

Cabinet Committee on State Planning Issues



November 10, 2025

Agenda

- I. Approval of October 13, 2025, meeting minutes
- II. 2025 Strategies for State Policies and Spending
- III. Public Comment



2025 Strategies for State Policies and Spending





DELAWARE STATE STRATEGIES

Smart Growth:

Efficient Spending.

Affordable Housing.

Climate Resiliency.

Land Conservation.

Economic Development.

Progress Update

- Held 3 public workshops and received over 80 public comments during the public comment period.
- OSPC addressed all comments and is prepared to publish a response document, refined the data, and revised the maps and policy document.
- Several themes emerged from feedback received. Summarized in a memo and will present those themes today.
- Produced 2 new maps to support Strategies implementation.
- Completed a Residential Capacity Analysis to ensure adequate land exists within Levels 1-3.



Theme #1

What the State Strategies is and is not

- Numerous comments that encouraged changes to the data and mapping methodology intended to identify new “growth areas.”
- Local government comprehensive plans identify land-use and growth priorities for a jurisdiction, with significant community engagement.
- State Strategies is not a comprehensive plan; prioritizes State investments into areas that are consistent with local government plans; does not intend to identify new growth areas that are inconsistent with those plans.
- **Action:** Investment Levels 1-3 limited to local government comprehensive plan growth areas in all counties.



Theme #2

Economic Development

- Some are concerned that State Strategies does not include enough land in Investment Levels 1-3 for anticipated development.
- **Action:** Completed a Residential Capacity Assessment that shows there is sufficient land within Levels 1-3 to accommodate future demand multiple times on vacant land. And there are significant opportunities for redevelopment in all three counties.
- **Action:** Produced the Key Planning Areas map.
 - Overlays existing TIDs and DDDs on the Investment Levels.
 - Identifies 2 new Corridor Planning Areas in Sussex for the state to collaborate with the county on master plans linking land-use, transportation, and other agency priorities.



Theme #3

Environment/Sustainability/Resiliency

- Some are concerned that the Strategies do not adequately reflect environmental and climate vulnerability data, such as vulnerable floodplain and coastal areas identified as Investment Levels 1 and 2.
- Others feel that the Strategies analysis includes too much environmental data and are concerned it unfairly limits the amount of land in Levels 1-3.
- **Action:** The Delaware Ecological Network (DEN) dataset was created in 2012. The DEN dataset was refined to remove lands developed between 2012 and 2022, reflecting a more accurate current inventory of natural resources.



Theme #3 (cont.)

Environment/Sustainability/Resiliency (cont.)

- **Action:** Produced the Ecological Lands of Significance map
 - Overlays the DEN and coastal hazards data on the Investment Levels.
 - Demonstrates the areas of ecological contiguity that are important to preserve and protect, as well as how the Investment Levels interact with coastal vulnerabilities.
- **Action:** Refined the “Out of Play” layer to remove parcels no longer permanently protected based on local government and public input.



Theme #4

Location-Specific Requests or Comments

- Many comments were received about specific parcels, often questioning the data, suggesting or requesting a different Investment Level, or supporting the Investment Levels shown on the draft map.
- **Action:** All specific parcels were reviewed to ensure we had accurate data. The data was updated where actionable information was provided, and the results are reflected in the final version of the analysis.



Theme #5

Private Sewer (in Sussex)

- Some asked OSPC to use private wastewater infrastructure data in Sussex. Sewer infrastructure should be phased with comprehensive plan growth areas to guide growth and prevent rural sprawl. Therefore, the State does not support private wastewater infrastructure located outside of comp plan growth areas. Sussex is the only county that permits this type of infrastructure.
- **Action:** OSPC met with Artesian Water to discuss their sewer infrastructure in Sussex and their future plans. Artesian agreed to work with the State and Sussex in a collaborative manner moving forward on how best to leverage Artesian's infrastructure to support mutually agreed upon growth plans in Sussex. However, Artesian has not released their sewer data to OSPC due to proprietary business information and data security concerns.
- **Next Step:** The State, Sussex County, and Artesian should work together to evaluate the role of private wastewater infrastructure in the context of the upcoming Sussex County comp plan update.



Theme #6

Sussex County Government Comments

- Sussex County provided many helpful comments about specific data sets. We have addressed as many as possible. Examples include:
 - Increase the buffer around libraries from 1 mile to 3 miles, since they serve such an important educational and community function. OSPC conducted additional research and applied the increased buffer statewide.
 - Identified missing or mis-located fire and EMS stations. Fire station and EMS data was reviewed and updated to ensure accuracy statewide.
 - Add some additional hospital facilities. After reviewing the hospital data with DHSS, data was revised to add the Bayhealth free standing Emergency Room facility located at Rt. 9 and Hudson Road.



Theme #7

Transportation Data

- Some suggested that DelDOT Capital Transportation Program (CTP) projects should be considered “growth factors” and be used in the State Strategies analysis. Their reasoning is that if DelDOT is investing in a road improvement, it should allow more intense development of lands nearby due to the improved road capacity.
- DelDOT’s response is that CTP projects have many purposes, including safety, capacity, regional travel, maintenance and repair, etc. and are not necessarily constructed to encourage additional growth. No action was taken.



Theme #8

Other Comments

- Other comments were received that do not fit into any of the preceding categories. Many represent perspectives about land-use, planning, the environment or growth that do not fit within the scope of the State Strategies or are more appropriately directed to local governments.
- Even so, these comments are valuable insights from stakeholders. All comments are included, and we encourage CCSPI members to review them.

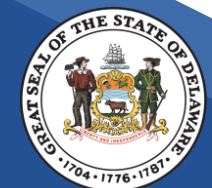
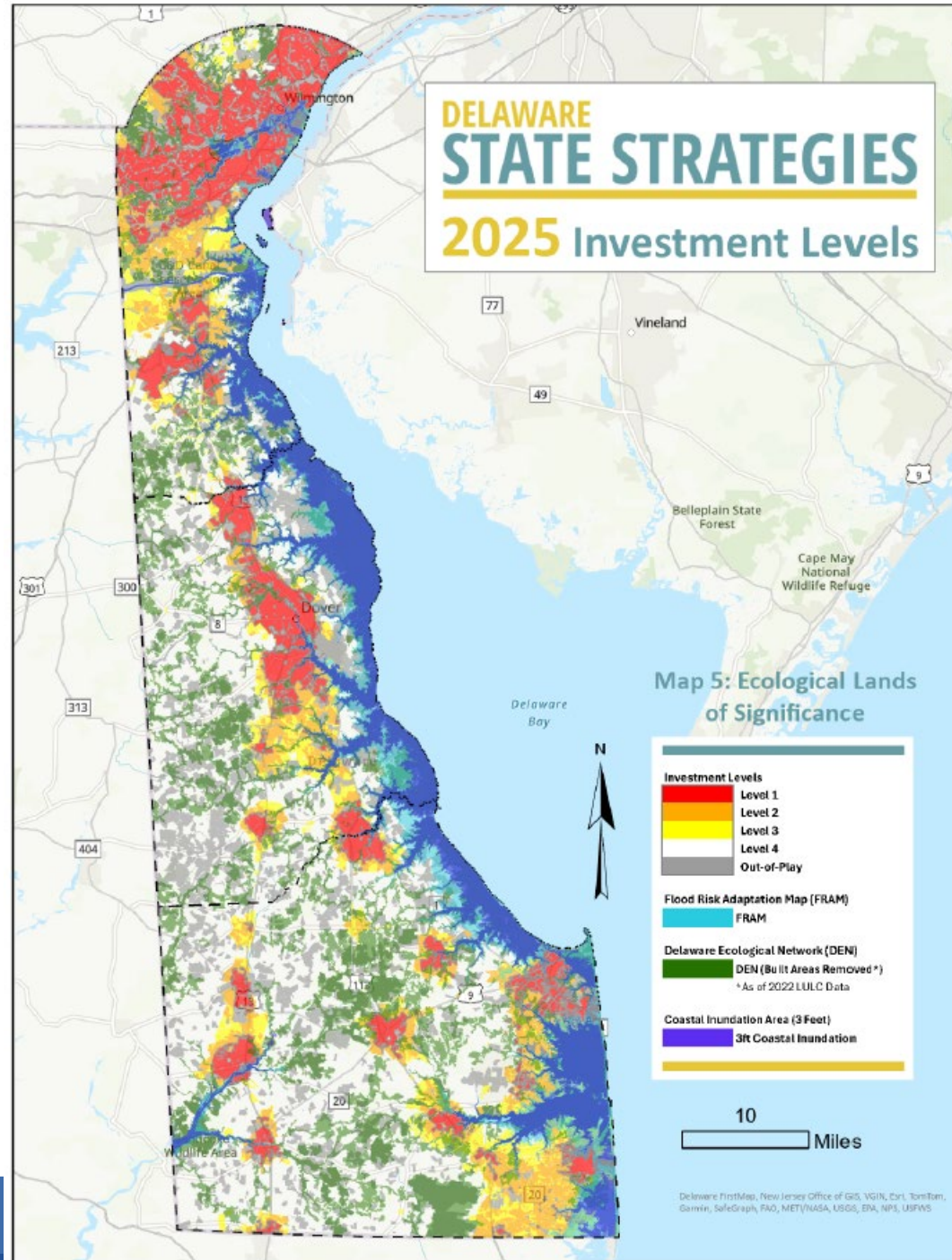


Ecological Lands of Significance Map

- It is imperative that future growth occurs in harmony with the environment and utilizes existing land capacity.
- The map displays key environmental data layers and demonstrates their relationship to each other and potential growth areas.
- The map layers are already reflected in the Investment Levels, since they were present in the analysis data. Their presence on this map does not have an additional impact on the Investment Levels themselves.
- Functions as an overlay to aid in decision-making.



DELAWARE STATE STRATEGIES 2025 Investment Levels



Strategies Insights

Key Planning Areas Map

- The map displays existing DDDs, existing TIDs, and TIDs under development.
- It also designates two Corridor Planning Areas that require further study because they will continue to experience intense development pressure despite the current data showing them as predominately Levels 3 and 4.
 - The US Route 9 Corridor from Georgetown to the Five Points intersection
 - The US 113 Corridor from Georgetown to Millsboro
 - A call-to-action for state and local representatives to collaborate on long-term plans to ensure future development is anticipated and coordinated with the provision of infrastructure.



Strategies Insights

Key Planning Areas Map (cont.)

- The designation of these corridor areas will not change the 2025 Investment Levels of the underlying land in the near-term. If/when the proposed master plans are adopted and certified as comprehensive plan amendments, the future Investment Levels of the underlying land could change.
- Existing studies, such as the Coastal Corridors Study, and other proposed transportation solutions alone are insufficient to protect the vital corridors and prevent future development from overwhelming the surrounding areas. Land-use solutions are needed.



Strategies Insights

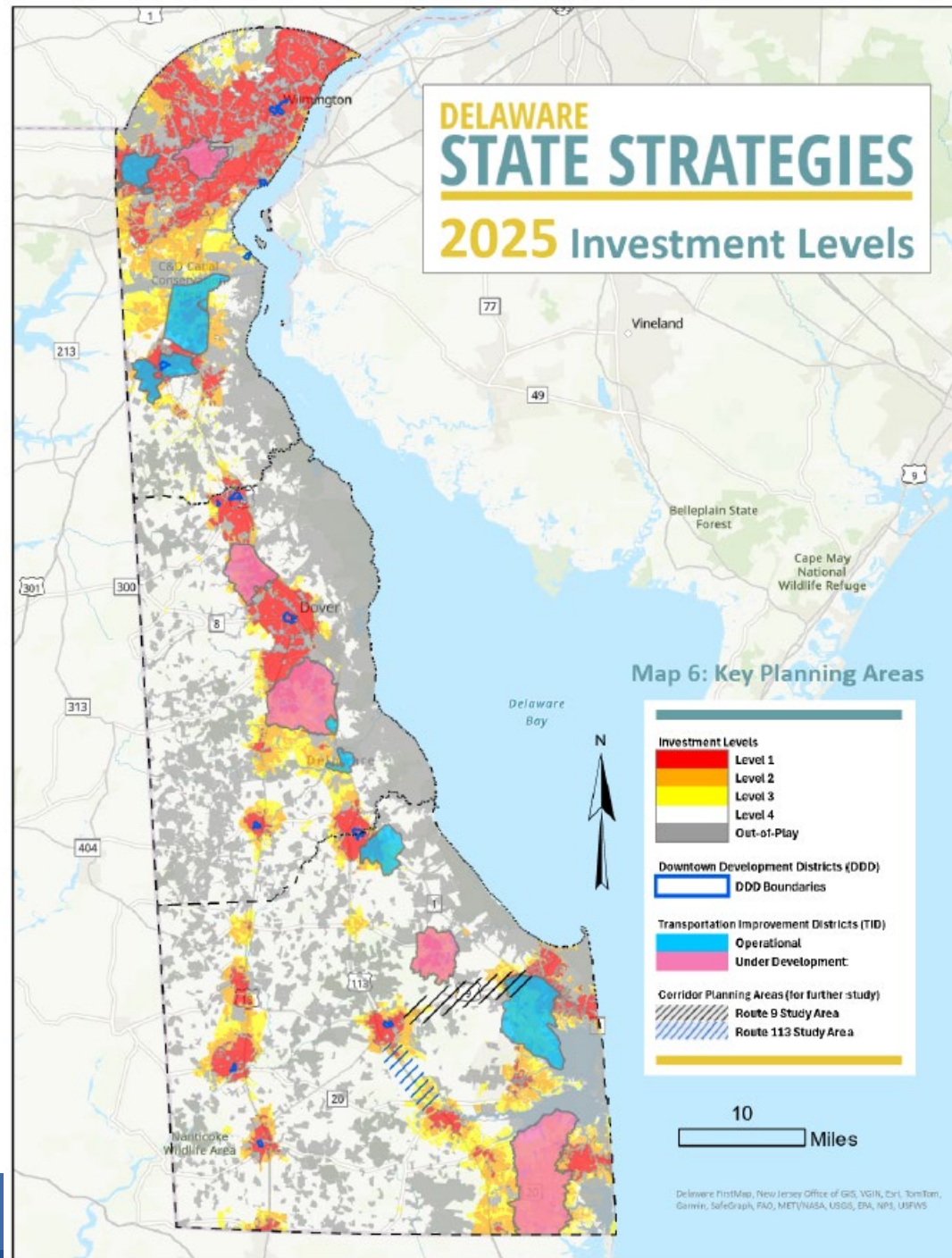
Key Planning Areas Map (cont.)

Goals include, but are not limited to:

- Coordinate master plans with the Sussex County Comprehensive Plan.
- Reach consensus on what density means for these areas.
- Generate land-use forecasts and scenarios to gauge the infrastructure impacts.
- Coordinate forecasts with existing and proposed TIDs.
- Create sufficient incentives to ensure that demand remains inside planned areas.
- Evaluate land reservation and preservation strategies.
- Ensure that future transportation improvements do not create induced demand and increase development pressure.



DELAWARE STATE STRATEGIES 2025 Investment Levels



DELAWARE STATE STRATEGIES 2025 Investment Levels

Key Planning Areas: Sussex County

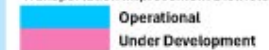
Investment Levels



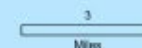
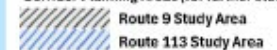
Downtown Development Districts (DDD)



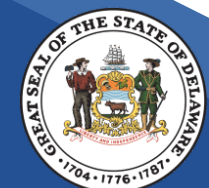
Transportation Improvement Districts (TID)



Corridor Planning Areas (for further study)



Delaware: PivotalMap, WGS, Esri, TomTom, Garmin, SafeGraph, GeoTechnologies, Inc. METU
NASA, USGS, FEMA, NPS, NOAA, USFWS



Residential Capacity Analysis

Overview

As a complement to Strategies for State Policies and Spending and the Investment Level maps, a gross land area analysis was done to ensure demand could be met within Investment Levels 1-3 only. To run this level of analysis three key data components were utilized.

1. DRAFT State Strategies Investment Level maps.
2. 2022 Land Use Land Cover (LULC)
3. Countywide Demand Forecasts

DELAWARE
STATE STRATEGIES



Residential Capacity Analysis

LULC Relationship

The first step in this the process is to quantify the 53 land use categories into one simplified category. Lands appearing in the 2022 LULC data were assigned to one of the following categories.

1. Built – Lands that are already developed.
2. Buildable – Lands assumed are buildable or “Green fields”.
3. Residential – Lands that are built for the purposes of housing.
4. Other – Lands that are excluded from the analysis entirely as they represent areas that are not generally used for building per standards, policy, ordinance or other means.



Residential Capacity Analysis

Factors Calculations

Once these four categories are established a series of GIS analysis are run to generate the following components.

1. Built acres by Investment Level
2. Buildable acres by Investment Level
3. Residential/Urban acres by Investment Level
4. Residential Percent (“Residential/Urban acres”/ (“Residential/Urban acres” + Built acres)).



Residential Capacity (DPC)

Full table output

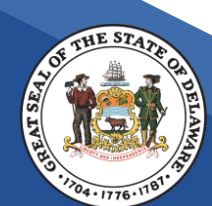
Residential Capacity Analysis By Investment Level (DPC 2024 projections 2025-2045)														
Land Area (Acres)					Factors	Buildable Acres 2022		Ratio Available to Needed						
County	Investment Level	Total Built (TB)	Residential (R)	Built (B)	Residential % (R%) = (R/(R+B))	2022 LULC Buildable - (BA)	Household (HA) = (R%*BA)	Projected Households (PH)	2 Units / Acre = HA/(PH/2)	3 Units / Acre = HA/(PH/3)	4 Units / Acre = HA/(PH/4)	5 Units / Acre = HA/(PH/5)	6 Units / Acre = HA/(PH/6)	7 Units / Acre = HA/(PH/7)
New Castle	1	77,600	51,157	26,444	65.92%	10,287	6,781		4.26	6.40	8.53	10.66	12.79	14.93
New Castle	2	19,971	14,602	5,368	73.12%	9,479	6,931		4.36	6.54	8.72	10.90	13.08	15.26
New Castle	3	9,523	6,811	2,712	71.52%	6,142	4,393		2.76	4.14	5.53	6.91	8.29	9.67
New Castle Total	N/A	107,094	72,570	34,524	N/A	25,908	18,105	3,180	11.39	17.08	22.77	28.47	34.16	39.85
Kent	1	26,139	17,188	8,951	65.76%	7,494	4,928		1.02	1.53	2.05	2.56	3.07	3.58
Kent	2	7,640	5,912	1,728	77.38%	11,843	9,165		1.90	2.85	3.81	4.76	5.71	6.66
Kent	3	3,774	2,681	1,093	71.03%	9,409	6,683		1.39	2.08	2.77	3.47	4.16	4.86
Kent Total	N/A	37,554	25,781	11,772	N/A	28,746	20,775	9,634	4.31	6.47	8.63	10.78	12.94	15.10
Sussex	1	32,012	22,525	9,487	70.36%	10,082	7,094		0.70	1.05	1.40	1.75	2.10	2.45
Sussex	2	24,005	17,002	7,003	70.83%	32,469	22,997		2.27	3.41	4.54	5.68	6.81	7.95
Sussex	3	10,171	7,221	2,949	71.00%	20,750	14,733		1.46	2.18	2.91	3.64	4.37	5.09
Sussex Total	N/A	66,188	46,749	19,439	N/A	63,301	44,824	20,247	4.43	6.64	8.86	11.07	13.28	15.50



Residential Capacity (Housing Needs)

Full table output

Residential Capacity Analysis By Investment Level (Housing Needs Assessment 2030)														
Land Area (Acres)					Factors	Buildable Acres 2022		Ratio Available to Needed						
County	Investment Level	Total Built (TB)	Residential (R)	Built (B)	Residential % (R%) = (R/(R+B))	2022 LULC Buildable - (BA)	Household (HA) = (R%*BA)	Projected Households (PH)	2 Units / Acre = HA/(PH/2)	3 Units / Acre = HA/(PH/3)	4 Units / Acre = HA/(PH/4)	5 Units / Acre = HA/(PH/5)	6 Units / Acre = HA/(PH/6)	7 Units / Acre = HA/(PH/7)
New Castle	1	77,600	51,157	26,444	65.92%	10,287	6,781		3.38	5.07	6.75	8.44	10.13	11.82
New Castle	2	19,971	14,602	5,368	73.12%	9,479	6,931		3.45	5.18	6.90	8.63	10.35	12.08
New Castle	3	9,523	6,811	2,712	71.52%	6,142	4,393		2.19	3.28	4.38	5.47	6.56	7.66
New Castle Total	N/A	107,094	72,570	34,524	N/A	25,908	18,105	4,016	9.02	13.52	18.03	22.54	27.05	31.56
Kent	1	26,139	17,188	8,951	65.76%	7,494	4,928		1.42	2.13	2.84	3.55	4.26	4.97
Kent	2	7,640	5,912	1,728	77.38%	11,843	9,165		2.64	3.96	5.28	6.60	7.92	9.24
Kent	3	3,774	2,681	1,093	71.03%	9,409	6,683		1.93	2.89	3.85	4.81	5.78	6.74
Kent Total	N/A	37,554	25,781	11,772	N/A	28,746	20,775	6,941	5.99	8.98	11.97	14.97	17.96	20.95
Sussex	1	32,012	22,525	9,487	70.36%	10,082	7,094		1.06	1.59	2.12	2.65	3.18	3.71
Sussex	2	24,005	17,002	7,003	70.83%	32,469	22,997		3.43	5.15	6.87	8.59	10.30	12.02
Sussex	3	10,171	7,221	2,949	71.00%	20,750	14,733		2.20	3.30	4.40	5.50	6.60	7.70
Sussex Total	N/A	66,188	46,749	19,439	N/A	63,301	44,824	13,392	6.69	10.04	13.39	16.74	20.08	23.43



Residential Capacity Analysis

Concluding Points

- The findings of both Residential Capacity tables based on the DRAFT Investment Level areas for 1, 2 and 3 indicate there is sufficient land to accommodate the anticipated growth
- The lowest land to demand ratio appears in the “Residential Capacity Analysis By Investment Level (DPC 2024 projections 2025-2045)” table for 2 Units/Acre in Kent County DE with 4.31 times the available, Buildable land in levels 1, 2, and 3.
- The figures are based on greenfield development. Redevelopment and infill would add significantly more capacity in Levels 1, 2, and 3.



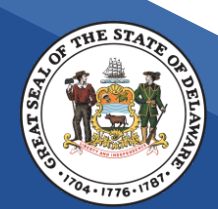
Infill and Redevelopment

USGS Land-Use Change Model.

- **New Castle County**
 - 60.8% infill/redevelopment & 39.2% greenfield development
- **Kent County**
 - 30.5% infill/redevelopment & 69.5% greenfield development
- **Sussex County**
 - 33.6% infill/redevelopment & 66.4% greenfield development



Strategies Update Timeline



Public Comment

