



Cabinet Committee on State Planning Issues

Data Analysis Workgroup

Report 1: Building Collaborative Perspectives on Growth and Development Workshops

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In collaboration with:



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The Building Collaborative Perspectives on Growth and Development Workshops and this report were conducted in collaboration with the Cabinet Committee on State Planning Issues, Office of State Planning Coordination, the Office of the Governor, the Delaware Department of Transportation (DelDOT), Delaware Population Consortium, the Delaware Department of Agriculture, the Delaware State Housing Authority, and the University of Delaware's Institute for Public Administration. This report was prepared by DelDOT and Whitman, Requardt & Associates, LLP.

1 Introduction

1.1 ABOUT THIS REPORT

The purpose of this report is to summarize and synthesize a series of three stakeholder workshops held during Fall 2024, one with each of Delaware's counties. The workshops, titled "Building Collaborative Perspectives on Growth and Development," were hosted by the [Data Analysis Workgroup \(Workgroup\)](#) of the Cabinet Committee on State Planning Issues (Cabinet Committee) to initiate detailed and comprehensive discussions about land use planning and data in preparation for updating the Strategies for State Policies and Spending (SSPS) document and maps in 2025.

The Workgroup was formed by the Cabinet Committee in August 2024 and includes:

- Chair: Delaware Department of Transportation. Nicole Majeski, former Secretary
- Delaware Department of Agriculture, Delaware Forest Service. Kyle Hoyd, State Forester
- Delaware State Housing Authority. Emily Cunningham, Chief of Staff
- Delaware Population Consortium. Dan Blevins, WILMAPCO, DPC Vice Chair

The Workgroup was tasked with compiling data and conducting analysis of statewide land use, demographic, and infrastructure trends, then presenting that information during the workshops to stakeholders in each county, including local governments, developers, business owners, and housing and environmental interest groups.

The workshops were designed to achieve the following objectives:

- **Build awareness** of current land use, growth trends, and their implications for the future
- **Share data-driven information**, metrics, and analysis
- **Gain common understanding and consensus** about current data sets at state and local government level that could influence state priorities and the SSPS update
- **Collect data and feedback** that will be considered in the 2025 SSPS update
- **Strengthen connections** between stakeholders and state agencies to facilitate further coordination and cooperation

The Cabinet Committee will use the information presented in this report to guide next steps with the SSPS update due in 2025, as well as inform agency work plans and priorities.

Cabinet Committee on State Planning Issues

The Cabinet Committee is responsible for preparing the Strategies for State Policies and Spending (SSPS), which summarizes the State's land use goals, policies and strategies and directs state spending into investment levels that support the most efficient use of state resources. County and municipal governments retain their existing ability to plan for land use via comprehensive plans. The Strategies for State Policies and Spending shall be updated at least every 5 years.

The Cabinet Committee includes:

- The Secretary of Natural Resources and Environmental Control
- The Secretary of Transportation
- The Secretary of Agriculture
- The Director of the Delaware State Housing Authority
- The Secretary of Safety and Homeland Security
- Director of the Office of State Planning Coordination
- Division of Small Business

1.2 SSPS UPDATE PROCESS

The Strategies for State Policies and Spending (SSPS) consists of a document and a map series. The document contains the State's goals and policies for infrastructure investment as developed by the Cabinet Committee. The map series identifies areas of the state as one of four "Strategy Levels" or "Investment Levels" (Figure 1). Both the document and associated maps are a culmination of extensive coordination with local governments, citizens, and state agencies to determine what areas are most prepared for growth and where the state can make the most cost-effective investments in roads, schools, and other public facilities and services.

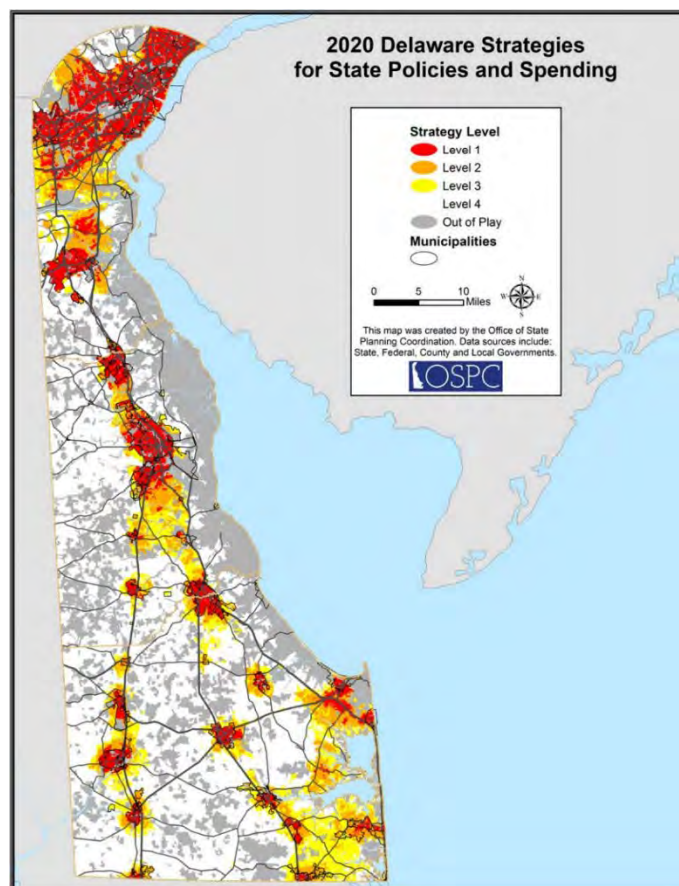
For more about the Strategies for State Policies and Spending (SSPS)

Visit the **SSPS website**

<https://strategies.stateplanning.delaware.gov/> to read the 2020 State Strategies document, explore an interactive map, and view a series of short YouTube videos illustrating how the SSPS is created in collaboration with localities and how the results are used to guide development.

- **Strategy Levels 1–3** are the areas wherein State policies will support growth and economic development activities, with Levels 1 and 2 being the primary focus. In these areas, the State would like to see local government land use policies that promote higher densities and mixed-use type development in appropriate areas such that complete communities can be developed—places where people could live, play, work, and shop. Investment Level 3 reflects areas where growth is anticipated by local, county, and state plans in the longer-term future, or areas that may have environmental or other constraints to development.
- **Strategy Level 4** is where state policies will support agriculture, protection of natural and cultural resources, and open-space activities including the promotion of agriculture industry support activities. In these areas, the State would like to see local government land-use policies that are rural in nature and that support agribusiness activities where appropriate in addition to natural resource protection and restoration.

Figure 1. 2020 Strategies for State Policies and Spending Map



- **Out-of-Play Areas** are lands that are not available for development or for redevelopment. These include publicly owned lands, private conservation lands, lands for which legal constraints on development are identified, and lands in some form of permanent open-space protection (such as Agriculture Preservation, forestry, or open-space conservation easements).

The State Strategies document and map series direct state investments, but they are not a land use plan and do not determine which proposed developments are approved. Delaware's county and municipal governments have the responsibility and authority to plan for and manage land use and to institute zoning and other controls required to implement comprehensive plans. These local governments are therefore essential partners in developing and implementing the State Strategies and ensuring an efficient pattern of land use.

State code requires that the SSPS document and maps be updated every five years so that they reflect current physical, social, and economic conditions. The workshops summarized in this report are one of the early steps in updating the 2020 SSPS, as shown in **Figure 2**. Additional analysis, stakeholder feedback and public engagement are planned to complete the update process. The SSPS update is expected to be completed by the end of 2025.

Figure 2. Update Process for the Strategies for State Policies and Spending



2 Stakeholder Workshops

2.1 LOGISTICS

2.1.1 Format

The stakeholder workshops were held as follows:

- **Kent County:** October 23, 2024, 1 – 4 pm at the DeIDOT Dover Administration Building
- **New Castle County:** November 20, 2024, 1 – 4 pm at the Canal District DeIDOT Administration Building
- **Sussex County:** December 18, 2024, 9 am – 12 pm at the DeIDOT Georgetown Administration Building

The workshops featured the general agenda shown in **Figure 3**, with small adjustments to timing in different workshops. Each workshop featured a presentation from the Workgroup with information about land use, development and growth trends, as well as a presentation from the respective County staff. These presentations are summarized in **Section 0** and are included in their entirety in **Appendices A – C**. Following the presentations, attendees were led through a series of breakout groups, which are described in more detail in **Section 2.3**.

Figure 3. Workshop Agenda

Agenda	Presenter(s)	Time
Welcome	Nicole Majeski (DeIDOT)	10 min
CCSPI Data Analysis Workgroup presentation	David Edgell (OSPC) and Andrea Trabelsi (Whitman, Requardt & Associates – consultant)	30 min
Q & A	Jennifer Reitz (U. Delaware Institute for Public Administration)	5 min
County presentation	Kris Konnelly (Kent County) Char Patibanda (New Castle County) Jamie Whitehouse (Sussex County)	15 min
Open discussion	Jennifer Reitz (U. Delaware Institute for Public Administration)	10 min
<i>Break</i>		10 min
Breakout groups	Jennifer Reitz & Team (U. Delaware Institute for Public Administration)	60 min
<i>Map and Data Gallery Walk/Break</i>		15 min
Large group recap	Jennifer Reitz & Team (U. Delaware Institute for Public Administration)	10 min
Public comment		10 min
Next steps	Nicole Majeski (DeIDOT)	5 min

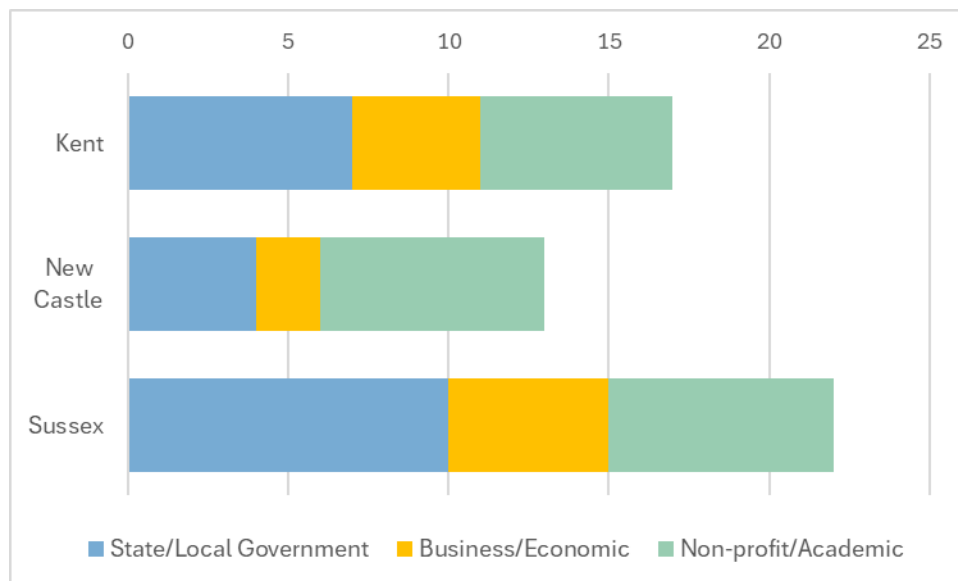
2.1.2 Attendees

Invitees for each workshop included elected officials and staff from the county and municipalities, along with representatives from state agencies, the Metropolitan Planning Organization (MPO), economic development groups, developers, farmers, realtors, business owners, and non-profit groups such as Habitat for Humanity and The Nature Conservancy.

The workshops were open to the public and advertised on the Delaware state government's public meetings calendar. A virtual attendance option was available for those who could not attend in person, but virtual attendees were not able to participate in the breakout groups.

A summary of the attendees by association is shown in **Figure 4**. Complete lists of attendees for each of the workshops are included in the Workshop Documentation packets in **Appendices A – C**.

Figure 4. Workshop Attendees by Association



In addition to the attendees, members of the DAW and staff from state agencies such as DelDOT, Office of State Planning Coordination, Delaware Population Consortium, Delaware State Housing Authority, Department of Agriculture and project team members from the University of Delaware Institute for Public Administration and consultants attended and participated in the breakout groups.

2.2 PRESENTATIONS

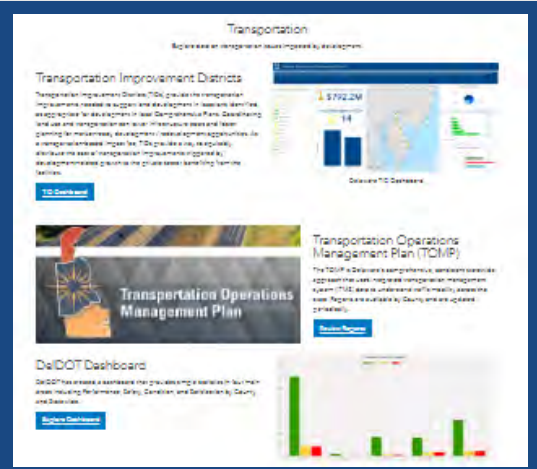
2.2.1 Workgroup Presentation

Each workshop featured a presentation from the Workgroup with information about land use, development and growth trends, as well as a presentation from staff from each of the counties. This section briefly highlights the material covered in the Workgroup presentation. The full PowerPoint presentations, including data, maps, graphs and other workshop documentation are in **Appendices A – C**.

Workgroup Resource Website

A hub website was created for Stakeholder Workshop attendees and the public seeking more information about the topics presented, and to serve as a resource for those interested in the SSPS update process. The hub site contains links to the source material for most of the data presented in the PowerPoint.

<https://ccspi-data-analysis-workgroup-delaware.hub.arcgis.com/>

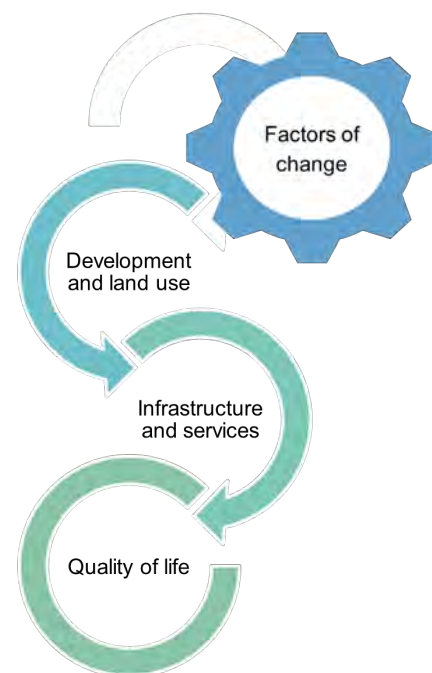


Factors of Change

There are forces outside of Delaware's control that have changed and continue to change its landscape, which must be acknowledged to understand and address the changes that are influencing Delaware's growth and development. Some of the *Factors of Change* in Delaware include:

- o **Population growth**, especially among those over age 65, which is influencing the housing market
- o Increasing prevalence of **e-commerce and remote work**, which have changed commercial building markets and travel patterns/demand; and
- o Impacts of **climate change** along the coast and inland that pose costly challenges to infrastructure and our natural environment.

These factors are impacting development patterns, transportation, the economy, the environment, housing, and more. When population growth causes a mismatch between the housing being provided and what residents can afford, working class residents are faced with options to live beyond



what is comfortably affordable, live farther out where land is cheaper but have a longer commute, or live and work elsewhere. As people choose to live farther from existing communities and employment hubs, development pushes out to more undeveloped areas and converts farms and forests to housing and shopping. Infrastructure and services also have to expand to those areas (Transportation, Education, Public safety / EMS, Healthcare, etc.) with added capital investment and growing maintenance/operations burdens.

Some of the consequences of this pattern of development that Delaware communities are facing include:

- Increasing motor vehicle traffic and vehicle miles traveled
- Affordable housing challenges
- Environmental degradation (forest, ecosystem, water, etc.)
- Risk due to climate change impacts
- “Crowding out” of industry and farming

The problem is not a shortage of land available for development, but rather where the development is located. The location and pattern of development, which will be discussed further in the next section, have impacts on infrastructure and public resources.

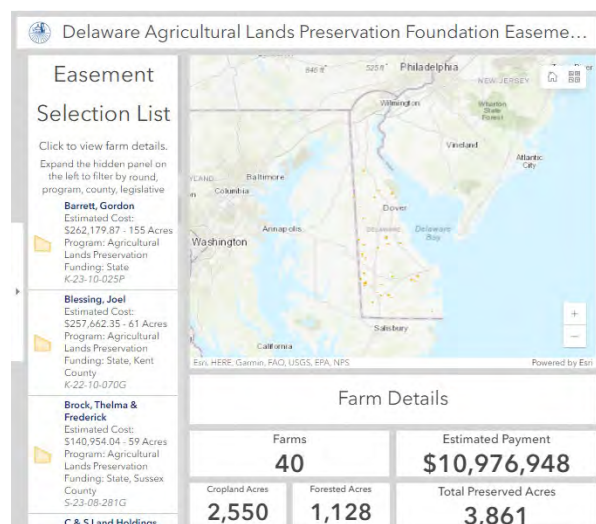
The State can’t directly control the Factors of Change, but it can influence:

- **Development and land use** through the SSPS Strategy Levels and related policies, working in collaboration with local governments;
- **Infrastructure and services**, through its role in providing them; and
- **Quality of life**, through State policies and programs.

Environment

The State also takes an active role in monitoring and studying the state’s evolving demographics, development, and environmental resources at risk. Some of the ways that State agencies are responding to these changes include:

The *Delaware Department of Agriculture* preserves agricultural land and open space through fee-simple purchase and agricultural and conservation easements. The Agricultural Lands Preservation Program has preserved over 9,000 acres over the past 10 years. In addition, the Young Farmers Program offers a 30-year, no interest loan to help young farmers purchase farmland, one of the chief obstacles to starting out in business, and the Century Farm Program honors farm families who have owned the same farmland for 100 years or longer.



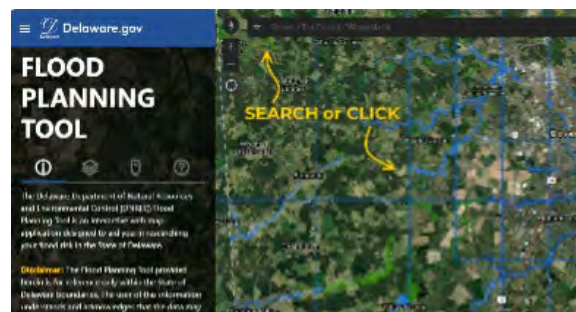


The *Delaware Forest Service (DFS)* establishes a Statewide Forest Strategy that combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. DFS tracks forest loss and impacted wetlands over time due to conversion to development, fragmentation and pests, and identifies Forest Legacy Areas that are a high priority for preservation.

Further, the Forest Service has been working to continually improve its data to track forest change and quality, to reflect how much forest is being lost or gained in a way that leverages local data/knowledge. This effort is ongoing but offers an improved data source for SSPS update and other collaborative planning efforts.

The *Delaware Department of Natural Resources and Environmental Control* leads climate action planning and tracking sea level rise, flooding and severe weather and their impacts on development, marsh migration, and roadways.

The *Delaware Emergency Management Agency* prepares needs assessment and damage assessment databases, and provides software to streamline assistance during emergencies.

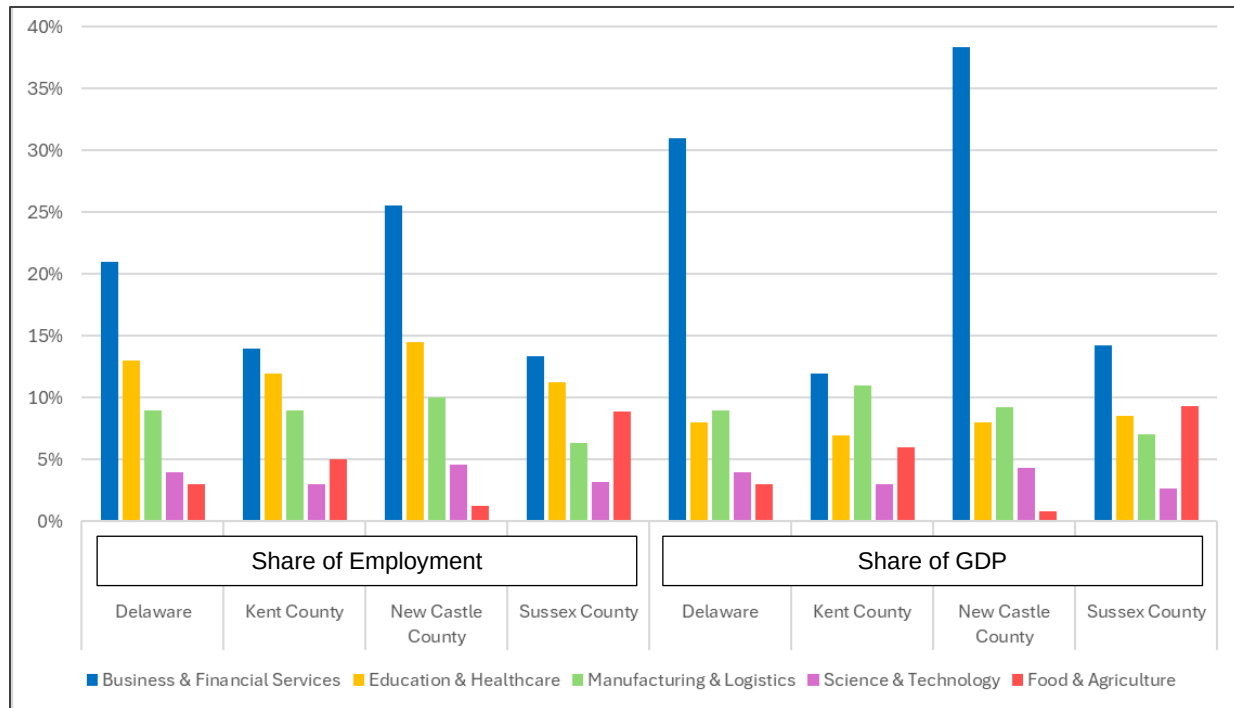


For more information about these programs and agencies, see the [Workgroup Resource Website](#).

Economy

Looking more closely at economics, the presentation considered the economic sectors that are most important in each county, compared to the state (Figure 5). New Castle County has a relatively high share of “Business & Financial Services,” for example, while Kent and Sussex counties are relatively high in “Food & Agriculture.”

Figure 5. Key Economic Sectors in Delaware, 2022



Source: IMPLAN, 2025

Considering these industries in development planning is key since they often have very different land use needs. “Business & Financial Services,” for example, needs office buildings close to amenities and services for employees. “Manufacturing & Logistics” needs lots of square footage in key locations close to transportation (such as interchanges where more than one interstate intersect) to move products. “Food & Agriculture” needs large contiguous acreage in areas with good soil. Businesses will move elsewhere if they can’t find what they need, which can be an advantage (Delaware can adjust and attract) or a disadvantage (if Delaware isn’t strategic in meeting those needs).

The land development policies and incentives that Delaware offers can shape what kinds of businesses it attracts and keeps. It’s also important to consider what future opportunities are and how Delaware can position itself to be competitive.

An additional economic consideration is that Delaware’s aging population is a Factor of Change that affects labor force participation (the percentage of the population that is working). Since 1976, Delaware’s annual average labor force participation (LFP) rate was higher than the national LFP rate. In 2009, the US annual average LFP rate surpassed Delaware’s rate for the first time and remains higher.

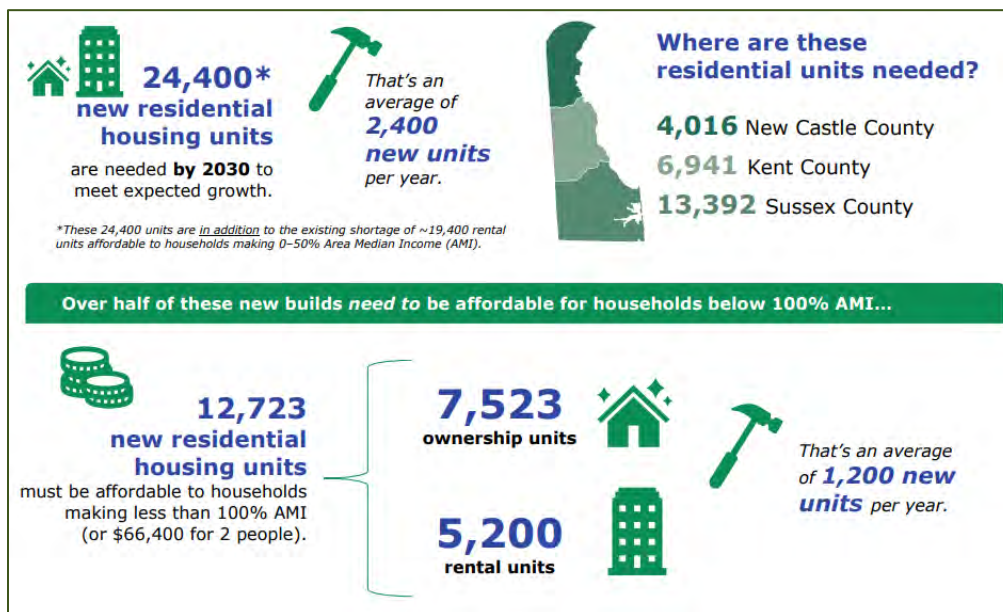
With a growing population of retirees and a decline in LFP, Delaware may end up with a worker shortage. Furthermore, the services those seniors are going to seek, such as healthcare and related services, tend

to have low earnings growth and low wages. A housing shortage and location mismatch for housing that is affordable for those workers may also make it difficult to maintain the service workforce. If there is a larger share of the population not working or without tax-eligible income, and an increasing share seeking low-wage services and putting pressure on the housing market for those workers, where does this lead?

Housing

The *Delaware State Housing Authority (DSHA)* estimates that 24,400 residential units will be needed by 2030 to meet expected growth, over half of which will be needed in Sussex County (Figure 6). An estimated half of those units needed by 2030 must be affordable to households making less than 100% AMI, which is \$66,400 for two people.

Figure 6. Anticipated Housing Needs



Source: 2023-2030 Delaware Housing Needs Assessment, Delaware Population Consortium, and Root Policy Research

The location of these affordable units is key, since they need to be located close to jobs. Many of the existing affordable units are segregated from other housing and located farther away from centers of employment. When the affordable housing is located far from employment, the result is additional traffic and impact to the transportation network.

For more about Affordable Housing

See the **Delaware State Housing Authority Housing Reform Map**

<https://storymaps.arcgis.com/stories/c7c49bfcf4264b35b22051ef36e434a3>

and the **Housing Needs Assessment Dashboard**

<https://www.destatehousing.com/about/housing-data/housing-needs-assessments/>

DSHA's housing strategy includes a Housing Reform Map that identifies Areas of Opportunity that contain little or no affordable housing but offer economic opportunity, high-performing schools, and supportive infrastructure that help households succeed. This map and more can be viewed at the link at left. The state legislature also has established the Affordable Housing Production Task Force to further address this issue.

Transportation

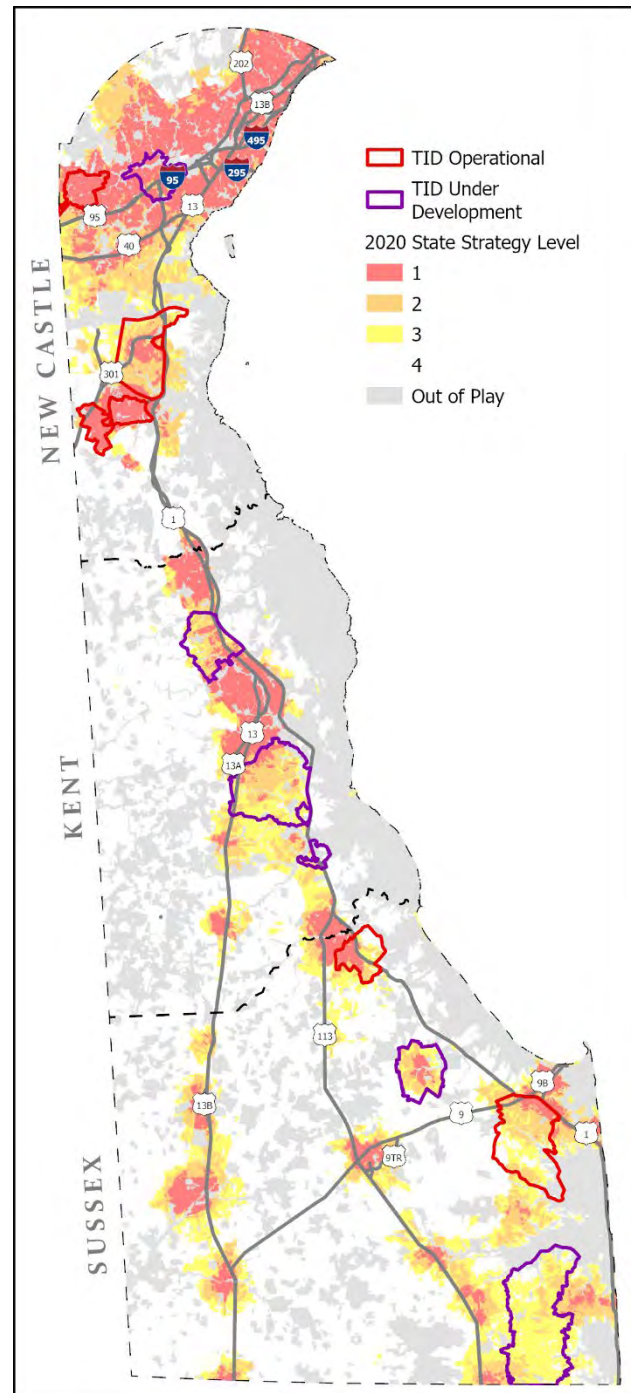
The *Delaware Department of Transportation* manages over 5,500 miles of roadway in Delaware (89% of total road miles) with increasing infrastructure costs. With the *Delaware Transit Corporation*, it is proceeding with its reimagined transit system to better serve current needs.

Transportation Improvement Districts (TIDs) are one way that DelDOT addresses needs and promotes predictability and coordination. A TID is a geographic area where land use and transportation are planned in detail in advance. New development that is consistent with planning can pay a readily-determined fee and forego the Traffic Impact Study process. The goal is that the TID fees fund the transportation improvements that are required to meet the demands of new development consistent with the local government's comprehensive plan.

TIDs foster proactive collaboration between state and local governments and developers to achieve more predictable, streamlined development of land and infrastructure. An agreement sets in place a plan for developing and funding infrastructure.

As shown in **Figure 7**, the seven operational and seven under-development TIDs are mostly located in SSPS Levels 1, 2 and 3. These 14 TIDs collectively have 74,000 dwelling units and 40 million square feet of non-residential development forecasted, with commitments of over \$1 billion in identified projects.

Figure 7. Transportation Improvement Districts

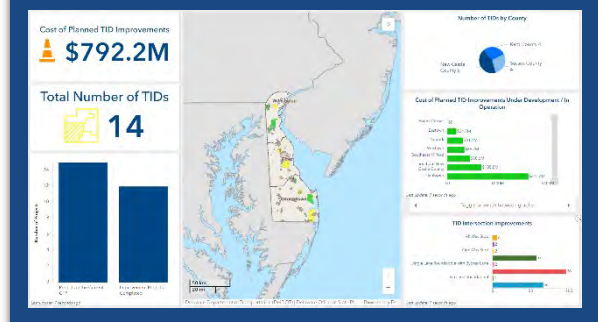


Sources: DelDOT, Office of State Planning Coordination

For more about Transportation Improvement Districts (TIDs)

Visit the **DelDOT TID Website**

<https://deldot.gov/Programs/transportation-improvement-districts/> for resources, FAQs, and to see the TID Dashboard.



Recent Development

The presentation provided data and maps to illustrate how recent development has occurred relative to the 2020 SSPS Strategy Levels. The data presented in Figures 8 – 11 compare the SSPS Strategy Levels 1 – 3 (where development is encouraged) vs SSPS Strategy Level 4 (where development is discouraged). Recent development was defined for these datasets as building permits that were issued from 2019 through 2023, in addition to PLUS reviewed developments (approved but not yet built) between January 2023 and June 2024.

Figure 8. Recent Residential Building Permit Density Maps (2019-2023)

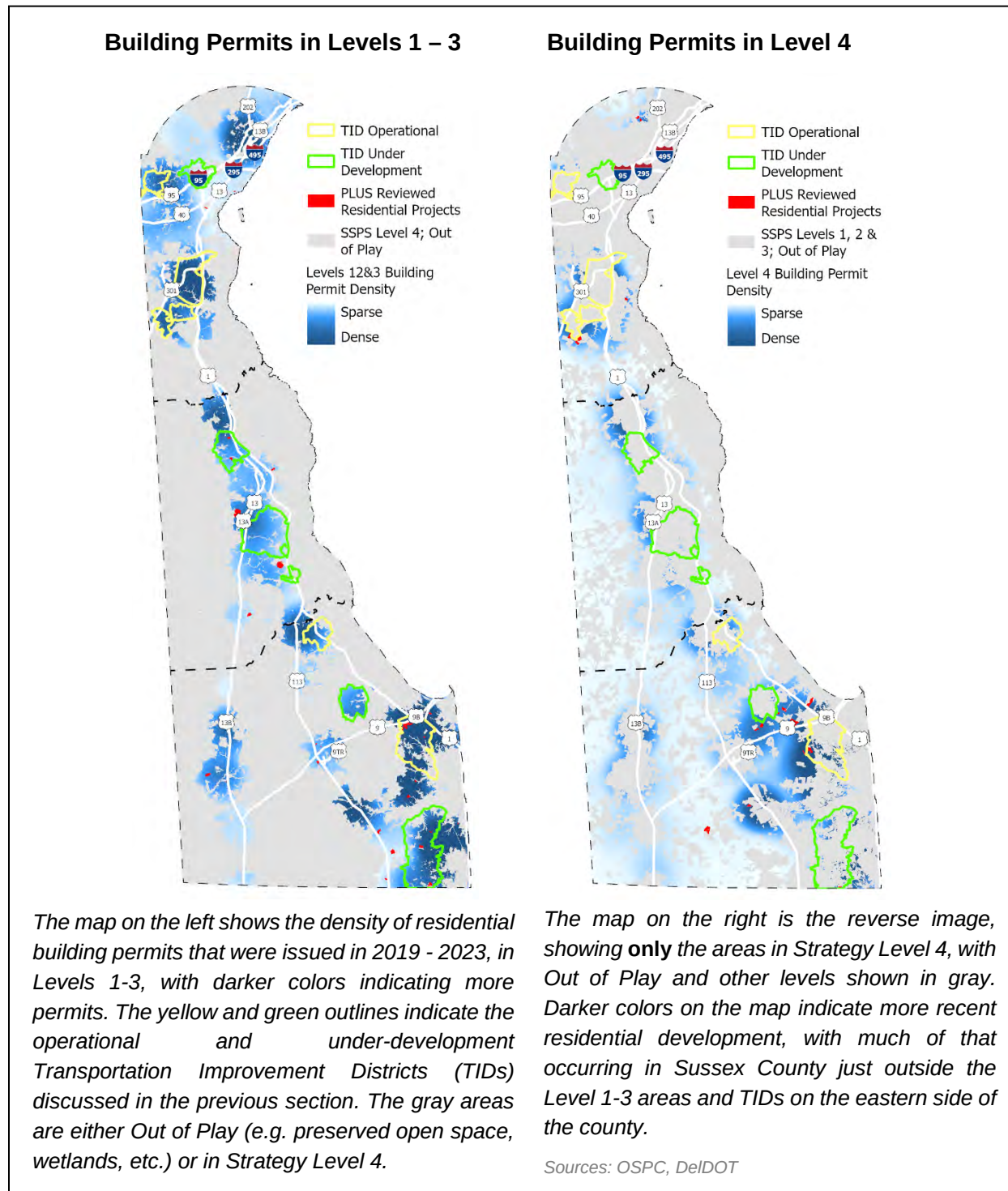


Figure 9. Recent Building Permit Statistics (2019-2023)

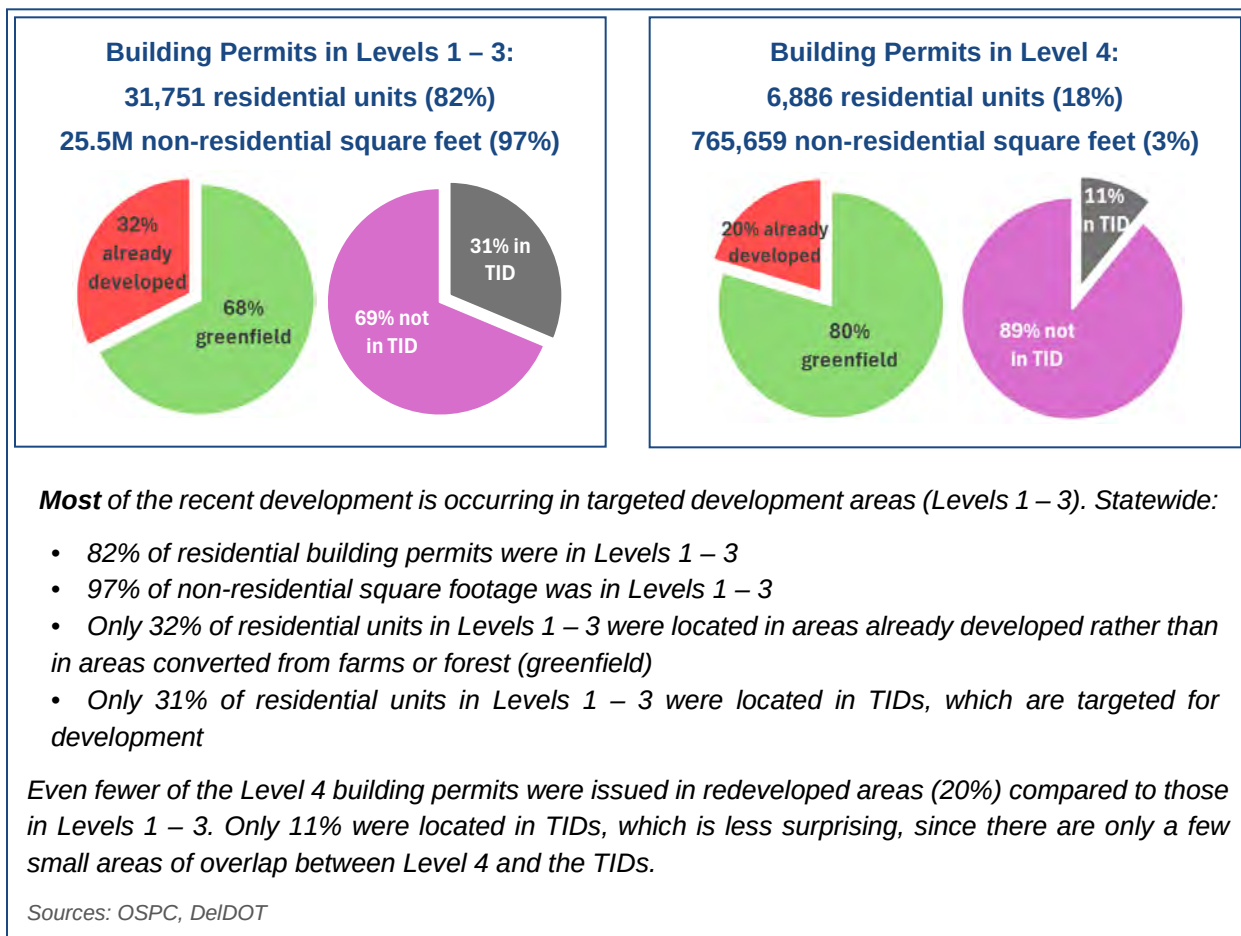


Figure 10. Recent PLUS Development (Jan. 2023 – June 2024)

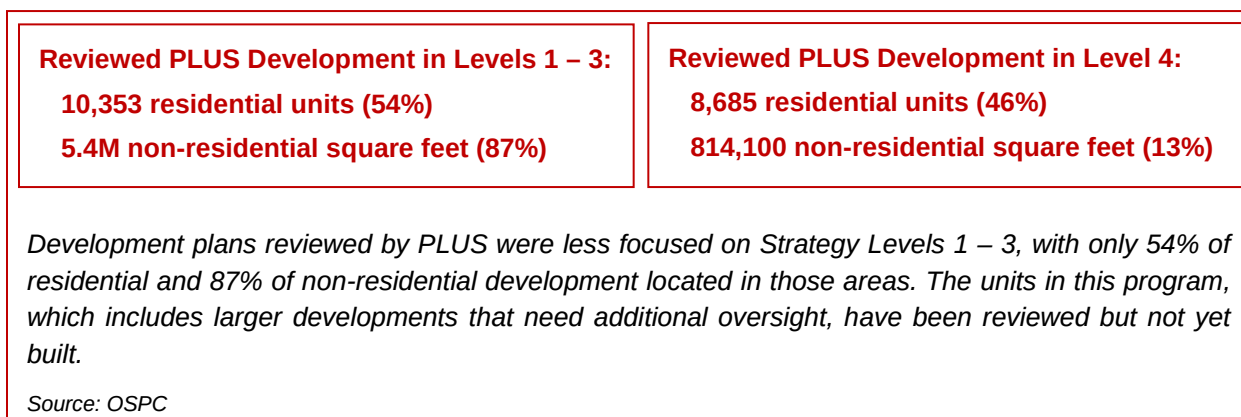
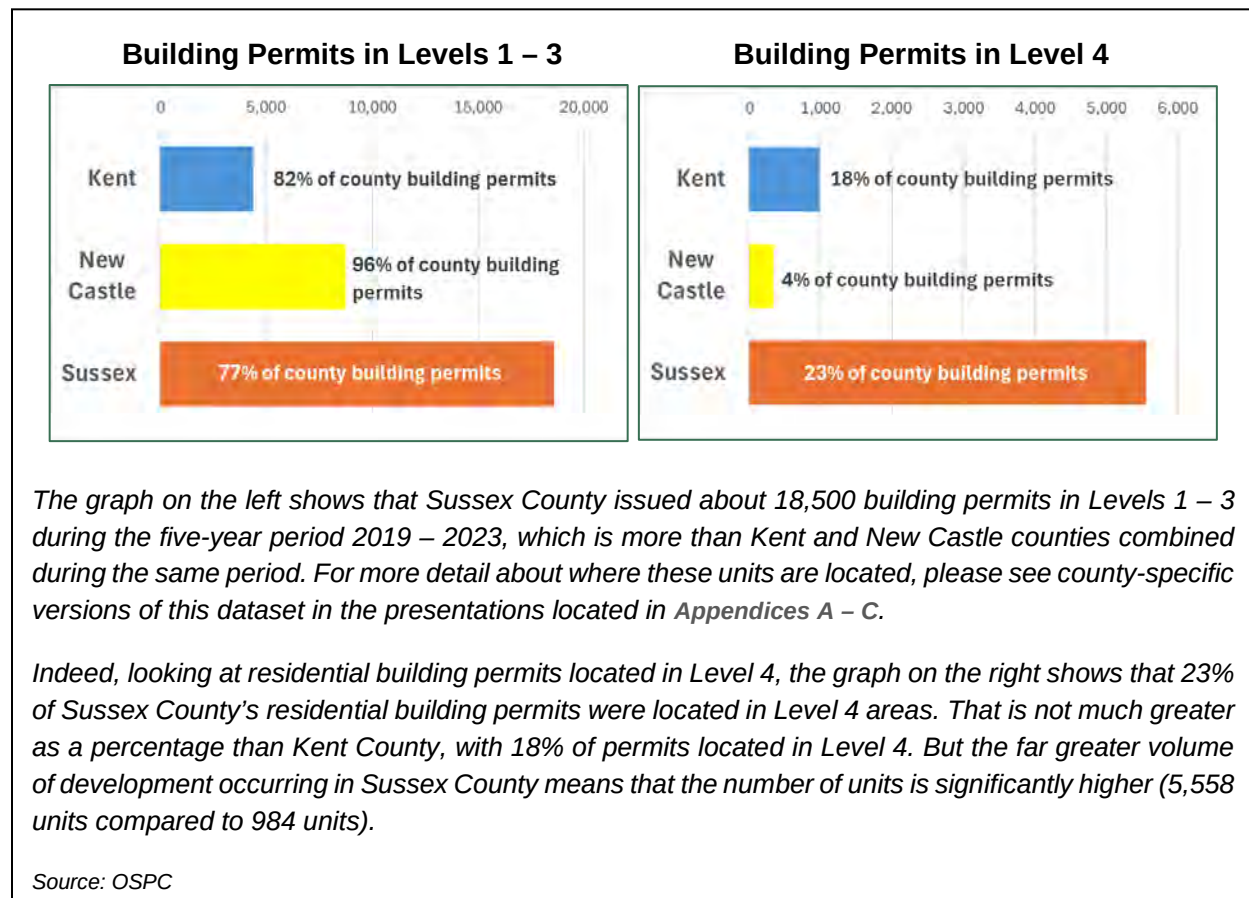


Figure 11. Recent Residential Building Permits by County (2019-2023)



Overall, most of the recent development has aligned with the Strategy Levels established in the 2020 SSPS, but there is still a lot of room for improvement. The share of PLUS projects located in Levels 1 – 3 could be higher (currently only about half), and the share of PLUS projects located in Level 4 approved but not yet built PLUS projects is greater than the share of Level 4 recent building permits, potentially indicating that the trend of **development in Level 4 is not only continuing but worsening**.

The percentage of permits located in TIDs could be higher (currently only about a third). In addition, development impacts are lower when it occurs in areas already developed because the infrastructure already exists, and farms/forest are not converted. **Only about a third of recent development was redevelopment.**

Accommodating Forecasted Growth

A simple supply / demand analysis was conducted to compare the Delaware Population Consortium's forecasted households over the next 20-30 years to the potential residential units forecasted at the time of establishment in the 14 operational and under-development Transportation Improvement Districts (TIDs)*. **Figure 12** presents the analysis results. Supply, shown in blue, indicates the number of housing units that could be built within TIDs in the three counties. Demand, shown in red, is the most conservative estimate of projected dwelling units needed to accommodate population growth.** Potentially developable acres, shown in green, is the amount of land that hasn't already been developed and is not "off limits," shown only for the areas inside TIDs. Additional county-specific details and maps for this analysis are included in **Appendices A – C**.

This analysis suggests that forecasted population growth in all three counties could be accommodated within the active and under-development TIDs alone. There is no assumption in this analysis of any redevelopment of existing buildings, nor growth in Levels 1 – 3 that are not part of TIDs, both of which would accommodate additional development. This analysis further suggests that there is no shortage of developable land to accommodate growth in growth-targeted areas (TIDs and Levels 1 – 3).

Figure 12. Supply vs. Demand of Forecasted Dwelling Units in TIDs

Transportation Improvement Districts (TID)	Forecast Year	Dwelling Units		Potentially Developable Acres***
		SUPPLY*	DEMAND**	
KENT	2045	16,206	14,851	8,316
NEW CASTLE	2040	20,697	5,667	5,497
SUSSEX	2045	39,633	33,678	18,736
TOTAL		76,536	54,196	32,549

Sources: DelDOT, Delaware Population Consortium

* Supply estimate is the latest available development forecast generated when TIDs are established.

** Demand is shown as the greatest potential growth between 2020/2025 and forecasted 2040/2045 figures

*** Potentially developable acres are defined as those that are not Out of Play, already developed, impervious, wetlands or

2.2.2 County Presentation

Following the Workgroup presentation, county staff were given the opportunity to share their reactions to the Workgroup presentation as well as insights from their County's recent development. PowerPoint presentations for New Castle and Sussex counties are included in **Appendices B and C** (Kent County's representative spoke without a PowerPoint). Some of the highlights of the county presentations were:

Kent County

- County is hopeful that the 4 TIDs under development will be completed soon so that they can be implemented
- County has strict environmental regulations protecting wetlands, floodplains, and woodlands – both inside and outside the growth zone
- Growth zone requires public sewer and water and allows a general density of 3 units per acre. Maximizing density for projects is key (e.g., if zoning permits 300 units, but the project only ends up with 220 units, why is that? How can the County encourage developers to build the maximum allowed density?)
- The County generally approved one major subdivision each year over the last ten years, but Kent has been seeing some projects finally built that were approved in the early 2000s but delayed for economic reasons. Since the new subdivision and land development code was adopted in 2004, there have been zero new subdivisions outside the growth zone
- Keep in mind that municipalities also approve development, not just the County
- Economic growth is expected east of Route 1 in Dover Air Force Base.

New Castle County

- Summarized several new and proposed development programs and ordinances:
 - Proposed changes to redevelopment: permit variances if consistent with guiding principles, changes to gross floor area and impervious surface calculations, incentivizes historic preservation, energy efficiency, and Commercial Corridor redevelopment
 - Accessory Dwelling Unit (ADU) Ordinance: reduced acreage requirement, removed cap on total ADUs in the County, permits small single-family residences as ADUs
 - Pocket Neighborhoods Ordinance: Community Services Committee Meeting coming up

Sussex County

- Discussed growth areas established in the Sussex Comprehensive Plan
- Shared metrics for proposed development, re-zonings and Board of Adjustment applications since 2004 and discussed development trends
- The County provides permitting services for 14 of the 25 municipalities in the County
- Suggested potential changes to datasets that are part of the SSPS Update, specifically healthcare and libraries



2.3 BREAKOUT GROUPS

Following the presentations, workshop attendees were divided into four groups for round-robin breakout sessions: Transportation, Environment, Economic Development, and Housing. Photos of the sessions are shown in Figure 13.

Each small group spent about 15 minutes responding to the prompts shown in Figure 14 then rotated to another topic area until all topics were addressed. Discussion at each breakout group was led by a facilitator from the University of Delaware Institute for Public Administration.

The questions were intended to focus discussion on ways to facilitate cooperation between local governments and state agencies, and how the SSPS Strategy Levels might better reflect the current needs of the local communities. Feedback collected during the breakout groups is described further in Section 2.4.

Figure 13. Photos from Breakout Groups at Stakeholder Workshops



Photo credit: Andrea Trabelsi

Figure 14. Breakout Group Focus Questions



2.4 WORKSHOP OUTCOMES

The breakout groups generated substantial discussion between the workshop participants and produced ideas for how to address these complex issues. See **Appendices A – C** for full notes taken during the discussion at each of the three workshops. **Appendix D** presents the same workshop notes side-by-side for each topic, to facilitate analysis across all three county-specific discussions.

Some consistent themes across the three workshops in the four topics (Transportation, Economic Development, Environment and Housing) are shown in **Figure 15**. The ideas generated from the discussion to address these topics range from relatively straightforward, such as providing assistance to update municipal codes for affordable housing, to more complex, such as expanding rail and transit networks. The exercise presented to workshop participants deliberately did not impose limitations such as funding, time, and authority. Participants were asked to brainstorm ideas that would address the questions provided, based on their understanding of the development process.

A next step, and part of the SSPS update process, will be to consider and prioritize near-term actions to move toward implementation. Those implementation steps are identified in **Section 3.1**.

Workshop Follow Up

At the end of each workshop, participants were encouraged to submit any ideas or questions they might have via email. A dedicated email address (strategies@delaware.gov) was established for that purpose and shared with participants. One follow-up email was received from a participant of the Sussex County workshop, and a response was provided.

Participants were also encouraged to continue diving into data and information that the Workgroup presentation touched upon by visiting the Workgroup Resource website, or “hub” site that contained links to most of the sources for data presented during the workshop (<https://ccspi-data-analysis-workgroup-delaware.hub.arcgis.com/>)

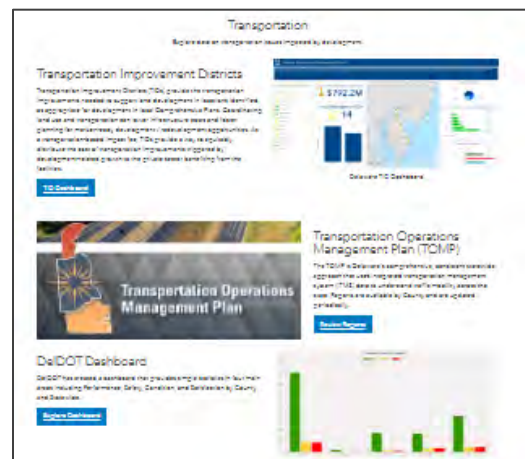


Figure 15. Summary of Comments by Topic

Transportation

- Desire for more customized approaches for each county and a designated DeIDOT liaison
- More partnership, communication, and coordination between state and local govts
- Desire for a more comprehensive approach: county and statewide TIDs, statewide comprehensive transportation plan, corridor plans, addressing long term needs of municipalities outside of TIDs
- Give DeIDOT the ability to say “no”
- Make it more efficient and cost effective to develop in growth areas/TIDs than outside of them (cost per unit, process time, rural impact fee, etc.)

Economic Development

- Support and expand needed infrastructure - utility update fund, sewer expansion/upgrade fund, expand broadband, attract additional sources of electric generation
- Transportation: east-west corridors, expand rail networks, freight, expand transit
- Ag: support and strengthen farming/young farmers; help farmers to diversify their revenues, protect from encroaching development, solar
- Preserve existing industrial lands and land surrounding airports and railways
- Long-term plan and fund to maintain open waterways for recreation (dredging) and beach replenishment
- Retain and expand educational and training pipelines to needed industries (medical school)
- Provide incentives to attract and retain needed talent (affordable housing near employment, student loan forgiveness, improved salaries)

Environment

- Preservation policies between agencies need to be more complementary
- Public education and awareness about environmental value, role in resilience & climate change, and value of preservation
- Preservation funding formulas reevaluated to align with stated goals
- Incentive to preserve equal to/greater than the incentive to develop
- Update ordinances to protect resources, build in climate change, (less expensive than acquisition)
- State vision for climate change and resilience
- Collaborative approach to long-term funding for resilience/adaptation measures

Housing

- Provide guidance for how local comp plans should address affordable housing and add a minimum requirement for State approval
- Provide a menu of strategies for how local governments can address affordable housing and provide incentives to implement a baseline number
- Provide assistance to municipalities to update codes that allow affordable housing
- Educate decision-makers and the public on housing needs and clarify affordable housing types, relationship to services and needs
- Be creative- more pilot programs and partnerships. Explore rent-to-own program, shared vacant building registry, and redevelopment/rehabilitation incentives
- Fasttrack and/or streamline approval processes

3 Synthesis

3.1 KEY IDEAS RAISED ACROSS TOPICS

The previous section detailed the ideas and comments of the workshop attendees, who represented a wide range of backgrounds and interests from across the state. Synthesizing what was shared in the workshops, the following are action-oriented themes that emerged across the discussions (Figure 16).

Figure 16. Key Ideas Raised Across Topics



While these seven *Key Ideas* are important, they are also quite complex to implement. Many would require legislation, dedicated funding, and the efforts of multiple agencies over several years to be fully implemented. To begin working toward these goals, Figure 17 presents short-term actions for each of these seven *Key Ideas*. These actions are detailed in the table and will be considered by CCSPI for incorporation into the SSPS Update Report as implementation items.

Figure 17. Implementation Steps for Key Ideas

Adherence to State Strategies	<i>The SSPS Strategy Levels are created at the state level and implemented through agency infrastructure and service delivery decisions and through regulations. State agencies can take a larger role in ensuring adherence to State Strategies if they have the ability to reduce resources and approvals for prospective development based on its location and its impacts.</i>
A1	Review current regulations and ordinances to determine what would be required to increase the adherence to the State Strategies. Are there any changes that can be made within current regulations?
A2	Task the Strategies Implementation Team to work with stakeholders to develop guidance for how those changes in adherence should be made.
A3	Review state agency policies and permits to identify those that do not consistently support the State Strategy levels.
Improved Coordination	<i>The SSPS Strategy Levels are created at the state level and implemented through agency infrastructure and service delivery decisions and through regulations. Land use is enforced at the local level, so having consistent, open communication between state and local stakeholders is key to effective implementation of the State Strategies.</i>
A4	Work with the Strategies Implementation Team to provide opportunities for state agencies and local government staff to share data, ask questions and discuss topics of interest.
A5	DAW to continue engaging local stakeholders to improve communication and implementation of the State Strategies through periodic engagement.
A6	Solicit ideas for improved coordination from staff in each county, to assist in developing a tailored approach suited to local circumstances.
Consider Costs & Incentives	<i>State Strategy levels will be more effective in directing development when the incentives to developers match the Strategy Levels. It should be more cost effective to develop in growth areas rather than preservation areas. Changing how taxes, fees and methods of funding infrastructure affect stakeholders can influence the decisions they make and how development occurs.</i>
A7	Brainstorm ideas to change incentives to encourage development in Levels 1 – 3. These could include making the development process faster in Levels 1 - 3 (or conversely, slowing it down in Level 4 areas) or adjusting impact fees to favor development in Levels 1 – 3.
A8	How is development funded, and who pays the cost? Research how impact fees and other revenue sources influence development. How have other jurisdictions established incentives to direct development? Are these policies transferable to Delaware? Have they been effective? Potentially engage university partners to assist with this research.
A9	Delaware Department of Agriculture to conduct outreach with farmers to inquire what programs or policy changes would make it easier to continue farming. Farmers who are successful are less inclined to sell their land to developers. Research programs that have been used in other jurisdictions to support farmers. What programs could be transferable to Delaware?

**State
Guidance**

While many statewide plans guide development, more statewide guidance in the areas of climate change, comprehensive transportation planning, corridor planning, and transportation planning outside of TIDs would be beneficial. Having a vision at the state level would encourage collaboration with county and local governments.

- A10 Set up a meeting with a stakeholder group including OSPC and DelDOT to brainstorm ideas for transportation planning and guidance that needs to happen at the state level. Establish a DelDOT liaison or other planning partner for each county. How can DelDOT help the local governments to plan more effectively?
- A11 Determine whether these needs for guidance can be accomplished with current funding and staff availability, and determine an implementation process for those that need a larger effort.

**Public
Education**

Many of the concepts that are part of the SSPS discussion, such as TIDs, affordable housing and climate change, may not be well understood by the general public and many of the people who are implementing the Strategy Levels at the local level. Improved education and awareness can facilitate a shared understanding of the challenges that Delaware faces.

- A12 Launch an online survey for elected officials and staff in county and municipal governments to determine the topics that are of the most interest, and where people have questions that need to be addressed.
- A13 Initiate bi-monthly or quarterly 1-hour webinar series for elected officials and staff in county and municipal governments, consistent with the OSPC communication strategy. Each webinar could cover a different topic, as presented by state agency staff or University of Delaware Institute for Public Administration. Explore incentives for attendance. Record and share webinars for those not able to attend.

**Expand on
Success**

The Downtown Development District (DDD) program has been very successful in bringing improvements to the smaller municipalities in the State. Are there other innovative pilot programs and partnerships that could also be beneficial? Explore rent to own program, shared vacant building registry, redevelopment/ rehabilitation incentives, etc.

- A14 Engage with the DDD Resource Team at one of their monthly meetings. What elements have led that program to be successful? What could be capitalized upon to expand to other initiatives?
- A15 Holistically evaluate the incentives for redevelopment. Do the incentives work together, or are there some that counteract or result in unintended consequences? Identify ways to strengthen the incentives for redevelopment and develop complementary programs.

3.2 SUGGESTED SSPS DATA CHANGES

The process to create the SSPS Strategy Level map involves combining many data layers, such as proximity to infrastructure like water/sewer service as well as limits on growth like flood risk. Part of the reason for 5-year updates to the map is to capture updated data sources and potentially new and different data sources that better reflect current priorities.

Several workshop participants made specific suggestions for changes to the SSPS mapping process, which are included in **Figure 18** below. Staff from the Office of State Planning Coordination (OSPC) will follow up with these suggestions to determine if they are feasible to incorporate.

Figure 18. Suggested Specific SSPS Data Changes

ID	Comment	Source	Action
B1	Broadband and the capacity of the electrical grid should be considered in the development of future growth areas	Kent County Workshop	OSPC to discuss with applicable agency/data steward
B2	Existing and future capacity of roads, both inside and outside of TIDs, should be considered when planning for growth areas	Kent County Workshop	
B3	Use new state climate projections, instead of national climate projections, for the State Strategies	Kent County Workshop	
B4	Future risk to communities and inundated roads should be accounted for in the Strategies mapping	Kent County Workshop	
B5	Consider marsh migration in areas designated for both agriculture and development	Kent County Workshop	
B6	Drill further down into NCC permits to ensure that they reflect new housing units/rehabbed units and not additions or other improvements. Clarify what type of development is happening in Level 4 in NCC.	New Castle County Workshop	
B7	Update wetlands mapping to identify future areas for protection (marsh migration)	New Castle County Workshop	
B8	Clarify how Housing Opportunity Areas overlap with school districts	New Castle County Workshop	
B9	Include distance between jobs and houses, wages, and taxes in employment area planning	New Castle & Sussex County Workshops	
B10	The County will share updated building permit data in early 2025. This data shows that building permit applications slowed/plateaued in 2024.	Sussex County Workshop	
B11	County would like to discuss expanding the radius surrounding libraries that are favored for growth from 1 mile to 3 miles, in addition to reviewing the radius for other essential public amenities	Sussex County Workshop	

Appendix A: Kent County Workshop Documentation



Building Collaborative Perspectives on Growth and Development
Kent County Workshop
October 23, 2024

Meeting Summary
Approved January 10, 2025

Workgroup Members Present:

Nicole Majeski, Secretary, Department of Transportation, Chair
Emily Cunningham, Delaware State Housing Authority
Dan Blevins, WILMAPCO
Kyle Hoyd, Department of Agriculture

1. Secretary Majeski brought the meeting to order and welcomed the stakeholders (attendance list attached)
2. Andrea Trabelsi presented the Data Perspectives Powerpoint (attached)
3. Kris Konnelly provided a brief overview of County perspectives and initiatives.
4. Stakeholders broke into 4 breakout groups: Transportation, Environment, Economic Development and Housing. Stakeholders rotated between groups, participating in all four topics. A summary of the discussion follows.

Overarching Themes and Feedback:

Feedback related to data and the development of the State Strategies:

- Broadband and the capacity of the electrical grid should be considered in the development of future growth areas
- Existing and future capacity of roads, both inside and outside of TIDs, should be considered when planning for growth areas
Use new state climate projections, instead of national climate projections, for the State Strategies_
- Future risk to communities and inundated roads should be accounted for in the Strategies mapping
- Consider marsh migration in areas designated for both agriculture and development

Key Ideas Raised Across Topics:

- **Communication, Coordination, and Shared Data:** There is a need to continue to improve communication, data sharing, and coordination between OSPC, other agencies, and municipalities PUB



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- **Greater enforcement of State Strategies:** Can we put more teeth into PLUS and the State Strategies and give agencies the power to say no to development that cannot be efficiently supported with infrastructure
 - Provide consistent state policies in alignment with State Strategies to increase predictability (solar, climate change vision, etc.)
- **Climate Change:** A single state vision for climate change and resilience and a single office that holds responsibility
 - How should we prioritize roads/communities that are inundated daily? What are the alternatives to bailing out communities with only one way in and one way out? Should we continue to allow growth in these areas?
- **Public Education**

Transportation Breakout Group

Question 1: How can the state work with county and local governments to help guide new development toward Transportation Improvement Districts (TIDs) and other designated growth areas?

Question 2: How should transportation infrastructure proposed outside of TIDs, and other designated growth areas be addressed and funded?

Comments specific to Transportation:

- There is a strong desire to improve direct engagement, data sharing, and coordination between the State and local governments
- Participants want to put more teeth into PLUS and the State Strategies, giving DelDOT the power to say no to development that cannot be efficiently supported with infrastructure. This would add to the credibility of PLUS
- Many stakeholders do not clearly understand TIDs and want to focus on a more comprehensive state or countywide transportation plan. There was strong agreement that a more streamlined approval process would be beneficial.
- Consider a comprehensive transportation investment policy; don't concentrate on TIDs at the expense of existing municipalities that need investment
- Expand the geographic boundaries for TISs conducted outside of TIDs
- Require developers to pay more for infrastructure outside of growth areas



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Environment Breakout Group

***Question 1:** What are the barriers and opportunities to more effectively protecting and preserving important ecological resources, open space, and farmland?*

Barriers

- Lack of shared federal and state data
- Conflicting government agency policies, i.e., solar
- Property rights and funding
- Lack of shared vision for climate adaptation and resilience
- Development in L4 agricultural areas challenges the viability of the ag industry and creates issues such as obstructing the transport of farm equipment.

Opportunities

- Public education on preservation, environmental issues, and agricultural heritage; Transfer of Development Rights
- Greater communication between farmers, developers, the State, county, and other stakeholders
- Require new roads and infrastructure to account for farmers and their equipment
- Plan for marsh migration in both agriculture and development areas
- Increase density allowances to reduce sprawl
- Use open space as buffers to critical resources
- Counties could play a greater role in converting open space into parks
- Review regulations that allow in-season crops to be imported from out of state
- The incorporation of climate change (SB 237, HB 99) into the Comprehensive Plan process

***Question 2:** How should state capital resources be invested in areas with increased risk of damage from more intense storms, flooding, sea level rise, and other hazards?*

Regulatory

- Update infrastructure and stormwater and sediment regulations to factor in climate change
- Update and maintain stormwater and drainage systems, including tax ditches
- Incentives to incorporate buffers in critical areas
- Require forecasted conditions to be incorporated into capital planning
- Apply 100-yr floodplain standards in the 500 yr floodplain and consider off-limits to development
- Maintain existing preservation efforts/current Kent County policies

Other

- Update mapping and data
- Provide cost analysis comparing evacuation vs. infrastructure adaptation
- Educate people on the risks and concerns of climate change and impact



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- Increase communication between counties, understanding Sussex's challenges
- Utilize ditches
- Ensure that when there is a disaster in levels 1 or 2 that there is still operable infrastructure

Economic Development Breakout Group

Question 1: What land and infrastructure assets should be preserved and enhanced to support the needs of current and emerging businesses and industries? How might the State best incentivize this?

- Work with counties to identify key future industries. Kent Econ Partnership posed that these should be manufacturing, logistics, and food and agriculture for Kent County.

Infrastructure Needs

- Upgrade broadband infrastructure/look at fiberlines
- Create a utility update fund (electric and water) as a state incentive
- Create more transit routes near workforce housing and as an effort for public safety
- Incentivize more electric generation in DE
- Incentives for residents to tap into natural gas lines
- East-West truck route

Agricultural vitality

- Continue funding Agland Preservation and supporting young farmers
- Protect farmers from solar power; promote solar on Ag structures not Ag land
- Support ways for farmers to diversify their funds and industry

Land for Industry

- Preserve existing industrial lands and reserve land along the rail lines and near airports in growth zones for industrial parks
- Protecting businesses with wetland buffers

Other

- Support the Dover Air Force Base on a potential runway for private planes, including access to Port Mahon for good access to fuel
- Funnel funds directly to a municipality

Question 2: What investments are needed to attract and retain a workforce that both serves the needs of an aging population and fuels a competitive economy?

- Invest in training and trade schools (high school and post-secondary) for needed occupations (nurses and specialist doctors)
- Invest in education and continuing education opportunities
- Create co-working spaces (WeWork-like spaces)



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- Invest in support systems for workers: affordable housing; childcare (universal); living wages
- Establish arts and cultural experiences to attract people

Housing Questions

1: *How can the State work with local governments to facilitate the development of diverse housing that meets residents' affordability needs?*

2. What are the barriers to and opportunities for increasing mixed residential development in SSPS levels 1 through 3?

Intergovernmental Coordination

- Coordinate and require sharing of current land use and ownership information between government agencies
 - Have a shared system for communicating about developments
 - Coordinate redevelopment opportunities between municipalities, particularly a shared vacant building registry. Opportunity for affordable housing or people displaced from natural disasters

Zoning reform

- Provide a menu of strategies to address affordable housing to local governments and provide incentives to implement a baseline number
- Allow for Accessory Dwelling Units, inclusionary zoning
- Review open space requirements and consider a fee-in-lieu option
- State Standard for density
- Eliminate public hearing requirements for by-right uses, while still informing the community

Incentives

- Incentivize rehabilitation of older housing and redevelopment
 - Look at taxes as they relate to housing and redevelopment
- Waive permit fees and impact fees/provide expedited permitting for affordable units
- Provide financial support for local impact studies that calibrate fees to local needs.

PLUS/State Strategies

- Shorten or alleviate PLUS for development in the growth areas. Put more teeth in the PLUS and State Strategies
- More circuit riders to help write codes and provide examples of model ordinances
- Give DelDOT the ability to say no to providing roads in areas where they aren't planned for.
- Provide a state density standard for development levels and for affordable housing

Public education

- Public education on "affordable" housing, benefits of multigenerational communities



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Other

- More useful to drive development into municipalities/municipal infrastructure through annexation
- Foster collaboration between architects, landscape architects, planners and engineers for innovative designs
- Look at use of the Real Estate Transfer tax. Is it a barrier? Should it support infrastructure and affordable housing?
- Does building more supply make a difference when the people keep coming from out of state? Will there ever be enough supply?

Attachments:

Attendance list

State Presentation

DAW- Kent County Workshop
Sign-In Sheet

✓	Name	Organization	Initial Breakout Group
	Kris Connelly	Kent County Levy Court Planning Office	Transportation
	Dawn Melson-Williams	City of Dover Department of Planning & Inspection	Economy
	Dave Hugg	City of Dover, City Manager	Economy
	Rob Pierce	City of Milford Planning Director	Housing
	Ryan Paisley	Town of Clayton Vice Mayor	Environment
	Linda Parkowski	Kent Economic Partnership	Economy
	Marilyn Smith	Dover/Kent County Metropolitan Planning Organization	Transportation
	Katie Gillis	Home Builders Association of Delaware	Housing
	Shelly Cecchett	Kent Sussex Leadership Alliance	Environment
	Dave Marvel	Marvel Farms; Kent County Farm Bureau	Transportation
	Curt Fifer	Fifer Orchards	Economy
	Georgie Cartanza or Drew Harris	Georgie: UD Cooperative Extension Poultry Drew: UD Cooperative Extension Kent County Agriculture	Environment
	Tim Riley	Kent Conservation District	Housing
	Danielle Swallow	Delaware Sea Grant; Reliant and Sustainable Communities League	Economy
	Marc Healey	The Nature Conservancy	Transportation
	Karen Speakman	NeighborGood Partners	Housing
	Sarah Carter	United Way of Delaware Stand By Me Home Program	Environment



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Building Collaborative Perspectives on Growth and Development

October 23, 2024 | Kent County

Agenda for Fall 2024 Workshops

Objectives:

Build awareness

Share data-driven
information

Gain common
understanding
and consensus

- I. Welcome (10 min)**
- II. CCSPI Data Analysis Workgroup presentation (30 min)**
- III. Discuss and Reflect (15 min)**
- IV. Break (10 min)**
- V. County presentation (15 min)**
- VI. Discuss and Reflect (10 min)**
- VII. Breakout (50 min)**
- VIII. Gallery Walk/ Break (10 min)**
- IX. Large group recap / discussion (10 min)**
- X. Public comment (15 min)**
- XI. Next steps (5 min)**



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State Perspective Presentation

I. State Planning Overview – role of State and Local Governments

II. Data-backed insights

III. Further into the data





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I. State Planning Overview

Planning policy and practices in Delaware

State Planning Role



STATE STRATEGIES FOR
POLICIES AND SPENDING
DOCUMENT AND MAP



REVIEW LOCAL
GOVERNMENT
COMPREHENSIVE PLANS

FORWARDS REPORT AND
RECOMMENDATION TO
GOVERNOR FOR
CERTIFICATION *



ORGANIZE COMMENTS FROM
STATE AGENCIES VIA THE
PRELIMINARY LAND USE
SERVICE (PLUS)



PROVIDE TECHNICAL
ASSISTANCE



Like those stationed in the lookout towers, keeping their eyes on the horizon...

Local Planning and Coordination



Title 22 requires all municipalities to prepare comprehensive land use plans

Text and maps have the “force of law”



Title 9 requires county governments to prepare comprehensive land use plans

Map or Map Series has “force of law.”



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State Funding for Infrastructure and Services



90%

Public School
Transportation



85%

State Roads



100%

State's Largest
Police Force



60–80%

Public School
Construction



60%

Public School
Operations



30%

Paramedics

*Delaware at or near the top of state share
of all government spending:*

Table 1-4. State Share of Spending in Delaware, Neighboring States, and the United States, 2005

Jurisdiction	State Share of Spending as a Proportion of All Government Spending on Select Items (Rank Among States)			
	Highway Spending	Parks and Recreation Spending	Police Protection Spending	Total Spending
Delaware	81.0% (5)	57.6% (1)	35.3% (2)	78.0% (7)
Maryland	67.3% (19)	9.5% (37)	21.1% (15)	64.9% (29)
New Jersey	62.6% (28)	44.3% (3)	16.8% (27)	63.6% (32)
Pennsylvania	77.2% (10)	17.5% (26)	25.4% (5)	62.6% (36)
U.S. Average	61.2%	14.1%	13.4%	62.0%

Source: Governing: State & Local Sourcebook. Originally compiled from the Annual Survey of Government Finances, 2004-2005, U.S. Census Bureau. Accessed on June 3, 2008, from sourcebook.governing.com.

What is the Strategies for State Policies and Spending?

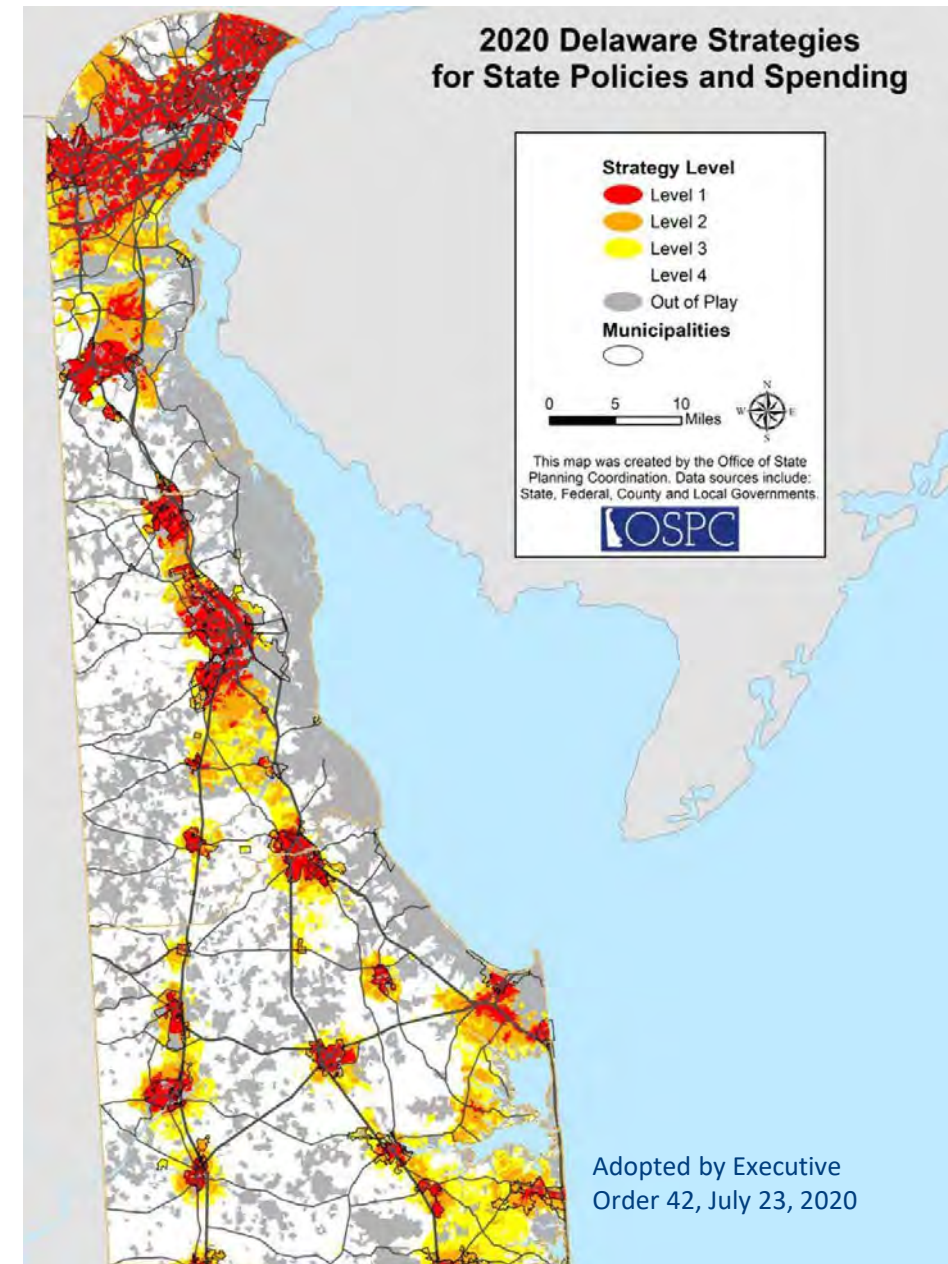
- **Required by Delaware Code*:**

... The Committee shall consider matters relating to the **orderly growth and development** of the State, including, but not limited to:

Preparing the Strategies for State Policies and Spending document and maps, which shall serve as the primary policy guide that summarizes the State's land use goals, policies and strategies and **directs State spending into investment levels that support the most efficient use of State resources...**

- **Policies and maps guide State investments in infrastructure and services**
- **Do not preempt local land use authority; localities make own land use decisions per Delaware law**
- **Must be considered in local comprehensive plans**
- **History: 1999 adopted; Updated in 2004, 2011, 2015 & 2020**

*Title 29, Chapter 91, Section 9101 (c) (5)



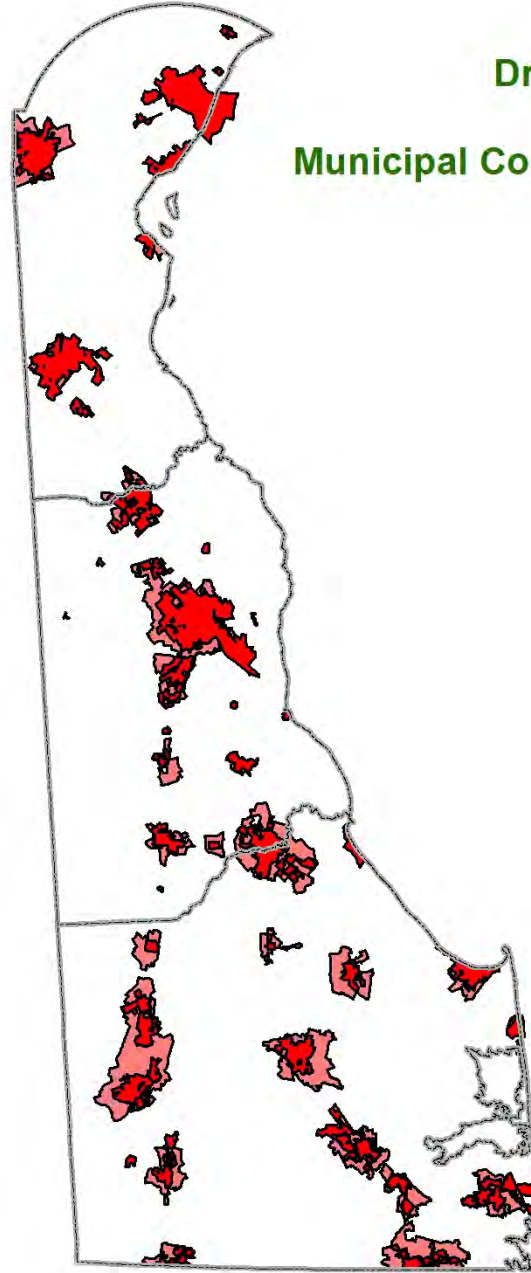
Data used to make maps include:

- School Sites
- Transit Routes
- Social Service Centers
- Police/Fire/EMS Facilities
- Corridor Capacity Preservation Areas
- Ag Preservation Districts
- Green Infrastructure
- Parklands
- Municipal and County certified comprehensive plans



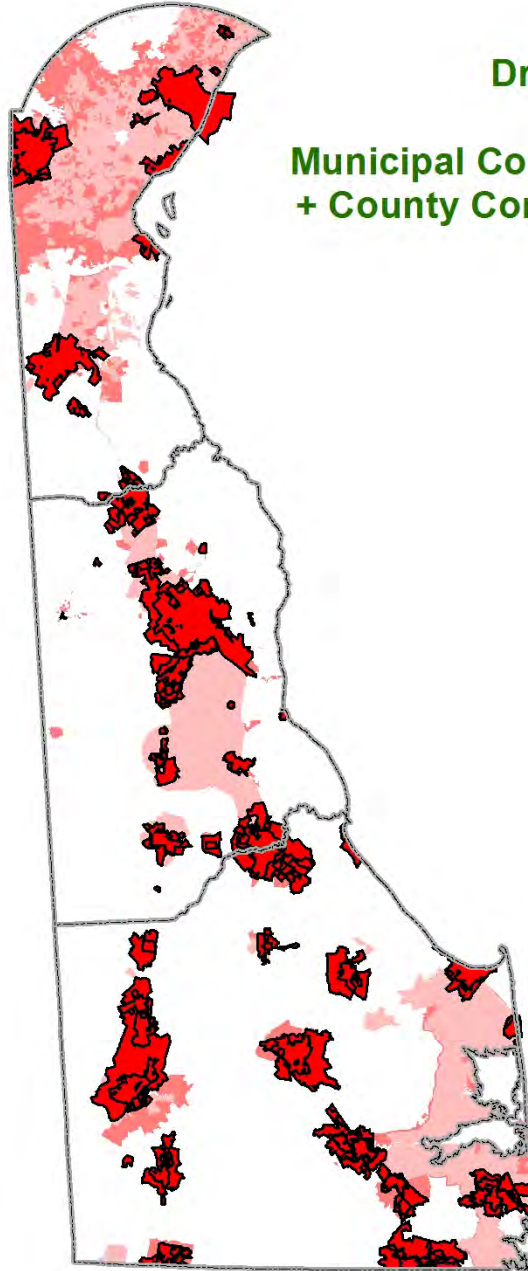
Draft 2015

Municipal Comprehensive Plans

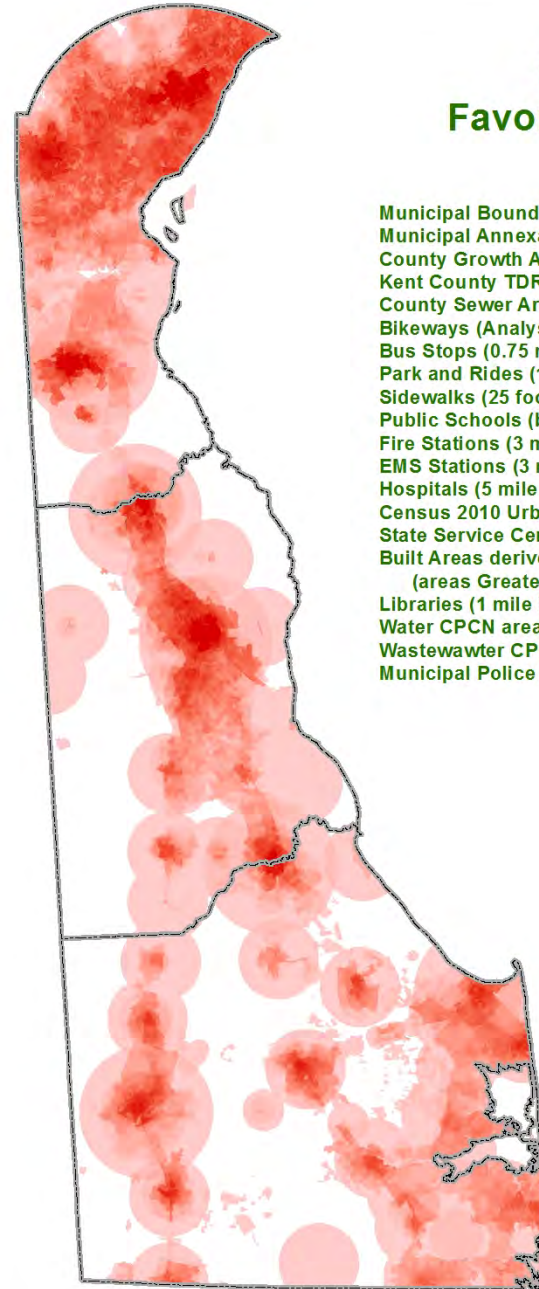


Draft 2015

**Municipal Comprehensive Plans
+ County Comprehensive Plans**

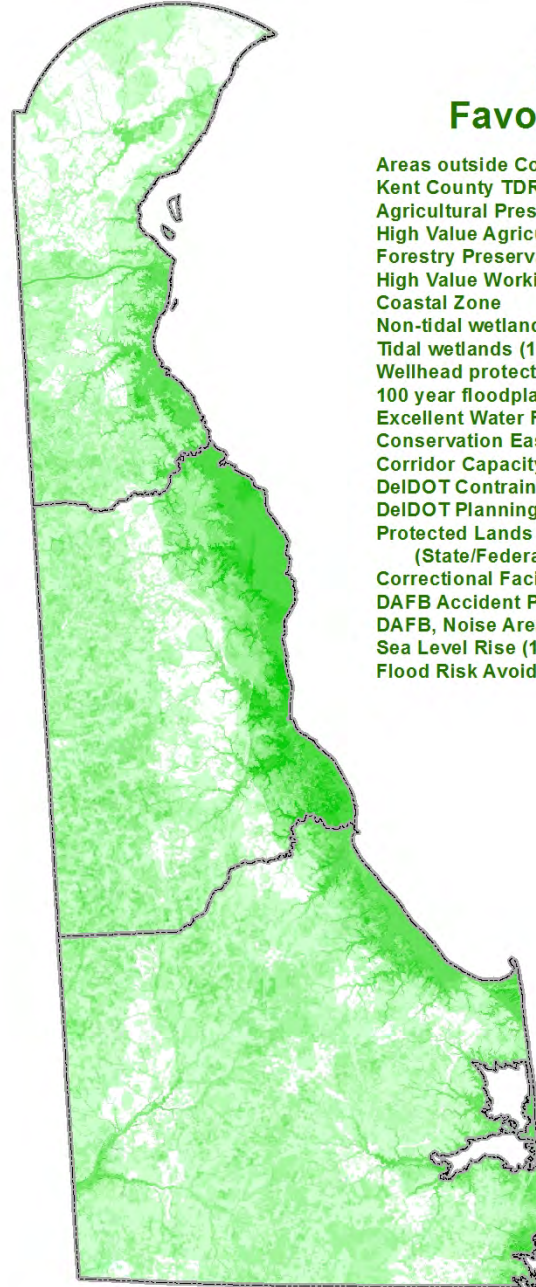


2015 DRAFT Favoring Development



Municipal Boundaries
Municipal Annexation Areas (Comprehensive Plans)
County Growth Areas (Comprehensive Plans)
Kent County TDR Receiving Areas
County Sewer Areas
Bikeways (Analysis from State Parks)
Bus Stops (0.75 mile buffer)
Park and Rides (1 mile buffer)
Sidewalks (25 foot buffer)
Public Schools (buffered)
Fire Stations (3 mile buffer)
EMS Stations (3 mile buffer)
Hospitals (5 mile buffer)
Census 2010 Urban Areas
State Service Centers (2 mile buffer)
Built Areas derived from 2012 LULC
(areas Greater than 350 contiguous acres)
Libraries (1 mile buffer)
Water CPCN areas (within Growth Zones)
Wastewater CPCN (within Growth Zones)
Municipal Police Agencies

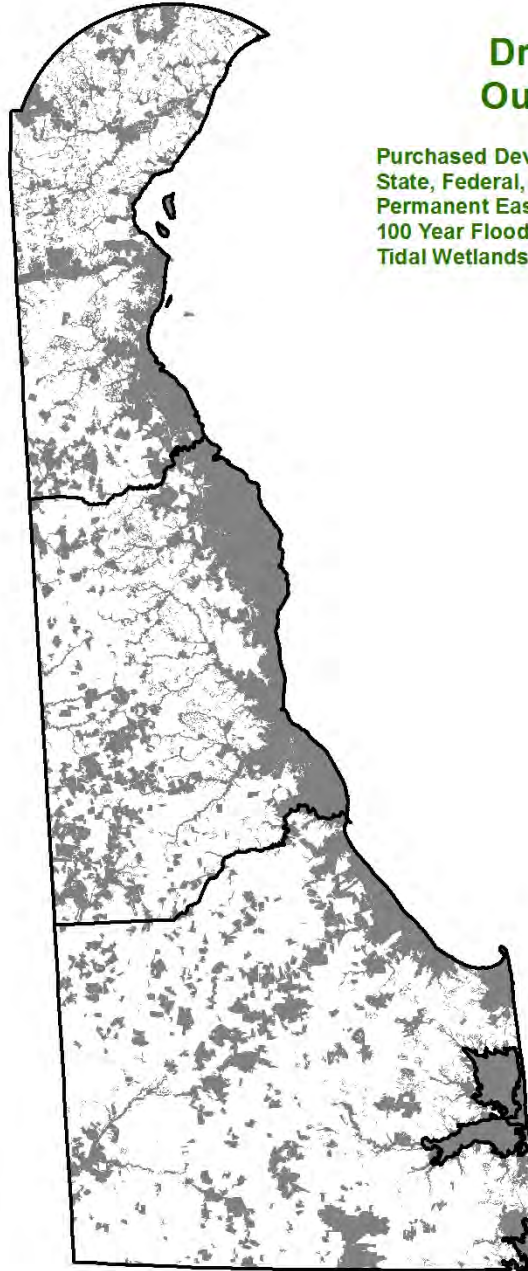
2015 DRAFT Favoring Preservation

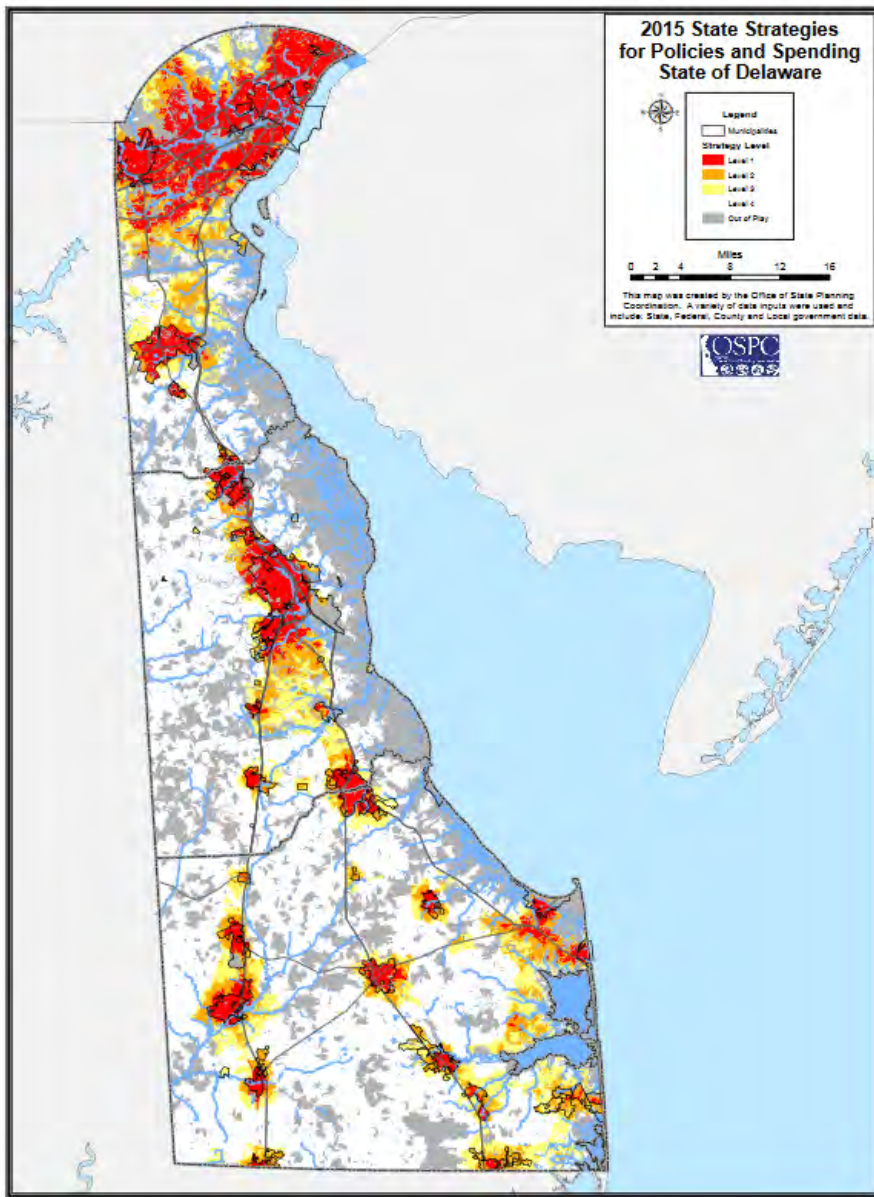


Areas outside County Growth areas
Kent County TDR sending areas
Agricultural Preservation Districts
High Value Agricultural Lands
Forestry Preservation areas
High Value Working Forest Lands
Coastal Zone
Non-tidal wetlands (100 foot buffer)
Tidal wetlands (100 foot buffer)
Wellhead protection areas
100 year floodplain
Excellent Water Recharge Areas
Conservation Easements
Corridor Capacity Preservation Parcels (owned)
DeIDOT Constraints
DeIDOT Planning Priority Area (Kent Co., east of Route 1)
Protected Lands
(State/Federal/Municipal Owned and Public Open Space)
Correctional Facilities (1 mile buffer)
DAFB Accident Potential Zones (APZ)
DAFB, Noise Areas/AICUZ
Sea Level Rise (1.0 meter scenario)
Flood Risk Avoidance Map (FRAM)

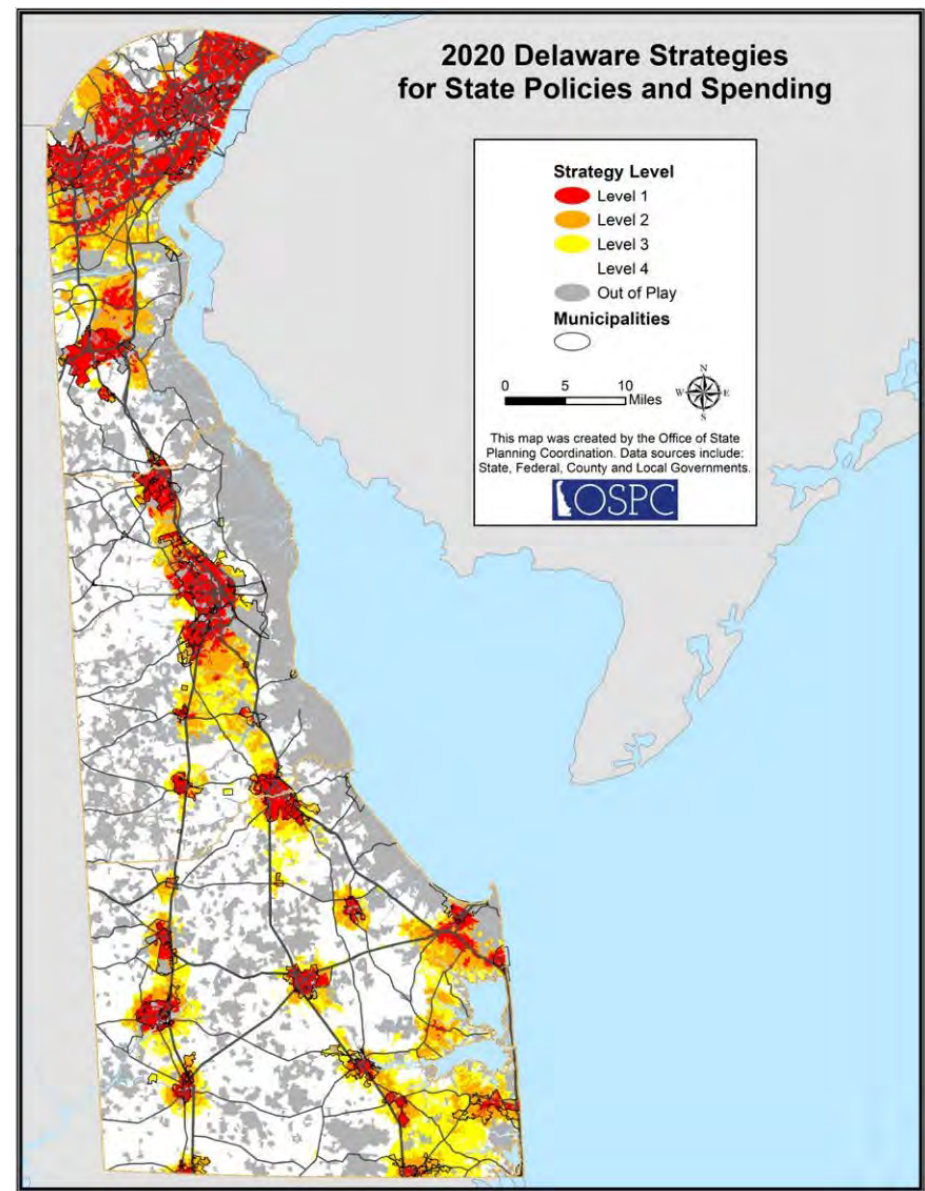
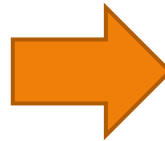
Draft 2015 Out of Play

Purchased Development Rights (PDR)
State, Federal, Local Publicly owned lands
Permanent Easements
100 Year Floodplains (NC, KC)
Tidal Wetlands





2015 Strategies



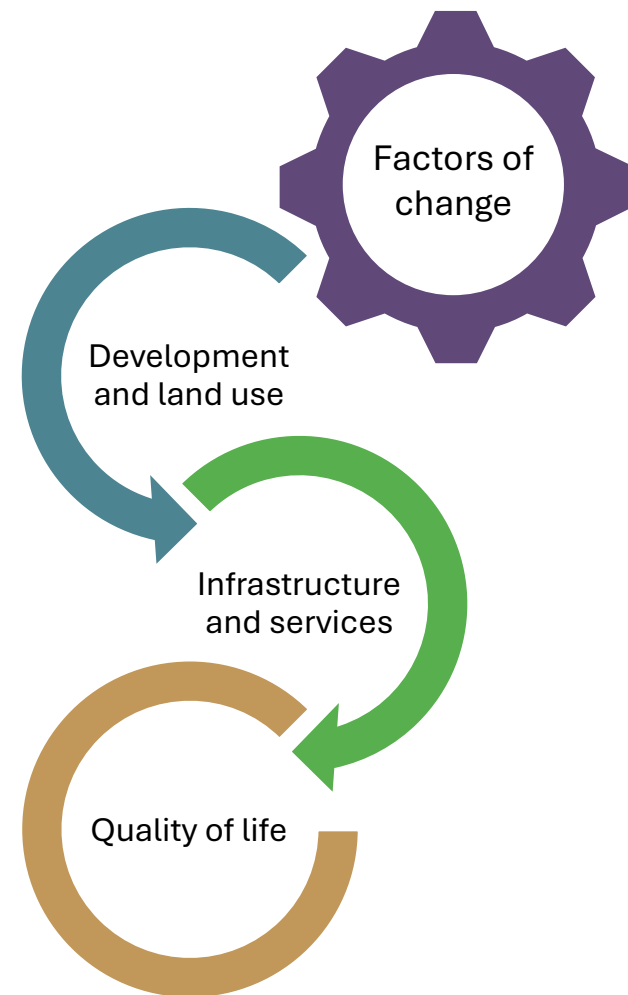
2020 Strategies



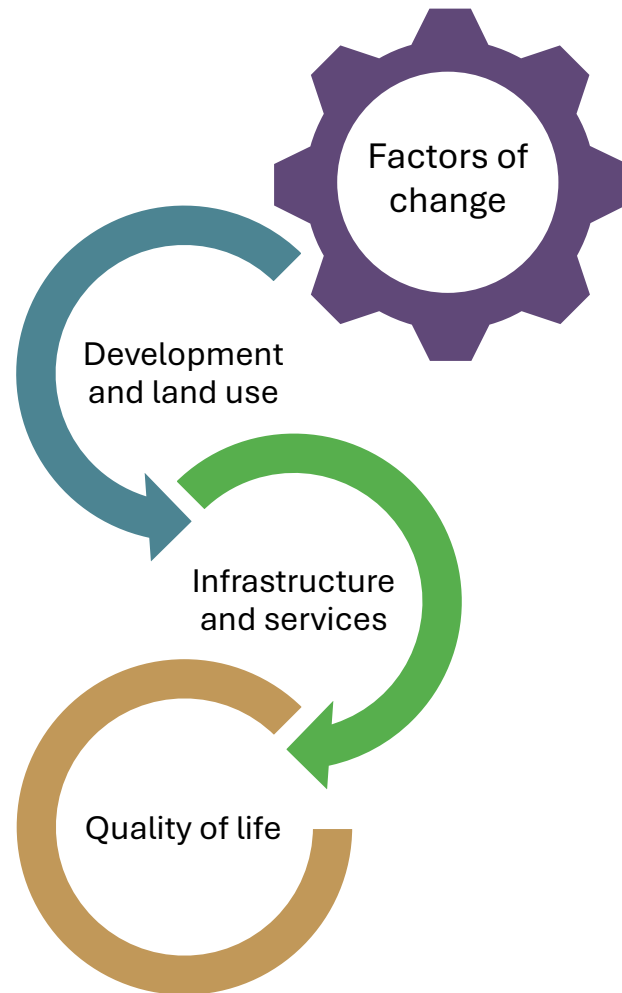
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II. Data-Backed Insights

External factors and their effects on Delaware communities



External Factors



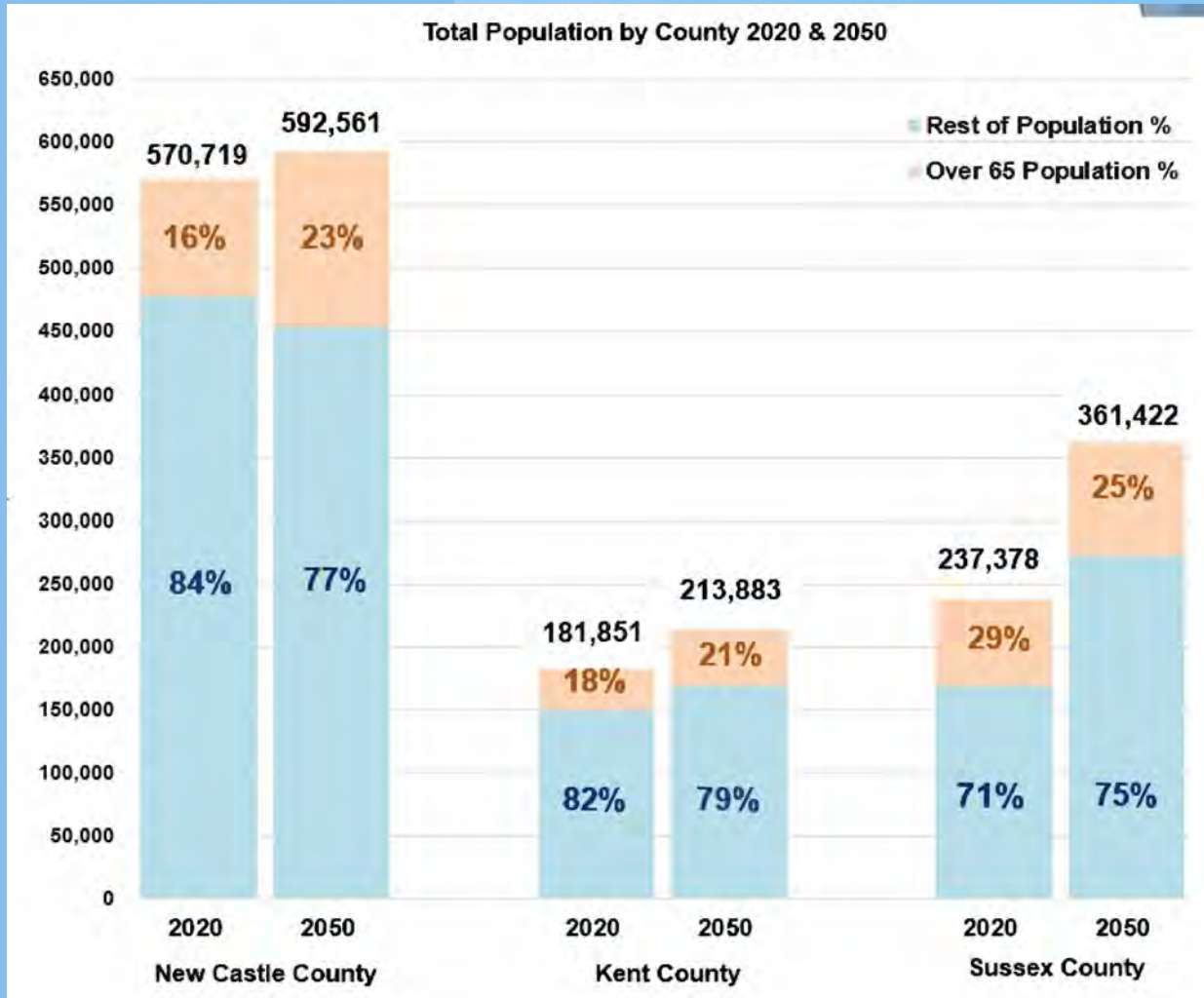
Factors Affecting Delaware



- **Real estate market demand:**
 - Lower taxes attracting influx of new residents from surrounding region
 - Especially retirees
 - Especially Sussex County
- **Technology changing work and shopping patterns:**
 - E-commerce spurring warehousing presence and logistics activity
 - Remote work changing commuting habits
- **Sea-level rise, climate change and flooding:**
 - Rising water levels on our coastal state caused by GHG emissions are causing more frequent / severe flooding, including sunny-day flooding
 - Sea levels will continue to rise and days with heavy precipitation expected to increase



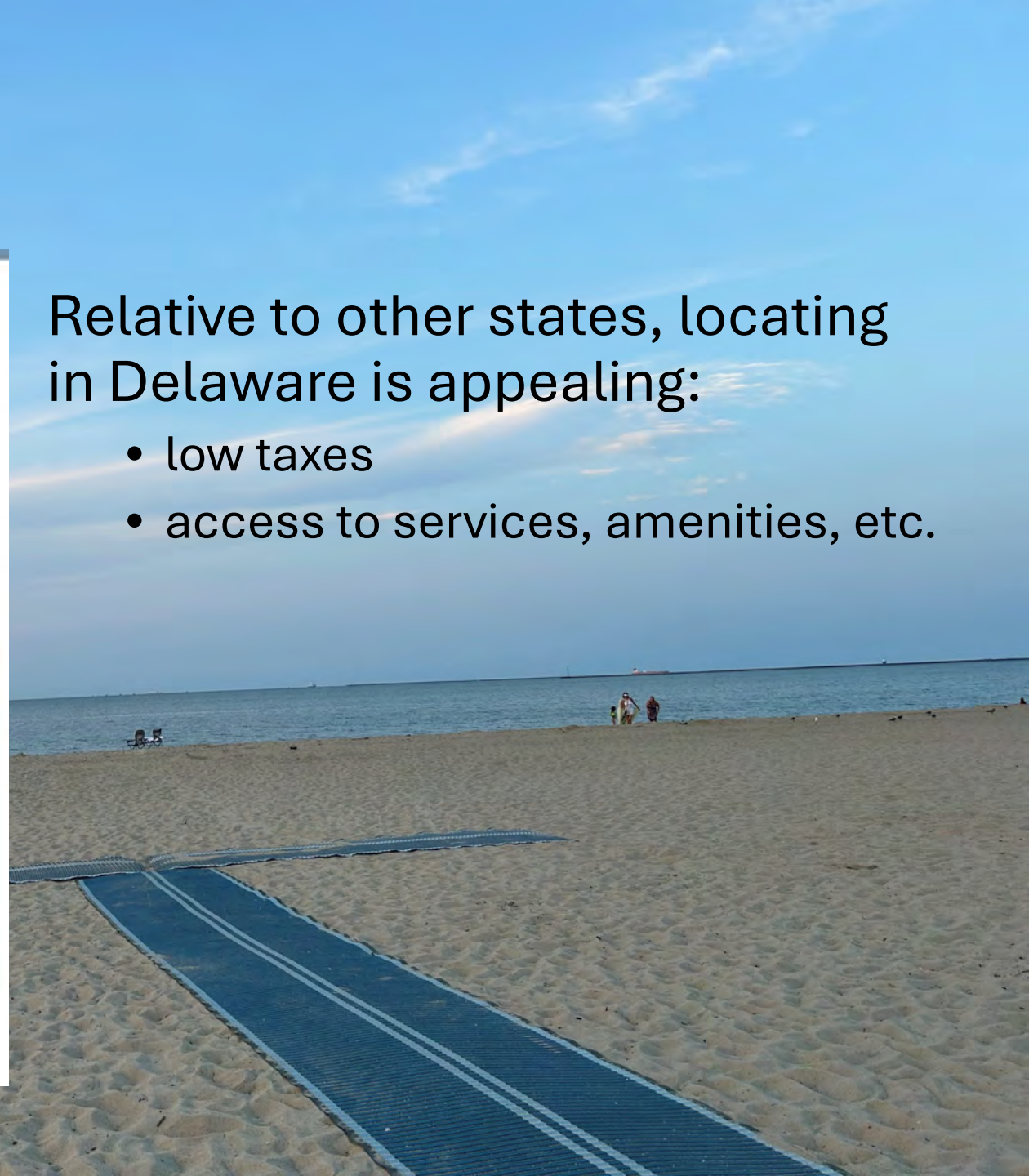
What's Going on Here?



Source: Delaware Population Consortium

Relative to other states, locating in Delaware is appealing:

- low taxes
- access to services, amenities, etc.



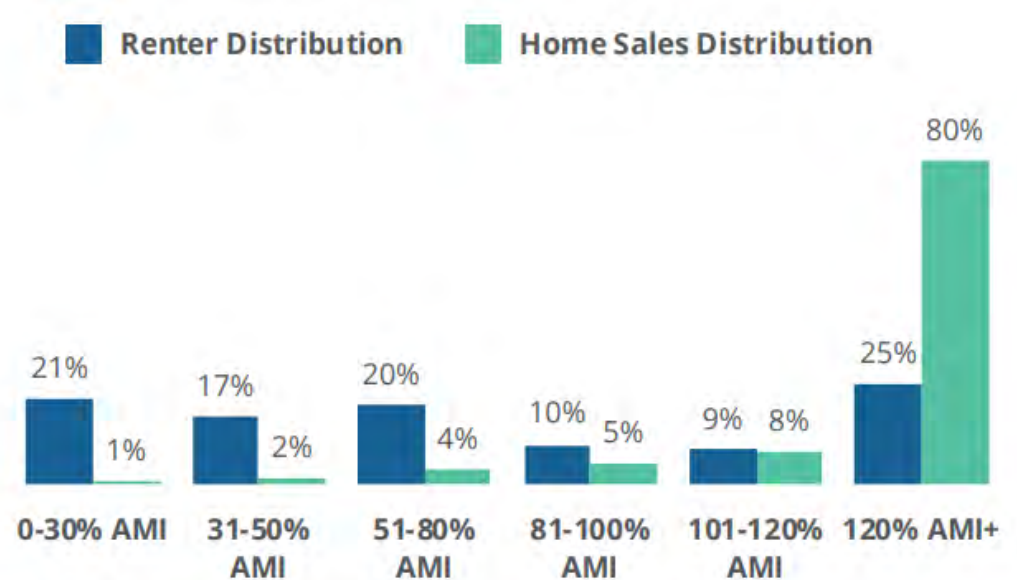
Data Insight: Demographics are Changing

- People relocating to Delaware –
 - About 27,000 net domestic migration to Delaware (2020-2022)
- Increasing share of population is older
- Demand for high-price point housing product

What are the implications?

- Mismatch in housing being provided relative to local need
- Increasingly unbalanced, feedback loop effect:
 - Housing
 - Development / land consumption
 - Essential services and infrastructure

Distribution of Home Sale Prices and Renters Who Can Afford to Buy Homes by AMI Range, 2022



Note: Assumes a 30-year mortgage at a rate of 6.5% with a 20% down payment and 25% of monthly payment is used for property taxes, utilities, and insurance.

Source: Root Policy Research, 2021 ACS 5 year estimates, and HMDA.

Data Insight: Development and Land Use

- Sprawl
- Uniform housing
- Warehousing/logistics

What are the implications?

- Inefficiencies and rising costs to provide the infrastructure
- Associated impacts:
 - Increasing motor vehicle traffic and vehicle miles traveled
 - Affordable housing (living) challenges
 - Environmental degradation (forest, ecosystem, water, etc.)
 - Risk (in light of climate change)
 - “Crowding out” of industry, farming

Residential Building Permits

12,981

Total Units - Level 4

Non-residential Building Permits

2,288,442

Sq. Feet - Level 4

Residential Dev Apps

5,652

Total Units - Level 4

Non-residential Dev Apps

402,286

Sq. Feet - Level 4

Residential PLUS Projects

16,304

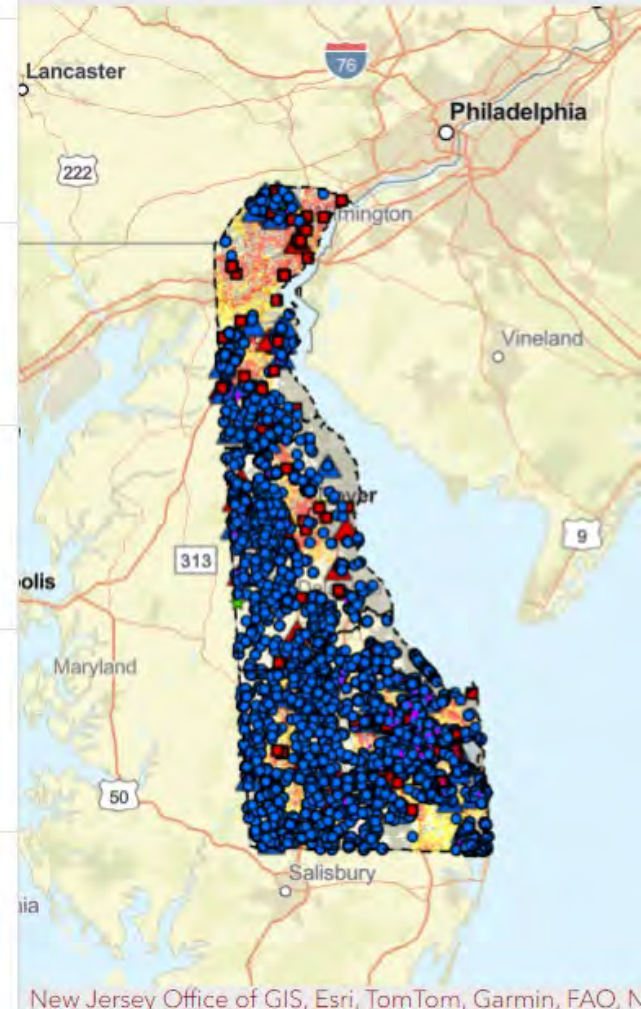
Total Units - Level 4

Non-residential PLUS Projects

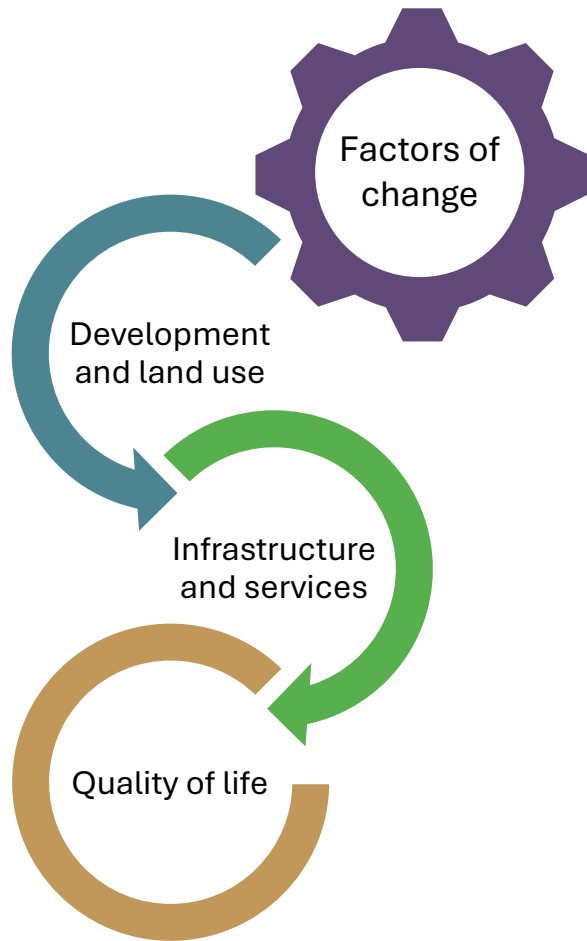
1,726,328

Sq. Feet - Level 4

Development Trends in Strategy Level 4



Adapting to Factors of Change



State can't control the external factors, but:

- Collaborates with local authorities on development and land use
 - Monitoring change (eyes on horizon)
 - Planning support (comprehensive plans)
 - PLUS process (provide support and insights on project basis)
- Monitors, plans, budgets/programs, provides infrastructure and services

...and inasmuch works to support communities across the state toward high quality of life





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Data Analysis Workgroup

III. Further Into the Data

A closer look at trends, implications, and finding ways to adapt...

Transportation

Environment

Economy

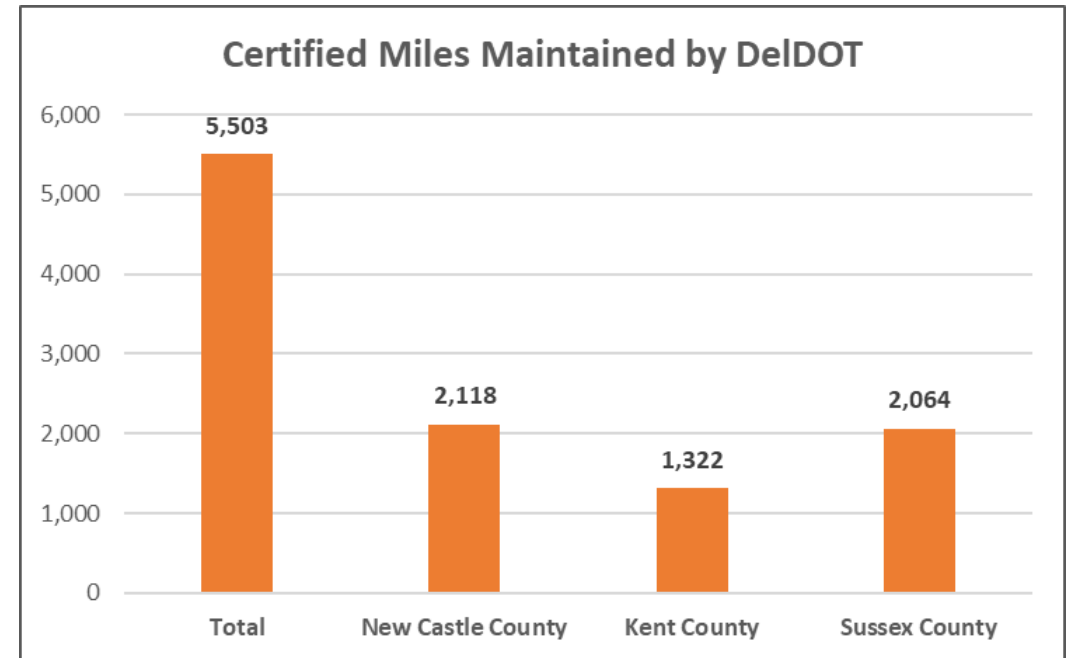
Housing

Transportation

Delaware DOT manages 89%
(national average of state-maintained roads: 20%)

Trends:

- Costs for infrastructure rising
- Funding forecasts trending down
- Frequently flooded roadways - 250 road segments were prioritized based on flood risk and several other factors (AADT, evacuation routes, essential facilities, etc.)
- Transit is evolving



*HPMS certified miles, or Certified Public Mileage (CPM), are the total length of a state's public roads as certified by the state's governor.



Market reviews (2010-2030)

Transportation

Transportation Improvement Districts (TID) – a proactive, collaborative approach to planning / funding transportation infrastructure.

14 TIDs statewide

Forecasted development in TIDs:

- 74k residential units
(over two times Wilmington or 100 times Cheswold)
- 40 million non-residential square feet
(nearly 40 Christiana Malls or 100 warehouses)

Over \$1 Billion in projects identified

(includes 2 of 7 TIDs currently under development)

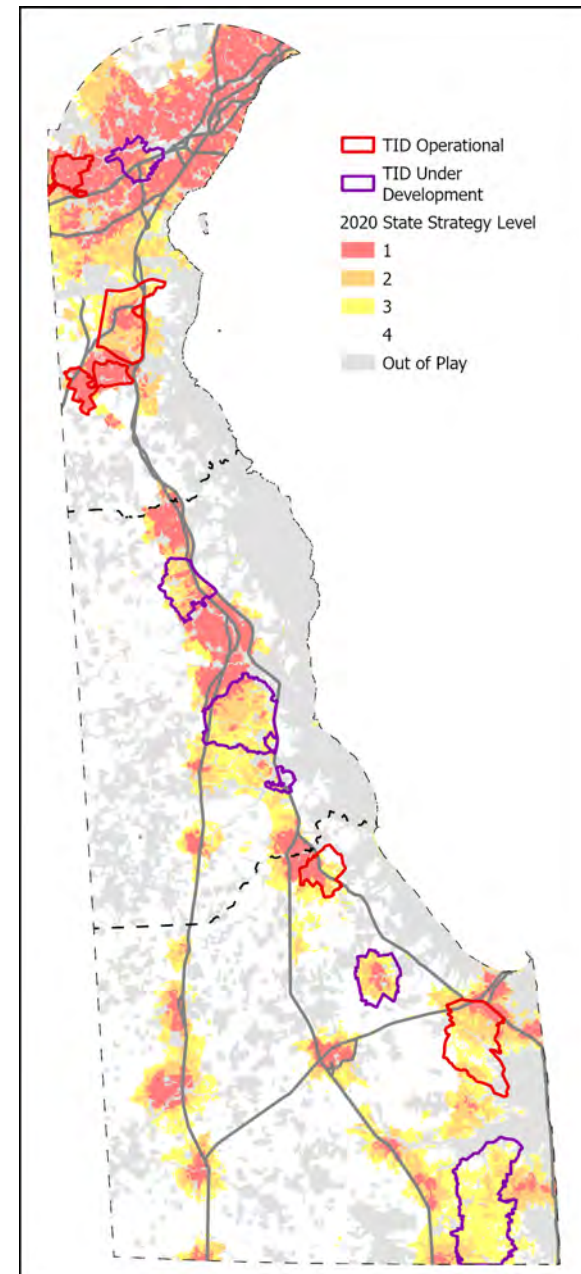
TID Operational

- Newark
- Southern New Castle County
- Westtown
- Eastown
- SE Milford
- Henlopen

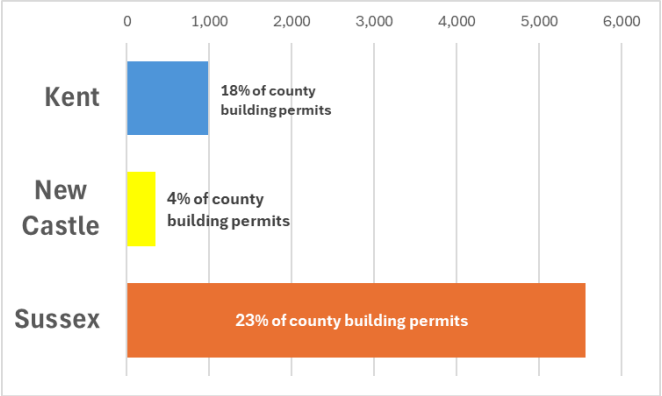
TID Under Development

- Little Heaven
- South Frederica
- Cheswold Area
- Magnolia
- Milton
- Roxana Area
- Churchman's Crossing

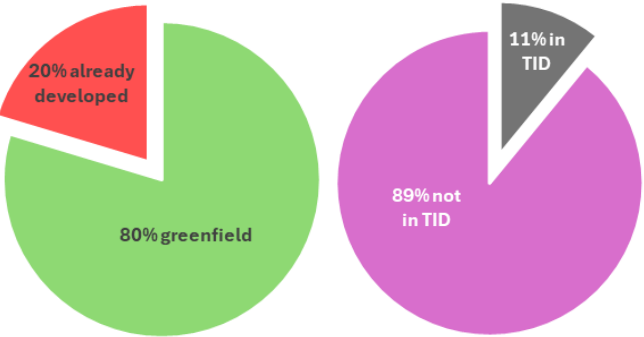
Municipalities



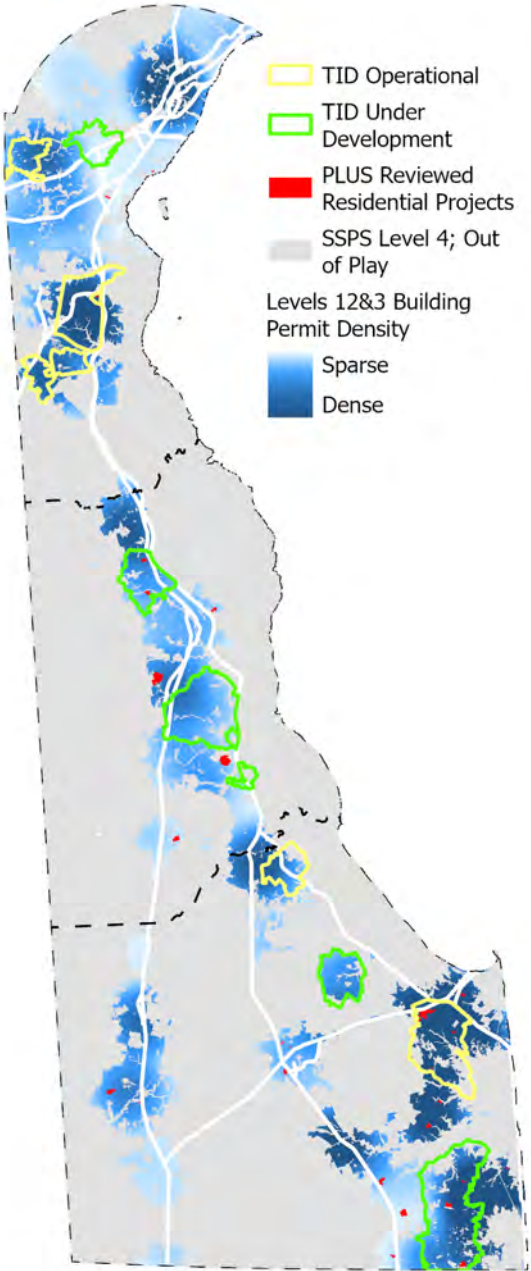
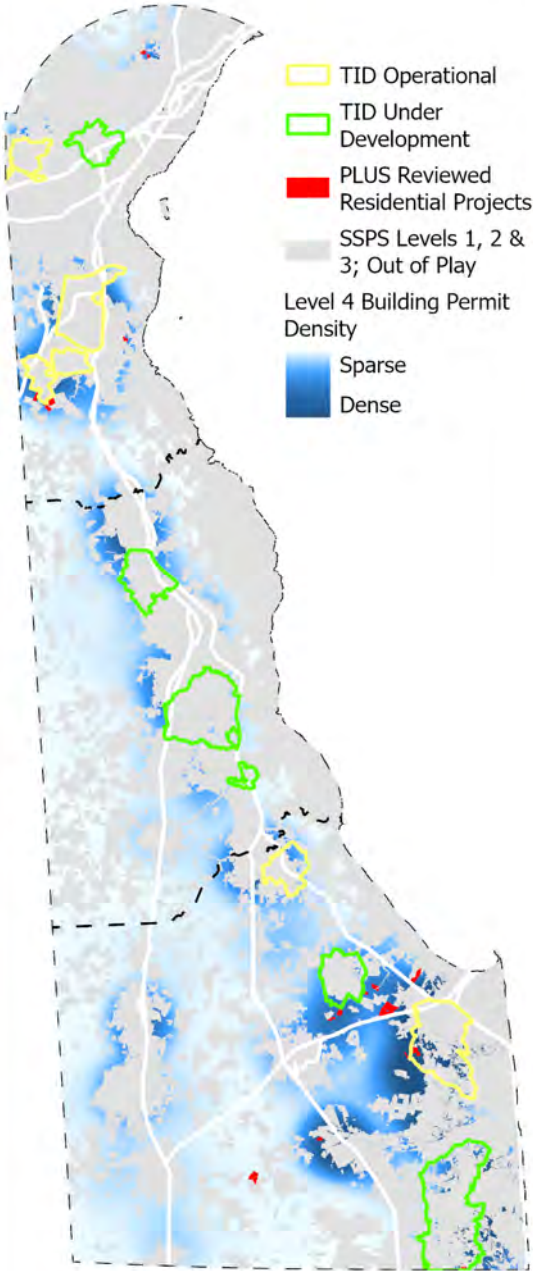
Development Trends in
Strategy Level 4



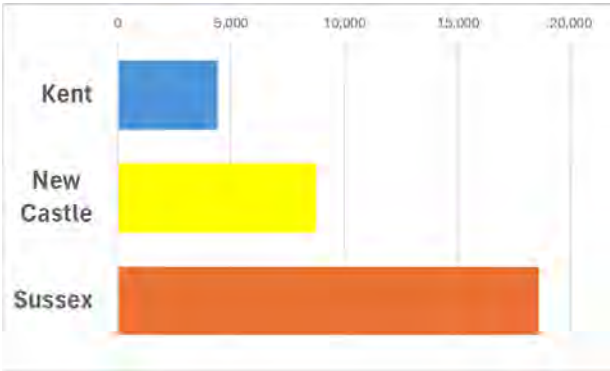
Building Permits Level 4:
6,886 residential units (18%)
765,659 non-residential sqft (3%)



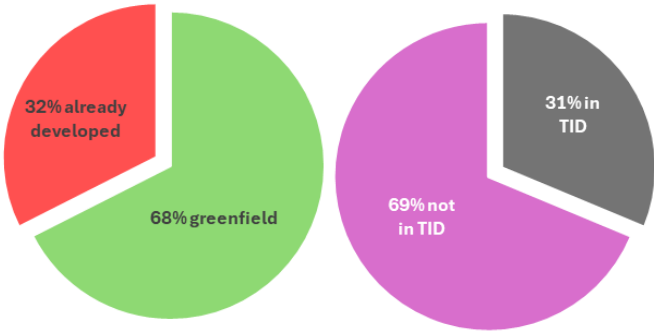
Reviewed PLUS Dev't Level 4:
8,685 residential units (46%)
814,100 non-residential sqft (13%)



Development Trends in
Strategy Levels 1, 2 and 3



Building Permits Level 1,2&3:
31,751 residential units (82%)
25.5M non-residential sqft (97%)

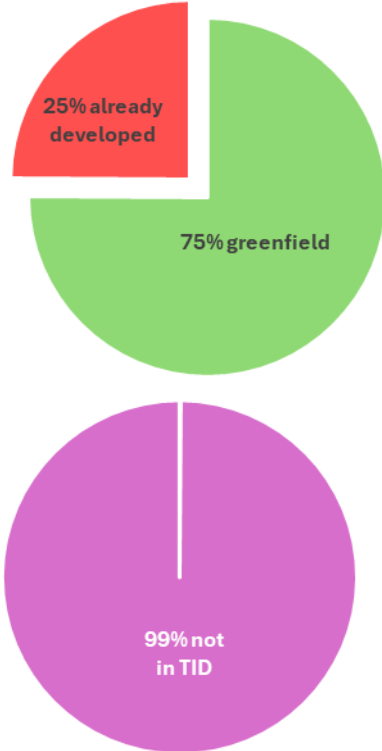


Reviewed PLUS Dev't Level 1,2&3:
10,353 residential units (54%)
5.4M non-residential sqft (87%)

*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

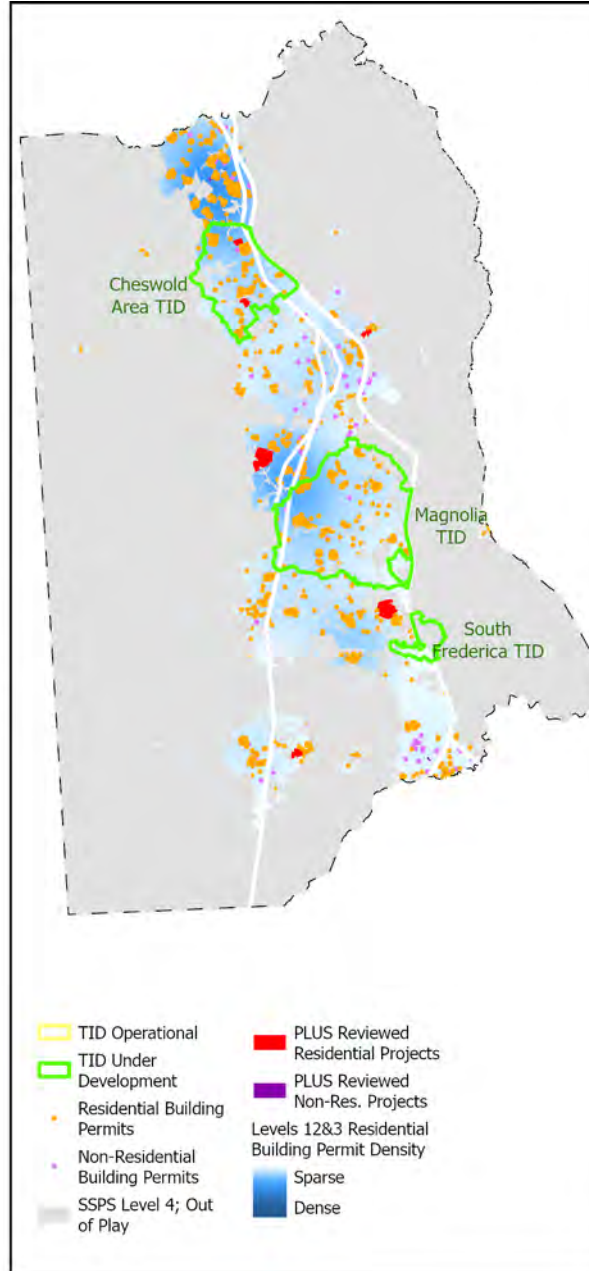
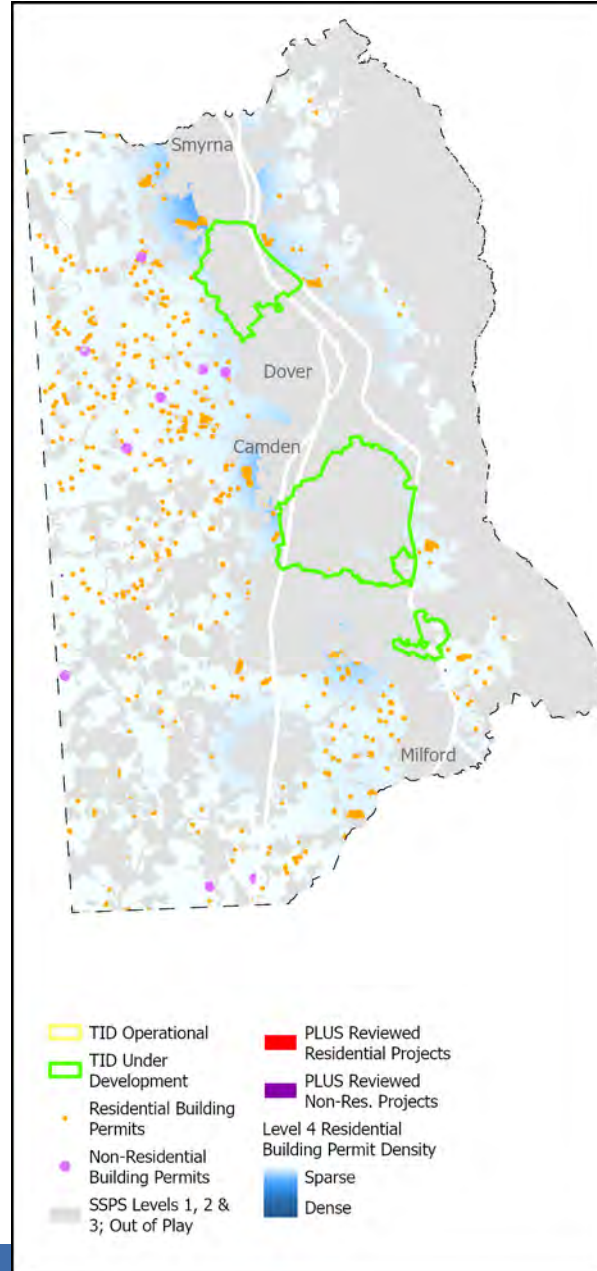
Development Trends in Strategy Level 4

Building Permits Level 4:
984 residential units (18%)
135,140 non-residential sqft (5%)



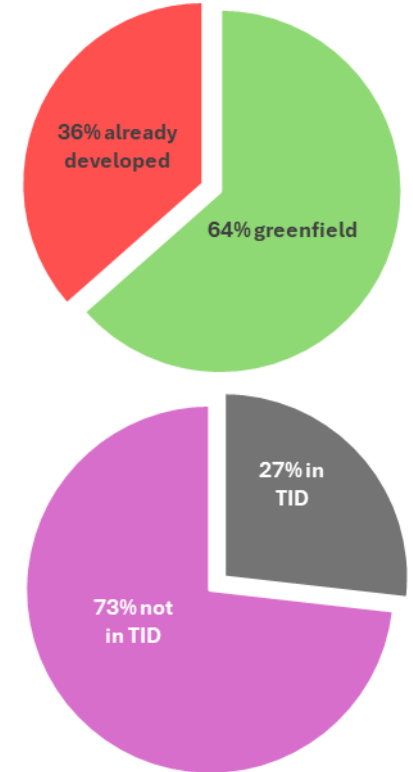
Reviewed Plus Dev't Level 4:
0 residential units (0%)
78,575 non-residential sqft (21%)

KENT COUNTY



Development Trends in Strategy Levels 1, 2 and 3

Building Permits Level 1,2&3:
4,414 residential units (82%)
2.7M non-residential sqft (95%)



Reviewed Plus Dev't Level 1,2&3:
4,019 residential units (100%)
296,024 non-residential sqft (79%)

Transportation

		Dwelling Units	
Transportation Improvement District (TID)	Forecast Year	SUPPLY	DEMAND
NEW CASTLE	2040	20,697	5,667
KENT	South Frederica	0	14,851
	Little Heaven	352	
	Cheswold Area	3,735	
	Magnolia	12,119	
SUSSEX	2045	39,633	33,678
TOTAL		76,536	54,196

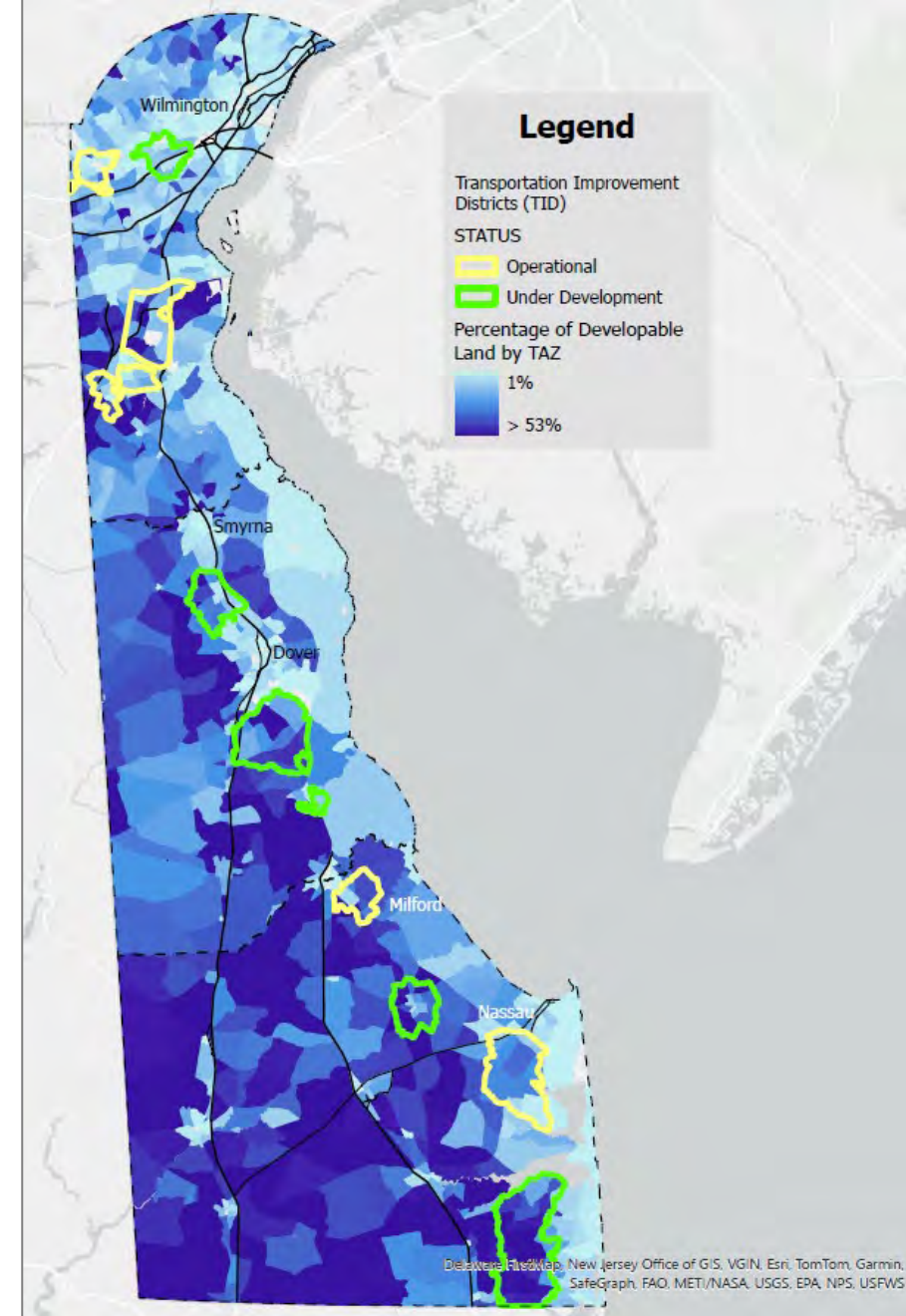
Total Land Area

—

SSPS “out of play”
 2022 LULC residential / commercial / industrial / institutional
 Wetlands
 Impervious surface (NCC)
 Manual QA/QC (i.e., remove subdivided but not yet built lots)

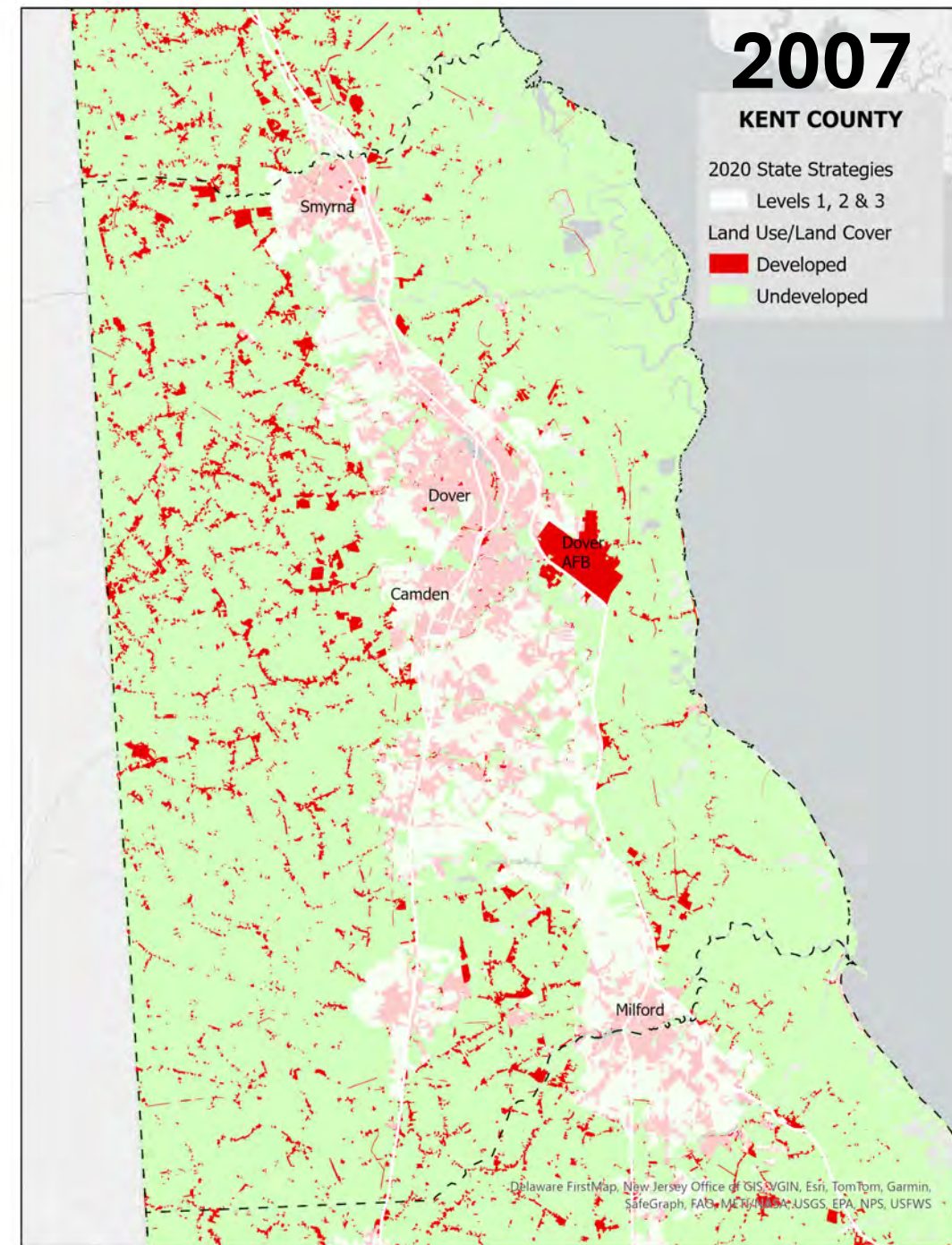
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Developable Land Area



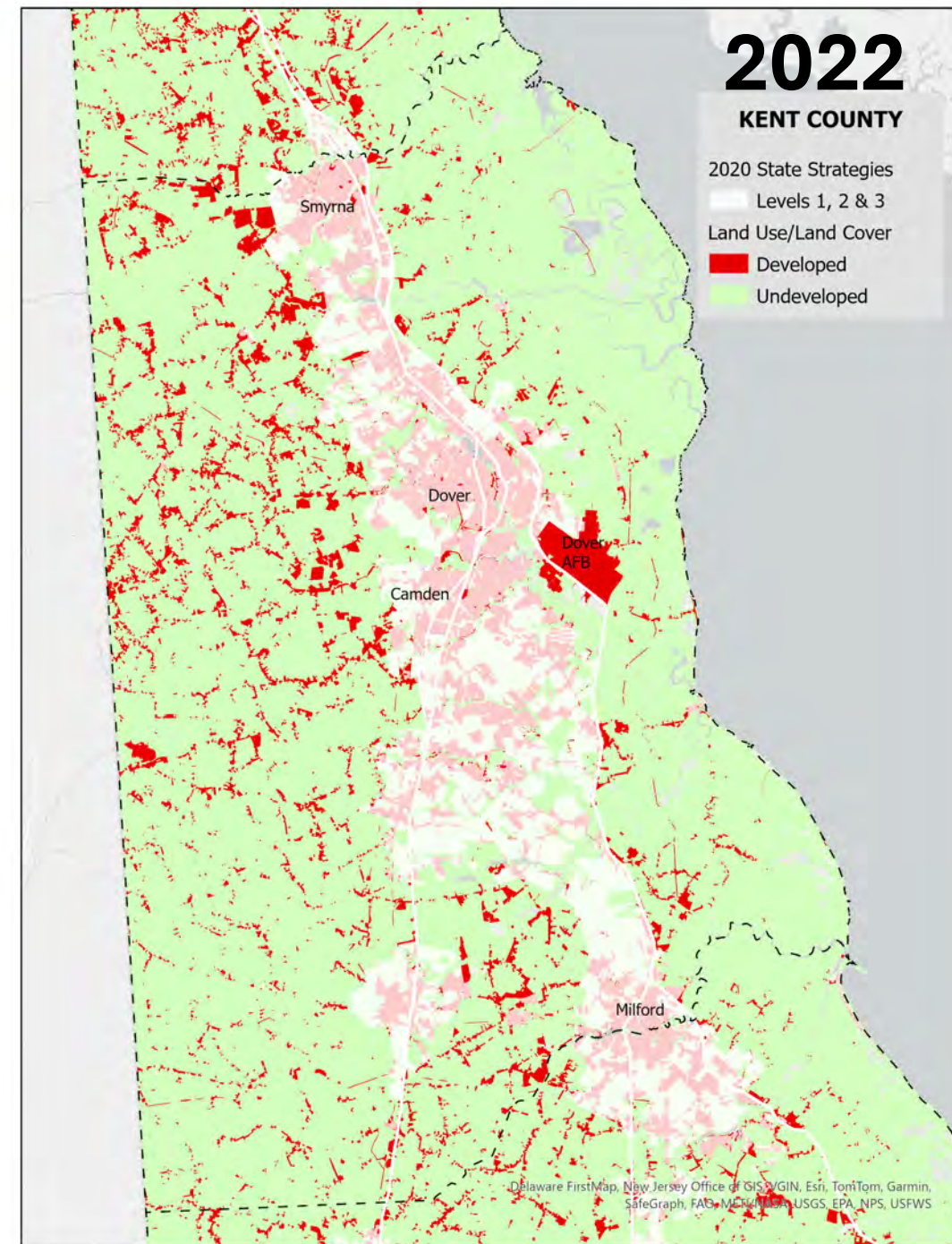
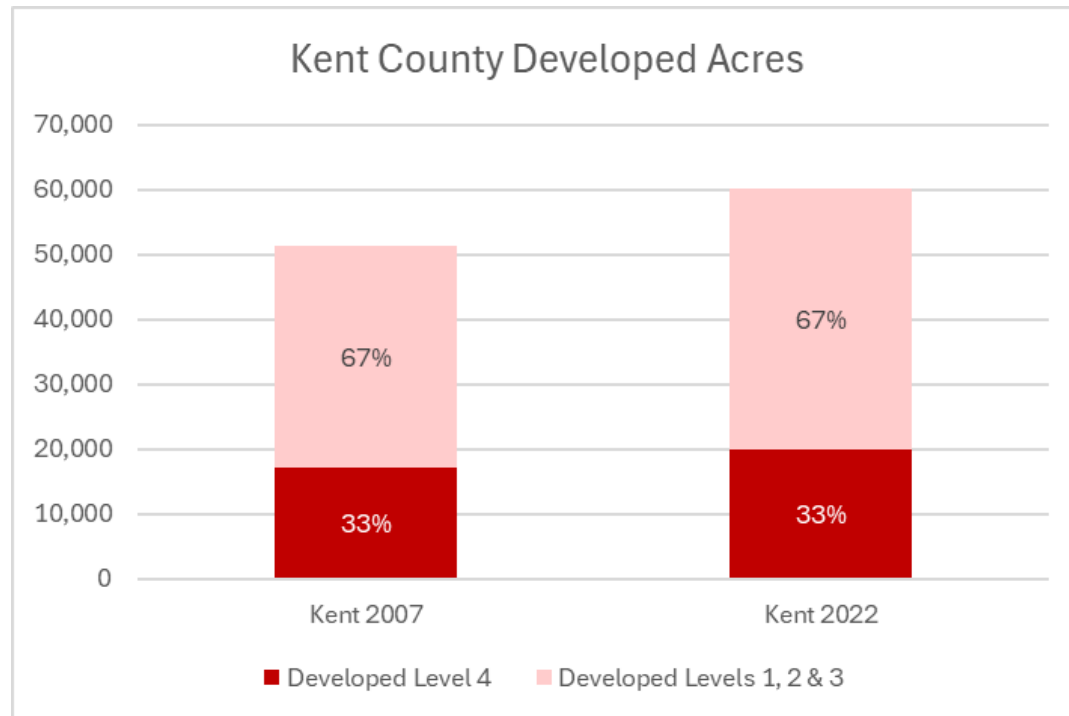
Percent of land developable (by TAZ)

Developed Land



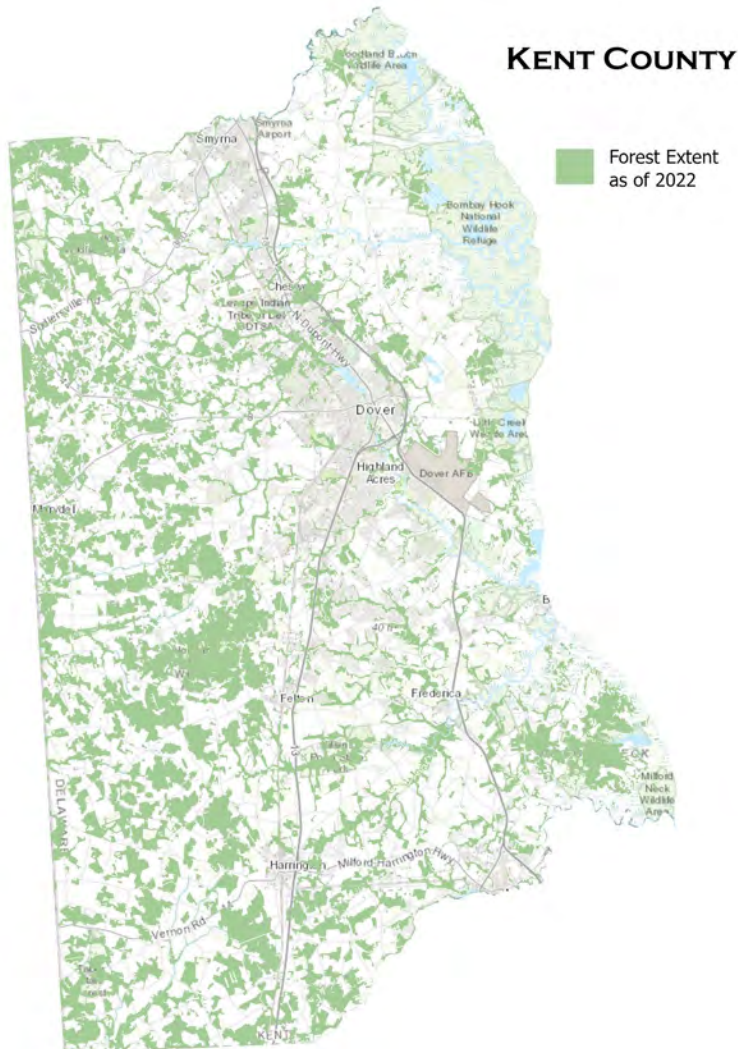
Developed Land

- Between 2007 and 2022, about 9,000 acres were developed in Kent County
- About 3,000 acres of that occurred in Level 4 areas



Environment – Land / Resources at Risk

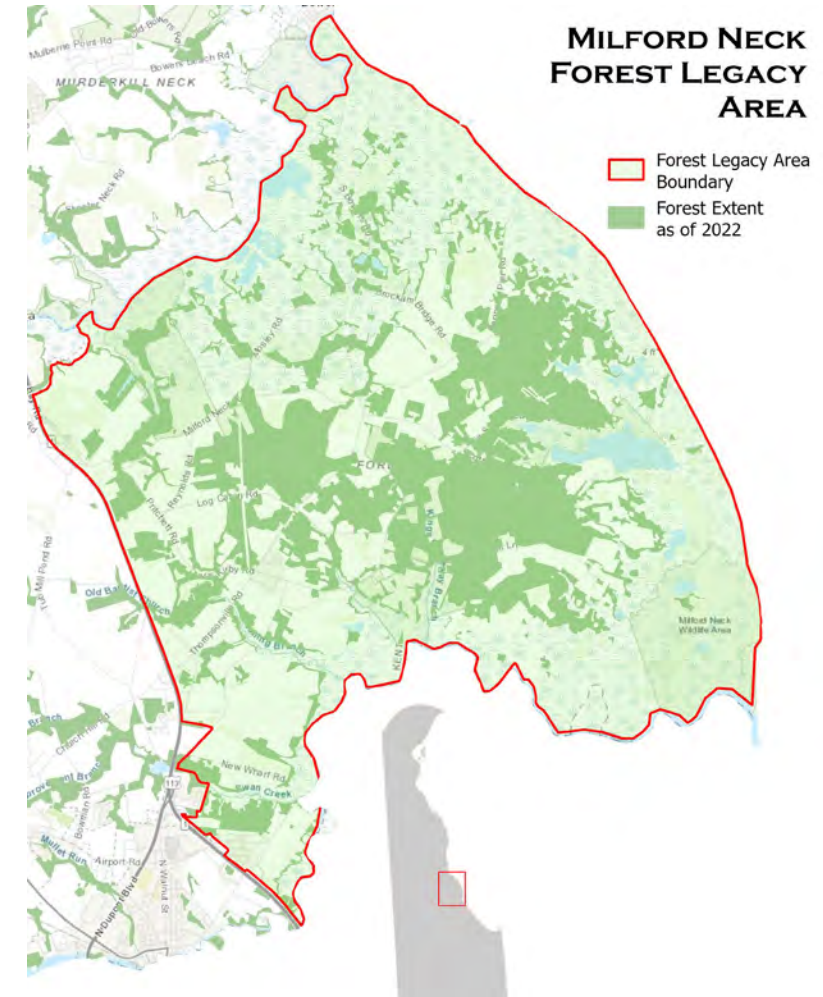
Delaware Statewide Forest Strategy



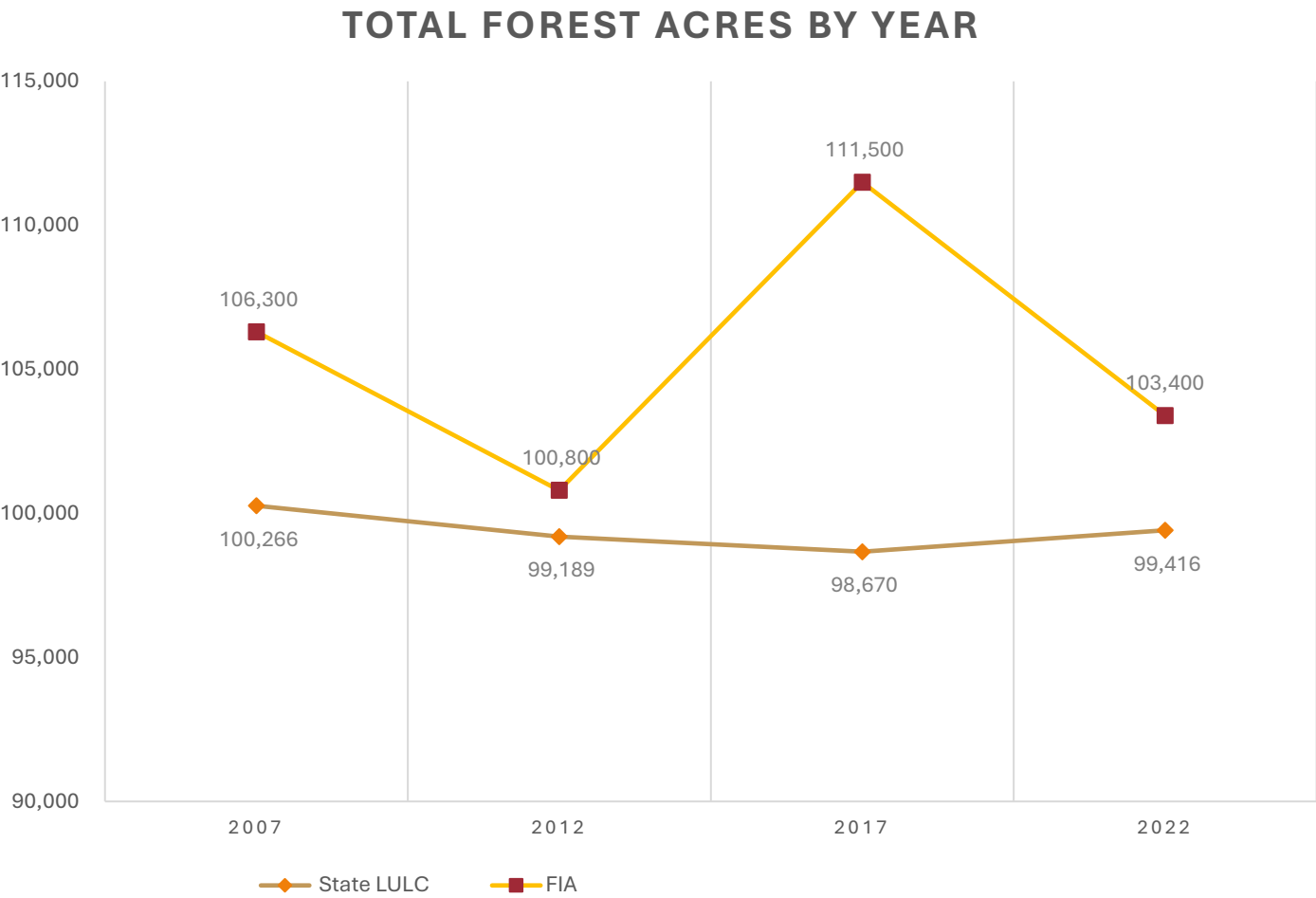
First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands



Environment – Land / Resources at Risk

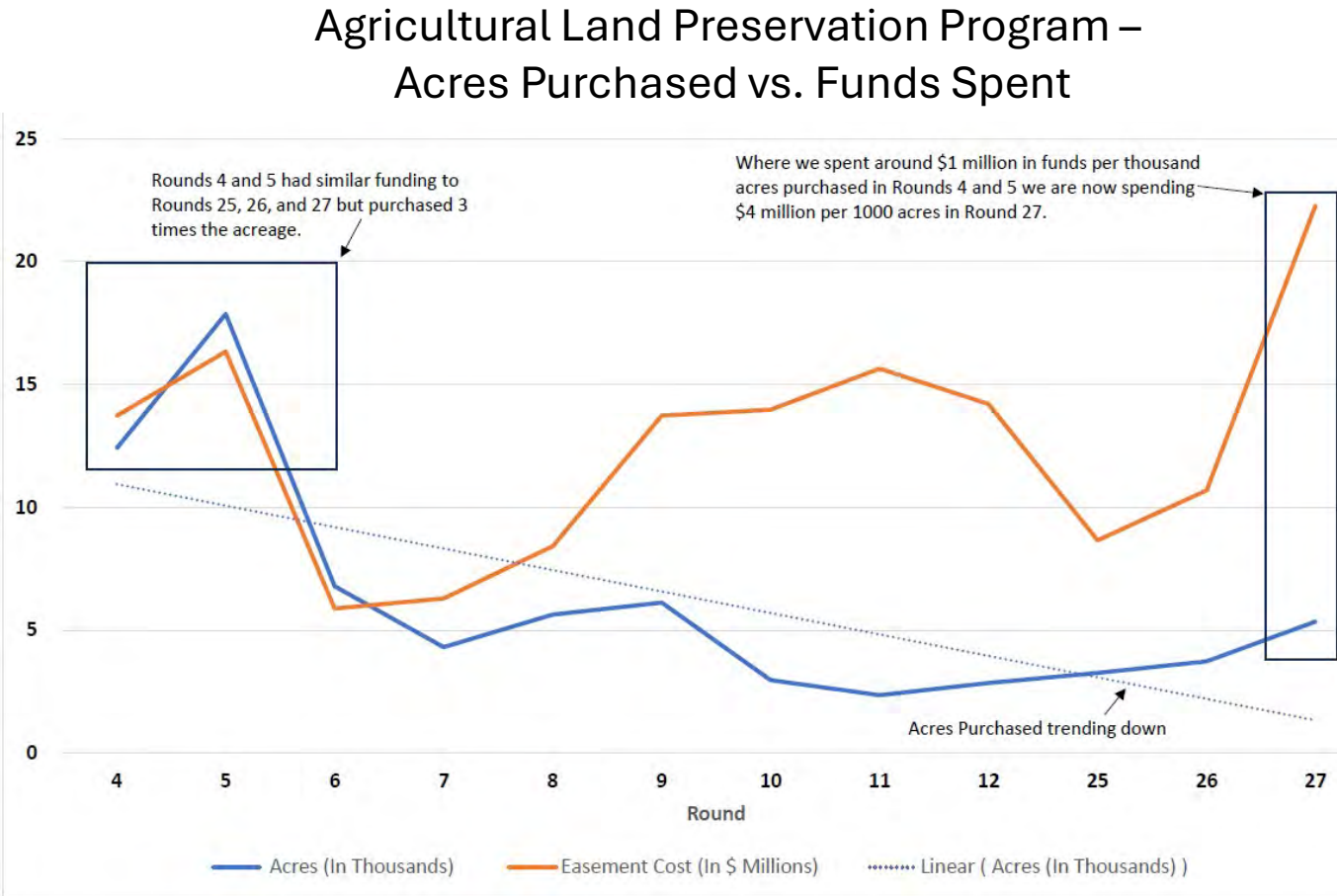
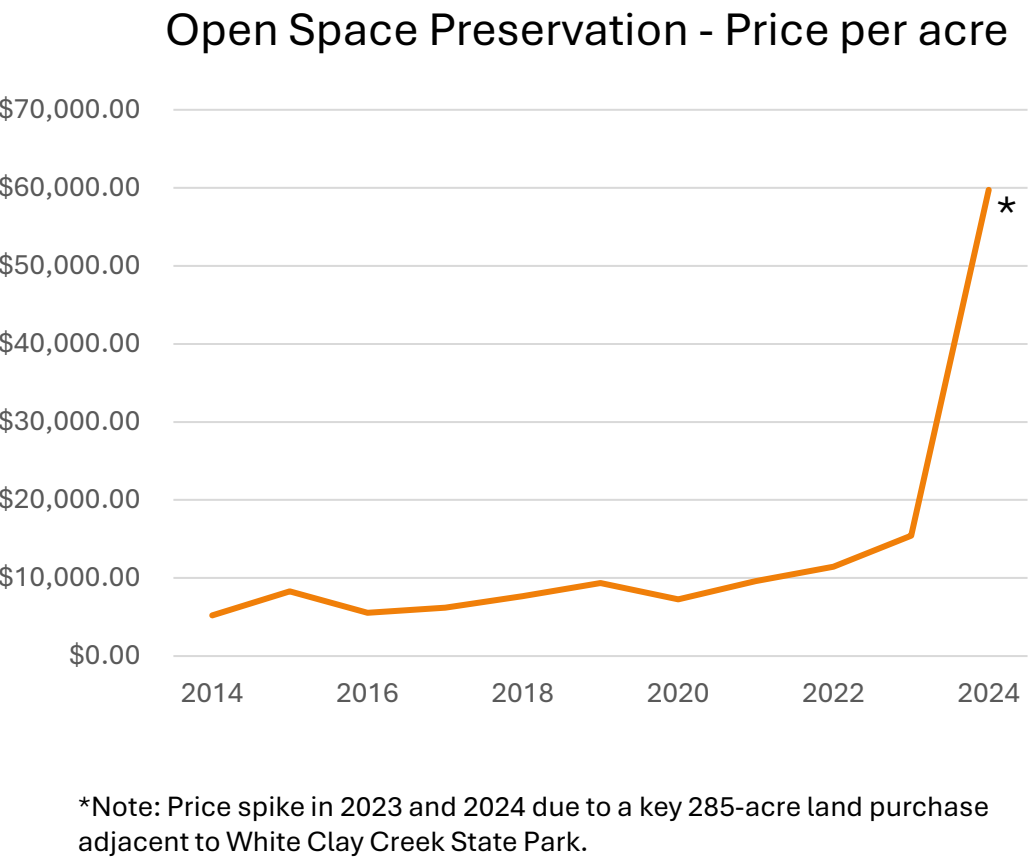


Land Use Land Cover data

LULC – Land Use Land Cover

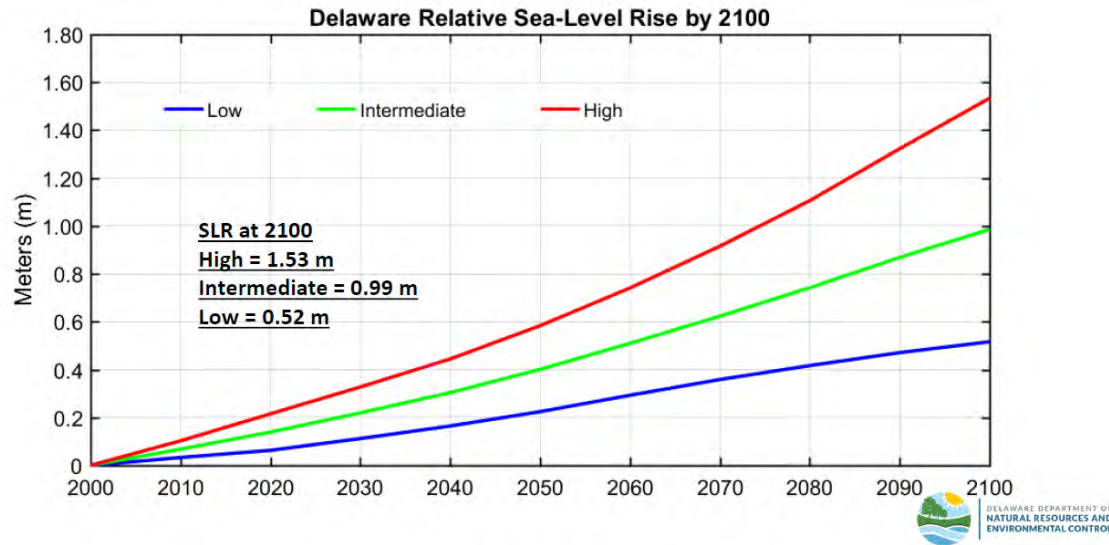
FIA - Forest Inventory and Analysis

Environment – Preservation Efforts and Challenges



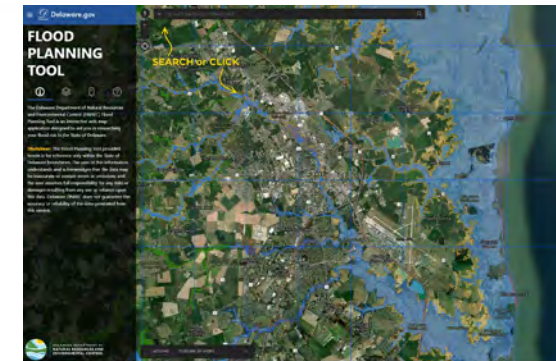
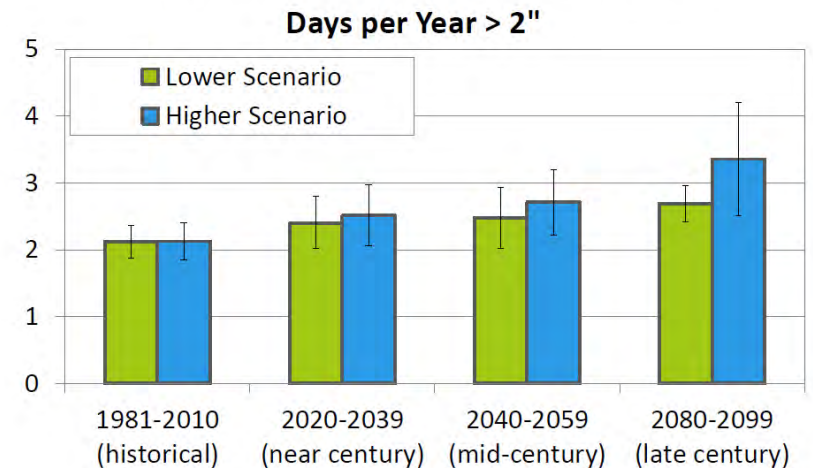
Environment – Resiliency and Adaptation

Sea Levels will continue to rise



- Marsh migration
- Saltwater intrusion
- Coastal development and infrastructure
- Accessibility – regular travel, emergency, and evacuation

Days with very heavy precipitation are expected to increase



Economy – Industry and Economic Development

- Current industries:

Delaware total jobs: 625,328

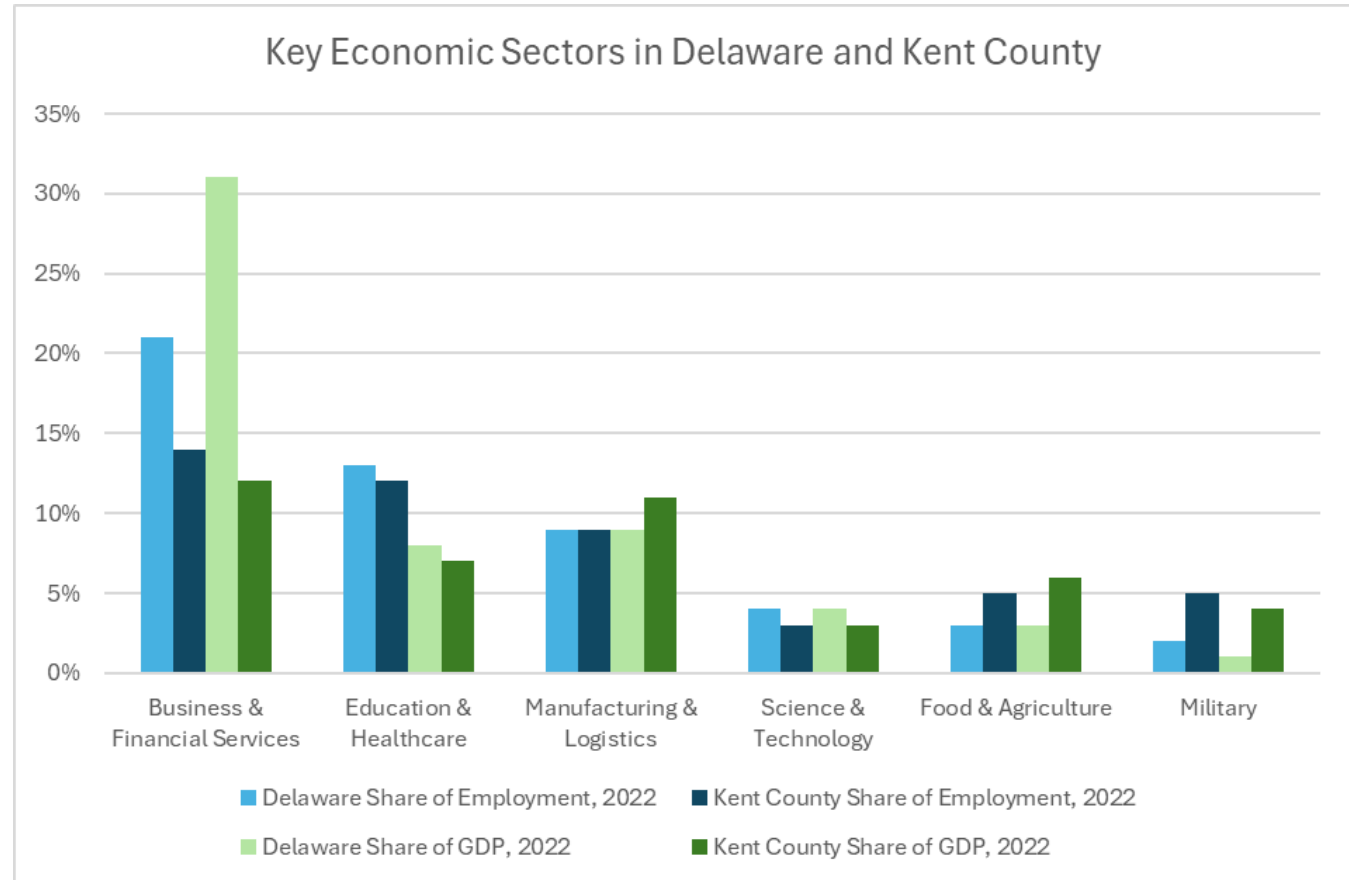
Kent County total jobs: 97,397

Delaware total GDP: \$90.4 billion

Kent County GDP: \$10.4 billion

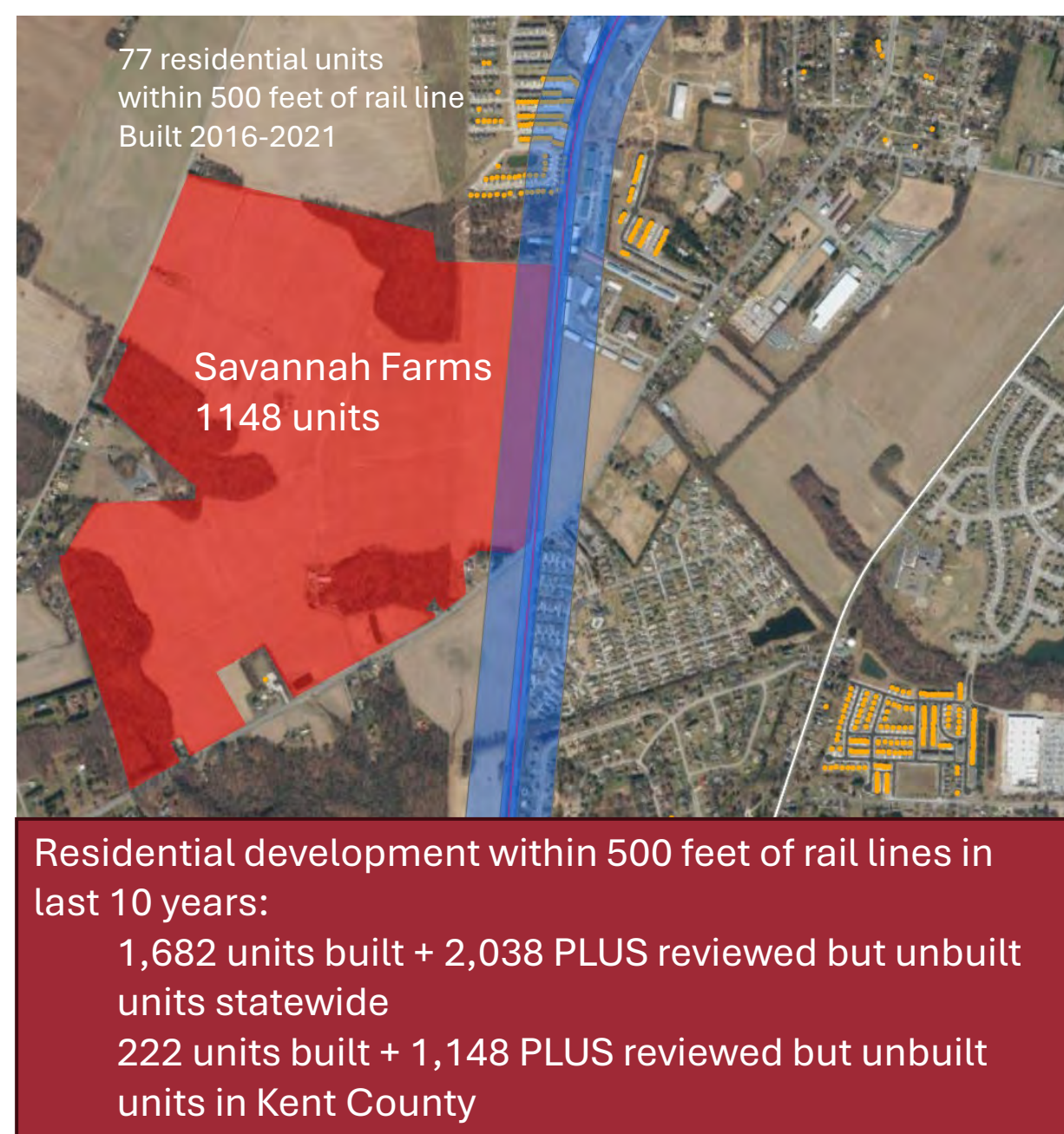
- Future industries?

- Aviation and enhanced logistics?
- Green jobs and alternative energy?
- Life sciences and advanced industries?



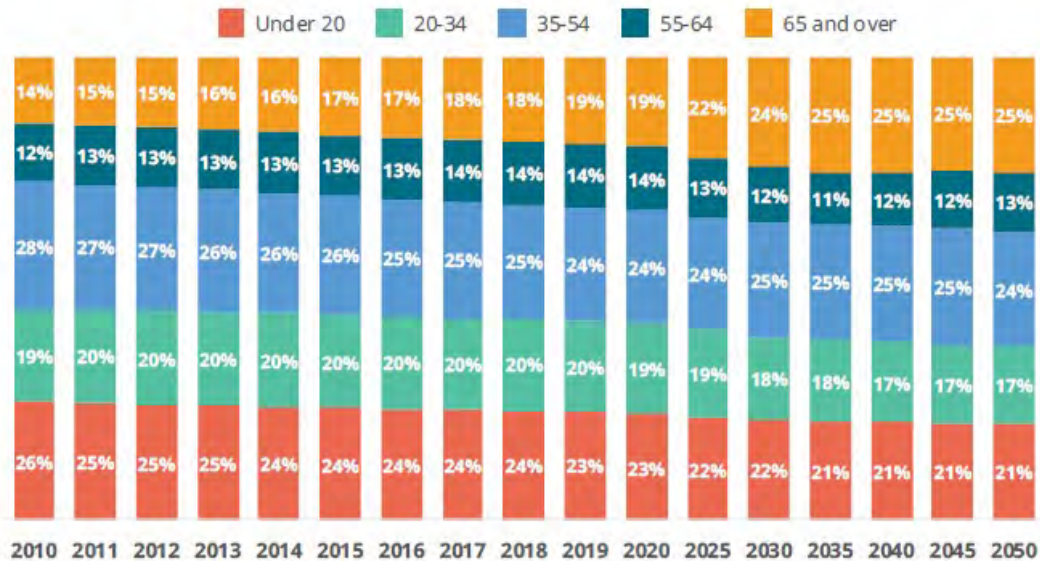
Economy – Concerns

- Land conversion
- Physical space needs
- Nuisance issues
- Freight / transport concerns



Economy – Workforce

Population Projections by Age, Delaware, 2010 - 2050



- Labor force participation rate fell below national average in 2009
- Consistent decline in share of residents in prime working years may signal worker shortage.
- Low earning growth for health care and low-wage service workers may also make it difficult to maintain workforce needed to support senior healthcare needs.
- Further squeezed by housing shortage/ housing burdens

Public Assistance Trends, Kent County

Kent	2006		2022	
Total households	55,424		73,497	
With earnings	44,015	79.4%	54,752	74.5%
With Social Security	17,421	31.4%	26,480	36.0%
With retirement income	15,124	27.3%	24,863	33.8%
With Supplemental Security Income	1,843	3.3%	5,229	7.1%
With cash public assistance income	1,850	3.3%	1,498	2.0%
With Food Stamp benefits in the past 12 months	6,183	11.2%	12,637	17.2%

Housing – Statewide Needs

 **Root Policy Research**
6740 E Colfax Ave, Denver, CO 80220
www.rootpolicy.com
970.880.1415

Delaware State Housing Authority

Statewide Housing Needs Assessment

PREPARED FOR:
Delaware State Housing Authority
Dover, DE 19901
www.destatehousing.com
888-363-8808

CREATED
November 2023

 **24,400***
new residential
housing units
are needed **by 2030** to
meet expected growth.

**These 24,400 units are in addition to the existing shortage of ~19,400 rental units affordable to households making 0–50% Area Median Income (AMI).*

 *That's an
average of
2,400
new units
per year.*



**Where are these
residential units needed?**

4,016 New Castle County
6,941 Kent County
13,392 Sussex County

Over half of these new builds need to be affordable for households below 100% AMI...

 **12,723**
new residential
housing units
must be affordable to households
making less than 100% AMI
(or \$66,400 for 2 people).

7,523
ownership units

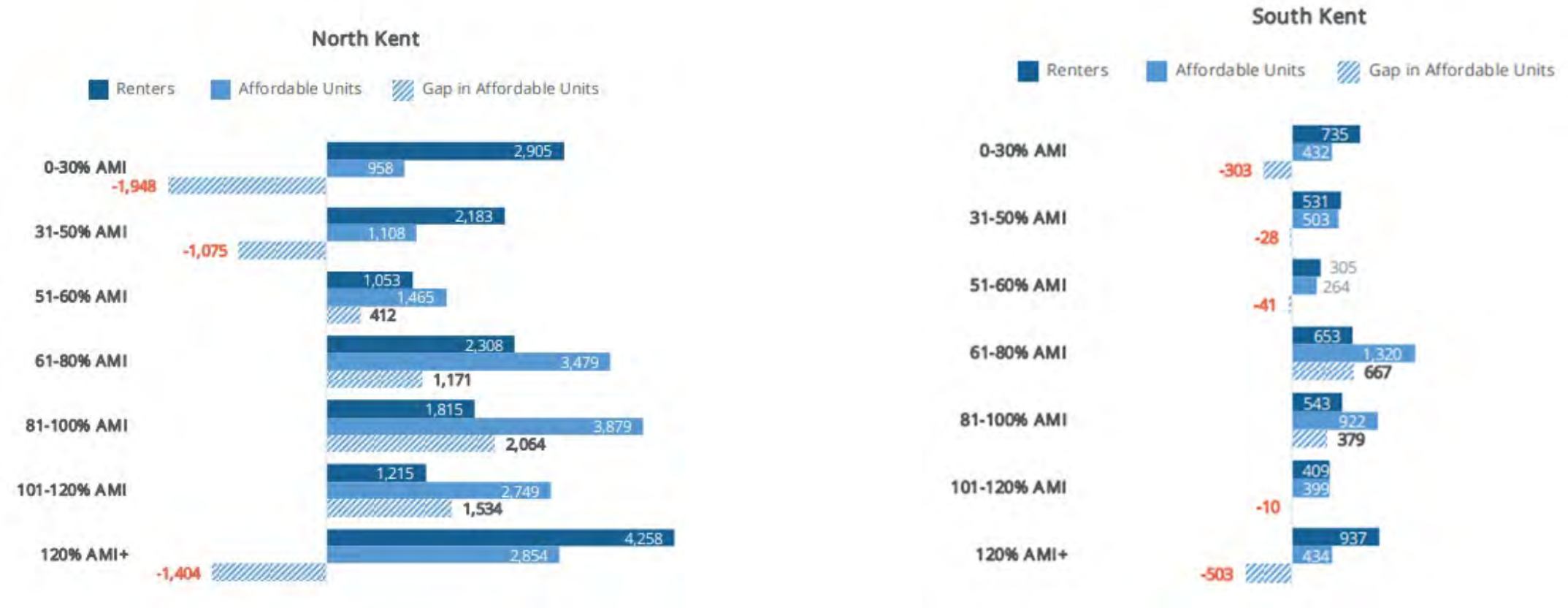


5,200
rental units



*That's an average
of **1,200 new**
units per year.*

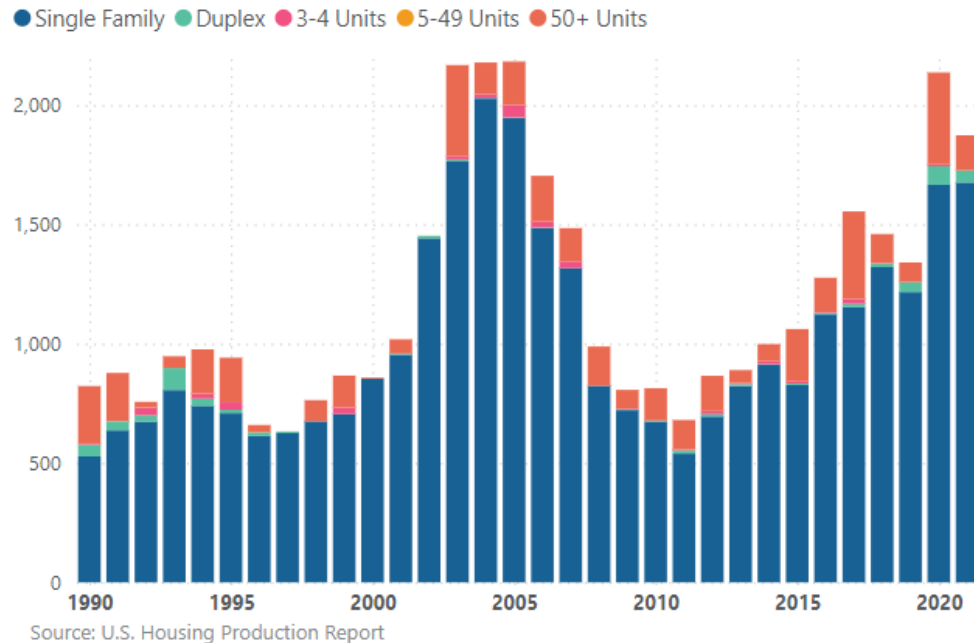
Housing



Statewide, the number of units needed to keep up with growth by 2030 are *in addition* to the current shortage of 19,400 units that are affordable to HHs making 0-50% AMI.

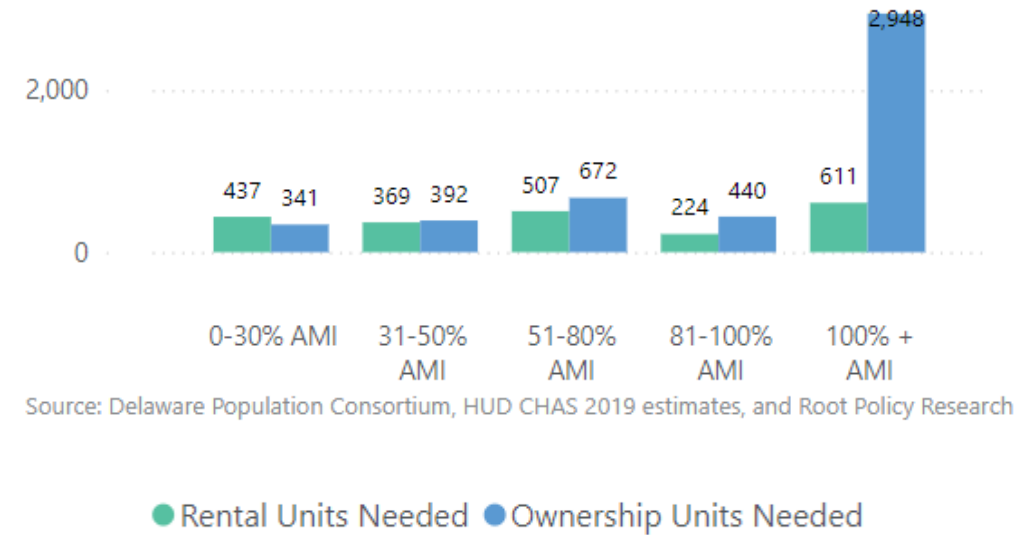
Housing – Kent County

New Units Permitted by Structure Type, 1990-2021
Kent County



Only 7% of the permitted units over the last 5 years were multi-family units, which suggest a greater diversity of housing is needed in the county.

Projected new housing units needed by 2030:



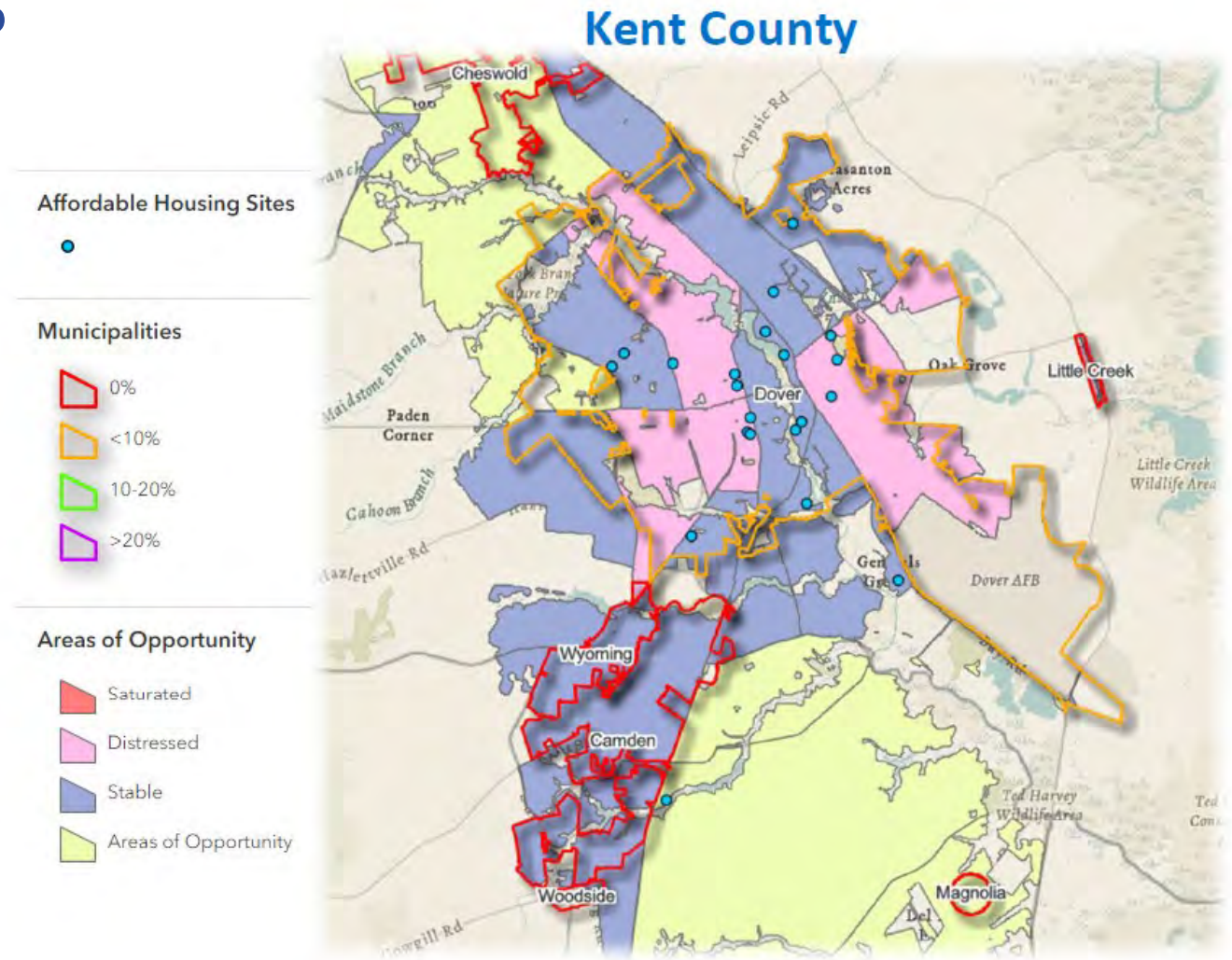
Total: 6,941 units needed, of which:

- 69% should be for homeownership
- 31% should be for renters

Housing – Strategies

Current distribution of affordable housing:

- Primarily in Dover
- Areas of Opportunity have zero affordable housing



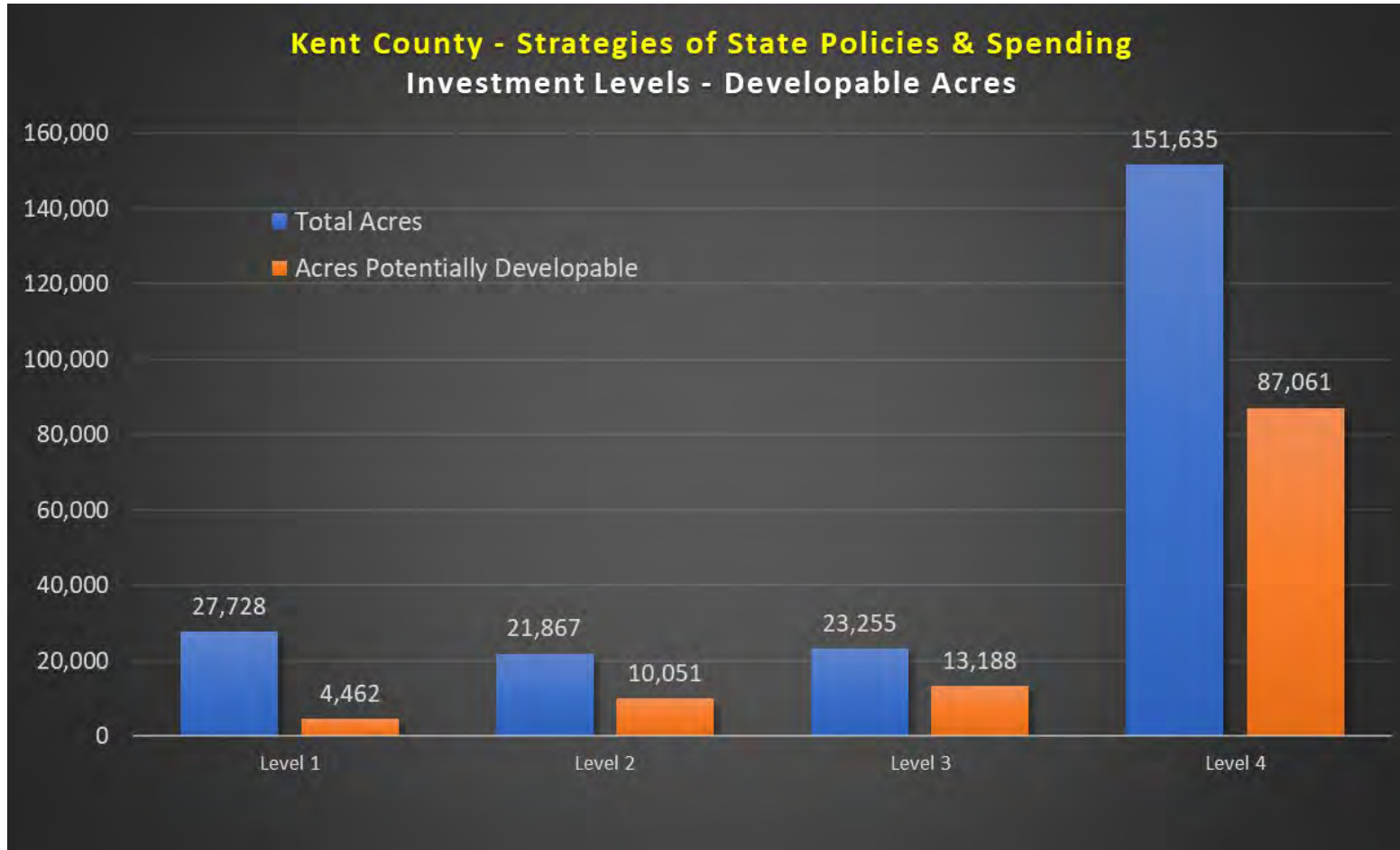


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Conclusions and Discussion

What resonates? What is your experience?

Concluding Points



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Appendix B: New Castle County Workshop Documentation



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Data Analysis Workgroup

Building Collaborative Perspectives on Growth and Development
New Castle County Workshop
November 20, 2024

Meeting Summary
Approved January 10, 2025

Workgroup Members Present:

Nicole Majeski, Secretary, Department of Transportation, Chair
Emily Cunningham, Delaware State Housing Authority
Dan Blevins, WILMAPCO
Kyle Hoyd, Department of Agriculture

1. Secretary Majeski brought the meeting to order and welcomed the stakeholders (attached)
2. Andrea Trabelsi presented the Powerpoint (attached)
3. Char Patibanda presented a brief overview of County perspectives and initiatives, including implementation of the Comprehensive Plan, redevelopment ordinance, pocket neighborhoods (attached)
4. Stakeholders broke into 4 breakout groups: Transportation, Environment, Economic Development and Housing. Stakeholders rotated between groups, participating in all four topics. A summary of these discussions is as follows:

Overarching Themes and Feedback:

Feedback related to data and the development of the State Strategies:

- Drill further down into NCC permits to ensure that they reflect new housing units/rehabbed units and not additions or other improvements. Clarify what type of development is happening in Level 4 in NCC.
- Update wetlands mapping to identify future areas for protection (marsh migration)
- Clarify how Housing Opportunity Areas overlap with school districts
- Include distance between jobs and houses, wages, and taxes in employment area planning

Key Ideas Raised Across Topics:

- Stakeholders desire greater collaboration and direct engagement with state and local governments
- Increase enforceability of the State Strategies - allow agencies to say “no” and ensure that agency policies consistently support the SSPS
- Statewide plans for climate risk and transportation
- Make it more efficient and cost-effective to develop/redevelop in growth areas/TIDs than outside of them



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- Ensure incentives for land preservation/conservation are equal to the incentives to develop
- Public education and awareness: Increase public awareness (including public officials) and understanding of preservation, climate change, affordable housing, and the need for planning

Transportation Breakout Group

Q1. How can the state work with county and local governments to help guide new development towards Transportation Improvement Districts (TIDs) and other designated growth areas?

Q2. How should transportation infrastructure proposed outside of TIDs, and other designated growth areas be addressed and funded?

Planning and Coordination

- Develop a statewide transportation plan that is consistent with State Strategies and is enforceable
- Determine what research is needed to address specific community challenges.

Incentives and Funding

- Explore how the state can transfer more infrastructure responsibility to counties and local governments/provide options for local governments to pay
- Expand the DDD for neighborhood centers and corridors
- Streamline approval processes for redevelopment/projects within growth areas and provide incentives to equalize less expensive development in L4 areas

Development Outside of TIDs/Growth Areas

- The state should have greater authority to deny funding for projects outside growth areas
- Require developers to fund infrastructure improvements and maintenance and/or provide cost-sharing agreements

TID Process Improvements

- Create additional categories of TIDs, like corridors, to encourage collaborative growth
- Ensure TID boundaries are binding but allow flexibility for addressing exceptions
- Address concerns of developers penalized for being "late" in TID processes

Traffic and Transportation

- Ensure traffic studies capture real-time and weekend scenarios
- Focus on making transportation more inclusive and equitable
- Consider sea-level rise in road investments and avoid funding roads likely to be inundated
- Align Level of Service (LOS) standards with state strategies (stricter in Levels 3 and 4; more lenient in Levels 1 and 2)
- Introduce a "fee-in-lieu" system for pedestrian facilities in Levels 1 and 2



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Environment Breakout Group

Q1. What are the barriers and opportunities to more effectively protect and preserve important ecological resources, open space, and farmland?

Funding and fiscal policy

- Public funding for land acquisition and preservation is too limited/formulas outdated:
 - Revise state open space funding formula; State acquisition is too restrictive
 - Revise farmland preservation formula to prioritize high-value farmland/econ development
 - Farmers may prefer five-year preservation commitments over ten-years
- Fund more permanent conservation easements
- Family land inheritance often leads to subdivision due to tax burdens

Regulations and policy

- Provide more authority to protect state-designated endangered species
- Utilities that are exempt from regulation can disrupt preservation efforts
- Update ordinances to enhance preservation
- Update mapping of wetlands to identify areas for potential protection
- Strengthen incentives for land preservation, including TDRs (transfer of development rights)

Environmental Education

- Increase public awareness (including public officials) and understanding of the ecological value of resources and their role in mitigating climate change
- Support effective, well-funded local nonprofits focused on conservation easements

Q2. How should state capital resources be invested in areas with increased risk of damage from more intense storms, flooding, sea level rise, and other hazards?

Flood Management

- Invest in stormwater infrastructure and marsh migration strategies

Zoning and Incentives

- Promote green roofs, natural buffers, and resilient construction in high-risk zones
- Fund updates to zoning codes and incentivize floodplain protection

Statewide Vision

- Develop a statewide plan for environmental goals, including strategic retreat and land acquisition

Education and Collaboration

- Build awareness about the value of preservation and enhance coordination among all levels of government

Economy Breakout Group



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Q1. What land and infrastructure assets should be preserved and enhanced to support the needs of current and emerging businesses and industries? How might the State best incentivize this?

Mobility

- Expand access to public transportation and normalize it
- Expand rail networks to include downstate and expand freight rail

Development Incentives

- Expand the DDD and develop a rebate program (similar to DDD) for neighborhood centers
- Tax incentives for develop/rehabilitate in low-income neighborhoods, without displacing people
- Fast-track zoning for businesses in low-income neighborhoods

Improve the attractiveness of urban living

- Develop a city high school in Wilmington
- Develop urban amenities
- Tax incentives for employees of a city to live in a city and for businesses to locate there

Other:

- Protect and preserve our state parks
- Align shipping demand (Amazon orders) with undesirable logistic mailing warehouses

Q2. What investments are needed to attract and retain a workforce that both serves the needs of an aging population and fuels a competitive economy?

Affordable Housing & Transportation

- Use site readiness funds to create multi-use, walkable communities along key corridors
- Address workforce housing challenges, focusing on affordability and proximity to employment
- Provide tax incentives for young professionals purchasing homes
 - Pair redevelopment projects with workforce development initiatives

Education & Talent Development

- Leverage colleges and universities to attract young talent, including out-of-state
- Maintain a collegiate presence in Wilmington
- Invest in raising public school outcomes and establish mentorship programs

Economic Growth & Workforce Development

- Recruit young professionals, including out-of-state talent
- Incentivize remote workforce opportunities
- Develop amenities and attractions to increase Delaware's livability and attract large employers
- Improve public salaries
- Assist farmers with succession planning

Data-Driven Strategies



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- Invest in data on future trends in transportation and housing, including housing biases
- Combat biases regarding affordable housing's impact on property values with data and education

Housing Breakout Group

Q1. How can the State work with local governments to facilitate the development of diverse housing that meets residents' affordability needs?

Q2. What are the barriers to and opportunities for increasing mixed residential development in SSPS levels 1 through 3?

Public Education

- Educate decision-makers on housing needs and clarify affordability definitions
- Combat stigma around affordable housing through public campaigns, highlighting workforce housing

Incentives

- Provide tax credits, density/height bonuses, and expedited review processes (Jobs Now) with a collaborative approach between County, State and Federal (where applicable)
- Use public-private partnerships to redevelop vacant buildings and surplus government buildings into affordable housing
- Incentivize inclusionary zoning and integrate subsidies for developers
- Provide a more predictable approval process with maximum review times for state agencies
- Create a rent-to-own program
- Adopt a statewide building code
- Explore Transfer of Development Rights (TDRs) and expand the DDD

Zoning Reform

- Incentivize inclusionary zoning and diverse housing types
- Require affordable housing as part of rezonings, conditional uses and/or certain types of districts/developments
- Instead of model ordinances, develop a model/standard process to streamline approvals of ADUs, mixed used, etc.
- Align regional zoning policies across municipalities and counties
- Rezone vacant buildings for multifamily or mixed-use development to incentivize affordable housing

Funding

- Encourage local housing trust funds and leverage federal funding (e.g., HUD's Choice Neighborhoods program)
- Integrate public-private funding for developments
- Address funding gaps in city redevelopment programs



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State Strategies/PLUS

- Expand SSPS Levels 1–3 with affordable housing options
- Create statewide policies to enforce affordable housing measures, such as building quotas or mandatory inclusionary zoning
- Enable greater enforcement of the Statewide Strategies and add more detail (i.e., rather than just levels 1-4, certain areas are downtown mixed-use, etc.)
- Provide guidance for how local comp plans should address affordable housing and add a minimum requirement for State approval

DAW-New Castle County Workshop
November 18, 2024
Sign-In Sheet

✓	Name	Organization	Breakout Group
	Char Patibanda	NCC _ Land Use Director	NA
	Matt Rogers	NCC- Land Use	NA
	Morris Deputy	Town of Middletown	Transportation
	Antonina Tantillo	City of New Castle	Environment
	Doug Eitelman	VanDemark & Lynch, Inc	Housing
	Elizabeth Keller	Committee of 100	Economy
	Erin Booker	Community Health and Engagement	Transportation
	Wes Stefanick	Delaware Association of Realtors	Housing
	Sydnie Grossnickle	Farm Bureau	Environment
	Mark Nardone	Delaware Nature Society	Environment
	Emily Knearl	The Nature Conservancy	Transportation
	Tracy Surles	Woodlawn Trustees	Housing
	Dionna Sargent	Cinnaire	Economy



STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

Building Collaborative Perspectives on Growth and Development

November 20, 2024 | New Castle County

Agenda for Fall 2024 Workshops

Objectives:

Build awareness

Share data-driven
information

Gain common
understanding and
consensus

- I. Welcome (10 min)**
- II. CCSPI Data Analysis Workgroup presentation (30 min)**
- III. Q & A (5 min)**
- IV. County presentation (15 min)**
- V. Open discussion (10 min)**
- VI. Break (10 minutes)**
- VII. Breakout groups (60 min)**
- VIII. Gallery Walk/Break (15 min)**
- IX. Large group recap (10 min)**
- X. Public comment (10 min)**
- XI. Next steps (5 min)**



STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

State Perspective Presentation

I. State Planning Overview – role of State and Local Governments

II. Data-backed insights

III. Further into the data





STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

I. State Planning Overview

Planning policy and practices in Delaware

State Planning Role



STATE STRATEGIES FOR
POLICIES AND SPENDING
DOCUMENT AND MAP



REVIEW LOCAL
GOVERNMENT
COMPREHENSIVE PLANS

FORWARDS REPORT AND
RECOMMENDATION TO
GOVERNOR FOR
CERTIFICATION *



ORGANIZE COMMENTS FROM
STATE AGENCIES VIA THE
PRELIMINARY LAND USE SERVICE
(PLUS)



PROVIDE TECHNICAL
ASSISTANCE



Like those stationed in the lookout towers, keeping their eyes on the horizon...

Local Planning and Coordination



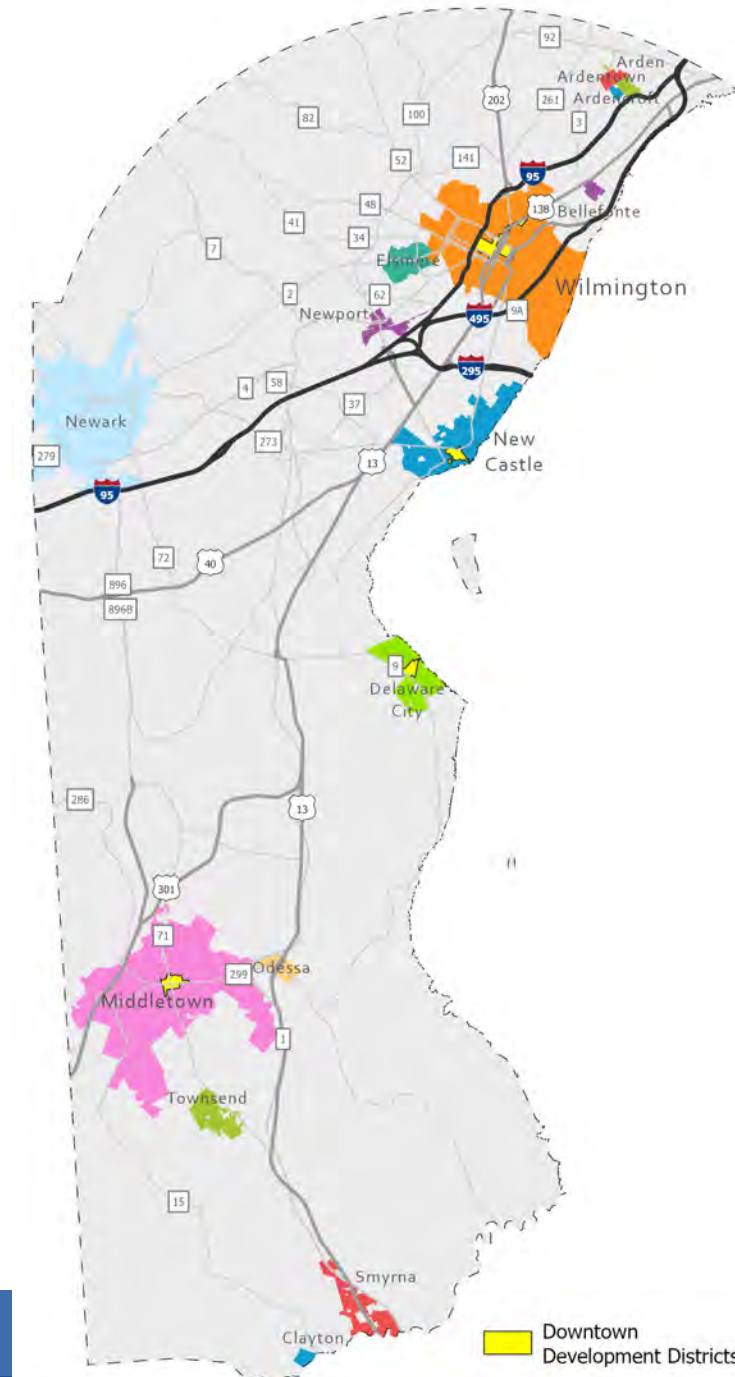
Title 22 requires all municipalities to prepare comprehensive land use plans

Text and maps have the “force of law”



Title 9 requires county governments to prepare comprehensive land use plans

Map or Map Series has “force of law.”



State Funding for Infrastructure and Services



90%

Public School
Transportation



85%

State Roads



100%

State's Largest
Police Force



60–80%

Public School
Construction



60%

Public School
Operations



30%

Paramedics

*Delaware at or near the top of state share
of all government spending:*

Table 1-4. State Share of Spending in Delaware, Neighboring States, and the United States, 2005

Jurisdiction	State Share of Spending as a Proportion of All Government Spending on Select Items (Rank Among States)			
	Highway Spending	Parks and Recreation Spending	Police Protection Spending	Total Spending
Delaware	81.0% (5)	57.6% (1)	35.3% (2)	78.0% (7)
Maryland	67.3% (19)	9.5% (37)	21.1% (15)	64.9% (29)
New Jersey	62.6% (28)	44.3% (3)	16.8% (27)	63.6% (32)
Pennsylvania	77.2% (10)	17.5% (26)	25.4% (5)	62.6% (36)
U.S. Average	61.2%	14.1%	13.4%	62.0%

Source: Governing: State & Local Sourcebook. Originally compiled from the Annual Survey of Government Finances, 2004-2005, U.S. Census Bureau. Accessed on June 3, 2008, from sourcebook.governing.com.

What is the Strategies for State Policies and Spending?

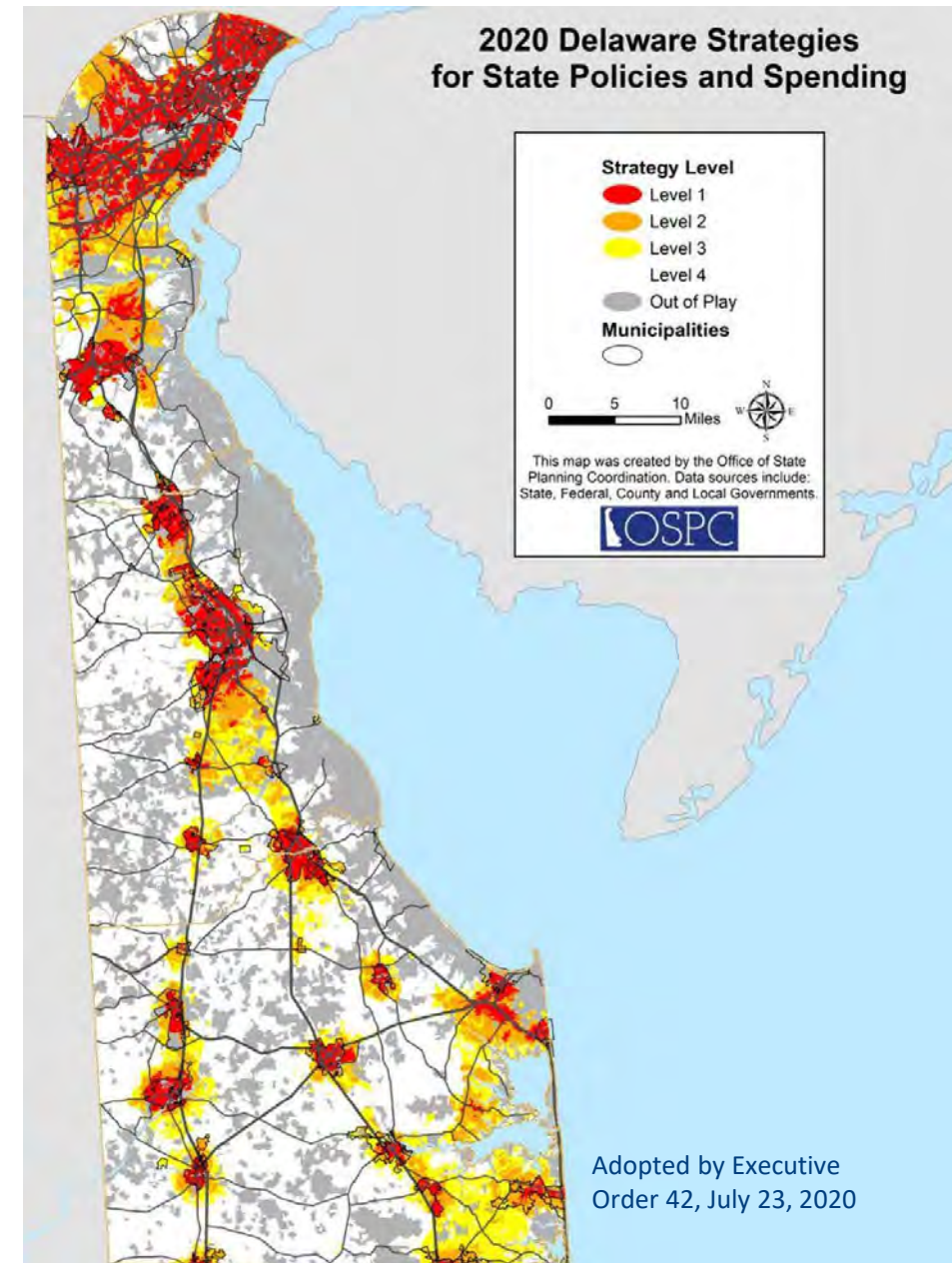
- **Required by Delaware Code*:**

... The Committee shall consider matters relating to the *orderly growth and development* of the State, including, but not limited to:

Preparing the Strategies for State Policies and Spending document and maps, which shall serve as the primary policy guide that summarizes the State's land use goals, policies and strategies and directs State spending into investment levels that support the most efficient use of State resources...

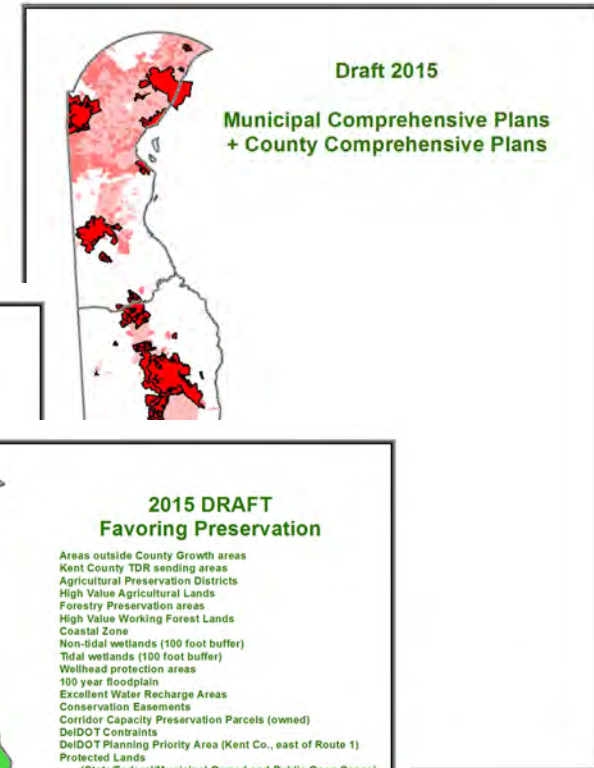
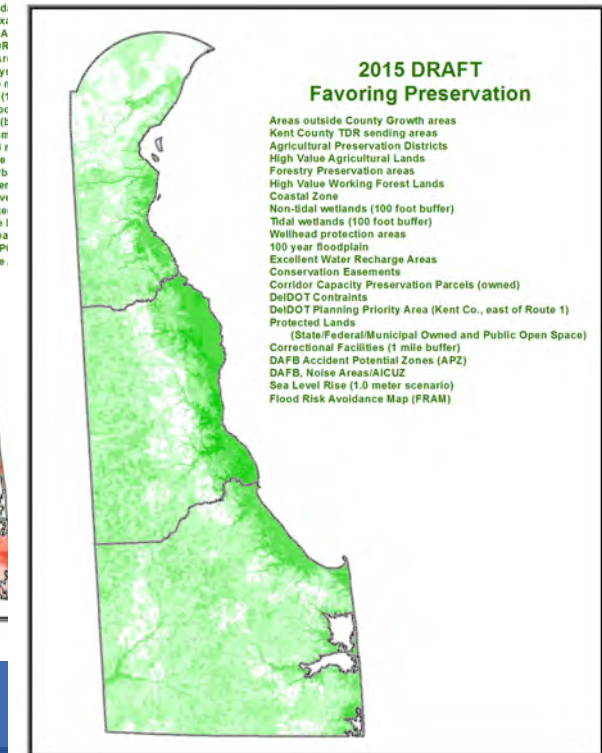
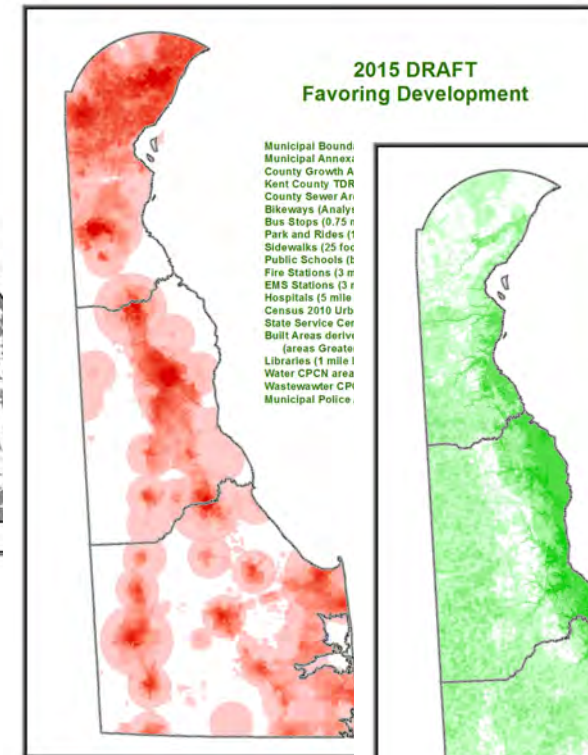
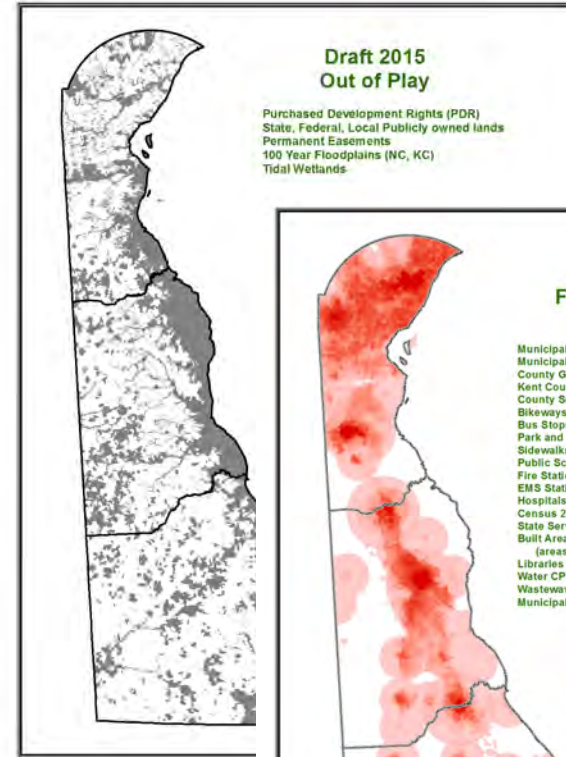
- Policies and maps guide State investments in infrastructure and services
- Do not preempt local land use authority; localities make own land use decisions per Delaware law
- Must be considered in local comprehensive plans
- **History: 1999 adopted; Updated in 2004, 2011, 2015 & 2020**

*Title 29, Chapter 91, Section 9101 (c) (5)

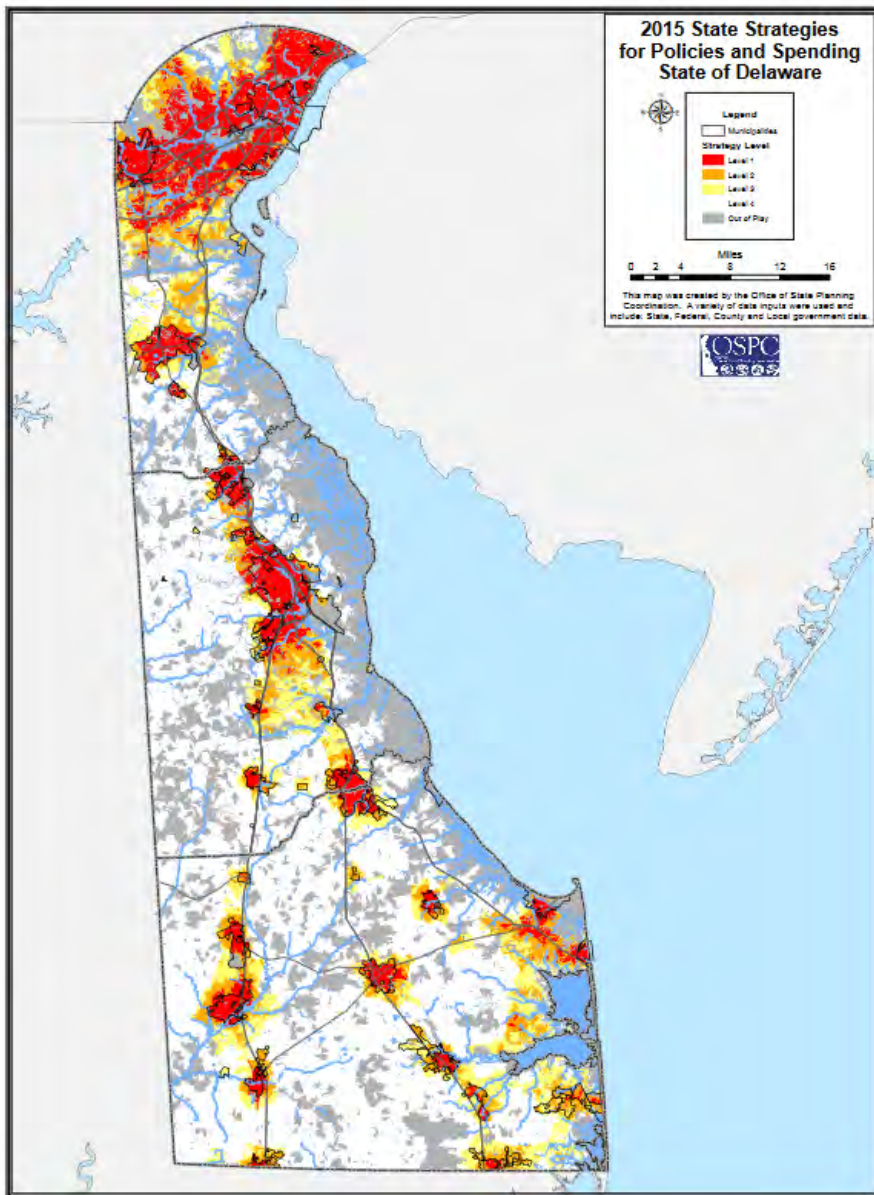


Data used to make maps include:

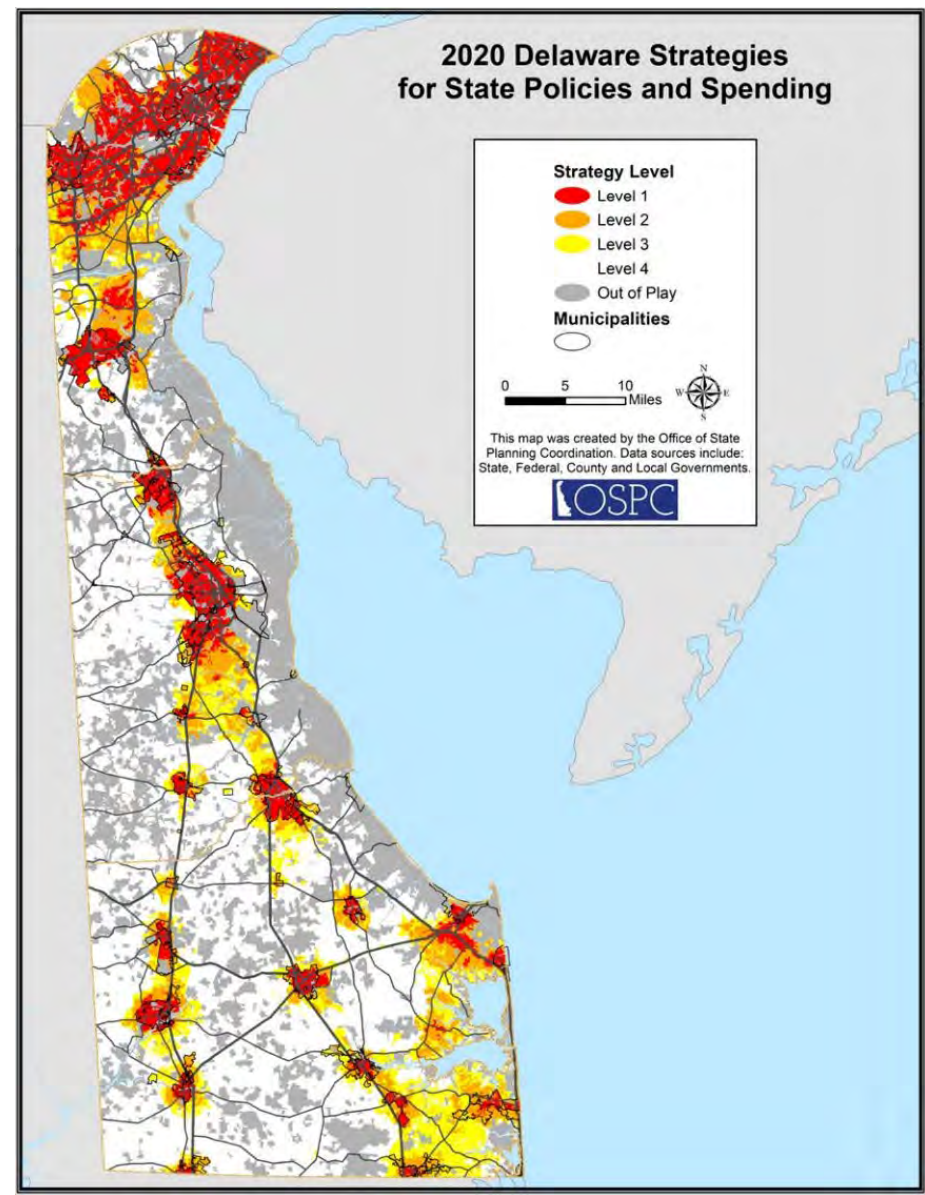
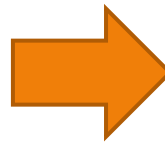
- School Sites
- Transit Routes
- Social Service Centers
- Police/Fire/EMS Facilities
- Corridor Capacity Preservation Areas
- Ag Preservation Districts
- Green Infrastructure
- Parklands
- Municipal and County certified comprehensive plans



Packets on table show the layers used to generate maps



2015 Strategies



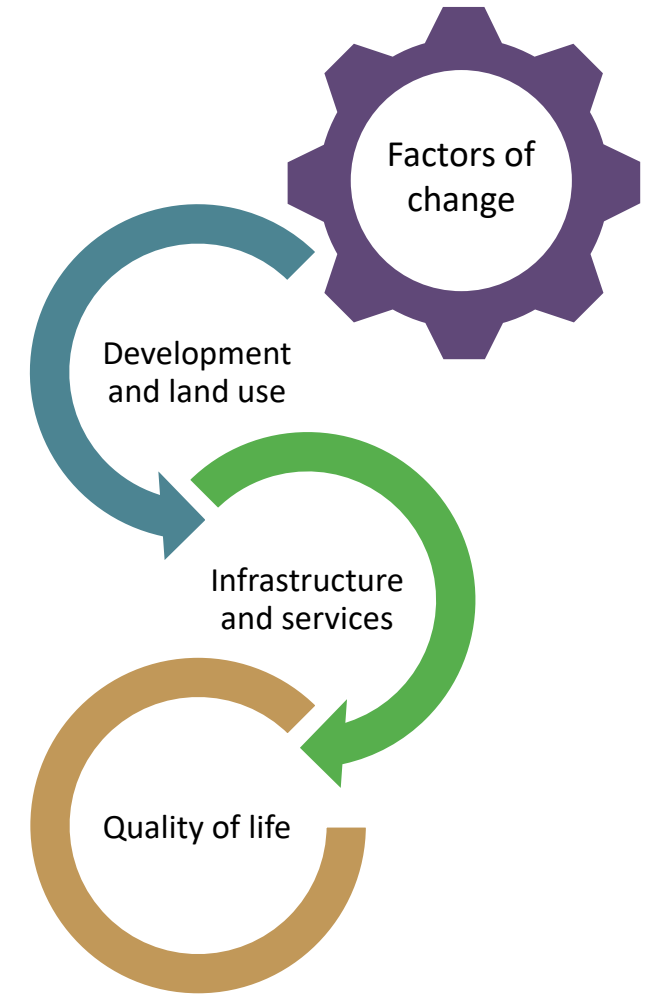
2020 Strategies



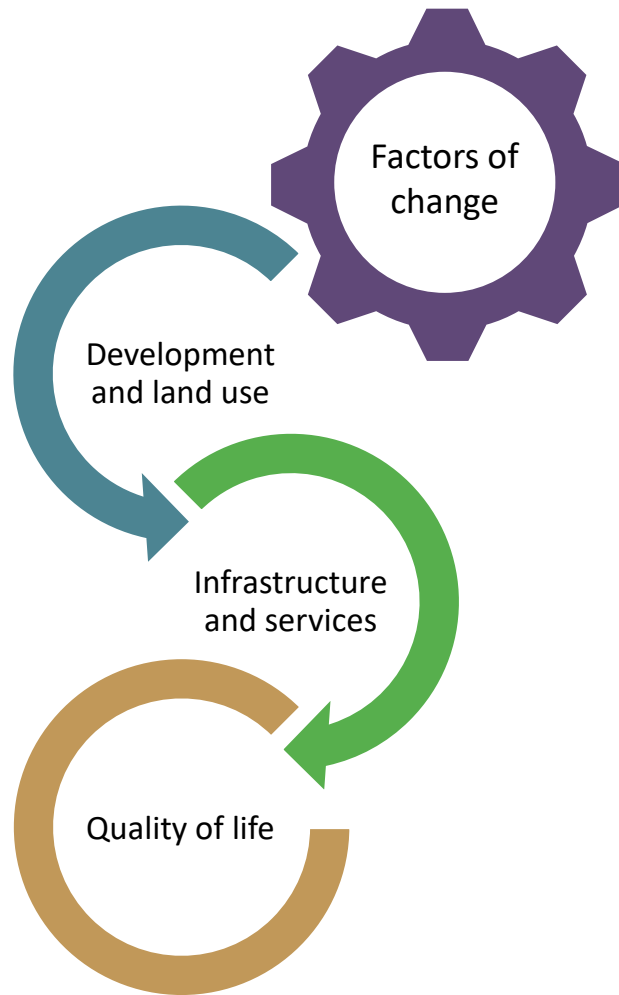
STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

II. Data-Backed Insights

External factors and their effects on Delaware communities



External Factors



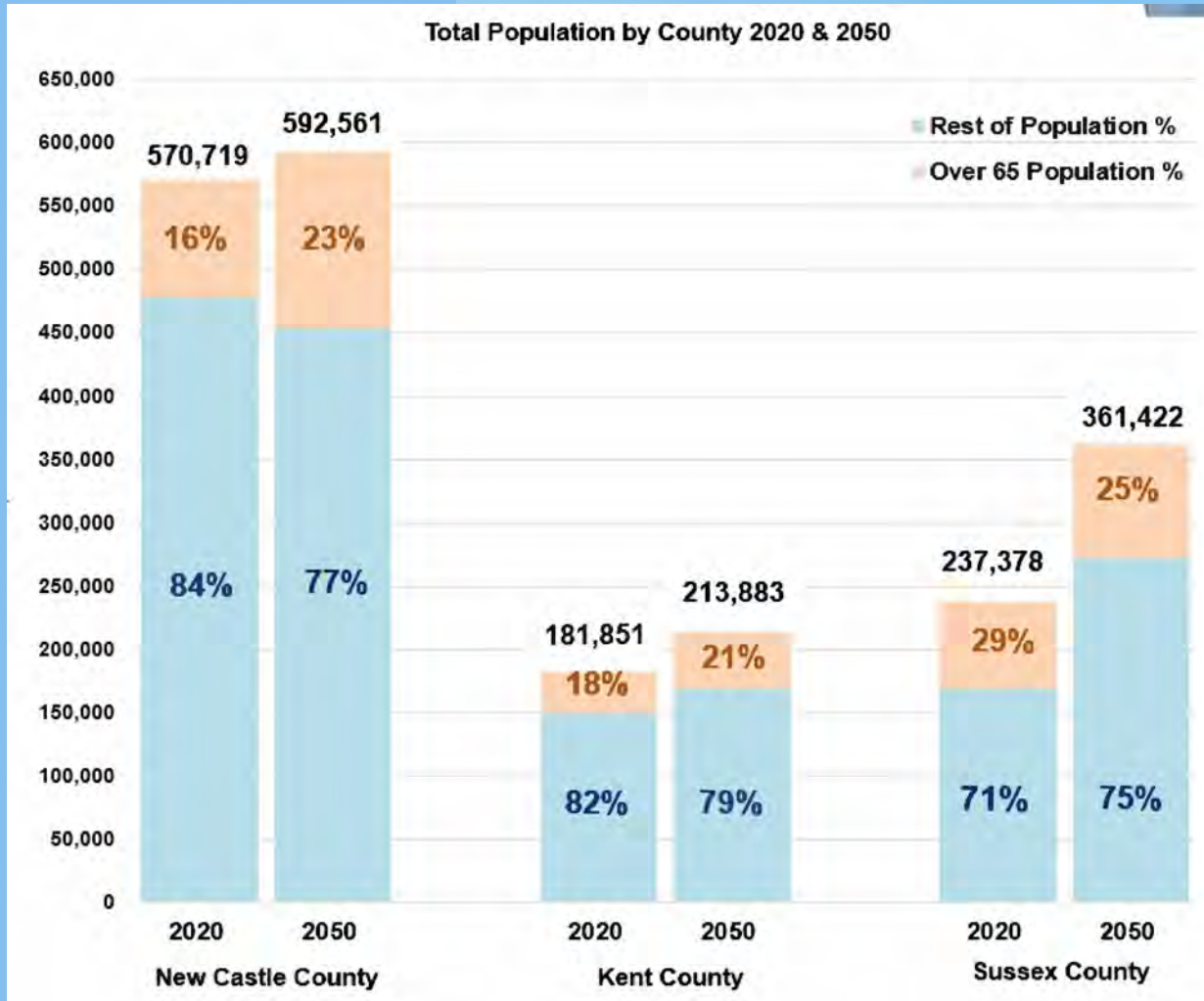
Factors Affecting Delaware



- **Real estate market demand:**
 - Lower taxes attracting influx of new residents from surrounding region
 - Especially retirees
 - Especially Sussex County
- **Technology changing work and shopping patterns:**
 - E-commerce spurring warehousing presence and logistics activity
 - Remote work changing commuting habits
- **Sea-level rise, climate change and flooding:**
 - Rising water levels on our coastal state caused by GHG emissions are causing more frequent / severe flooding, including sunny-day flooding
 - Sea levels will continue to rise and days with heavy precipitation expected to increase



What's Going on Here?



Relative to other states, locating in Delaware is appealing:

- low taxes
- access to services, amenities, etc.



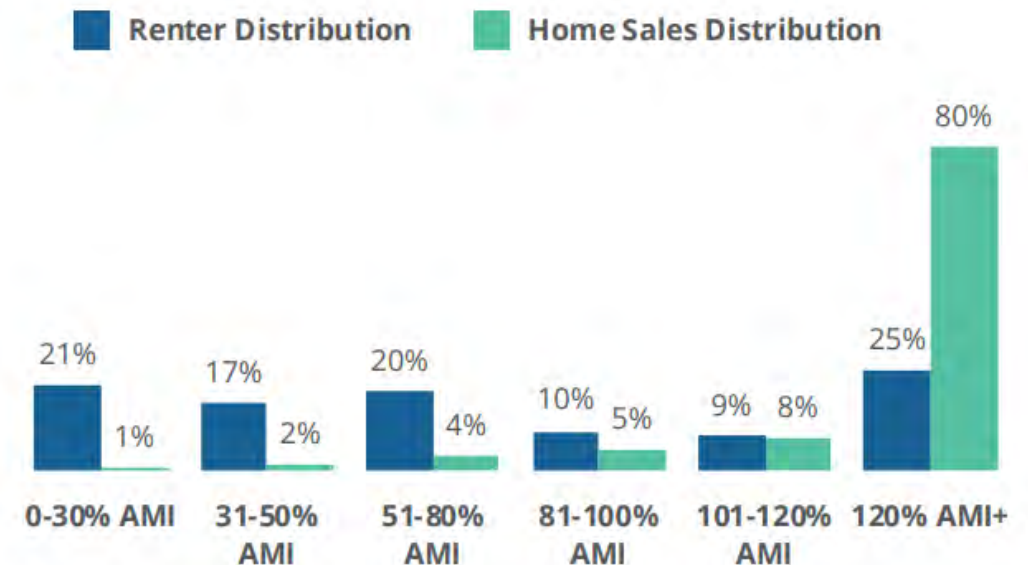
Data Insight: Demographics are Changing

- People relocating to Delaware –
 - About 27,000 net domestic migration to Delaware (2000-2022)
- Increasing share of population is older
- Demand for high-price point housing product

What are the implications?

- Mismatch in housing being provided relative to local need
- Increasingly unbalanced, feedback loop effect:
 - Housing
 - Development / land consumption
 - Essential services and infrastructure

Comparison of Renters and Affordable For Sale Homes by AMI, Delaware, 2022



Note: Assumes a 30-year mortgage at a rate of 6.5% with a 20% down payment and 25% of monthly payment is used for property taxes, utilities, and insurance.

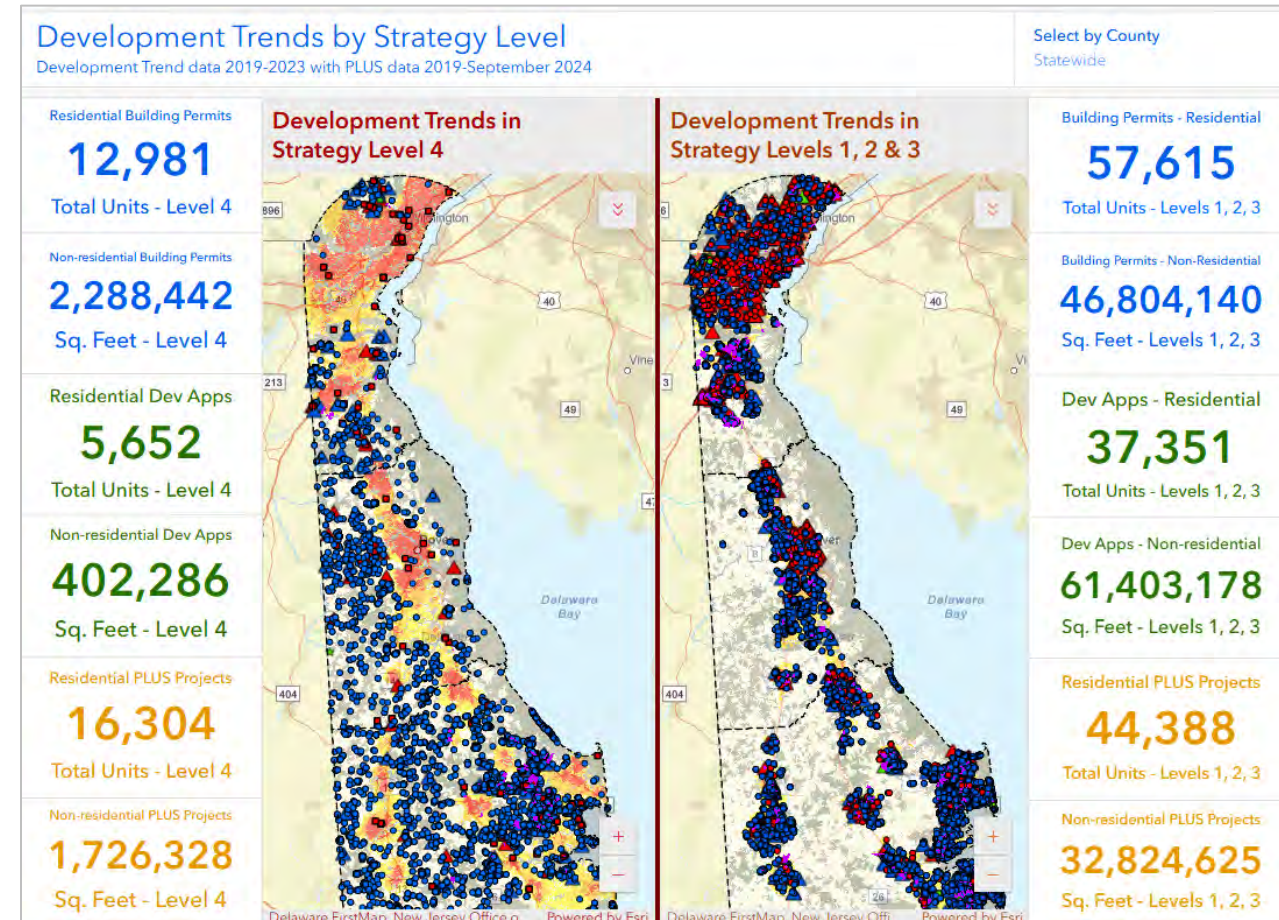
Source: Root Policy Research, 2021 ACS 5 year estimates, and HMDA.

Data Insight: Development and Land Use

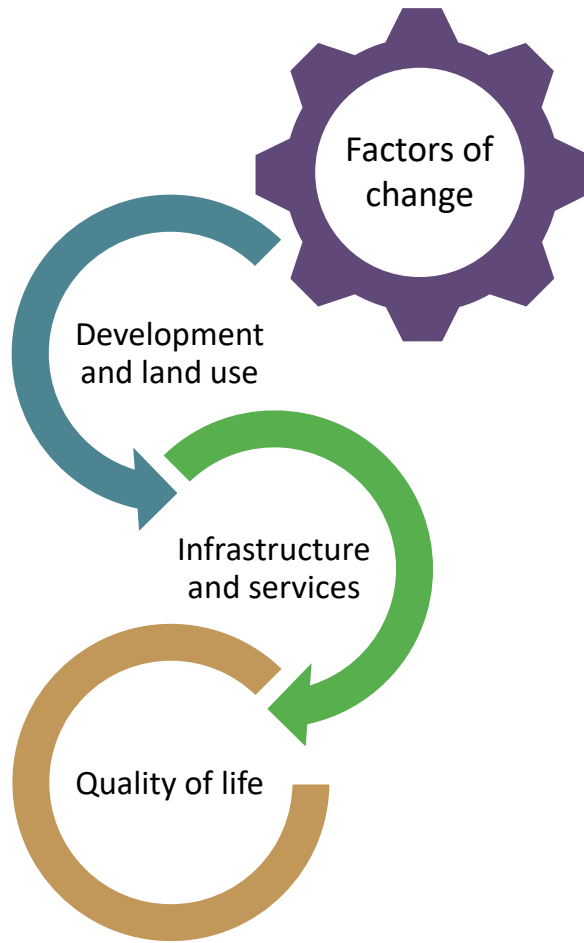
- Sprawl
- Uniform housing
- Warehousing/logistics

What are the implications?

- Inefficiencies and rising costs to provide the infrastructure
- Associated impacts:
 - Increasing motor vehicle traffic and vehicle miles traveled
 - Affordable housing (living) challenges
 - Environmental degradation (forest, ecosystem, water, etc.)
 - Risk (in light of climate change)
 - “Crowding out” of industry, farming



Adapting to Factors of Change



State can't control the external factors, but:

- Collaborates with local authorities on development and land use
 - Monitoring change (eyes on horizon)
 - Planning support (comprehensive plans)
 - PLUS process (provide support and insights on project basis)

- Monitors, plans, budgets/programs, provides infrastructure and services

...and inasmuch works to support communities across the state toward high quality of life





STATE OF DELAWARE
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Data Analysis Workgroup

III. Further Into the Data

A closer look at trends, implications, and finding ways to adapt...

Transportation

Environment

Economy

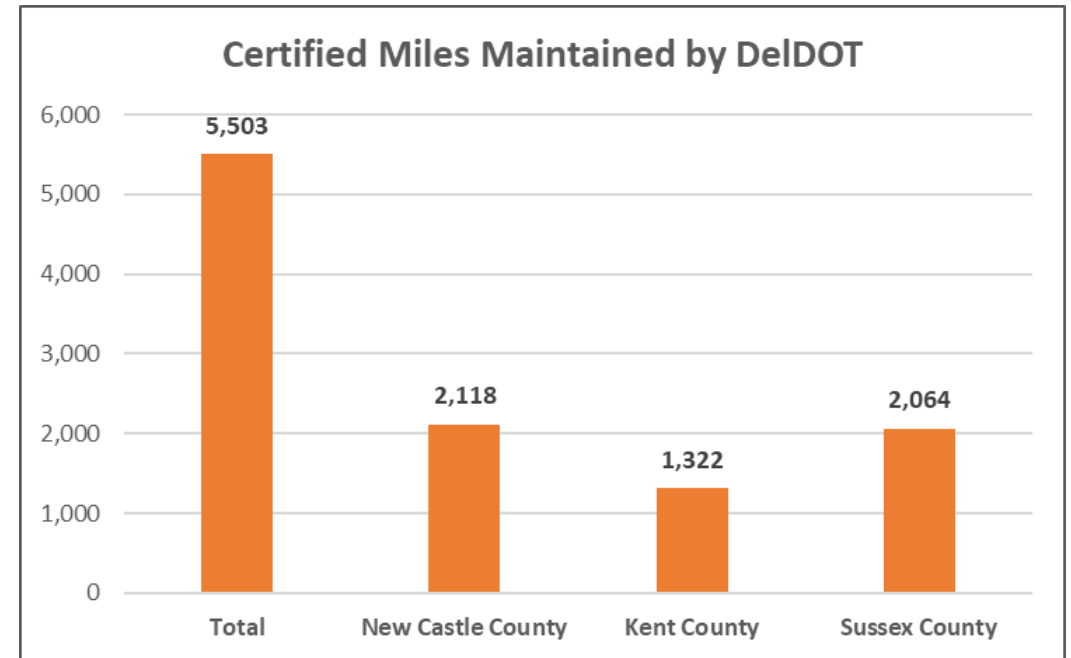
Housing

Transportation

Delaware DOT manages 89%
(national average of state-maintained roads: 20%)

Trends:

- Costs for infrastructure rising
- Funding forecasts trending down
- Frequently flooded roadways - 250 road segments were prioritized based on flood risk and several other factors (AADT, evacuation routes, essential facilities, etc.)
- Transit is evolving



*HPMS certified miles, or Certified Public Mileage (CPM), are the total length of a state's public roads as certified by the state's governor.



Market reviews (2010-2030)

Transportation

Transportation Improvement Districts (TID) – a proactive, collaborative approach to planning / funding transportation infrastructure.

14 TIDs statewide

Forecasted development in TIDs:

- 74k residential units
(over two times Wilmington or 100 times Cheswold)
- 40 million non-residential square feet
(nearly 40 Christiana Malls or 100 warehouses)

Over \$1 Billion in projects identified

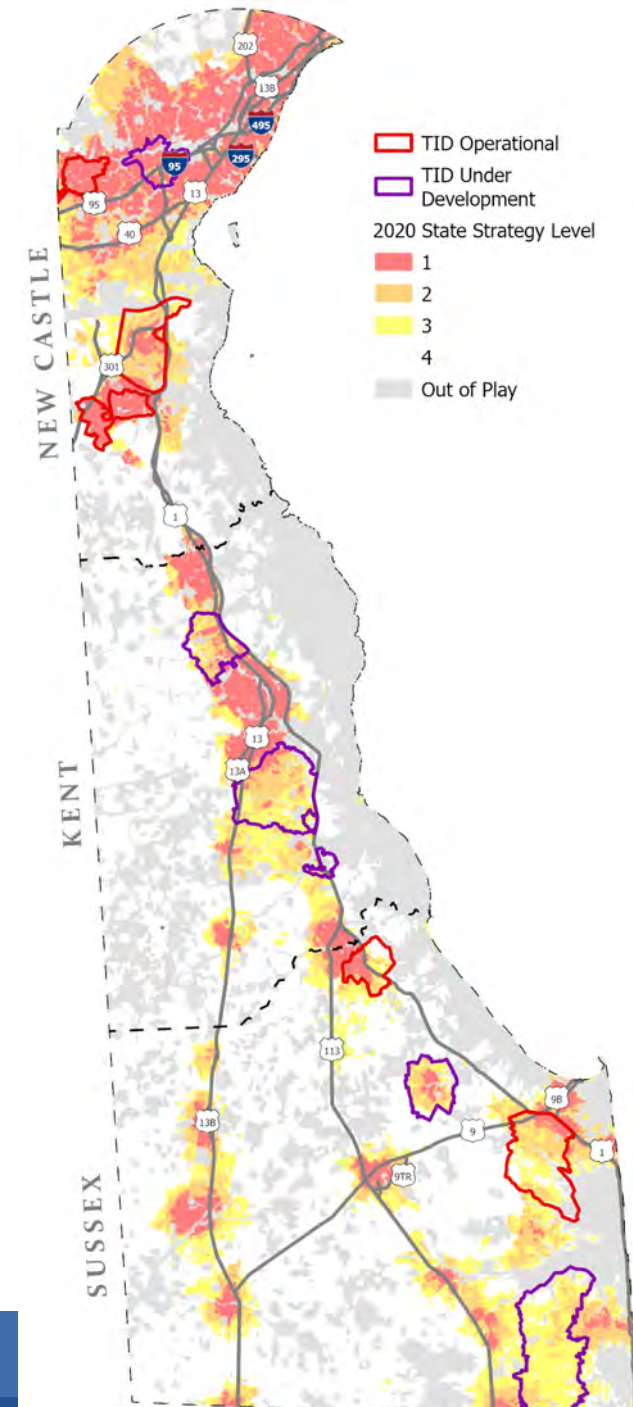
(includes 2 of 7 TIDs currently under development)

TID Operational

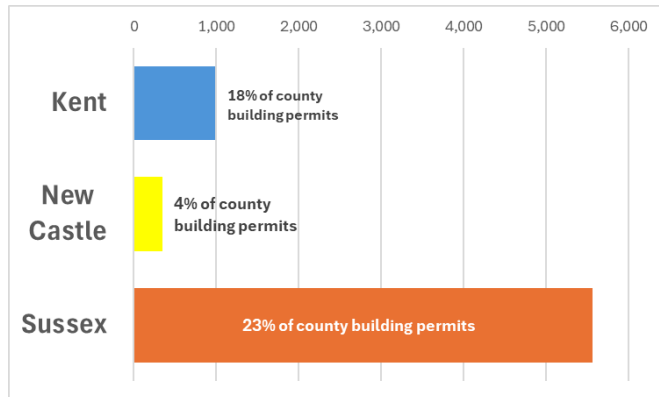
- Newark
- Southern New Castle County
- Hyetts Corner
- Westtown
- Easttown
- SE Milford
- Henlopen

TID Under Development

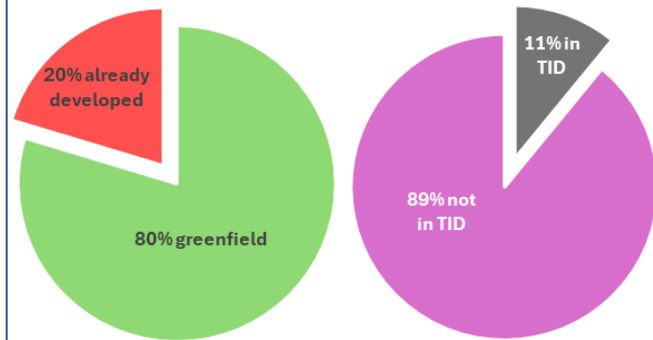
- Little Heaven
- South Frederica
- Cheswold Area
- Magnolia
- Milton
- Roxana Area
- Churchman's Crossing



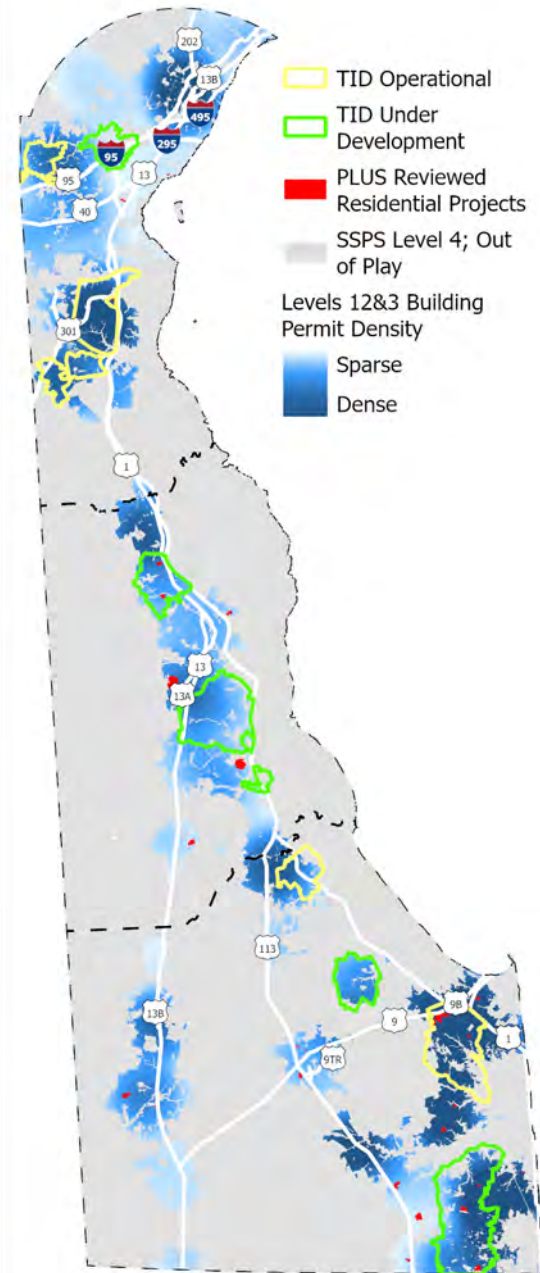
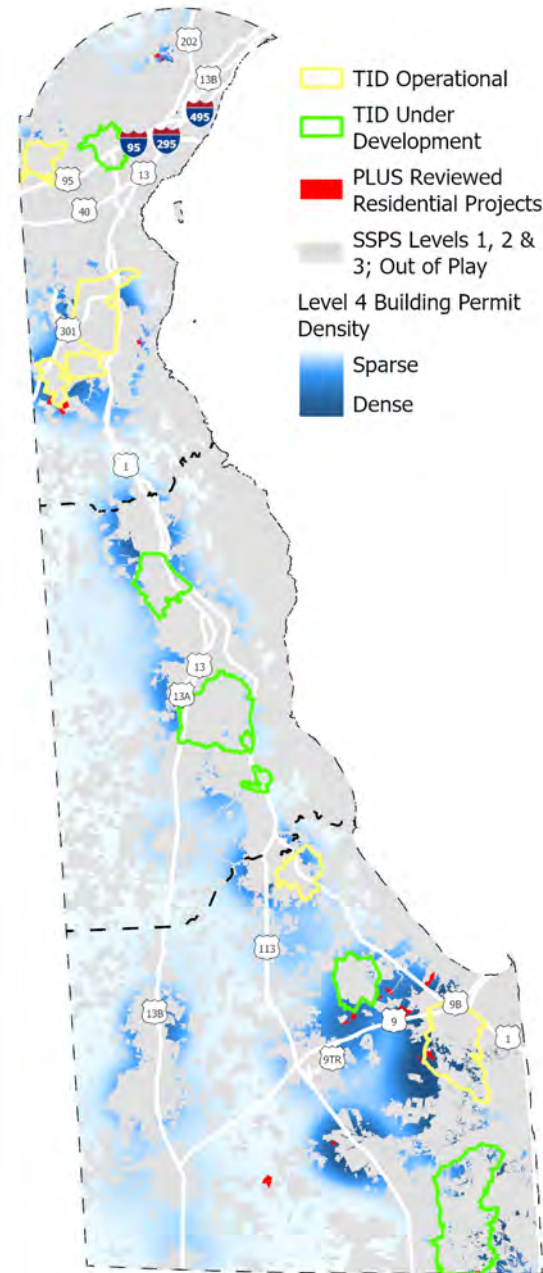
Development Trends in Strategy Level 4



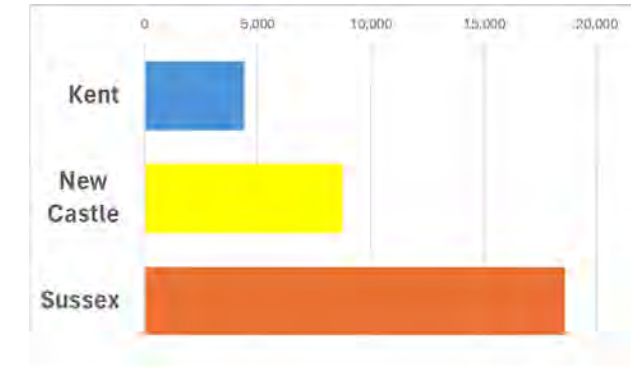
Building Permits Level 4:
6,886 residential units (18%)
765,659 non-residential sqft (3%)



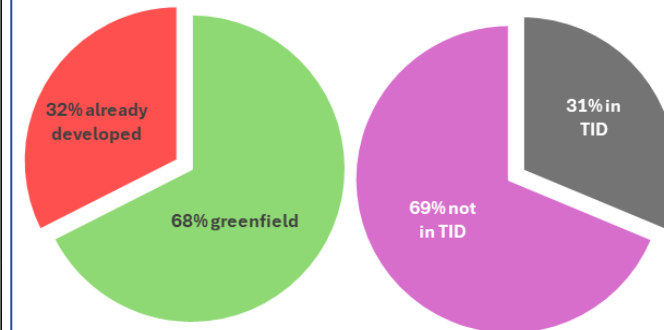
Reviewed PLUS Dev't Level 4:
8,685 residential units (46%) 814,100 non-residential sqft (13%)



Development Trends in Strategy Levels 1, 2 and 3



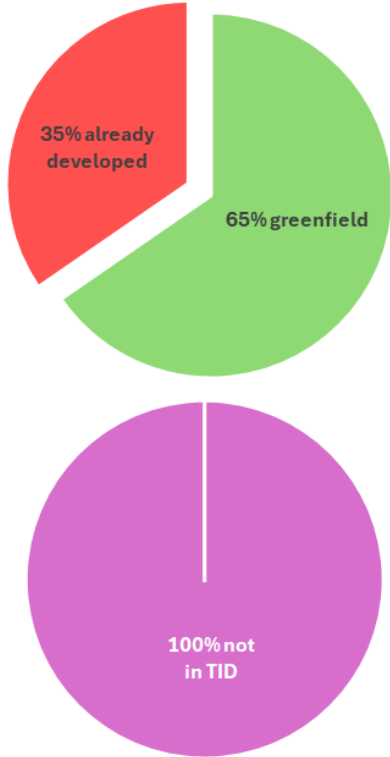
Building Permits Level 1, 2 & 3:
31,751 residential units (82%)
25.5M non-residential sqft (97%)



Reviewed PLUS Dev't Level 1, 2 & 3:
10,353 residential units (54%) 5.4M non-residential sqft (87%)

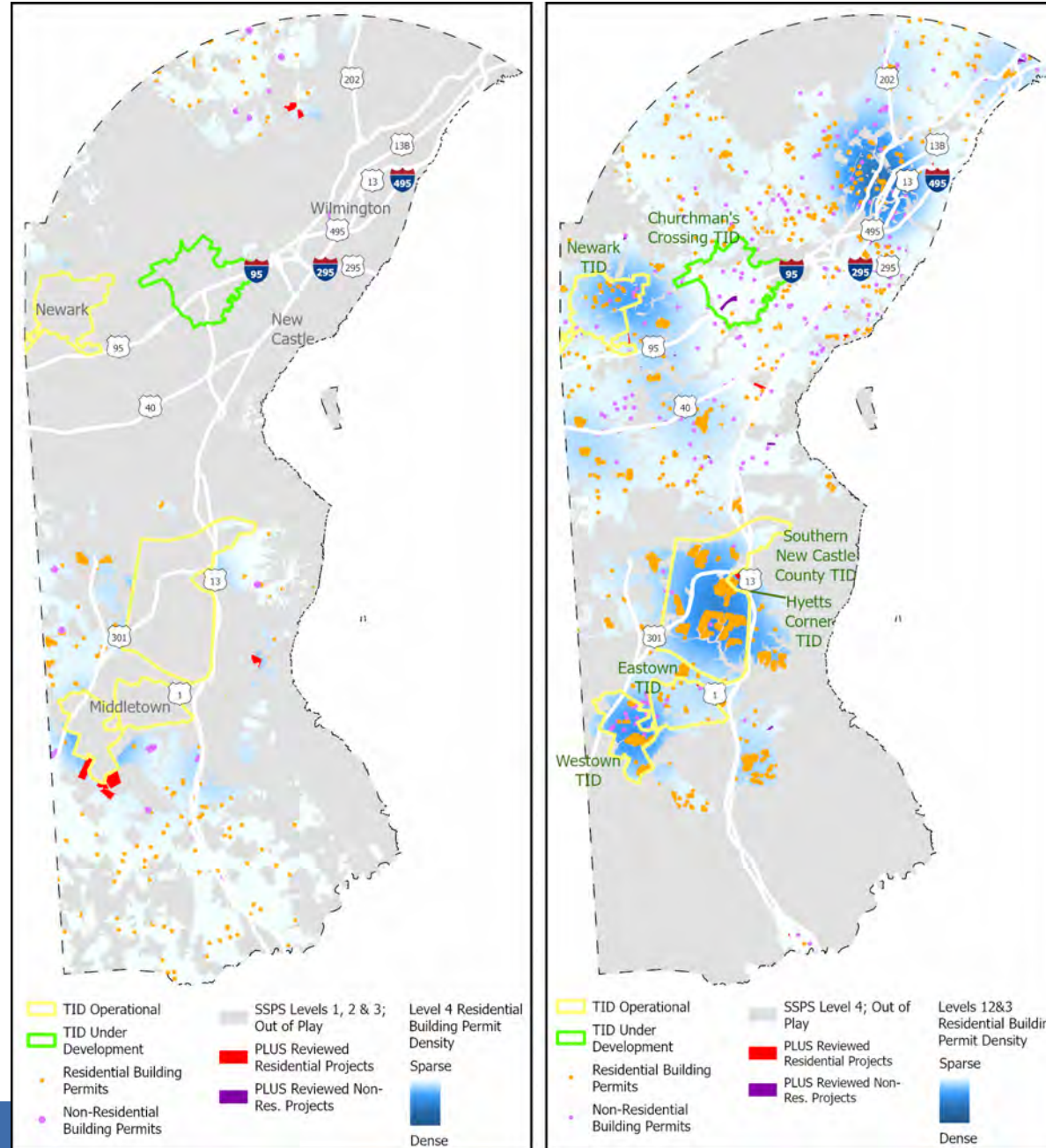
Development Trends in Strategy Level 4

Building Permits Level 4:
344 residential units (1%)
83,028 non-residential sqft (<1%)



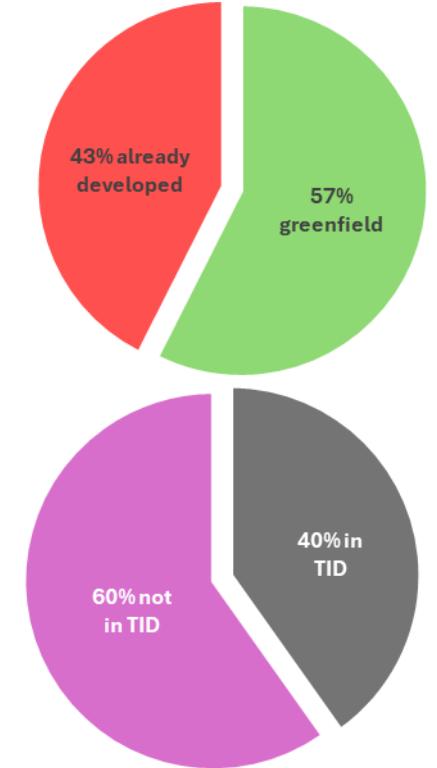
Reviewed PLUS Dev't Level 4:
1,735 residential units (65%)
0 non-residential sqft (0%)

NEW CASTLE COUNTY



Development Trends in Strategy Levels 1, 2 and 3

Building Permits Level 1,2&3:
8,756 residential units (96%)
18.3M non-residential sqft (100%)



Reviewed PLUS Dev't Level 1, 2 & 3:
940 residential units (35%)
57,740 non-residential sqft (100%)

*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

Transportation

Transportation Improvement District (TID)		Forecast Year	Dwelling Units	
			SUPPLY	DEMAND
NEW CASTLE	Southern New Castle County	2040	8,607	20,697
	Easttown	2040	2,069	
	Westtown	2040	2,496	
	Newark	2045	1,959	
	Churchman's Crossing	2045	5,566	
KENT		2045	16,206	14,851
SUSSEX		2045	36,847	33,678
TOTAL			73,750	54,196

Total Land Area

-

SSPS "out of play"

2022 LULC residential / commercial / industrial / institutional

Wetlands

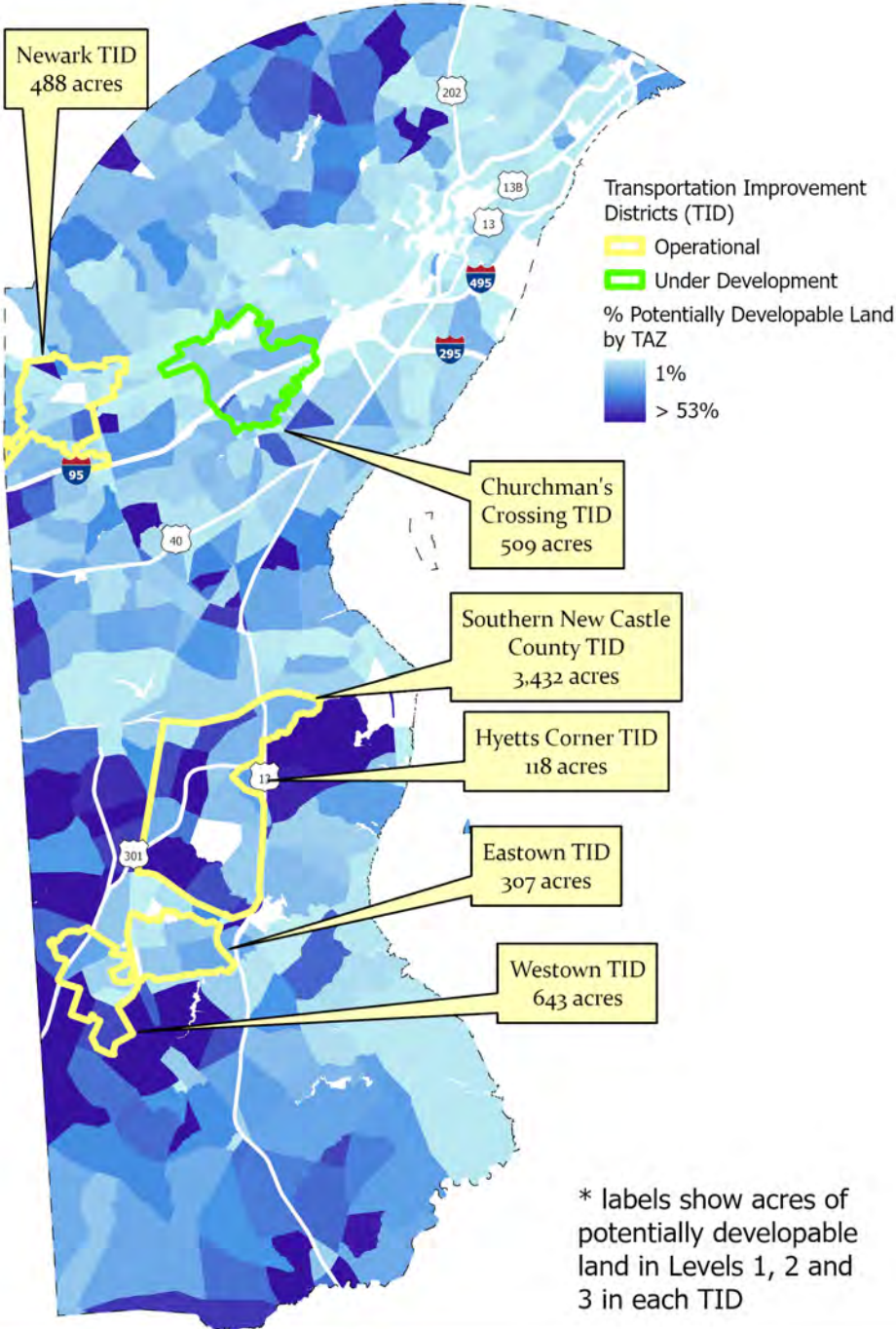
Impervious surface (NCC)

Manual QA/QC (i.e., remove subdivided but not yet built lots)

=

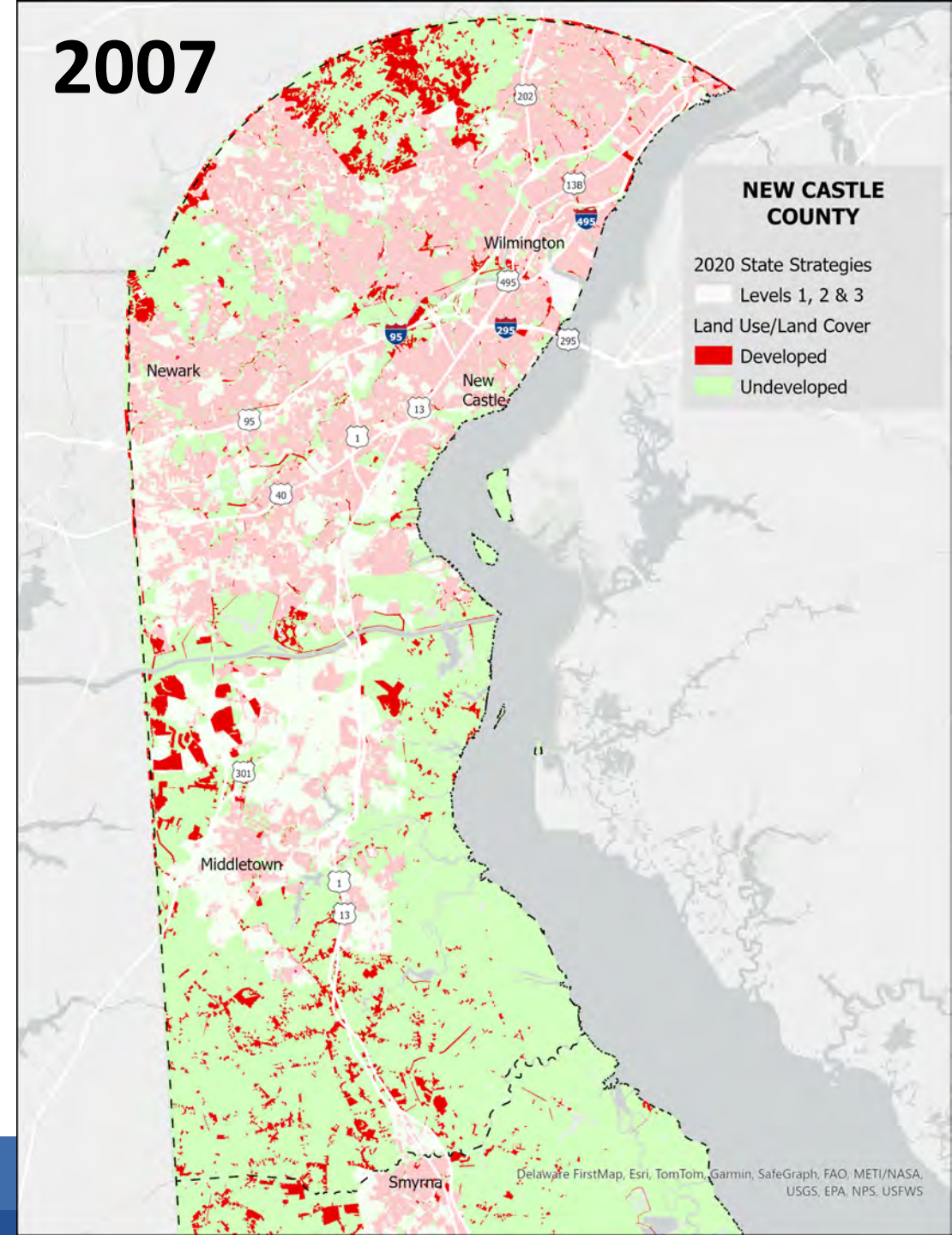
Developable Land Area

Percent of land developable (estimated by TAZ)



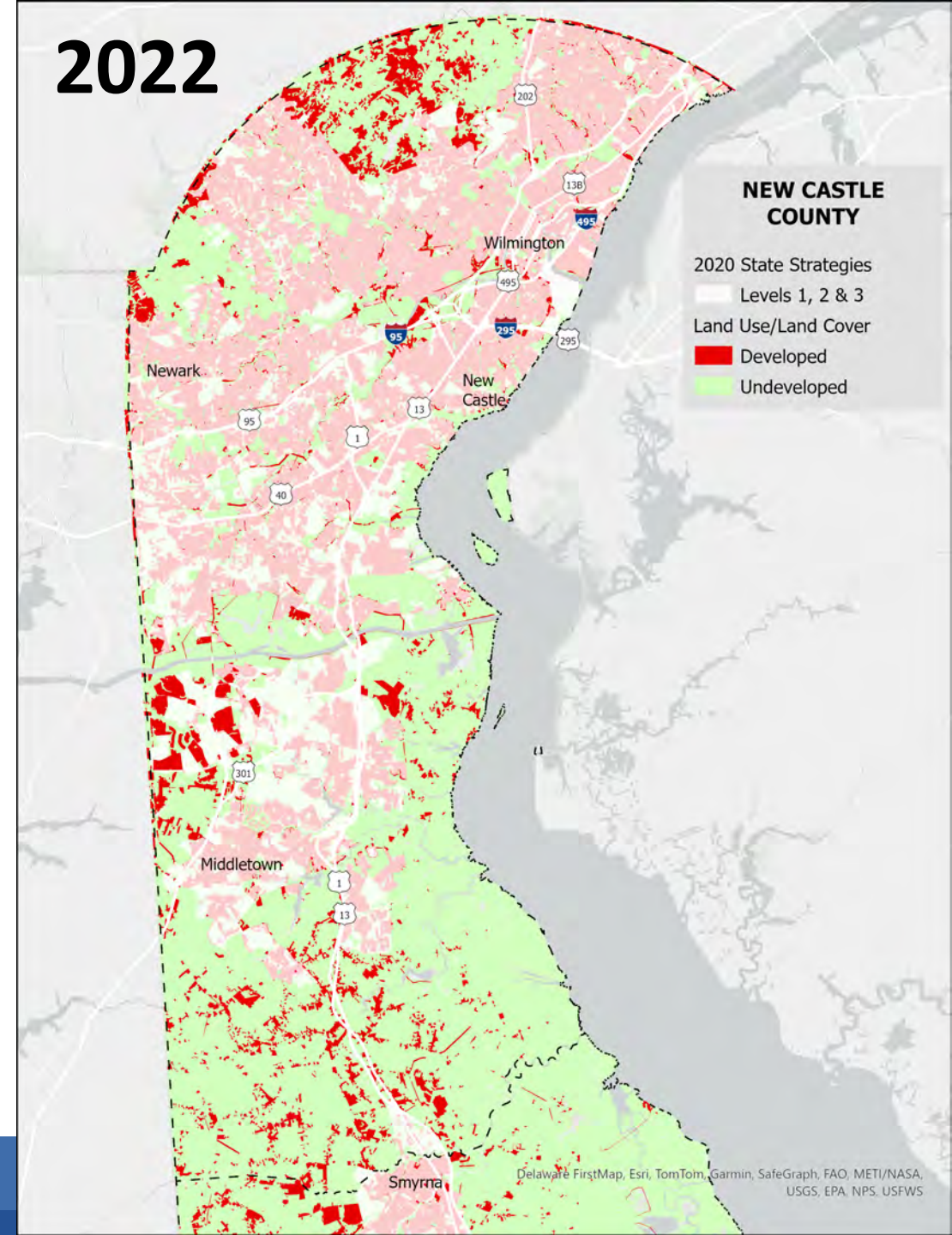
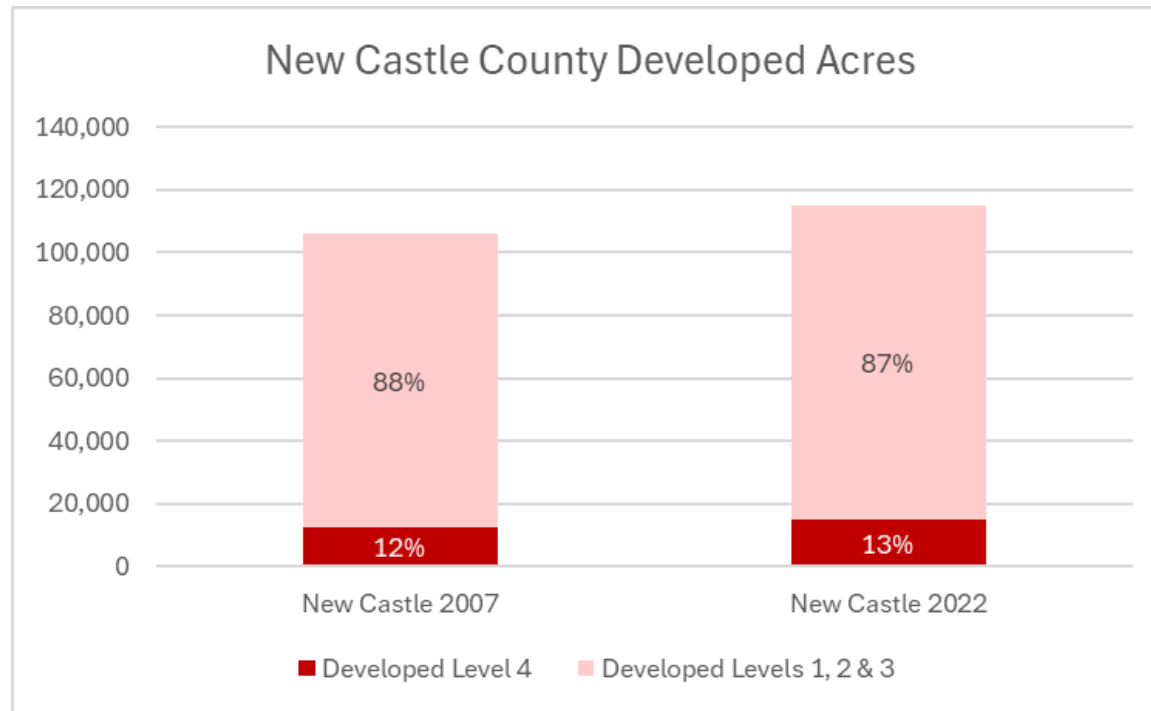
Developed Land

2007



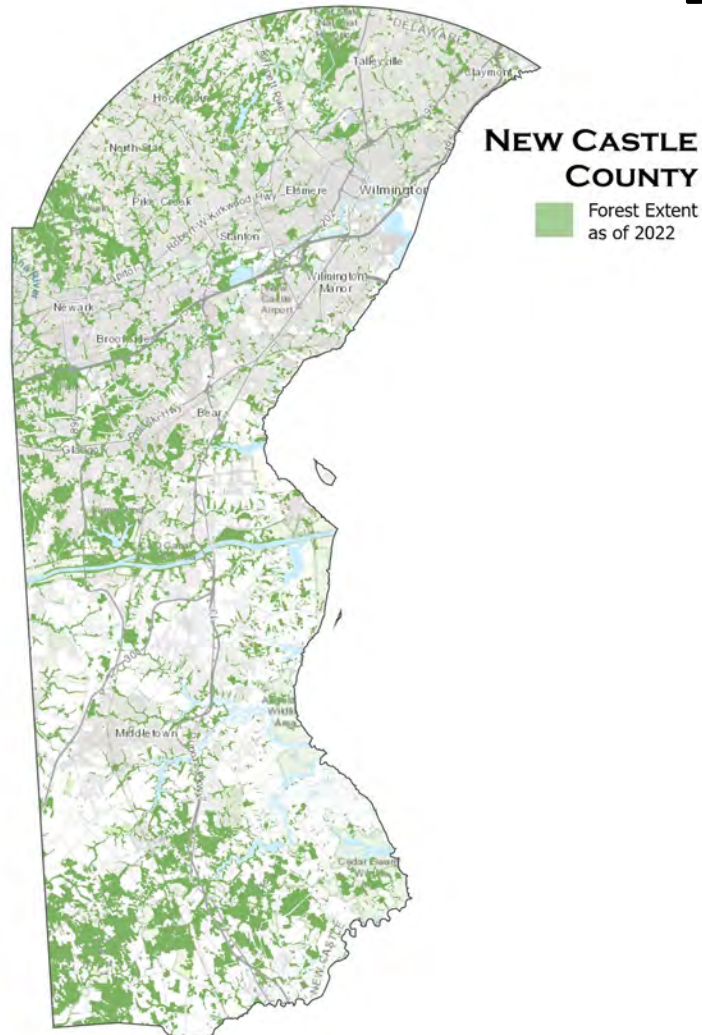
Developed Land

- Between 2007 and 2022, about 11,300 acres were developed in New Castle County
- About 2,700 acres of that occurred in Level 4 areas



Environment – Land / Resources at Risk

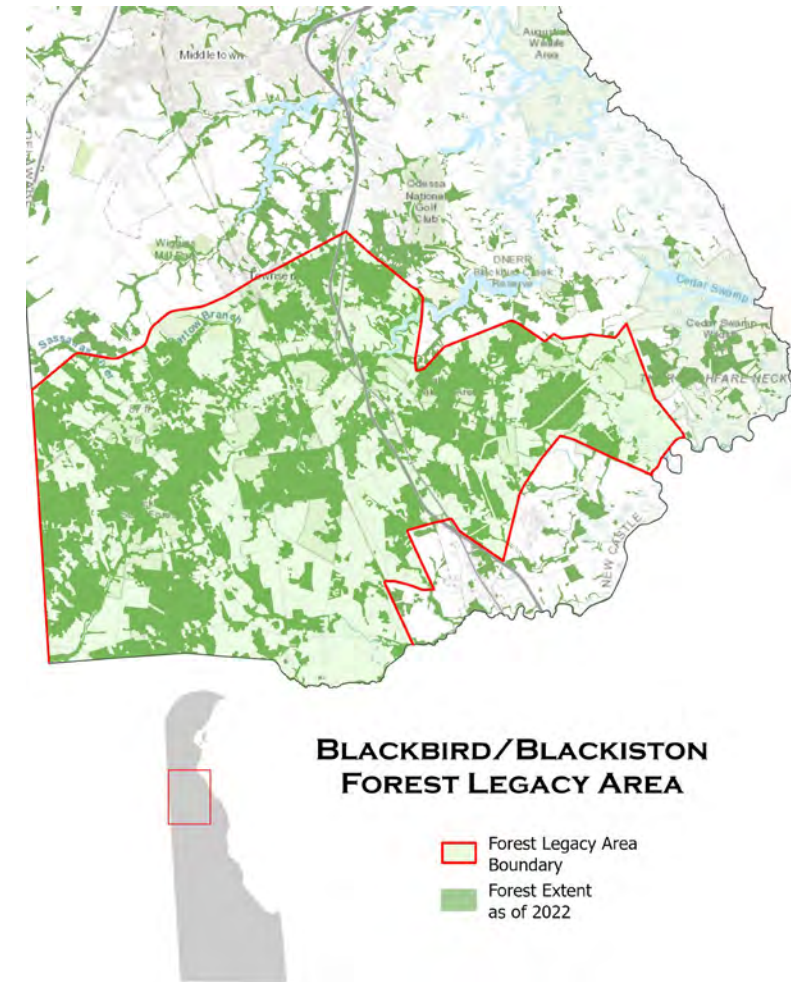
Delaware Statewide Forest Strategy



First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

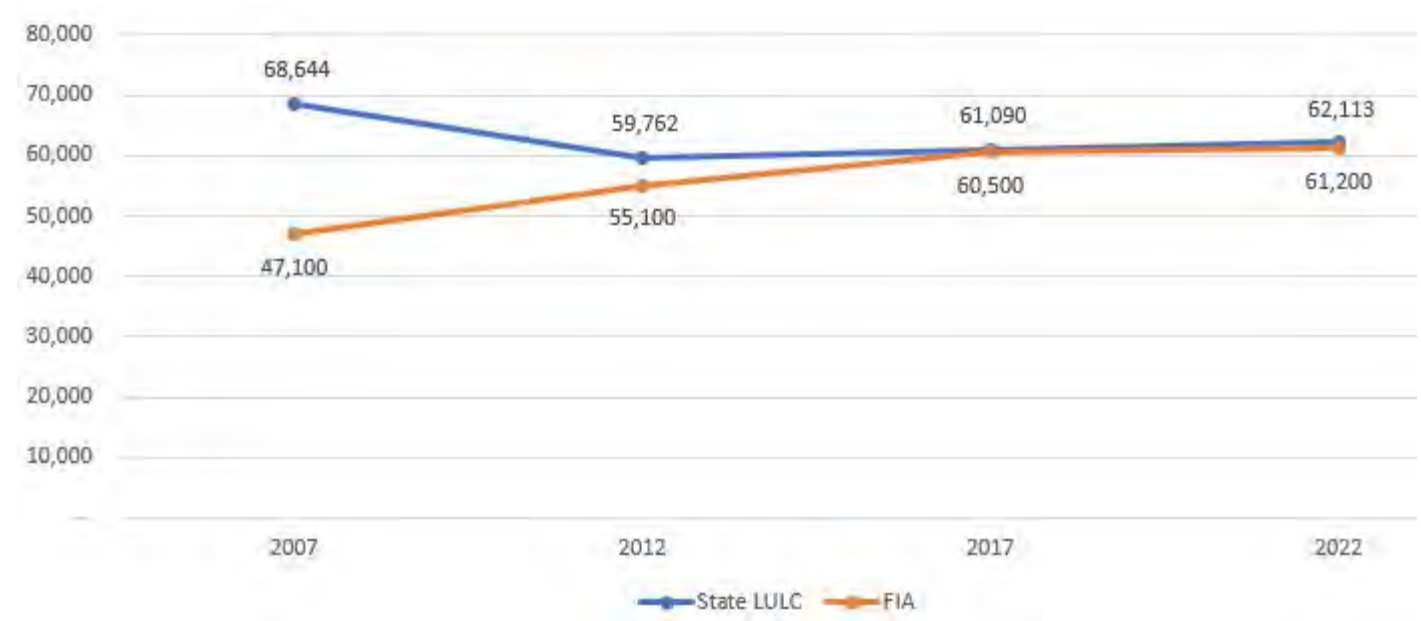
2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands



Environment – Land / Resources at Risk

Total Forest Acres by Year, New Castle County



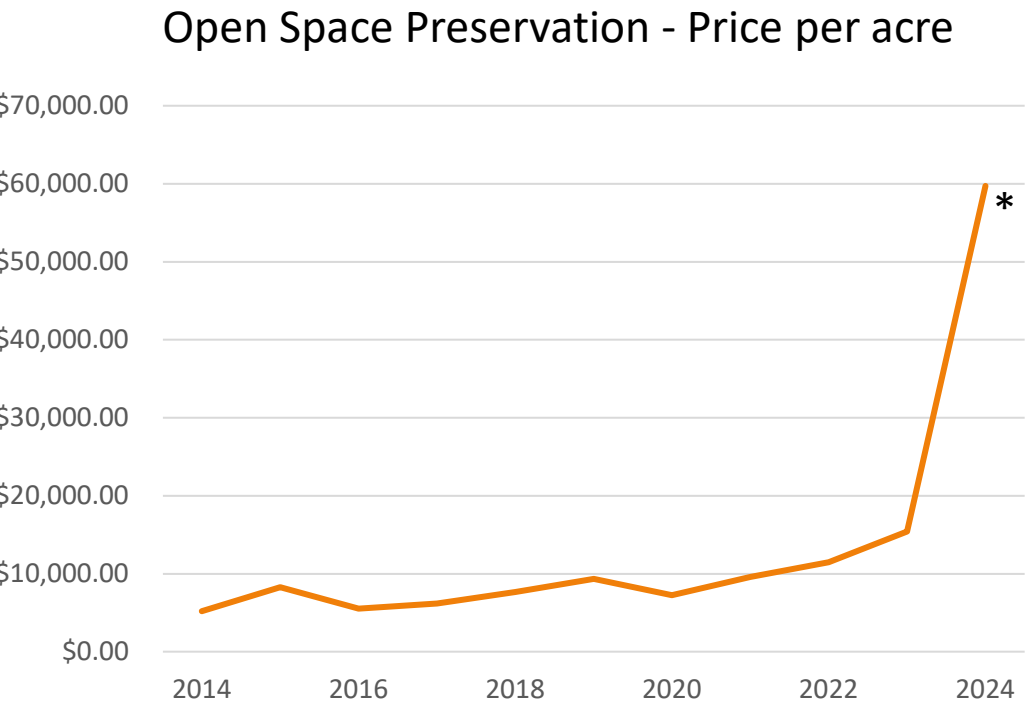
Land Use Land Cover data

LULC – Land Use Land Cover

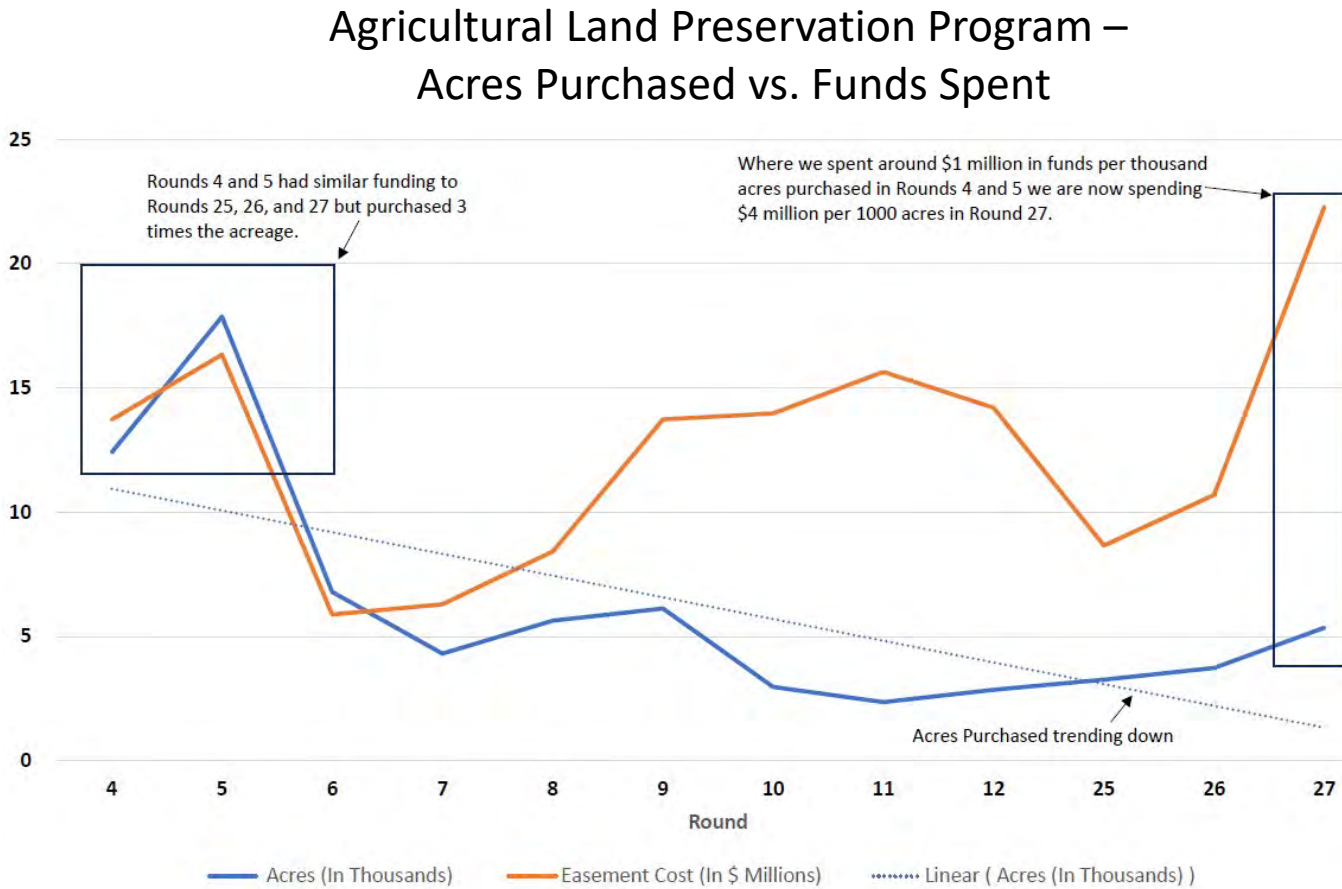
FIA - Forest Inventory and Analysis

Source: Forest Cover Data Analysis, 2024. Delaware Forest Service.

Environment – Preservation Efforts and Challenges

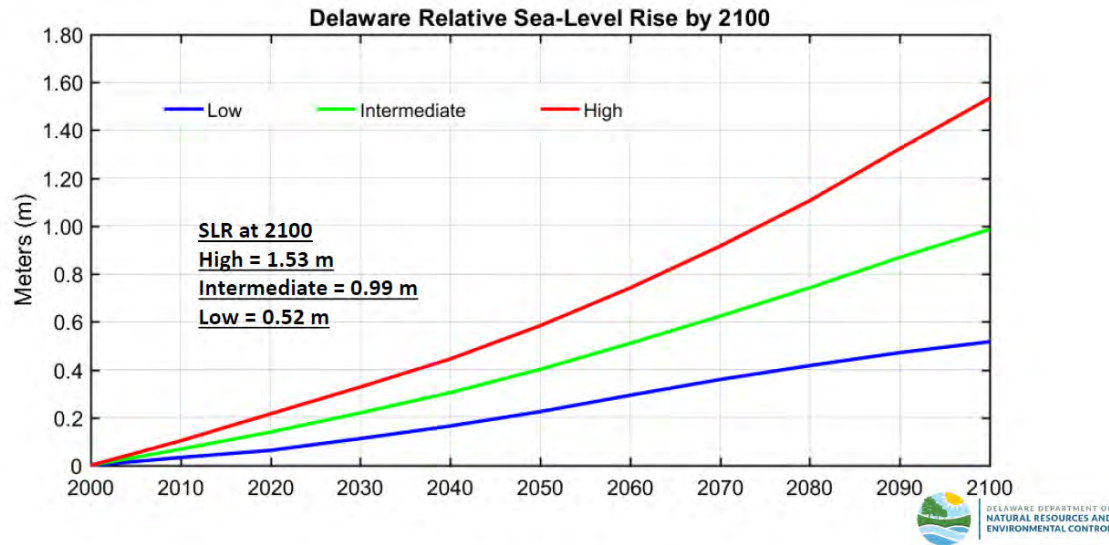


*Note: Price spike in 2023 and 2024 due to a key 285-acre land purchase adjacent to White Clay Creek State Park.



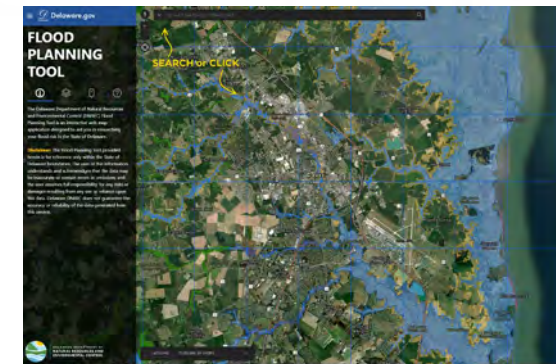
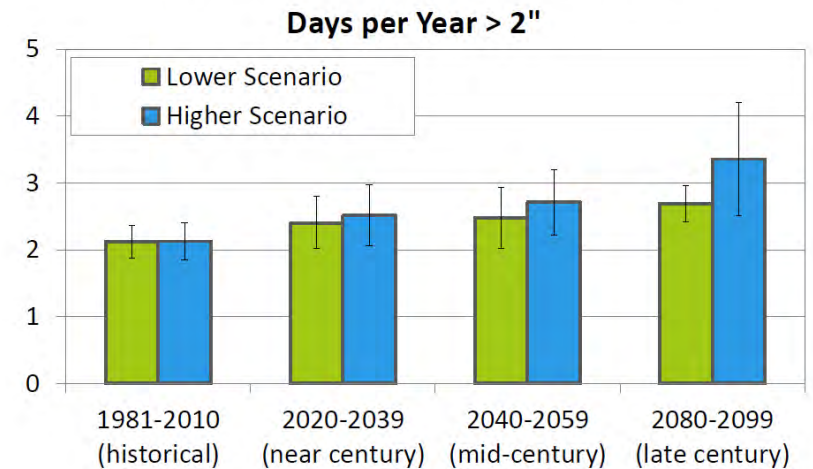
Environment – Resiliency and Adaptation

Sea Levels will continue to rise



- Marsh migration
- Saltwater intrusion
- Coastal development and infrastructure
- Accessibility – regular travel, emergency, and evacuation

Days with very heavy precipitation are expected to increase



Economy – Industry and Economic Development

Current industries:

Delaware total jobs: 625,328

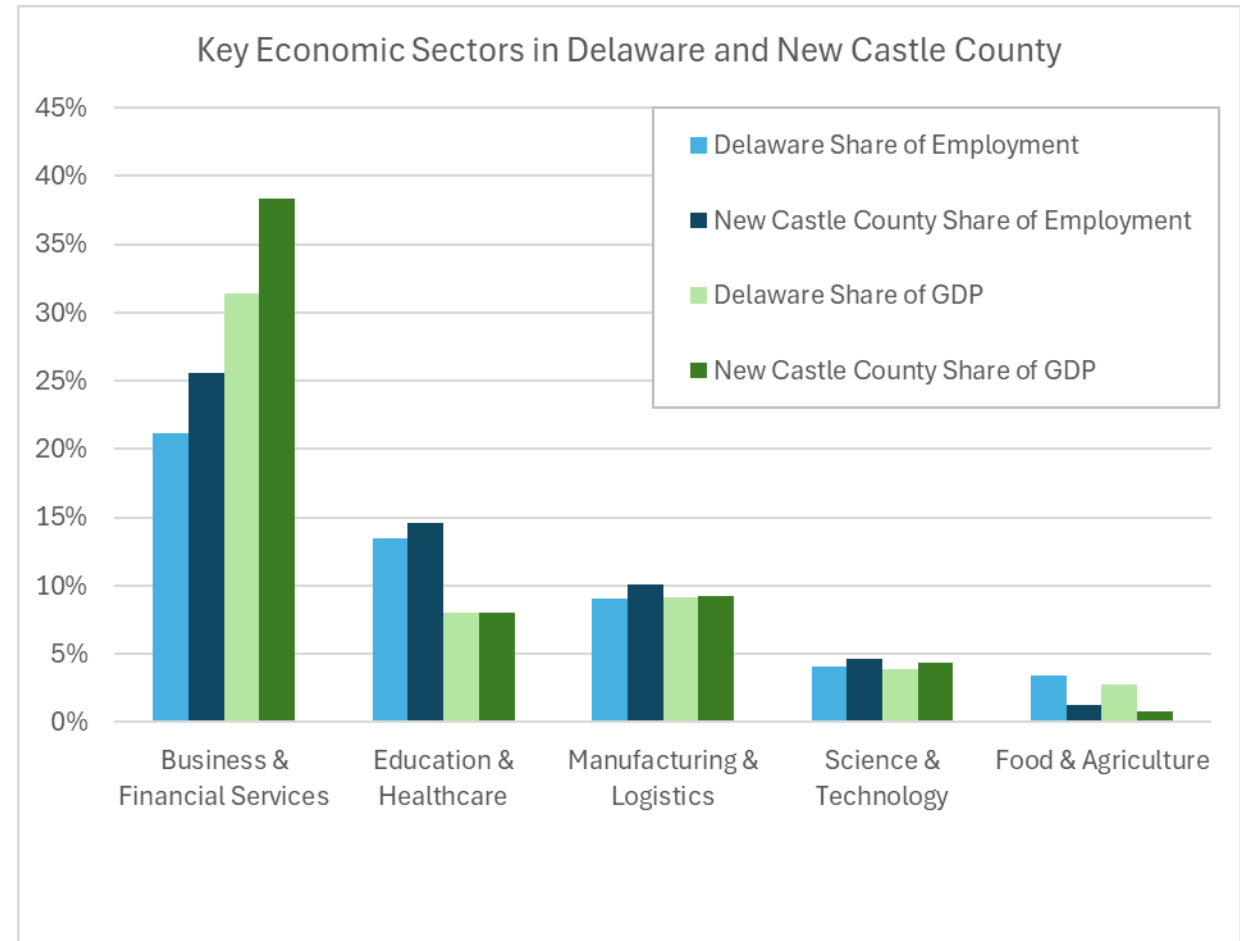
New Castle County total jobs: 360,255

Delaware total GDP: \$90.4 billion

New Castle County GDP: \$64.5 billion

Future industries?

- Fintech and associated sectors?
- Aviation and enhanced logistics?
- Green jobs and alternative energy?
- Biosciences and advanced industries?

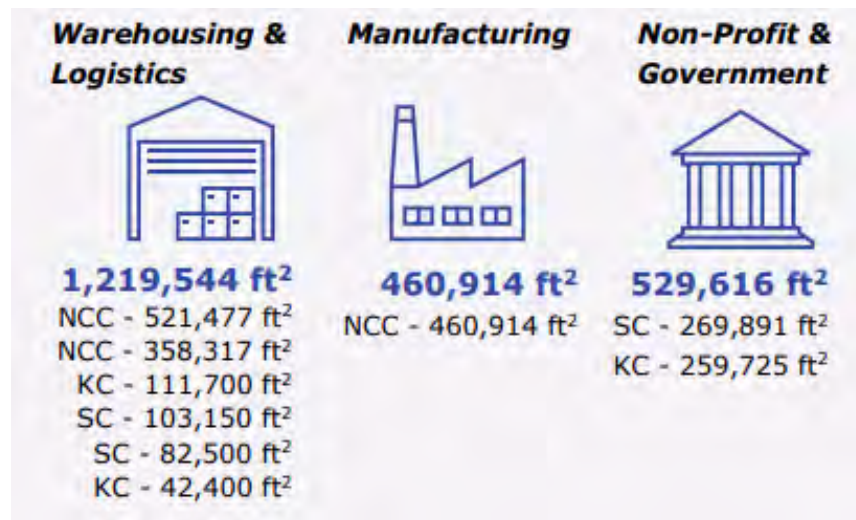


Economy – Concerns

- Land conversion
- Physical space needs
- concerns

- Nuisance issues
- Freight / transport

Three Largest Non-residential Projects in Each County by Type (2023)



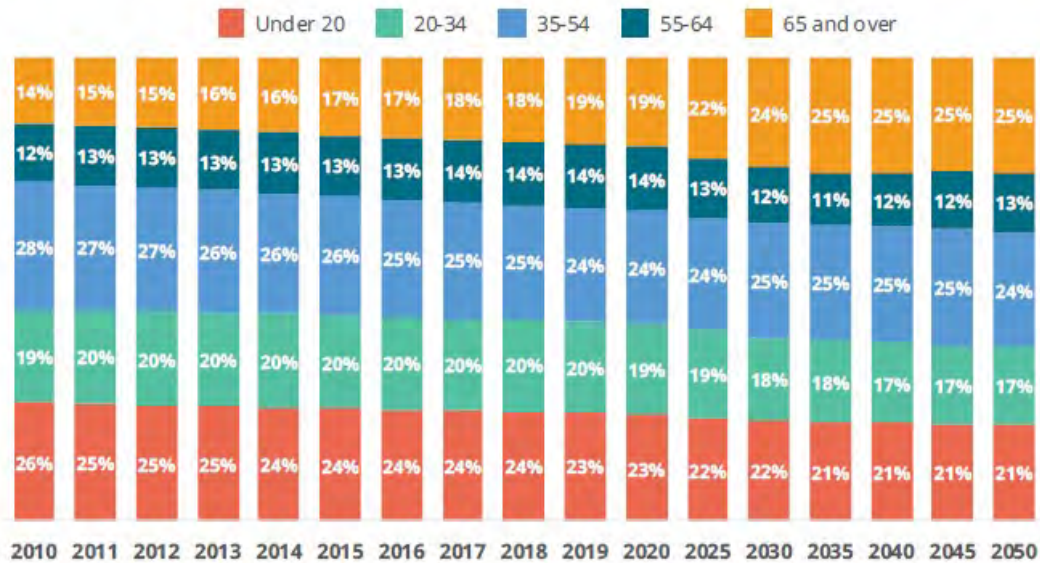
Nearly 900,000 SF warehousing / logistics permitted in NCC 2023

First/Final Mile Connection in Residential Area, Newark



Economy – Workforce

Population Projections by Age, Delaware, 2010 - 2050



- Labor force participation rate fell below national average in 2009
- Consistent decline in share of residents in prime working years may signal worker shortage.
- Low earning growth for health care and low-wage service workers may also make it difficult to maintain workforce needed to support senior healthcare needs.
- Further squeezed by housing shortage/ housing burdens

Public Assistance Trends, New Castle County

	2006		2022	
Total households	191,289		223,989	
With earnings	158,321	82.8%	175,867	78.5%
With Social Security	49,527	25.9%	69,056	30.8%
With retirement income	38,539	20.1%	61,005	27.2%
With Supplemental Security Income	5,495	2.9%	7,770	3.5%
With cash public assistance income	3,592	1.9%	4,825	2.2%
With Food Stamp benefits in the past 12 months	10,613	5.5%	22,724	10.1%

Housing – Statewide Needs



Delaware State Housing Authority

Statewide Housing Needs Assessment

PREPARED FOR:
Delaware State Housing Authority
Dover, DE 19901
www.destatehousing.com
888-363-8808

CREATED
November 2023



24,400*
new residential
housing units

are needed **by 2030** to
meet expected growth.



That's an
average of
2,400
new units
per year.

**These 24,400 units are in addition to the existing shortage of ~19,400 rental units affordable to households making 0-50% Area Median Income (AMI).*



**Where are these
residential units needed?**

4,016 New Castle County

6,941 Kent County

13,392 Sussex County

Over half of these new builds need to be affordable for households below 100% AMI...



12,723
new residential
housing units

must be affordable to households
making less than 100% AMI
(or \$66,400 for 2 people).

7,523
ownership units

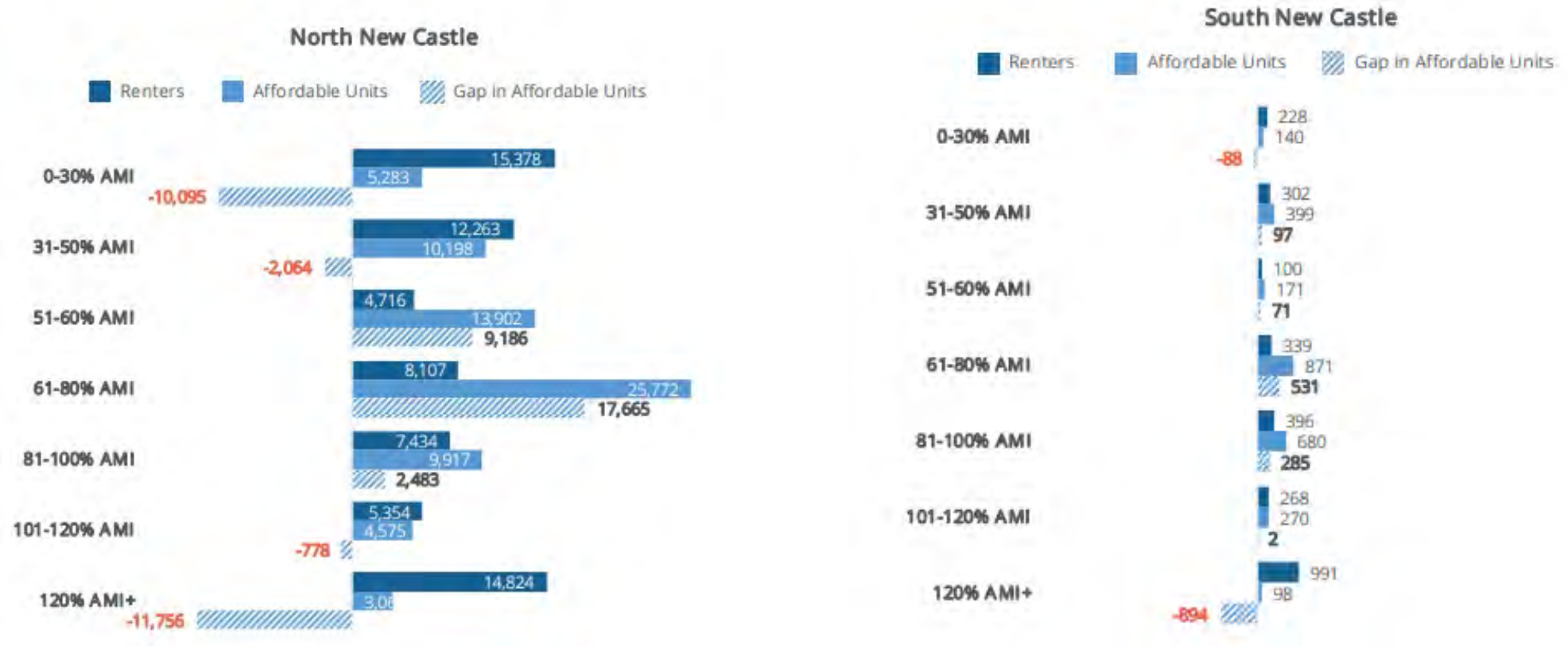


5,200
rental units



That's an average
of **1,200 new**
units per year.

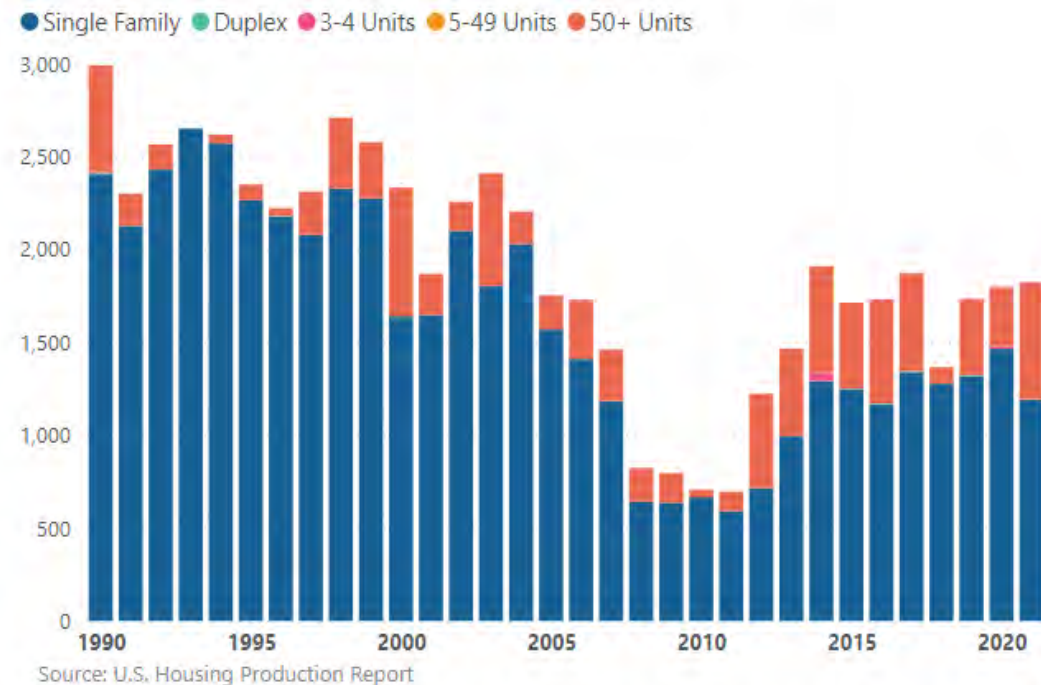
Housing



Statewide, the number of units needed to keep up with growth by 2030 are *in addition* to the current shortage of 19,400 units that are affordable to HHs making 0-50% AMI.

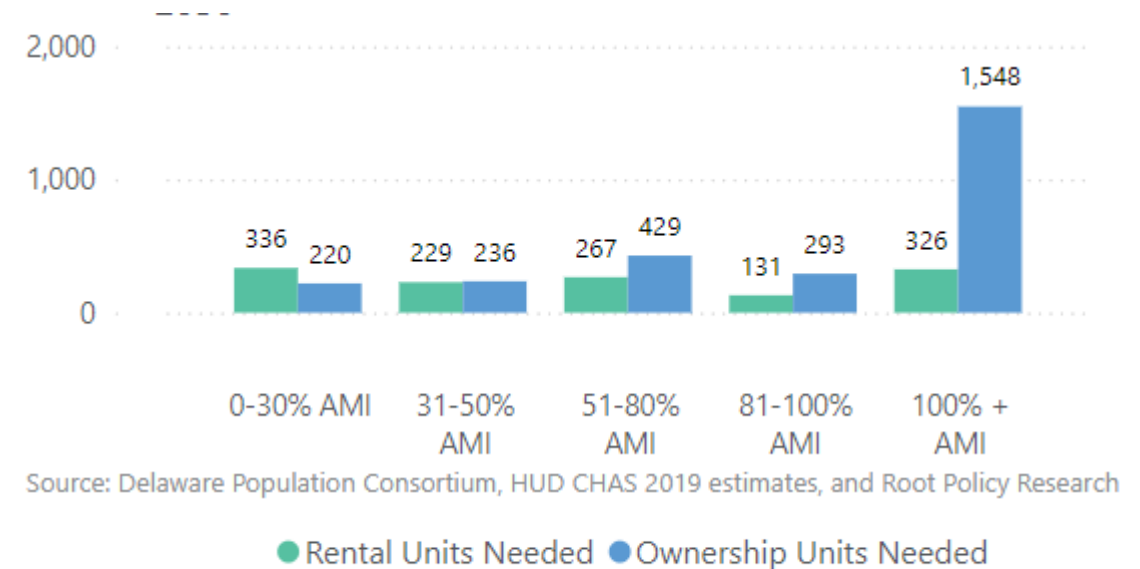
Housing – New Castle County

New Units Permitted by Structure Type, 1990-2021
New Castle County



Only about 25% of the permitted units over the last 5 years were multi-family units, which suggest a greater diversity of housing is needed in the county.

Projected new housing units needed by 2030:



Total: 4,016 units needed, of which:

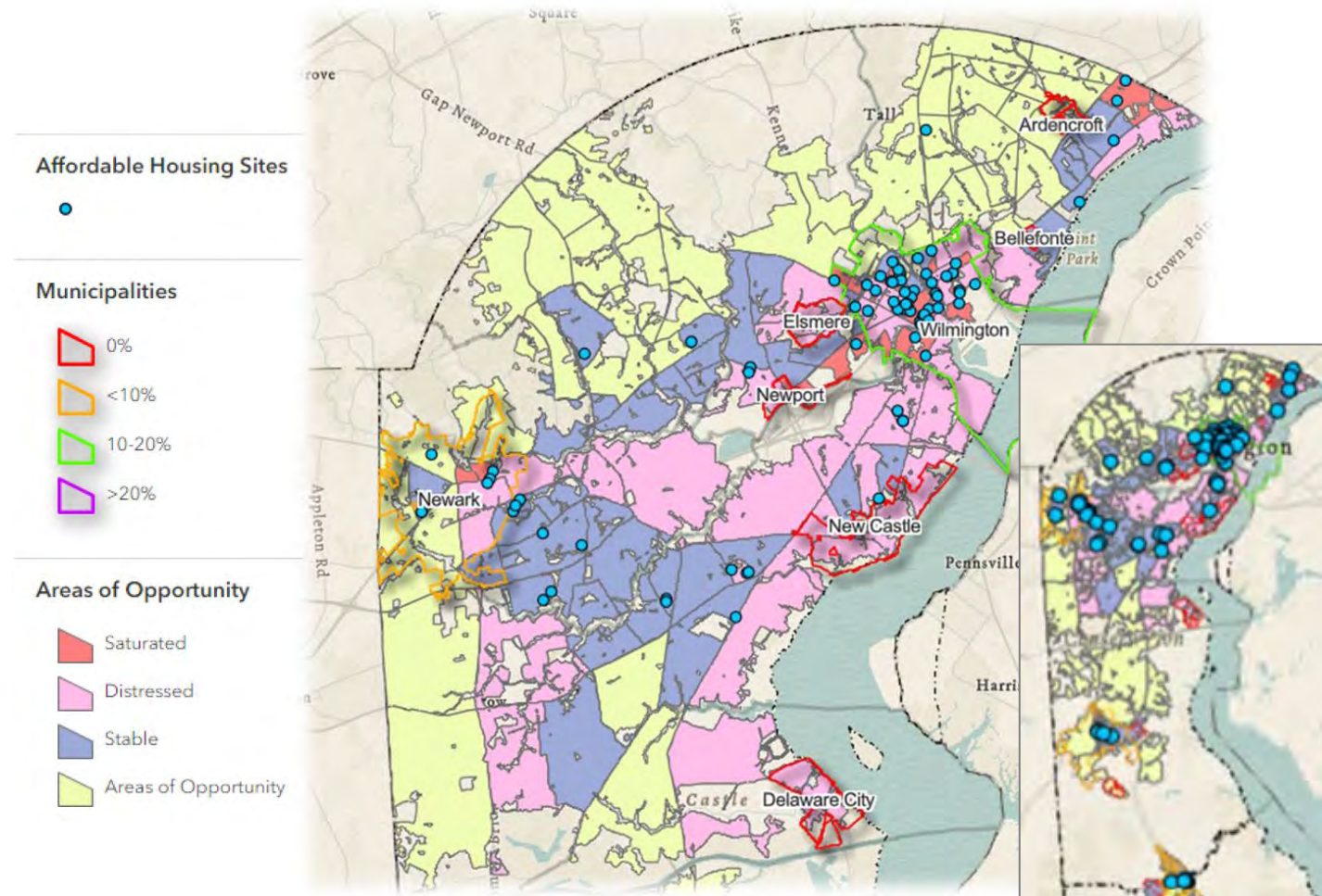
- 68% should be for homeownership
- 32% should be for renters

Housing – Strategies

Current distribution of affordable housing:

- Northern NCC:
 - Wilmington has disproportionate share
 - Yellow Areas of Opportunity have few affordable housing options
- Southern NCC:
 - Unincorporated land zoned almost exclusively single family detached housing – effectively prohibiting diverse housing types
 - Yellow Areas of Opportunity have zero affordable housing

Northern New Castle County





STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

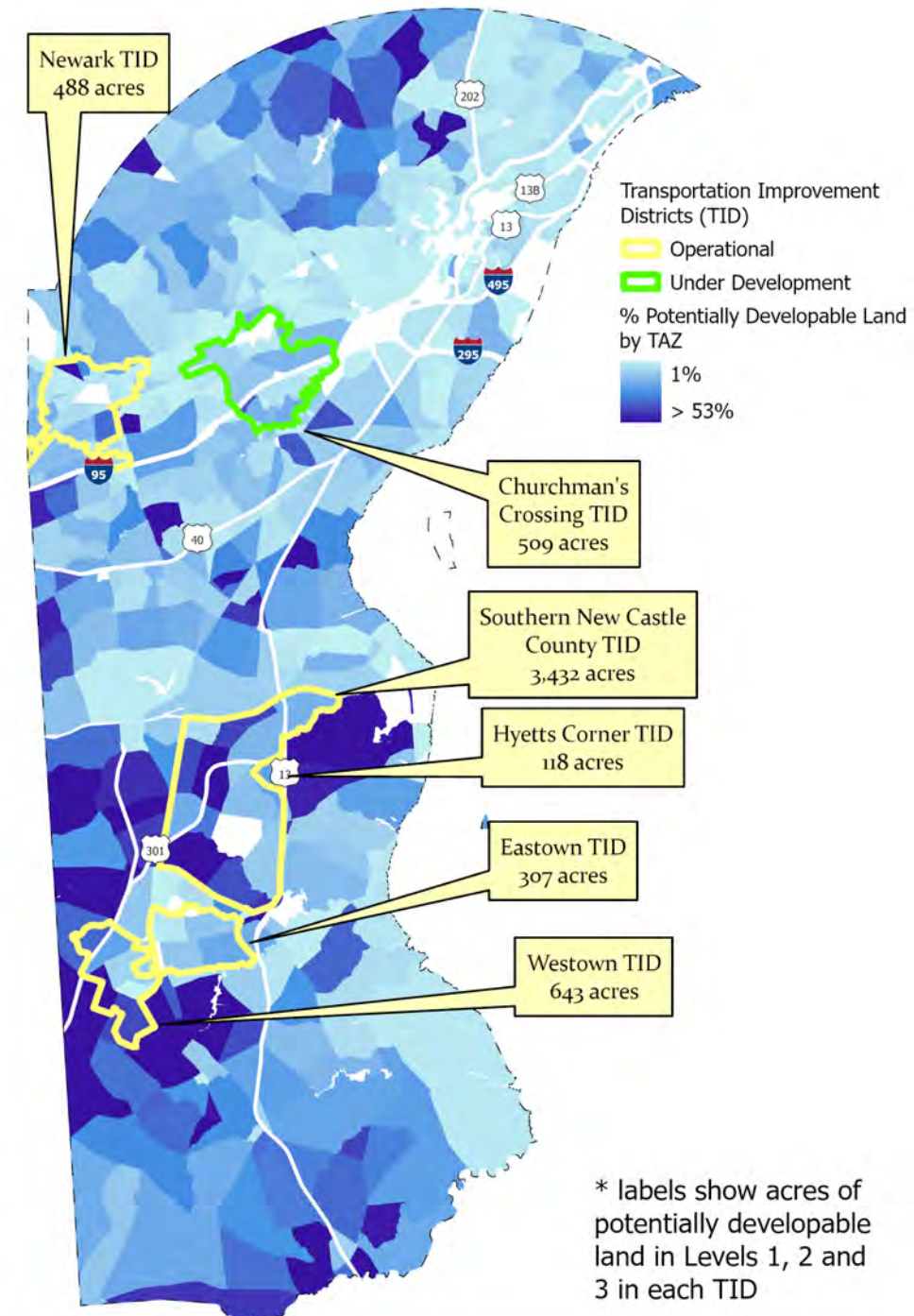
Conclusions and Discussion

What resonates? What is your experience?

Concluding Points

		Dwelling Units			
Transportation Improvement District (TID)		Forecast Year	SUPPLY		DEMAND
NEW CASTLE	Southern New Castle County	2040	8,607	20,697	5,667
	Eastown	2040	2,069		
	Westown	2040	2,496		
	Newark	2045	1,959		
	Churchman's Crossing	2045	5,566		

- Greenfield development in TIDs plus redevelopment and infill should accommodate significantly more development than what is forecasted by the Delaware Population Consortium



New Data Explorer



<https://stateplanning.delaware.gov/ccspi/data-analysis-workgroup.shtml>

 **State of Delaware**
Cabinet Committee on State Planning Issues
Data Analysis Workgroup

A place to explore the data being collected and analyzed by the Data Analysis Workgroup.

Each section below is where you can explore more of the data shared at the Data Analysis Workgroup meetings relating to [Transportation](#), [the Environment](#), [Economic Development](#), and [Housing](#).

[Other Planning Resources](#)

The Process

Understand the possibilities and how to get started, and then proceed to the next steps in the process.

- 1 Data Analysis Workgroup Formed**
The CCPI formed the Data Analysis Workgroup in the Summer of 2021 to review Delaware's current data and the 2022 State Strategic Update.
- 2 Data Collection/Exploration**
The Data Analysis Workgroup has worked with many State agencies to explore data in various and various ways, including data visualization and data analysis.
- 3 Stakeholder Outreach**
The Data Analysis Workgroup is working with various stakeholders to explore data in various ways, including data visualization and data analysis.
- 4 2022 State Strategic Update**
The Data Analysis Workgroup is working with various stakeholders to explore data in various ways, including data visualization and data analysis.

Transportation

Explore data on transportation issues impacted by development.

Transportation Improvement Districts

Transportation Improvement Districts (TID) provide the transportation improvements needed to support the development in both the State and the region. The TID is a public-private partnership that provides a framework for the development of transportation infrastructure and services. The TID is a public-private partnership that provides a framework for the development of transportation infrastructure and services. The TID is a public-private partnership that provides a framework for the development of transportation infrastructure and services.

[TID Dashboard](#)

Transportation Operations Management Plan (TOMP)

The TOMP is a Delaware Department of Transportation (DelDOT) document that provides a framework for the development of transportation infrastructure and services. The TOMP is a public-private partnership that provides a framework for the development of transportation infrastructure and services. The TOMP is a public-private partnership that provides a framework for the development of transportation infrastructure and services.

[TOMP Report](#)

DelDOT Dashboard

DelDOT has created a dashboard that provides a framework for the development of transportation infrastructure and services. The dashboard is a public-private partnership that provides a framework for the development of transportation infrastructure and services. The dashboard is a public-private partnership that provides a framework for the development of transportation infrastructure and services.

[Explore Dashboard](#)

Questions or Comments?

Email: Strategies@delaware.gov



STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

New Castle
County

DEPARTMENT OF
LAND USE



Proposed Changes to Redevelopment

- Permits Redevelopment Plans to seek variances if the application includes improvements consistent with the Guiding Principles
- Reduces the gross floor area required in Commercial Neighborhood and Office Neighborhood districts from 50% to 15%
- Reduces impervious surface areas for redevelopment plans by limiting parking to 115% of the minimum parking for the site.
- Areas identified as Corridor Areas in the Comprehensive Plan must include improvements consistent with the Guiding Principles



Proposed Changes to Redevelopment

- Removes the requirement for demolition of gross floor area in Type 1 Commercial Corridors and Community Development Areas (Rt 9 and Claymont)
- Clarifies that existing gross floor area on extractive use and Brownfield sites do not need to be demolished.
- Incentivizes the preservation of historic resources by allowing the historic structure to be credited to reduce the required gross floor area to be demolished
- Expands the types of improvements that a development can take redevelopment credit to include energy efficient design and improvements in the Guiding Principles.



Corridor Development Incentives

Type 1 Commercial Corridor Areas

1. Expand redevelopment opportunities along the Type 1 Commercial Corridors
 - Plans are reviewed as redevelopment plans without requiring the demolition of existing gross floor area.
2. Consistent with the Guiding Principles





Ordinance 24-087 ADUs

- Reduce the acreage requirement for detached ADUs from 2 acres to 0.5 acres
- Remove the cap on the number of ADUs in the County
- Permit Small Single-Family homes (400-750 sf) as ADUs



Pocket Neighborhoods Ord. 24-137

COMMUNITY SERVICES
COMMITTEE

MEETING

NOVEMBER 26, 2024



Appendix C: Sussex County Workshop Documentation



STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES

Data Analysis Workgroup

Building Collaborative Perspectives on Growth and Development
Sussex County Workshop
December 18, 2024

Meeting Summary
Approved January 10, 2025

Workgroup Members Present:

Nicole Majeski, Secretary, Department of Transportation, Chair
Emily Cunningham, Delaware State Housing Authority
Dan Blevins, WILMAPCO
Kyle Hoyd, Department of Agriculture

1. Secretary Majeski brought the meeting to order and welcomed the stakeholders (Attendance list attached)
2. Andrea Trabelsi presented the Powerpoint (attached)
3. Jamie Whitehouse, Sussex County Planning Director shared slides on most recent County building trends (attached)
4. Stakeholders broke into 4 breakout groups: Transportation, Environment, Economic Development and Housing. Stakeholders rotated between groups, participating in all four topics. A summary of the breakout group discussions follows:

Overarching Themes and Feedback:

Feedback related to data and the development of the State Strategies:

- Additional data on the impact of tourism on Sussex County is available from the Southern DE Tourism Office
- The County will share updated building permit data in early 2025. This data shows that building permit applications slowed/plateaued in 2024.
- County would like to discuss expanding the radius surrounding libraries that are favored for growth from 1 mile to 3 miles, in addition to reviewing the radius for other essential public amenities
- Include distance between jobs and houses, wages, and taxes in employment area planning

Key Ideas Raised Across Topics:

- More collaboration and direct engagement is desired between state and local governments
- Increase enforceability of the State Strategies and consistency across agencies
- Statewide plans for climate risk and transportation
- Public education and awareness: Increase public awareness (including public officials) and understanding of preservation, climate change, affordable housing, and the need for planning



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Transportation Breakout Group

Q1. How can the state work with county and local governments to help guide new development towards Transportation Improvement Districts (TIDs) and other designated growth areas?

Q2. How should transportation infrastructure proposed outside of TIDs, and other designated growth areas be addressed and funded?

Planning and Coordination

- Develop a countywide comprehensive transportation plan that is consistent with State Strategies and is enforceable
 - Customized approach for each county as needed
 - Give state the right to say No
- Consider an MPO
- More communication and partnership throughout the process
- All state policies need to reinforce the growth areas consistently

Incentives and Funding

- Explore how the state can transfer more infrastructure responsibility to counties and local governments/provide options for local governments to pay
- Bring state, county and muni together to consider how to pay for improvements
- Consider a TID funding stream and a statewide funding stream
- State funding formula needs to be looked at overall because of downward trend
- Streamline approval processes for redevelopment/projects within growth areas and provide incentives to equalize less expensive development in L4 areas
 - Rural impact fees
 - Offsite transportation cost per unit needs to equal or exceed that inside of a TID

TID Process Improvements

- Request for more info on the TID dashboard (e.g., Henlopen - LOS and specific intersections)
- TID is a good concept and there has been a learning curve; the confidence (predictability, timing, cost) is not there yet and developers are unsure of/not seeing the incentive
- What metrics are used to measure “success” of the program?
- Look at overall corridor capacity and not just TIDs



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Data Analysis Workgroup

Environment Breakout Group

Q1. What are the barriers and opportunities to more effectively protect and preserve important ecological resources, open space, and farmland?

Data

- Accurate baseline of what's been preserved

Policy and Funding

- Need consistent and complementary policies between DDA and DNREC
- Consider tax incentives for forestry easements
- Increase incentives and funding overall
- Evaluate farmland preservation program to ensure preservation incentives are equal to those to development
- Proactive outreach to remaining farms
- Research question: Is farming still profitable

Regulations and Incentives

- TDRs (transfer of development rights)
- Regulations favor development over preservation; do not have to show environmental costs in development
- Incentives for privately owned preservation, increasing density, and avoiding wetlands
- Support eco-tourism
- Balance: tourism vs protection of bays

Public Education

- Increase public awareness (including public officials) and understanding of the importance of tax ditches, ag preservation, and wetlands, and buffers;
- Education on what density really looks like/means

Q2. How should state capital resources be invested in areas with increased risk of damage from more intense storms, flooding, sea level rise, and other hazards?

State and Federal funding

- Build out a state resiliency fund for climate-related projects
- Incorporate increases for environmental taxes to use towards mitigating climate risks
- Decrease reliance on federal funding and FEMA and explore state-level opportunities to increase funds for climate resiliency
- Explore untapped federal grant opportunities

Proactive, long-term planning to face climate change and flooding

- Support of low income, at-risk communities
- Plan for and invest in planned retreat
- Long-term plan for dredging and beach replenishment



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Data Analysis Workgroup

- Explore a collaborative approach to cost sharing for beach replenishment and dredging; towns cannot be increasingly responsible
- Reconsider level 1 designations for areas inside the 100-year floodplain
- Ensure the state follows the rule of not building in floodplains

Homebuyer and Community Awareness

- Mandate real estate disclosures of flood zones and sea level rise to prospective homeowners
- Community and new homebuyer awareness of location risks and understanding of coastal area living, tides, septic maintenance, plantings, tax ditches
- Create awareness and prioritize environmental concerns

Economy Breakout Group

Q1. What land and infrastructure assets should be preserved and enhanced to support the needs of current and emerging businesses and industries? How might the State best incentivize this?

- Work with counties to identify key future industries. Aviation? Biotech, emerging sciences

Infrastructure Needs

- Site readiness fund - infrastructure assets
- Sewer: Need funding from the state to expand/upgrade sewer systems
- Transit - expansion of DART (focus on southern part of state, lower income areas, and connectivity that supports commerce); more pilot programs
- Additional sources of electricity to bring prices down; nuclear plant in DE
- High speed internet/5G and cell service (to attract workers)
- Explore east-west corridors

Agriculture, Tourism, and Industrial lands

- Diversify and strengthen farming with greenhouses, other revenue streams, ag/ecotourism;
- Support speed to market
- Continue funding Agland Preservation and supporting young farmers
- Plan and funding for maintaining open waterways for recreation (dredging)and beach replenishment
- Preserve existing industrial lands and reserve land along the rail lines and around airport

Other

- Interest-free loans to businesses
- Streamline agency processes



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Q2. What investments are needed to attract and retain a workforce that both serves the needs of an aging population and fuels a competitive economy?

Affordable Housing & Transportation/Transit Needs

- Incentives/subsidies so people can live where they work
 - Workforce housing assistance for builders
 - Partner with industry to support employee transportation, housing subsidies,
- Zone for tiny houses, mixed-use/cluster development; rethink mobile homes
- Increase the supply of housing close to employment to reduce commute time

Education & Talent Development

- Medical school
- Need more vets for farm animals- provide incentives to come/stay
- Culinary school and hospitality industry
- Greater higher education presence (UD/DelTech/SEED)

Economic Growth & Workforce Development

- Provide incentives such as student loan forgiveness for relocating and remaining in DE
- Improve salaries

Other

- Job assistance for spouses who relocate
- Higher pay for needed skills
- High state fees or taxes for those moving here to put into different funding areas: incentives, support for Invest in data on future trends in transportation and housing, including housing biases

Housing Breakout Group

Q1. How can the State work with local governments to facilitate the development of diverse housing that meets residents' affordability needs?

Q2. What are the barriers to and opportunities for increasing mixed residential development in SSPS levels 1 through 3?

Incentives

- Expedite and streamline affordable housing projects, along with the supporting roads and infrastructure
- Expand the DDD
- Support the infrastructure for affordable housing projects (state does, county could help)
- Review rental laws to balance landlord protections



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Data Analysis Workgroup

- Provide financial incentives to municipalities that score high on a menu of affordable housing strategies
- Financial incentives need to come from the state
- Incentives to provide seasonal housing, instead of a short term rental
- Use public-private partnerships
- Be creative, participate in more pilot projects (Dutchmans Harvest)
- Create a site readiness fund to help developers offset upfront costs, impact fees, off-site and entrance costs, etc. and concentrate the fund in level 1 through 3. The fund could be created with part of the Accommodation Tax.
- Statewide Land Bank/TDR bank

Zoning Reform

- Create a menu of options for municipalities to consider
- Rethink mobile homes and tiny houses
- Help municipalities to update their ordinances
- Mandate/Incentivize inclusionary zoning and diverse housing types; allow increased height
- Require affordable housing as part of rezonings, conditional uses and/or certain types of districts/developments
- Ensure affordable housing is not being built in high-risk areas, including floodplains and are of high quality construction

State Strategies/PLUS

- Enable greater enforcement of the Statewide Strategies
- Enforce proactive rezonings
- Provide guidance for how local comp plans should address affordable housing and add a minimum requirement for State approval
- Make sure PLUS process seems meaningful - saying No when warranted gives it more credibility

Public Education

- Educate decision-makers and the public on housing needs and clarify affordable housing types, relationship to services and needs

Additional comments

Following the meeting, a workshop participant provided additional comments requesting clarification on demographic, development, and economic trends cited in the presentation. Discussions surrounding such questions are anticipated to continue with various stakeholders during the data gathering and development of the State Strategies.

Sussex County Sign-In Sheet

✓	Name	Organization	Breakout Group
	Jamie Whitehouse	Former Director, Sussex Planning and Zoning	County
	Todd Lawson	County Administrator	County
	Brandy Nauman	Director, Sussex Community Development	County
	Bill Pfaff	Director, Economic Development Sussex County	County
	John Rieley	Councilman, Sussex County Council	County
	Timothy Cooper	Deputy Director, Public Safety-Emergency Management	County
	Robbie Murray	Director, Department of Public Safety	County
	Gene Dvornick	Town Manager, Georgetown	Transportation
	Kim Blanch	Director of Community Outreach, Beebe Healthcare	Transportation
	Richard Borrasso	Co Founder, SARG	Transportation
	Mark Chura	Executive Director, Sussex County Land Trust	Transportation
	Kristy Rogers	Town Manager, Milton	Environment
	Joe Pika	Sussex Preservation Coalition	Environment
	Michelle Koenig	Director, Conservation and Watershed Planning. DE Center for the Inland Bays	Environment
	Amy Walls	Senior Principal, Discover Financial Services	Environment
	Jamie Smith	Town Manager, Laurel	Economy
	Scott Thomas	Executive Director, Southern Delaware Tourism	Economy
	Doug Motley	Managing Principal, JLAM	Economy
	Danielle Swallow	Coastal Hazards Specialist, RASCL/PDE	Economy
	Stephanie Moody	Association Executive, Sussex Association of Realtors	Housing
	Preston Schell	CEO, Ocean Atlantic Companies	Housing
	Katie Millard	Sussex County Habitat for Humanity	Housing



STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

Building Collaborative Perspectives on Growth and Development

December 18, 2024 | Sussex County

Agenda for Fall 2024 Workshops

Objectives:

Build awareness

Share data-driven
information

Gain common
understanding
and consensus

- | | |
|---|-----------------|
| I. Welcome | (10 min) |
| II. CCSPI Data Analysis Workgroup presentation | (30 min) |
| III. Q & A | (5 min) |
| IV. County presentation | (15 min) |
| V. Open discussion | (10 min) |
| VI. Break | (10 min) |
| VII. Breakout groups | (60 min) |
| VIII. Gallery Walk/Break | (15 min) |
| IX. Large group recap | (10 min) |
| X. Public comment | (10 min) |
| XI. Next steps | (5 min) |



State Perspective Presentation

I. State Planning Overview – role of State and Local Governments

II. Data-backed insights

III. Further into the data





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I. State Planning Overview

Planning policy and practices in Delaware

State Planning Role



STATE STRATEGIES FOR
POLICIES AND SPENDING
DOCUMENT AND MAP



REVIEW LOCAL
GOVERNMENT
COMPREHENSIVE PLANS

FORWARDS REPORT AND
RECOMMENDATION TO
GOVERNOR FOR
CERTIFICATION *



ORGANIZE COMMENTS FROM
STATE AGENCIES VIA THE
PRELIMINARY LAND USE
SERVICE (PLUS)



PROVIDE TECHNICAL
ASSISTANCE



Like those stationed in the lookout towers, keeping their eyes on the horizon...

Local Planning and Coordination



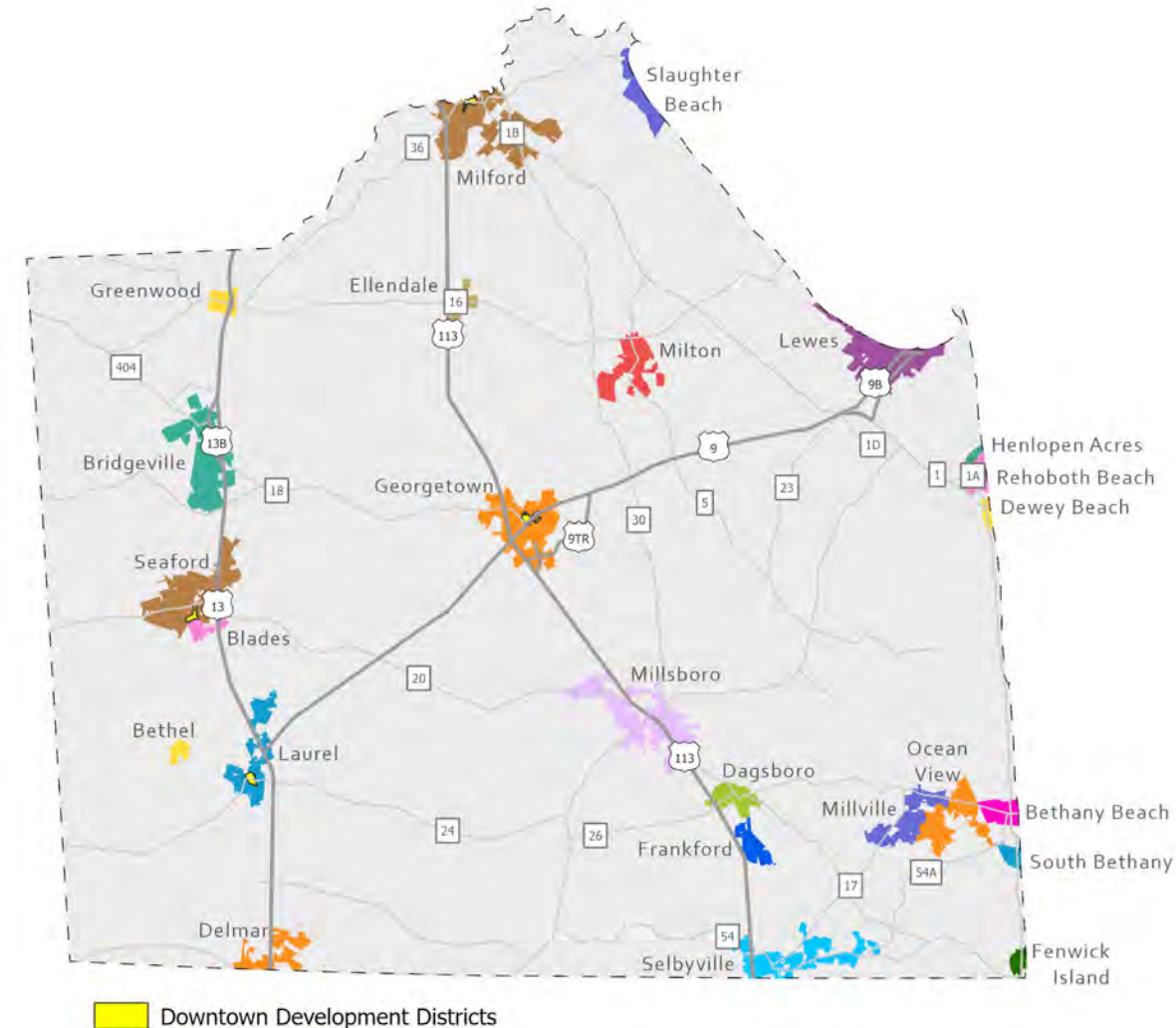
Title 22 requires all municipalities to prepare comprehensive land use plans

Text and maps have the “force of law”



Title 9 requires county governments to prepare comprehensive land use plans

Map or Map Series has “force of law”



State Funding for Infrastructure and Services



90%

Public School
Transportation



85%

State Roads



100%

State's Largest
Police Force



60–80%

Public School
Construction



60%

Public School
Operations



30%

Paramedics

*Delaware at or near the top of state share
of all government spending:*

Table 1-4. State Share of Spending in Delaware, Neighboring States, and the United States, 2005

Jurisdiction	State Share of Spending as a Proportion of All Government Spending on Select Items (Rank Among States)			
	Highway Spending	Parks and Recreation Spending	Police Protection Spending	Total Spending
Delaware	81.0% (5)	57.6% (1)	35.3% (2)	78.0% (7)
Maryland	67.3% (19)	9.5% (37)	21.1% (15)	64.9% (29)
New Jersey	62.6% (28)	44.3% (3)	16.8% (27)	63.6% (32)
Pennsylvania	77.2% (10)	17.5% (26)	25.4% (5)	62.6% (36)
U.S. Average	61.2%	14.1%	13.4%	62.0%

Source: Governing: State & Local Sourcebook. Originally compiled from the Annual Survey of Government Finances, 2004-2005, U.S. Census Bureau. Accessed on June 3, 2008, from sourcebook.governing.com.

What is the Strategies for State Policies and Spending?

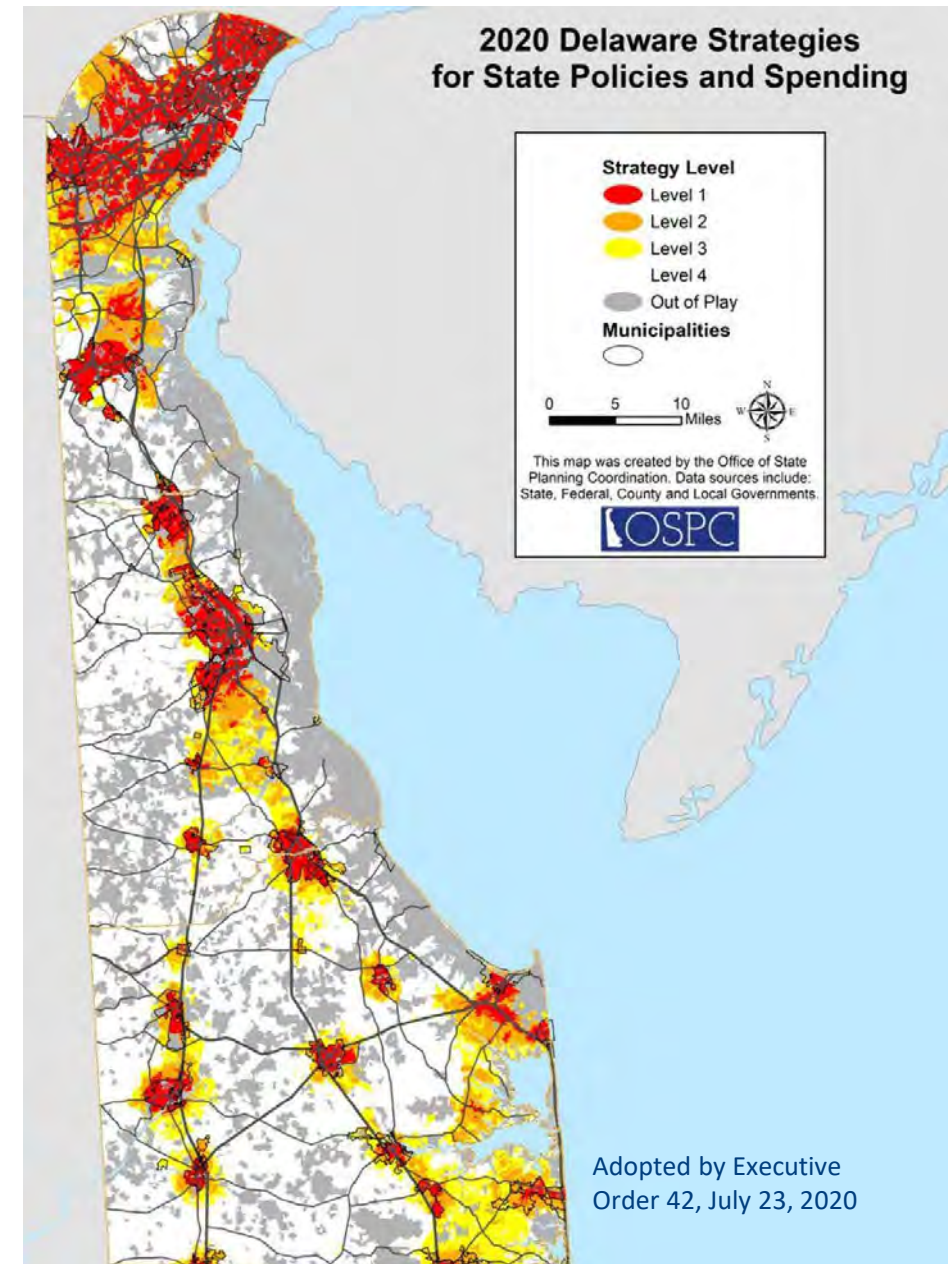
- **Required by Delaware Code*:**

... The Committee shall consider matters relating to the **orderly growth and development** of the State, including, but not limited to:

Preparing the Strategies for State Policies and Spending document and maps, which shall serve as the primary policy guide that summarizes the State's land use goals, policies and strategies and **directs State spending into investment levels that support the most efficient use of State resources...**

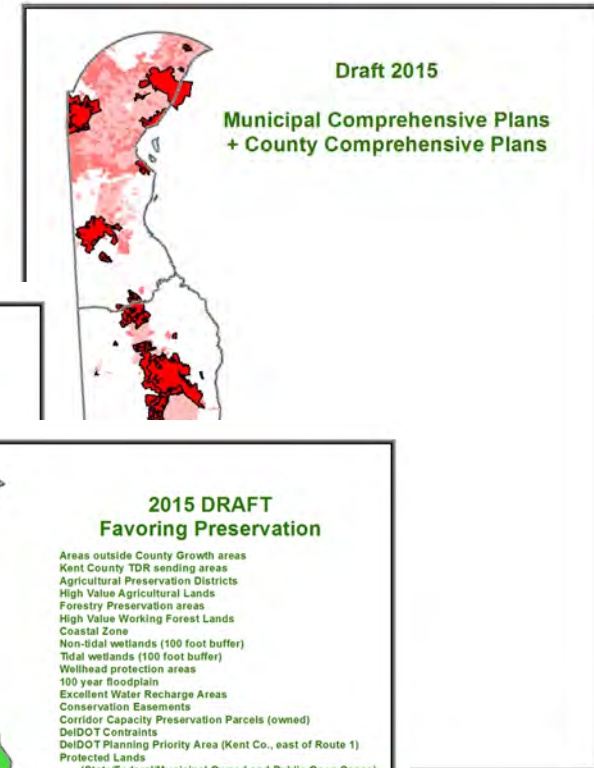
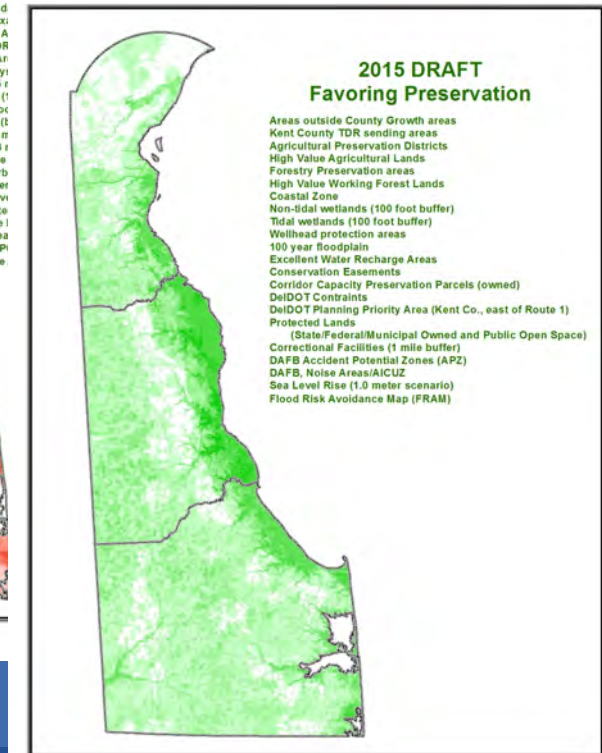
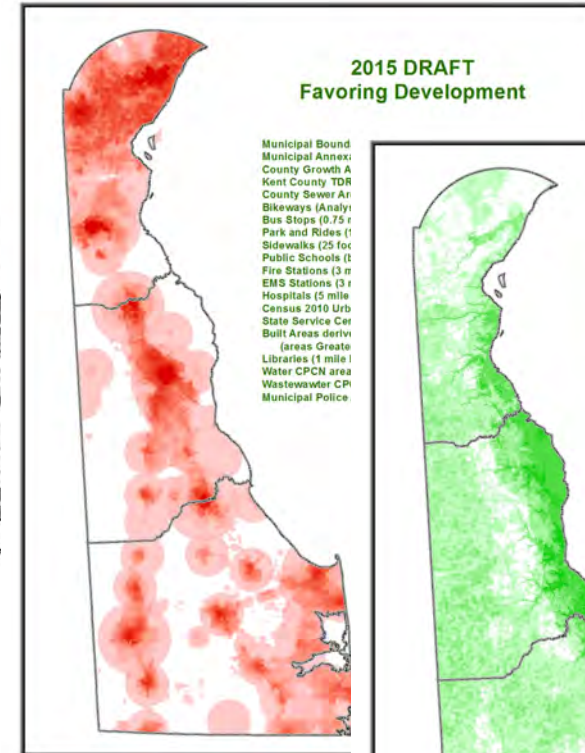
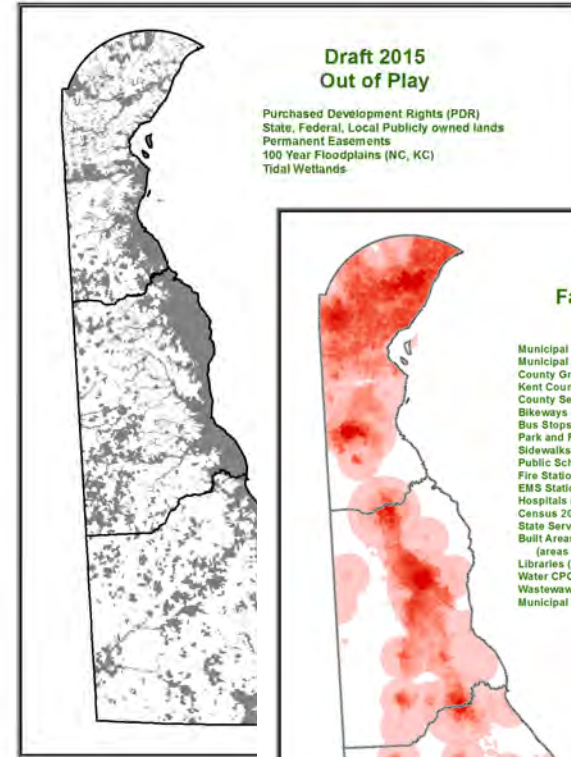
- **Policies and maps guide State investments in infrastructure and services**
- **Do not preempt local land use authority; localities make own land use decisions per Delaware law**
- **Must be considered in local comprehensive plans**
- **History: 1999 adopted; Updated in 2004, 2011, 2015 & 2020**

*Title 29, Chapter 91, Section 9101 (c) (5)

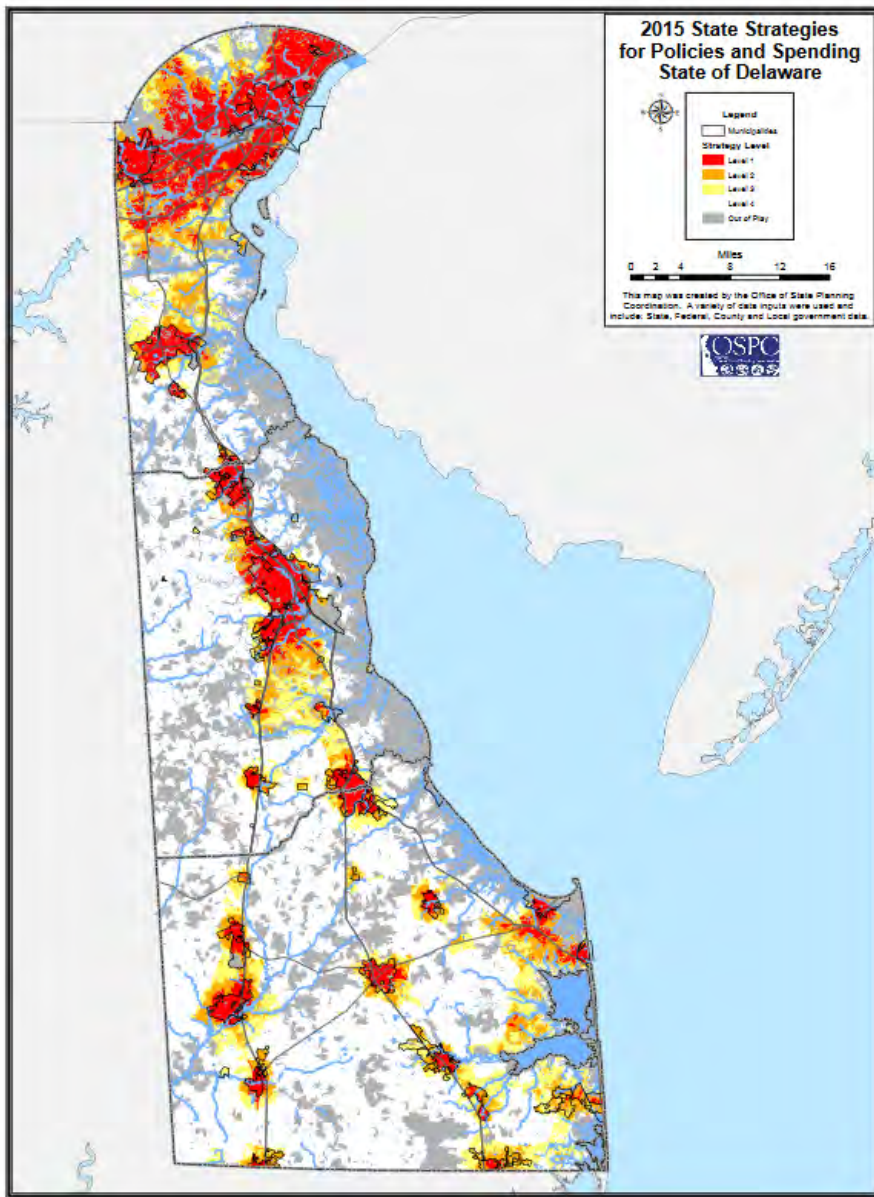


Data used to make maps include:

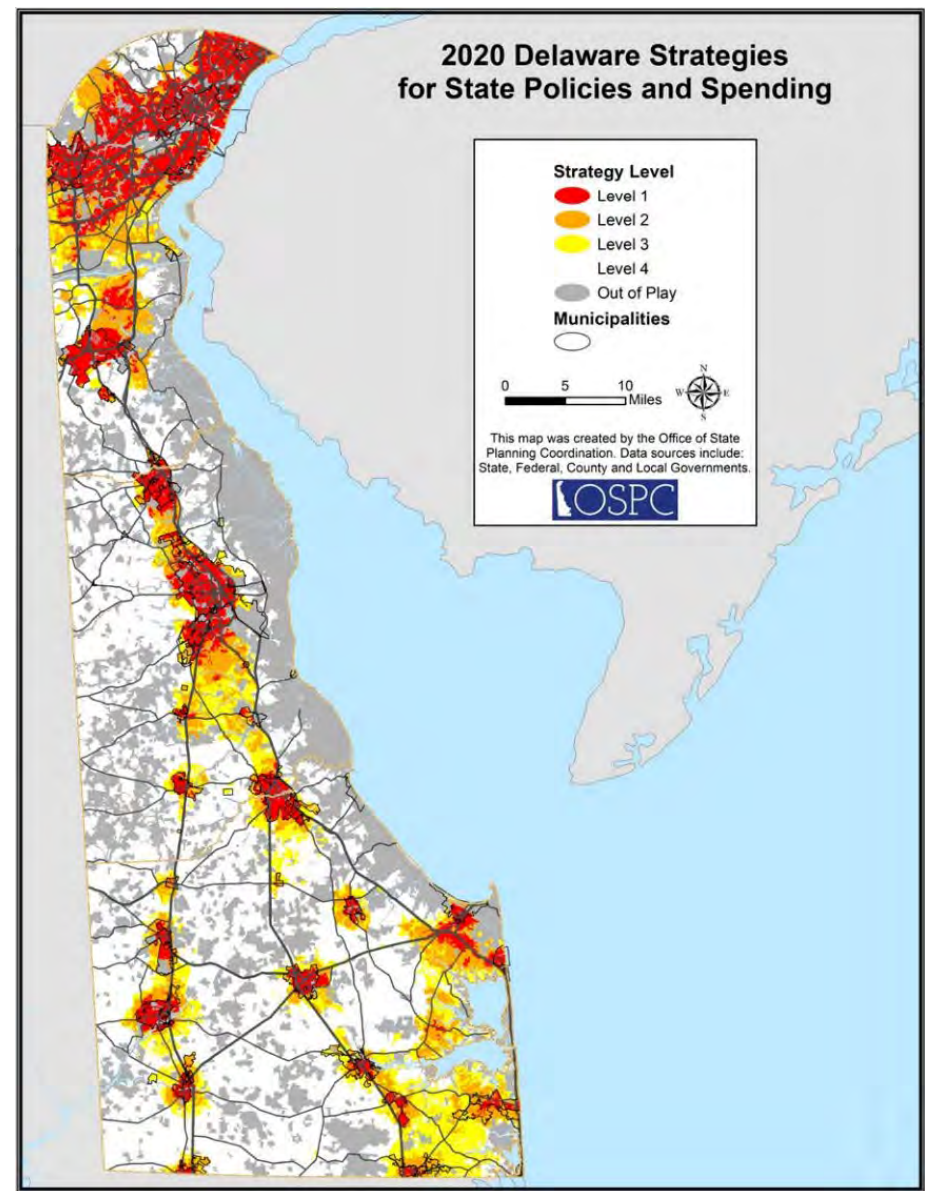
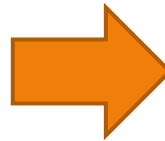
- School Sites
- Transit Routes
- Social Service Centers
- Police/Fire/EMS Facilities
- Corridor Capacity Preservation Areas
- Ag Preservation Districts
- Green Infrastructure
- Parklands
- Municipal and County certified comprehensive plans



Packets on table show the layers used to generate maps



2015 Strategies



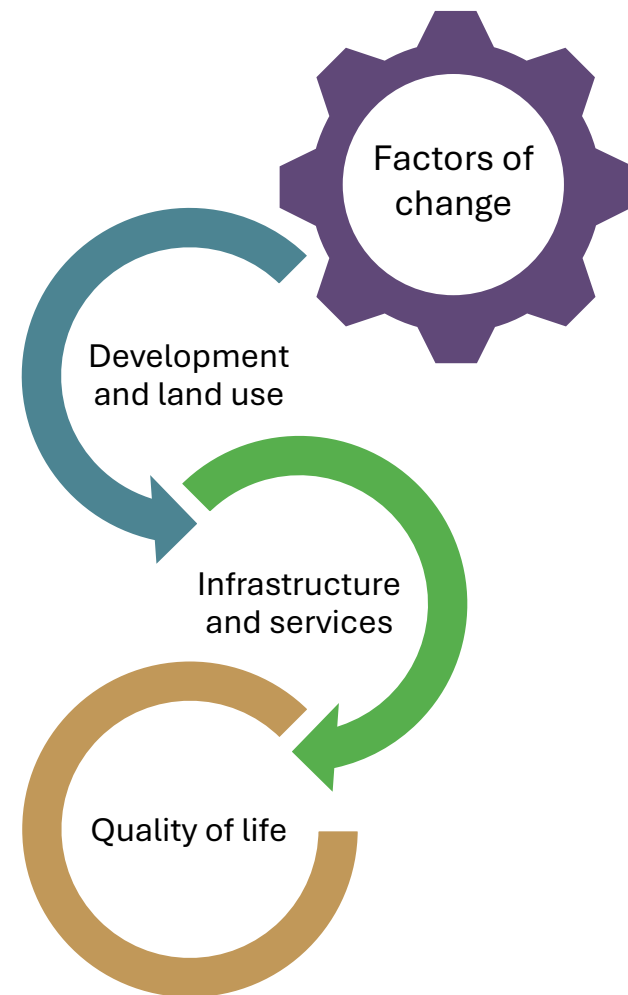
2020 Strategies



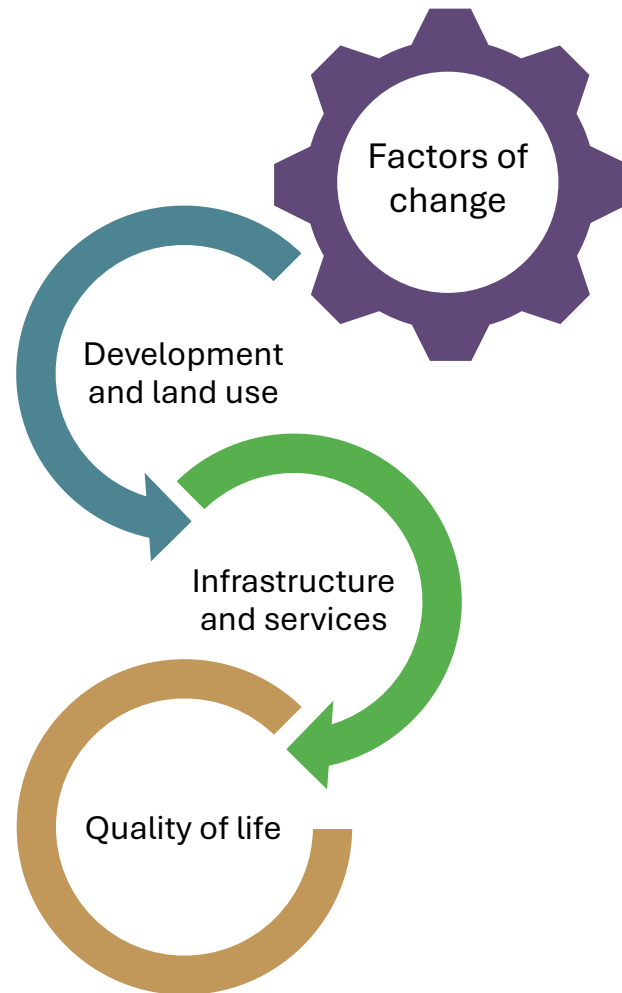
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II. Data-Backed Insights

External factors and their effects on Delaware communities



External Factors



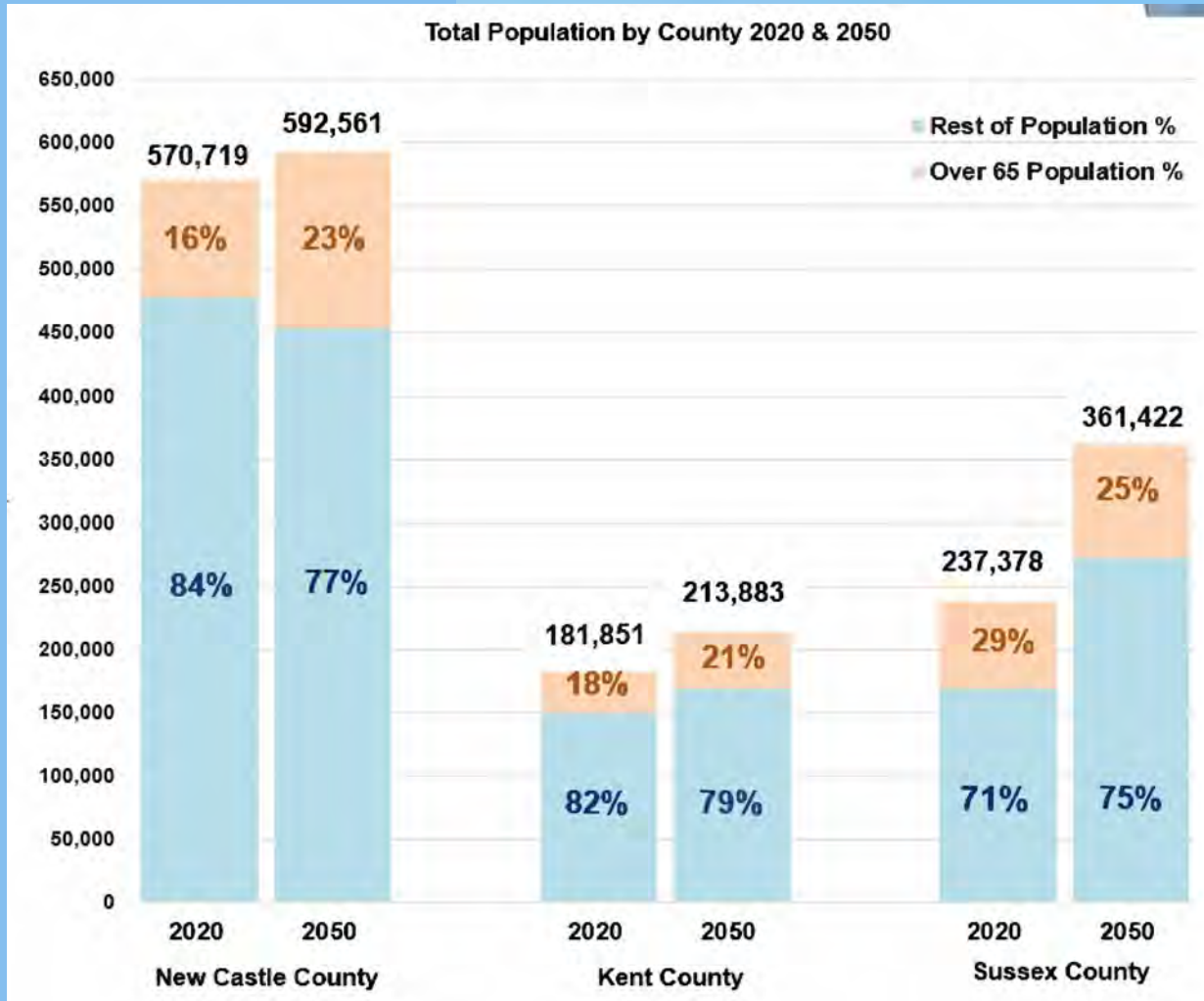
Factors Affecting Delaware



- **Real estate market demand:**
 - Lower taxes attracting influx of new residents from surrounding region
 - Especially retirees
 - Especially Sussex County
- **Technology changing work and shopping patterns:**
 - E-commerce spurring warehousing presence and logistics activity
 - Remote work changing commuting habits
- **Sea-level rise, climate change and flooding:**
 - Rising water levels on our coastal state caused by GHG emissions are causing more frequent / severe flooding, including sunny-day flooding
 - Sea levels will continue to rise and days with heavy precipitation expected to increase



What's Going on Here?



Relative to other states, locating in Delaware is appealing:

- low taxes
- access to services, amenities, etc.



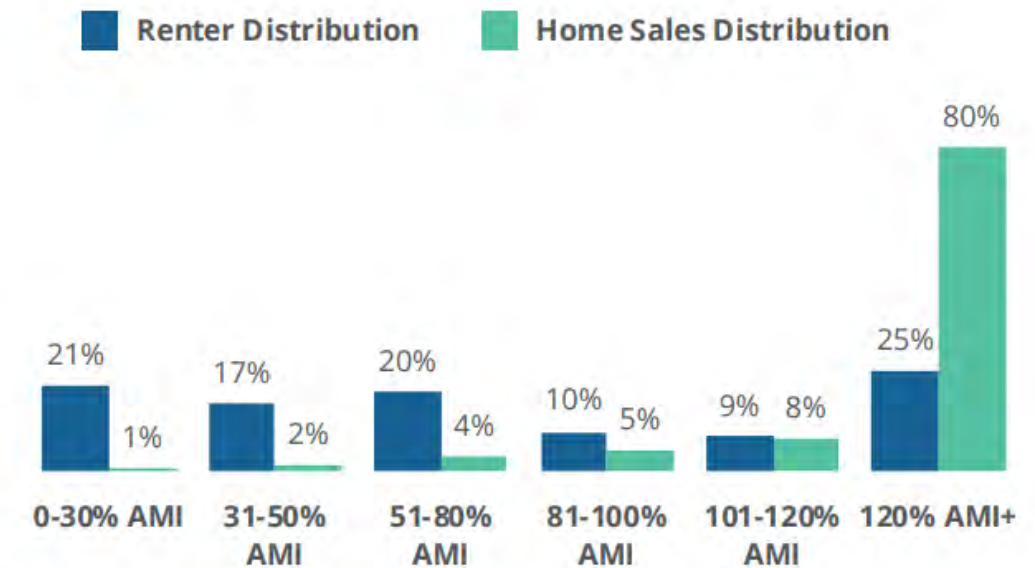
Data Insight: Demographics are Changing

- People relocating to Delaware –
 - About 27,000 net domestic migration to Delaware (2020-2022)
- Increasing share of population is older
- Demand for high-price point housing product

What are the implications?

- Mismatch in housing being provided relative to local need
- Increasingly unbalanced, feedback loop effect:
 - Housing
 - Development / land consumption
 - Essential services and infrastructure

Distribution of Home Sale Prices and Renters Who Can Afford to Buy Homes by AMI Range, 2022



Note: Assumes a 30-year mortgage at a rate of 6.5% with a 20% down payment and 25% of monthly payment is used for property taxes, utilities, and insurance.

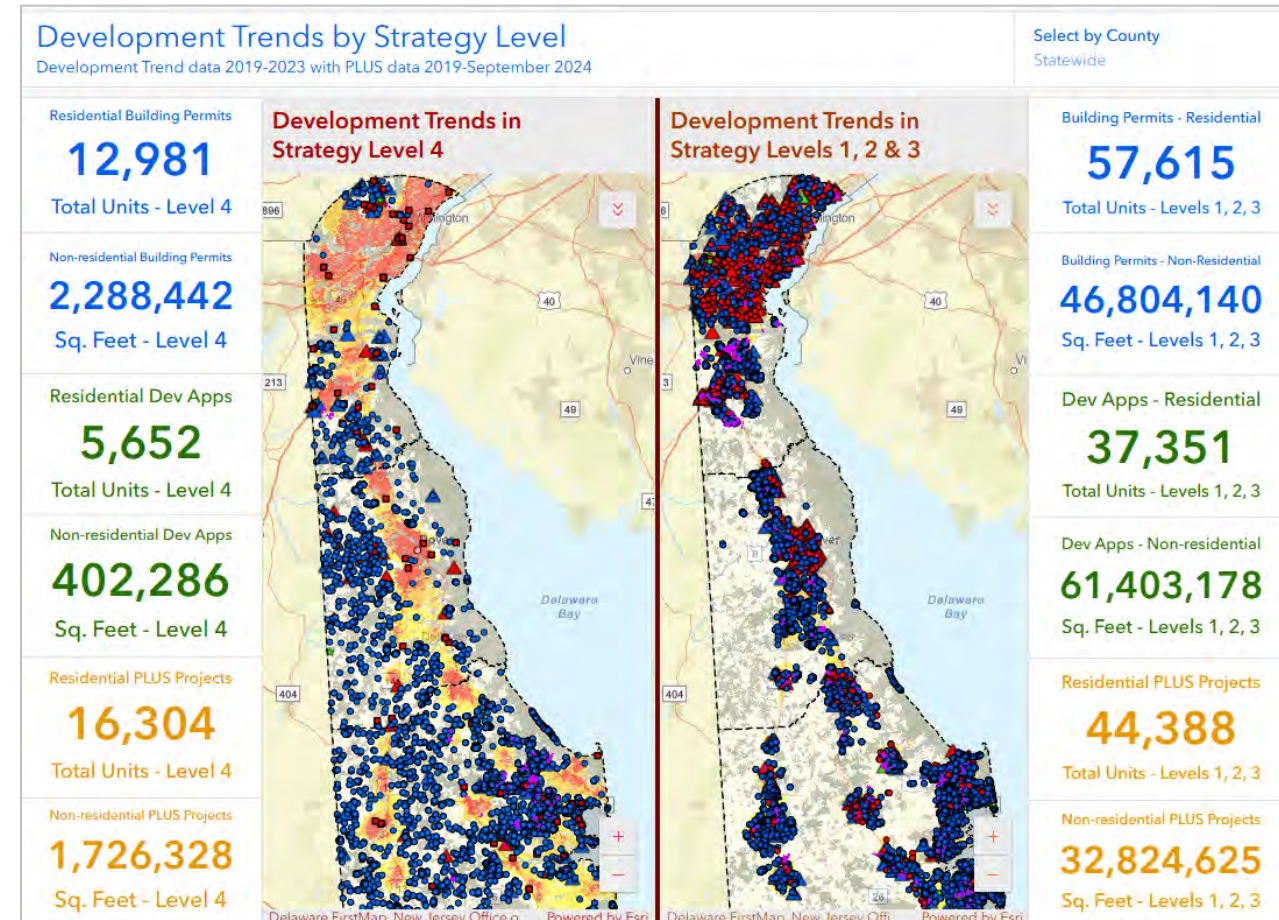
Source: Root Policy Research, 2021 ACS 5 year estimates, and HMDA.

Data Insight: Development and Land Use

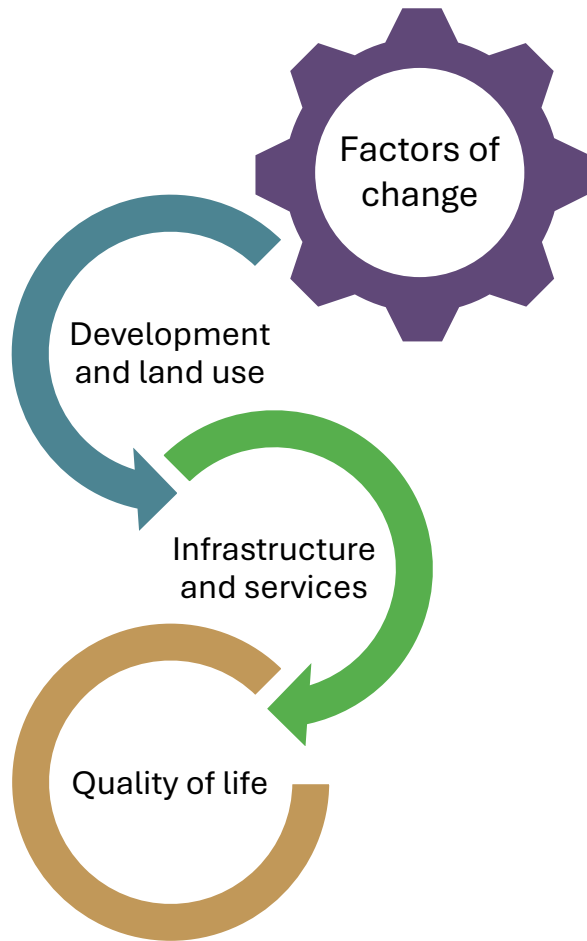
- Sprawl
- Uniform housing
- Warehousing/logistics

What are the implications?

- Inefficiencies and rising costs to provide the infrastructure
- Associated impacts:
 - Increasing motor vehicle traffic and vehicle miles traveled
 - Affordable housing (living) challenges
 - Environmental degradation (forest, ecosystem, water, etc.)
 - Risk (in light of climate change)
 - “Crowding out” of industry, farming



Adapting to Factors of Change



State can't control the external factors, but:

- Collaborates with local authorities on development and land use
 - Monitoring change (eyes on horizon)
 - Planning support (comprehensive plans)
 - PLUS process (provide support and insights on project basis)
- Monitors, plans, budgets/programs, provides infrastructure and services

...and inasmuch works to support communities across the state toward high quality of life





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III. Further Into the Data

A closer look at trends, implications, and finding ways to adapt...

Transportation

Environment

Economy

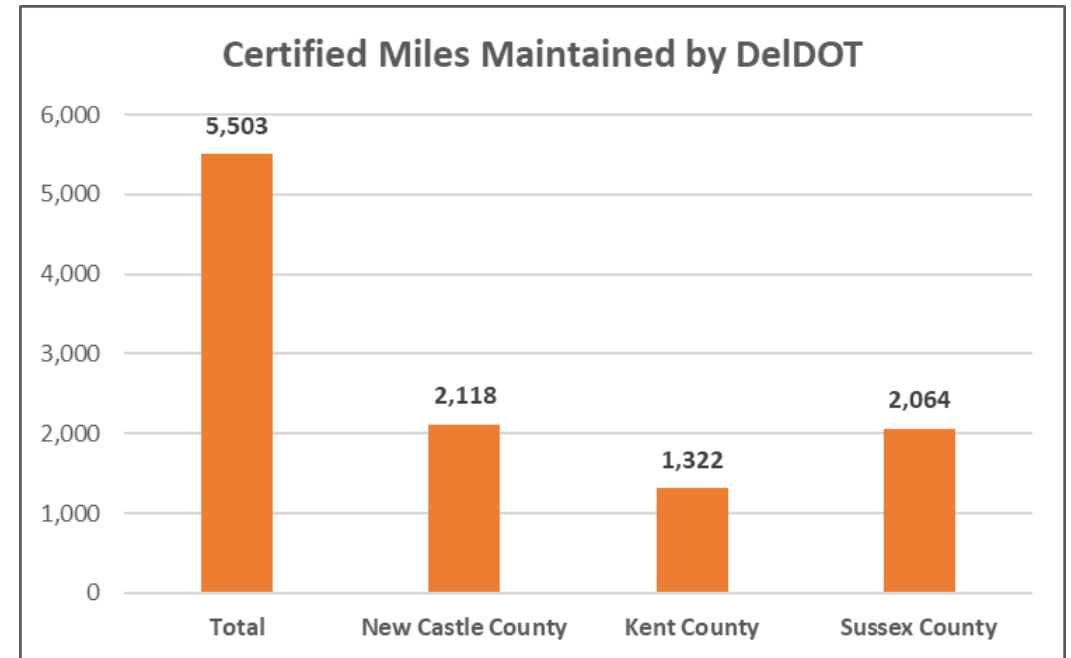
Housing

Transportation

Delaware DOT manages 89%
(national average of state-maintained roads: 20%)

Trends:

- Costs for infrastructure rising
- Funding forecasts trending down
- Frequently flooded roadways - 250 road segments were prioritized based on flood risk and several other factors (AADT, evacuation routes, essential facilities, etc.)
- Transit is evolving



*HPMS certified miles, or Certified Public Mileage (CPM), are the total length of a state's public roads as certified by the state's governor.



Market reviews (2010-2030)

Transportation

Transportation Improvement Districts (TID) – a proactive, collaborative approach to planning / funding transportation infrastructure.

14 TIDs statewide

Forecasted development in TIDs:

- 74k residential units
(over two times Wilmington or 100 times Cheswold)
- 40 million non-residential square feet
(nearly 40 Christiana Malls or 100 warehouses)

Over \$1 Billion in projects identified

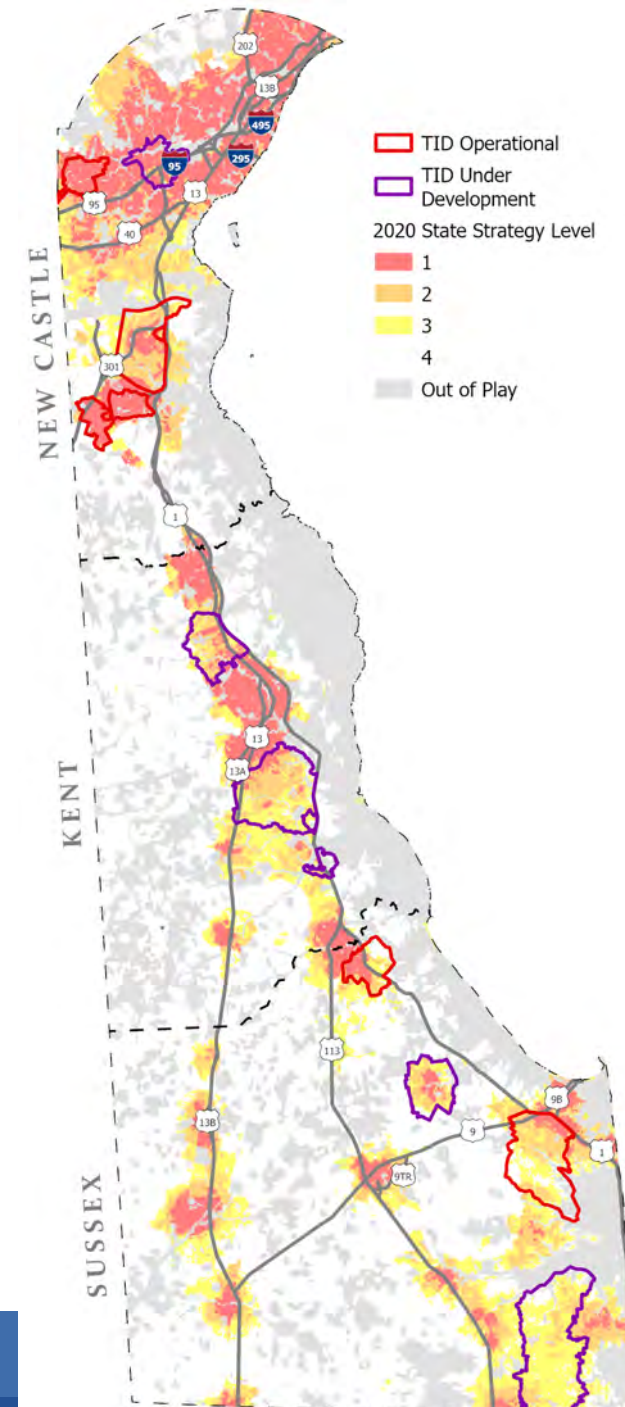
(includes 2 of 7 TIDs currently under development)

TID Operational

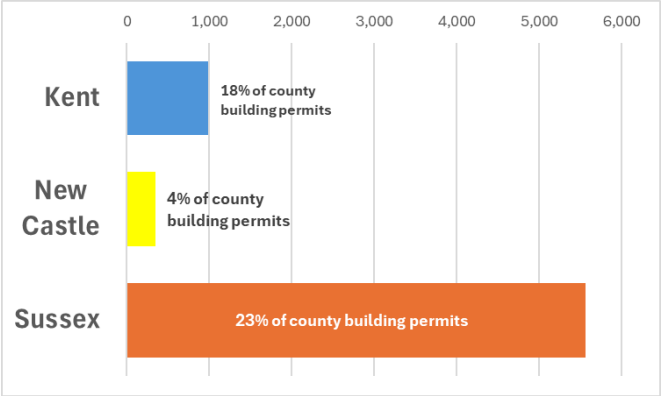
- Newark
- Southern New Castle County
- Hyetts Corner
- Westtown
- Eastown
- SE Milford
- Henlopen

TID Under Development

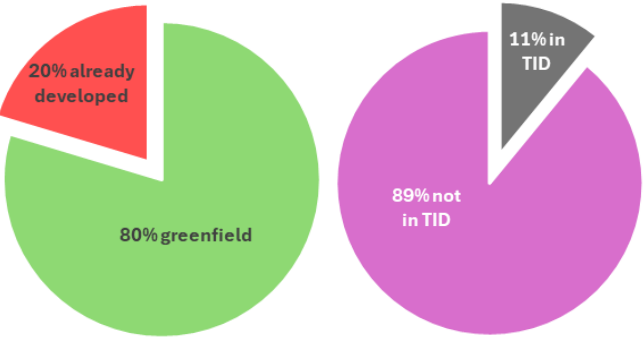
- Little Heaven
- South Frederica
- Cheswold Area
- Magnolia
- Milton
- Roxana Area
- Churchman's Crossing



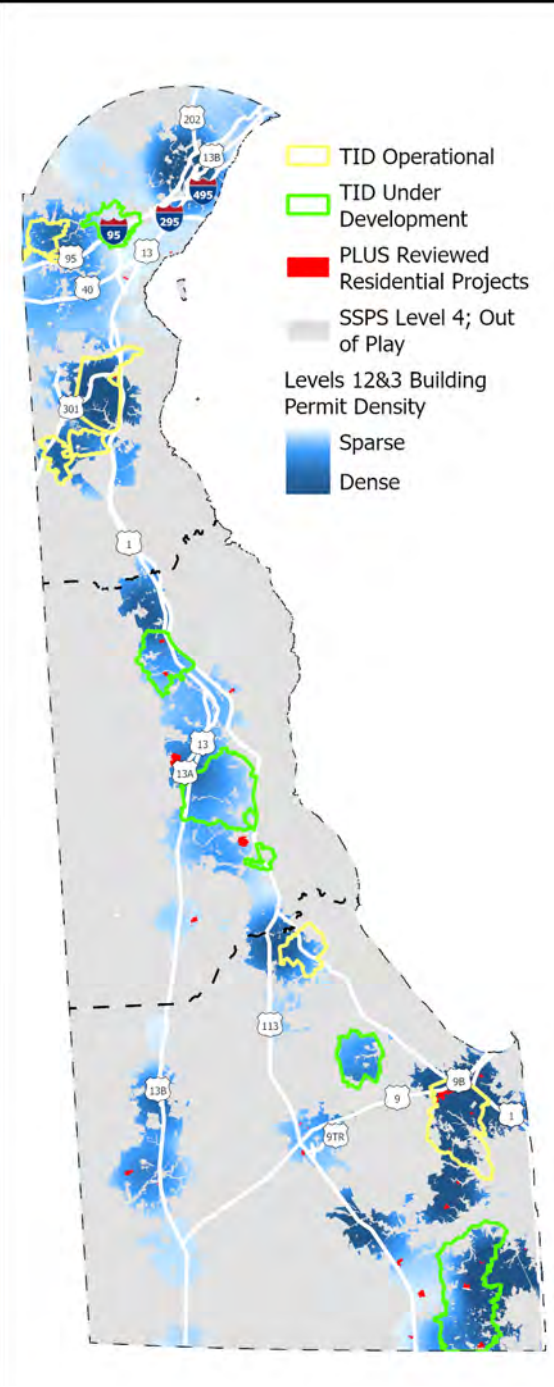
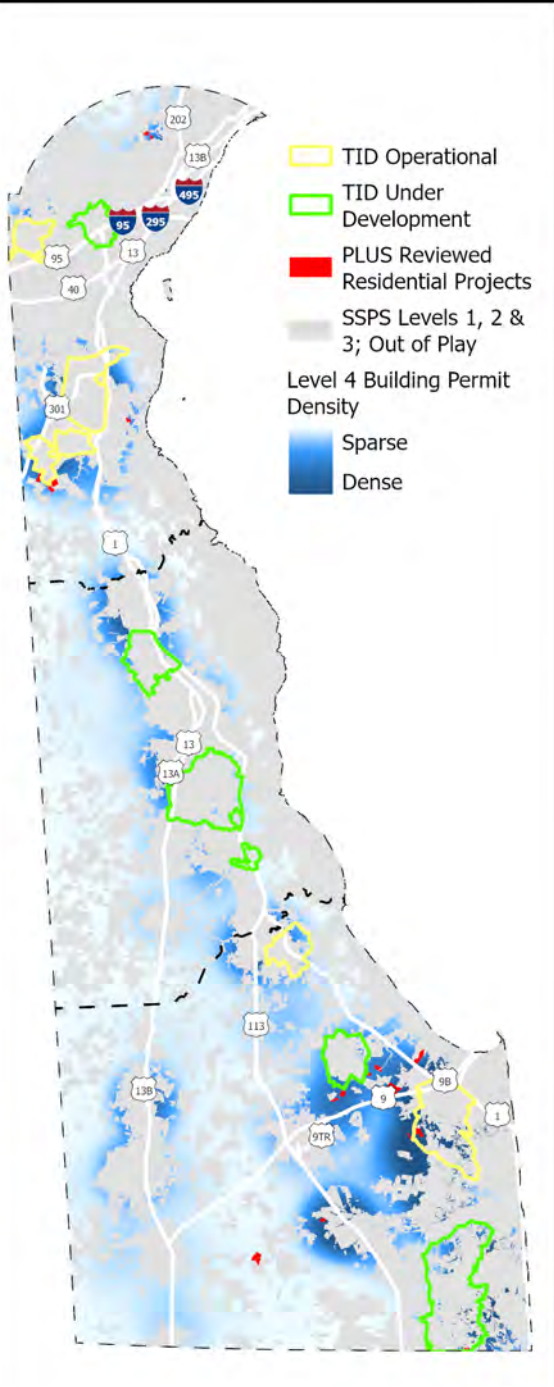
Development Trends in
Strategy Level 4



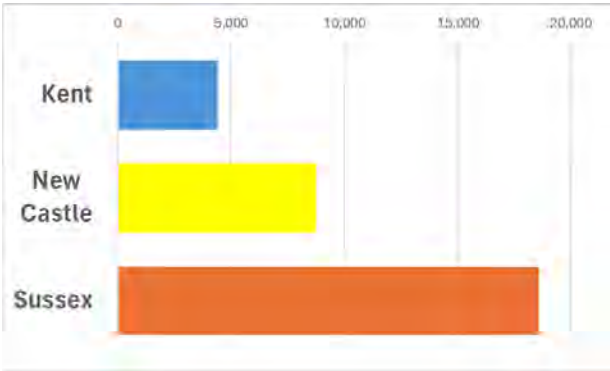
Building Permits Level 4:
6,886 residential units (18%)
765,659 non-residential sqft (3%)



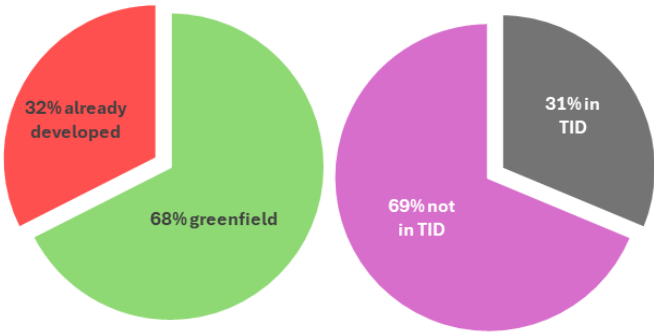
Reviewed PLUS Dev't Level 4:
8,685 residential units (46%)
814,100 non-residential sqft (13%)



Development Trends in
Strategy Levels 1, 2 and 3



Building Permits Level 1, 2 & 3:
31,751 residential units (82%)
25.5M non-residential sqft (97%)

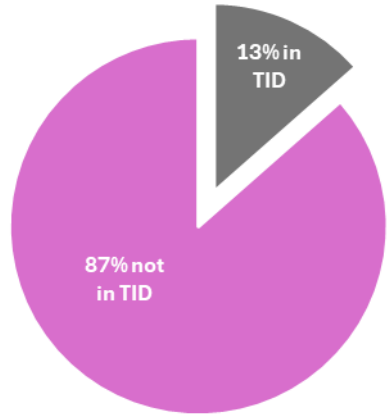
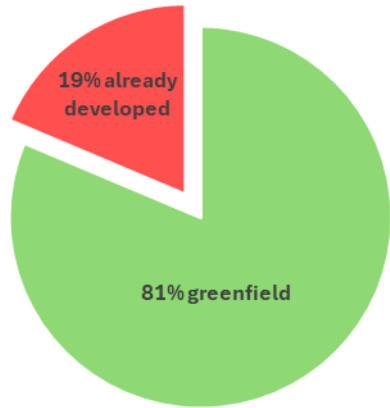


Reviewed PLUS Dev't Level 1, 2 & 3:
10,353 residential units (54%)
5.4M non-residential sqft (87%)

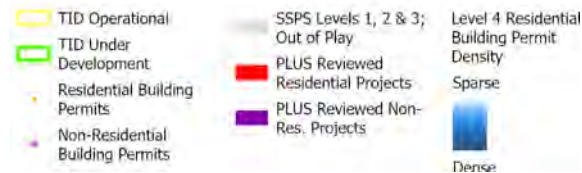
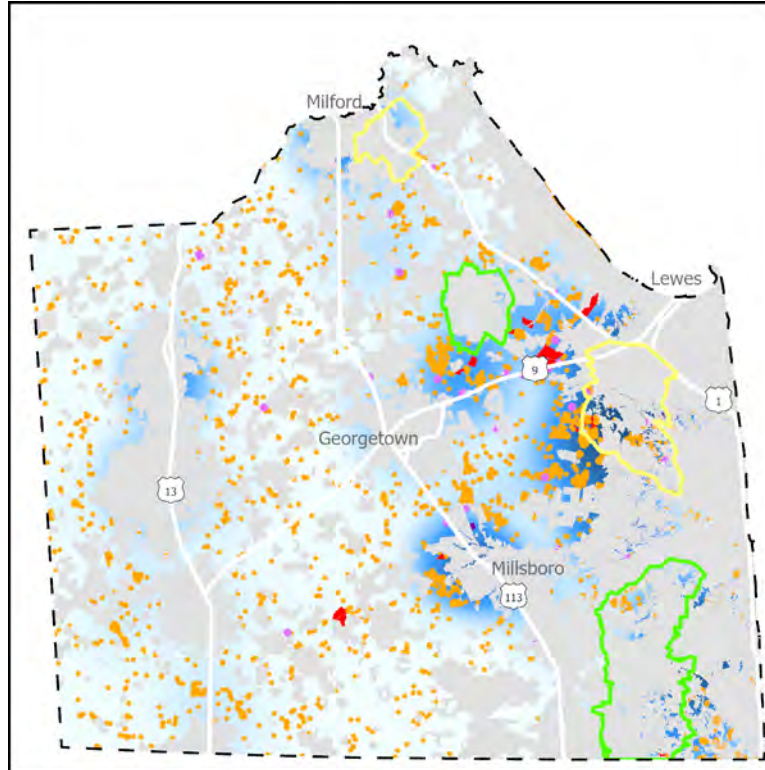
*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

Development Trends in Strategy Level 4

Building Permits Level 4:
5,558 res. units (23%)
547,591 non-res. sqft
(11%)



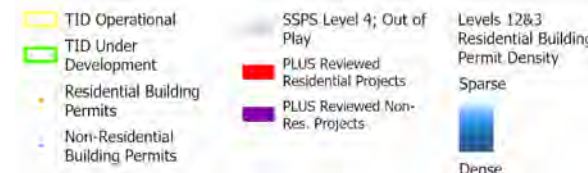
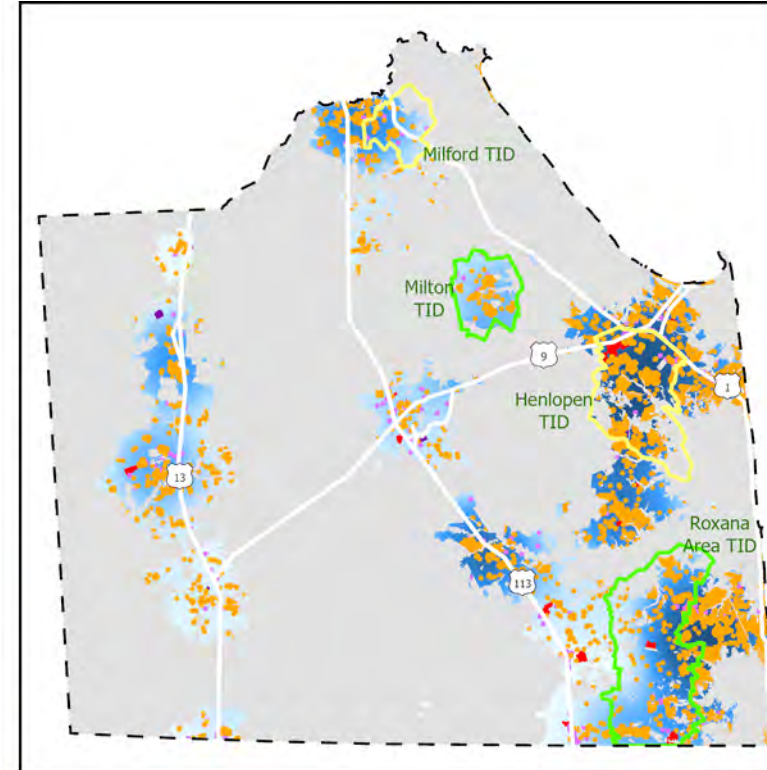
Reviewed PLUS Dev't Level 4:
7,410 residential units (58%)
845,145 non-residential sqft (20%)



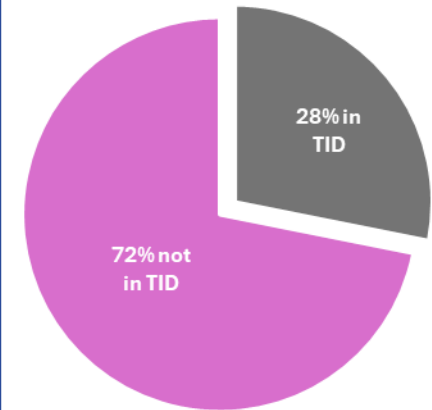
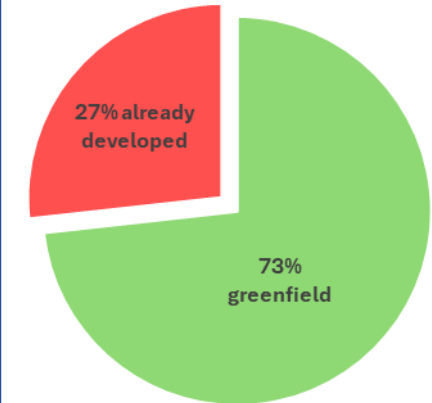
SUSSEX COUNTY

Development Trends in Strategy Levels 1, 2 and 3

Reviewed PLUS Dev't Level 1, 2 & 3:
5,394 residential units (42%)
3.5M non-residential sqft (80%)



Building Permits
Level 1, 2 & 3:
18,585 res. units (77%)
4.5M non-res. sqft (89%)



*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

Transportation & Land Use



SUSSEX COUNTY
DELAWARE

Home Online Payment Question/Comment? Contact Us



GovernmentCitizensVisitorsBusinessServices

Home

Online Map Search

Road Naming

FAQ

Post a 911 Address

Addressing Standards

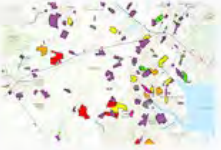
Sussex County Mapping Applications



Planning and Zoning
Land Use Applications
(select *Docket Search* tab)



Sussex County
Map Viewer



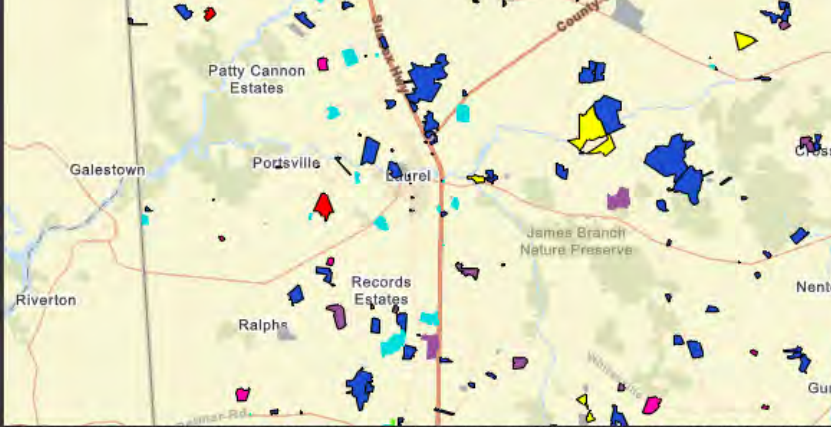
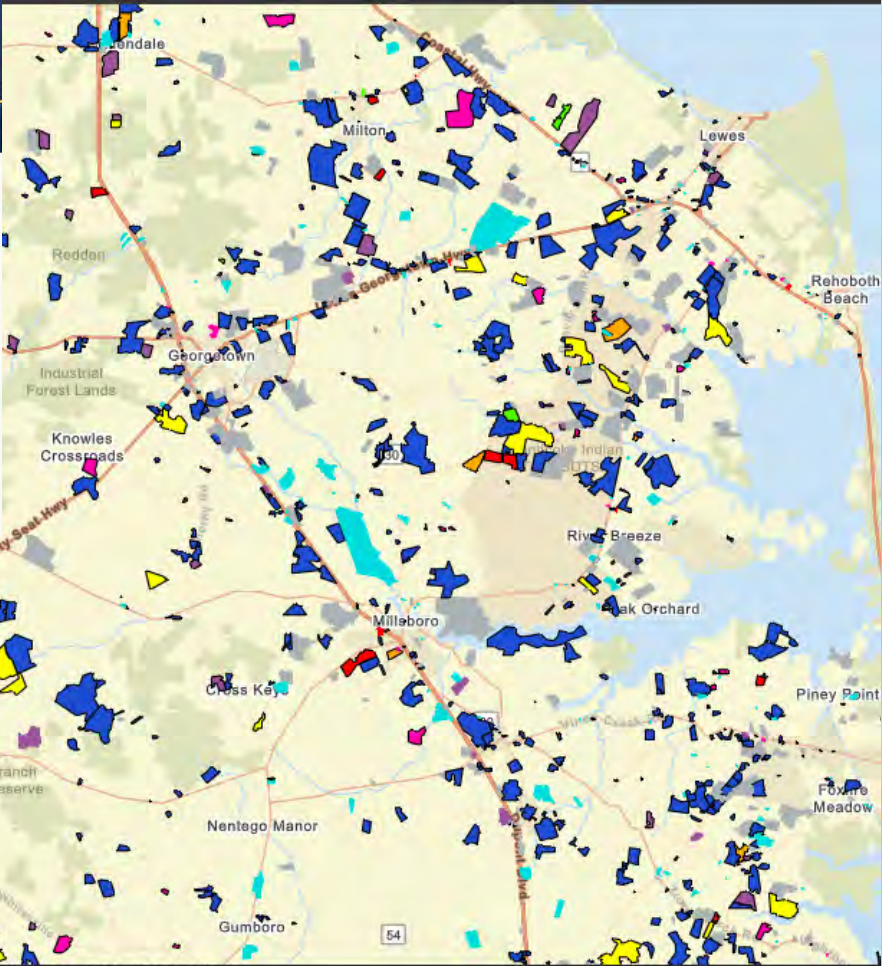
DeIDOT Agreement
Dashboard

202411954

Issued: December 1, 2024
Desc. 1: 2 ST DW 64X58, ATT GAR 28X24, PORCH 10X21, 10X24,
Desc. 2: DECK 10X21, UNF 11X26
DWELLING
Permit Status: A
Application Status: O

202416014

Issued: December 1, 2024
Desc. 1: WALDEN BUS STOP
Desc. 2: 9X12 BUS STOP
COM
Permit Status: A
Application Status: O



Delaware FirstMap, VGIN, Esri, TomTom, Garmin, SafeGraph, METI/NAASA, USGS, EPA, NPS, USDA, USFWS

Legend

Areas w/Units
Areas w/Units
Area w/Units

Developer Agreements
Custom

- Subdivision Over Allocated
- Mixed Over Allocated
- Commercial Over Allocated
- Subdivision 100% Allocated
- Mixed 100% Allocated
- Commercial 100% Allocated
- Subdivision Warning 75-99%
- Mixed Warning 75-99%
- Commercial Warning 75-99%
- Subdivision Caution 25-74%
- Mixed Caution 25-74%
- Commercial Caution 25-74%
- Subdivision Good
- Mixed Good
- Commercial Good
- Subdivision 0%
- Mixed 0%
- Commercial 0%
- Planning
- PTA
- Closed

Sussex County / DeIDOT Agreement Dashboard: <https://sussexcountyde.gov/sussex-county-mapping-applications>

Transportation

		Dwelling Units			
Transportation Improvement District (TID)		Forecast Year	SUPPLY	DEMAND	
NEW CASTLE		2040	20,697	5,667	
KENT		2045	16,206	14,851	
SUSSEX	SE Milford	2045	8,864	39,633	33,678
	Henlopen	2045	13,000		
	Milton	2045	4,972		
	Roxana Area	2045	12,797		
TOTAL			76,536	54,196	

Total Land Area

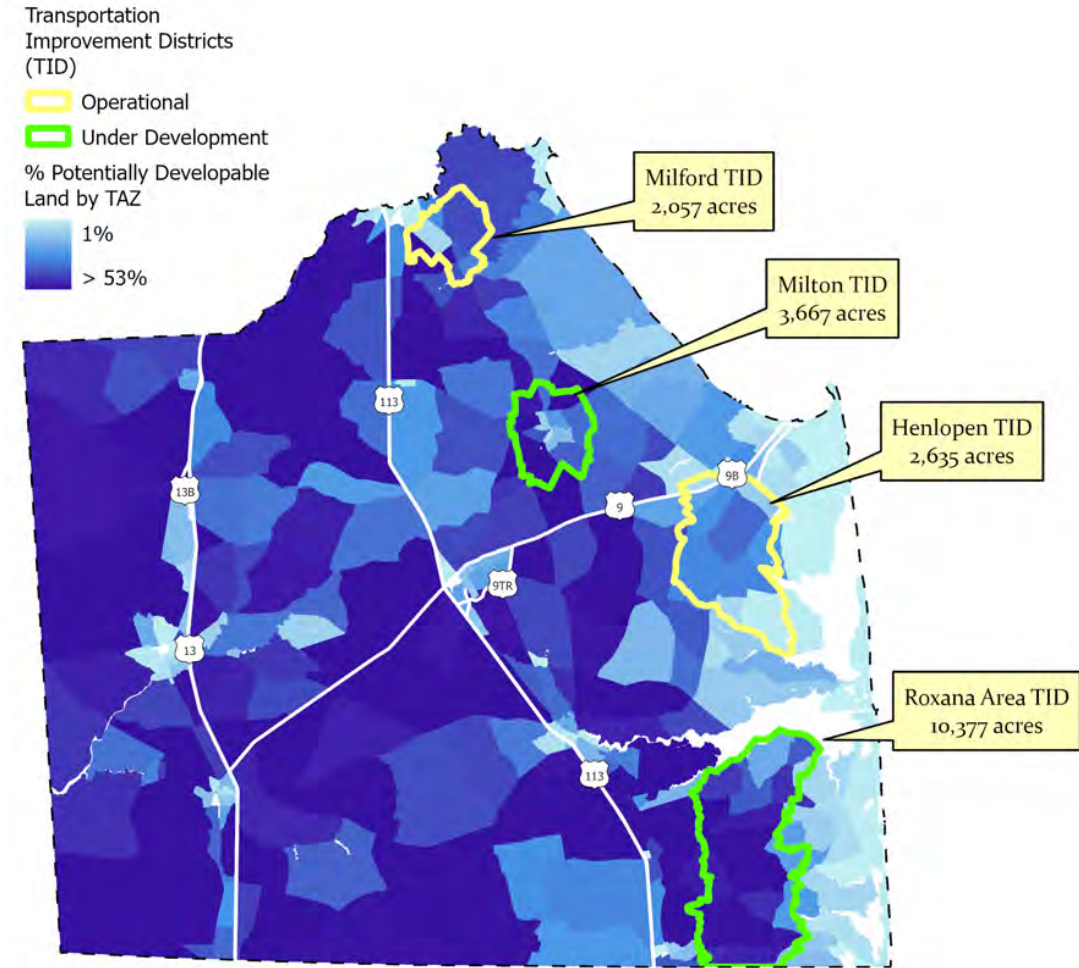
—

SSPS “out of play”
 2022 LULC residential / commercial / industrial / institutional
 Wetlands
 Impervious surface (NCC)
 Manual QA/QC (i.e., remove subdivided but not yet built lots)

=

Developable Land Area

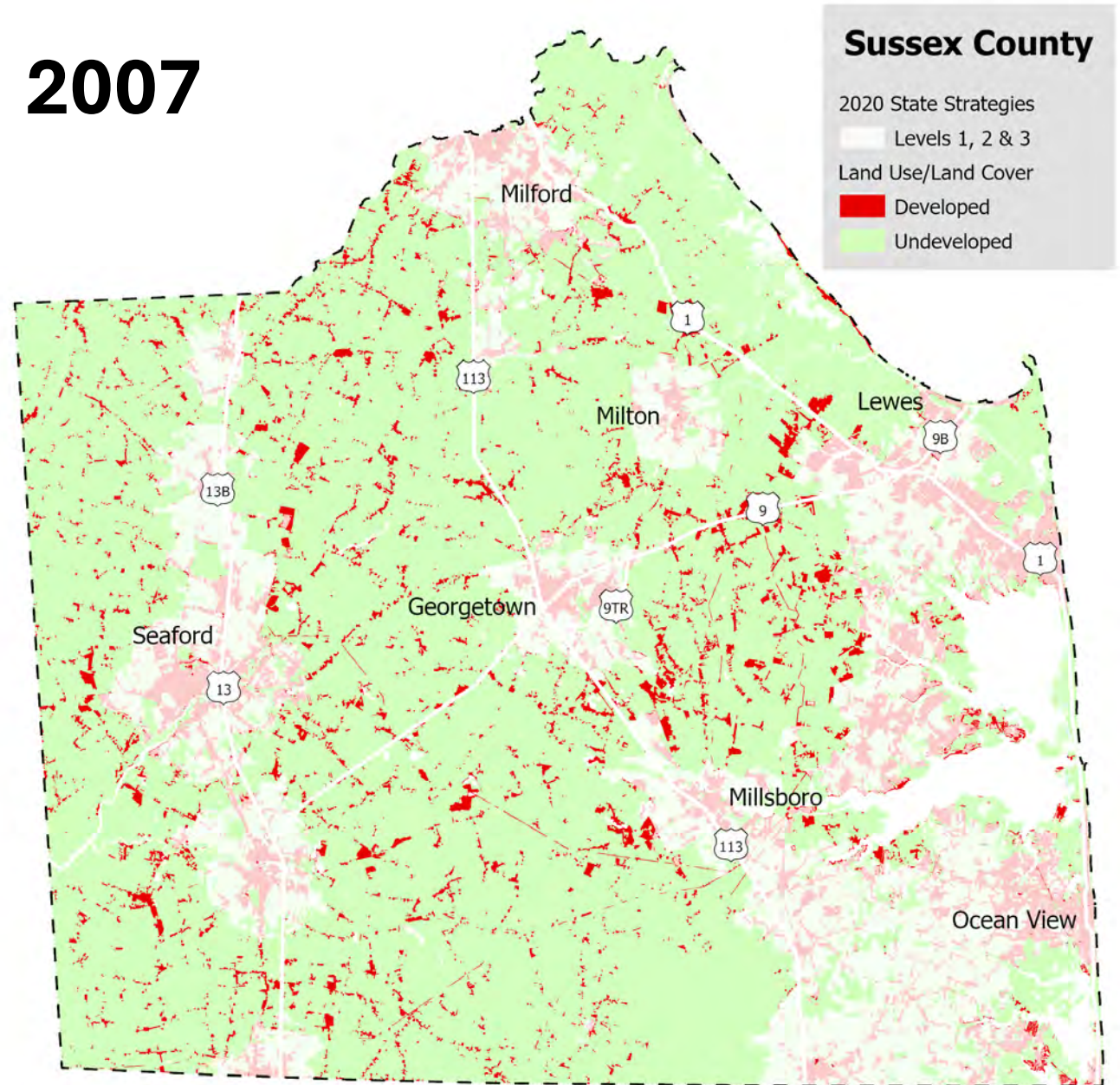
Percent of land developable (estimated by TAZ)



* labels show acres of potentially developable land in Levels 1, 2 and 3 in each TID

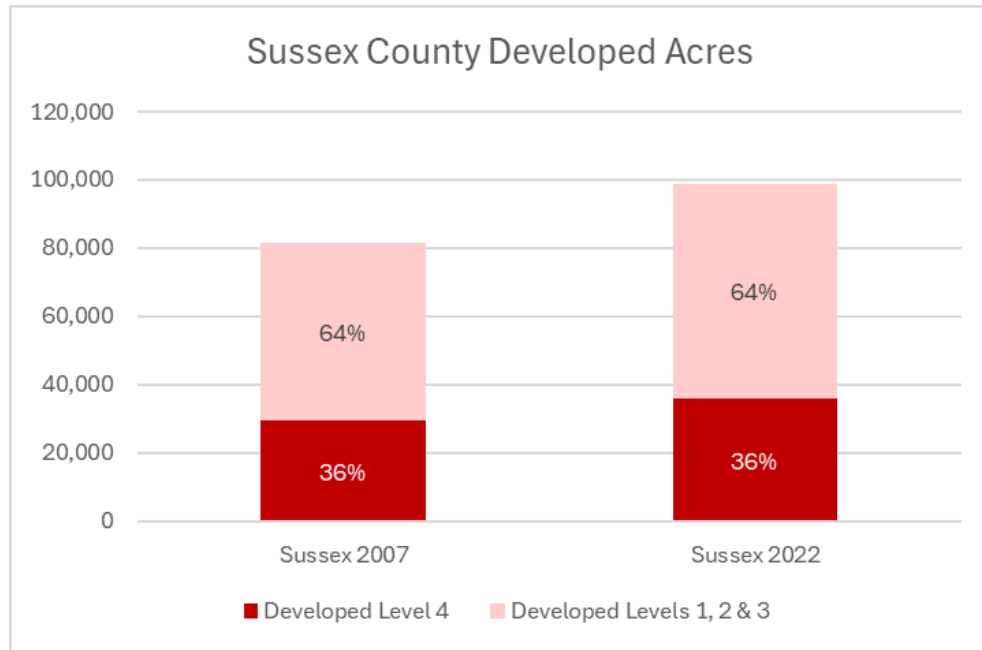
Developed Land

2007

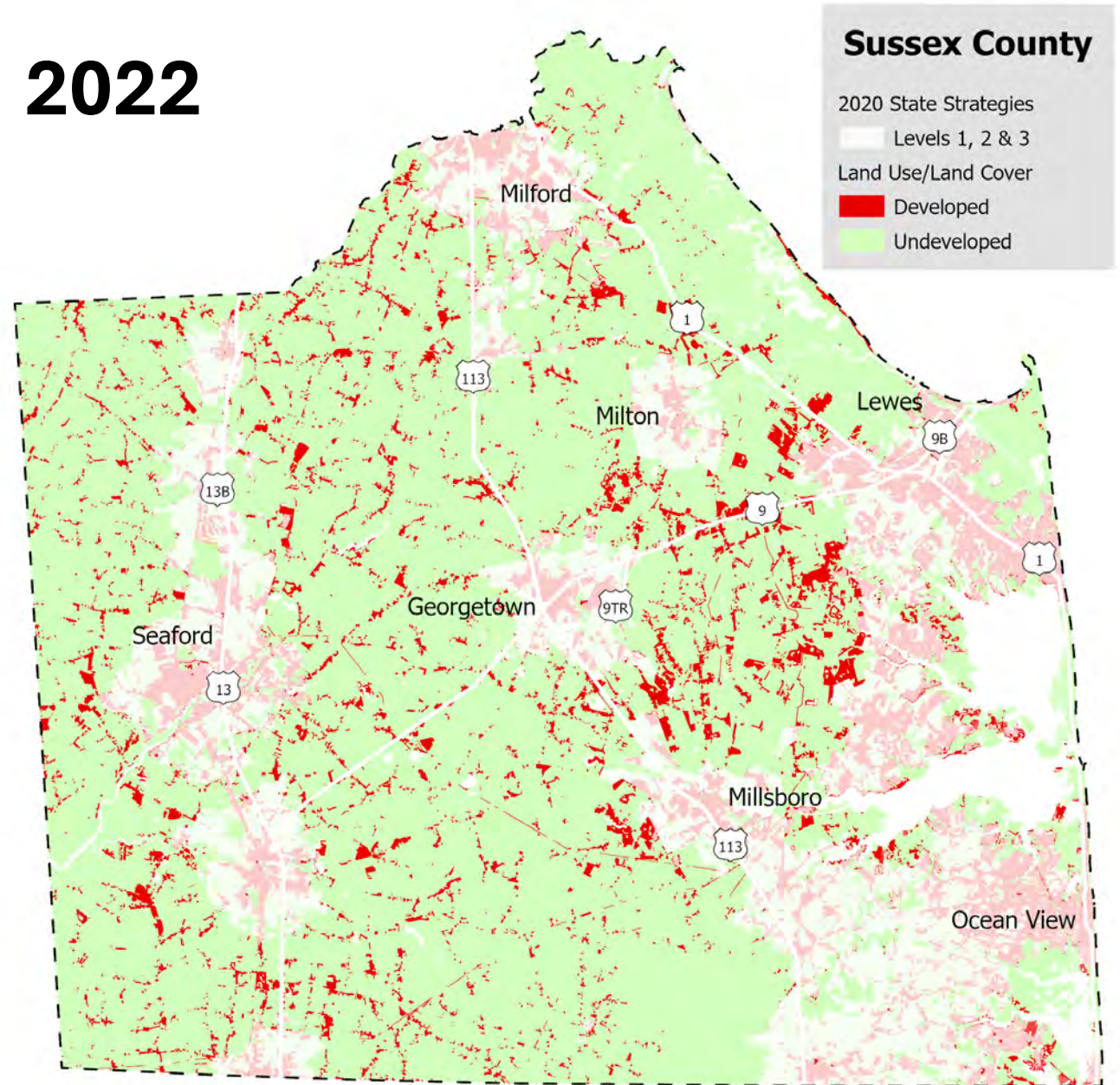


Developed Land

- Between 2007 and 2022, about 17,000 acres were developed in Sussex County
- About 6,500 acres of that occurred in Level 4 areas

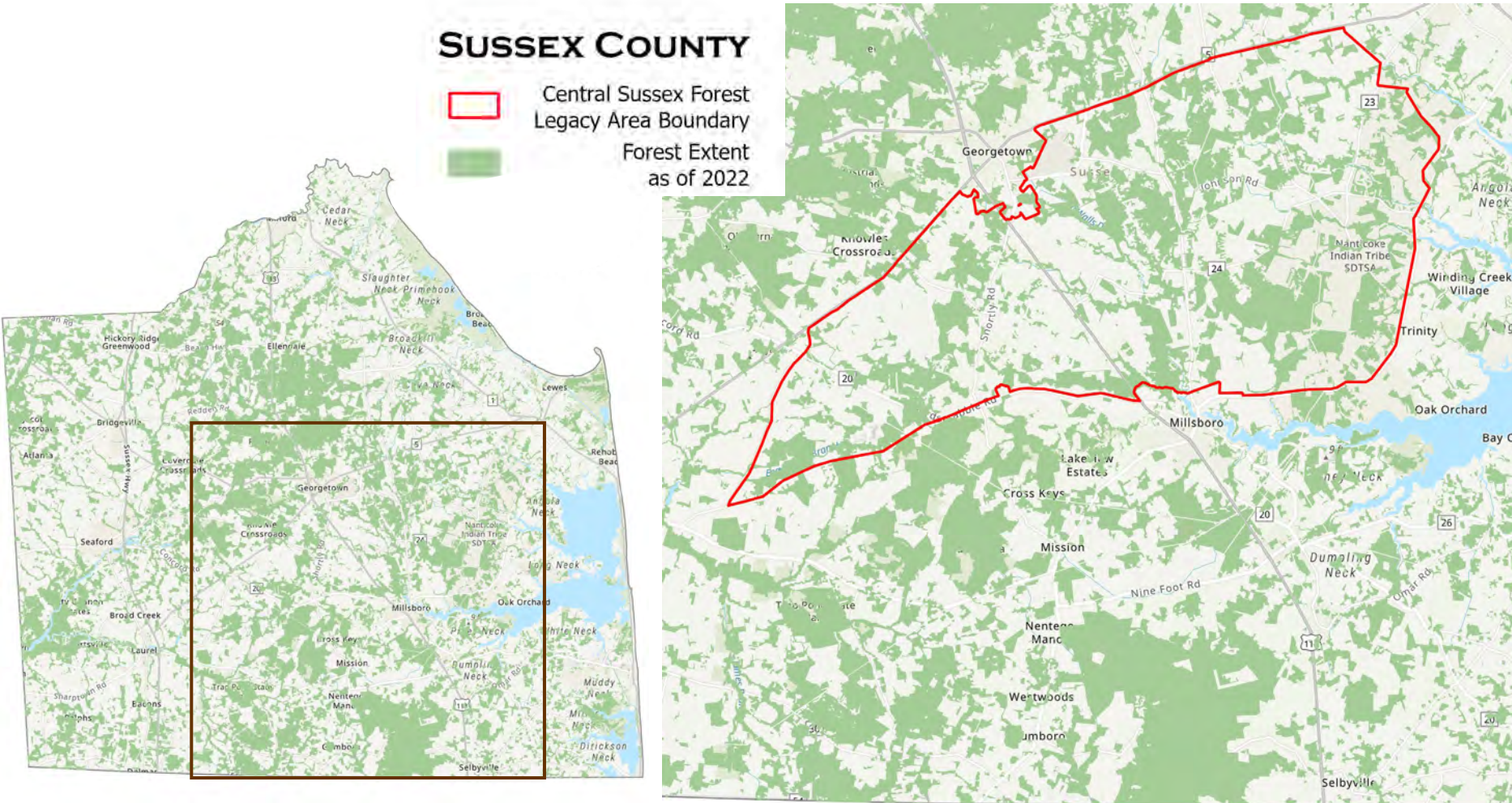


2022



Environment – Land / Resources at Risk

Delaware Statewide Forest Strategy

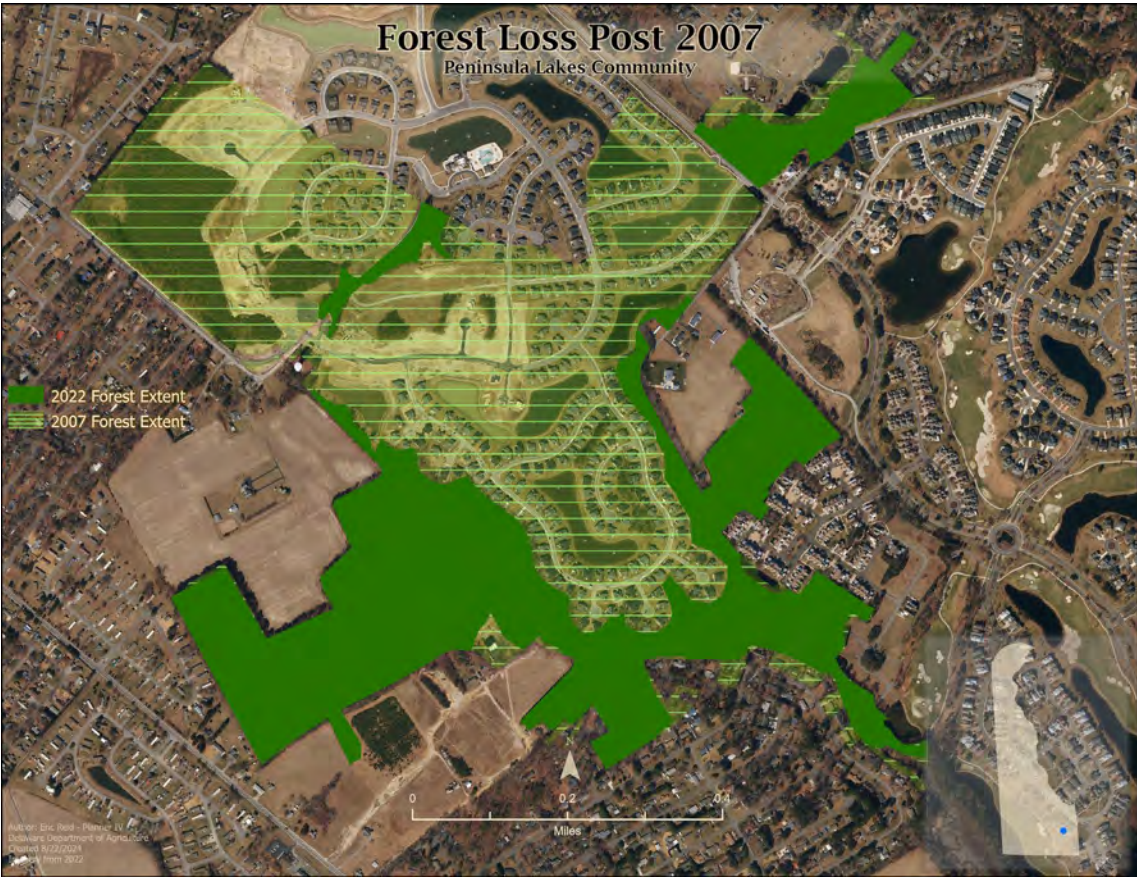
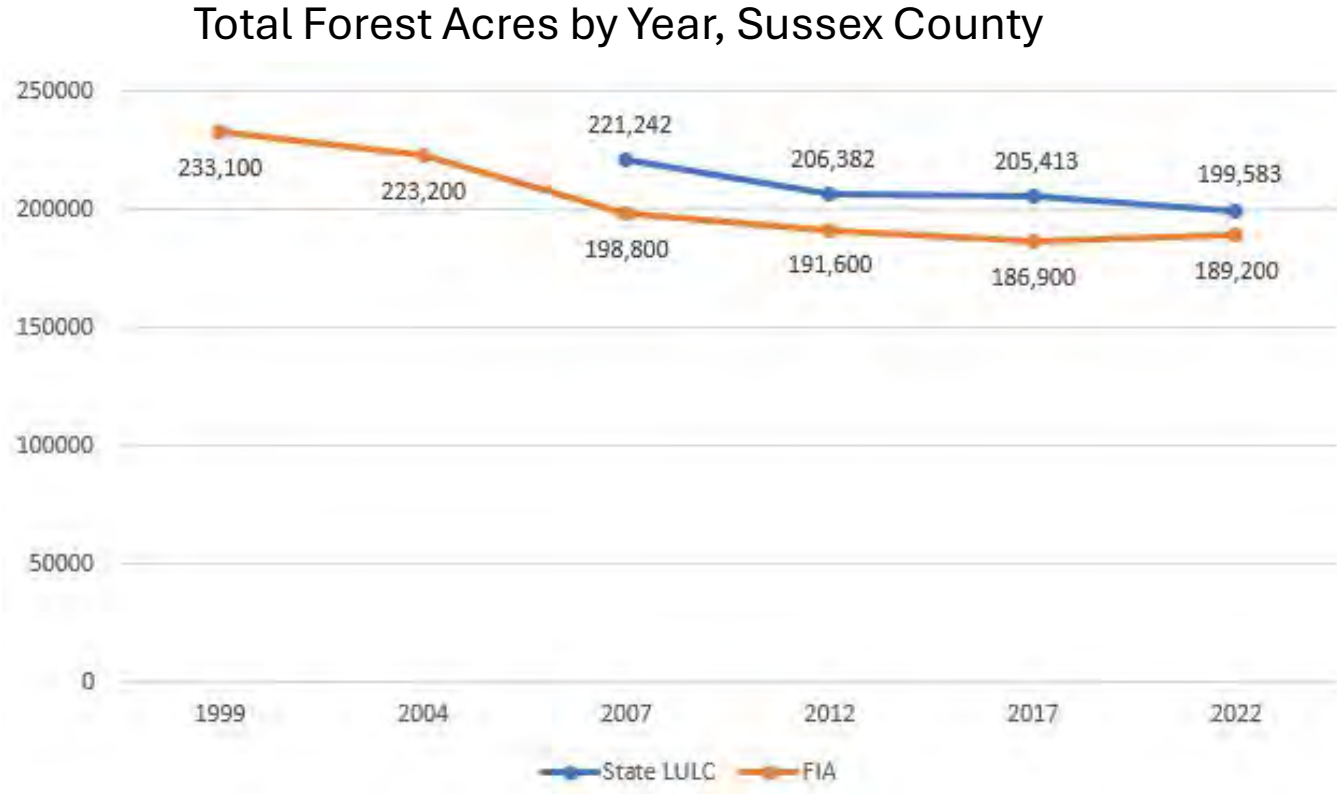


First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands

Environment – Land / Resources at Risk

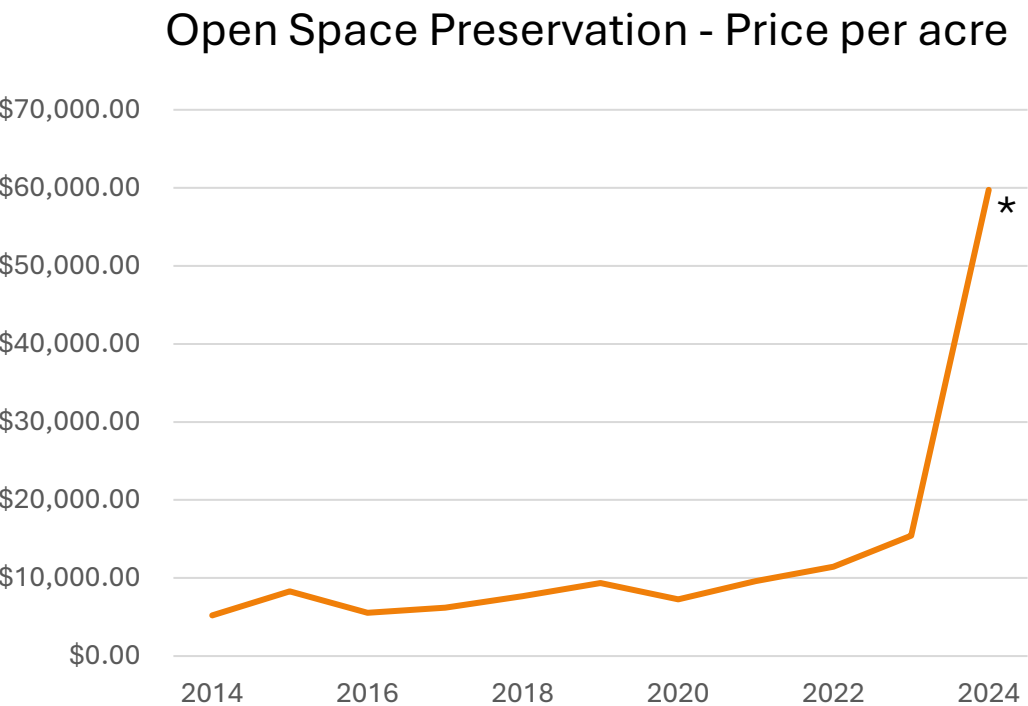


Land Use Land Cover data

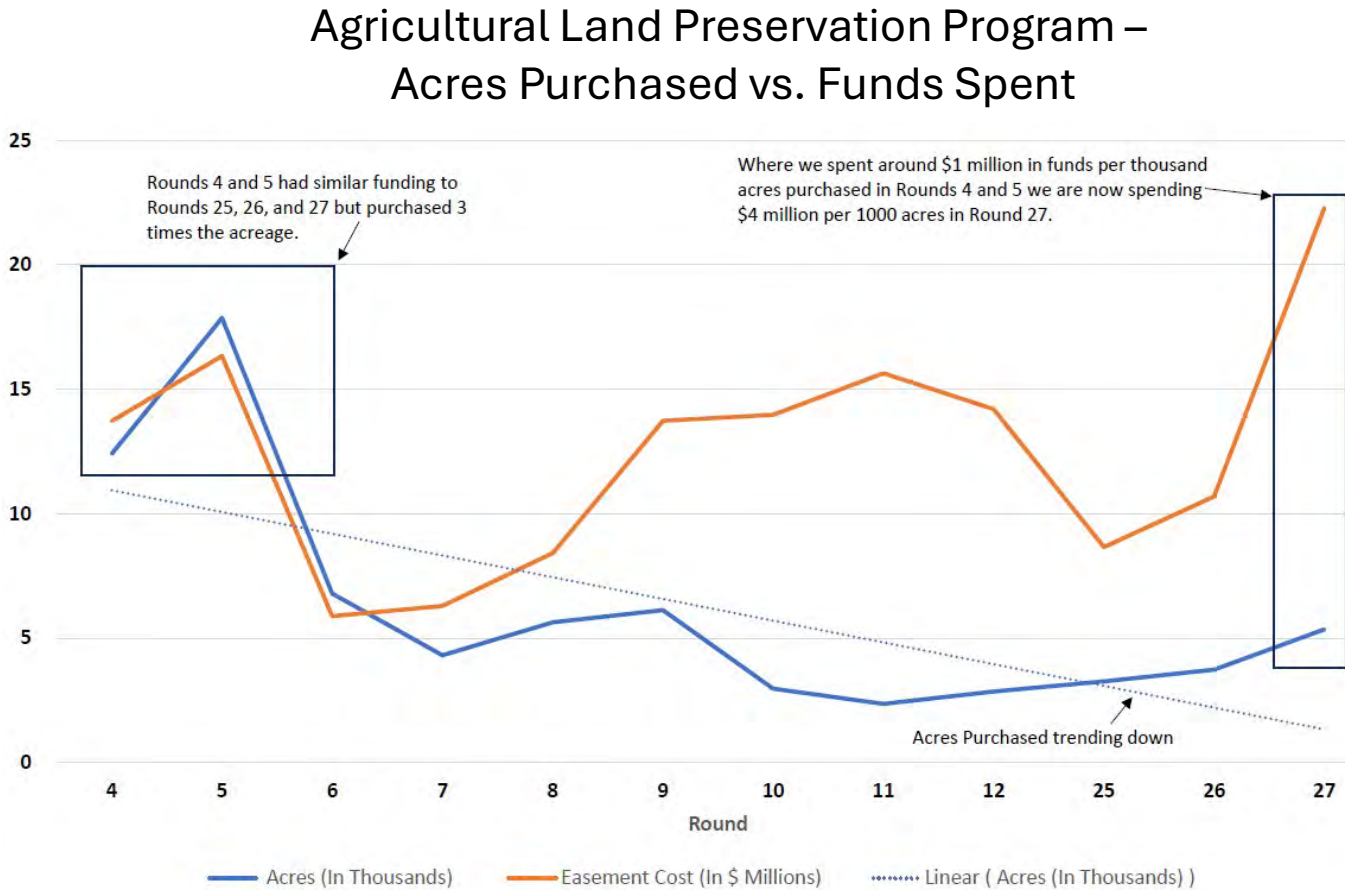
LULC – Land Use Land Cover

FIA - Forest Inventory and Analysis

Environment – Preservation Efforts and Challenges

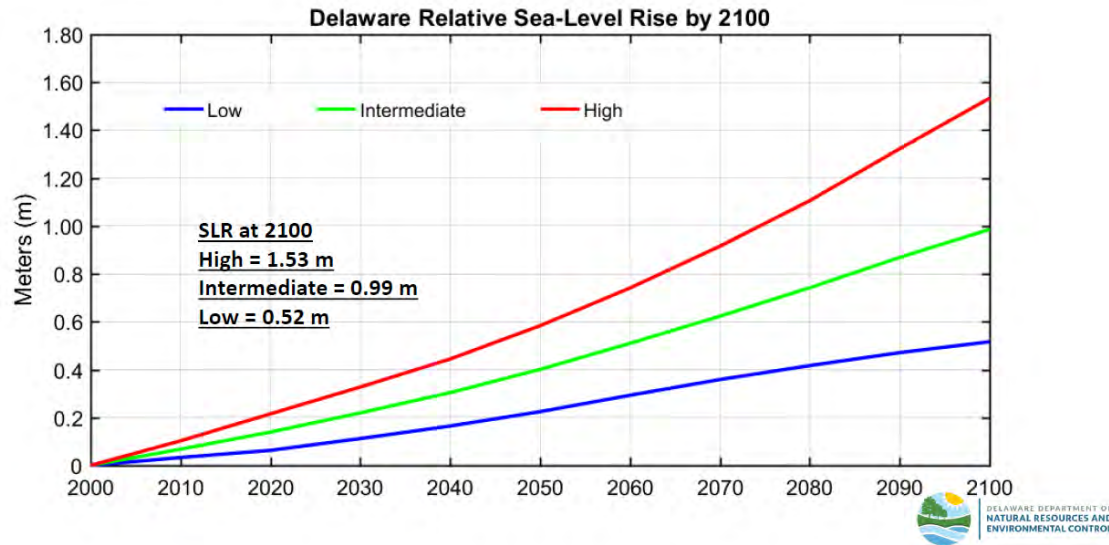


*Note: Price spike in 2023 and 2024 due to a key 285-acre land purchase adjacent to White Clay Creek State Park.



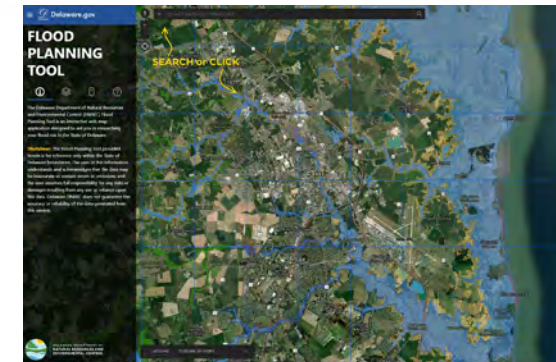
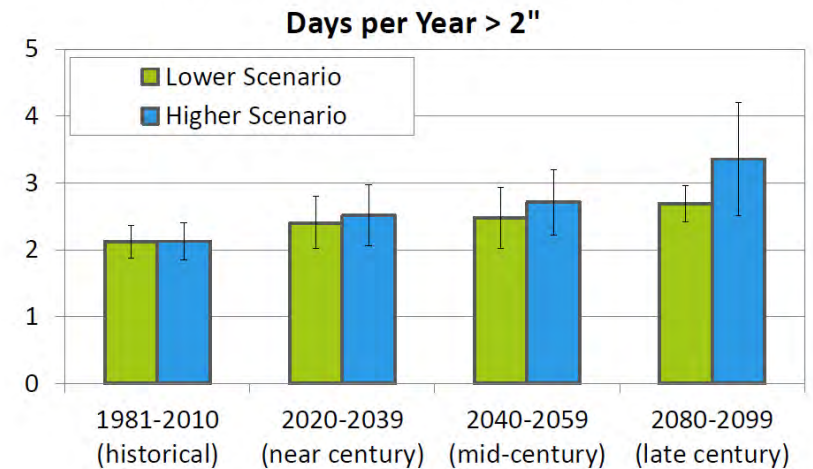
Environment – Resiliency and Adaptation

Sea Levels will continue to rise



- Marsh migration
- Saltwater intrusion
- Coastal development and infrastructure
- Accessibility – regular travel, emergency, and evacuation

Days with very heavy precipitation are expected to increase



Economy – Industry and Economic Development

Current industries:

Delaware total jobs: 625,328

Sussex County total jobs: 128,504

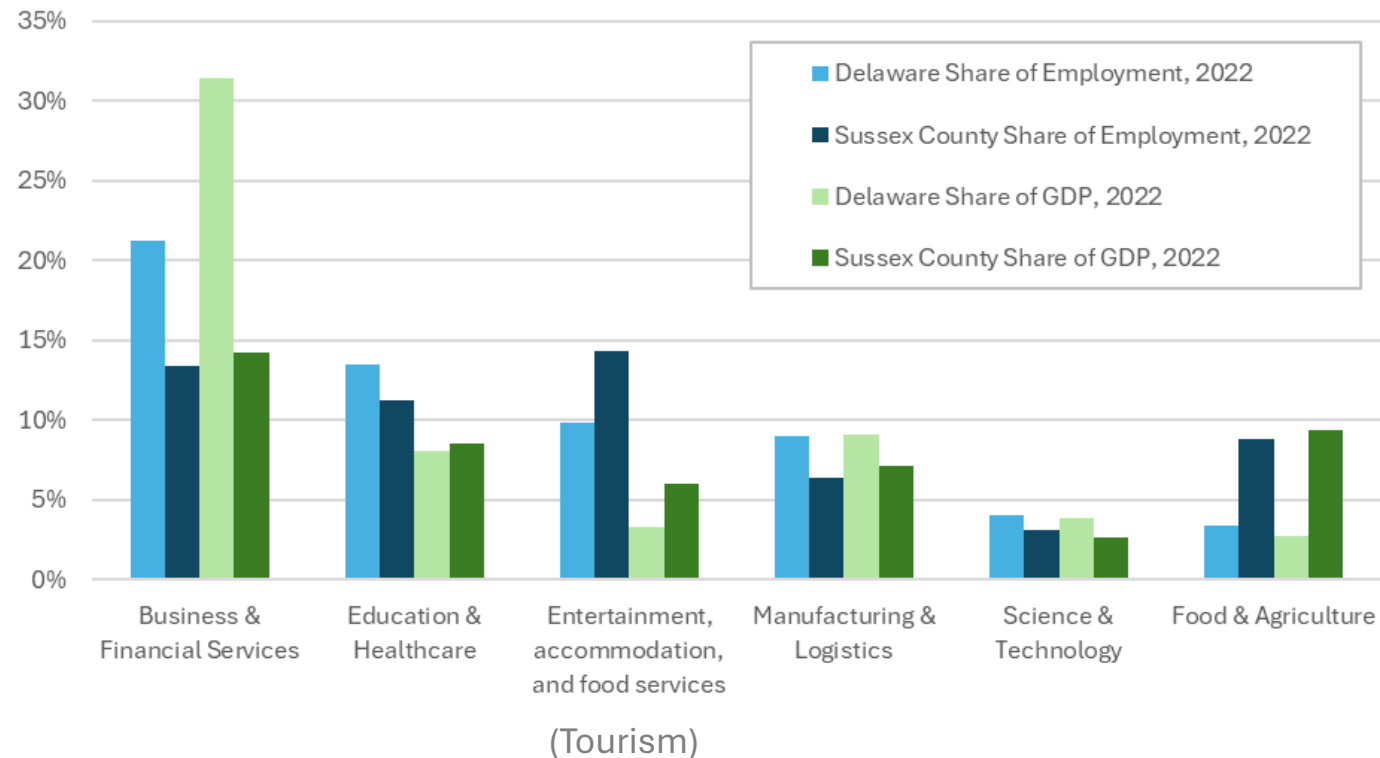
Delaware total GDP: \$90.4 billion

Sussex County GDP: \$14.5 billion

Future industries?

- Fintech and associated sectors?
- Aviation and enhanced logistics?
- Green jobs and alternative energy?
- Biosciences and advanced industries?

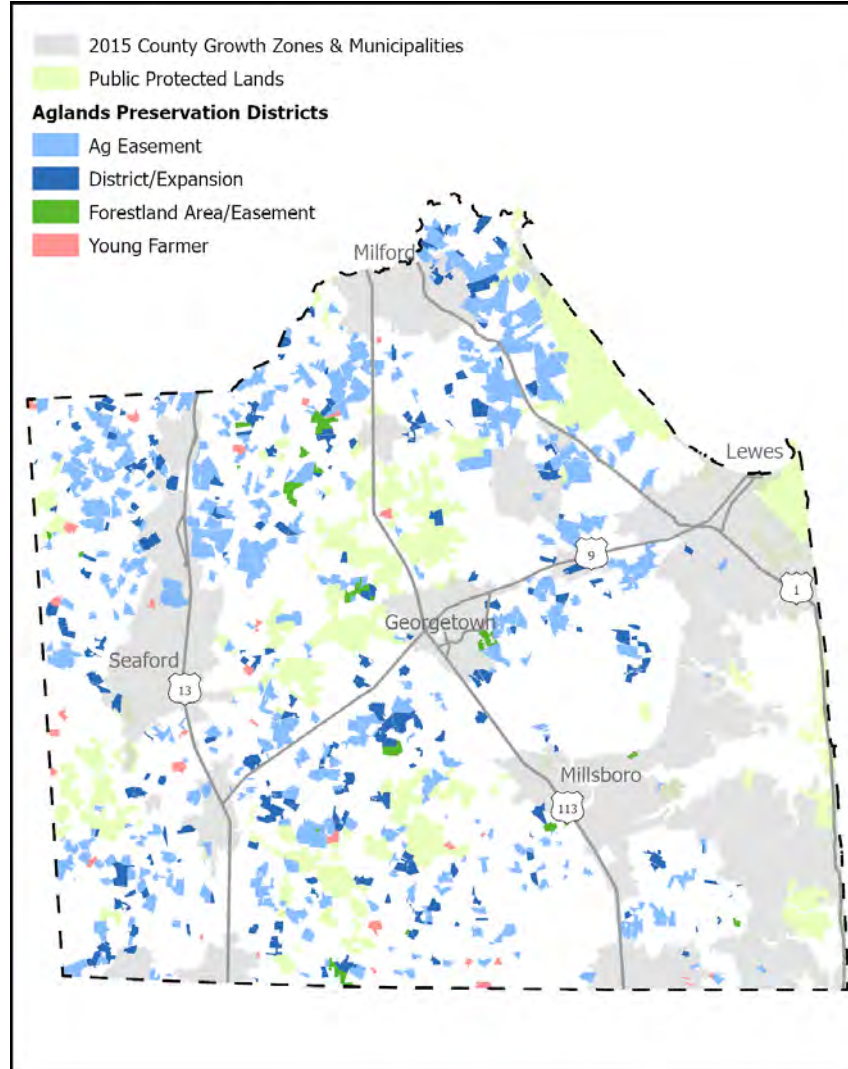
Key Economic Sectors in Delaware and Sussex County



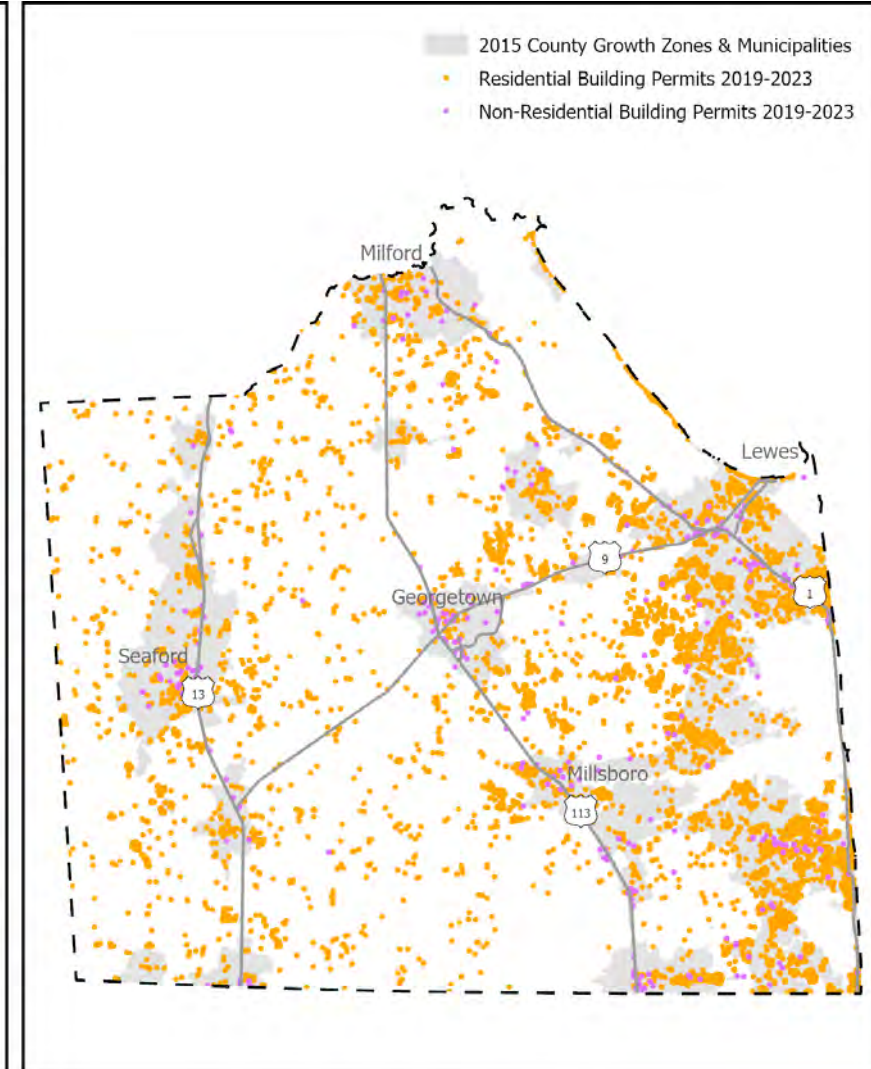
Economy – Concerns

- Land conversion
- Physical space needs
- Nuisance issues
- Freight / transport concerns
- Environmental decline

Land Preservation (through Oct 2024)

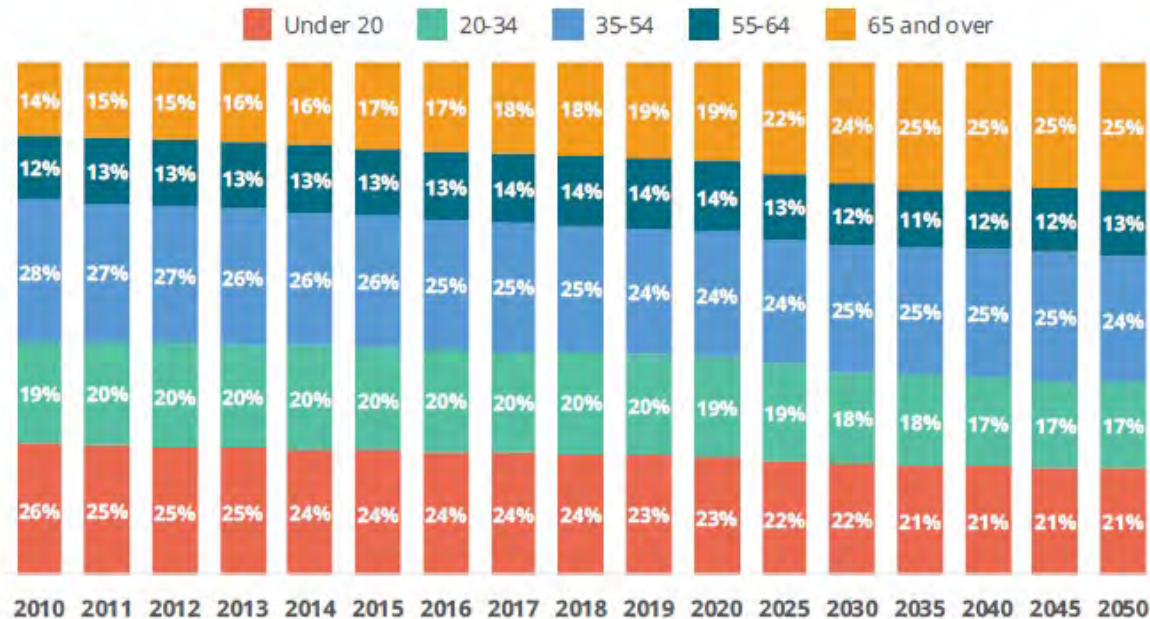


Development (building permits, 2019-2023)



Economy – Workforce

Population Projections by Age, Delaware, 2010 - 2050



- Labor force participation rate fell below national average in 2009.
- Consistent decline in share of residents in prime working years may signal worker shortage.

Public Assistance Trends, Sussex County

	2006		2022	
Total households	73,397		104,848	
With earnings	53,913	73.5%	67,245	64.1%
With Social Security	27,032	36.8%	49,858	47.6%
With retirement income	20,837	28.4%	45,531	43.4%
With Supplemental Security Income	1,697	2.3%	4,523	4.3%
With cash public assistance income	1,605	2.2%	2,288	2.2%
With Food Stamp benefits in the past year	5,214	7.1%	8,347	8.0%

- Low earning growth for health care and low-wage service workers may also make it difficult to maintain workforce needed to support senior healthcare needs.
- Further squeezed by housing shortage/ housing burdens.

Housing – Statewide Needs

 **Root Policy Research**
6740 E Colfax Ave, Denver, CO 80220
www.rootpolicy.com
970.880.1415

Delaware State Housing Authority

Statewide Housing Needs Assessment

PREPARED FOR:
Delaware State Housing Authority
Dover, DE 19901
www.destatehousing.com
888-363-8808

CREATED
November 2023

 **24,400***
new residential
housing units
are needed **by 2030** to
meet expected growth.

**These 24,400 units are in addition to the existing shortage of ~19,400 rental units affordable to households making 0–50% Area Median Income (AMI).*



*That's an
average of
2,400
new units
per year.*



**Where are these
residential units needed?**

4,016 New Castle County
6,941 Kent County
13,392 Sussex County

Over half of these new builds need to be affordable for households below 100% AMI...



12,723
new residential
housing units
must be affordable to households
making less than 100% AMI
(or \$66,400 for 2 people).

7,523
ownership units



5,200
rental units



*That's an average
of **1,200** new
units per year.*

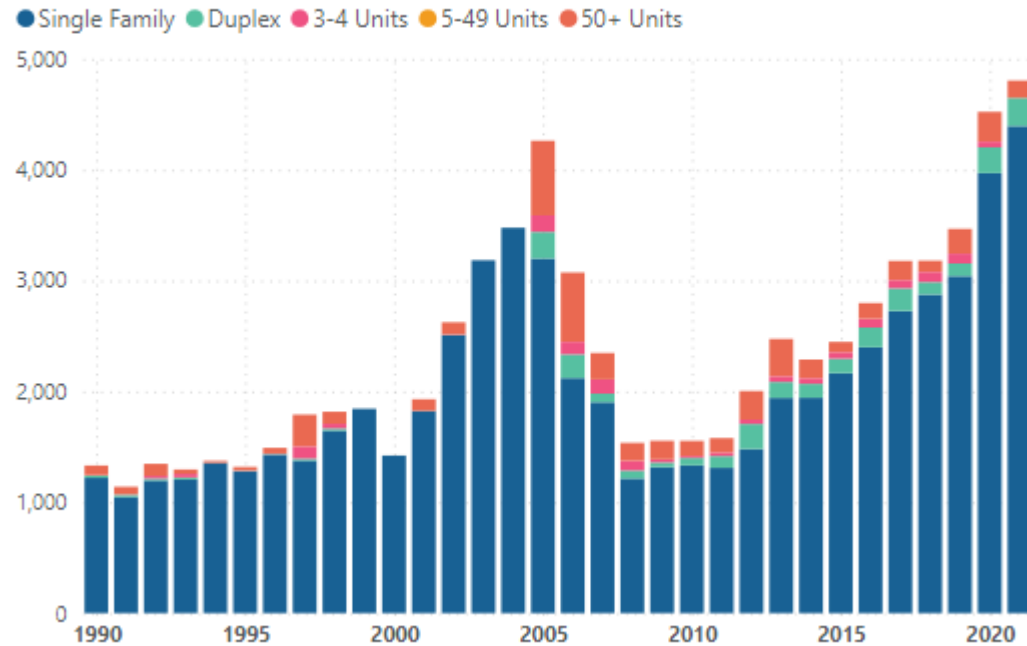
Housing



Statewide, the number of units needed to keep up with growth by 2030 are *in addition* to the current shortage of 19,400 units that are affordable to HHs making 0-50% AMI.

Housing – Sussex County

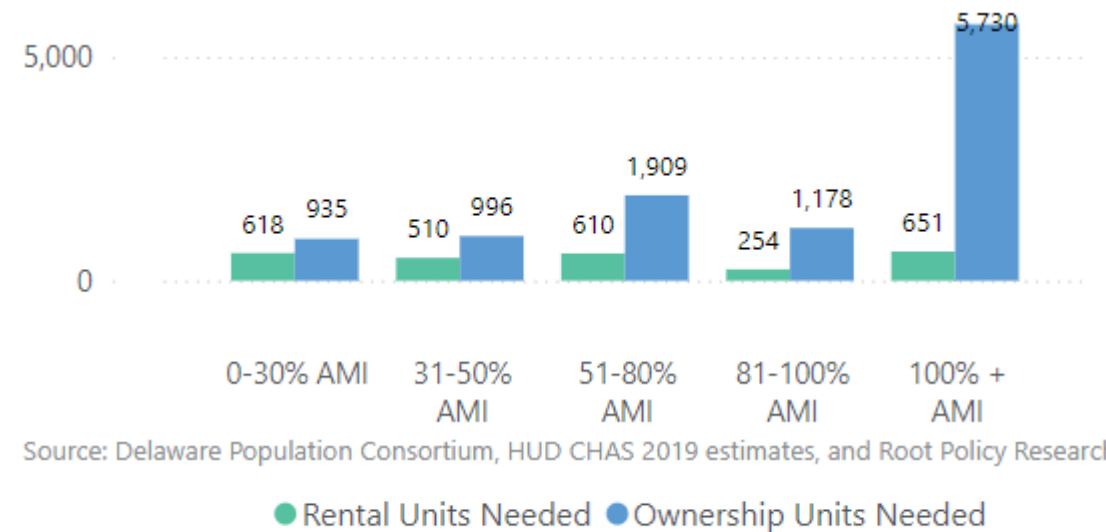
New Units Permitted by Structure Type, 1990-2021
Sussex County



Source: U.S. Housing Production Report

Only about 15% of the permitted units over the last 5 years were multi-family units, which suggest a greater diversity of housing is needed in the county.

Projected new housing units needed by 2030:



Source: Delaware Population Consortium, HUD CHAS 2019 estimates, and Root Policy Research

Total: 13,392 needed, of which:

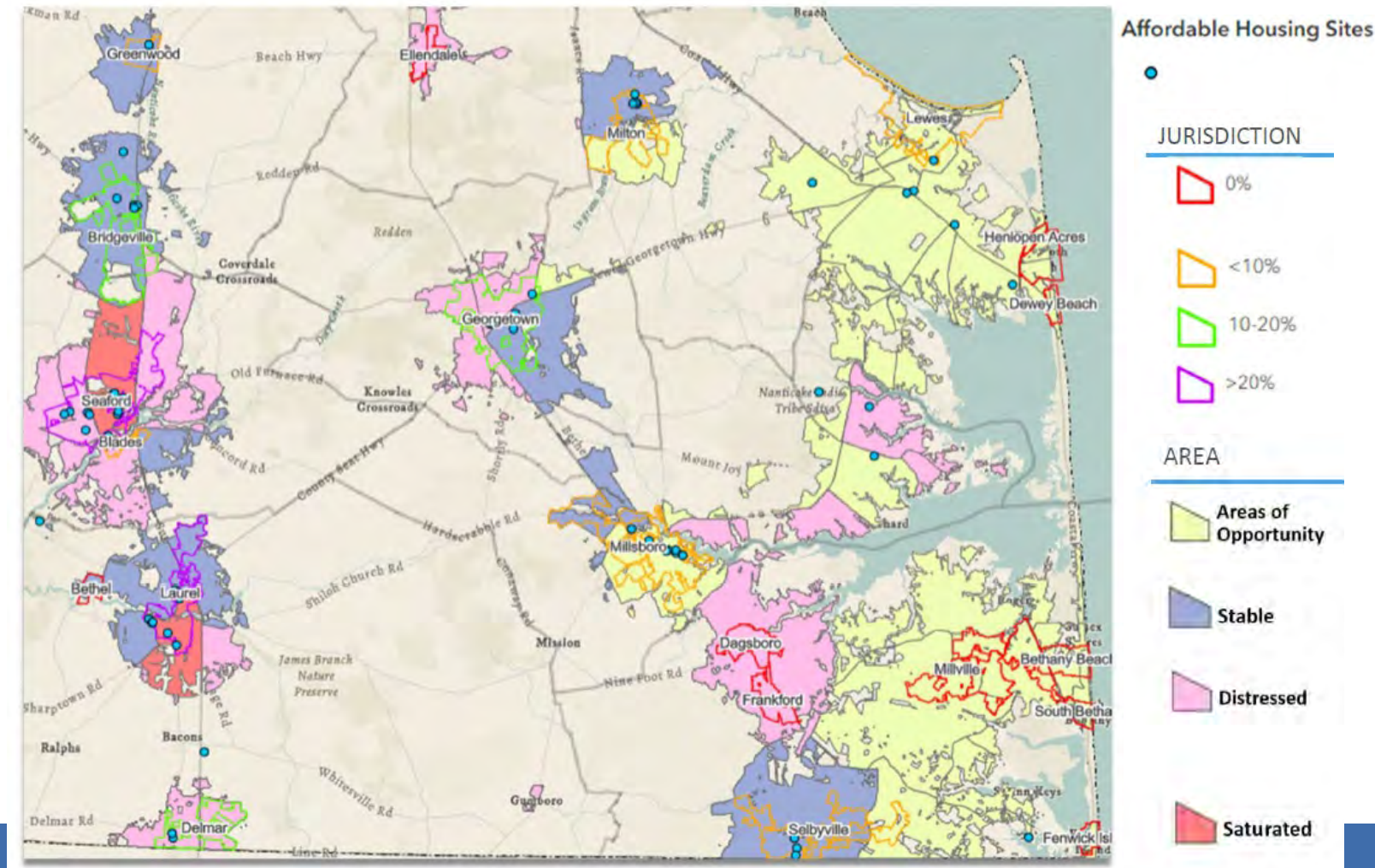
- 80% should be for homeownership
- 20% should be for renters

Housing – Strategies

Current distribution of affordable housing:

- Western Sussex County is saturated with affordable housing
 - bears more than ‘equitable share’
 - distressed areas need stabilization and supportive infrastructure
 - school proficiency is substantially lower than eastern half
- Coastal Resort Areas have very few affordable housing options (< 1%)
 - strong, presence of:
 - high-value markets
 - employment centers
 - high-performing schools
 - affordable housing should be encouraged in Areas of Opportunity

Sussex County





STATE OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES
Data Analysis Workgroup

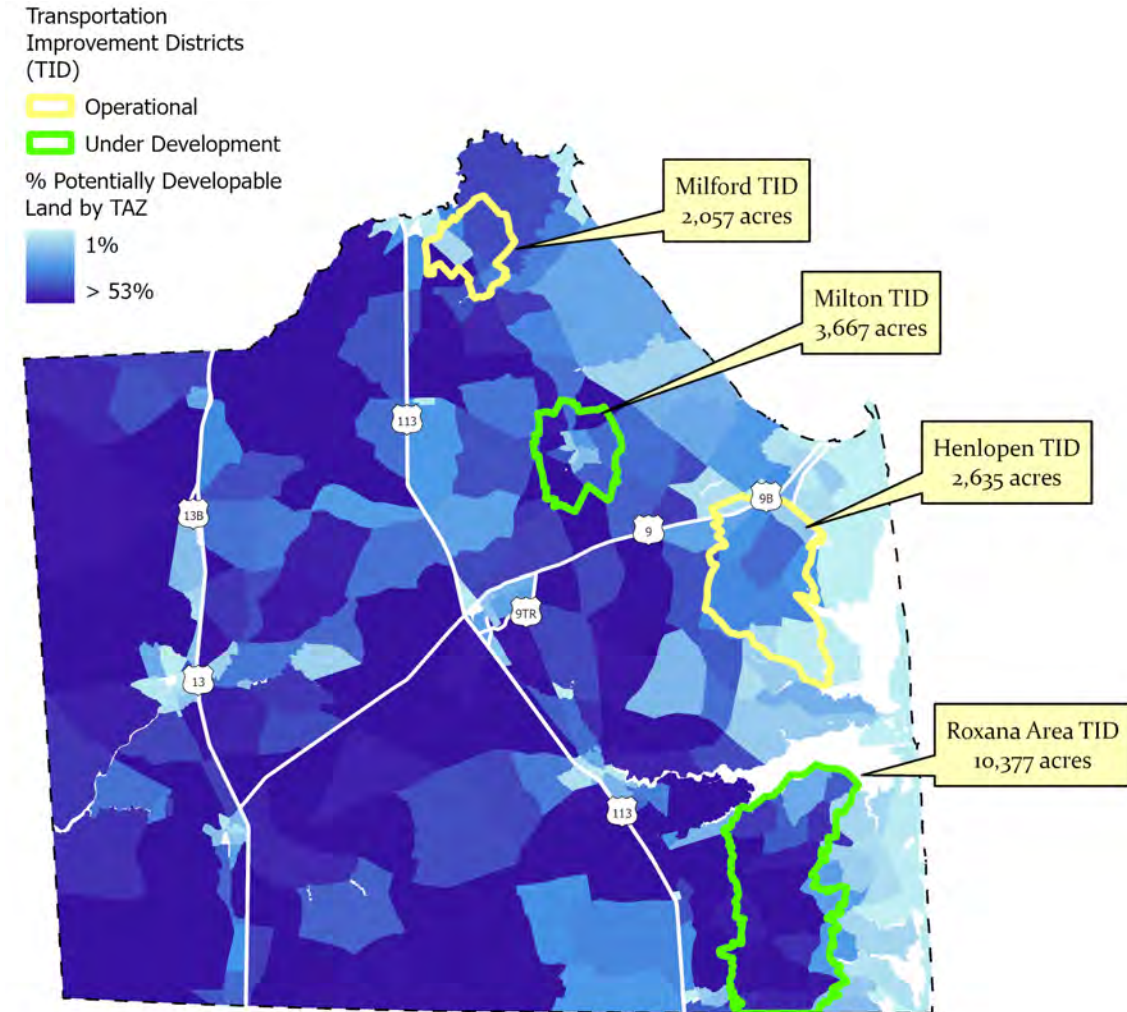
Conclusions and Discussion

What resonates? What is your experience?

Concluding Points

Transportation Improvement District (TID)		Forecast Year	Dwelling Units		
			SUPPLY		DEMAND
SUSSEX	SE Milford	2045	8,864	39,633	33,678
	Henlopen	2045	13,000		
	Milton	2045	4,972		
	Roxana Area	2045	12,797		

- Greenfield development in TIDs plus redevelopment and infill should accommodate significantly more development than what is forecasted by the Delaware Population Consortium

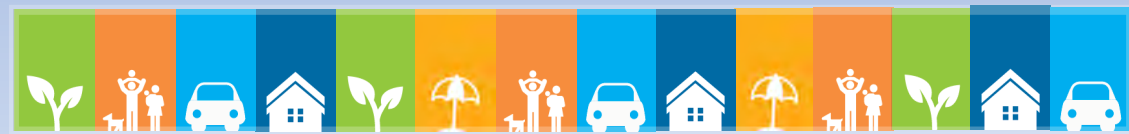


* labels show acres of potentially developable land in Levels 1, 2 and 3 in each TID



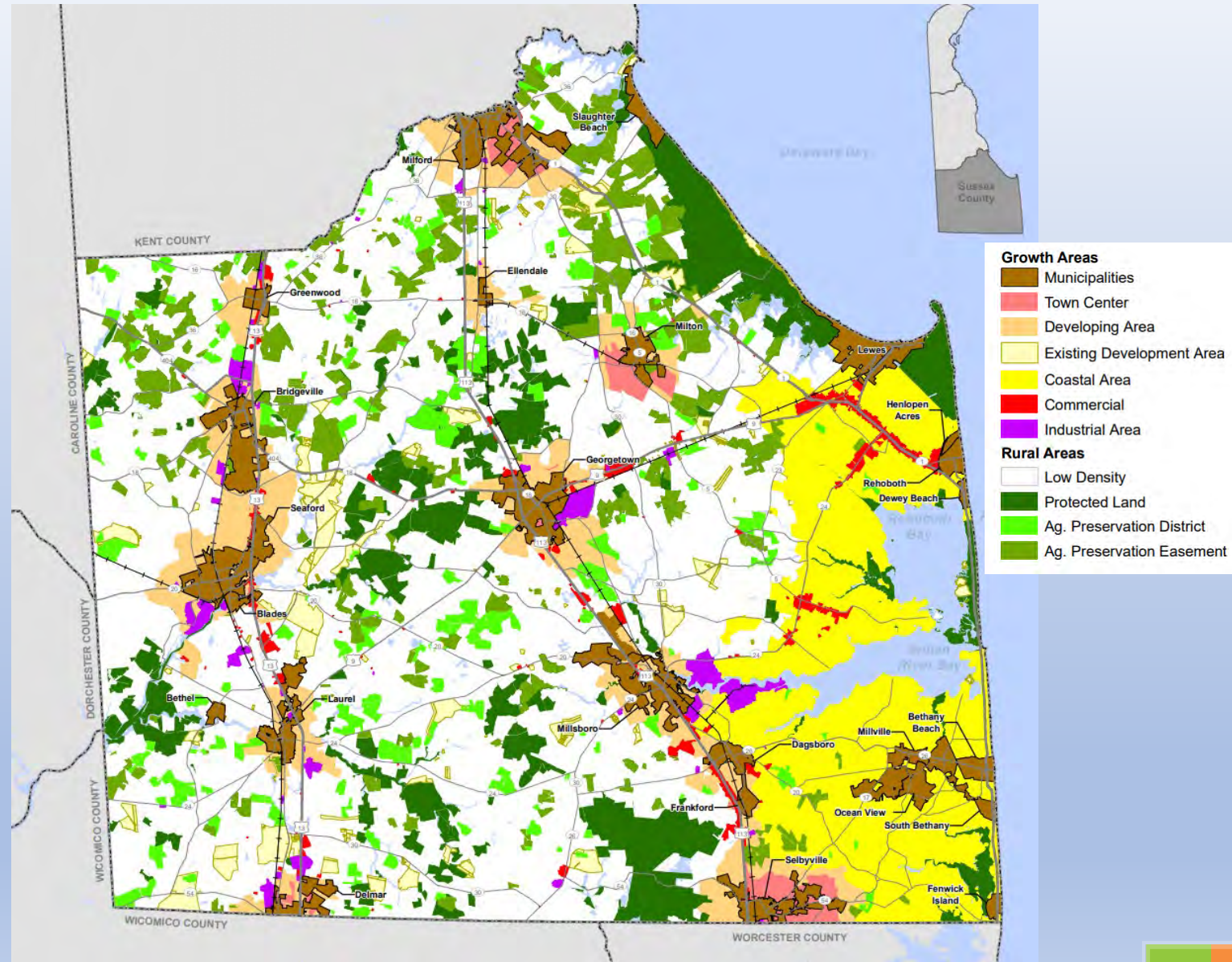
Building Collaborative Perspectives on Growth and Development

December 18, 2024





• Adopted Dec 2018 and Certified March 2019




THE SUSSEX PLAN

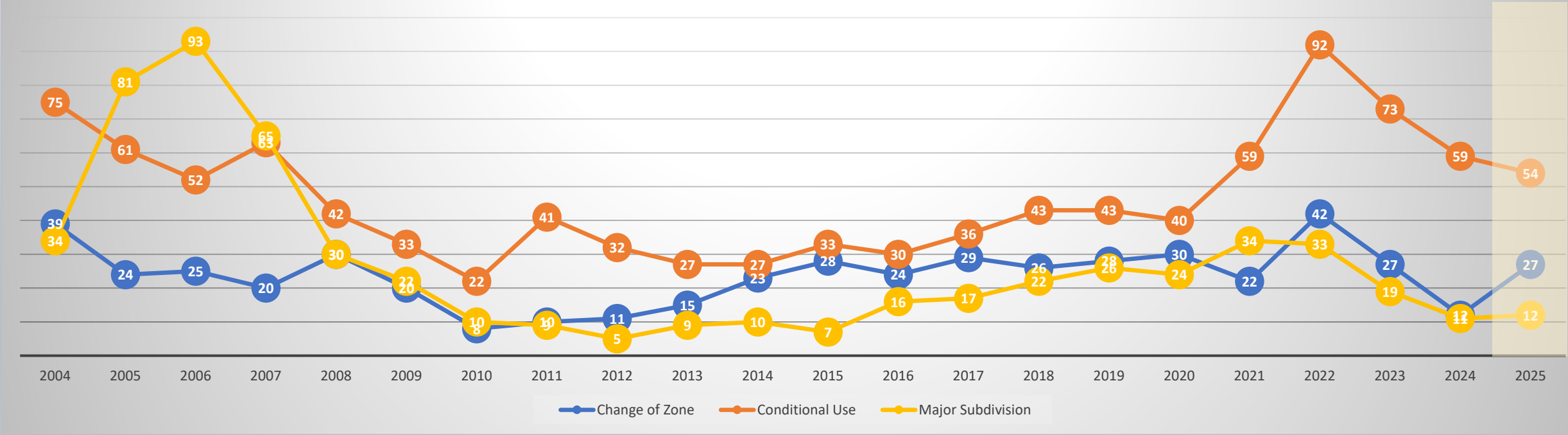
SUSSEX COUNTY COMPREHENSIVE PLAN
FINAL MARCH 2019

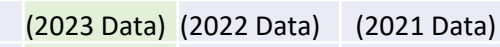
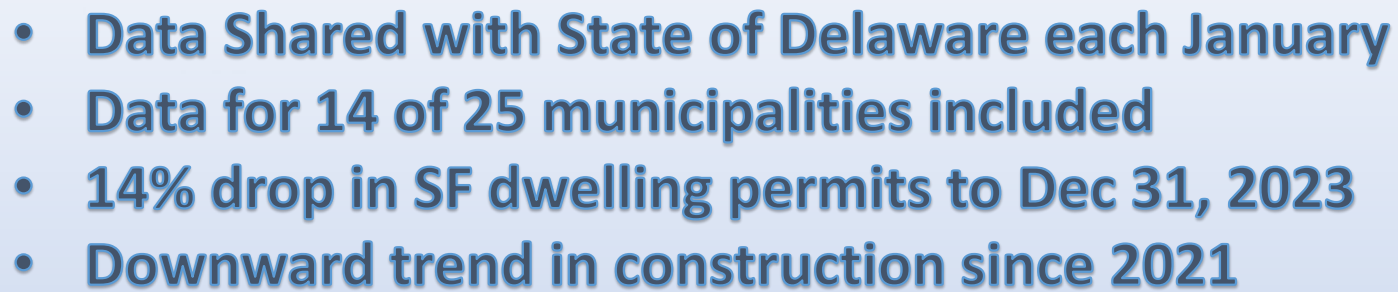


FLUM Element of Comprehensive Plan



Fiscal Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Change of Zones	39	24	25	20	30	20	8	10	11	15	23	28	24	29	26	28	30	22	42	27	12	27
Conditional Uses	75	61	52	63	42	33	22	41	32	27	27	33	30	36	43	43	40	59	92	73	59	54
Major Subdivision Lots Proposed	5951	10711	4423	4380	1586	582	511	523	151	1011	380	79	651	6985	5863	3478	941	1836	3375	1780	3407	213
Major Subdivision Applications	34	81	93	65	30	22	10	9	5	9	10	7	16	17	22	26	24	34	33	19	11	12
Total Site Plans Reviewed																	342	323	379	430	362	447
BOA Applications	467	438	416	328	314	247	216	179	185	230	189	188	192	191	174	162	113	130	89	131	88	114

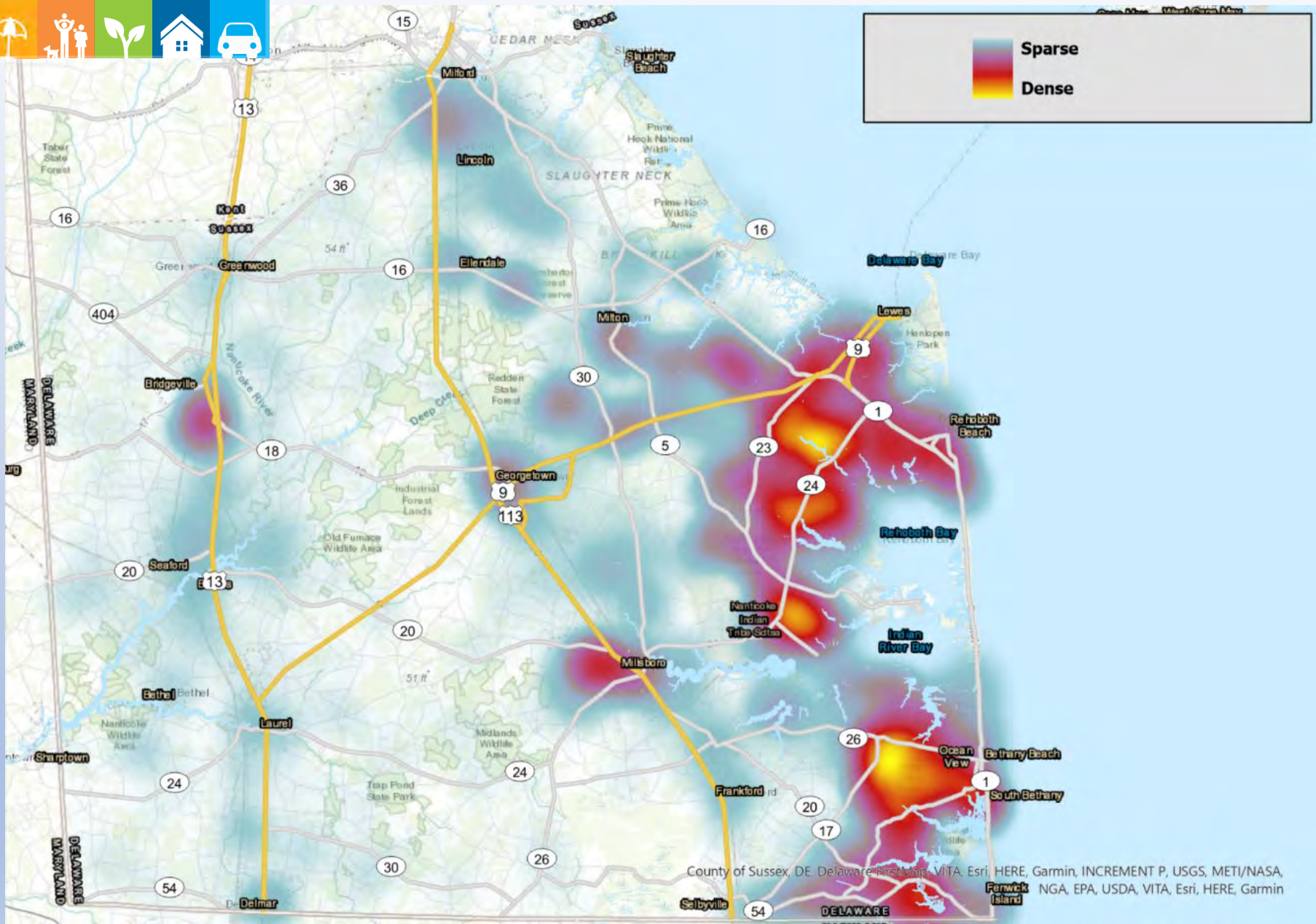




Additional Metrics



- **2017-2024 County-wide Permit distribution**
- **In-Town and Out-of-Town shown**
- **County provides permitting services for 14 of the 25 Municipalities in the County**



Spatial Distribution of Building Permits





2020 Delaware Strategies for State Policies and Spending

Data Sets Included in Analysis for State Strategies Map

Data Sets Favoring Growth

Planned Growth

- County Growth Areas
- Municipalities
- Municipal Annexation Areas
- Transfer-of-Development-Rights (TDR) Receiving Areas
- Urban Areas from the 2010 Census
- Built Areas from the 2012 Land Use Land Cover dataset
- DelDOT Transportation Improvement Districts

Services

- Bus Stops
- Bike/Pathways/Trails
- Public Libraries
- Public Schools
- State Service Centers

Safety

- Fire Stations
- EMS Free Standing Locations
- Hospitals and Emergency Centers
- Local Police

Utilities

- County Sewer
- Wastewater Certificates of Public Necessity (inside all growth areas)
- Public Water Supply (inside all growth areas)

Data Sets Favoring Preservation

Natural Resources

- Coastal Zone
- 100-Year Floodplain
- Excellent Groundwater Recharge
- Non-Tidal Wetlands
- Tidal Wetlands
- Wellhead Protection Areas
- Delaware Ecological Network

Resiliency

- Coastal Inundation – 3-foot scenario
- Flood Risk Adaptation Map

Agriculture/Forest

- Agricultural Land of Importance
- Agricultural Preservation
- Forested Land of Importance

Limits on Growth

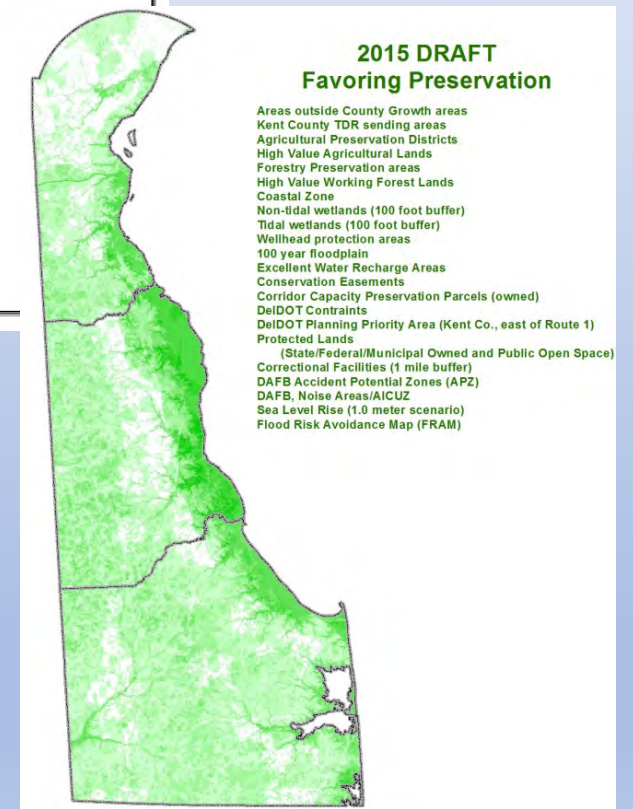
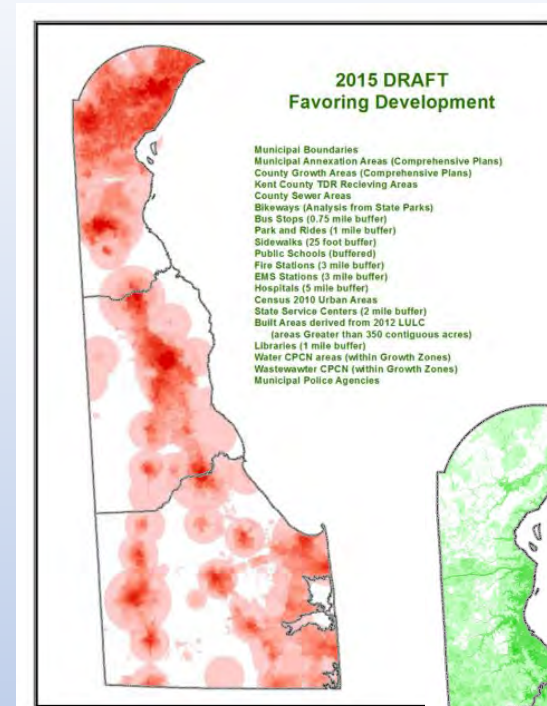
- DelDOT Corridor Capacity
- Areas East of Route 1 in Kent County
- TDR Sending Areas
- Areas outside of designated Growth areas

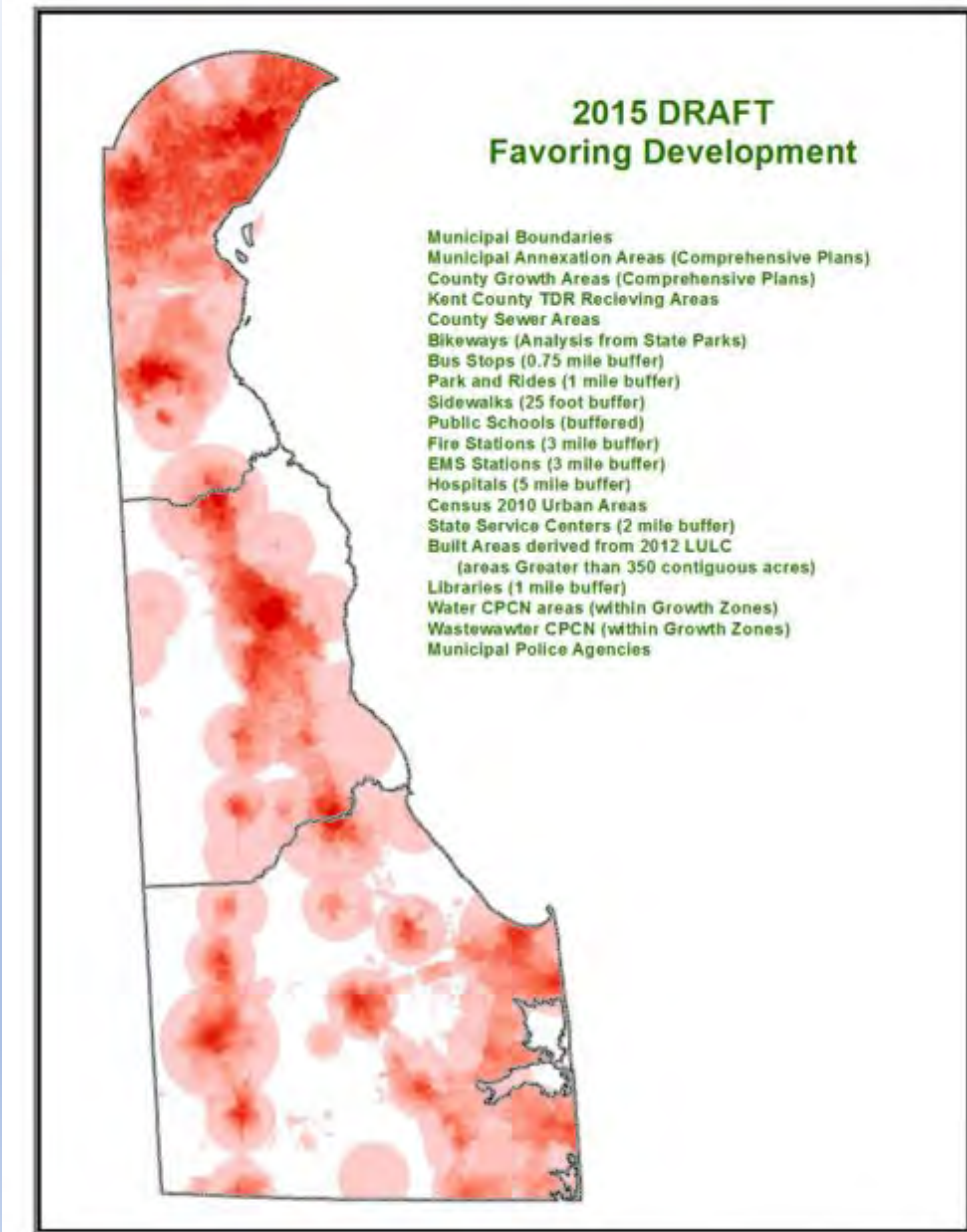
Miscellaneous Protection

- Corrections Facilities
- Dover Air Force Base Noise Zones (AICUZ)
- Dover Air Force Base – Accident Potential Zones

Data Sets for Out-of-play

- Permanent Agricultural and Forestry Preservation and Conservation Easements
- DelDOT Purchased Development Rights
- DelDOT Preservation lands
- 100-Year Floodplains (New Castle and Kent County only)
- Protected Lands (federal, state, county, municipal, and dedicated public open space)
- Tidal Wetlands
- Dover Air Force Base





Municipal Boundaries
 Municipal Annexation Areas (Comprehensive Plans)
 County Growth Areas (Comprehensive Plans)
 Kent County TDR Relieving Areas
 County Sewer Areas
 Bikeways (Analysis from State Parks)
 Bus Stops (0.75 mile buffer)
 Park and Rides (1 mile buffer)
 Sidewalks (25 foot buffer)
 Public Schools (buffered)
 Fire Stations (3 mile buffer)
 EMS Stations (3 mile buffer)
 Hospitals (5 mile buffer)
 Census 2010 Urban Areas
 State Service Centers (2 mile buffer)
 Built Areas derived from 2012 LULC
 (areas Greater than 350 contiguous acres)
 Libraries (1 mile buffer)
 Water CPCN areas (within Growth Zones)
 Wastewater CPCN (within Growth Zones)
 Municipal Police Agencies

Geospatial data sets that show land-use policies were collected from state agencies and county and municipal governments. Each data set was processed into a standard, statewide, 30-meter grid format in which each grid cell was given a positive or a negative value reflecting its suitability for development or redevelopment.

Each grid-cell has a value of between -13 and 18. These values were classified into logical groups to form a set of the four levels called for in the Strategies for State Policies and Spending. These were smoothed and saved as a polygon GIS data set.





2015 DRAFT Favoring Preservation

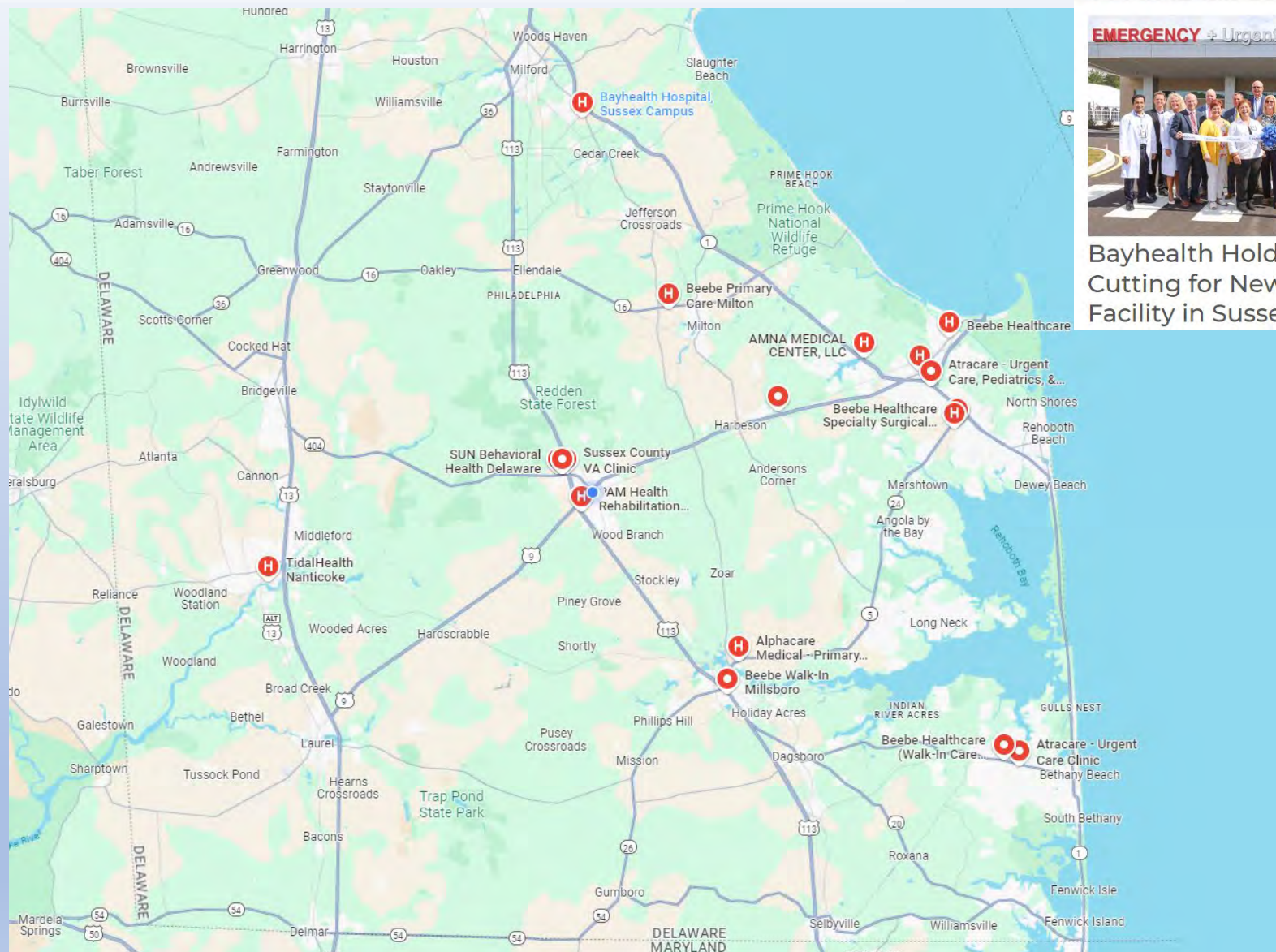
Areas outside County Growth areas
 Kent County TDR sending areas
 Agricultural Preservation Districts
 High Value Agricultural Lands
 Forestry Preservation areas
 High Value Working Forest Lands
 Coastal Zone
 Non-tidal wetlands (100 foot buffer)
 Tidal wetlands (100 foot buffer)
 Wellhead protection areas
 100 year floodplain
 Excellent Water Recharge Areas
 Conservation Easements
 Corridor Capacity Preservation Parcels (owned)
 DelDOT Constraints
 DelDOT Planning Priority Area (Kent Co., east of Route 1)
 Protected Lands
 (State/Federal/Municipal Owned and Public Open Space)
 Correctional Facilities (1 mile buffer)
 DAFB Accident Potential Zones (APZ)
 DAFB, Noise Areas/AICUZ
 Sea Level Rise (1.0 meter scenario)
 Flood Risk Avoidance Map (FRAM)

Areas outside County Growth areas
 Kent County TDR sending areas
 Agricultural Preservation Districts
 High Value Agricultural Lands
 Forestry Preservation areas
 High Value Working Forest Lands
 Coastal Zone
 Non-tidal wetlands (100 foot buffer)
 Tidal wetlands (100 foot buffer)
 Wellhead protection areas
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 Protected Lands
 (State/Federal/Municipal Owned and Public Open Space)
 Correctional Facilities (1 mile buffer)
 DAFB Accident Potential Zones (APZ)
 DAFB, Noise Areas/AICUZ
 Sea Level Rise (1.0 meter scenario)
 Flood Risk Avoidance Map (FRAM)

Geospatial data sets that show land-use policies were collected from state agencies and county and municipal governments. Each data set was processed into a standard, statewide, 30-meter grid format in which each grid cell was given a positive or a negative value reflecting its suitability for development or redevelopment.

Each grid-cell has a value of between -13 and 18. These values were classified into logical groups to form a set of the four levels called for in the Strategies for State Policies and Spending. These were smoothed and saved as a polygon GIS data set.





Beebe relocates walk-in care site to new hospital

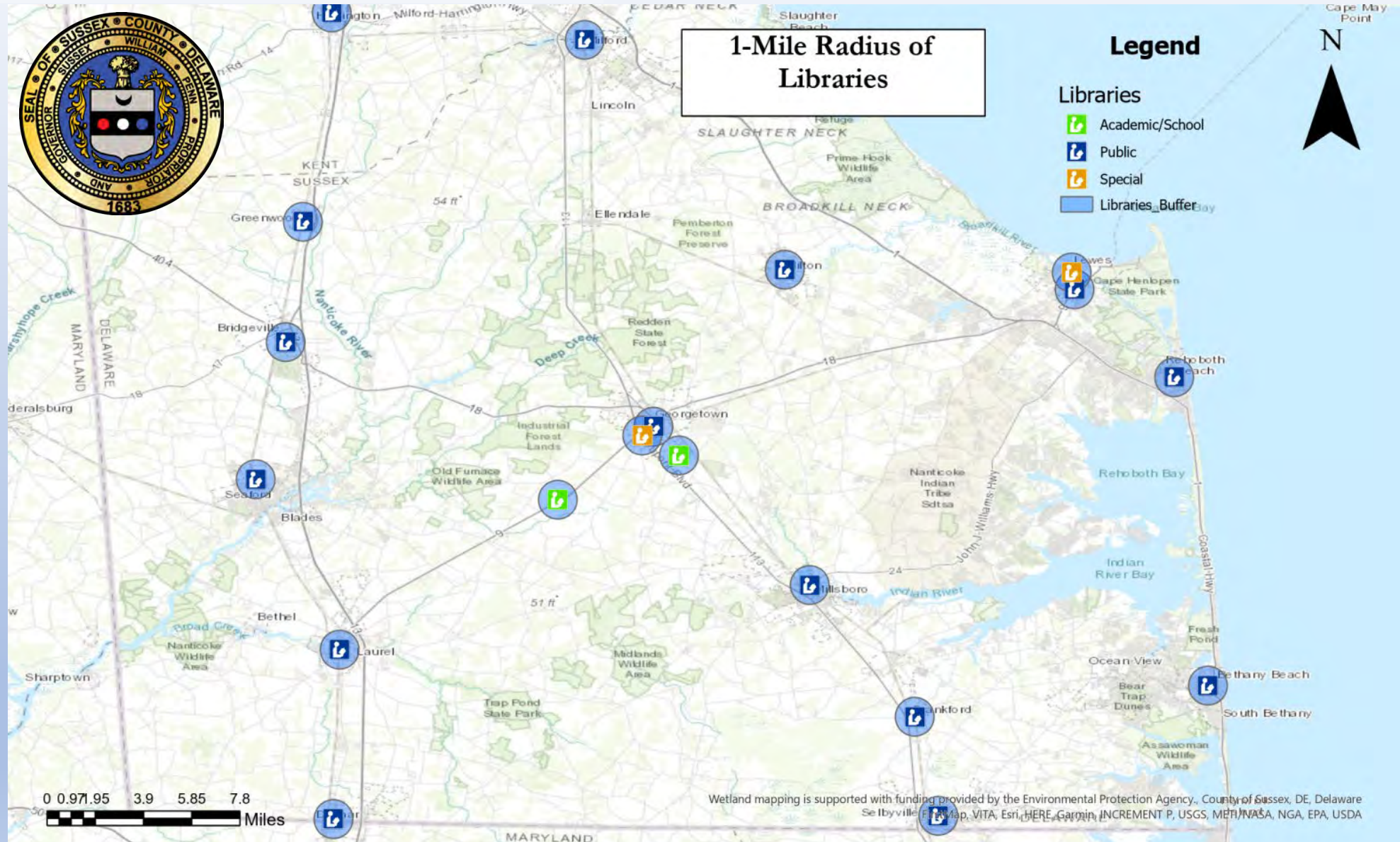
Project is final phase of multiyear, \$200 million campaign; more centers planned



- June 9, 2023 – Beebe Healthcare Walk-In Facility, Healthy Way, Rehoboth Beach
- July 11, 2023 – Bayhealth's Emergency and Urgent Care Centre, Rt. 9

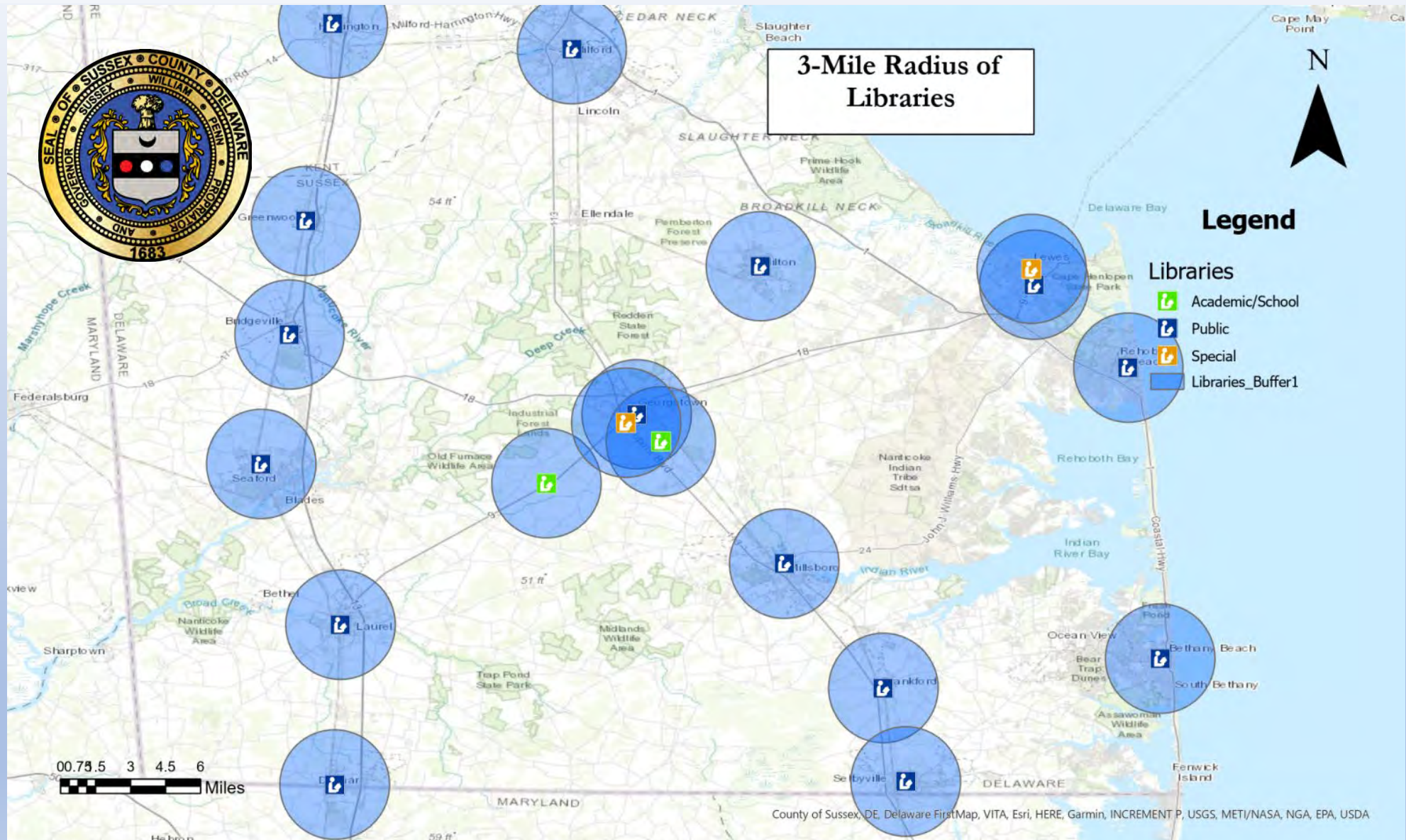


New Hospitals and Walk-In Facilities Since 2020



Libraries – Current 1-mile buffer



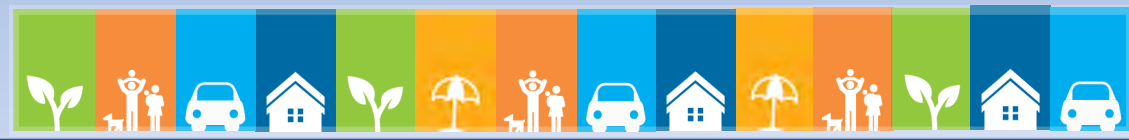


Libraries 3-mile buffer



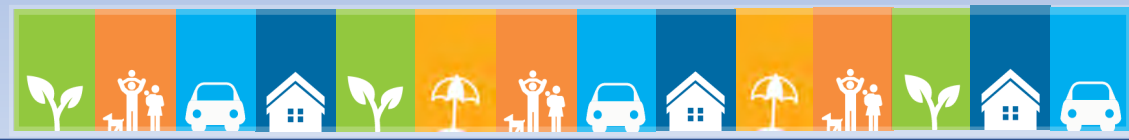


Questions?



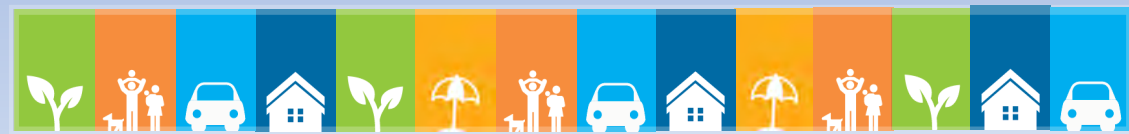


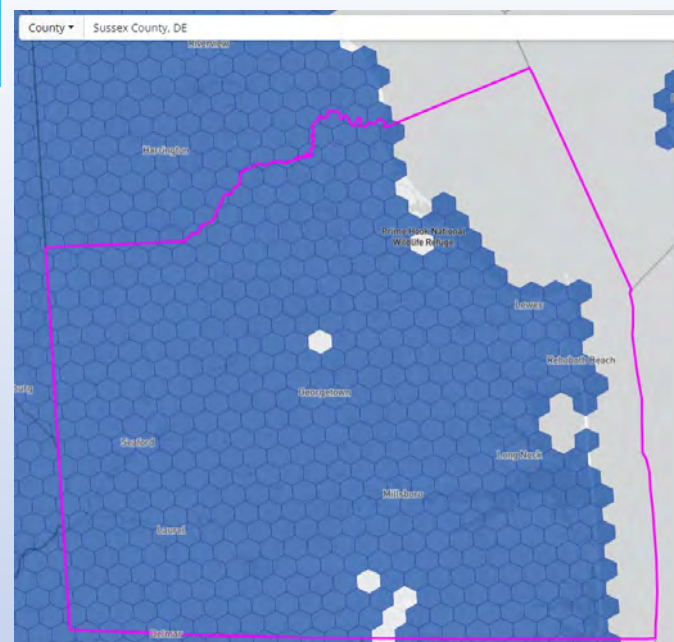
Questions?



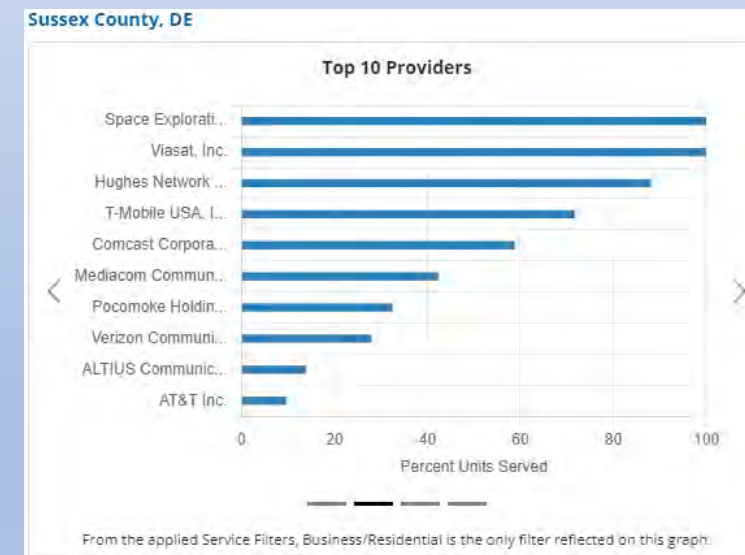
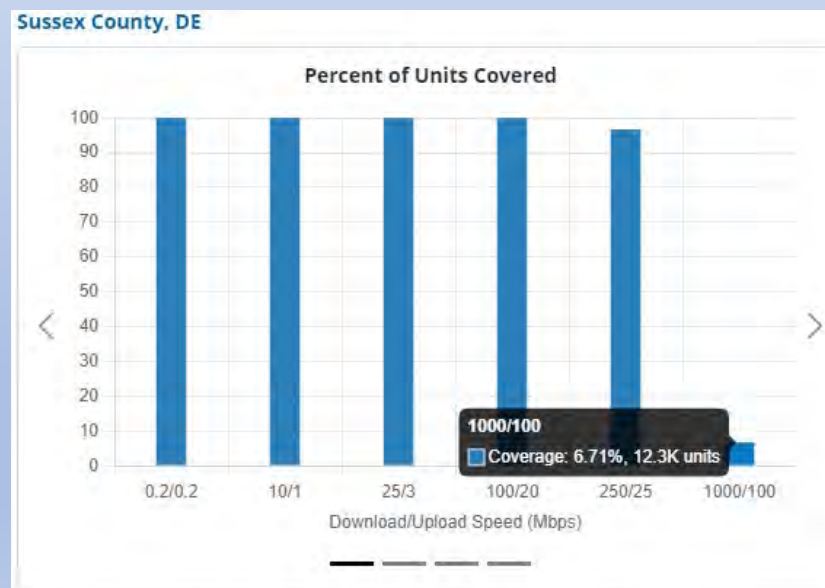


Additional Slides





6.71% of Sussex County's Population have access to 250 mega-bit (down), 25 mega-bit (up) speeds or greater through fiber optic

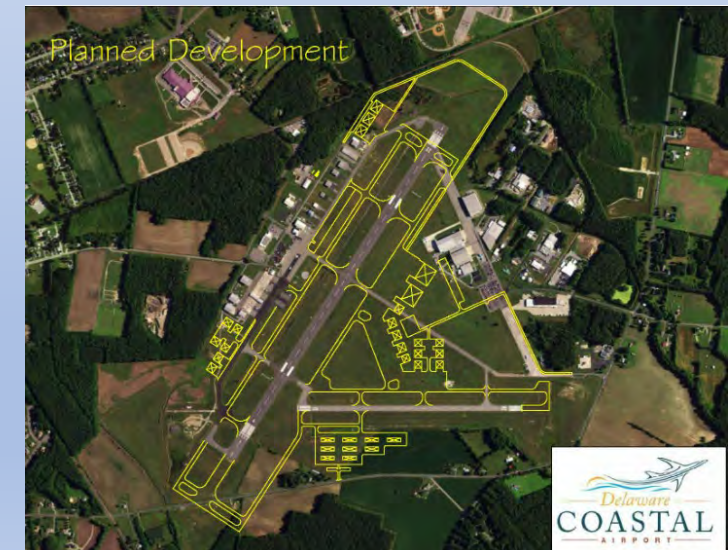
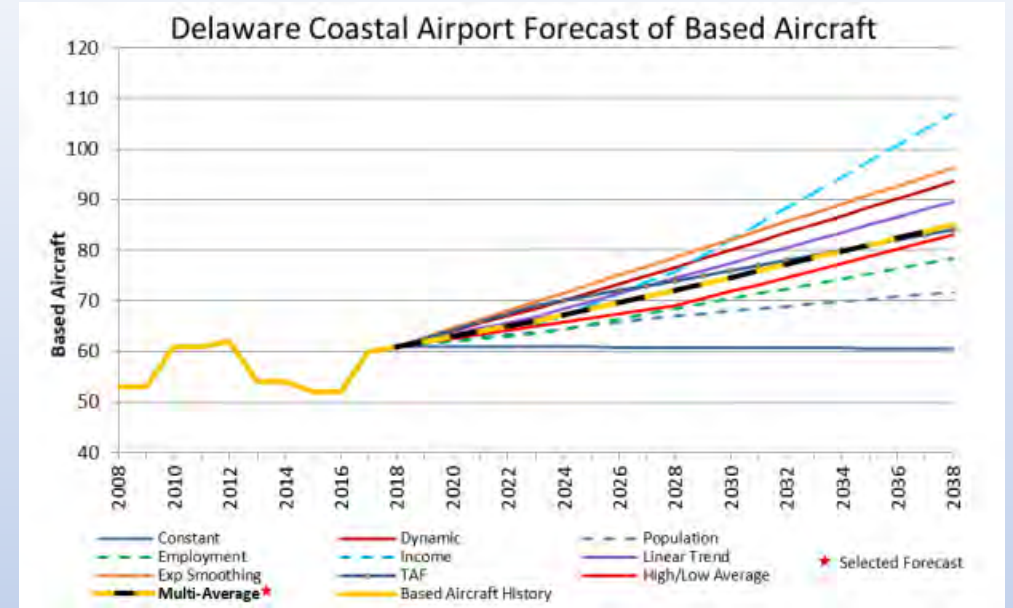
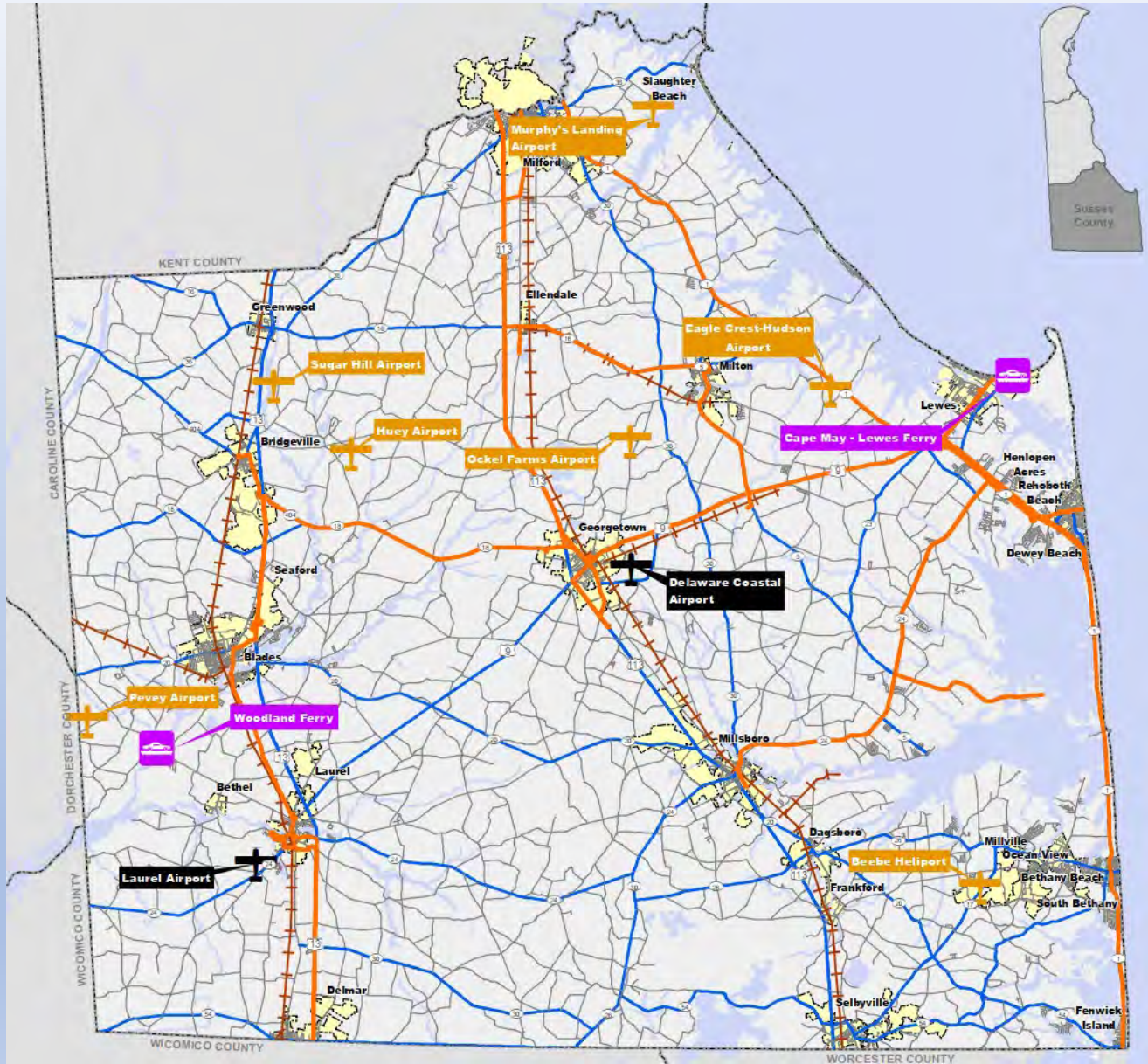


From the applied Service Filters, Business/Residential is the only filter reflected on this graph





- 5,500-ft main runway to be extended to 6,000 ft.



Source: Passenger Air Terminals

Appendix D: Workshop Comments by Topic

Following are comments recorded during the breakout groups in each County, organized by the four breakout group themes: Transportation, Environment, Economic Development, and Housing. Comments in blue are from Kent County, red from New Castle County, and green from Sussex County.

Efforts were made to align comments about similar topics between the three workshops to make comparisons easier, but not all discussions touched on the same topics, so not all the boxes are filled in. There is some overlap and repetition between the responses from the three counties, which is the subject of Section 3 Synthesis. To see each county's comments separately, please see Appendices A – C.

Transportation

Figure 19. Workshop Comments from Transportation Breakout Group

Question 1: How can the state work with county and local governments to help guide new development toward Transportation Improvement Districts (TIDs) and other designated growth areas? Question 2: How should transportation infrastructure proposed outside of TIDs, and other designated growth areas be addressed and funded?		
Kent County	New Castle County	Sussex County
Development Outside TIDs/Growth Areas - Participants want to put more teeth into PLUS and the State Strategies, giving DelDOT the power to say no to development that cannot be efficiently supported with infrastructure. This would add to the credibility of PLUS - Require developers to pay more for infrastructure outside of growth areas	Development Outside of TIDs/Growth Areas - The state should have greater authority to deny funding for projects outside growth areas - Require developers to fund infrastructure improvements and maintenance and/or provide cost-sharing agreements	
Traffic and Transportation - Expand the geographic boundaries for TISs conducted outside of TIDs - Consider a comprehensive transportation investment policy; don't concentrate on TIDs at the expense of existing municipalities that need investment - Many stakeholders do not clearly understand TIDs and want to focus on a more comprehensive state or countywide transportation plan. There was strong agreement that a more streamlined development approval process would be beneficial.	Traffic and Transportation - Ensure traffic studies capture peak weekday and weekend scenarios - Focus on making transportation more inclusive and equitable - Consider sea-level rise in road investments and avoid funding roads likely to be inundated - Align Level of Service (LOS) standards with state strategies (stricter in Levels 3 and 4; more lenient in Levels 1 and 2) - Introduce a "fee-in-lieu" system for pedestrian facilities in Levels 1 and 2	

	TID Process Improvements • Create additional categories of TIDs, like corridors, to encourage collaborative growth • Ensure TID boundaries are binding but allow flexibility for addressing exceptions • Address concerns of developers penalized for being "late" in TID processes	TID Process Improvements • Request for more info on the TID dashboard (e.g., Henlopen - LOS and specific intersections) • TID is a good concept and there has been a learning curve; the confidence (predictability, timing, cost) is not there yet and developers are unsure of/not seeing the incentive • What metrics are used to measure "success" of the program? • Look at overall corridor capacity and not just TIDs
	Incentives and Funding • Explore how the state can transfer more infrastructure responsibility to counties and local governments/provide options for local governments to pay • Expand the DDD for neighborhood centers and corridors • Streamline approval processes for redevelopment/projects within growth areas and provide incentives to equalize less expensive development in L4 areas	Incentives and Funding • Explore how the state can transfer more infrastructure responsibility to counties and local governments/provide options for local governments to pay • Bring state, county and muni together to consider how to pay for improvements • Consider a TID funding stream and a statewide funding stream • State funding formula needs to be looked at overall because of downward trend • Streamline approval processes for redevelopment/ projects within growth areas and provide incentives to equalize less expensive development in L4 areas - o Rural impact fees - o Offsite per-unit transportation costs for development in Level 4 or outside of a TID should equal or exceed cost inside of a TID
Planning and Coordination • There is a strong desire to improve direct engagement, data sharing, and coordination between the State and local governments, especially DelDOT	Planning and Coordination • Develop a statewide transportation plan that is consistent with State Strategies and is enforceable • Determine what research is needed to address specific community challenges.	Planning and Coordination • Develop a countywide comprehensive transportation plan that is consistent with State Strategies and is enforceable - o Customized approach for each county as needed - o Give state the right to say No • Consider an MPO • More communication and partnership throughout the process • All state policies need to reinforce the growth areas consistently

Environment

Figure 20. Workshop Comments from Environment Breakout Group

Question 1: What are the barriers and opportunities to more effectively protecting and preserving important ecological resources, open space, and farmland?		
Kent County	New Castle County	Sussex County
Policy and Funding - Greater communication between farmers, developers, the State, county, and other stakeholders - Plan for marsh migration in both agriculture and development areas - Barriers: - Conflicting government agency policies, i.e., solar - Lack of shared vision for climate adaptation and resilience - Development in L4 agricultural areas challenges the viability of the ag industry and creates issues such as obstructing the transport of farm equipment.	Policy and Funding - Public funding for land acquisition and preservation is too limited/formulas outdated: - Revise state open space funding formula; State acquisition is too restrictive - Revise farmland preservation formula to prioritize high-value farmland/econ development - Farmers may prefer five-year preservation commitments over ten-years - Fund more permanent conservation easements - Family land inheritance often leads to subdivision due to tax burdens	Policy and Funding - Need consistent and complementary policies between DDA and DNREC - Consider tax incentives for forestry easements - Increase incentives and funding overall - Evaluate farmland preservation program to ensure preservation incentives are equal to those to development - Proactive outreach to remaining farms - Research question: Is farming still profitable - Data: Accurate baseline of what's been preserved
Regulations - Require new roads and infrastructure to account for farmers and their equipment - Increase density allowances to reduce sprawl - Use open space as buffers to critical resources - Counties could play a greater role in converting open space into parks - Review regulations that allow in-season crops to be imported from out of state - The incorporation of climate change (SB 237, HB 99) into the Comprehensive Plan process	Regulations - Provide more authority to protect state-designated endangered species - Utilities that are exempt from regulation can disrupt preservation efforts - Update ordinances to enhance preservation - Update mapping of wetlands to identify areas for potential protection - Strengthen incentives for land preservation, including TDRs (transfer of development rights)	Regulations and Incentives - TDRs (transfer of development rights) - Regulations favor development over preservation; do not have to show environmental costs in development - Incentives for privately owned preservation, increasing density, and avoiding wetlands - Support eco-tourism - Balance: tourism vs protection of bays
Public Education Public education on preservation, environmental issues, and agricultural heritage; Transfer of Development Rights	Public Education - Increase public awareness (including public officials) and understanding of the ecological value of resources and their role in mitigating climate change - Support effective, well-funded local nonprofits focused on conservation easements	Public Education - Increase public awareness (including public officials) and understanding of the importance of tax ditches, ag preservation, and wetlands, and buffers; - Education on what density really looks like/means

Question 2: How should state capital resources be invested in areas with increased risk of damage from more intense storms, flooding, sea level rise, and other hazards?

Regulatory - Update infrastructure and stormwater and sediment regulations to factor in climate change - Update and maintain stormwater and drainage systems, including tax ditches - Incentives to incorporate buffers in critical areas - Require forecasted conditions to be incorporated into capital planning - Apply 100-yr floodplain standards in the 500-yr floodplain and consider off-limits to development - Maintain existing preservation efforts/current Kent County policies	Statewide Vision - Develop a statewide plan for environmental goals, including strategic retreat and land acquisition - Promote green roofs, natural buffers, and resilient construction in high-risk zones - Fund updates to zoning codes and incentivize floodplain protection	State and Federal funding - Build out a state resiliency fund for climate-related projects - Incorporate increases for environmental taxes to use towards mitigating climate risks - Decrease reliance on federal funding and FEMA and explore state-level opportunities to increase funds for climate resiliency - Explore untapped federal grant opportunities
Other - Update mapping and data - Provide cost analysis comparing evacuation vs. infrastructure adaptation - Increase communication between counties, understanding Sussex's challenges - Utilize ditches - Ensure that when there is a disaster in levels 1 or 2 that there is still operable infrastructure	Flood Management Invest in stormwater infrastructure and marsh migration strategies	Proactive, long-term planning to face climate change and flooding - Support of low income, at-risk communities - Plan for and invest in planned retreat - Long-term plan for dredging and beach replenishment - Explore a collaborative approach to cost sharing for beach replenishment and dredging; towns cannot be increasingly responsible - Reconsider level 1 designations for areas inside the 100-year floodplain - Ensure the state follows the rule of not building in floodplains
Education Educate people on the risks and concerns of climate change and impact	Education and Collaboration Build awareness about the value of preservation and enhance coordination among all levels of government	Homebuyer and Community Awareness - Mandate real estate disclosures of flood zones and sea level rise to prospective homeowners - Community and new homebuyer awareness of location risks and understanding of coastal area living, tides, septic maintenance, plantings, tax ditches - Create awareness and prioritize environmental concerns

Economic Development

Figure 21. Workshop Comments from Economic Development Breakout Group

Question 1: What land and infrastructure assets should be preserved and enhanced to support the needs of current and emerging businesses and industries? How might the State best incentivize this?		
Kent County	New Castle County	Sussex County
Infrastructure Needs • Upgrade broadband infrastructure/look at fiber lines • Create a utility update fund (electric and water) as a state incentive • Create more transit routes near workforce housing and as an effort for public safety • Incentivize more electric generation in DE • Incentives for residents to tap into natural gas lines • East-West truck route	Infrastructure Needs • Expand access to public transportation and normalize it • Expand rail networks to include downstate and expand freight rail	Infrastructure Needs • Site readiness fund - infrastructure assets • Sewer: Need funding from the state to expand/upgrade sewer systems • Transit - expansion of DART (focus on southern part of state, lower income areas, and connectivity that supports commerce); more pilot programs • Additional sources of electricity to bring prices down; nuclear plant in DE • High speed internet/5G and cell service (to attract workers) • Explore east-west corridors
Land for Industry • Preserve existing industrial lands and reserve land along the rail lines and near airports in growth zones for industrial parks • Protecting businesses with wetland buffers	Improve the attractiveness of urban living • Develop a city high school in Wilmington • Develop urban amenities • Tax incentives for employees of a city to live in a city and for businesses to locate there	Agriculture, Tourism, and Industrial • Diversify and strengthen farming with greenhouses, other revenue streams, ag/ecotourism; • Support speed to market • Continue funding Agland Preservation and supporting young farmers • Plan and funding for maintaining open waterways for recreation (dredging) and beach replenishment • Preserve existing industrial lands and reserve land along the rail lines and around airport
Agricultural vitality • Continue funding Agland Preservation and supporting young farmers • Protect farmers from solar power; promote solar on Ag structures not Ag land • Support ways for farmers to diversify their funds and industry	Development Incentives • Expand the DDD and develop a rebate program (similar to DDD) for neighborhood centers • Tax incentives for develop/rehabilitate in low-income neighborhoods, without displacing people • Fast-track zoning for businesses in low-income neighborhoods	
Other • Support the Dover Air Force Base on a potential runway for private planes, including access to Port Mahon for good access to fuel • Funnel funds directly to a municipality	Other • Protect and preserve our state parks • Help consumers understand that online shopping drives the demand for undesirable logistics warehouses	Other • Work with counties to identify key future industries. Aviation? Biotech, emerging sciences • Interest-free loans to businesses • Streamline agency processes

Question 2: What investments are needed to attract and retain a workforce that both serves the needs of an aging population and fuels a competitive economy?

Economic Growth & Workforce Development - Invest in training and trade schools (high school and post-secondary) for needed occupations (nurses and specialist doctors) - Establish arts and cultural experiences to attract people - Invest in support systems for workers: affordable housing; childcare (universal); living wages - Create co-working spaces (WeWork-like spaces) - Invest in education and continuing education opportunities	Economic Growth & Workforce Development - Recruit young professionals, including out-of-state talent - Incentivize remote workforce opportunities - Develop amenities and attractions to increase Delaware's livability and attract large employers - Improve public salaries - Assist farmers with succession planning - Leverage colleges and universities to attract young talent, including out-of-state - Maintain a collegiate presence in Wilmington - Invest in raising public school outcomes and establish mentorship programs	Economic Growth & Workforce Development - Provide incentives such as student loan forgiveness for relocating and remaining in DE - Improve salaries - Medical school - Need more vets for farm animals- provide incentives to come/stay - Culinary school and hospitality industry - Greater higher education presence (UD/DeITech/SEED)
	Affordable Housing & Transportation - Use site readiness funds to create multi-use, walkable communities along key corridors - Address workforce housing challenges, focusing on affordability and proximity to employment - Provide tax incentives for young professionals purchasing homes - Pair redevelopment projects with workforce development initiatives	Affordable Housing & Transportation/Transit Needs - Incentives/subsidies so people can live where they work - Workforce housing assistance for builders - Partner with industry to support employee transportation, housing subsidies, - Zone for tiny houses, mixed-use/cluster development; rethink mobile homes - Increase the supply of housing close to employment to reduce commute time
	Data-Driven Strategies - Invest in data on future trends in transportation and housing, including housing biases - Combat biases regarding affordable housing's impact on property values with data and education	Other - Job assistance for spouses who relocate - Higher pay for needed skills - High state fees or taxes for those moving here to put into different funding areas: incentives, support for Invest in data on future trends in transportation and housing, including housing biases

Housing

Figure 22. Workshop Comments from Housing Breakout Group

Question 1: How can the State work with local governments to facilitate the development of diverse housing that meets residents' affordability needs? Question 2. What are the barriers to and opportunities for increasing mixed residential development in SSPS levels 1 through 3?		
Kent County	New Castle County	Sussex County
Zoning Reform - Provide a menu of strategies to address affordable housing to local governments and provide incentives to implement a baseline number - Allow for Accessory Dwelling Units, inclusionary zoning - Review open space requirements and consider a fee-in-lieu option State Standard for density - Eliminate public hearing requirements for by-right uses, while still informing the community	Zoning Reform - Incentivize inclusionary zoning and diverse housing types - Require affordable housing as part of rezonings, conditional uses and/or certain types of districts/developments - Instead of model ordinances, develop a model/standard process to streamline approvals of ADUs, mixed used, etc. - Align regional zoning policies across municipalities and counties - Rezone vacant buildings for multifamily or mixed-use development to incentivize affordable housing	Zoning Reform - Create a menu of options for municipalities to consider - Rethink mobile homes and tiny houses - Help municipalities to update their ordinances - Mandate/Incentivize inclusionary zoning and diverse housing types; allow increased height - Require affordable housing as part of rezonings, conditional uses and/or certain types of districts/developments - Ensure affordable housing is not being built in high risk areas, including floodplains and are of high quality construction
Incentives - Incentivize rehabilitation of older housing and redevelopment - Look at taxes as they relate to housing and redevelopment - Waive permit fees and impact fees/provide expedited permitting for affordable units - Provide financial support for local impact studies that calibrate fees to local needs. - Look at use of the Real Estate Transfer tax. Is it a barrier? Should it support infrastructure and affordable housing? - Does building more supply make a difference when the people keep coming from out of state? Will there ever be enough supply?	Incentives - Provide tax credits, density/height bonuses, and expedited review processes (Jobs Now) with a collaborative approach between County, State and Federal (where applicable) - Use public-private partnerships to redevelop vacant buildings and surplus government buildings into affordable housing - Incentivize inclusionary zoning and integrate subsidies for developers - Provide a more predictable approval process with maximum review times for state agencies - Create a rent-to-own program - Adopt a statewide building code - Explore Transfer of Development Rights (TDRs) and expand the DDD	Incentives - Expedite and streamline affordable housing projects, along with the supporting roads and infrastructure - Expand the DDD - Support the infrastructure for affordable housing projects (state does, county could help) - Review rental laws to balance landlord protections - Provide financial incentives to municipalities that score high on a menu of affordable housing strategies - Financial incentives need to come from the state - Incentives to provide seasonal housing, instead of a short term rental - Use public-private partnerships - Be creative, participate in more pilot projects (Dutchmans Harvest) - Create a site readiness fund to help developers offset upfront costs, impact fees, off-site and entrance costs, etc. and concentrate the fund in level 1 through 3. The fund could be

		created with part of the Accommodation Tax. Statewide Land Bank/TDR bank
State Strategies/PLUS - Shorten or alleviate PLUS for development in the growth areas. Put more teeth in the PLUS and State Strategies - More circuit riders to help write codes and provide examples of model ordinances - Give DeDOT the ability to say no to providing roads in areas where they aren't planned for. - Provide a state density standard for development levels and for affordable housing	State Strategies/PLUS - Expand SSPS Levels 1–3 with affordable housing options - Create statewide policies to enforce affordable housing measures, such as building quotas or mandatory inclusionary zoning - Enable greater enforcement of the Statewide Strategies and add more detail (i.e., rather than just levels 1-4, certain areas are downtown mixed-use, etc.) - Provide guidance for how local comp plans should address affordable housing and add a minimum requirement for State approval	State Strategies/PLUS - Enable greater enforcement of the Statewide Strategies - Enforce proactive rezonings - Provide guidance for how local comp plans should address affordable housing and add a minimum requirement for State approval - Make sure PLUS process seems meaningful - saying No on occasion gives it more credibility
Public Education Public education on “affordable” housing, benefits of multigenerational communities	Public Education - Educate decision-makers on housing needs and clarify affordability definitions - Combat stigma around affordable housing through public campaigns, highlighting workforce housing	Public Education Educate decision-makers and the public on housing needs and clarify affordable housing types, relationship to services and needs
Intergovernmental Coordination - Coordinate and require sharing of current land use and ownership information between government agencies - Have a shared system for communicating about developments - Coordinate redevelopment opportunities between municipalities, particularly a shared vacant building registry. Opportunity for affordable housing or people displaced from natural disasters	Funding - Encourage local housing trust funds and leverage federal funding (e.g., HUD's Choice Neighborhoods program) - Integrate public-private funding for developments - Address funding gaps in city redevelopment programs	
Other - More useful to drive development into municipalities/municipal infrastructure through annexation - Foster collaboration between architects, landscape architects, planners and engineers for innovative designs		