



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) |

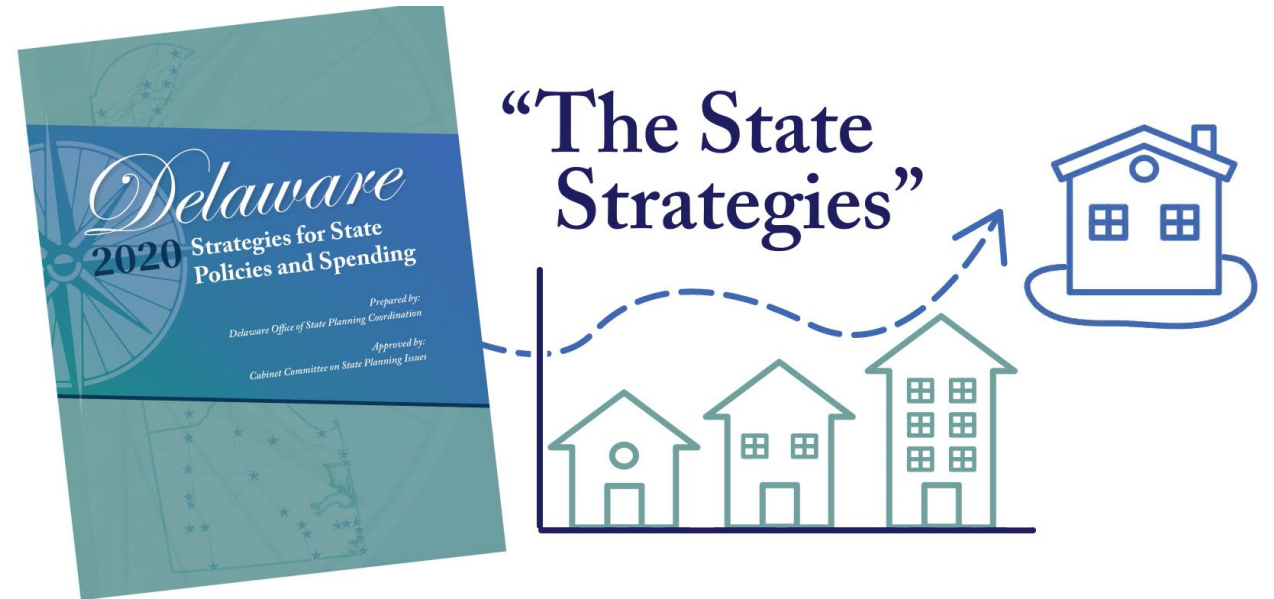


State Perspective Presentation

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

II. Data-backed insights

III. Further into the data





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CABINET COMMITTEE ON STATE PLANNING ISSUES
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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



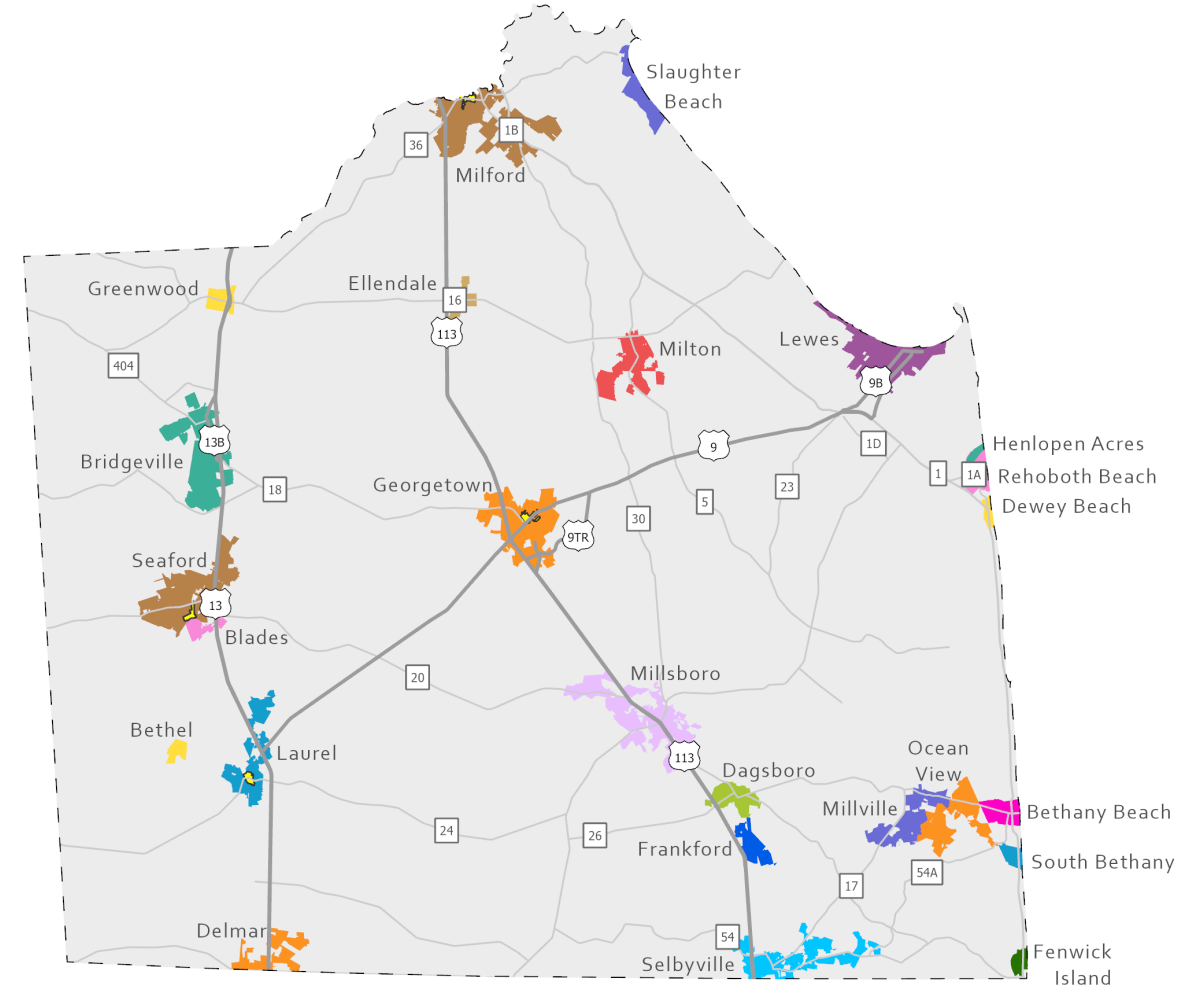
Title 22 requires all municipalities to prepare comprehensive land use plans

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”



 Downtown Development Districts

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?

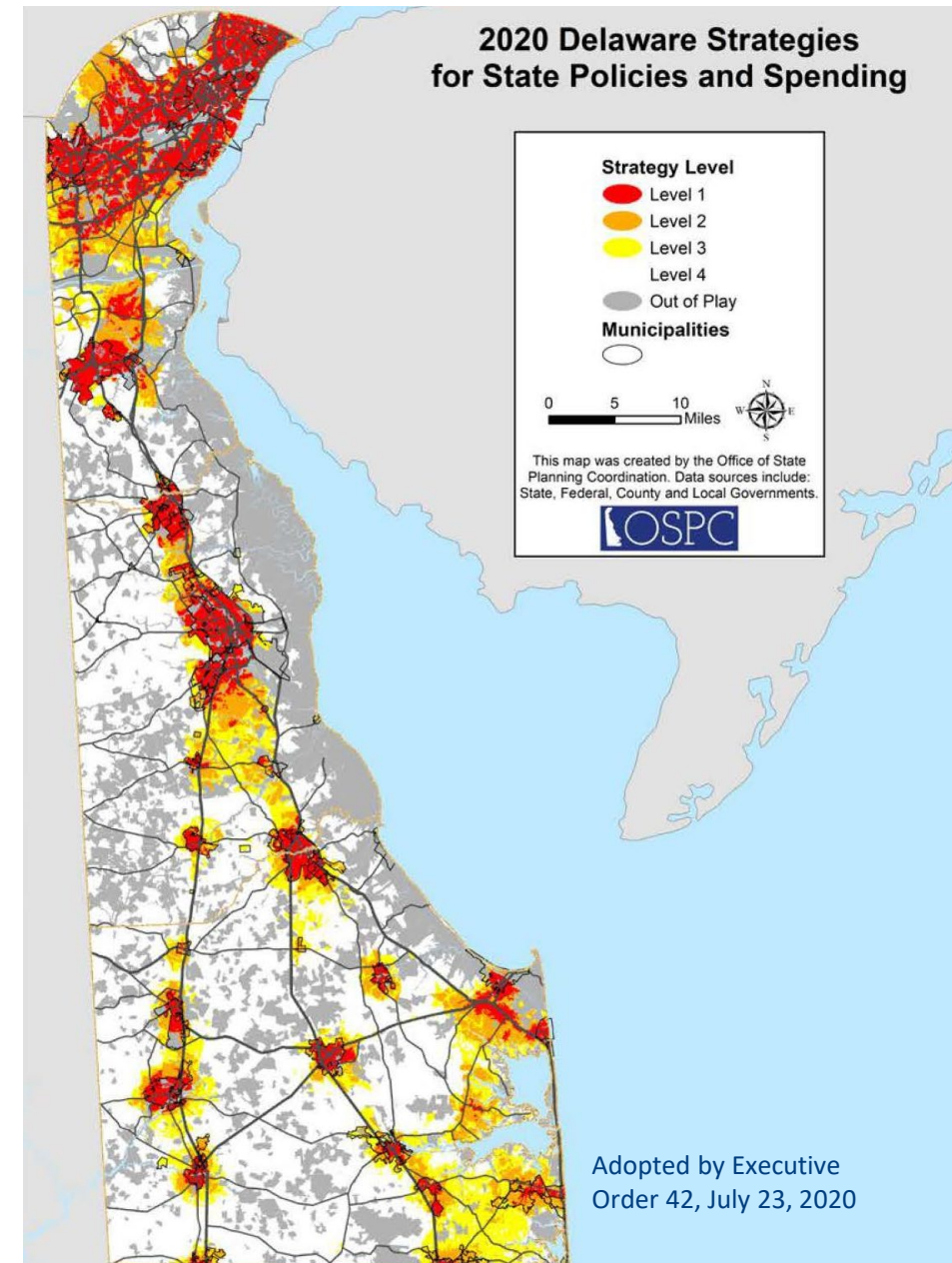
- **Required by Delaware Code*:**

... *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...***

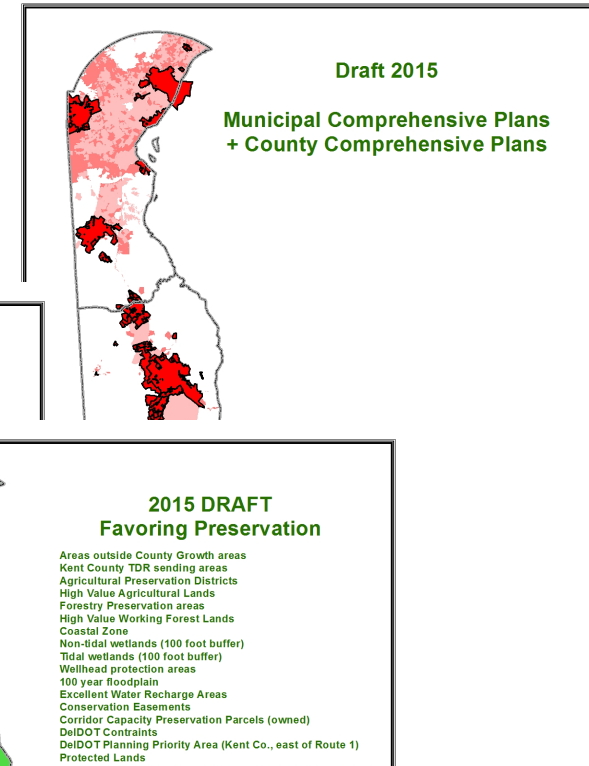
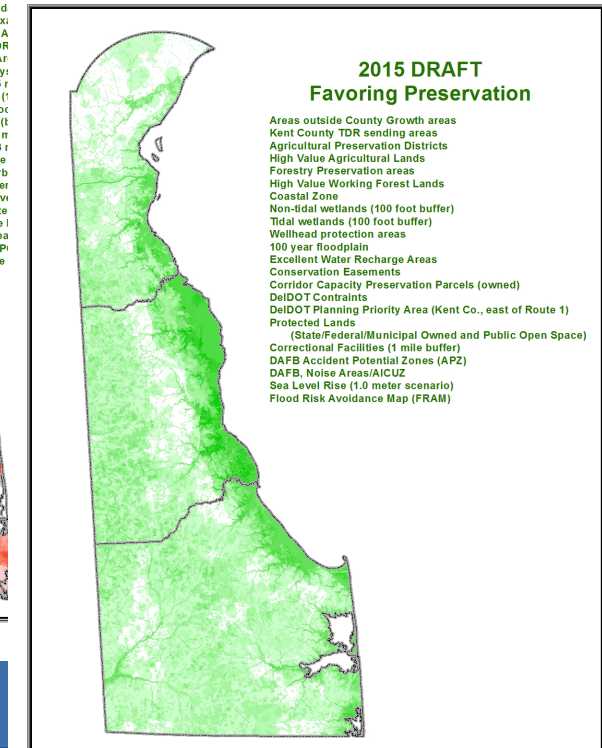
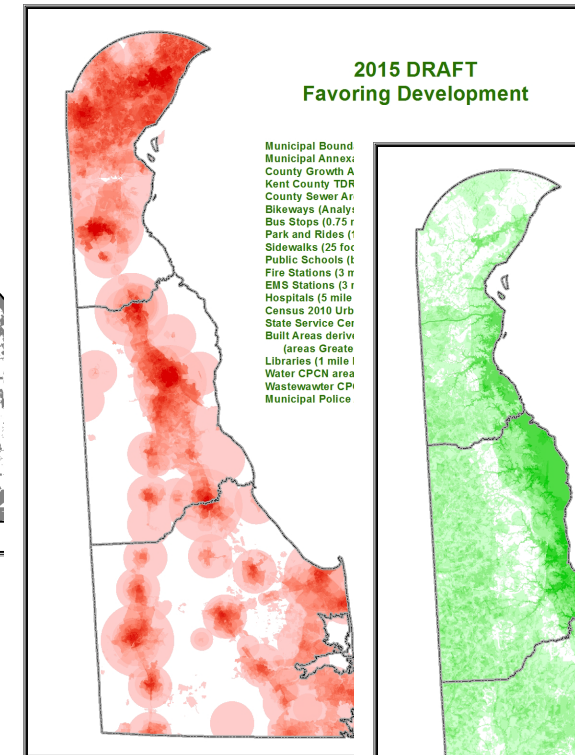
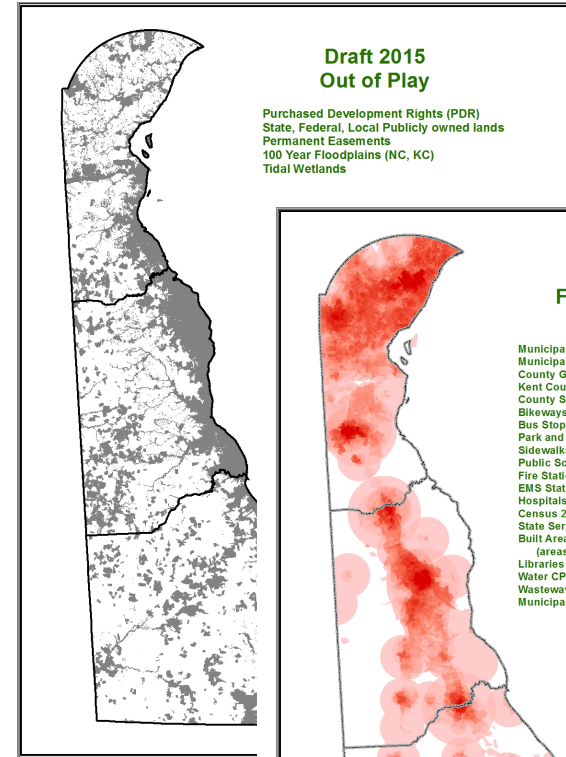
- **Policies and maps guide State investments in infrastructure and services**
- **Do not preempt local land use authority; localities make own land use decisions per Delaware law**
- **Must be considered in local comprehensive plans**
- **History: 1999 adopted; Updated in 2004, 2011, 2015 & 2020**

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

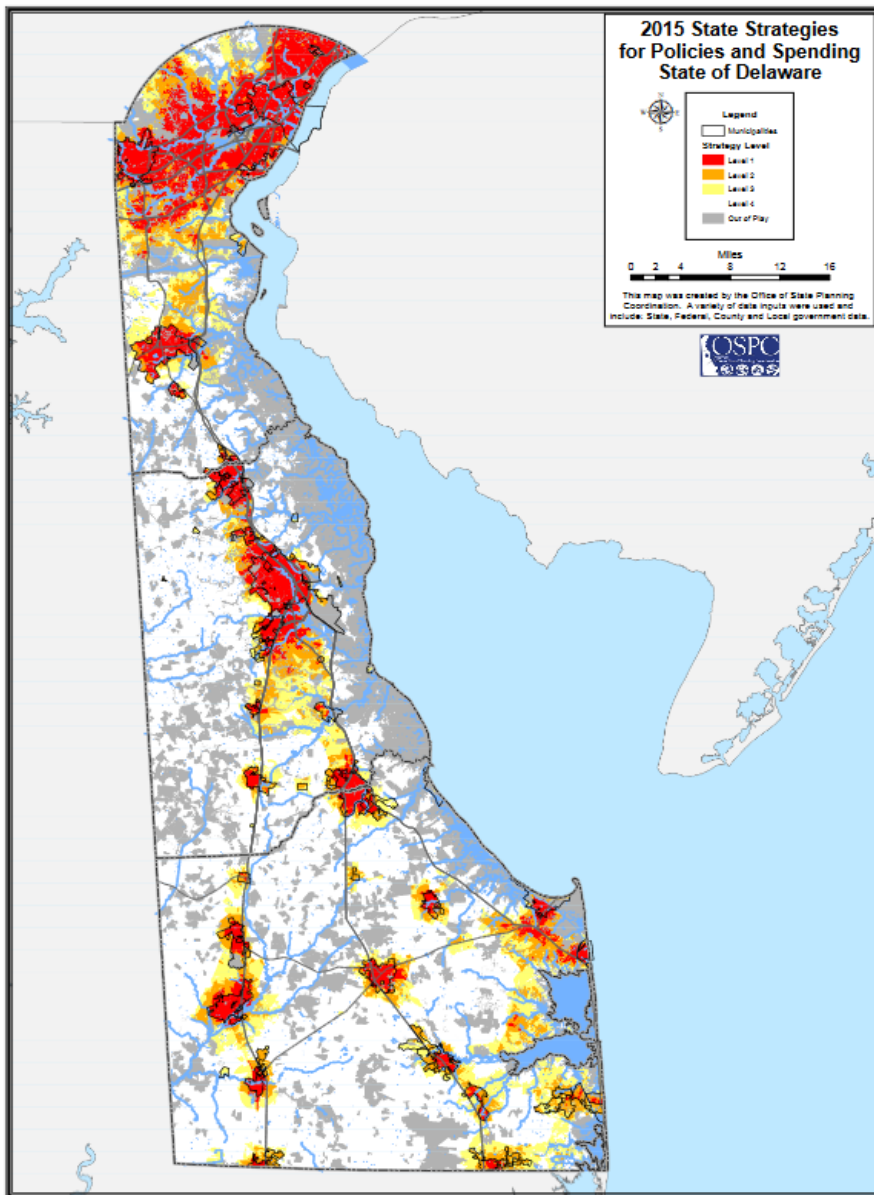


Data used to make maps include:

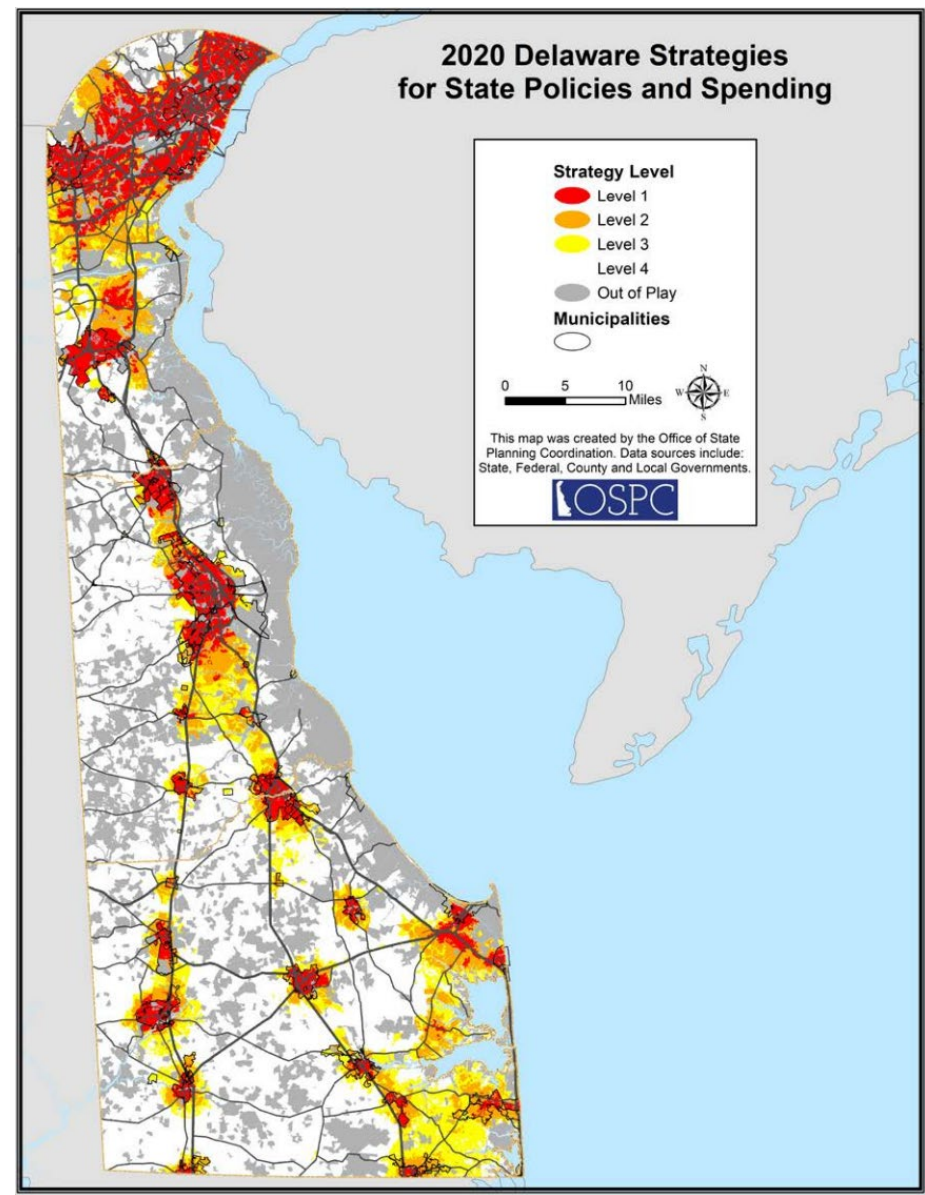
- School Sites
- Transit Routes
- Social Service Centers
- Police/Fire/EMS Facilities
- Corridor Capacity Preservation Areas
- Ag Preservation Districts
- Green Infrastructure
- Parklands
- Municipal and County certified comprehensive plans



Packets on table show the layers used to generate maps



2015 Strategies



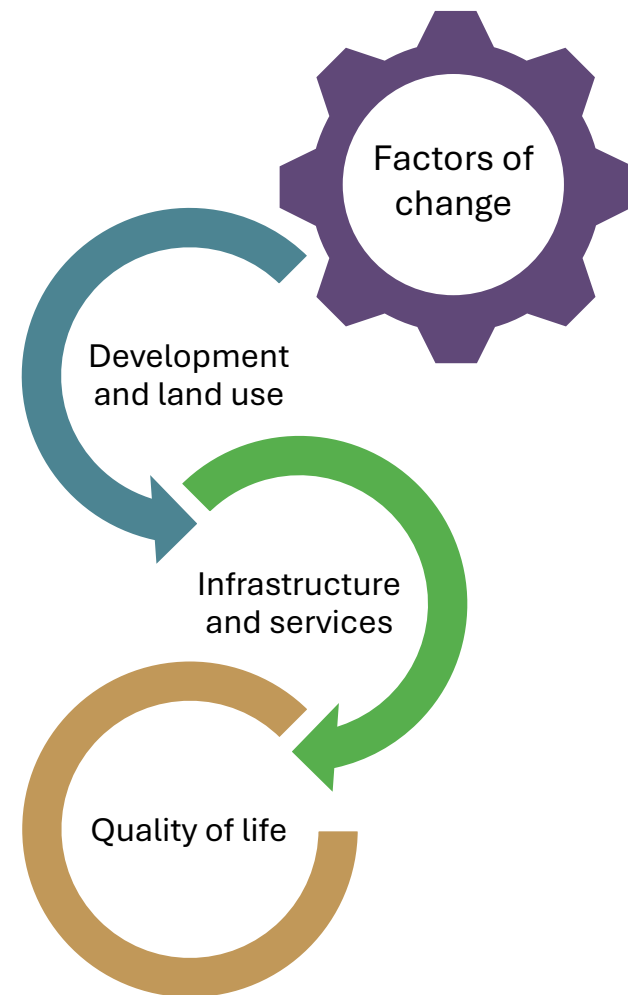
2020 Strategies



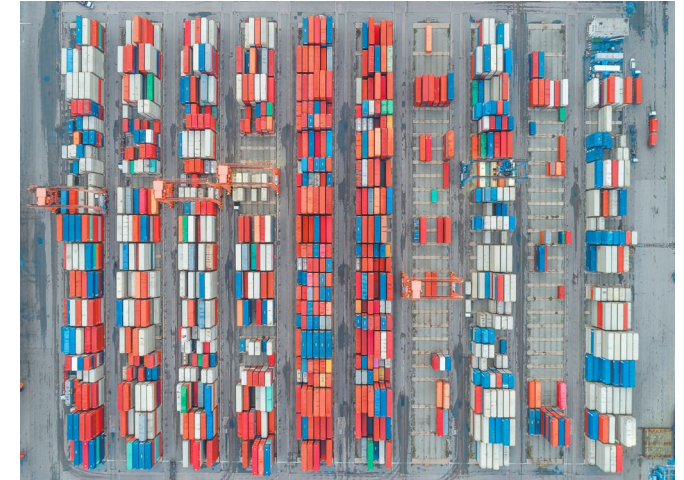
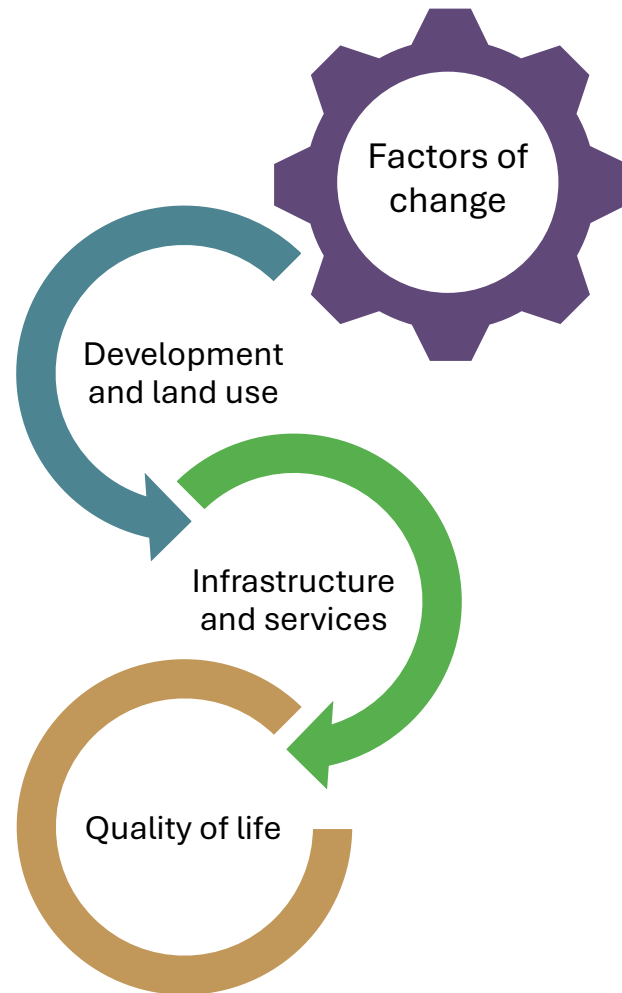
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II. Data-Backed Insights

External factors and their effects on Delaware communities



External Factors



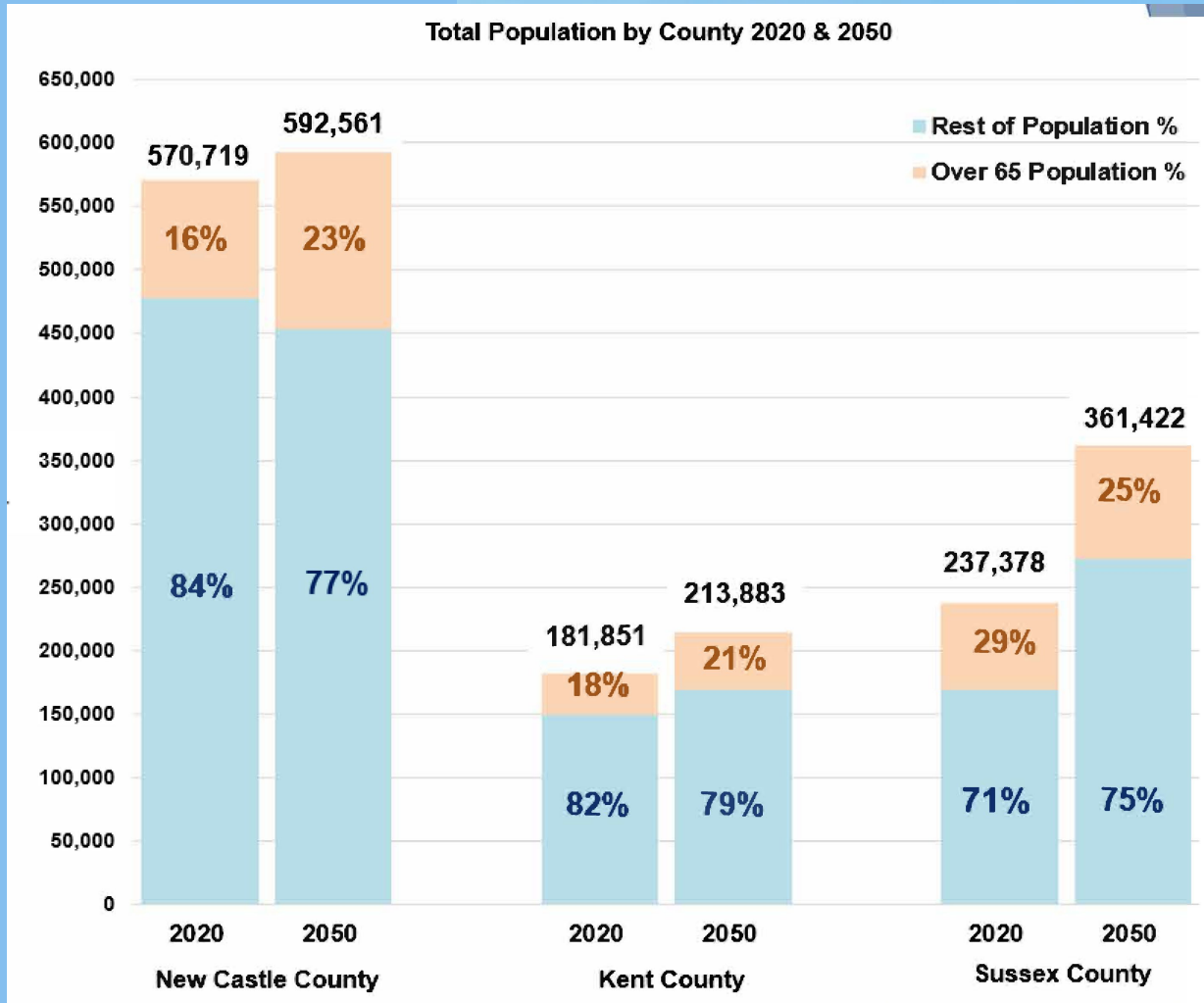
Factors Affecting Delaware



- **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.



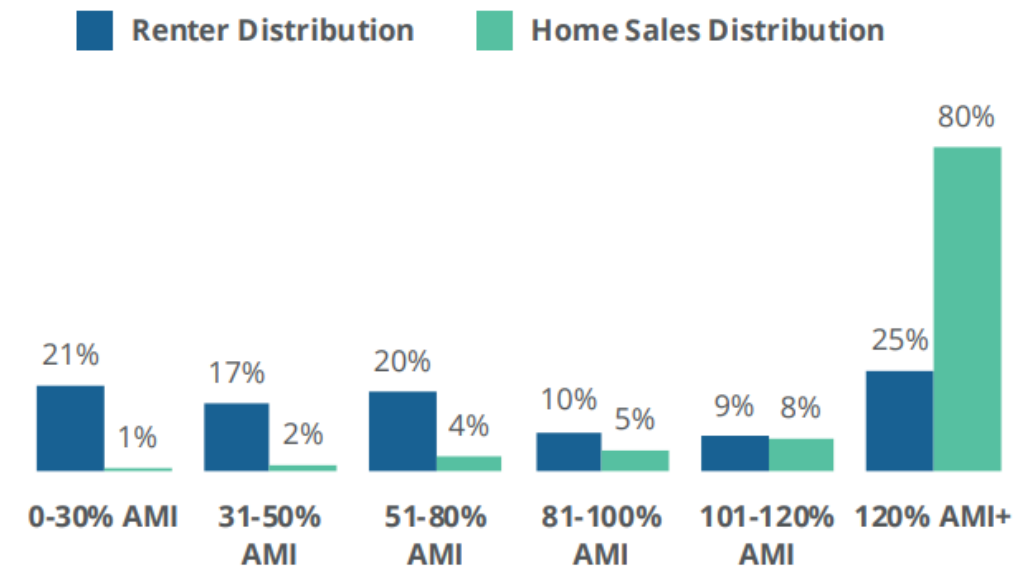
Data Insight: Demographics are Changing

- 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.

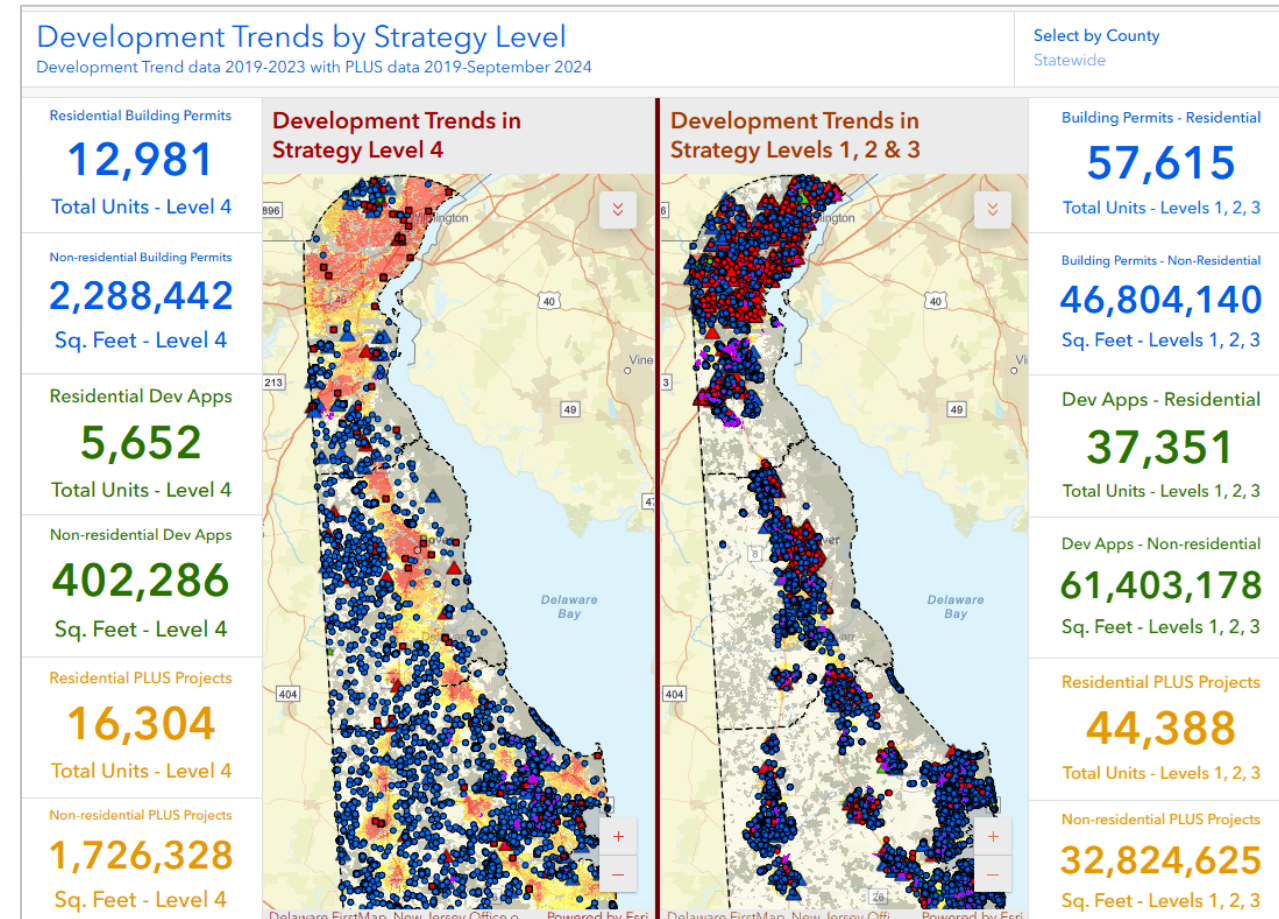
Source: Root Policy Research, 2021 ACS 5 year estimates, and HMDA.

Data Insight: Development and Land Use

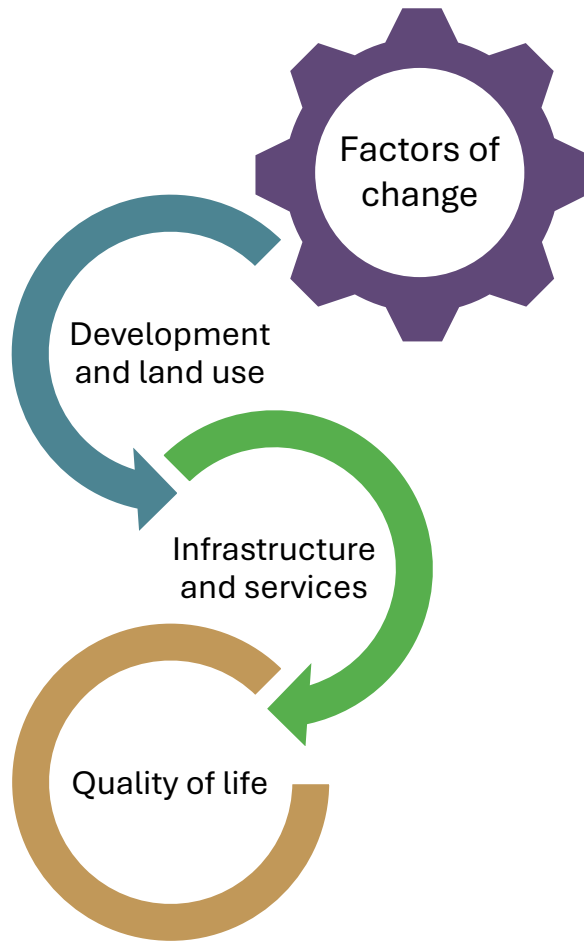
- Sprawl
- Uniform housing
- Warehousing/logistics

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

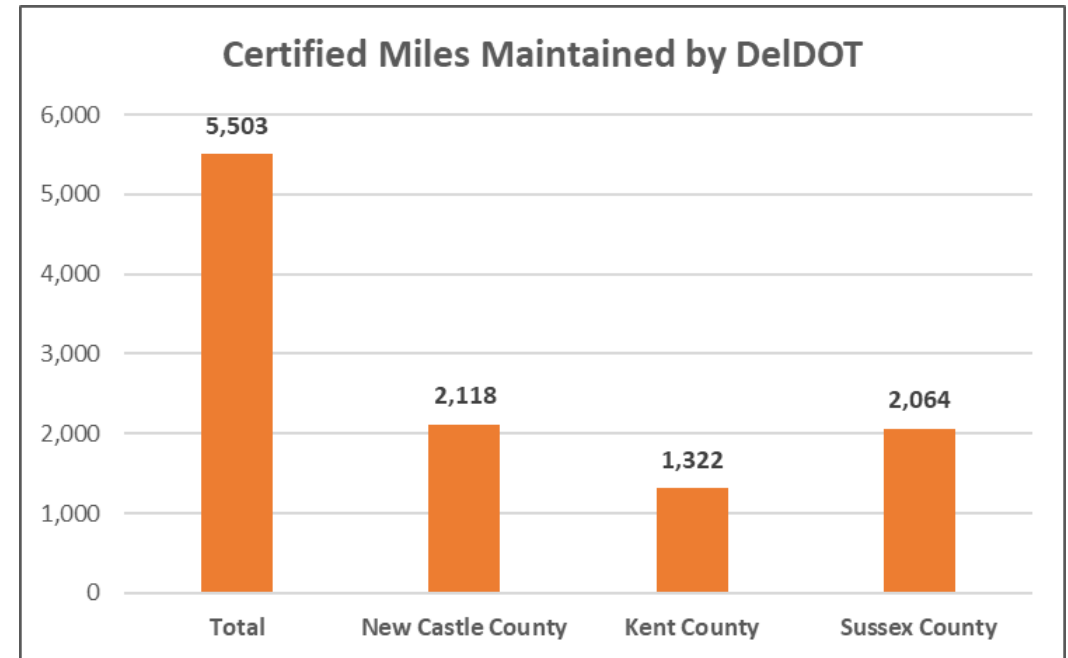
Housing

Transportation

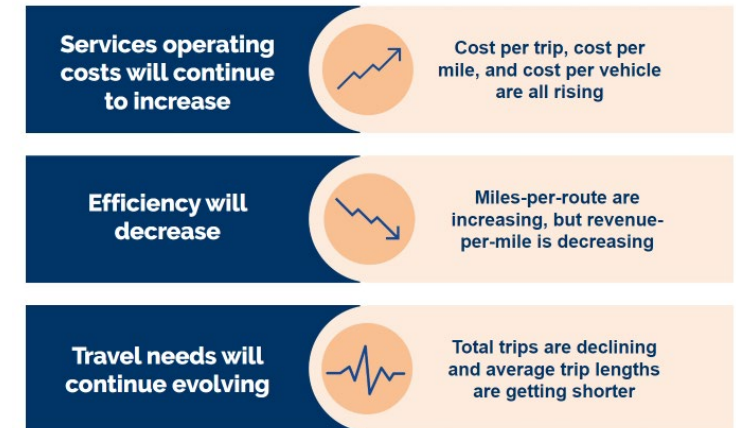
Delaware DOT manages 89%
(national average of state-maintained roads: 20%)

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

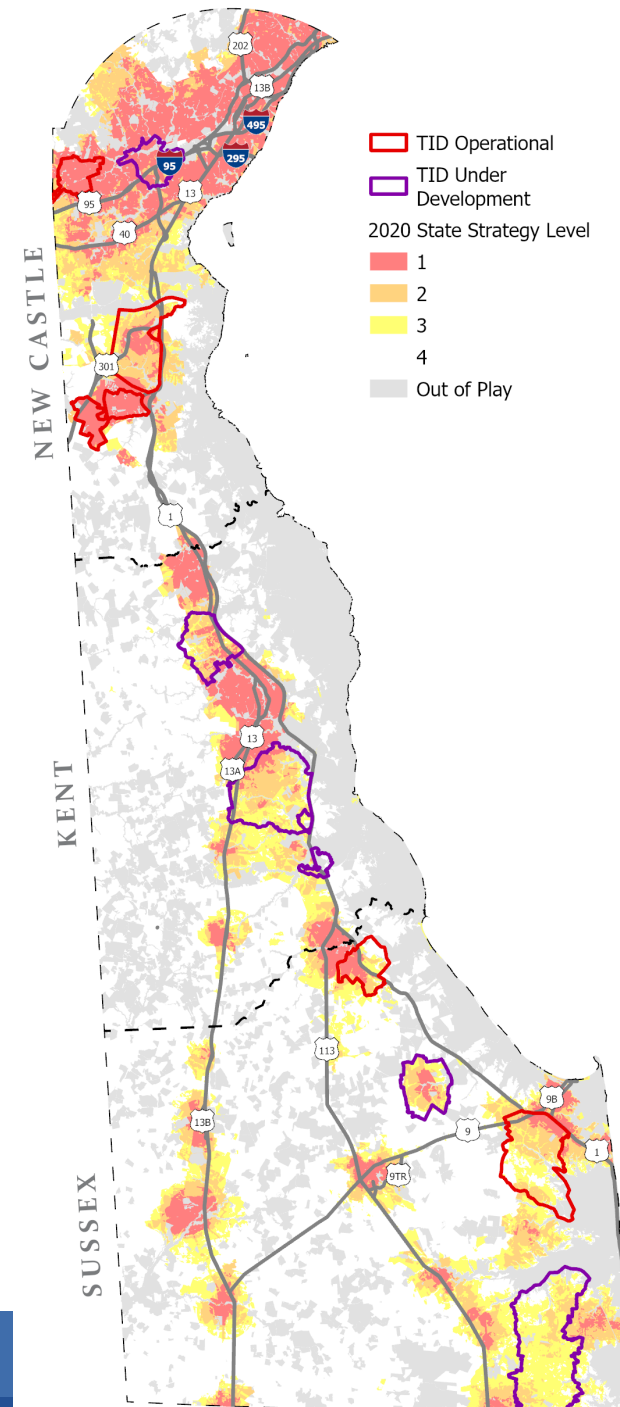
(includes 2 of 7 TIDs currently under development)

TID Operational

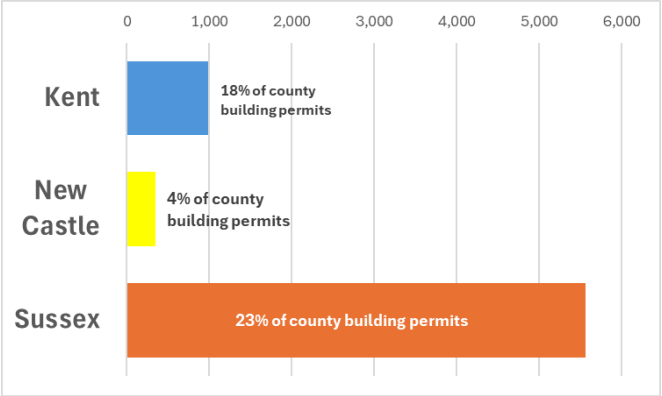
- Newark
- Southern New Castle County
- Hyetts Corner
- Westtown
- Easttown
- SE Milford
- Henlopen

TID Under Development

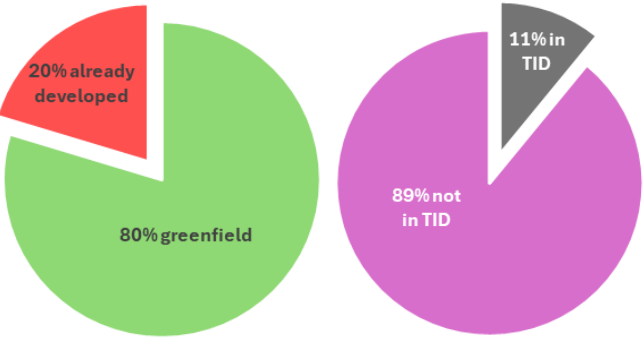
- Little Heaven
- South Frederica
- Cheswold Area
- Magnolia
- Milton
- Roxana Area
- Churchman's Crossing



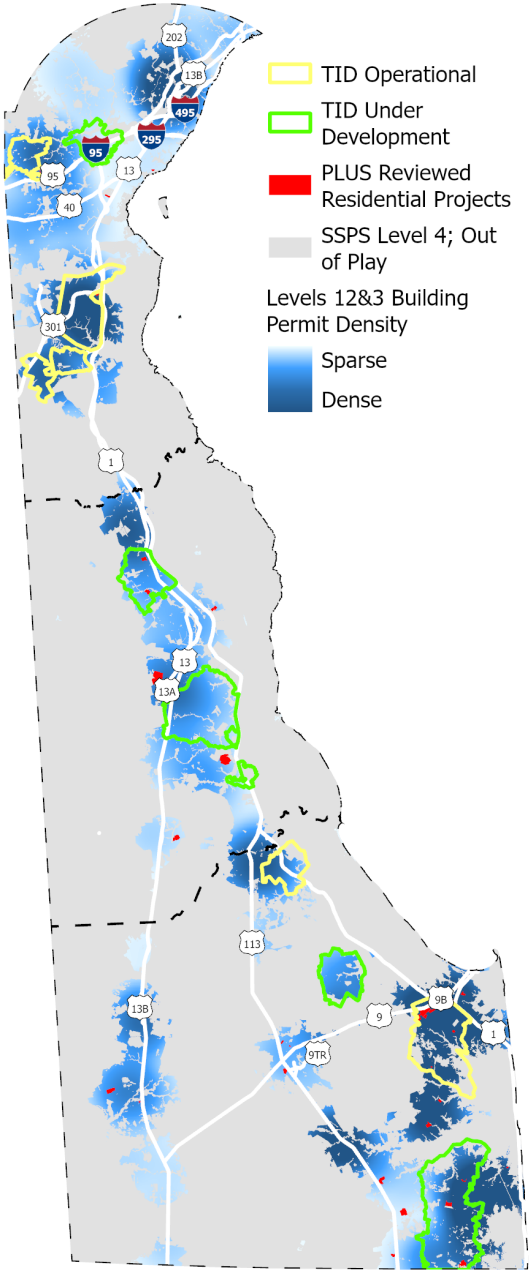
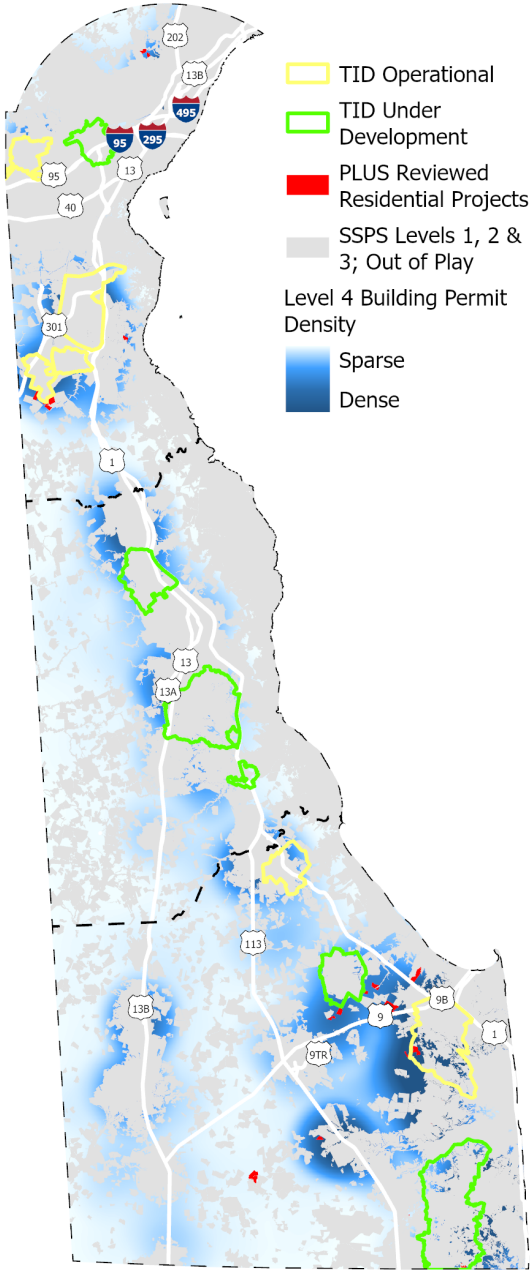
Development Trends in
Strategy Level 4



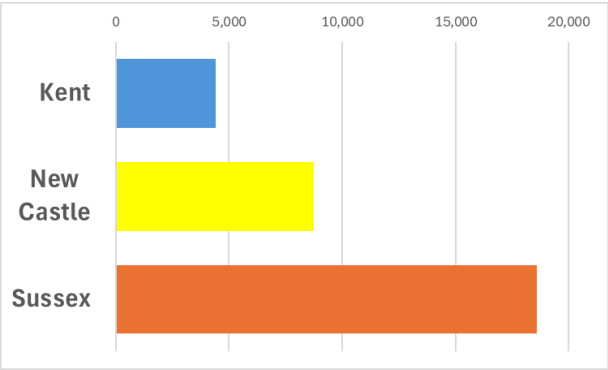
Building Permits Level 4:
6,886 residential units (18%)
765,659 non-residential sqft (3%)



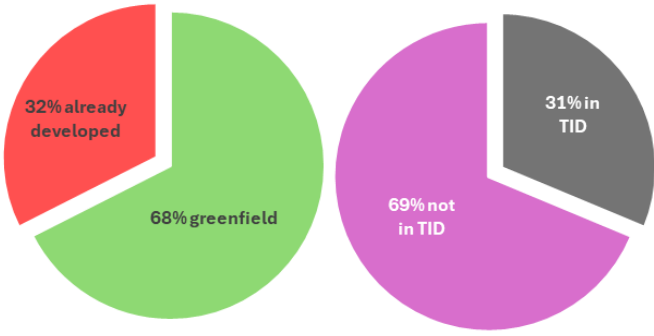
Reviewed PLUS Dev't Level 4:
8,685 residential units (46%)
814,100 non-residential sqft (13%)



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%)

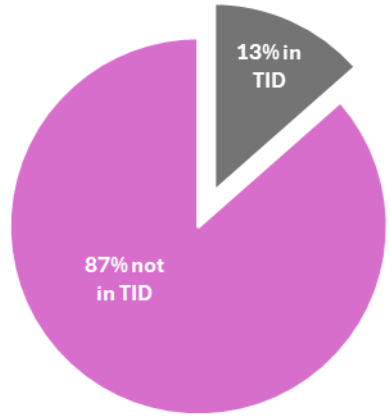
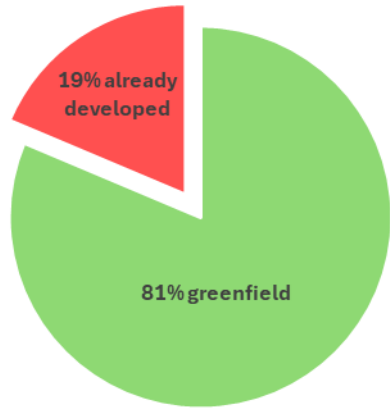


Reviewed PLUS Dev't Level 1, 2 & 3:
10,353 residential units (54%)
5.4M non-residential sqft (87%)

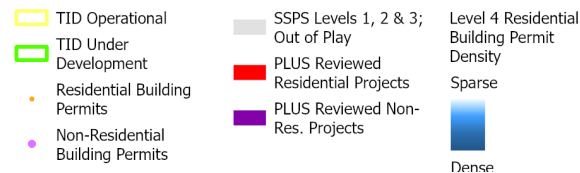
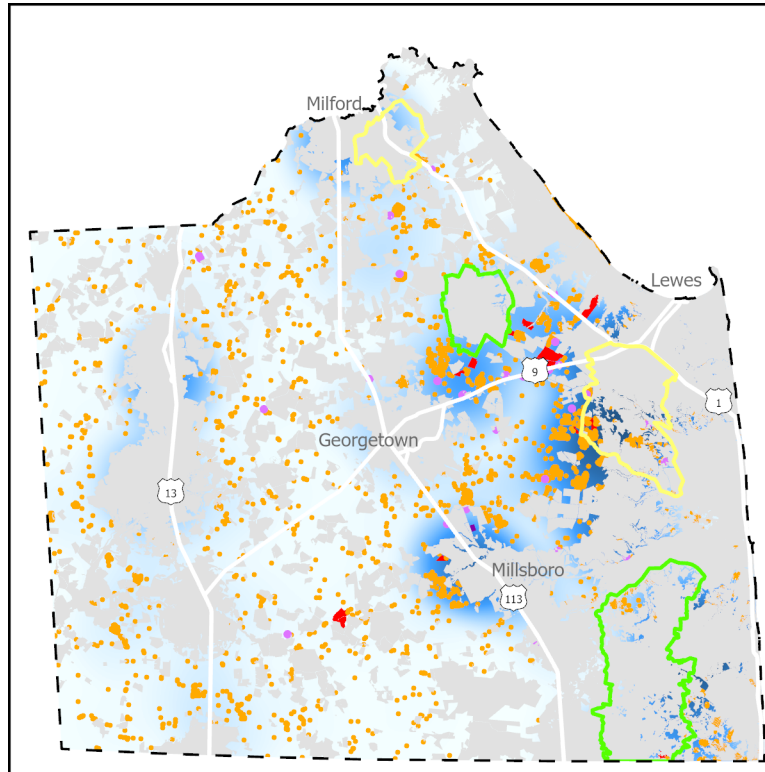
*includes building permits 2019-2023 and reviewed residential PLUS developments 2023-June 2024

Development Trends in Strategy Level 4

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



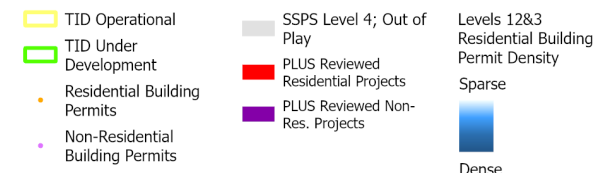
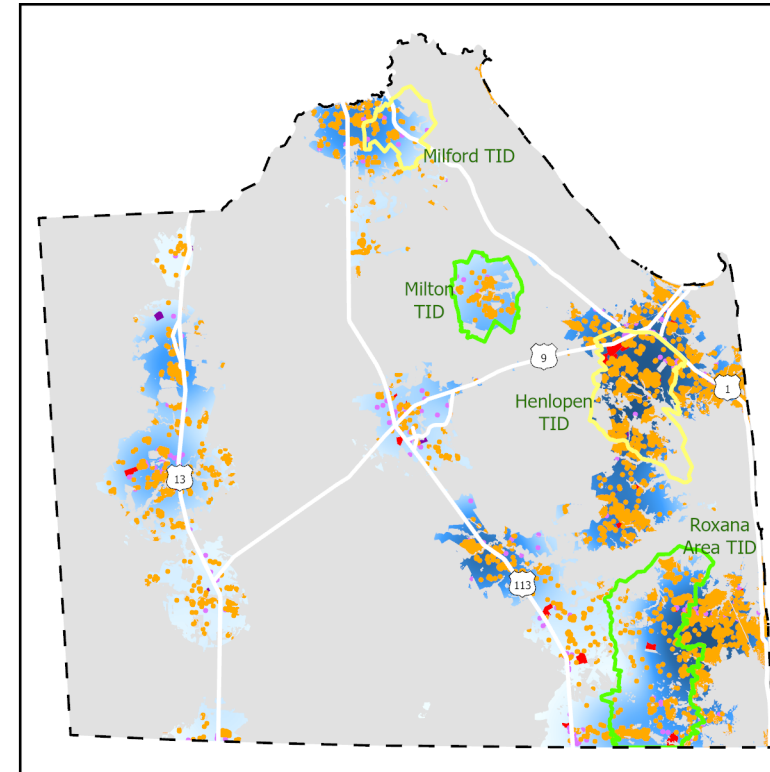
Reviewed PLUS Dev't Level 4:
7,410 residential units (58%)
845,145 non-residential sqft (20%)



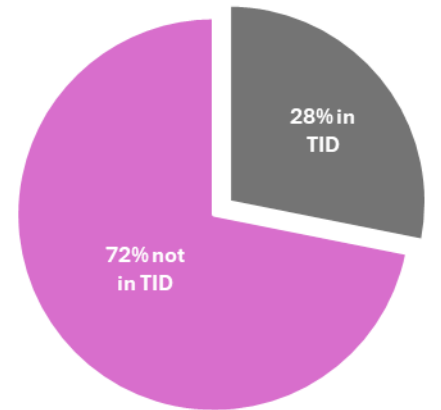
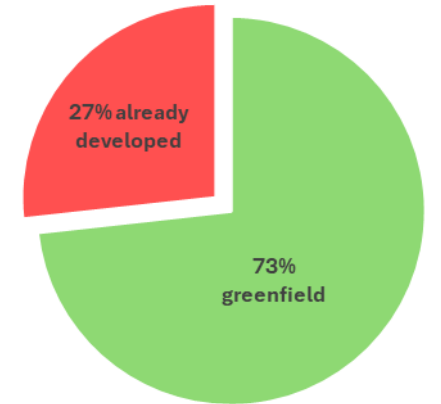
SUSSEX COUNTY

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
D E L A W A R E

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



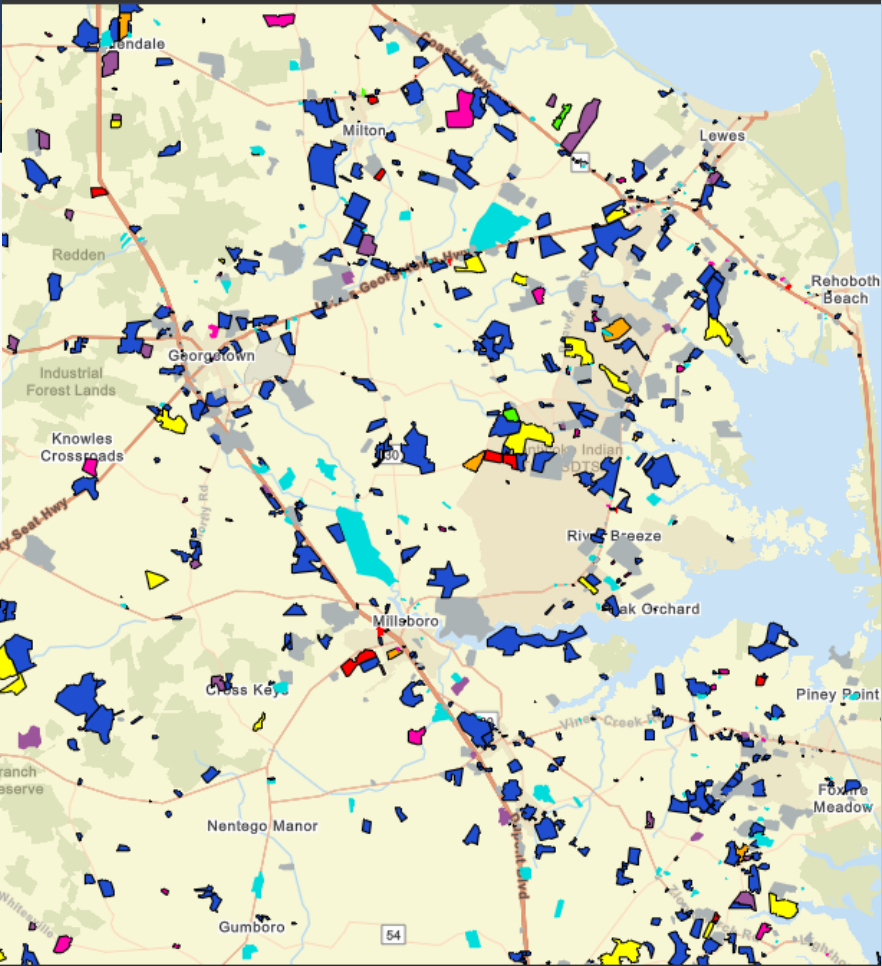
DeIDOT Agreement
Dashboard

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/NASA, 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

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	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

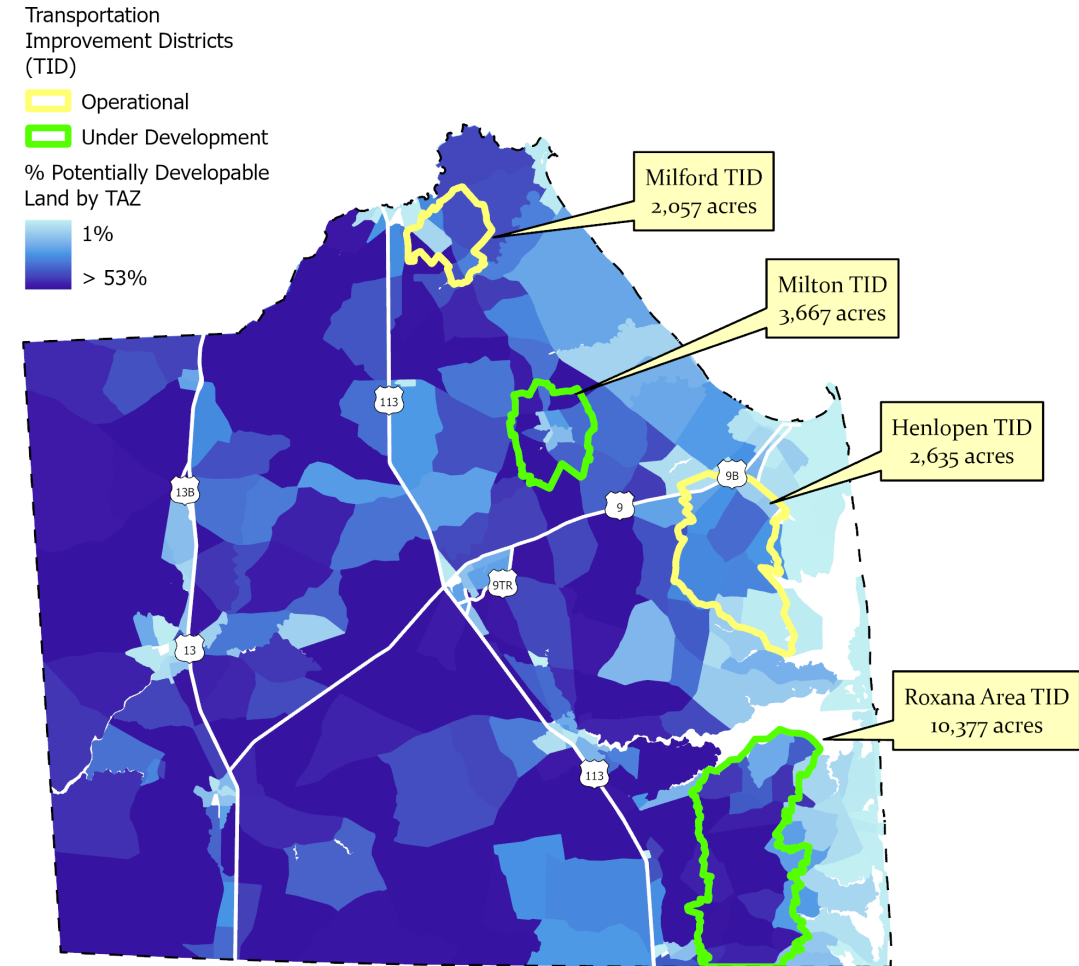
—

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

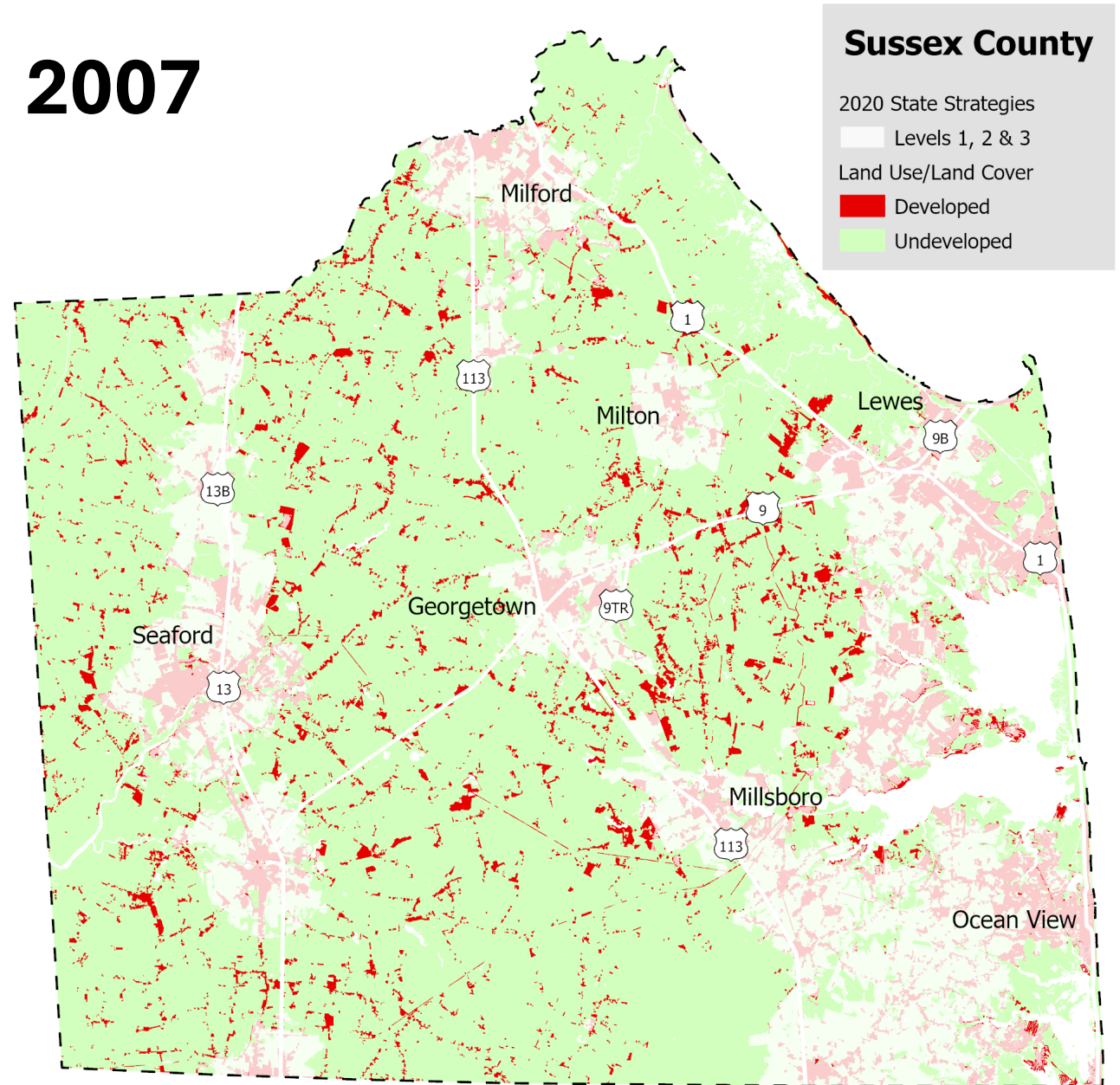
Percent of land developable (estimated by TAZ)



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

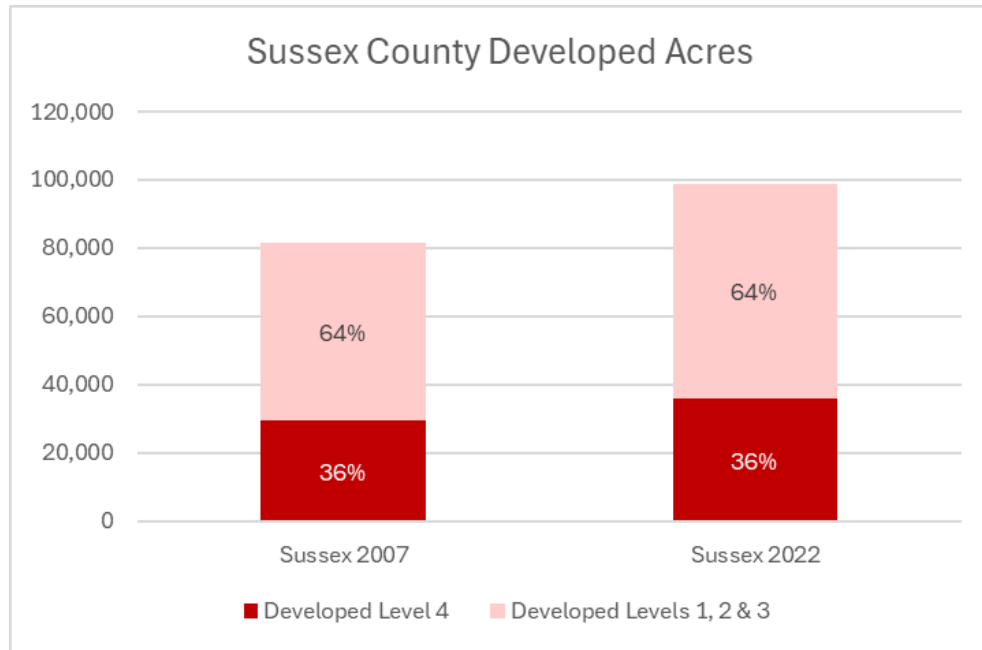
Developed Land

2007

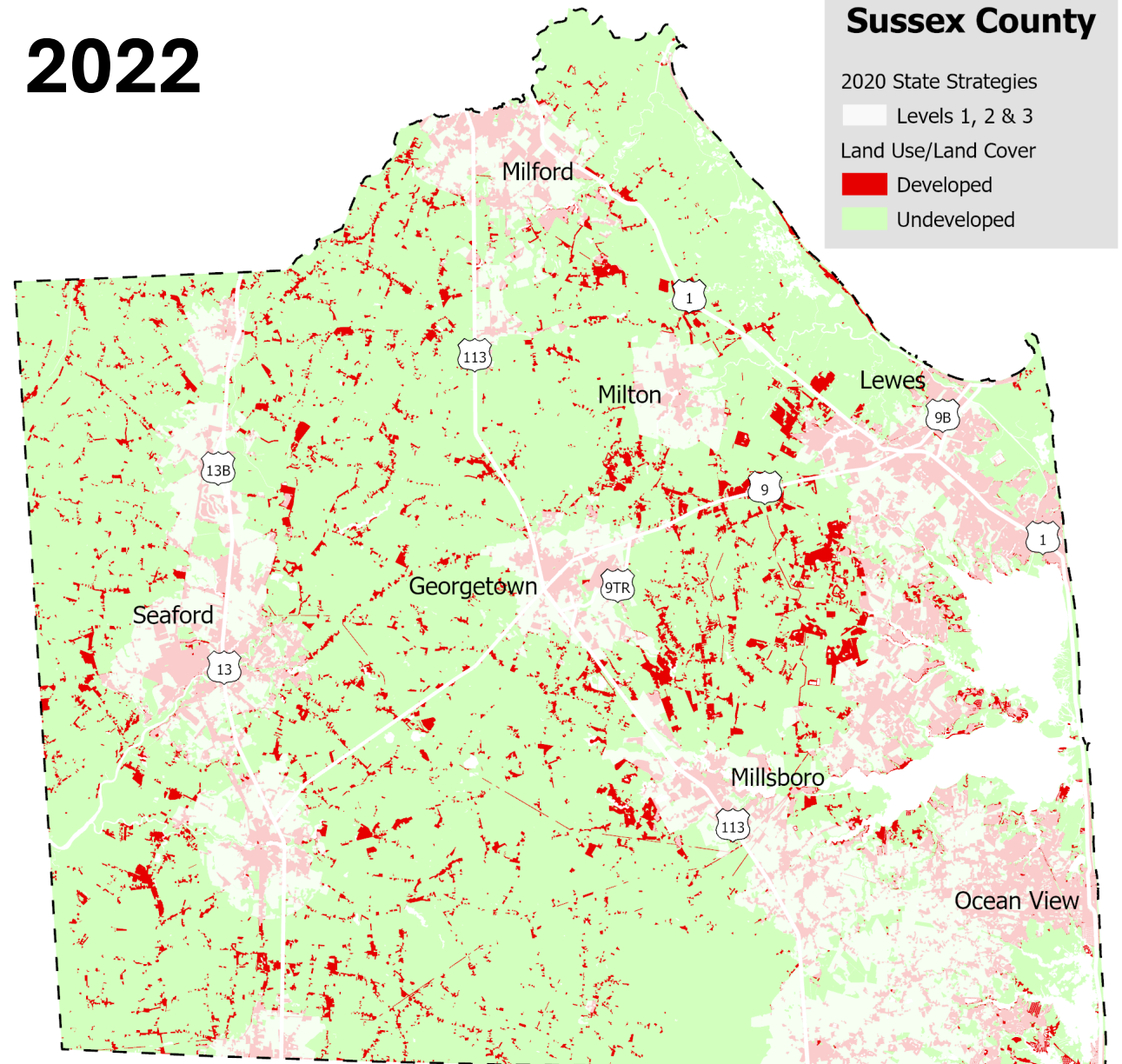


Developed Land

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

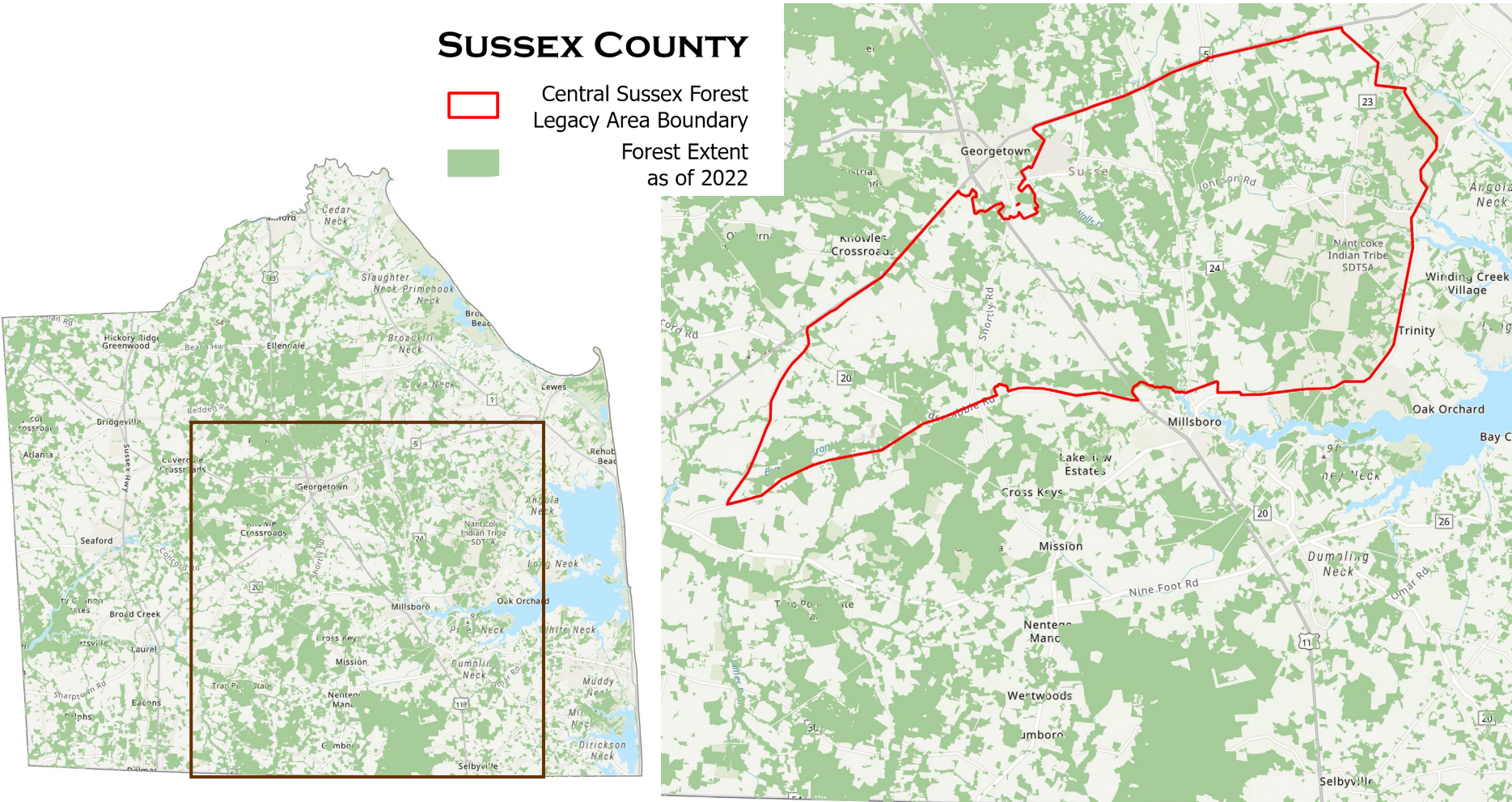


2022



Environment – Land / Resources at Risk

Delaware Statewide Forest Strategy

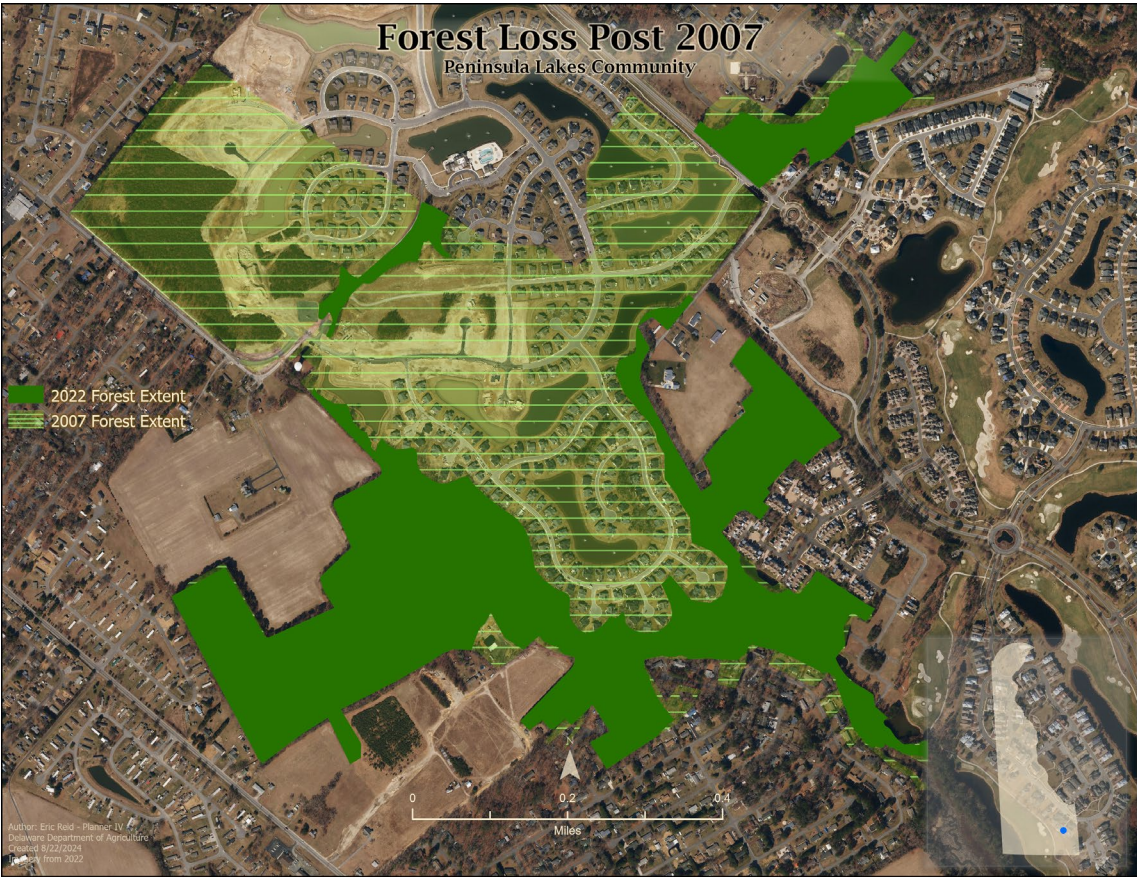
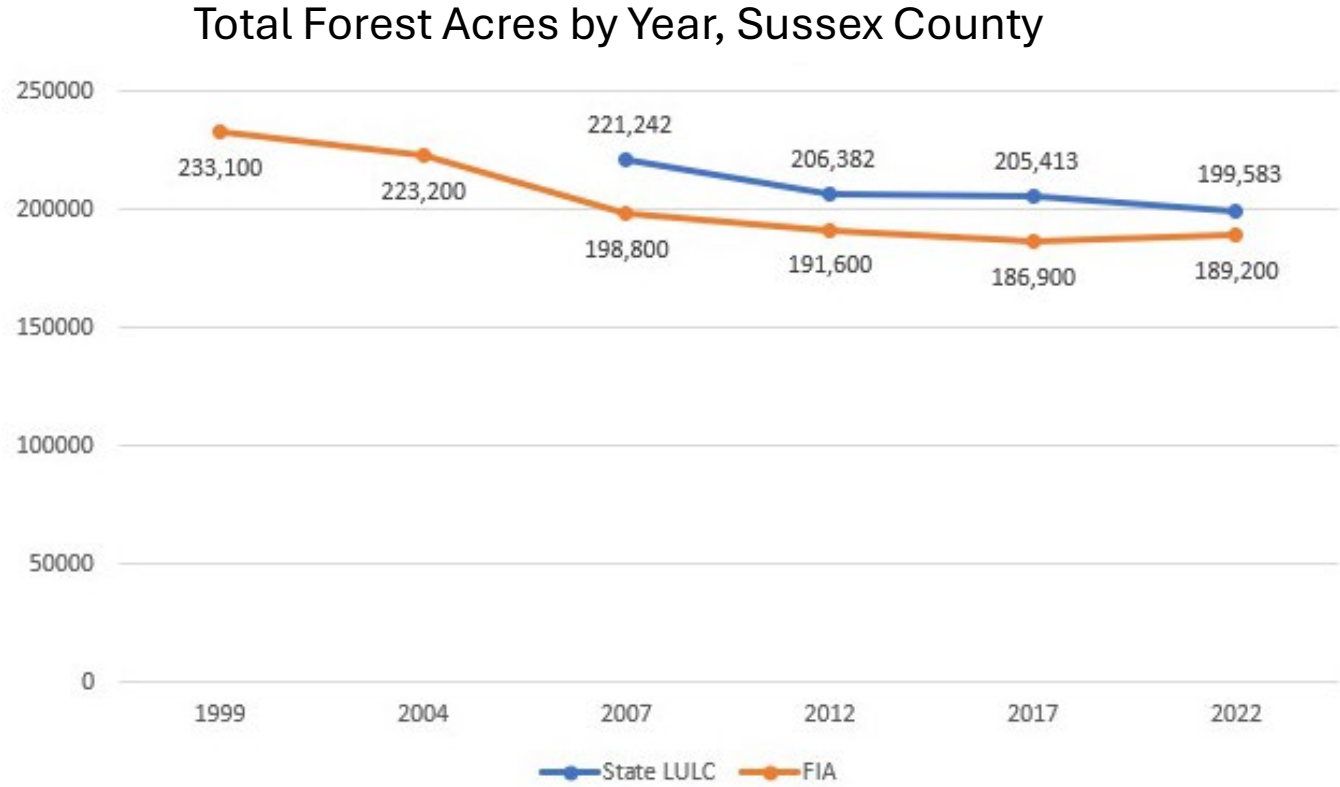


First done in **2010** and updated in **2020**, this strategy combines the work of non-profits along with local, county, state, and federal governments to address forestland issues and threats in both rural and urban areas. Forest Legacy Areas are of high priority for preservation / conservation.

2020 Key Threats:

- Conversion
- Fragmentation
- Forest Health pests
- Impacted wetlands

Environment – Land / Resources at Risk

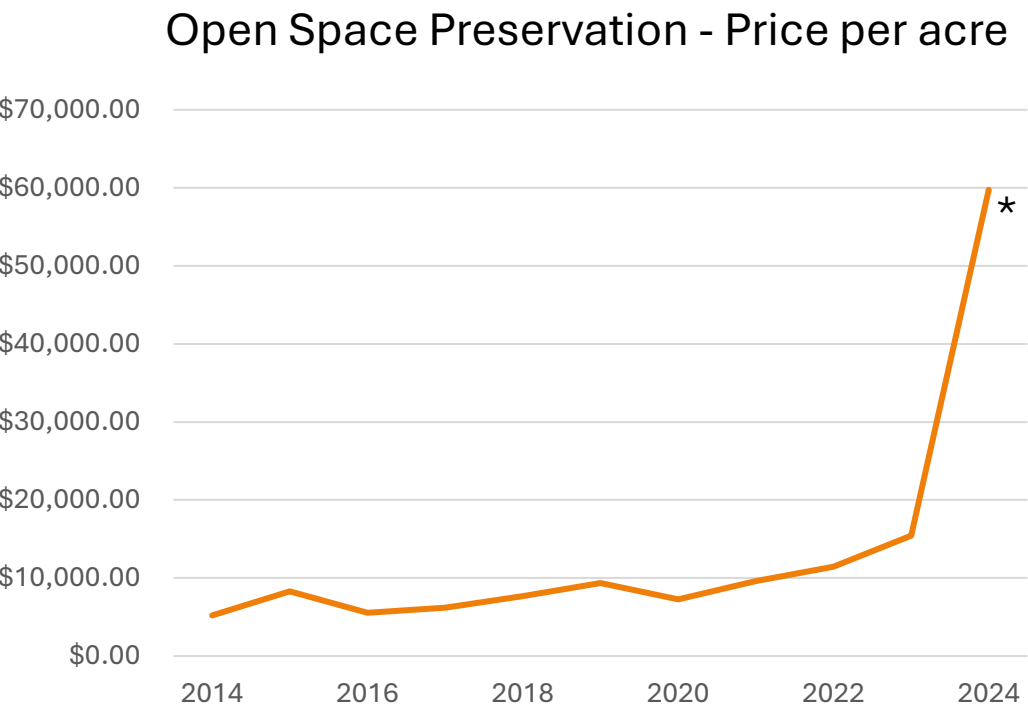


Land Use Land Cover data

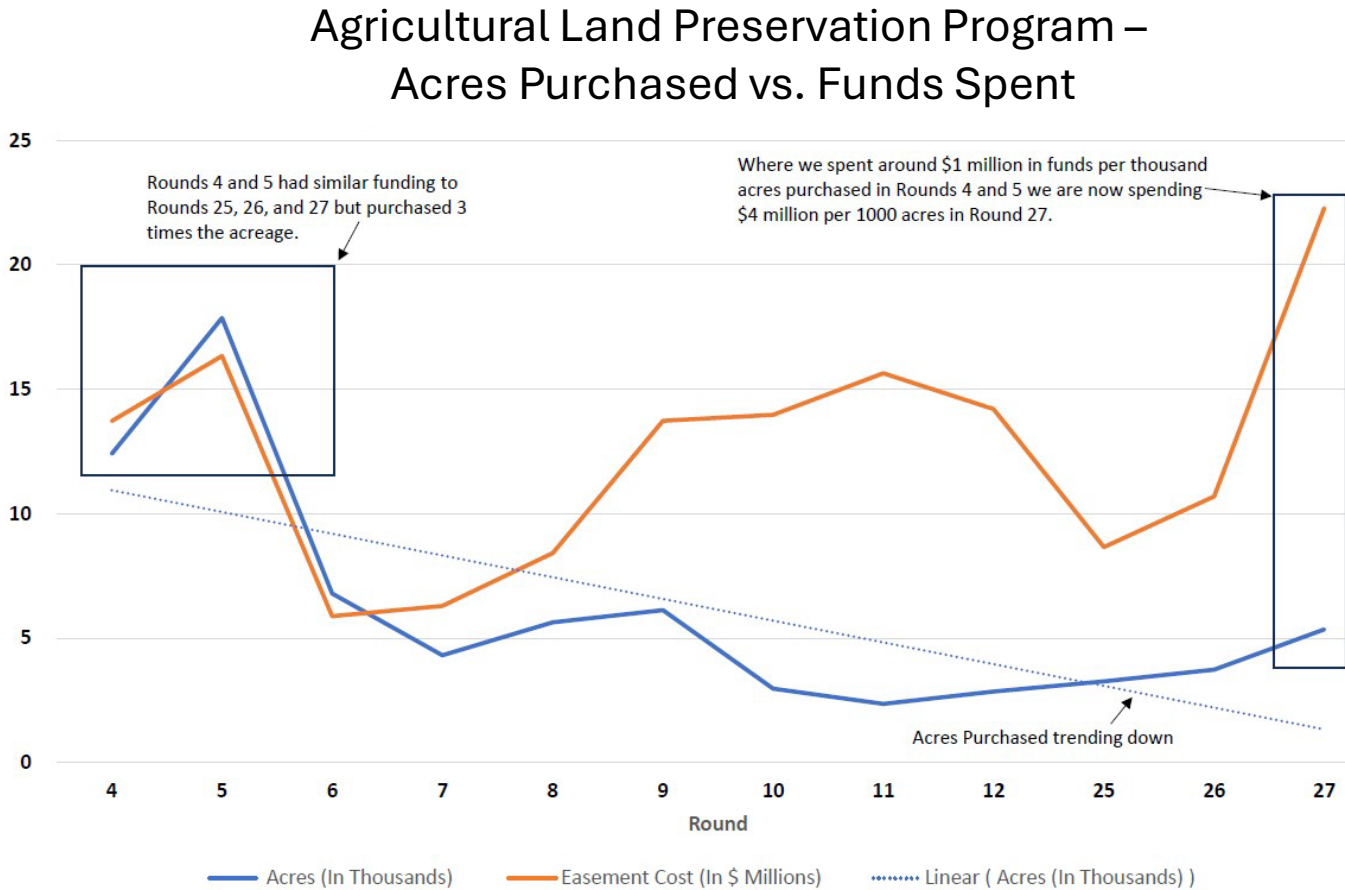
LULC – Land Use Land Cover

FIA - Forest Inventory and Analysis

Environment – Preservation Efforts and Challenges

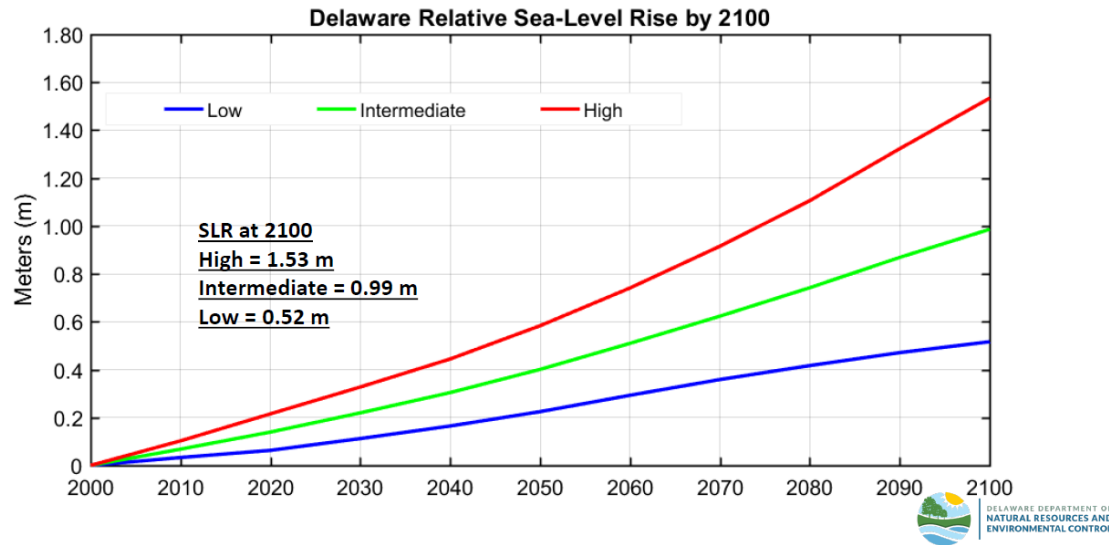


*Note: Price spike in 2023 and 2024 due to a key 285-acre land purchase adjacent to White Clay Creek State Park.



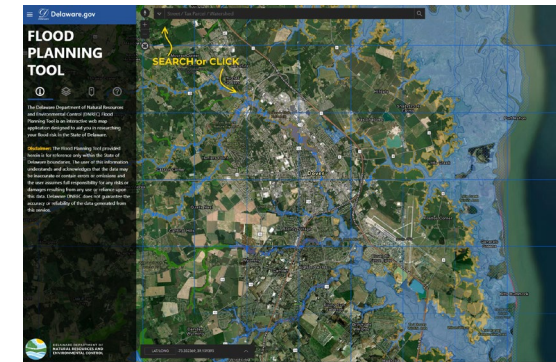
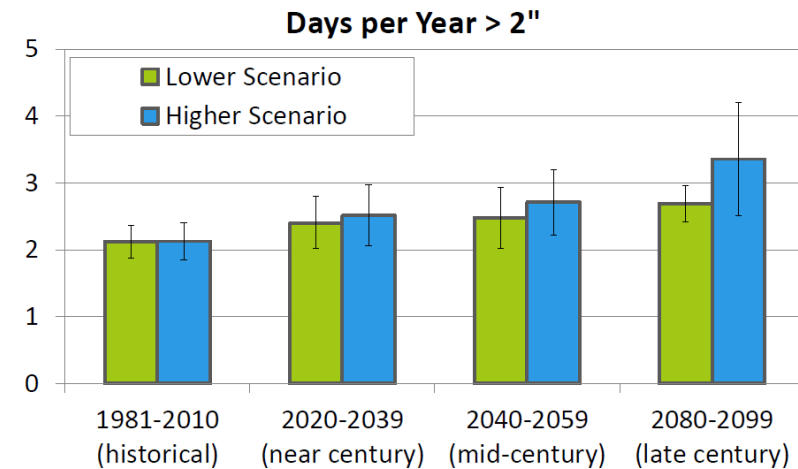
Environment – Resiliency and Adaptation

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

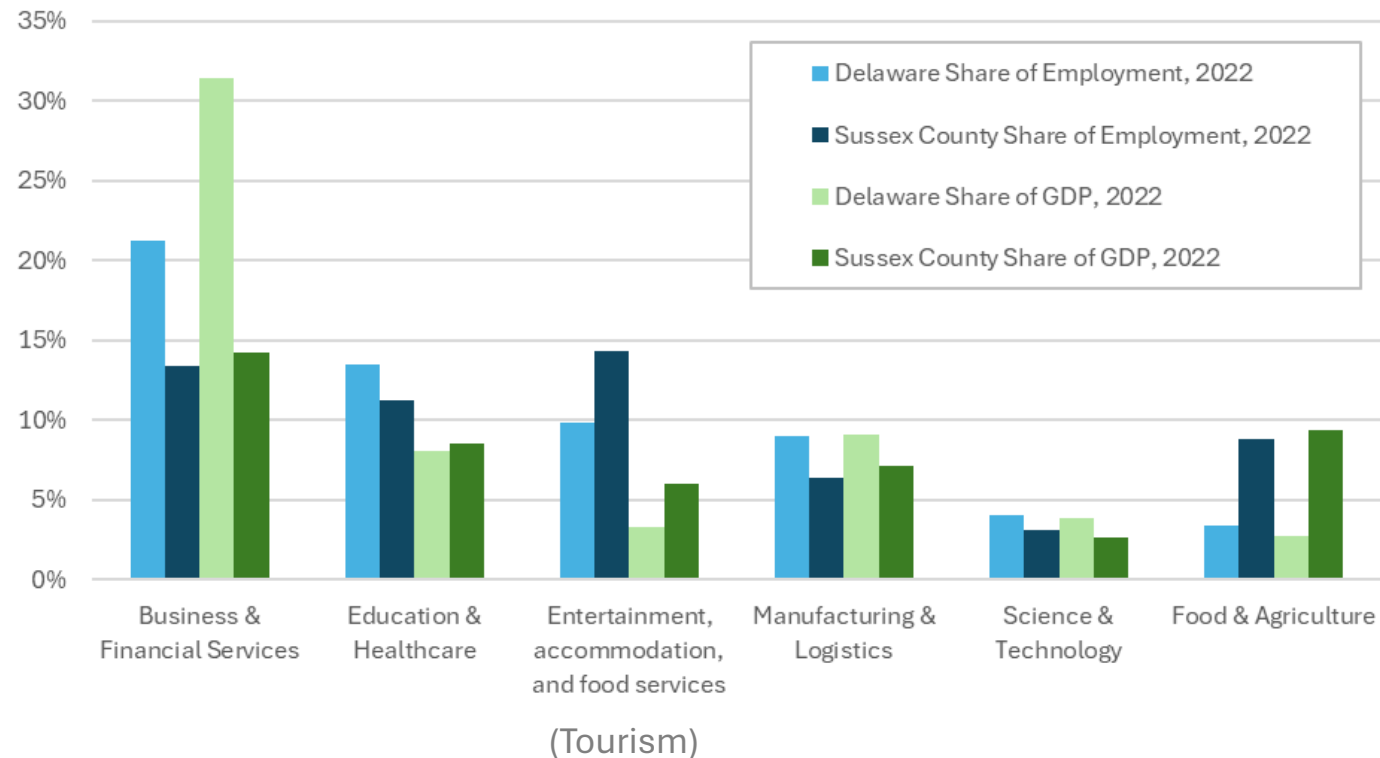
Delaware total GDP: \$90.4 billion

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?

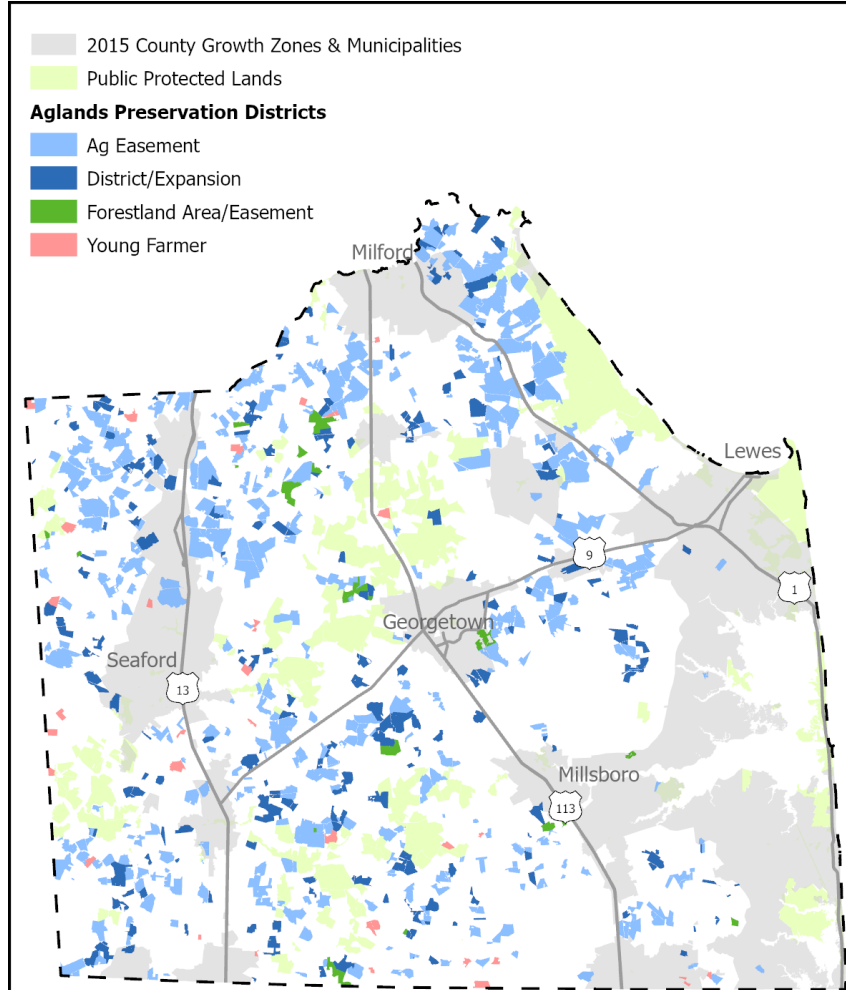
Key Economic Sectors in Delaware and Sussex County



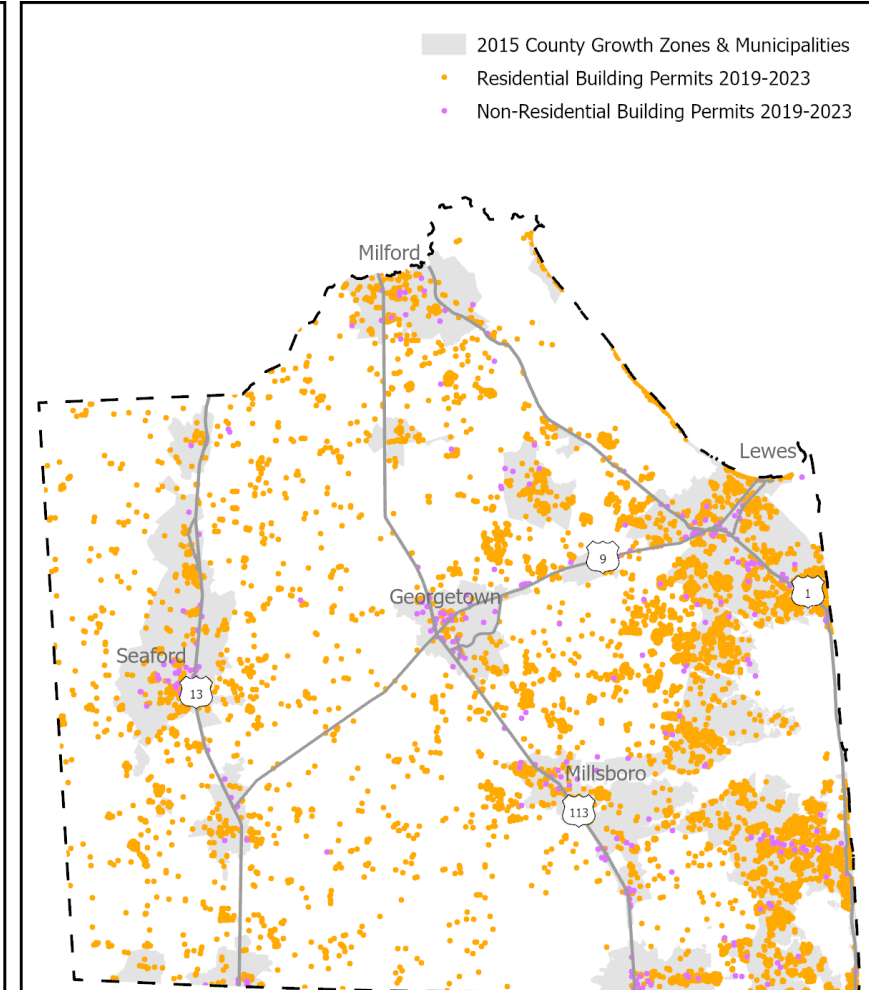
Economy – Concerns

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

Land Preservation (through Oct 2024)

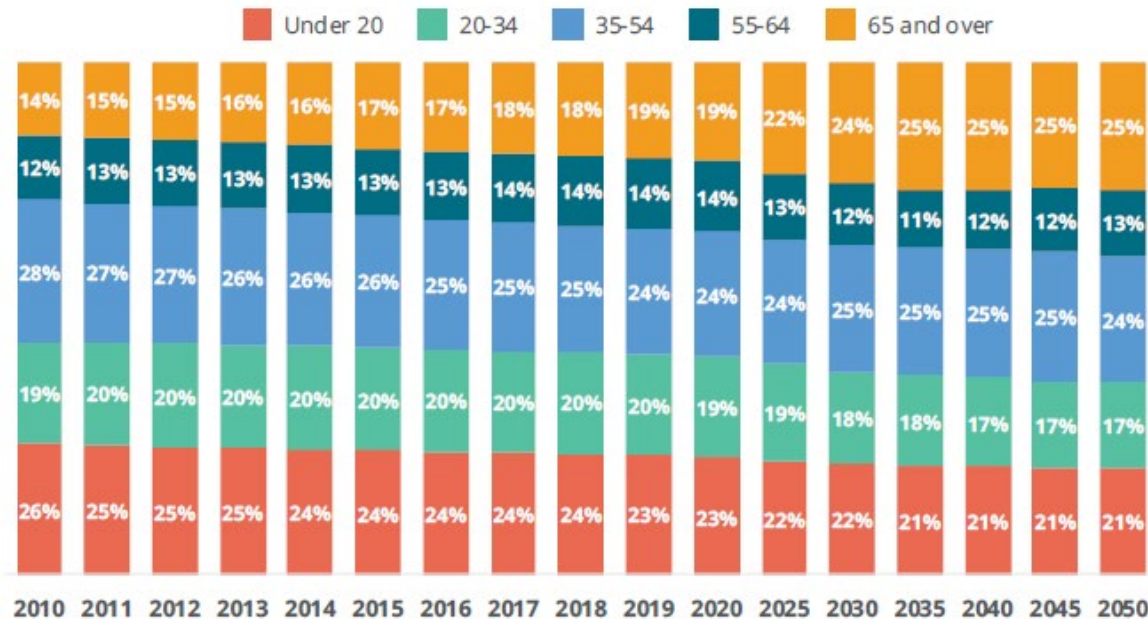


Development (building permits, 2019-2023)



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.

 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

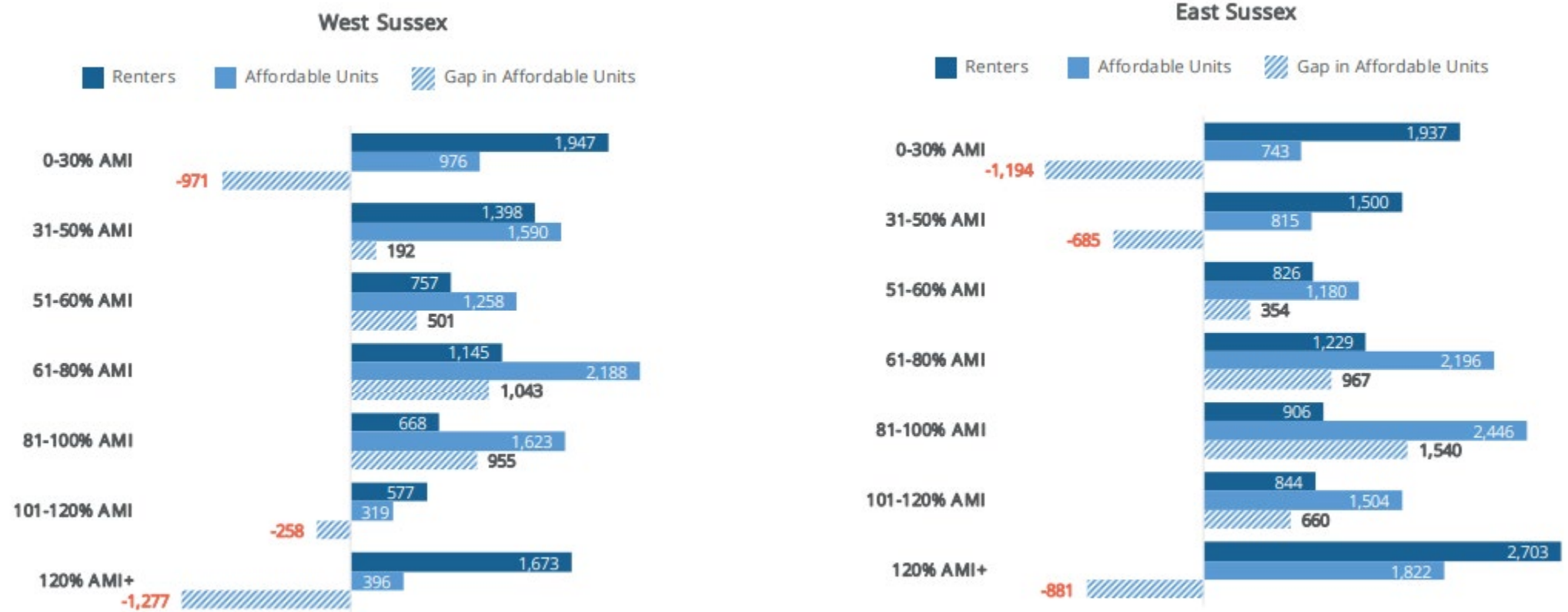


5,200
rental units



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

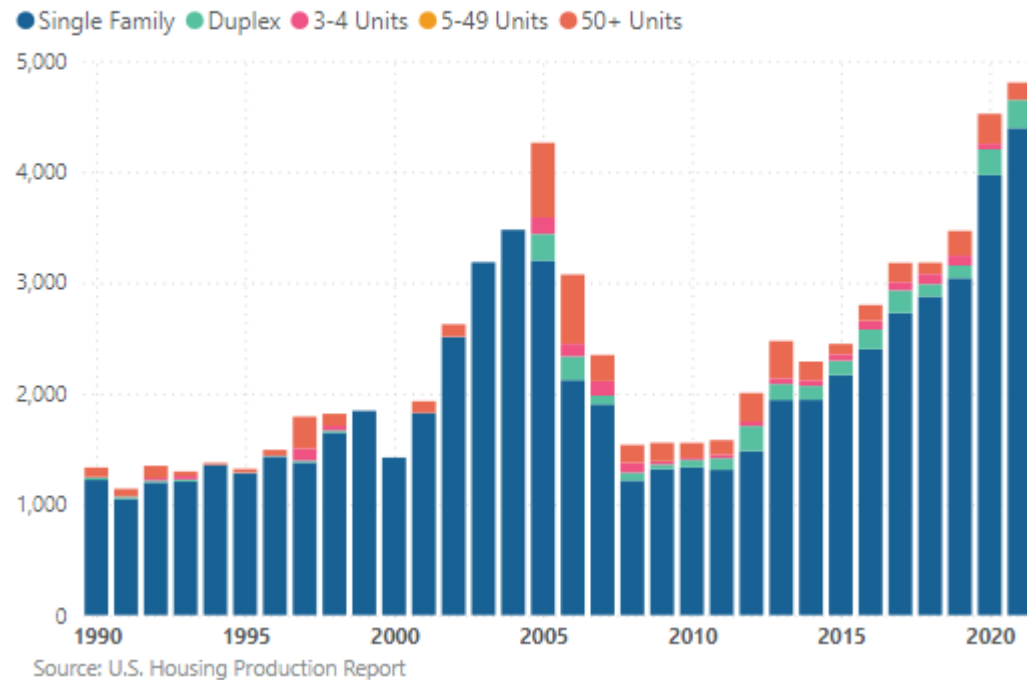
Housing



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.

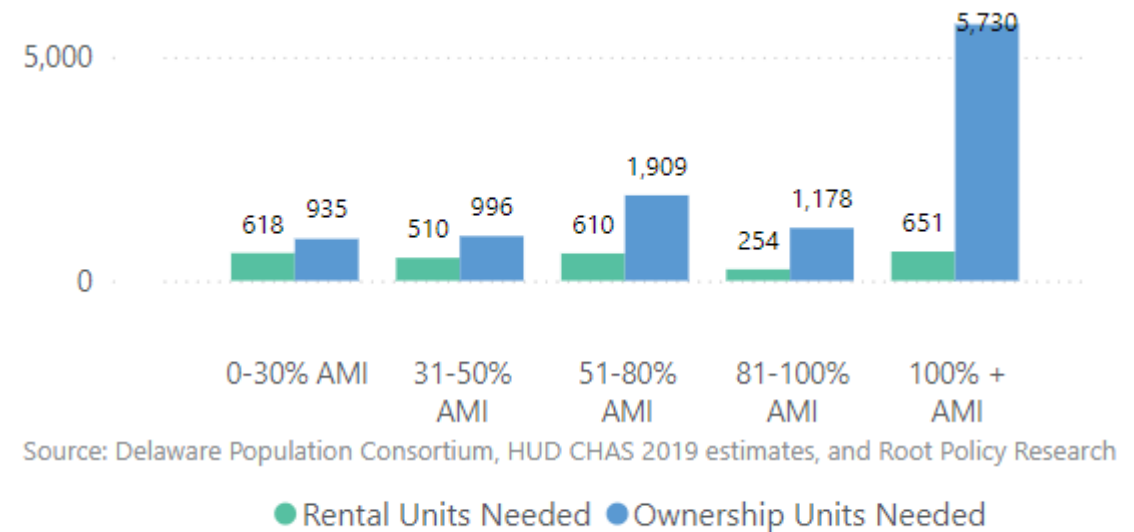
Housing – Sussex County

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



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:



Total: 13,392 needed, of which:

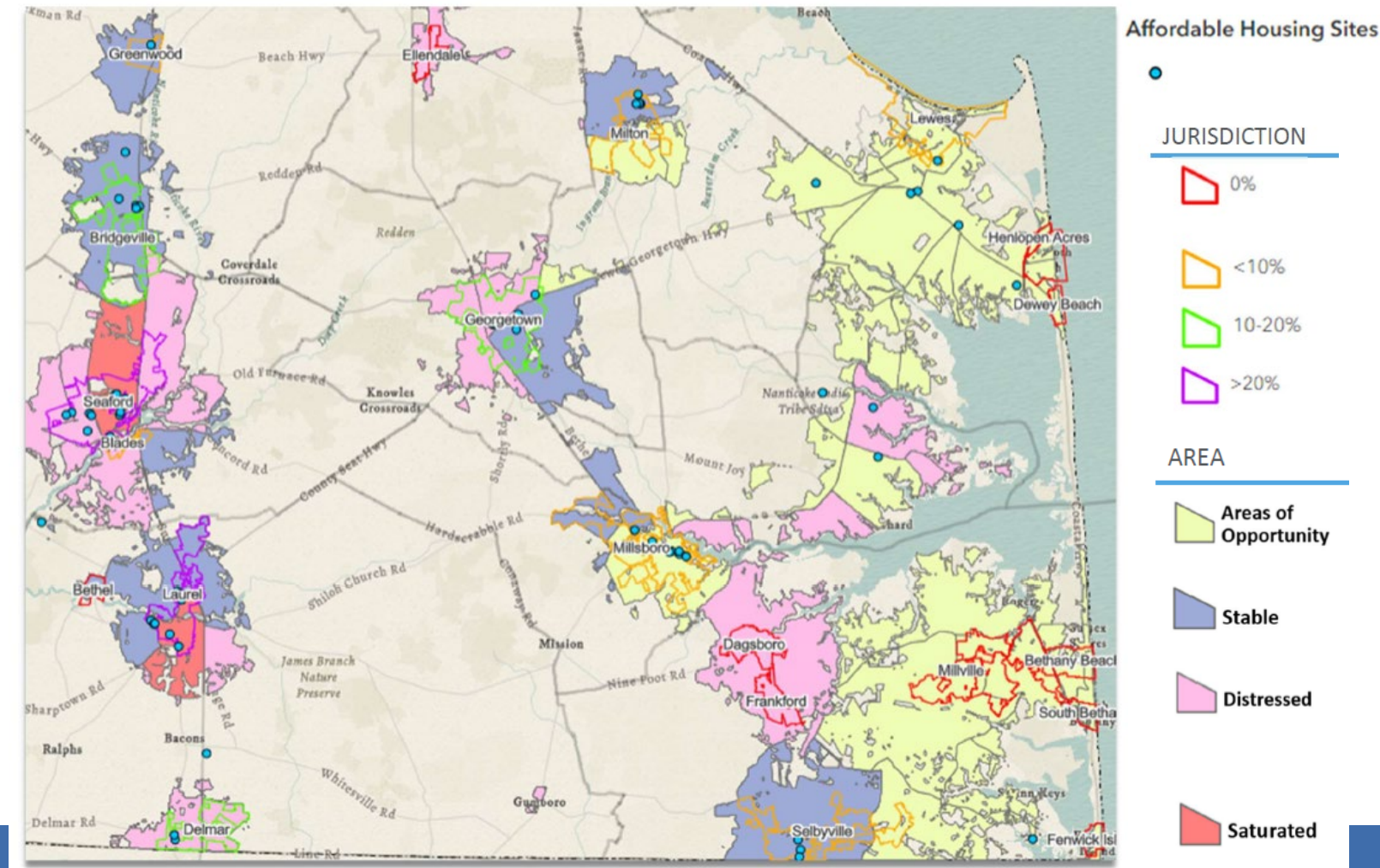
- 80% should be for homeownership
- 20% should be for renters

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

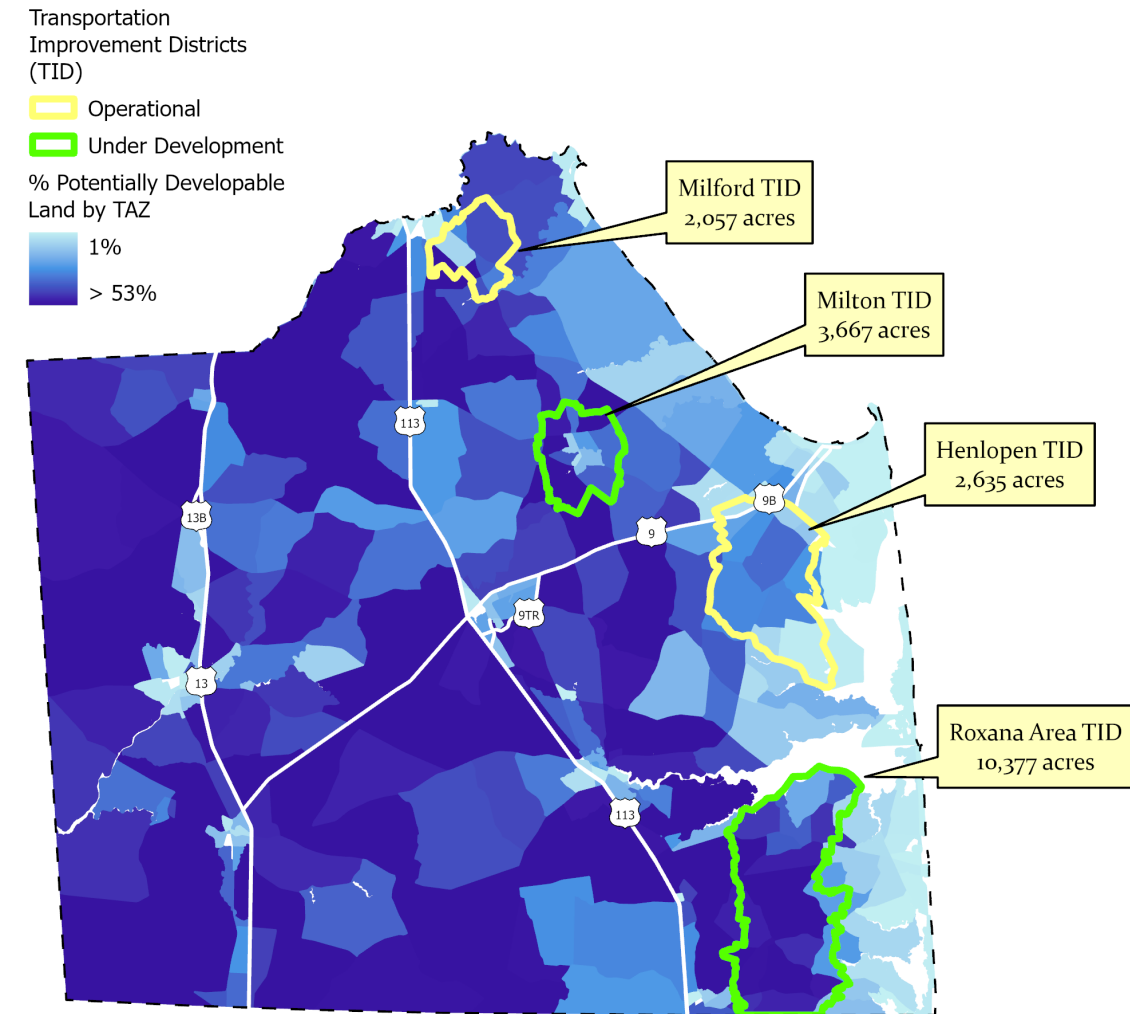
Conclusions and Discussion

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