

2018 Report on State Planning Issues

Prepared for the
Governor Carney and the 149th General Assembly

Prepared by the
Cabinet Committee on State Planning Issues

October 2018

United States
**Census
2020**

Use a blue or black pen.
Start here

The Census must count every person living in the States on April 1, 2020.
Before you answer Question 1, count the people in this house, apartment, or mobile home using one of the following methods:
• Count all people, including babies, who live and sleep here most of the time.
• The Census Bureau also conducts counts in group quarters, such as college dormitories, away either at

The cover design features a photo illustration of a historic Census tally from Delaware, a mock-up of the 2020 Census, and a map of the Apportionment of the U.S. House of Representatives based on the 2010 Census.

ACKNOWLEDGEMENTS

Governor

John Carney

Cabinet Committee on State Planning Issues

Chairperson

Secretary Jennifer Cohan Department of Transportation

Committee

Secretary Michael Scuse	Department of Agriculture
Secretary Susan Bunting	Department of Education
Secretary Shawn Garvin	Department of Natural Resources and Environmental Control
Secretary Robert Coupe	Department of Safety and Homeland Security
Director Damian DeStefano	Division of Small Business
Director Michael S. Jackson	Office of Management and Budget
Director Constance Holland	Office of State Planning Coordination
Director Anas Ben Addi	State Housing Authority

Delaware Office of State Planning Coordination

Constance Holland, AICP, Director
Tricia Arndt, Planner
Stephen Bayer, Planner
Temple Carter, Planner
David Edgell, AICP, Planner
Dorothy Morris, AICP, Planner
Miriam Pomilio, Planner

This report has been prepared by the Delaware Office of State Planning Coordination (OSPC), in concert with and on behalf of the Cabinet Committee on State Planning Issues, in accordance with Delaware Code Title 29, Chapter 91. The Cabinet Secretaries and state agency staff provided data, ideas, expertise, and editorial comments to the OSPC staff to assist in the preparation of this report.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
Projects and Work Plan Highlights	2
INTRODUCTION	7
GOVERNOR JOHN CARNEY’S ACTION PLAN FOR DELAWARE	8
Education.....	8
Economy	8
State Budget	9
Environment	9
Agriculture.....	10
STATE PLANNING POLICIES AND PROGRAMS SUPPORT GOVERNOR CARNEY’S ACTION PLAN FOR DELAWARE	11
OVERVIEW OF STATE PLANNING IN DELAWARE	13
The State Role in Land Use Planning	13
Delaware Land Use Planning Overview	15
STATE OF DELAWARE LAND USE PLANNING STRUCTURE.....	16
Cabinet Committee on State Planning Issues.....	16
Office of State Planning Coordination	16
The Strategies for State Policies and Spending	17
Delaware State Strategies for Policies and Spending Investment Levels	18
DATA AND TRENDS THAT INFLUENCE PLANNING	19
Census Data Drives Planning Decisions.....	19
Key State Investments	26
Development Trends Analysis.....	29
PLANNING PROJECT HIGHLIGHTS AND WORK PLAN	32
Downtown Development Districts	32
Neighborhood Building Blocks Fund.....	35
Opportunity Zones	36
Planning Healthy Communities	37
Key State Investments	44
Development Trends Analysis.....	44
Strategies for State Policies and Spending.....	44
Census State Data Center	45
Delaware Population Consortium	45
Geospatial Coordination.....	46
State Land Inventory	49
University of Delaware Collaboration	50
Local Planning Activities and Collaboration	51

Preliminary Land Use Service	53
School Site Selection	54
Annexation Plan of Services Review.....	54
Metropolitan Planning Organization Coordination	55
The OSPC Website Redesign	56
Master Planning Activities	57
Climate Resiliency and Adaptation.....	59
Delaware Bayshore Initiative	62
DelDOT Long-Range Transportation Plan.....	67
APPENDIX A: DEVELOPMENT TRENDS DATA AND ANALYSIS	A1
APPENDIX B: STATE FINANCIAL INVESTMENTS SUPPORTING RECENT TRENDS	B1
APPENDIX C: DEMOGRAPHIC DATA	C1
APPENDIX D: COMPREHENSIVE PLANNING PROGRESS	D1
APPENDIX E: HIGHLIGHTS FROM LOCAL JURISDICTIONS ANNUAL REPORTS	E1
APPENDIX F: DOWNTOWN DEVELOPMENT DISTRICT TABLES	F1



STATE OF DELAWARE
EXECUTIVE DEPARTMENT
OFFICE OF STATE PLANNING COORDINATION

October 2, 2018

Dear Governor Carney and the Members of the 149th General Assembly,

On behalf of the Cabinet Committee on State Planning Issues, I am pleased to present the 2018 Report on State Planning Issues. The Office of State Planning Coordination (OSPC) prepares this report on behalf of the Committee, in accordance with the Delaware Planning Act (29 Del. Code Ch. 91).

The Committee serves as an advisory body to promote the orderly growth and development of the state, including recommending desirable patterns of land use and the location of necessary public facilities. In essence, the mission of the Committee is to align the state's provision of infrastructure and services with local governments' land use decisions.

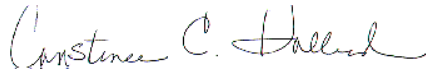
This report summarizes data on key state investments in infrastructure and services; provides a detailed analysis of residential and commercial development trends; and highlights planning accomplishments of local governments. The report also showcases the Committee's efforts this year, along with future collaborative efforts to promote prosperity and orderly growth. Here are just a few of the initiatives detailed in the report:

- **2020 Census:** In light of the upcoming decennial count, the OSPC has chosen to highlight preparations for the decennial census, along with other demographic data collection efforts, and how this information is used in planning.
- **Farm and Food Policy Council:** The newly formed Delaware Council on Farm and Food Policy will ultimately help Delawareans to access local and nutritious foods and achieve healthier lifestyles. The Council will advise Delaware's Secretary of Agriculture on policy, project development, resource priorities, and implementation strategies to achieve its goals.
- **Opportunity Zones:** Delaware now has 25 census tracts designated as Opportunity Zones by the U.S. Department of the Treasury. These Opportunity Zone designations will help build on ongoing community development efforts across Delaware and encourage additional private investment where it can have the most impact—in economically-distressed communities.
- **Government Efficiency and Accountability Review (GEAR):** Under the GEAR umbrella of improving government services, efforts are underway to develop a single authoritative database of all state property details in order to optimize use of holdings. This intersects with a broader GEAR initiative to coordinate all geospatial data statewide using FirstMap, the state's enterprise geographic information system. Another GEAR recommendation discussed in the report is legislation to codify and support the Delaware Population Consortium.

- **Master Plans:** This method of planning leads to predictability, economic development, and efficient infrastructure investments. Coordinating transportation improvements with land development activities can lower infrastructure costs and foster planning for market-ready development and redevelopment opportunities.
- **Climate Resiliency and Adaptation:** State agencies represented on this Committee are on the forefront of preparing Delaware's communities for climate change. Collaborative efforts to provide information, technical expertise, and funding to local governments are presented herein.

There are many other agency accomplishments, planning updates, and useful information contained in the body of this report and its appendices. I am proud of how our state agencies are working together and coordinating with local governments to meet the needs of our citizens and visitors. Please read on to appreciate this Committee's dedication to enhancing Delaware's future. Thank you for the opportunity to share this information with you and to serve this great state.

Sincerely,

A handwritten signature in cursive script that reads "Constance C. Holland".

Constance C. Holland, AICP

Director, Office of State Planning Coordination

EXECUTIVE SUMMARY

The Delaware Office of State Planning Coordination (OSPC), on behalf of and in collaboration with the Cabinet Committee on State Planning Issues (CCSPI), is pleased to present the 2018 Report on State Planning Issues as required by Delaware Code Title 29, Chapter 91 § 9101 (d). The purpose of the report is to update the Governor and General Assembly on recent planning trends and activities that can influence and improve the general pattern of land use within Delaware.

Governor John Carney's "Action Plan for Delaware," which embodies his vision for Delaware is well underway. This report begins by noting achievements in education, the economy, the state budget, the environment, and agriculture, and later describes the many planning policies and actions that will build upon his administration's goals.

In light of the pending 2020 count, the OSPC has chosen to highlight the decennial census, and other demographic data collection efforts in this year's annual report, and how this information is used in planning.

Recent data and trends highlight the fact that Delaware is growing, and the composition of our population is changing. Delaware is growing faster than the national average and any of the surrounding states. Delaware's percentage of adults over 65 years old is higher than the national average. Data collected, and discussed within the body and appendices of this report, help paint a fuller picture of how our communities are growing and changing.

According to the analysis of development approvals, last year 2,855 new residential units were approved, over 60 percent of which were in New Castle County. This is substantially more than the same time frame in 2016, when the statewide total was 1,660 new units. Development approvals are granted well before actual construction begins and therefore are considered to be somewhat speculative in nature.

In contrast, building permit data are a solid indication of development occurring. Analysis of last year's building permit data shows that permits were pulled for 6,331 new residential units statewide. The majority, however, were in Sussex County, which accounted for almost half the total (3,055 units).

State agencies and planning partners are working together to accommodate this growth and to ensure that investments in education, economic development, infrastructure, agriculture and environmental protections are implemented efficiently. Collaboration between the State, its agencies, and local governments are essential given that the state government funds or provides a great deal of

infrastructure and services, many of which are provided at the local level in other states.

The following are the highlights of these collaborative efforts.

Projects and Work Plan Highlights

Data, Demographics, and Trends – The OSPC tracks and analyzes census data, demographics, population projections, and development trends.

Work Plan

- ☐ Function as Census State Data Center.
- ☐ Serve on Delaware Population Consortium.
- ☐ Collect and analyze development trends annually.
- ☐ Analyze key state investments in infrastructure and services annually.

Downtown Development Districts (DDD) – The OSPC manages the DDD application process, monitors compliance with program requirements, and provides technical assistance to DDDs.

Work Plan

- ☐ Monitor compliance and offer technical assistance.
- ☐ Collaborate with the Delaware State Housing Authority (DSHA) and others to implement the program.
- ☐ Prepare application and manage process when the Governor opens next round of designations.

Neighborhood Building Blocks Fund (NBBF) – The OSPC director serves on the board of this grant fund that supports crime prevention and community revitalization.

Work Plan

- ☐ Collaborate with the Delaware Department of Justice (DDOJ), DSHA, and Division of Small Business on programs that support community revitalization.
- ☐ Review applications as assigned and monitor progress of applicants as they implement the grants, complete deliverables, and request reimbursement.
- ☐ Promote this fund for use by towns in planning activities to reduce crime and revitalize neighborhoods should there be another round of grant applications announced by the Board.

Opportunity Zones – Federal tax incentive program to encourage private investment in economically distressed communities throughout the state.

Work Plan

- ☐ Continue to assist the Office of the Governor as needed in developing outreach materials, website content, and map applications.
- ☐ Coordinate with local municipalities to share program details and contribute to successful implementation.

Planning Healthy Communities – Improving the quality of the built environment to have a positive impact on the ability of people to improve their health by walking, biking, going to parks, and accessing healthy foods.

Work Plan

- ☐ Continue to serve on these committees and promotes collaboration and data sharing.
- ☐ Upload the statewide health mapping GIS data, developed through the Plan4Health grants, to FirstMap to make these resources available to the public and other agencies.
- ☐ Promote sections focused on healthy communities in local government comprehensive plans and continue to conduct other public outreach efforts to raise the awareness of the link between planning and public health.
- ☐ Evaluate our comprehensive plan checklist and guidance document and add more information about healthy community planning.
- ☐ Collaborate with the Division of Public Health to provide health-related comments through the Preliminary Land Use Service (PLUS) process using the checklist developed by the Delaware Coalition for Healthy Eating and Active Living (DE HEAL) in consultation with OSPC.

Geospatial Coordination – The OSPC leads the efforts to coordinate geospatial (GIS) data statewide, including for FirstMap, the State’s enterprise GIS system.

Work Plan

- ☐ Lead Government Efficiency and Accountability Review Board (GEAR) effort to improve data integration and mapping efforts.
- ☐ Coordinate with Department of Technology and Information (DTI) and other users to upgrade and enhance FirstMap.
- ☐ Pursue a dedicated funding stream to allow for regular collection of data with statewide importance.
- ☐ Coordinate with federal data partners.
- ☐ Serve as chair of the Delaware Geographic Data Committee.

State Land Inventory – The OSPC has been tasked through by GEAR to improve the current State Land Inventory process by establishing a centralized database with all agency real property data.

Work Plan

- ☐ Coordinate with all agencies who purchase, own, or lease real properties to define their processes and develop a path forward.
- ☐ Coordinate and lead a Business Case through DTI to develop and design a centralized database to house all agency data without changing agency workflow.
- ☐ Maintain a single authoritative dataset available to all state agencies for more efficient management and informed decision making; such as, examining temporal relationships to identify potential environmental threats (i.e., sea level rise) or optimizing future land use.

University of Delaware Collaboration – The OSPC continues to have a strategic partnership with the University of Delaware’s Institute for Public Administration (IPA); together we work on projects to advance planning in Delaware.

Work Plan

- ☐ Maintain an “on-call” contract with IPA to assist with data analysis, GIS mapping, planning research, and report development needs that arise throughout the year.
- ☐ Develop a scope of work to expand the “Comprehensive Plan Database” to include more information and documents about local government comprehensive plans.
- ☐ Implement an information technology (IT) plan to move the database and website from UD to state servers.
- ☐ Follow up from June 11 retreat to develop strategic initiatives related to data driven planning, comprehensive plan implementation, and other topics as discussed.

Local Planning Activities and Collaboration – The OSPC Circuit Rider Planners provide technical assistance to local governments preparing comprehensive plans and help guide local governments through the review and certification process.

Work Plan

- ☐ Assist local governments with technical planning assistance and the review process for comprehensive plans. Currently, 22 towns and all 3 counties are in some stage of the planning process.

Preliminary Land Use Service (PLUS) – The OSPC leads this monthly review process for major development proposals and comprehensive plans. All relevant state agencies are engaged to comment on proposals through this process.

Work Plan

- ☐ Manage the PLUS Process by processing applications on a monthly basis, mapping and distributing those applications to state agencies, conducting monthly PLUS meetings, preparing and distributing comment letters for all applications, and receiving response letters from applicants.
- ☐ Coordinate with agency partners to streamline the review process and enhance the effectiveness of the program.

School Site Selection – The OSPC leads the review and approval of new school sites, which must be approved by the Office of Management and Budget (OMB), Delaware Department of Education (DDOE), and the OSPC director.

Work Plan

- ☐ Lead the school site selection and review process to ensure that all new school sites are consistent with the *Strategies for State Policies and Spending*.
- ☐ Assist school districts with site selection using professional planning assistance and GIS mapping, if requested by the district.
- ☐ Review all proposed school sites through the PLUS process.
- ☐ Work with municipalities to encourage them to reserve land for school sites in their comprehensive plans and to have supportive zoning regulations for school construction.
- ☐ Look for opportunities to reserve school sites within development projects, where applicable.

Annexation Plan of Services Review – As per Delaware Code, the OSPC reviews plan of services for all municipal annexations to ensure that local governments can serve annexed areas with utilities and public services.

Work Plan

- ☐ Work with municipalities to develop plan of service applications, write plan amendments for potential annexations to meet code, and map municipal boundary changes in response to approved annexations.

Metropolitan Planning Organization (MPO) Coordination – MPOs are federally designated agencies that coordinate transportation planning in certain areas. There are three MPOs in Delaware, and OSPC serves on various committees for each.

Work Plan

- ☐ Participate as members of the various committees and working groups of all three Delaware MPOs.
- ☐ Advocate for coordination among the MPOs, the Delaware Department of Transportation (DelDOT), and the local governments to better incorporate transportation and land use planning through comprehensive plans.

- ☐ Participate in MPO-sponsored planning studies and identify transportation issues in local government comprehensive plans that could form future studies.

Climate Resiliency and Adaptation – The OSPC participates with Delaware Department of Natural Resources and Environmental Control (DNREC) and other agencies to address climate resiliency and adaptation in comprehensive plans and other programs.

Work Plan

- ☐ Review state projects with climate change and sea level rise as a factor.
- ☐ Coordinate with DNREC to assist local municipalities with comprehensive plan updates to achieve resiliency, sustainability, and ecotourism goals.

DelDOT Long-Range Transportation Plan (LRTP) – The OSPC provides support to DelDOT in the process of updating the LRTP.

Work Plan

- ☐ Participate in DelDOT LRTP effort as requested including master plans and Traffic Improvement Districts (TIDs).
- ☐ Share demographics, development trends, key investments, and other data to inform DelDOT's planning effort.
- ☐ Share LRTP efforts and the final plan with local governments so they can use the information as they develop their comprehensive plans.

Please read the full report for more detailed information on these planning programs and policies. Additional data, maps, and graphics can be found in Appendices A through F.

INTRODUCTION

The 2018 Annual Report on State Planning Issues was prepared by the Delaware Office of State Planning Coordination (OSPC) on behalf of and in conjunction with the Cabinet Committee for State Planning Issues (CCSPI).

Highlighted herein are planning efforts at the state and local level, recent accomplishments, and a brief work plan. The report also takes a deeper dive into demographic data used in planning, with a focus on the importance of the upcoming Census and the relevance of the decennial count.

Additionally, the report contains information about development activities and state investments in infrastructure and services, as well as the data and trends that influence these planning decisions.

Prior to taking office, Governor John Carney unveiled his administration's "Action Plan for Delaware," thereby charting the course for the State's planning agenda. This year's report begins with a recap of that action plan, and accomplishments thus far; followed by discussion of how state planning policies support his vision for a thriving and prosperous state.

Read on to see how state agencies have been working together with local governments and planning partners to revitalize our communities and foster economic development, and to balance prosperity with preserving our natural and cultural resources.



Governor Carney at the Opening of the Grade Separated Intersection at State Route One in South Frederica

GOVERNOR JOHN CARNEY'S ACTION PLAN FOR DELAWARE

Education

“All Delaware students deserve a quality education and an equal opportunity to succeed.”

Investing in Delaware's economy starts with providing a quality education for Delaware's children. Governor Carney believes Delaware must strengthen our education system by giving educators and students the resources they need to be successful, particularly students from disadvantaged backgrounds. *Here's what we have accomplished so far:*

- ☐ Refocused the Department of Education to support school districts and their students.
- ☐ Targeted new resources through the Opportunity Grants program to schools serving the highest populations of low-income students and English learners.
- ☐ Offered student loan incentives to recruit teachers in high-needs schools and subject areas.

Economy

“The stability and security of every Delaware family depends on access to quality, good-paying jobs.”

More Delawareans are working than ever, and job creation in Delaware is outpacing our neighboring states. But our economy is evolving every day, and we have more work to do. In the past decade, Delaware has lost industrial sites that provided good-paying jobs for years—the General Motors plant in Newport, the Claymont Steel Mill, the Nylon plant in Seaford, and the Chrysler factory in Newark. Governor Carney believes Delaware must embrace the transition to an innovation economy, and government must adjust to support entrepreneurs and foster innovation across Delaware. *Here's what we have accomplished so far:*

- ☐ Partnered with the private sector through the Delaware Prosperity Partnership to bring additional resources and talent to the business of economic development.
- ☐ Designated 25 census tracts to be eligible for federal tax incentives; these “Opportunity Zones” will spur private investment in low-income communities across the state.

- ☐ Passed legislation to revitalize abandoned industrial sites to put Delawareans back to work.
- ☐ Passed legislation authorizing tax credits for investors in Delaware-based, scientific-oriented small businesses.
- ☐ Improved broadband access for students, families, and businesses across Delaware.
- ☐ Authorized \$10 million to preserve farmland statewide, and protect Delaware's family farmers who contribute to our \$8 billion agricultural economy.
- ☐ Partnered with DuPont and the University of Delaware to open the Delaware Innovation Space, which provides lab space and state-of-the-art equipment for Delaware's innovators and entrepreneurs.

State Budget

“Delaware must get its financial house in order, so we can focus on making investments in education and the economy that help all Delawareans thrive.”

Delaware faces structural budget challenges, with expenses in areas like education and healthcare outpacing the growth of key revenue sources. Governor Carney is working closely with Democrats and Republicans in the General Assembly on structural budget reforms that address spending and revenue. *Here's what we have accomplished so far:*

- ☐ Passed two responsible, balanced budgets to invest in areas—such as education, the economy, and environmental protection—that will improve our state, while limiting ongoing, operational spending.
- ☐ Signed an Executive Order to limit government spending and pursue responsible, structural revenue reforms.
- ☐ Established the Government Efficiency and Accountability Review Board (GEAR) to make recommendations each year that will improve efficiency within state government.

Environment

“We must protect our environment so our children inherit a Delaware whose natural beauty is preserved.”

We must take decisive steps to protect Delaware from the threat of climate change and invest in our natural resources to improve public health, sustain and grow our tourism economy, and create new good jobs. *Here's what we have accomplished so far:*

- ☐ Invested one-time revenue to help municipalities upgrade their clean water infrastructure.

- ☐ Invested \$10 million in the preservation of farmland and open space statewide.
- ☐ Passed legislation to cleanup abandoned industrial sites.
- ☐ Joined other states in the Climate Alliance to uphold the goals of the Paris Agreement, and directly confront sea level rise.

Agriculture

“Delaware farmers are the backbone of our state’s economy, and we must protect our farmland for future generations.”

Delaware has a rich agricultural history, and the industry remains a key driver of Delaware’s economy, contributing \$8 billion in annual economic activity. Governor Carney believes Delaware must continue to invest in its farming industry, coordinating resources for small operations while improving nutrient management practices to help farmers protect our environment. Governor Carney also called for the creation of a deer management program to protect Delaware’s farms from crop damage in an effort to make family farms more profitable. *Here’s what we have accomplished so far:*

- ☐ Invested \$20 million in the preservation of farmland and open space statewide.
- ☐ Reduced permitting barriers for farm construction projects.
- ☐ Improved nutrient management practices to protect the environment.
- ☐ Promoted new agribusiness opportunities.



STATE PLANNING POLICIES AND PROGRAMS SUPPORT GOVERNOR CARNEY'S ACTION PLAN FOR DELAWARE

Governor Carney's Action Plan for Delaware charts the course for a Delaware that is prosperous and successful, and one that also retains the character and quality of life that everyone values. While there are a variety of programs and policies that are part of his action plan, many of them intersect with the built environment, land use, growth, or development, all of which are influenced by statewide planning activities.

The State's planning policies are aligned with Governor Carney's vision for Delaware and are an important tool to implement his Action Plan for Delaware. The *Strategies for State Policies and Spending* report is the key policy document that provides the framework for land use planning in Delaware. In summary, the *Strategies* direct agency spending on capital infrastructure and public services to areas of the state where both the State and local governments agree that growth and development should occur and direct agency spending on agricultural and natural resource preservation to areas that are to be preserved. The first version of this policy document was adopted and implemented in 1999, and it has been regularly updated, most recently in 2015. The OSPC is currently preparing for the 2020 update.

The implementation of the *Strategies for State Policies and Spending* supports the Governor's Action Plan by encouraging an efficient distribution of state fiscal resources and services in locations where they will provide the most benefits to Delawareans. For instance, the *Strategies* encourages efficient and effective infrastructure investments and service delivery, which aligns with the Governor's goals to improve the **state budget** by reducing waste and inefficiency. This also helps implement his goals to improve the **economy** by revitalizing vacant and underutilized sites and assisting small businesses. This is because the *Strategies* recognize that state investment in our urban and suburban areas (known as Investment Levels 1 and 2) improves these communities by leveraging other public and private investments. Investments in road improvements, parks, schools, public assistance, grant funds, and other state support are to be concentrated in our communities where they are needed most and benefit the most people. These investments also signal to the private sector to invest in economic development activities that provide jobs and housing.

Governor Carney's goals for **education** underscore his understanding that in order for students to do well in school they must not only go to schools that have the appropriate resources, but also live in safe, well-designed neighborhoods with a sense of community. Coordination among the OSPC, state agencies, and local government planning activities improves the quality of neighborhoods, housing, and economic opportunities to provide families with supportive environments. The OSPC and state agencies work with local governments to develop comprehensive plans that have strong neighborhood revitalization and affordable housing strategies. The local comprehensive plans are reviewed by the State and certified by the Governor to signify their alignment with state land use policies. In addition, programs such as the Downtown Development Districts program, the Neighborhood Building Blocks Fund, and efforts to improve public health through built environment strategies enhance these efforts and help ensure that all Delaware students get a quality education and have an opportunity to succeed.

Planning for Delaware's future is not just about urban and suburban communities, infrastructure, growth, and development. State planning policies focus equally on protecting Delaware's natural resources and protecting Delaware's agricultural economy, which serve to help implement Governor Carney's goals for the **environment** and **agriculture**. The *Strategies for State Policies and Spending* prioritizes natural resource protection and agricultural lands protection throughout the state in Investment Level 4 and Out-of-Play areas. State investments in infrastructure and services supporting growth and development are steered away from these areas in favor of investments in programs like agricultural preservation and open space protection. In addition, climate change adaptation and resiliency policies are embedded in agency planning, as well as the OSPC's outreach and assistance with local government comprehensive plans.

Whether it is education or the economy, agriculture or the environment, how well we plan for Delaware's future will impact the quality of life for generations to come. The OSPC and the state agencies are committed through our collaborative planning process to help make Governor Carney's Action Plan a reality.

OVERVIEW OF STATE PLANNING IN DELAWARE

The State Role in Land Use Planning

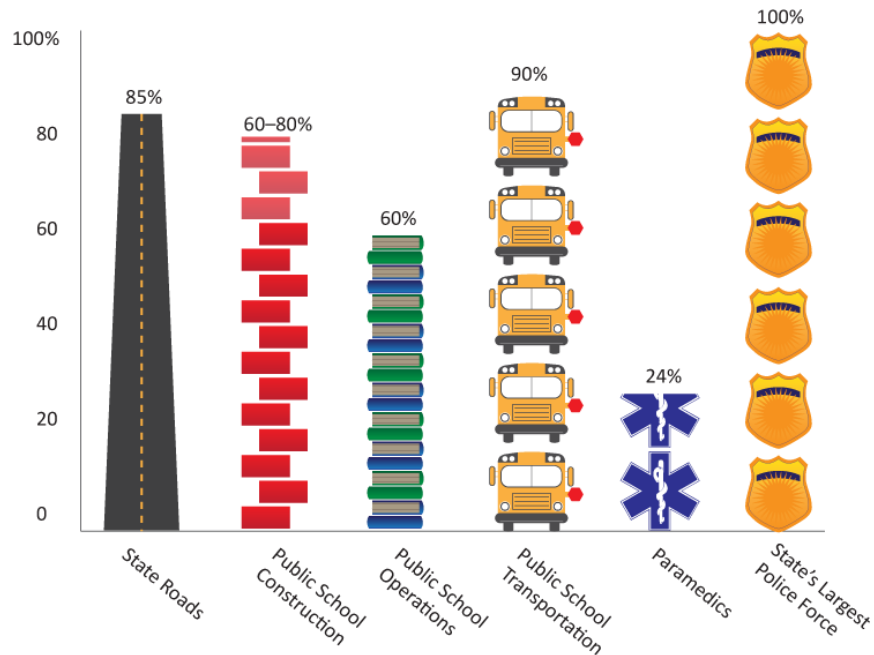
Delaware is growing and changing in population size, composition, and density. Though land use decisions are made by local jurisdictions (municipal and county), the impact of local government land use decisions, land development patterns, and each Delawarean's decision of where to live affects us all statewide. The effect can be felt fiscally—as taxpayers—and in the health, safety, and welfare of our state.

Unlike most other states, Delaware's state government provides many of the services and a great deal of infrastructure throughout the state:

- > **Roads and Other Facilities** — The State maintains approximately 85 percent of Delaware roads, as compared to a national average of 20 percent. This includes more than 13,954 lane miles; 1,722 bridges; 1,200 traffic signals; 49 park-and-ride facilities; and 146,484 signs.
- > **Schools** — The State provides approximately 60 percent of school operating funding and provides between 60 and 80 percent of educational-facility capital-construction funding, depending upon a local school district's relative property wealth.
- > **School Transportation** — The State provides 90 percent of school transportation costs.
- > **Police and Paramedic Services** — The State Police is Delaware's largest police force, and the State provides 24 percent of paramedic funding to local jurisdictions.

In addition to the services already mentioned, the State also provides the following:

- > **Service Centers** — The State funds 15 state service centers that deliver more than 160 programs and services on approximately 665,500 visits annually.
- > **Delaware Transit Corporation (DTC)** — In 2017, DTC provided more than 926,000 paratransit trips with 301 paratransit buses at a per-person cost to the State of approximately \$51, compared to more than 7.5 million fixed-route DART bus rides with 245 buses at approximately \$7 per person.



As illustrated above, Delaware's State government provides many services and infrastructure needs throughout the state.

The state government has a large stake in where and how land is developed, and as such, the cost of providing these services is greatly affected by our pattern of land use. In general, the more spread out we are, the costlier it is for taxpayers. Thus, for the state to allocate resources efficiently, we need to determine a clear path to our goal of conserving our fiscal and natural resources. If state and local governments are not working together, a great deal of waste and inefficiency can occur.

The State's role in land use planning has been recognized by the General Assembly for many years. In the past 30 years or so, a structure has been developed to enable and ensure coordination and collaboration between the State, its agencies, and local government planning efforts. The following is a summary of this process, followed by some details about state land use planning.

Delaware Land Use Planning Overview

- > Land use decisions are made at the county and municipal levels. However, the majority of infrastructure and services needed to support such decisions are provided by the state.
- > The guiding documents for land use decisions are the local comprehensive plans, which are reviewed at least every 5 years and updated at least every 10 years.
- > Comprehensive plans are legal documents with the force of law, requiring development to be consistent with certified comprehensive plans.
- > Comprehensive plans must be implemented within 18 months of adoption by amending the official zoning map(s) to rezone all lands in accordance with the uses and intensities of uses provided for in the future land use element of the comprehensive plan.
- > The state's overall guide to land use policy is articulated in the *Strategies for State Policies and Spending*, which is updated every five years.
- > Comprehensive plans are certified by the State as to their consistency with the state land use policies as articulated in the current *Strategies for State Policies and Spending*.
- > The Preliminary Land Use Services (PLUS) review process coordinates land use with local governments, whereby major land use change proposals (e.g., large subdivisions proposals, comprehensive plan amendments, and comprehensive plan updates) are reviewed by state agency representatives along with local government representatives and developers.
- > Master plans are land use plans focused on one or more sites within an area, which identifies access and general improvements. Local governments are encouraged to use master plans to implement specific concepts for areas outlined in their broader comprehensive land use plans.

STATE OF DELAWARE LAND USE PLANNING STRUCTURE

Cabinet Committee on State Planning Issues

One of the most significant actions in regard to improving the coordination of land use activities was the re-establishment of the Cabinet Committee on State Planning Issues (CCSPI) in 1994. The Committee's primary purpose is as an advisory body to promote the orderly growth and development of the state, including recommending desirable patterns of land use and the location of necessary major public facilities. In essence, the mission of the Cabinet Committee is to advise the Governor and General Assembly on coordinating the state's provision of infrastructure and services with the land use decision-making process that is controlled by local governments.

Office of State Planning Coordination

The Office of State Planning Coordination (OSPC) works closely with and prepares this report on behalf of the CCSPI. The OSPC's mission is the continual improvement of the coordination and effectiveness of land use decisions made by state, county, and municipal governments while building and maintaining a high quality of life in the state of Delaware.

The OSPC meets its mission through

- Coordinating state, county, and local planning efforts.
- Coordinating state agency review of major land-use-change proposals prior to submission to local governments.
- Researching, analyzing, and disseminating information concerning land use planning.
- Meeting the information and resource needs of all state agencies and local governments.
- Coordinating the spatial data and geographic information system (GIS) needs of state agencies and local governments.

The Strategies for State Policies and Spending

The *Strategies for State Policies and Spending* report is the key policy document that provides a framework for land use planning in Delaware. Developed by the Cabinet Committee on Planning Issues to fulfill its directives under Title 29, Chapter 91 of the Delaware Code, the *Strategies for State Policies and Spending* provide a framework for the infrastructure and service investments by state agencies. The *Strategies for State Policies and Spending* report is used in a variety of ways, including for state agency capital budgeting, PLUS reviews, school site reviews, and public facility locations. Local governments rely on this document for the preparation of comprehensive plans, especially as they relate to Titles 9 and 22 of the Delaware Code and are certified by the State as directed by Title 29, Chapter 91 of the Delaware Code. The *Strategies* were first developed in 1999 and are updated every five years, most recently in 2015. The OSPC is currently preparing for the 2020 update.

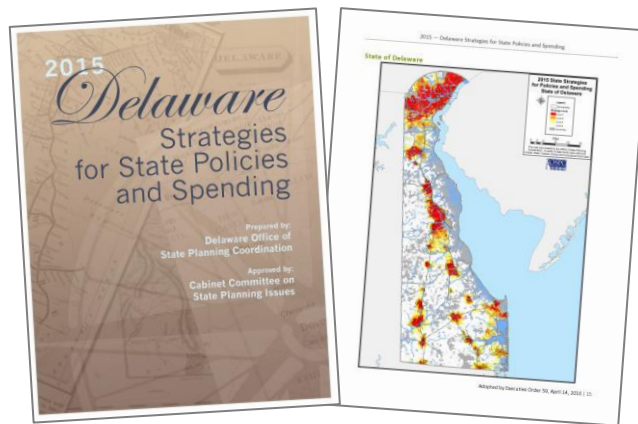
As a part of the planning effort that develops each edition of the *Strategies*, a statewide GIS mapping process is conducted. The mapping incorporates data layers from all certified county and municipal comprehensive plans, all state agencies, and relevant environmental and infrastructure data layers. The result is a map showing where all levels of government intend to invest in infrastructure and services to enable growth, as well as areas where preservation and agriculture are intended. The map identifies Investment Levels 1 through 4 (summarized below), which then serve to guide state investments.

State policies consider Investment Levels 1, 2, and 3 to be growth areas where infrastructure investments and public services are appropriate in accordance with the timing of growth. Investment Levels 1 and 2 are prioritized over Level 3, which as noted reflects longer-term growth plans. Investments in Investment Level 4 include agricultural preservation, open space, and natural resource protection.

Since 2008, the state has been collecting development data from local governments to track just how well these efforts are paying off. This information is provided in **Appendix A: Development Trends and Data Analysis**. The results are encouraging: From 2012 through 2017, 81 percent of the residential building permits and 93 percent of non-residential square feet permitted by local governments were within areas of Investment Levels 1, 2, and 3.

Delaware State Strategies for Policies and Spending Investment Levels

- > **Investment Level 1** – Mostly developed areas in municipalities or urbanized areas in the counties with higher density population and infrastructure, mixed-use development, and a variety of transportation options.
- > **Investment Level 2** – Less developed, but rapidly growing, suburban and urban areas where infrastructure is in place or planned for the near future.
- > **Investment Level 3** – Areas in longer-term growth plans, and/or areas within growth areas that have some environmental constraints. Although growth is planned here, infrastructure and other investments may be made further into the future.
- > **Investment Level 4** – Rural and agricultural areas, suitable for natural resource protection, open space, and agricultural use, including agricultural industries.
- > **Out-of-Play** – Areas not available for private development activity due to public ownership, conservation by private or nonprofit entities, or environmental constraints that will not allow development by law.



The Full 2015 Delaware Strategies for State Policies and Spending report is available online at www.stateplanning.delaware.gov/strategies/

DATA AND TRENDS THAT INFLUENCE PLANNING

Census Data Drives Planning Decisions

Understanding the rate of population growth and demographic changes are fundamental to adequate planning for housing, education, healthcare, public safety, and infrastructure. Federal and state governments appreciate the need for and uses of these data and expend considerable resources to collect and analyze the information. The U.S. Census Bureau is well-known for their 10-year counts. States rely upon this information, and multiple interim data sets, to ensure adequate services, resources, and infrastructure for their citizens. For example, data on age can identify population segments that require different types of services. To illustrate further, age cohorts can inform school enrollment expectations or the need for senior services.

In light of the pending 2020 count, the OSPC has chosen to highlight the decennial census, and other demographic data collection efforts in this year's annual report, and how this information is used in planning.

Decennial Census

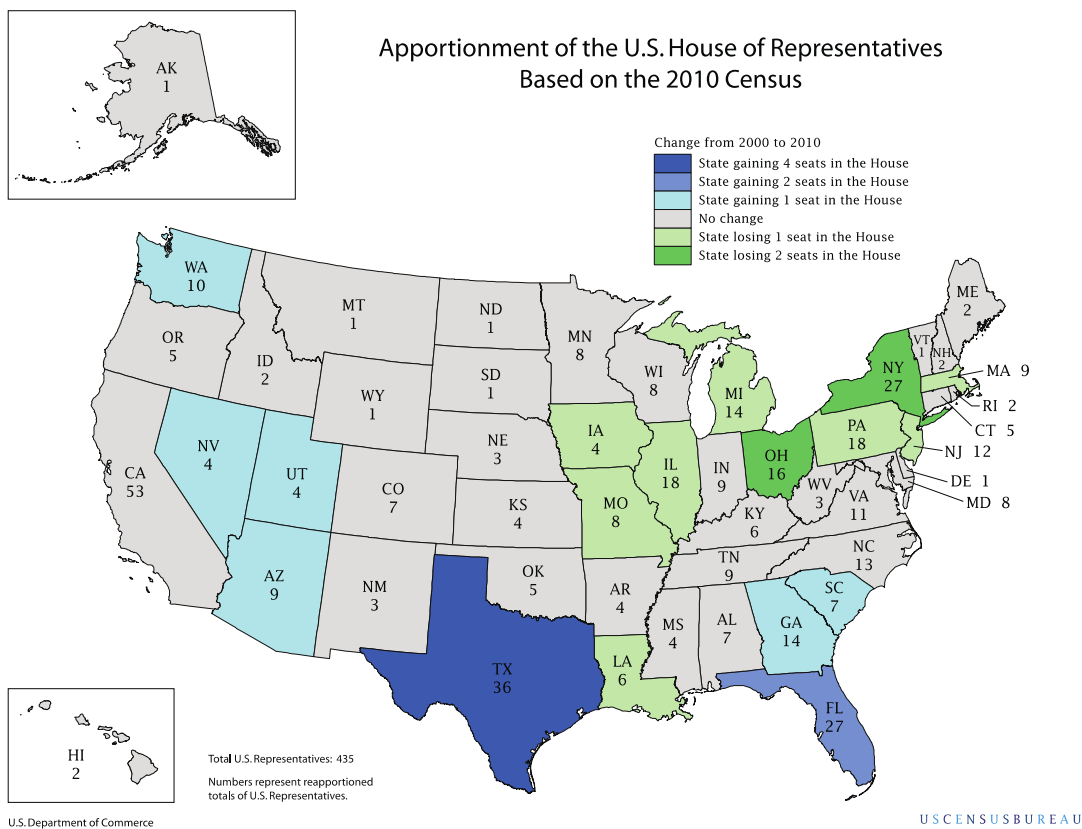
The federal government has been gearing up for the 2020 census. As one would expect, a tremendous amount of energy, nationally and locally, are required to tally all persons within the country. To aid in this effort, the OSPC has also been preparing for statewide implementation of the decennial count. The data collected will be used to influence or determine a vast array of decisions that will directly affect our state, and it is vital that we contribute to its implementation.

132 programs used Census Bureau data to distribute more than
\$675 billion in funds during fiscal year 2015.

Source: U.S. Census Bureau

History and Outcomes of Census Counts

The 10-year count was mandated within the U.S. Constitution (Article I, Section 2), and later codified within U.S. Code (Title 13, U.S. Code). The first census count occurred in 1790, and the count has occurred every 10 years since. At the conclusion of each decennial census, the results are used to calculate the number of seats in the U.S. House of Representatives to which each state is entitled. This method of dividing the 435 seats in the House is known as apportionment. Apportionment results are to be submitted to the President by December 31 of the census year. The map below shows the changes to the number of Congressional seats for each state as a result of differences between the 2000 Census and the 2010 Census.



Another important outcome is the potential changes to congressional districts. Redistricting is the process of revising the geographic boundaries of areas from which people elect representatives to the U.S. House of Representatives. Redistricting data are to be submitted to the states by April 1 of the year after the census. Delaware having only one at-large district has not been affected by this congressional re-districting. The data are also used to determine necessary changes to boundaries for state legislative districts.

Census Data Uses

Initially envisioned by the nation's founding fathers as a means to determine representation in Congress, the data now collected go far beyond just a population count. Information collected from the census is used to determine allocations of funds and services and to inform planning efforts at all levels of government. Census data are also used by businesses and industries to assess markets and economic trends, gauge labor markets, and guide expansion. Nonprofit and service organizations use the data to locate concentrated areas of their constituents.

Implementation Locally

As mentioned previously, the OSPC has a vital role to play in the 2020 Census. The OSPC serves as the Governor's liaison between the State of Delaware and the U.S. Census Bureau. As the State Data Center lead, the OSPC representative ensures state compliance with the Federal Memorandum of Agreement establishing a joint project between the U.S. Census Bureau and the State of Delaware. The representative disseminates Census Bureau communications to the State Data Center network and affiliates, and represents the State at Census Bureau meetings and functions. In addition, the OSPC responds to public inquiries regarding the Census and is a resource to local governments.

Complete Count Commission

The stated goal of the 2020 Census is "to count everyone once, only once, and in the right place." How does such a massive national directive get implemented locally? To encourage local participation, each state establishes a "Complete Count Commission," a network of government and community leaders who use their civic connections to generate awareness of the census. In Delaware, Governor Carney has signed Executive Order 23 to create Delaware's Complete Count Commission. The Order designates Lieutenant Governor Bethany Hall-Long as the chair and charges the Commission with assisting the U.S. Census Bureau in conducting the 2020 Census. The main charge of the Commission is to conduct outreach and coordination efforts with populations that have historically been undercounted.

This count could potentially have unprecedented implications. Based on the 2010 Census, Delaware's at-large congressional district had the second highest population of any congressional district (897,936, second only to Montana's 989,417). The least populous state with 2 districts was Rhode Island with a 2010 population of 1,052,931. As illustrated previously, changes in apportionment do occur based on census counts. Therefore, it is paramount that state and community leaders recognize the importance of an accurate count and comply

with future directives of the Complete Count Commission to encourage participation of all residents.

American Community Survey

The American Community Survey (ACS) is a nationwide survey designed to provide communities with a fresh look at how they are changing. The ACS replaced the decennial census's long-form questionnaire beginning in 2010. It is now used to collect long-form type information throughout the decade, rather than only once every 10 years. To do so, the survey is sent to a small subset of the population on a rotating basis. It generates demographic, social, housing, and economic estimates in the form of 1-year, 3-year, and 5-year estimates based on population thresholds.

The strength of the ACS is in *estimating* population and housing characteristics as these data can be less precise than those generated from the Census. It is important to note that estimates are more reliable for larger geographic areas with more people. This can be a challenge for most Delaware municipalities because smaller sample sizes (such as ACS responses from our lesser populated towns) can produce lower confidence intervals, meaning the margin of error is greater. As such, ACS data should be considered in conjunction with other more robust data sets. The infographic from the U.S. Census Bureau on the next page provides an overview of how ACS is collected and used.

Census Tools

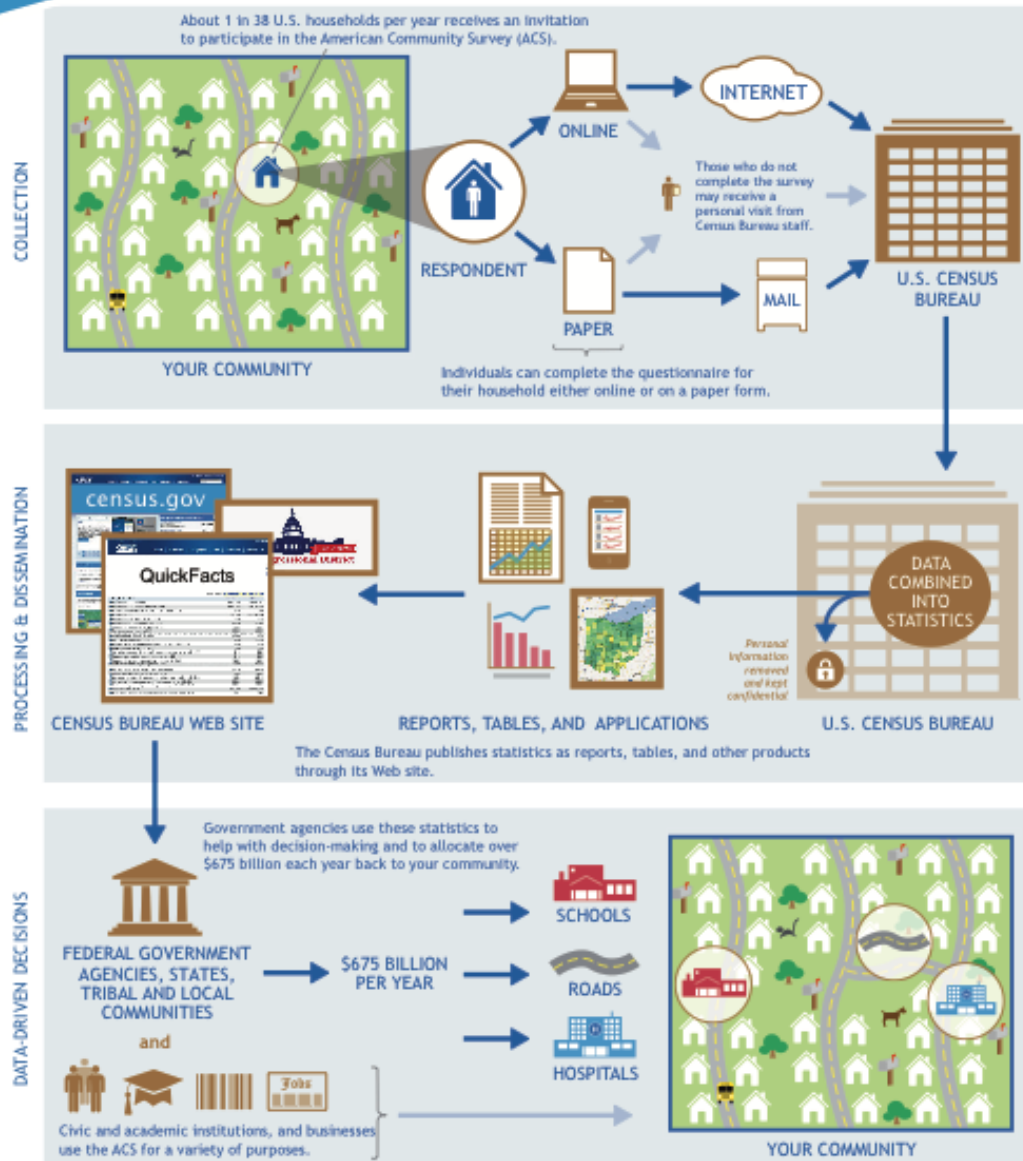
Information generated from the U.S. Census Bureau is voluminous and daunting. Luckily, there are numerous applications, websites, and search features to help pinpoint the region, data, and time series that best suits a particular need. This suite of tools can be useful for state and local planners, city managers, entrepreneurs, and so forth to guide land use planning, infrastructure upgrades, policy initiatives, housing, and economic development.

- > **American Fact Finder** is the search tool for the American Community Survey mentioned above. It features a step-by-step guide to accessing data on people, housing, industry, and the economy of a particular area or time series.
- > **Census Business Builder** caters to small business owners and entrepreneurs and provides data tailored to specific trade, retail, or business ventures.
- > **Census Flow Mapper** is an online map application that allows users to see in-bound, out-bound, and net migration in each county using data collected from the American Community Survey.
- > **DataFerrett** is an analysis tool that allows users to select and download local data into customized spreadsheets, maps, and graphs.

American Community Survey

How It Works for Your Community

The ACS is an official Census Bureau survey that is part of the Decennial Census Program. It is sent to a small percentage of U.S. households monthly.



For more information about the American Community Survey, please visit census.gov/acs.

Issued December 2017

United States[™]
Census
Bureau

U.S. Department of Commerce
Economics and Statistics Administration
U.S. CENSUS BUREAU
census.gov



Delaware Population Consortium

The Delaware Population Consortium (DPC) was formed in 1975, with the goal of “providing a continuing forum for debate and discussion of matters relating to state and local population growth.” The DPC is an informal organization with representation from state agencies, local jurisdictions, counties, and metropolitan planning organizations. The Center for Applied Demography and Survey Research (CADSR) at the University of Delaware (UD) has been the source for the DPC projections for decades. Projecting population is dependent upon the quality of the assumptions used. As new data become available, those projections can change. Understanding this, the DCP reviews projections annually and adjusts as necessary. The methodology used by the DPC is accepted by the demographic community and considered the most reputable source for population projections within our state.

The projections produced by the DPC are indispensable to many planning and forecasting processes throughout the state. Since 2014, the DPC has relied upon the metropolitan planning organizations (WILMAPCO, and the Dover/Kent County MPO) to fund the population projections from CADSR. Despite the crucial role the DPC plays in forecasting Delaware’s population, it has never been formalized or adopted by the state as the authority for population, housing, and employment projections. This year, the OSPC helped draft legislation to formalize and codify the DPC, in order to certify continued support for data analysis. Further, the legislation seeks to ensure consistency among state agencies and local governments by requiring growth forecasting to be based on DPC projections. It is hoped that the bill will be acted upon in the upcoming session.

Using the Data

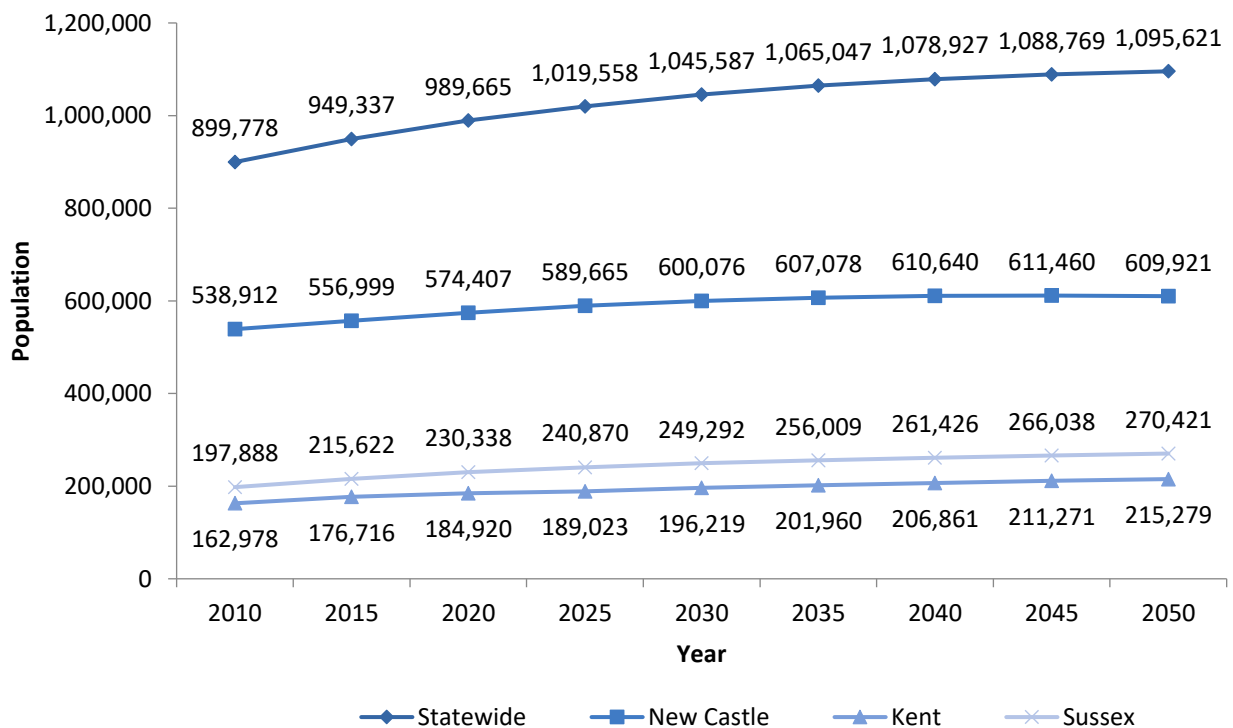
As one would expect, anticipated changes in demographics warrant careful consideration. Using the suite of data sets discussed previously can help generate a fuller picture of how our communities are growing and changing. Policy makers can use this knowledge to plan for those changes.

The Delaware of tomorrow could look rather different than the Delaware of today. Data trends show a population that is generally older. The DPC projections indicate that the percentage of school-aged children will gradually decrease from 19.7 percent in 2015 to 16 percent in 2050. During the same period the projections indicate that the percentage of adults 65 years old or older will increase from 14.4 percent to over 24 percent. Delaware is projected to become more diverse as well, with the white population projected to decrease from 65.3 percent in 2015 to 50 percent by 2050. (Please refer to [Appendix C: Demographic Data](#) for more detail on these data.)

How governments allocate funds are determined by where services and facilities are needed. Again, the demographic data and trends analysis are used to inform these decisions. School and infrastructure construction require planning and funding that need to be planned and budgeted for years in advance. As do public safety issues such as policing, paramedic services and disaster preparedness. Open space for agriculture, natural resources and recreation must also be protected for the livelihood and benefit of residents and visitors. How our state is allocating funds to help Delaware grow is summarized in the [Key State Investments](#) section below and discussed in greater detail in [Appendix B: State Financial Investments Supporting Recent Trends](#).

Finally, as our population grows, so must our housing stock. Delaware is projected to have 105,227 additional households between 2015 and 2050. Each household will need a place to live, resulting in the demand for about that many new housing units during the same period. Data collected on residential and non-residential growth is summarized in the [Development Trends Analysis](#) section below and discussed in greater detail in [Appendix A: Development Trends Data and Analysis](#).

Delaware County and State Population Projections, 2010–2050



Source: Delaware Population Consortium October 26, 2017

Key State Investments

In order to accommodate the needs of a growing population, protect the environment, and create a climate for economic development and job creation, the State makes many investments in infrastructure and public services. As has been previously mentioned, Delaware has a much larger role than many other states due to its small size and unique partnerships with local governments. It is often more efficient and cost effective to provide funding and services statewide, rather than at the local government level. Here are some areas where the State regularly makes significant investments to help Delaware grow:

Education

Delaware has nineteen local school districts. All districts receive funding from the State for both capital and operating expenses. Due to population growth and change, public school enrollment continues to rise in Delaware. Delaware schools served over 137,800 students in the 2017–18 school year, an increase of over 11,000 students (or 8.7%) since 2010.¹ The public-school student population is growing faster than the overall population, which increased only about 7.1 percent over the same time period according to estimates from the U.S. Census Bureau. The State spent approximately \$1.4 billion on public school operating costs in fiscal year (FY) 2018, roughly a third of Delaware's total General Fund budget. In addition, in FY18 the State spent over \$75.2 million on capital projects to maintain Delaware's schools, and \$57.2 million on land acquisition and new school construction.

Infrastructure

This past July, Governor Carney announced his support for expanding our digital infrastructure to increase wireless broadband access. The State will focus on enabling service to homes and businesses where broadband service is not readily available, particularly in rural Kent and Sussex Counties. Delaware will also prioritize low-cost services for lower income families to enable them to take full advantage of the internet, meeting needs that range from applying for jobs to completing homework assignments. To support this initiative, the Department of Technology and Information (DTI) issued a Request for Proposal (RFP) to solicit interest and plan options for providing affordable wireless broadband access for underserved and unserved residents in the rural parts of Kent and Sussex Counties. The RFP is scheduled to close mid-October with

¹ Public school enrollment for the 2009–2010 school year was 126,801; enrollment for the 2017–2018 school year was 137,873. Net increase was 11,072 students between the two years.

anticipated wireless coverage in the identified target areas within 18 to 24 months.

Transportation is a critical component of Delaware's infrastructure system, and as previously noted DelDOT is responsible for over 85 percent of Delaware's roads. With population growth and improving economic activity, the demands on this infrastructure is higher than ever. The number of vehicle miles traveled (VMT) is a measure of demand on the road system. Since 2010, the VMT in Delaware has increased over 1.6 billion miles-per-year. The number of licensed drivers and registered motor vehicles have also continued to increase, especially in the last five fiscal years. Perhaps due to the improving economy and/or historically low fuel prices, more people are driving and fewer people are taking transit. Rail, fixed route, and paratransit ridership have all decreased over the past five fiscal years despite some increases during the years of the great recession. In order to address these demands, the State spent just under \$234 million in capital funding for transportation projects in FY18, the highest expenditure in the past five fiscal years.

Since 2011, both DelDOT and DNREC have increased their efforts to provide infrastructure for non-motorized transportation in the form of trails and pathways. Numerous trail facilities have been constructed statewide providing both recreation and transportation options for a wide range of Delawareans. A total of over \$50 million has been allocated to trail and pathway projects between these two agencies since 2011.

Water and wastewater infrastructure are critical aspects of the built environment that must keep pace with a growing population and economy. It is also vitally important that these systems be updated in order to protect the environment. Local governments or private utility companies most often construct and operate these systems. The State, through the Water Pollution Control Fund, provides funding for utility providers to assist in constructing these necessary systems. In FY18, over \$10.9 million in state funds were paired with \$54.9 million in federal funds to provide over \$64.9 million to a range of utility providers statewide.

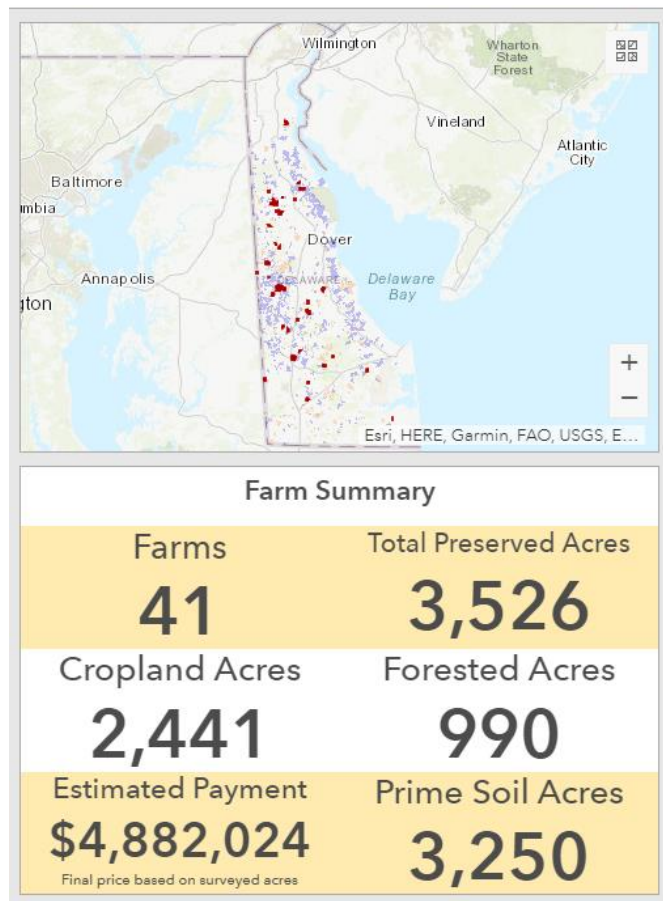
Public Safety

In Delaware, the State Police plays a very important role in protecting Delaware's citizens. The State Police provide specialized policing and investigative services to all of Delaware's other police agencies. In addition, the State Police is responsible for protecting Kent and Sussex residents that live in unincorporated areas and small towns that lack police departments. This represents approximately 58 percent of Kent County residents and 79 percent of Sussex County residents. In FY17, the budget for the State Police was approximately \$115.6 million.

The State also provides funding to the three counties to assist them with paramedic service. The State's share has been reduced from 30 percent to 24 percent in the past fiscal year, which represented \$10.8 million in FY17 (the most recent year of complete data available at time of publication).

Agriculture

The State has long had one of the best-regarded and most productive agricultural preservation programs in the nation. This program is critically important considering that agriculture is still Delaware's number one industry, and productive agricultural lands have been threatened by population growth, land development, and "suburban sprawl." In FY18 alone, the program preserved 41 farms comprising over 3,500 acres using a combination of state, federal, local and other funds totaling just over \$5 million. It is interesting to note that since the great recession, this program has been able to preserve more acres per dollar invested. Cost per acre for farmland easements peaked in FY07 at \$6,624 per acre, but has decreased to \$1,385 per acre in FY18. To view the [data dashboard](#) and [online map](#) of Agricultural Preservation in Delaware visit <https://agriculture.delaware.gov/agland-preservation-planning/reports/>.



Dashboard of Agricultural Preservation in Delaware

Environment

Community Water Quality Improvement Grants provide a source of funding for municipalities, nonprofit and community organizations, and homeowner's association to improve water quality through environmentally sound and cost-effective projects. In FY18, \$250,000 in state funds supported this program. Another program that seeks to improve water quality is the Nonpoint Source Program. Nonpoint source pollution can contaminate waterways from many diverse sources of run-off, and these funds are used for projects that mitigate these effects. In FY18, \$783,000 in state funds were paired with \$1.1 million in federal funds for a total of \$1.9 million for this program.

Housing

Quality, affordable housing is a necessary and desirable asset for any neighborhood. The Delaware State Housing Authority (DSHA) provides a number of programs to help Delawareans obtain housing. In order to enable more homeownership, the DSHA helped 963 home buyers with more than \$221 million in mortgage assistance in FY18. For those in the rental market, 1,405 low-income households were assisted with public housing units or vouchers and 230 new affordable rental units were created or preserved in FY18. To more broadly address community revitalization, the DSHA administers both the Strong Neighborhoods Housing Fund (SNHF) and the Downtown Development District rebate program. To date, the SNHF has distributed \$5.5 million to nine projects statewide with \$3 million allocated for FY19. The Downtown Development District program continues to be active, and in FY18, \$7.75 million in state funds leveraged projects totaling \$112 million in the eight designated districts.

Development Trends Analysis

The OSPC has been collecting building-permit and development-approval data from all 60 local jurisdictions since the start of 2008. The purpose of this reporting is to inform state, county, and municipal efforts to promote development activity around existing infrastructure and in compliance with comprehensive plans and the Strategies for State Policies and Spending. These data are unique in that they are collected and reported in a consistent way based on information gathered directly from all statewide jurisdictions that issue building permits and development approvals. It should be noted that “development approvals” are seen as more speculative in nature compared to “building permit” data because pulling a permit is done when construction is expected to start.

The locations of these development approvals are tracked using GIS and compared with the Strategies for State Policies and Spending maps. As

discussed earlier in the report, Investment Levels 1, 2, and 3 are considered “growth areas” where development activities are expected and encouraged.

Appendix A: Development Trends and Data Analysis includes a detailed evaluation of development activity in calendar years 2012 through 2017. Key findings include:

Development Approvals 2012 through 2017

- > During this period, local governments in Delaware approved a total of 17,724 residential units for future development. New Castle County jurisdictions approved the most units—8,402, or 47 percent of the total. Development approvals were the highest in 2012 when 4,043 units were approved statewide. This number has declined since 2012. The lowest amount of approvals occurred in 2016, with just 1,660 approvals statewide.
- > During this period, local governments approved 16,167 residential units in growth areas, defined as Investment Levels 1, 2, and 3 in the Strategies for State Policies and Spending. Overall, this represents 91 percent of all units approved in the state. A large majority of residential units approved in New Castle County (92%) and Kent County (94%) were in Levels 1 through 3. In Sussex County, 87 percent of residential units approved were located in Levels 1 through 3.
- > From 2012 through 2017, local governments approved nearly 14 million square feet of non-residential development. The majority of this development was approved in New Castle County (75%). The remainder was split between Kent and Sussex Counties, 20 percent and 5 percent, respectively.
- > Statewide, between 2012 and 2017, most of the non-residential development approved by local governments in Delaware (97%) was located in Investment Levels 1, 2, or 3.

Building Permits 2012 through 2017

- > During this period, local governments in Delaware issued building permits for 31,888 residential units. The majority of these permits were issued in Sussex County, where local governments issued permits for 15,363 residential units (48% of all units permitted in the state). Kent and Sussex Counties had a slight increase in residential building permit activity in 2017. A total of 6,331 residential building permits were issued statewide in 2017, which is almost double the number of permits issued in 2012 and the highest total in this six-year period.
- > Statewide, 81 percent of residential units permitted by local governments were located in Investment Levels 1, 2, or 3 as defined by the Strategies for State Policies and Spending. New Castle County

jurisdictions issued permits for 94 percent of their residential units in Levels 1 through 3, followed by Kent with 81 percent and Sussex with 73 percent.

- > From 2012 through 2017, local governments issued permits for almost 21 million square feet of non-residential development. Most of the activity (65%) was focused in New Castle County. Sussex County jurisdictions permitted 25 percent of the total, while Kent jurisdictions permitted the remaining 10 percent of non-residential development activity. In 2017, approximately 3.7 million square feet of non-residential space was permitted statewide.
- > Looking at non-residential permit activity, both Sussex and Kent Counties saw noteworthy declines in permitting activity from 2016 to 2017 (56% and 34% respectively), while New Castle County increased slightly.
- > Statewide, 93 percent of all non-residential square-footage was permitted in Levels 1 through 3.

Table 1 Residential Building Permits: Top Five Municipalities 2012–2017

Town	Permits, 2012–2017	Permits, 2017 Only
Wilmington	2026	306
Middletown	1171	333
Dover	1053	383
Millsboro	908	171
Millville	807	145

Table 2 Non-Residential Building Permits: Top Five Municipalities 2012–2017

Town	Square Footage, 2012–2017	Square Footage, 2017 Only
Middletown	2,171,121	359,929
Wilmington	1,190,977	130,718
Milford	1,043,865	-
Dover	996,109	152,027
Newark	570,754	269,826

PLANNING PROJECT HIGHLIGHTS AND WORK PLAN

The OSPC coordinates with numerous state agencies to provide the State and local governments with technical support, data, and resources for all aspects of planning. The following section highlights various projects spearheaded by CCSPI agencies, and outlines how the OSPC will support those efforts in the coming year. The OSPC-led initiatives are also summarized here, and a work plan is included.

Downtown Development Districts

In April 2014 the General Assembly passed Senate Bill 191, the Downtown Development Districts Act of 2014 (the Act), which was subsequently signed by the Governor on June 5, 2014. The Act created the Downtown Development District (DDD) program. The program seeks to revitalize the downtown Central Business Districts² in selected city, town, and county areas through the use of economic and other incentives. The purposes of the Act are to

- Spur private capital investments on commercial business districts and other neighborhoods;
- Stimulate job growth and improve the commercial vitality of districts and neighborhoods;
- Help build a stable community of long-term residents by improving housing opportunities; and,
- Assist municipalities in strengthening neighborhoods while harnessing the attraction that vibrant downtowns hold for talented people, innovative small businesses, and residents from all walks of life.

A variety of economic and other incentives were envisioned to achieve the purposes of the Act. The primary state-level incentive is the DDD rebate program. These rebates are to be made available to offset up to 20 percent of the hard costs associated with construction or redevelopment activities in DDDs.

The OSPC worked closely with the Office of the Governor and DSHA to research downtown revitalization strategies and develop the program. The OSPC's role is to manage the application and review process for district designations, monitor

² Central Business District: An area around the downtown portion of the city or town allowing for higher-intensity residential uses as well as commercial, office, personal services, governmental, and similar uses intended to serve the community and surrounding areas of the city or town.


compliance with the program requirements, review and process boundary and incentive revisions in conjunction with the CCSPI, and provide technical assistance to districts as needed. DSHA administers the DDD rebates.

There are eight designated DDDs: Wilmington, Dover, and Seaford (designated in January of 2015); and Smyrna, Harrington, Milford, Laurel, and Georgetown (designated in August of 2016). All of these municipalities offer a local incentive package that works in concert with the DDD rebate to encourage investment in each district. All of the districts work in concert with DSHA staff to actively market the DDD rebates and other incentives to developers and property owners in their communities.

Investments in Downtown Development Districts

[Introduction](#)
[Dover](#)
[Georgetown](#)
[Harrington](#)
[Laurel](#)
[Milford](#)
[Seaford](#)
[Smyrna](#)
[Wilmington](#)
[Resources](#)

Introduction

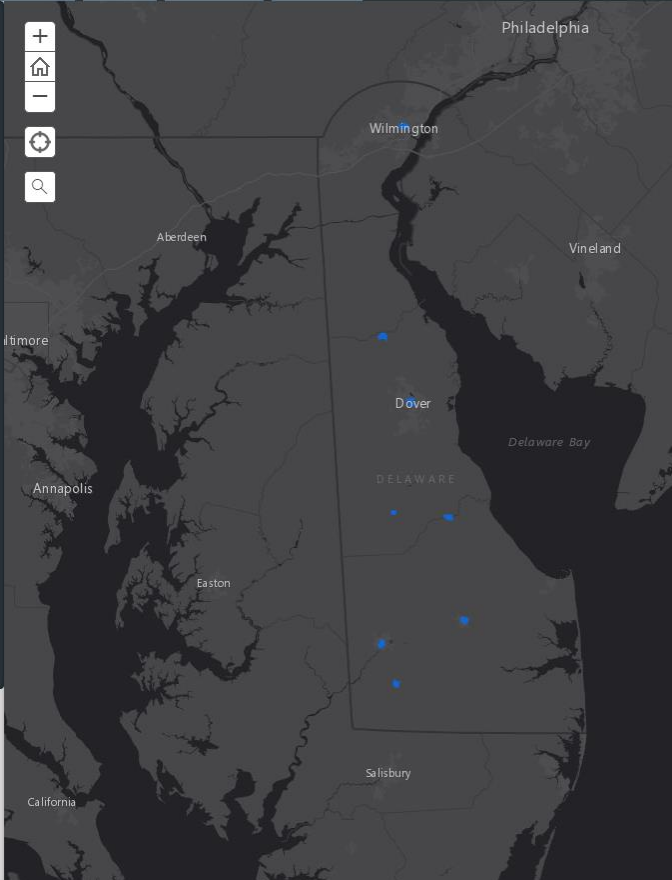


Healthy and vibrant downtowns are critical components of Delaware's economic well-being and quality of life. The [Downtown Development Districts \(DDD\) Act of 2014](#) was enacted by the General Assembly to leverage the resources of state government in a limited number of designated areas in Delaware's cities, towns, and unincorporated areas in a multifaceted effort to:

- Spur private capital investment in commercial business districts and other neighborhoods;
- Stimulate job growth and improve the commercial vitality of such districts and neighborhoods;
- Help build a stable community of long term residents by improving housing opportunities; and
- Assist municipalities in strengthening neighborhoods while harnessing the attraction that vibrant downtowns hold for talented people, innovative small businesses and residents from all walks of life.

In January 2015, the downtown areas of Seaford, Dover, and Wilmington were designated as Delaware's first three DDDs. In August 2016, five new Districts were announced. Smyrna, Milford, Harrington, Georgetown, and Laurel created Districts and local incentives.

The DDD Grant program is administered by the [Delaware State Housing Authority \(DSHA\)](#) in collaboration with the [Delaware Office of State Planning Coordination \(OSPC\)](#). The DDD Grant program awards grants



To learn about the work in each Downtown Development District, view the [GIS Story Map](#).

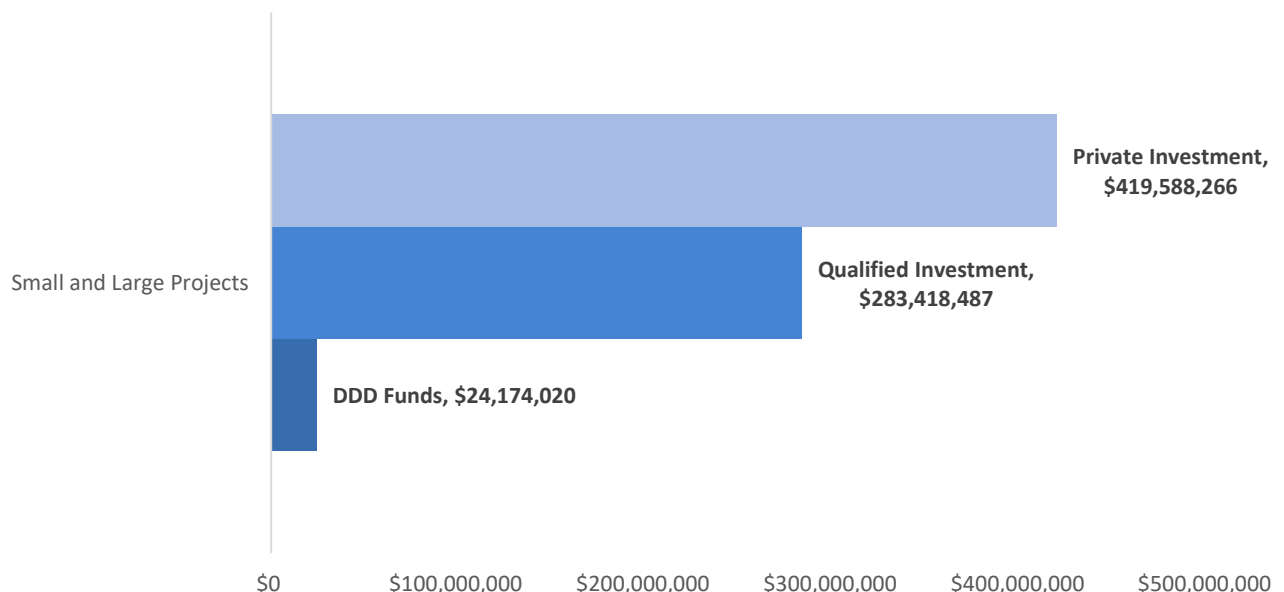
Downtown Development District Rebate Program

The rebate program has been extremely successful. Although the program has only been active since early 2015, there have already been 76 projects completed and placed in service. These 76 projects have used \$7.8 million in

state DDD funds to leverage \$114.8 million in private investment. The largest percentage of projects have been for commercial use (39%), followed by residential projects (36%) and mixed-use projects (25%). A majority of these projects (82%) have been for rehabilitating existing buildings, with the remaining 18 percent of projects being new construction. The total pool of active projects completed and reserved will represent \$24.1 million in state funds leveraging \$419.5 million in private investment. In addition, local governments have provided these investors with a variety of incentives such as tax abatements, permit fee waivers, impact fee waivers and reductions, business license fee waivers, and other financial incentives. These local governments have also provided expedited processing and direct assistance that has a value that cannot be calculated in monetary terms.

In FY18, \$7.7 million in state funds were reserved for 19 large projects and are expected to leverage \$112 million in private investment. In addition, 31 small projects were completed and received \$701,649 in rebate funds. Altogether, over \$8.4 million in DDD rebate funds will leverage \$116 million in private investment. The FY18 projects include creating a range of housing opportunities, new businesses, and jobs through new construction, renovating vacant buildings, and supporting historic preservation. For additional information about the projects funded please visit the DDD Story Map online. Please see [Appendix F](#) for more detailed information about DDD rebate funds and projects.

Private Investment Leverage for All Downtown Development Projects



Work Plan for Downtown Development Districts

- ☐ Monitor the districts for compliance with the provisions of the DDD Act.
- ☐ Process any requested amendments to District boundaries or incentive packages. Any proposed amendments must be reviewed by the CCSPI.
- ☐ Meet more regularly with DDD District Administrators to share best practices among and between districts. A follow up workshop will be held in October 2018, and the annual workshop will be held in spring/summer 2019.
- ☐ Provide technical support as requested to assist districts in implementing their DDD plans.
- ☐ Coordinate with DSHA, CCSPI, the Division of Small Business, the Office of the Governor, and others to manage and implement the program.
- ☐ Conduct outreach and share information about the DDD program as requested, including speaking at events such as conferences, town meetings, and economic development events.
- ☐ Maintain and update the DDD website, which includes the consolidated incentives website. This website was updated in 2018 as a part of the OSPC's overall website redesign.
- ☐ Prepare the "Application for Designation as a District" and lead the review and evaluation process should the Governor choose to open the designation process in FY19.

Neighborhood Building Blocks Fund

The Neighborhood Building Blocks Fund began with \$1 million allocated from a settlement agreement with JPMorgan Chase & Co. designed to remedy harm caused by the 2008–2009 financial crisis. The fund is administered by the Neighborhood Building Blocks Board, consisting of representatives from the Delaware Division of Small Business, Department of Justice (DDOJ), State Housing Authority (DSHA), and the Office of State Planning Coordination (OSPC). The board invites neighborhood revitalization programs, neighborhood associations, community groups, law enforcement, local governments, and other stakeholders working for community development to apply for funding from the Neighborhood Building Blocks Fund.

The Neighborhood Building Blocks Fund is intended to support crime reduction, neighborhood revitalization, and economic development programs statewide, including programs in and around DDDs and communities that are part of DDOJ's Building Blocks Initiative. Building and maintaining strong neighborhoods requires thoughtful and coordinated efforts of state and local governments, neighborhood associations, nonprofit and community organizations, and other stakeholders to enhance economic development, reduce crime, and otherwise improve the quality of life of residents in our communities.

On December 8, 2014, applications were released for the first round of funding. After review and discussion of applications, the board approved over \$685,000 to community groups and just over \$300,000 to local jurisdictions for comprehensive planning. The Neighborhood Building Blocks Fund was replenished with \$3.7 million of bank settlement funds, and in December 2016, the Delaware Economic Development Office released another round of funding. Approximately 57 applications were received for this round of funding with a total request of over \$4 million. The board reviewed the applications and approved grants totaling approximately \$2.4 million, which leveraged over \$3.3 million in matching funds from the applicants. Of the funds approved, over \$245,000 was approved for community planning with the balance of the funds to be expended on a variety of community programs geared toward neighborhood revitalization and safety.

This reporting period covers the third year of this program. In December 2017 approximately 82 applications were received for the 2018 round with a total request of over \$2.2 million. As of August 1, 2018, the board has reviewed 55 of the applications and approved grants totaling \$880,000. These funds leveraged over \$7.1 million in matching funds from those applicants.

Work Plan for Neighborhood Building Blocks Fund

- ☐ Support this effort by having the OSPC director serve on the board.
- ☐ Collaborate with the DOJ, DSHA, and Division of Small Business on programs that support community revitalization.
- ☐ Review applications as assigned and monitor progress of applicants as they implement the grants, complete deliverables, and request reimbursement.
- ☐ Promote this fund for use by towns in planning activities to reduce crime and revitalize neighborhoods should there be another round of grant applications announced by the Board.

Opportunity Zones

In April, Governor Carney announced 25 communities and economically distressed properties across Delaware that were designated as Opportunity Zones by the U.S. Department of the Treasury. These Opportunity Zone designations will help build on ongoing community development efforts across Delaware and encourage additional private investment in economically distressed communities where it can have the most impact. The Delaware sites include a mix of residential, commercial, and industrial properties that are well-positioned to compete for the significant investment needed in low-income communities across the state. Qualified investors in the zones will become eligible for federal tax incentives.

Work Plan for Opportunity Zones

- ☐ Continue to assist the Office of the Governor as needed in developing outreach materials, website content, and map applications.
- ☐ Coordinate with local municipalities to share program details and contribute to successful implementation.

Planning Healthy Communities

There is a growing understanding that the health of the population is influenced, in large part, by the surrounding environment. Many common health problems, such as heart disease, diabetes, stroke, hypertension, and some cancers can be linked to obesity. Often, obesity is a result of a poor diet and limited physical activity. The built environment (where we live, work, and play) can be a major contributing factor to obesity and the related health issues that are associated. Since World War II, the predominant style of land development has been designed around the automobile. This suburban style of development requires driving a car to get most places and often does not result in communities where there is an opportunity to walk or bike to take care of daily needs. Parks and recreational opportunities are often distant from homes as well.



A healthy community design incorporates a mixture of land uses, transportation options, parks, medical services, and recreational opportunities. Unfortunately, there are far more suburban developments than there are “healthy communities” nationwide and in Delaware. In Delaware, most of our older towns and cities were developed prior to World War II, and as such have the design characteristics of healthy communities. However, most of the developed areas outside of municipalities are designed in the suburban style. Considering that in 2010 only 28.4 percent of Delaware’s population lived in a municipality, it can be easy to infer that most Delawareans could live in environments where it is difficult to live a healthy lifestyle. Delaware has the 17th highest adult obesity rate in the country, at 30.7 percent. This is up from 17.1 percent in the year 2000. Among high school students, the obesity rate is the 9th highest in the country at 14.2 percent. In health surveys, 25 percent of Delawareans indicate that they did not engage in any physical activity or exercise in the previous 30 days.

In order to improve Delawareans health outcomes and improve their quality of life, it is important to “move upstream” and start addressing the quality of the environment in which we all live. To start, state agencies, local governments, and communities can change the design of communities and transportation systems. The OSPC has been working on this challenge for many years, starting in 2009 with the formation of the Delaware Coalition for Healthy Eating and Active Living (DE HEAL). Since that time, the OSPC has collaborated with many state agencies and other partners on ways to make Delaware a healthy place to live, work, and play. Here is a summary of some of the current efforts.

Plan4Health and Planners4Health

DE HEAL, the Delaware Chapter of the American Planning Association, and the Delaware Public Health Association formed a partnership to apply for a grant from the American Planning Association and the Centers for Disease Control and Prevention, which was awarded in October 2015. The grant has enabled planners and public health professionals to collaborate on ways to provide input into the comprehensive planning process, with a focus on health and equity. The project focused on Kent County and the City of Dover, both of which have plan updates due in 2018–2019. Analysis and mapping of health data in the county allowed the planning team and consultants to focus on two representative areas that contained health disparities. Planning workshops (called charrettes) were held in each area, leading to recommendations for improving health in these neighborhoods, as well as ideas that will be provided to Kent County and Dover for consideration as they update their comprehensive plans. Some additional grant funding enabled the partners to hold the Planners4Health Roundtable in May 2017. That event brought a broad range of

partners together to develop a strategy to implement healthy community planning throughout the state.

The information created by the Plan4Health initiative is being utilized by both Kent County and the City of Dover as they update their plans. The Kent County comprehensive plan is nearly complete and is scheduled to be adopted in the fall of 2018. The County added Plan4Health design guidelines into the community design chapter as a model for how mixed-use residential subdivisions should be designed. The City of Dover plan is in the early stages of being drafted. The City intends to utilize the chapter by chapter guidance offered by Plan4Health to integrate health into all aspects of the comprehensive plan.

Plan4Health GIS Data

A part of the Plan4Health and Planner4Health grants was to develop a series of maps to identify health equity issues. The methodology for these maps was developed in the first phase and focused on Kent County. The Planners4Health grant allowed the group to refine the methodology and apply it statewide. The result is a series of five zip code level maps of the state demonstrating disparities in health equity indicators, food access, walkability, bikeability, and access to parks and open space. The OSPC has received the GIS data and will be adding these maps to FirstMap to provide a statewide resource for those interested in these topics.

Council on Farm and Food Policy

After a year-long community planning process led by the Delaware Department of Agriculture (DDA), the newly formed Delaware Council on Farm and Food Policy will facilitate access to resources that will allow all Delawareans to circumvent challenges associated with securing nutritious and local food options, minimizing deficiency within communities, and achieving healthy lifestyles. The Council will advise Delaware's Secretary of Agriculture on policy, project development, resource priorities, and implementation strategies to achieve its goal. The formation of the Council was one recommendation in the 2016 University of Delaware report titled "Connecting Healthy Farms to Healthy Delawareans: A Farm and Food Report." The importance of such a Council was further highlighted by the findings of the Plan4Health project and report, which identified a need for healthy food access in neighborhoods throughout the areas in Kent County that were studied. The OSPC is represented by Principal Planner David Edgell, who was selected by Secretary of Agriculture Michael Scuse to be the inaugural Chair of the Council.

Delaware State Health Care Innovation Plan, Healthy Neighborhoods

The State of Delaware has received a grant from the federal government to develop and implement the State Health Care Innovation Plan. The goal for the plan is to achieve sustainable health care transformation resulting in better health outcomes, improved health care quality, and an enhanced provider experience. Delaware aspires to be one of the five healthiest states in the nation. A component of this plan is a series of “Healthy Neighborhoods.” Healthy neighborhoods focus on creating sustainable interventions by convening local stakeholders to improve health in their communities. Through Plan4Health, the synergy of this activity was clear: Often local communities realize that the quality of the built environment in their neighborhoods contributes to a resident’s ability to live a healthy lifestyle.

There are currently local committees active in Wilmington/Claymont, western Sussex County, and central Kent County. The OSPC is actively working with Delaware Health and Social Services (DHSS) and their consultants, particularly on the Kent committee. Through these local committees grant funds have been distributed for pilot projects focused on physical activity and behavioral health. The grant period will close in early 2019. The University of Delaware is leading the creation of a “sustainability model” to continue the Healthy Communities work after the original grant concludes. The hope is to leverage the momentum created by the local committees and the pilot projects to enable continued change in neighborhoods and communities statewide.

Health in All Policies (HiAP) Collaborative

The Delaware Division of Public Health (DPH) convened this group of diverse stakeholders, which included a representative from the OSPC. Other agencies represented on the collaborative include DNREC and DOE, along with representatives from UD, Delaware State University and Nemours. HiAP (or what the federal Department of Health and Human Services calls Public Health 3.0) recognizes that public health problems result not from a single causative agent, but rather from a number of interdependent determinants that are often embedded in complex public policy issues. Disciplines and sectors traditionally outside the domain of public health, such as transportation, education, industrial development, and agriculture, are generally unaccountable to health outcomes and have many competing priorities. To address the broader determinants of health that contribute to poor health and vast health disparities, public health is exploring ways to incorporate concern for and accountability to health outcomes into a wide range of decision making and public policies. The Division sponsored four training sessions where participants learned to integrate health into a variety of policy decisions, including policies

related to the built environment. In FY18, the Division of Public Health received technical assistance from the National Association of County and City Health Officials (NACCHO) on maintaining the HiAP Collaborative. The proposals in their report will guide DPH in furthering the work of the collaborative.

Rapid Health Impact Assessment (HIA) in Dover

In FY18, Delaware's Health in All Policies' Collaborative was invited to participate in a rapid Health Impact Assessment (HIA) for a Former Chesapeake Supply Brownfield Revitalization project at 238 Railroad Ave, Dover, DE 19904. The HIA was made possible through the collaboration of US EPA Region III staff, contractors, and various state agencies, organizations, and advocacy groups. The five health determinants included in the HIA scope were employment; food access; crime; household and community economics; and brownfield redevelopment and urban revitalization. Once the potential impacts were identified, the extent of the effects was evaluated based on six criteria: (1) likelihood, (2) direction, (3) magnitude, (4) permanence, (4) distribution, and (6) strength of evidence. Although brief, the results of this assessment suggested that the redevelopment project may be effective at meeting market needs and providing food to community members. Once the project is more fully formed, there could be opportunities to further assess the potential impacts of the site and develop more detailed recommendations for how to maximize positive health and minimize any potential negative health impacts that result from this brownfield redevelopment project.

Livability Collaborative

A group of planners and policy staff from the OSPC, DelDOT, and the Division of Public Health began meeting regularly last year to discuss our collective efforts working on collecting public health data, developing new maps, improving the built environment, and coordinating transportation planning. This inter-agency effort is being led by DelDOT Planning and is intended to identify areas where collaboration can occur to encourage healthy communities statewide.

This year the collaborative has focused on the opening of the Jack A. Markell Trail. This 7-mile trail connects the downtown of New Castle with the City of Wilmington's River Walk. The trail goes through and is accessible by many suburban communities as well as the State DHSS Herman Holloway campus. It was recognized that this new trail connection would be a perfect opportunity to study travel behavior and the impact of increased physical activity on public health. The collaborative focused on three initiatives to do this.

First, a survey was developed for state employees at the Herman Holloway campus. The survey asks about physical activity levels and informs them of the new trail and the enhanced opportunities for physical activity that it offers. The

survey will be repeated in the future to gauge change in behavior and evaluate the potential health benefits that any increased physical activity may have.

Second, it was recognized by the collaborative that there was no comprehensive promotion effort for the new trail. The trail is actually a combination of at least four trail segments built at different times. The Heritage trail is a small segment in downtown New Castle. The Industrial Tract trail connects the Heritage Trail almost to the Christina River. The newest portion includes a bike and pedestrian bridge and boardwalk over the Christina River connecting to the Wilmington Riverwalk. The collaborative engaged a consultant to develop a trail map and communications guide that will unify messaging about the trail and be used by all entities to promote the trail.

The third strategy is longer term. As a part of the ongoing origin and destination surveying project, DelDOT and UD CADSR will be oversampling the zip codes traversed by the trail. Traffic counters in the area and trail counters on the new trail will measure vehicle, bike, and pedestrian trips. With this additional data, changes can be measured in travel behavior since the trail opened. This research will inform other trail planning projects, as well as transportation modeling efforts.

Work Plan for Planning Healthy Communities

- ☐ Continue to serve on these committees and promote collaboration and data sharing.
- ☐ Upload the statewide health mapping GIS data, developed through the Plan4Health grants, to FirstMap to make these resources available to the public and other agencies.
- ☐ Promote sections focused on healthy communities in local government comprehensive plans and continue to conduct other public outreach efforts to raise the awareness of the link between planning and public health.
- ☐ Evaluate our comprehensive plan checklist and guidance document and add more information about healthy community planning.
- ☐ Collaborate with the Division of Public Health to provide health related comments through the PLUS process using the checklist developed by DE HEAL in consultation with the OSPC.



Map of the Jack A. Markell Trail developed by the Livability Collaborative

Key State Investments

Recognizing the importance of coordinating local land use decisions with state expenditures in services and infrastructure, the OSPC reviews fiscal data provided by Office of Management and Budget (OMB) analysts related to key state investments.

Work Plan for Key State Investments

- ☐ Collect fiscal data annually, with next data collection period to begin in July 2019 (after close of FY19 State fiscal year).
- ☐ Work with OMB budget analysts and leadership to analyze trends to inform policy decisions.
- ☐ Discuss integration of these data into OMB's statewide dashboard project. Alter type and format of data reporting if needed to inform this larger effort.

Development Trends Analysis

The OSPC has been collecting building-permit and development-approval data from all 60 local jurisdictions since the start of 2008. The purpose of this reporting is to inform state, county, and municipal efforts to promote development activity that is around existing infrastructure and in compliance with comprehensive plans and the *Strategies for State Policies and Spending*.

Work Plan for Development Trends

- ☐ Collect data annually from local governments, with next collection period beginning in January 2019, for 2018 calendar year data.
- ☐ Maintain GIS shapefiles for analysis and share the data statewide via FirstMap.
- ☐ Continue our relationship with the Institute for Public Administration (IPA) at the University of Delaware for data analysis and mapping.
- ☐ Work closely with local governments to ensure data are correct and accurate.

Strategies for State Policies and Spending

State code requires that the *Strategies for State Policies and Spending* report be updated every five years. As the comprehensive plan for the state, the *Strategies for State Policies and Spending* document reflects public policies at a particular time and requires continual review, revision, and refinement over time. Comprehensive plans are documents that set forth goals, policies, and guidelines intended to direct the present and future physical, social, and economic development that occurs within each planning jurisdiction.

The current version of the *Strategies for State Policies and Spending* was developed in 2015 and implemented by Executive Order 59 on April 14, 2016.

The OSPC will begin the next update cycle in 2019 with the goal of having the updated document and maps prepared in 2020. In 2019, the OSPC will begin data collection, mapping efforts, and preparation for the public outreach phase of the update.

Work Plan for Strategies for State Policies and Spending

- ☐ Work with state agencies and local governments to collect relevant data layers. Prepare draft maps.
- ☐ Develop new GIS tools to allow for more analysis of data layers that go into the *State Strategies* maps.
- ☐ Plan the public outreach process to engage the public, local governments, and other stakeholders in the update process. Consider adding social media strategies to the outreach process.

Census State Data Center

The OSPC serves as the Governor's liaison between the State of Delaware and the U.S. Census Bureau. This representative ensures state compliance with the Federal Memorandum of Agreement establishing a joint project between the U.S. Census Bureau and the State of Delaware. The representative disseminates Census Bureau communications to the State Data Center network and affiliates and represents the State at Census Bureau meetings and functions. In addition, this staffer responds to public inquiries regarding the Census.

Work Plan for Census State Data Center

- ☐ Work with the Office of the Governor on the Complete Count Committee.
- ☐ Maintain the affiliate network by disseminating Census information.
- ☐ Attend the State Data Center Annual Conference.
- ☐ Hold several training workshops in Delaware for Census Data.
- ☐ Assist in the preparation for the 2020 Census to ensure current and accurate data and counts for our state.
- ☐ Create and maintain a State Data Center webpage on the OSPC website.

Delaware Population Consortium

The population projections produced by the DPC are indispensable to many planning and forecasting processes throughout the state. However, the DPC has never been formalized or adopted by the state as the authority for population, housing, and employment projections. This year, the OSPC assisted in drafting legislation to formalize and codify the DPC. It is hoped that the bill will be acted upon in the next legislative session.

Work Plan for the Delaware Population Consortium

- ☐ Support passage of legislation requiring all state agencies to use the DPC projections in their planning and forecasting.
- ☐ Develop the funding plan and mechanism for the DPC to ensure long-term continuity in population forecasting.

Geospatial Coordination

A staff member of the OSPC serves as the chair for the Delaware Geographic Data Committee (DGDC). The DGDC is a cooperative effort among the government, academic sector, and private sector to build a Delaware GIS Community and improve the coordination of the use of GIS tools and spatial data in Delaware. The DGDC is established in Delaware state law at Delaware Code Title 29, Chapter 91, Subchapter IV to ensure the availability of geospatial data, promote the use and sharing of those data and of GIS software and tools, establish data standards, and support a community of geospatial data providers and geospatial data users in Delaware.

Delaware is one of only a few states without a geospatial coordinator. Utilizing GIS volunteers from a variety of state, local, and academic units, subcommittees have been established to accomplish several tasks.

One of our biggest accomplishments continues to be the State's centralized geospatial data system, called FirstMap. FirstMap launched in September 2014 and is now the repository for over 150 datasets including 9 vintages of aerial imagery dating back to 1937, several state-maintained basemaps, and a statewide geocoding service. The data and services are accessible to all state, county, and local agencies as well as the public. The system provides the single, authoritative data source for all state agencies and the public thus saving time and resources for the storage and retrieval of data for a variety of uses.

Data available in FirstMap are updated on a regular basis (agency and data specific) to ensure the most current data are always being used for mapping and applications throughout the state. In addition, FirstMap has an online cloud-based mapping component (an Esri-hosted ArcGIS Online organization) that enables agencies to quickly create maps and applications to share with their constituents. Several agencies have produced online map-enabled resources to serve their constituents over this past year. Other applications, which require customized enhancements, will continue to be available to the agencies with capability to develop them.

Accomplishments

Since last year's annual report, the geospatial community has had several accomplishments worth highlighting.

- > Statewide 2017 Aerial Imagery has been completed and is now being served publicly through Delaware FirstMap.
- > FirstMap continues to supply updates to the Esri Community Maps program. This allows Delaware to share our most recent municipal boundaries, communities, public protected lands, and imagery data within Esri's national mapping data catalog. This will ensure accurate state data being served to the world.
- > Additional datasets continue to be added to FirstMap as web (map and feature) services and also for download (where appropriate).
- > The FirstMap team continues to reach out to the Delaware Open Data Council (established through Executive Order 57) to coordinate the integration of spatial data into the state's Open Data portal.
- > Many new apps and maps have been launched through FirstMap for agencies to engage their constituents. Examples include the Play Outside, Delaware Flood Planning Tool, Deer Damage Reporting, Spotted Lanternfly Reporting, Coastal Cleanup, and Child Care Search applications.
- > In November 2017, the tenth annual GIS Day field trip hosted nearly 300 fifth-grade students in Delaware. The annual event exposes students, through hands-on activities, to geospatial technology. In addition to the field trip, the GIS Community visited three schools in Delaware to provide a mini-GIS Day experience. These visits exposed an additional 500 students to Geospatial technologies.
- > The Geo-Education Committee was awarded another \$5,000 grant to host workshops to train K–12 teachers in Delaware how to use ArcGIS Online in their classrooms. Esri, the software company that developed ArcGIS Online, offers all schools free access to their online software for use in their classrooms. The OSPC, DDOE, and Delaware Technical Community College (Delaware Tech) worked in conjunction with several GIS professionals to provide the workshops and content. In addition, future online classes are being discussed to reach additional teachers in Delaware.

Work Plan for Geospatial Coordination

- ☐ Lead a subcommittee to address the GEAR initiative to improve data integration and mapping throughout the state. This subcommittee will contract UD IPA to gather information regarding the management and use of geospatial data and FirstMap; to analyze return on investment; and provide recommendations for implementing better integration and mapping coordination.
- ☐ Continue to work with the Department of Technology and Information (DTI) on the upgrade of the enterprise geospatial solution to FirstMap 2.0. The upgrade includes new server infrastructure that will support the capabilities

and new products available with the latest version of the core ArcGIS software.

- ☐ Seek direction from the DGDC Technical Advisory Committee (TAC) on the growth and operation of FirstMap, the statewide GIS infrastructure.
- ☐ Identify a dedicated funding stream for data of statewide importance to improve government efficiency and reduce duplication of efforts. A dedicated funding stream and coordination of data development will reduce the time spent negotiating contracts and searching for funding. The DGDC remains committed to coordination and fiscal responsibility regarding data.
- ☐ Collaborate with the DGDC to work with our federal partners to seek opportunities to leverage our local data at a national level to improve the quality of their datasets. The OSPC and the DGDC will also continue to seek partnerships to reduce the funding obligation at the state level where available.
- ☐ Support the efforts of the geo-education community to develop a high school pathway for GIS and geospatial technologies. Delaware Tech and UD are coordinating this effort and hope to offer the pathway to high schools in the near future. They will also develop training for teachers and are discussing a dual enrollment option for high school students wishing to further pursue geospatial technologies.



Nicole Minni guides a GIS lesson plan for elementary school students in Smyrna.

State Land Inventory

Several state agencies purchase land and maintain disparate inventories of their land. It is a goal of the State to be able to coordinate the information regarding all state-owned land and structures as well as land leased for state office space. To have this information readily and easily accessible would provide the state with details on expenditures and assets.

Over the past several years the OSPC has been working toward collecting and centralizing this data by collaboration with the state agencies that purchase and/or lease land and/or structures. The data are being verified through deed searches, lease reviews, and other means as needed. The dataset being produced is an ever-changing product. As such, the goal of this project is to define a process, develop a centralized database, and maintain the data in a single location so that all information regarding state-owned land is available quickly and easily to all the decision makers (governor, budget, facilities management, etc.).

Accomplishments

- The OSPC has continued to work with DNREC, DelDOT, Division of Accounting, and the Department of Facilities Management to continually update the State Land Inventory.
- The OSPC continues to verify through deed research and other means all properties added and maintained by the various agencies.
- The Department of Facilities Management and the OSPC were awarded a Strategic Opportunity Funds for Adaptation (SOFA) grant to support adaptation and mitigation by providing an operations dashboard and relational database for state agencies to use to study needs and perform risk analysis of state facilities that are vulnerable to flooding and storm risk associated with sea level rise. Work on this grant will begin in the fall of 2018.

The OSPC has been tasked through the GEAR process to improve the current State Land Inventory process by establishing a centralized database with all agency real property data.

Work Plan for State Land Inventory

- ☐ Coordinate with all agencies who purchase, own, or lease real properties to define their processes and develop a path forward.
- ☐ Coordinate and lead a Business Case through DTI to develop and design a centralized database to house all agency data without changing agency workflow.
- ☐ Maintain a single authoritative dataset available to all state agencies for more efficient management and informed decision making; such as, examining

temporal relationships to identify potential environmental threats (i.e., sea level rise) or optimizing future land use.

University of Delaware Collaboration

The OSPC continues to have a strategic partnership with the University of Delaware's Institute for Public Administration (IPA). IPA worked on some key projects this year:

- > **Data Integration and Mapping Project:** The OSPC and IPA completed the first phase of a project to integrate all of the OSPC records related to local government comprehensive plans. Local government comprehensive plans go through several procedures before they are adopted by the local governments and certified by the Governor. Most local governments send the plan through pre-PLUS before they begin the planning process, then the draft plan is reviewed through PLUS, a report is generated by the OSPC for the Governor's consideration, and ultimately the plans are adopted and certified. On occasion the local governments can propose amendments to their comprehensive plans, which are reviewed through PLUS as well. The OSPC's records are stored in paper files and in several databases. This project involved developing a "comprehensive plan database" that is accessed via a website interface. All documents related to comprehensive plans and plan amendments are accessible through this website. The website was recently made available to the public on the OSPC's new website. The OSPC and UD are in discussions about the scope for a future phase of this project that would include more information to this web resource. A future phase will also involve moving the website and database from UD servers to the State of Delaware's servers.
- > **OSPC/IPA Retreat:** The staff of the OSPC and IPA held a retreat on June 11, at the Paradee Center in Dover. Each organization presented current initiatives and activities with one another, shared common goals, and discussed strategic partnerships to improve the coordination of planning in Delaware.
- > **Development Trends:** IPA continues to assist the OSPC to refine the system for analyzing and tracking the development trends data using GIS. See Appendix A for a complete reporting of this year's data.
- > **On-Call and Annual Report:** IPA assisted the OSPC and many local governments through our longstanding "on-call" relationship. There are many data research, analysis, and GIS mapping needs that arise throughout the year. IPA supplements the OSPC staff in some of these cases, utilizing both professional staff and graduate students. IPA also assists the OSPC to prepare reports and publications, such as this one.

Work Plan for University of Delaware Partnership

- ☐ Maintain an “on-call” contract with IPA to assist with data analysis, GIS mapping, planning research, and report development needs that arise throughout the year.
- ☐ Develop a scope of work to expand the “Comprehensive Plan Database” to include more information and documents about local government comprehensive plans.
- ☐ Implement an information technology (IT) plan to move the database and website from UD to state servers.
- ☐ Follow up from June 11 retreat to develop strategic initiatives related to data driven planning, comprehensive plan implementation, and other topics as discussed.

Local Planning Activities and Collaboration

The Governor certifies comprehensive plans once they are confirmed to be consistent with Delaware Code and state land use policies as articulated in the *Strategies for State Policies and Spending*. This year, the Governor certified five comprehensive plans for the Towns of Laurel, South Bethany, and Fenwick Island, and the Cities of Milford and Lewes. In addition, the OSPC worked with 13 towns on pre-update reviews of their plan, 1 town with a 5-year comprehensive plan review, 10 towns ready for comprehensive plan update reviews, and 10 towns regarding amendments to their comprehensive plans. Below are the details of the activities over the past year.

- > **Bellefonte**: Reviewed through PLUS 2017-10-10 for a 10-year update. The town has received state comments and we are awaiting their response.
- > **Bowers Beach**: Pre-update review through PLUS 2018-08-01.
- > **Bridgeville**: Reviewed through PLUS 2018-04-11 for a 10-year update. The town has received state comments and we are awaiting their response.
- > **Camden**: Pre-update review through PLUS 2017-11-13.
- > **Cheswold**: Pre-update review through PLUS 2018-05-09.
- > **Clayton**: Reviewed the comprehensive plan 10-year update through PLUS 2018-07-01. The town has received the state comments and are working to make changes to the plan before beginning the certification process.
- > **Delaware City**: Pre-update review through PLUS 2018-03-07.
- > **Dewey Beach**: Reviewed the 10-year update through PLUS 2018-03-10. The town received comments in April and received their approval

letter in July. Once the plan is adopted, the town will submit for certification.

- > **Dover:** Pre-update review through PLUS 2018-03-01.
- > **Felton:** Pre-update review through PLUS 2017-12-05.
- > **Harrington:** PLUS 2018-01-08 was an amendment of the annexation area and the future land use map in anticipation of the annexation of several parcels and 2018-08-02 was a pre-update review of their plan.
- > **Houston:** Pre-update review through PLUS 2017-08-01 and then reviewed the final update of the plan through PLUS 2018-04-02.
- > **Kent County:** Comprehensive plan review through PLUS 2018-03-02. The county has received our comments and is working to make the required changes before adoption of the plan.
- > **Kenton:** Reviewed an amendment through PLUS 2018-04-01 to amend their annexation map in anticipation of a future annexation.
- > **Lewes:** Reviewed three amendments through PLUS; 2017-11-01, 2017-12-01, and 2018-07-09 were all for changes to the future land use map for proposed rezoning.
- > **Magnolia:** Pre-update review through PLUS 2017-10-07.
- > **Middletown:** PLUS 2017-09-05 was an amendment of the future land use map for two parcels in anticipation of a proposed rezoning.
- > **Millsboro:** Pre-update review through PLUS 2018-06-08.
- > **Millville:** Pre-update review through PLUS 2017-12-04.
- > **Milton:** Reviewed the comprehensive plan update through PLUS 2018-01-04. The town has received comments and we are awaiting a response.
- > **New Castle (City of):** Reviewed a comprehensive plan amendment through PLUS 2018-08-03 to change the proposed future land use on two parcels.
- > **New Castle County:** Reviewed three amendments to their Unified Development Code (UDC) including a text amendment (PLUS 2017-11-11) related to traditional neighborhood designs, a text amendment (PLUS 2017-12-06) related to micro alcohol, and a text amendment (PLUS 2018-04-04) related to the design standards and development design.
- > **Newark:** Reviewed two comprehensive plan amendments, PLUS 2018-02-05 and 2018-03-06 to amend the proposed future land use as noted on the PLUS application.
- > **Newport:** Reviewed a comprehensive plan amendment through PLUS 2017-11-07 to change the proposed future land use of one parcel.
- > **Odessa:** Worked with Odessa on the 5-year review of their comprehensive plan. The town determined no changes were needed.

- > **Rehoboth:** Pre-update review through PLUS 2018-05-17.
- > **Seaford:** Pre-update review through PLUS 2018-02-01.
- > **Slaughter Beach:** Reviewed the update to the comprehensive plan through PLUS 2017-08-08. The town has received comments and we are waiting on a response.
- > **Smyrna:** Reviewed an amendment to the comprehensive plan through PLUS 2018-05-08 to amend the proposed future land use designation of one parcel.
- > **Sussex County:** Reviewed the 10-year update of the comprehensive plan through PLUS 2018-08-01. The county will receive our comments in September.
- > **Woodside:** Reviewed the comprehensive plan update through PLUS 2018-06-01. The town has received the state comments and we are awaiting a response.

Work Plan for Local Planning Activities and Collaboration

- ☐ Assist local governments with technical planning assistance and the review process for comprehensive plans. Currently 22 towns and all 3 counties are in some stage of the planning process.

Preliminary Land Use Service

The Preliminary Land Use Service (PLUS) process is a monthly review process that brings state and local land use officials together with developers to review development proposals in the earliest stages of the development to note possible issues and make suggestions before a developer has made substantial investment in a project. The process is also used to review comprehensive plans for updates and amendments. Since last year's report, the state has reviewed 78 PLUS applications. These applications included comprehensive plan reviews, updates, and amendments, and rezoning requests, site plans, and subdivision plans.

The OSPC is also undertaking a review of how we gather and receive information from our partner agencies. In some cases, the overall process can be demanding in terms of time requirements and breadth of subject-matter expertise necessary to provide competent comment letters. As such, the OSPC is working to develop and evaluate standardized forms that our partner agencies can use (either as a stand alone or in conjunction with project specific comments) to provide information and connect PLUS applicants with agency resources.

Work Plan for Preliminary Land Use Service

- ☐ Manage the PLUS Process by processing applications on a monthly basis, mapping and distributing those applications to state agencies, conducting monthly PLUS meetings, preparing and distributing comment letters for all applications, and receiving response letters from applicants.
- ☐ Coordinate with agency partners to streamline the review process and enhance the effectiveness of the program.

School Site Selection

The OSPC works closely with DDOE, OMB, and the local school districts to identify viable sites for new school construction. The process involves GIS analysis, a review of the *Strategies for State Policies and Spending*, utility availability, local government comprehensive plans, school district needs, transportation, and other factors. All potential school sites are reviewed through the PLUS process, and the Secretary of Education, directors of OMB, and the OSPC must approve the site. Last year OSPC, DDOE, and OMB worked with the Indian River School District on a school site for the Ennis School, to be located across the street from the existing Sussex Central High School. The OSPC, DOE, and OMB are currently working with the Appoquinimink School District on a number of school sites for new schools and school additions in the district.

Work Plan for School Site Selection

- ☐ Lead the school site selection and review process to ensure that all new school sites are consistent with the *Strategies for State Policies and Spending*.
- ☐ Assist school districts with site selection using professional planning assistance and GIS mapping, if requested by the district.
- ☐ Review all proposed school sites through the PLUS process.
- ☐ Work with municipalities to encourage them to reserve land for school sites in their comprehensive plans and to have supportive zoning regulations for school construction.
- ☐ Look for opportunities to reserve school sites within development projects, where applicable.

Annexation Plan of Services Review

Municipal annexations are governed by Delaware Code Chapter 22, Title 1, §101. Among other requirements, all annexations must be consistent with the most recently adopted municipal comprehensive plan, be depicted as future annexation areas within that plan, and must be rezoned by ordinance to classifications consistent with the adopted comprehensive plan or development strategy.

Cities and towns are also required to prepare a Municipal Annexation Plan of Services for all annexations. The plan demonstrates how services are to be provided and the operating and financial capabilities necessary to support them. The plan of services collects property and land use data, information about needed utility and public safety services, and helps municipalities examine the impact of development in annexation areas.

Over the past year the OSPC has reviewed 21 plans of service for 10 towns. These requests, if the annexation is approved, will total 75.5 acres of land annexed into municipalities over the past year.

Work Plan for Annexation Plan of Services Review

- ☐ Work with municipalities regarding plan of service applications, plan amendments to meet code regarding potential annexations, and municipal boundary changes in response to approved annexations.

Metropolitan Planning Organization Coordination

Metropolitan planning organizations (MPOs) are federally designated agencies responsible for coordinating transportation planning and programming in Delaware's urbanized areas (areas with population of 50,000 or more persons). Plans and programs developed and adopted by the MPOs outline how federal transportation funds will be spent and must comply with federal regulations. MPOs also sponsor, fund, and undertake transportation planning studies that can and do support local government comprehensive planning and redevelopment activities.

In Delaware, there are three MPOs. WILMAPCO covers New Castle County as well as Cecil County, Maryland. The Dover/Kent County MPO covers all of Kent County, including all portions of Smyrna and Milford. The Salisbury/Wicomico MPO covers portions of western Sussex County along US 13 from the City of Seaford south to the Town of Delmar as well as the greater Salisbury area and Wicomico County, Maryland. The OSPC's director and planners are active members of each MPO's working committees and help to promote coordination and collaboration between the MPO, DelDOT, and local governments through integrating land use and transportation planning.

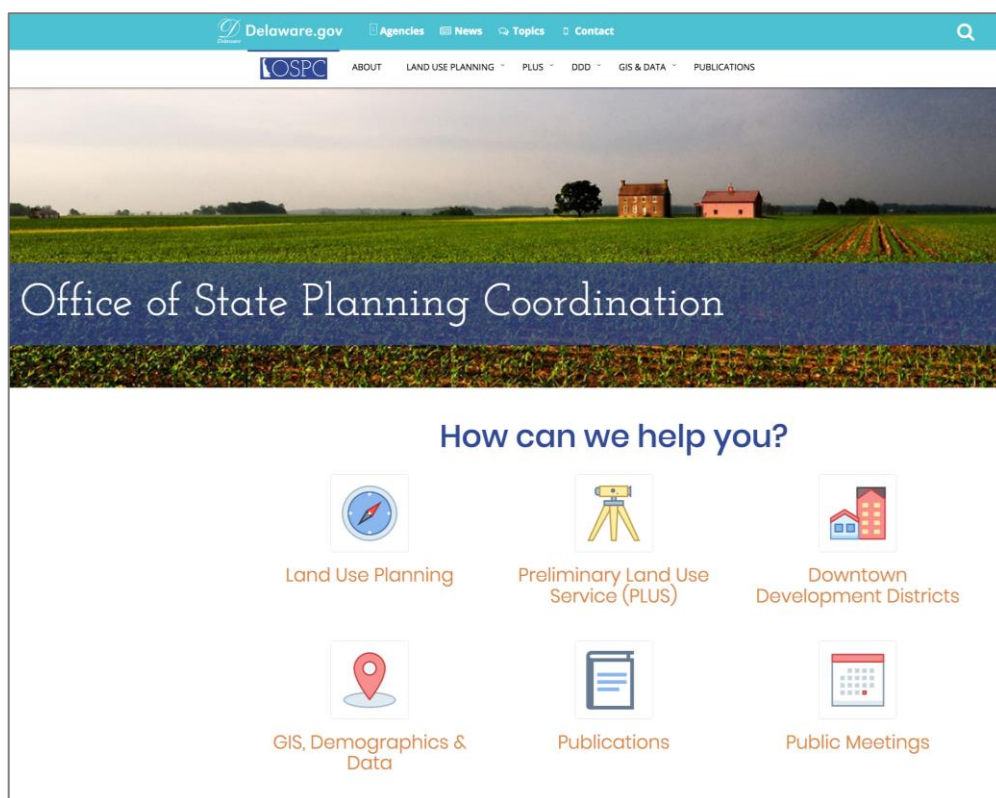
All MPOs must adopt a Metropolitan Transportation Plan (MTP) and update it periodically. Each MTP contains a list of transportation projects that must be consistent with Delaware's Capital Transportation Program (CTP). WILMAPCO and the Salisbury/Wicomico MPO will both be updating their MTPs in 2019. The OSPC and DelDOT both have roles in communicating local government priorities to MPO staff.

Work Plan for MPO Coordination

- ☐ Participate as members of the various committees and working groups of all three Delaware MPOs.
- ☐ Advocate for coordination among the MPOs, DelDOT, and the local governments to better incorporate transportation and land use planning through comprehensive plans.
- ☐ Participate in MPO-sponsored planning studies and identify transportation issues in local government comprehensive plans that could form future studies.

The OSPC Website Redesign

The OSPC unveiled a [redesigned website](#) on Friday, August 31, 2018. This redesign improves the way information is delivered to citizens, developers, and municipal stakeholders. A key objective of the redesigned site is to enable users to access our information from any device, be it a standard PC, a mobile phone, or a tablet. The new website includes a GIS-based tool for searching and finding [PLUS](#) project information that significantly improves the user's experience. Also included in the new site is a [Comprehensive Plan Database](#), which provides links to documents related to the adopted and certified comprehensive plans and plan amendments from all local jurisdictions. Please visit the OSPC's new website to learn more about the office and services we offer.



Master Planning Activities

A “master plan” can be defined as a land use plan focused on one or more sites within an area, which identifies access and general improvements. It is intended to guide growth and development over a number of years, or in phases. Master planning is a tool that can benefit Governor Carney’s land use agenda to make government more efficient, promote economic development, and, in general, improve the quality of life for Delaware citizens. The success of master plans depends on the involvement of a wide range of stakeholders, both public and private, working together.

The OSPC is an avid supporter of these planning efforts. Local governments are encouraged to use master plans to implement specific concepts for areas outlined in their broader Comprehensive Land Use Plans. This concentrated planning exercise can help communities create shovel-ready development sites and meet open space preservation objectives. The OSPC role is to aid in coordinating these efforts and serve as a technical resource.

A **Transportation Improvement District** (TID) is tool to implement master plans. A TID is a geographic area defined for the purpose of securing required improvements to transportation facilities in the area. It is a place where land use and transportation are planned in detail in advance, such that development consistent with that planning can pay a readily determined fee and forego the Traffic Impact Study process. A Transportation Improvement District provides the transportation improvements needed to support land development in locations identified as appropriate for development in local comprehensive plans. Coordinating land use and transportation can lower infrastructure costs and foster planning for market-ready development and redevelopment opportunities.

Delaware Department of Transportation is committed to expanding the use of TIDs in Delaware in order to improve land use and transportation coordination with local land use agencies. In the last year, DelDOT has hired a principal planner to conduct outreach on TIDs, facilitate their development, and manage the implementation of TID infrastructure fee programs and monitoring programs. Over \$500,000 has been spent, and another \$500,000 budgeted for FY19, for developing new TIDs. DelDOT is working with Sussex County, City of Milford, and City of Dover, to develop a TID in each jurisdiction. Additional TIDs are also being considered in City of Lewes, Kent County, and City of Newark. The Eastown Master Plan in the Town of Middletown is also being revisited, in order to update and implement the plan through a new TID.

As stated above, TIDs are a tool to implement master plans. The **Southeast Neighborhood Master Plan** adopted by the City of Milford in July 2011 is a perfect example. The Southeast Milford TID will facilitate the implementation of

the transportation improvements identified in the master plan. New developments within the TID area will share in the cost of the road improvements identified by the master plan.

Another goal of the Southeast Neighborhood Master Plan was to preserve agricultural lands in the surrounding area. To achieve this, the city is working with the Delaware Department of Agriculture to develop a transfer of development rights (TDR) program. Developers would be able to purchase development rights from the land owners in order to develop more densely in the receiving areas that are near infrastructure and services.

Similar to master plans, the transportation planning studies completed by the MPOs can also serve to implement comprehensive plans by addressing transportation and land use for certain areas in more detail and with an emphasis on infrastructure. There are three such planning studies ongoing through the Dover/Kent MPO that represent the impact these efforts can have on growth in a community.

At one end of the spectrum is the “[Bank Lane Bicycle Route Feasibility Study](#).” Bank Lane in Dover has been identified as critical missing east-west link in the City’s downtown bike network in the Kent Bike Plan as well as in the Plan4Health initiative. The current corridor is not designed for bicycle traffic, and there is one offset intersection that can be dangerous for cyclists and pedestrians to navigate. The study will analyze the existing conditions, determine the existing bicycle usage and motor vehicle conflicts, examine alternative potential future facilities, and recommend a preferred alternative.

The “[Milford Central Business District Parking Study](#)” will help Milford ensure the continued success of its downtown revitalization efforts and the city’s designated Downtown Development District by addressing a growing concern: availability of parking. The study will analyze parking supply and demand, and will include weekday/weekend and daytime/nighttime comparisons. The study will evaluate potential improvements such as reconfiguring lots, adding on-street parking, reconfiguring traffic patterns, effectively communicating available parking, funding parking improvements, and the possibility of locating and building additional parking structures.

Finally, the Dover/Kent County MPO is working with the Delmarva Central Railroad Company to conduct a study of land use and zoning in Kent County with access to the railroad. The purpose of the study is to create an inventory of properties that (1) may be suitable as future commercial or industrial sites where [Cargo Oriented Development](#) (COD) could occur and (2) would promote and support economic growth that relies on freight rail transportation networks and facilities by maximizing access to freight terminals and nodes. The results of this study will complement and help to implement the economic development

goals and initiatives found in many local government comprehensive plans in Kent County.

Climate Resiliency and Adaptation

Inter-Agency Coordination on Climate Action

Since 2014, 11 state agencies have been working together to prepare their agencies for climate change, build state assets to a higher standard for resiliency, and assist local governments in preparing for climate impacts. Representatives of these agencies coordinate through inter-agency meetings, pilot projects, and implementation of climate adaptation measures supported by Strategic Opportunity Funds for Adaptation (SOFA) grants provided by DNREC. This inter-agency coordination began with Executive Order 41, signed by then-Governor Jack Markell. Several aspects of the executive order are currently and will continue to be implemented by the OSPC. Specifically, the OSPC will implement the requirement that state resources and facilities will be sited with the effects of climate change and sea level rise included in the planning process. This will be an integral part of the OSPC's review of PLUS applications for state projects. Also, the OSPC will serve as a planning resource to local municipalities updating their Comprehensive Plans enabling them to include data on and best management practices for adapting to changes prompted by climate change and sea level rise.

Work Plan for Inter-Agency Coordination on Climate Action

- ☐ Review state projects with climate change and sea level rise as a factor.
- ☐ Assist local municipalities with including climate change and sea level rise in their comprehensive plans.

Resilient and Sustainable Communities League

The Resilient and Sustainable Communities League (RASCL), which began in 2015, is a partnership of state agencies, nonprofit organizations, academia, and local governments formed to coordinate and make sure that resiliency building services offered by league members align with and meet the needs of the local governments. This is a critical concern, since there is a growing urgency for more resilient communities in the face of natural hazards and climate impacts, but also because state resources are limited and they must be used to the maximum effect.

RASCL's mission is to "accelerate the capacity of all local governments to undertake the necessary steps to become sustainable and resilient." The group is comprised of staff from various agencies who meet periodically (about four times per year) to share information and coordinate service delivery. The group

includes representatives from the OSPC, DNREC, Delaware Emergency Management Agency, DelDOT, UD IPA, Delaware Geological Survey, Delaware Sea Grant, Delaware Environmental Monitoring and Analysis Center, Office of the Delaware State Climatologist, Partnership for the Delaware Estuary, Delaware Center for Inland Bays, and the Delaware League of Local Governments.



The first Resilient and Sustainable Communities League Summit

In the past year, the RASCL held its first summit, which is an event intended to promote information sharing and best practices on community resiliency topics with community leaders and practitioners across the state. The theme for the 2017 summit focused on applying lessons learned from the 2017 hurricanes that struck Texas, Florida, and Puerto Rico. Presenters shared information about the latest climate predictions for Delaware, resiliency planning at the state level, communicating risk, and local case studies from communities planning for resiliency and sustainability. Almost 200 people attended, representing more than 20 municipalities, state and federal government, local communities, academia, and private companies. The RASCL Outreach Committee is currently planning the next summit, with a tentative date of December 5, 2018, at the DelTech DelOne Conference Center in Dover.

RASCL members also continued efforts to refine the organization structure and develop an official charter for the group. In addition, the League began planning additional outreach opportunities entitled “Coffee Hour with the RASCL.” During these informal events, community leaders interested in discussing issues regarding resiliency and sustainability can speak directly with RASCL members to learn more about programs and funding that are available for assisting with planning and implementation of adaptation and mitigation projects. The first Coffee Hour was held in April 2018 in Smyrna, the second was held in Newark in June, and the next one is being planned for a location in Sussex County in the early fall of 2018.

Work Plan for the Resilient and Sustainable Communities League

- ☐ Continue membership on the league.
- ☐ Serve on the summit committee and help plan the event.

Sustainable Communities Planning Grant

DNREC's Division of Climate, Coastal, and Energy continued its support of the Sustainable Communities Planning Grant program, established in 2017. The primary goal of the program is to provide funding and technical support for communities to plan for sustainable growth and resilience to the impacts of climate change. Sustainable communities are defined as vibrant, healthy, and prepared communities that balance demands for environmental protection, resiliency, economic growth, and social objectives. Sustainable communities keep their residents safe from unexpected events while also providing economic stability and maintaining a high quality of life. A secondary goal of the program is to increase the capacity of Delaware communities to implement the concepts of sustainable planning. By developing actionable strategies to achieve their sustainability goals and supporting outreach and information sharing with other communities, the work being completed will provide concrete examples of what communities throughout the state can do to prepare for the impacts of climate change.

Five grants, totaling \$245,000, were awarded to benefit local governments through development of Community Sustainability Plans:

- > City of Wilmington: *Resilient Wilmington—Phase I*
- > City of Newark: *Newark Community Sustainability Plan*
- > Town of Frederica: *Frederica Community Sustainability Plan*
- > Town of Milton: *Town of Milton Sustainability Plan*
- > Town of Fenwick Island: *Fenwick Island Sustainable Community Plan*

Each of these communities has made significant progress toward developing sustainability goals through outreach and educating residents, assessing vulnerabilities, and completing other sustainability planning activities. They were encouraged to establish partnerships with nonprofit, community, and quasi-governmental organizations and form multi-disciplinary stakeholder groups. These communities represent a broad range of demographics and geography throughout the state and will serve as strong examples of how sustainable planning can be accomplished in Delaware. Funding for the Sustainable Communities Planning Grant Program comes from the Regional Greenhouse Gas Initiative (RGGI), a multi-state carbon dioxide cap-and-trade program focused on reducing emissions from electric generating units that contribute to global warming.

Work Plan for Sustainable Communities Planning Grant

- ☐ Participate on the grant review committee as in the past.
- ☐ Assist the communities that received the grants as requested, including review of any comprehensive plan amendments or updates that result from these planning studies.

Resilient Community Partnership

The City of New Castle was selected for DNREC's second Resilient Community Partnership (RCP), and the project was completed in March 2018. This partnership, run by the Delaware Coastal Program, leverages federal funding provided by the National Oceanic and Atmospheric Administration (NOAA) to help Delaware communities improve their planning and preparation capabilities for responding to coastal hazards. Through this partnership, DNREC and the city carried out a comprehensive vulnerability assessment of risks from coastal storms, sea level rise, and extreme tides.

As part of the RCP project, a new City Preparedness Task Force was formed to advise on constituent concerns and specific flooding incidents impacting the different neighborhoods within the city limits. This group of stakeholders was integral in developing the vulnerability assessment and adaptation recommendations and also assisted in hosting public workshops that provided informative presentations on flooding and emergency preparedness. The final RCP project report, the *City of New Castle Vulnerability Assessment and Adaption Plan*, is available online at <http://de.gov/resilientcommunity>.

The planning process for the next Resilient Community Partnership has begun. As a joint project between DNREC and the Delaware ocean front municipalities of the City of Lewes, City of Rehoboth, the Town of Henlopen Acres, Dewey Beach, Bethany Beach, South Bethany, and Fenwick Island, the planning process will examine the changing amounts of impervious surface coverage that lead to runoff and flooding and will look to develop methods of reducing it in the future.

Work Plan for Resilient Community Partnership

- ☐ Continue to work with coastal towns regarding this program.
- ☐ Promote resiliency as a goal in comprehensive plans of those towns with risk of flooding and damage from hazardous events.

Delaware Bayshore Initiative

DNREC's Delaware Bayshore Initiative continues to highlight the Delaware Bayshore region and promote the protection, conservation, and restoration of Bayshore habitats, and enhanced public access to outdoor recreation in the

region. The initiative also supports raising awareness about the Bayshore's natural, cultural, and historic resources, and increases community engagement by investing in Bayshore communities and encouraging ecotourism, volunteerism, and stewardship.

The Delaware Bayshore Initiative continues to integrate the branding design for the Delaware Bayshore and Delaware Bayshore Byway in coordination with the DelDOT Byway Program, Delaware Greenways, the Bayshore communities, and conservation partners. Delaware Bayshore communities and conservation partners also continue to actively use the branding design according to guidance provided in the style guide. DelDOT has completed the approval of the Bayshore Byway auto-tour sign design and efforts are underway to develop a sign plan for placement. Sponsors and funding are still needed to make the auto-tour signs happen throughout the entire corridor along with additional wayfinding and trailblazing within the bayshore towns. DelDOT, Delaware Greenways, and DNREC are coordinating together to help make this happen and to help visitors and tourists navigate to points of interest.

The complete Delaware Bayshore Byway from New Castle to Lewes, extended in 2017 to continue along a series of scenic roads from Route 9 near Dover south to the Lewes Historic Byway, encompasses more than 100 miles through the Bayshore region. The map on the next page shows the communities and recreational facilities connected by the Byway. The Byway management committee is in the process of expanding the geographic scope of the Bayshore Byway Corridor Management Plan to incorporate the extension of the Byway south to Lewes.



Near Delaware City, the Delaware Bayshore Initiative is accomplishing goals related to ecotourism with enhancements at the Ashton Tract of the Augustine Wildlife Area on the southern side of Thousand Acre Marsh. These enhancements will provide improved parking, a portable restroom, and trail benches at a site that has become a popular wildlife viewing destination. Additionally, construction is underway for a second wildlife viewing area at the nearby Port Penn Tract that will provide opportunities to view the Lang Impoundment and the Delaware River.

Delaware Bayshore Byway

Publication Date: Tuesday, November 14, 2017

The map displays the Delaware Bayshore Byway as a blue line running along the coast from New Castle in the north to Milton in the south. Red dots indicate Discovery Zones at locations such as Port Penn/Augustine, Odessa, Cedar Swamp/Blackbird Creek, Woodland Beach, Bombay Hook NWR, Leipsic, Little Creek, St. Jones Neck, Magnolia, Bowers Beach, Bennetts Pier, Big Stone Beach, Slaughter Beach, Fowler Beach, Prime Hook NWR, Broadkill Beach, and Milton. Other routes are shown in red, including the Historic Lewes Byway and Cape May Lewes Ferry. The Bayshore Outline is indicated by a yellow shaded area.

Bayshore Initiate Area

- The Delaware Bayshore Byway
- Discovery Zones
- Other Routes
- Historic Lewes Byway
- Cape May Lewes Ferry
- Bayshore Outline

A compass rose and a scale bar (0 to 4 miles) are located in the bottom right corner. Logos for DELAWARE BYWAYS and Regional Systems Planning (DeIDOT) are also present.

At the Aquatic Resources Education Center near Smyrna, the Delaware Bayshore Initiative is investigating opportunities to enhance outdoor education, recreation, and ecotourism and has completed a master plan for enhancements. Enhancements underway include the design of a public canoe and kayak launch to provide access to a small pond. The Bayshore Initiative is also partnering with DelDOT's Transportation Alternatives Program at this site to design a safe network of pedestrian access by improving trails and connections between the site's facilities. These improvements will benefit the youth education programs offered here and will also offer more opportunities for the general public to visit and take self-guided tours along the trails on site.

The Delaware Bayshore Initiative is working with the Town of Leipsic to complete the design for public parking and an accessible entrance to a proposed "Farmers and Watermen Museum" in the town hall. Efforts to support the museum included participation by the Bayshore Initiative at the Town's inaugural Leipsic Oyster Festival to promote the connection between the Bayshore's natural resources and their ecological and economical importance to this working waterfront community.

In Little Creek, a small boat launch on the Little River along Route 9 is under construction. This new facility will provide access for both motorized and non-motorized vessels and improve the local ecotourism economy with the potential for new local business needed to support increased visitation by boaters, kayakers, anglers, and other users. Additionally, planning is underway for a Delaware Bayshore visitor center within the Little Creek Wildlife Area and for wildlife-viewing enhancements at both Little Creek and Ted Harvey wildlife areas. These new facilities will increase visitation to these popular outdoor recreation sites and strengthen the ecotourism economy in the Town of Little Creek. Increased visitation to this area will also increase awareness of the communities of Pickering Beach and Kitts Hummock and the public beach access provided by these small Bayfront residential areas.

The Town of Bowers is partnering with the Delaware Bayshore Initiative to improve climate and sea level adaptation for the paved parking area in the center of the town. Approximately 2.3 acres of the paved area will be converted to community open space and parking for a recently zoned commercial district and public beach access. Additionally, the project will improve drainage and manage runoff while providing outdoor recreation space to benefit the town's residents and visitors. DNREC's SOFA grant is providing funding to support this project in addition to other grant funds.

Slaughter Beach also continues to work with the Delaware Bayshore Initiative to accomplish ecotourism and conservation outreach goals. Slaughter Beach has the distinct honor of being named the third town in the state and eighty-third community in the nation to receive certification as a Community Wildlife

Habitat by the National Wildlife Federation in partnership with the Delaware Nature Society. The community is currently partnering with Delaware Nature Society, DNREC's Bayshore Initiative, DNREC's Land and Water Conservation Trust Fund, DelDOT, and private supporters to improve nature education and outdoor recreation amenities for visiting school groups and the public. Together, this partnership is constructing a boardwalk trail and observation platform in the town for salt marsh education programs.

Broadkill Beach is also working with the Delaware Bayshore Initiative to accomplish ecotourism and conservation outreach goals, including design and installation of interpretive signs to educate residents and visitors about fish, wildlife, and habitat found in and around the community. New information kiosks have been installed near the community's beach access to educate visitors about the Delaware Bayshore, local natural resources, and the Delaware Bayshore Byway.

Work Plan for Delaware Bayshore Initiative

- ☐ Coordinate with DNREC and the Bayshore towns to assist with implementation and any comprehensive plan updates needed to help them achieve resiliency, sustainability, or ecotourism goals.



DelDOT Long-Range Transportation Plan

Delaware's transportation network is continually evolving with changes in land use, demographics, travel patterns, preferences, and technology. All of these changes require DelDOT to develop new and cost-effective solutions to meet the future needs of the transportation network. As a guide toward these solutions, the federally required Long Range Transportation Plan (LRTP) identifies broad goals, policies, and priorities to meet transportation needs over a 20-year period. The goals are multi-modal and address current and future community land use, economic development, environment (natural, human, and cultural), traffic demand, public safety, health, and social needs. The current update of DelDOT's LRTP, *Innovation in Motion*, will provide a framework for the documentation of innovative policies, programs, and operations and will also explore new strategies for addressing our transportation challenges.



INNOVATION IN MOTION

Innovation in Motion will consist of three main parts. Part one will include background information about the state, trends in demographics, transportation, and technology, and a summary of the broader LRTP goals. Part two will consist of content derived from DelDOT's divisions that are specific to various transportation modes and other topics as they relate to the plan's goals stated in part one. The theme of the topic-specific content will focus on the challenges facing DelDOT and the state's transportation system over the next two decades and the plans and innovations that are ongoing and being developed within DelDOT to meet these challenges. Part three will highlight new innovations and evolving technologies across the transportation industry that are changing the ways the public uses and interacts with the transportation system. Among the topics addressed in this section will be connected and

autonomous vehicles and related technology and the increasing role of mobile applications and telecommunication in data access and sharing.

A full draft of Innovation in Motion is nearing completion, and the final plan is expected to be published by the end of 2018. A summary of the plan and progress updates will be available at the MPO Technical Advisory Committee meetings in late summer and at the Capital Transportation Program hearings in each county in September. The LRTP website contains background information about the plan and explanations of the plan's goals, the secretary's video message, announcements of public events related to the development and release of the plan, and will ultimately include the full plan as linked PDF documents.

Work Plan for DelDOT LRTP

- ☐ Participate in DelDOT LRTP effort as requested.
- ☐ Share demographics, development trends, key investments, and other data to inform DelDOT's planning effort.
- ☐ Share LRTP efforts and the final plan with local governments so they can use the information as they develop their comprehensive plans.

This page is intentionally left blank.

APPENDIX A: DEVELOPMENT TRENDS DATA AND ANALYSIS

Introduction	2
Residential Trends	3
Development Applications.....	3
Residential Development Intensity Map, Development Applications	5
Building Permits	7
Residential Development Intensity Map, Building Permits	9
Trends Analysis.....	11
Residential Development Intensity Trends.....	15
Non-Residential Trends	25
Development Applications.....	25
Non-residential Development Intensity Map, Development Applications	27
Building Permits	29
Non-residential Development Intensity Map, Building Permits	31
Non-Residential Trends Analysis	33
Residential Development Intensity Trends.....	37
Concurrence with Growth Policies	46
Residential Development	46
Non-Residential Development.....	47
Trends Summary	48
Overview of Methodology	52

Introduction

To assist in the tracking of development trends in the state, the Office of State Planning Coordination (OSPC) has been collecting building permit and development approval data from 60 local jurisdictions in Delaware since the start of 2008.

Data collected for this effort include development application approvals and building permits. Development application approvals indicate where a developer has gained approval from local jurisdictions to build. Building permits are issued by the local jurisdiction when construction is ready to commence.

There is not a perfect correlation between development applications and building permits, since not all approved developments are eventually built. Furthermore, the time-frame for development can be highly variable in that a building permit is not necessarily issued within a particular period following the application. However, the number and location of both types of permitting activities in Delaware can indicate broader trends in development activity in the short term (in the case of building permits) and in the longer term (in the case of development applications).

Note that these stages of development occur after the initial review of a project (sometimes through the Preliminary Land Use Survey, or PLUS, process), and before the final stage of development in which a certificate of occupancy (CO) is issued by the jurisdiction.

Data for this analysis have been provided to the Institute for Public Administration (IPA) at the University of Delaware by the OSPC. The latest full year of data (2017) represents the tenth year of analysis, during which time the OSPC has provided consistent tabular and GIS-compatible development data and information. The data include the date of the development application or building permit approval, the number of units proposed (for residential applications) or square-footage (for non-residential applications), the county and local jurisdiction, acreage, and physical location, among other attributes.

Policies at the state level help guide local development in appropriate ways. The 2015 *Strategies for State Policies and Spending* (the *State Strategies*) is a document that seeks to achieve this goal by specifying where in the state development is most appropriate and desirable. The *State Strategies* defines four “investment levels” that specify the intensity of development encouraged in each level by state agencies. Investment Level 1 and 2 constitute areas where growth is most encouraged, Level 3 is considered a secondary growth area, and Level 4 defines the areas where intensive growth is not encouraged by the state. By comparing locations where applications for development and building permits have been approved to the *State Strategies* investment levels, it is possible to gauge the effectiveness of the state’s growth policies. The *State Strategies* report is updated approximately every five years; this analysis reflects the Investment Levels defined in the latest version (2015).

Residential Trends

Development Applications

Development application data represent approved preliminary development plans for residential and non-residential building. These project applications include subdivisions and site plans that indicate the planned scope and scale of building and thus provide an indication of potential future development.

Table A.1 presents a summary of residential units in approved development applications for the 6-year period from 2012 through 2017 by county in Delaware. During this time, a total of 17,724 residential units were approved for development by local governments in Delaware.

Table A.1 Residential Units Approved in Development Applications, by County

County	2012	2013	2014	2015	2016	2017	Total
New Castle	3,207	905	1,135	1,000	347	1,808	8,402
Kent	481	728	650	1,550	445	309	4,163
Sussex	355	1,083	842	1,273	868	738	5,159
Total	4,043	2,716	2,627	3,823	1,660	2,855	17,724

Table A.2 shows the number of units for each year by local jurisdiction.

Table A.2 Residential Units Approved in Development Applications, By Local Jurisdiction

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
New Castle County	3,093	488	780	820	127	944	6,252
Middletown	-	-	-	-	30	854	884
New Castle	-	-	120	66	27	-	213
Newark	39	412	117	89	127	7	791
Wilmington	75	5	118	25	36	3	262
New Castle Total	3,207	905	1,135	1,000	347	1,808	8,402
Kent County	36	646	208	-	367	-	1,257
Cheswold	-	-	-	272	-	-	272
Clayton	200	-	-	-	-	-	200
Dover	245	82	41	986	78	7	1,439
Frederica	-	-	-	-	-	299	299
Houston	-	-	-	4	-	-	4
Milford	-	-	401	-	-	3	404
Smyrna	-	-	-	288	-	-	288
Kent Total	481	728	650	1,550	445	309	4,163
Sussex County	355	352	714	48	635	128	2,232
Dewey Beach	-	-	-	-	23	-	23
Lewes	-	-	-	-	-	2	2
Milford	-	-	-	1,194	-	1	1,195
Millville	-	55	128	-	102	551	836
Ocean View	-	300	-	31	108	56	495
Seaford	-	72	-	-	-	-	72
Selbyville	-	304	-	-	-	-	304
Sussex Total	355	1,083	842	1,273	868	738	5,159
State Total	4,043	2,716	2,627	3,823	1,660	2,855	17,724

*Represents development applications in unincorporated areas of the county

Much of the development application activity in 2017 occurred in just a few jurisdictions, Middletown and unincorporated county land in New Castle County, Frederica in Kent County, and Millville in Sussex County.

The OSPC and other state agencies seek to encourage development (both residential and non-residential) to focus in the growth-oriented Investment Levels (Levels 1 and 2 as defined by the *State Strategies* map), and steer development away from Level 3 and particularly Level 4. The location of proposed and actual development is an important indicator of the efficacy of these state-level policies on local development trends. Table A.3 summarizes residential housing units in development applications for the 6-year period from 2012 through 2017, by county, for the entire state, and by *State Strategies* investment level.

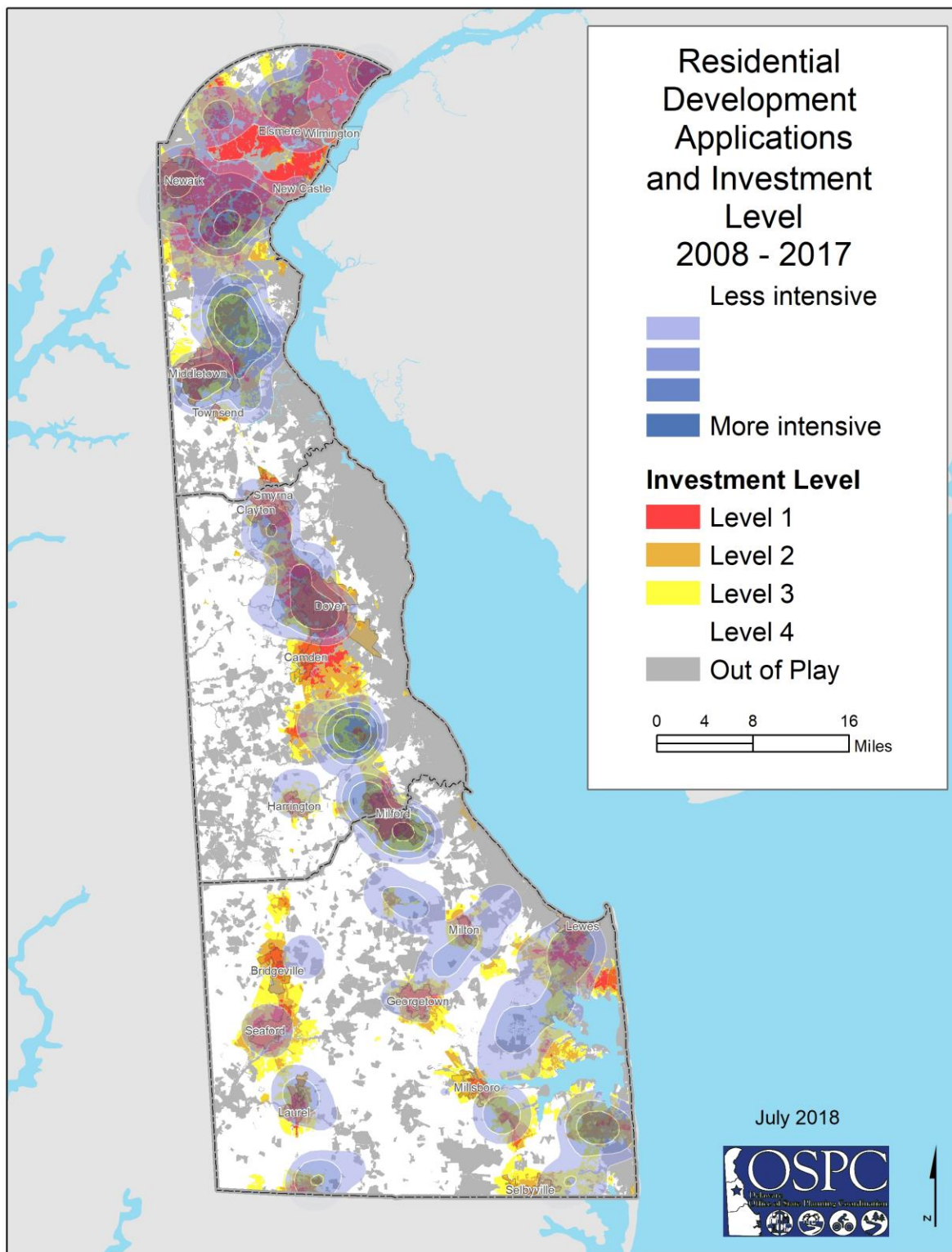
Table A.3 Residential housing units based on development applications, by county and statewide, by *State Strategies* investment level, 2012–2017

	2012	2013	2014	2015	2016	2017	2012–2017
New Castle	Units	Units	Units	Units	Units	Units	Total Units
Level 1 & 2	2,197	853	503	875	328	1,702	6,458
Level 3	565	8	505	117	9	89	1,293
Level 4	445	44	127	8	10	17	651
New Castle Total	3,207	905	1,135	1,000	347	1,808	8,402
Kent							
Level 1 & 2	480	681	442	1,546	445	309	3,903
Level 3	-	-	-	4	-	-	4
Level 4	1	47	208	-	-	-	256
Kent Total	481	728	650	1,550	445	309	4,163
Sussex							
Level 1 & 2	192	354	380	1,238	284	328	2,776
Level 3	139	517	120	18	534	405	1,733
Level 4	24	212	342	17	50	5	650
Sussex Total	355	1,083	842	1,273	868	738	5,159
Delaware							
Level 1 & 2	2,869	1,888	1,325	3,659	1,057	2,339	13,137
Level 3	704	525	625	139	543	494	3,030
Level 4	470	303	677	25	60	22	1,557
State Total	4,043	2,716	2,627	3,823	1,660	2,855	17,724

Residential Development Intensity Map, Development Applications

To assess the intensity of residential development (as measured by number of units within approved development applications), data for the period of record (2008 to 2017) were summarized in a “heat-map.” The map in Figure A.1 shows the intensity of that development (presented in zones depicted in shades of blue), overlaid on the *State Strategies* map of investment levels. A discussion of the degree of agreement between the intensity of development applications and *State Strategies* investment level follows later in this report.

Figure A.1 Development Intensity Levels Based on Residential Development Activity in Development Applications, 2008–2017, Overlaid on the *State Strategies*



Building Permits

Building permit data represent development that has been permitted and is ready to move forward to the construction phase. These permits represent building that is very likely to occur in the near future, and therefore represent a good measure of building activity in the near term.

Table A.4 presents a summary of residential units in building permits for the 6-year period from 2012 through 2017 by county in Delaware. During this time, a total of 31,888 residential units were approved for development by local governments in Delaware.

Table A.4 Residential Units Approved in Building Permit, by County

County	2012	2013	2014	2015	2016	2017	Total
New Castle	787	1,569	1,889	2,136	2,191	1,979	10,551
Kent	778	914	986	903	1,096	1,297	5,974
Sussex	1,881	2,410	2,602	2,775	2,640	3,055	15,363
Total	3,446	4,893	5,477	5,814	5,927	6,331	31,888

Table A.5 shows the number of units for each year by local jurisdiction.

Table A.5 Residential Units Approved in Building Permits, by Local Jurisdiction

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
New Castle County*	629	1,162	1,111	1,170	1,085	1,204	6,361
Arden	-	2	-	-	-	-	2
Ardentown	1	1	1	-	-	-	3
Bellefonte	-	16	-	-	1	-	17
Delaware City	-	1	2	1	4	-	8
Elsmere	-	-	3	2	-	-	5
Middletown	72	113	182	224	247	333	1,171
New Castle	4	-	6	5	9	2	26
Newark	45	21	300	20	259	90	735
Odessa	-	-	-	-	-	1	1
Smyrna	-	-	-	1	-	-	1
Townsend	15	18	26	48	45	43	195
Wilmington	21	235	258	665	541	306	2,026
New Castle Total	787	1,569	1,889	2,136	2,191	1,979	10,551
Kent County*	543	645	664	550	618	618	3,638
Bowers Beach	1	4	2	-	1	-	8
Camden	-	4	3	15	17	25	64
Cheswold	1	-	1	13	56	41	112
Clayton	9	28	26	19	29	44	155
Dover	38	99	143	165	225	383	1,053
Farmington	1	2	2	-	1	-	6
Felton	5	3	4	2	2	2	18
Frederica	16	18	23	17	11	21	106

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
Harrington	1	1	4	8	4	11	29
Hartly	-	1	-	-	-	-	1
Houston	-	-	-	-	4	1	5
Kenton	-	-	2	-	-	1	3
Leipsic	-	-	-	-	-	1	1
Little Creek	-	-	1	-	-	-	1
Milford	88	3	5	11	7	6	120
Smyrna	65	89	106	84	104	119	567
Woodside	-	-	-	-	-	1	1
Wyoming	10	17	-	19	17	23	86
Kent Total	778	914	986	903	1,096	1,297	5,974
Sussex County*	1,463	1,732	1,900	1,945	1,845	2,219	11,104
Bethany Beach	11	28	18	22	13	24	116
Bethel	-	1	-	4	3	4	12
Blades	3	1	-	3	-	1	8
Bridgeville	36	52	48	54	19	46	255
Dagsboro	3	9	9	7	3	10	41
Delmar	8	5	3	4	3	8	31
Dewey Beach	3	3	13	24	8	7	58
Ellendale	-	7	3	9	14	9	42
Fenwick Island	8	9	10	5	3	10	45
Frankford	-	5	4	1	1	2	13
Georgetown	53	11	54	7	32	2	159
Greenwood	1	8	1	-	6	4	20
Henlopen Acres	-	2	2	-	1	2	7
Laurel	1	1	2	1	1	2	8
Lewes	53	66	71	26	39	9	264
Milford	21	22	31	62	48	98	282
Millsboro	51	135	140	178	233	171	908
Millville	88	122	133	178	141	145	807
Milton	17	39	45	54	42	32	229
Ocean View	17	26	46	58	67	107	321
Rehoboth Beach	21	34	28	37	-	34	154
Seaford	9	67	14	50	18	14	172
Selbyville	-	10	15	27	82	81	215
Slaughter Beach	4	-	2	4	4	1	15
South Bethany	10	15	10	15	14	13	77
Sussex Total	1,881	2,410	2,602	2,775	2,640	3,055	15,363
State Total	3,446	4,893	5,477	5,814	5,927	6,331	31,888

*Represents development applications in unincorporated areas of the county

In all three counties across the period of record, the preponderance of building permit activity occurred outside incorporated towns. Not surprisingly incorporated places that have seen the most residential building permit activity are Middletown and Wilmington in New Castle County, Smyrna and Dover in

Kent County, and the Millsboro and Millville area in Sussex County. Sussex County has seen more residential building permits issued than the other counties for each year. For instance, in 2017 Sussex had 50 percent more permits than New Castle County.

Table A.6 summarizes residential housing units based on building permits for the 6-year period from 2012 through 2017, by county, for the entire state, and by *State Strategies* investment level.

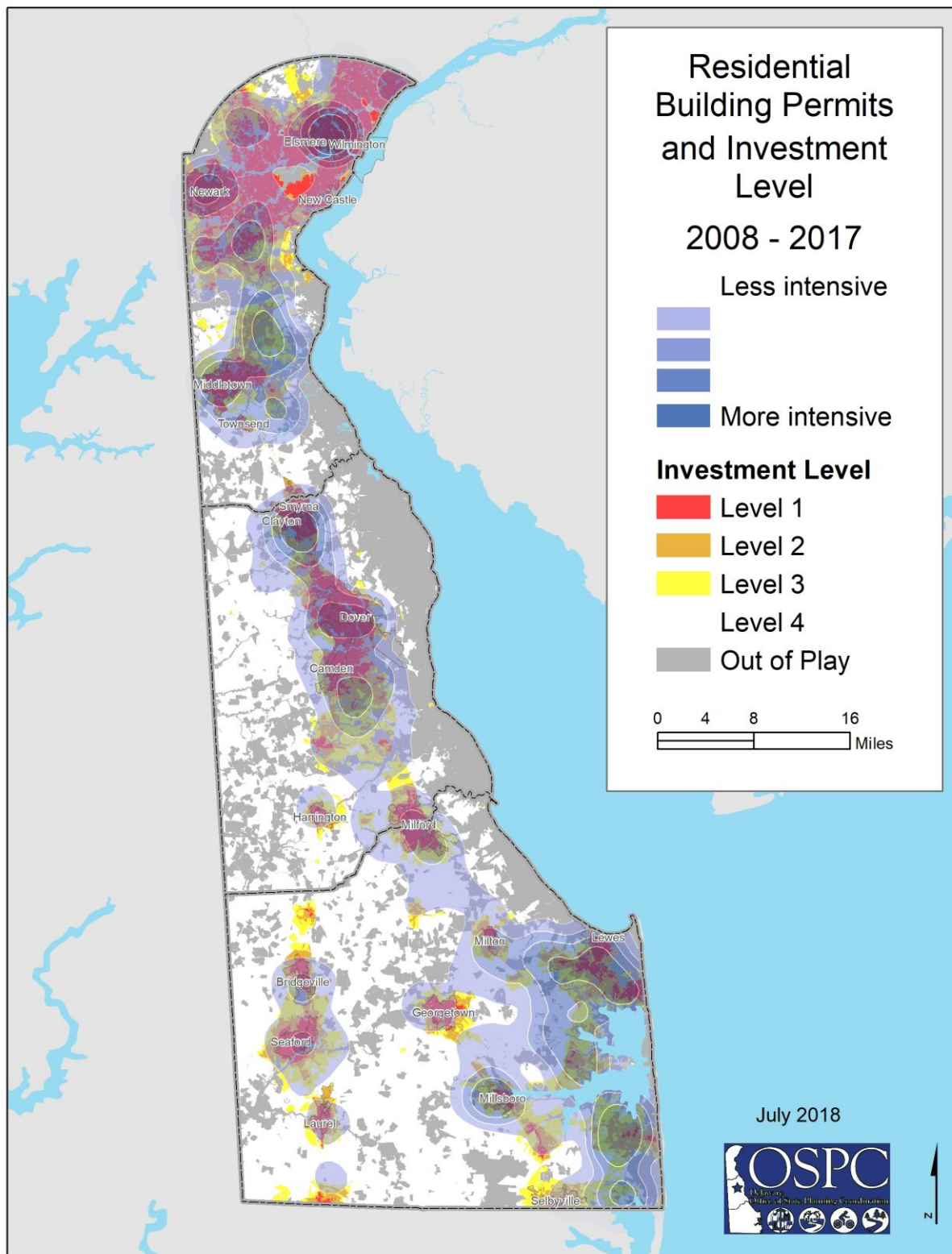
Table A.6 Residential Housing Units Based on Building Permits, by County and Statewide, by *State Strategies* Investment Level, 2012–2017

	2012	2013	2014	2015	2016	2017	2012–2017
New Castle	Units	Units	Units	Units	Units	Units	Total Units
Level 1 & 2	592	1,315	1,472	1,642	1,559	1,497	8,077
Level 3	163	178	345	353	406	371	1,816
Level 4	32	76	72	141	226	111	658
New Castle Total	787	1,569	1,889	2,136	2,191	1,979	10,551
Kent							
Level 1 & 2	550	677	703	642	784	966	4,322
Level 3	88	74	72	77	81	102	494
Level 4	140	163	211	184	231	229	1,158
Kent Total	778	914	986	903	1,096	1,297	5,974
Sussex							
Level 1 & 2	918	1,196	1,392	1,319	1,148	1,247	7,220
Level 3	461	595	511	714	793	969	4,043
Level 4	502	619	699	742	699	839	4,100
Sussex Total	1,881	2,410	2,602	2,775	2,640	3,055	15,363
Delaware							
Level 1 & 2	2,060	3,188	3,567	3,603	3,491	3,710	19,619
Level 3	712	847	928	1,144	1,280	1,442	6,353
Level 4	674	858	982	1,067	1,156	1,179	5,916
State Total	3,446	4,893	5,477	5,814	5,927	6,331	31,888

Residential Development Intensity Map, Building Permits

The “heat map” in Figure A.2 shows the intensity of development as measured by residential building permits (in shades of blue), overlaid on the *State Strategies* map of investment levels. A discussion of the degree of agreement between the intensity of development applications and *State Strategies* investment level follows later in this report.

Figure A.2 Development Intensity Levels Based on Residential Development Activity in Building Permits, 2008–2017, Overlaid on the *State Strategies*

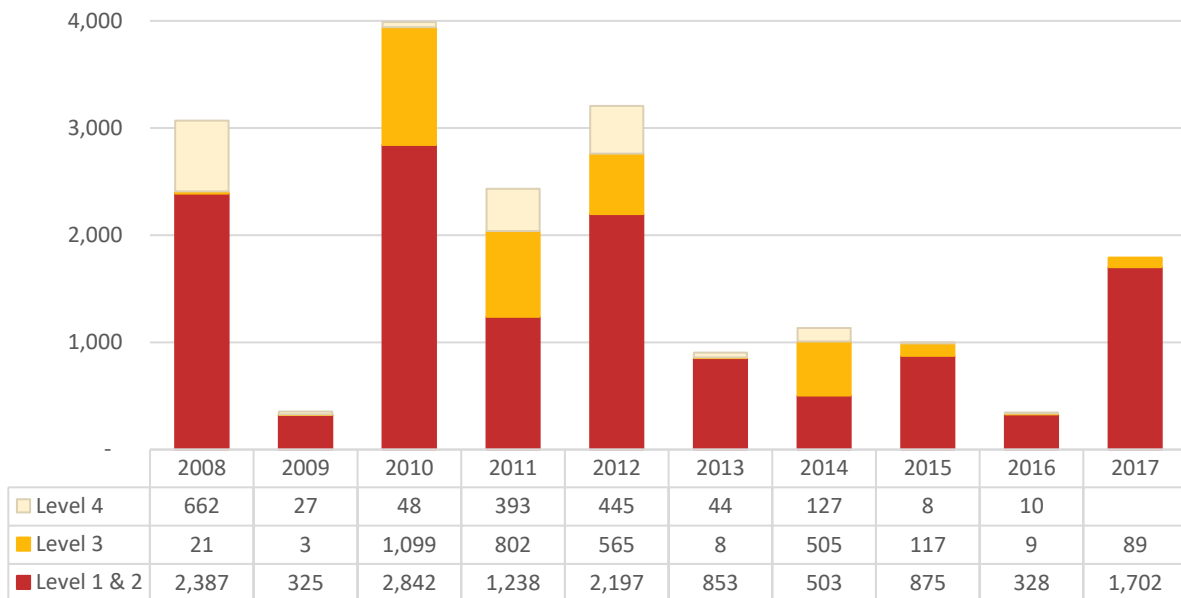


Trends Analysis

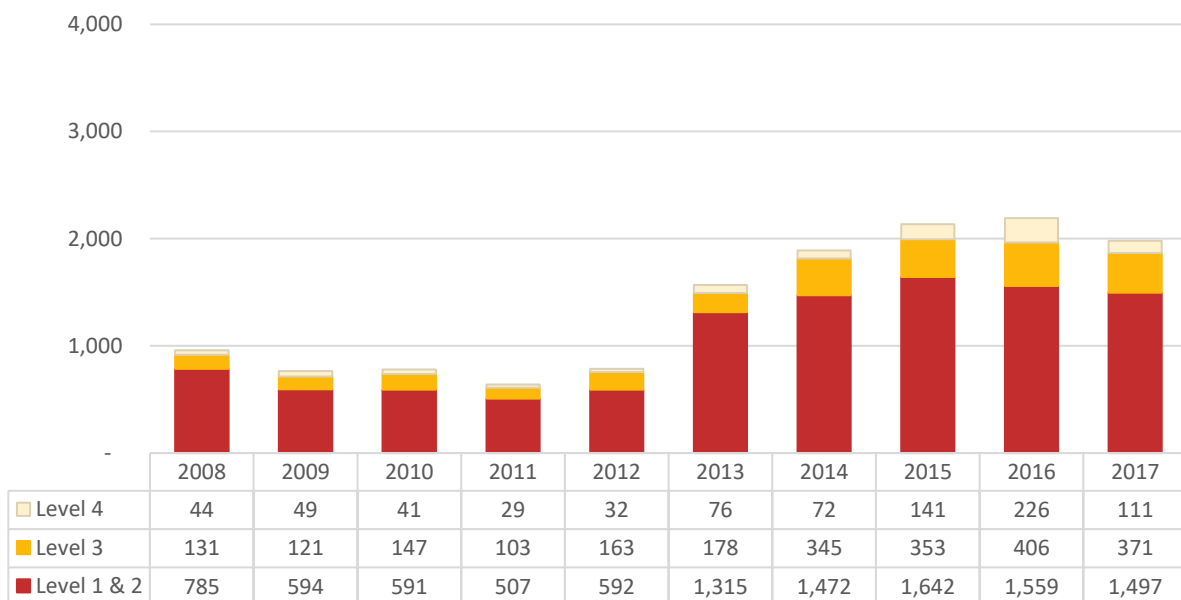
Figure A.3 present the trends in residential housing units based on development applications and building permits, by county and summarized for the entire state, for the entire period of record, from 2008 through 2017. The data presented are also subdivided based on which *State Strategies* investment level they fall within.

Figure A.3 Residential Development Trends by County and Statewide, 2008–2017

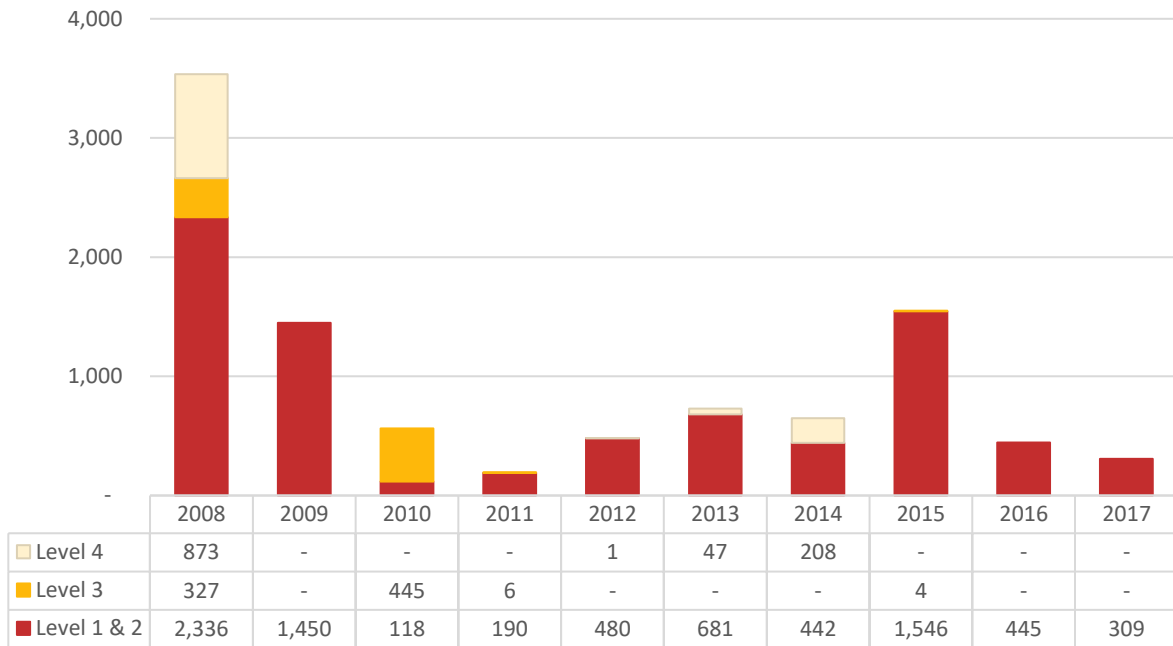
Development Applications, New Castle County



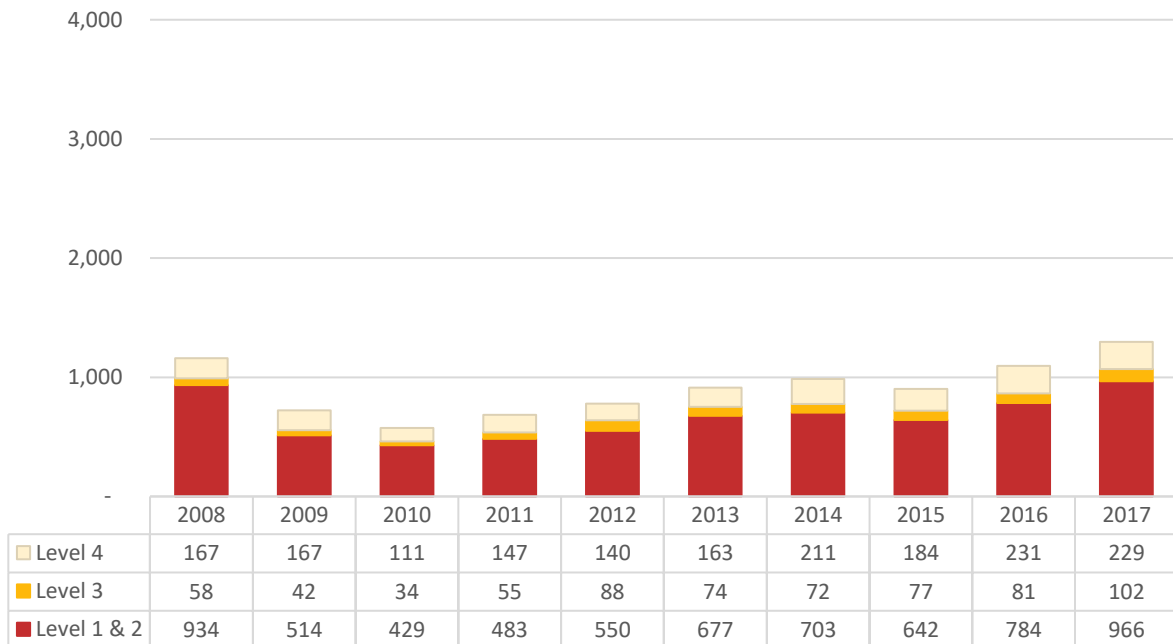
Building Permits, New Castle County



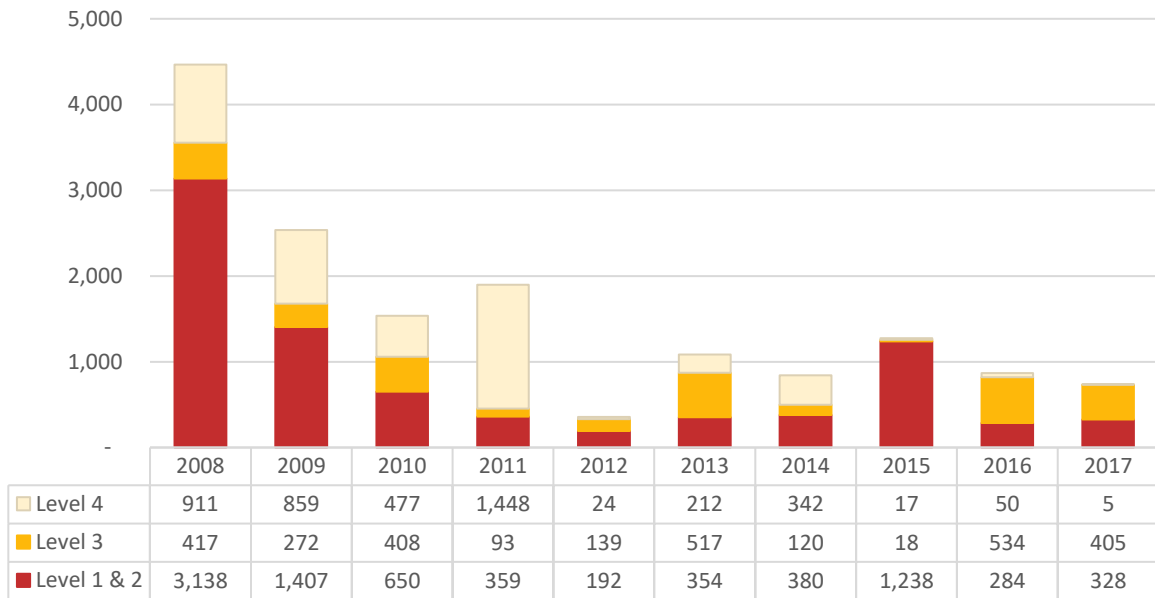
Development Applications, Kent County



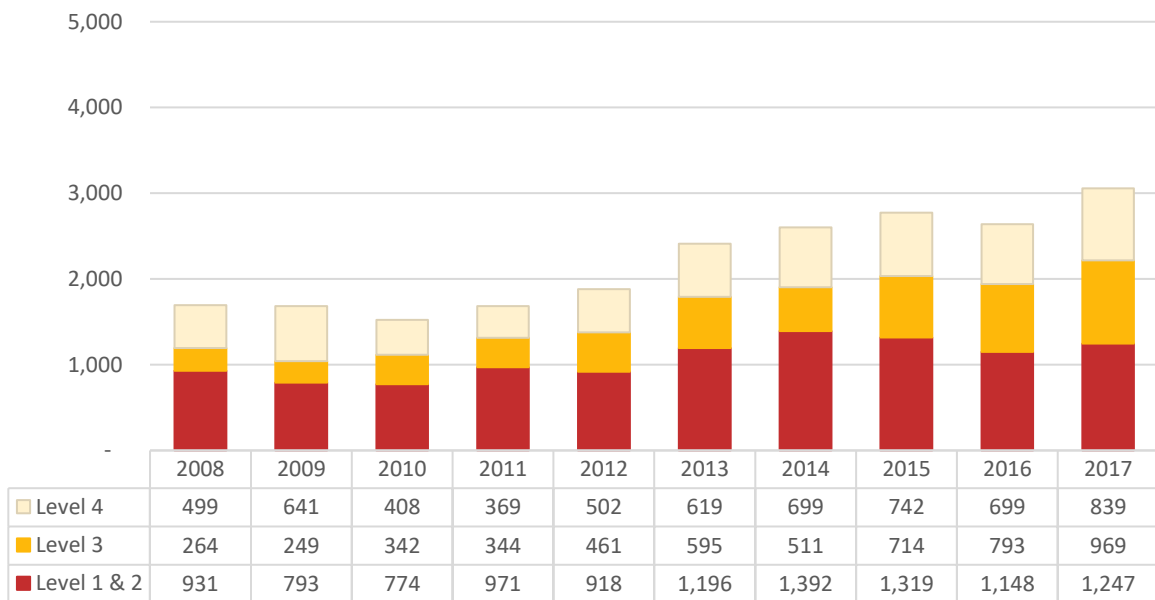
Building Permits, Kent County



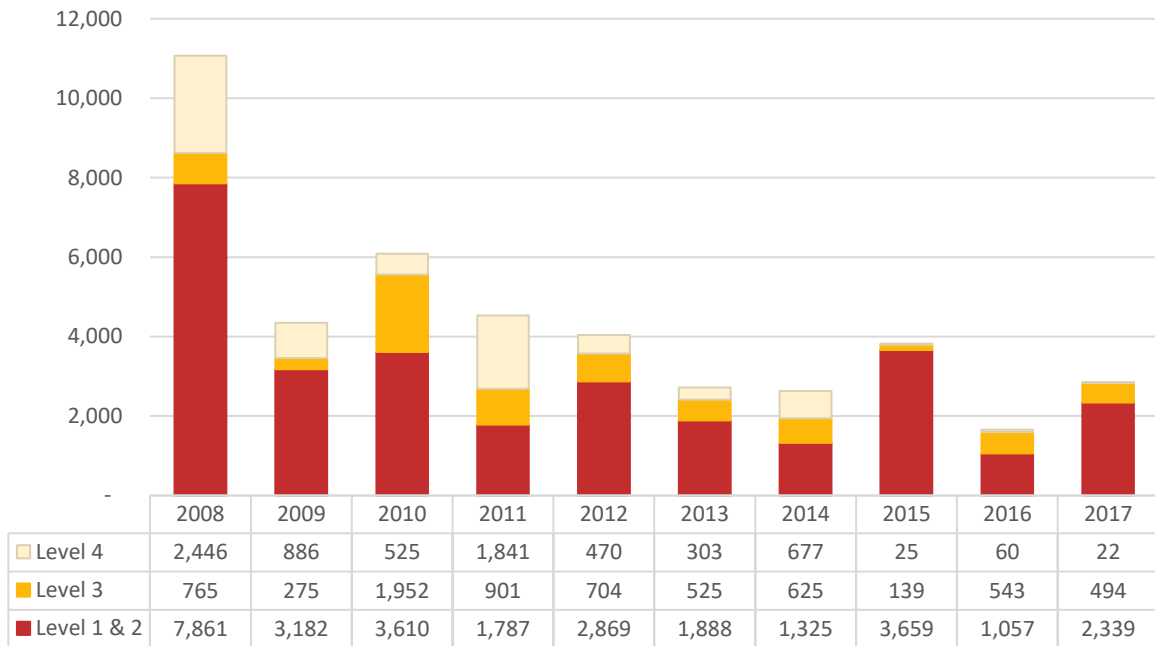
Development Applications, Sussex County



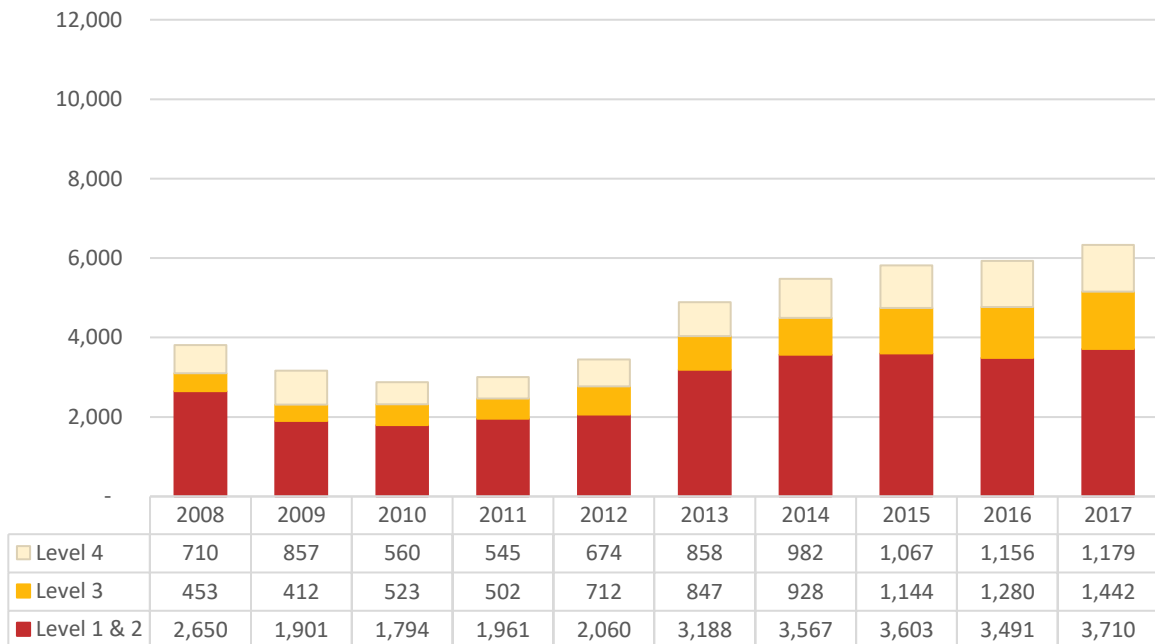
Building Permits, Sussex County



Development Applications, State of Delaware



Building Permits, State of Delaware



In each county and across the state 2008 saw the most residential units in development applications, with a sharp drop off in the subsequent several years. There was a slight upturn in the number in 2015, with fewer units in the subsequent two years. The exception to this continued declining trend is in New Castle County, where there was a strong increase in number of residential units in 2017.

While the number of residential units represented by development applications across the period saw fairly significant downward trends in each county (following the building boom of the mid-2000s), the decade following the economic downturn in the housing market beginning in 2008 saw gradual but steady recovery in all three counties based on building permits. This is likely due to the fact that development that had been “on the books” during the building boom of the early 2000s, but had been on hold since the downturn, has been gradually being implemented.

Based on building permits, Sussex County saw the largest amount of residential development activity in 2017, a trend that has persisted through the period of record.

Continued lower levels of residential units based on development applications in recent years could signal a leveling off of residential units that arrive at the building permit phase in the next several years.

Residential Development Intensity Trends

In addition to mapping the intensity of development across the 10-year period of record (2008 to 2017), a series of 4-year intensity maps were produced to assess and characterize shorter-term periods. The intensity of residential development (based on development applications and building permits) was mapped for the four periods of 2008 to 2011, 2010 to 2013, 2012 to 2015, and 2014 to 2017, providing four “snapshots” of discrete development periods across the 10-year period of record. See Table A.7 for a depiction of the 4-year overlapping time periods.

Table A.7 Four-year (Quadrennial) Time Periods for Development Intensity Maps

2008	2009	2010	2011	2012	2013	2014	2015	2016	2017

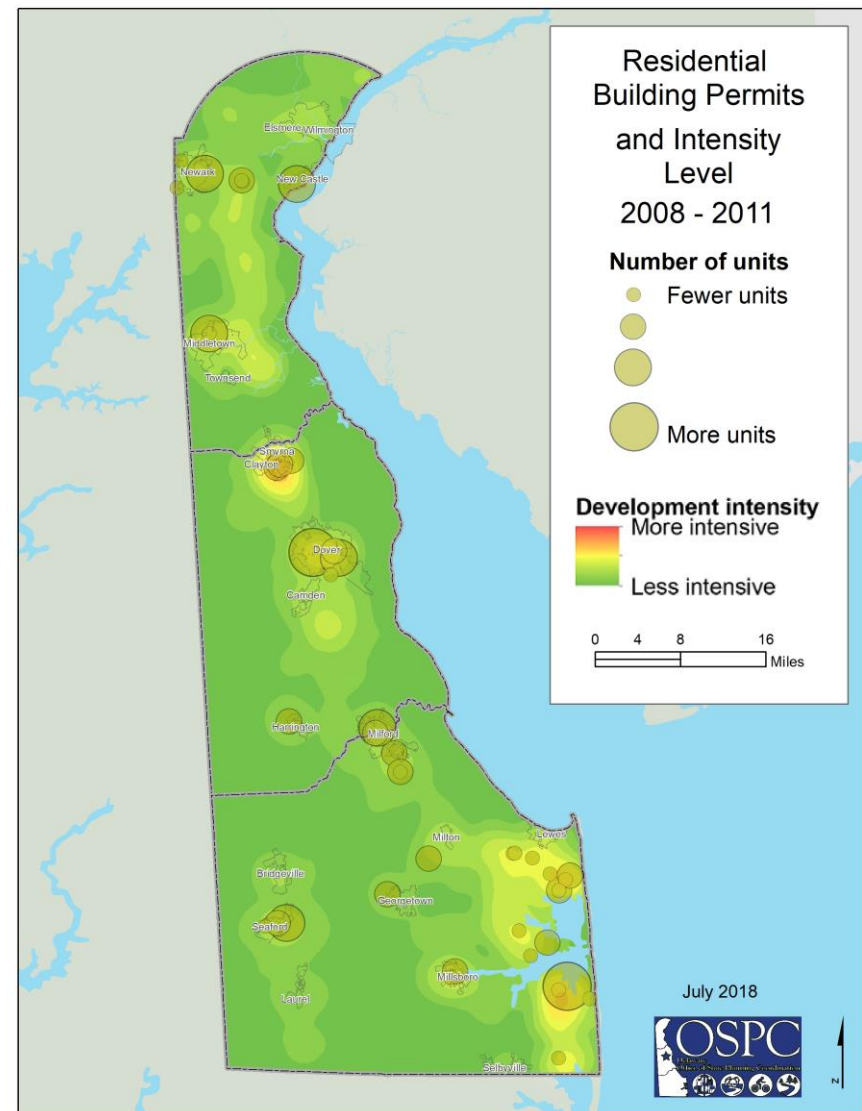
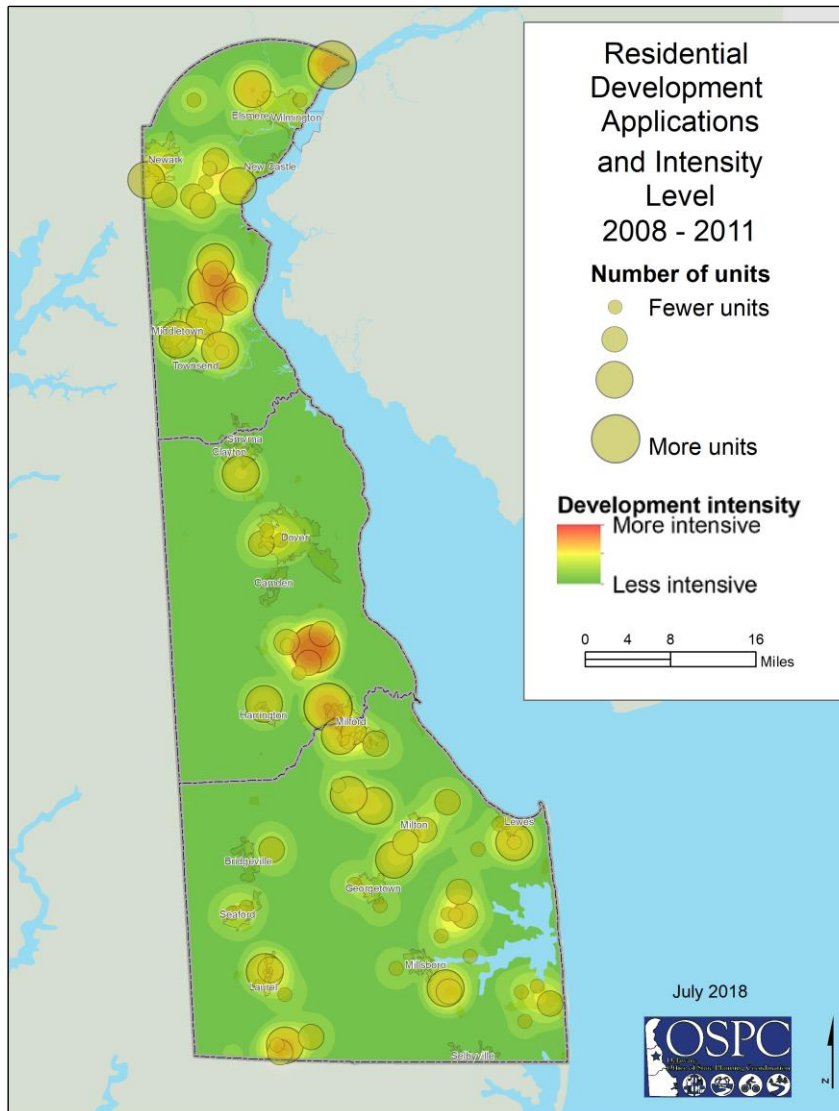
Figure A.4 depicts development intensity (or “heat”) maps for each 4-year period, including dots indicating the location and amount (in number of residential units) of development applications and building permits. Note that the dots do not depict every unit, but show only applications and permits above a threshold: 65 units for development applications and 10 units for building permits.

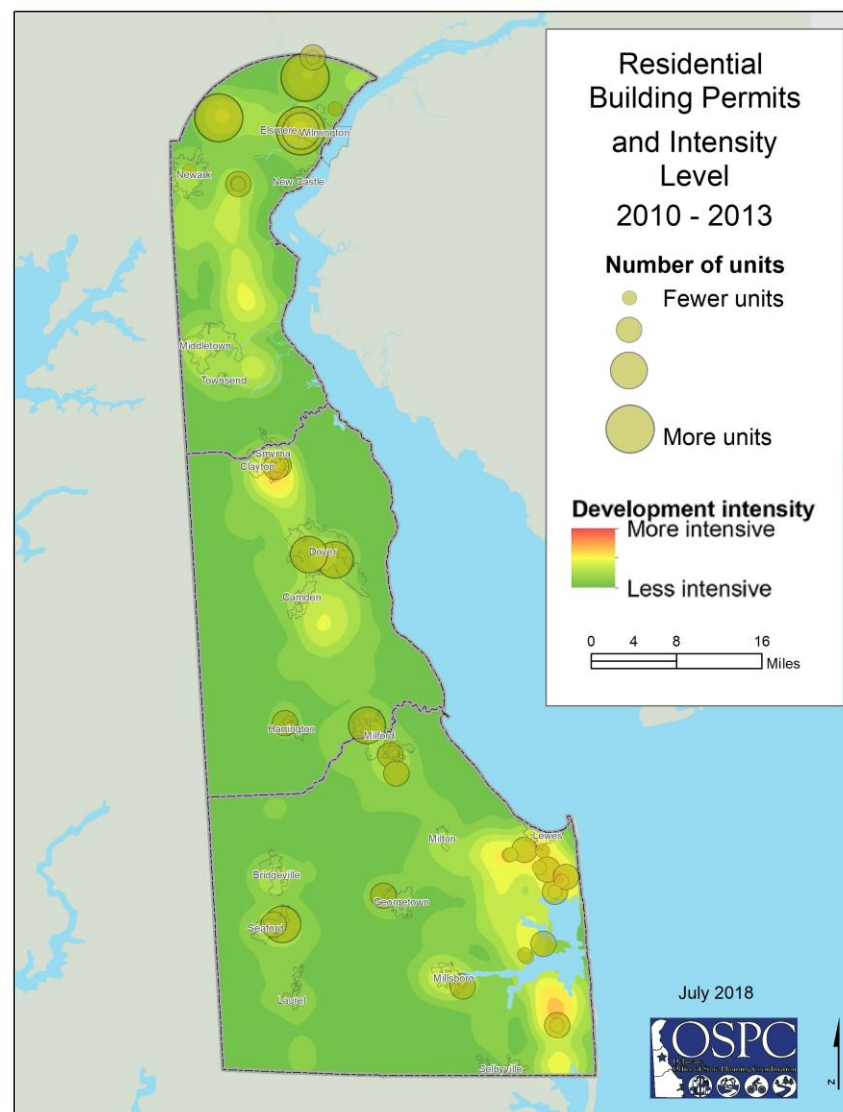
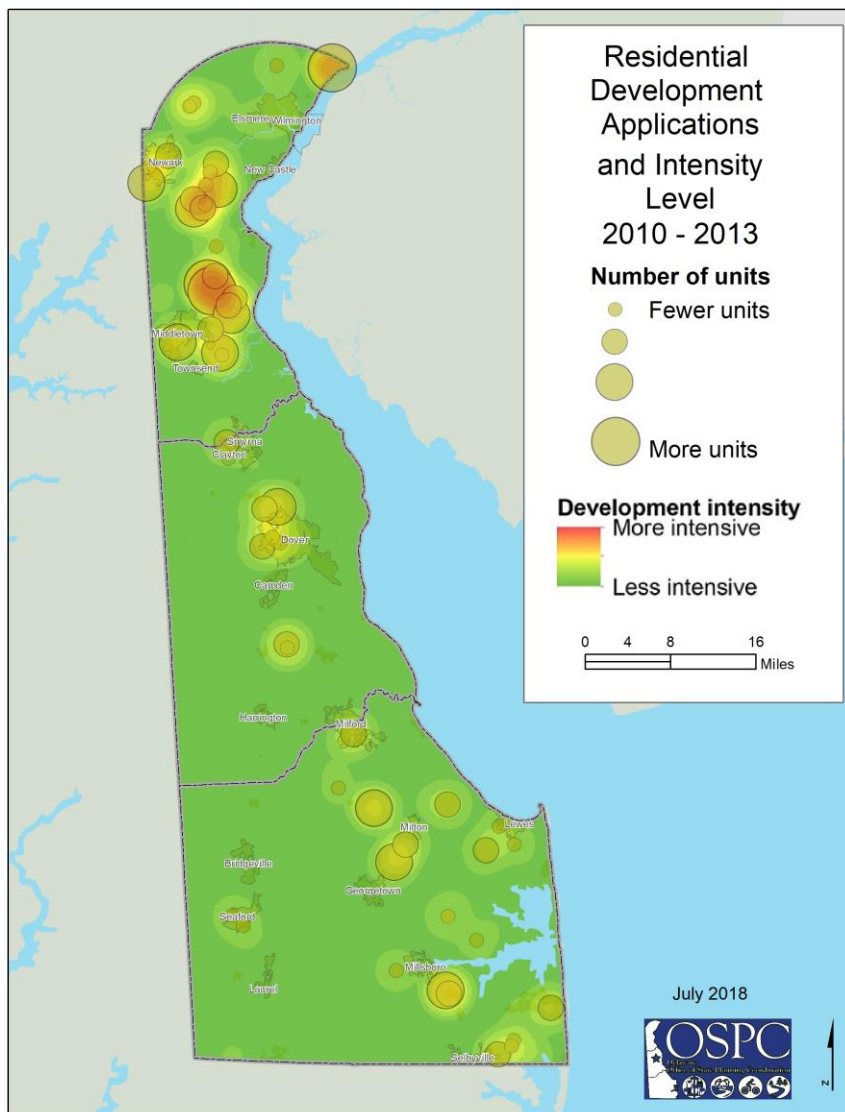
Based on these four maps it is possible to observe the greater intensity of development in the initial periods in the number of development applications, with a drop-off in later years, as well as the preponderance, particularly in the earlier years of units in New Castle County.

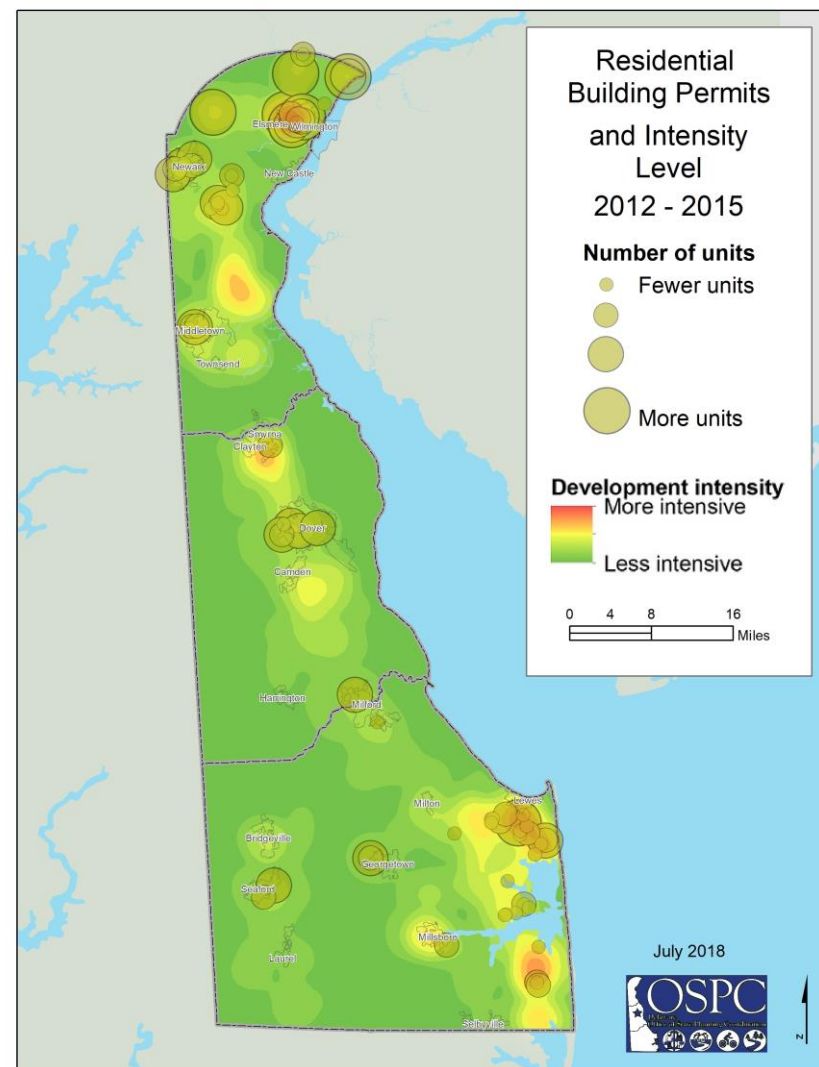
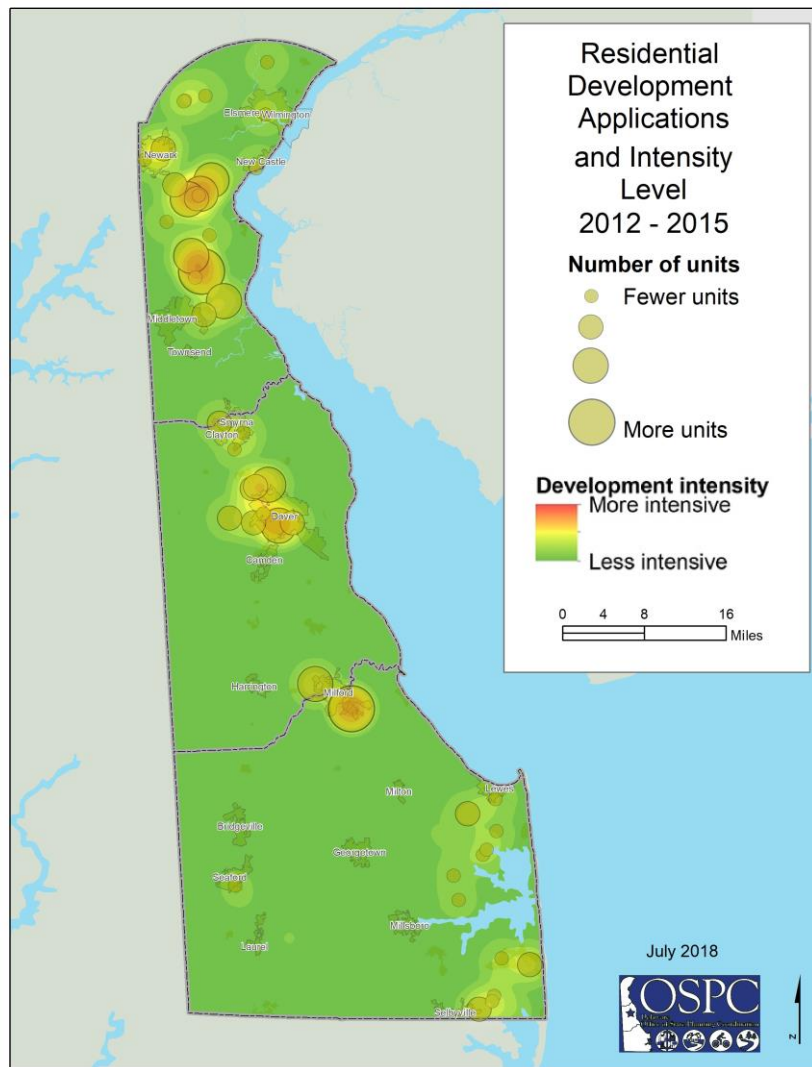
The number of building permits, inversely, saw a recovery in the later periods, with more intense development, particularly in southern New Castle County and the beach and Inland Bays region of Sussex County.

By calculating the difference between each of the four intensity (or “heat”) maps it is possible to determine the trend for each intervening period. The difference between the intensity of residential units in development applications and building permits between the one period (e.g., 2008 through 2011) and the next period (e.g., 2010 through 2013), highlights areas that are becoming “hotter” or “cooler” in terms of development. Figure A.5 shows the increase (red tones) or decrease (blue tones) in development intensity between each of the four periods.

Figure A.4 Residential Development Intensity Maps for Four Quadrennial Periods Between 2008 and 2017







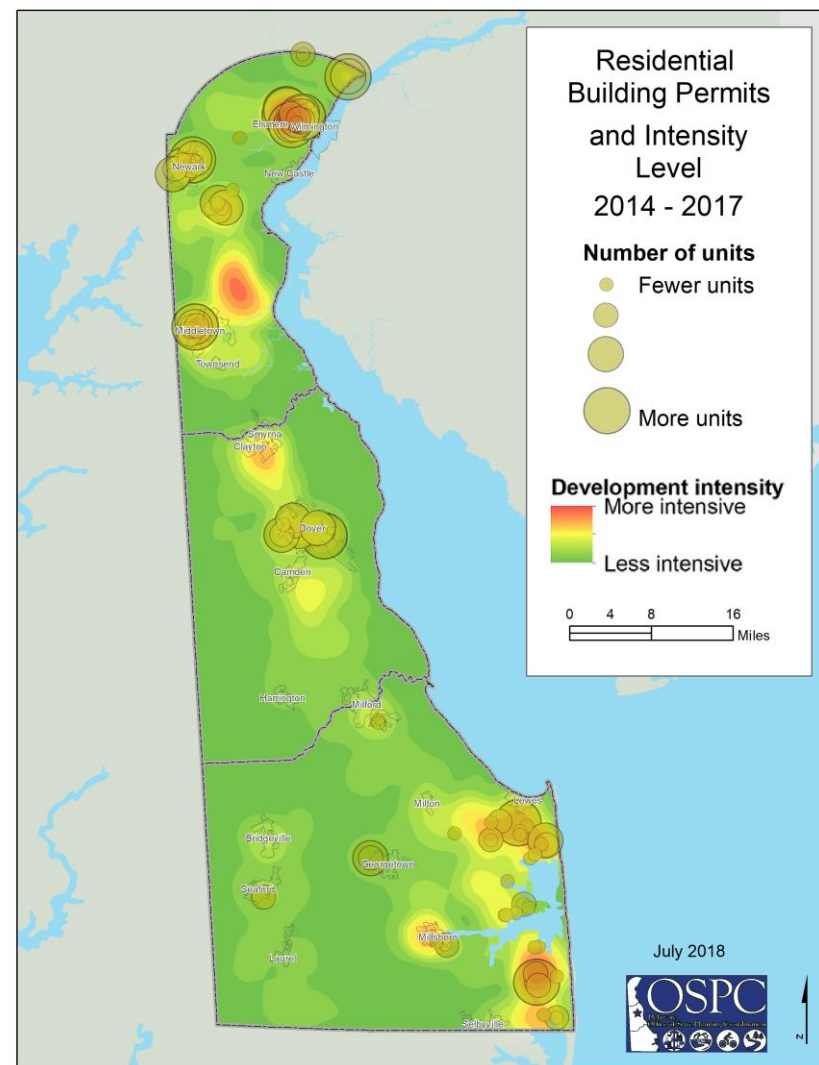
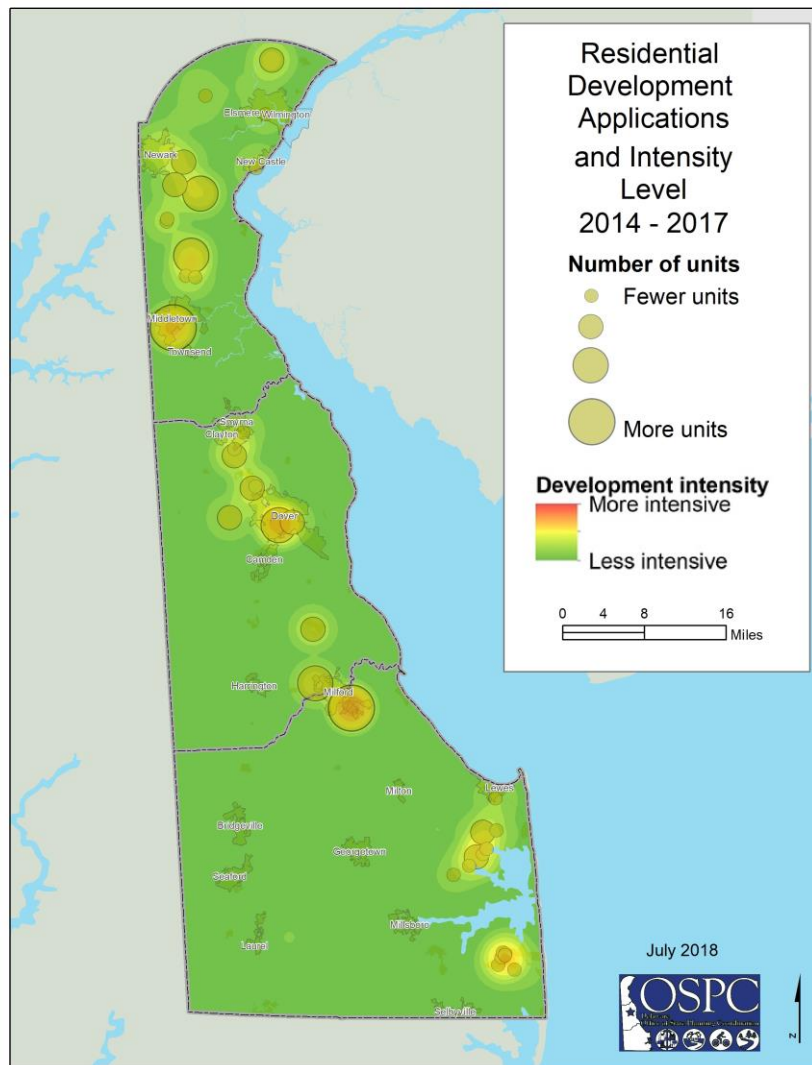
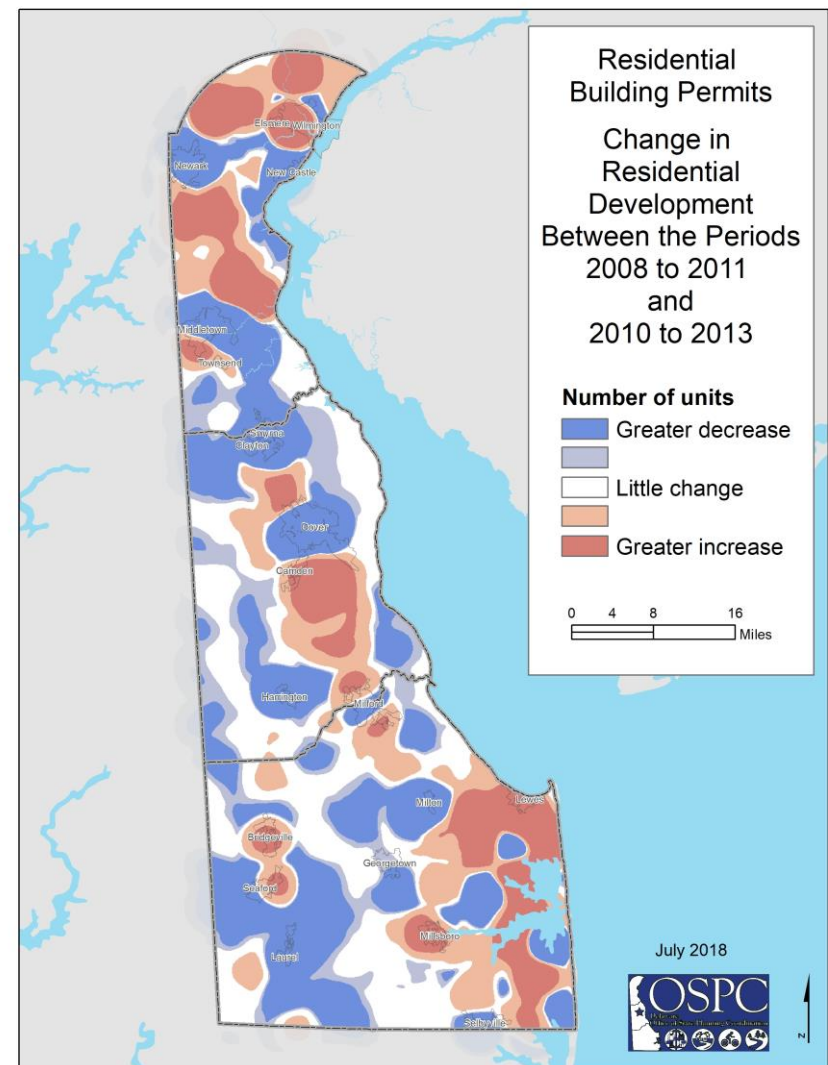
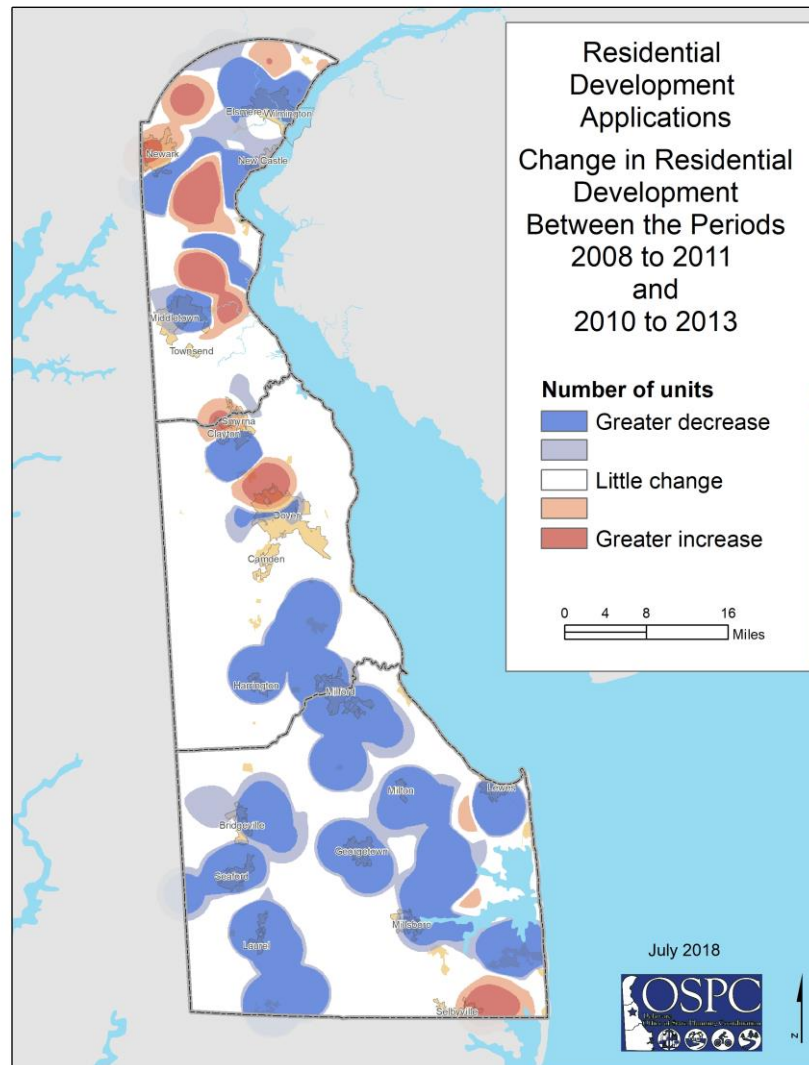
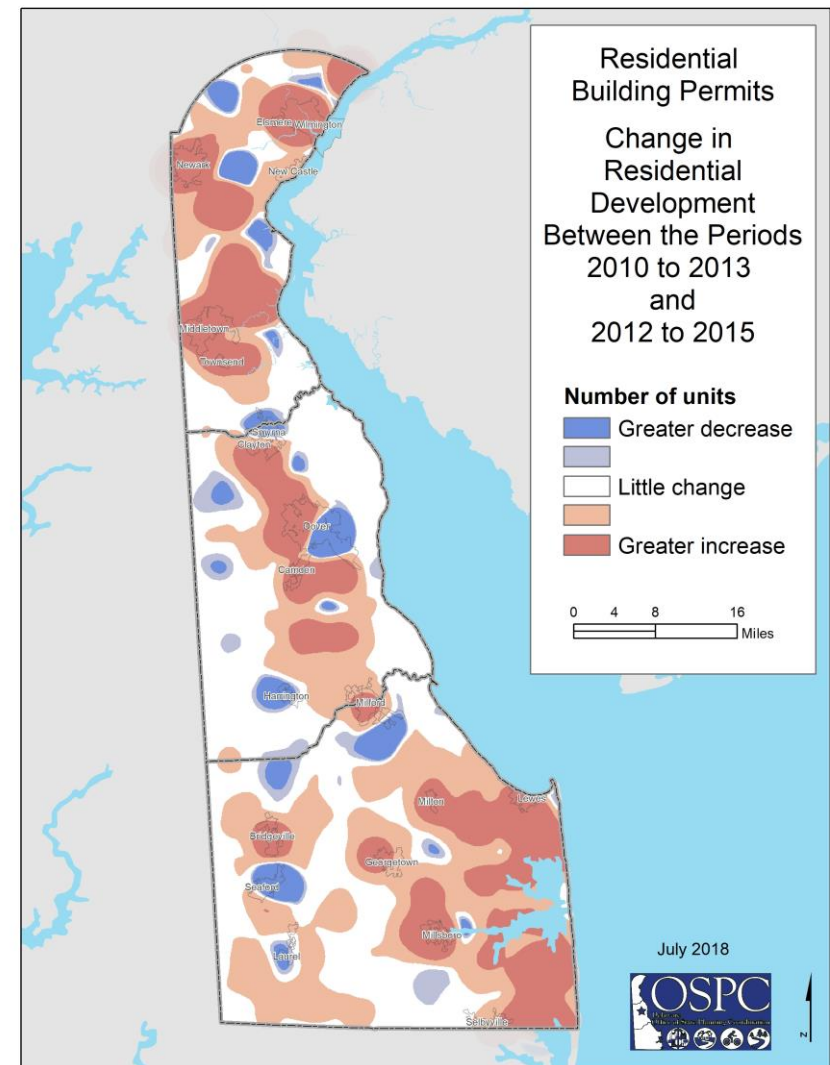
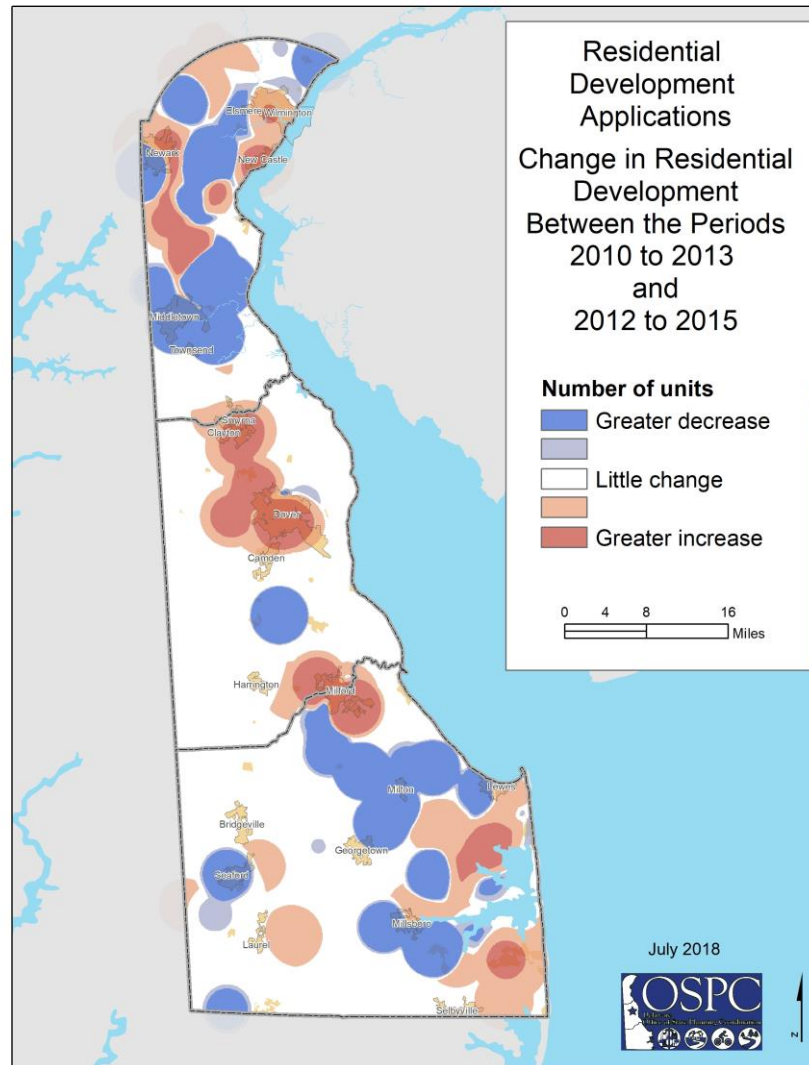
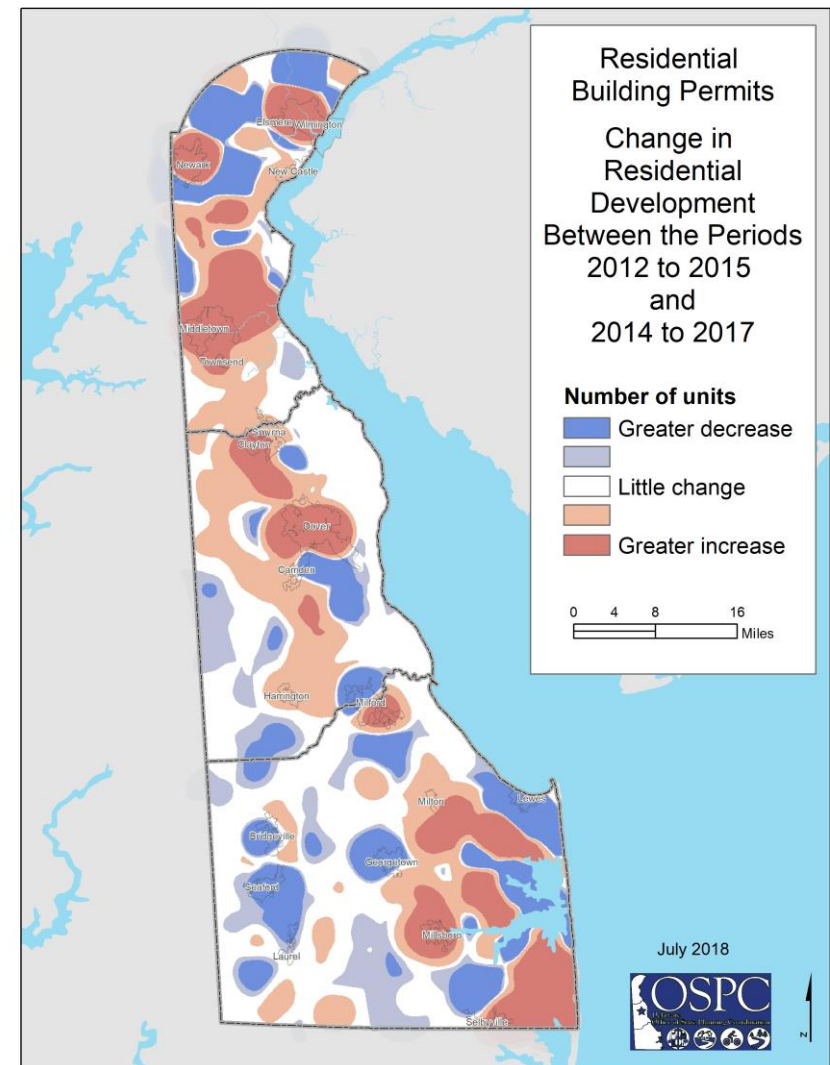
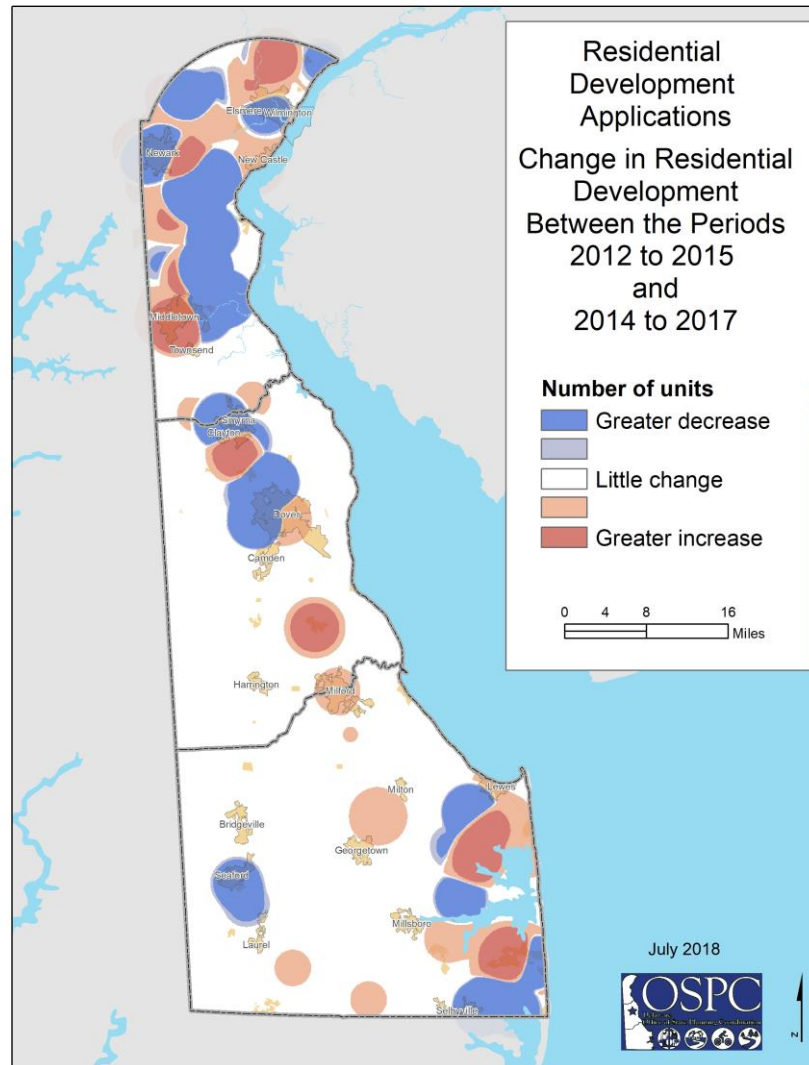


Figure A.5 Change in Residential Development Intensity Between Each Quadrennial Period (2008–2011, 2010–2013, 2012–2015, and 2014–2017)



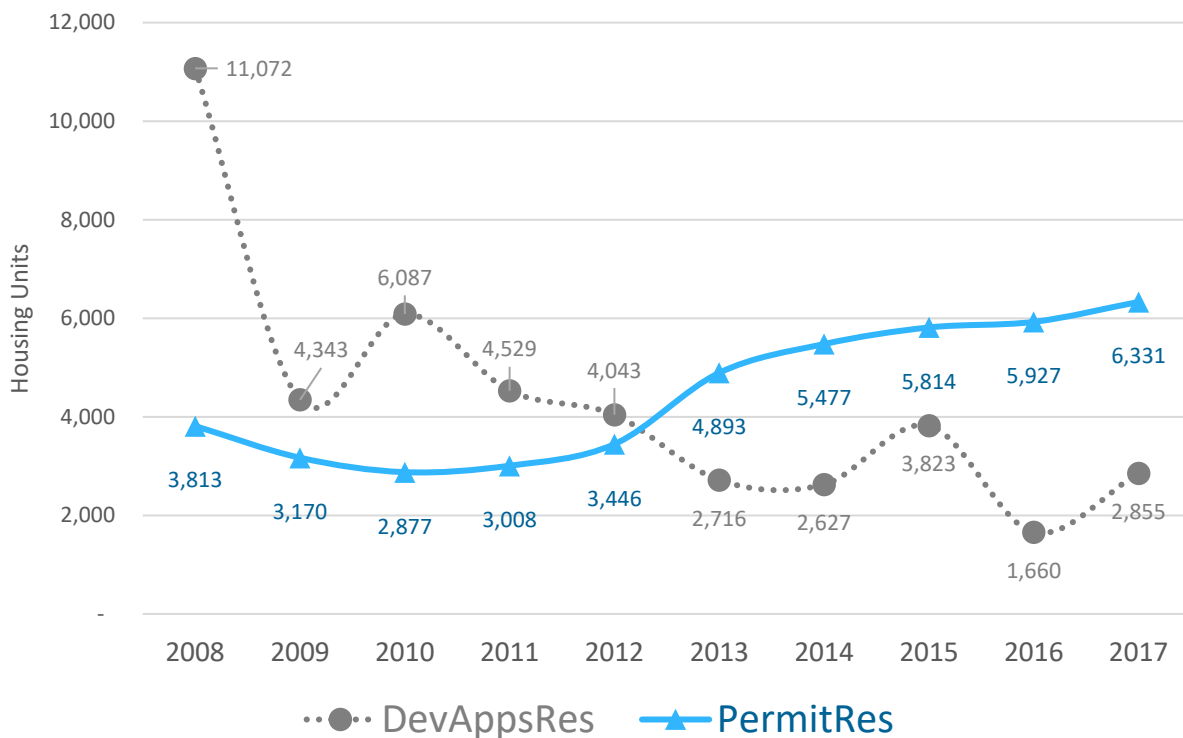




The first pair of maps above shows the overall “cooling” of the residential market between the first and second periods, following the economic downturn in 2008. In that period building permits in particular showed some strength in New Castle County, around the greater Dover area and the beaches. In the second period (second pair of maps) most of the state showed a marked increase in residential development activity. The third period saw continued growth but some slowdown in northern New Castle County and western Sussex County.

Figure A.6 presents the number of residential development applications compared with building permits (measured as number of units) across the 10-year period of record.

Figure A.6 Trendlines of Number of Residential Units in Development Applications (Gray Line) and Building Permits (Blue Line), 2008–2017



These trend lines show the steep drop-off in residential development application activity following 2008, and the variable but downward trend in subsequent years, through 2017. During that same period the number of residential units based on building permits saw a much shallower dip following the 2008 downturn, with a steady and continuous recovery since. This recovery was steepest at the end of the recessionary period, approximately 2012 to 2014, with a slowing of the increase in the most recent 5-year period.

Non-Residential Trends

Non-residential development includes commercial, office, industrial, and institutional uses. The unit of measure for this analysis is the total building square-footage of approved and permitted non-residential development.

Development Applications

Table A.8 presents a summary of non-residential square footage in approved development applications for the 6-year period from 2012 through 2017 by county in Delaware. During this time, a total of 14,597,972 square feet were approved for development by local governments in Delaware.

Table A.8 Non-Residential Square Footage Approved in Development Applications, by County, 2012–2017

County	2012	2013	2014	2015	2016	2017	Total
New Castle	3,115,308	2,090,496	1,254,744	845,829	1,652,375	1,942,087	10,900,839
Kent	344,307	292,839	344,333	693,592	405,361	899,432	2,979,864
Sussex	100,000	60,580	88,485	247,392	37,989	182,823	717,269
Total	3,559,615	2,443,915	1,687,562	1,786,813	2,095,725	3,024,342	14,597,972

Table A.9 shows the square footage for each year by local jurisdiction.

Table A.9 Non-Residential Square Footage Approved in Development Applications, by Local Jurisdiction, 2012–2017

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
New Castle County*	2,785,874	1,911,279	1,168,594	151,534	1,222,574	1,206,238	8,446,093
Elsmere	-	-	-	-	6,500	-	6,500
Middletown	2,950	148,416	56,234	676,196	249,839	648,293	1,781,928
New Castle	191,466	-	-	-	-	-	191,466
Newark	107,260	-	12,379	8,882	173,462	-	301,983
Townsend	-	-	9,217	9,217	-	-	18,434
Wilmington	27,758	30,801	8,320	-	-	87,556	154,435
New Castle Total	3,115,308	2,090,496	1,254,744	845,829	1,652,375	1,942,087	10,900,839
Kent County*	100,316	171,879	85,461	176,452	27,600	269,194	830,902
Cheswold	-	-	-	22,000	-	45,622	67,622
Dover	200,363	120,960	203,276	422,603	369,441	422,078	1,738,721
Harrington	-	-	-	-	-	6,777	6,777
Hartly	-	-	-	-	8,320	-	8,320
Milford	38,628	-	2,436	-	-	57,945	99,009
Smyrna	5,000	-	53,160	72,537	-	97,816	228,513
Kent Total	344,307	292,839	344,333	693,592	405,361	899,432	2,979,864
Sussex County*	-	38,280	-	-	-	-	38,280
Bridgeville	-	-	-	9,100	-	-	9,100
Georgetown	-	-	38,727	102,635	23,989	121,685	287,036

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
Laurel	-	-	1,560	119,500	-	-	121,060
Milford	-	-	-	16,157	-	1,242	17,399
Millsboro	-	-	-	-	-	54,294	54,294
Millville	-	16,000	-	-	-	-	16,000
Milton	100,000	-	-	-	-	-	100,000
Ocean View	-	1,500	-	-	14,000	-	15,500
Seaford	-	4,800	48,198	-	-	5,602	58,600
Sussex Total	100,000	60,580	88,485	247,392	37,989	182,823	717,269
State Total	3,559,615	2,443,915	1,687,562	1,786,813	2,095,725	3,024,342	14,597,972

*Represents development applications in unincorporated areas of the county

New Castle County in 2017 continues to show the strongest amount of non-residential development applications, with much of it occurring in Middletown and the surrounding area. Kent and Sussex Counties in 2017 saw an increased amount of non-residential development applications (based on square footage) relative to other years, particularly in Dover and Georgetown.

The following table (Table A.10) summarizes non-residential square footage in development applications for the 6-year period, 2012 through 2017, by county, for the entire state, and by *State Strategies* investment level. Alignment with the *State Strategies*—to what degree development is being focused in designated Investment Levels—is an important indicator of whether the direction of non-residential development is following the priorities and vision set forth by the OSPC and other state agencies.

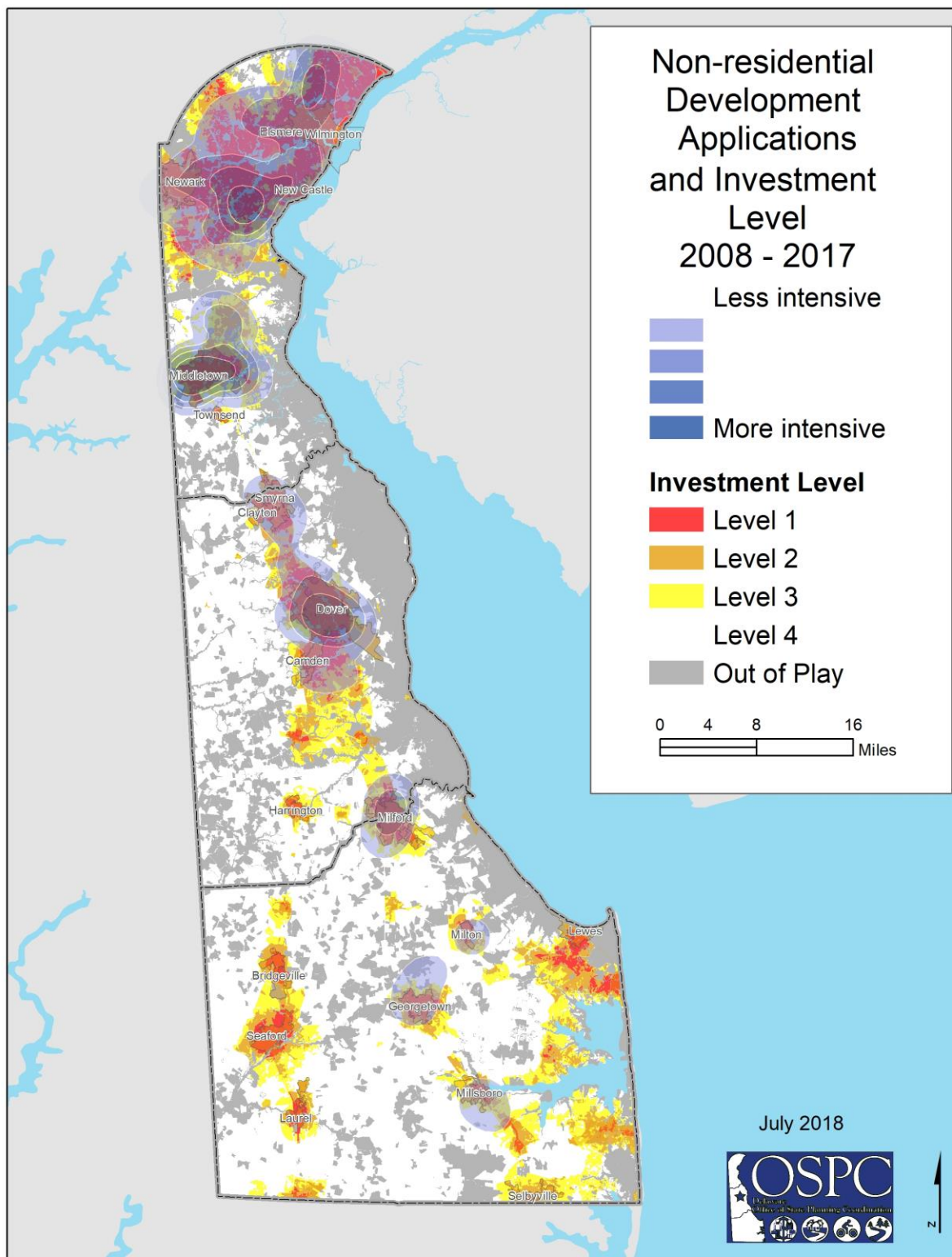
Table A.10 Non-Residential Housing Units Based on Development Applications, by County and Statewide, by *State Strategies* Investment Level, 2012–2017

	2012	2013	2014	2015	2016	2017	2012–2017
New Castle	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Total Sq. Ft.
Level 1 & 2	2,907,026	2,081,351	1,149,147	574,364	1,527,348	1,884,559	10,123,795
Level 3	42,171	-	92,892	15,742	112,627	2,200	265,632
Level 4	-	-	-	-	-	-	-
New Castle							
Total	2,949,197	2,081,351	1,242,039	590,106	1,639,975	1,886,759	10,389,427
Kent							
Level 1 & 2	300,792	120,533	267,196	649,650	397,476	823,143	2,558,790
Level 3	-	60,193	-	25,130	-	-	85,323
Level 4	6,752	-	8,320	576	-	74,080	89,728
Kent Total	307,544	180,726	275,516	675,356	397,476	897,223	2,733,841
Sussex							
Level 1 & 2	100,000	32,800	86,925	247,392	37,989	182,823	687,929
Level 3	-	25,980	-	-	-	-	25,980
Level 4	-	1,800	-	-	-	-	1,800
Sussex Total	100,000	60,580	86,925	247,392	37,989	182,823	715,709
Delaware							
Level 1 & 2	3,307,818	2,234,684	1,503,268	1,471,406	1,962,813	2,890,525	13,370,514
Level 3	42,171	86,173	92,892	40,872	112,627	2,200	376,935
Level 4	6,752	1,800	8,320	576	-	74,080	91,528
State Total	3,356,741	2,322,657	1,604,480	1,512,854	2,075,440	2,966,805	13,838,977

Non-residential Development Intensity Map, Development Applications

To assess the intensity of non-residential development (as measured by square footage approved in development applications), data for the period of record (2008 to 2017) were summarized in a “heat-map.” The map in Figure A.7 shows the intensity of that development (in shades of blue) overlaid on the *State Strategies* map of investment levels.

Figure A.7 Development Intensity Levels Based on Non-Residential Development Activity in Development Applications, 2008–2017, Overlaid on the *State Strategies*



Building Permits

Building permit data represent development that has been permitted and is ready to move forward to the construction phase. These permits represent building that is very likely to occur in the near future, and therefore represent a good measure of building activity in the near term.

Table A.11 presents a summary of non-residential building square footage based on building permits for the 6-year period from 2012 through 2017 by county in Delaware. A total of 20,915,387 square feet of building space were approved for development by local governments in Delaware in that period.

Table A.11 Non-Residential Square Footage Approved by Building Permit, by County, 2012–2017

County	2012	2013	2014	2015	2016	2017	Total
New Castle	2,842,924	1,545,518	2,324,904	1,877,562	2,079,265	2,909,565	13,579,738
Kent	252,944	355,212	382,310	342,037	489,791	325,072	2,147,366
Sussex	1,427,509	372,588	682,484	1,129,779	1,091,791	484,132	5,188,283
Total	4,523,377	2,273,318	3,389,698	3,349,378	3,660,847	3,718,769	20,915,387

Table A.12 shows the square footage approved for each year by local jurisdiction.

Table A.12 Non-Residential Square Footage Approved by Building Permit, by Local Jurisdiction, 2012–2017

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
New Castle County*	1,241,297	1,399,888	2,118,840	1,177,856	1,483,058	2,156,092	9,577,031
Delaware City	-	3,600	-	-	-	-	3,600
Elsmere	-	-	-	745	-	-	745
Middletown	1,322,377	117,750	52,503	193,320	132,242	352,929	2,171,121
New Castle	1,200	-	58,310	-	-	-	59,510
Newark	-	-	73,144	97,367	130,417	269,826	570,754
Townsend	-	-	-	-	6,000	-	6,000
Wilmington	278,050	24,280	22,107	408,274	327,548	130,718	1,190,977
New Castle Total	2,842,924	1,545,518	2,324,904	1,877,562	2,079,265	2,909,565	13,579,738
Kent County*	23,145	143,773	63,991	226,906	163,584	36,427	657,826
Bowers Beach	-	-	-	-	1,821	-	1,821
Camden	62,556	33,420	-	-	21,099	20,371	137,446
Cheswold	-	-	8,320	4,025	-	22,000	34,345
Dover	93,739	142,041	246,086	101,506	260,710	152,027	996,109
Farmington	-	-	8,500	-	-	-	8,500
Felton	9,100	-	-	-	-	2,400	11,500
Frederica	-	3,350	8,320	-	-	-	11,670
Harrington	-	-	-	-	-	6,777	6,777
Hartly	-	6,375	-	-	8,320	-	14,695
Houston	-	-	-	-	2,560	-	2,560
Milford	21,984	25,425	37,493	-	12,600	36,470	133,972

Jurisdiction	2012	2013	2014	2015	2016	2017	2012–2017
Smyrna	42,420	828	9,600	9,600	19,097	24,600	106,145
Woodside	-	-	-	-	-	24,000	24,000
Kent Total	252,944	355,212	382,310	342,037	489,791	325,072	2,147,366
Sussex County*	811,786	131,931	298,244	386,892	438,095	262,378	2,329,326
Bethany Beach	-	-	132,845	-	-	8,800	141,645
Blades	-	-	-	3,700	-	-	3,700
Bridgeville	-	-	28,958	-	-	-	28,958
Dagsboro	34,141	-	-	-	-	-	34,141
Delmar	-	8,282	15,178	-	-	2,280	25,740
Dewey Beach	-	-	28,800	-	-	2,200	31,000
Fenwick Island	-	-	-	-	3,049	-	3,049
Frankford	-	-	-	-	2,130	3,226	5,356
Georgetown	20,530	131,419	55,797	120,635	22,832	108,757	459,970
Greenwood	25,000	-	-	-	-	-	25,000
Laurel	-	-	1,560	9,180	151,885	-	162,625
Lewes	-	6,000	51,040	-	4,000	3,000	64,040
Milford	4,800	-	-	602,065	437,000	-	1,043,865
Millsboro	55,863	12,159	15,154	2,307	-	55,120	140,603
Millville	9,700	36,184	-	-	21,000	1,692	68,576
Milton	101,000	-	4,050	-	7,000	-	112,050
Ocean View	13,000	4,149	-	-	-	13,920	31,069
Rehoboth Beach	-	2,080	-	-	-	9,597	11,677
Seaford	351,689	5,880	43,044	5,000	4,800	8,898	419,311
Selbyville	-	34,504	7,814	-	-	4,264	46,582
Sussex Total	1,427,509	372,588	682,484	1,129,779	1,091,791	484,132	5,188,283
State Total	4,523,377	2,273,318	3,389,698	3,349,378	3,660,847	3,718,769	20,915,387

*Represents development applications in unincorporated areas of the county

Non-residential square footage based on building permits has been focused in New Castle County over the period. In Kent and Sussex Counties building permits have been primarily issued in incorporated towns including Dover, Georgetown, and Milford, while New Castle non-residential development has largely occurred outside incorporated areas.

Table A.13 summarizes non-residential square footage based on building permits for the 6-year period, 2012 through 2017, by county, for the entire state, and by *State Strategies* investment level.

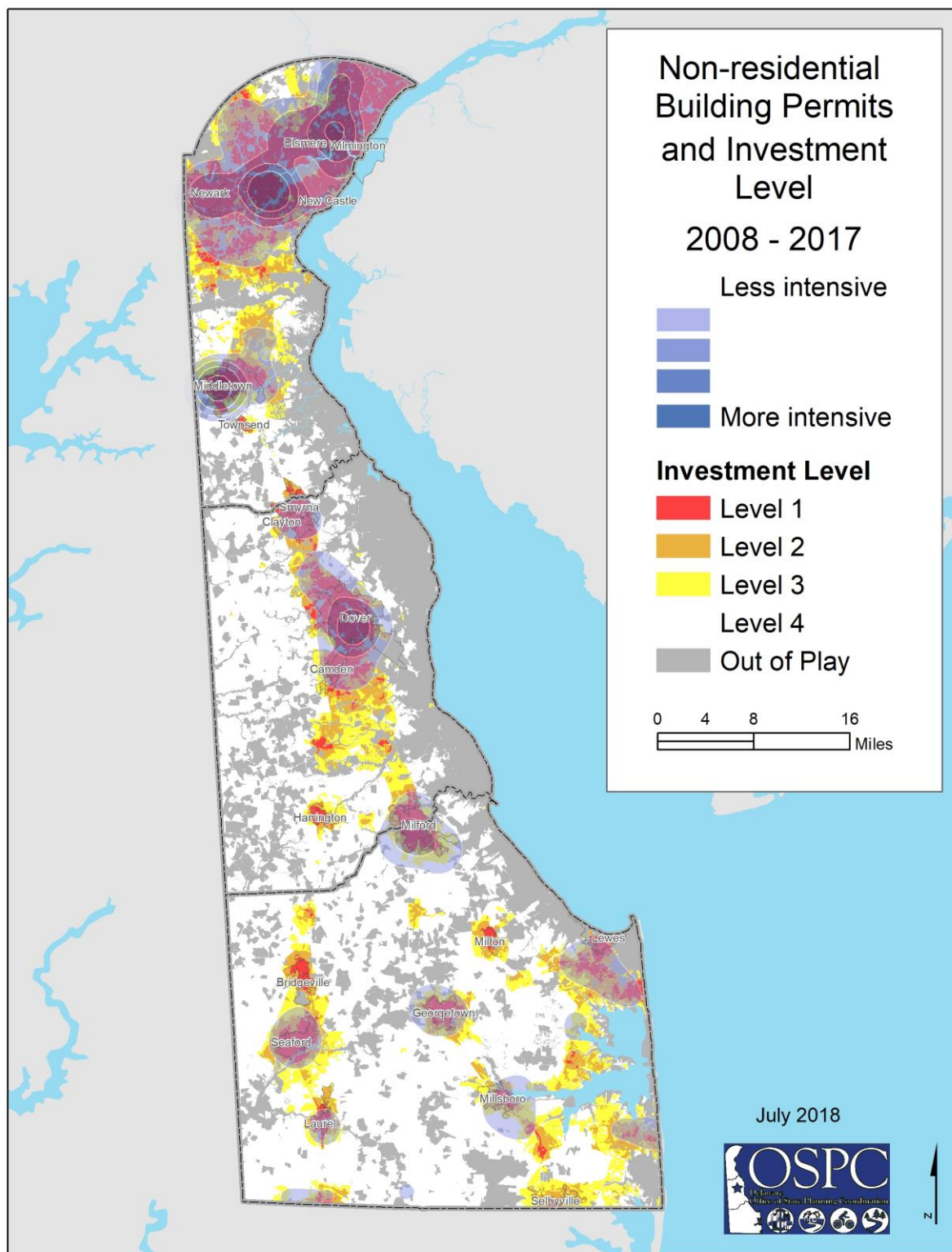
Table A.13 Non-Residential Building Square Feet Based on Building Permits, by County and Statewide, by *State Strategies* Investment Level, 2012–2017

	2012	2013	2014	2015	2016	2017	2012–2017
	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Sq. Ft.	Total Sq. Ft.
New Castle							
Level 1 & 2	2,800,790	1,516,512	2,311,477	1,833,443	2,021,800	2,863,375	13,347,397
Level 3	18,575	-	4,600	36,563	49,388	1,287	110,413
Level 4	23,559	29,006	8,827	7,556	8,077	44,903	121,928
New Castle Total	2,842,924	1,545,518	2,324,904	1,877,562	2,079,265	2,909,565	13,579,738
Kent							
Level 1 & 2	226,089	320,537	322,344	171,963	473,430	290,120	1,804,483
Level 3	-	7,815	8,500	360	7,981	31,837	56,493
Level 4	26,855	26,860	51,466	169,714	8,380	3,115	286,390
Kent Total	252,944	355,212	382,310	342,037	489,791	325,072	2,147,366
Sussex							
Level 1 & 2	679,215	315,688	465,022	906,061	888,870	293,944	3,548,800
Level 3	244,300	34,626	112,972	20,298	110,984	34,360	557,540
Level 4	503,994	22,274	104,490	203,420	91,937	155,828	1,081,943
Sussex Total	1,427,509	372,588	682,484	1,129,779	1,091,791	484,132	5,188,283
Delaware							
Level 1 & 2	3,706,094	2,152,737	3,098,843	2,911,467	3,384,100	3,447,439	18,700,680
Level 3	262,875	42,441	126,072	57,221	168,353	67,484	724,446
Level 4	554,408	78,140	164,783	380,690	108,394	203,846	1,490,261
State Total	4,523,377	2,273,318	3,389,698	3,349,378	3,660,847	3,718,769	20,915,387

Non-residential Development Intensity Map, Building Permits

The “heat map” in Figure A.8 shows the intensity of development as measured by non-residential square footage based on building permits (in shades of blue), overlaid on the *State Strategies* map of investment levels.

Figure A.8 Development Intensity Levels Based on Non-Residential Development Activity in Building Permits, 2008–2017, Overlaid on the *State Strategies*.

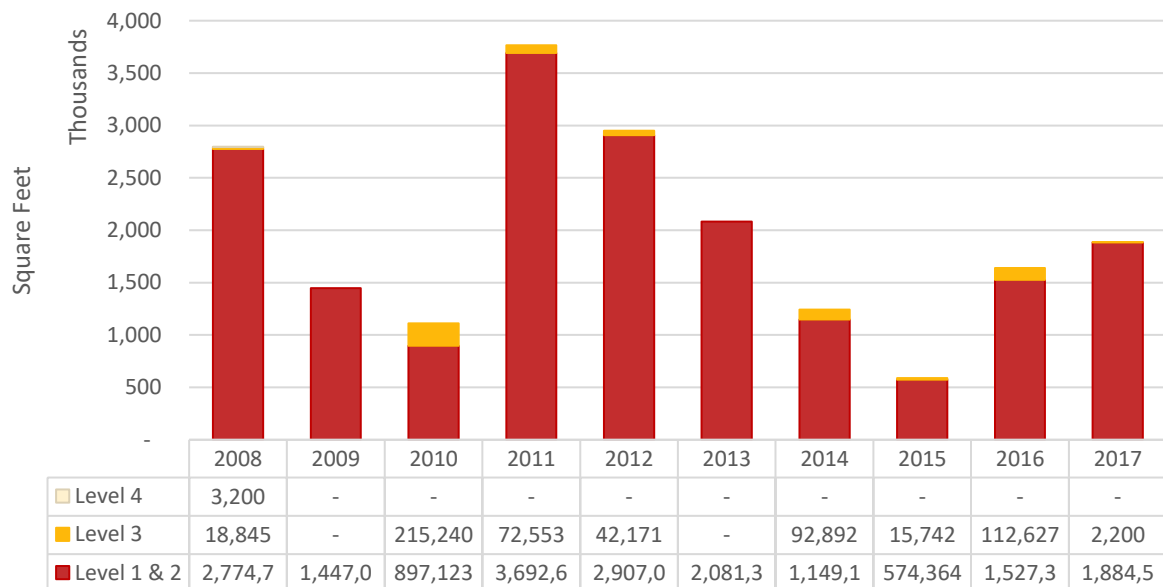


Non-Residential Trends Analysis

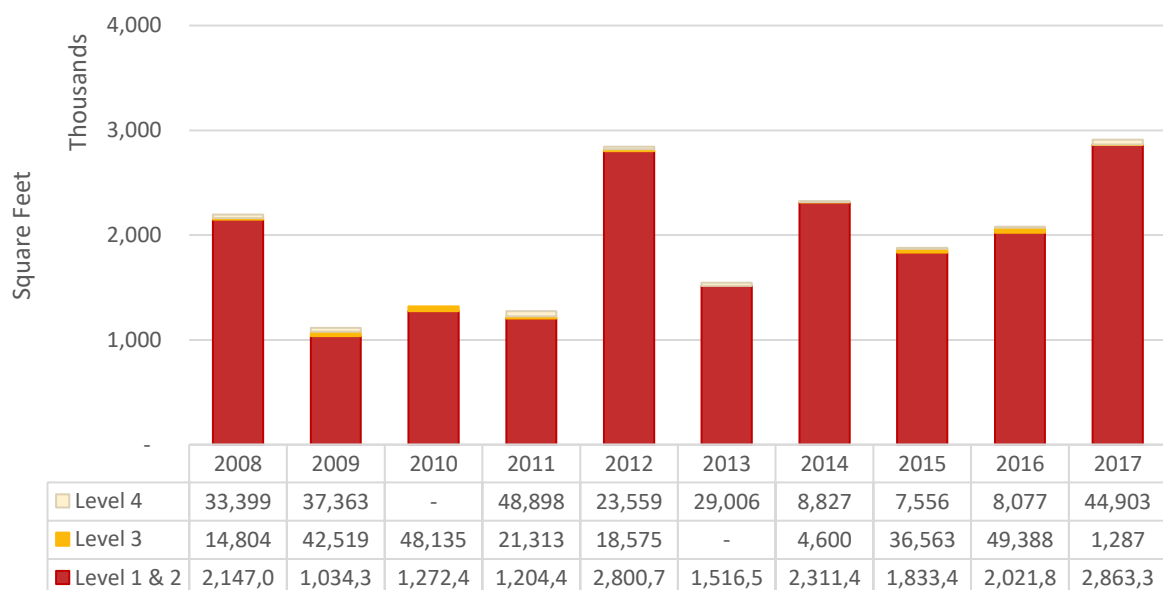
Figure A.9 present the trends in non-residential square footage based on development applications and building permits, by county and summarized for the entire state, for the entire period of record, from 2008 through 2017. The data presented are also subdivided based on the *State Strategies* investment level in which they fall.

Figure A.8 – Non-residential development trends by county and statewide, by *State Strategies* zone, 2008–2017.

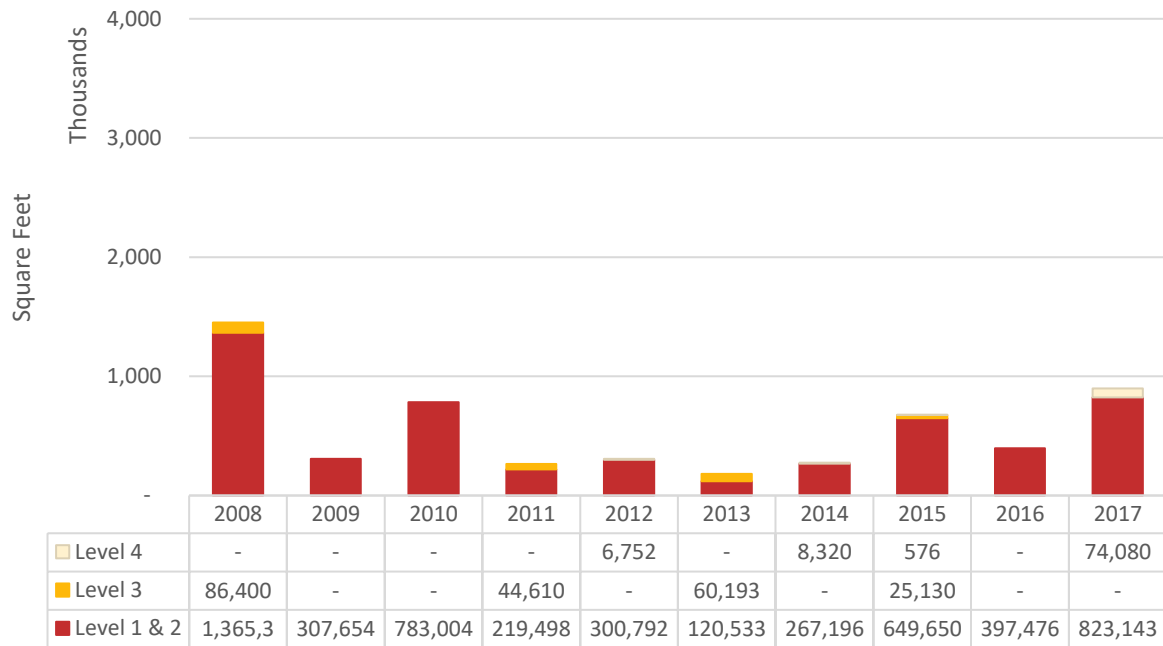
Development Applications, New Castle County



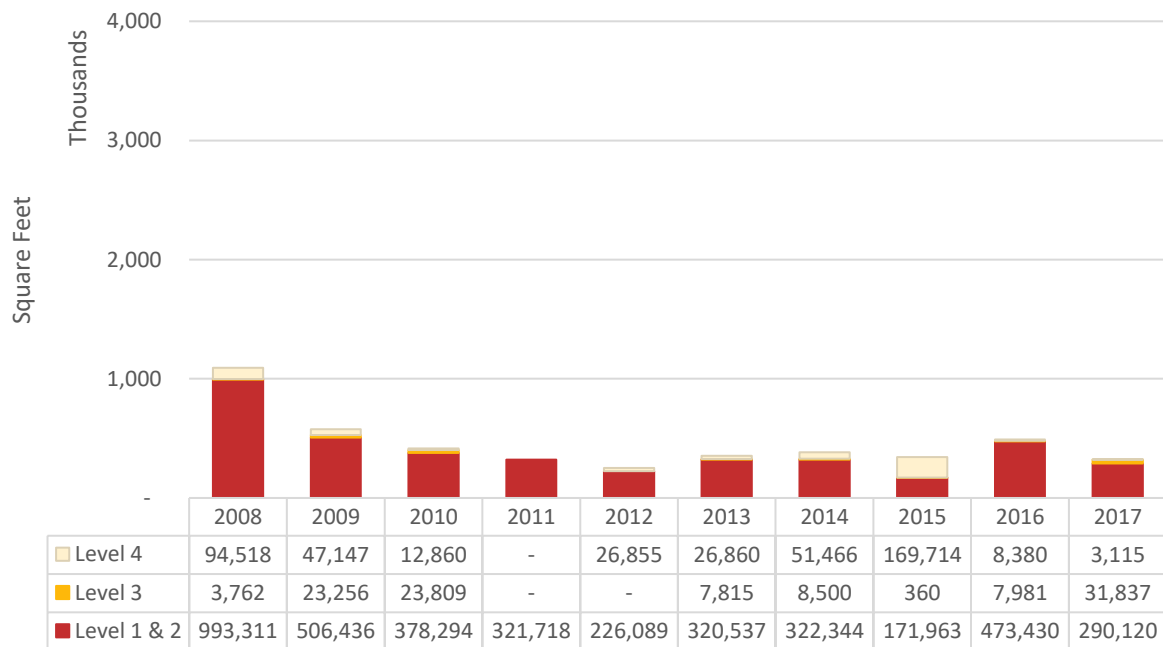
Building Permits, New Castle County



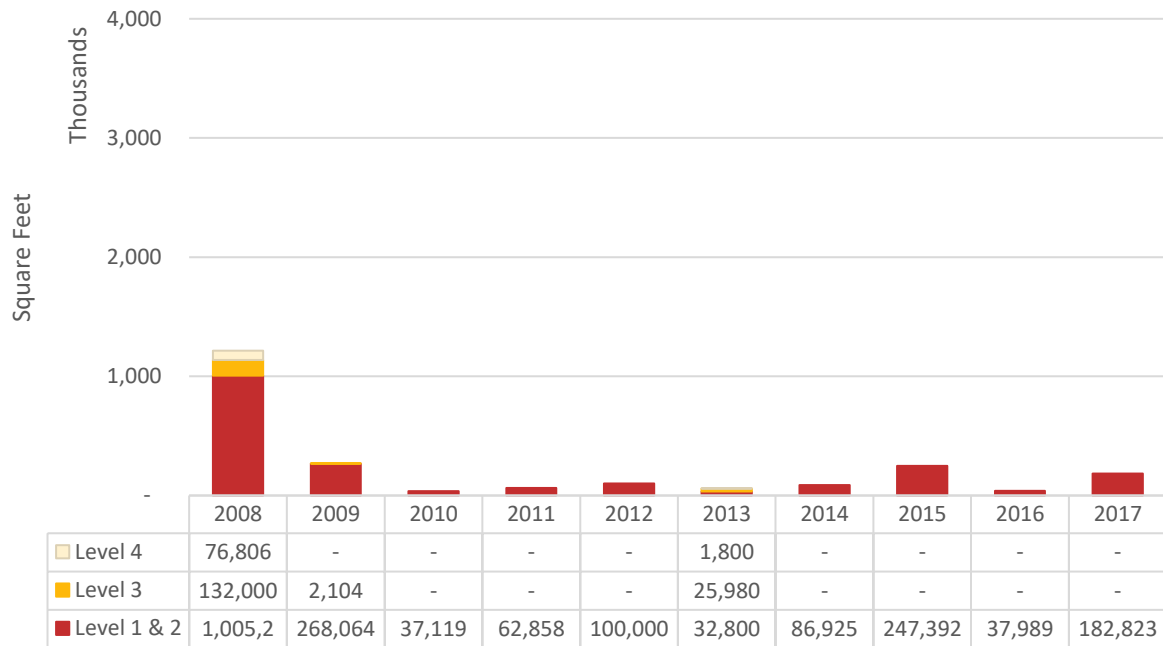
Development Applications, Kent County



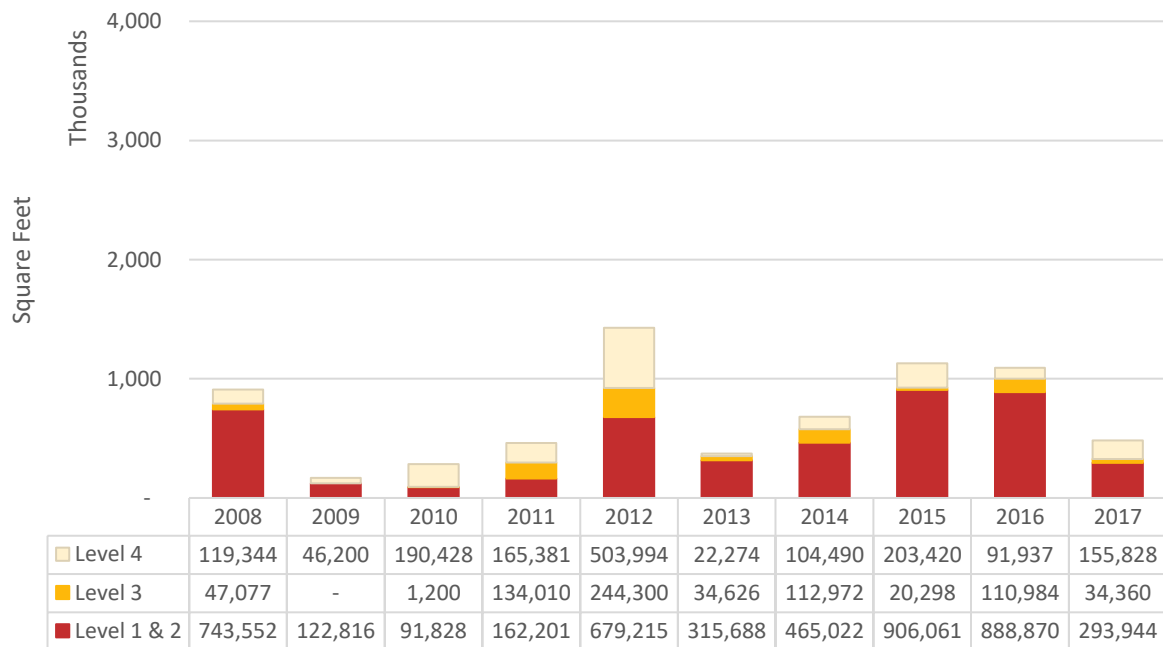
Building Permit, Kent County



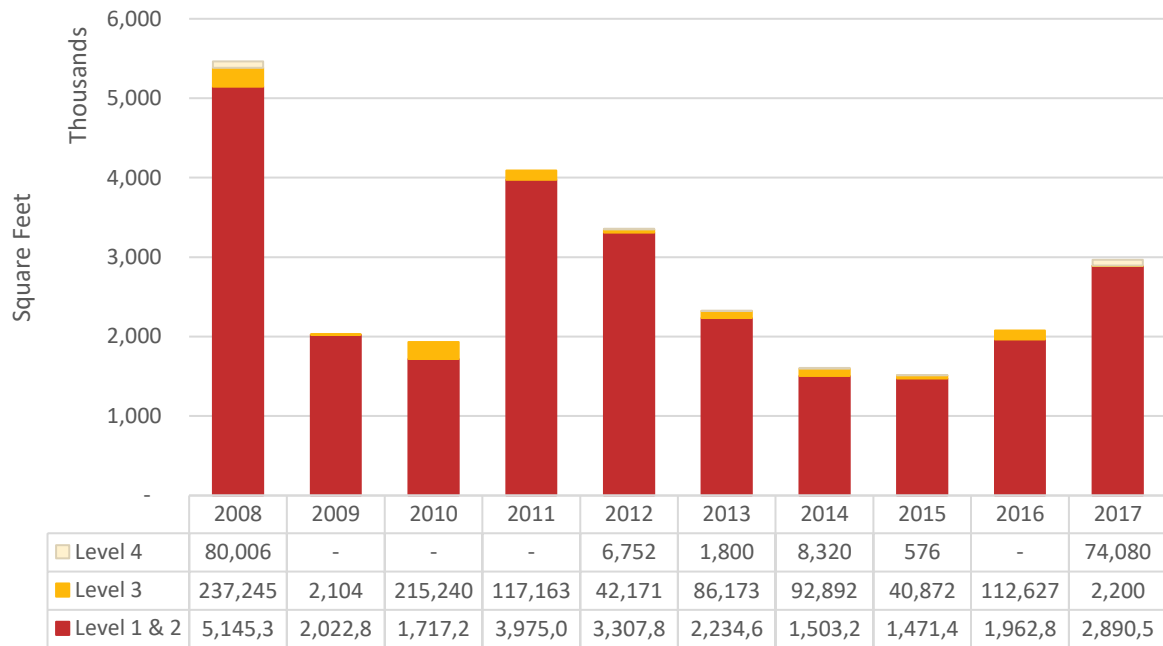
Development Applications, Sussex County



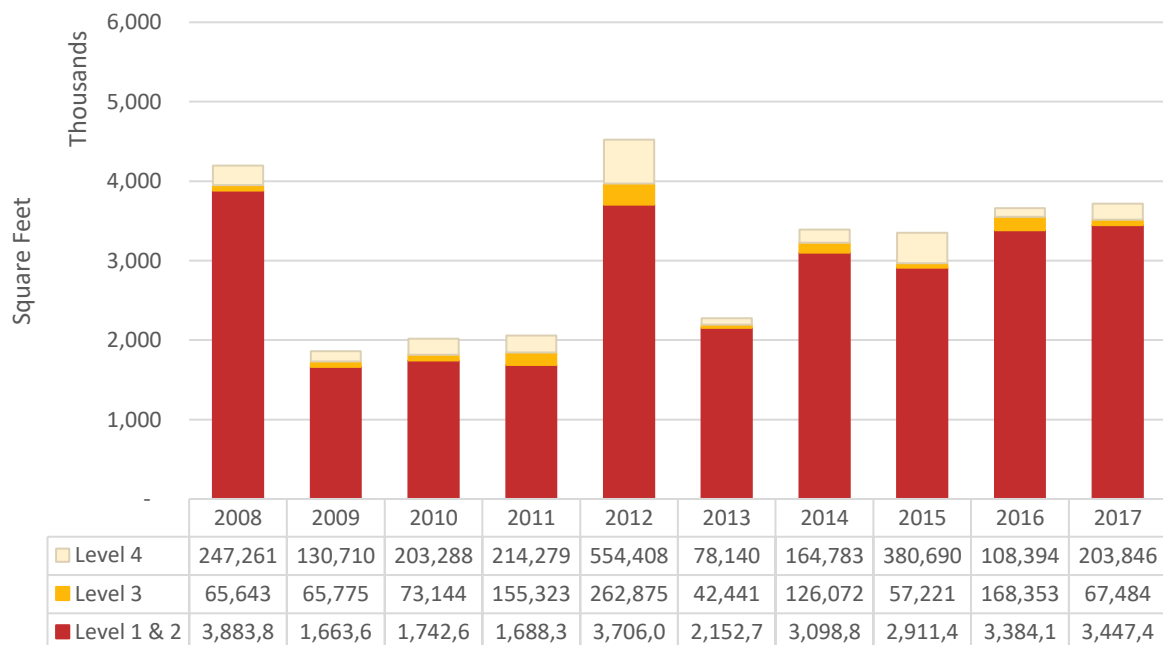
Building Permits, Sussex County



Development Applications, State of Delaware



Building Permits, State of Delaware



These graphs illustrate the preponderance of non-residential development in New Castle County as compared to the rest of the state. Following the steep decline in square footage in development applications and building permits in the years after 2008, there was a strong recovery in 2012,

particularly in New Castle County. Sussex County saw some rebound at much lower levels, and Kent County, while the amount of non-residential development was low, saw a modest recovery. For 2017, New Castle County saw strong growth, while the other two counties experienced a slight downturn.

Non-Residential Development Intensity Trends

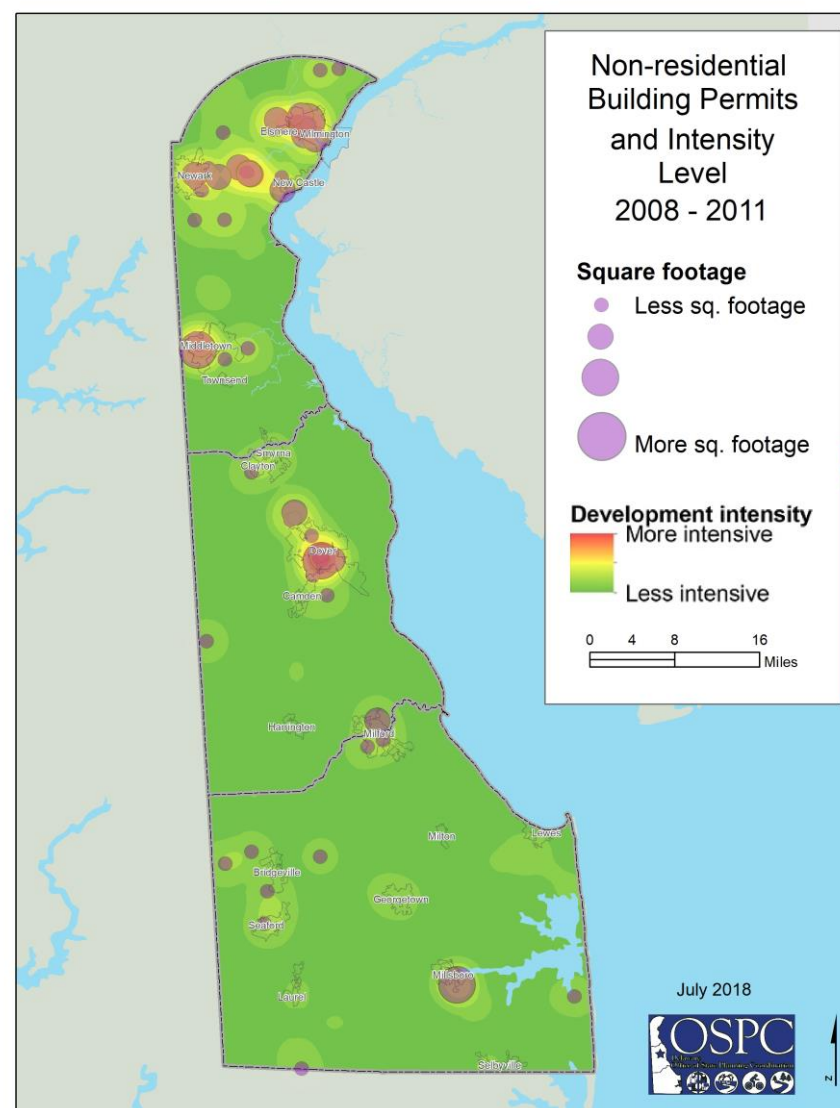
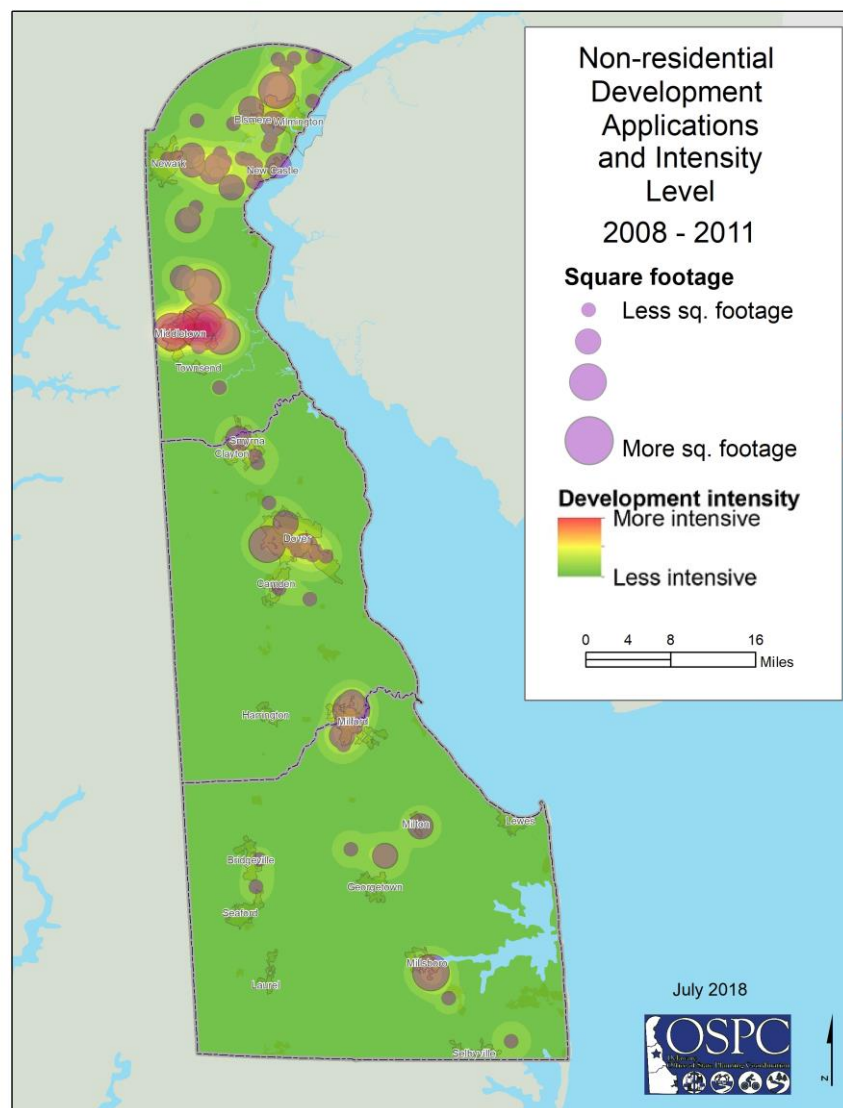
In addition to mapping the intensity of development across the ten year period of record (2008 – 2017), a series of four-year intensity maps were produced to assess and characterize shorter-term periods. The intensity of non-residential development (based on development applications and building permits) was mapped for the four periods 2008 to 2011, 2010 to 2013, 2012 to 2015, and 2014 to 2017. See Table A.7, above, for a depiction of the four year overlapping time periods.

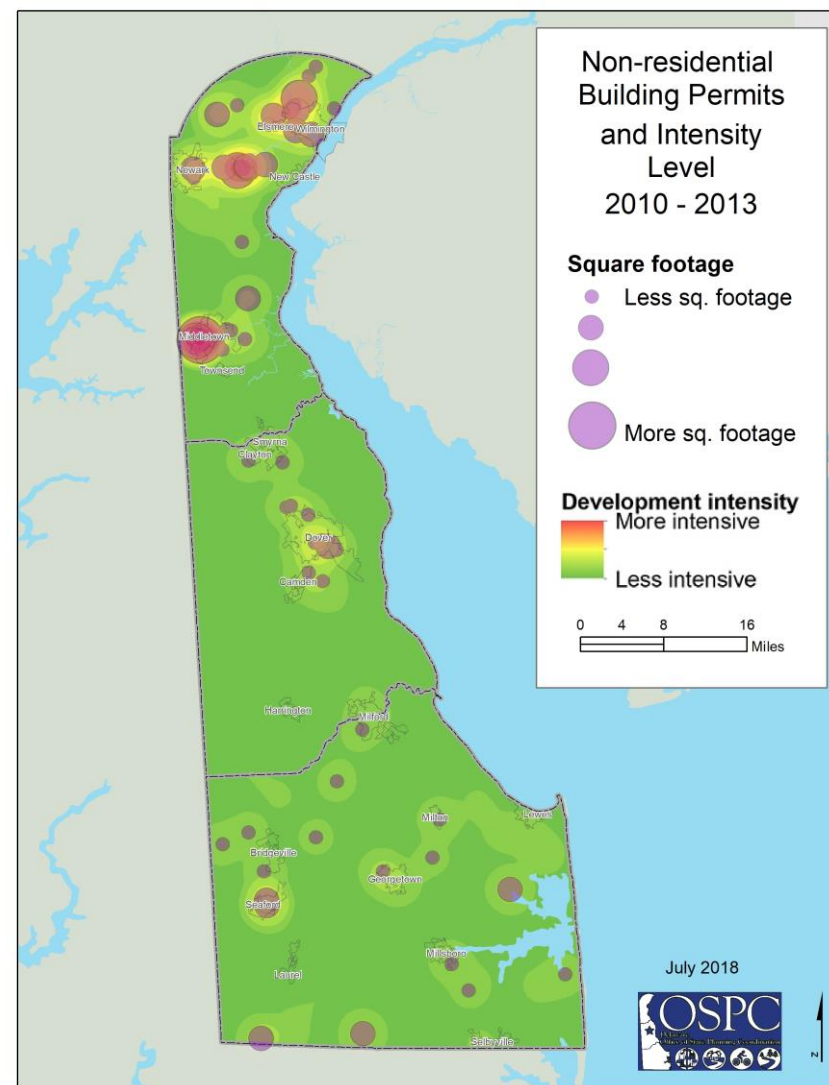
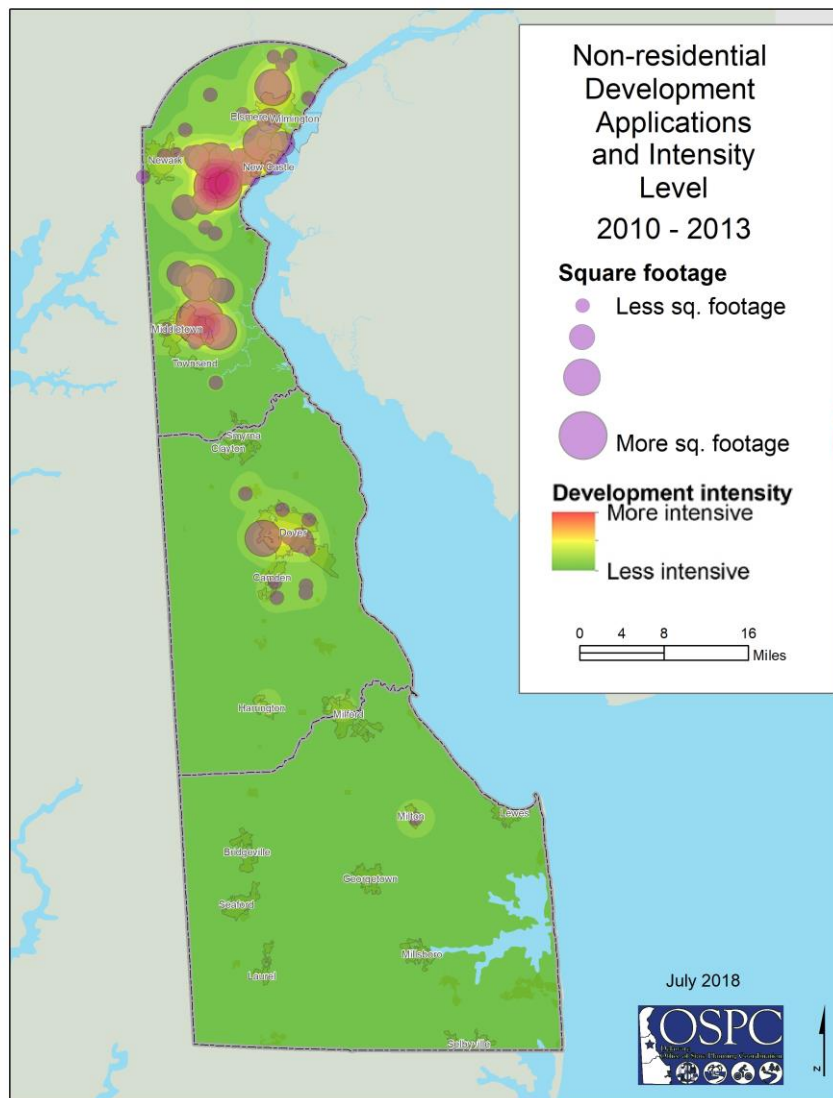
Figure A.10 depicts development intensity (or “heat”) maps for each four year period, including dots indicating the location and degree (in amount of building square footage) of development applications and building permits. Note that the dots do not depict every project, but show only applications and permits above a threshold of total square footage proposed for a project (approximately 32,600 building square feet).

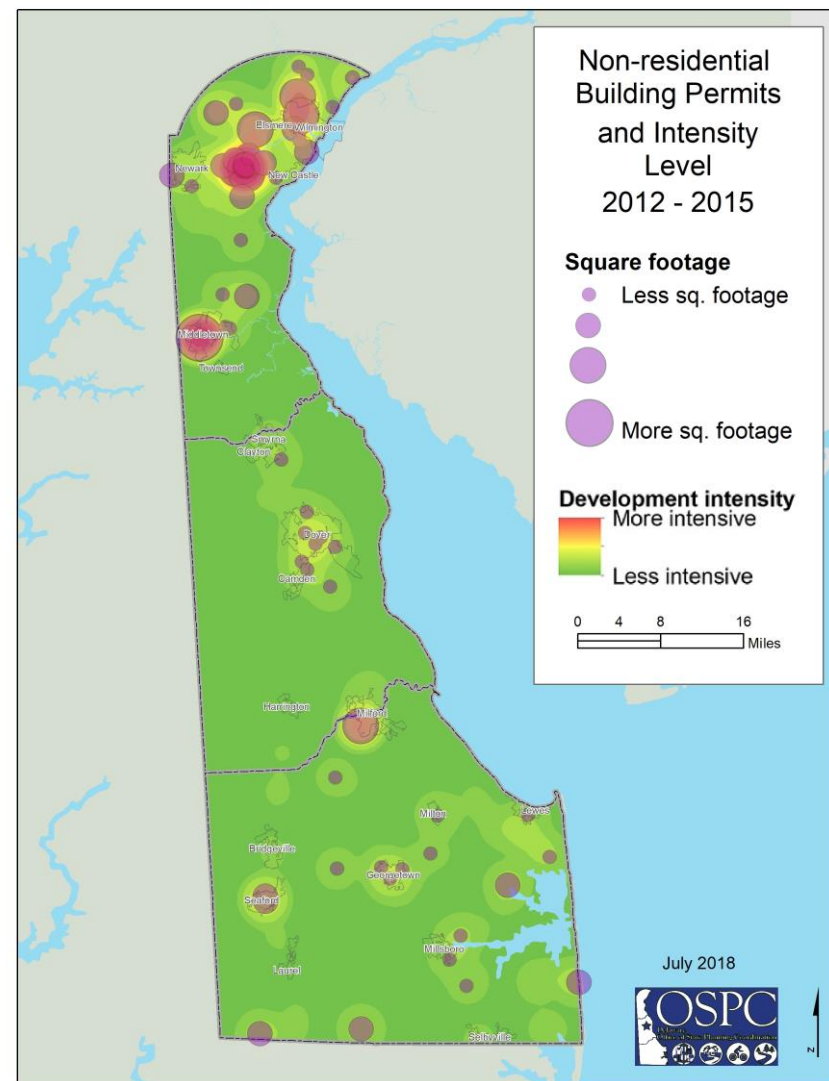
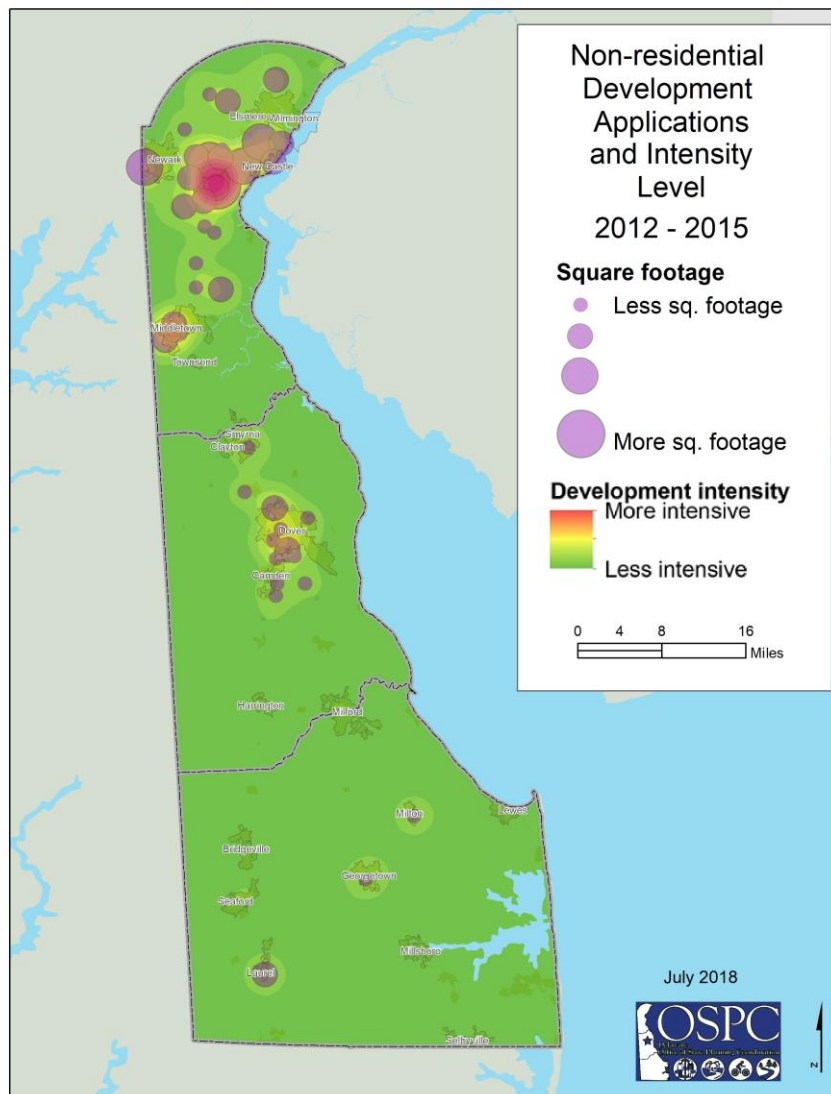
These maps illustrate the preponderance of non-residential development in New Castle County and the declines seen particularly in the southern counties in the periods after the recession. There has been some recovery in Kent and Sussex Counties, but levels remain lower than those seen before the economic downturn. The highly developed area of northern New Castle County has seen and continues to see the most non-residential development.

Difference maps between each 4-year period were produced for non-residential development to discern broader trends and determine “hotspots” (or conversely areas of “cooling”) across the state. Figure A.11 shows the increase (red tones) or decrease (blue tones) in development intensity between each of the four periods.

2018 REPORT ON STATE PLANNING ISSUES: APPENDIX A







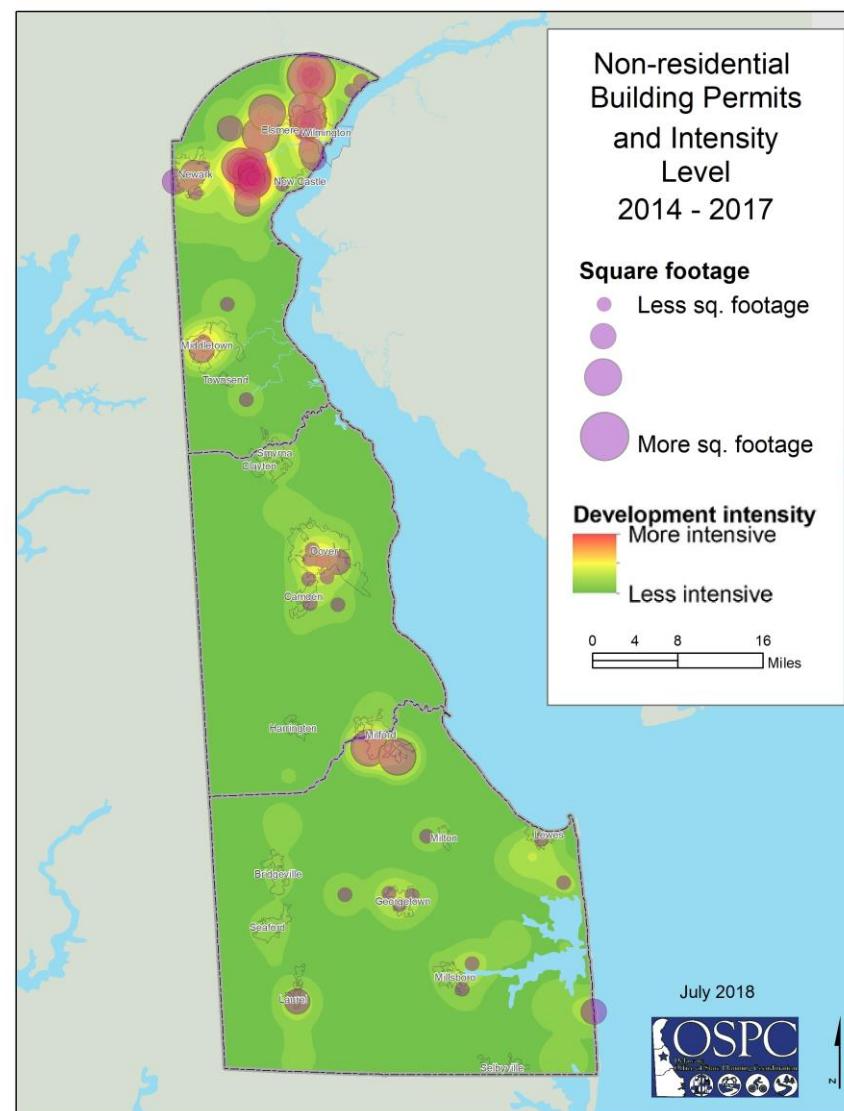
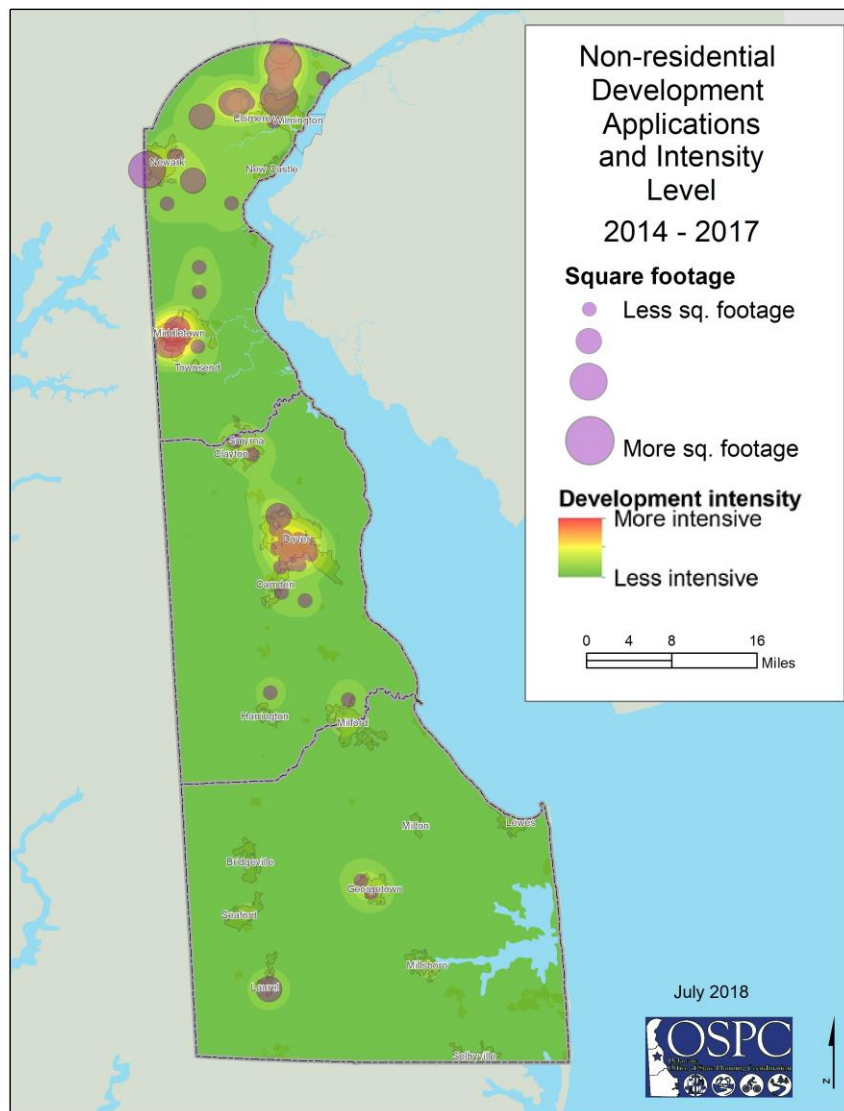
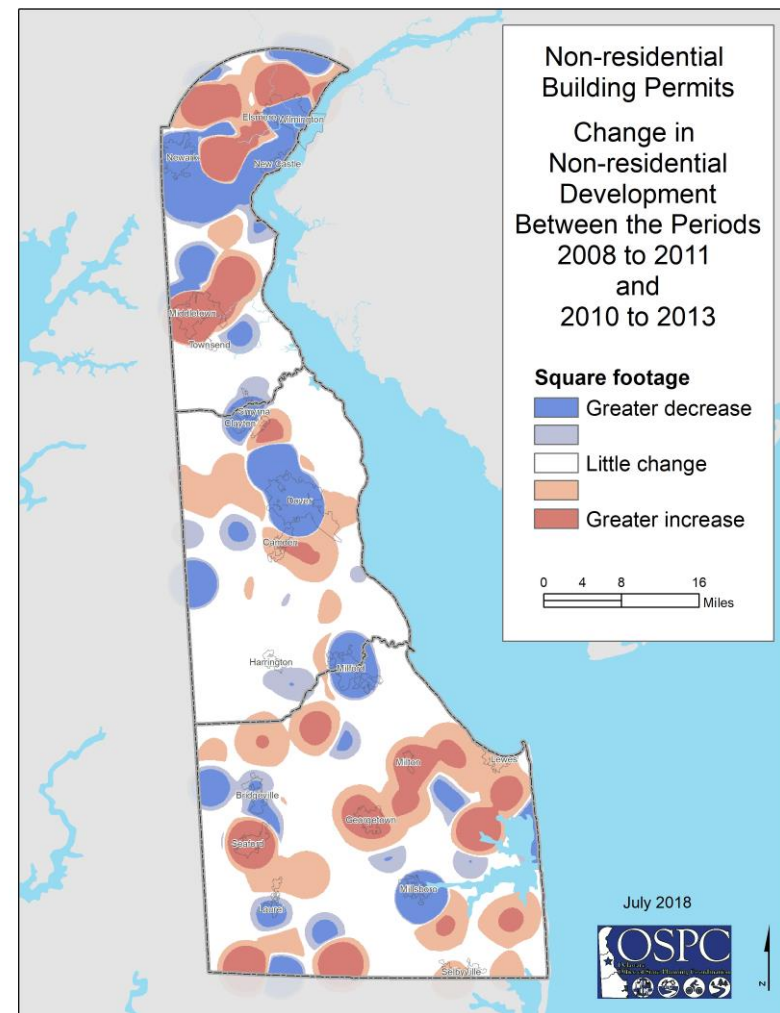
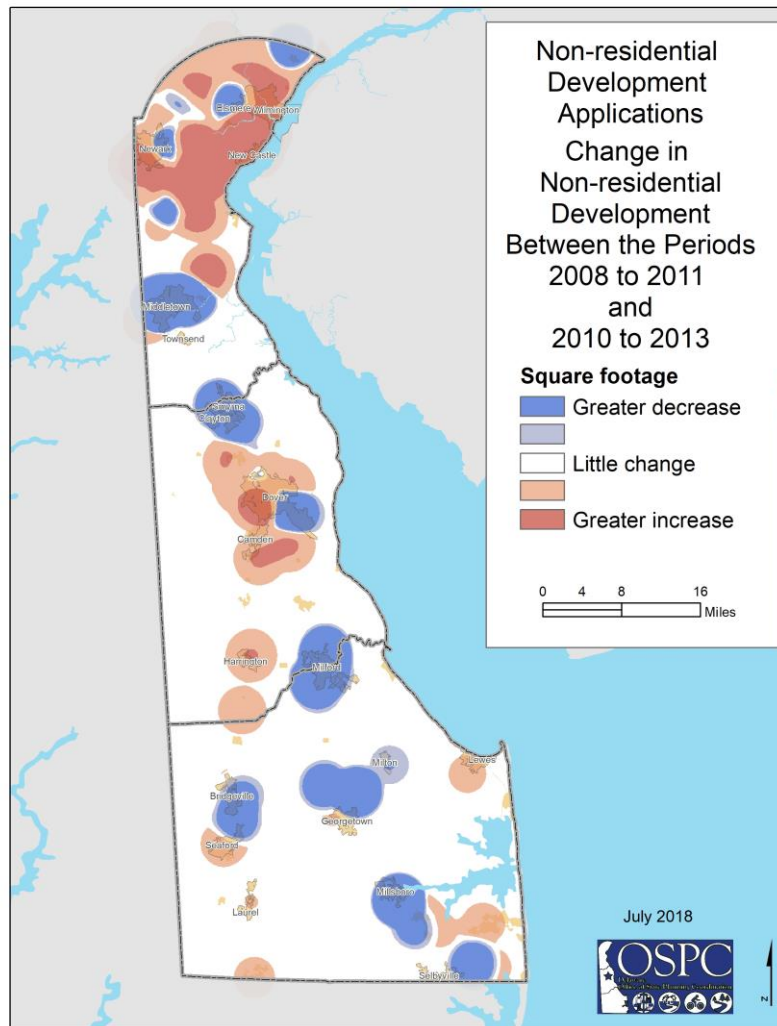
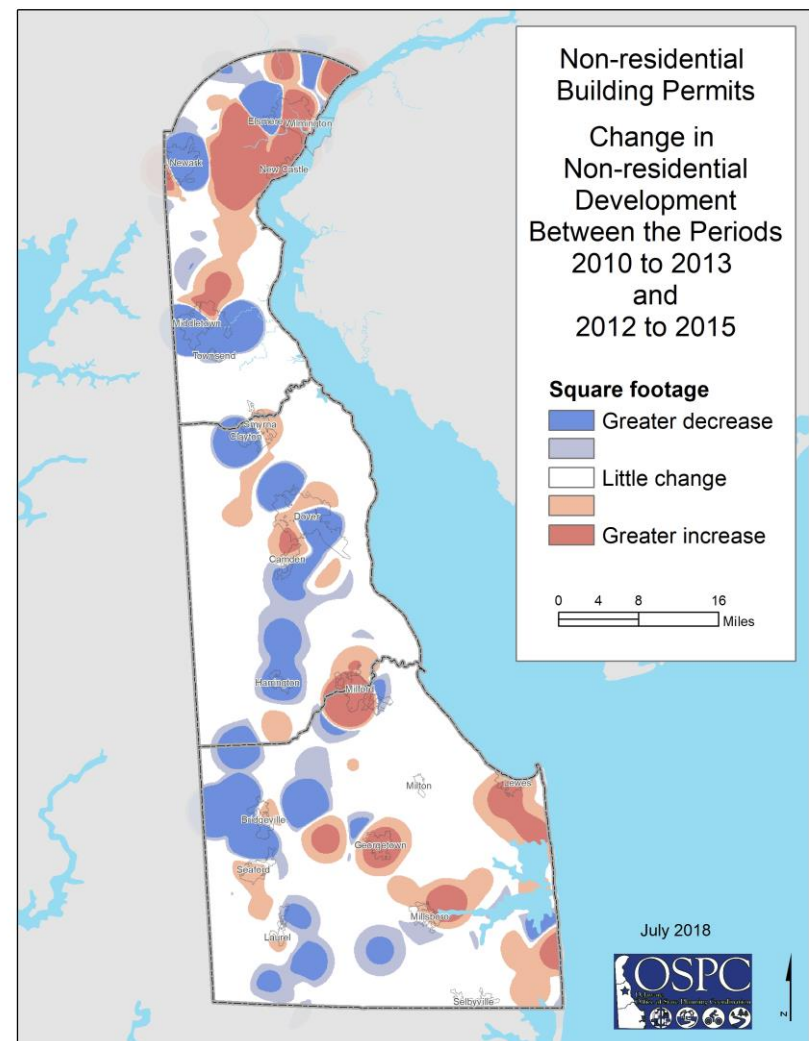
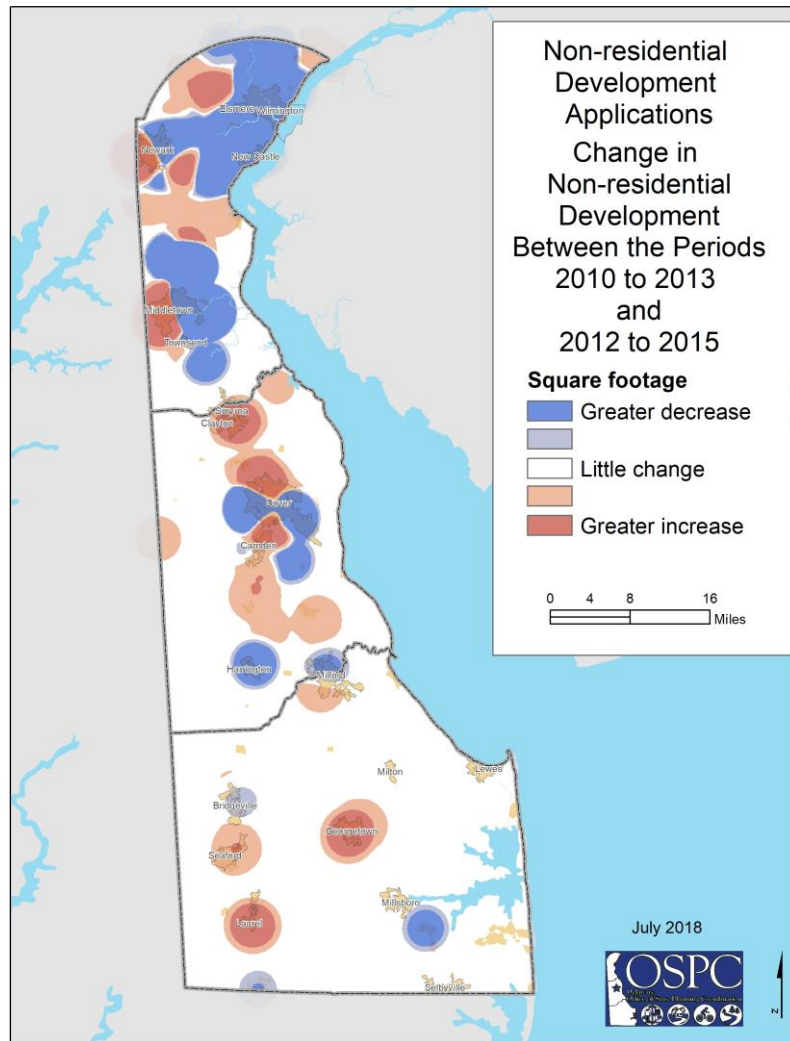
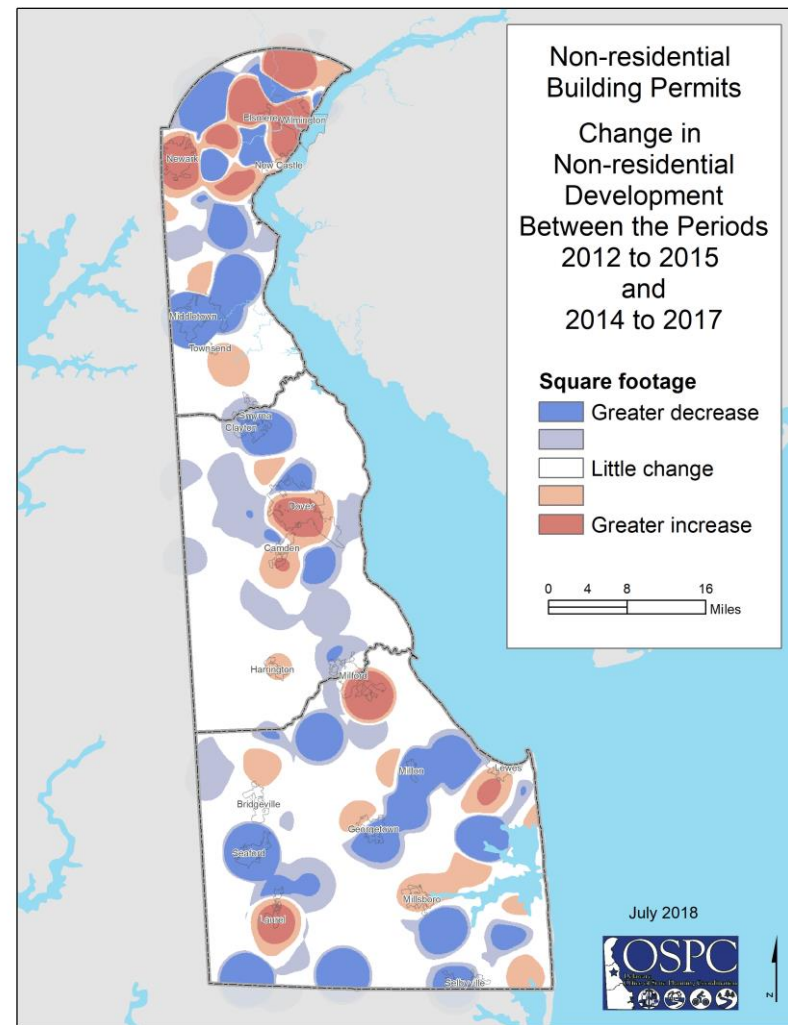
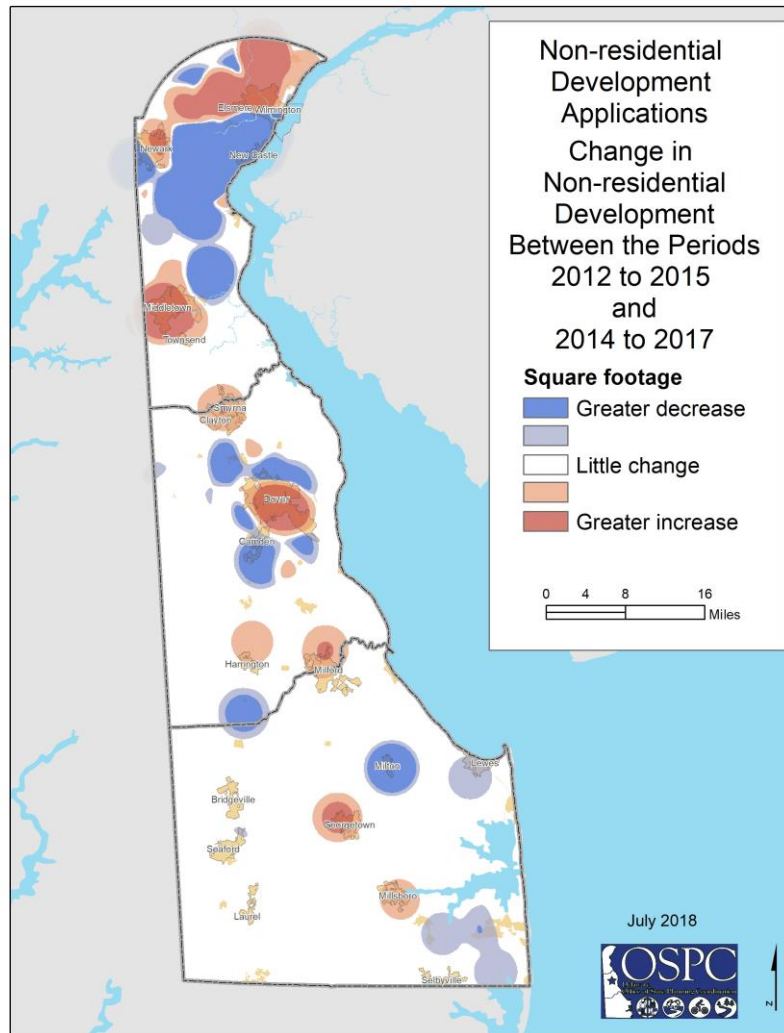


Figure A.11 – Change in Non-Residential Development Intensity Between Each Quadrennial Period (2008–2011, 2010–2013, 2012–2015, and 2014–2017)



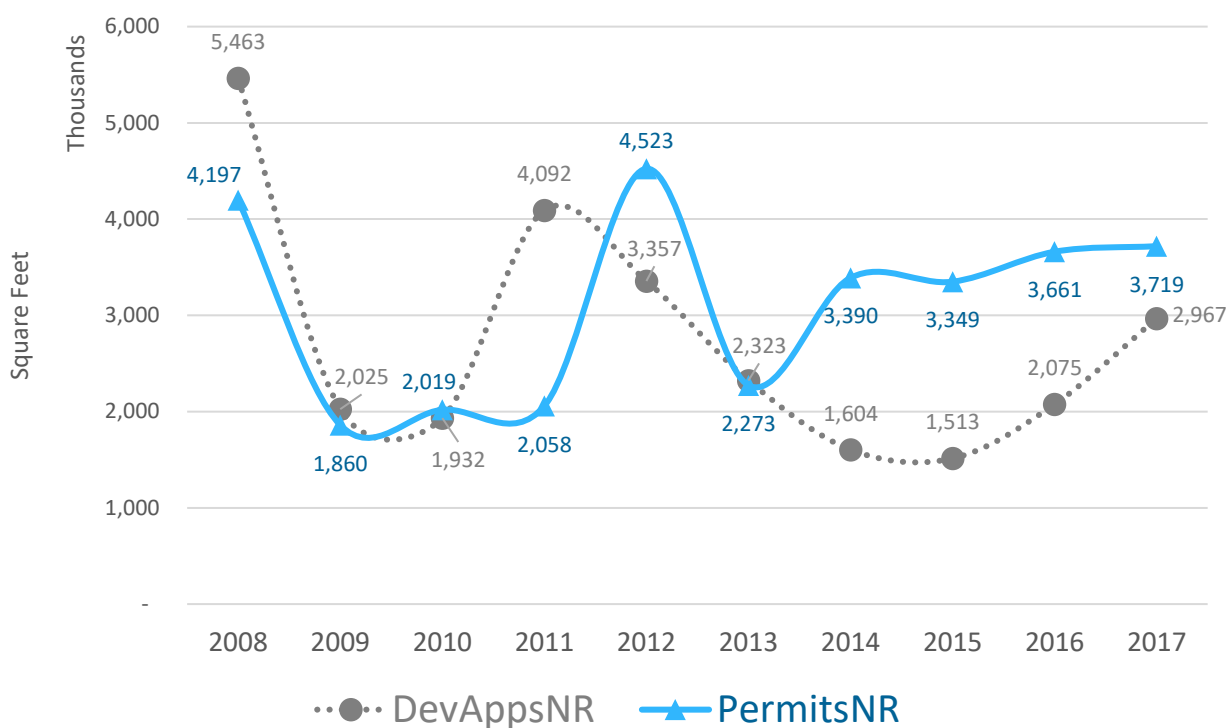




The first pair of maps above portray a mixed picture of development. In that period, building permits in particular showed some strength in New Castle County, around the greater Dover area, and at the beaches. In the second period this trend continued, as the building market continued its recovery. The third period was also mixed but shows a slightly “cooler” pattern, except in the perennially active greater-Wilmington area in New Castle County.

Figure A.12 presents the number of non-residential development applications along with building permits (measured in square footage) across the 10-year period of record.

Figure A.12 Trendlines of Square Footage in Non-Residential Development Applications (Gray Line) and Building Permits (Blue Line), 2008–2017



These trend lines show the steep drop-off in non-residential development application activity following 2008, and the variable trend in subsequent years, through 2017. Non-residential building activity rebounded strongly beginning in 2011–2012, as measured by development application and building permit data.

Following an initial spike as the state came out of a recessionary period, development applications went down in subsequent years, starting to rise again in 2015. Building permit data show a fairly steady increase in square footage after 2013, due mainly to trends in New Castle County. The increase in development applications in the period after 2015 may signal an increasing upward trend in the non-residential building market in future years, driven by the strong market in New Castle County. Statewide, the trends will likely be more mixed, as the southern two counties are likely to experience fairly flat growth in terms of non-residential development.

Concurrence with Growth Policies

The location of new development depends on many factors, including state infrastructure investments, county and municipal land-use plans, local development regulations, real estate market demands, lending practices, individual land developers, and consumer preferences. The 2015 *Strategies for State Policies and Spending*, published by the OSPC, sets forth priorities for growth as defined by state agencies.

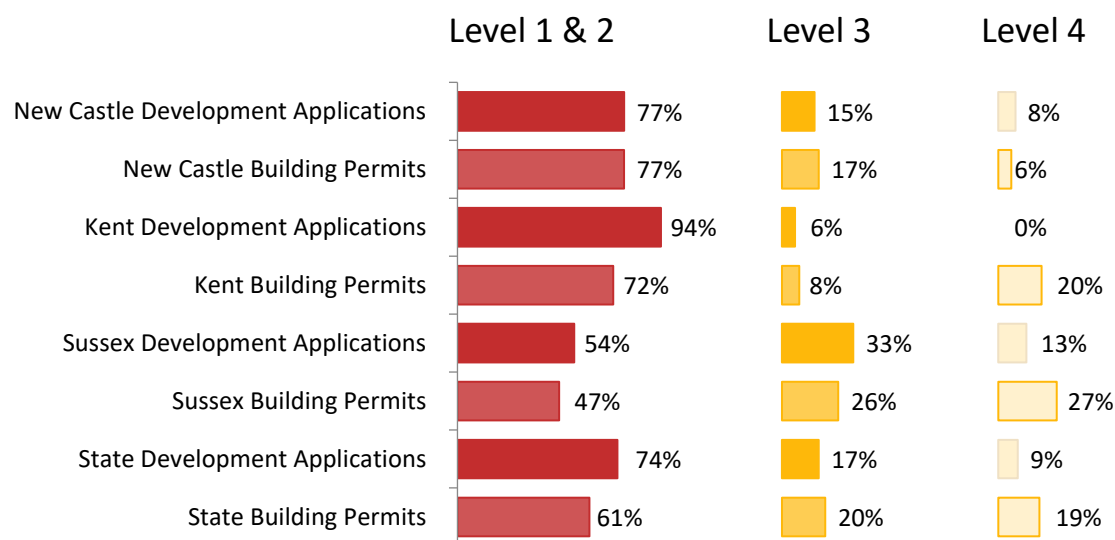
In this analysis, development activity is measured by the number of units and square footage of building reflected in development applications and building permits. The *State Strategies* is intended to affect this activity, encouraging growth in certain areas and discouraging it in others, based on priorities of various state agencies and reflecting local government comprehensive plans. The degree to which this occurs, and the trend in the proportion of growth in areas favorable or unfavorable to those state agencies, provides an indication of the efficacy of the *State Strategies* document itself.

The following sections examine the proportions over the last 6-year period (2012 through 2017) of development applications and building permits for residential and non-residential development. A higher proportion of development proposed in primary and secondary growth zones (Levels 1, 2, and 3, respectively), indicates concurrence of that development with the goals of the *State Strategies*. Relatively higher amounts of development proposed in Level 4 areas indicates that the *State Strategies* are not as effective in guiding growth.

Residential Development

Figure A.13 presents the proportion of residential development based on the number of units in development applications and building permits for the most recent 6-year period for which data have been compiled (2012 through 2017).

Figure A.13 Residential Development, Proportion by State Strategies Level, by County and Statewide, 2012–2017

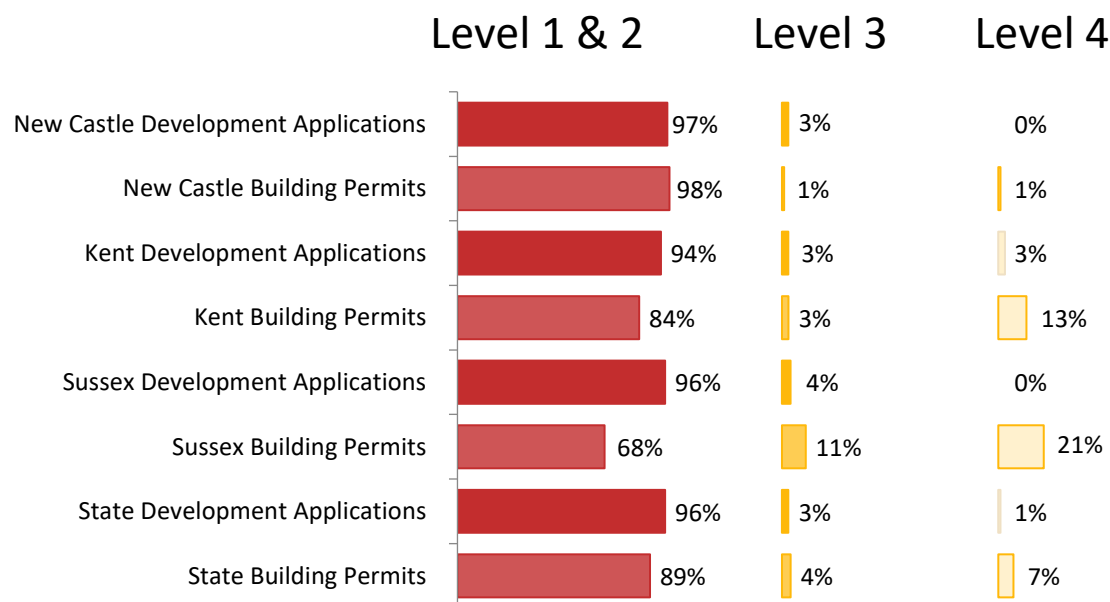


Across the period (2012 through 2017), the proportion of residential units in Levels 1 and 2 (i.e., growth) areas was high in New Castle and Kent Counties, with more development occurring outside the growth zones in Sussex County. Note that the proportion of units based on development applications in Levels 1 and 2 growth zones (77% in New Castle County, 94% in Kent County, and 54% in Sussex County) was higher than the proportion based on building permits in the same Levels 1 and 2 growth zones (77% in New Castle County, 72% in Kent County, and 47% in Sussex County). If the *State Strategies* were followed the proportion of building permits occurring in non-growth zones (i.e., Level 4) should be as low, or lower, than that reflected in development applications, as state policies serve to guide growth to appropriate locations.

Non-Residential Development

Figure A.14 presents the proportion of non-residential development, based on the square footage in development applications and building permits for the period 2012 through 2017.

Figure A.14 Non-Residential Development, Proportion by State Strategies Level, by County and Statewide, 2012–2017



Across the period (2012 through 2017), the proportion of non-residential square footage in Level 1 (i.e., growth) areas was high in all three Delaware counties. However, in both Kent and Sussex Counties the proportion of non-residential square footage in building permits issued was higher in secondary and non-growth zones than that reflected in development applications. While initial applications are highly focused in areas where the state encourages growth (97% in New Castle County, 94% in Kent County, and 96% in Sussex County), a lower proportion of building permits were issued in Levels 1 and 2 growth zones (98% in New Castle County, 84% in Kent County, and 68% in Sussex County).

Trends Summary

The following tables (Table A.14 and A.15) summarize the number and percentage of growth occurring in primary and secondary growth zones (*State Strategies* Levels 1, 2, and 3) based on development applications and building permits, respectively.

Table A.14 Summary of Development Application Activity by County and Investment Level, 2012–2017

County	Levels 1 & 2	Level 3	Level 4	% in growth zones	% outside growth zones
Residential Units					
New Castle County	6,458	1,293	651	92%	8%
Kent County	3,903	4	256	94%	6%
Sussex County	2,776	1,733	650	87%	13%
Non-Residential Square Footage					
New Castle County	10,123,795	265,632	-	100%	0%
Kent County	2,558,790	85,323	89,728	97%	3%
Sussex County	687,929	25,980	1,800	100%	0%

Based on development applications, residential growth in New Castle County focused largely in areas where it is encouraged (Levels 1, 2, and 3), with 92 percent of units targeted there. Kent County saw the highest percentage (94%) of residential units in growth zones, while Sussex County had the lowest rate of units in growth zones, at 87 percent.

With regard to non-residential development, there is a high degree of agreement with the *State Strategies*, with 100 percent, 97 percent, and 100 percent of total square footage in development applications occurring in growth zones in New Castle, Kent, and Sussex Counties, respectively.

Table A.15 summarizes the number of residential units and non-residential square footage represented in all building permits for the 6-year period from 2012 through 2017.

Table A.15 Summary of Building Permit Activity by County and Investment Level, 2012–2017

County	Levels 1 & 2	Level 3	Level 4	% in growth zones	% outside growth zones
Residential Units					
New Castle County	8,077	1,816	658	94%	6%
Kent County	4,322	494	1,158	81%	19%
Sussex County	7,220	4,043	4,100	73%	27%
Non-Residential Square Footage					
New Castle County	13,347,397	110,413	121,928	99.1%	0.9%
Kent County	1,804,483	56,493	286,390	87%	13%
Sussex County	3,548,800	557,540	1,081,943	79%	21%

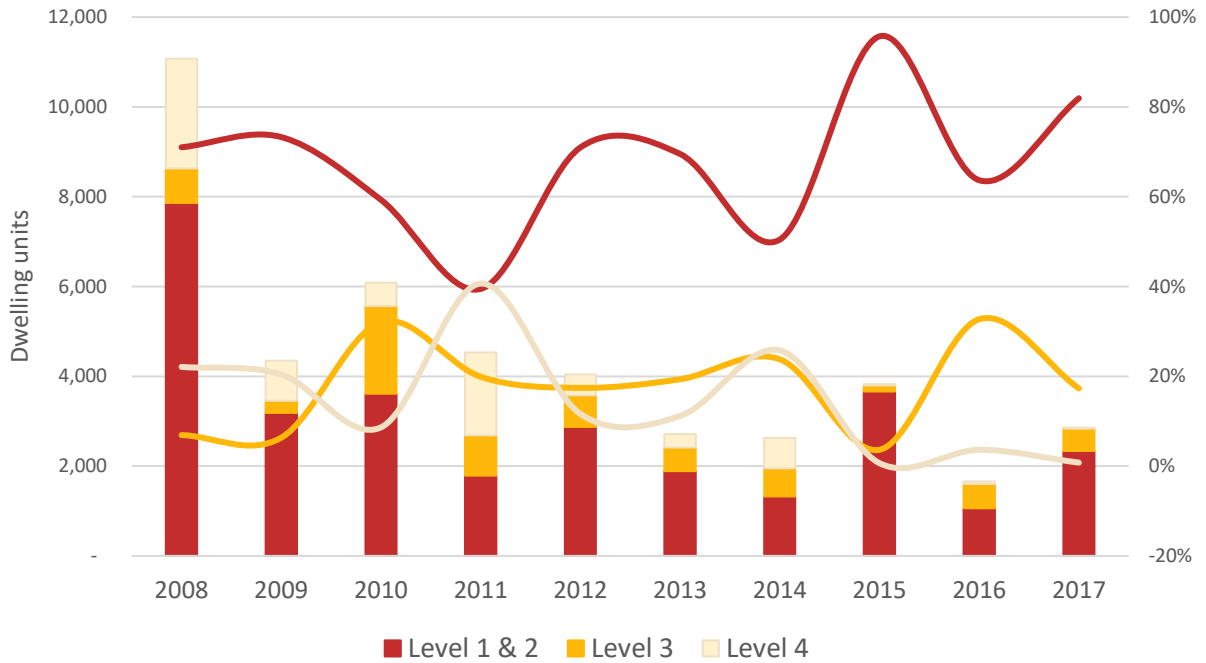
Based on residential building permits, New Castle County again had the highest percentage of growth (94%) focused in designated growth zones. Kent and Sussex Counties had somewhat lower proportions of residential units in growth zones, at 81% and 73%, respectively.

Nearly all non-residential square footage in New Castle County (99%) was targeted in growth zones based on building permit activity. In Kent County, a somewhat lower proportion of non-residential growth (87%) was directed at growth areas, while in Sussex County the proportion was 79 percent.

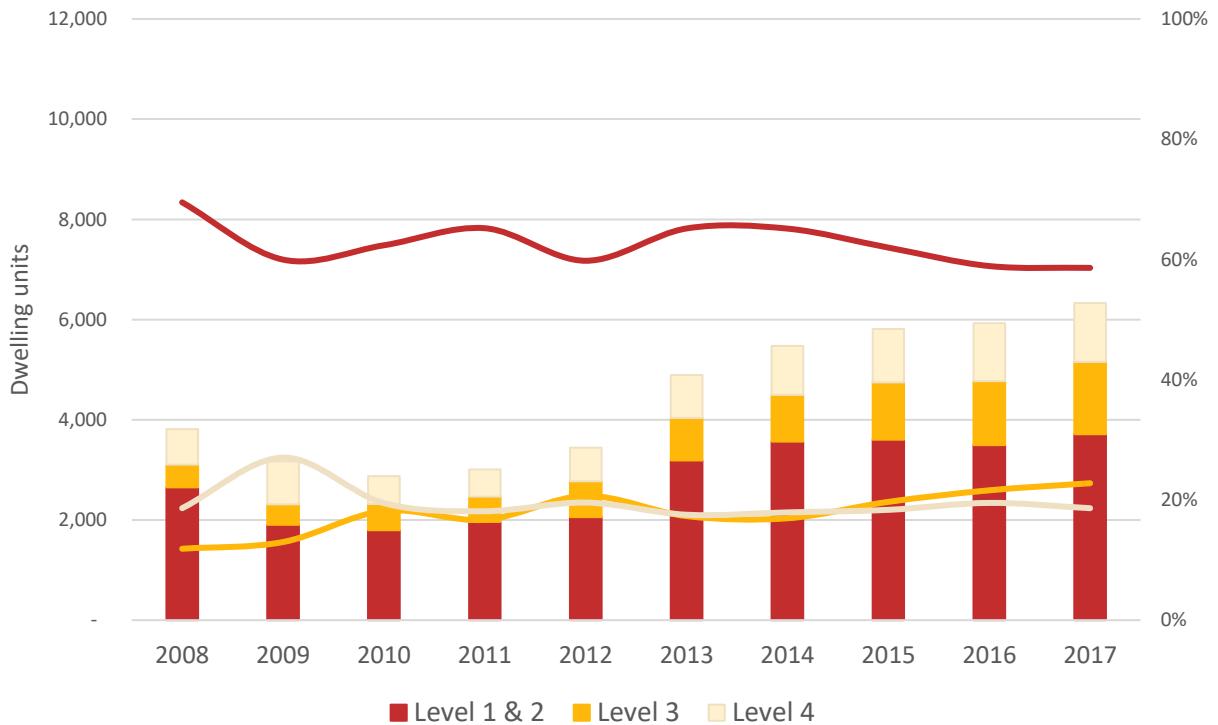
The following two figures show the statewide amount and percentage, by investment level, of both residential (Figure A.15) and non-residential (Figure A.16) development, as represented in development applications and building permits. The percentages are represented by the lines on the graphs, plotted against the vertical axis on the right side of each graph.

Figure A.16 Residential Housing Units (Number and Percentage) in Delaware, by State Strategies Investment Zones, 2008–2017

Development Applications



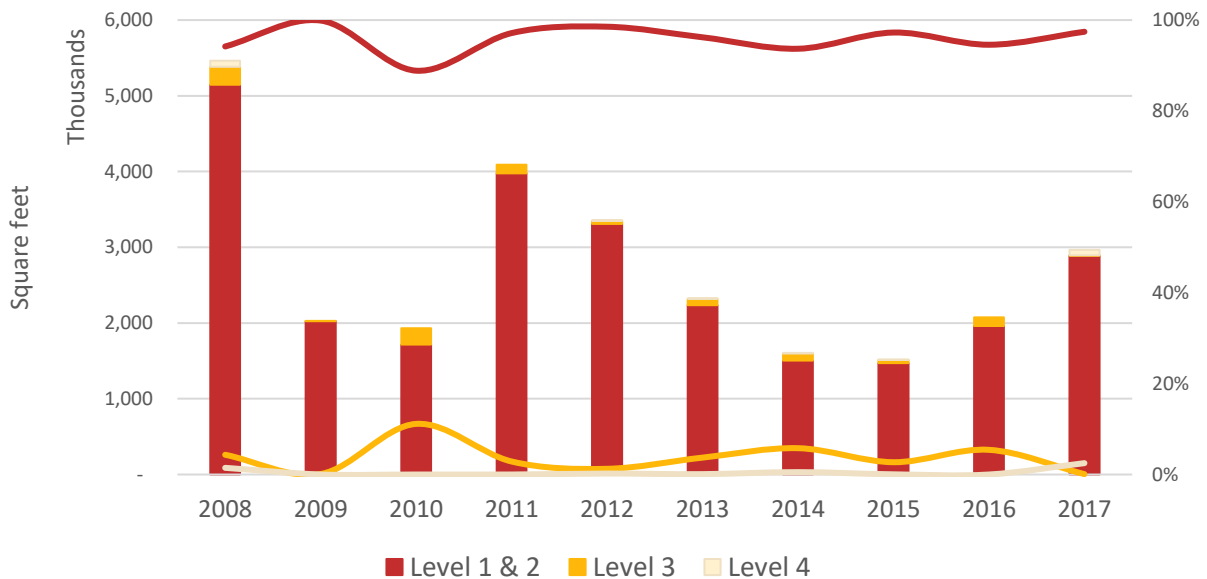
Building Permits



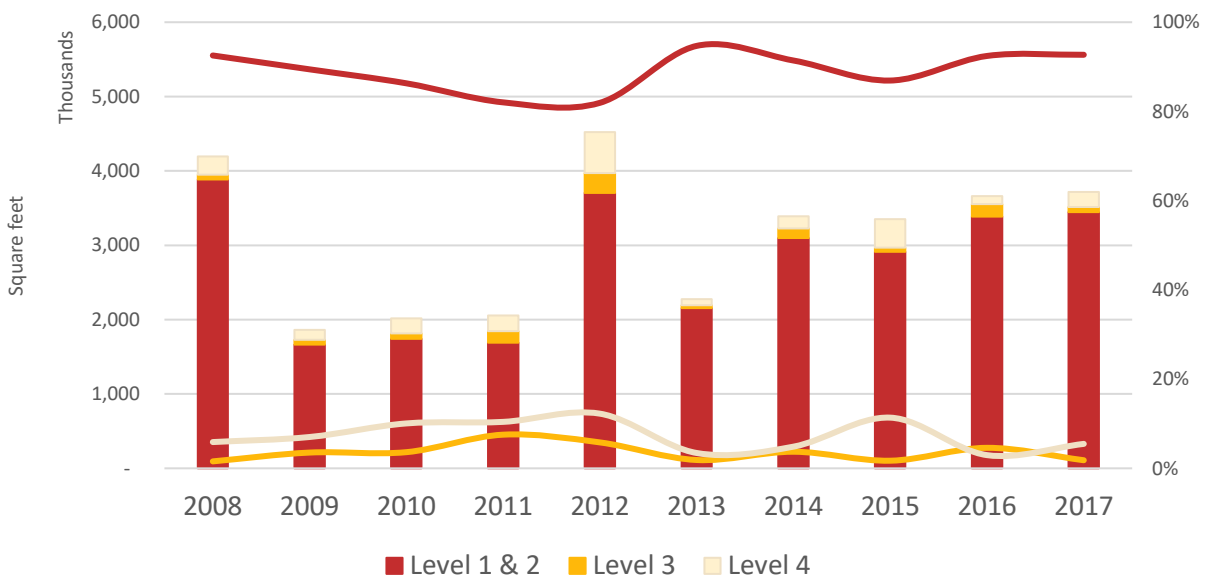
The degree of statewide concurrence between the *State Strategies* targeted growth zones and the proportion of development occurring in those zones was highly variable across the period (2008 to 2017) based on development applications, with a slight overall upward trend in concurrence (along with a drop in the number of housing units). Based on building permits, conversely, there was a steadier level of concurrence, but a slight downward trend in development within Levels 1 and 2.

Figure A.17 Non-Residential Square Footage in Delaware (Amount and Percentage), by State Strategies Investment Zones, 2008–2017

Development Applications



Building Permits



The degree of concurrence in Delaware between non-residential development and growth (i.e., Levels 1 and 2) zones based on development applications and building permits has been and remains relatively high, typically above 90 percent. There has been some variability across the period. The general trend is a higher concurrence earlier in the development process (at the development application stage) as compared with the later stage of building permit issuance.

Overview of Methodology

The OSPC and IPA conducted a spatial analysis in order to examine the location and extent of recently approved development across Delaware. Spatial analysis was performed using the ArcMap GIS software package produced by Esri. The best available spatial datasets were identified and used in order to perform the analysis and compare development activity relative to the 2015 *Strategies for State Policies and Spending* investment levels.

The OSPC obtain development application and building permit data from Delaware's municipalities and counties for each year from 2008 onward. These data form the basis for the spatial analysis. For each building permit or development application, the data included parcel identification, the number of residential units, and/or amount of non-residential square-footage associated with the permit or application. In some cases, street address or other locational information (e.g., subdivision name and crossroads) pertaining to the particular permit or application was included. All development data were structured and compiled into a single, consistent data set in Esri geodatabase format.

The results of this analysis should be used to gauge general trends in development activity across the state. The magnitude and direction of trends can be determined in this way, but precise levels of development should not be inferred from the analysis.

APPENDIX B: STATE FINANCIAL INVESTMENTS SUPPORTING RECENT TRENDS

In support of a growing population and changing demographics, the state government provides a variety of infrastructure and services. In accordance with the *Strategies for State Policies and Spending* and the Governor's land use agenda, Delaware has strategically invested state taxpayer dollars in important infrastructure and services. These funds help pay for public education, transportation, water and wastewater, public safety, agricultural and forest preservation, and housing. The following are some highlights showing fiscal trends and indicators from the past five fiscal years.

Education

In fiscal year (FY) 2018, the Delaware Department of Education's capital expenditures for public education equaled \$132.5 million, which included \$57.2 million for new construction and land acquisition (combined state and local funds). The remaining funds were used for maintenance and upgrades to existing school facilities. The operating budget for public education was \$1.42 billion in FY18, which represented approximately one third of Delaware's General Fund budget.

Table B.1 Public Education Trends and Indicators FY14–18

	FY14	FY15	FY16	FY17	FY18
Total Enrollment*	132,841	134,442	135,517	136,706	137,873
Charter School Enrollment	11,078	12,521	14,112	15,030	15,882
State Portion, Public Education Operating Budget (in thousands)	\$1,217,757.5	\$1,267,581.1	\$1,305,084.2	\$1,379,643.5	\$1,418,473.8
State Portion, Education Bond Bill	\$103,621,200	\$90,601,237	\$71,269,200	\$76,424,600	\$132,542,464
State Portion, New Construction and Land Acquisition**	\$55,542,500	\$19,983,900	\$7,835,100	\$8,028,200	\$57,261.863
New Schools Opened<<	0	1	0	0	1

Source: Delaware Office of Management and Budget; Delaware Department of Education

* Total enrollment includes charter school enrollment and does not include Dover Air Force Base.

** New Construction and Land Acquisition is a subset of the Education Bond Bill. The remaining portion of the Education Bond Bill funded other capital projects at school facilities.

<< New schools are public schools that involve the construction of a new building utilizing state capital funds. Building additions and charter schools are not included.

Enrollment in public schools continues to rise, having increased from 132,841 during the 2013–14 school year to 137,873 in the 2017–18 school year. These figures include students in charter schools, which receive operating funds but not capital funds from the state.

In order to address increasing enrollment and the need for modern, updated facilities, one new elementary school opened in the fall of 2017 in the Cape Henlopen School District. A new Sussex Consortium school is also under construction in the Cape Henlopen School District and is scheduled to open in the fall of 2019. Additional new school projects scheduled to begin include two new elementary schools in Cape Henlopen School District (replacing older buildings to be demolished); an elementary, middle, and high school in Appoquinimink School District, and a new elementary school in the Caesar Rodney School District. In order to maximize the benefits to the communities and leverage state and local school-district investments, these facilities are located in Levels 1, 2, or 3 of the *Strategies for State Policies and Spending*.

Infrastructure

Trails and Pathways

Since 2011, the State has had a renewed emphasis on the benefits of an integrated non-motorized pathway and recreational trail network to provide opportunities for pedestrians and bicyclists to travel safely and efficiently and to expand outdoor recreation opportunities while enjoying the natural, cultural, and historic assets of Delaware. It also recognizes the benefits of an integrated multi-modal transportation infrastructure in improving the economic and environmental sustainability of communities. Investing in trails and pathways will support the creation of jobs resulting in investments for bicycling and walking. It will also support construction and trail maintenance jobs. Investing in trails and pathways will create tourism opportunities, support tourism-related jobs, and support recreationally related goods and services. There is also a growing body of evidence that “active transportation” in the form of walking and cycling has significant health benefits. All of these benefits show how this infrastructure investment improves the quality of life for Delaware’s citizens.

Table B.2 Trails and Pathways Funding FY12–19, in millions

Agency	FY12	FY13	FY14	FY15	FY16	FY17	FY18	FY19	Total
DNREC	\$7	\$3	\$3	\$2.7	\$3	\$2.5	\$0	\$.2	\$21.4
DelDOT	\$0	\$10.3	\$.3	\$.8	\$3.4	\$5.4	\$.8	\$7.7	\$28.7
Total	\$7	\$13.3	\$3.3	\$3.5	\$6.4	\$7.9	\$.8	\$7.9	\$50.10

The following table details the projects that have been completed since 2011 and those that are currently under construction by the Delaware Department of Transportation (DelDOT) or the Delaware Department of Natural Resources and Environmental Control (DNREC). Numerous other projects are in the design and concept planning stages.

Table B.3 Trail Project Summary and Status

Name	Summary and Status
New Castle County	
New Castle Industrial Track, Phase III	Bridge crossing of the Christiana River and elevated boardwalk through the marsh to connect to DuPont Environmental Center and Wilmington River Walk. Work is scheduled to be completed by Mid-August 2018.
Tri-Valley Trail Phase I	A 1.8-mile paved trail connecting Thompson Station/Paper Mill Road intersection with Smith Mill/Paper Mill Road intersection. Construction underway. Work scheduled to be completed by September 2018.
Trail Re-surfacing, Route 72 from East Delaware Avenue to Dayett Mill Road	This project involves the re-surfacing of an existing trail network along Route 72 from East Delaware Avenue to Dayett Mill Road. Work is underway and scheduled to be completed by spring 2019.
Tri-Valley Trail Phase II	Project is being administered through the recreational trail program. The project is being advertised with construction expected to start fall 2018.
McCoy Road Pedestrian Bridge	Construction scheduled to start September 2018.
Kent County	
West Street Trail	Multi-use pathway to connect DART facility on Water Street to existing trail along North Street. Construction scheduled to begin in spring 2018.
Brecknock Park Trail	Multi-use pathway that extends trail along West Dover Connector to entrance of Brecknock Park. Construction scheduled for summer 2018.
US13 Sidewalk Improvements	Construction of sidewalk along US13 from Leipsic Road to Townsend Blvd. Construction scheduled for late summer 2018.
Senator Bikeway	Multi-use pathway along Route 8 from Saulsbury Road to West Street. Construction scheduled for summer 2018.
Capital City Trail, Gateway Shopping Center to South State Street	Extension of the Capital City Trail from shopping center to South State Street. Project design underway. Public workshop held with positive feedback. Construction scheduled for summer 2019.
Capital City Trail, South State Street to US13	Extension of the Capital City Trail from South State Street to US13. Project design underway. Construction scheduled for fall 2019.
Trail Re-Surfacing, North Street	This project involves the resurfacing of an existing trail along North Street in Dover from railroad tracks near Eden Hill to Schutte Park. Construction scheduled to be completed August 2018.
Trail Re-Surfacing, Saulsbury Road	This project involves the resurfacing of an existing trail along Saulsbury Road in Dover from Forest Avenue to College Road. Construction is scheduled to be completed September 2018.
Trail Re-Surfacing, Forest Avenue	This project involves the resurfacing of an existing trail along Forest Avenue from Saulsbury Road to a point west of Mifflin Road. Construction is scheduled to begin fall 2018.

Sussex County	
Georgetown to Lewes Trail Phase II	Extension of trail along rail line from Savannah Road to Minos Conaway Road. Construction scheduled for fall 2018.
Junction & Breakwater Trail, Rehoboth Extension	Multi-use pathway that connects trail at Hebron Road to Rehoboth Avenue near round-a-bout. Hebron Road trail extension scheduled for fall 2018. Protected cycle track along Rehoboth Avenue from draw bridge to Church Street on hold pending land sale decision.
Double Bridges Road Multi-Use Trail	Project idea on hold pending planning study completion.
Munchy Branch Road Multi-Use Trail	Survey of project area to be completed fall 2018.
Georgetown to Lewes Phase 8	Extension of trail connecting Georgetown to Lewes along decommissioned rail line. This section is from Little League facility in Georgetown to Park Avenue. Design scheduled to start September 2018.

Roads and Bridges

DelDOT is responsible for maintaining approximately 90 percent of all roads in Delaware compared with other states, which maintain about 20 percent of their roads. The state also is responsible for transit services. Responding to the demands of Delawareans for a safe, efficient transportation system is a challenge, especially in light of recent growth and development trends. In FY18, DelDOT made capital expenditures of over \$233.9 million in state funds to address Delaware's transportation needs. Total capital spending in FY18 was more than \$467.8 million, including federal funds.

Table B.4 demonstrates a number of trends that are relevant to transportation planning. After several years of decline, the number of registered motor vehicles and the vehicle miles travelled (VMT) in Delaware are both on the rise again and have been since FY12. Ridership of the Septa R2 rail line has increased slightly during the last fiscal year, but is still below ridership levels of 2014–16. The Dart fixed-route service ridership decreased for the sixth fiscal year in a row. Paratransit ridership also decreased this past fiscal year from last year's 953 thousand trips to 926 thousand trips.

Table B.4 Transportation Trends and Indicators FY14–18

	FY14	FY15	FY16	FY17	FY18
Licensed Drivers	672,744	681,165	750,601	721,561	786,504
Registered Motor Vehicles*	855,051	879,138	901,256	921,850	928,927
Vehicle Miles Traveled* (billions)	9.3	9.5	10.1	10.4	10.7
DART R2 Rail Ridership	1,225,507	1,273,590	1,240,830	1,128,094	1,160,079
DART Fixed Route Ridership (millions)	9.9	9.3	8.4	7.5	7.2
Paratransit Ridership	1,018,249	998,920	981,677	953,234	926,884
Transportation Trust Fund Revenues (thousands)	\$533,600	\$507,724	\$530,610	\$554,600	\$574,738 (unaudited)

	FY14	FY15	FY16	FY17	FY18
State Capital Expenditures (thousands)	\$170,970	\$135, 597	\$196,685**	\$217,435**	\$233,936**
Federal Capital Expenditures (thousands)	\$201,257	\$236,919	\$217,650	\$215,920	\$233,904
Total Capital Expenditures (thousands)	\$372,227	\$372,516	\$414,335**	\$433,355**	\$467,840

Source: Delaware Office of Management and Budget; Delaware Department of Transportation

* Data for calendar year (CY18 is projected)

**Without US 301 (State Capital Expenditures with US 301 equal \$350,551, for a total of \$584,487)

Water and Wastewater

While the operation of drinking water and wastewater systems has traditionally been the domain of Delaware's local governments, the state Department of Health and Social Services (DHSS) and DNREC do provide significant funding to allow for the improvement and expansion of these systems. Table B.5 lists recent state and federal expenditures on water and wastewater projects through the Water Pollution Control Funds, which are programs that are administered by DNREC to provide support for community water and wastewater service projects. In FY18 a total of \$65.9 million of state and federal funds were used, which is by far the largest amount in the past five fiscal years. The State has also provided assistance for wastewater projects through a 21st Century Fund Wastewater Management Account.

Table B.5 Water and Wastewater Funding to Local Governments FY14–18

	FY14	FY15	FY16	FY17	FY18
Projects Funded	2	2, +1 increase	9	9	4, +1 supplemental increase
Water Pollution Control Funds (State)	\$137,500	\$1,283,892	\$4,156,183	\$2,650,003	\$10,997,507
Water Pollution Control Funds (Federal)	\$687,500	\$6,419,458	\$20,780,914	\$13,250,017	\$54,974,341
Water Pollution Control Funds (Total)	\$825,000	\$7,703,350	\$24,937,097	\$15,900,020	\$65,971,848
21st Century Wastewater Fund*	\$0	\$1,468,000	\$1,593,560	\$621,650	\$235,063

Source: DNREC Financial Assistance Branch

* State Funds

Public Safety

Paramedic Program

The State currently provides 24 percent of the funding that the counties use to provide their jurisdictions with paramedic service. This percentage was decreased from 30 percent in the most recent budget process. In FY17, the State (at 30%) funded county paramedic operations with \$10.8 million of state funding. In the first three quarters of FY18, the state provided \$6.7 million in funding to the

counties to support the paramedic program. The fourth quarter spending for this program was not available at the time of publication, so the actual total will be higher in FY18.

Table B.6 State Paramedic Program Funding FY14–18

	FY14	FY15	FY16	FY17	FY18*
State Portion	30%	30%	30%	30%	24%
New Castle	\$5,227,658	\$4,795,792	\$5,191,588	\$5,211,418	\$3,032,000
Kent	\$1,432,155	\$1,465,162	\$1,515,794	\$1,425,949	\$1,425,949
Sussex	\$4,193,621	\$4,174,649	\$4,051,517	\$4,172,763	\$4,172,763
Total	\$10,853,434	\$10,435,603	\$10,758,899	\$10,810,131	\$6,745,115

Source: Delaware Office of Management and Budget

* FY18 reflects three quarters only. Final expenditures were not available at time of publication.

** The totals for FY13–FY15 have been revised by OMB and DHSS to ensure consistency in the data reported.

State Police

The Delaware State Police provides statewide public safety services. The agency assists all local and county police agencies with specialized police and investigative services. The agency has the primary responsibility for enforcing traffic laws on Delaware’s major roadways. In addition, the Delaware State Police is the agency responsible for providing police protection for residents of unincorporated Kent and Sussex Counties, as well as for small towns that lack municipal police departments. Due to population growth in the unincorporated areas (and small towns) in both counties, the Delaware State Police have primary responsibility for protecting approximately 58 percent of the population in Kent County and 79 percent of the population in Sussex County (as per 2010 Census 100 percent population count data).

Sussex County and the State share the cost of providing additional troopers to patrol in that county. In FY17, the State and Sussex County shared the cost of 44 troopers at a cost of \$2 million to Sussex and \$2.8 million to the State. As a part of Governor Carney’s budget reset, the terms of this cost sharing arrangement were revised for the FY18 budget to more accurately reflect the true cost of salaries and other expenses. Sussex County assumed approximately \$700,000 more as their share of the cost for these troopers in the past fiscal year (FY18).

From FY14 through FY18, the funding necessary to support the State Police has steadily increased from \$110.5 million in FY14 to \$115.7 million in FY17. In addition, the number of personnel employed to meet Delaware’s public safety needs has increased from 960 in FY14 to 963 in FY18 (total employees include both troopers and related support staff).

In FY12 through FY14, funds were appropriated for the purpose of replacing the Delaware State Police Troop 7 facility in Lewes, as the facility is overcrowded and has significant maintenance and renovation needs. Funding to support a study, land acquisition, and design have been appropriated. Land acquisition for the new Troop 7 facility was completed in May of 2015, design was completed in FY17, and construction is anticipated to begin in FY19. The total cost of this project will be at least \$20,050,000.

Table B.7 State Police Personnel and Budget FY14–18

	FY14	FY15	FY16	FY17	FY18
Total Employees*	960	961	960	965	963
Budget (thousands)	\$110,557.6	\$112,289.6	\$111,505.1	\$114,757.6	\$115,662.3

Source: Delaware Office of Management and Budget

* Includes both troopers and civilian staff

** State Police budget reported is General Fund only and excludes the Closed State Police Pension Plan. All fiscal years have been adjusted downward to exclude the Closed State Police Pension Plan.

Agriculture

Farmland Preservation

Delaware has one of the best-regarded and most productive farmland preservation programs in the nation. Administered by the Department of Agriculture, farmers and other landowners sell easements to their land to the state, which essentially extinguishes their right to develop the land, but continues to allow a wide range of agricultural uses. In the past five fiscal years, the program has preserved 147 farms, totaling over 14,300 acres. This has been accomplished using a combination of federal, state, and local funds.

The Aglands Preservation Foundation chooses farms to preserve based on the percentage discount that the owners offer from the appraised value of their farms' development rights. For example, if a farm's development rights value is worth \$1,000,000 and the owner is willing to sell those rights for \$400,000, this is a 60 percent discount (donation). The farms with the highest percentage discounts are preserved. Over the 21-year history of the Aglands Preservation Program, landowners have discounted (donated) on average 56 percent of their farms' development rights value.

In FY18, the program selected 41 farms to preserve comprising over 3,500 acres; these easements will settle during FY18. The cost per acre of farmland easement has decreased significantly, from a peak of \$6,624 per acre in FY07 to \$1,220 per acre in FY16, but rose slightly to \$1,385 in FY18. The easement value is partially based on the appraised market value of the land for "highest and best use," which is usually housing development. This overall decrease can be attributed to the reduced demand for new housing and land-development projects in rural areas; however, the recent improvement in the housing market is reflected in the higher easement values for FY17 and FY18.

The Department of Agriculture continues to seek additional funding sources for the program. In FY14, the program received nearly \$520,000 from Ducks Unlimited to help purchase easements on farms that contain forested wetlands; these funds helped to purchase five easements between FY14 and FY16. In FY17, the Department of Agriculture successfully reached agreement with the USDA Natural Resources Conservation Service (NRCS) to utilize federal Agricultural Conservation Easement Program (ACEP) funding to help preserve easements. Delaware utilized over \$49 million of NRCS funds prior to FY15, but did not utilize ACEP funds in FY15 and FY16 due to new federal regulations that were not compatible

with the state's program. The addition of these federal funds will enable Delaware to preserve more farms. Similarly, Delaware is now eligible to utilize U.S. Department of Defense Readiness and Environmental Protection Integration (REPI) funds from the Patuxent River Naval Air Station for easements in southwestern Sussex County. These federal funds are used to protect lands around military installations and within their testing areas and flight paths.

Table B.8 Farmland Preservation by Easement FY14–18

	FY14	FY15	FY16	FY17***	FY18****
Farms Preserved	43	13	16	34	41
Acres Preserved	4,460	1,071	2,220	3,039	3,526
State Funds	\$4,145,416	\$1,263,661	\$2,226,763	\$2,461,807	\$2,775,738
Federal Funds	\$4,133,727	\$0	\$0	\$1,422,312	\$1,432,334
County/Other Funds	\$230,781	\$146,432	\$500,470	\$295,622	\$673,952
Legal and Survey*	\$174,784	\$41,264	\$67,973	\$162,599	\$190,000
Total Funds	\$8,684,708	\$1,451,357	\$2,727,233	\$4,342,340	\$5,072,024
Cost per Acre**	\$1,907	\$1,936	\$1,220	\$1,375	\$1,385

Source: Delaware Department of Agriculture

* State Funds

** Cost per acre paid to land owner excludes legal and survey costs.

*** FY17 totals are estimates because not all settlements have occurred as of publication.

**** FY18 totals are estimates because no settlements have occurred as of publication.

Young Farmers Loan Program

The Young Farmers Loan Program was established in FY12 by the Department of Agriculture to help individuals acquire farmland. Applicants who meet the criteria for the program (age 18 to 40, net worth not exceeding \$300,000, and at least 3 years of farming experience) can apply for a loan to help purchase a farm (the property must have at least 15 acres of cropland). If approved, an applicant can receive a 30-year, no interest loan for up to 70 percent (not to exceed \$500,000) of the appraised value of the property's development rights. The applicant has to secure the funding for the remainder of the purchase price through a private lender (bank, Farm Credit, etc.). The loan with the private lender is their primary loan and is paid first. Once their primary loan is paid, then the applicant pays the Young Farmer loan up to a maximum of 30 years. For example, if their private loan is 20 years, then they have 10 years to pay the Young Farmer loan. The property is placed into a permanent conservation easement at settlement, and the applicant must actively farm the property for the life of the Young Farmer loan.

In FY18, one loan totaling \$325,000 was approved to help purchase a farm tallying 120 acres.

Table B.9 Young Farmer's Program FY14–FY18

	FY14	FY15	FY16	FY17	FY18***
Farms Preserved	3	Not Funded	3	5	1
Acres Preserved	164	\$0	147	249	120
State Funds	\$448,584	\$0	\$471,882	\$889,330	\$325,000
Legal and Survey*	\$18,532	\$0	\$17,300	\$28,442	\$6,500
Total Funds	\$467,116	\$0	\$489,182	\$917,772	\$331,500
Cost per Acre**	\$2,623	\$0	\$3,210	\$3,686	\$2,708

Source: Delaware Department of Agriculture

* State Funds

** Cost per acre paid to landowner excludes legal and survey costs

*** FY18 totals are estimates because this loan has not settled as of publication.

Forestland Preservation

The Forest Preservation Program was initiated in FY10 by the Department of Agriculture. In that year, there were nine forest tracts preserved totaling 872 acres. The funding for these easements included state funding combined with funding from The Nature Conservancy, a private conservation organization. Although the program is still in place, it has been inactive since FY10; however, two easements were donated during FY17.

Table B.10 Total Forest Preservation Easements

Forest Tracts Preserved	11
Acres Preserved	928
State Funds	\$1,038,400
Federal Funds	N/A
Local Funds	N/A
Private Conservation Funds	\$412,403
Legal & Survey*	\$49,428
Total Funds	\$1,500,231

Source: Delaware Department of Agriculture

* State Funds

Environment

Community Water Quality Improvement Grant

The purpose of the Community Water Quality Improvement Grant Program is to provide a source of financing to enhance water quality in an environmentally sound and cost-effective manner. These funds allow homeowner associations, municipalities, government agencies, nonprofit organizations, and

estuary programs to obtain financing for the implementation of nonpoint source initiatives to improve water resources throughout the state.

Table B.11 Community Water Quality Improvement Grants FY14–FY18

State Funds	FY14	FY15	FY16	FY17	FY18
DNREC	\$500,000	\$500,000	\$350,000	\$350,000	\$250,000

Source: DNREC Division of Watershed Stewardship, based on the annual allocation of funds for multi-year projects

Nonpoint Source Program

Nonpoint source (NPS) pollution, unlike pollution from industrial and sewage treatment plants, comes from many diffused sources. NPS pollution is caused by rainfall or snowmelt moving over and through the ground. As the runoff moves, it picks up and carries away natural and human-made pollutants, finally depositing them into lakes, rivers, wetlands, coastal waters, and even our underground sources of drinking water.

Table B.12 NPS Grant Funding for FY14–FY18

	FY14	FY15	FY16	FY17	FY18
State	\$775,823	\$746,138	\$773,138	\$843,709	\$783,115
Federal	\$1,158,523	\$1,144,706	\$1,154,706	\$1,265,500	\$1,174,612
Total	\$1,934,346	\$1,907,844	\$1,927,844	\$2,109,209	\$1,957,727

Source: DNREC Division of Watershed Stewardship, based on the annual allocation of funds for multi-year projects

The Delaware NPS Program addresses NPS pollution through educational programs, publications, and partnerships with other Delaware organizations. The Delaware NPS Program also administers a competitive grant made possible through Section 319 of the Clean Water Act, providing funding for projects designed to reduce NPS pollution.

Housing

HOMEOWNERSHIP

DSHA continues to provide access to low rate and settlement assistance through various programs to help advance and sustain homeownership. In FY18, DSHA helped 963 homebuyers with more than \$221 million in financing of first, second, and acquisition/rehabilitation loans. DSHA also continued to preserve homeownership through the rehabilitation of 335 homes to ensure they are safe and habitable.

Building on efforts to promote responsible homeownership, DSHA partners with \$tand by Me to provide financial coaching to Delawareans who want to be homeowners but need help to reduce debt, improve their credit scores, and achieve financial stability.

As Delaware’s economy improves, DSHA continues to provide resources to help reduce the impact of mortgage delinquencies through “Delaware Homeowner Relief.” This umbrella program, created by

DSHA and the Department of Justice, supports housing counseling, education and outreach, foreclosure mediation, mortgage fraud investigation and prosecution, emergency mortgage assistance, and servicer events. Through this collaboration, DSHA provided foreclosure prevention and mitigation assistance to 713 families last year.

Table B.13 DSHA Homeownership Programs FY14–18

	FY14	FY15	FY16	FY17	FY18
Homebuyers Assisted	653	617	975	806	963
Mortgage Assistance* (millions)	\$86	\$124	\$240	\$196	\$221
Homeownership Rehabilitation	393	319	402	223	335
Foreclosure Assistance: Loans, Grants, Counseling	1,242	825	733	1,192	713

Source: Delaware State Housing Authority

* Below-market rate mortgages, down payment, and settlement assistance.

Affordable Rental

As rental demand continues to strengthen, Delaware renters increasingly stretch their budgets to pay rent and utilities. DSHA works diligently to ensure that those most in need have access to safe, affordable and accessible housing through DSHA’s Public Housing units and Housing Choice Vouchers, as well as through new rental units created through the Low-Income Housing Tax Credit Program and the Housing Development Fund. In FY18, 1,405 low-income households were provided with Public Housing Units or Housing Choice Vouchers. Additionally, 230 affordable rental units were created new or preserved from conversion or demolition.

DSHA continues to expand the reach of the State Rental Assistance Program (SRAP). This program was created in partnership with DHSS and the Department of Services for Children, Youth and their Families to help Delawareans who require supportive services live independently in their communities. In FY18, DSHA continued its partnership with the Christiana, Capital, and Seaford School Districts in the HomeWorks program to provide rental assistance vouchers to help families facing homelessness to return to stable housing so their children can focus on school work. Altogether in FY18, 843 households received help through the SRAP program.

Table B.14 DSHA Rental Programs FY14–18

	FY14	FY15	FY16	FY17	FY18
Rental Units Produced or Preserved	60**	386	535	345	230
Housing Development Fund > (millions)	\$10	\$10	\$10	\$10	\$10
DSHA Public Housing & Housing Choice Vouchers Managed	1,413	1,413	1,412	1,400	1,405
Rental Assistance for Special Populations	477	731	785	749	843

** DSHA’s method for tracking funding for rental housing projects changed in FY14. Actual activity did not decrease, but is being counted differently. Reported units rebounded in FY15.

> HDF base allocation and Affordable Rental Housing Program (ARHP). Does not include HDF allocated for specific programs.

Community Revitalization

Quality affordable housing is crucial to the growth and vitality of any community. However, housing investments alone are often not enough to build and sustain strong communities. For urban areas that especially benefit from broader community interventions, the Downtown Development Districts program has been spurring investment in Delaware’s downtowns, stimulating job growth, and improving the commercial vitality of our towns and cities. In FY18, almost \$7.75 million in grant funds leveraged \$112 million in private investment to support 50 projects in the eight designated districts. To continue this revitalization, DSHA is combining Downtown Development District investments with community interventions through the Strong Neighborhoods Housing Fund (SNHF) to help redevelop vacant and blighted lots that can have a negative impact on an entire community. SNHF has received two allocations of one-time settlement funds to address vacant and abandoned properties as part of targeted community revitalization plans addressing blight and crime. In FY19, another \$3 million SNHF will be available. DSHA looks forward to continuing to collaborate with public and private partners to support increased economic vitality and quality of life in the heart of Delaware’s communities.

Table B.15 DSHA Downtown Development District Grant program FY15–18

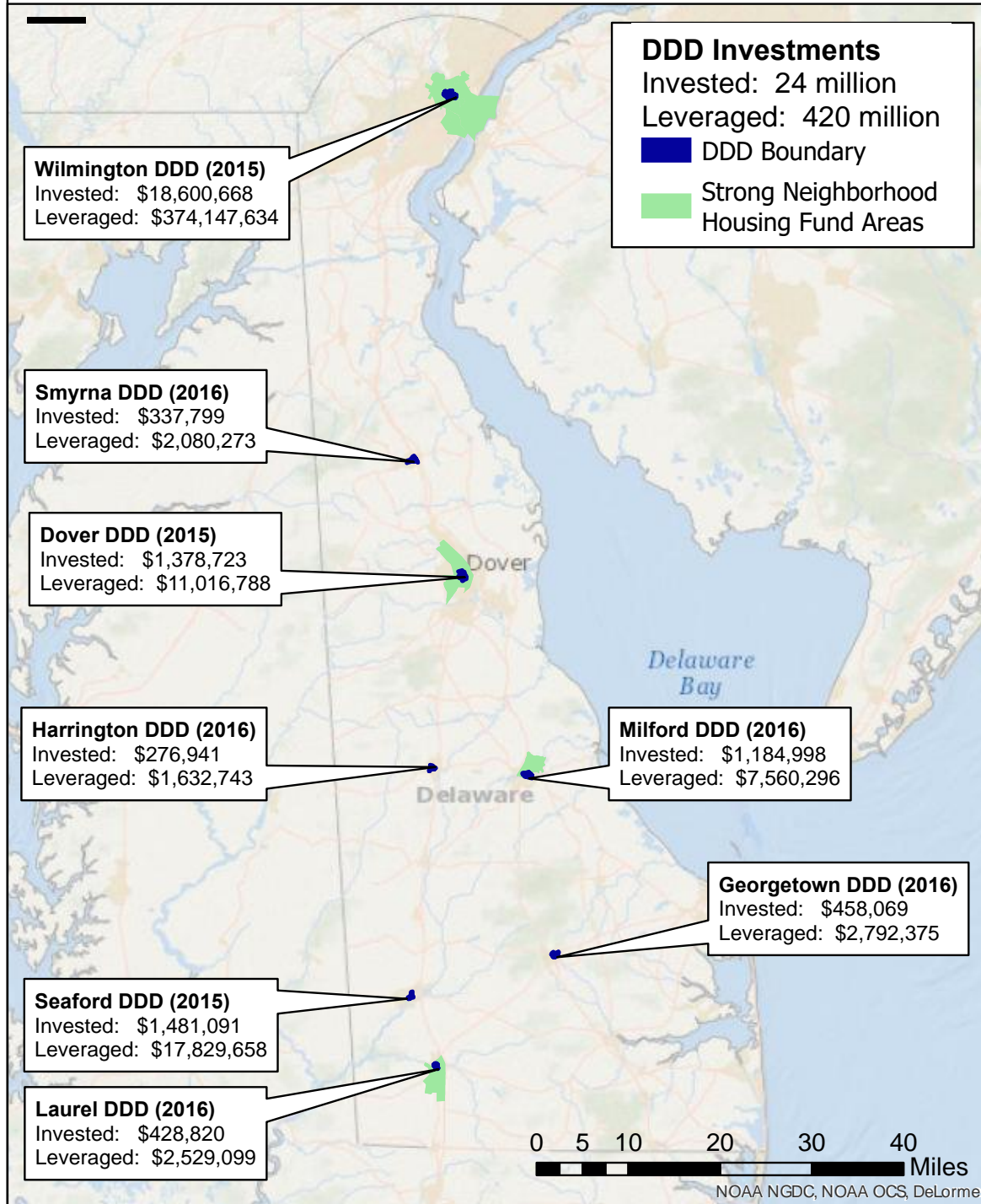
		FY15	FY16	FY17	FY18
Downtown Development District Grant *** Program (millions)	Reserved	\$5.6	\$8.5	\$7.8	\$7.75
	Leveraged	\$114	\$176	\$156	\$112

*** Includes both small and large projects.



Downtown Development Districts

Created: 9/19/2018 1:27 PM



APPENDIX C: DEMOGRAPHIC DATA

The U.S. Census Bureau's latest population estimates indicate that Delaware had 961,939 residents in 2017, an increase of 64,005 or 7.13 percent since the 2010 Census. Among the counties, the estimates show Sussex County has the highest growth with 14.39 percent increase, or 28,177 residents since the 2010 count. Kent County increased by 8.94 percent while New Castle County had the lowest growth rate at 3.96 percent (US Census, Annual Estimates of Residential Populations, 2010–2017).

Table C.1 U.S. Census Population Change, 2010–2017, State of Delaware and Counties

	Population Projections		Change 2010–2017	
	2010	2017	Net Change	Percent
Delaware	897,934	961,939	64,005	7.13%
Kent	162,310	176,824	14,514	8.94%
New Castle	538,479	559,793	21,314	3.96%
Sussex	197,145	225,322	28,177	14.29%

Source: US Census Bureau, 2010 Census; US Census Bureau, Population Division, Annual Estimates of the Resident Population: April 1, 2010 to July 1, 2017.

The American Community Survey is a nationwide survey designed to provide communities a fresh look at how they are changing. The ACS replaced the decennial census long form in 2010 and thereafter by collecting long-form type information throughout the decade rather than only once every 10 years. The ACS produces demographic, social, housing, and economic estimates in the form of 1-year, 3-year, and 5-year estimates based on population thresholds. The strength of the ACS is in estimating population and housing characteristics.³

In order to provide some context to Delaware's demographics and housing characteristics, Table C.2 below compares our state to the United States as well as to the states that border Delaware: Maryland, New Jersey, and Pennsylvania. When reviewing the table, there are a few items that stand out:

- Delaware is growing faster (more than 3 percent growth since 2010) than the national average or any of the surrounding states;
- Delaware's percentage of school aged children is lower than the national average and all surrounding states except Pennsylvania, and the percentage of adults over 65 years old is higher than the national average;
- Delaware is more diverse than the national average, particularly in regards to the African American population. However, Delaware's Hispanic population is less than the national average and consistent with all of the surrounding states except New Jersey, which has a much higher Hispanic population;

³ Adapted from the U.S. Census Bureau's American Factfinder website glossary, <https://factfinder.census.gov/help/en/index.htm#glossary.htm>

- Delaware has a higher rate of homeownership (71%) than the nation and any of the surrounding states. However, Delaware also has a much higher housing vacancy rate (17%) than the nation or the region. The large number of seasonal vacation homes in Sussex County contributes to the housing vacancy rate.
- The median housing value (\$231,500) and median household income (\$79,262) in Delaware are both higher than the national average and Pennsylvania, but significantly less than Maryland and particularly New Jersey.

Table C.2 Selected Demographics from the American Community Survey 2010–2015 Estimates

	United States	Delaware	Maryland	New Jersey	Pennsylvania
Total Population					
2010 Census	308,745,538	897,934	5,773,552	8,791,894	12,702,379
2015 ACS	316,515,021	926,454	5,930,538	8,904,413	12,779,559
% growth 2010 Census – 2015 ACS	2.52%	3.18%	2.72%	1.28%	0.61%
% of Population					
Age					
0–5	6.3%	6.0%	6.2%	6.0%	5.6%
5–9	6.5%	6.1%	6.3%	6.2%	5.9%
10–14	6.5%	6.1%	6.4%	6.5%	6.0%
15–19	6.7%	6.5%	6.6%	6.6%	6.7%
20–24	7.1%	7.0%	6.8%	6.3%	6.8%
25–34	13.5%	13.0%	13.7%	12.8%	12.6%
35–44	12.8%	12.0%	13.1%	13.3%	12.0%
45–54	13.9%	14.1%	15.0%	15.2%	14.4%
55–59	6.6%	6.8%	6.8%	6.9%	7.3%
60–64	5.8%	6.3%	5.9%	5.8%	6.3%
65–74	7.9%	9.3%	7.6%	7.8%	8.6%
75–84	4.3%	4.7%	3.9%	4.4%	5.1%
85+	1.9%	1.9%	1.8%	2.2%	2.5%
% 5–19	19.7%	18.7%	19.3%	19.3%	18.6%
% 65+	14.1%	15.9%	13.3%	14.4%	16.2%
Median Age	37.5	39.3	38.2	39.4	40.5

	United States	Delaware	Maryland	New Jersey	Pennsylvania
Race					
White	73.6%	69.4%	57.6%	68.3%	81.6%
Black or African American	12.6%	21.6%	29.5%	13.5%	11.0%
Asian	5.1%	3.6%	6.0%	9.0%	3.1%
Hispanic or Latino	17.1%	8.7%	9.0%	19.0%	6.4%
Educational Attainment					
% High school graduate or higher	86.7%	88.4%	89.4%	88.6%	89.2%
% Bachelor's Degree or higher	29.8%	30.0%	37.9%	36.8%	28.6%
Housing Characteristics					
% Owner*	63.9%	71.2%	66.8%	64.5%	69.2%
% Renter *	36.1%	28.8%	33.2%	35.5%	30.8%
*Of occupied housing units					
% Vacant housing units**	12.3%	17.0%	10.1%	10.9%	11.2%
** Of total housing units					
Income and Poverty					
Median Home Value	\$178,600	231,500	\$286,900	\$315,900	\$166,000
Median Mortgage	\$1,492	\$1,537	\$1,951	\$2,386	\$1,425
Median Rent	\$928	\$1,018	\$1,230	\$1,192	\$840
Income and Poverty					
Mean Household Income	\$75,558	\$79,262	\$97,801	\$99,026	\$73,175
% of families in poverty	11.3%	8.2%	7.0%	8.2%	9.3%
% of individuals in poverty	15.5%	12.0%	10.0%	10.8%	13.5%

Unless otherwise noted all data is from the 2011-2015 American Community Survey 5-year Estimates.

According to the Delaware Population Consortium (DPC), Delaware's population is projected to grow by more than 195,000 between 2010 and 2050, an increase of 17.8 percent, reaching a projected population of just under 1.1 million. Sussex County is expected to see the largest percent increase in population by 26.8 percent. Kent County's population is projected to reach 215,279 by 2050, an increase of 24.2 percent. New Castle County is expected to grow by 11.6 percent over the same period, adding just over 71,000 to reach a 2050 population of 609,921.

Table C.3 Delaware Population Projections: 2010–2050

	Population Projections		Change 2010–2050	
	2010	2050	Net Change	Percent
Delaware	899,778	1,095,621	195,843	17.88%
Kent	162,978	215,279	52,301	24.29%
New Castle	538,912	609,921	71,009	11.64%
Sussex	197,888	270,421	72,533	26.82%

Source: Delaware Population Consortium, Release Date: October 2017.

The DPC projections indicate that the percentage of school-aged children will gradually decrease from 19.7 percent in 2015 to 16 percent in 2050. During the same period the projections indicate that the percentage of adults 65 years old or older will increase from 14.4 percent to over 24 percent. Delaware is projected to become more diverse as well, with the white population projected to decrease from 65.3 percent in 2015 to 50 percent by 2050.

Delaware is projected to have 105,227 additional households between 2015 and 2050. Each household will need a place to live, resulting in the demand for about that many new housing units during the same period. Considering that according to the 2010 Census the City of Wilmington contained 32,820 housing units, this represents the construction of the equivalent of more than 3 additional Wilmington-sized cities in Delaware by 2050.

Table C.4 Demographic Projections for State of Delaware

	2010	2015	2020	2025	2030	2035	2040	2045	2050
Total Population	899,778	949,337	989,665	1,019,558	1,045,587	1,065,047	1,078,927	1,088,769	1,095,621
% School Age	19.73%	18.85%	18.08%	17.54%	17.09%	16.76%	16.40%	16.11%	16.05%
% 65+	14.46%	16.19%	18.47%	20.79%	22.76%	23.96%	24.37%	24.36%	24.66%
Households	328,765	352,595	373,811	392,515	407,535	419,002	426,726	431,552	433,992
% White	65.37%	62.63%	60.90%	59.29%	57.39%	55.46%	53.54%	51.75%	50.15%
% Black	20.92%	21.76%	22.23%	22.74%	23.15%	23.56%	23.98%	24.38%	24.76%
% Hispanic	8.19%	9.17%	9.97%	10.85%	11.75%	12.69%	13.63%	14.46%	15.20%
% Other Race	5.52%	6.44%	6.90%	7.13%	7.72%	8.28%	8.85%	9.41%	9.89%

Source: Delaware Population Consortium 2016(v0) Projections – Single Year 5-year Age Cohorts. October 2017.

APPENDIX D: COMPREHENSIVE PLANNING PROGRESS

Since September 2017, the Governor has certified three comprehensive plans. These were the Town of South Bethany, the Town of Laurel, and the City of Lewes.

The Office of State Planning Coordination (OSPC) is currently working with 31 towns and 2 counties that are in the process of updating their plans. The OSPC also worked with one town to complete its 5-year review during this planning period. The Town of Woodside continues to work on its first comprehensive plan.

In the next year, there are approximately five municipalities that should begin their comprehensive plan updates and three that will be reviewing their plan to determine if changes need to be made for their 5-year update.

The following table shows the current status of all municipal comprehensive plans. Municipalities that are currently known to be updating or amending their comprehensive plans are noted to be “in progress.” There are three municipalities in New Castle County that do not have plans because they have ceded control of planning and zoning to the county.

Table D.1 Municipal and County Comprehensive Plan Activity

Municipality	County	Latest Planning Activity	Certified
Arden	New Castle	Under County control	n/a
Ardencroft	New Castle	Under County control	n/a
Ardentown	New Castle	Under County control	n/a
Bellefonte	New Castle	Update in progress	08/13/2007
Delaware City	New Castle	Master plan in progress (Ft. DuPont) Update in progress (extension granted until 11/2019)	11/24/2008
Elsmere	New Castle	No activity	08/12/2010
Middletown	New Castle	Plan amended 2017	09/10/2012
Newark	New Castle	Plan amended 2018	1/5/2017
New Castle	New Castle	Amended 2018; Update in progress	07/21/2009
Newport	New Castle	Amended 2017	12/18/2014
Odessa	New Castle	5-year review completed	10/01/2012
Townsend	New Castle	No activity	07/07/2010
Wilmington	New Castle	Plan update in progress	09/28/2010
New Castle County		Amended UDC 2017, 2018	7/1/2012
Bowers Beach	Kent	Plan update in progress	05/15/2009
Camden	Kent	Update in progress (extension granted until May 2019)	05/05/2008
Cheswold	Kent	Plan update in progress	12/18/2010

Municipality	County	Latest Planning Activity	Certified
Clayton	Kent	Update in progress	12/08/2008
Dover	Kent	Update in progress	02/09/2009
Farmington	Kent	No activity	1/19/2016
Felton	Kent	Update in progress	11/10/2008
Frederica	Kent	No activity	9/2/2016
Harrington	Kent	Amended plan 2018; Pre-update completed to determine if plan should be updated at 5-year mark	12/16/2013
Hartly	Kent	No activity	8/10/2016
Houston	Kent	Update in progress; pending approval	07/12/2007
Kenton	Kent	Plan amended 2018	1/5/2017
Leipsic	Kent	Update in progress	11/06/2006
Little Creek	Kent	No activity	08/07/2006
Magnolia	Kent	Update in progress	03/16/2009
Viola	Kent	Update in progress	03/17/2004
Woodside	Kent	Plan in progress	
Wyoming	Kent	No activity	05/02/2011
Milford	Kent/Sussex	No activity	1/22/2018
Smyrna	Kent/New Castle	Amended plan 2018	2/04/2013
Kent County		Plan update in progress	11/1/2008
Bethany Beach	Sussex	No activity	2/17/2012
Bethel	Sussex	Update in process	07/08/2008
Blades	Sussex	Update in process (extension granted until May 2019)	04/17/2008
Bridgeville	Sussex	Update in progress; pending approval	09/11/2006
Dagsboro	Sussex	No activity	04/27/2009
Delmar	Sussex	Update in progress	10/25/2010
Dewey Beach	Sussex	Update in progress; approval letter sent, awaiting adoption	07/29/2007
Ellendale	Sussex	Update in progress	10/06/2009
Fenwick Island	Sussex	No activity	10/26/2017
Frankford	Sussex	No activity	09/08/2008
Georgetown	Sussex	Update in progress	01/13/2010
Greenwood	Sussex	Update in progress (extension granted until April 2019)	01/08/2008
Henlopen Acres	Sussex	Updated 2016, not certified	07/09/2004
Laurel	Sussex	No activity	4/22/2018
Lewes	Sussex	Amended 2018	10/16/2017
Millsboro	Sussex	Update in progress	06/01/2009

Municipality	County	Latest Planning Activity	Certified
Millville	Sussex	Update in progress	02/10/2009
Milton	Sussex	Update in progress	05/03/2010
Ocean View	Sussex	No activity	07/13/2010
Rehoboth	Sussex	Update in progress	07/23/2010
Seaford	Sussex	Update in progress	01/12/2010
Selbyville	Sussex	Update in progress (extension granted until September 2018)	08/06/2007
Slaughter Beach	Sussex	Update in progress; awaiting final changes from PLUS review	01/14/2008
South Bethany	Sussex	No activity	07/27/2017
Sussex County		Update in progress (extension granted until December 2018)	6/24/2018

APPENDIX E: HIGHLIGHTS FROM LOCAL JURISDICTIONS ANNUAL REPORTS

This section highlights accomplishments and issues with local governments, as noted in their comprehensive plan annual reports. We feel this will help the State to maintain and strengthen the partnership approach to land use planning we have been nurturing over the years.

As of September 1, 2018, 39 municipalities and 2 counties have submitted an annual report. Most of the municipalities and the counties that submitted reports are working to implement the goals and objectives set forth in their comprehensive plans. Of those jurisdictions reporting, 2 have noted that plan amendments may be needed at this time, 11 are working on or have recently updated their ordinances or zoning code, 13 municipalities are considering bike and/or pedestrian walkway plans or trails, 12 towns have added or are working on adding parkland or a playground, and 8 are working to create a master plan or continue to move forward with an adopted master plan. In addition, 10 local jurisdictions have identified issues that they feel could require technical assistance from the OSPC.

New Castle County

Bellefonte	The town has been working to incorporate state comments in to the draft of their comprehensive plan update and expect a second review by fall 2018. In addition, the town completed construction to make the town hall compliant with regulations of the Americans with Disabilities Act (ADA), held a public safety/crime prevention workshop with New Castle County police, and is currently completing an inventory and review of town housing stock to assess non-conforming properties.
Delaware City	Fort DuPont has been annexed into the City and the restoration of historic properties has been started. They are also planning for new homes, and business recruitment for the site has begun.
Middletown	The town has noted that overcoming 2008 economic development is a success because housing is still booming, businesses continue to come to both the Westown and downtown areas, and population of the of the town has increased by 11.3 percent since 2010. With this growth does come concerns and the town is working to keep up with aging infrastructure, sewer capacity, water quality, and the continuous need for more police.
Newark	The city completed a comprehensive analysis of the student and non-student rental housing needs. The city has also begun working with DelDOT to create a transportation improvement district (TID). In addition, the city received an \$80,000 grant to create a Sustainability Plan.
New Castle	The city completed a plan with the Resilient Community Partnership addressing how to build infrastructure against coastal hazards and improving preparedness. The city also completed the pier construction. In addition, the city adopted a new charter and adopted a Downtown Development District (DDD) to be added to their comprehensive plan for the revitalization of the city's downtown area.
Odessa	Artesian Water Company continues to connect residents to water as they request it. The Planning Commission is reviewing updates to the zoning ordinance and the town has had two annexations proposed, but they are not moving forward at this time.

Townsend	The town is updating a Stormwater Management Study that was conducted in 2010. The update is for potential damage issues within the towns system and the town will be seeking funding to address the issues. In addition, the town is working toward a systematic approach to notify New Castle County of properties to be annexed into town limits.
Wilmington	The city continues to construct and renovate both residential areas and business. Wilmington continues to see economic development in the central business district and along the waterfront. The city has updated their zoning code and is currently updating their comprehensive plan. In addition, staff members are working to update the 2008 bike plan for the city.

Kent County

Kent County	The county is in the final stages of their plan update. In addition, Kent County is working with DelDOT to identify and plan for two TIDs.
Bowers Beach	New jetty walls and channel dredging have been completed. The town is working with state and federal authorities for engineered long-term beach replenishment.
Camden	The town continues to grow with a Wawa planned on the east side of US 13. All approvals have been granted and outside retail shops are being solicited for the same commercial site. The King property north of Voshell Mill Road is beginning to develop with the Grotto's Pizza construction. Other avenues on this site are being explored as well.
Cheswold	The town hired a code enforcement officer and completed the town hall parking lot. The town continues to resolve issues related to the M-1 zoning code and is making progress in obtaining fire hydrants for Old Town. In addition, the McGinnis Green retail site has seen partial development.
Clayton	The town is working to make visual improvement to the town center including obtaining benches and planters. The town has begun the update of their comprehensive plan and they anticipate adopting the plan by the end of 2018.
Dover	The city worked to update the Preliminary Land Use Service (PLUS) memorandum of understanding (MOU) with the state, adjusting the criteria for determining which projects must go through the process. In addition, staff was part of a working group for the Dover/Kent County MPO regional bicycle plan update and staff has also begun to implement the Schutte Park Master Plan by applying for and receiving a grant from DNREC for construction of an "inner loop" trail and a disc golf course.
Felton	The town is working on interconnecting the sidewalks within the town to create a pedestrian system. In addition, the open space in the Hidden Pond subdivision has been turned over to the town and is being used for recreation activities.
Frederica	The town has hired a code enforcement officer to help enforce town codes and clean up buildings in disrepair. In addition, through a sustainability grant awarded by DNREC the town is working on a brownfield site and hopes to convert the site into a public park and site for a farmer's market.
Hartly	The town has finalized an MOU with Kent County regarding sewer service, and the development of several homes within the town have begun. The town would like to update its charter but continues to struggle with the issue of participation by town residents.
Houston	The town has been working on its comprehensive plan update. The plan is near completion and the town is hoping to have it certified by the end of the year.
Kenton	The town completed a new playground this year. The town completed a comprehensive plan amendment to include a parcel in their annexation area.

Leipsic	The town is moving forward with plans for a town park in the center of Leipsic and are preparing for the second annual oyster festival in October.
Magnolia	The town joined the National Flood Insurance Program so that residents may purchase flood insurance.
Milford	The city is beginning the process of developing a transfer of development rights (TDR) program through a partnership with the Department of Agriculture and is working with DelDOT on a TID for the Southeast neighborhood.
Smyrna	The town reported that their DDD designation has been instrumental in the rehabilitation of a residential duplex and the expansion of four businesses within the town center. In addition, the town has completed a downtown park made possible through a grant from the Neighborhood Building Blocks Fund.
Viola	The town has established a police department, which has made progress on the speeding issues. They have worked with the Kent Conservation District to repair and upgrade drainage in the northeast quadrant of town and are looking forward to the start of phase two of the project. The town has also updated their website with assistance from the Delaware Department of Technology and Information.

Sussex County

Sussex County	The county is currently in the final stages of a 2.5-year project to update their comprehensive plan. In addition, they have created a recreational area in Georgetown and completed a rewrite of their commercial code.
Bridgeville	The town has created an Economic Development Committee and funded an Economic Development budget to target areas to foster and attract economic development. Bridgeville has been working to update their plan and expects to submit to the state for certification this fall.
Dagsboro	The town is making improvements to the water distribution system, developing a drainage improvement plan, and working to implement the self-designated DDD by working to establish incentives that will attract new business.
Delmar	The town noted in their report that they have been able to maintain the largest employer through the downward spiral of the economy to its slow return, Perdue will be relocating their Agricultural Corporate Business Office to Delmar. This has sparked interest from other businesses. In addition, Nanticoke Health Services will be locating in the town. The town still struggles to keep businesses downtown, and they are constantly seeking new prospective businesses to locate in that area.
Dewey Beach	The town has been updating their comprehensive plan, and as of August, the plan is ready for adoption to begin the certification process.
Fenwick Island	The town received certification of their comprehensive plan in October 2017. Since the certification, the town received grants to begin working on water quality, sustainability, and sidewalks.
Georgetown	The town is working on a walkability and connectivity study as well as updating their codes. The DDD designation has generated a lot of interest in renovation and redevelopment. The town has secured their large project that received a reservation for a \$2.6 million investment.
Greenwood	The town has issued two building permits for new homes. In addition, they have repaved two alleys within the town and added 16 handicap ramps for ADA accessibility. The town is currently working to update their comprehensive plan.

Henlopen Acres	The town is working on their tree canopy requirements and an asset management plan has been drafted.
Lewes	The city updated their annexation district plan to include provisions that promote connectivity and alignment of open space set aside as part of the cluster option. The city also updated their bicycle route map for those coming into the area for the trails.
Millsboro	The town continues to make improvements to their water and wastewater systems. In addition, the town is preparing for an east/west connectivity study for pedestrian and bicycle traffic and are planning to include a self-identified DDD to their planning tools.
Millville	The town noted that they have completed or are actively working on all 38 action items identified in their certified plan. The town, with the help of DNREC, has purchased land for Millville's first park/playground. The park will include a community building, a challenge obstacle course, three pickle ball courts, a bocce ball court, two playgrounds, and walking trails.
Milton	The town is currently working to address comments regarding their comprehensive plan update and hope to resubmit soon for approval so they can adopt and get the plan certified.
Ocean View	The town is currently upgrading their sidewalks to be ADA compliant. In addition, the town is working with the Ocean View Historical Society to expand their historic structures by allowing them to construct a replica of the old Hall's store.
Seaford	The city is actively working on many of the implementation items included in the plan and have begun the process of updating the current plan. The report stated that the DDD designation has been expanded to just under 85 acres and has created several development proposals and revitalization projects that are currently in various stages of planning, construction, or completion. The DDD has been a major boost to the downtown area.
Selbyville	The town is currently upgrading their water and wastewater systems. In addition, the town has begun the update of their comprehensive plan by doing a land use survey to be compared to the existing future land use map to determine if inconsistencies exist.
South Bethany	The town implemented traffic calming and pedestrian safety concepts over the summer. In addition, the town is repurposing the existing police department in lieu of allocating taxpayers' dollars for expansion.

APPENDIX F: DOWNTOWN DEVELOPMENT DISTRICT TABLES

Table F.1 Downtown Development District (DDD) Summary Report FY15-FY18, Ending 6/30/18

DDD Funding Reserved/Expended				
Large Projects	Total Development Cost (TDC)	Qualified Real Property Investment (QRPI)	Reservation/ Rebate	#
Active Reservations	\$304,783,640	\$208,050,290	\$16,398,191	43
Rebates Issued	\$106,286,647	\$68,908,170	\$6,522,679	20
Subtotal	\$411,070,287	\$276,958,460	\$22,920,870	63
Small Projects				
Rebates Issued	\$8,518,579	\$6,460,027	\$1,253,150	56
Grant Total	\$419,588,866	\$283,418,487	\$24,174,020	119
DDD Rebates Issued by Fiscal Year				
Large Projects				
FY16	\$21,832,730	\$10,594,826	\$1,563,979	5
FY17	\$29,294,018	\$14,645,893	\$1,165,023	5
FY18	\$55,159,899	\$43,667,451	\$3,793,677	10
Subtotal	\$106,286,647	\$68,908,170	\$6,522,679	20
Small Projects				
FY16	\$2,771,379	\$1,162,636	\$222,193	7
FY17	\$1,951,234	\$1,651,157	\$329,307	18
FY18	\$3,795,966	\$3,646,234	\$701,649	31
Subtotal	\$8,518,579	\$6,460,027	\$1,253,149	56
Large and Small Projects				
FY16	\$24,604,109	\$11,757,462	\$1,786,172	12
FY17	\$31,245,252	\$16,297,050	\$1,494,330	23
FY18	\$58,955,865	\$47,313,685	\$4,495,326	41
Grand Total	\$114,805,226	\$75,368,197	\$7,775,828	76

DDD Rebates Issued by Eligible Use

Large Projects	TDC	QRPI	Rebate	#
Commercial	\$43,171,681	\$32,141,133	\$2,450,798	6
Mixed-use	\$53,704,932	\$29,639,415	\$3,347,480	11
Residential	\$9,410,034	\$7,127,622	\$724,401	3
Subtotal	\$106,286,647	\$68,908,170	\$6,522,679	20
Small Projects				
Commercial	\$4,433,346	\$2,686,393	\$536,263	24
Mixed-use	\$1,775,134	\$1,678,559	\$302,082	8
Residential	\$2,310,099	\$2,095,075	\$414,805	24
Subtotal	\$8,518,579	\$6,460,027	\$1,253,150	56
Large/Small Projects				
Commercial	\$47,605,027	\$34,827,526	\$2,987,061	30
Mixed-use	\$55,480,066	\$31,317,974	\$3,649,562	19
Residential	\$11,720,133	\$9,222,697	\$1,139,206	27
Grand Total	\$114,805,226	\$75,368,197	\$7,775,829	76

DDD Rebates Issued To-Date by Activity

Large Projects	TDC	QRPI	Rebate	#
New Construction	\$39,251,379	\$31,321,920	\$2,224,401	5
Rehab-Existing Building	\$67,035,268	\$37,586,250	\$4,298,278	15
Subtotal	\$106,286,647	\$68,908,170	\$6,522,679	20
Small Projects				
New Construction	\$1,231,458	\$1,196,198	\$235,028	9
Rehab-Existing Building	\$7,287,121	\$5,263,829	\$1,018,122	47
Subtotal	\$8,518,579	\$6,460,027	\$1,253,150	56
Large/Small Projects				
New Construction	\$40,482,837	\$32,518,118	\$2,459,429	14
Rehab-Existing Building	\$74,322,389	\$42,850,079	\$5,316,400	62
Grand Total	\$114,805,226	\$75,368,197	\$7,775,829	76

Table F.2 DDD Large-Project Rebate Reservations, FY18, Announced February 19, 2018

Investor	District	Eligible Use	Project Cost	Rebate/ Reservation
Faithwork LLC	Dover	Commercial	\$ 3,688,540	\$ 488,346
Jaelen LLC	Georgetown	Mixed-use	\$ 2,561,386	\$ 457,997
Villas on Broad Creek	Laurel	Residential	\$ 2,419,899	\$ 406,980
500 Market LLC	Wilmington	Commercial	\$ 306,663	\$ 51,909
519 Market LLC	Wilmington	Commercial	\$ 7,435,463	\$ 557,000
610 Market Retail LLC	Wilmington	Commercial	\$ 1,492,661	\$ 208,367
Christian Growth Ministries	Wilmington	Mixed-use	\$ 4,611,448	\$ 500,000
Eastside Community Builders LLC	Wilmington	Commercial	\$ 1,924,000	\$ 257,400
Westside Wilmington Acquisitions LLC	Wilmington	Commercial	\$ 5,617,428	\$ 400,845
YBTZ, LLC	Wilmington	Mixed-use	\$ 23,392,300	\$ 1,000,000
LP-Round 6, FY18 TOTAL		10	\$ 53,449,788	\$ 4,328,844

Table F.3 DDD Large-Project Rebate Reservations, FY18, Announced June 27, 2018

Investor	District	Eligible Use	Project Cost	Rebate/ Reservation
Connections Community Support Programs	Harrington	Residential	\$ 484,400	\$ 61,000
200 Front LLC	Milford	Residential	\$ 2,587,000	\$ 404,905
Devreco Camden LLC	Milford	Commercial	\$ 1,992,500	\$ 259,500
210 Market Cooper LLC	Wilmington	Mixed-use	\$ 16,736,862	\$ 757,000
216 Ninth LLC	Wilmington	Mixed-use	\$ 1,921,940	\$ 165,100
417 Market LLC	Wilmington	Commercial	\$ 1,445,065	\$ 168,600
901 Market Associates LLC	Wilmington	Mixed-use	\$ 25,613,135	\$ 1,024,000
Quaker Village Preservation LLC	Wilmington	Residential	\$ 7,474,841	\$ 459,147
Solari Commercial Properties LLC	Wilmington	Mixed-use	\$ 637,139	\$ 122,428
LP-Round 7, FY18 TOTAL		9	\$ 58,892,882	\$ 3,421,680

Table F.4 DDD Small-Project Rebates, FY18

Investor	District	Eligible Use	Project Cost	Rebate Issued
2 West Lookerman, LLC (PH1 E/I)	Dover	Mixed-use	\$ 170,237	\$ 30,424
2 West Lookerman, LLC (PH2 Apt)	Dover	Residential	\$ 142,533	\$ 27,862
Casschar LLC	Dover	Commercial	\$ 57,577	\$ 10,912
Central Delaware Habitat for Humanity (2)	Dover	Residential	\$ 87,050	\$ 17,410
Central Delaware Habitat for Humanity (3)	Dover	Residential	\$ 108,547	\$ 21,709
Dover Century Club	Dover	Commercial	\$ 47,798	\$ 9,560
Milford Housing Development Corporation (1)	Dover	Residential	\$ 101,783	\$ 19,603
Milford Housing Development Corporation (2)	Dover	Residential	\$ 100,217	\$ 20,043
NCALL (1)	Dover	Residential	\$ 149,577	\$ 27,426
NCALL (2)	Dover	Residential	\$ 143,143	\$ 28,629
Greenlea, LLC	Georgetown	Commercial	\$ 92,593	\$ 18,519
H.P. Layton Partnership	Georgetown	Commercial	\$ 21,007	\$ 4,201
William Staples Insurance & Financial Services Inc.	Harrington	Commercial	\$ 36,434	\$ 5,559
Davis, Ann Leslie	Laurel	Residential	\$ 21,490	\$ 4,298
Laurel Redevelopment Corporation (Abbotts Grill)	Laurel	Commercial	\$ 87,710	\$ 17,452
100 Charles Street, LLC	Milford	Residential	\$ 89,508	\$ 17,902
Christian Owens (1)	Milford	Residential	\$ 69,127	\$ 13,625
Christian Owens (2)	Milford	Residential	\$ 15,200	\$ 3,040
Joseph Wiley (t/a JRW Rentals)	Milford	Residential	\$ 24,495	\$ 4,899
The Music School of Delaware, Inc.	Milford	Commercial	\$ 156,749	\$ 31,432
Triple Moon, LLC	Milford	Mixed-use	\$ 366,472	\$ 50,000
Zook, Justin & Cordelia	Milford	Residential	\$ 77,553	\$ 15,349
C. Bryan Bennett Revocable Trust	Seaford	Mixed-use	\$ 211,892	\$ 40,971
Craig de Mariana Aleman (5)	Seaford	Residential	\$ 159,275	\$ 30,795
Old Town Hall Associates, LLC	Seaford	Commercial	\$ 121,837	\$ 24,367
Zachary Parks	Seaford	Residential	\$ 70,072	\$ 14,254
Blue Hen Dental	Smyrna	Commercial	\$ 235,297	\$ 47,059
David Dettra (t/a Maverick Texas Barbeque)	Smyrna	Commercial	\$ 208,080	\$ 28,600
PSMP LLC	Smyrna	Residential	\$ 273,696	\$ 50,000
Café Mezzanotte of Wilmington, Inc.	Wilmington	Mixed-use	\$ 125,270	\$ 21,000
SK Restauration LLC	Wilmington	Mixed-use	\$ 223,747	\$ 44,749
TOTAL		31	\$ 3,795,966	\$ 701,649

ACKNOWLEDGEMENTS

State Agencies that Assisted with the Report

Thank you to all of the following agencies, and especially to the agency liaisons listed below, for their assistance with this year's report.

Department of Agriculture	Austin Short
Department of Education	James Pennewell
Department of Health and Social Services	Lisa Bond
Delaware State Housing Authority	Karen Horton
Department of Natural Resources and Environmental Control	Lisa Borin-Ogden
Office of Management and Budget	Damian Destefano
Department of Safety and Homeland Security	Terry Pepper
Department of Transportation	Drew Boyce

The OSPC would also like to thank Temple Carter for taking many of the pictures used in this report, and the OMB Budget Analysts who provided the fiscal data found in Appendix B.

Institute for Public Administration, University of Delaware

Special thanks go to Sarah Pragg for formatting and editing this document and Andrew Homsey and Sean O'Neill for their contributions in data analysis.