



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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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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- 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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- 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 on occasion 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

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



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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



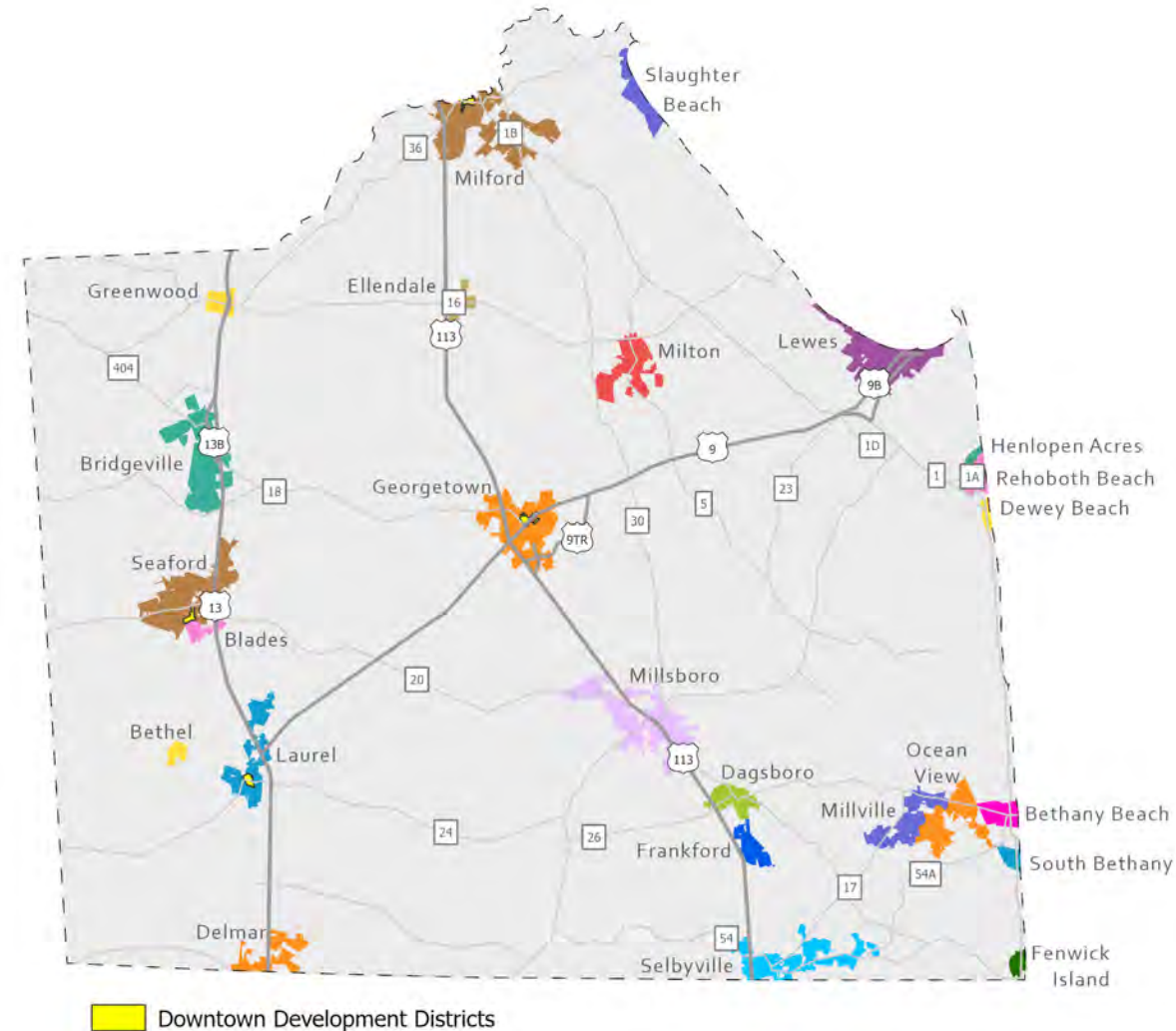
Title 22 requires all municipalities to prepare comprehensive land use plans

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?

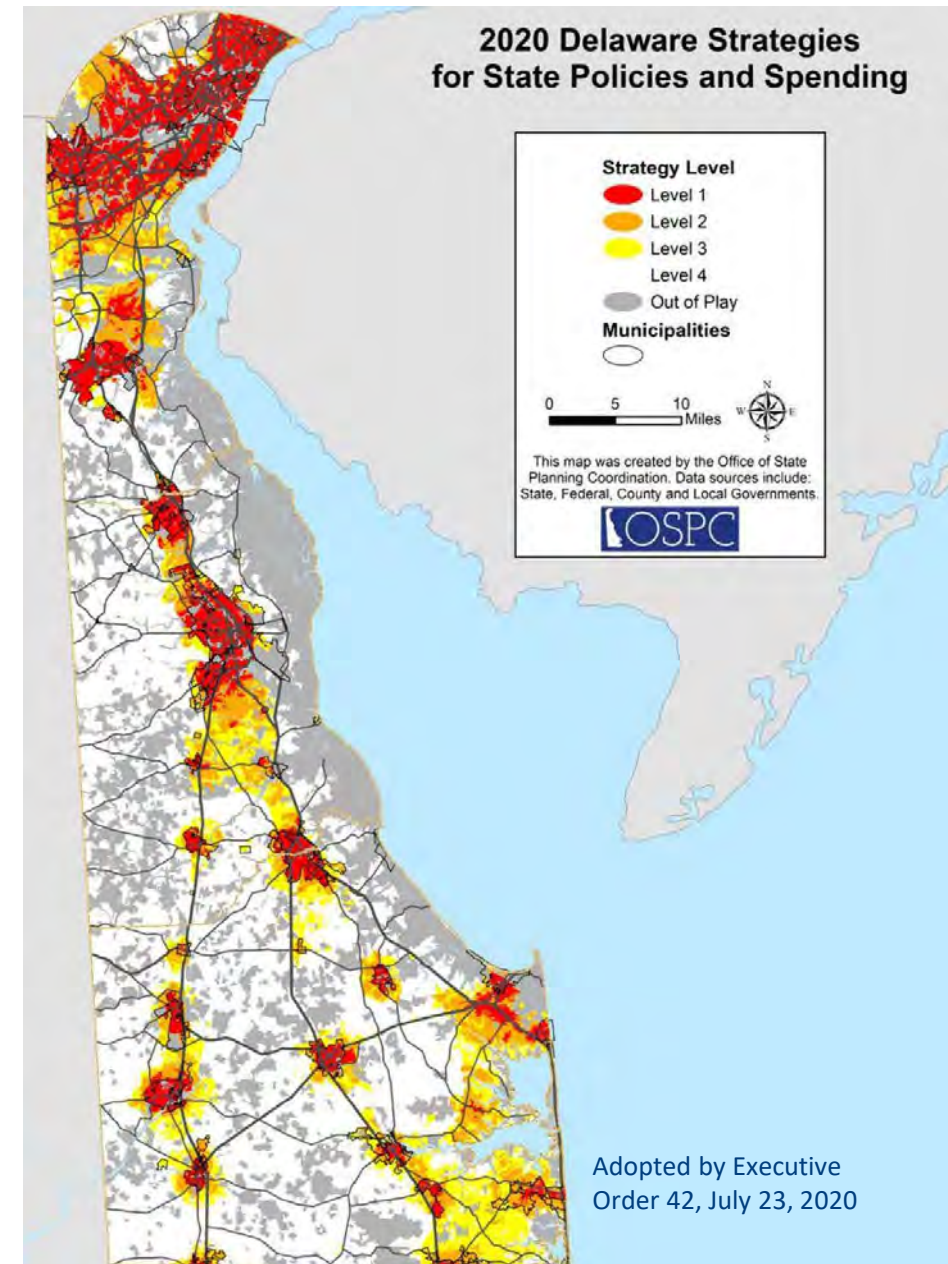
- **Required by Delaware Code*:**

... *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...***

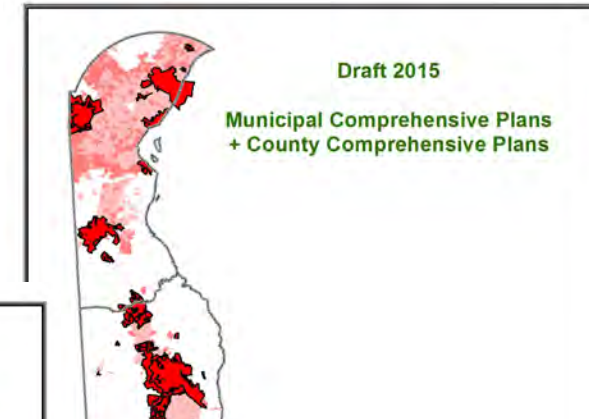
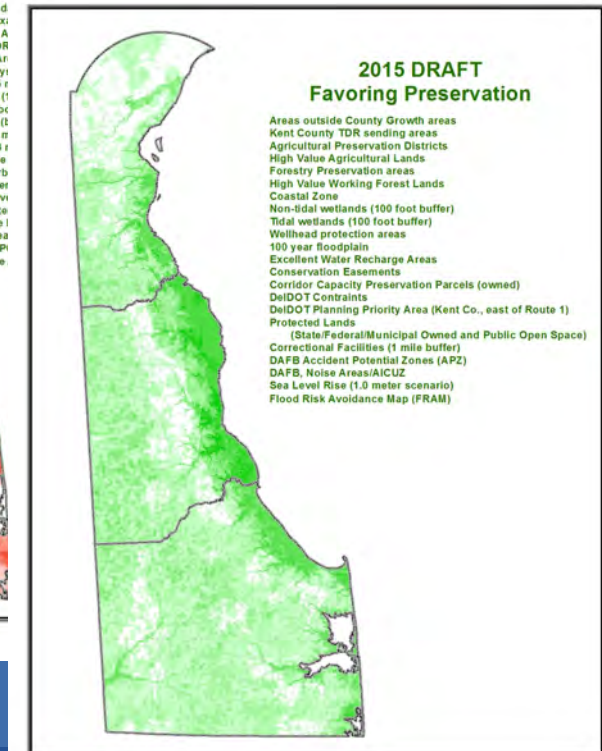
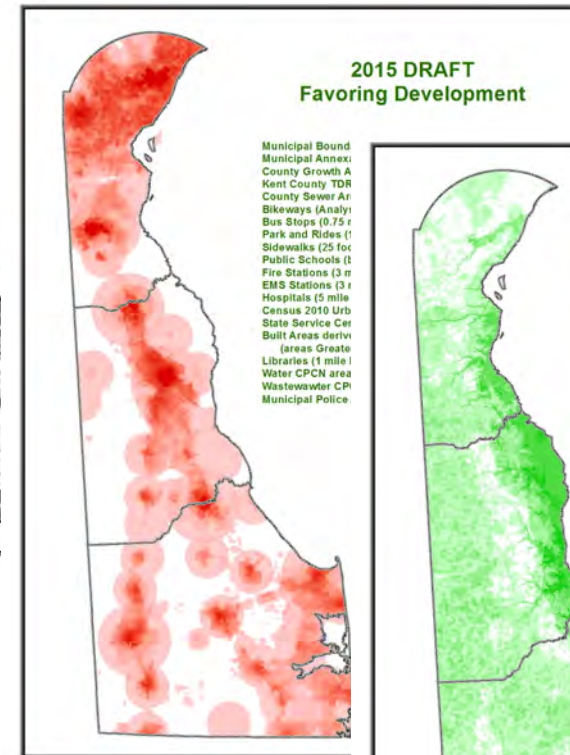
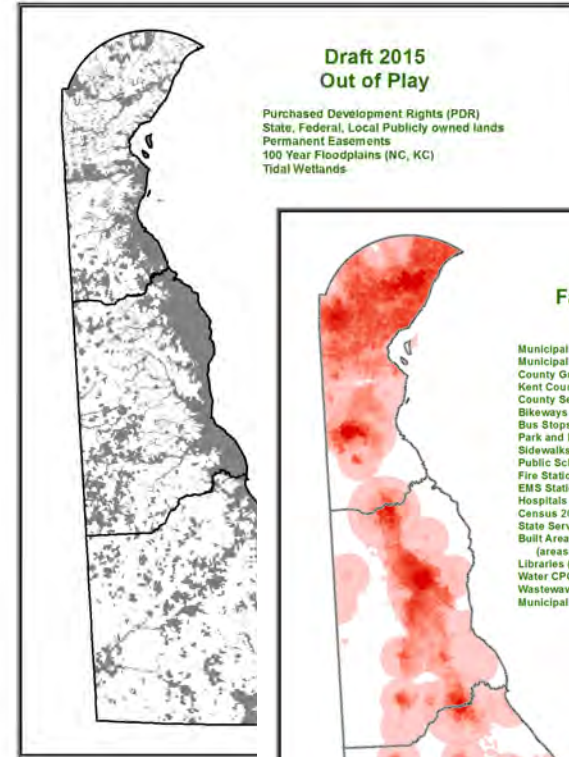
- **Policies and maps guide State investments in infrastructure and services**
- **Do not preempt local land use authority; localities make own land use decisions per Delaware law**
- **Must be considered in local comprehensive plans**
- **History: 1999 adopted; Updated in 2004, 2011, 2015 & 2020**

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

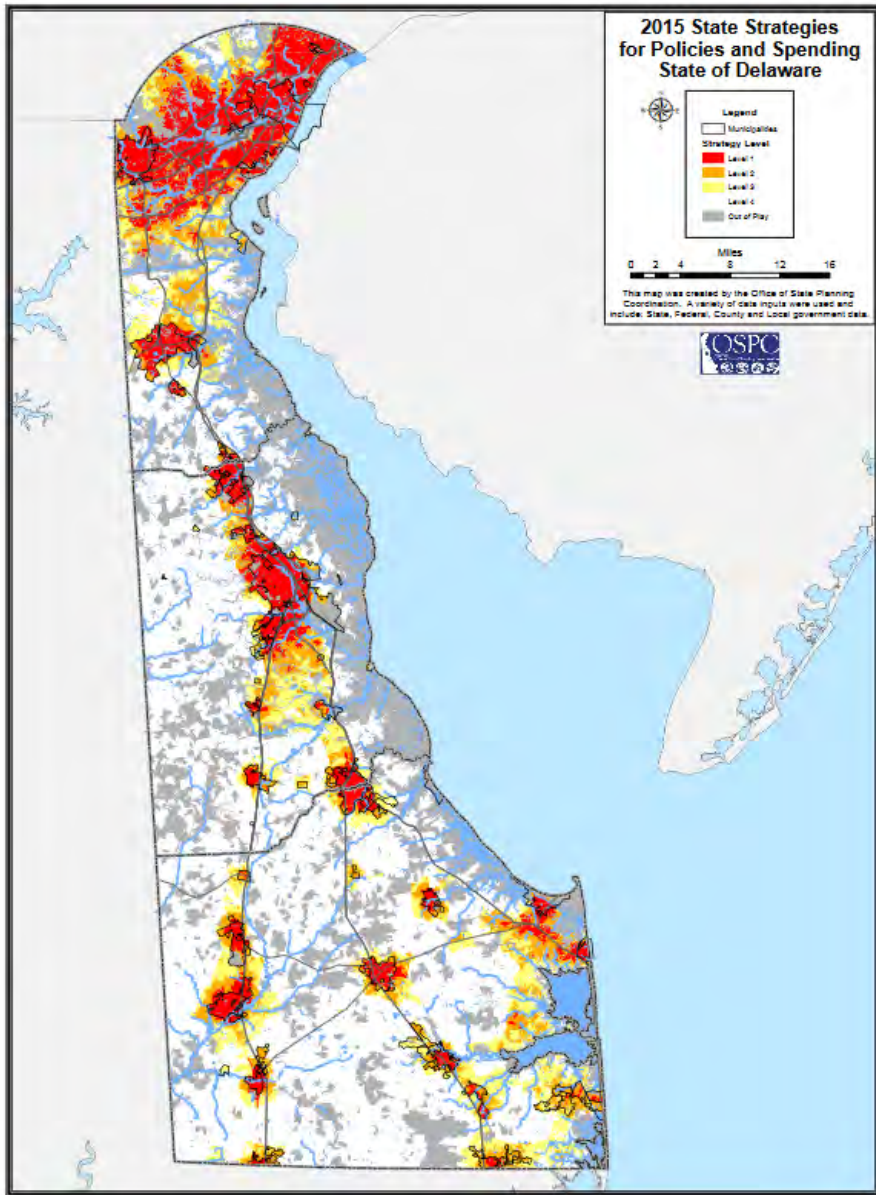


Data used to make maps include:

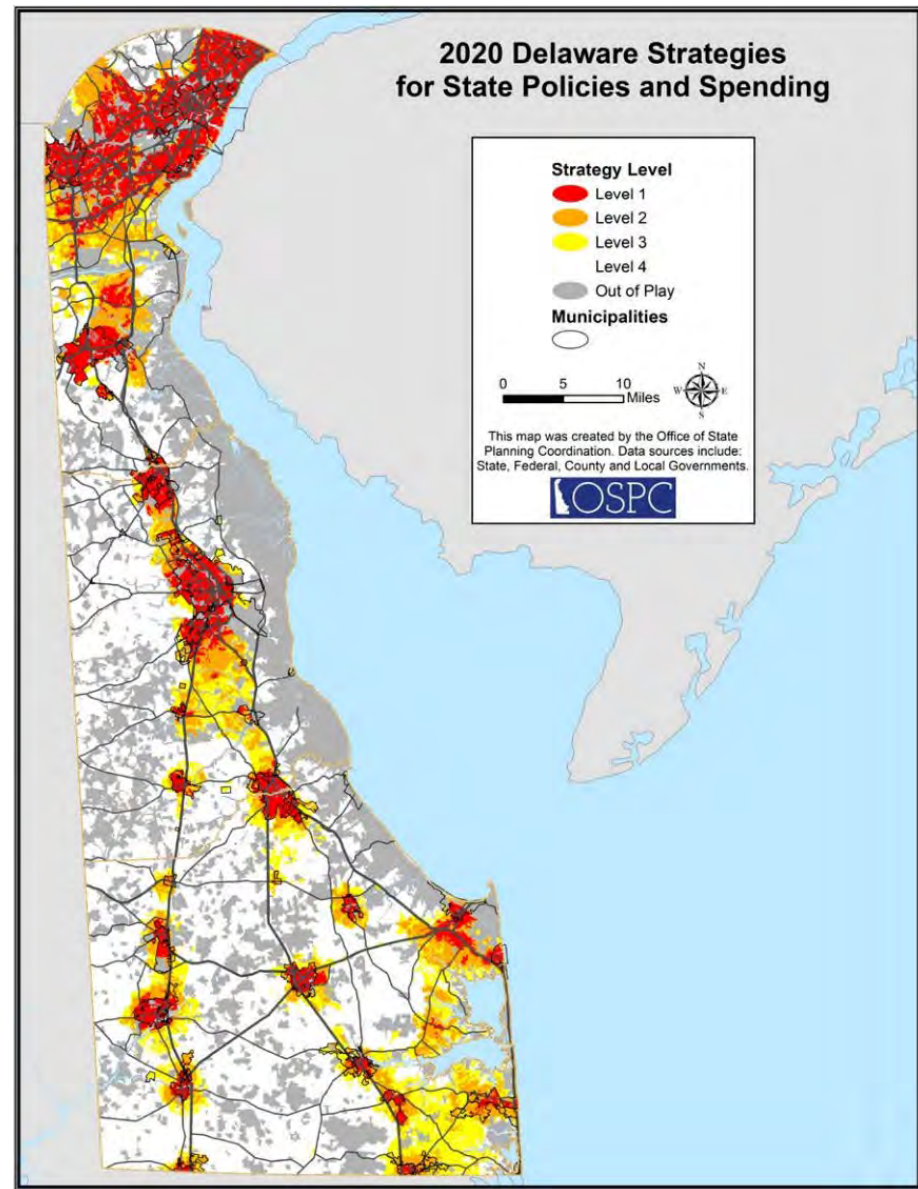
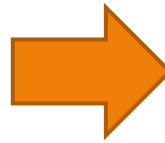
- School Sites
- Transit Routes
- Social Service Centers
- Police/Fire/EMS Facilities
- Corridor Capacity Preservation Areas
- Ag Preservation Districts
- Green Infrastructure
- Parklands
- Municipal and County certified comprehensive plans



Packets on table show the layers used to generate maps



2015 Strategies



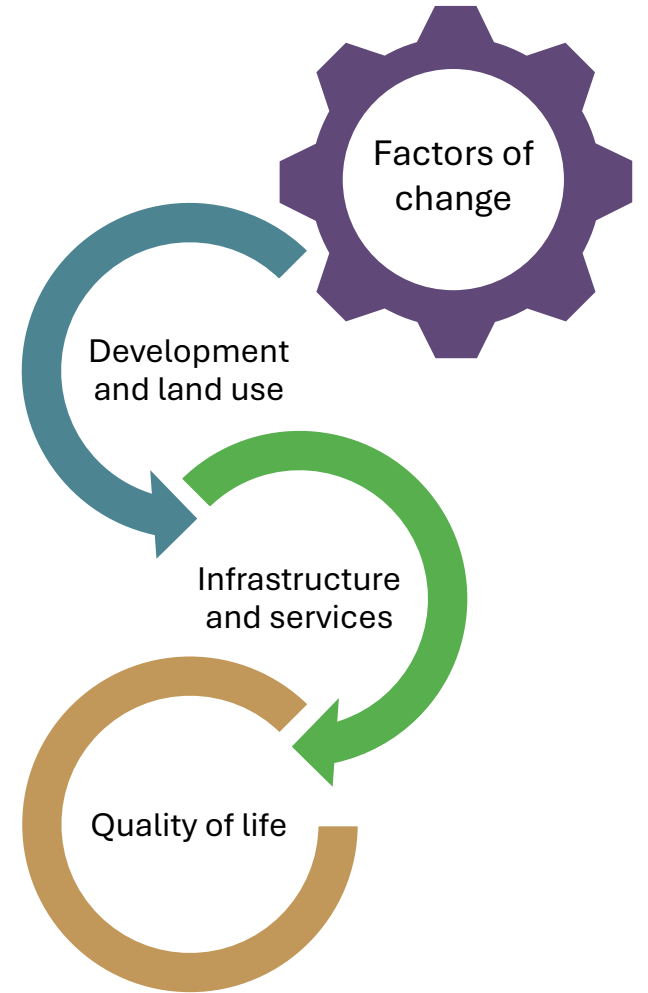
2020 Strategies



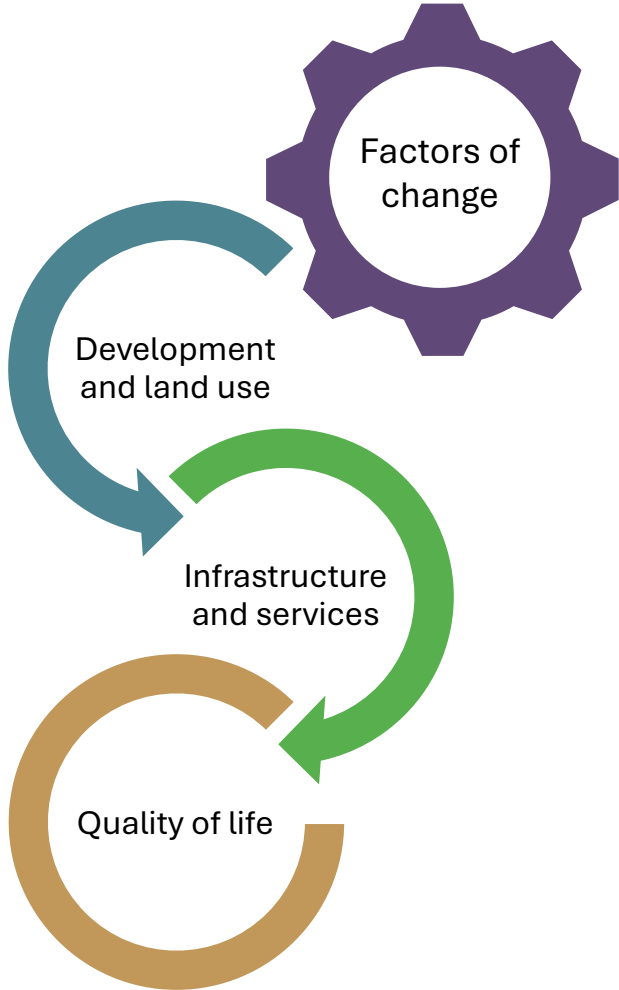
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II. Data-Backed Insights

External factors and their effects on Delaware communities



External Factors



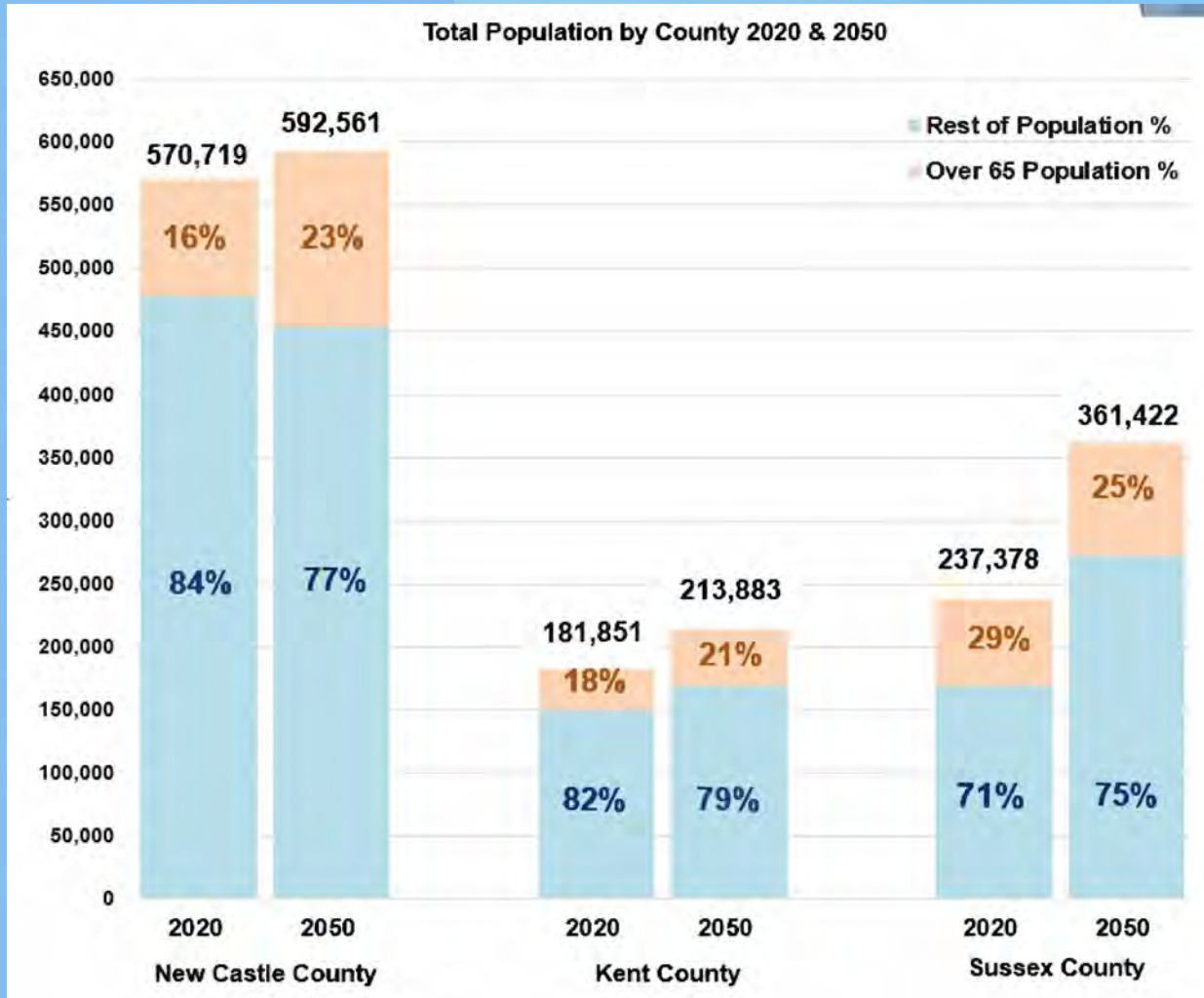
Factors Affecting Delaware



- **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.



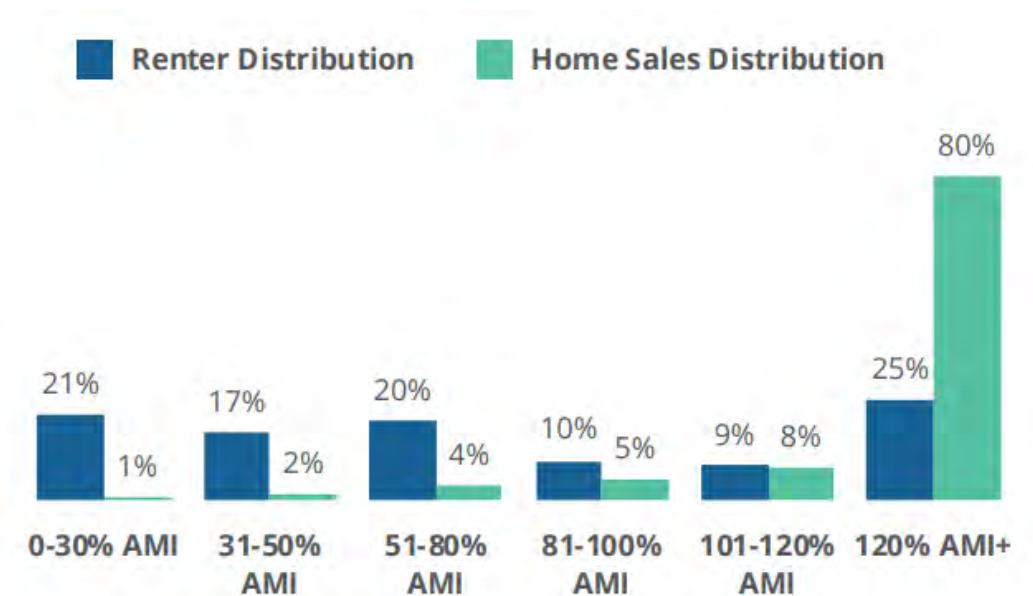
Data Insight: Demographics are Changing

- 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.

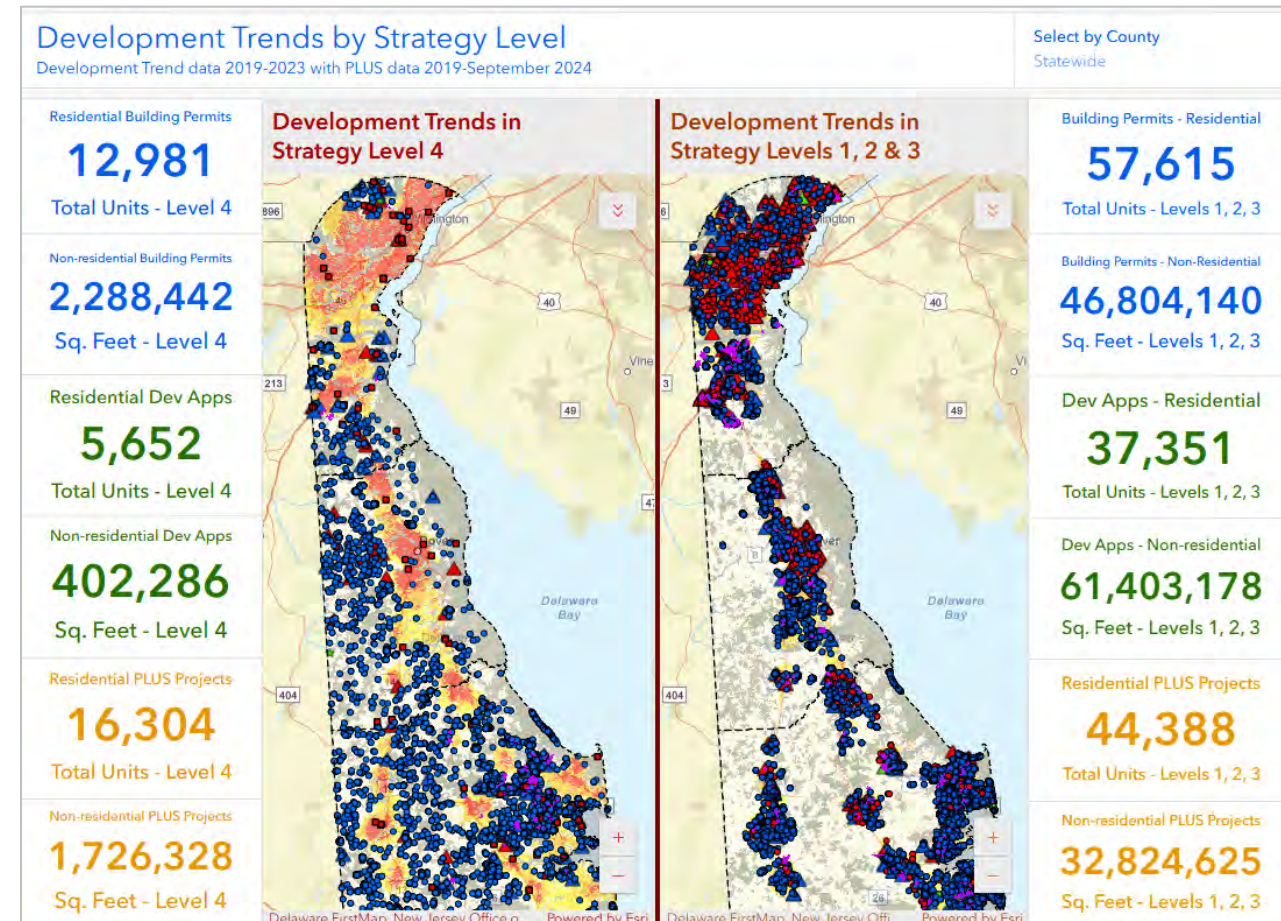
Source: Root Policy Research, 2021 ACS 5 year estimates, and HMDA.

Data Insight: Development and Land Use

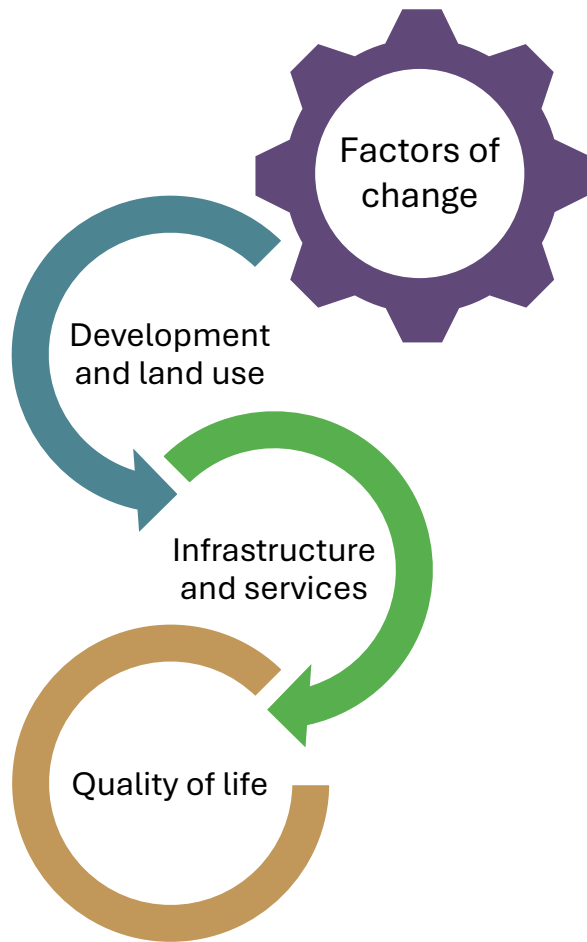
- Sprawl
- Uniform housing
- Warehousing/logistics

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

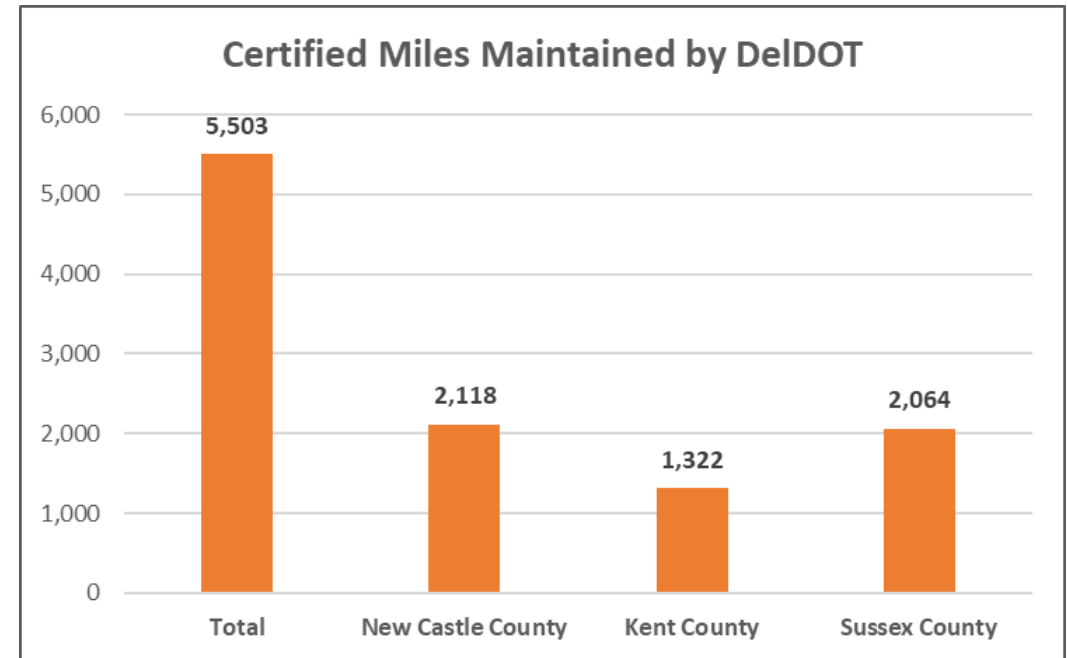
Housing

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.



Services operating costs will continue to increase		Cost per trip, cost per mile, and cost per vehicle are all rising
Efficiency will decrease		Miles-per-route are increasing, but revenue-per-mile is decreasing
Travel needs will continue evolving		Total trips are declining and average trip lengths are getting shorter

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

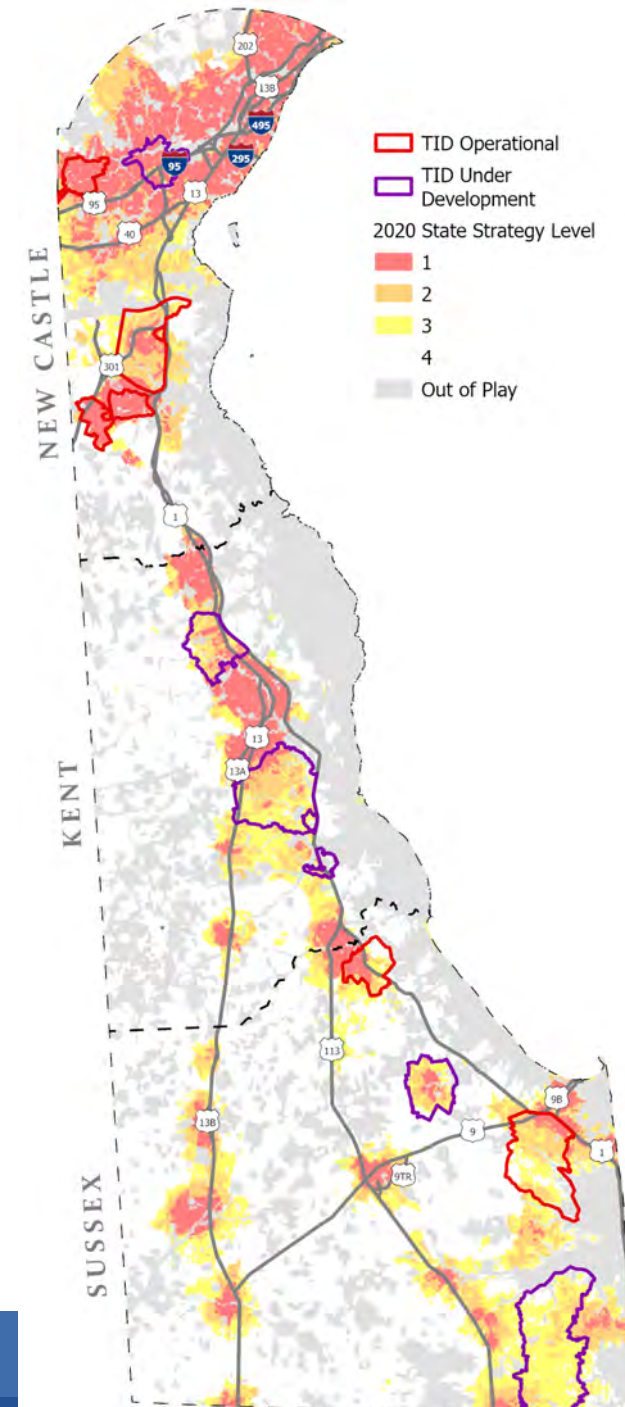
(includes 2 of 7 TIDs currently under development)

TID Operational

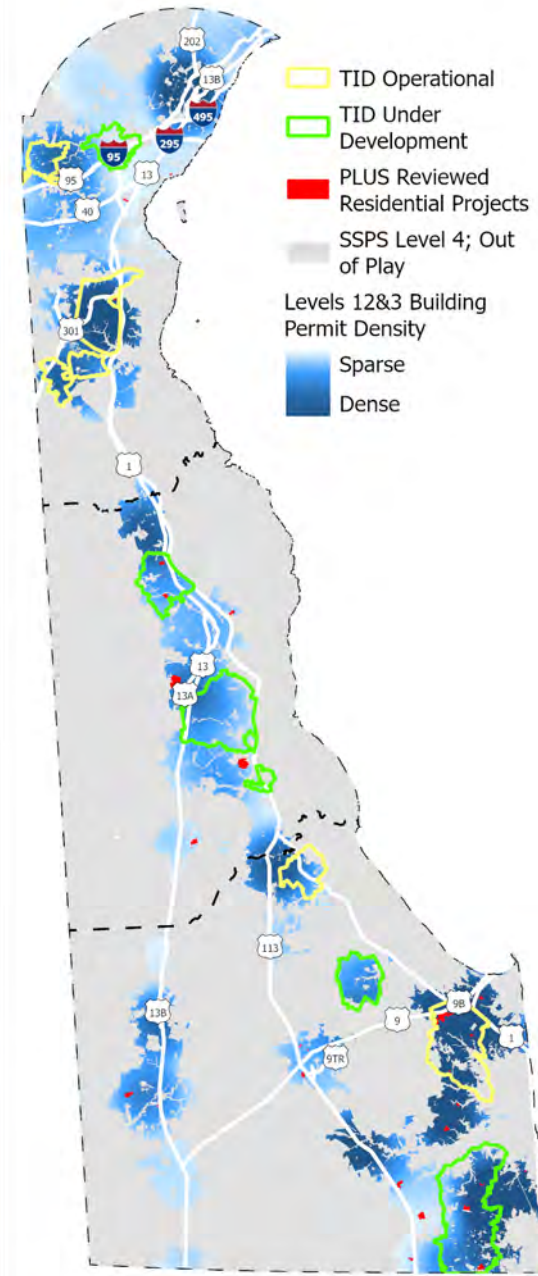
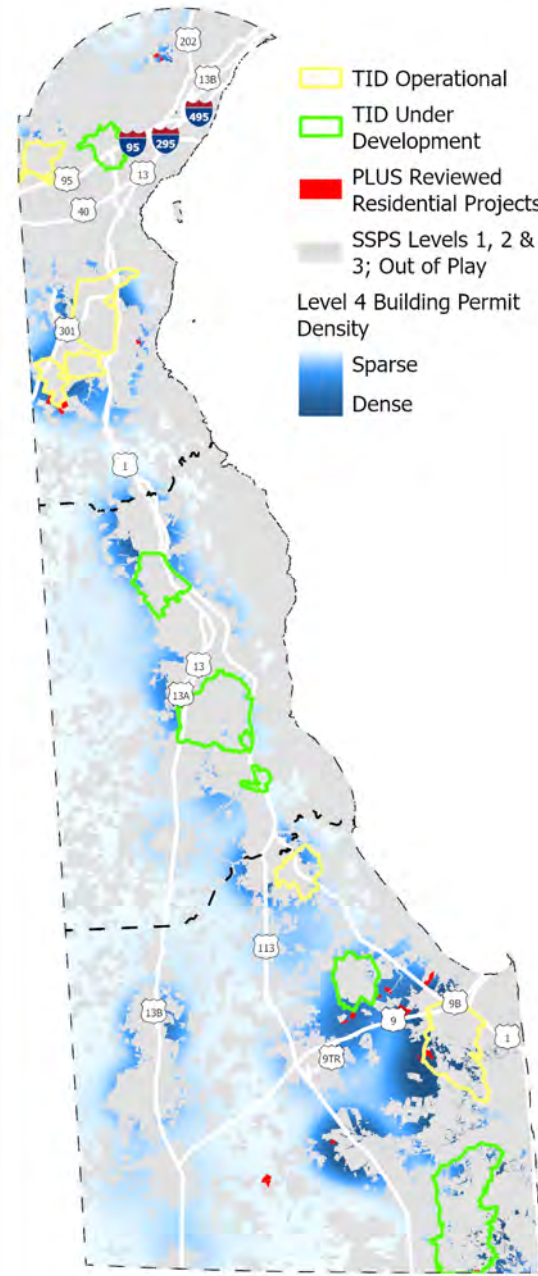
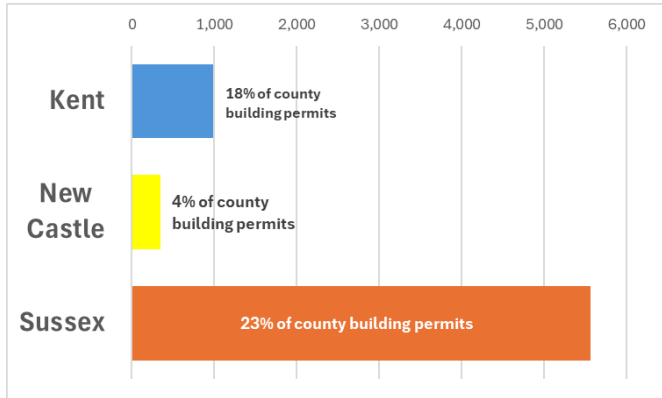
- Newark
- Southern New Castle County
- Hyetts Corner
- Westtown
- Eastown
- SE Milford
- Henlopen

TID Under Development

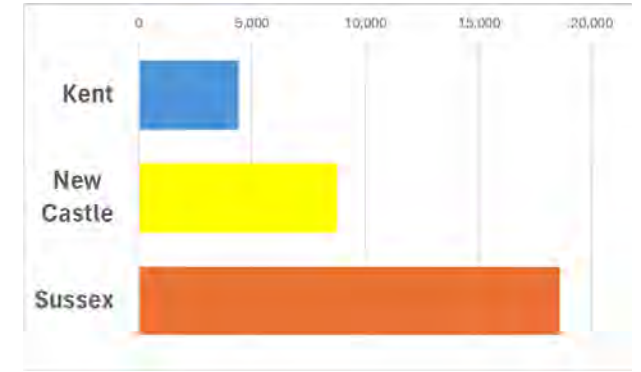
- Little Heaven
- South Frederica
- Cheswold Area
- Magnolia
- Milton
- Roxana Area
- Churchman's Crossing



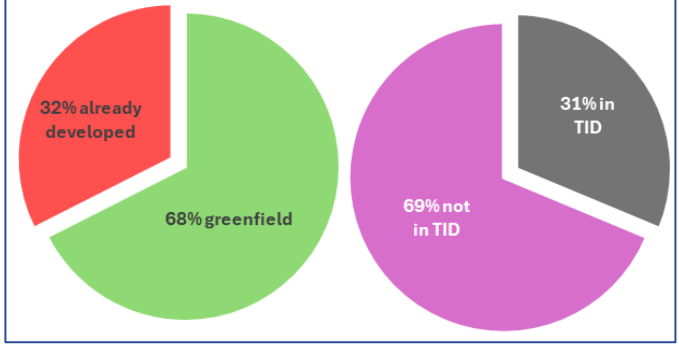
Development Trends in Strategy Level 4



Development Trends in Strategy Levels 1, 2 and 3

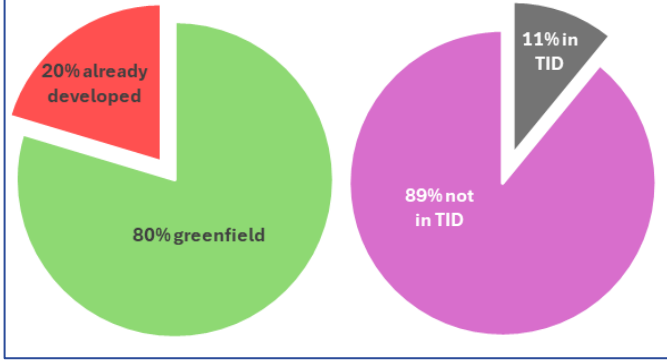


Building Permits Level 1, 2 & 3:
 31,751 residential units (82%)
 25.5M non-residential sqft (97%)



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

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%)

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

Development Trends in Strategy Level 4

SUSSEX COUNTY

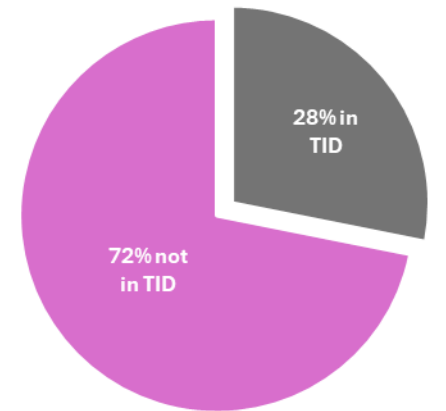
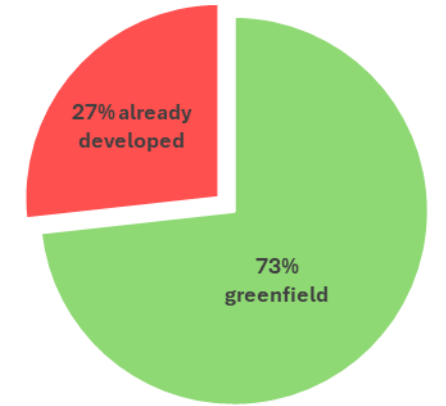
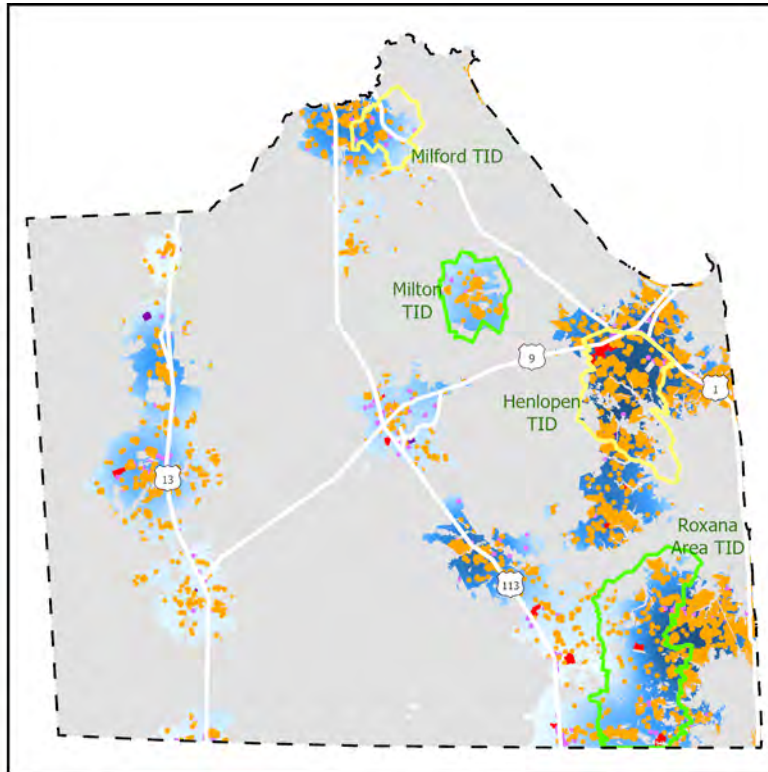
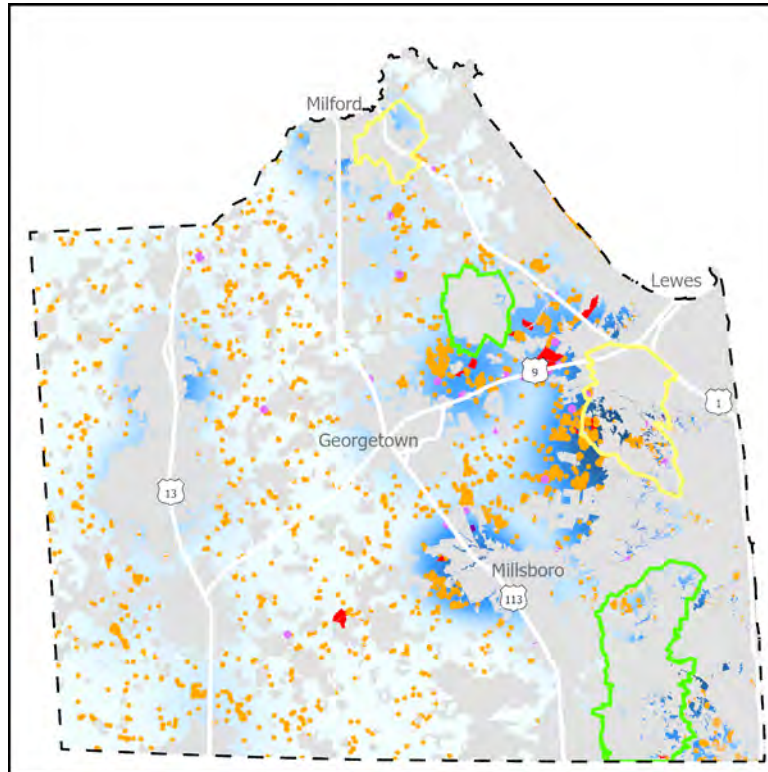
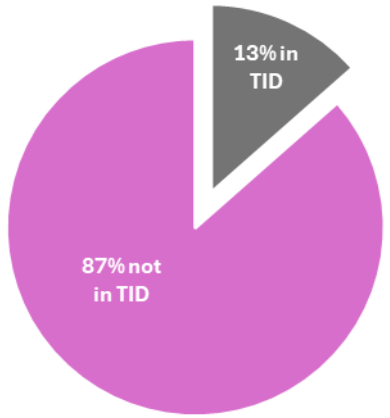
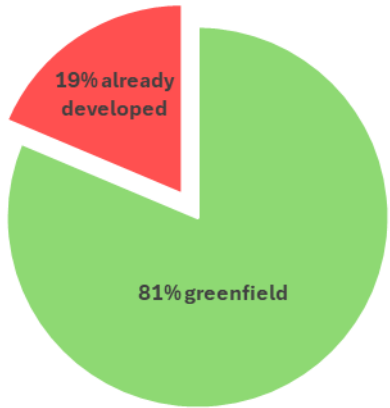
Development Trends in Strategy Levels 1, 2 and 3

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%)

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%)



TID Operational	SSPS Levels 1, 2 & 3; Out of Play	Level 4 Residential Building Permit Density
TID Under Development	PLUS Reviewed Residential Projects	Sparse
Residential Building Permits	PLUS Reviewed Non-Res. Projects	Dense
Non-Residential Building Permits		

TID Operational	SSPS Level 4; Out of Play	Levels 1,2&3 Residential Building Permit Density
TID Under Development	PLUS Reviewed Residential Projects	Sparse
Residential Building Permits	PLUS Reviewed Non-Res. Projects	Dense
Non-Residential Building Permits		

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

Transportation & Land Use



SUSSEX COUNTY
D E L A W A R E

Home Online Payment Question/Comment? Contact Us

Government Citizens Visitors Business Services

- 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

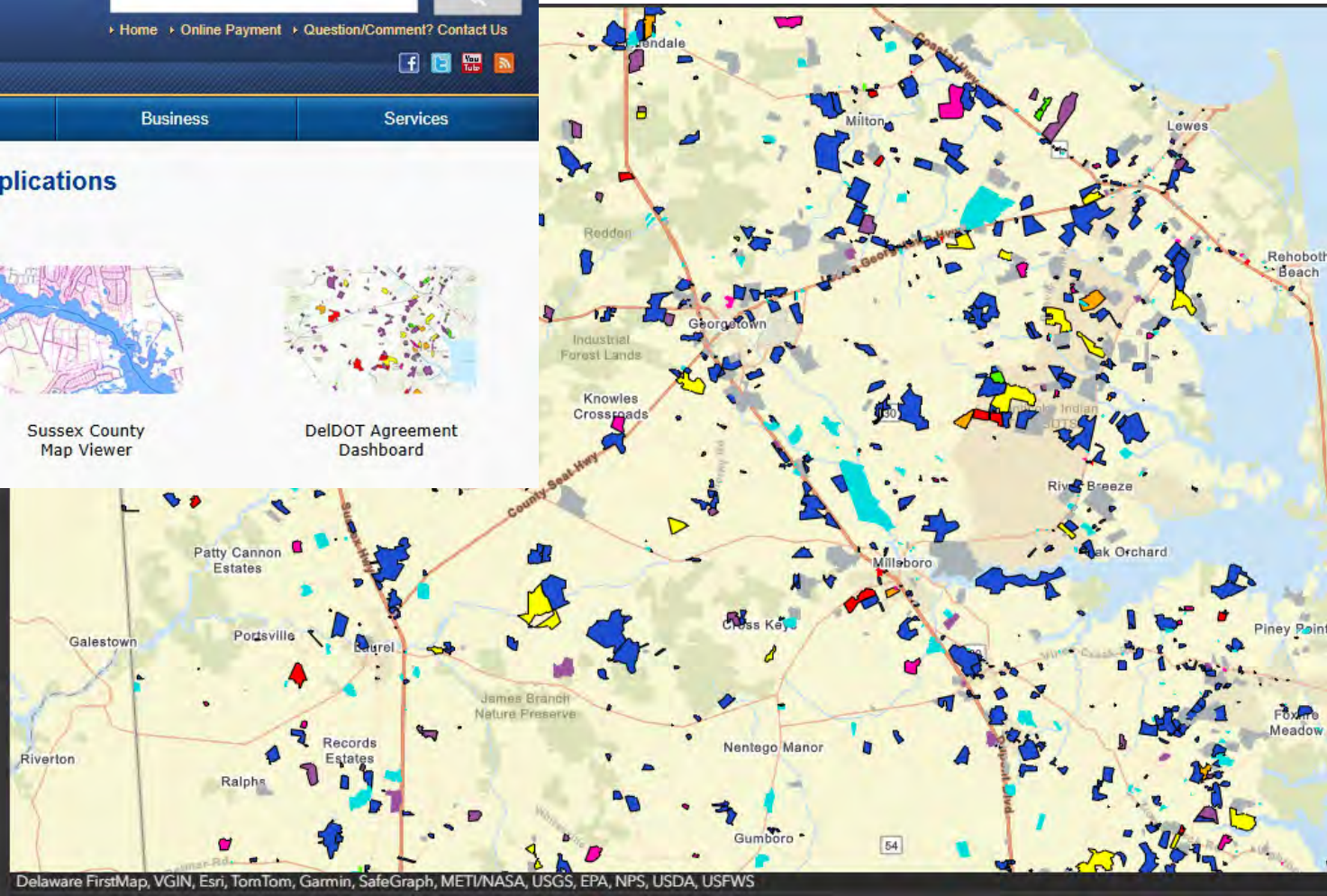
DeIDOT Agreement
Dashboard

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



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

Transportation

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

Total Land Area

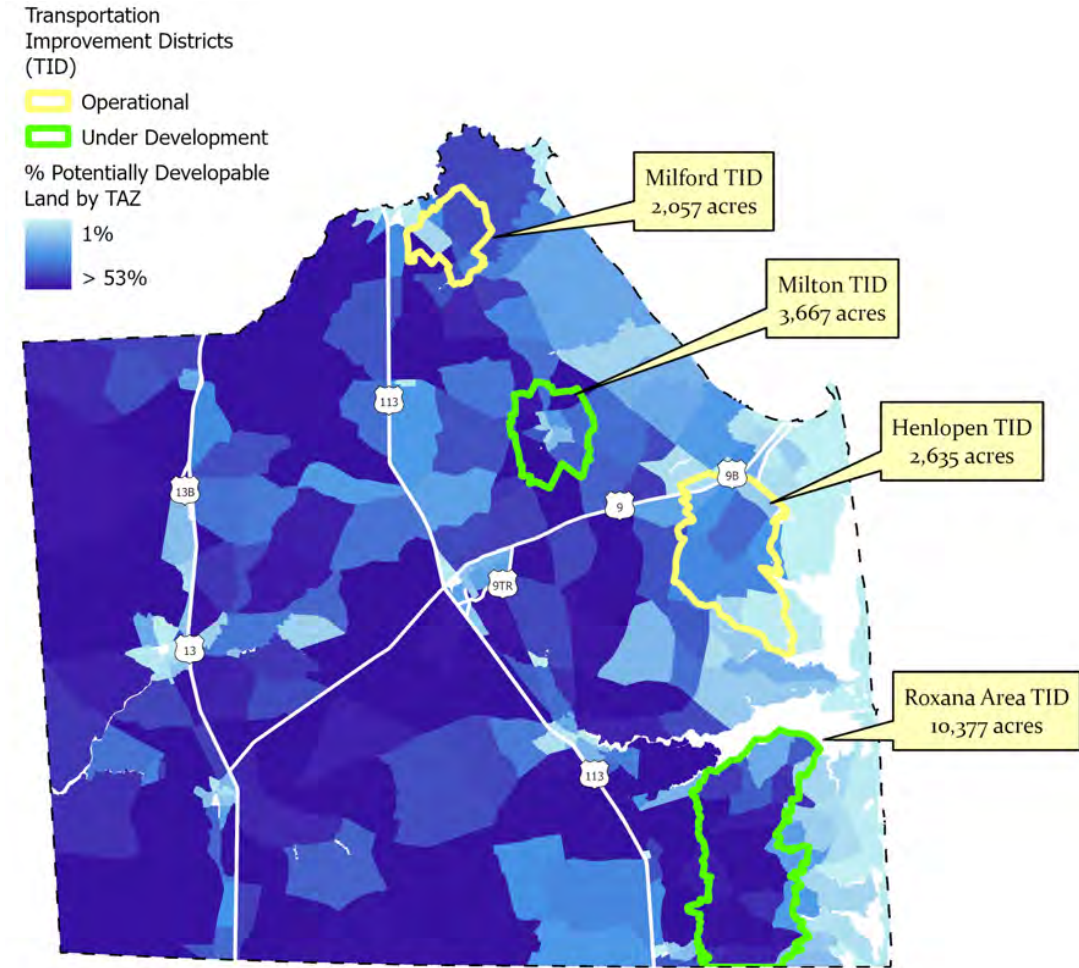
—

- 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

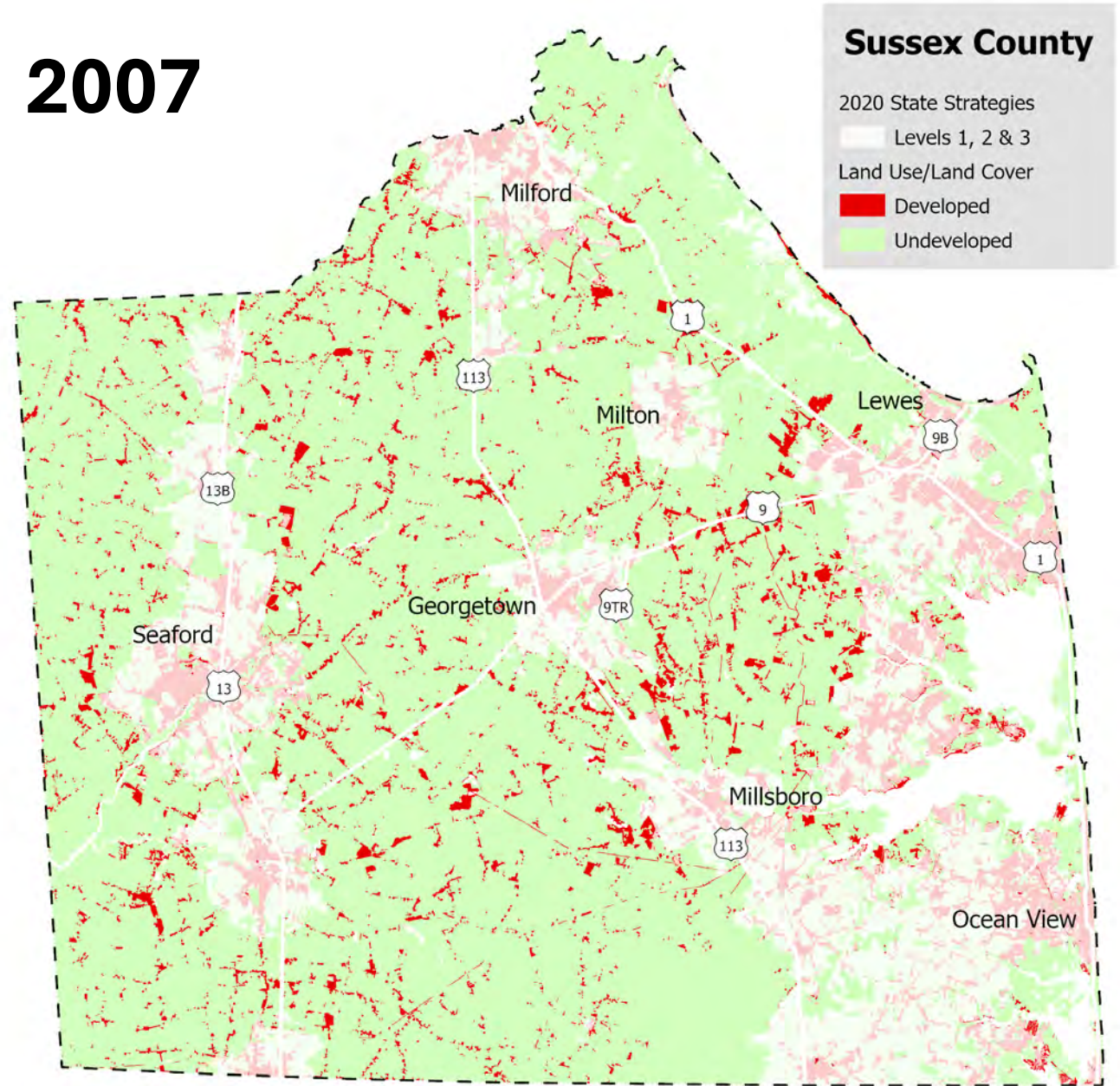
Percent of land developable (estimated by TAZ)



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

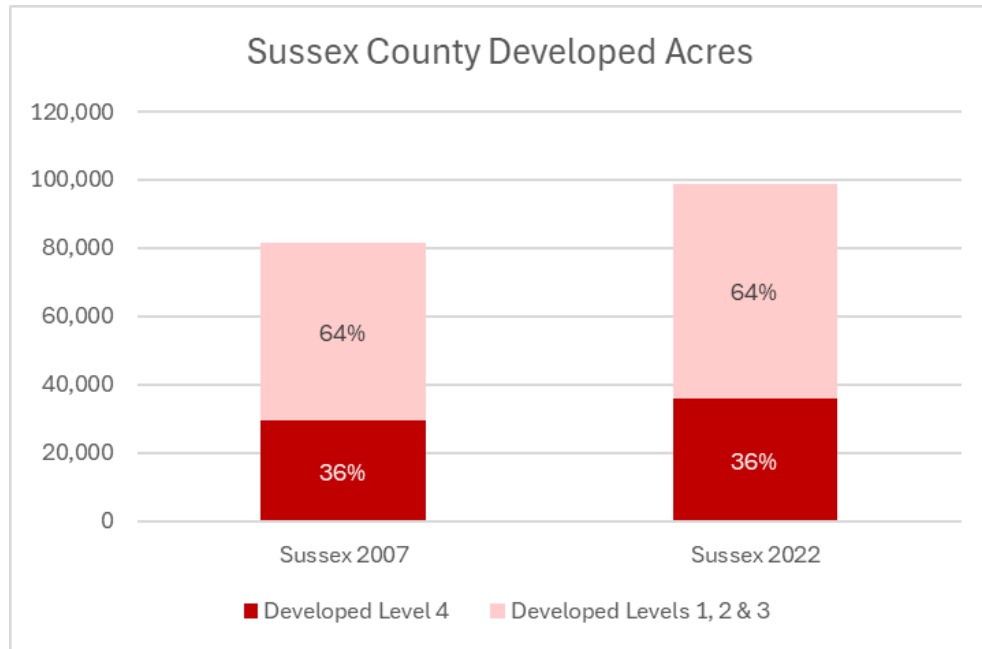
Developed Land

2007

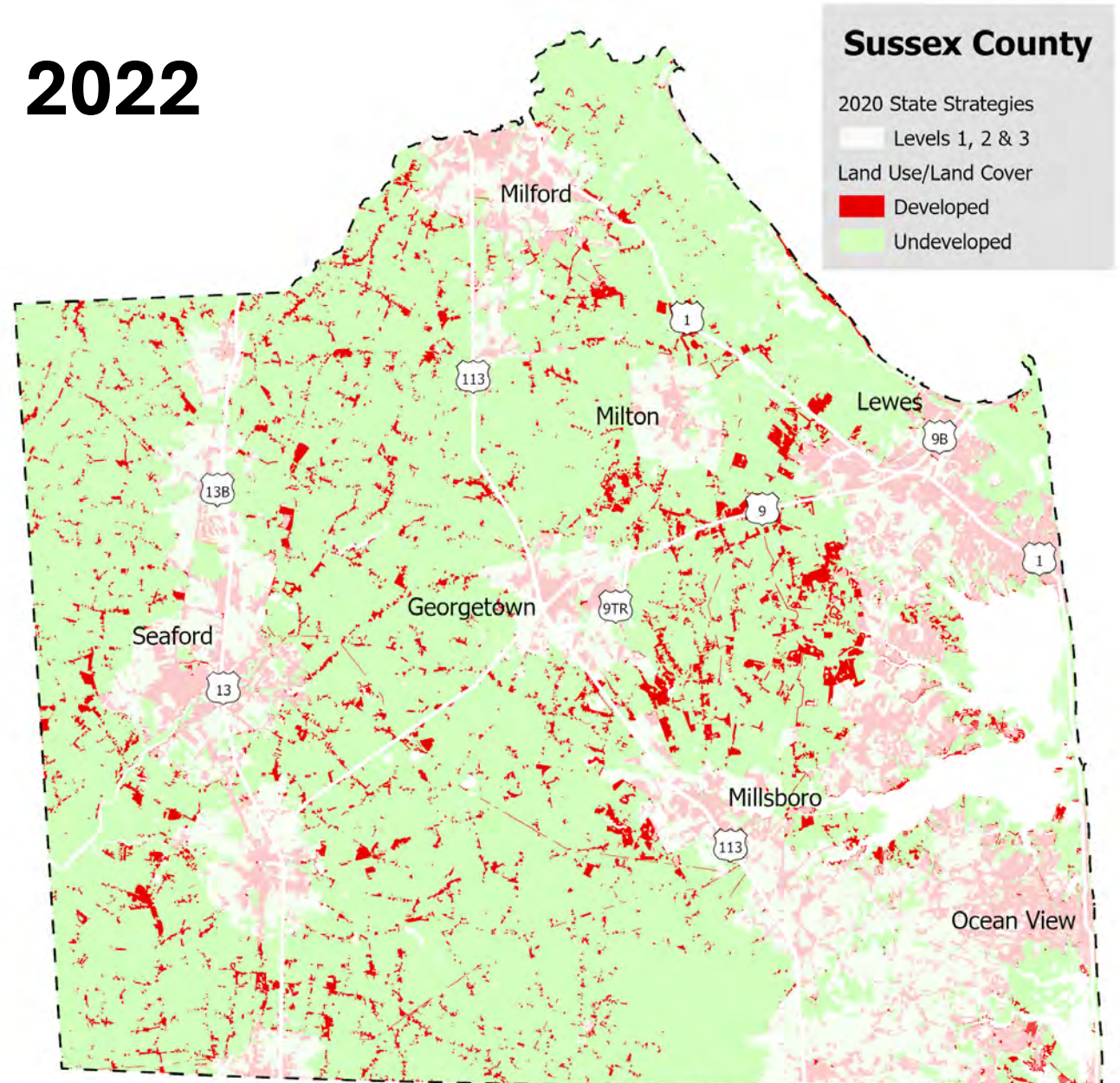


Developed Land

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

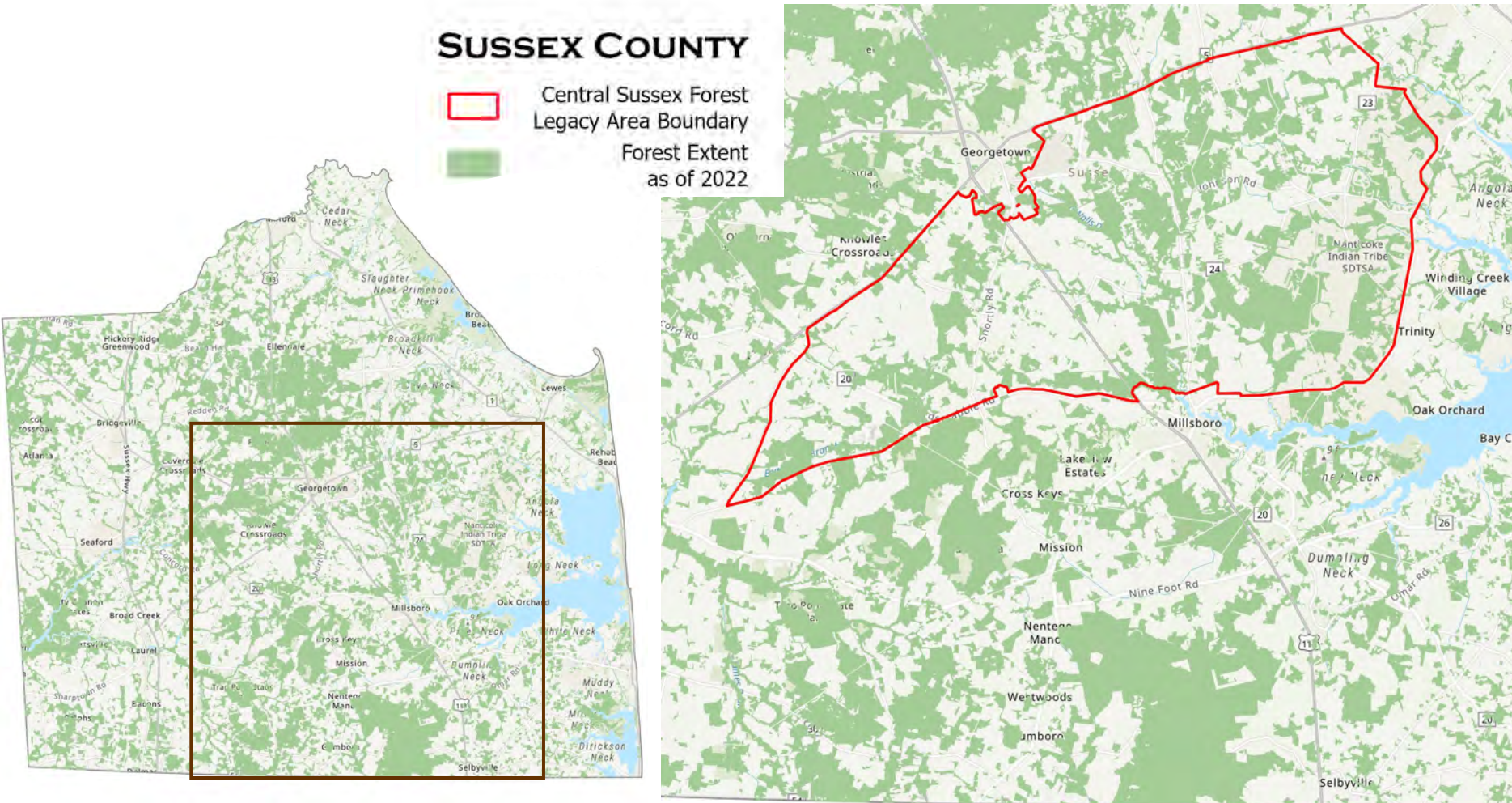


2022



Environment – Land / Resources at Risk

Delaware Statewide Forest Strategy



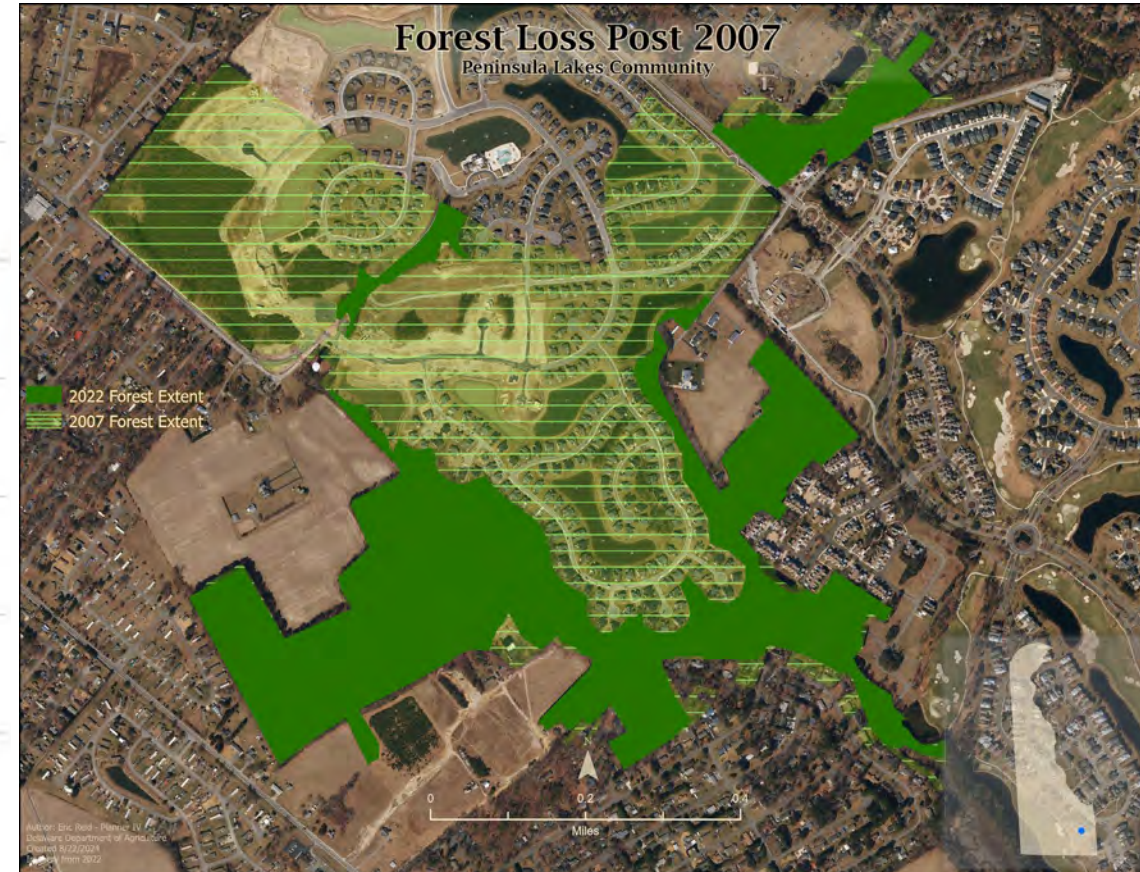
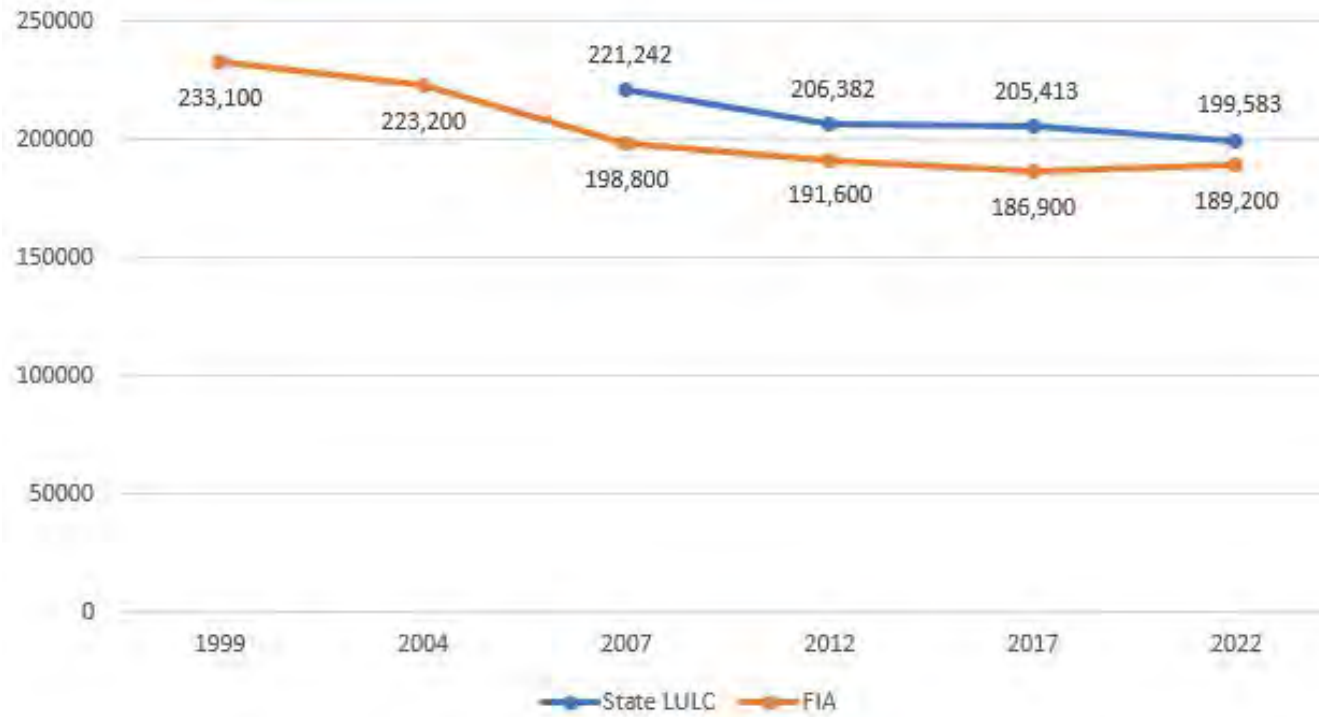
First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands

Environment – Land / Resources at Risk

Total Forest Acres by Year, Sussex County



Land Use Land Cover data

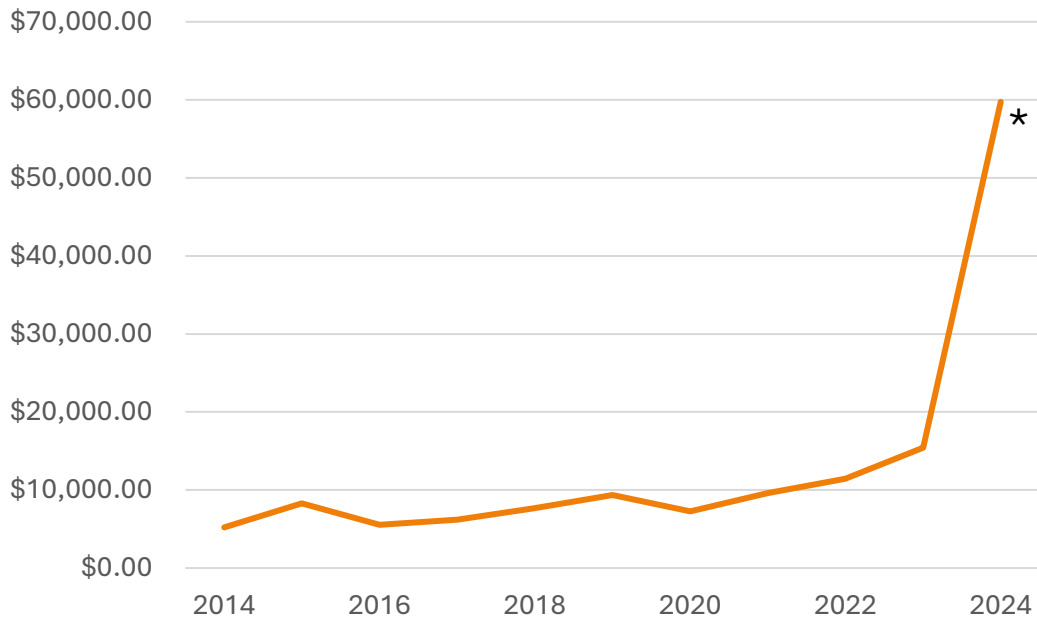
LULC – Land Use Land Cover

FIA - Forest Inventory and Analysis

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

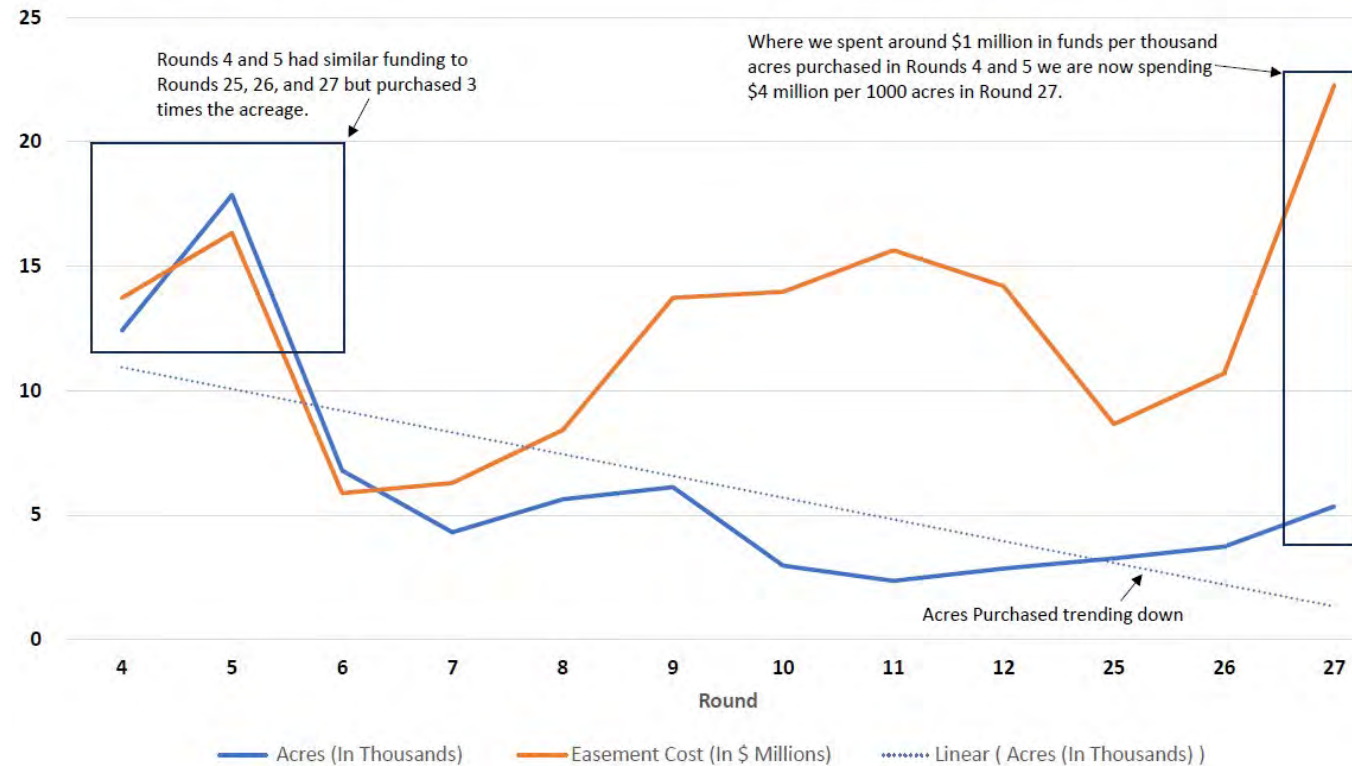
Environment – Preservation Efforts and Challenges

Open Space Preservation - Price per acre



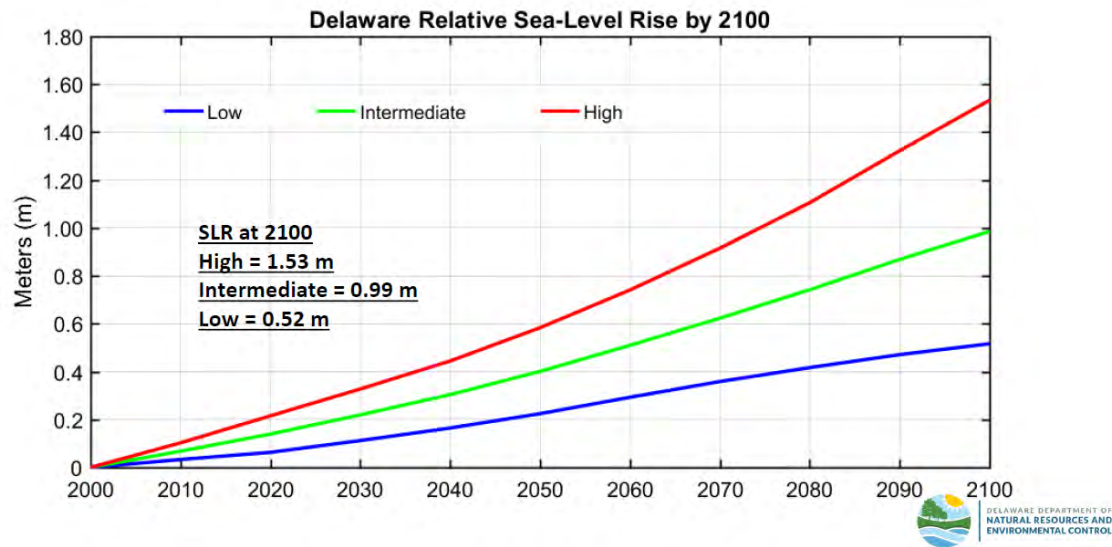
*Note: Price spike in 2023 and 2024 due to a key 285-acre land purchase adjacent to White Clay Creek State Park.

Agricultural Land Preservation Program – Acres Purchased vs. Funds Spent

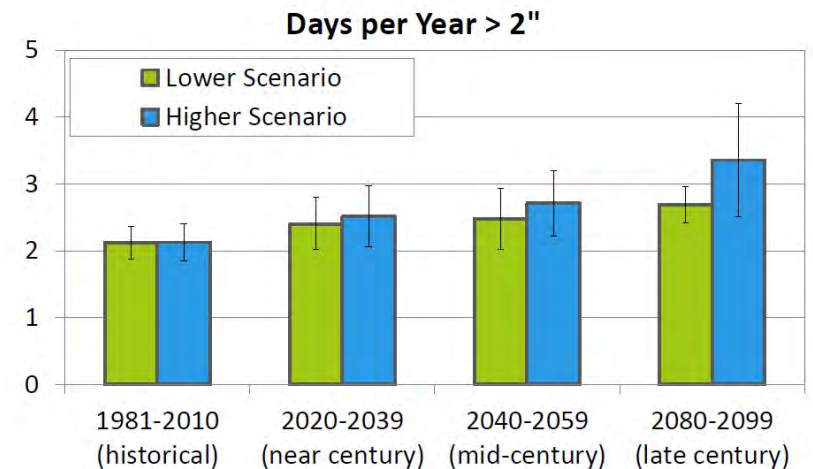


Environment – Resiliency and Adaptation

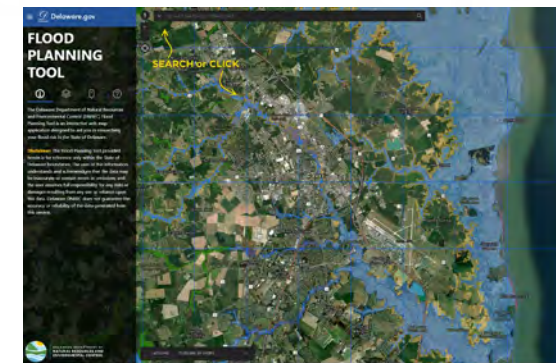
Sea Levels will continue to rise



Days with very heavy precipitation are expected to increase



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



Economy – Industry and Economic Development

Current industries:

Delaware total jobs: 625,328

Sussex County total jobs: 128,504

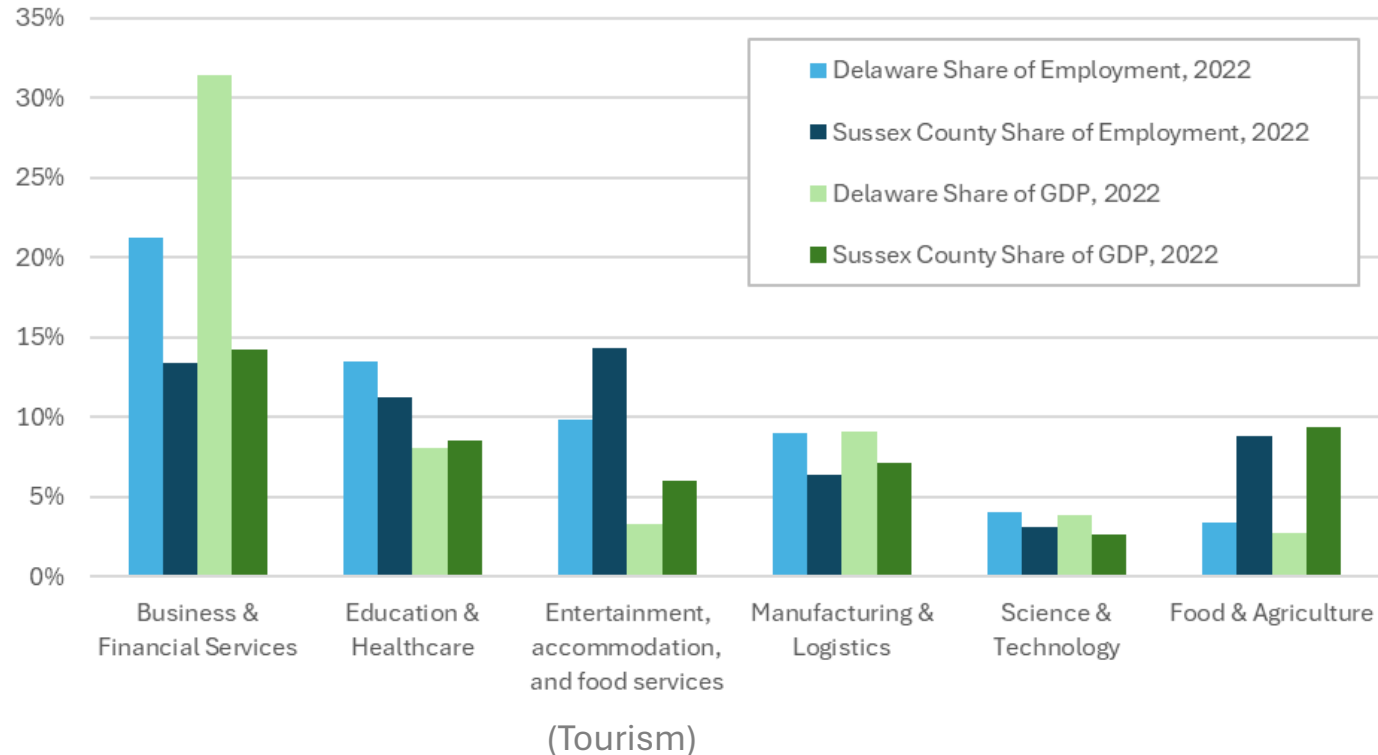
Delaware total GDP: \$90.4 billion

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?

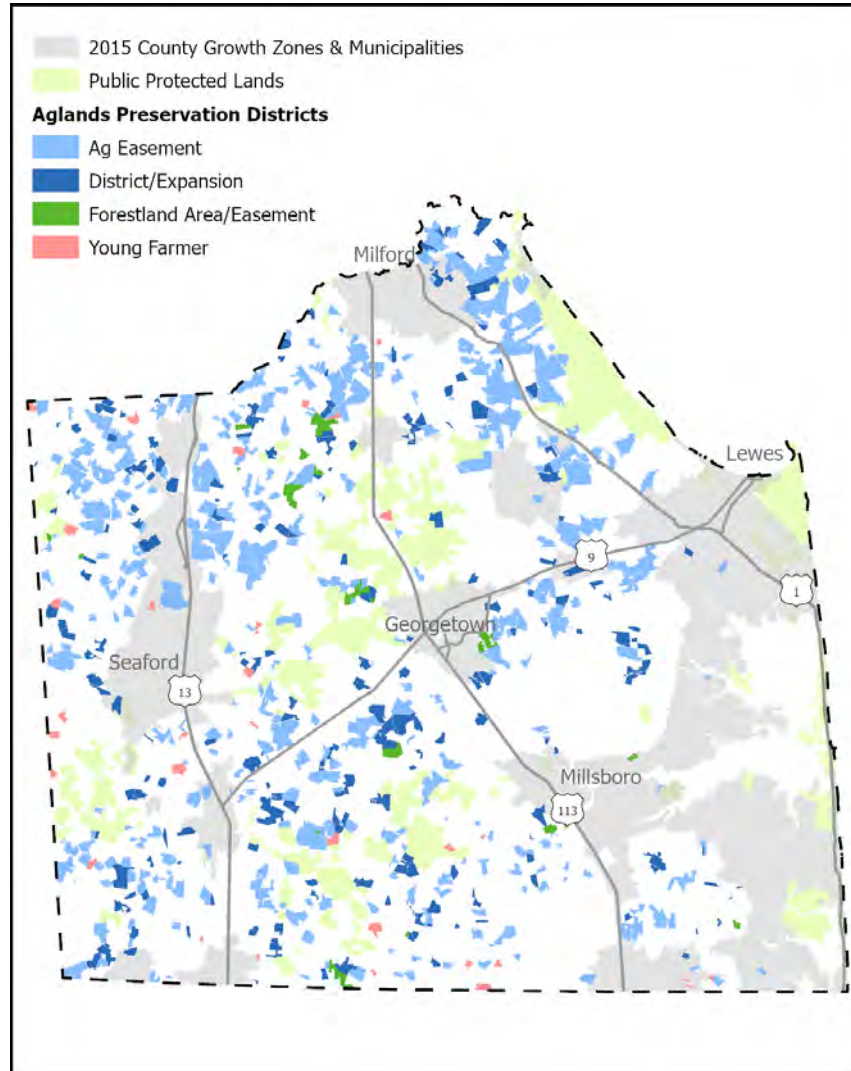
Key Economic Sectors in Delaware and Sussex County



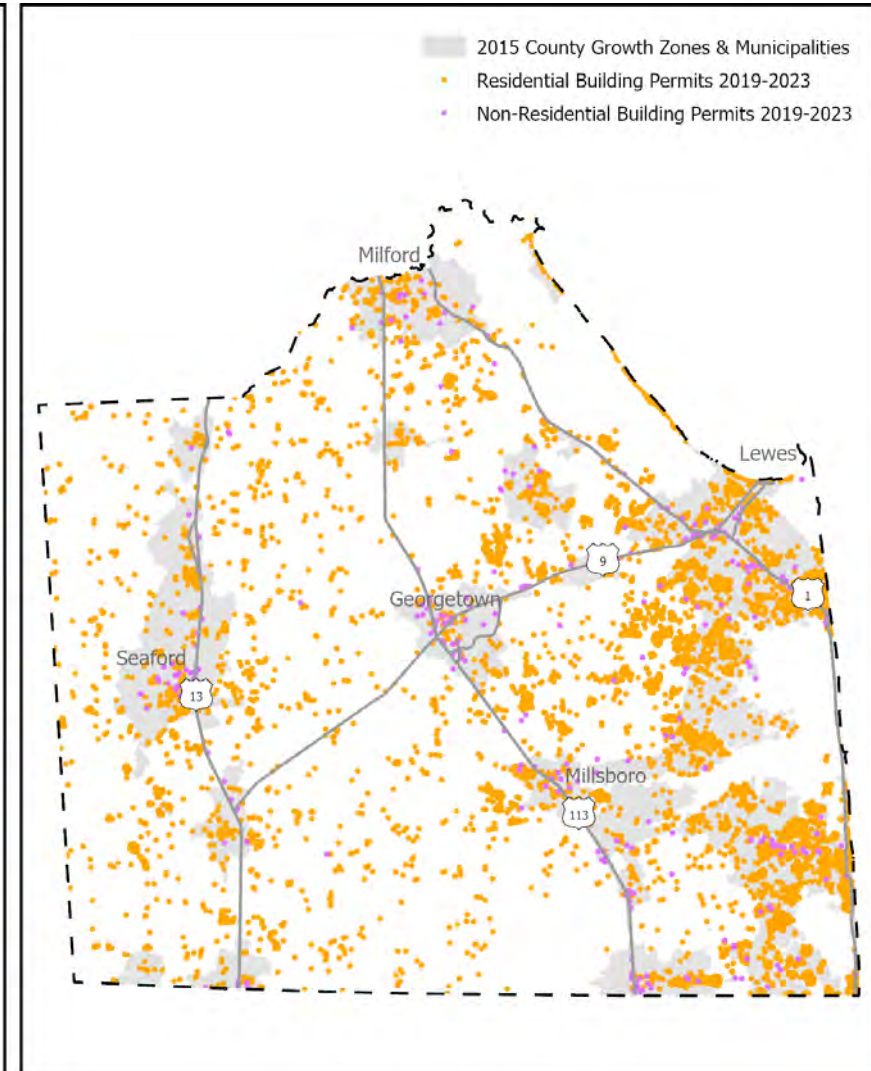
Economy – Concerns

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

Land Preservation (through Oct 2024)

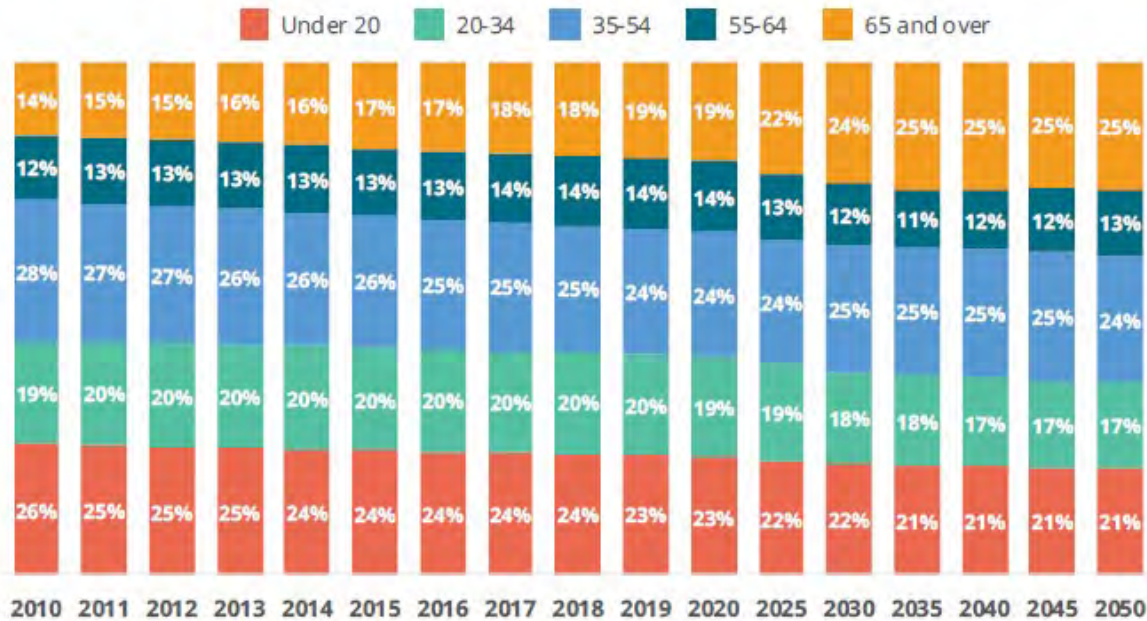


Development (building permits, 2019-2023)



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.

 *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.*

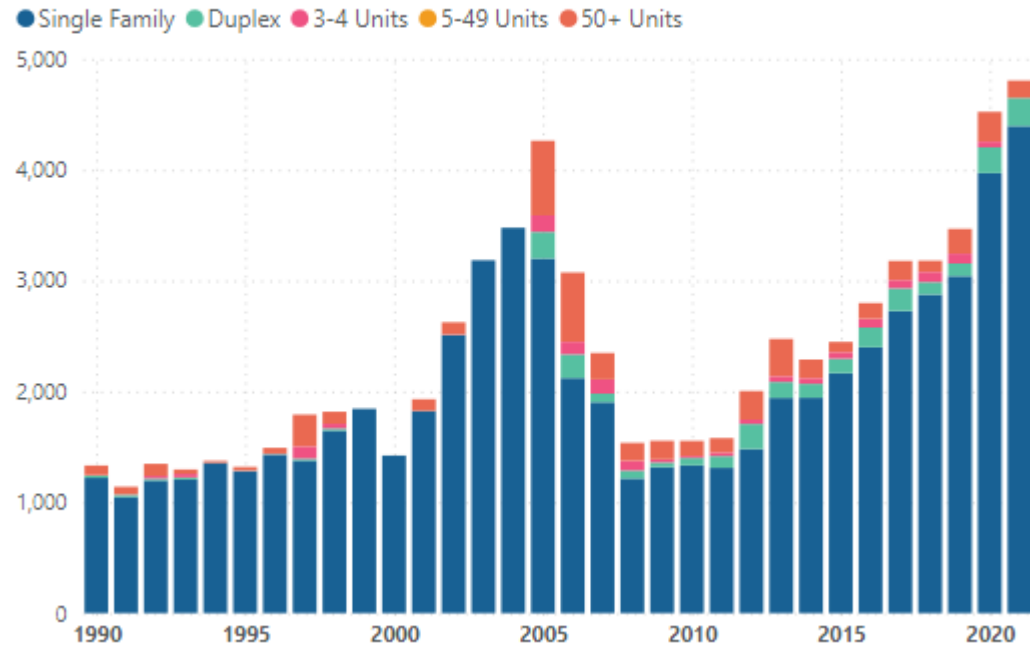
Housing



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 – Sussex County

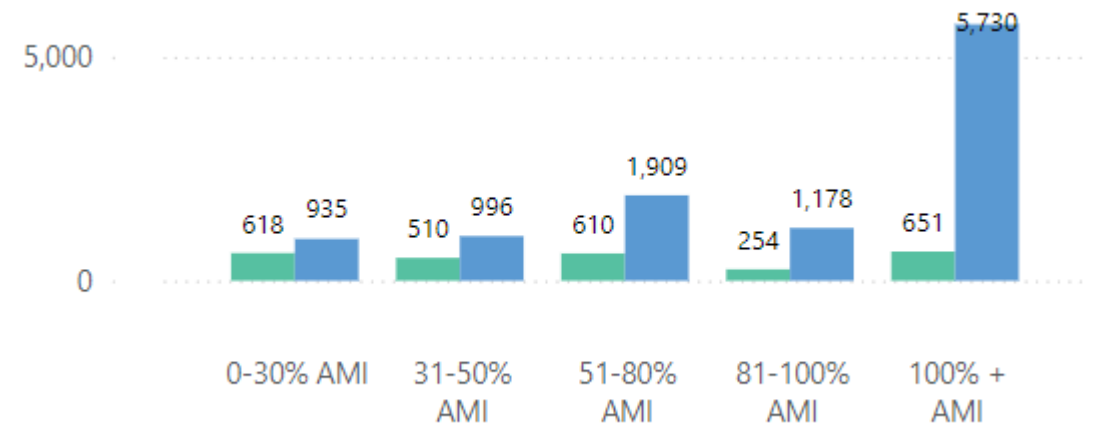
New Units Permitted by Structure Type, 1990-2021
Sussex County



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

● Rental Units Needed ● Ownership Units Needed

Total: 13,392 needed, of which:

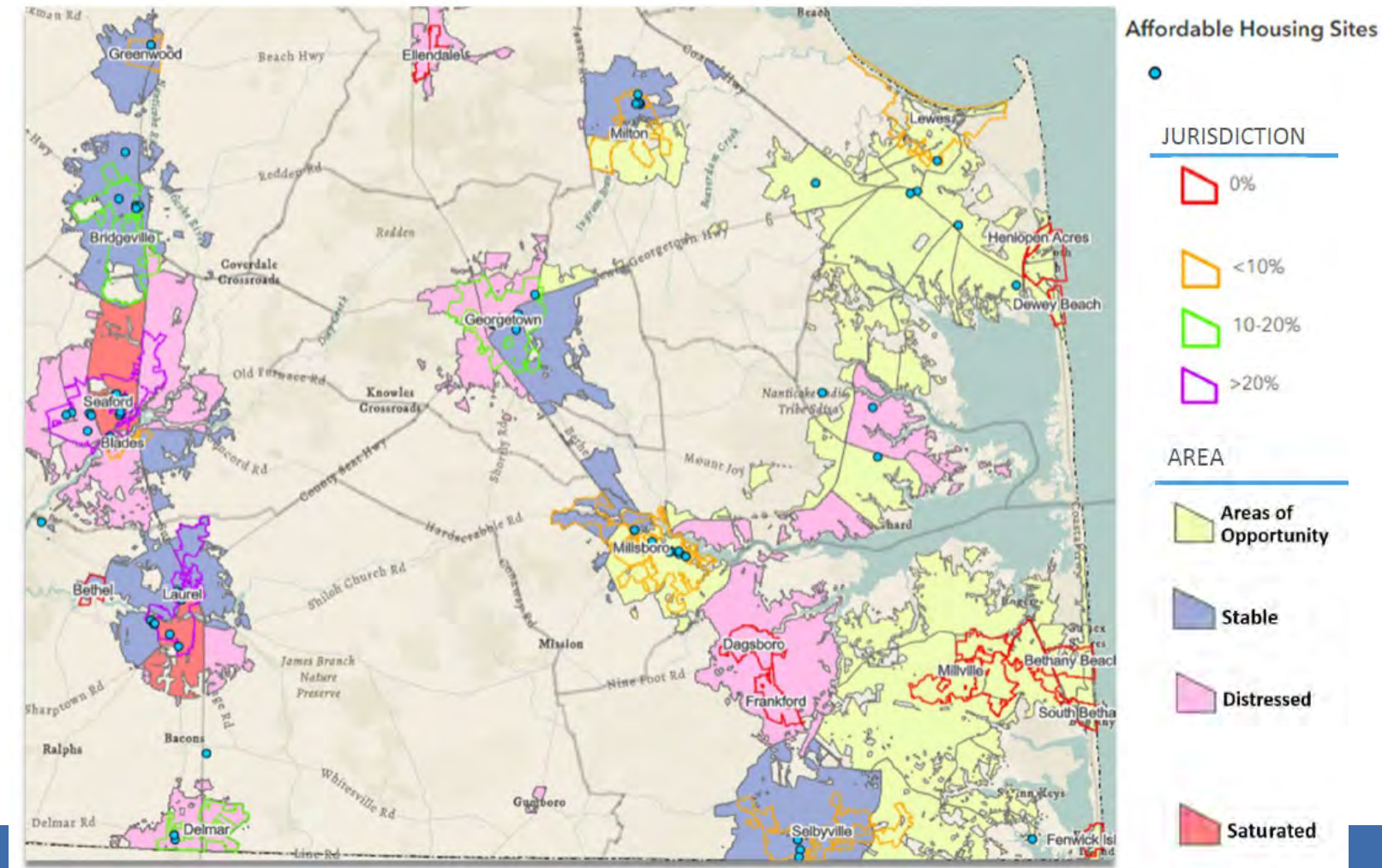
- 80% should be for homeownership
- 20% should be for renters

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

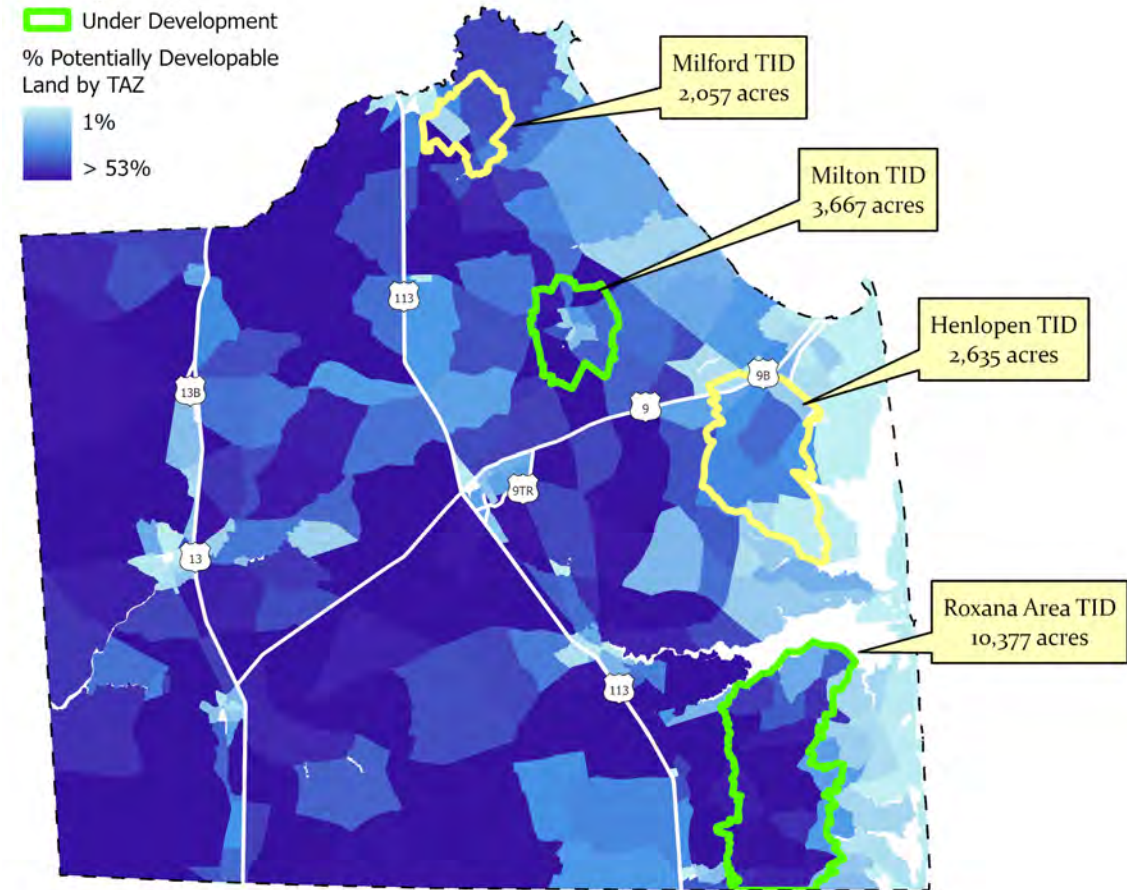
What resonates? What is your experience?

Concluding Points

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

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

Transportation Improvement Districts (TID)
 Operational
 Under Development
 % Potentially Developable Land by TAZ
 1%
 > 53%

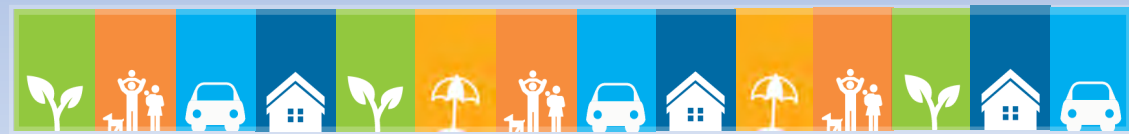


* labels show acres of potentially developable land in Levels 1, 2 and 3 in each TID



Building Collaborative Perspectives on Growth and Development

December 18, 2024



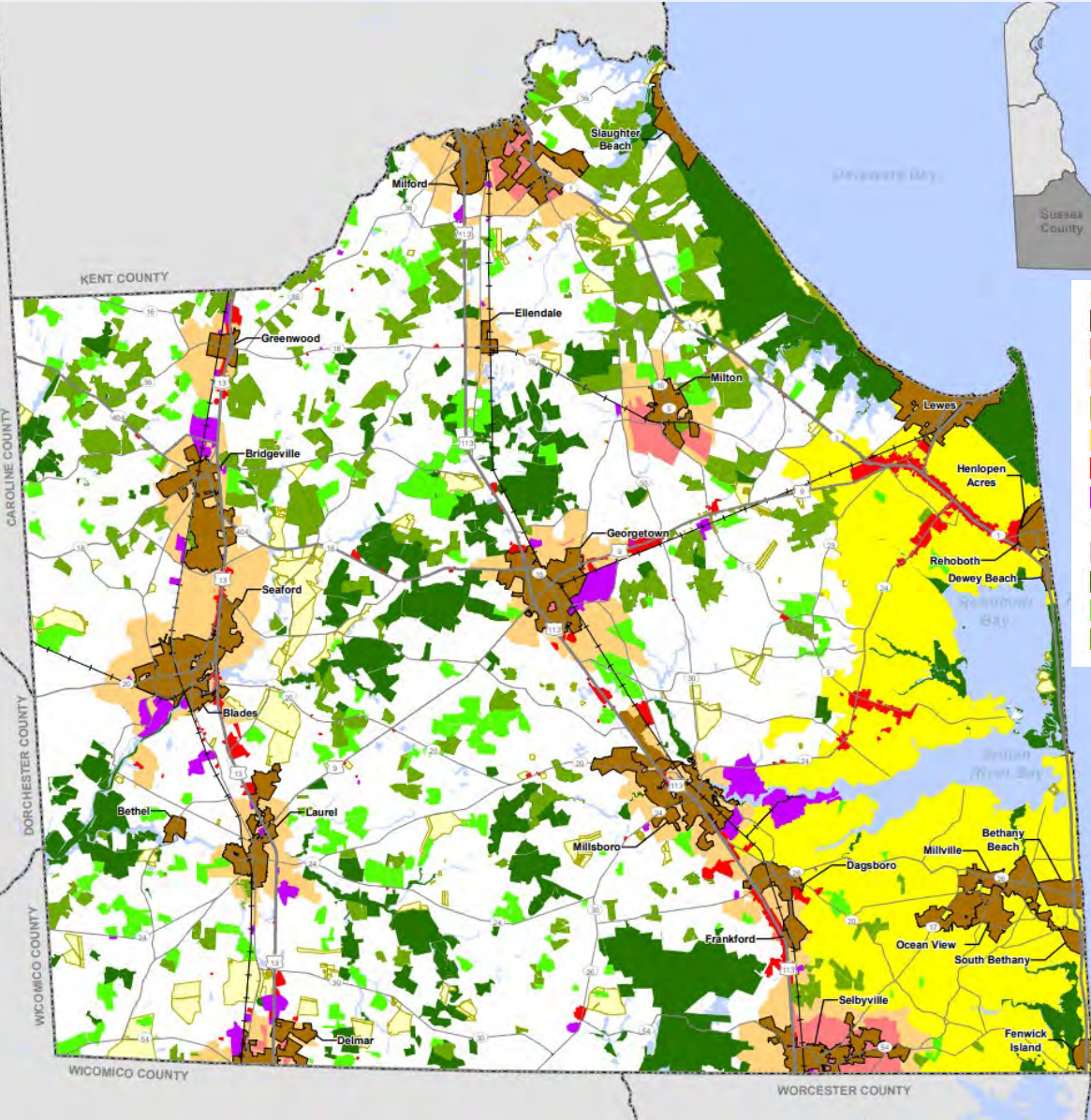
Adopted Dec 2018 and Certified March 2019



SUSSEX COUNTY COMPREHENSIVE PLAN
FINAL MARCH 2019



- Growth Areas**
- Municipalities
 - Town Center
 - Developing Area
 - Existing Development Area
 - Coastal Area
 - Commercial
 - Industrial Area
- Rural Areas**
- Low Density
 - Protected Land
 - Ag. Preservation District
 - Ag. Preservation Easement

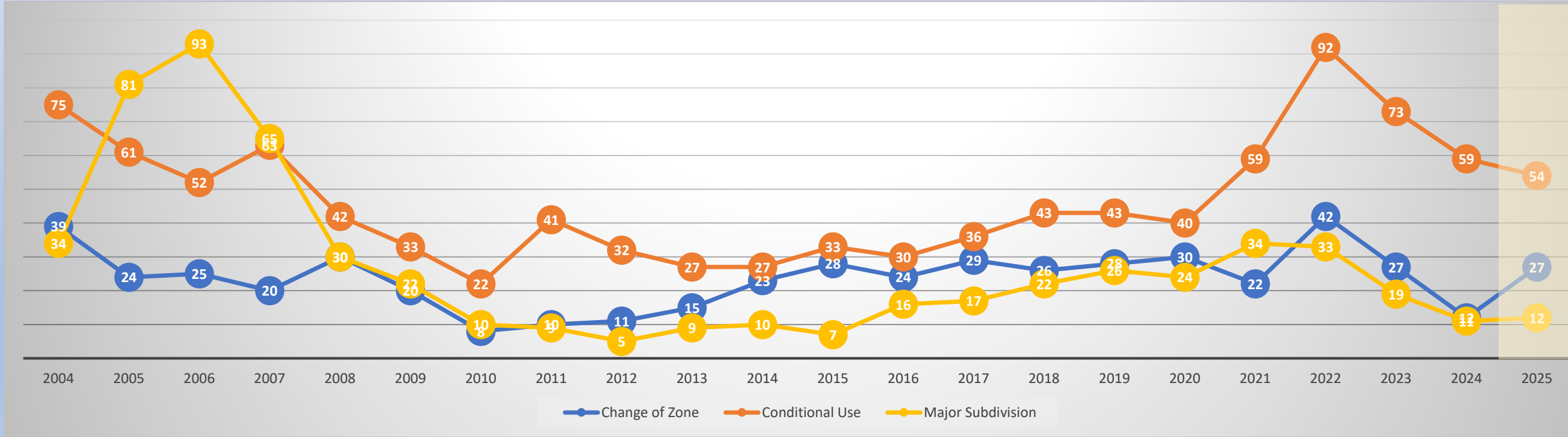


FLUM Element of Comprehensive Plan

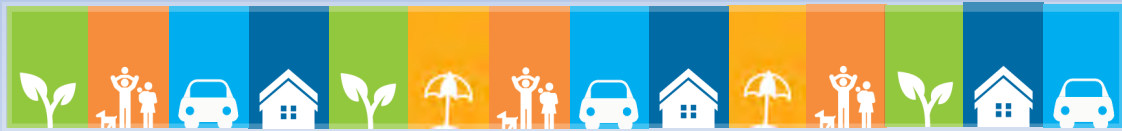




Fiscal Year	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Change of Zones	39	24	25	20	30	20	8	10	11	15	23	28	24	29	26	28	30	22	42	27	12	27
Conditional Uses	75	61	52	63	42	33	22	41	32	27	27	33	30	36	43	43	40	59	92	73	59	54
Major Subdivision 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



Development Activity





- Data Shared with State of Delaware each January
- Data for 14 of 25 municipalities included
- 14% drop in SF dwelling permits to Dec 31, 2023
- Downward trend in construction since 2021

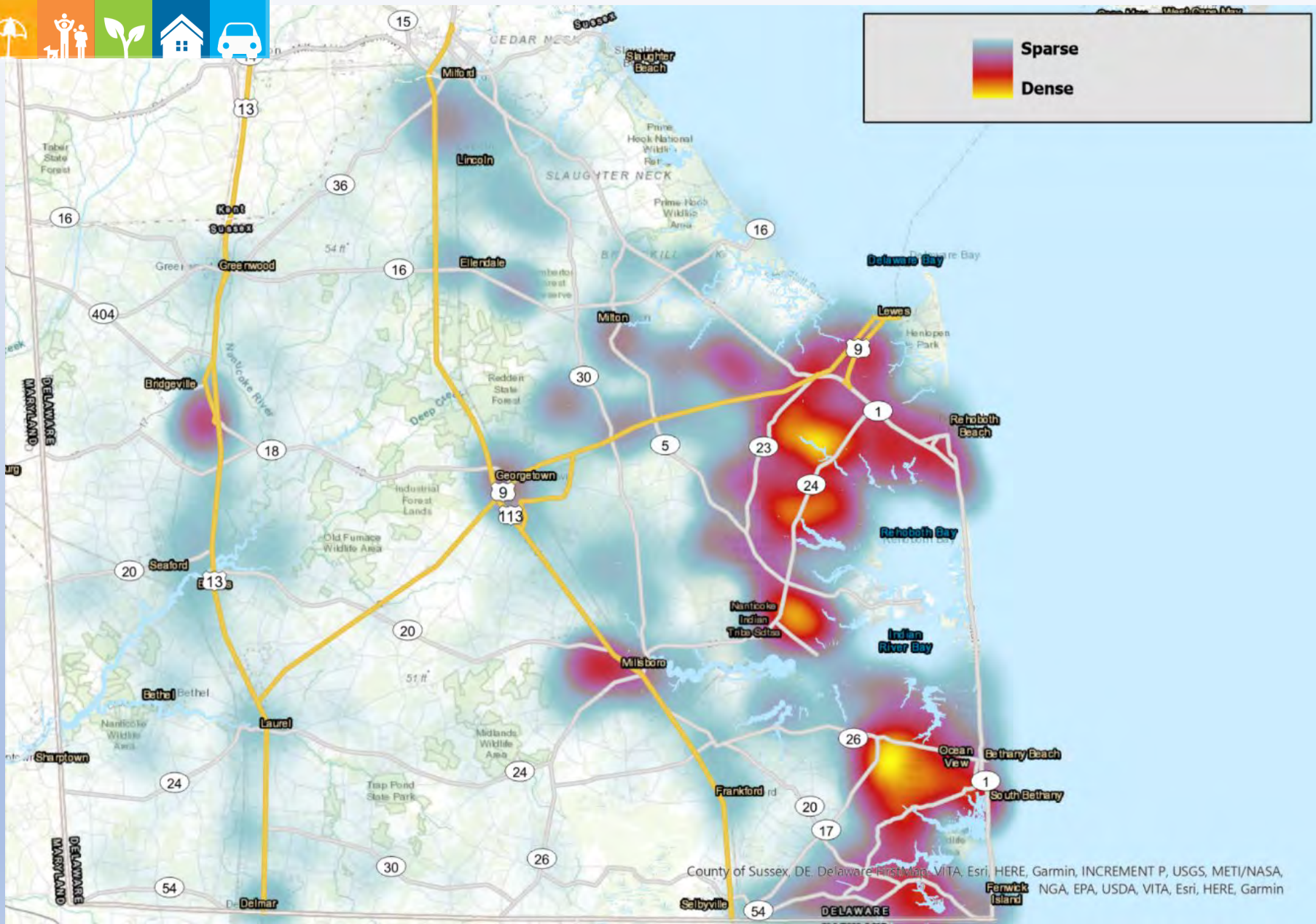


	(2023 Data)	(2022 Data)	(2021 Data)
CY 2023 Total Number Building Permits Applications Received (All including Accessory Structures, Pools)	13386	13876	14478
CY 2023 Total Number of Major Subdivision Applications Received:	13	64	26
CY 2023 Total New Major Sub Lots APPROVED in CY 2023 by P&Z Commission	1590	2019	589
CY 2023 Major Subdivision Lots Proposed to be created (i.e combined total from all Subdivision applications recvd)	2230	2459	1586
CY 2023 Total No. of multi-family building permits received:	570	561	787
CY 2023 Commercial Permits (Including Solar) (Building dimensions noted column D and E):	857	458	546
CY 2023 No. Conditional Use Applications Received:	84	101	76
CY 2023 No. Change of Zone Applications Received:	24	50	30
<u>Additional Metrics</u>			
Multi-Family Dwelling Permit Applications	570	561	787
Multi-Family Dwellings Applied for	570	908	1113
Single Family Dwelling Permits Received	3431	4029	4109
Total Number New Manufactured Homes (New for CY 23)	279	N/A	N/A
Total New Dwelling Permits Received (Single and Multi-Family)	4001	4937	5222





- 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
- DeIDOT 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

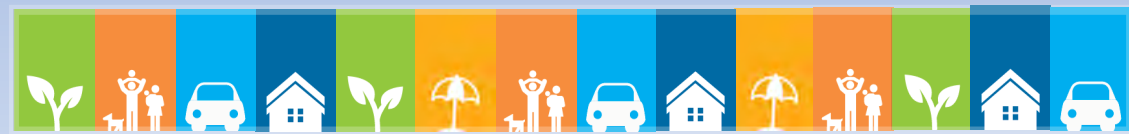
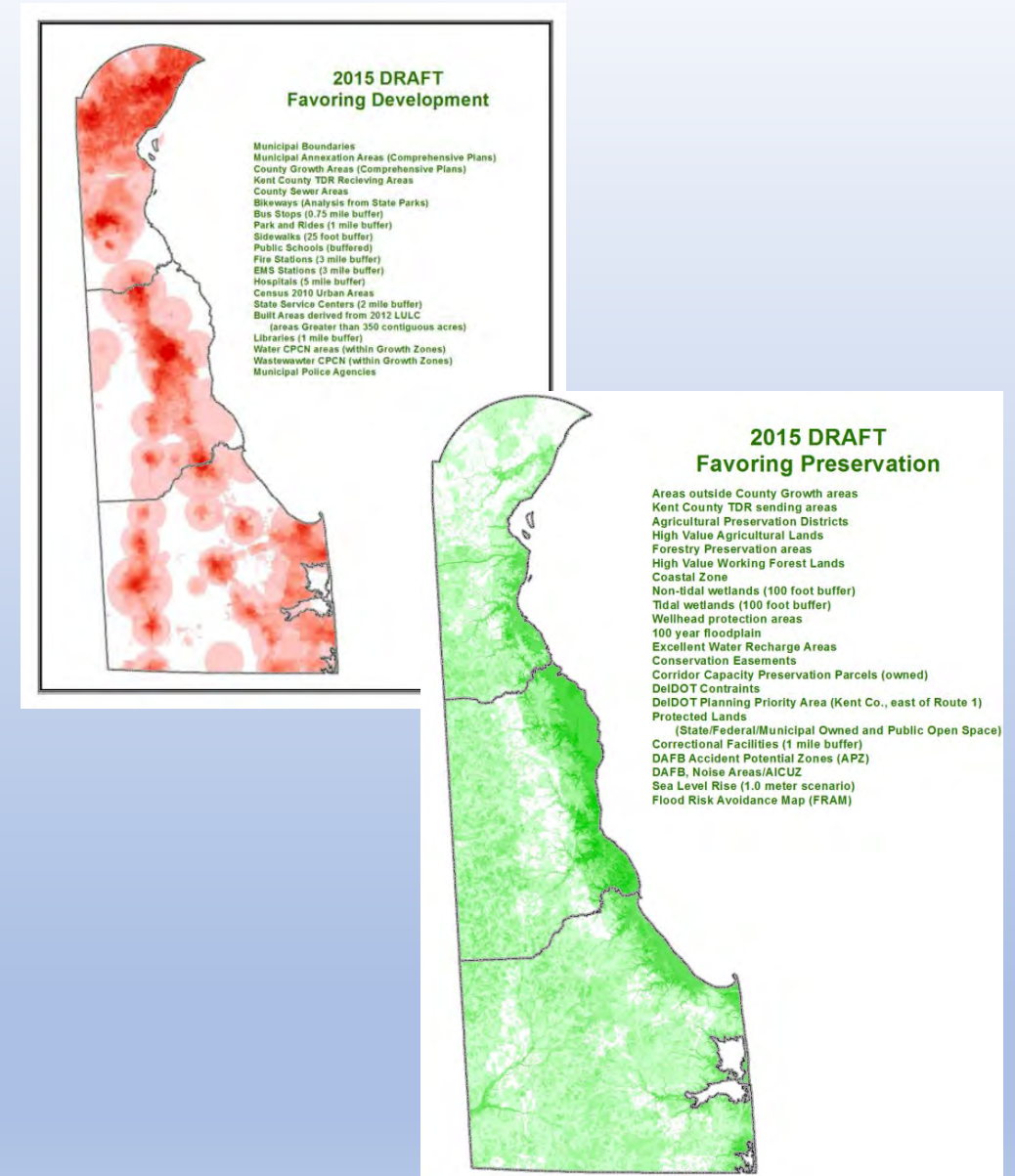
- DeIDOT Corridor Capacity
- Areas East of Route 1 in Kent County
- TDR Sending Areas
- Areas outside of designated Growth areas

Miscellaneous Protection

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

Data Sets for Out-of-play

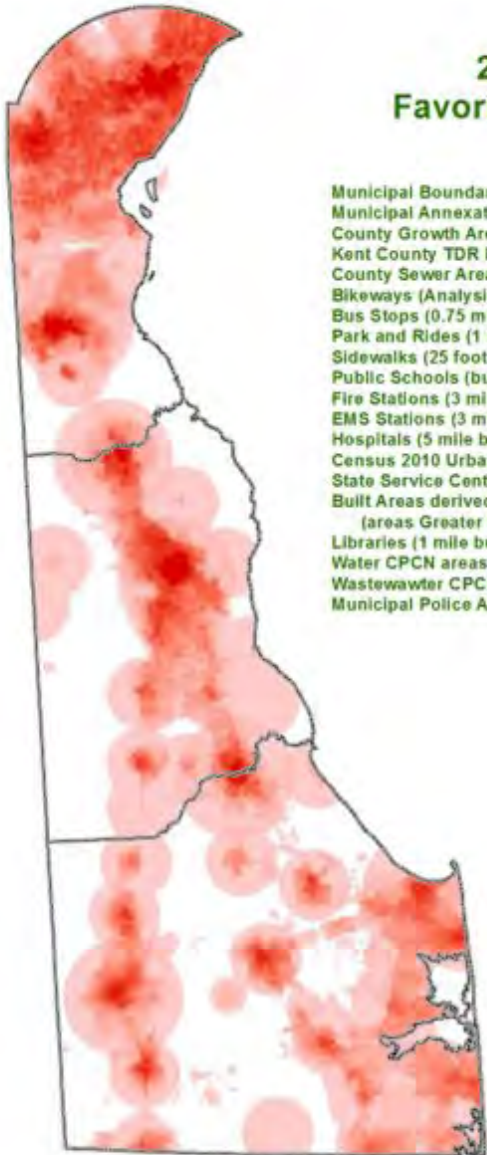
- Permanent Agricultural and Forestry Preservation and Conservation Easements
- DeIDOT Purchased Development Rights
- DeIDOT Preservation lands
- 100-Year Floodplains (New Castle and Kent County only)
- Protected Lands (federal, state, county, municipal, and dedicated public open space)
- Tidal Wetlands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





2015 DRAFT Favoring Development

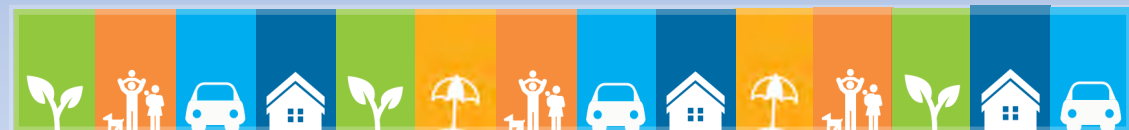
Municipal Boundaries
Municipal Annexation Areas (Comprehensive Plans)
County Growth Areas (Comprehensive Plans)
Kent County TDR Releiving Areas
County Sewer Areas
Bikeways (Analysis from State Parks)
Bus Stops (0.75 mile buffer)
Park and Rides (1 mile buffer)
Sidewalks (25 foot buffer)
Public Schools (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



Municipal Boundaries
Municipal Annexation Areas (Comprehensive Plans)
County Growth Areas (Comprehensive Plans)
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(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.





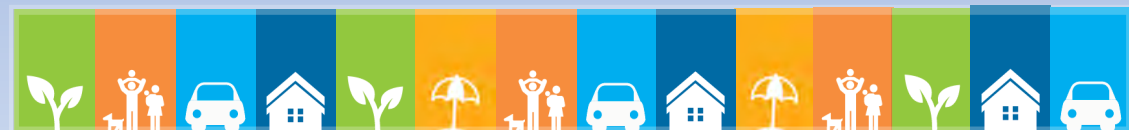
2015 DRAFT Favoring Preservation

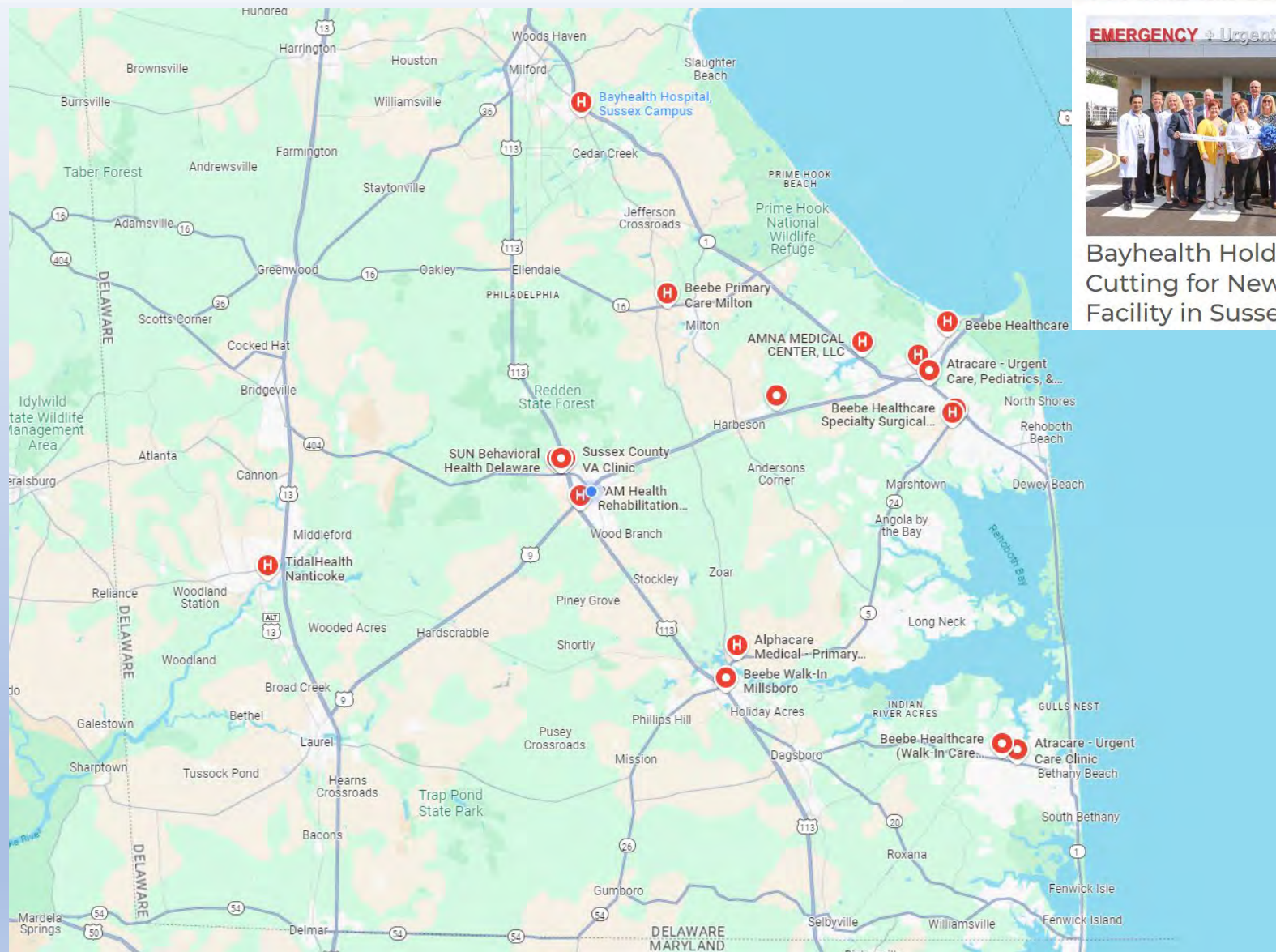
Areas outside County Growth areas
 Kent County TDR sending areas
 Agricultural Preservation Districts
 High Value Agricultural Lands
 Forestry Preservation areas
 High Value Working Forest Lands
 Coastal Zone
 Non-tidal wetlands (100 foot buffer)
 Tidal wetlands (100 foot buffer)
 Wellhead protection areas
 100 year floodplain
 Excellent Water Recharge Areas
 Conservation Easements
 Corridor Capacity Preservation Parcels (owned)
 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)

Areas outside County Growth areas
 Kent County TDR sending areas
 Agricultural Preservation Districts
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 Flood Risk Avoidance Map (FRAM)

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Bayhealth Holds Ribbon Cutting for New Total Care Facility in Sussex County

Beebe relocates walk-in care site to new hospital

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

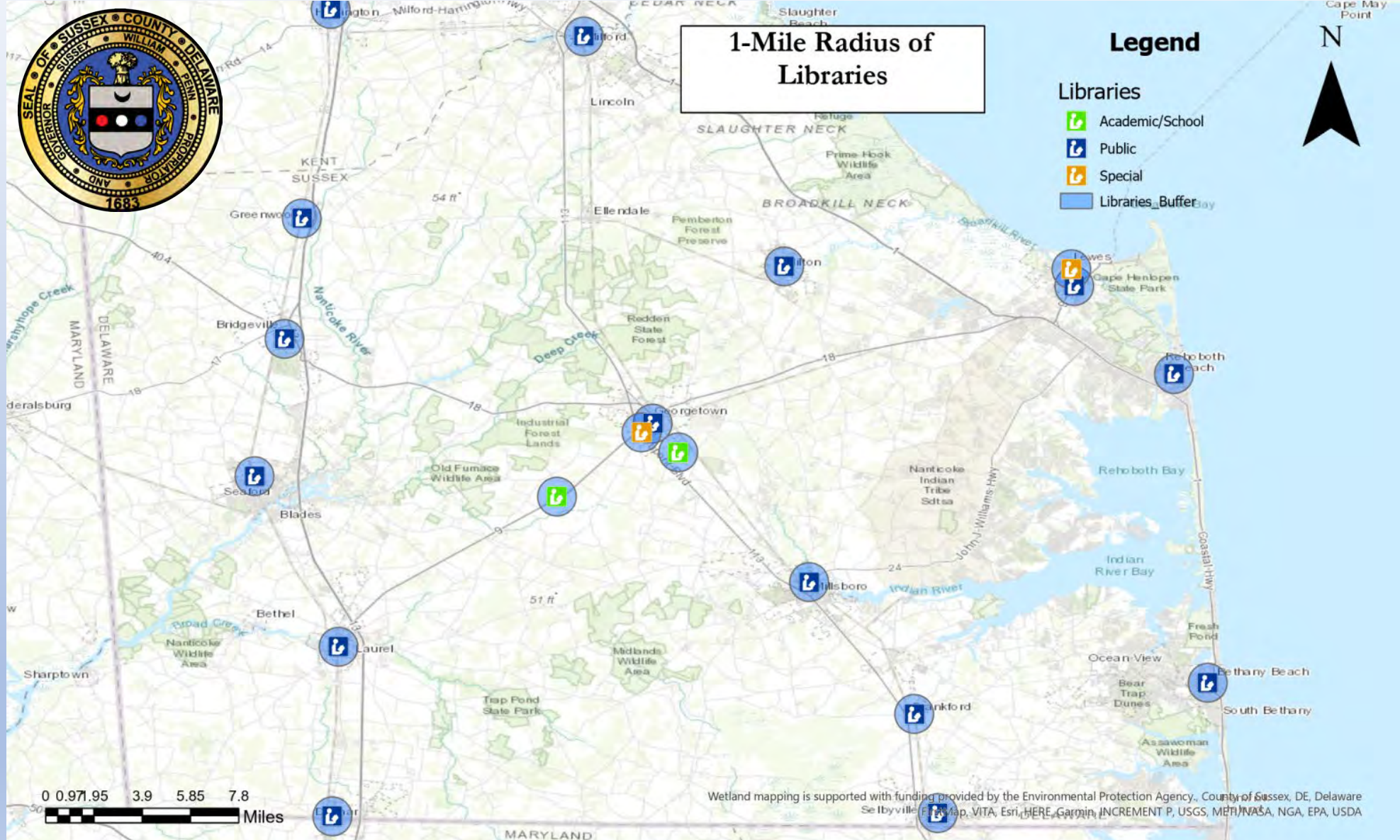


Beebe Healthcare staff and officials gather June 9 to cut a ribbon to open the Rehoboth area walk-in care center at the new Beebe Healthcare Specialty Surgical Center. RON MACARTHUR PHOTOS
By Ron MacArthur • June 13, 2022

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

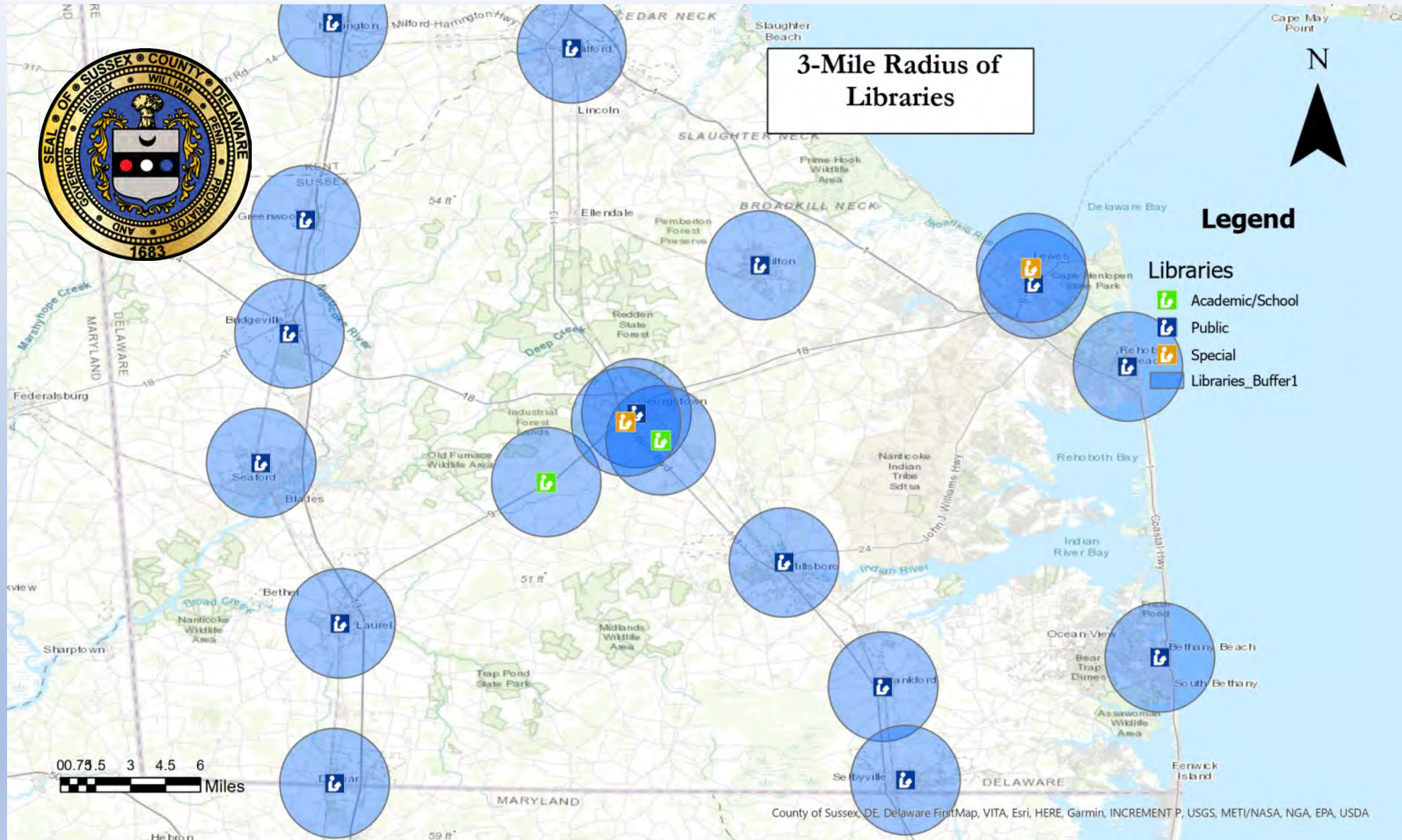
New Hospitals and Walk-In Facilities Since 2020



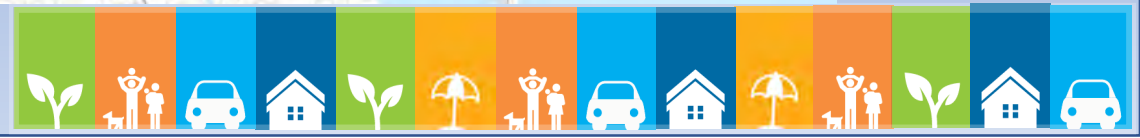


Libraries – Current 1-mile buffer



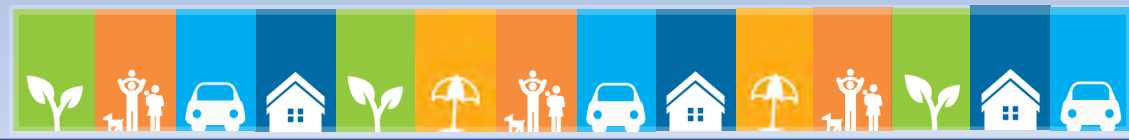


Libraries 3-mile buffer



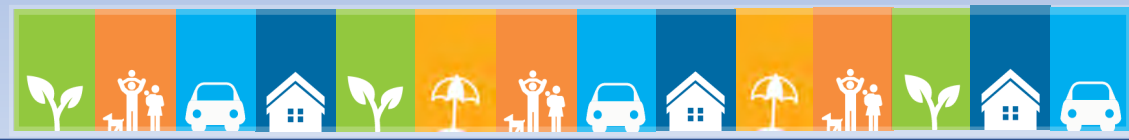


Questions?



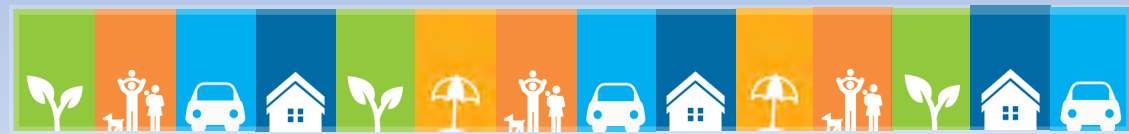


Questions?



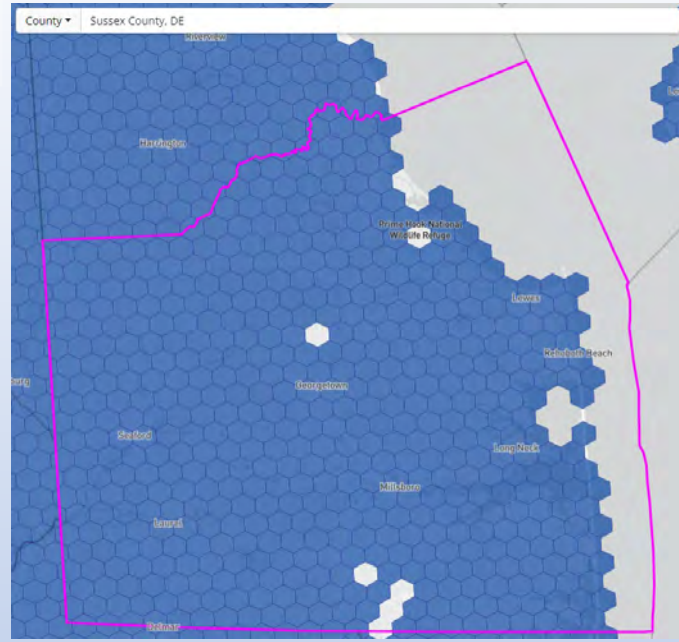


Additional Slides

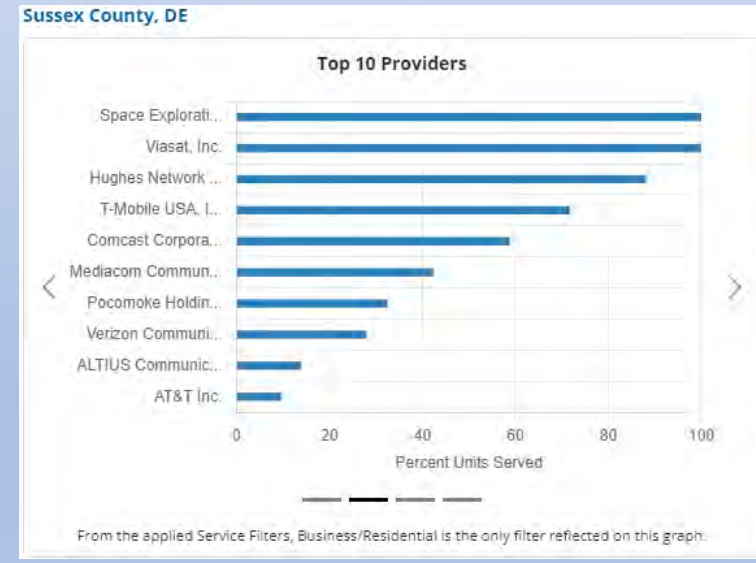
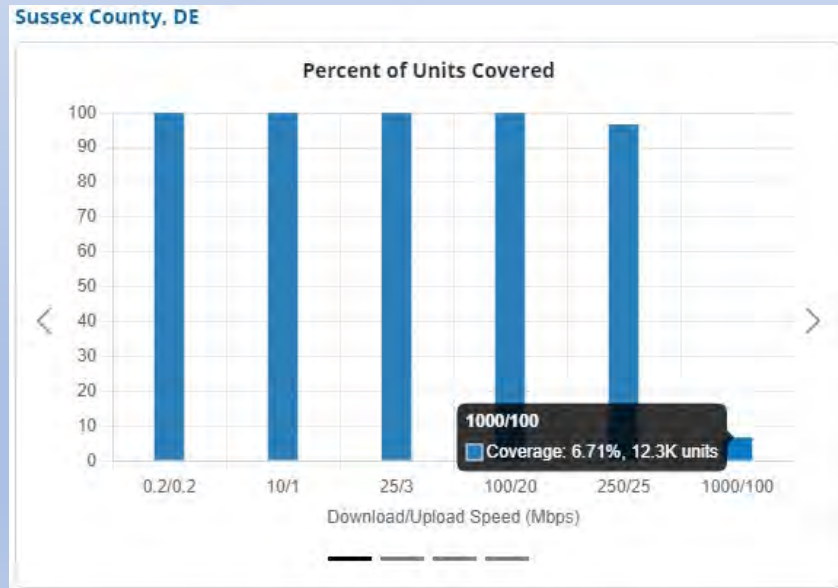




Fiber Optic Availability in Kent and Sussex Counties, Delaware



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

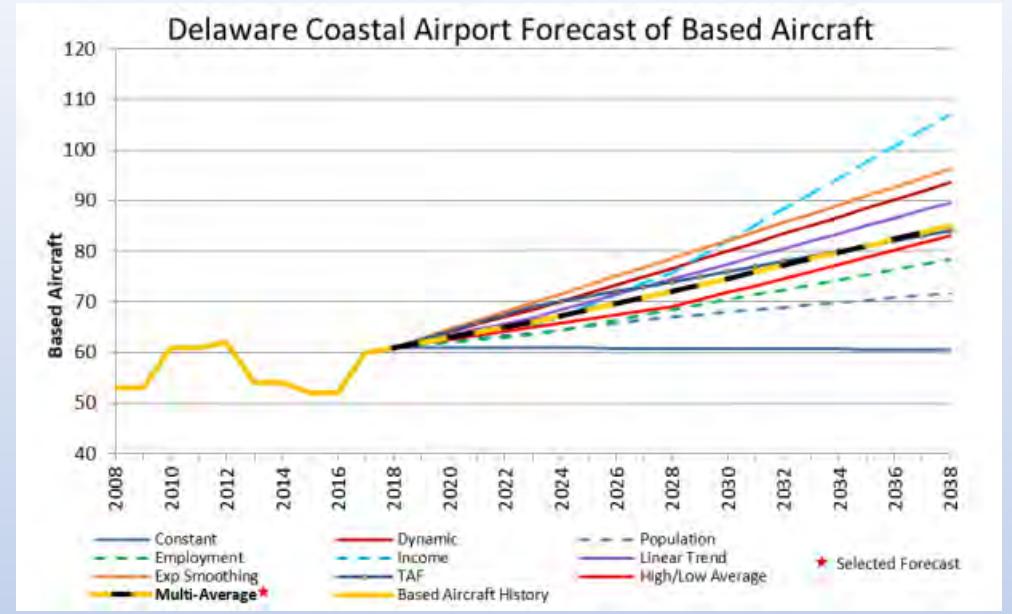
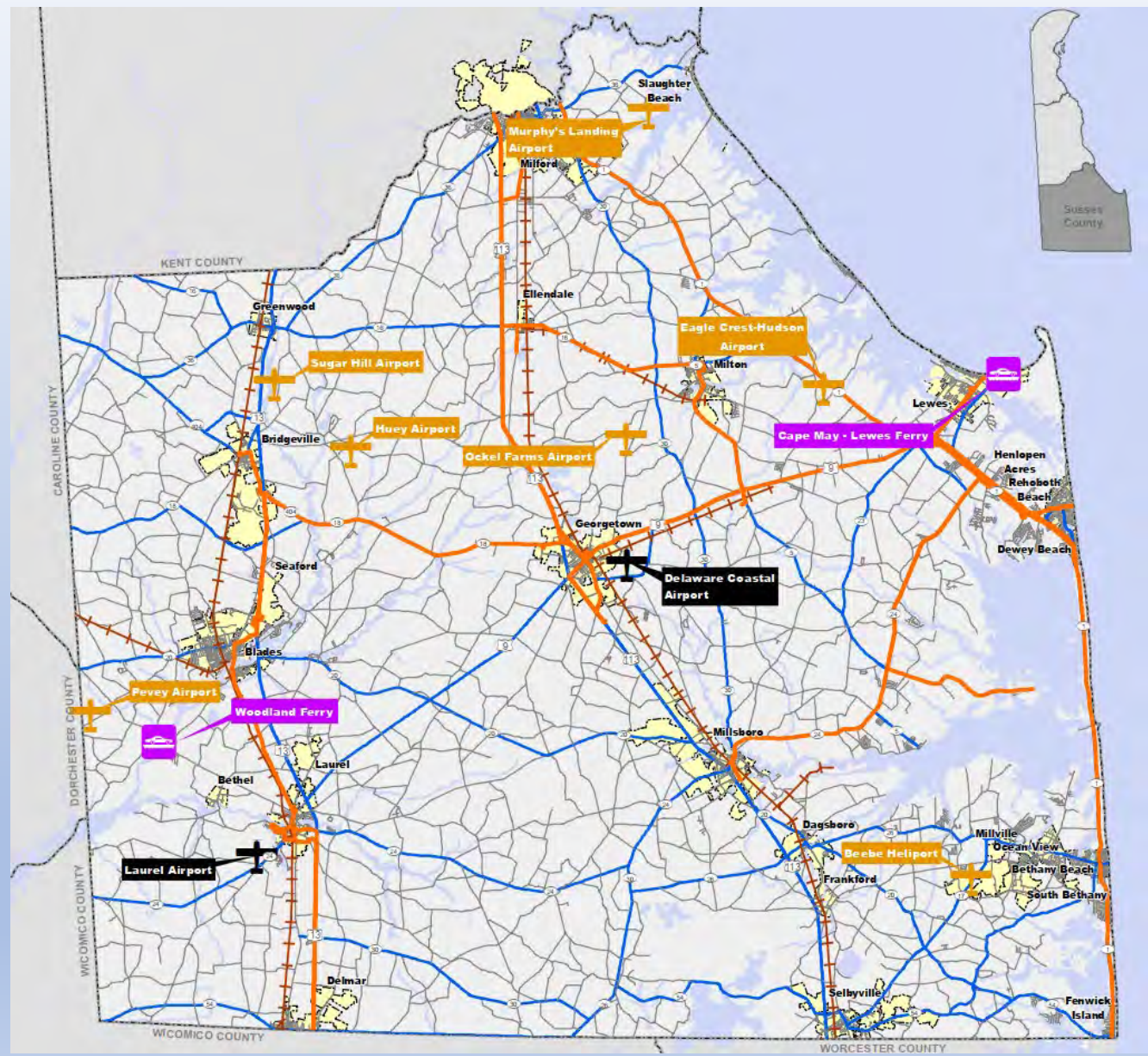


Source: FCC National Broadband Map (by County)

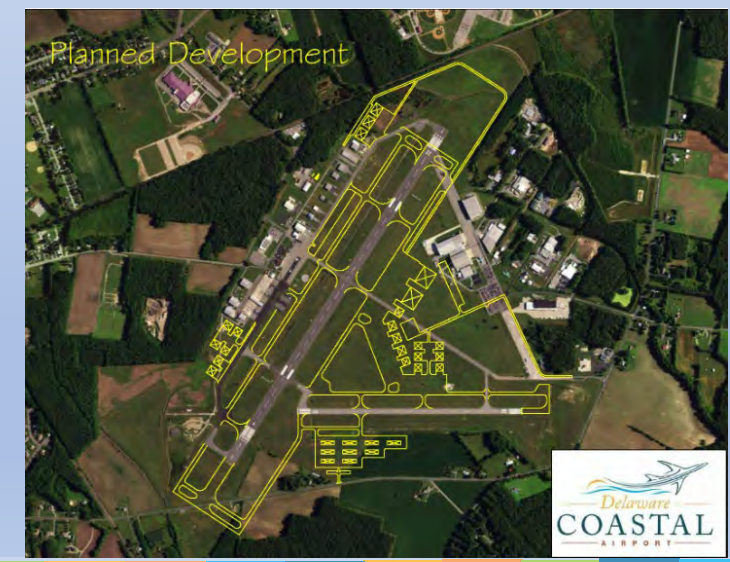




• 5,500-ft main runway to be extended to 6,000 ft.



- Private Airport
- Public Airport
- Ferry
- Transit Routes
- Freight Rail
- Major Roads
- Other Roads
- Towns



Source: Passenger Air Terminals