherwise improve the quality of life of residents in our communities.

In order to support local governments that are planning for DDDs, \$350,000 of the \$1,000,000 total grant pool was reserved for DDD planning grants. Between December of 2014 and June of 2015, a total of 40 grant applications were received and reviewed, including 9 DDD related applications and three other planning related grant applications. The DDD and other planning related applications were approved, totaling \$327,734.

Table 2 details DDD and other planning related grants from the Neighborhood Building Blocks fund.

Table 2. Planning-Related Neighborhood Building Blocks Fund Grants 2015

Applicant	Activity	Amount Granted
DDD Grants		
New Castle County	Reimbursement for costs incurred in preparation of District Plan for Rt. 9 Innovation District	\$25,000
Wilmington Housing Partnership	Reimbursement for costs incurred in preparation of DDD application for City of Wilmington	\$50,000
Town of Georgetown	Funding to hire consultant to develop a District Plan for downtown Georgetown	\$45,000
Town of Smyrna	Reimbursement for costs incurred in preparation of DDD application for Town of Smyrna	\$9,536
Town of Dagsboro	Funding to hire consultant to develop a District Plan for downtown Dagsboro	\$36,000
City of New Castle	Funding to hire consultant to develop a District Plan for downtown New Castle	\$46,500
City of Harrington	Funding to hire consultant to develop a District Plan for downtown Harrington	\$40,000
Town of Clayton	Reimbursement for costs incurred in preparation of DDD application for Town of Clayton	\$5,214
City of Dover	Funding for implementation of DDD in Dover, including marketing and branding the District and developing a Western Capital Gateway Plan	\$15,000
Other Planning Grants		
Town of Delmar	Update for DelMar Comprehensive Plan. DDD planning will be included in update.	\$6,000
Town of Laurel	Update for Laurel Comprehensive Plan. DDD planning will be included in update.	\$25,200
Claymont Renaissance Development Corp.	Update of Claymont Community Redevelopment Plan	\$24,284
<i>Total, all planning related</i>		\$327,734

The General Assembly did not provide additional funding for the Neighborhood Building Blocks Fund in FY16. The Board will be meeting this fall to consider pending grant applications and determine which, if any, can be funded with remaining grant resources.

Delaware Coalition for Healthy Eating and Active Living (DE HEAL)

DE HEAL supports and encourages programs, environments, and resources that promote healthy eating and active living to reduce the prevalence of obesity and related chronic diseases. DE HEAL is made up of a network of partners and members, including state agencies. State agencies actively participate in DE HEAL with the Environment and Policy subcommittee, which focuses on how the physical environment affects our health. Key programs in this regard are listed below.

- ◆ **PLUS Development Checklist:** DE HEAL was instrumental in formulating a development checklist used to assess PLUS applications. The Division of Public Health uses the checklist in order to assist in developing comments on residential site plans and subdivisions through the PLUS process. The checklist focuses on three primary concepts that link land use planning and public health: 1) Active Transportation, 2) Active Recreation, and 3) Access to Food Choice. In the coming year the DE HEAL Environment and Policy Committee will be working on a version of the checklist that can be used for commercial developments and another for comprehensive plans.
- ◆ **Educational Outreach:** Another DE HEAL project this past year has been educational outreach about the link between public health and land use planning. DE HEAL members have participated in a number of educational presentations to the New Castle County Planning Board focusing on topics such as transportation, recreation, comprehensive planning, and ordinances. DE HEAL is actively working with New Castle County as they update their Unified Development Code to ensure that public health concerns are embedded within the principals and regulations of that ordinance.

New Comprehensive Plan Checklist and Municipal Comprehensive Plan Guide

The OSPC revised the checklists and guidance provided to local governments about comprehensive planning. There were previously two checklists, one for towns with a population under 2,000 and one for towns with a population over 2,000. The current revision collapses the two checklists into a single, one-page checklist and a more detailed guide containing information on how to address code requirements and other planning elements. The new guide also includes links to many other online resources that can help local governments as they prepare plans. The requirements for towns over and under the 2,000-population threshold are clearly identified on the checklist and throughout the guide.

Master Planning Activities

A “master plan” can be defined as a land use plan focused on one or more sites within an area, which identifies access and general improvements and is intended to guide growth and development over a number of years or in phases. Master planning is a tool that can benefit Governor Markell’s land use agenda to make government more efficient, promote economic development, and, in general, improve the quality of life for Delaware citizens. Such a plan can do this because of the involvement of a wide range of stakeholders, both public and private. In many cases, the process of master planning can work toward pre-approving an area to be “shovel-ready.” “Shovel-ready” permitting gives such areas a distinct advantage in attracting economic-development activities. There are several major efforts underway at this point in all three counties.

- ◆ **Milford Master Plan:** The plan was adopted in July of 2011, and the city has begun the implementation process. Significant infrastructure projects have been completed and are underway as envisioned by the Master Plan. Last year, DelDOT completed the construction of the Route 1

and Route 30 grade-separated intersection. This improvement will enhance the safety of that intersection, as well as provide safe access to the east of Route 1. The City of Milford has almost completed the construction of water-system upgrades in the southern portion of the city, which will provide service to the Master Plan area. The upgrades will include new water mains, a well, and a water tower to serve this area. Both of these significant infrastructure investments will further the goal of making the master plan area “shovel ready” for economic development. The plan and subsequent infrastructure improvements have already attracted a major project to develop in the master plan area. In November of 2014, the Bayhealth Medical Center announced plans to construct a \$250 million state-of-the-art health campus on lands within this area, just west of the new grade-separated intersection. The facility will be served by the new water system and other utilities planned for in the master plan. More information and updates about Bayhealth’s project can be found on their website at www.ImagineDE.com.

- ◆ **Town of Smyrna Route 13 Corridor Plan:** The Town of Smyrna adopted the Route 13 Corridor Plan on June 17, 2013, as an amendment to the town’s Comprehensive Plan. This plan was developed as a partnership between the town, the Dover/Kent Metropolitan Planning Organization (MPO), DelDOT, and the OSPC. It creates a vision for the entire Route 13 corridor by addressing transportation, land use, and urban design issues. The town recently completed constructing a sewer and water system to extend along this northern corridor and it is hoped that the availability of utilities will encourage development and redevelopment in accordance with the corridor plan. Phase I is complete, which involved installing sewer and water lines under Duck Creek and constructing a pump station. The second phase, which is underway, involves installing the utilities along the corridor and connecting customers. In order to ensure the urban design goals expressed in the plan are achieved, the town has adopted a new zoning ordinance that contains elements of a form-based code.

The plan and infrastructure improvements have already contributed to attracting new commercial uses to the corridor. These new uses will involve the redevelopment of blighted properties, new construction on greenfield sites, and the fit out of existing shopping centers. New establishments will include big-box retail, national chain restaurants, retailers, hotels, and local businesses including a recently announced “gastro-pub/brewpub” in the Commodore Commons shopping center.

- ◆ **Fort DuPont Complex Master Plan:** In 2013, the State of Delaware Department of Natural Resources and Environmental Control (DNREC), in collaboration with the City of Delaware City, led a master planning process to revitalize the historic 325-acre Fort DuPont Complex. The result of that process was the creation of a master plan (the Master Plan) to serve as a blueprint to transform the Fort DuPont Complex into a vibrant mixed-use community, fully integrated with the adjacent Delaware City with plans to annex the property into the city. The Master Plan establishes a shared community vision and implementation strategy to evolve Fort DuPont into a model “live-work-learn-play and visit” community. This long-term vision for the reuse of Fort DuPont builds upon the site’s National Historic District status, the existing assets of the State Park, and the area’s extraordinary cultural, natural, and recreational amenities. In 2014, the Delaware General Assembly passed and the Governor signed the Fort DuPont Redevelopment and Preservation Act, 7 *Del.C.* §§ 4730 *et seq.* (the Act), which authorized the creation of the Corporation to manage, oversee, and implement the redevelopment and preservation of the Fort DuPont Complex. Under the Act, the Corporation—a public instrumentality of the state created for the purpose of exercising essential governmental functions—is governed by an 11-member board of directors, with 7 representatives of state government, and 4 Delaware City representatives. The Act further authorizes the creation of a 13-member advisory council to provide specific subject-matter expertise to the board of the Corporation. An Executive Director has been hired to lead this redevelopment effort.



This rendering from the Fort DuPont Master Plan shows land use distinctions.

- ◆ New Castle County, in collaboration with other entities, has a number of master planning activities underway:
 - **Glasgow Avenue Main Street Study:** WILMAPCO, DeIDOT, and New Castle County have started a year-long transportation and land use study for Glasgow Avenue, between US 40 and SR 896/Porter Road (about 1.3 miles). The study is intended to create a “Main Street” vision plan to guide transportation improvements and land use along Glasgow Avenue.
 - **North Claymont Area Master Plan:** The North Claymont Master Plan Area has a mix of industrial, commercial, residential, and open space land use and is located to the north and east of the Claymont Hometown Overlay District. Notable sites for redevelopment include the Tri-State Mall (41 acres) and former Claymont Steel (425 acres). The Master Plan analysis will examine the potential for redevelopment to support economic development; access to jobs; retail and services; and transportation by road, rail, water, and transit as well as walking and bicycling. The analysis will assess the potential for a mixed-use residential, commercial, and industrial area designed to promote economic activity, make public transit successful, walking and bicycling convenient and safe, and provide for a vibrant, livable community.
 - **SR 141 20-Year Transportation and Land Use Plan:** The New Castle County Department of Land Use, DeIDOT, and WILMAPCO have initiated a planning study about the future of transportation and land use development in the Route 141 corridor. The outcome of this process will be a consensus-based plan, which will guide transportation and land use policy for the corridor over the next twenty years.
 - **Route 9 Corridor Study:** A study of the Route 9 corridor north of New Castle is slated to begin in the fall of 2015. New Castle County has committed to building a state-of-the-art public library along the corridor and looks forward to the opportunity to utilize comprehensive corridor planning to help revitalize this distressed area.

Geospatial Coordination

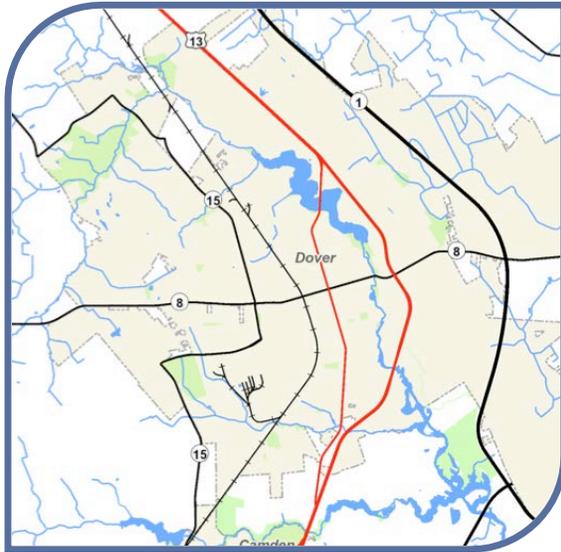
The Delaware Geographic Data Committee (DGDC) is a cooperative effort among the government, academic sector, and private sector to build a Delaware GIS (Geographic Information System) Community and improve the coordination of the use of GIS tools and spatial data in Delaware. The DGDC is established in Delaware state law at 29 [Delaware Code](#), Chapter 91, Subchapter IV to ensure the availability of geospatial data, promote the use and sharing of that data and of GIS software and tools, establish data standards, and support a community of geospatial data providers and geospatial data users in Delaware.

FirstMap (Centralized Geospatial Data Consolidation)

FirstMap launched in September 2014 and is the repository into which all public geospatial data will be housed for the state. The data is accessible to all state, county, and local agencies as well as the public. The system provides the single, authoritative data source for all state agencies as well as the public.

Data available in the system is updated on a regular basis (agency and data specific) to assure the most current data is always being used for mapping and applications throughout the state.

In addition, FirstMap has an ArcGIS Online presence to provide agencies with the ability to create quick and easy maps to share with their constituents. Several agencies have produced Online Maps to serve their constituents over this past year. Other applications, which require customized enhancements, will continue to be available to the agencies with capability to develop them.



Base map image from FirstMap

Since last year's annual report, FirstMap has launched the following enhancements to provide GIS users in Delaware with the tools and data they need for their daily work:

- ◆ **Open Data** – This online application allows users to access and download datasets in a variety of data formats for use outside the state network. It also provides a data catalog that is searchable and discoverable to outside agencies.
- ◆ **Geo-coding Service** – This long awaited service was put on line for state agencies as well as the public to geo-code addresses using county maintained addressing data.
- ◆ **Standardized Base Map** – FirstMap now offers a standardized base map for the state to provide the appropriate backdrop of our maps. This saves the GIS users the time normally spent symbolizing all the various base layers. It also provides a standard look and feel to maps prepared by state agencies.
- ◆ **Data Publication** – Many state agencies have partnered with FirstMap to publish the data for feature and web services and also for download (where appropriate). The data publication continues to grow as agencies begin using FirstMap on a daily basis.

In addition to FirstMap, subcommittees of the DGDC continue to work on the following projects:

- ◆ **Land Use Land Cover (LULC) Data Collection:** The 2012 LULC dataset was delivered in late September 2014 and is now available through FirstMap.
- ◆ **Long-term Funding Plan:** The DGDC still needs to work on a long-term funding plan to provide dedicated funding for the three main geospatial datasets used by everyone: 1) Ortho Imagery—high resolution aerial images; 2) LiDAR (Light Detection and Ranging)—a GIS dataset that provides elevation data for Delaware; and 3) LULC. The DGDC remains committed to coordination and fiscal responsibility regarding data.

GIS Activities

- ◆ **GIS Education:** In November 2014, the DGDC sponsored another successful GIS Day field trip for 300 fifth-grade students in Delaware. The annual event exposes students, through hands-on activities, to geospatial technology.
- ◆ **Conference:** The DGDC subcommittee coordinates a statewide GIS conference bi-annually. Our next conference is scheduled for April 2016. Planning meetings are underway.
- ◆ **United States Geological Survey (USGS):** The State of Delaware was awarded Sandy Supplemental Funds for a new round of LiDAR acquisition. (LiDAR is now our best source of elevation data.) The LiDAR data was delivered to the state in the late-spring of 2015. We are still awaiting bathymetric LiDAR for the Delaware Bay and ocean coastal areas. NOAA expects to deliver that product by the end of 2015.
- ◆ **US Census Coordination:** Delaware continues to coordinate with US Census on their Geographic Support System (GSS) initiative to assist with addressing needs for the Census. All three counties in Delaware have provided the necessary data to participate in this effort. In 2015, OSPC staff met with representatives from the US Census Bureau to discuss the **State Data Center (SDC)** program, its network, and how the OSPC can better help the SDC move forward in the program. Also in 2015, the Delaware Population Consortium and the SDC held two training workshops for our affiliates: *Census Demographic Data Resources and Census Data and Resources for GIS Users*.



The Earth Balloon Station begins to take shape on GIS Day at the Dover Air Mobility Command Museum.

State Land Inventory

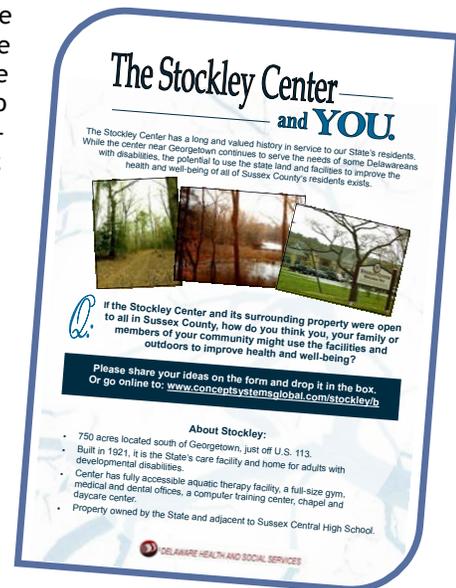
The OSPC, in collaboration with other state agencies, continues to work on an inventory of state-owned property. After much research, working with an old inventory, and collaboration with school districts and most state agencies, the inventory is almost complete. The state land inventory table is very stable and is now available on FirstMap on ArcGIS. The leasing table is also stable (except for normal changes). The OSPC is working with the Division of Accounting, as they will be required to track leasing as part of the financial reporting of the agencies.

The Insurance Coverage Office, Office of Management and Budget, and the Division of Accounting Office at the Office of Finance are all collaborating with the OSPC on the buildings table. These agencies have been trading information and updating records to form a good inventory of state-owned buildings. Due to the large volume of data and different uses of information, there is still much work complete.

Work is being done now to develop a process to keep these inventories updated. This work will also identify which group will be responsible for the updating process. The inventory itself will soon be sent to the state agencies involved for their review and any necessary changes will be made before the inventory is put online.

Stockley Center Collaborative

This 750-acre state-owned facility, located south of Georgetown, was once home to over 700 persons with disabilities and now houses less than 100 such residents. As such, an initiative started in 2011 seeks to look at a broader approach to serving the community at large with a comprehensive vision for the land and facilities. In 2013, a task force that included the Director of the OSPC issued a report that looked into stakeholder recommendations in four key areas: 1) medical, health and wellness; 2) housing and infrastructure; 3) learning and education; and, 4) recreation and community—including a model mixed-use development that would accommodate these four areas. In this report, the task force recommended that a permanent group be appointed called the “Stockley Collaborative” to be responsible for overseeing the planning and implementation of the task force’s report recommendations. Initial activities proposed by the collaborative include adding walking trails to the 750-acre campus to promote active lifestyles for Sussex County residents. The task force also recommended making the campus the center for Telemedicine so residents can have more access to a wide range of specialists without having to travel.



Climate Resiliency/Adaptation

Update on Executive Order 41

Executive Order 41, signed by Governor Markell in September 2013, directs the state to address both the causes and consequences of climate change, through the implementation of recommendations developed under the direction of the Cabinet Committee on Climate and Resiliency (CCoCAR).

The CCoCAR consists of the secretaries and directors of 11 state agencies and departments. Designated key staff from each of the 11 departments was appointed to serve on key workgroups including the adaptation workgroup, the flood avoidance workgroup, and the miti-

gation workgroup. These workgroups met throughout 2014 to address the tasks and goals outlined in Executive Order 41.

- ◆ The **adaptation workgroup** was formed and tasked with “developing agency-specific, actionable recommendations for improving Delaware’s preparedness and resilience to climate impacts.”
- ◆ The **mitigation workgroup** was a technical workgroup established to identify a greenhouse-gas mitigation target and develop an implementation plan to guide Delaware toward its goal.
- ◆ The **flood avoidance workgroup** was a technical workgroup established to develop flood avoidance and design guidance to “incorporate measures for adapting to increased flood heights and sea level rise in the siting and design of projects for construction of new structures and reconstruction of substantially damaged structures and infrastructure.”

The Climate Framework for Delaware was developed to summarize the work and recommendations from the three workgroups formed under Executive Order 41: Mitigation, Adaptation, and Flood Avoidance. The Climate Framework was approved on December 3, 2014, by the CCoCAR, for submission to the Governor by December 31, 2014, as required by the order. On March 3, 2015, Governor Markell officially announced the release of The Climate Framework for Delaware.

On April 27, 2015, the DNREC hosted the Climate Adaptation and Resilience Stakeholder Workshop to bring together stakeholders and interested members of the public to discuss next steps for implementation of the recommendations outlined in The Climate Framework for Delaware. There were 104 attendees at the workshop that represented a variety of sectors and perspectives from across the state.

Implementation of recommendations developed under Executive Order 41 is underway and include efforts to enhance climate resiliency through land use policies and programs. To support implementation of recommendations, the OSPC will:

- ◆ Provide technical support to local governments for Comprehensive Plans and local ordinances;
- ◆ Provide technical assistance to support integration of climate impacts and to reduce greenhouse gas emissions through adaptation and mitigation at the local level;
- ◆ Incorporate climate change and sea level rise as factors in the next update to *State Strategies for Policies and Spending*;
- ◆ Incorporate climate change and sea level rise impacts into the PLUS application and PLUS checklist for Comprehensive Plans; and
- ◆ Establish and maintain GIS layers related to climate change and sea level rise impacts in FirstMap.

Sea Level Rise Initiative

The Delaware Sea Level Rise Advisory Committee (SLRAC) published its *Recommendations for Adapting to Sea Level Rise in Delaware* in September 2013. To encourage and facilitate the implementation of these recommendations, a workshop was held in March of 2014, which resulted in the development of the *Preparing for Tomorrow’s High Tide: 2014 Workshop Proceedings and Interim Implementation Plan*. This document provides detailed summaries of all discussions that occurred at the workshop, including specific implementation activities that can be taken for each recommendation developed by the SLRAC. The Interim Implementation Plan can also

guide efforts by stakeholders toward sea-level-rise adaptation. Workshop results can also be used to develop partnerships, plan projects, and inform grant proposals.

Significant progress has been made toward implementing the *Recommendations for Adapting to Sea Level Rise in Delaware* at the state and local level. Governor Markell signed Executive Order 41, which in part, directed state agencies to consider sea level rise in the planning of state projects. A committee composed of affected state agencies drafted flood avoidance and design criteria to help guide state decision-making. A separate committee developed specific actions that each state agency can take to address climate change, including sea level rise.

State agencies have already taken action in many instances. The Delaware Open Space Council has incorporated sea level rise into the criteria for decisions about land conservation. Sea level rise has been incorporated into state and regional plans including the statewide Hazard Mitigation Plan, the state’s Coastal and Estuarine Land Conservation Program Plan, and the Delaware Wildlife Action Plan. Significant research is also being conducted to determine the impact of sea level rise on ground water, wetlands, and contaminated soils. A statewide survey was conducted to better understand resident’s perceptions of sea level rise and climate change.

Many recommendations approved by the SLRAC are aimed specifically at increasing the ability of municipal and county governments to incorporate sea level rise into their plans and decision-making processes. To this end, DNREC provided grant funding to communities, such as the municipalities of Frederica, Slaughter Beach, New Castle, South Bethany, and Fenwick Island to conduct projects that will increase their resiliency to sea level rise. DNREC has also provided technical assistance to the Town of Milton, and the Town of Frederica to incorporate flooding and sea level concerns into their comprehensive development plan.



Frederica Waterfront Redevelopment Strategy 2015. The plan incorporates sea level rise adaptation strategies.

DNREC has held multiple courses, trainings, and workshops to increase regional practitioner's knowledge of Sea Level Rise. In addition, DNREC, Delaware Sea Grant, and the University of Delaware's Institute for Public Administration has collaborated again on the Flood Ready Community courses about flooding and sea level rise for Delaware's Academy for Excellence in Local Government Leadership. DNREC has also collaborated with Delaware Technical Community College to develop the Sea Level Rise and Water Resources class offered to licensed drinking-water and wastewater managers as part of their licensing requirements. An additional training course was held by DNREC in partnership with Delaware Sea Grant through the National Disaster Preparedness Training Center to address appropriate hurricane planning, titled HURRIPLAN, which educated communities on resilient building designs.

In the coming year DNREC and the OSPC, along with our other collaborators, will continue to provide technical assistance, training and education opportunities, and funding opportunities to local governments and state agencies to incorporate sea level rise into their plans and decision-making and will improve the data and tools necessary for informing decision making.

Sea Level Rise in Local Comprehensive Plans

As one of the implementation recommendations from Executive Order 41, the OSPC and DNREC agreed to collaborate to provide assistance to local governments that wish to consider the impacts of sea level rise and climate change in their comprehensive plans. The Town of Frederica became the first community to do so. The town initiated the process of updating their 10-year-old comprehensive plan and realized that sea level rise was a significant concern in their community. Frederica is situated on the shores of the Murderkill River in Kent County. Certain areas of town, including roadways, currently flood during some high tides and in storm events. In addition, the industrial waterfront area in the town had been designated for redevelopment, but is currently in the floodplain. Over the course of several months the OSPC coordinated a series of workshops and planning commission meetings between the town and staff from both DNREC and DelDOT to focus on these issues and develop adaptation plans. As a result, a separate chapter in the comprehensive plan was developed to address resiliency. It included specific recommendations and land use changes (such as redesigning the waterfront redevelopment area) to address flooding and sea level rise. The plan is now pending adoption and certification. This exercise could become a template to assist other towns with adding climate change and sea level rise to their comprehensive plans.

Delaware Bayshore Initiative

DNREC's Delaware Bayshore Initiative is coordinating with DelDOT's Byway Program, DEDO's Downtown Delaware Program, Delaware Greenways, Muldrow and Associates, all of the Bayshore communities (including all of those listed below plus New Castle, Frederica, Milford, Milton, and Lewes), Delaware Division of Historical and Cultural Affairs, U.S. Fish and Wildlife Service, National Park Service, and conservation partners on a branding exercise for the Delaware Bayshore and Delaware's Bayshore Byway. A preliminary design has been developed with input from all of the communities and partners and will be finalized in fall 2015.

DNREC's Delaware Bayshore Initiative is coordinating with DelDOT's Byway Program to extend Delaware's Bayshore Byway south to Lewes. Presently, the byway follows Route 9 from the City of New Castle south to its junction with State Route 1 east of Dover. The proposed byway extension would follow State Route 1 south to Lewes and include Frederica, Milford, Milton and the spur roads to each of the Bayshore communities including Bowers, South Bowers, Slaughter Beach, Prime Hook Beach, Broadkill Beach and Lewes. Public meetings are currently underway with the communities.

- ◆ **Delaware City:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism including collaboration on a Federal Highway Scenic Byway grant to design a pedestrian and bike trail connecting Delaware City to Fort DuPont State Park.
- ◆ **Leipsic:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including development of a Farmers and Watermen Museum in town. Working in coordination with the Delaware Sea Grant Program's Working Waterfront Initiative to develop sustainability strategies for preserving and maintaining the town's traditional maritime community. The Working Waterfronts process and final report are assisting the town with revision of their comprehensive land use plan.
- ◆ **Little Creek:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including development of a small boat launch on the Little River. Working in coordination with the Delaware Sea Grant Program's Working Waterfront Initiative to develop sustainability strategies for preserving and maintaining the town's traditional maritime community. The Working Waterfronts process and final report are assisting the town with revision of their comprehensive land use plan.
- ◆ **Pickering Beach:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including design of interpretive sign to educate residents and visitors about fish, wildlife, and habitat found in and around the community.
- ◆ **Kitts Hummock:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including design of interpretive sign to educate residents and visitors about fish, wildlife, and habitat found in and around the community.
- ◆ **Bowers Beach:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including conceptual design of 2.5 acres for community open space and parking for a recently zoned commercial district and public beach access. The town is also working with the Delaware Sea Grant Program's Working Waterfront Initiative to develop sustainability strategies for preserving and maintaining the town's traditional maritime community.
- ◆ **South Bowers:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including design of interpretive sign to educate residents and visitors about fish, wildlife, and habitat found in and around the community.
- ◆ **Slaughter Beach:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including design and installation of an interpretive sign to educate residents and visitors about fish, wildlife, and habitat found in and around the community. Named the third town in the state and eighty-third community in the nation to receive certification as a *Community Wildlife Habitat* by the National Wildlife Federation in partnership with the Delaware Nature Society. Also partnering with Delaware Nature Society, DuPont Nature Center, and the Bayshore Initiative to improve nature education amenities for visiting school groups and the public.
- ◆ **Prime Hook Beach:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including design and installation of an interpretive sign to educate residents and visitors about fish, wildlife, and habitat found in and around the community.
- ◆ **Broadkill Beach:** Working with the Delaware Bayshore Initiative to accomplish goals related to ecotourism and conservation outreach including design and installation of an interpretive sign to educate residents and visitors about fish, wildlife and habitat found in and around the community.

Contract with University of Delaware's Institute for Public Administration

The OSPC continues to have a strategic partnership with the University of Delaware's Institute for Public Administration (IPA). IPA worked on several key projects this year:

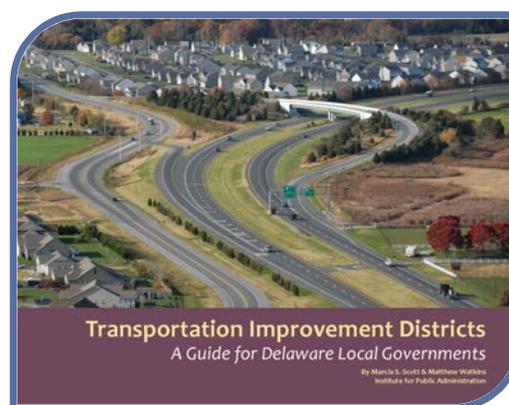
PLUS Project Review Tracking and Analysis

IPA has completed Phase 2 of a comprehensive research study using our PLUS project data and GIS-based development trends data to track the outcomes of all PLUS projects since the program's inception in 2004. The purpose of Phase 1 of this project (completed) was to develop the GIS methodology to track projects from the PLUS application through local government development approvals and eventually building permits, and then spatially analyze the locations of these active projects as it relates to the *State Strategies*. The second phase of this project involves tracking the effectiveness of the PLUS comments in a selected sample of active and completed projects, as well as process changes to our PLUS procedures in order to integrate data collection with the new FirstMap system discussed on page 14. Phase 3 of this project, expected to begin in FY16, will develop a business case to support the transition of the PLUS application and review process to an electronic format that can be directly integrated into FirstMap and our PLUS database.

Complete Communities Project

A "complete community" promotes healthy lifestyles, economic growth, and sustainability through an integrated approach to transportation, land use, and community design. IPA substantially expanded content on its *Delaware Complete Communities Planning Toolbox* (www.completecommunitiesde.org), which provides information on complete-communities planning approaches, community design tools, and public engagement strategies. New topics include the Americans with Disabilities Act, transit improvement districts, walkable communities, infill and redevelopment, mixed-use development, planning for aging-friendly communities, parks and recreation master planning, placemaking, economic development, downtown development districts, GIS story maps, green building practices, and rural land management.

Many complete communities concepts have been integrated into the *Delaware Planning Education Program*. A Planning for Transportation Improvement Districts, Downtown Development Districts, and Market-Ready (Re)Development (Planning 202) workshop was held in Dover, Del. on November 21, 2014 and 20 people participated. In December 2014, a downloadable *Transportation Improvement Districts: A Guide for Delaware Local Governments* was published (www.ipa.udel.edu/publications/TID-Guide-2015-Final-Web.pdf). The guide discusses the purpose, benefits, and planning framework in Delaware that requires intergovernmental coordination. It provides a step-by-step process for Delaware local governments to create TIDs and two best-practice examples for planning (City of Newark) and implementation (City of Dover) of TIDs in Delaware.



Development Trends

IPA continues to assist the OSPC to develop a better system for analyzing and tracking the development trends data using GIS. See Appendix A for a complete reporting of this year's data.

Development Trends Reporting (See Appendix A for details)

The OSPC has been collecting building-permit and development-approval data from all 60 local jurisdictions since the start of 2008. The purpose of this reporting is to inform state, county, and municipal efforts to promote development activity around existing infrastructure and in compliance with comprehensive plans and the *Strategies for State Policies and Spending*. These data are unique in that they are collected and reported in a consistent way based on information gathered directly from all statewide jurisdictions that issue building permits and development approvals. It should be noted that “Development Approvals” are seen as more speculative in nature compared to “Building Permit” data because pulling a permit is done when construction is expected to start.

Appendix A includes data and analysis on development activity in calendar years 2009 through 2014. Key findings include:

Development Approvals 2009-2014

- ◆ From 2009 through 2014, local governments in Delaware approved a total of 24,345 residential units for future development. New Castle County jurisdictions approved the most units—12,024, or 49 percent of the total. Development approvals were the highest in 2010 when 6,087 units were approved. This number has declined steadily since 2010, with only 2,627 units approved statewide in 2014.
- ◆ During this period, local governments approved 20,747 residential units in growth areas, defined as Investment Levels 1, 2, and 3 in the *Strategies for State Policies and Spending*. Overall, this represents 85 percent of all units approved in the state. A large majority of residential units approved in New Castle County (98%) and Kent County (95%) were in Levels 1 through 3. In Sussex County only 61 percent were located in Levels 1 through 3.
- ◆ From 2009 through 2014, local governments approved 16,351,487 square feet of non-residential development. The majority of this development was approved in New Castle County (80%). The remainder was split between Kent and Sussex Counties (14% and 6%, respectively). Non-residential development approvals peaked in 2011 when over 4 million square feet were approved, and have steadily declined since. In fact, 2014 represented the lowest number of square feet (1.6 million) since 2009.
- ◆ Most of the non-residential development approved by local governments in Delaware (95%) was located in Investment Levels 1, 2, or 3.

Building Permits 2009-2014

- ◆ During this period, local governments in Delaware issued building permits for 22,887 residential units. The majority of these permits were issued in Sussex County, where local governments issued permits for 11,792 residential units (51% of all units permitted in the state). All three counties experienced increased residential permitting activity in 2014 compared to the previous year, and in all counties the number of permits in 2014 was higher than any year since 2009. A total of 5,493 residential building permits were issued statewide in 2014, which is a 73 percent increase when compared to the 3,170 residential permits issued statewide in 2009.
- ◆ Statewide, 85 percent of residential units permitted by local governments were located in Investment Levels 1, 2, or 3 as defined by the *Strategies for State Policies and Spending*. New Castle County jurisdictions issued permits for 97 percent of their residential units in Levels 1 through 3, followed by Kent with 81 percent and Sussex with 79 percent.

- ◆ From 2009 through 2014, local governments issued permits for 16,123,520 square feet of non-residential development. As with residential development approvals, most of the activity (nearly 65%) was focused in New Castle County. Sussex County jurisdictions permitted 21 percent of the total, while Kent jurisdictions permitted the remaining 14 percent of non-residential development activity. In 2014 there were a total of 3,389,698 square feet of non-residential space permitted statewide. This represents a 49 percent increase since 2013.
- ◆ Statewide, 94 percent of all non-residential square-footage was permitted in Levels 1 through 3.

Key State Investments for FY2015 (See Appendix B for details)

- ◆ First State Trails and Pathways initiative has been funded with \$18.7 million from DNREC and \$10 million from DelDOT during FY12-FY16.
- ◆ Public school enrollment continues to rise, topping 134,000 students in 2014-2015. To meet this continued demand, the state expended over \$1.26 billion in operating costs for public education, which is roughly one-third of Delaware's operating budget.
- ◆ One new public school opened in fall 2015 (FY16) to meet the needs of increasing public-school enrollment and replace aging school infrastructure. One new elementary school is scheduled to begin construction, and another is in the planning stages. In FY15 the state spent over \$19.9 million on new construction and land acquisition for public schools.
- ◆ In FY15, the state has expended over \$372 million of state and federal monies on capital transportation projects to address the maintenance and expansion of our transportation system, which is about the same as FY14.
- ◆ For FY15, the state has provided approximately \$7,703,350 of state and federal funds to local governments for water and sewer infrastructure through the Water Pollution Control Fund.
- ◆ The state has expended \$112.3 million to operate the State Police, an increase over FY14, which provides support to all local police agencies and serves as the primary police service for unincorporated portions of Kent and Sussex Counties.
- ◆ The state is planning to construct new police facilities for Troop 3 in Camden and Troop 7 in Lewes to address overcrowding and maintenance needs at the existing facilities. The total cost of both facilities combined will be nearly \$30 million.
- ◆ In FY15, the Delaware Agricultural Lands Preservation Foundation preserved 13 farms comprising 1,066 acres at a cost of \$1,346 per acre.
- ◆ Delaware State Housing Authority (DSHA) has provided foreclosure prevention assistance, including loans, grants, and counseling, to 825 homeowners in FY15.



Delaware State Police Troop 3 under construction, near Magnolia

- ◆ In FY15, the DSHA provided more than \$124 million in mortgage assistance in the form of below-market rate mortgages, down-payment, and settlement assistance.

Comprehensive Planning (See Appendixes D and E for details)

The Governor certifies comprehensive plans once it is determined that they are consistent with Delaware Code and state land-use policies as articulated in the *Strategies for State Policies and Spending*. This year, the Governor certified one comprehensive plan, Newport. In addition, the OSPC has worked with 3 towns that have completed their 5-year review and have determined that they intend to use their certified plan until the 10-year update is due.

The OSPC has worked with local jurisdictions on a variety of comprehensive plan amendments and other activities as follows:

- ◆ **Bellefonte** – Reviewed an amendment to the Future Land Use Map to change one parcel from R1 to MX2.
- ◆ **Camden** – Reviewed two amendments: one to correct a mapping error and one to change the Future Land Use designation of a certain parcel. Also working with the town to update their plan.
- ◆ **Clayton** – Reviewed comprehensive plan amendment to make several changes as a result of their 5-year review. The town was also granted a Neighborhood Building Blocks grant to assist with the submittal of their Downtown Development District application.
- ◆ **Cheswold** – Reviewed amendment to reword the 5-year growth area and revise the Future Land Use map.
- ◆ **Dagsboro** – The town reviewed its comprehensive plan for changes in January 2015. The OSPC is currently reviewing the changes made to the plan to close out the review process. The town was also granted a Neighborhood Building Blocks grant to assist in the update of their comprehensive plan.
- ◆ **Delaware City** – Reviewed amendment to comprehensive plan to allow for the annexation of the Fort DuPont complex.
- ◆ **Delmar** – The town was granted a Neighborhood Building Blocks grant to assist in the update of their comprehensive plan.
- ◆ **Dewey Beach** – Reviewed an amendment to the Future Land Use Map to change 5 parcels from RB-1 to RR.
- ◆ **Dover** – Review of a comprehensive plan amendment to change the Future Land Use classification on a single parcel. The city was granted a Neighborhood Building Blocks grant to assist them in the Downtown Development District application. The city was designated as a Downtown Development District.
- ◆ **Farmington** – Working with the town on a complete update of their comprehensive plan.
- ◆ **Frederica** – Reviewed the updated draft comprehensive plan for certification issue and comments. The town has adopted the plan and is beginning the certification process.
- ◆ **Georgetown** – Reviewed an amendment to the Future Land Use Map to change the zoning on a certain parcel from UR-1 to ED. The town was granted a Neighborhood Building Blocks grant to assist in the update of their comprehensive plan.

- ◆ **Harrington** – The town was granted a Neighborhood Building Blocks grant to assist in the update of their comprehensive plan.
- ◆ **Henlopen Acres** – The comprehensive plan has been reviewed through PLUS. Certification issues were found and we are currently in the process of negotiating these items before the town adopts the plan and can submit for certification.
- ◆ **Leipsic** – Reviewed and commented on the existing comprehensive plan to determine changes needed during the proposed update (pre-update review).
- ◆ **Kenton** – The town is currently drafting their first comprehensive plan.
- ◆ **Lewes** – The city has been actively working to complete their comprehensive plan update. It is expected that the plan will be reviewed through PLUS in the next couple of months. In addition, the town was awarded a Neighborhood Building Blocks grant to assist in a master plan and the submittal of an application to be designated as a Downtown Development District.
- ◆ **Little Creek** – Reviewed and commented on the existing comprehensive plan to determine changes needed during the proposed update (pre-update review).
- ◆ **Middletown** – Reviewed and comments on a comprehensive plan amendment to change several parcels on its Future Land Use map to mixed use.
- ◆ **Milton** – The town reviewed its comprehensive plan in May 2015 and determined it would need updating. The update is underway.
- ◆ **Milford** – Reviewed three comprehensive plan amendments to their comprehensive plan to bring it and the southeast (SE) master plan in to compliance. A comprehensive plan update is also underway.
- ◆ **New Castle County** – Reviewed several text amendments to the Unified Development Code (UDC) over the past year. The county is in the midst of a consultant study to update its UDC.
- ◆ **New Castle** – The city was granted a Neighborhood Building Blocks grant to assist in the implementation of the economic development portion of their comprehensive plan.
- ◆ **Newark** – Working with the city to update its comprehensive plan.
- ◆ **Slaughters Beach** – The town reviewed its plan in 2014 and made changes accordingly. The OSPC coordinated a meeting between the town and Sussex County to resolve a municipal boundary issue.
- ◆ **Seaford** – The city was awarded a Neighborhood Building Blocks grant to assist in the submittal of a Downtown Development District application. The city was designated as a Downtown Development District.
- ◆ **Smyrna** – The town was awarded a Neighborhood Building Blocks grant to assist with submittal of a Downtown Development District application.
- ◆ **Wilmington** – The city was awarded a Neighborhood Building Blocks grant to assist in the completion of a Downtown Development District application. The city was designated as a Downtown Development District.

Municipal Boundaries

The OSPC and the Kent County Department of Planning Services continue to work with local governments in Kent County to record municipal boundary maps as specified in some local charters. In the past year the OSPC has continued to develop our working relationship with Kent County to enhance data sharing and tracking of annexations. Outreach to Kent towns is continuing. A meeting was held with Sussex County officials to discuss the recordation of municipal boundaries, and the OSPC is currently reviewing county and town data to help develop a path forward in Sussex.

School Site Selection

The OSPC works closely with the Delaware Department of Education (DDOE), the Delaware Office of Management and Budget (OMB), and the local school districts to identify viable sites for new school construction. The process involves GIS analysis and a review of the *Strategies for State Policies and Spending*, utility availability, local government comprehensive plans, school district needs, transportation, and other factors. All potential school sites are reviewed through the PLUS process, and the Secretary of Education and the directors of OMB and the OSPC must approve the site. Currently the OSPC, DDOE and OMB are working with Sussex Technical and Cape Henlopen school districts on the selection of new school sites.

Preliminary Land Use Services (PLUS) Reviews

The Preliminary Land Use Service (PLUS) process is a monthly review process that brings state and local land-use officials together with developers to review development proposals in the earliest stages of the development to note possible issues and make suggestions before a developer has made substantial investment in a project. The process is also used to review comprehensive plans for updates and amendments. Since last year's report, the state has reviewed 75 PLUS applications, up from the 57 reviews in 2014. These applications included comprehensive plan reviews, updates and amendments, rezonings, and subdivision plans.

Delaware Population Consortium

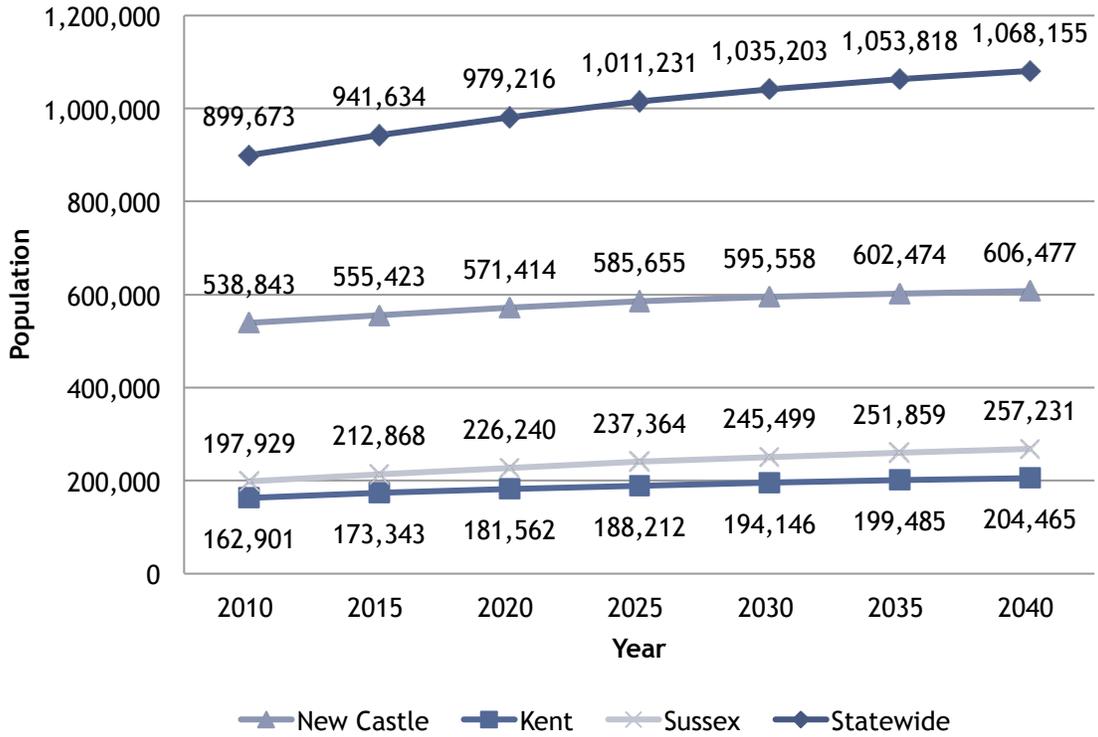
The Delaware Population Consortium (DPC) was formed in 1975, with the goal of "providing a continuing forum for debate and discussion of matters relating to state and local population growth." The DPC is an informal organization with representation from state agencies, local jurisdictions, counties, and metropolitan planning organizations.

The Delaware Population Consortium, in conjunction with the State Data Center and the US Census Bureau, offered a series of training sessions on Census topics in 2014 and 2015. Topics included Census data resources, geospatial topics, local employment dynamics and an economic training session.

Today the DPC is at a crossroads. Although the projections produced by the DPC are indispensable to so many planning and forecasting processes throughout the state, it has never been formalized or adopted by the state as the authority.

In addition to not being codified by the state, the DPC has long relied upon the services of a single employee of the University of Delaware's Center for Applied Demography and Survey Research (CADSR). This employee has, for decades, provided the technical expertise and time to preparing projections each year. However, this employee has announced plans for retirement. With this retirement will go the vast knowledge and skills necessary to continue the reproduction of population and economic projections for the State of Delaware.

Furthermore, a new business model is in place at the University of Delaware (UD), which requires all UD Departments including CADSR to charge for services rendered outside of the Department. For 2014 and this year, the DPC garnered funding through the metropolitan planning organizations (WILMAPCO, and the Dover/Kent County MPO) to fund the population projections from CADSR. This is a transition period as the employee moves into retirement and he can pass along his knowledge and methodology to the other CADSR staff. A long-term funding strategy is being developed.



Delaware County and State Population Projections (2010-2040)
 Source: Delaware Population Consortium, October 2014

Land-Use Agenda Work Plan for 2014-2015

In order to continue to implement Governor Markell's land use goals for Delaware, the following work plan is proposed.

Downtown Development Districts

In the coming year the OSPC will work with the CCSPI to monitor and administer the designated Downtown Development Districts (DDD) as specified in the legislation. This will include processing requests for changes to the DDD boundaries (there have already been three requests) and monitoring implementation of local incentives as proposed in each District Plan. Should the Governor decide to open another round of district designations, the OSPC will administer the application process and review with the CCSPI.

The DSHA will continue to administer the District Grant program to provide reimbursements to both large and small projects within each designated District. A new round of large project "reservations" is expected in fall of 2015, and this process will be repeated annually each September. The DSHA continues to refine the grant guidelines based on feedback from qualified real property investors and local governments.

Complete Communities

The University of Delaware Institute for Public Administration (IPA) will formally launch, actively market, and continue to develop content within Delaware Complete Communities Planning Toolbox. New Toolbox topics will include Flood-Ready Communities, Low-Stress Bicycle Connections, a new Bikeability Assessment Tool, and a video tutorial to raise awareness and promote use of IPA's Healthy Communities: The Walkability Assessment Tool. IPA will also begin working on a multi-phase program on mobility in Delaware. An initial phase will focus on identifying and mapping community facilities that drive demand for specialized, public transportation in Delaware. IPA will also assess current initiatives to coordinate specialized transportation services in Delaware.

Master Planning

The OSPC will continue to promote the development and implementation of the master plan concept (see Highlights Section for a description of "Master Planning"), including the following current projects.

- ◆ **Kent County Transportation Master Plan** – Kent County's comprehensive plan identifies a number of areas where Transportation Improvement Districts (TIDs) are desirable to assist in programming and funding needed for transportation improvements. The OSPC is available to assist the county and DelDOT in the completion of these studies, which are expected to begin this fiscal year.
- ◆ **Dover US Route 13/Bay Road Corridor Transportation Improvement District (TID)** – As part of state's efforts to secure required improvements to transportation facilities and to coordinate land use and transportation planning, the City of Dover and Dover/Kent County Metropolitan Organization (MPO) are working with DelDOT to establish the Dover US Route 13/Bay Road Corridor TID. This TID is located in the heart of Dover along the Route 13/Bay Road Corridor. All land developments that require a subdivision or land development plan and all state-maintained capital transportation facilities (roads, bridges, sidewalks, bus

stops, etc.) that are located within TID boundary and are not exempt will participate in the improvement of transportation facilities. Developers are required to meet defined standards to mitigate any negative impact of a proposed land development on transportation facilities and are subject to impact fees that will be used as contribution towards preparation and update of the Land Use and Transportation Plan. DelDOT will continue to inventory the exiting transportation network, forecast traffic, determine locations that would need improvements, and identify improvements needed within the TID to comply with defined standards.

- ◆ **Milford Master Plan** – The City of Milford continues to implement their Southeast Neighborhood Master Plan. The city continues to work on the public water system in this area. The first major project, the \$250 million Bayhealth medical campus, is in the planning stages. It is due to be complete and open to the public by 2019.
- ◆ **Town of Smyrna Route 13 Corridor Plan** – The town continues to work on Phase 2 of the utility project, which will connect customers north of Duck Creek to water and sewer. The town is also actively engaged in economic development efforts that have led to the recruitment of national retailers, hotels, and local restaurants to the corridor.
- ◆ **Fort DuPont Master Plan** – As discussed in the “Highlights for 2014-2015 section, implementation of the finalized plan will be spearheaded by the Fort DuPont Redevelopment Corporation, with the newly appointed board of trustees and advisory council along with the newly hired executive director. The OSPC is represented on the redevelopment corporation board of trustees.
- ◆ **New Castle County Plans** – The OSPC will be involved with the Master Plans described on page 13: Glasgow Avenue Main Street Study; North Claymont Area Study; Route 141 20 Year Transportation and Land Use Study; and, the Route 9 Corridor Study.

Air Force Community Partnership Program

The Delaware Air Force Base (DAFB) has initiated a Community Partnership Program to evaluate public-public and public-private partnerships to leverage military installation resources with local community resources and capabilities to obtain value and benefit in support of the Air Force mission. Planning efforts commenced in summer 2015 and involves stakeholders who will develop partnership concepts to be evaluated for implementation by Leadership committee. DelDOT is an active participant in this effort.

Delaware Population Consortium

In order to ensure that the Delaware Population Consortium continues to provide the projections that are so critical (and in some cases, required by Delaware Code) to our government and private sector entities, it is recommended that the following work items be explored again this year.

- ◆ Develop executive order or legislation to formalize the role of the Delaware Population Consortium as the authority, which produces the official population projections for Delaware.
- ◆ Develop executive order or legislation to require that all state agencies use the DPC projections. This is currently the practice, but it is not required.
- ◆ Develop a plan to ensure the continuance of staff to produce the population projections each year.

- ◆ Develop the funding plan and mechanism to ensure future projections.

Geospatial Coordination

The Delaware Geographic Data Committee (DGDC) will continue working on the following initiatives.

- ◆ **FirstMap** – OSPC will continue to work with the Department of Technology and Information (DTI) to ensure the enterprise geospatial system is maintained and enhanced. A Technical Advisory Committee (TAC) is being formed which will provide guidance for future enhancements and applications and will provide guidance to the DTI staff for the long term vision of the system and provide insight into industry standards and new technologies that should be considered.
- ◆ **Geospatial Governance** – With the launch of FirstMap, it has become increasingly evident that Delaware is in need of a geospatial coordinator to provide the vision and full coordination of GIS data collection and guidance for agencies. Successful coordination will require full time attention to the geospatial needs of all state agencies. A strategic plan and business plan were developed in 2010 and updated in 2012 detailing the needs of the state agencies and a proposed path forward. These documents should be reviewed again and implemented as appropriate.
- ◆ **Long-term Funding Plan** – A dedicated funding stream for data of statewide importance will be sought to improve government efficiency. Without such dedicated funding for data, the state spends more time negotiating contracts and coordinating funding through a variety of agencies.
- ◆ **Federal Coordination** – The OSPC and the DGDC will continue to work with our federal partners to seek opportunities to leverage our local data at a national level to improve the quality of their datasets. We will also continue to seek partnerships to reduce the funding obligation at the state level where available.

School Site Planning

The OSPC, DDOE, the OMB, will continue to work on assisting the school districts with identification and approval of future school sites. Current projects include the review of school sites for the Sussex Technical and Cape Henlopen school districts.

Delaware Coalition for Healthy Eating and Active Living (DE HEAL)

The OSPC and other state agencies will continue to work with DE HEAL, which supports and encourages programs, environments, and resources that promote healthy eating and active living. In particular, state agencies actively participate in DE HEAL with the Environment and Policy subcommittee, which focuses on how the physical environment affects our health.

The Environment and Policy Setting subcommittee is scheduled to undertake the following projects this coming year:

- ◆ Develop new PLUS checklists, one specific to commercial developments, one specific to new school construction, and one specific to comprehensive plans.
- ◆ Refine the existing Recognition for Community Health Program by expanding participation to a greater number of municipalities as well as fully accounting for the efforts of smaller municipalities.

State Land Inventory

The OSPC will continue to work on the inventory of state-owned property. This work will also identify the group that will be responsible for the updating process. The inventory also contains leases and state-owned buildings. Work is also continuing with the agencies to update the data and coordinate the uses of the data.

Contract with University of Delaware's Institute for Public Administration

The OSPC will continue its strategic partnership with the University of Delaware IPA this fiscal year. IPA will assist with GIS analysis of development trends data, completion of the PLUS research project Phase II, and begin Phase III of that project. Phase III will involve developing a business case to support the transition of the PLUS application and review to an electronic process that can be fully integrated with GIS and managed by a common database. IPA will also provide data analysis and support to assist the OSPC in the 5-year update of the *State Strategies for Policies and Spending*.

Stockley Center Collaborative

This initiative, as described in the Highlights section above, will focus on overseeing the planning and implementation of the task force's report recommendations. Planning for the implementation of a model mixed-use development is of particular interest.

Regularly Occurring Activities as Required in Delaware Code

The OSPC staff will continue to perform their regular duties as they relate to the PLUS process, development data collection and analysis, municipal annexation reviews, comprehensive plan reviews, local government assistance, demographic data collection and analysis, and other related activities.

Appendices

The following sections represent the detailed information supporting the information and analysis presented in this report.

Appendix A: Development-trends Data and Analysis

Appendix B: State Financial Investments Supporting Recent Trends

Appendix C: Demographic Data

Appendix D: Comprehensive-planning Progress

Appendix E: Highlights from Local Jurisdiction Annual Reports

Appendix A: Development-Trends Data and Analysis

Introduction

To assist in the tracking of development trends in the state, the Office of State Planning Coordination (OSPC) has been collecting building permit and development approval data from all 60 local jurisdictions since the start of 2008.

Each year, OSPC has been collating and structuring these data into a consistent set of data in Geographic Information Systems (GIS)-compatible formats. The data include the date of the development application or building permit approval; the number of units proposed (for residential applications) or square-footage (for non-residential applications); the county or jurisdiction; acreage; and physical location, among other attributes.

Two types of development activity information are considered in this analysis: development application approvals and building permits. Not all development applications result in eventual development, while in general, a building permit is a strong indicator that construction will take place.

There is a time gap between the development application process and the issuance of a building permit. Building permits issued in one year are therefore not necessarily based on applications from the same year. These measures do, however, provide an indicator of development trends.

Policies at the state level seek to help guide development appropriately. The 2010 *Strategies for State Policies and Spending* (the “*State Strategies*”) is a document that seeks to achieve this by specifying where in the state development is most appropriate and desirable. The *State Strategies* defines four “investment levels”, or zones, which specify the intensity of development encouraged in each by the various state agencies. Investment Levels 1 and 2 constitute areas where growth is most encouraged, Level 3 is considered a secondary growth zone, and Level 4 defines the zone where intensive growth is not encouraged by the state. By comparing where applications for development and building permits have been approved to the *State Strategies* Investment Levels, it is possible to assess the effectiveness of the state’s growth policies.

As market forces and public policies interact to guide growth in the state, an analysis of these development trends based on actual approved development applications and building permits provide a picture of the state’s growth trajectory on an annual basis.

Development Trends Summary

Development Applications

Development applications represent approved preliminary development applications for residential and non-residential projects. A project proposed for approval at this early stage includes site plans, which indicate the scope and scale of a likely project. This provides an indication of potential future development.

Residential Trends

In the six years from 2009 through 2014, a total of 24,246 residential units were approved for development by local governments in Delaware. This represents a lower total than in the six years (2008-2013) reported in the previous report, during which time over 32,000 units were approved. This mirrors an overall statewide decline since 2010. Table A.1 presents the distribution of residential development application activity by county.

Table A.1 Residential Units Approved by Development Application, by County

County	2009	2010	2011	2012	2013	2014	Total
New Castle	355	3,989	2,433	3,207	905	1,135	12,024
Kent	1,450	563	196	481	728	650	4,068
Sussex	2,538	1,535	1,900	355	1,083	842	8,253
Total	4,343	6,087	4,529	4,043	2,716	2,627	24,345

Table A.2 shows the number of units for each year by local jurisdiction.

Table A.2 Residential Units Approved by Development Application, by Local Jurisdiction

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
New Castle County*	225	3,310	2,387	3,093	488	780	10,283
Bellefonte	-	-	-	-	-	-	-
Delaware City	-	-	-	-	-	-	-
Elsmere	-	-	-	-	-	-	-
Middletown	14	472	-	-	-	-	486
New Castle	-	-	-	-	-	120	120
Newark	26	144	32	39	412	117	770
Newport	-	-	-	-	-	-	-
Odessa	-	-	-	-	-	-	-
Smyrna	-	-	-	-	-	-	-
Townsend	-	-	-	-	-	-	-
Wilmington	90	63	14	75	5	118	365
New Castle Total	355	3,989	2,433	3,207	905	1,135	12,024
Kent County*	-	444	-	36	646	208	1,334
Bowers Beach	-	-	-	-	-	-	-
Camden	-	-	-	-	-	-	-
Cheswold	-	-	-	-	-	-	-
Clayton	1	-	-	200	-	-	201
Dover	378	119	188	245	82	41	1,053
Farmington	-	-	-	-	-	-	-
Felton	-	-	-	-	-	-	-
Frederica	-	-	-	-	-	-	-
Harrington	-	-	6	-	-	-	6
Hartly	-	-	-	-	-	-	-
Houston	-	-	-	-	-	-	-
Kenton	-	-	-	-	-	-	-
Leipsic	-	-	-	-	-	-	-
Little Creek	-	-	-	-	-	-	-
Magnolia	-	-	-	-	-	-	-
Milford	1,067	-	2	-	-	401	1,470
Smyrna	4	-	-	-	-	-	4
Viola	-	-	-	-	-	-	-
Woodside	-	-	-	-	-	-	-
Wyoming	-	-	-	-	-	-	-
Kent Total	1,450	563	196	481	728	650	4,068
Sussex County*	1,169	588	1,541	355	352	714	4,719

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
Bethany Beach	-	-	-	-	-	-	-
Bethel	-	-	-	-	-	-	-
Blades	-	-	-	-	-	-	-
Bridgeville	-	-	-	-	-	-	-
Dagsboro	-	741	17	-	-	-	758
Delmar	-	-	-	-	-	-	-
Dewey Beach	-	-	-	-	-	-	-
Ellendale	405	-	-	-	-	-	405
Farmington	-	-	-	-	-	-	-
Fenwick Island	-	-	-	-	-	-	-
Frankford	-	-	-	-	-	-	-
Georgetown	28	-	-	-	-	-	28
Greenwood	-	-	-	-	-	-	-
Henlopen Acres	-	-	-	-	-	-	-
Laurel	-	-	-	-	-	-	-
Lewes	-	102	17	-	-	-	119
Milford	392	-	306	-	-	-	698
Millsboro	48	-	-	-	55	-	103
Millville	-	-	-	-	-	128	128
Milton	337	-	-	-	-	-	337
Ocean View	-	-	-	-	300	-	300
Rehoboth Beach	-	-	15	-	-	-	15
Seaford	159	104	4	-	72	-	339
Selbyville	-	-	-	-	304	-	304
Slaughter Beach	-	-	-	-	-	-	-
South Bethany	-	-	-	-	-	-	-
Sussex Total	2,538	1,535	1,900	355	1,083	842	8,253
State Total	4,343	6,087	4,529	4,043	2,716	2,627	24,345

**Represents development applications in unincorporated areas of the county*

The following map (Figure A.1) shows the location of each residential development application in Delaware from 2008 to 2014. The size of the dots relates to the number of proposed housing units associated with that application. This map indicates that areas in southern New Castle County, as well as areas surrounding many smaller towns in Kent and Sussex Counties are seeing considerable development pressure. Note that development applications do not necessarily lead to completed development projects, but do indicate likely areas of future investment.

All maps in this development trend report include data for all available years in the study period, not just the most recent six years.

Figure A.1 Residential Development Applications 2008-2014

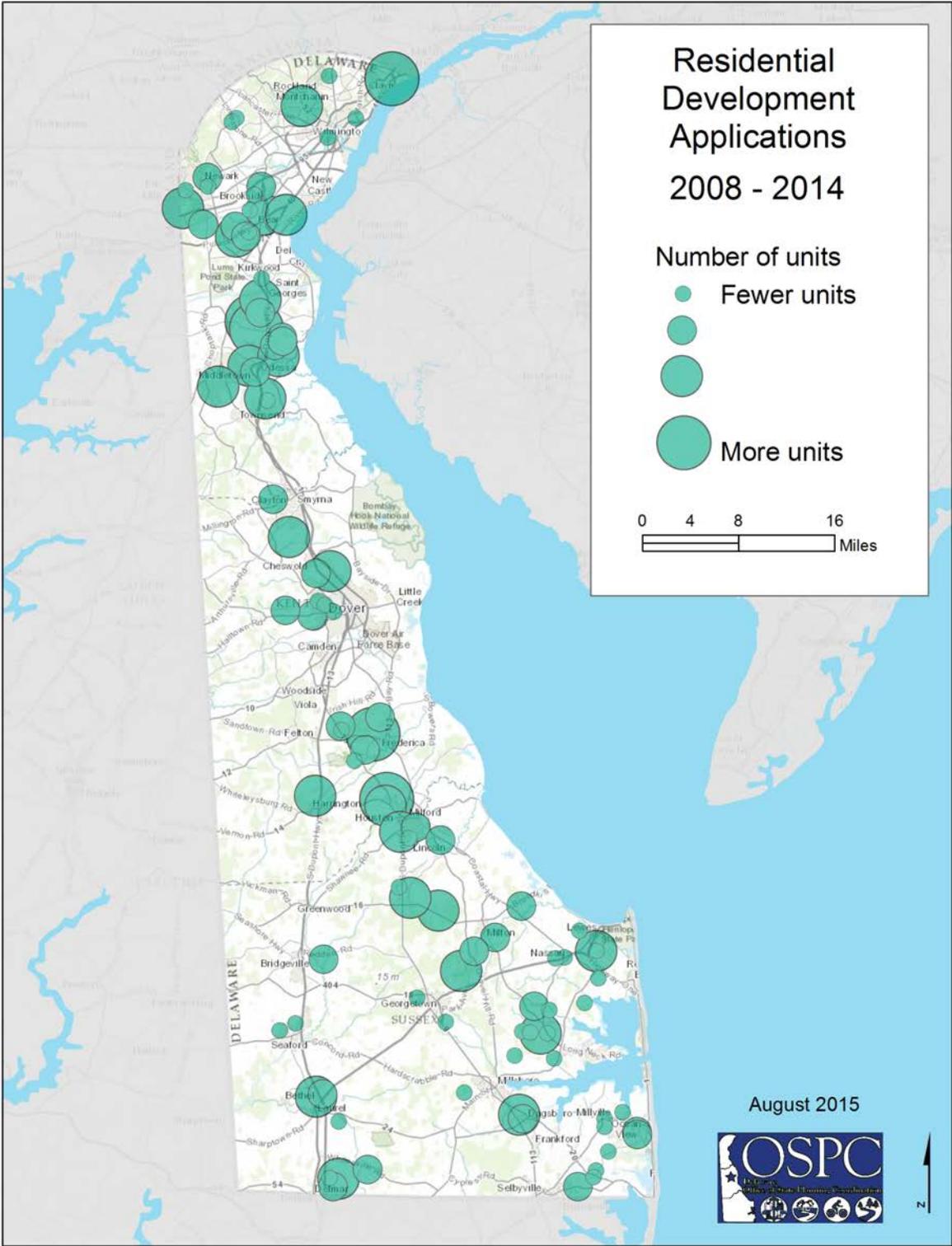
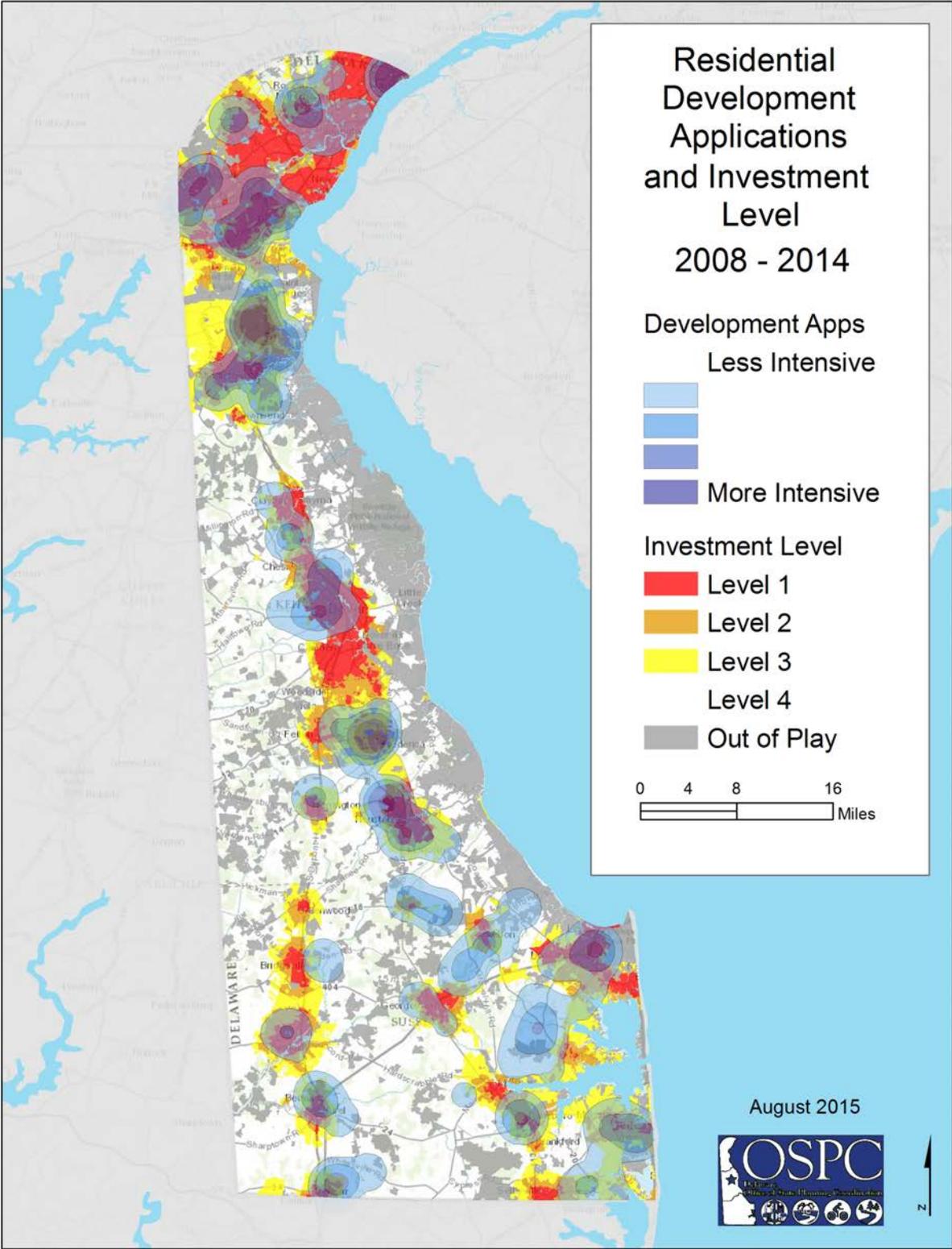


Figure A.2 Residential Development Applications and Investment Level 2008-2014



The map in Figure A.2 shows the intensity of residential unit approvals on top of state investment level as defined in the 2010 *Strategies for State Policies and Spending* (Levels 1, 2 and 3 are designated growth areas, with 1 and 2 being where the state encourages the most development, while growth in Level 4 is discouraged). This “heat map” indicates hot-spots of activity, with darker blue indicating more intensity. The map suggests that, in general, residential development has been occurring in areas where the state has encouraged development, with the exception of some activity in Sussex County west of the Inland Bays.

Table A.3 summarizes residential development applications based on investment level.

Table A.3 Residential Units in Development Applications by County and Investment Level, 2009-2014

	2009	2010	2011	2012	2013	2014	2009-2014
New Castle							
Level 1 & 2	330	3,810	2,103	2,994	889	505	10,631
Level 3	-	162	326	200	9	502	1,199
Level 4	25	17	4	13	7	128	194
New Castle Total	355	3,989	2,433	3,207	905	1,135	12,024
Kent							
Level 1 & 2	1,450	118	196	480	728	442	3,414
Level 3	-	445	-	-	-	-	445
Level 4	-	-	-	1	-	208	209
Kent Total	1,450	563	196	481	728	650	4,068
Sussex							
Level 1 & 2	1,066	1,058	359	268	872	398	4,021
Level 3	615	31	93	63	50	185	1,037
Level 4	857	446	1,448	24	161	259	3,195
Sussex Total	2,538	1,535	1,900	355	1,083	842	8,253
Delaware							
Level 1 & 2	2,846	4,986	2,658	3,742	2,489	1,345	18,066
Level 3	615	638	419	263	59	687	2,681
Level 4	882	463	1,452	38	168	595	3,598
State Total	4,343	6,087	4,529	4,043	2,716	2,627	24,345

The graphs in Figure A.3 present the occurrence of residential development applications by investment level, for each county and the state as a whole, during the preceding 6-year period (2009-2014). Figure A.4 show the percentage of residential development application, based on residential units, by investment level, for the same period. New Castle County has the highest percentage (88%) of applications occurring in Level 1 and 2 areas, while Sussex County has the lowest, with only 49 percent occurring in those higher growth zones.

Figure A.3 Residential Units Based on Development Applications, New Castle County, Kent County, Sussex County, and State of Delaware

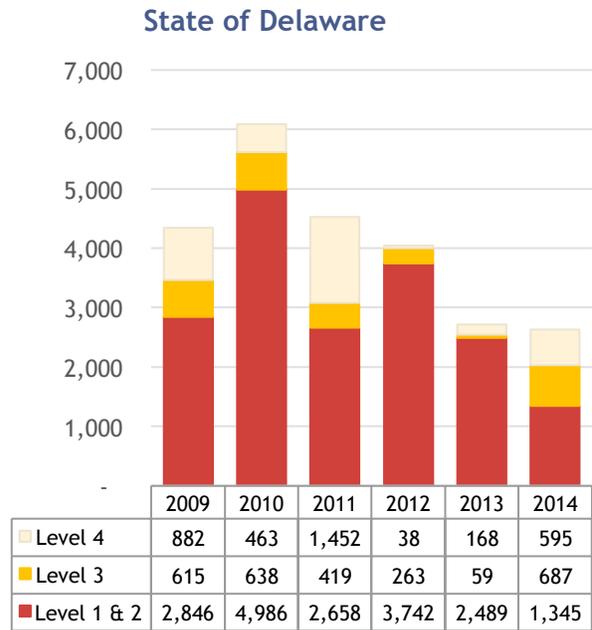
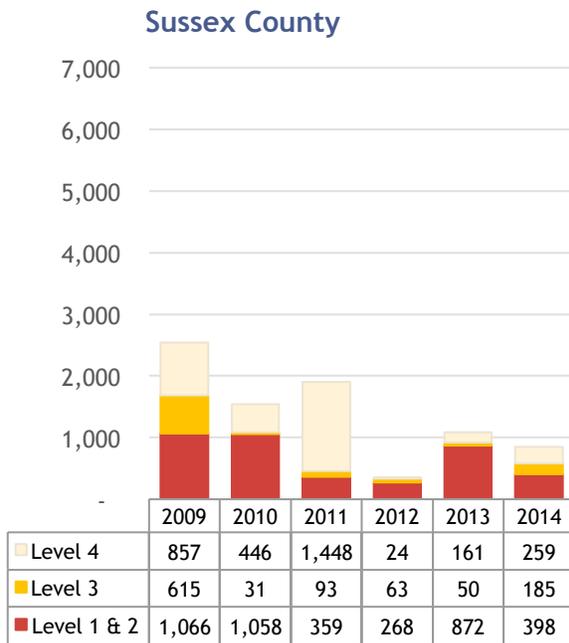
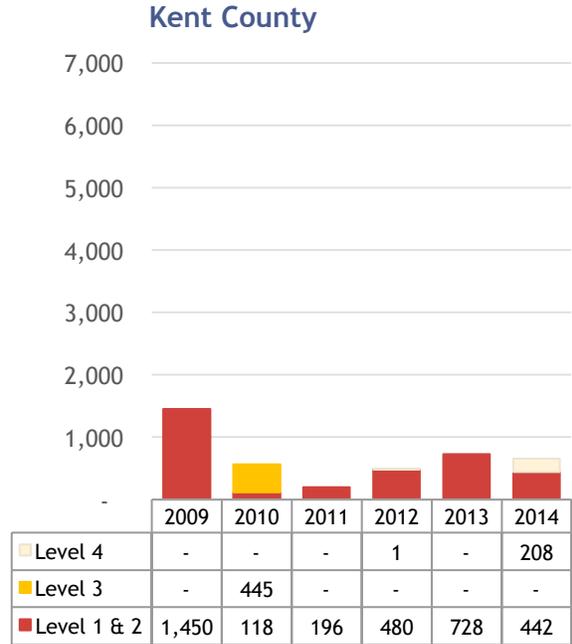
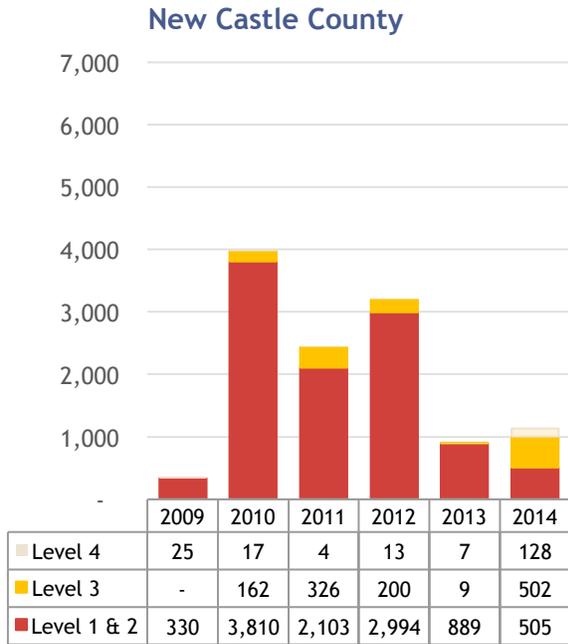
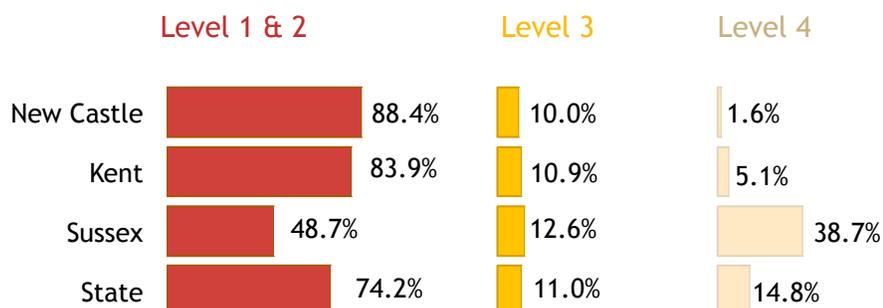


Figure A.4 Residential Units Based on Development Applications, percentage by Investment Level, 2009-2014, New Castle County, Kent County, Sussex County, and State of Delaware



Non-residential Trends

Non-residential development includes commercial, office, industrial, and institutional uses. The unit of measure for this analysis is the total square-footage of approved and permitted non-residential development. While the amount of square-footage approved in Kent and Sussex County saw a slight increase in the latest year (2014), New Castle County experienced a substantial drop. Table A.4 summarizes the square-footage approved in development applications from 2009 through 2014, by county. Table A.5 summarizes this activity at the local jurisdiction level.

Table A.4 Non-residential Square-footage Approved by Development Application, by County

County	2009	2010	2011	2012	2013	2014	Total
New Castle	1,447,092	1,207,256	3,928,832	3,115,308	2,090,496	1,254,744	13,043,728
Kent	307,654	783,004	269,520	344,307	292,839	344,333	2,341,657
Sussex	617,060	37,119	62,858	100,000	60,580	88,485	966,102
Total	2,371,806	2,027,379	4,261,210	3,559,615	2,443,915	1,687,562	16,351,487

Table A.5 Non-residential Square-footage Approved by Development Application, by Local Jurisdiction

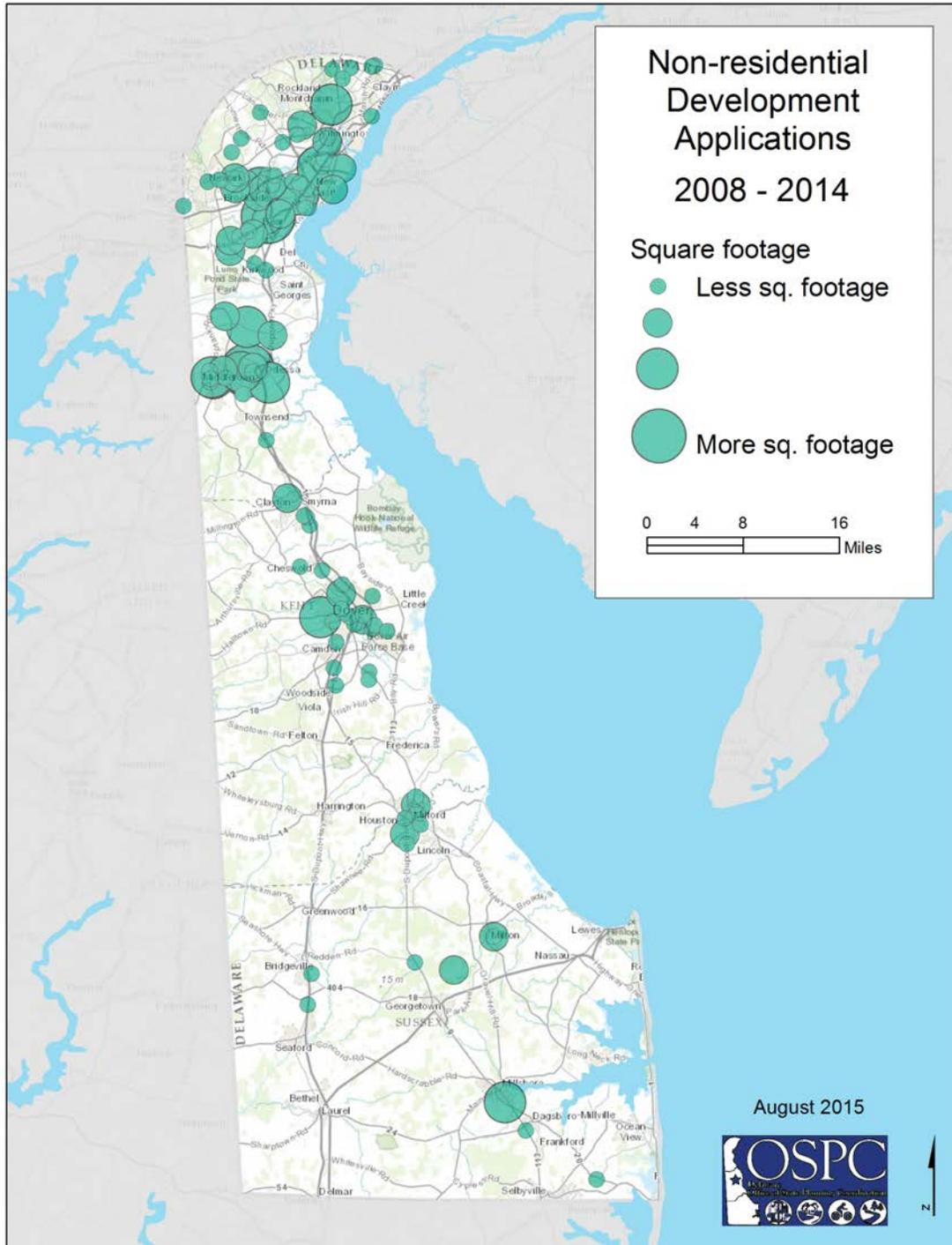
Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
New Castle County*	497,482	1,038,406	2,349,202	2,785,874	1,911,279	1,168,594	9,750,837
Bellefonte	-	-	-	-	-	-	-
Delaware City	-	-	-	-	-	-	-
Elsmere	-	-	-	-	-	-	-
Middletown	931,713	-	1,168,631	2,950	148,416	56,234	2,307,944
New Castle	-	-	191,466	191,466	-	-	382,932
Newark	14,580	168,850	8,671	107,260	-	12,379	311,740
Newport	-	-	-	-	-	-	-
Odessa	-	-	-	-	-	-	-
Smyrna	-	-	-	-	-	-	-
Townsend	-	-	-	-	-	9,217	9,217
Wilmington	3,317	-	210,862	27,758	30,801	8,320	281,058
New Castle Total	1,447,092	1,207,256	3,928,832	3,115,308	2,090,496	1,254,744	13,043,728
Kent County*	127,388	-	89,628	100,316	171,879	85,461	574,672

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
Bowers Beach	-	-	-	-	-	-	-
Camden	-	63,339	-	-	-	-	63,339
Cheswold	-	-	-	-	-	-	-
Clayton	-	-	-	-	-	-	-
Dover	122,057	702,415	120,592	200,363	120,960	203,276	1,469,663
Farmington	-	-	-	-	-	-	-
Felton	-	-	-	-	-	-	-
Frederica	-	-	-	-	-	-	-
Harrington	-	10,250	25,706	-	-	-	35,956
Hartly	-	-	-	-	-	-	-
Houston	-	-	-	-	-	-	-
Kenton	-	-	-	-	-	-	-
Leipsic	-	-	-	-	-	-	-
Little Creek	-	-	-	-	-	-	-
Magnolia	-	-	-	-	-	-	-
Milford	32,389	7,000	24,986	38,628	-	2,436	105,439
Smyrna	25,820	-	8,608	5,000	-	53,160	92,588
Viola	-	-	-	-	-	-	-
Woodside	-	-	-	-	-	-	-
Wyoming	-	-	-	-	-	-	-
Kent Total	307,654	783,004	269,520	344,307	292,839	344,333	2,341,657
Sussex County*	376,476	-	-	-	38,280	-	414,756
Bethany Beach	-	-	-	-	-	-	-
Bethel	-	-	-	-	-	-	-
Blades	-	-	-	-	-	-	-
Bridgeville	96,500	-	18,800	-	-	-	115,300
Dagsboro	-	-	33,933	-	-	-	33,933
Delmar	-	15,400	-	-	-	-	15,400
Dewey Beach	-	-	-	-	-	-	-
Ellendale	-	-	-	-	-	-	-
Farmington	-	-	-	-	-	-	-
Fenwick Island	-	-	-	-	-	-	-
Frankford	-	-	-	-	-	-	-
Georgetown	33,340	5,719	-	-	-	38,727	77,786
Greenwood	-	-	-	-	-	-	-
Henlopen Acres	-	-	-	-	-	-	-
Laurel	-	-	5,125	-	-	1,560	6,685
Lewes	-	-	-	-	-	-	-
Milford	79,544	-	-	-	-	-	79,544
Millsboro	-	-	-	-	16,000	-	16,000
Millville	-	-	-	-	-	-	-
Milton	-	-	-	100,000	-	-	100,000
Ocean View	-	-	-	-	1,500	-	1,500
Rehoboth Beach	-	-	-	-	-	-	-
Seaford	31,200	16,000	5,000	-	4,800	48,198	105,198
Selbyville	-	-	-	-	-	-	-
Slaughter Beach	-	-	-	-	-	-	-
South Bethany	-	-	-	-	-	-	-
Sussex Total	617,060	37,119	62,858	100,000	60,580	88,485	966,102
State Total	2,371,806	2,027,379	4,261,210	3,559,615	2,443,915	1,687,562	16,351,487

*Represents building permits in unincorporated areas of the county

Figure A.5 presents the map of non-residential development applications across the time period, with the size of the dot varying with the amount of proposed square-footage. Even though the square-footage in New Castle County has seen a decline significantly in the latest year, over the period, the majority of approved square-footage has occurred there.

Figure A.5 Non-residential Development Applications 2008-2014



The map in Figure A.6 represents development intensity overlaid on investment level zones as defined in the 2010 *Strategies for State Policies and Spending*.

Figure A.6 Non-residential Development Applications and Investment Level 2008-2014

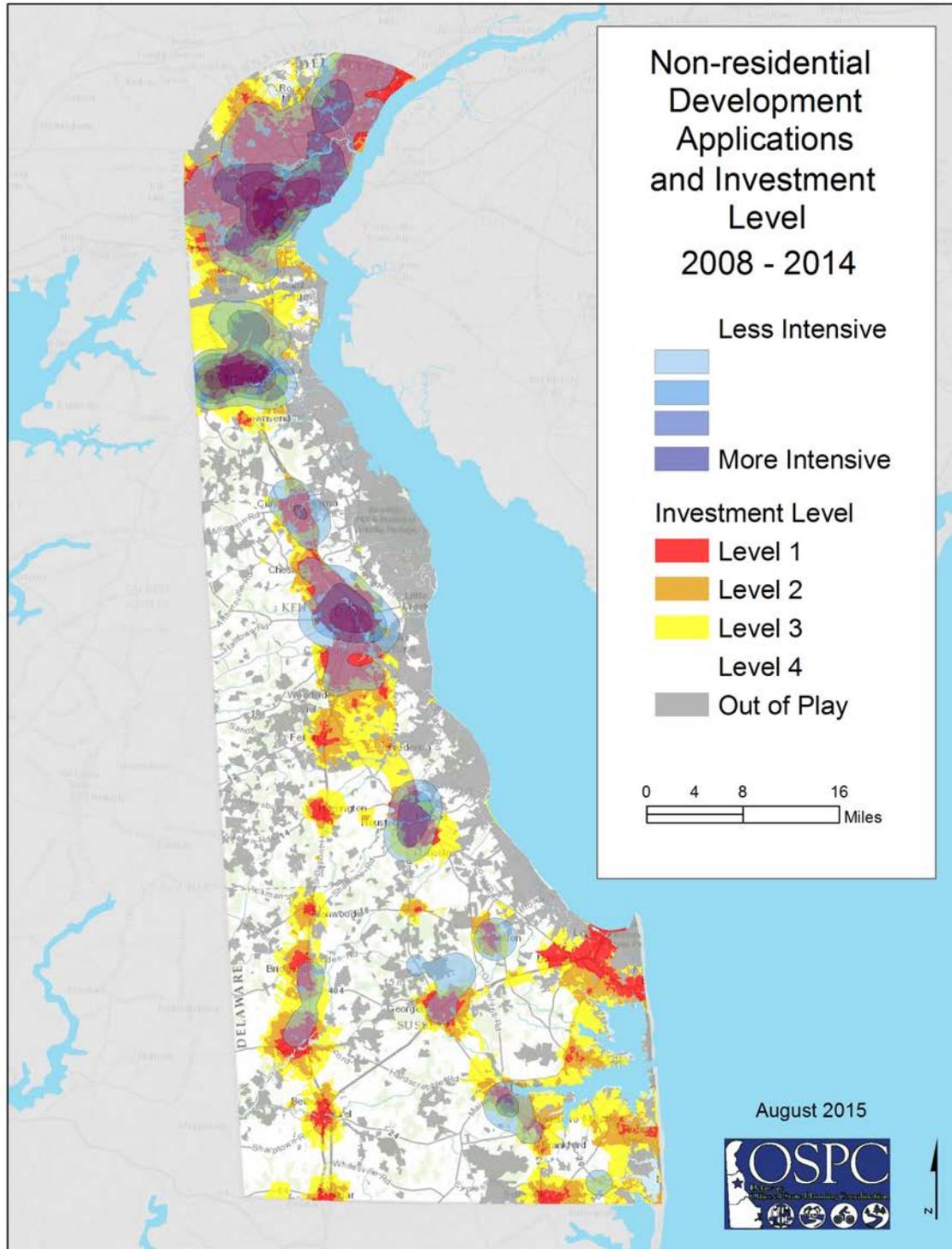


Table A.6 shows the amount of square-footage in non-residential development applications, by county and investment level, for each year in the study period.

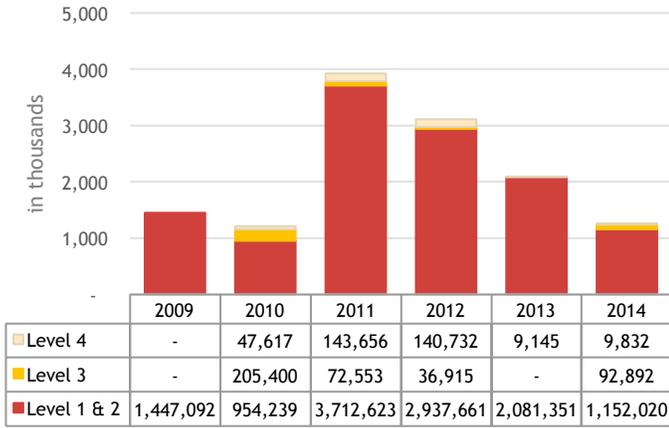
Table A.6 Non-Residential Square-footage in Development Applications by County and Investment Level, 2009-2014

	2009	2010	2011	2012	2013	2014	2009-2014
New Castle							
Level 1 & 2	1,447,092	954,239	3,712,623	2,937,661	2,081,351	1,152,020	12,284,986
Level 3	-	205,400	72,553	36,915	-	92,892	407,760
Level 4	-	47,617	143,656	140,732	9,145	9,832	350,982
New Castle Total	1,447,092	1,207,256	3,928,832	3,115,308	2,090,496	1,254,744	13,043,728
Kent							
Level 1 & 2	307,654	783,004	245,204	320,792	243,190	332,213	2,232,057
Level 3	-	-	18,904	-	6,361	-	25,265
Level 4	-	-	5,412	23,515	43,288	12,120	84,335
Kent Total	307,654	783,004	269,520	344,307	292,839	344,333	2,341,657
Sussex							
Level 1 & 2	283,618	37,119	62,858	100,000	34,300	86,925	604,820
Level 3	2,104	-	-	-	24,480	-	26,584
Level 4	331,338	-	-	-	1,800	1,560	334,698
Sussex Total	617,060	37,119	62,858	100,000	60,580	88,485	966,102
Delaware							
Level 1 & 2	2,038,364	1,774,362	4,020,685	3,358,453	2,358,841	1,571,158	15,121,863
Level 3	2,104	205,400	91,457	36,915	30,841	92,892	459,609
Level 4	331,338	47,617	149,068	164,247	54,233	23,512	770,015
State Total	2,371,806	2,027,379	4,261,210	3,559,615	2,443,915	1,687,562	16,351,487

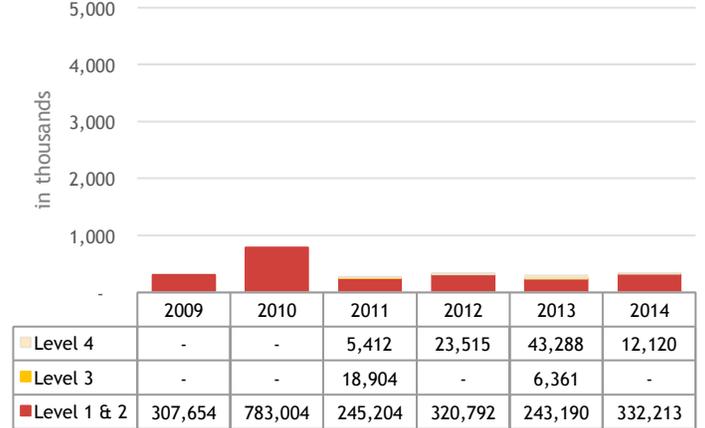
Figure A.7 shows the amount of square-footage in development applications for the years 2009-2014 within each investment level, in each Delaware county, and for the state. Figure A.8 presents the percentage of non-residential square-footage approved in each county and the state by investment level.

Figure A.7 Non-residential Square-footage Based on Development Applications, New Castle County, Kent County, Sussex County, and State of Delaware

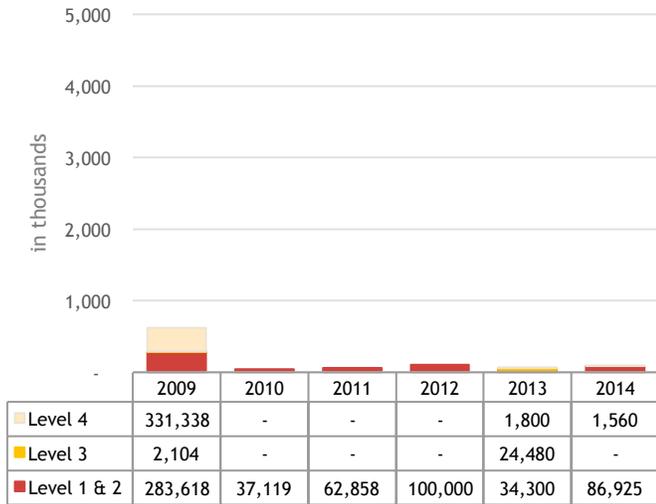
New Castle County



Kent County



Sussex County



State of Delaware

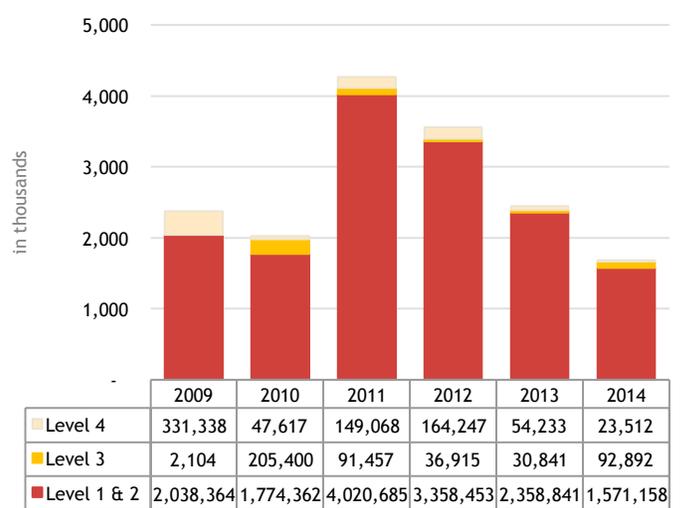
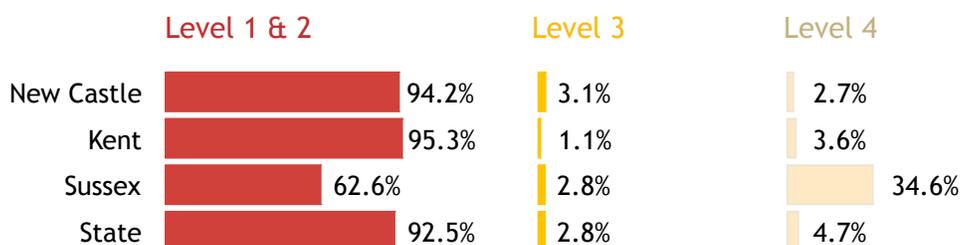


Figure A.8 Non-residential Square-footage Based on Development Applications, percentage by Investment Level, 2009-2014, New Castle County, Kent County, Sussex County, and State of Delaware



Building Permits

Building permits are issued by the county or local jurisdiction and represent a stage in the development process further along than development applications. Building permits are required before actual construction can occur, and are therefore a good measure of actual or likely development activity.

Residential Trends

Table A.8 summarizes the occurrence of residential building permits by county from 2009 through 2014, based on number of units permitted.

Table A.8 Residential Units Approved by Building Permit

County	2009	2010	2011	2012	2013	2014	Total
New Castle	764	779	639	787	1,569	1,889	6,427
Kent	723	574	685	778	914	994	4,668
Sussex	1,683	1,524	1,684	1,881	2,410	2,610	11,792
Total	3,170	2,877	3,008	3,446	4,893	5,493	22,887

Table A.9 shows the distribution of residential building permit activity by local jurisdiction.

Table A.9 Residential Building Permit Activity

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
New Castle County*	449	582	497	630	1,166	1,111	4,435
Ardentown	-	-	-	-	-	1	1
Bellefonte	-	-	-	-	16	-	16
Delaware City	-	3	1	-	-	2	6
Elsmere	-	1	-	-	-	3	4
Middletown	148	105	47	72	113	182	667
New Castle	78	4	-	4	-	6	92
Newark	33	33	31	45	21	300	463
Newport	-	-	-	-	-	-	-
Odessa	-	-	2	-	-	-	2
Smyrna	-	-	-	-	-	-	-
Townsend	11	12	14	15	18	26	96
Wilmington	45	39	47	21	235	258	645
New Castle Total	764	779	639	787	1,569	1,889	6,427
Kent County*	397	317	451	561	652	665	3,043

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
Bowers Beach	1	-	-	-	-	2	3
Camden	4	-	-	-	4	3	11
Cheswold	-	-	-	1	-	1	2
Clayton	13	4	22	9	28	26	102
Dover	78	129	98	38	99	143	585
Farmington	-	-	-	-	2	2	4
Felton	5	2	3	5	2	4	21
Frederica	2	4	6	-	17	30	59
Harrington	6	27	3	1	1	4	42
Hartly	-	-	-	-	-	-	-
Houston	-	1	-	-	-	-	1
Kenton	-	1	-	-	-	2	3
Leipsic	-	-	-	-	-	-	-
Little Creek	-	-	-	-	-	1	1
Magnolia	3	-	-	-	-	-	3
Milford	7	3	6	88	3	5	112
Smyrna	201	80	80	65	89	106	621
Viola	-	-	-	-	-	-	-
Woodside	-	-	1	-	-	-	1
Wyoming	6	6	15	10	17	-	54
Kent Total	723	574	685	778	914	994	4,668
Sussex County*	1,296	1,227	1,158	1,517	1,886	1,902	8,986
Bethany Beach	8	22	8	5	12	18	73
Bethel	-	1	1	-	-	-	2
Blades	-	1	1	2	-	-	4
Bridgeville	24	20	28	31	49	48	200
Dagsboro	6	6	3	3	8	9	35
Delmar	1	3	7	7	2	2	22
Dewey Beach	2	1	4	-	1	13	21
Ellendale	1	-	-	-	-	3	4
Farmington	-	-	-	-	-	-	-
Fenwick Island	5	4	4	6	5	10	34
Frankford	1	-	1	-	1	4	7
Georgetown	50	2	8	53	6	54	173
Greenwood	3	4	4	1	7	1	20
Henlopen Acres	-	3	3	-	-	2	8
Laurel	6	6	15	-	-	2	29
Lewes	24	22	26	47	59	71	249
Milford	13	39	25	21	16	39	153
Millsboro	41	35	123	46	89	139	473
Millville	80	35	83	79	115	133	525
Milton	33	19	19	17	33	45	166
Ocean View	36	38	30	14	-	47	165
Rehoboth Beach	18	10	16	20	31	28	123
Seaford	7	8	100	3	67	14	199
Selbyville	16	7	3	-	9	15	50
Slaughter Beach	2	3	3	3	-	1	12
South Bethany	10	8	11	6	14	10	59
Sussex Total	1,683	1,524	1,684	1,881	2,410	2,610	11,792
State Total	3,170	2,877	3,008	3,446	4,893	5,493	22,887

*Represents building permits in unincorporated areas of the county

The map in Figure A.9 presents the distribution and intensity of residential building permits across the state.

Figure A.9 Residential Building Permits 2008-2014

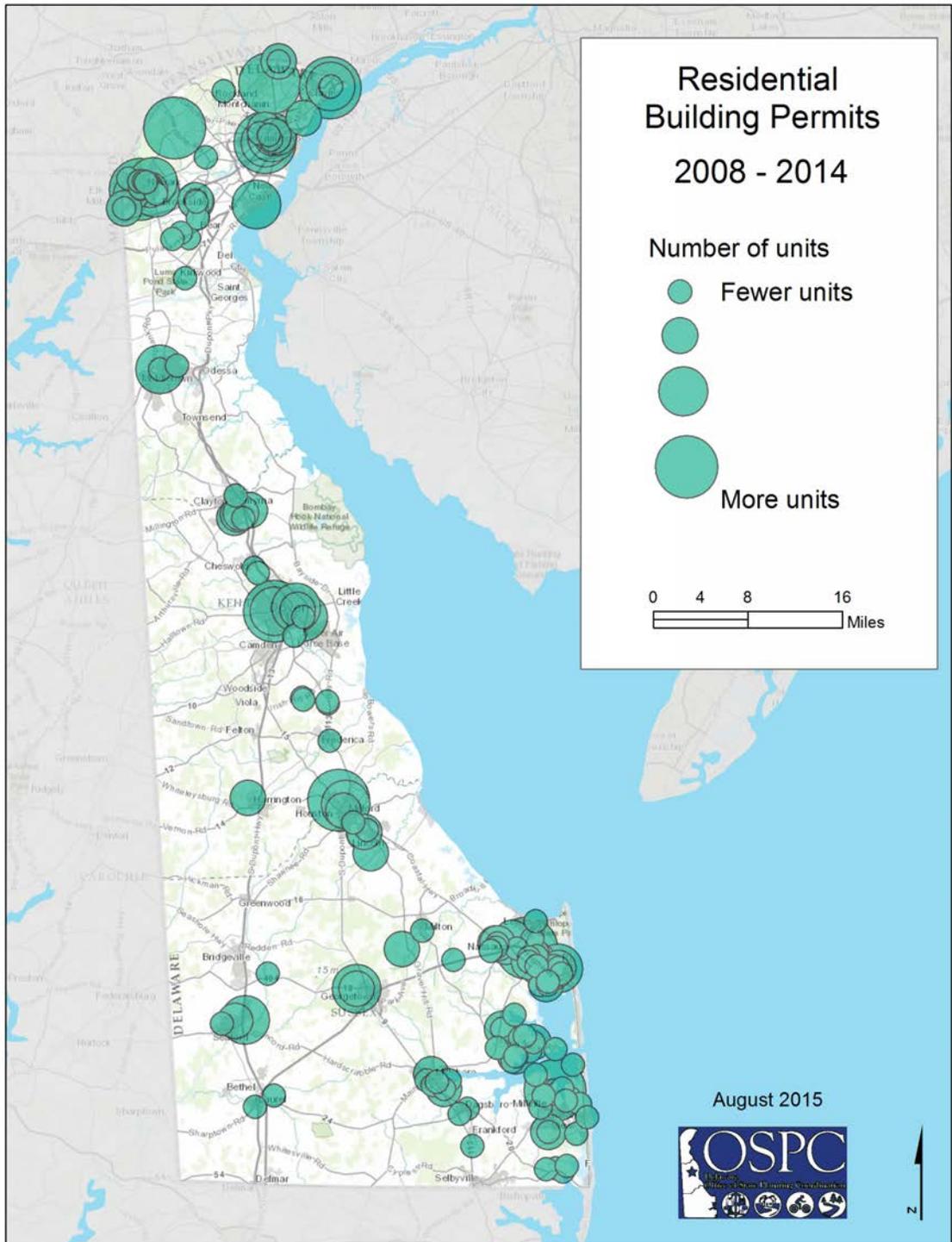


Figure A.10 Residential Building Permits and Investment Level 2008-2014

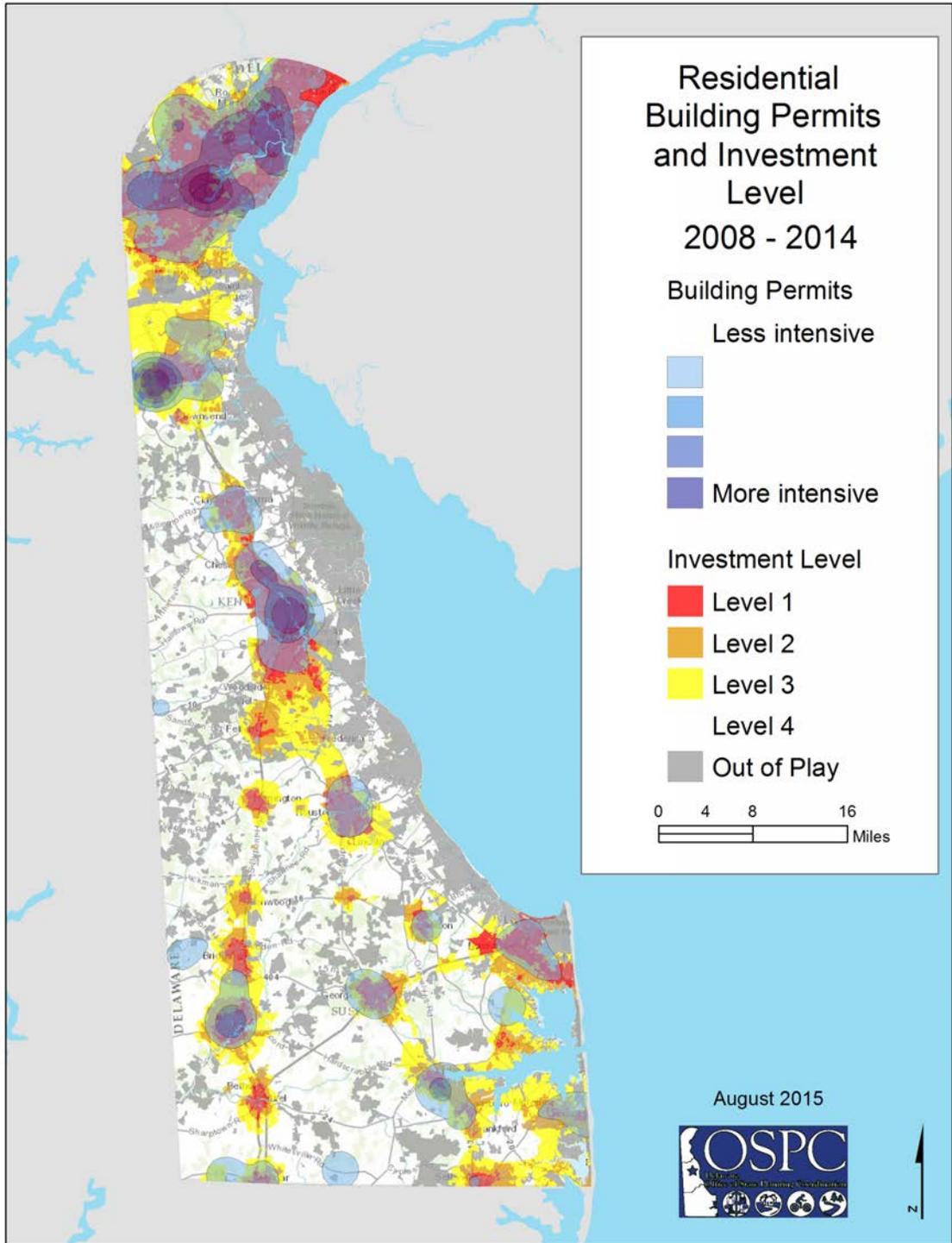


Figure A.10 shows the intensity of permit activity by investment level. The map indicates that most permits occur in areas appropriate for development within Level 1 and 2 Investment Levels.

Table A.10 shows the distribution of residential building permits by county, for each investment level.

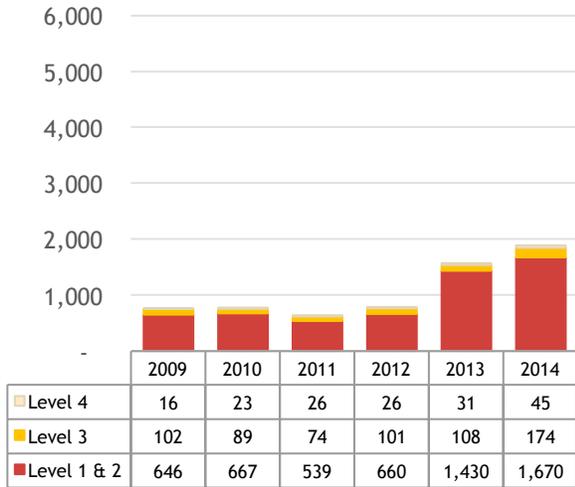
Table A.10 Residential units in building permits by county and investment level, 2009-2014

	2009	2010	2011	2012	2013	2014	2009-2014
New Castle							
	Total Units						
Level 1 & 2	646	667	539	660	1,430	1,670	5,612
Level 3	102	89	74	101	108	174	648
Level 4	16	23	26	26	31	45	167
New Castle Total	764	779	639	787	1,569	1,889	6,427
Kent							
Level 1 & 2	535	442	520	596	706	751	3,550
Level 3	22	23	23	42	53	49	212
Level 4	166	109	142	140	155	194	906
Kent Total	723	574	685	778	914	994	4,668
Sussex							
Level 1 & 2	894	834	1,029	1,002	1,328	1,540	6,627
Level 3	339	379	382	478	611	547	2,736
Level 4	450	311	273	401	471	523	2,429
Sussex Total	1,683	1,524	1,684	1,881	2,410	2,610	11,792
Delaware							
Level 1 & 2	2,075	1,943	2,088	2,258	3,464	3,961	15,789
Level 3	463	491	479	621	772	770	3,596
Level 4	632	443	441	567	657	762	3,502
State Total	3,170	2,877	3,008	3,446	4,893	5,493	22,887

The graphs in Figure A.11 show the number of residential units in approved building permits, by investment level for the years 2009-2014, for each county and the state.

Figure A.11 Residential Units Based on Building Permits, New Castle County, Kent County, Sussex County, and State of Delaware

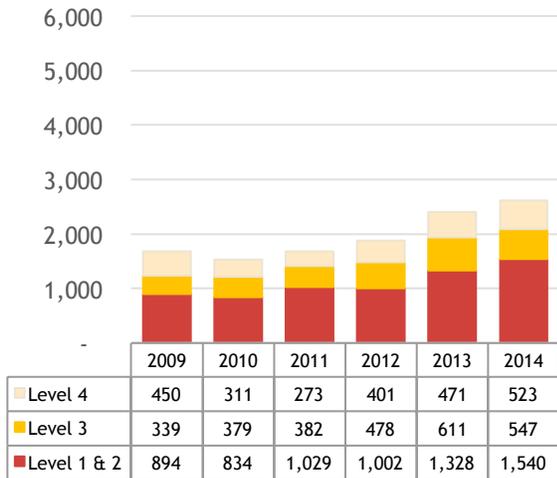
New Castle County



Kent County



Sussex County



State of Delaware

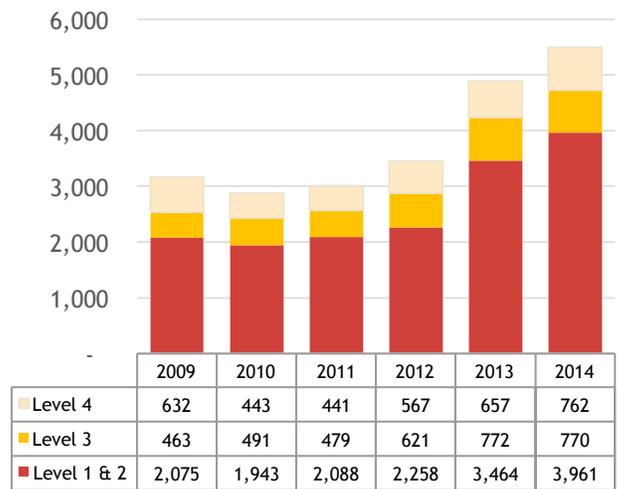
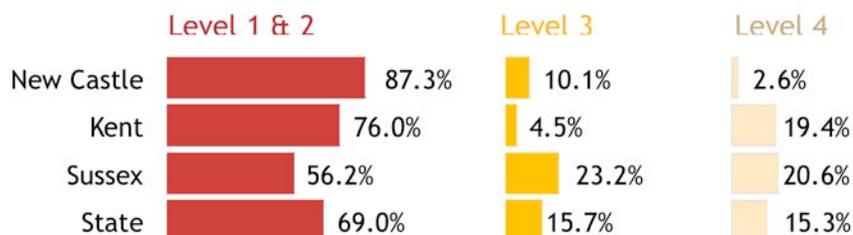


Figure A.12 shows the proportions of permits issued by investment level, for each county and the state.

Figure A.12 Residential Units Based on Building Permits, percentage by Investment Level, 2009-2014, New Castle County, Kent County, Sussex County, and State of Delaware



Non-residential Trends

Table A.11 summarizes the non-residential square-footage permitted by county, from 2009 through 2014.

Table A.11 Non-residential Square-footage Approved by Building Permit

County	2009	2010	2011	2012	2013	2014	Total
New Castle	1,114,275	1,320,617	1,274,651	2,842,924	1,545,518	2,324,904	10,422,889
Kent	576,839	414,963	321,718	252,944	355,212	382,310	2,303,986
Sussex	169,016	283,456	461,592	1,427,509	372,588	682,484	3,396,645
Total	1,860,130	2,019,036	2,057,961	4,523,377	2,273,318	3,389,698	16,123,520

Table A.12 presents the level of non-residential building permit activity within each local jurisdiction.

Table A.12 Non-residential Building Permit Activity

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
New Castle County*	579,224	858,277	589,629	1,241,297	1,403,488	2,118,840	6,790,755
Bellefonte	-	-	-	-	-	-	-
Delaware City	-	-	-	-	-	-	-
Elsmere	-	-	-	-	-	-	-
Middletown	48,982	10,460	429,691	1,322,377	117,750	52,503	1,981,763
New Castle	-	1,200	-	1,200	-	58,310	60,710
Newark	21,330	414,710	10,500	-	-	73,144	519,684
Newport	-	-	-	-	-	-	-
Odessa	-	-	-	-	-	-	-
Smyrna	-	-	-	-	-	-	-
Townsend	-	-	-	-	-	-	-
Wilmington	464,739	35,970	244,831	278,050	24,280	22,107	1,069,977
New Castle Total	1,114,275	1,320,617	1,274,651	2,842,924	1,545,518	2,324,904	10,422,889
Kent County*	311,740	229,182	-	23,145	153,498	63,991	781,556
Bowers Beach	-	-	-	-	-	-	-
Camden	-	-	-	62,556	33,420	-	95,976

Jurisdiction	2009	2010	2011	2012	2013	2014	2009-2014
Cheswold	-	-	-	-	-	8,320	8,320
Clayton	-	90,075	-	-	-	-	90,075
Dover	161,099	67,281	310,807	93,739	142,041	246,086	1,021,053
Farmington	-	-	-	-	-	8,500	8,500
Felton	-	5,125	-	9,100	-	-	14,225
Frederica	-	-	-	-	-	8,320	8,320
Harrington	-	16,300	5,125	-	-	-	21,425
Hartly	-	-	-	-	-	-	-
Houston	-	-	-	-	-	-	-
Kenton	-	-	-	-	-	-	-
Leipsic	-	-	-	-	-	-	-
Little Creek	-	-	-	-	-	-	-
Magnolia	-	-	-	-	-	-	-
Milford	99,000	7,000	5,786	21,984	25,425	37,493	196,688
Smyrna	5,000	-	-	42,420	828	9,600	57,848
Viola	-	-	-	-	-	-	-
Woodside	-	-	-	-	-	-	-
Wyoming	-	-	-	-	-	-	-
Kent Total	576,839	414,963	321,718	252,944	355,212	382,310	2,303,986
Sussex County*	46,200	215,473	313,156	815,006	233,058	303,227	1,926,120
Bethany Beach	-	-	-	-	-	132,845	132,845
Bethel	-	-	-	-	-	-	-
Blades	-	-	-	-	-	-	-
Bridgeville	-	-	-	-	-	23,975	23,975
Dagsboro	-	-	5,000	32,601	-	-	37,601
Delmar	-	15,400	-	-	8,282	15,178	38,860
Dewey Beach	-	-	-	-	-	28,800	28,800
Ellendale	-	-	-	-	-	-	-
Farmington	-	-	-	-	-	-	-
Fenwick Island	-	-	2,952	-	-	-	2,952
Frankford	-	-	-	-	-	-	-
Georgetown	4,300	5,719	48,218	18,850	46,600	55,797	179,484
Greenwood	-	-	-	25,000	-	-	25,000
Henlopen Acres	-	-	-	-	-	-	-
Laurel	-	-	-	-	-	1,560	1,560
Lewes	-	-	6,817	-	6,000	51,040	63,857
Milford	74,544	27,588	49,223	4,800	-	-	156,155
Millsboro	1,656	9,500	11,722	55,863	-	15,154	93,895
Millville	-	-	-	9,700	36,184	-	45,884
Milton	6,253	-	-	101,000	-	4,050	111,303
Ocean View	-	-	-	13,000	-	-	13,000
Rehoboth Beach	-	-	-	-	2,080	-	2,080
Seaford	21,388	7,276	24,504	351,689	5,880	43,044	453,781
Selbyville	14,675	2,500	-	-	34,504	7,814	59,493
Slaughter Beach	-	-	-	-	-	-	-
South Bethany	-	-	-	-	-	-	-
Sussex Total	169,016	283,456	461,592	1,427,509	372,588	682,484	3,396,645
State Total	1,860,130	2,019,036	2,057,961	4,523,377	2,273,318	3,389,698	16,123,520

*Represents building permits in unincorporated areas of the county

Figure A.13 presents a map of building permit activity, with each dot indicating a permit and the size of the dot reflecting the square-footage permitted.

Figure A.13 Non-residential Building Permits 2008-2014

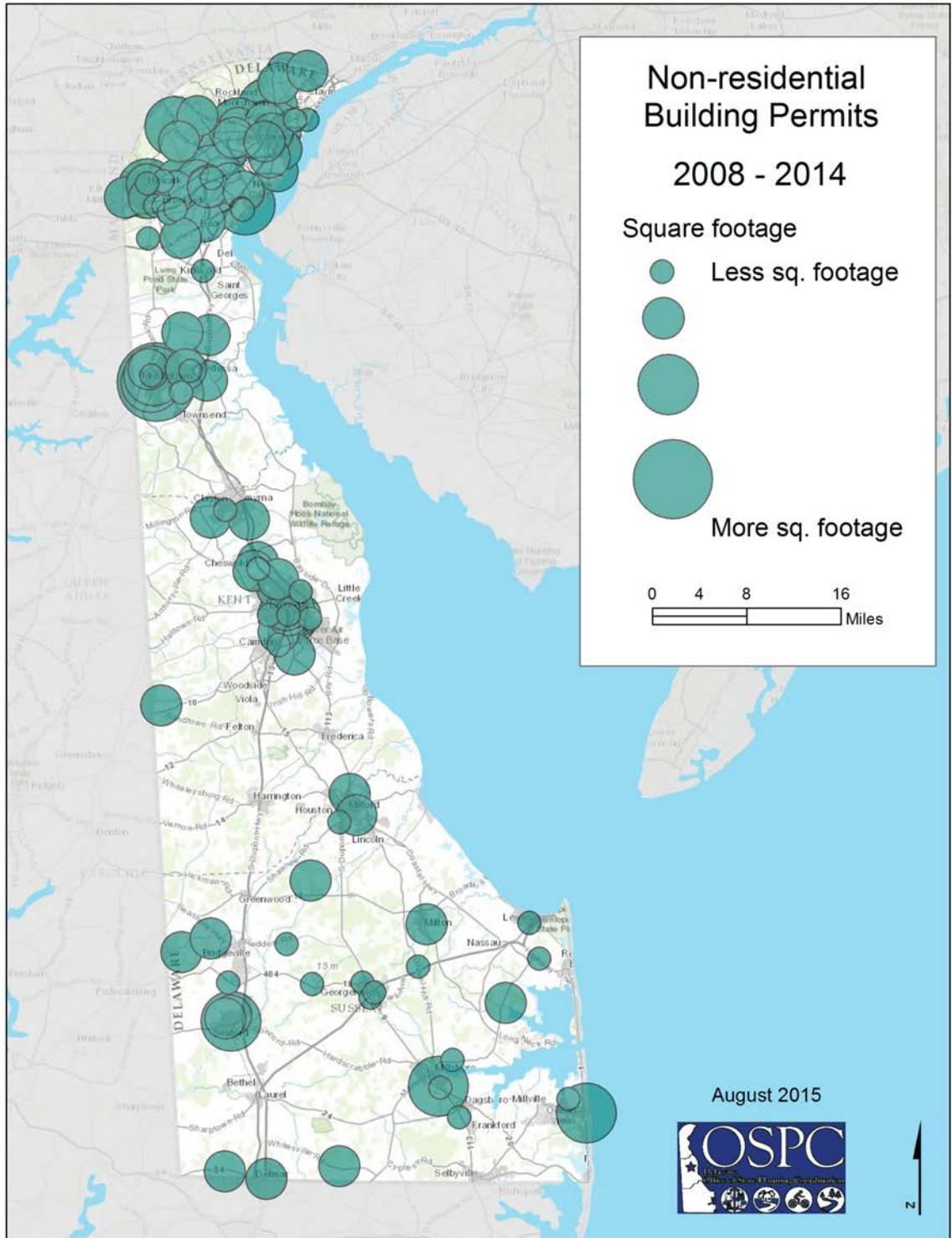


Figure A.14 shows the distribution of development intensity based on square-footage permitted between 2008 and 2014, overlaid on the *State Strategies* investment levels.

Figure A.14 Non-residential Building Permits and Investment Level 2008-2014

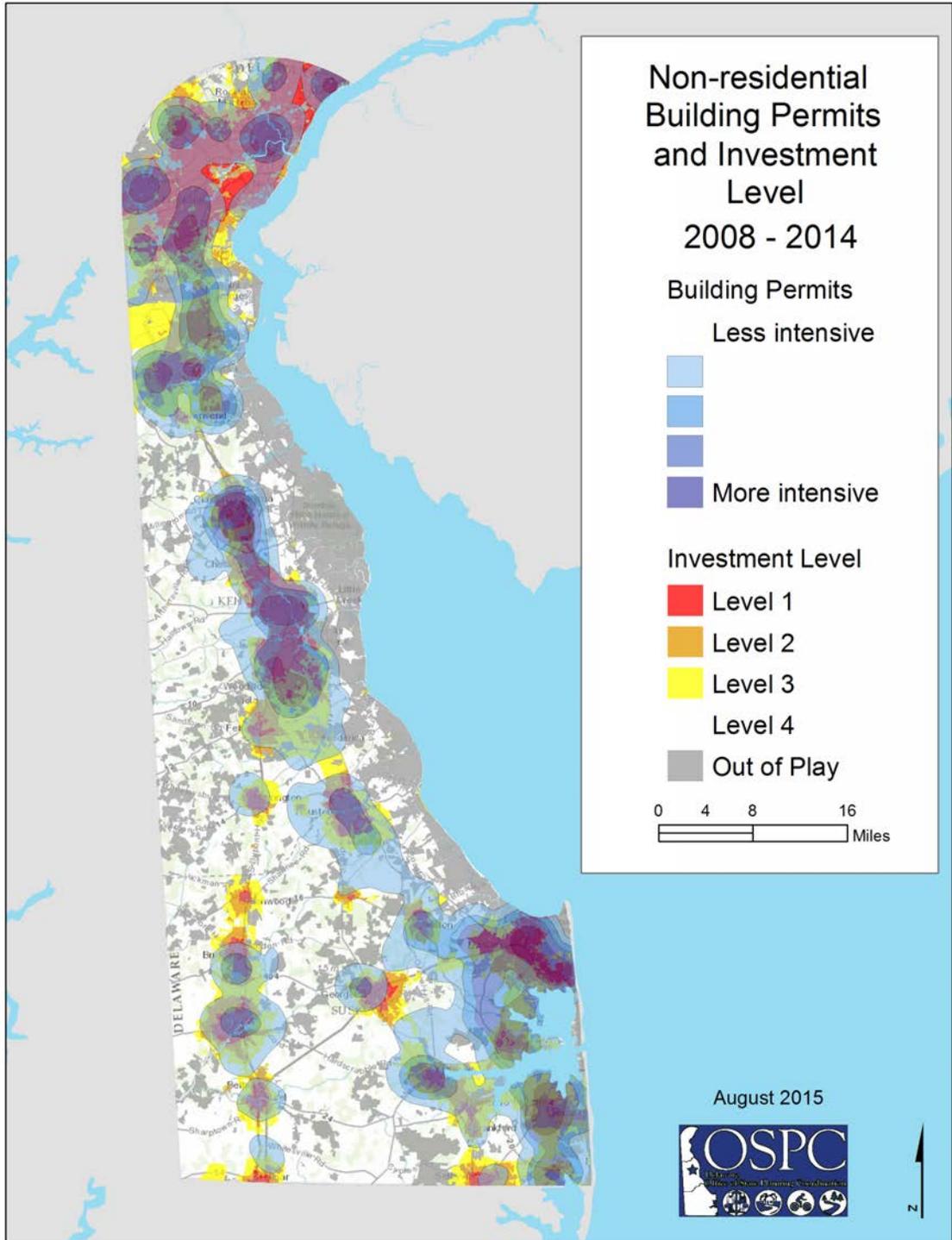


Table A.13 shows the non-residential square-footage permitted by county and investment level.

Table A.13 Non-Residential Square-footage in Building Permits by County and Investment Level, 2009-2014

	2009	2010	2011	2012	2013	2014	2009-2014
New Castle							Total Sq. Ft.
Level 1 & 2	1,086,766	1,272,482	1,261,901	2,835,861	1,523,452	2,318,408	10,298,870
Level 3	10,891	48,135	8,900	5,440	-	4,600	77,966
Level 4	16,618	-	3,850	1,623	22,066	1,896	46,053
New Castle Total	1,114,275	1,320,617	1,274,651	2,842,924	1,545,518	2,324,904	10,422,889
Kent							
Level 1 & 2	525,436	379,134	321,718	237,633	321,977	334,550	2,120,448
Level 3	4,256	23,809	-	4,549	6,375	-	38,989
Level 4	47,147	12,020	-	10,762	26,860	47,760	144,549
Kent Total	576,839	414,963	321,718	252,944	355,212	382,310	2,303,986
Sussex							
Level 1 & 2	139,016	93,028	171,002	717,969	326,097	525,566	1,972,678
Level 3	-	67,480	134,018	376,346	11,896	52,928	642,668
Level 4	30,000	122,948	156,572	333,194	34,595	103,990	781,299
Sussex Total	169,016	283,456	461,592	1,427,509	372,588	682,484	3,396,645
Delaware							
Level 1 & 2	1,751,218	1,744,644	1,754,621	3,791,463	2,171,526	3,178,524	14,391,996
Level 3	15,147	139,424	142,918	386,335	18,271	57,528	759,623
Level 4	93,765	134,968	160,422	345,579	83,521	153,646	971,901
State Total	1,860,130	2,019,036	2,057,961	4,523,377	2,273,318	3,389,698	16,123,520

The graphs in Figure A.15 show the square-footage of non-residential building permits, by investment level by year, for each county and the state.

Figure A.15 Non-residential Square-footage based on Building Permits, New Castle County, Kent County, Sussex County, and State of Delaware

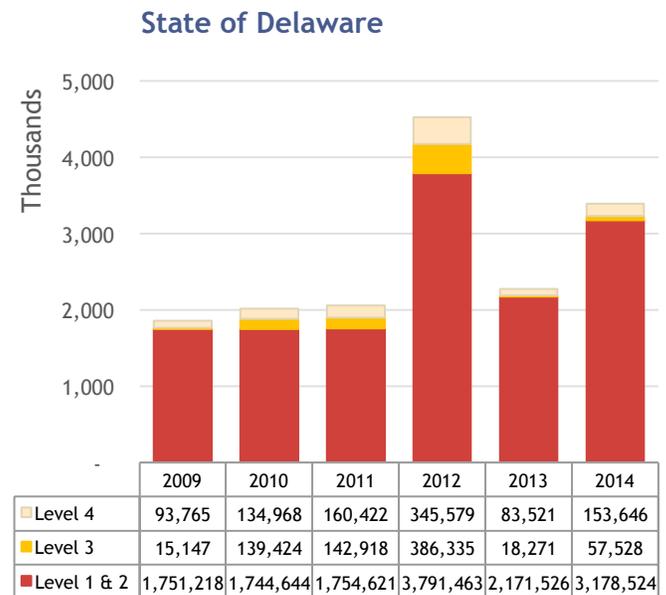
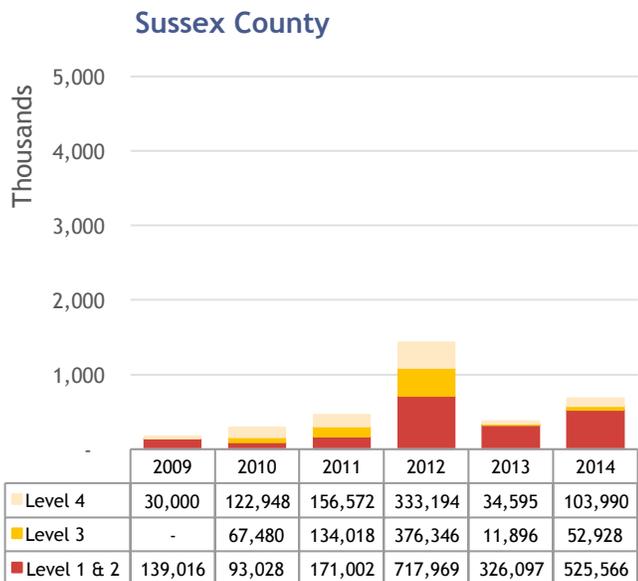
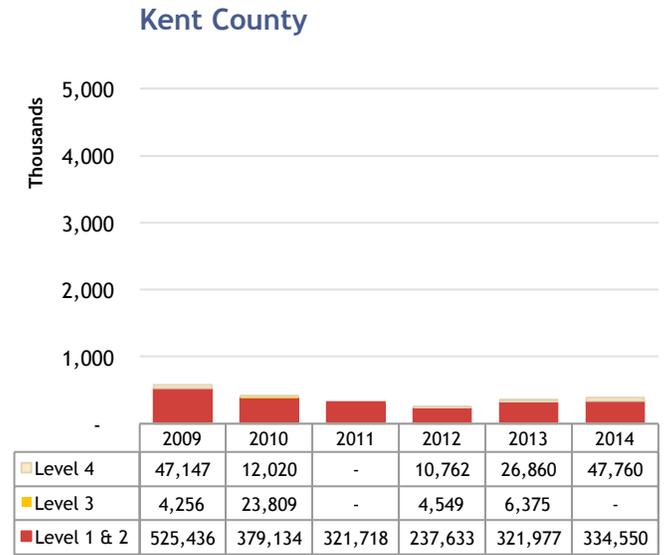
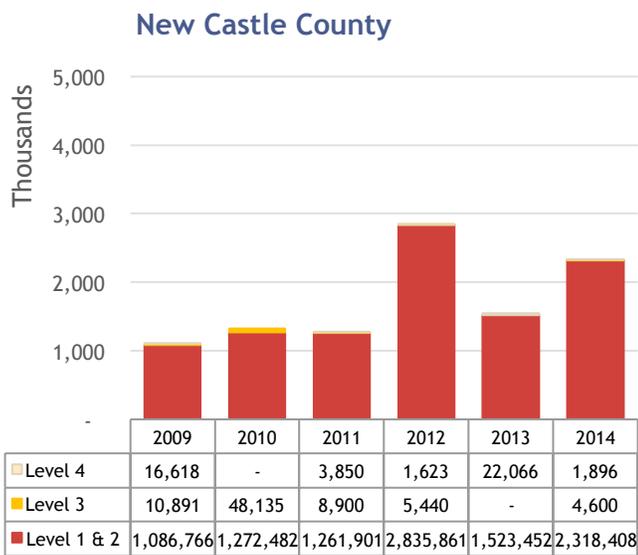
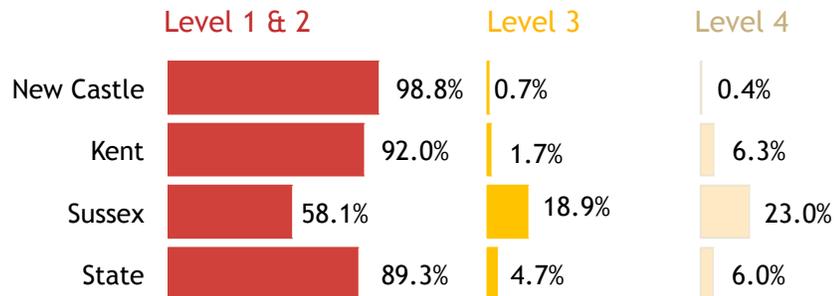


Figure A.16 show the proportion of non-residential square-footage, by investment level, permitted within each county and the state.

Figure A.16 Non-residential Square-footage based on Building Permits, Percentage by Investment Level, 2009-2014, New Castle County, Kent County, Sussex County, and State of Delaware



Development Trends Discussion

Residential Development

Development applications have seen wide variation from 2009 to 2014. Statewide, there was an increase in application activity in 2010, possibly reflecting a recovery in the building sector following the 2008 recession. New Castle County has seen the most development application activity. However, the number of building permits issued, which is a better indicator of actual development, is roughly equivalent in New Castle and Sussex Counties. Kent County has a lower rate of development application activity throughout the period.

Overall, development applications (in terms of number of units) have dropped steadily statewide since the peak in 2010.

Residential building permit activity over the period reflects an opposite, positive trend, with a low point in 2010, and a gradual recovery in the subsequent years. The largest yearly increase in building permits took place in 2013, especially in New Castle and Sussex Counties, with 2014 continuing the upward residential trend. Kent County saw a similar but less pronounced upward trend in building permit activity after 2010.

The increase in recent years may indicate a better “conversion rate,” in which more units proposed in the development application phase eventually receive building permits. The trend may also indicate a lag in the time between development application and building permit for specific projects.

Non-residential Development

Non-residential development activity, as reflected both in development applications and building permits has centered primarily in New Castle County. In 2011, there was a strong recovery in the amount of non-residential square-footage reflected in the development application data for New Castle County. Subsequent years saw a decline in this activity.

Building permit information also exhibits a sharp rise in 2012, consistent with the increase in development applications from the previous year. Kent County has seen an overall low rate of non-residential activity. Sussex County reflects the trend in New Castle County, though at

significantly lower levels. The amount of square-footage being developed in both New Castle and Sussex Counties saw strong recovery in 2014.

The overall decline, most pronounced in New Castle County, of square-footage specified in development applications over the past few years may be of concern for the overall economic outlook in the non-residential sector. Less square-footage approved in one year means a likely decrease in actual square-footage built in subsequent years.

Agreement with Growth Policies

The location of new development depends on many factors, including state infrastructure investments, county and municipal land-use plans, local development regulations, real estate market demands, lending practices, viability of individual land developers, and consumer preferences. The 2010 *Strategies for State Policies and Spending* sets forth priorities for growth on the part of state agencies.

By indicating where the state is most likely to invest in infrastructure and other services, the *State Strategies* aims to guide growth to where it is most suited. The locations of development applications and building permits are a metric that allows the effectiveness of those policies to be assessed.

When development, as measured by development applications and building permits, occurs in areas where the state seeks to foster growth, and conversely, does not occur in those areas where it is felt development should not occur, it may be inferred that the policies are succeeding.

Table A.14 summarizes the number of residential units and non-residential square-footage represented in all development applications for the six-year period from 2009 to 2014.

Table A.14 Summary of Development Application Activity by County and Investment Level, 2009-2014

County	Levels 1 & 2	Level 3	Level 4	% in growth zones	% outside growth zones
Residential Units					
New Castle County	10,631	1,199	194	98%	2%
Kent County	3,414	445	209	95%	5%
Sussex County	4,021	1,037	3,195	61%	39%
Non-Residential Square-footage					
New Castle County	12,284,986	407,760	350,982	97%	3%
Kent County	2,232,057	25,265	84,335	96%	4%
Sussex County	604,820	26,584	334,698	65%	35%

Based on development applications, residential growth in New Castle County focused largely in areas where it is encouraged (Levels 1 through 3), with 98 percent of units targeted there. Kent County had a similarly high percentage (95%) of residential units in growth zones, while Sussex County had the lowest rate of units in growth zones, at 61 percent.

A similar pattern is seen in the square-footage represented in development applications, with 97, 96, and 65 percent of total square-footage occurring in growth zones in New Castle, Kent, and Sussex Counties, respectively.

Table A.15 summarizes the number of residential units and non-residential square-footage represented in all building permits for the six-year period from 2009 to 2014.

Table A.15 Summary of Building Permit Activity by County and Investment Level, 2009-2014

County	Levels 1 & 2	Level 3	Level 4	% in growth zones	% outside growth zones
<i>Residential Units</i>					
New Castle County	5,612	648	167	97%	3%
Kent County	3,550	212	906	81%	19%
Sussex County	6,627	2,736	2,429	79%	21%
<i>Non-Residential Square-footage</i>					
New Castle County	10,298,870	77,966	46,053	99.6%	0.4%
Kent County	2,120,448	38,989	144,549	94%	6%
Sussex County	1,972,678	642,668	781,299	77%	23%

Based on building permits, New Castle County again had the highest percentage of growth (97%) focused in designated growth zones. Kent and Sussex Counties had somewhat lower proportions of residential units in growth zones, at 81 and 79 percent, respectively.

Nearly all square-footage in New Castle County was targeted in growth zones based on building permit activity. In Kent County, most of the non-residential growth (94%) was directed at growth areas, while in Sussex County, the proportion was 77 percent.

Overview of Methodology

The OSPC and IPA conducted a spatial analysis in order to examine the location and extent of recently approved development across Delaware. Spatial analysis was performed using the ArcMap GIS software package produced by Environmental Systems Research Institute, Inc. (ESRI). The best available spatial datasets were identified and used in order to perform the analysis and compare development activity relative to the 2010 *Strategies for State Policies and Spending Investment Levels*.

The OSPC obtain development application and building permit data from Delaware's municipalities and counties for each year from 2008 onward. These data form the basis for the spatial analysis. For each building permit or development application, the data included parcel identification, the number of residential units and/or amount of non-residential square-footage associated with the permit or application. In some cases street address or other locational information (e.g., subdivision name, crossroads) pertaining to the particular permit or application was included. All development data were structured and compiled into a single, consistent data set in ESRI Geodatabase format.

The results of this analysis should be used to gauge general trends in development activity across the state. The magnitude and direction of trends can be determined in this way, but precise levels of development should not be inferred from the analysis.

Appendix B: State Financial Investments Supporting Recent Trends

In support of a growing population and changing demographics, the state government provides a variety of infrastructure and services. In accordance with the *Strategies for State Policies and Spending* and the Governor's land use agenda, Delaware has strategically invested state taxpayer dollars in important infrastructure and services. These funds help pay for public education, transportation, water and wastewater, public safety, agricultural and forest preservation, and housing. The following are some highlights showing fiscal trends and indicators from the past five fiscal years.

Education

In fiscal year 2015, the Department of Education's capital expenditures for public education equaled \$88,044,583, which included \$47,640,976 for new construction and land acquisition (combined state and local funds). The remaining funds were used for maintenance and upgrades to existing school facilities. The operating budget for public education was \$1.27 billion in FY15, which represented approximately one third of Delaware's general fund budget.

Table B.1 Public Education Trends and Indicators FY11-FY15

	FY11	FY12	FY13	FY14	FY15
Total Enrollment*	128,503	130,102	131,029	132,841	134,442
Charter School Enrollment	9,525	10,322	10,438	11,078	12,521
State Portion, Public Education Operating Budget (in thousands)	\$1,044,165.8	\$1,109,671.9	\$1,168,662.8	\$1,217,757.5	\$1,267,581.1
State Portion, Education Bond Bill	\$102,369,017	\$125,547,000	\$119,800,000	\$103,621,200	\$90,601,237
State Portion, New Construction and Land Acquisition**	\$57,822,117 [^]	\$67,932,000	\$71,194,800	\$55,542,500	\$19,983,900
New Schools Opened<<	1	3	3	0	1

Source: Delaware Office of Management and Budget; Delaware Department of Education

* Total enrollment includes charter school enrollment.

** New Construction and Land Acquisition is a subset of the Education Bond Bill. The remaining portion of the Education Bond Bill funded other capital projects at school facilities.

[^] FY11 Education Bond Bill includes extraordinary site costs for two school projects that were necessary to complete before construction could begin.

<< New schools are public schools that involve the construction of a new building utilizing state capital funds. Building additions and charter schools are not included.

Enrollment in public schools continues to rise, having increased from 128,503 during the 2010-2011 school year to 134,442 in the 2014-2015 school year. These figures include students in charter schools, which receive operating funds but not capital funds from the state.

In order to address increasing enrollment and the need for modern, updated facilities, one new elementary school opened in the fall of 2015 (FY16) in the Red Clay Consolidated School District. In addition, construction is to begin on a new elementary school in the Cape Henlopen School District in FY16, and an elementary school is in the planning stages in the Laurel School District. In order to maximize the benefits to the communities and leverage state and local school-district investments, all of these facilities are located in Levels 1, 2, or 3 of the *Strategies for State Policies and Spending*.

Infrastructure

Trails and Pathways

In 2011, Governor Jack Markell requested the Delaware Department of Transportation (DelDOT) and the Delaware Department of Natural Resources and Environmental Control (DNREC) to research and develop a comprehensive statewide trails and pathways plan to establish a premiere interconnected network of shared-use pathways and trails that will support non-motorized travel and recreational trails opportunities within the State of Delaware for Delawareans and visitors alike.

This initiative recognizes the benefits of an integrated non-motorized pathway and recreational trail network to provide opportunities for pedestrians and bicyclists to travel safely and efficiently and to expand outdoor recreation opportunities while enjoying the natural, cultural, and historic assets of Delaware. It also recognizes the benefits of an integrated multi-modal transportation infrastructure in improving the economic and environmental sustainability of communities, thereby improving the quality of life for all citizens.

Furthermore, the initiative will support the creation of jobs resulting in investments for bicycling and walking. It will also support construction and trail maintenance jobs. Investing in trails and pathways will create tourism opportunities, support tourism-related jobs, and support recreationally related goods and services.

Since the initiative's inception in July 2011, it has been funded in FY12 through FY16 as indicated in the table below.

Table B.2 First State Trails and Pathways Funding FY12-FY16

Agency	FY12	FY13	FY14	FY15	FY16	Total
DNREC	\$7,000,000	\$3,000,000	\$3,000,000	\$2,700,000	\$3,000,000	\$18,700,000
DelDOT	\$0	\$10,000,000	\$0	\$0	\$0	\$10,000,000
Total	\$7,000,000	\$13,000,000	\$3,000,000	\$2,700,000	\$3,000,000	\$28,700,000

This program has enabled the construction of trails in all three of Delaware's counties. The program is a collaboration between DNREC and DelDOT. DNREC continues to work on a wide variety of trail projects in all counties including Lums Pond; Brandywine Creek State Park and White Clay State park in New Castle County; McClements Preserve in Kent County; and Gordons Pond Trail (completed); Assawoman Canal Trail; and Park Road Pathway (completed) in Sussex County.

The following table details the projects that are currently under construction by DelDOT. Numerous other projects are in the design and concept planning stages.

Table B.3 Trail Project Summary and Status

Name	Summary and Status
<i>New Castle County</i>	
C&D Canal Mainline Pathway	Total of 9.5 miles of pathway and 2 trail heads. Completed.
C&D Branch Canal Section	Section of trail that connects the C&D canal trail (east end) to Delaware City. Completed.
C&D Canal, Mainline to MD Border	Section of trail connecting west end of C&D Canal trail to MD state line. South Lums Pond trailhead and Tier 2 access roads to be constructed before the end of 2015.
Hopkins Bridge Road Pedestrian Improvements	Trail improvements along Hopkins Bridge Road near White Clay Creek State Park. Connecting 2 trail systems. Completed.
Northern Delaware Greenway, Tally Road Trail	Greenway path constructed along Tally Road between Weldin Ridge Road and Miller Road. Completed.
Route 273 Multi-Use Pathway	Multi-use trail from Farmers Market to 10th Street. Completed.
New Castle Industrial Track, Phase III	Bridge crossing of the Christiana River and elevated boardwalk through the marsh to connect to DuPont Environmental Center and Wilmington River Walk. Construction anticipated in summer of 2016.
<i>Kent County</i>	
Capital City Trail Phase I	Multi-use trail from Public Safety Blvd. along US13 north to MLK Blvd. and terminating near Legislative Hall. Completed.
Capital City Trail Phase II	Multi-use trail from Archives building to Loockerman Street. Completed
Capital City Trail Phase III	Extends multi-use trail. Completed.
Route 10 Bridge Crossing to Gateway Shopping Center	Multi-use pathway on south side of Route 10 from Generals Green to the Gateway South shopping center. Scheduled for completion in November 2015.
Delaware State University	Working with DSU to install pedestrian safety improvements along Route 13 adjacent to campus. Under construction, scheduled to be completed in September 2015.
<i>Sussex County</i>	
Garfield Parkway Pedestrian and Bicycle Improvements	Pedestrian and bicycle improvements along Garfield Parkway from SR1 to Atlantic Avenue. Completed.
Junction and Breakwater Trail, Showfield Extension	Extends existing trail at Gills Neck Road along an acquired permanent easement to Kings Highway and ending at a point along Gills Neck Road. Completed.
Georgetown to Lewes Rail with Trail, Phase I	Trail to be located along abandoned railroad corridor from Gills Neck Road to Savannah Road within the City of Lewes. Construction scheduled to begin in April 2016 and be completed by November 2016.

Roads and Bridges

DelDOT is responsible for maintaining approximately 90 percent of all roads in Delaware compared with other states, which maintain about 20 percent of their roads. The state also is responsible for transit services. Responding to the demands of Delawareans for a safe, efficient transportation system is a challenge, especially in light of recent growth and development trends. In FY15, DelDOT made capital expenditures of over \$135.6 million in state funds to address Delaware's transportation needs. Total capital spending in FY15 was more than \$372.5 million, including federal funds.

Table B.4 demonstrates a number of trends that are relevant to transportation planning. After several years of decline, the number of registered motor vehicles and the vehicle miles travelled (VMT) in Delaware are both on the rise again, and have been since FY12. Ridership of the Septa R2 rail line has increased during the last fiscal year while the Dart fixed-route service ridership decreased for the third fiscal year in a row. Paratransit ridership also decreased this past fiscal year from last year's 1 million trips to just 998 thousand trips. This still represents the third highest ridership figure in the past five fiscal years.



Grade separated intersection at North Frederica.

Table B.4 Transportation Trends and Indicators FY11-FY15

	FY11	FY12	FY13	FY14	FY15
Licensed Drivers	652,336	657,243	666,515	672,744	681,165
Registered Motor Vehicles*	822,151	828,708	837,214	855,051	879,138
Vehicle Miles Traveled* (billions)	8.9	9.0	9.1	9.3	9.5
DART R2 Rail Ridership	1,158,650	1,207,921	1,006,698	1,225,507	1,273,590
DART Fixed Route Ridership (millions)	9.9	10.6	10.2	9.9	9.3
Paratransit Ridership	968,323	993,011	1,232,098	1,018,249	998,920
Transportation Trust Fund Revenues (thousands)	\$432,400	\$496,514	\$506,955	\$533,600	507,724
State Capital Expenditures (thousands)	\$127,500	\$191,304	\$188,030	\$170,970	\$135,597
Federal Capital Expenditures (thousands)	\$200,700	\$213,176	\$214,535	\$201,257	\$236,919
Total Capital Expenditures (thousands)	\$328,200	\$404,480	\$402,565	\$372,227	\$372,516

Source: Delaware Office of Management and Budget; Delaware Department of Transportation

* Data for calendar year

Water and Wastewater

While the operation of drinking water and wastewater systems has traditionally been the domain of Delaware's local governments, the state Department of Health and Social Services (DHSS) and DNREC do provide significant funding to allow for the improvement and expansion of these systems. Table B.5 lists recent state and federal expenditures on water and wastewater projects through the Water Pollution Control Funds, which are programs that are administered by DNREC to provide support for community water and wastewater service projects. The state has also provided assistance for wastewater projects through a 21st Century Fund Wastewater Management Account.

Table B.5 Water and Wastewater Funding to Local Governments FY11-FY15

	FY11	FY12	FY13	FY14	FY15
Projects Funded	8	3	6	2	2, +1 increase
Water Pollution Control Funds (State)	\$3,014,796	\$525,000	\$7,683,817	\$137,500	\$1,283,892
Water Pollution Control Funds (Federal)	\$15,073,979	\$2,625,000	\$38,419,090	\$687,500	\$6,419,458
Water Pollution Control Funds (Total)	\$18,088,775	\$3,150,000	\$46,102,907	\$825,000	\$7,703,350
21st Century Wastewater Fund*	\$0	\$150,000	\$0	\$0	\$1,468,000

Source: DNREC Financial Assistance Branch

* State Funds

Public Safety

Paramedic Program

The state currently provides 30 percent of the funding that the counties use to provide their jurisdictions with paramedic service. In the first three quarters of FY15, the state provided \$7,574,0666 in funding to the counties to support the paramedic program. The fourth quarter spending for this program was not available at the time of publication, so the actual total will be higher in FY15.

Table B.6 State Paramedic Program Funding FY11-FY15

	FY11**	FY12**	FY13**	FY14**	FY15*
State Portion	30%	30%	30%	30%	30%
New Castle County	\$4,047,354	\$4,183,346	\$4,258,254	\$4,581,451	\$3,515,003
Kent County	\$1,320,692	\$1,354,470	\$1,416,538	\$1,432,155	\$1,055,723
Sussex County	\$3,359,573	\$3,568,988	\$3,895,153	\$4,193,621	\$3,003,340
Total	\$8,727,619	\$9,106,804	\$9,569,945	\$10,207,227	\$7,574,066

Source: Delaware Office of Management and Budget

* FY15 reflects three quarters only. Final expenditures were not available at time of publication.

** The totals for FY11-FY14 have been revised by OMB and DHSS to ensure consistency in the data reported.

State Police

From FY11 through FY15, the funding necessary to support the State Police has steadily increased from \$90,898,900 in FY11 to \$112,289,600 in FY15. In addition, the number of personnel employed to meet Delaware's public safety needs has increased from 913 in FY11 to 961 in FY15 (total employees include both troopers and related support staff).

In FY12 through FY14, funds were appropriated for the purpose of replacing the Delaware State Police Troop 3 facility in Camden and Troop 7 facility in Lewes. Both facilities are overcrowded and have significant maintenance and renovation needs. Of the \$16,399,200 estimated total cost for new Troop 3 facility, \$1,860,000 was appropriated for programming, land acquisition, and design. Construction began in the spring of 2014 and is on schedule to be completed this fall. Regarding the new Troop 7 facility, \$150,000 of the \$13,500,000 estimated total cost was appropriated for a study. Additional funds were appropriated in FY14 for the new Troop 7 facility. Land acquisition for the new Troop 7 facility was completed in May of 2015 and construction is anticipated to begin in FY17.

Table B.7 State Police Personnel and Budget FY11-FY15

	FY11	FY12	FY13	FY14	FY15
Total Employees*	913	947	954	960	961
Budget** (thousands)	\$90,898.9	\$97,309.8	\$102,277.6	\$110,557.6	\$112,289.6

Source: Delaware Office of Management and Budget

* Includes both troopers and civilian staff

** State Police budget reported is General Fund only and excludes the Closed State Police Pension Plan. All fiscal years have been adjusted downward to exclude the Closed State Police Pension Plan.

Agriculture

Farmland Preservation

Delaware has one of the best-regarded and most productive farmland preservation programs in the nation. Administered by the Department of Agriculture, farmers and other landowners sell easements to their land to the state, which essentially extinguishes their right to develop the land, but continues to allow a wide range of agricultural uses. In the past five fiscal years, the program has preserved 244 farms, totaling just over 23,300 acres. This has been accomplished using a combination of federal, state, and local funds.

In FY15 the program preserved 13 farms comprising 1,066 acres. The cost per acre of farmland easement has decreased significantly, from a peak of \$6,634 per acre in FY07 to \$1,346 per acre in FY15. The easement value is partially based on the assessed market value of the land for “highest and best use,” which is usually housing development. This decrease can be attributed to the state of the economy in general, and, more specifically, to the reduced demand for new housing and land-development projects. The result of this situation is that more acres of land can be preserved for each tax dollar in the current market.

Table B.8 Farmland Preservation by Easement FY11-FY15

	FY11	FY12	FY13	FY14	FY15***
Farms Preserved	74	51	63	44	13
Acres Preserved	6,650	5,375	5,768	4,360	1,066
State Funds	\$9,971,073	\$5,068,732	\$5,883,300	\$4,177,000	\$1,288,000
Federal Funds	\$8,971,887	\$4,079,931	\$4,370,600	\$4,169,000	\$0
Local Funds	\$743,947	\$595,714	\$597,147	\$95,526	\$146,432
Legal and Survey*	\$317,131	\$190,158	\$230,000	\$175,000	\$41,200
Total Funds	\$20,004,038	\$9,935,016	\$11,081,047	\$8,616,526	\$1,475,632
Cost per Acre**	\$2,960	\$1,813	\$1,881	\$1,936	\$1,346

Source: Delaware Department of Agriculture

* State Funds

** Cost per acre paid to land owner excludes legal and survey costs.

*** FY15 totals are estimates because only 7 of the 13 settlements have occurred as of publication



Young Farmers Loan Program

The Young Farmers Loan Program was established in FY12 by the Department of Agriculture to help individuals acquire farmland. Applicants who meet the criteria for the program (age 18 to 40, net worth not exceeding \$300,000, and at least 3 years of farming experience) can apply for a loan to help purchase a farm (the property must have at least 15 acres of cropland). If approved, an applicant can receive a 30-year, no interest loan for up to 70 percent (not to exceed \$500,000) of the appraised value of the property's development rights. The applicant has to secure the funding for the remainder of the purchase price through a private lender (bank, Farm Credit, etc.). The loan with the private lender is their primary loan and is paid first. Once their primary loan is paid, then the applicant pays the Young Farmer loan up to a maximum of 30 years. For example, if their private loan is 20 years, then they have 10 years to pay the Young Farmer loan. The property is placed into a permanent conservation easement at settlement, and the applicant must actively farm the property for the life of the Young Farmer loan.

In the program's inaugural year in FY12, a total of 10 farms comprising 889 acres were preserved. The program's scope increased in FY13 to 12 farms totaling 1,153 acres. In FY14 there were 3 additional farms preserved representing 171 acres. The program was not funded in FY15.

Table B.9 Young Farmer's Program FY12-FY15

	FY12	FY13	FY14	FY15
Farms Preserved	10	12	3	Not Funded
Acres Preserved	889	1,153	171	0
State Funds	\$2,572,293	\$3,012,534	\$448,584	0
Legal and Survey*	\$52,425	\$66,769	\$18,532	0
Total Funds	\$2,624,718	\$3,079,303	\$467,116	0
Cost per Acre**	\$2,893	\$2,635	\$2,623	0

Source: Delaware Department of Agriculture

* State Funds

** Cost per acre paid to landowner excludes legal and survey costs

Forestland Preservation

The Forest Preservation Program was initiated in FY10 by the Department of Agriculture. In that year there were nine forest tracts preserved totaling 872 acres. The funding for these easements included state funding combined with funding from The Nature Conservancy, a private conservation organization. Although the program is still in place, it has been inactive since FY10.

Table B.10 Forest Preservation by Easement FY10

Forest Tracts Preserved	9
Acres Preserved	872
State Funds	\$1,038,400
Federal Funds	N/A
Local Funds	N/A
Private Conservation Funds	\$412,403
Legal & Survey*	\$49,428
Total Funds	\$1,500,231

Source: Delaware Department of Agriculture

* State Funds

Environment

Community Water Quality Improvement Funds

The purpose of the Community Water Quality Improvement Fund Program is to provide a source of financing to enhance water quality in an environmentally sound and cost-effective manner. These funds allow homeowner associations, municipalities, government agencies, nonprofit organizations, and estuary programs to obtain financing for the implementation of Nonpoint Source (NPS) initiatives to improve water resources throughout the state.

Table B.11 Community Water Quality Improvement Funds FY11-FY15

State Funds	FY11	FY12	FY13	FY14	FY15
DNREC	\$500,000	\$500,000	\$350,000	\$500,000	\$500,000

Source: DNREC Division of Watershed Stewardship, based on the annual allocation of funds for multi-year projects

Nonpoint Source Program

Nonpoint source (NPS) pollution, unlike pollution from industrial and sewage treatment plants, comes from many diffuse sources. NPS pollution is caused by rainfall or snowmelt moving over and through the ground. As the runoff moves, it picks up and carries away natural and human-made pollutants, finally depositing them into lakes, rivers, wetlands, coastal waters, and even our underground sources of drinking water.

Table B.12 NPS Grant Funding for FY11-FY15

	FY11	FY12	FY13	FY14	FY15
State	\$822,540	\$814,063	\$730,000	\$775,823	\$746,138
Federal	\$1,221,055	\$1,123,000	\$1,085,000	\$1,158,523	\$1,144,706
Total	\$2,043,595	\$1,931,063	\$1,815,000	\$1,934,346	\$1,907,844

Source: DNREC Division of Watershed Stewardship, based on the annual allocation of funds for multi-year projects

The Delaware NPS Program addresses NPS pollution through educational programs, publications, and partnerships with other Delaware organizations. The Delaware NPS Program also administers a competitive grant made possible through Section 319 of the Clean Water Act, providing funding for projects designed to reduce NPS pollution.

Housing

DSHA strives to ensure that every Delawarean has the opportunity for a safe and affordable home located in a suitable living environment. This is accomplished by operating and funding both homeownership and affordable rental housing programs, and through partnering with other government, private, and non-profit entities. In meeting the agency's strategic goal of advancing and sustaining homeownership, DSHA helped 617 homebuyers with more than \$124 million in financing of first, second, and acquisition/rehabilitation loans in FY15. DSHA also continued to preserve homeownership through the rehabilitation of 731 homes to ensure they are safe and habitable.

While the housing crisis has slowed considerably, the Multi-State Mortgage Settlement continues to provide the state with resources to stem the impact of mortgage delinquencies. Delaware Homeowner Relief, an umbrella program created by DSHA and the Department of Justice, supports housing counseling, education and outreach, foreclosure mediation, mortgage fraud investigation and prosecution, emergency mortgage assistance, manufactured housing lot rent as-

sistance, and servicer events. Through this effort, DSHA provided foreclosure prevention and mitigation assistance to 825 families last year.

As rental market demand continues to build, DSHA works diligently to ensure those most in need have access to safe, affordable, and accessible housing. This is accomplished through DSHA's Public Housing units and Housing Choice Vouchers, and through new rental units created through the Low Income Housing Tax Credit Program or the Housing Development Fund. DSHA continues to assist and expand the housing assistance available to highly vulnerable families and individuals by addressing their basic needs for housing in partnership with the ongoing supportive services facilitated by the DHSS. Over the past year, DSHA assisted 731 individuals and families with this housing model through the State Rental Assistance Program (SRAP), the Family Unification Program, and the Housing Opportunities for Persons with Aids program. In addition, DSHA is in the process of expanding SRAP to other populations in need, such as homeless veterans and families with children.

While much of DSHA's work assists in the revitalization of distressed neighborhoods and community development, DSHA has played a key role in accelerating the redevelopment of Delaware's traditional downtowns through the new Downtown Development District (DDD) Grant program. This program leverages significant amounts of private capital by investors in designated downtown areas targeted for revitalization. The DDD Grant funds are also offset by additional incentives provided by local jurisdictions and other partners.

Demand for the program has been strong since its launch in January of 2015. In April of 2015, 16 applications were received for the initial round of grants requesting nearly \$8 million in funding. Thirteen projects were awarded to receive \$5.6 million, which is expected to leverage more than \$114 million in private investment to improve neighborhoods, enhance economic development, and otherwise strengthen quality of life in these districts.

To further bolster revitalization efforts in DDDs and other neighborhoods that are experiencing blight, DSHA received \$2,755,000 from the JPMorgan/Chase Settlement as part of its FY15 appropriation from the General Assembly, to establish the Strong Neighborhoods Revolving Housing Fund (SNRHF) for the acquisition, renovation, and sale of vacant, abandoned, and foreclosed property. The Central Delaware Habitat for Humanity, Interfaith Community Housing of Delaware, the Wilmington Housing Partnership, and New Castle County all received grants. This infusion of partnerships, private investments, and public incentives will make a long-lasting contribution to the economic vitality and community revitalization of Delaware's cities and towns.

Table B.13 DSHA Trends and Indicators FY11-FY15

	FY11	FY12	FY13	FY14	FY15
Homebuyers Assisted	1,177	968	751	653	617
Mortgage Assistance* (millions)	\$158	\$126	\$118	\$86	\$124
Homeownership Rehabilitation	393	458	337	393	731
Rental Units Produced or Preserved	364	344	326	60**	386
DSHA Public Housing & Housing Choice Vouchers Managed	1,413	1,413	1,413	1,413	1,413
Rental Assistance for Special Populations	183	275	355	477	731
Foreclosure Assistance: Loans, Grants, Counseling	1,814	1,666	1,108	1,242	825***
Housing Development Fund > (millions)	\$8.5	\$18	\$8	\$10	\$10
Downtown Development District Grant Program (millions)	-	-	-	-	\$7

Source: Delaware State Housing Authority

* Below-market rate mortgages, down payment, and settlement assistance.

** DSHA's method for tracking funding for rental housing projects changed in FY14. Actual activity did not decrease but is being counted differently. Reported units will rebound in FY15.

*** Number is low due to reporting delays for prevention counseling as of time of report.

> HDF base allocation and Affordable Rental Housing Program (ARHP). Does not include HDF allocated for specific programs.

Appendix C: Demographic Data

The U.S. Census Bureau's latest population estimates indicate that Delaware had 935,614 residents in 2014, an increase of 37,680 or 4.2 percent since the 2010 Census. Among the counties, Kent and Sussex County grew by 6 and 7 percent respectively. The estimates show New Castle County growing by only 2.7 percent, or a bit more than 14,000 new residents.

Table C.1 U.S. Census Population Change, 2010-2014, State of Delaware and Counties

	Population Estimates		Change 2010-2014	
	2010	2014	Number	Percent
Delaware	897,934	935,614	37,680	4.2%
Kent County	162,310	171,987	9,677	6.0%
New Castle County	538,479	552,778	14,299	2.7%
Sussex County	197,145	210,849	13,704	7.0%

Source: US Census Bureau, 2010 Census; US Census Bureau, Population Division, Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2014.

Table C.2 Delaware Population Projections: 2010-2040

	Population Projections		Projected Change 2010-2040	
	2010	2040	Number	Percent
Delaware	899,673	1,068,155	168,482	18.7%
Kent County	162,901	204,465	41,564	26.0%
New Castle County	538,843	606,477	67,634	12.6%
Sussex County	197,929	257,213	59,284	30.0%

Source: Delaware Population Consortium, Release Date: October 2014.

According to the Delaware Population Consortium, Delaware's population is projected to grow by more than 168,000 between 2010 and 2040, an increase of 18.7 percent, reaching a projected population of just under 1.1 million. Sussex County is expected to see the largest percent increase in population by 30 percent. Kent County's population is projected to reach 204,465 by 2040, an increase of 26 percent. New Castle County is expected to grow by 12.6 percent over the same period, adding 67,634 to reach a 2040 population of 606,477.

Appendix D: Comprehensive-planning Progress

Since September 2014, the Governor has certified one comprehensive plan, which was for the Town of Newport. In addition, this office is currently working with 3 towns who have plans nearing the end of their update that are either being reviewed for certification or will begin their certification review in the next several months. The Town of Kenton is currently writing their first comprehensive plan.

The OSPC worked with 3 towns to complete their 5-year reviews during this planning period. An additional 13 towns have updates underway and this office will be working with approximately 14 towns within the next year as they begin their comprehensive plan reviews and/or updates.

The following table shows the current status of all municipal comprehensive plans. Municipalities that are currently known to be updating or amending their comprehensive plans are noted to be “in progress.” There are three municipalities in New Castle County that do not have plans because they have ceded control of planning and zoning to the county. In addition, there are three very small municipalities in Kent County that do not have plans due to the lack of capacity and resources to develop them.

Table D.1 Municipal and County Comprehensive Plan Activity 2008-2015 YTD

Municipality	County	Latest Planning Activity	Certified
Bowers Beach	Kent		05/15/2009
Camden	Kent	Amended 2015	05/05/2008
Cheswold	Kent	Update In Progress	12/18/2010
Clayton	Kent	Amendment 2015/Downtown Development District Plan	12/08/2008
Dover	Kent	Amended 2015/Downtown Development District Plan	02/09/2009
Farmington	Kent	Update in Progress	11/17/2004
Felton	Kent	No activity	11/10/2008
Frederica	Kent	Update in Progress	03/17/2004
Harrington	Kent	No activity	12/16/2013
Hartly	Kent	No activity	
Houston	Kent	No activity	07/12/2007
Kenton	Kent	Comp Plan in Progress	
Leipsic	Kent	Update in Progress	11/06/2006
Little Creek	Kent	Update in Progress	08/07/2006
Magnolia	Kent	No activity	03/16/2009
Viola	Kent	Update in Progress	03/17/2004
Woodside	Kent	No activity	
Wyoming	Kent	No activity	05/02/2011
Milford	Kent/Sussex	Amended 2015/Downtown Development District Plan	01/26/2009
Smyrna	Kent/New Castle	Downtown Development District Plan	2/04/2013
Arden	New Castle	Under County Control	n/a
Ardencroft	New Castle	Under County Control	n/a
Ardentown	New Castle	Under County Control	n/a
Bellefonte	New Castle	Reviewed 2014/Amended 2015	08/13/2007

Municipality	County	Latest Planning Activity	Certified
Delaware City	New Castle	Amended 2015/Master plan in Progress	11/24/2008
Elsmere	New Castle	No activity	08/12/2010
Middletown	New Castle	Downtown Development District Plan	09/10/2012
Newark	New Castle	Plan update in progress/Downtown Development District Plan	10/27/2008
New Castle	New Castle	NBBF Grant received for DDD planning	07/21/2009
Newport	New Castle	Certified 2014	12/18/2014
Odessa	New Castle	No activity	10/01/2012
Townsend	New Castle	No activity	07/07/2010
Wilmington	New Castle	Downtown Development District Plan	09/28/2010
Bethany Beach	Sussex	No activity	2/17/2012
Bethel	Sussex	Reviewed 2014	07/08/2008
Blades	Sussex	No activity	04/17/2008
Bridgeville	Sussex	Update in Progress	09/11/2006
Dagsboro	Sussex	Reviewed 2015	04/27/2009
Delmar	Sussex	No activity	10/25/2010
Dewey Beach	Sussex	Amended 2015	07/29/2007
Ellendale	Sussex	No activity	10/06/2009
Fenwick Island	Sussex	Update in progress	10/16/2007
Frankford	Sussex	No activity	09/08/2008
Georgetown	Sussex	Amended 2015/Review for update in progress	01/13/2010
Greenwood	Sussex	No activity	01/08/2008
Henlopen Acres	Sussex	Update in Progress	07/09/2004
Laurel	Sussex	No activity	6/20/2011
Lewes	Sussex	Update in Progress	10/19/2005
Millsboro	Sussex	No activity	06/01/2009
Millville	Sussex	No activity	02/10/2009
Milton	Sussex	Update in progress	05/03/2010
Ocean View	Sussex	No activity	07/13/2010
Rehoboth	Sussex	Review in progress	07/23/2010
Seaford	Sussex	Downtown Development District Plan	01/12/2010
Selbyville	Sussex	No activity	08/06/2007
Slaughter Beach	Sussex	Reviewed 2014	01/14/2008
South Bethany	Sussex	Update in Progress	07/14/2006

Appendix E: Highlights from Local Jurisdiction Annual Reports

In order to make the most of the annual reports that municipal and county governments are required to submit to the Office of State Planning Coordination (OSPC), we have added a new section to this report that highlights accomplishments and issues with local government as noted in their reports. We feel this will help the state to maintain and strengthen the partnership approach to land-use planning we have been nurturing over the years.

As of September 1, 2015, 38 local jurisdictions have submitted an annual report. After reviewing the reports, it is noted that most of the municipalities and all of the counties are working to implement the goals and objectives set forth in their comprehensive plans. Of those jurisdictions reporting, fourteen municipalities are working with the OSPC to update their comprehensive plans, three have completed a 5-year review, twelve have completed updates or are working to update their zoning code, nine are working on or considering bike and/or pedestrian walkway plans or trails, and three are working to create a master plan or continue to move forward with a recently adopted master plan.

In addition, seven local jurisdictions have noted that amendments to their comprehensive plans are needed and nine local jurisdictions have identified issues that they feel will require technical assistance from the OSPC.

Many municipalities noted they could better implement and update their current plans if the planning grant program was still available through the state.

New Castle County

Bellefonte	Celebrated 100th birthday! Currently moving forward to annex 4 properties to smooth out town boundaries.
Delaware City	Branch Canal Trail opened. The American Birding Association headquarters is now located in Delaware City. The town continues to work on the Fort DuPont redevelopment plan.
Elsmere	Greenway trail is underway with an expected completion date within the next 12 months.
Middletown	The town has completed a walkability study and determined that the infrastructure is holding up well. A few corrective actions were taken to ensure the walkable landscape remains usable by residents. Economic development continues to be steady within the town.
City of New Castle	The city adopted a mixed-use downtown gateway zoning for the former industrial land.
Townsend	The town installed exercise stations in the municipal park. The town continues to look at their comprehensive plan and make amendments necessary to attract new residences and economic activities.

Kent County

Bowers Beach	The town is working to become a destination for ecotourism through the Delaware Bayshore Initiative. The town continues to coordinate with the state regarding new jetty walls and beach replenishment.
Camden	Economic development activity continues along Route 13 in Camden. The town is currently working on a comprehensive rezoning to bring it into compliance with their comprehensive plan.
Clayton	The town adopted a new sourcewater protection ordinance in 2015. In addition, the town verified their boundaries and recorded the municipal boundary map. The town continues to support infill development and economic development of their downtown area. In 2015 the town applied to be a Downtown Development District.
Dover	The city is working on a draft bicycle plan and a draft pedestrian plan and the construction of the Capital Trail continues. This year the first section of the trail was completed. The city continues to support the development of their downtown area and in 2015 they applied and was approved to be a Downtown Development District.
Farmington	The town paved two streets this year and has begun using electronic speed signs to help slow traffic.
Felton	The town is working to connect sidewalks to create a pedestrian system through the town.
Frederica	The town is working to update their comprehensive plan. As part of this process, they are working with state agencies and the University of Delaware to address sea level rise and resiliency in their comprehensive plan.
Harrington	The town has created a new zoning code and their comprehensive rezoning is nearing completion. They continue to experience development of single-family homes and have noted that a few national chains have expressed interest in their town.
Leipsic	The town is working on a comprehensive plan update. In addition, the town is exploring the possibility of creating a waterman's museum.
Magnolia	The town is working to upgrade the ordinances to pursue abandoned property owners.
Milford	The town continues to implement the Southeast Milford Master Plan. They are working to amend/update their comprehensive plan in anticipation for the growth outlined in the master plan, including the Bayhealth Medical campus. The town remains committed to the riverfront area and applied for a Downtown Development District designation.
Smyrna	The town adopted a North Corridor Zoning District and a South Corridor Zoning District as part of the implantation of their plan. In addition, the town continues to redevelop the downtown area and continues to be interested in becoming a Downtown Development District.

Sussex County

Sussex County	The county continues to promote affordable housing and continues to increase the availability of sewer to county residents. They have redrafted their flood provisions within the zoning code.
Blades	The town is currently coordinating with the state regarding two annexations.
Bridgeville	The town approved a master plan for the Bridgeville/Greenwood area in 2014. They are currently working on reviewing their plan in preparation of their next update. They are working on a sourcewater protection ordinance and they have partnered with DEDO for a vision for their downtown area.
Dagsboro	The town has begun a sidewalk inventory and is working to improve the downtown park. The town has received money through the Neighborhood Building Blocks fund for the development of a Downtown Development District plan/application.
Delmar	The town continues to work on ways to improve their downtown area by expanding their streetscape project to include decorative lighting. They have received a grant through the Neighborhood Building Blocks fund to update their comprehensive plan, which will include plans for a Downtown Development District.
Dewey Beach	The town has adopted a floodplain ordinance to be FEMA compliant and to help reduce cost to the residents. They have noted continued success of flood mitigation, stormwater runoff, and bay access in the Bayard Avenue area.
Fenwick Island	The town is currently in the process of updating their comprehensive plan and zoning ordinances.
Frankford	The town has adopted a new floodplain ordinance. In addition, the town is working on a stormwater inventory, drainage issues, and identified improvements to the town park.
Georgetown	The town adopted the second phase of the Transition Housing Task Force Report this year. In addition, the town received a grant to create a Downtown Development District plan and will be updating their comprehensive plan beginning this year.
Greenwood	The town continues to try to guide growth to fiscally and environmentally sound areas.
Henlopen Acres	The town has met with state agencies on several occasions regarding the update of their comprehensive plan. The state is working with the town to resolve the Rehoboth Art League non-conforming use issue before certification.
Laurel	The town has received a grant through the Neighborhood Building Blocks fund to update their comprehensive plan. The new plan will include their plans for a Downtown Development District and a riverwalk.
Lewes	The town is currently updating their comprehensive plan. They have also noted that Canal Front Park continues to grow for public activities and the town is working to address parking issues in the downtown area. In addition, the town has hired a professional planner.
Millsboro	The town continues to experience commercial growth. They are currently working on street improvements in the downtown area and they have coordinated with DEDO and the “pop up” program.
Millville	The town is expanding their cultural events to promote a sense of community. They continue to experience growth and have adopted performance-based development standards for a master planned community.
Ocean View	The town is reviewing two residential planned communities. They are hoping that the commercial with the residential area will help alleviate traffic on Route 26. Public water is now available to all residents of the town.
Selbyville	The town has secured a fiber optics business within their industrial park, which should bring approximately 250 jobs to the area.
South Bethany	The town has created a Sea Level Rise and Storm Surge committee. They have received several grants to help them plan for environmental mitigation and sustainability and for public safety.

Acknowledgements

Jack A. Markell Governor

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