



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

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)**



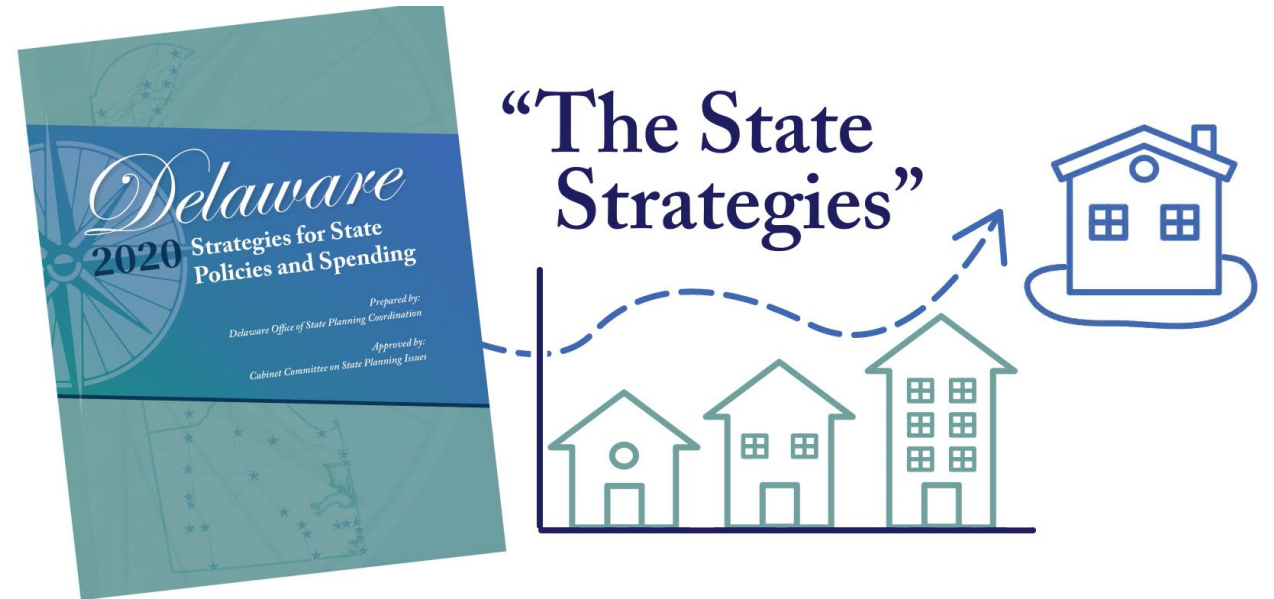
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Data Analysis Workgroup

State Perspective Presentation

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

II. Data-backed insights

III. Further into the data





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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 OF DELAWARE
CABINET COMMITTEE ON STATE PLANNING ISSUES

Data Analysis Workgroup

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?

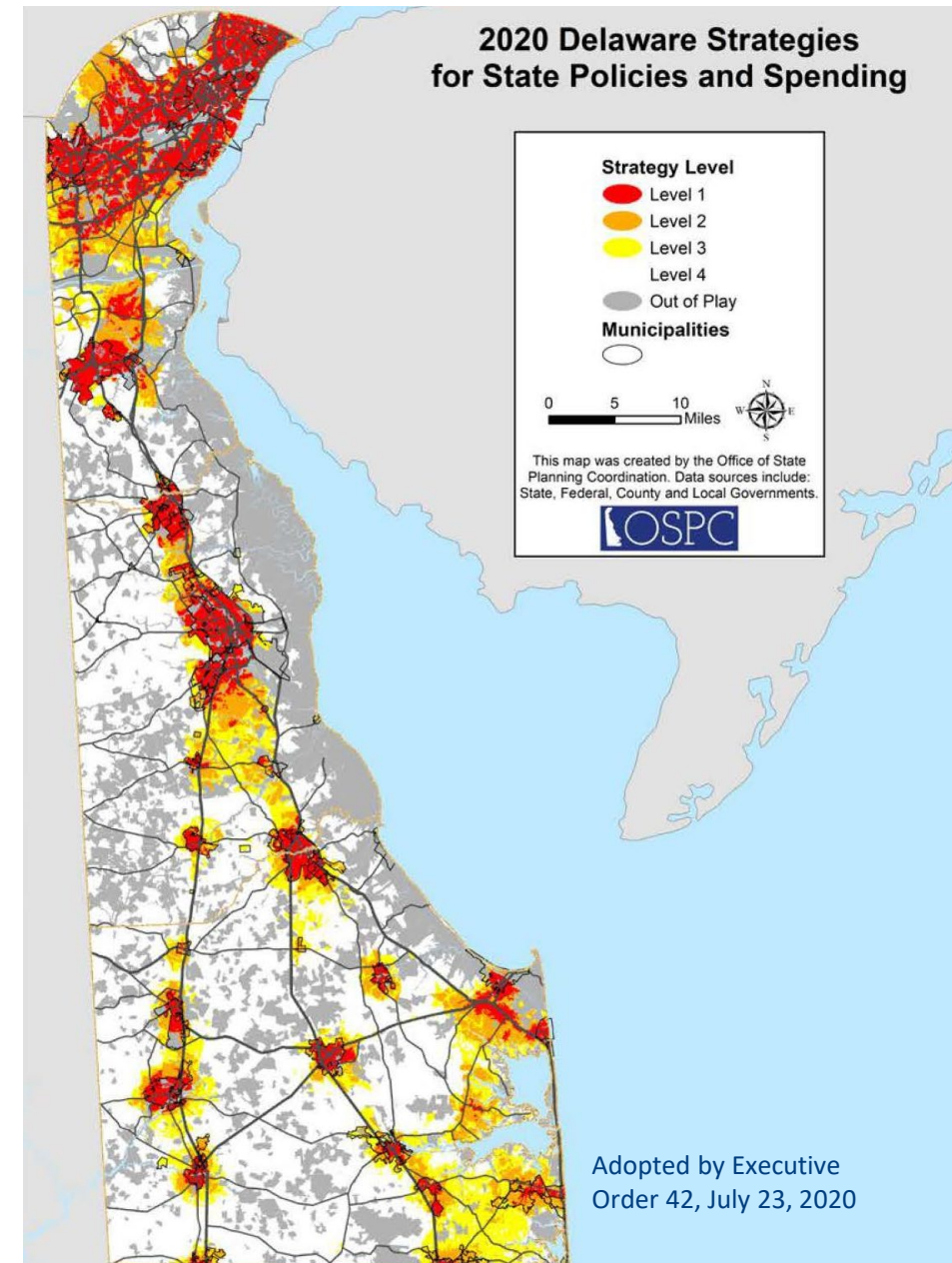
- **Required by Delaware Code*:**

... 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)



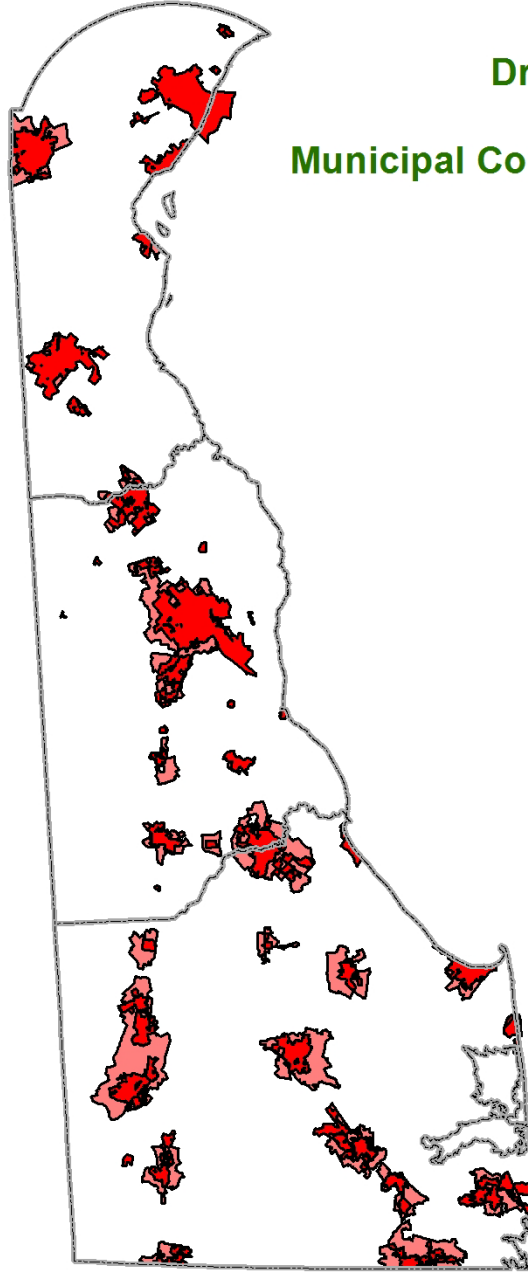
Data used to make maps include:

- 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



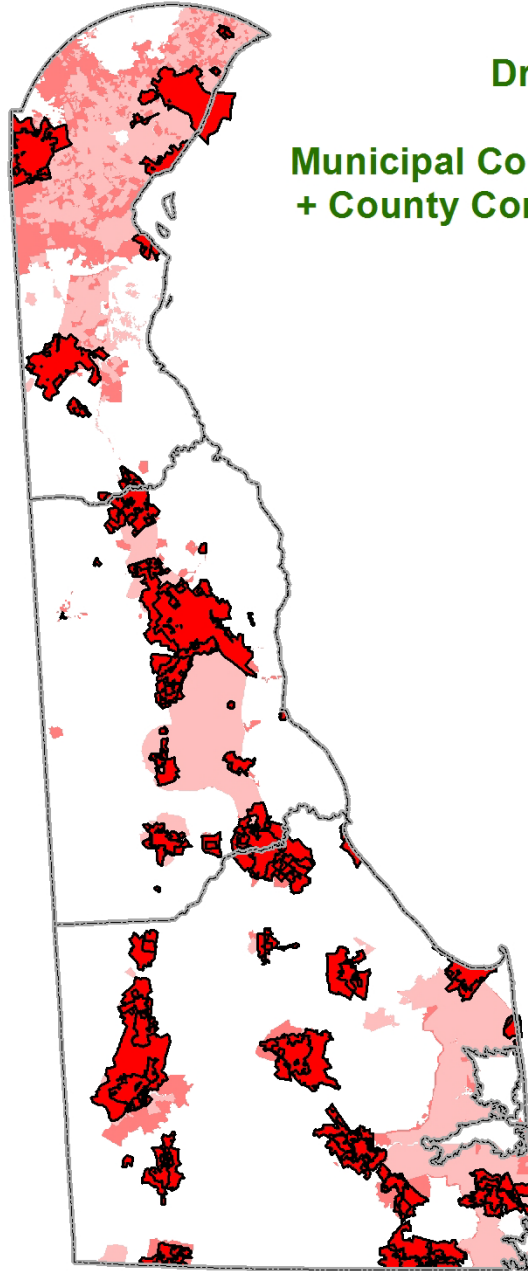
Draft 2015

Municipal Comprehensive Plans

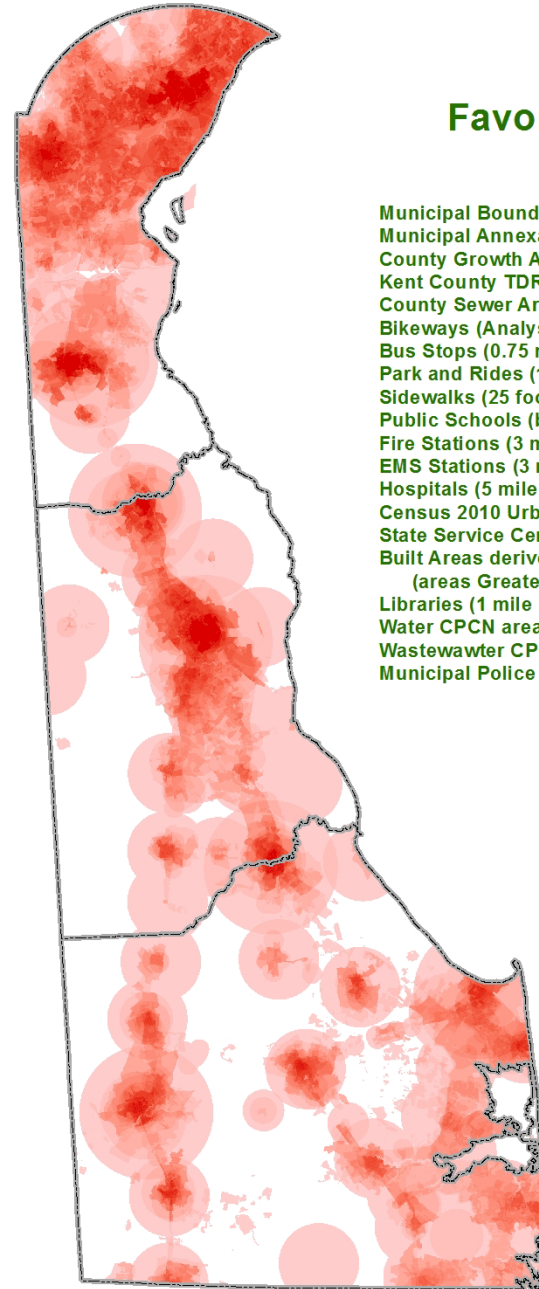


Draft 2015

**Municipal Comprehensive Plans
+ County Comprehensive Plans**



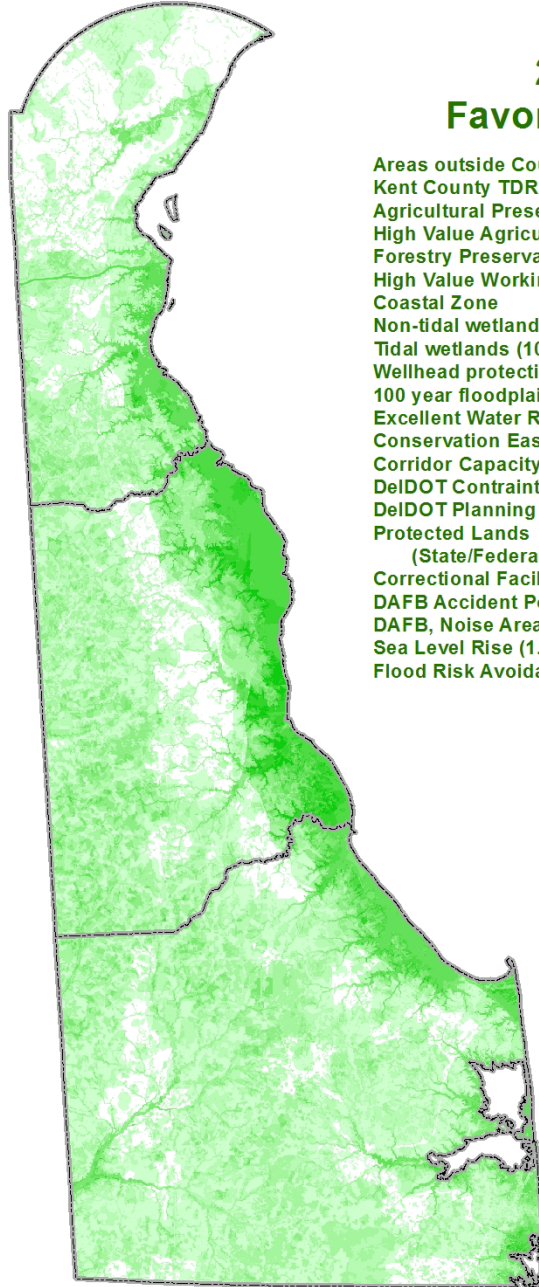
2015 DRAFT Favoring Development



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

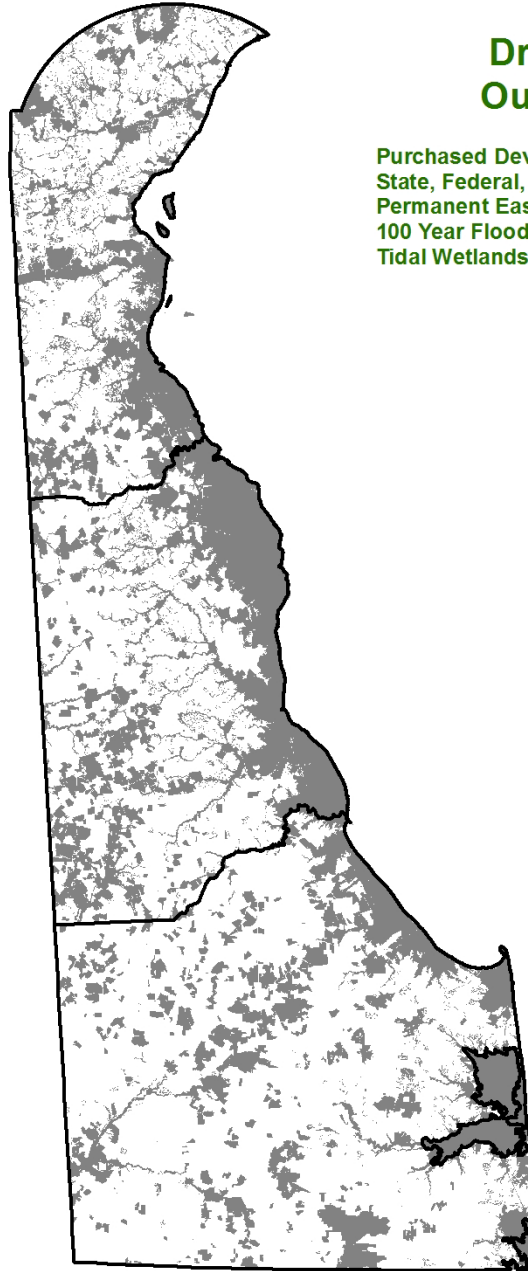
2015 DRAFT Favoring Preservation

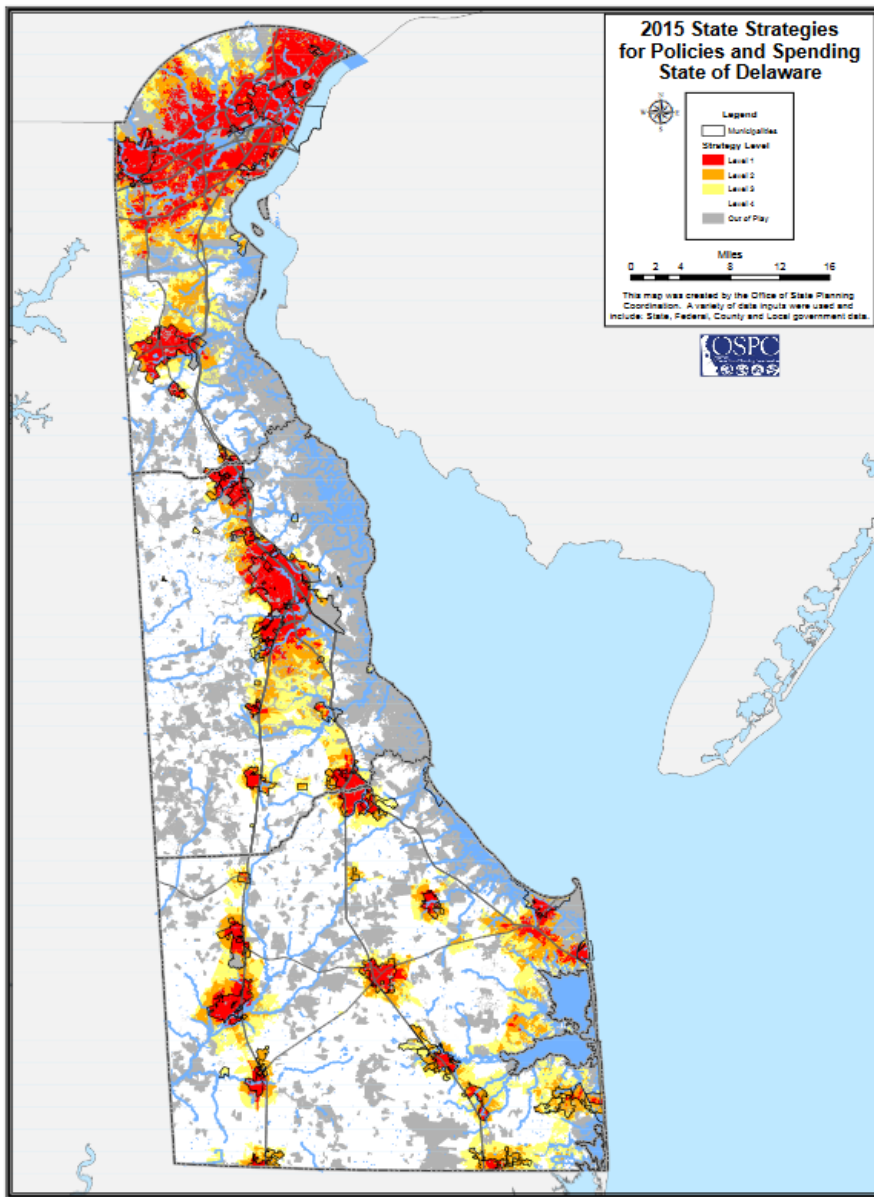
Areas outside County Growth areas
Kent County TDR sending areas
Agricultural Preservation Districts
High Value Agricultural Lands
Forestry Preservation areas
High Value Working Forest Lands
Coastal Zone
Non-tidal wetlands (100 foot buffer)
Tidal wetlands (100 foot buffer)
Wellhead protection areas
100 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)



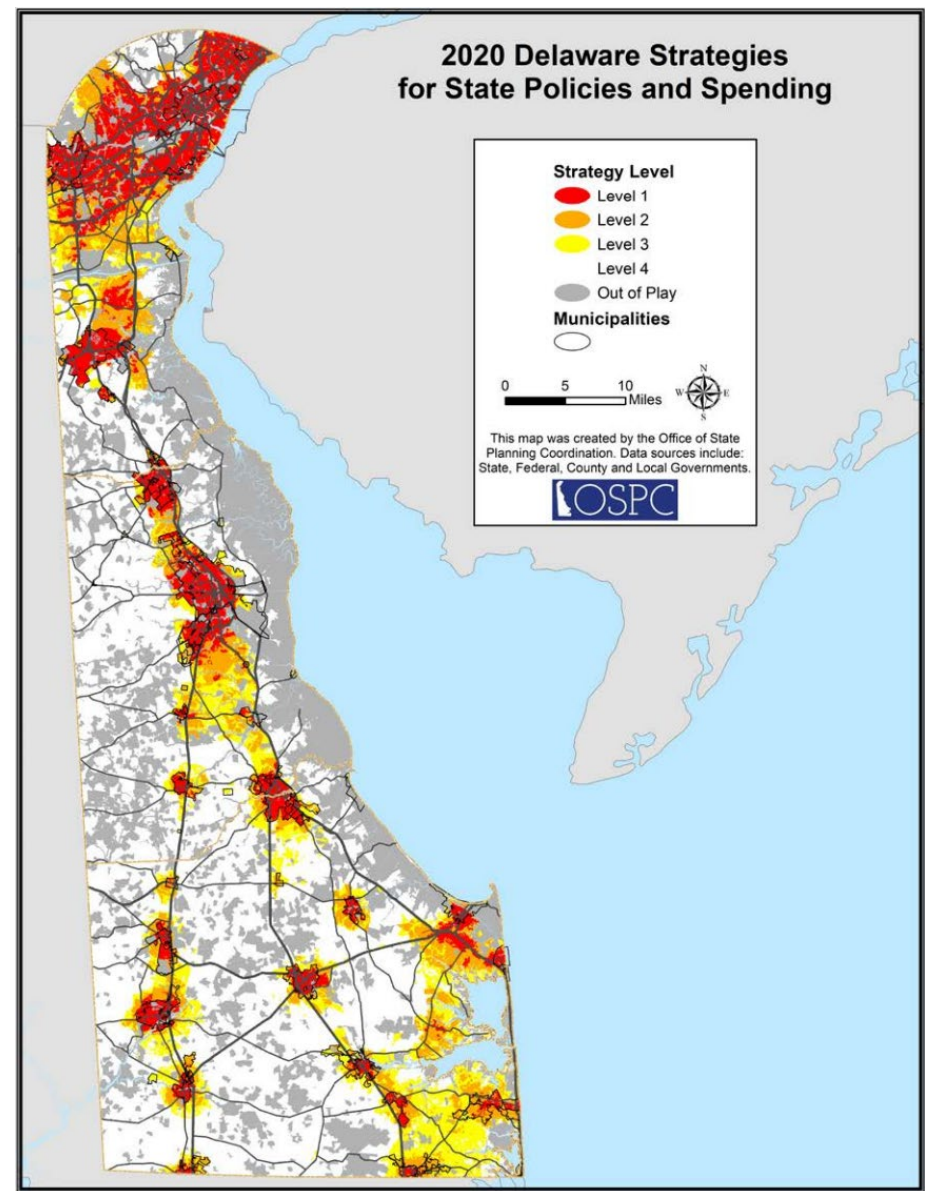
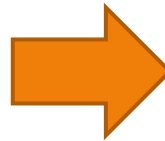
Draft 2015 Out of Play

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





2015 Strategies



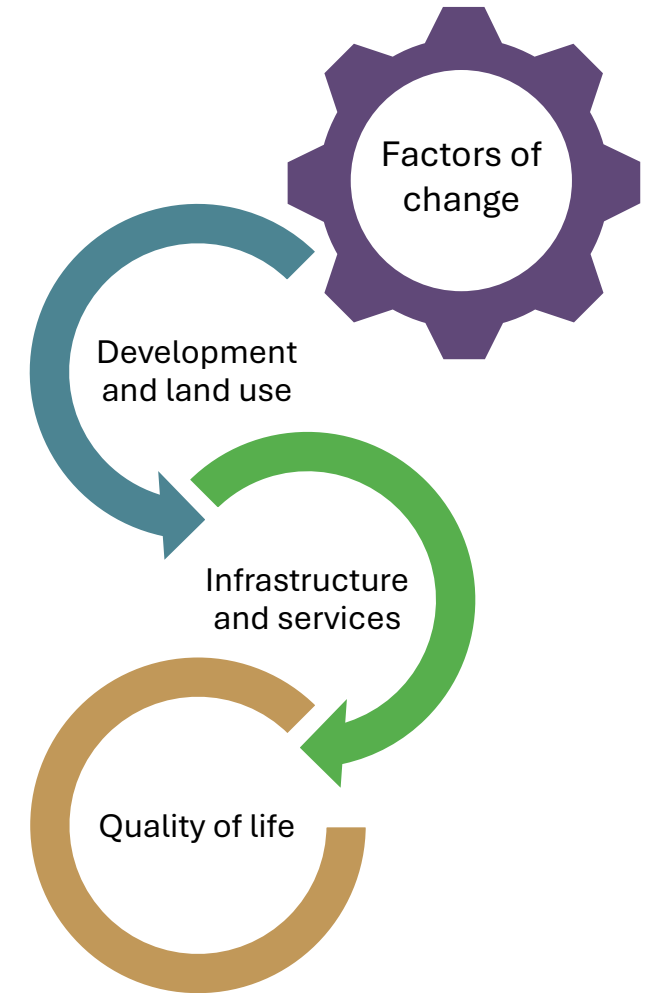
2020 Strategies



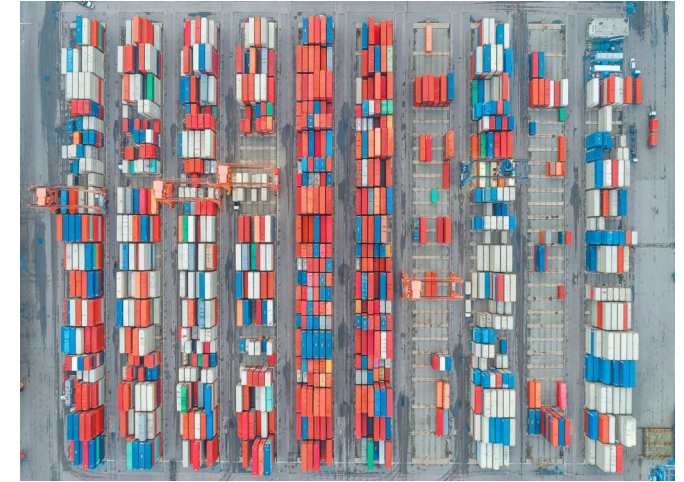
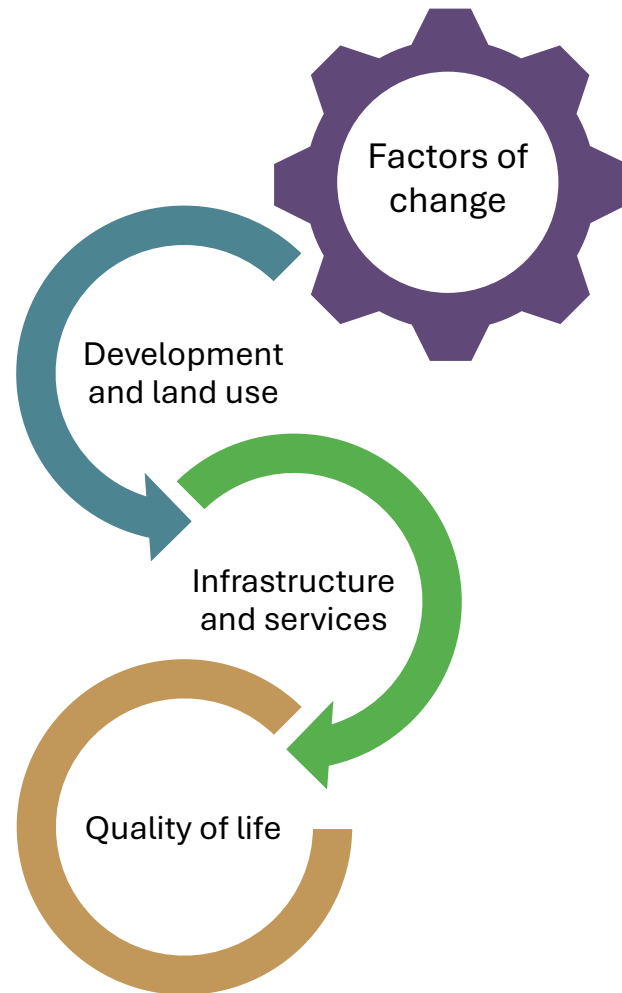
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II. Data-Backed Insights

External factors and their effects on Delaware communities



External Factors



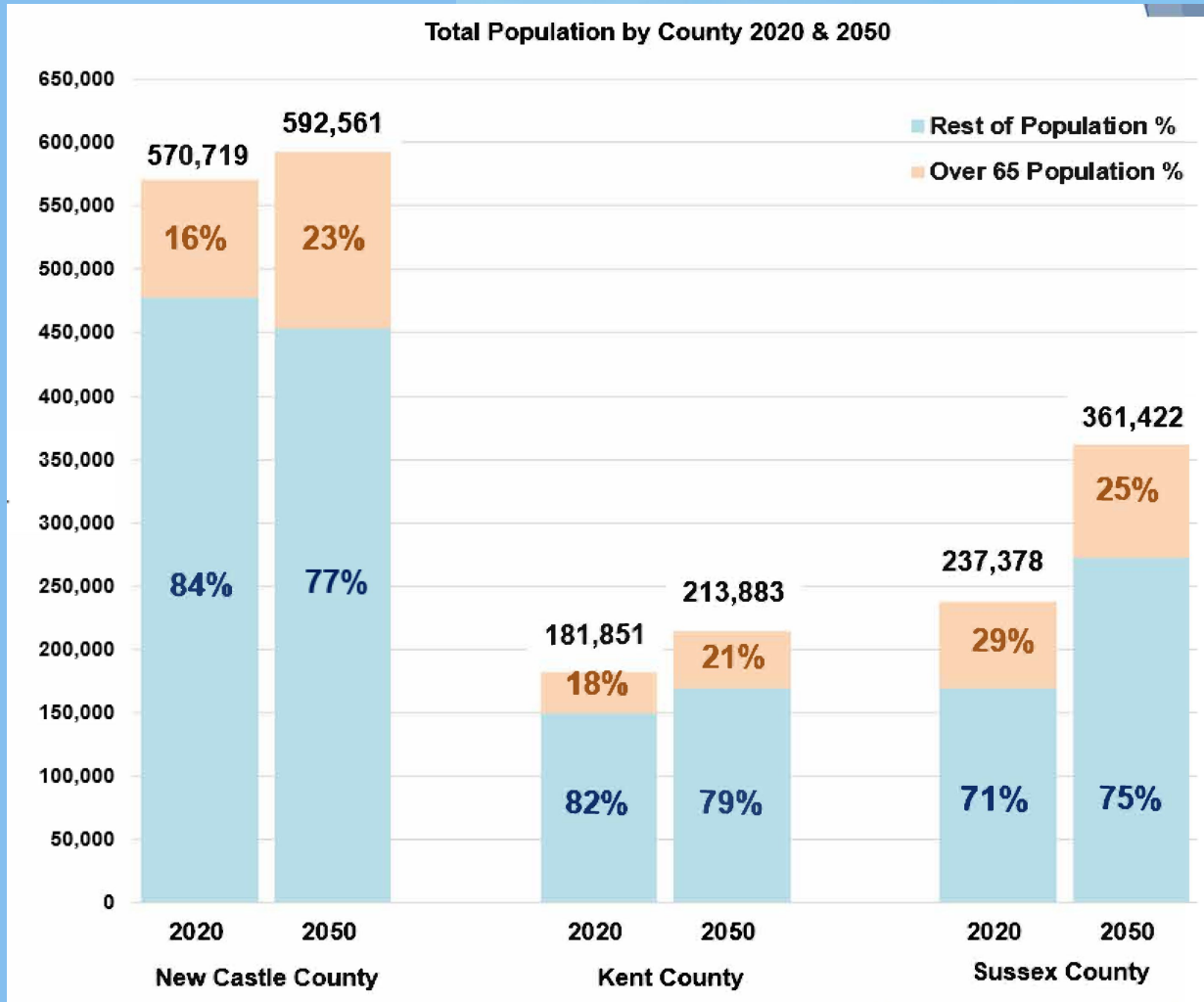
Factors Affecting Delaware



- **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.



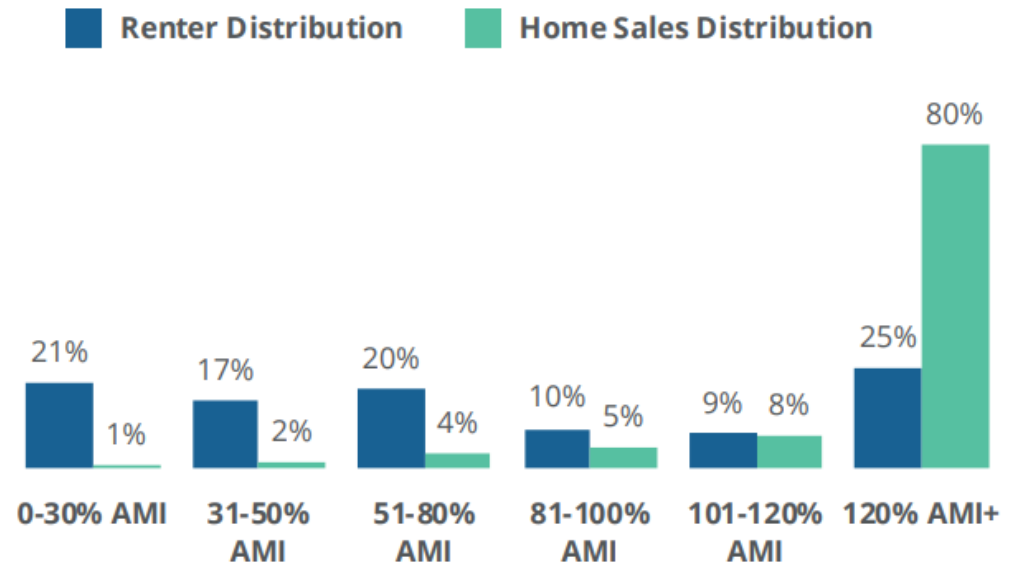
Data Insight: Demographics are Changing

- 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

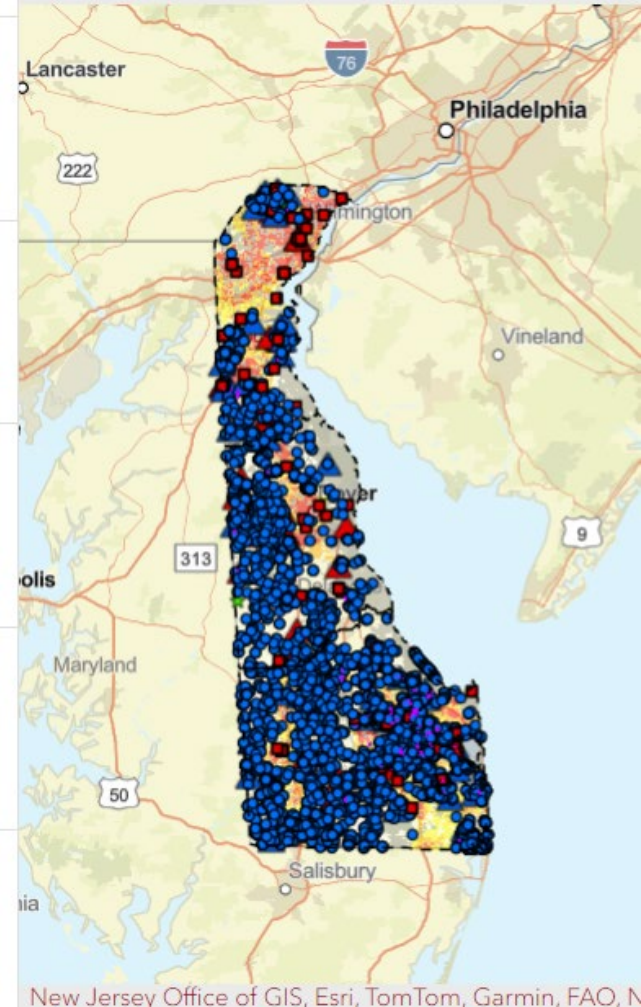
Total Units - Level 4

Non-residential PLUS Projects

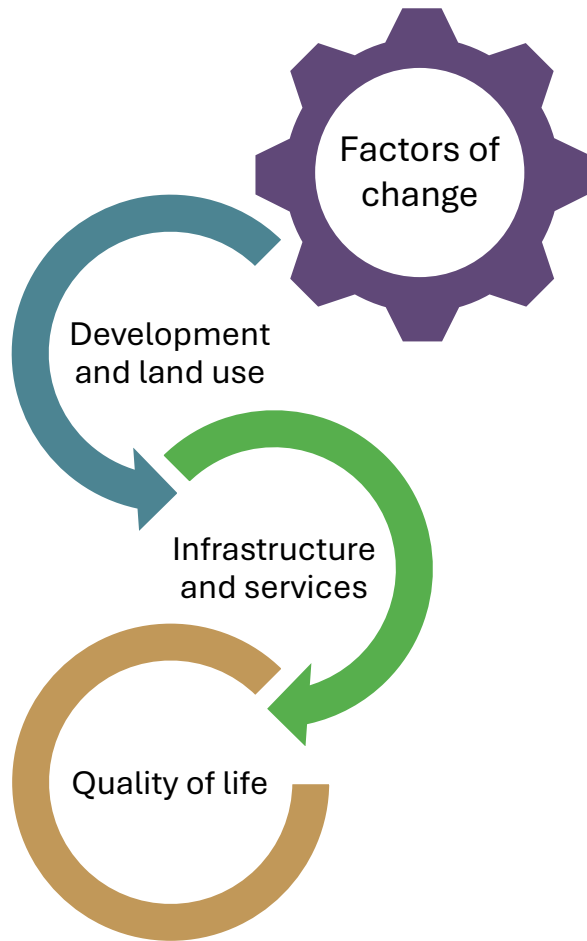
1,726,328

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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III. Further Into the Data

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

Transportation

Environment

Economy

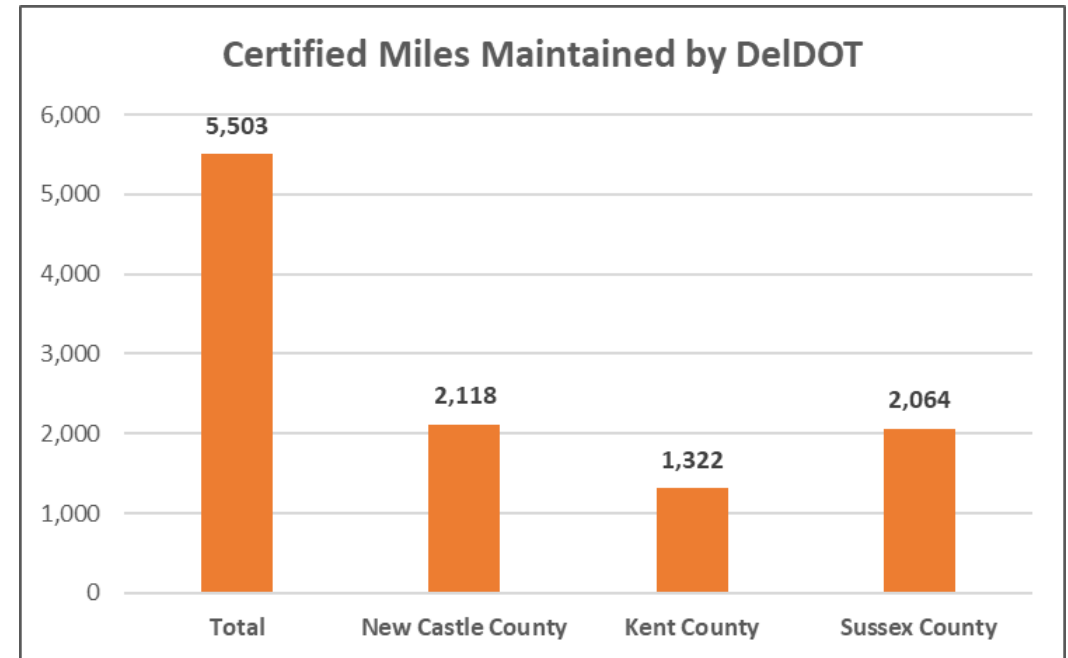
Housing

Transportation

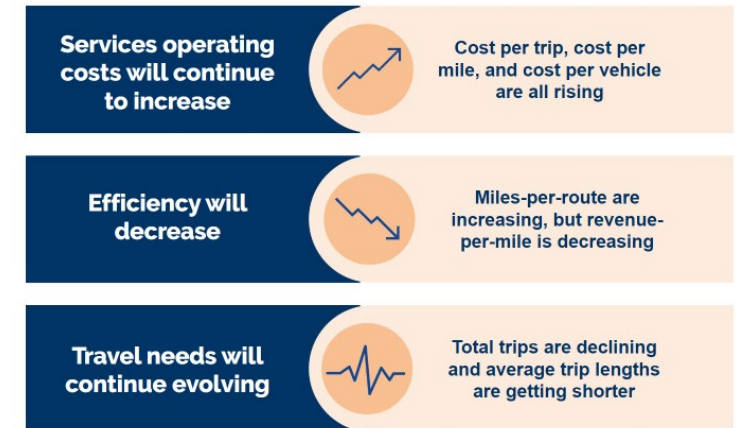
Delaware DOT manages 89%
(national average of state-maintained roads: 20%)

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)

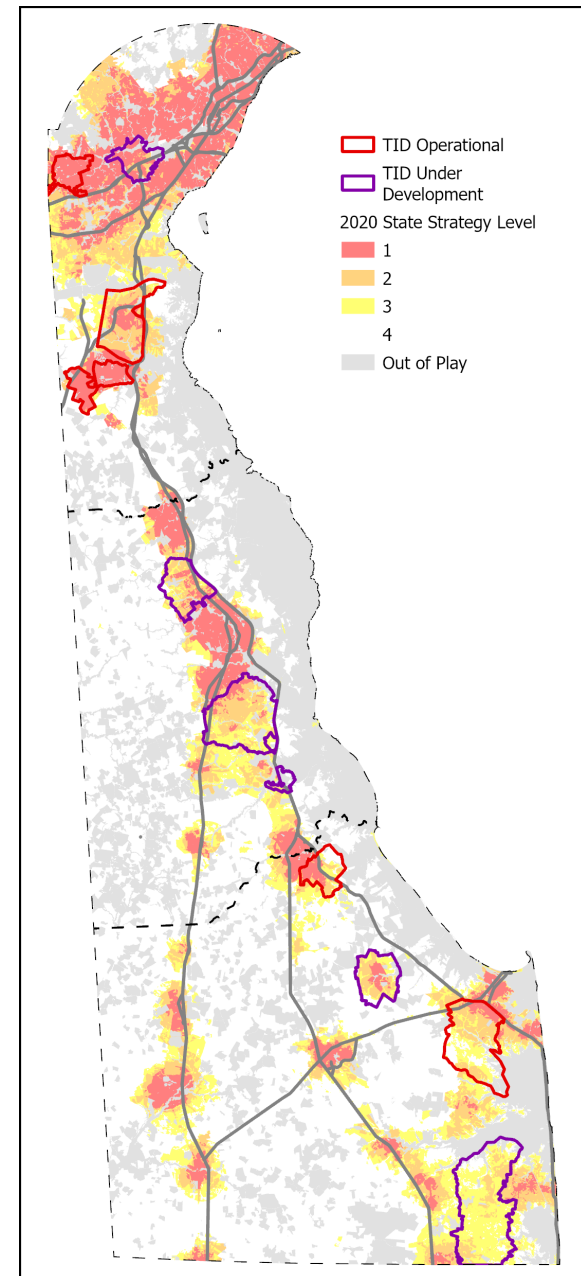
TID Operational

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

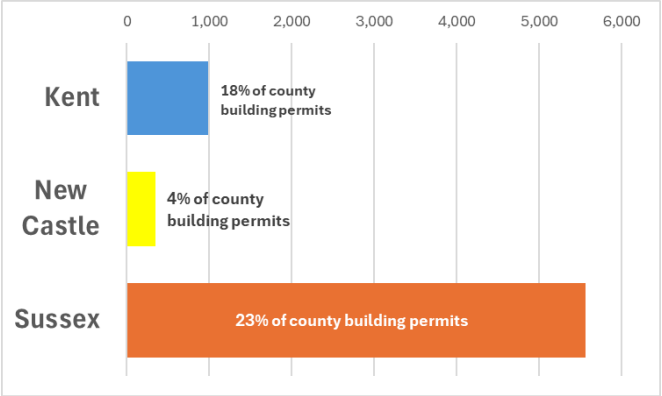
TID Under Development

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

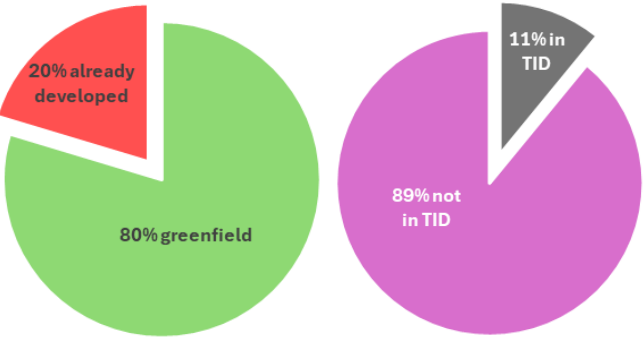
Municipalities



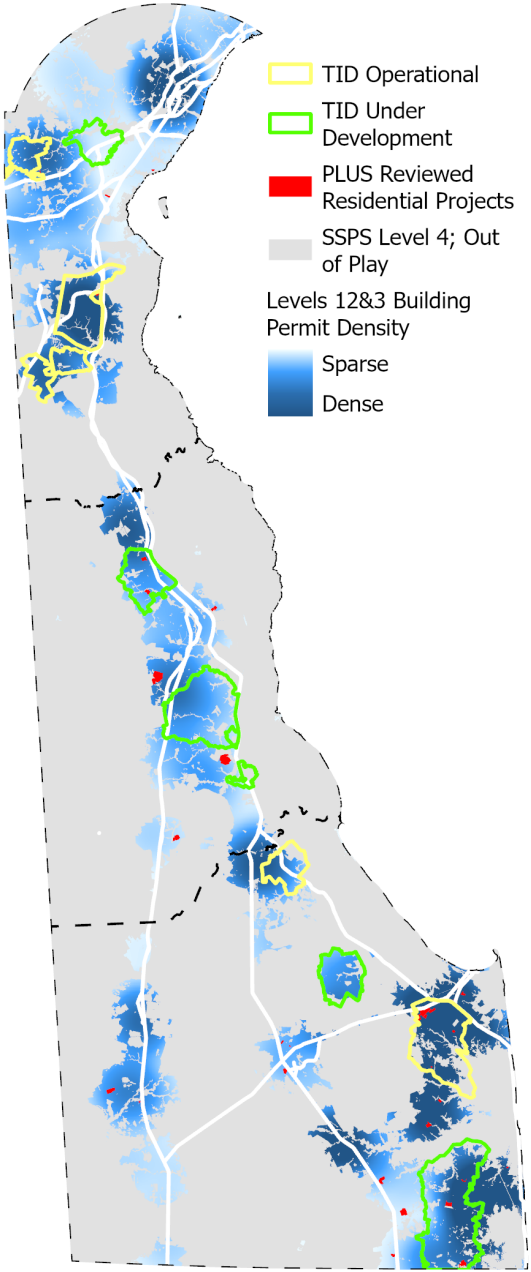
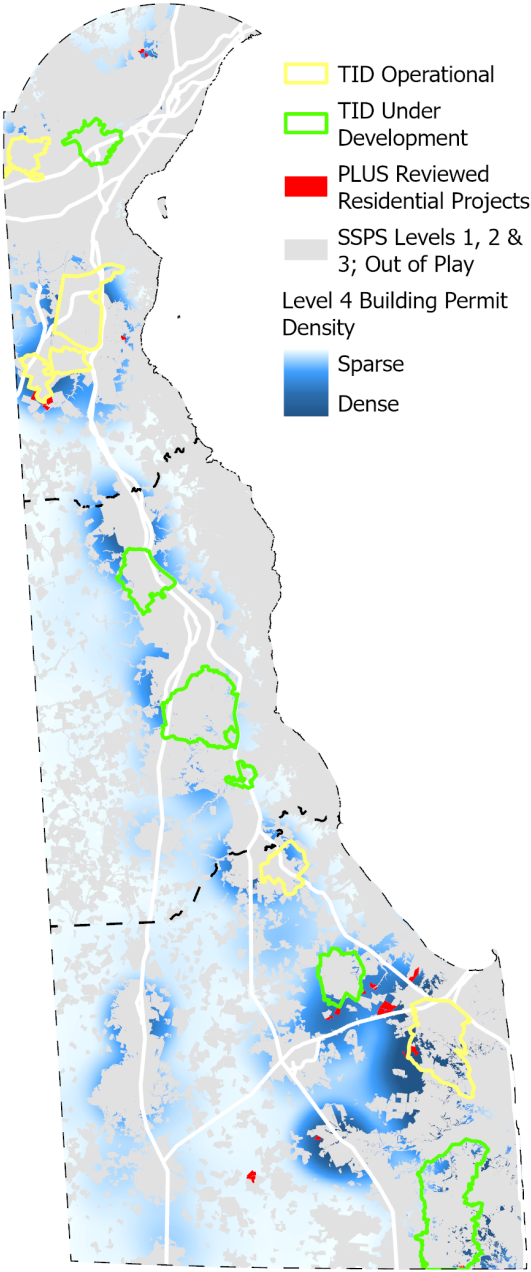
Development Trends in
Strategy Level 4



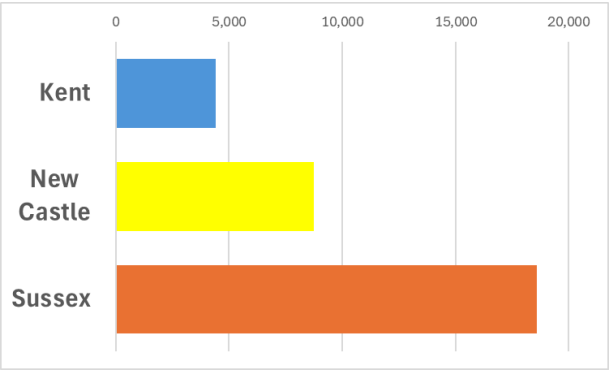
Building Permits Level 4:
6,886 residential units (18%)
765,659 non-residential sqft (3%)



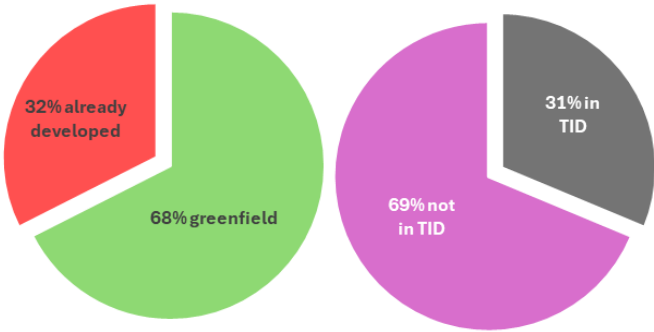
Reviewed PLUS Dev't Level 4:
8,685 residential units (46%)
814,100 non-residential sqft (13%)



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%)



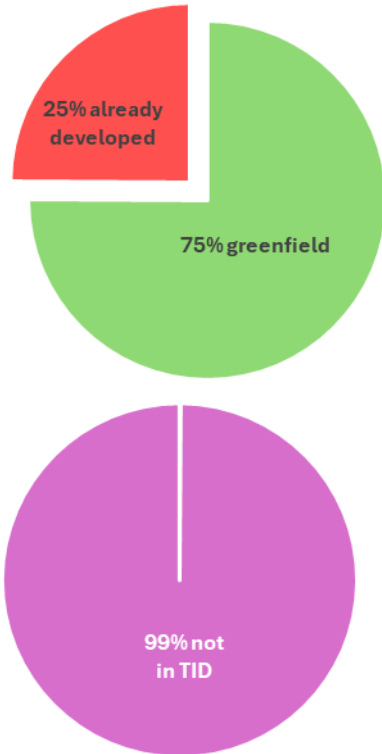
Reviewed PLUS Dev't Level 1,2&3:
10,353 residential units (54%)
5.4M non-residential sqft (87%)

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

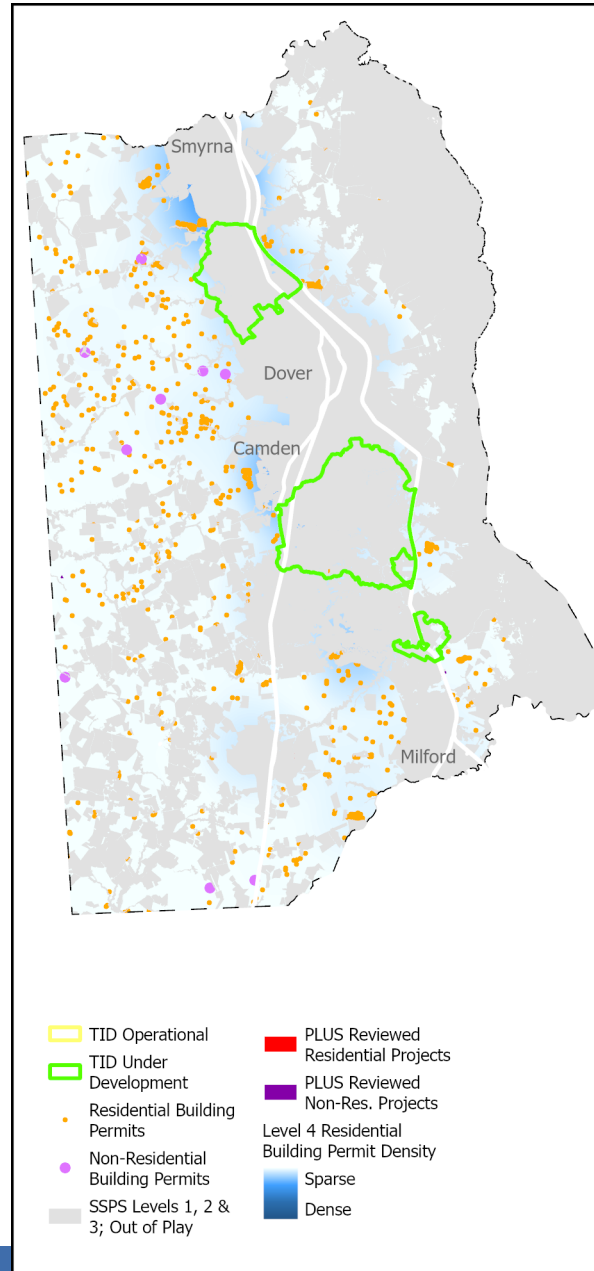
KENT COUNTY

Development Trends in Strategy Level 4

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

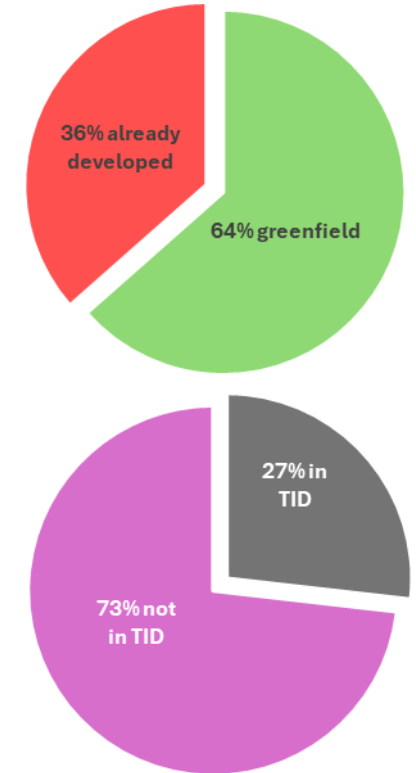


Reviewed Plus Dev't Level 4:
0 residential units (0%)
78,575 non-residential sqft (21%)

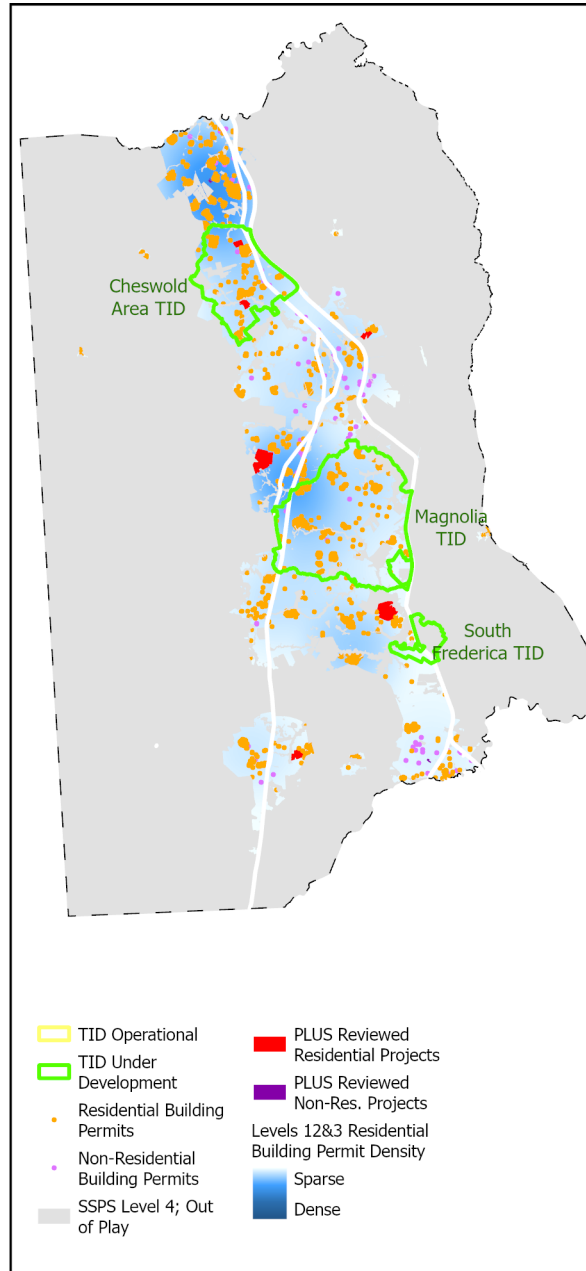


Development Trends in Strategy Levels 1, 2 and 3

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%)



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

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

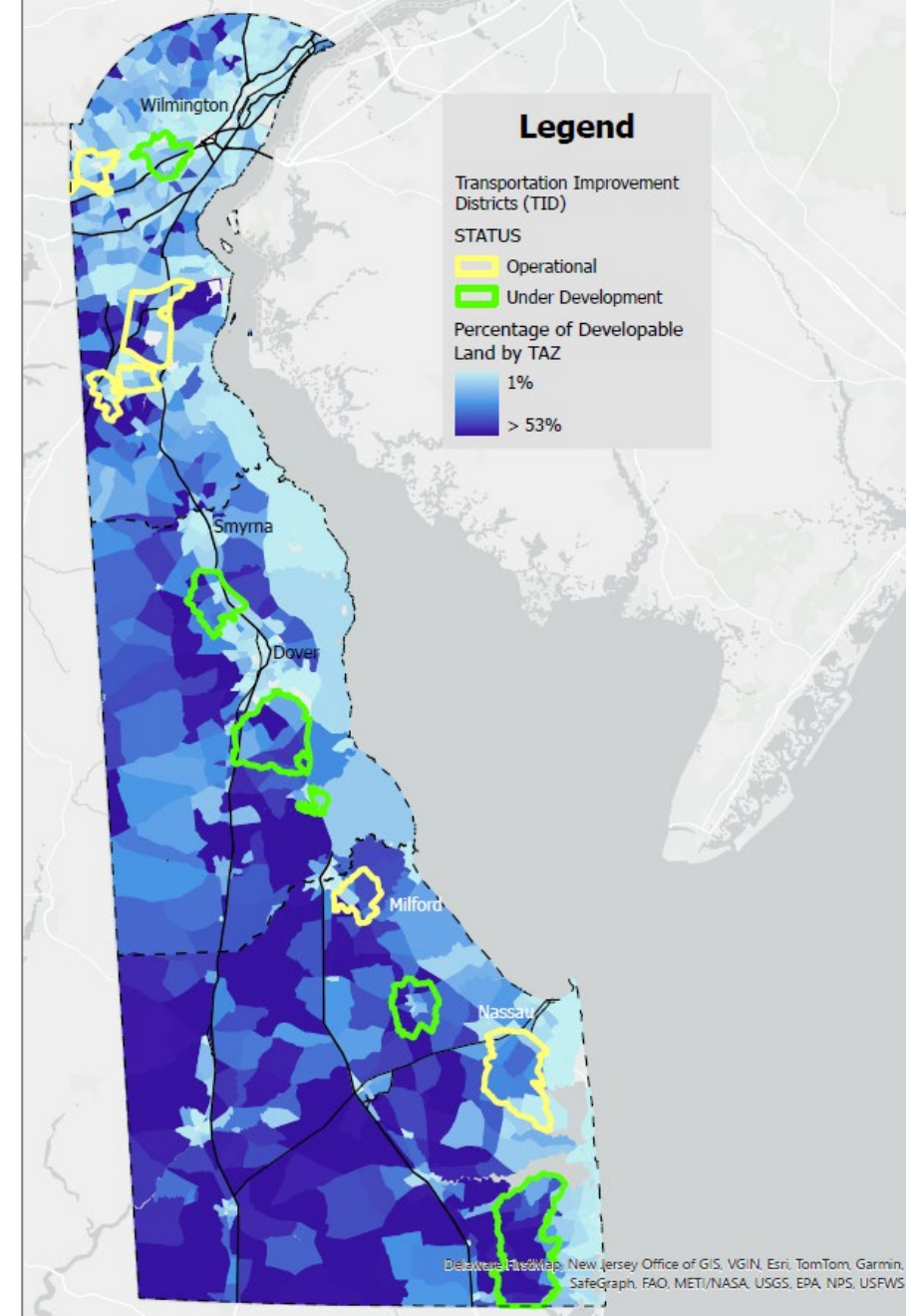
Total Land Area

—

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)

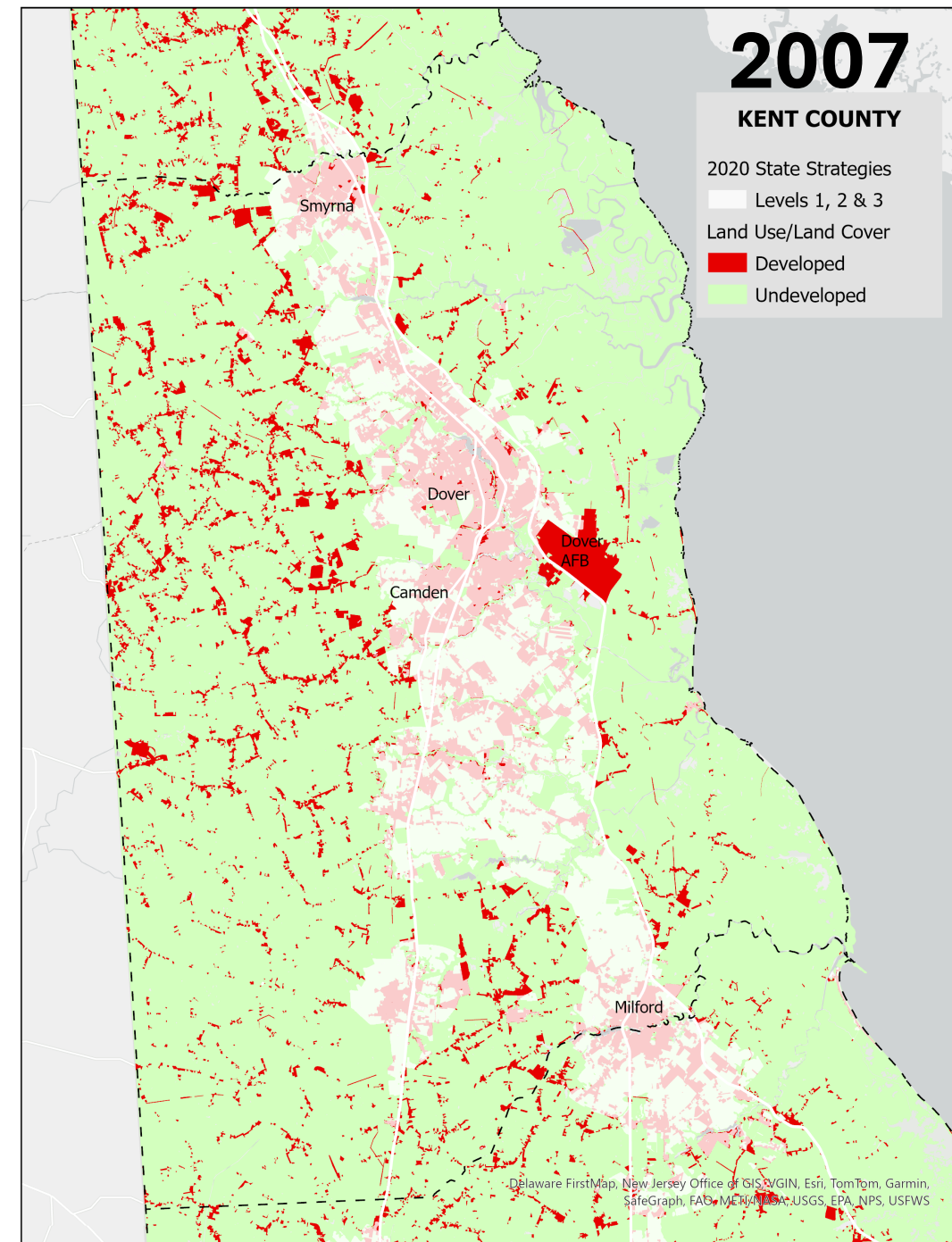
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Developable Land Area



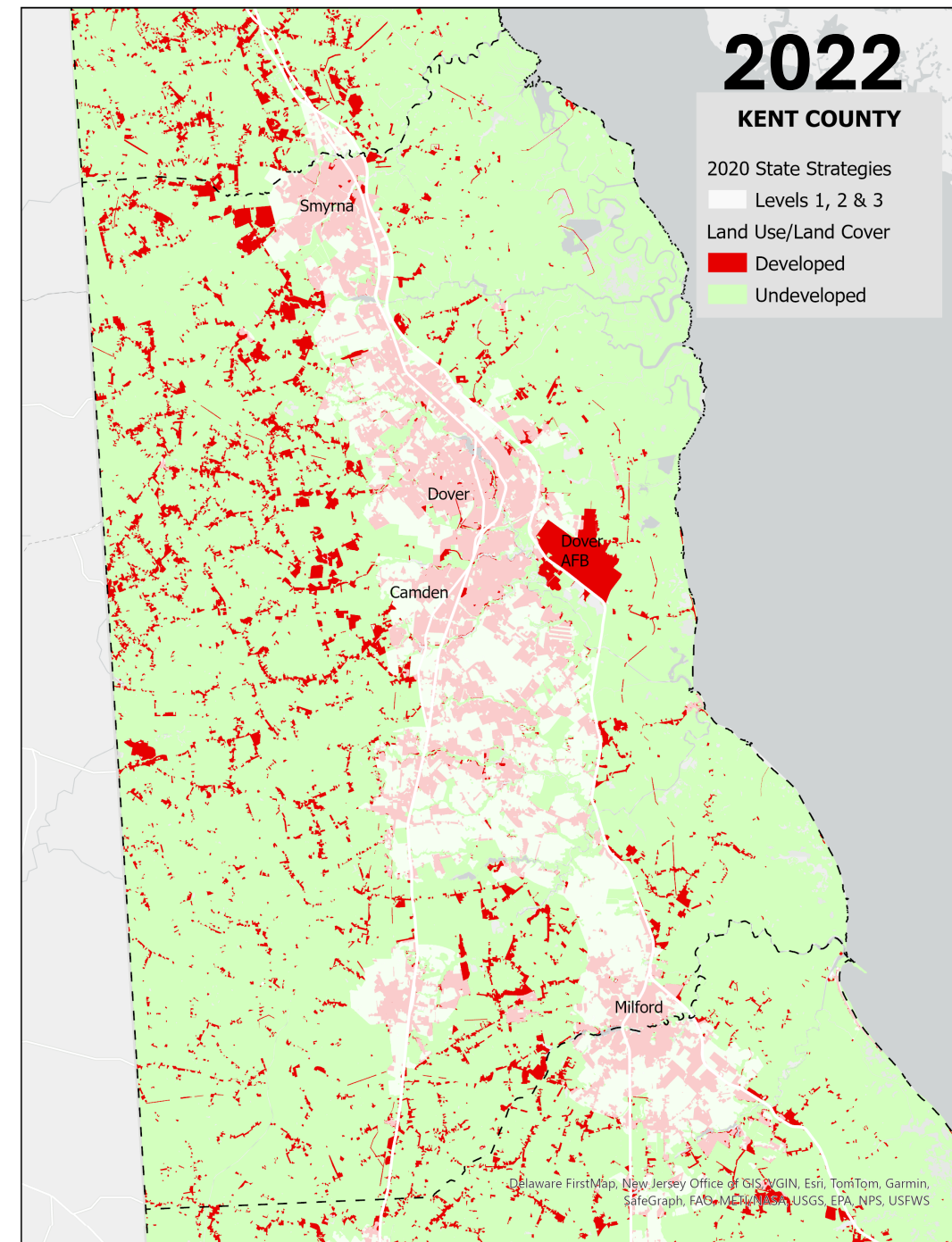
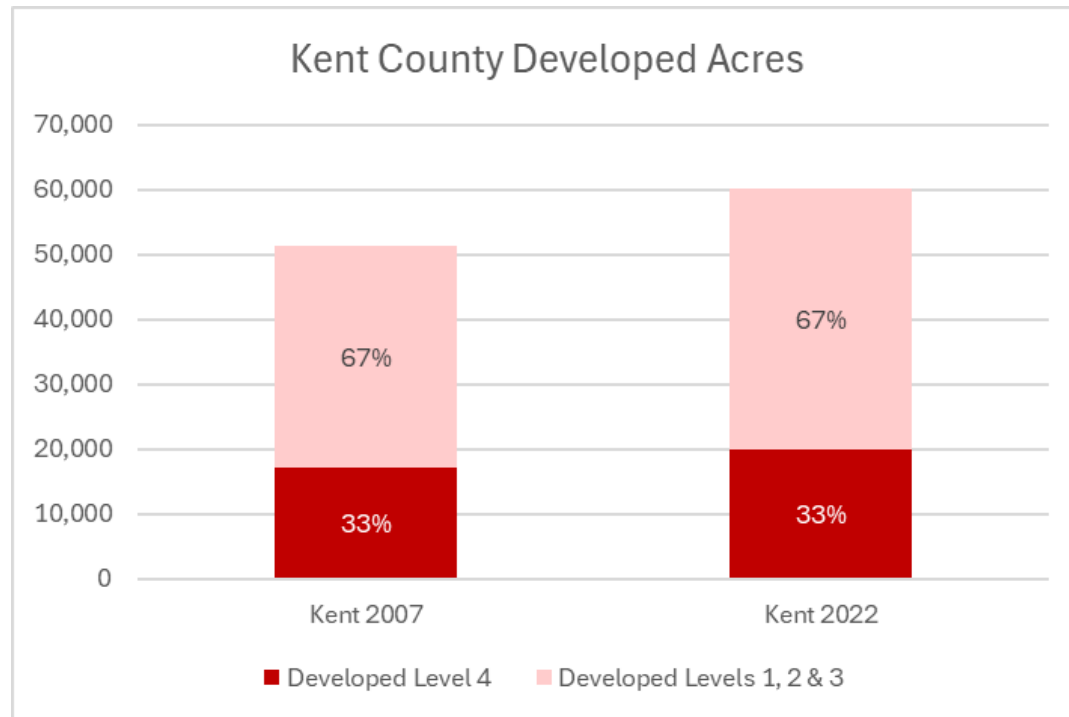
Percent of land developable (by TAZ)

Developed Land



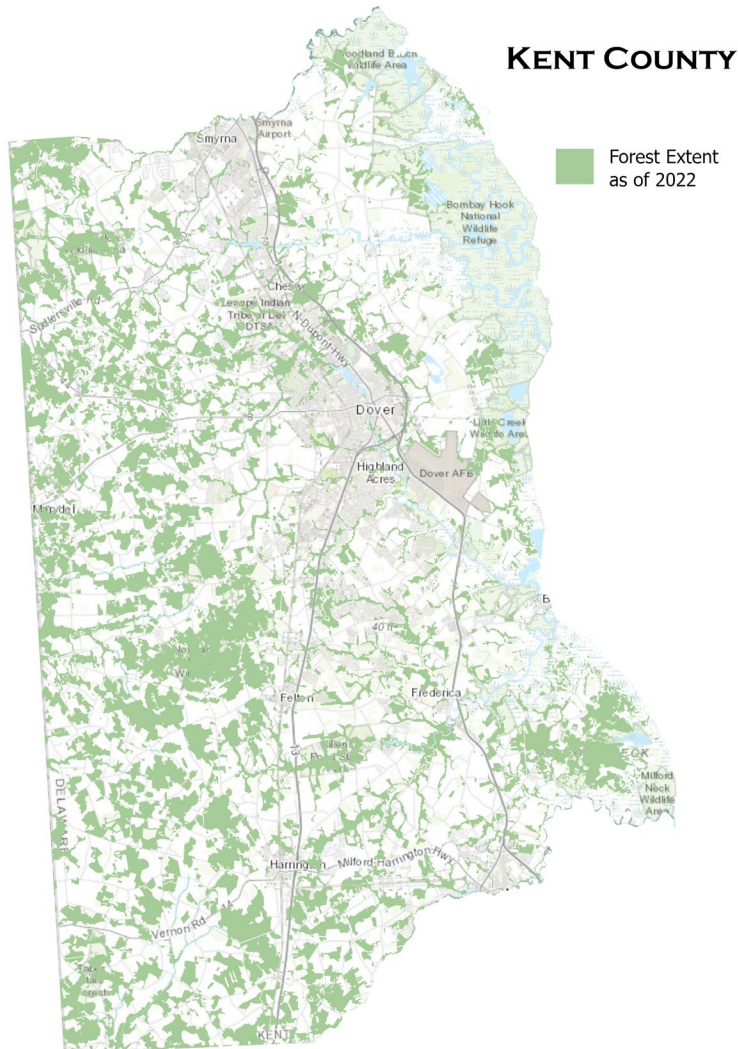
Developed Land

- 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

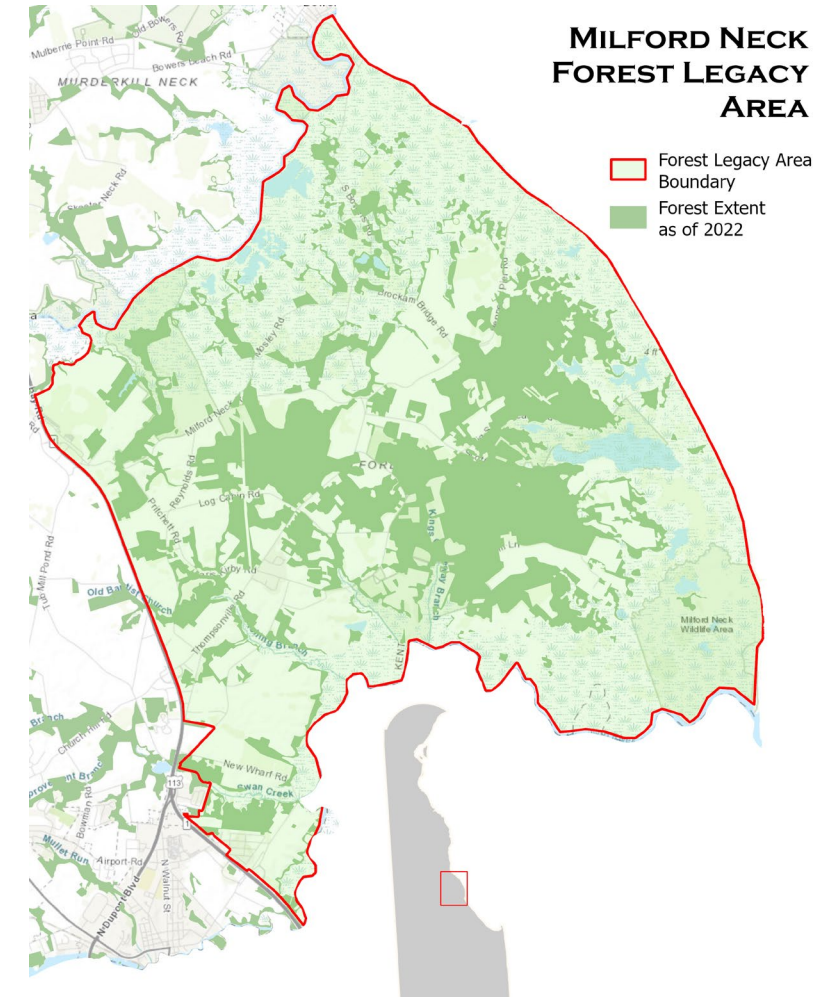
Delaware Statewide Forest Strategy



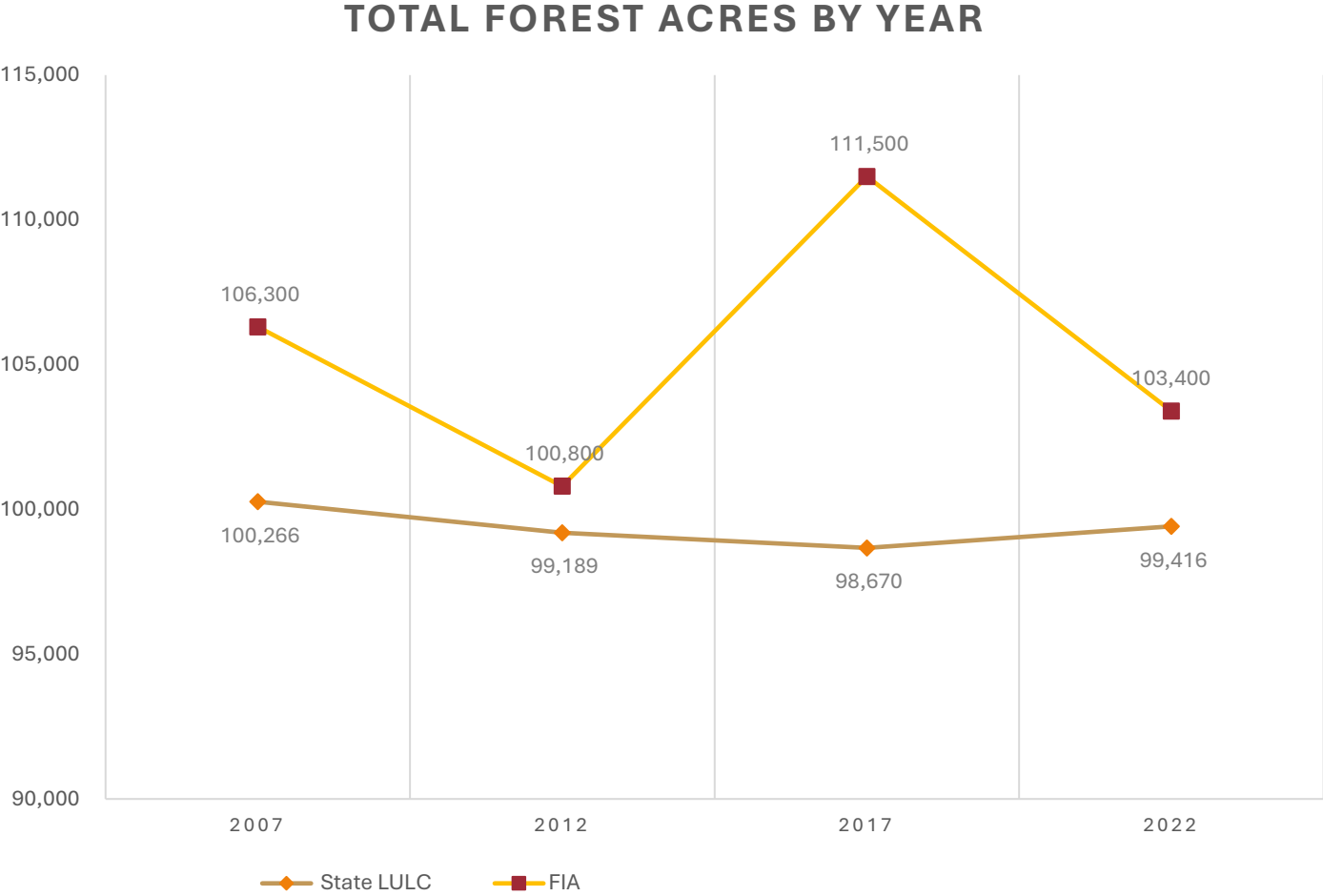
First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands



Environment – Land / Resources at Risk

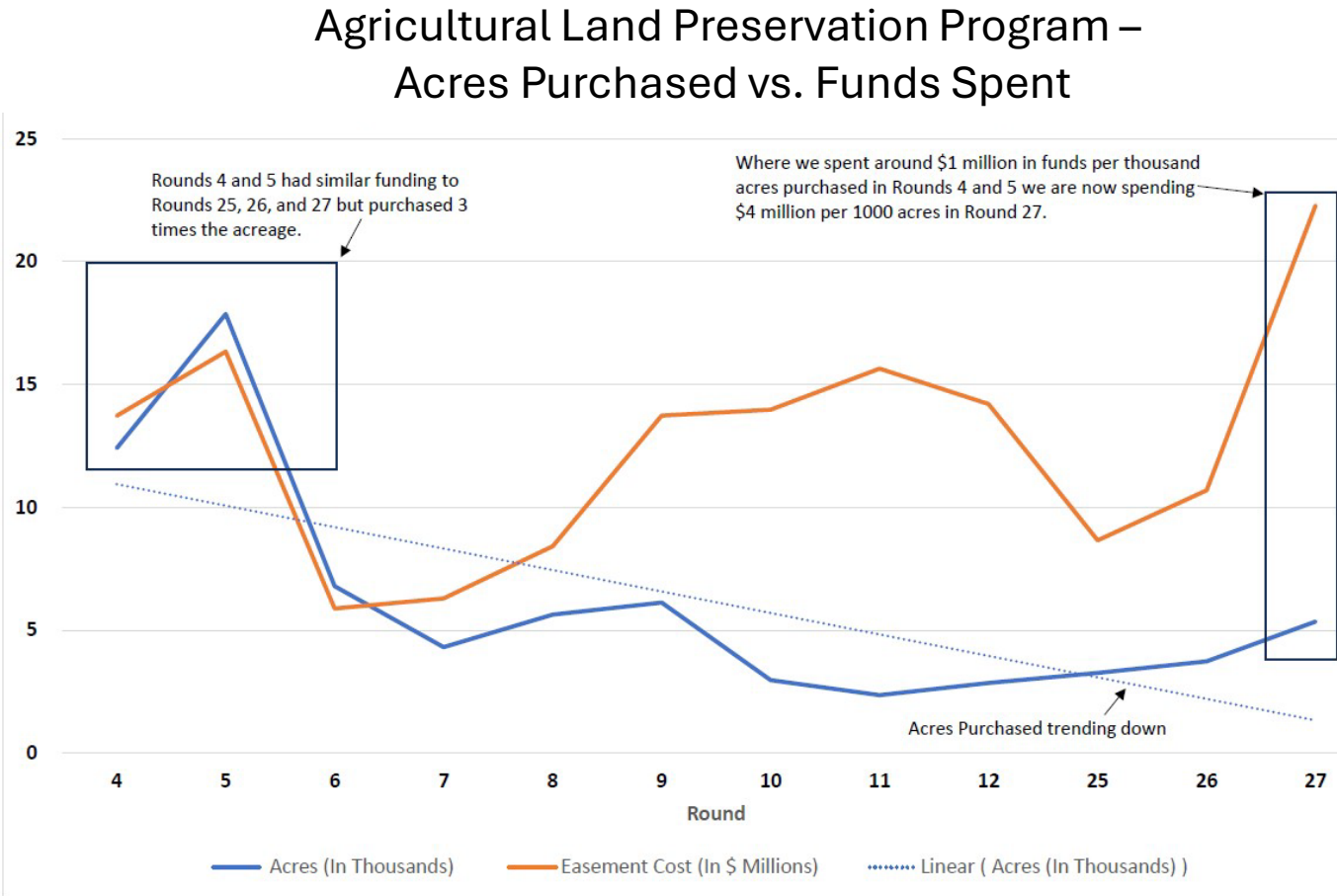
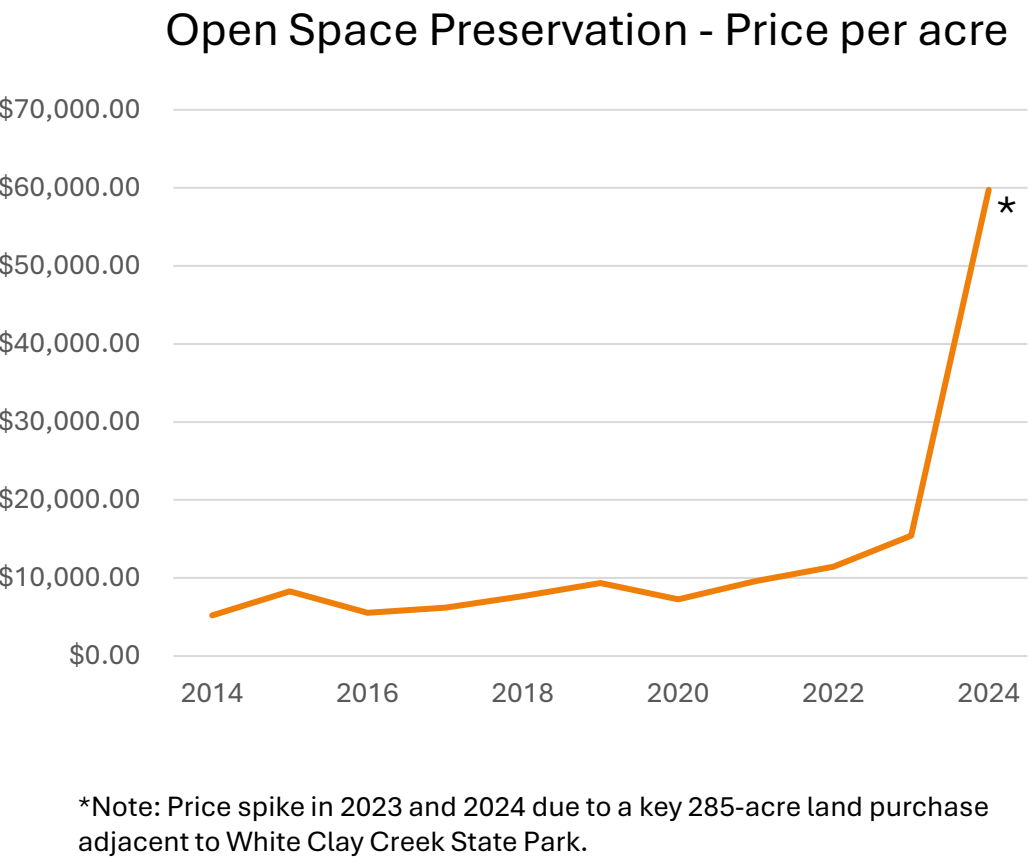


Land Use Land Cover data

LULC – Land Use Land Cover

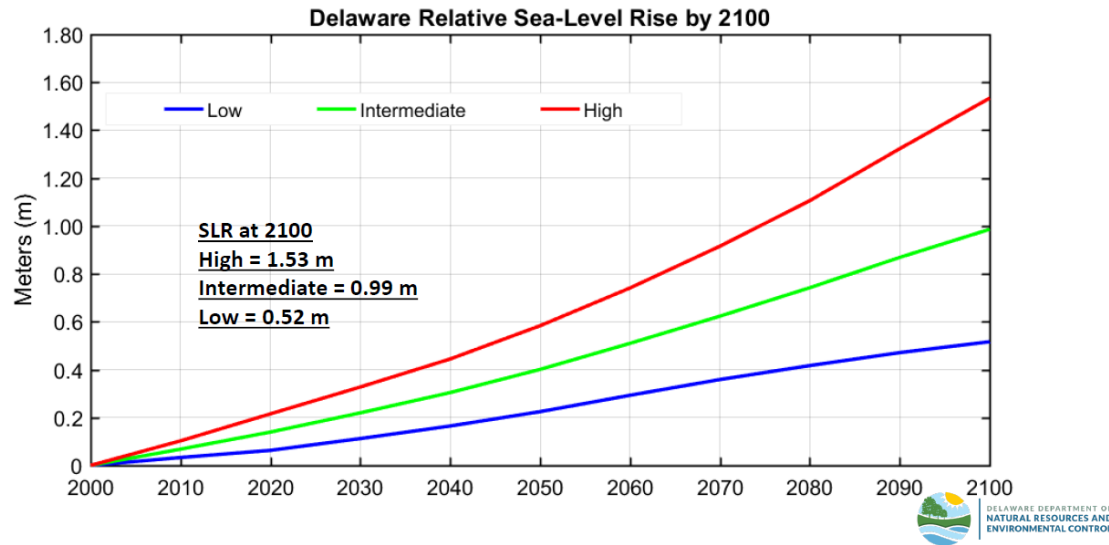
FIA - Forest Inventory and Analysis

Environment – Preservation Efforts and Challenges



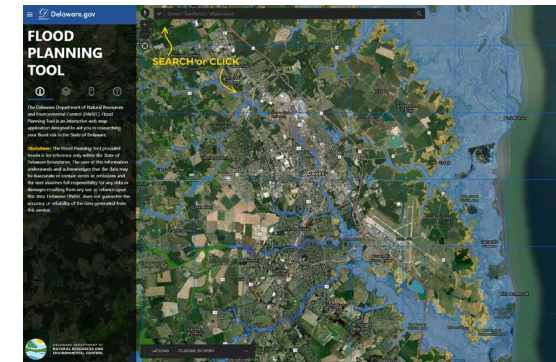
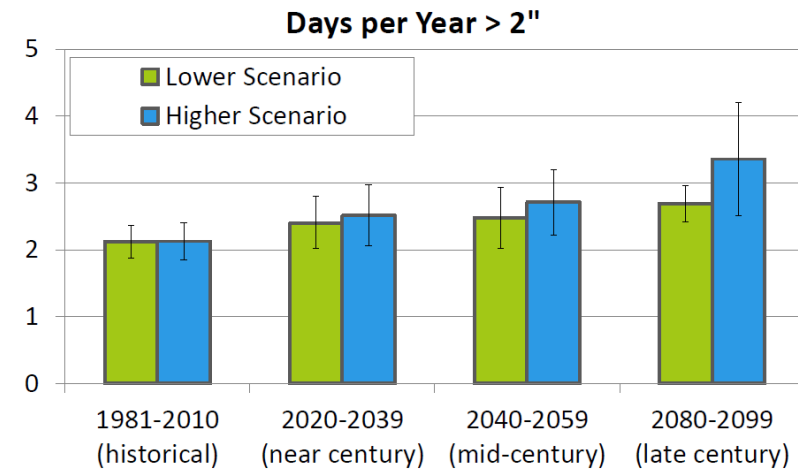
Environment – Resiliency and Adaptation

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

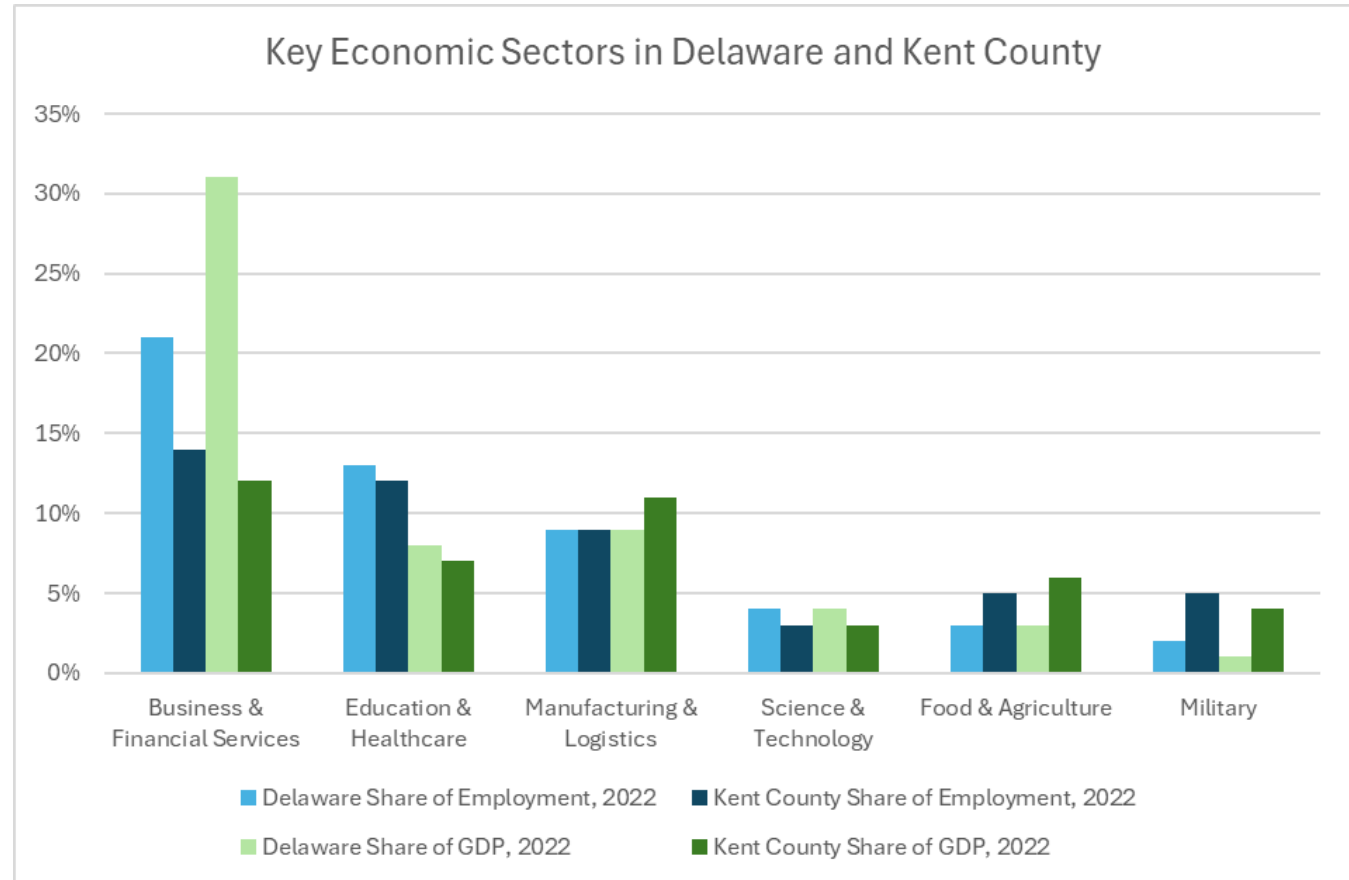
Kent County total jobs: 97,397

Delaware total GDP: \$90.4 billion

Kent County GDP: \$10.4 billion

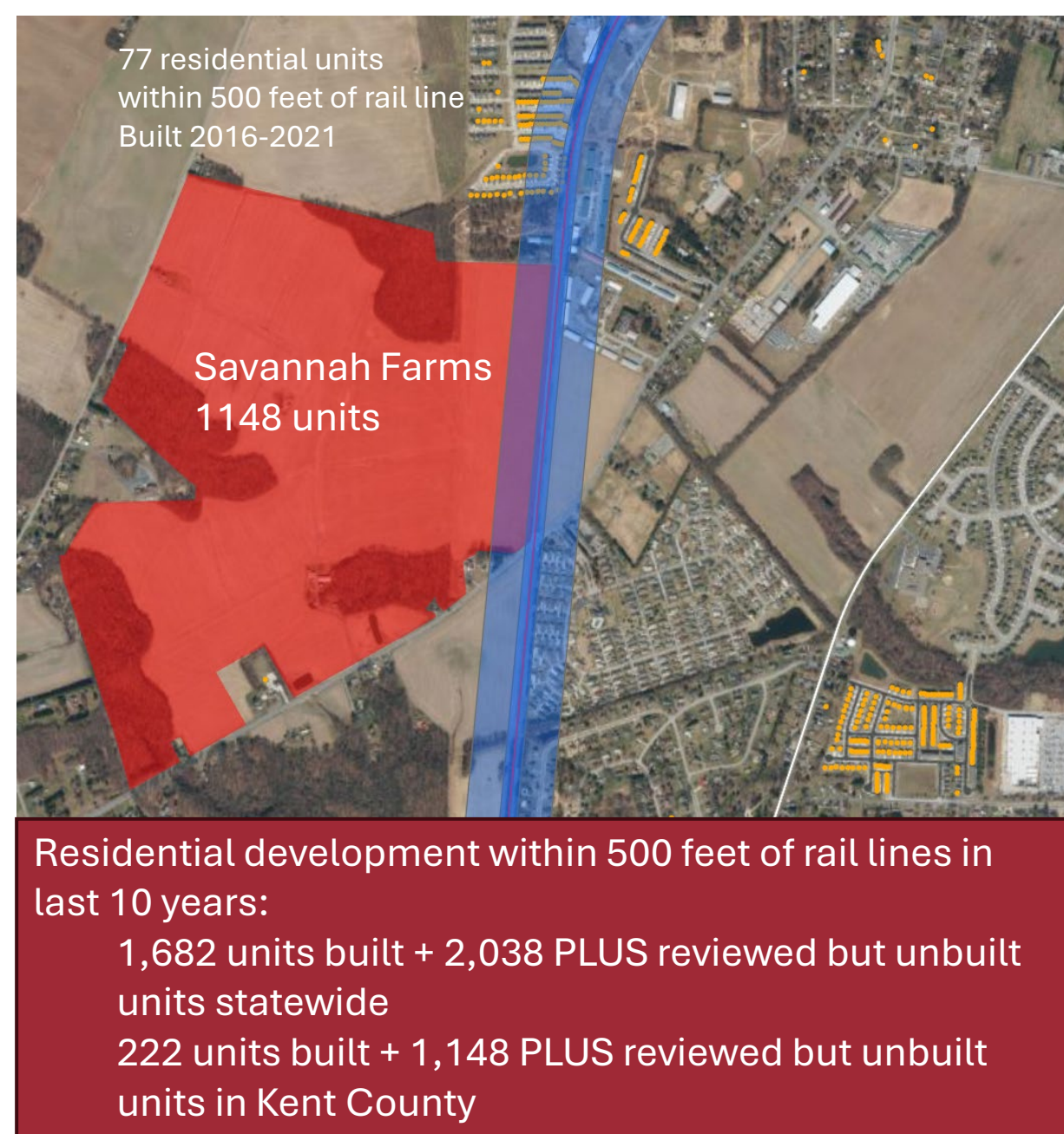
- Future industries?

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



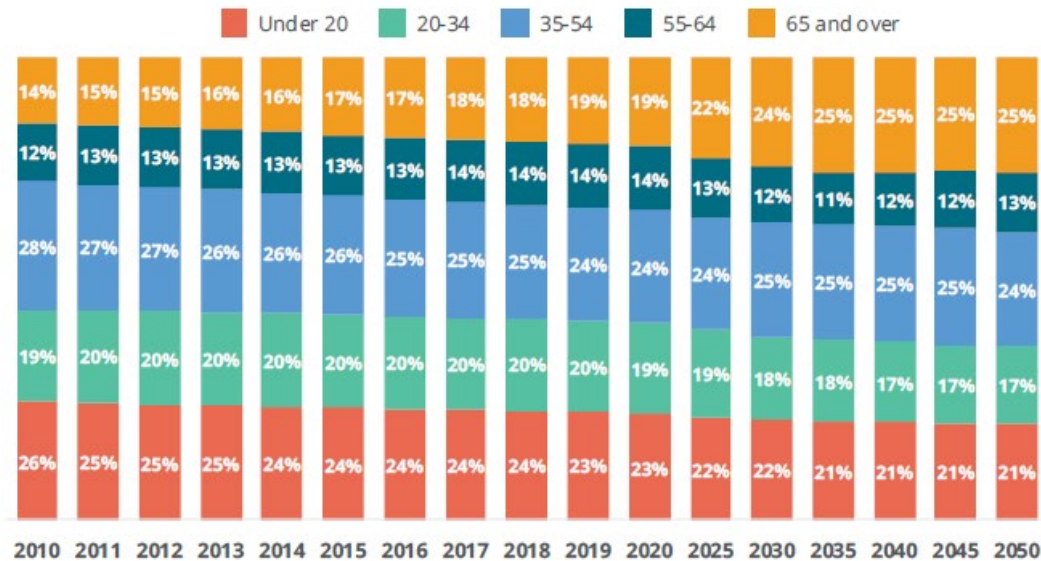
Economy – Concerns

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



Economy – Workforce

Population Projections by Age, Delaware, 2010 - 2050



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%

- 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

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.



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

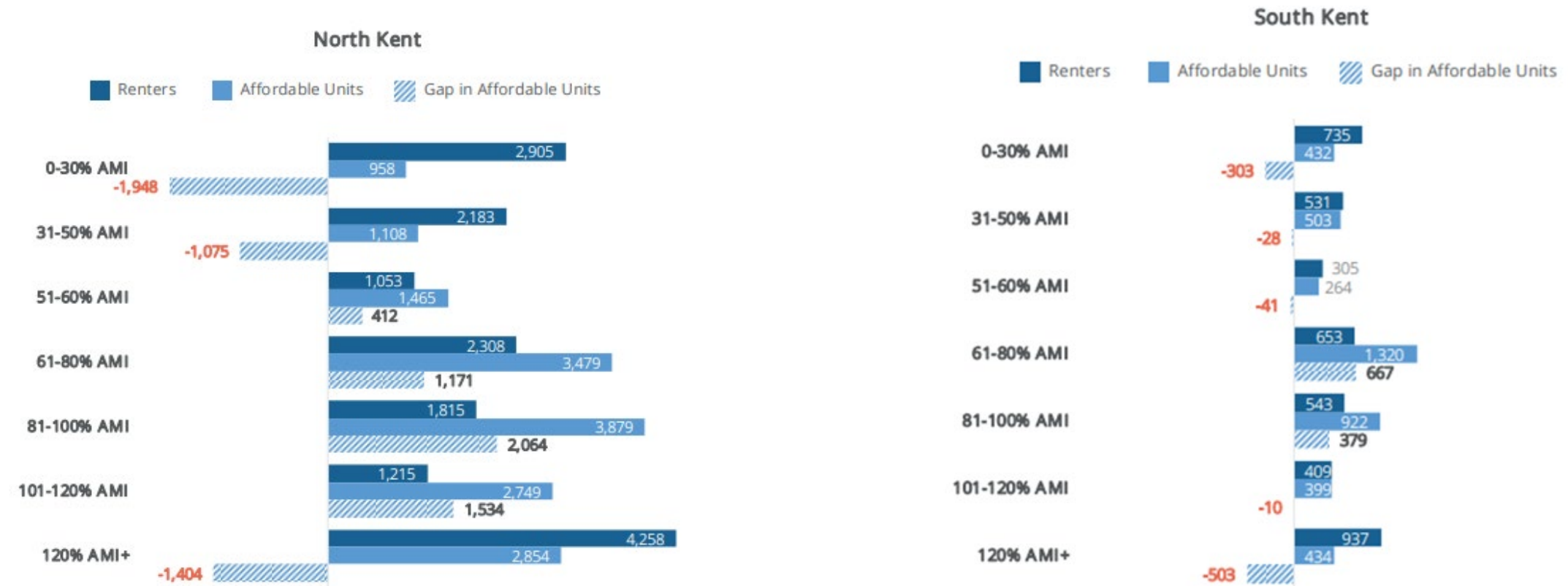


5,200
rental units



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

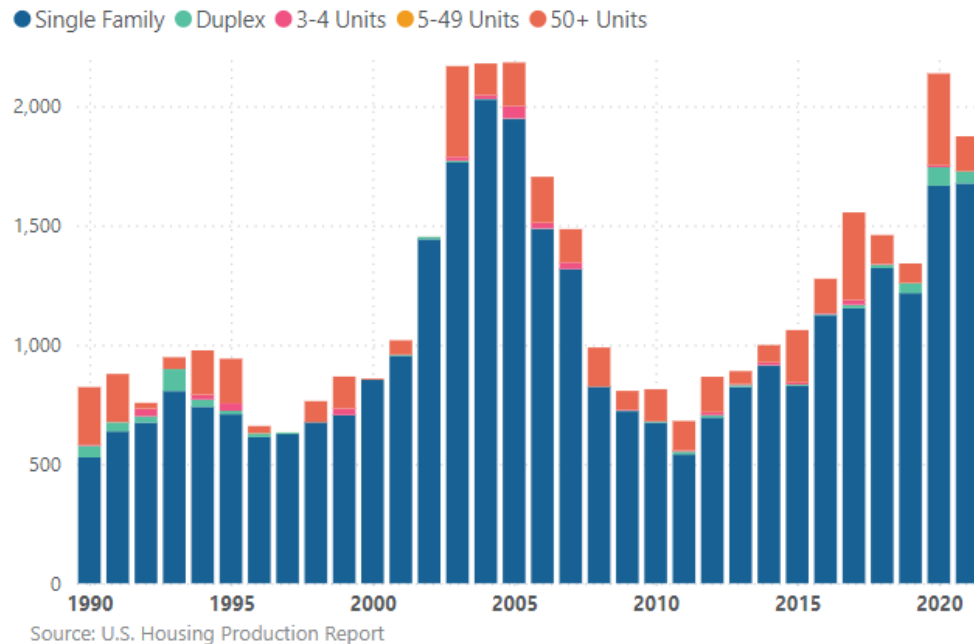
Housing



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.

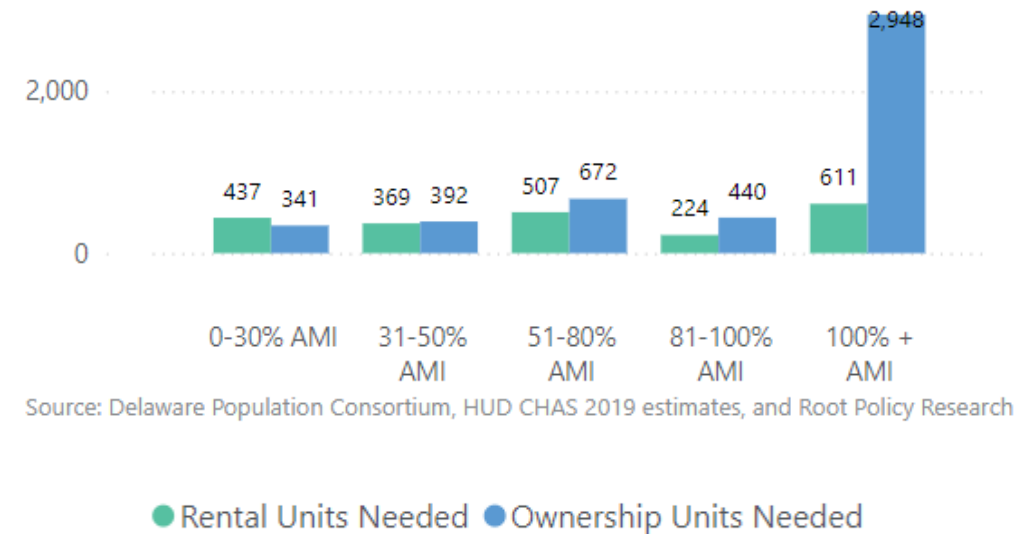
Housing – Kent County

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:



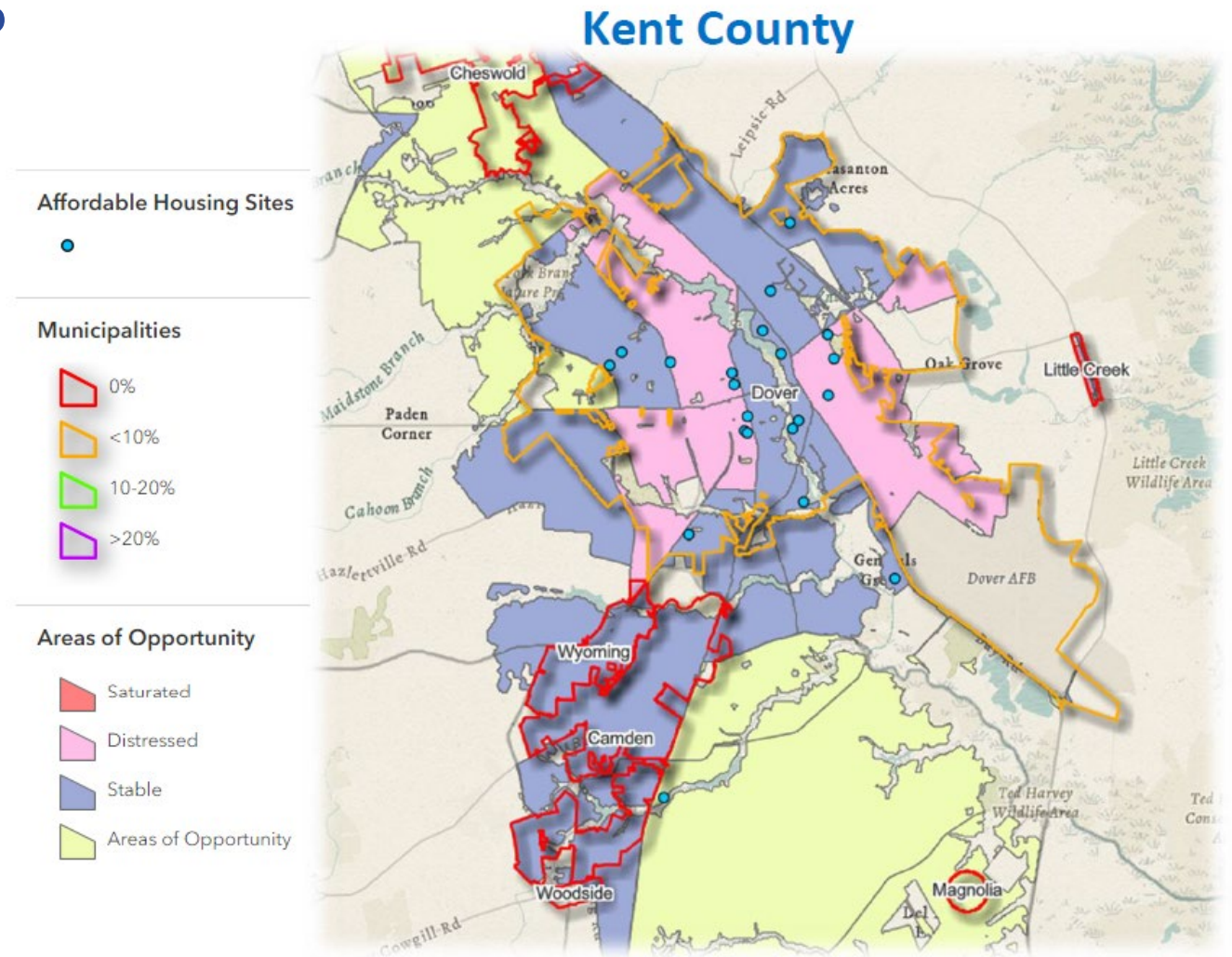
Total: 6,941 units needed, of which:

- 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



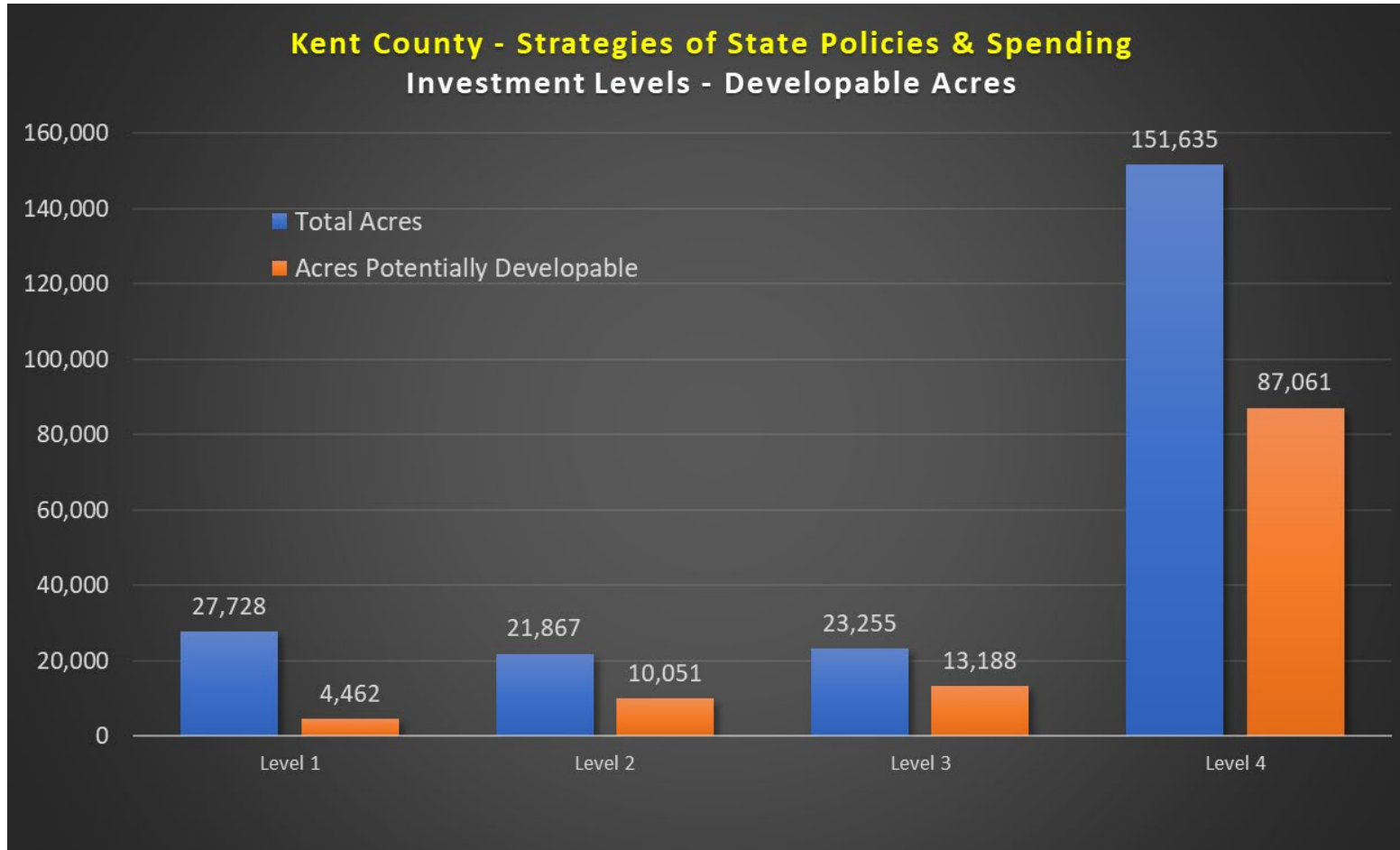


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Data Analysis Workgroup

Conclusions and Discussion

What resonates? What is your experience?

Concluding Points



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