

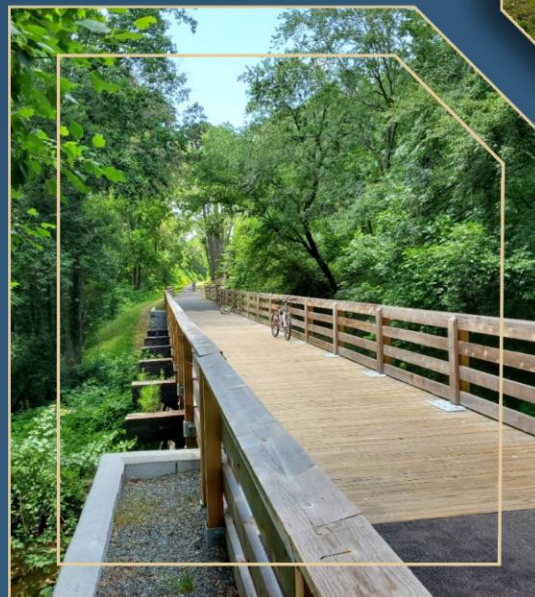


# *2021 Report on State Planning Issues*

*Prepared for  
Governor Carney and the 151st General Assembly*

*Prepared by the  
Cabinet Committee on State Planning Issues*

*October 2021*







# Acknowledgements

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John Carney

## *Cabinet Committee on State Planning Issues*

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### **Committee**

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| Director Eugene Young            | State Housing Authority                                   |

## *State Agencies that Assisted with the Report*

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

|   |                      |
|---|----------------------|
| Department of Agriculture                                 | Nikko Brady          |
| Department of Education                                   | Jennifer Carlson     |
| Department of Health and Social Services                  | Kim Ritter           |
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| Department of Natural Resources and Environmental Control | Beth Krumrine        |
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| Division of Small Business                                | Patty Cannon         |
| Department of Safety and Homeland Security                | Terry Pepper         |
| Department of Transportation                              | Pam Steinebach       |
| State Historic Preservation Office                        | Carlton Hall         |

The OSPC extends our collective appreciation to former OSPC Director, Connie Holland, and former Chair and Secretary of the Department of Transportation, Jennifer Cohan, for their inspiring leadership and long-standing service to the Cabinet Committee on State Planning Issues. 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*

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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.



*The Haslett Armory is home to the Office of State Planning Coordination.*

Photo Credit: Temple Carter

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**STATE OF DELAWARE**  
**EXECUTIVE DEPARTMENT**  
**OFFICE OF STATE PLANNING COORDINATION**

October 4, 2021

Dear Governor Carney and the Members of the 151<sup>st</sup> General Assembly,

The Office of State Planning Coordination (OSPC) presents the 2021 Annual Report on behalf of the Cabinet Committee on State Planning Issues, in accordance with the Delaware Planning Act (29 Del. Code Ch 91). The Cabinet Committee serves as an advisory body and includes leaders of state agencies whose missions intersect with land use planning in the state. Their role is to promote orderly growth and development, and to align the state's provision of infrastructure and services with local governments land use decisions.

This year has been marked by change in OSPC. Our Director, Connie Holland, retired in April after 20 years of State service and a planning career that spanned over forty years. During her remarkable tenure, statewide planning emerged from a novel idea to a collaborative effort among the State, its agencies and the sixty local governments. I am honored to have been selected as the new Director and I am looking forward to building on this legacy to address Delaware's emerging planning challenges.

In this report, we present many opportunities and some significant challenges as Delaware continues to grow. This year's report takes a close look at development trends in the State. Despite the uncertainty surrounding the Covid-19 pandemic our data demonstrates that 2020 was a robust market for industrial space and new housing. Three primary trends emerged:

- Several large logistics and warehousing projects in New Castle County were permitted in 2020, marking the most non-residential square footage recorded since 2008. These projects highlight the growth of the logistics industry due to changes in e-commerce driven by the pandemic.
- Residential construction has similarly boomed, demonstrated by 2020 emerging as the highest number of residential units permitted since we began collecting data. The majority of these permits were issued in Sussex County, which brings us to the third trend;
- Residential demand in Sussex is so great that a large number of new housing units are being constructed in the rural Investment Level 4 areas. In these areas the State's priorities are agricultural conservation, and as such these homes will not have the same access to infrastructure and public services while also jeopardizing the agricultural industry and natural environment.

I hope you find the data and project updates herein useful. As we emerge from the Covid-19 pandemic it is clear that the "new normal" will result in some unanticipated challenges and opportunities. OSPC looks forward to working with the agencies and local governments to address and overcome these challenges.

Sincerely,

A handwritten signature in blue ink, appearing to read "D. Edgell".

David L. Edgell, AICP  
Director, Office of State Planning Coordination



# *Introduction*

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*The 2021 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 on State Planning Issues (hereafter “Cabinet Committee”).*

The Cabinet Committee serves as an advisory body to the Governor and includes leaders of state agencies whose missions intersect with land use planning in the state. Their role is to recommend actions that promote orderly growth and development, align with the State’s land use goals, and encourage efficient use of state resources.

The purpose of the annual report is to share information relevant to planning and land use decisions and present data collected for analyzing residential and non-residential development trends. Also prominent in the report are highlights of projects led by Cabinet Committee agencies and partners. These projects are helping to revitalize communities, foster economic development, and balance prosperity with preserving our natural and cultural resources. Projects are grouped by the general themes outlined below:

## *Strengthening Delaware’s Economy*

Promoting the establishment and expansion of high-quality employment opportunities in sectors such as science, technology, banking, and finance has been a state goal for many years. Initiatives are ongoing to attract business and industry, ensure necessary infrastructure, promote cultural and ecotourism opportunities, and support small businesses.

## *Building Strong Communities*

Communities are strengthened by providing incentives for infill development and redevelopment, reducing crime and blight, and preparing for emergencies and a changing climate. Numerous projects and programs are underway to help our communities thrive economically and be resilient in the face of changing conditions.

## *A Healthier Delaware*

To improve Delawareans’ health outcomes and their quality of life, it is important to address the quality of the environment in which we all live. Several initiatives are providing communities with the data and resources needed to improve general health. Funding opportunities and programs for expanding outdoor recreation opportunities also aid in improving access to healthier lifestyles.

## *Agricultural, Natural, and Cultural Resources*

The character of Delaware is integrally linked to its agricultural roots, natural resources, and historic charm. Clean water is a necessary component of thriving communities and integral to supporting healthy ecosystems. Conserving these resources is essential to the quality of life that residents deserve and fosters eco and cultural tourism opportunities.

## *Better Schools for All Delaware Children*

Student enrollment statistics, school site selection processes, and other efforts are discussed in this report. These are just some of the data, policies, and initiatives that help ensure that capacity exists to educate Delaware's children and that schools are in a community setting with adequate infrastructure.

## *Planning for Connectivity and Mobility*

Transportation is a critical component of Delaware's infrastructure system, and the Delaware Department of Transportation (DelDOT) is responsible for over 85 percent of Delaware's roads. Projects discussed in this section provide a snapshot of transportation planning efforts.

## *Data, Resources, and Collaborations*

Planning is most effective with accurate and up-to-date information, sufficient resources, and engaged partners. Public policy planning efforts at the state and local level rely on the data and collaborations provided by the University of Delaware, the Delaware Population Consortium, and the U.S. Census Bureau. Efforts to improve geospatial coordination and to create a consolidated state land inventory are underway.

## *Analysis of Development Trends*

In addition to the projects above, the report includes a trend analysis of statewide building and development trends. Development approvals and building permit data have been collected from all 60 local jurisdictions since the start of 2008. Trends are discussed in the body of the report and detailed data is available in Appendix A.

## *State Financial Investments*

Finally, this report includes state financial investments relevant to planning goals, updated demographic data and population trends, the comprehensive plan status of local governments and their recent accomplishments, and Downtown Development District funding and projects (Appendices B–F).

# Overview of State Planning in Delaware

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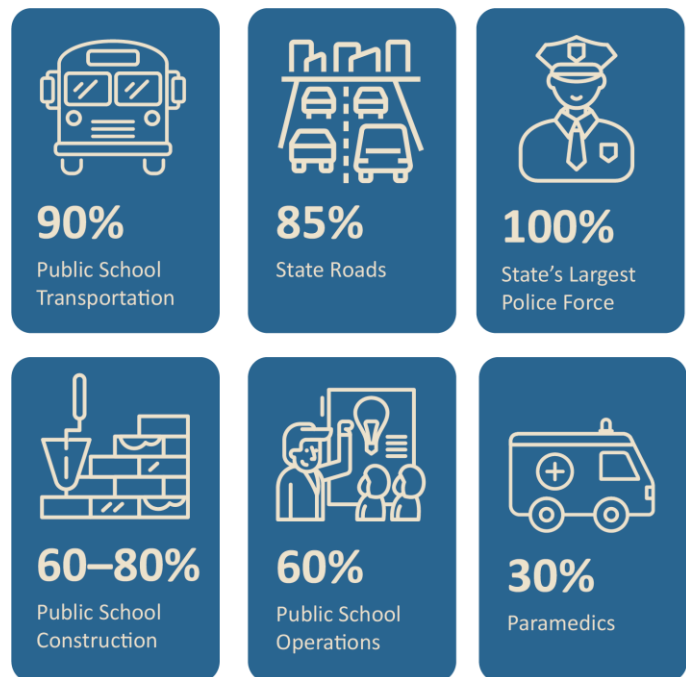
*Delaware is growing and changing in population size, composition, and density. Though land use decisions are made by local jurisdictions (municipal and county), the impact of local government land use decisions, land development patterns, and each Delawarean's decision of where to live affects us all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

## *The State Role in Land Use Planning*

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.

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

The State's role in land use planning has been recognized by the General Assembly for many years. In the past thirty 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.



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

# *State of Delaware Land Use Planning Structure*

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## *Cabinet Committee on State Planning Issues*

One of the most significant actions for improving the coordination of land use activities was the re-establishment of the Cabinet Committee on State Planning Issues (hereafter “Cabinet Committee”) in 1994. The Cabinet 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 Cabinet Committee. 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.

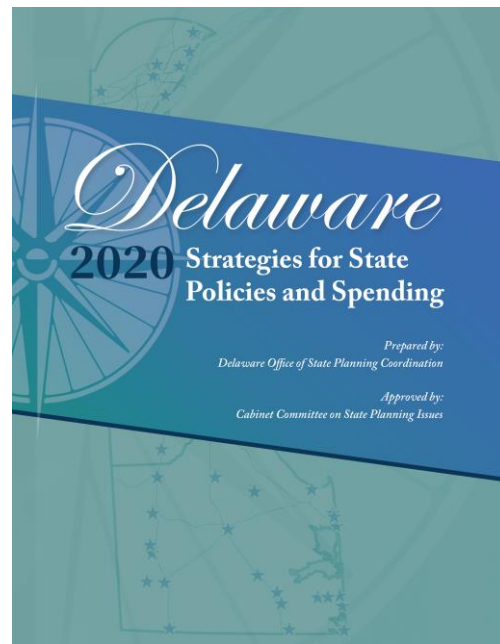


## *An Overview of the Strategies for State Policies and Spending*

The *Strategies for State Policies and Spending* (hereafter “*State Strategies*”) report is the key policy document that provides a framework for land use planning in Delaware. The *State Strategies* were first developed in 1999 by the Cabinet Committee on State Planning Issues to fulfill its directives under Title 29, Chapter 91 of the Delaware Code. The *State Strategies* provide a framework for the infrastructure and service investments by state agencies. Updates occur every five years. The Governor implemented the current 2020 *State Strategies* with Executive Order 42 on July 23, 2020.

The *State Strategies* 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.

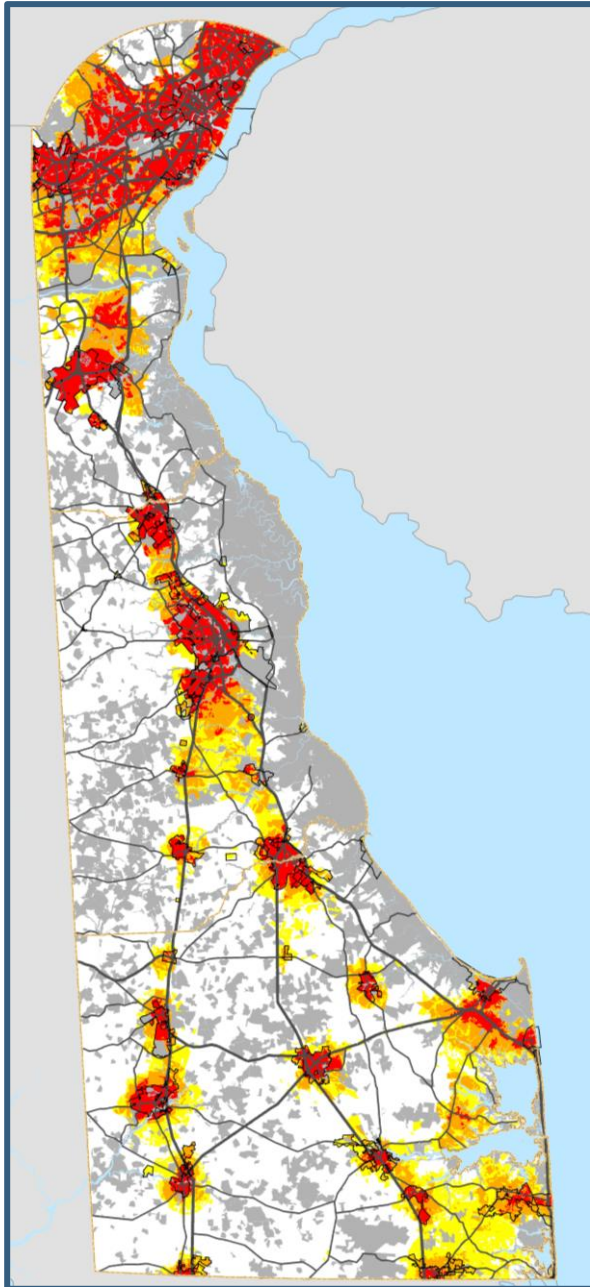
Spatial analysis (mapping) is a primary component of developing the *State Strategies* updates. The mapping incorporates data from certified county and municipal comprehensive plans, state agencies, and all relevant environmental and infrastructure data layers. The result is a map showing where levels 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 on the next page), which then serve to guide state investments.



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 featured on page 7 and detailed in [Appendix A: Development Trends and Data Analysis](#).

# Delaware State Strategies for Policies and Spending Investment Levels

*Last updated July 23, 2020*



**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.

# *Development Trends Analysis*

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## *A Story of Strategic Industrial Growth in New Castle County and Unprecedented Residential Growth in Sussex County*

### *Introduction*

The Office of State Planning Coordination (OSPC) began collecting comprehensive development information from across the state in 2008. The data, obtained from all 60 local jurisdictions, including all three counties in Delaware, assist in the tracking of development status and trends in the state. Every year in its annual report, the OSPC has included these data as an appendix upon which some of the report is based. This year, the OSPC is featuring a summary of the Development Trends Analysis in the body of this report to more clearly outline development trends in the state and to provide some additional thought and context to the causes and importance of these trends.

OSPC has, since 1999, coordinated with state agencies and local governments to prepare state-level policies regarding development priorities, along with a map showing where development is encouraged and discouraged. The latest approved version of this policy is the 2020 *Strategies for State Policies and Spending* (the *State Strategies*). This document, which is updated approximately every five years, is used in this analysis to determine the extent to which current development (expressed by development applications and building permits for residential and non-residential projects) is effectively guided by policies at state agencies and implemented by local government comprehensive plans and land use regulations.

The *State Strategies* defines four “Investment Levels,” or geographic areas, which specify the intensity of development encouraged in each by the state. Levels 1 and 2 are generally areas that are already heavily developed where infrastructure is already planned and where fiscal resources are spent to maintain the infrastructure already in place and support additional infrastructure to keep up with the demands of new growth. Level 3 areas may also be located where growth is planned in the long term but are usually undeveloped areas where the state’s fiscal resources should be spent to protect the environment. Additionally, Level 3 areas should be planned carefully to ensure that the next phase of infrastructure to support long-term growth areas identified by the towns and counties is done appropriately. In Level 4 areas, new development is discouraged, and the state’s fiscal resources should be spent to preserve farmland and open space as well as environmental features in these areas that are vital to our quality of life. Development in Level 4 areas is discouraged because eventually it will strain the existing infrastructure and force the state to spend its fiscal resources to build and maintain infrastructure in rural areas rather than focusing it in areas that have been effectively

planned for growth. By comparing locations where applications for development and building permits have been approved with the *State Strategies* Investment Levels described above, it is possible to gauge the effectiveness of the state's growth policies.

Factors that influence the location of new development are varied, and include, among others, state and local government infrastructure investments, county and municipal land-use plans, local development regulations, real estate market demands, lending practices, individual land developers, and consumer preferences. These factors were used to help develop the overall state policies put forth in the *State Strategies*.

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 degree to which this activity is focused where it is encouraged by state policies provides an indication of the efficacy of the *State Strategies* document in guiding growth. Overall, growth management in Delaware is a collaborative effort between the state and local governments. The state makes infrastructure and service investments, and the local governments make land use decisions. All levels of government need to work together for this to be effective, fiscally responsible, and environmentally sound.

## *Overview of Methodology*

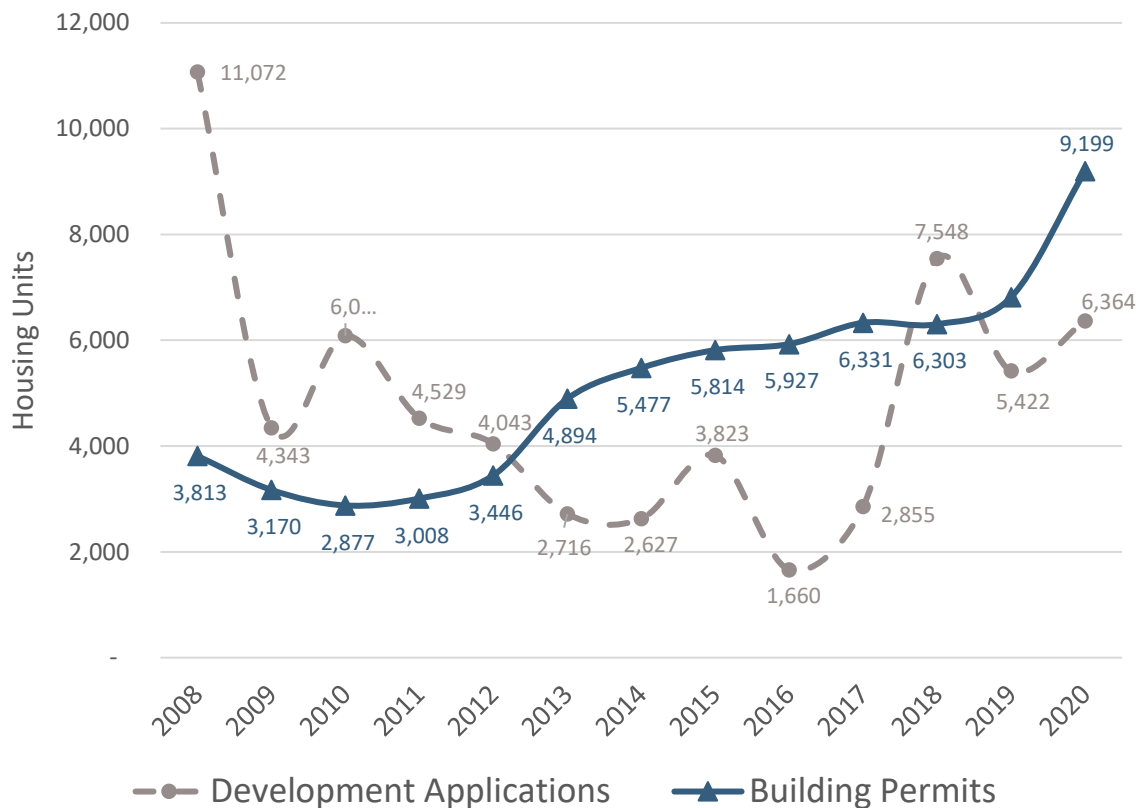
The OSPC and IPA conducted a spatial analysis to examine the location and extent of recently approved development across Delaware. Spatial analysis was performed using the ArcMap GIS software package produced by Esri. The OSPC obtains development application and building permit data from Delaware's municipalities and counties for each year from 2008 onward. These data form the basis for the spatial analysis. Some maps and charts in this summary use the last 5 to 6 years to aid in viewer interpretation and to highlight the most recent trends. 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.

## *Current Residential Trends*

In the annual development trends report, residential trends are measured based on the number of individual dwelling units in approved development applications and in building permits issued by local governments. On a statewide level, building permits have increased dramatically since the 2008–2011 recession. Development applications declined after the recession but began increasing significantly in 2017 (see Figure 1). Most notable is the increase in building permit activity from 2019 to 2020, reflecting the development boom that occurred in 2020 statewide. In addition, 2020 had the most residential building permits on record over the past 13 years with close to a 35% increase year-over-year in permit activity when compared to 2019.



**Figure 1. Trendlines for number of residential units in development applications (gray line) and building permits (blue line), 2008–2020**



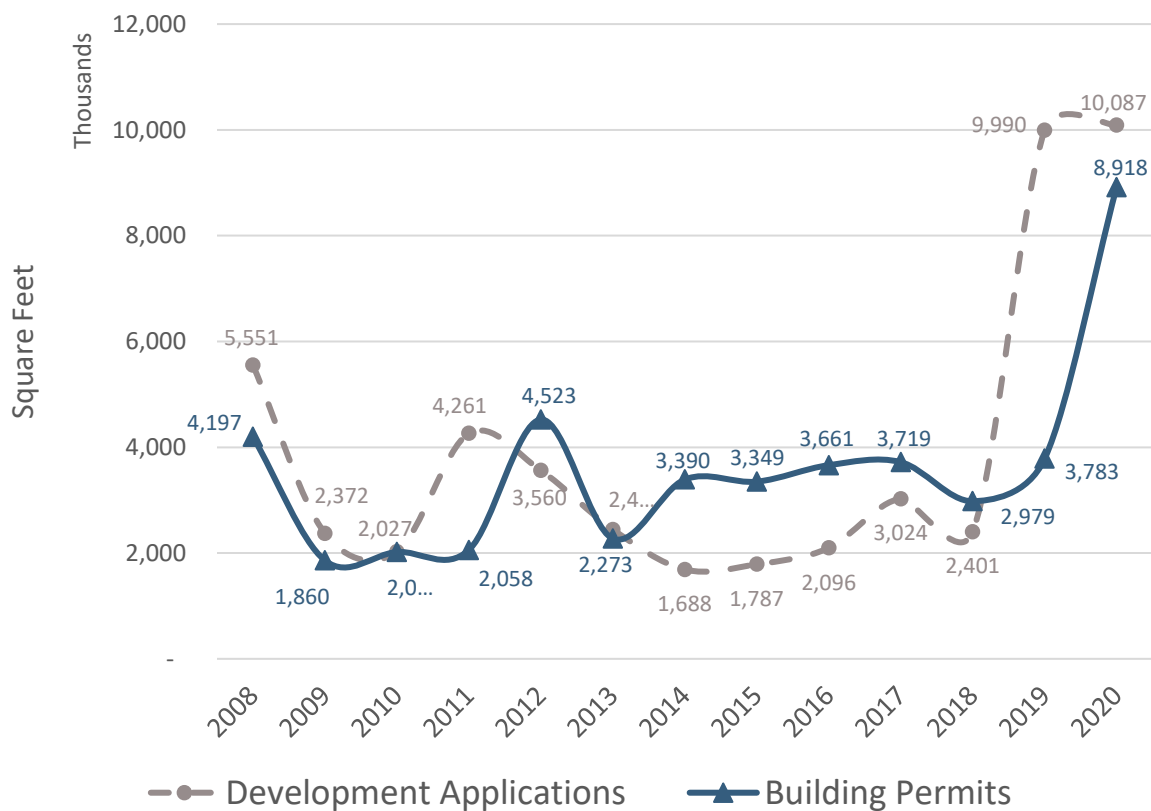
The trends also show some significant variation between the three counties. In terms of building permit activity, the big story has been tremendous growth in Sussex County. Sussex County has had just under 22,000 residential building permits approved over the past 6 years compared to just 11,565 for New Castle County and 6,877 for Kent County. The number of residential permits in Sussex has grown over time as well, with 2017, 2018, 2019, and 2020 each experiencing more approved residential building permits than the year before. In 2020 alone, the County approved 5,582 residential building permits which was a 36 percent increase over 2019. Additionally, the vast majority of this residential development is occurring in unincorporated areas of Sussex County. Development in unincorporated areas that were previously undeveloped means that there will be increasing needs for infrastructure and resources in the future in these areas, much of which is likely to come from the state government. In New Castle County, more of the new residential development has occurred in municipalities, but there has still been a very significant amount occurring in unincorporated county areas primarily in southern New Castle County. Development in rural unincorporated county areas brings with it additional long-term costs for both the State of Delaware and each County, which may not be understood at the time that the development and construction takes place. This is why the OSPC has outlined four Investment Levels throughout the state as outlined in the introduction. Level 4 areas are rural areas that are least desirable for development and

where the state discourages new development. Keeping this in mind, statewide during the past 6 years, approximately 13 percent of all residential building permits issued were in Level 4 areas (based on the 2020 *State Strategies*) and about 89 percent of the Level 4 development has occurred in Sussex County during that 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. On a statewide level both development applications and building permits have skyrocketed over the past two years in terms of square footage. This has likely been driven by several very large warehouse facilities that have been built in recent years, most in northern New Castle County near the intersection of Route 72 and Route 1 and the new multi-story Amazon.com warehouse being built at the old Boxwood Road GM plant site near Elsmere. The redevelopment of the old AstraZeneca business campus into the Avenue North mixed-use development off Route 202 near Nemours Children's Hospital is another very large significant non-residential development occurring in New Castle County.

**Figure 2. Trendlines for number of non-residential units in development applications (gray line) and building permits (blue line), 2008–2020**



On a county-by-county basis New Castle County continues to see the vast majority of non-residential building permits on the basis of square footage, largely due to the few large projects in northern New Castle County mentioned above. While historically New Castle County has much more non-residential development than Kent or Sussex, the amount of square footage has grown tremendously over the past two years. The year 2020 in particular saw exponential growth in unincorporated New Castle County areas. The large logistics centers in New Castle County that represent much of this growth are occurring in accordance with *State Strategies* and the New Castle County Comprehensive Plan with a focus on providing new jobs and economic growth for the state. Meanwhile, in 2020, Sussex County saw a significant increase in square footage approved while Kent County has had a consistently smaller amount for the last 6 years. Non-residential growth in Levels 3 and 4 have mostly come in Sussex County over the past 6 years despite having much less non-residential development overall compared to New Castle County. A concerning trend has been the increasing amount of development occurring in Sussex County along the Route 9 Corridor between Georgetown and the Five Points intersection outside of Lewes, which is mostly a Level 4 area. While the vast majority of the non-residential development statewide has been good for the state's economy in the near term, development in undeveloped and unincorporated County areas suggests that future growth around these locations could bring with them additional costs to the state in terms of needed infrastructure and environmental impacts.

## *Trends Summary*

From a broad perspective there are many large and important trends that are impacted by new development. There are economic impacts and costs, environmental impacts, traffic impacts, quality of life impacts and even climate change impacts that are felt both locally and statewide on some level every time a major development is completed. When one building, road, or parking lot is built, it is important to understand that these impacts and their consequences will be felt both immediately and in the long term. With that being said, we have identified three major development trends over the past 6 years in Delaware that are highlighted in this report. First, Delaware has become a popular location for some industrial warehouse developers to build logistics and distribution facilities, primarily in northern New Castle County where there is quick and convenient access to Interstate-95. Second, coastal Sussex County continues to develop a large amount of new residential homes mostly targeting retirees or people purchasing vacation homes. And third, development in Sussex County has too often occurred in areas that are not in compliance with the *State Strategies* or the *Sussex County Comprehensive Plan* and as such will have costly long-term impacts. These three trends are important to understand on their own, but in this trends summary we hope to outline some of the reasons for these trends and the implications of these trends for the state.

The first major trend has been the newfound attractiveness of Delaware for major industrial real estate developers to build large warehouse distribution facilities. Northern New Castle County welcomed the Amazon.com Boxwood Road facility and the DOT Foods

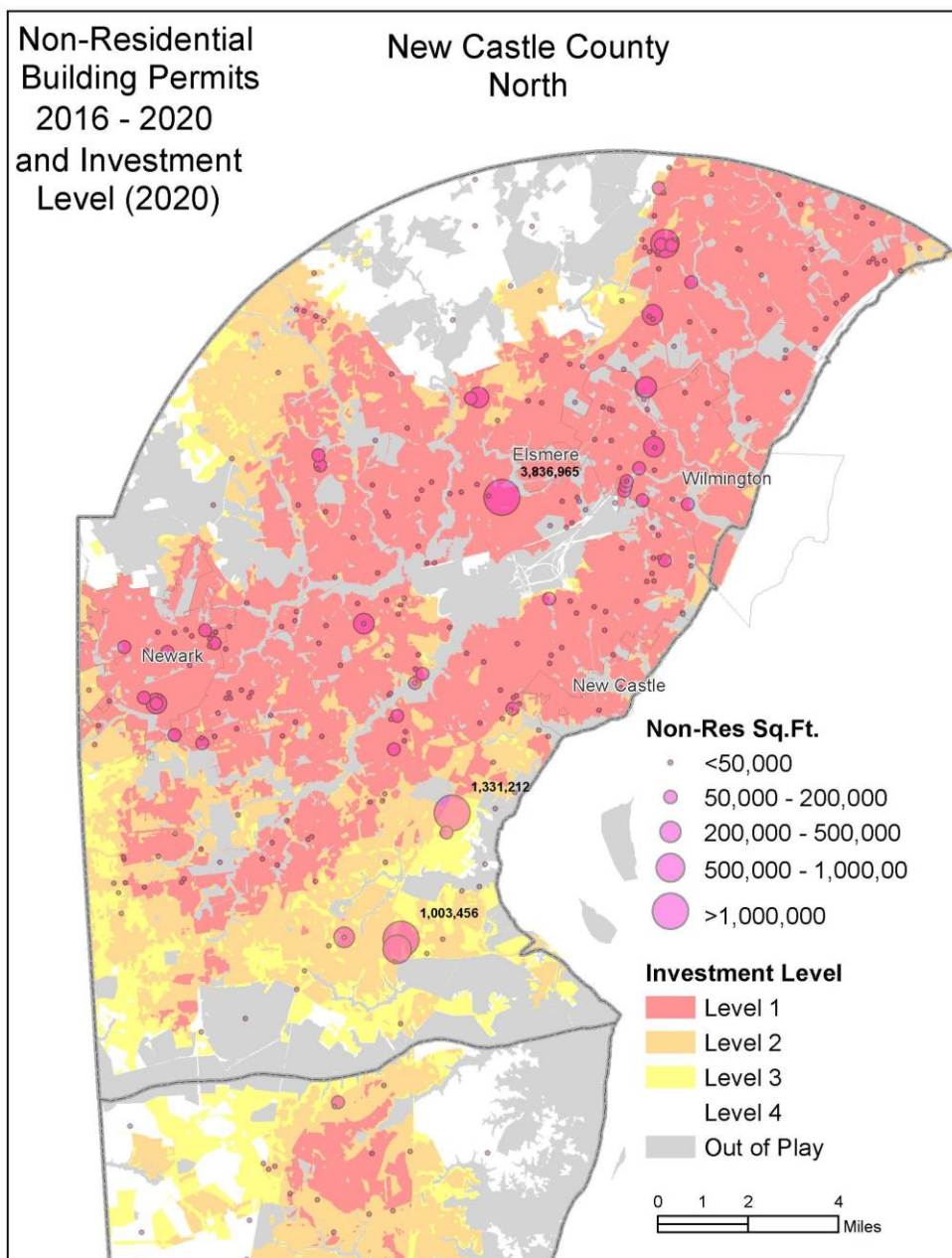
warehouse near the interchange of Route 72 and Route 1. Additional projects are in the development pipeline and are likely to come to other parts of the state soon. This trend is not unique to Delaware, as these large logistics and distribution facilities have been popping up for over a decade in places like Central Pennsylvania, Northern New Jersey, and Cecil County, Maryland. The development of these warehouses has coincided with the rise of the e-commerce industry, which has experienced a sharp increase in demand over the past year during the pandemic and is not likely to slow down very soon. Delaware has become a location that is now more attractive for these industrial logistics warehouse developers, and it is likely that more of these buildings will be built over the next 5 to 10 years at a minimum.

Developable land in the northern portion of New Castle County is limited, but it is not so limited in southern New Castle County or even in Western Sussex County. In general, these developments seem to be a positive change for the state. They provide jobs and can lead to additional jobs in nearby locations due to the nature of the work at these facilities. For the most part, these large developments have been occurring in accordance with the State Strategies and the local government comprehensive plans. These large buildings have been constructed mostly in Level 1 areas, and the state agencies and the county governments have been working together to encourage and enable these developments. However, there are concerns to consider.

State and counties have noted the impacts these sites will have on transportation infrastructure, local environment, and quality of life. Large amounts of truck traffic are hard on our highways and the local roads within towns and residential communities such as Middletown. The new Route 301 highway just west of Middletown seems primed to attract this type of development in the near future, which was not the intent when that road was built just a few years ago. Large truck traffic can also cause additional delays to commute times and add a large amount of congestion in general. These costs are part of a fair give-and-take for improving the state's economy, but they are factors that should be considered when these large developments are approved.



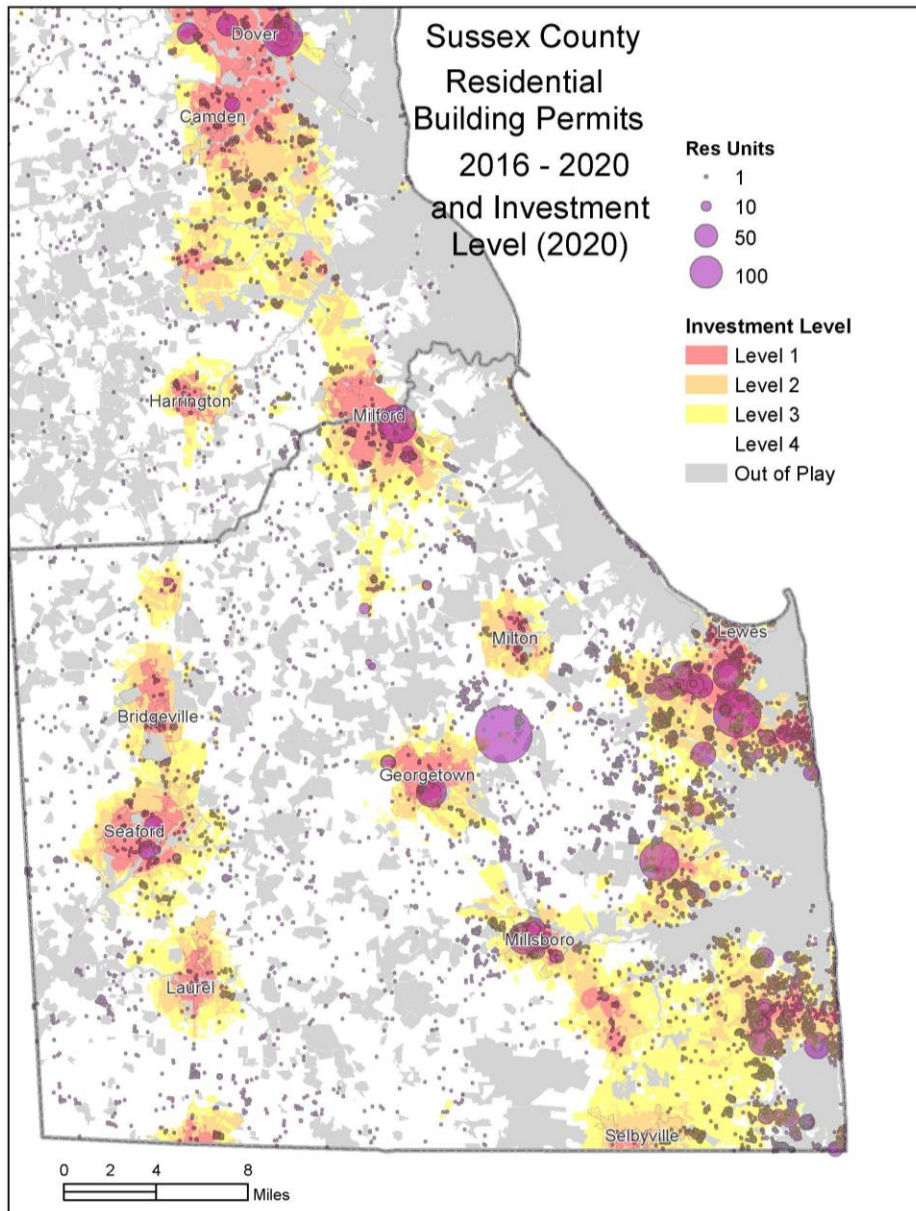
**Figure 3. New Castle County non-residential building permits, 2016–2020, and 2020 State Strategies Investment Levels**



The second major trend is the development of coastal Sussex County. Any native Delawarean will have been aware of this for at least a decade, but what might be surprising is how much this development has increased in recent years. Residential home builders have found a niche market in coastal Sussex County of retirees and others looking for vacation homes. New development and new construction of mostly high-end homes is a good thing for the state on the surface, as new residents with expendable income move into the state and support local economic growth, but there are long term costs and concerns for the state to consider. For example, without master plans and funding

programs in place, this piecemeal development will greatly increase the delay for infrastructure projects due to increased competition for funding.

**Figure 4. Sussex County residential building permits, 2016–2020, and 2020 *State Strategies* Investment Levels**



For starters many of the new residents moving to coastal Sussex are retirees or near retirement age, which is not a concern in and of itself, but a highly concentrated population of residents over the age of 65 does bring with it potential costs. Elderly residents often require and demand public services such as access to quality medical care, transportation options, and access to other community services such as senior centers and libraries. Additionally, many of the new residents moving to coastal Sussex County

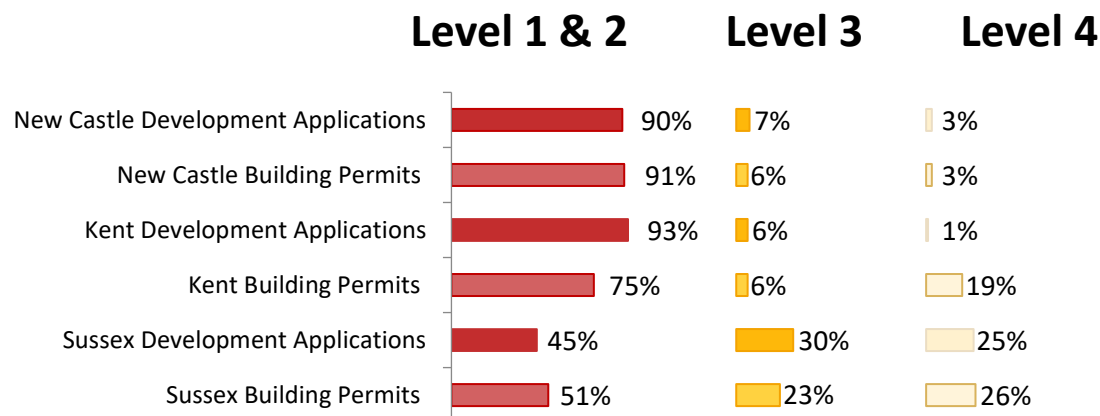
are coming from places in states such as Maryland, Pennsylvania, and New Jersey that provide more local public services than long-time residents of Sussex County are accustomed to, such as public transit options, trash removal and other municipal services, and parks with amenities. As these new residents age, the likelihood that they will demand improved public services from the county and the state will increase. Also, and more importantly, many of the new homes that have been built for these new residents have been specifically targeted toward a population that is over the age of 60.

It will be important for the state and local governments to understand that this current migration of baby boomer generation retirees will not last forever. What becomes of these new communities 20 or 30 years down the road? How long will these new residents stay in these homes, and who will move into these communities if many of these new residents leave in 15 to 20 years? The development of Coastal Sussex has already occurred in an unplanned manner, despite efforts to create effective plans at the state and local level primarily through the County's Comprehensive Plan, the Preliminary Land Use Service (PLUS) process, and *State Strategies*. Due to the nature of these recent developments and their likely impact on state and county budgets, the state and the county should work together to plan for efficient, thoughtful, and sustainable land use.

The final major trend highlighted for this report, and the most important for the state to consider, is the continued development within Level 4 areas of Sussex County. As the report outlines every year, the *State Strategies* levels are designated based on a variety of factors using GIS mapping tools, but the purpose is to ensure that the state encourages development that is both beneficial and sustainable for the state in the long term. The focus of the policies for Investment Level 4 is to protect rural and environmentally sensitive areas of the state, not only to preserve our agricultural industries, the rural character of many areas, and the local ecosystem in those areas, but also because developing in an unplanned manner in areas without needed infrastructure and access to key resources is costly to the state's economy in the long term.

Sussex County has continued to allow the development of rural areas in the County, which is inconsistent with state policies outlined in this report. This is happening for three primary reasons. First, Sussex County is experiencing tremendous pressure by private developers in rural (Level 4) areas. Second, the majority of the county's rural land area is zoned AR-1, which allows two dwelling units per acre and is commonly referred to as "by-right" development. Third, there are not enough incentives to direct these developers to areas that are more prepared to accept the development, such as Levels 1 and 2 areas. Under the current system, the cost of developing these areas will be taken on primarily by the state as new roads, infrastructure, and services are needed. The need for expanded road capacity will be extremely costly but necessary to accommodate the development of these Level 4 areas. In many rural areas, it is too late to prevent these costs as they have already been developed or are already planned for development. However, the state must begin planning for the long-term impact that this development will cause once all the construction is completed and new residents have moved into Sussex County.

**Figure 5. Residential development, proportion by *State Strategies* level, by county, 2015–2020**



Additionally, the risk of severe flooding and major storm damage has grown significantly because of a lack of planning for development in Level 3 areas and excessive development in Level 4 areas. Whether the state is hit by a major storm, which experts predict is inevitable at some point within the next few decades, or by the gradual loss of our beaches and the increased frequency of flooding, the environmental toll that this development is having is almost unmeasurable. The state and the county need to collaboratively address these issues and the associated costs to plan for the future of Sussex County.

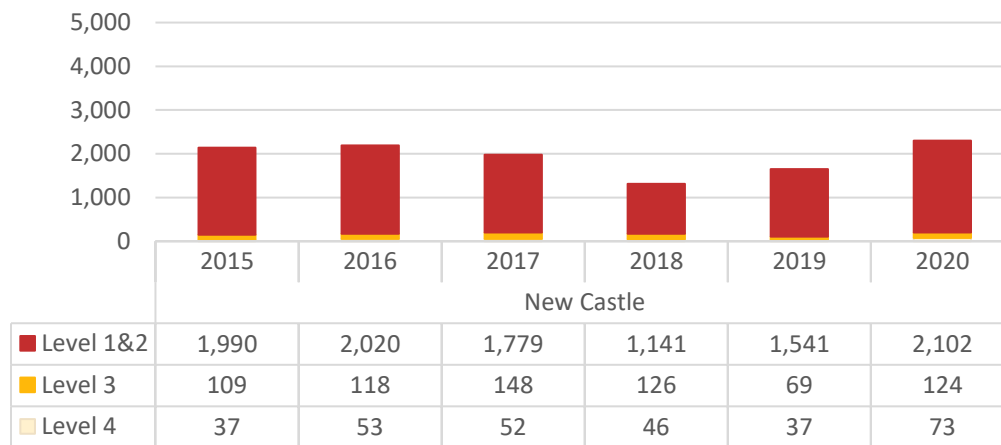
It is not too late to make the investments needed. Policy changes need to be made to protect the agricultural industry as well as environmentally sensitive unincorporated areas of Sussex County. Additionally, the state and county need to become more effective at directing more of this growth into Level 1 and 2 areas and away from Level 4 areas to manage the long-term cost to the state and county. A recent success story is the Henlopen Transportation Improvement District (TID). The TID is a partnership between Sussex County and the Department of Transportation (DelDOT) to plan for growth in the Lewes and Rehoboth Beach areas and to develop a transportation infrastructure funding program to support it.

Fortunately, we already have the 2020 State Strategies for Policies and Spending and the Sussex County Comprehensive Plan to guide us in managing and directing anticipated growth. Sussex County and state government should build on the Henlopen TID example and implement other TIDs and/or master planned areas that are consistent with the State Strategies. The goal is to make master-planned areas more attractive to landowners and developers by offering incentives that encourage growth in these areas. These actions could have the natural effect of directing the growth away from rural (Level 4) areas. By taking the recommendations made in the maps and policies within these documents seriously and making policy changes according to those documents, many of the negative impacts of this new growth can be effectively mitigated.

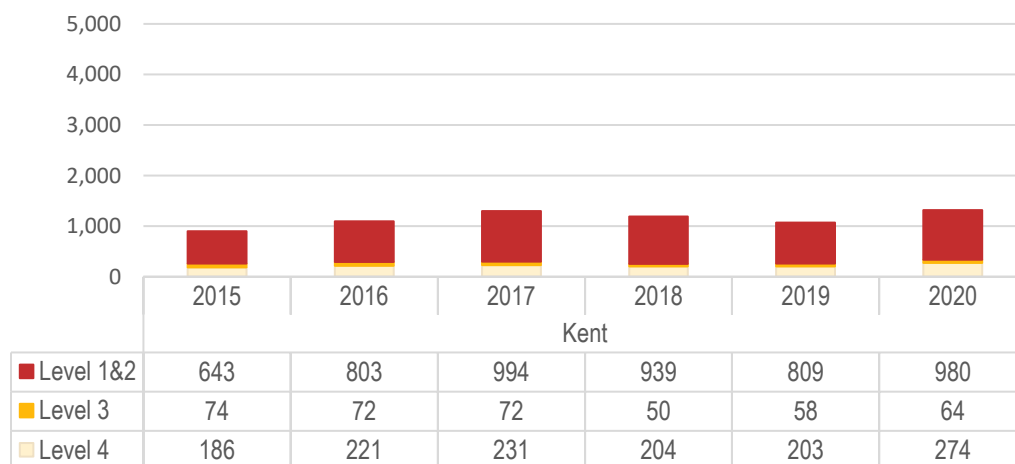


**Figure 6. Residential building permits proportion by *State Strategies* level, by county, 2015–2020**

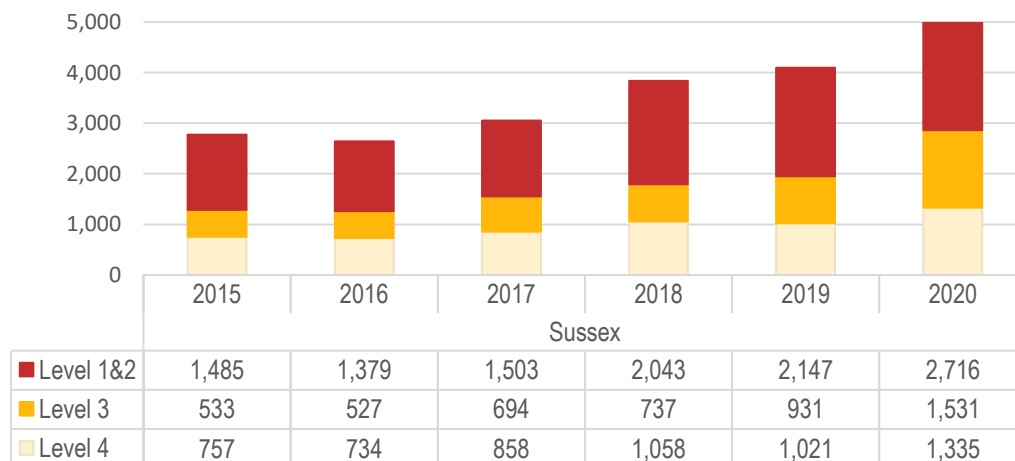
**Residential Building Permits, New Castle County**



**Residential Building Permits, Kent County**



**Residential Building Permits, Sussex County**



# *Strengthening Delaware's Economy*

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*Promoting the establishment and expansion of high-quality employment opportunities in sectors such as science, technology, banking, and finance has been a State goal for many years. See below for highlights of a few of these initiatives to attract business and industry, improve infrastructure, and increase cultural and ecotourism opportunities.*

## *Support for Small Business*

The Division of Small Business (DSB) continues to support Governor Carney's mission of assisting Delaware's small business community. The Division has four regional business managers dedicated to providing resource connections to Delaware's small businesses and entrepreneurs. DSB also provides contingency and collaborative support to the Delaware Prosperity Partnership in their marketing and outreach efforts as they lead Delaware's economic development initiatives. Specific initiatives that DSB would like to highlight are featured below:

### *Delaware Relief Grants*

Delaware Division of Small Business, in collaboration with Governor Carney and Office of Management & Budget, disbursed approximately \$176,000,000 in CARES ACT funding to over 4,000 of Delaware's small businesses to assist them in funding expenses that were specifically related to the coronavirus disease 2019 (COVID-19) Pandemic. These funds helped businesses to pivot into new business delivery systems and sometimes into new products and services that generated Revenue throughout the various stages of the pandemic and recovery. Throughout Fiscal Year 2022, Division of Small Business will perform reconciliations of the Delaware Relief Grants. Any business and/or majority business owner that may

*The Delaware Division of Small Business disbursed ~ \$176,000,000 in CARES ACT funding to over 4,000 of Delaware's small businesses for pandemic-related expenses.*

have spent the funds on a disallowed cost will be required to repay the grant, as required by the U.S. Treasury.

### *Rise Up Now, Delaware, Loan Program*

Delaware Division of Small Business, working in collaboration with Governor Carney and Delaware's Congressional Delegation, submitted a proposal to the U.S. Economic Development Administration (EDA) to create a new Revolving Loan Fund targeting small businesses (2–99 employees as of March 13, 2020) with a minimum annual revenue of \$12,500 on or before March 13, 2020. The objective was to provide low-cost loans to small businesses that could demonstrate viability prior to the pandemic and an ability to remain viable post-pandemic, but for whom the financial impact of the pandemic resulted in financial ratios that would prevent the business from qualifying for traditional lending. Research suggests that most small businesses need at least 12 months to become cash flow positive following major disasters. Therefore, the Rise Up Now, Delaware, (RUN-DE) Loan program offers 12 months of deferral on monthly payments and a 10-year amortization at below-market interest rates. The Revolving Loan Fund was funded at \$1,500,000 through EDA in April 2021 and within the first three months, Division of Small Business provided 10 small business loans up to \$50,000 each to five small businesses in Sussex County, one in Kent County, and four in New Castle County.

### *National Main Street Center's Statewide Coordinator— Delaware on Main*

Delaware Division of Small Business serves as the statewide coordinator for Delaware on Main, the National Main Street Center's national program that is based on core principles of preservation and revitalization of main streets and commercial corridors. Delaware currently has four fully accredited main street programs operating in Dover, Wilmington (Downtown Visions), Milford, and Rehoboth Beach. There are six affiliate communities in Delaware including Middletown, Delaware City, Smyrna, Seaford, Georgetown, and Laurel. Delaware on Main also provides resources to other communities that do not currently meet National Main Street criteria as an affiliate or accredited member including Cornerstone West CDC/Wilmington, Harrington, Old Brandywine Village/Wilmington, Milton, and Newark. Resources provided include quarterly meetings to share best practices, training, and membership resources available through the National Main Street Center.

### *Delaware Economic Development Authority*

Delaware Division of Small Business, as a division operating under the Department of State, is home to the Delaware Economic Development Authority (DEDA). Staff of the Authority is tasked with reviewing prospective projects to determine whether the goals and outcomes of the projects align with the purposes set forth in Delaware law, including whether they contribute to the prosperity, health, or general welfare of the citizens of Delaware. Throughout Fiscal Year (FY) 2021, DEDA continued to work in collaboration

with the Governor, Delaware Prosperity Partnership, Delaware Department of Transportation, Department of Finance, and the members of the Council on Development Finance to provide financial analysis and transparent public hearings throughout the pandemic using video conferencing and electronic communications.

## *Transportation Infrastructure Investment Fund*

The Transportation Infrastructure Investment Fund (TIIF), an initiative announced by Governor John Carney in 2019, completed two rounds in the first year of accepting applications and awarding grants for infrastructure projects.

This fund was established to provide economic assistance for renovation, construction, or any other type of improvements to roads and related transportation infrastructure to attract new businesses to Delaware, or expand existing businesses, when such an economic development opportunity would create a significant number of direct, permanent, quality fulltime jobs.

The TIIF was funded with \$5 million from the state's general fund and \$5 million from DelDOT's budget in both FY 2020 and FY 2021. The fund is managed by the TIIF Council, a nine-member council established by the legislation with seven appointments made by the governor. The council will consider applications and make funding recommendations to Delaware's Transportation Secretary and the Secretary of State.

The first round had nine applications. Seven projects were awarded grants totaling \$7,498,900 to support the creation of 1,314 jobs and the retention of 1,143 jobs.

The second round had seven applications. Six projects were awarded grants totaling \$7,785,043 to support the creation of 6,992 jobs and the retention of 1,802 jobs.

More information on TIIF can be found at <https://deldot.gov/Business/subdivisions/index.shtml?dc=tiif>.

## *Delaware Bayshore Program*

### *Delaware Bayshore Program*

The Delaware Department of Natural Resources and Environmental Control (DNREC) Delaware Bayshore Initiative continues to highlight the Delaware Bayshore region to promote the protection, conservation, and restoration of Bayshore habitats; enhance public access to lands and waters for outdoor recreation while raising awareness about the Bayshore's natural, cultural, and historic resources; and increase community engagement by investing in Bayshore communities and encouraging ecotourism, volunteerism, and stewardship.

In April 2021, Governor John Carney, DNREC Secretary Shawn M. Garvin, DelDOT Secretary Nicole Majeski, Director of the Delaware Tourism Office Liz Keller, and representatives from Delaware Greenways and tourism groups celebrated the formal announcement and new designation of the Delaware Bayshore Byway as a National Scenic Byway at the Delaware National Estuarine Research Reserve's Saint Jones Reserve. This designation launches the Delaware Bayshore Byway as the main travel



corridor through the Bayshore region. The Bayshore Byway connects northern river communities including New Castle, Delaware City, Port Penn, St. Georges, Middletown, Odessa, Smyrna, Leipsic, Little Creek, and Dover, as well as the northern beach communities of Woodland Beach, Pickering Beach, and Kitts Hummock, with the southern communities including the municipalities of Frederica, Milford, and Milton with spur roads to Bayshore beach communities such Bowers, South Bowers, Slaughter Beach, Broadkill Beach, and Lewes. Additionally, the Byway directly connects nine state wildlife areas, two state parks, two National Estuarine Research Reserves, and two National Wildlife Refuges to communities, residents, and visitors.

In FY 2021, the Delaware Bayshore Initiative completed several projects within the Bayshore Region with a focus on habitat restoration, climate adaptation, and outdoor recreation. Examples are listed below by county.

### *New Castle County*

- **Augustine Wildlife Area**—Bayshore funds directly contribute to the establishment of early successional meadow habitat, wetland buffers, and upland reforestation on two recently acquired parcels bordering the Thousand Acre Marsh. These efforts, along with invasive species control, will improve the quality of the habitats of Thousand Acre Marsh and support a broad diversity of plants and animals in one of Delaware's largest freshwater wetland systems.
- **Augustine Wildlife Area**—Bayshore funds contribute to the restoration of the habitat adjacent to the Port Penn Lang Wetland. Debris and soil remediation is underway to remove materials that may negatively affect the wetlands. Wildflower meadow and shrub/scrub habitat will be established to return the area to vibrant coastal impoundment ecosystem. Upon completion, a new trail and boardwalk are planned from the Route 9 parking area to the dike surrounding the wetlands to provide pedestrian access for hunting, wildlife viewing, and hiking.

### *Kent County*

- **Little Creek Wildlife Area**—Motor vehicle access within the Main Tract of the wildlife area has been improved by adding crushed stone to approximately one



mile of dirt roadway in 2020, creating a more durable road surface that requires less long-term maintenance and reduces dust created by moving vehicles.

- **Ted Harvey Conservation Area**—The Initiative continues to develop plans for two new wildlife viewing platforms in the Ted Harvey – Logan Lane Tract with anticipated construction in early 2022.
- **Town of Bowers Beach**—Bayshore funding, in addition to a Division of Climate, Coastal and Energy Strategic Opportunity Fund for Adaptation grant, resulted in the completion of the Bowers Beach Watermen’s Park, revitalizing a portion of a derelict parking lot and creating new greenspace and community parking in October 2021. A second phase of the project is underway, funded by the Delaware Bayshore Initiative, to create another acre of greenspace within the remainder of the lot, install major drainage improvements by creating wetland swales along the perimeter of the lot, and resurfacing the remaining paved surface for boating and fishing access in the Town of Bowers with construction completion anticipated in early 2022.

### *Sussex County*

- **Town of Slaughter Beach:** The Delaware Bayshore Initiative provided two grants to the Town of Slaughter Beach. The first partly funded the design and installation of interpretive panels at each beach access point within the town to promote stewardship of the sensitive bay beaches and educate the public about our rich Bayshore natural resources. These were successfully installed in September 2020. A second grant was awarded to the town in January 2021 to partially fund a study of the accumulation of detritus along the north end of the shoreline at Slaughter Beach that is degrading important shorebird and horseshoe crab habitat, creating challenges for invasive species control, limiting public access and other concerns. This funding is being used to produce a report to describe how the material is accumulating, short-term actions to remove the debris, and long-term recommendations to address the problem in the future.



*Bowers Beach Watermen’s Park was converted from a derelict parking lot to a new greenspace and community parking in October 2021.*

# *Building Strong Communities*

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*Communities are strengthened by providing incentives for infill development and redevelopment, reducing crime and blight, and preparing for emergencies and a changing climate. Numerous projects and programs are underway to help our communities thrive economically and be resilient in the face of changing conditions.*

## *Local Comprehensive Plans*

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*. Since September 2021, the Governor has certified eight comprehensive plans: Bellefonte, Elsmere, Delmar, Frankford, Millsboro, Selbyville, Georgetown, and the City of New Castle.

The OSPC is currently working with thirteen municipalities and one county that are in the process of updating their plans. In the next year, there are three municipalities that should begin their comprehensive plan updates and two municipalities that are at their five-year mark, which means they will review their plan to determine if changes need to be made. Appendix D outlines the planning activities of all the municipalities and the counties over the past year.

## *Downtown Development Districts*

The Downtown Development District (DDD) program seeks to revitalize the downtown Central Business Districts in selected city, town, and county areas using economic and other incentives.

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 works closely with the Office of the Governor and the Delaware State Housing Authority (DSHA) to implement the program. The OSPC's role is to manage the application and review process for district designations, monitor 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. The OSPC relies heavily on input from partner agencies during the



designation process and thereafter. In addition to DSHA, subject matter expertise was provided by the State Historic Preservation Office, DNREC, and DelDOT.

There are twelve designated DDDs:

| <b>Downtown Development Districts</b>                                 | <b>Designation Date</b> |
|---|-------------------------|
| <b>Wilmington, Dover, and Seaford</b>                                 | January 2015            |
| <b>Smyrna, Harrington, Milford, Laurel, and Georgetown</b>            | August 2016             |
| <b>Delaware City, Clayton, Middletown, and the City of New Castle</b> | August 2019             |

The designated municipalities offer a local incentive package that works in concert with the DDD rebate to encourage investment in each district. 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.

### *Downtown Development District Rebate Program*

The rebate continues to be extremely successful. Since early 2015, there have been 235 projects completed and placed in service. These projects have used \$19.4 million in state DDD funds to leverage \$312 million in private investment. The total pool of projects completed and reserved represent \$42.9 million in state DDD funds leveraging \$838 million in private investment.

The largest percentage of projects have been for residential (52%), followed by commercial projects (25%) and mixed-use projects (23%). A majority of these projects (68%) have been for the rehabilitating of existing buildings, with the remaining 32 percent of projects being new construction. 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 have a value that cannot be calculated in monetary terms.

In FY 2021, \$10 million in state funds were reserved for 17 large projects and are expected to leverage \$250 million in private investment. In addition, 58 small projects and 5 large projects were completed in FY 2021 receiving a total of \$2.6 million. Altogether, approximately \$12.6 million in DDD funds leveraged \$271 million in private investment. The FY 2021 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 funded projects, please visit the DDD Story Map online here: <https://bit.ly/2tDoWml>. Please see Appendix F for more detailed information about DDD rebate funds.

### *DDD Resource Team*

The Division of Small Business, working in collaboration with Delaware State Housing Authority and the OSPC continue the successful engagement of Retail Market Answers (RMA) to assist Downtown Development District administrators in attracting new development. To guide the work of the consultant, staff from all three agencies meet monthly with RMA to:

- Ensure agreement regarding implementation of services.
- Review and discuss issues arising from RMA's field observations.
- Communicate progress with respective agencies.
- Manage and communicate expectations of services with districts.
- Ensure services are aligned with DDD program objectives.

With RMA's extensive economic development skillset, this format has been very effective, and resulted in strong collaboration among the agencies. This includes new opportunities for collaborating on challenges facing districts or 'collective opportunities.' RMA work tasks include:

- Providing audit findings and market reports to inform districts on implementing business retention and recruitment strategies.
- Coaching existing and potential developers and business owners in partnership with district administration officials.
- Conducting vacant and under-utilized property inventories to proactively engage district staff and property owners in mutual planning and identifying assistance needed to move properties to a shovel-ready status.
  - Dover provides an excellent example as their initial 2019–20 inventory was streamlined in 2020–21 and has become the primary working tool for communicating with property owners and defining mutual goals to address issues that are preventing the property from moving forward. Once barriers are removed, the properties are incorporated into larger inventories such as the one maintained by the Delaware Prosperity Partnership.
  - This new streamlined version is being shared with other DDD staff working on inventories to focus and streamline their activities as well.
- Developing an integrated DDD website template for each DDD community. While the template is standardized, there is enough flexibility to allow each community to promote their unique content. So far, the Resource Team created a webpage template ("proof of concept" for Clayton and Dover). This template was favorably reviewed by all the DDD communities.
- Creating training resources for different audiences on various topics, such as training specifically for elected officials of districts and visual resources to better understand Historic Preservation Tax Credits and DDD Rebates.

## *State Historic Preservation Tax Credit Program*

Delaware's [Historic Preservation Tax Credit Program](#) assists in preserving and rehabilitating historic buildings throughout Delaware. Applicants may be eligible for tax credits for qualified rehabilitation work on properties that are listed in the National Register of Historic Places or are certified as contributing to a listed historic district. The state historic preservation tax credit is often used in conjunction with other federal and state incentive programs.

Currently, the State Historic Preservation Office (within the Division of Historical and Cultural Affairs) is authorized to award up to \$8 million in credits each fiscal year through state FY 2027. At the beginning of each fiscal year, a certain amount of these credits is reserved for different types of projects, including those within DDDs. Credits are awarded based on a percentage of the qualified rehabilitation costs. The percentage varies with the type of applicant. Projects that are also eligible for the Low Income Housing Tax Credit (LIHTC) program, managed by the Delaware State Housing Authority, may receive additional historic preservation tax credits. Listed below are some key tasks completed in this fiscal year:



*The John Bell House in Dover was standing in 1787 when the Constitution was ratified at the Golden Fleece Tavern, just across The Green.*

- In FY 2021, all \$8 million in available historic preservation tax credits were awarded. Projects included rehabilitation of owner-occupied, nonprofit-owned and income-producing properties located across the state. Five of these projects are within DDDs.
- The legislature amended the Historic Preservation Tax Credit Act to extend the effective date of the program through June 30, 2030.
- The Division is currently working with the Department of Technology and Information to develop requirements for a new system that will modernize the application process and facilitate workflow management.

## *Climate Resiliency and Adaptation*

Since 2014, eleven 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. Some of these efforts are summarized on the following page.



## *Resilient and Sustainable Communities League*

With growing urgency for more resilient communities in the face of worsening natural hazards and climate change, the Resilient and Sustainable Communities League (RASCL) emerged in 2015 as a network of state agencies, nonprofit organizations, and academia that ensure that resiliency building services offered by its members align with and meet the needs of Delaware's local governments. RASCL's mission is to "support all Delaware communities in taking the necessary actions to thrive in the face of changing environmental conditions through collaboration, information sharing, and technical assistance." Members meet quarterly to network, share information, and coordinate service delivery.

This year, RASCL also completed its first five-year strategic plan (<https://www.derascl.org/strategic-plan>). Feedback was collected from members and stakeholders through surveys, listening sessions, and informational interviews on multiple occasions between 2019 and 2020. This feedback detailed core issues related to resilience and sustainability facing Delawareans and key priorities and strategies for addressing those issues. Ultimately, this information was synthesized into a plan that not only refined the scope and core mission of the collaborative, but also outlined new committees and processes that will help RASCL expand its services and better achieve its mission. RASCL has established new committees which are currently developing work plans. In addition to the overall Steering Committee, committees as identified in the five-year strategic plan include:

- Outreach and Events Committee
- Community Planning Assistance Committee
- Resilient Project Implementation Committee
- Hazards and Preparedness Committee
- Science and Research Liaison Committee

## *The RASCL Group Includes Representatives from...*

- Center for the Inland Bays
- Delaware Center for Environmental Monitoring and Analysis
- Delaware Department of Natural Resources and Environmental Control
- Delaware Department of Transportation
- Delaware Division of Public Health
- Delaware Emergency Management Agency
- Delaware Forest Service
- Delaware Geological Survey
- Delaware Interfaith Power and Light
- Delaware League of Local Governments
- Delaware Nature Society
- Delaware Sea Grant
- Delaware Sustainable Energy Utility
- Delaware Voluntary Organizations Active in Disasters
- Green Building United
- Office of State Planning Coordination
- Partnership for the Delaware Estuary
- The Nature Conservancy Delaware
- University of Delaware Coastal Resilience Design Studio
- University of Delaware Institute for Public Administration
- University of Delaware Water Resources Center
- University of Maryland Environmental Finance Center

On December 9–10, 2020, RASCL held its fourth annual summit, this time virtually due to COVID-19. The annual summit 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 2020 summit was *Expect the Unexpected: Planning with Uncertainty*. Presenters shared information about best practices and lessons learned from a year that included an unprecedented pandemic and Tropical Storm Isaias that spawned a record-breaking tornado. Participants attended virtual sessions on economic resilience strategies, understanding community resilience in the context of social vulnerability, and tips for managing compounding events. Over 200 people attended the event, representing more than 18 municipalities, state and federal government, local communities, academia, and private companies. The 5th annual summit is tentatively planned for December 7–8, 2021.

In 2021, RASCL formed a coalition of members and outside partners to improve resilience planning capacity in the City of Milford and the Town of Slaughter Beach. RASCL, the municipalities, and their coalition were awarded a \$220,000 National Coastal Resilience Fund grant from National Oceanic and Atmospheric Administration and the National Fish and Wildlife Federation. It is the first time RASCL applied for and was awarded federal grants on behalf of communities. This two-year project will include the completion of an economic evaluation of the ecosystem and natural features within the Mispillion and Cedar Creek Watersheds and a vulnerability assessment of critical assets. Together, these products and stakeholder engagement will inform a nature-based investment strategy that will outline ecotourism, restoration, and other investments that support resilience to flooding and land use changes along with local economic opportunity. The first phase of the economic study is being released in late July 2021; work is commencing on the vulnerability assessment and Phase 2 of the study. Project partners include RASCL member organizations including DNREC, as well as the City of Milford, the Town of Slaughter Beach, Sussex and Kent Counties, and The Pew Charitable Trust.

RASCL members continue outreach efforts through informal “Coffee Hours.” Typically held in each county, the event moved to virtual meetings due to COVID-19 restrictions. The Coffee Hours share programmatic updates, emerging new ideas, and funding available for assisting with planning and implementation of adaptation and mitigation projects. This year, RASCL held the virtual Coffee Hours on the following dates:

- June 25, 2020
- September 28, 2020
- February 26, 2021
- April 27, 2021

In addition, RASCL unveiled a new electronic newsletter called the News Digest this year. The News Digest contains important announcements from RASCL members, new research, reports and upcoming webinars. It is designed to curate information in one place to support information sharing throughout the membership and stakeholder

network. In the coming year, RASCL will continue to expand its recruitment of members and services, particularly as the new committees mature and begin to execute their work plans.

### *Sustainable Communities Planning Grant*

The DNREC Division of Climate, Coastal, & Energy wrapped up existing grants (grant cycle 2017–2020) for the Sustainable Communities Planning Grant Program. Planning for a new grant cycle is currently underway. 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, the work being completed will provide concrete examples of what communities throughout the state can do to prepare for the impacts of climate change. The Sustainable Communities Planning Grant program awarded five grants, totaling \$245,000, to local governments to develop community sustainability or resiliency 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 have completed the requirements of the grant. They developed sustainability and/or resiliency goals through outreach and educating residents, assessed vulnerabilities, and completed other specific planning activities. They established partnerships with nonprofit, community, and quasi-governmental organizations to 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.

Several towns have already begun implementing their plans. Frederica, for instance, hosted its first community farmers’ market on June 6. The market will continue to run through Summer 2021. A focus of Frederica’s sustainability plan is the local food system, and specifically attracting and maintaining more local sources of food so that residents

don't have to drive several miles outside of town for fresh produce. Having a farmers' market in town was identified as a highly desirable goal by the community survey that was developed and implemented for the sustainability plan.

Fenwick Island has also begun implementing its sustainable community plan. To increase their resiliency to flooding, they have begun the process of conducting a drainage review and updating drainage maps. Drainage and flooding issues was one of the key areas of concern that were identified based on the data collected for the sustainability plan.

Newark has also made strides in implementing their community sustainability plan. They have taken a systematic approach by developing tracking sheets and reporting their progress to the Conservation Advisory Commission, which has been tasked with monitoring and encouraging progress toward the goals laid out in the plan. Among many of their accomplishments so far, Newark has formed an Energy Transition Commission as envisioned in the sustainability plan, developed revisions to the provisions in the zoning code for green building practices as recommended in the plan, and funded the city's energy efficiency solar project to install solar panels on city buildings and improve energy efficiency.

### *Christina/Brandywine River Remediation Restoration Resilience*

For more than a decade, DNREC's Watershed Approach to Toxics Assessment and Restoration (WATAR) team has focused on projects targeting reduction of toxic contaminants in the Christina River and Brandywine Creek watersheds. The team consists of experts and assets from the DNREC Division of Waste and Hazardous Substances – Remediation Section, the Division of Watershed Stewardship – Watershed Assessment & Management Section, and the Division of Climate, Coastal and Energy – Delaware Coastal Programs Section. Collaborative projects focus on identifying sources of bioaccumulative and toxic compounds, reducing or eliminating their loading to surface waters, and determining the extent of impact to human health and the environment.

Known as the Christina/Brandywine River Remediation Restoration Resilience (CBR4) project, WATAR implemented this river-scale initiative to coordinate remediation, restoration, and resiliency efforts. The primary goal is achieving fishable,

#### *The CBR4 Team Comprises Staff from...*

- American Rivers
- Brightfields, Inc.
- Christina Conservancy
- DNREC Division of Climate, Coastal and Energy
- DNREC Division of Waste and Hazardous Substances
- DNREC Division of Watershed Stewardship
- Delaware Nature Society
- Partnership for the Delaware Estuary
- Sarver Ecological
- Additional assistance to engage local community residents in the planning process is provided by Collaborate Northeast and the South Wilmington Planning Network.

swimmable, and potable water in the project area within the shortest timeframe possible. The project area includes the Christina River from Interstate-95 (east of Newport) to the mouth at the Delaware River, and the Brandywine Creek from the Amtrak Northeast Corridor to the mouth at the Christina River.

CBR4 success will take multiple years to achieve and will require the efforts of various partners as project funding becomes available.

The current phase (2021 through 2022) includes two initiatives advancing simultaneously: development of a conceptual site model and a sediment remediation feasibility study for the lower Christina and Brandywine Rivers. The conceptual site model will help to identify and prioritize any remaining upland sources of contamination. The feasibility study will determine the best approaches and technologies to remediate contaminant sources in sediment and evaluate potential costs. The results of the studies will be used to identify locations for possible restoration and coastal resilience implementation projects.

American Rivers and the Christina Conservancy were awarded a two-year grant from the National Fish and Wildlife Foundation in the fall of 2020 to engage with experts, the public, and stakeholders to create a long-term remediation, restoration, and resiliency plan for the lower Christina and Brandywine rivers. The plan will provide both a vision for a future Christina-Brandywine Riverfront that thrives economically and environmentally, and a blueprint to guide decision-making and leverage resources.

In 2021, the CBR4 project additionally accomplished general outreach activities, informal outreach to communities within the project area, a stakeholder webinar, and a project website.

### *Resilient Community Partnership*

The Resilient Community Partnership (RCP), administered by the Delaware Coastal Management Program, leverages federal funding provided by the National Oceanic and Atmospheric Administration to help Delaware communities improve their planning and preparation capabilities for responding to coastal and climate hazards.

The 2021 RCP is being conducted in collaboration with the University of Delaware Institute for Public Administration, the City of Lewes, and Delaware Coastal Programs. This RCP is focused on assisting the City of Lewes to address coastal environmental challenges and hazards. As an important first step in the process, the University of Delaware Institute for Public Administration hosted three listening sessions on June 8, 9, and 10, 2021, to better understand the concerns of the City of Lewes community members. Delaware Coastal Programs supported these listening sessions by providing technical assistance and hosting an online survey containing the same questions. The current RCP project will assist the city in developing an ordinance that will result in greater community resiliency.



## *Housing*

Quality, affordable housing is a necessary and desirable asset for any neighborhood. Demand for rental housing is incredibly high in Delaware, with the state having one of the lowest rental vacancy rates of all its neighbors. Delaware renters increasingly stretch their budgets to afford rent and utilities, and the impacts of COVID-19 on the incomes of the lowest-income households only exacerbated an affordable rental housing crisis. The Delaware State Housing Authority (DSHA) provides programs to help Delawareans obtain housing, coordinates with local homeless providers, and collaborates with public and private partners to support the revitalization and redevelopment of Delaware's communities.

DSHA offers several programs to help Delaware households to achieve homeownership. The flagship Homeownership Loan Program (HLP) assisted 2,289 Delaware households to purchase a home in calendar year 2020.

For those in the rental market, 1,401 low-income households were assisted with public housing units or vouchers. DSHA helps create and preserve affordable rental housing by offering federal and state financing for new construction and rehabilitation of affordable housing. The primary federal tool for this is the Low-Income Housing Tax Credit program (Housing Credit), which is leveraged by state investments in the Housing Development Fund (HDF). Through these tools, four projects with 196 units were created or preserved in FY 2021, including two projects creating supportive housing for special populations.

To more broadly address community revitalization, the DSHA administers both the Strong Neighborhoods Housing Fund (SNHF) and the Downtown Development District rebate program. The SNHF has distributed \$14 million, which leveraged \$44 million in private investment. The Downtown Development District program continues to be active, and in FY 2021, \$12.5 million in state funds leveraged projects totaling \$270 million throughout the designated districts. Please see Appendix B for the more detailed metrics.

## *Public Safety*

In Delaware, the Delaware State Police (DSP) plays a very important role in protecting Delaware's citizens. The DSP provides specialized policing and investigative services to all of Delaware's other police agencies. In addition, the DSP 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 FY 2021, the budget for the DSP was approximately \$151.5 million. Additionally, the State currently provides 30 percent of the funding that the counties use to provide their jurisdictions with paramedic service. This percentage remains the same as the previous year. The State's portion equals approximately \$13.9 million for FY 2021. Additional details can be found in Appendix B of this report.

# *A Healthier Delaware*

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*To improve Delawareans' health outcomes and their quality of life, it is important to start addressing the quality of the environment in which we live. To start, state agencies, local governments, and communities can change the design of communities and transportation systems, promote access to healthy foods, increase opportunities for exercise, and collect data to track outcomes.*

## *Planning Healthy Communities*

A healthy community design incorporates a mixture of land uses, transportation options, parks, medical services, and recreational opportunities. The OSPC has collaborated with many state agencies and other partners on ways to make Delaware a healthy place to live, work, and play. The following are brief summaries of some current activities in healthy community planning.

### *Division of Public Health COVID-19 Response*

DHSS played an integral role in Delaware's response to the COVID pandemic. The Division of Public Health (DPH) built a strong and widespread testing system that continues to provide options for Delawareans and is ranked in the top 10 of states on a per-capita basis. DPH also instituted a robust contact tracing program that employs over 400 people to identify positive cases and alert their close contacts of potential exposure. A mobile exposure notification app, COVID Alert DE, was also implemented to provide Delawareans another tool during the COVID-19 pandemic.

In December 2020, DPH began the largest public health response in Delaware's history when Phase 1A health care workers received the first doses of a COVID-19 vaccine. Today, efforts continue to distribute the vaccine quickly, efficiently, and equitably throughout the state.

As of July 15, 2021, the State of Delaware and its partners have administered 1,034,119 doses of the COVID-19 vaccine. Among Delawareans 12 years and older, 516,065 have received at least one dose of the COVID-19 vaccine, and 460,420 Delawareans are fully vaccinated. Delaware is in the top 20 states in the nation for vaccinations. We have accomplished this through building off our statewide infrastructure of partners including pharmacies, hospital systems, and specialty care providers, in addition to mass vaccination events held at the Dover International Speedway and Delaware Motor Vehicle sites in Delaware City, Dover, and Georgetown. DPH and county-based community

coalitions are hosting as many as 90 community vaccination events a week in addition to stable vaccination sites in pharmacies, hospitals, medical provider offices, and DPH clinics.

In tandem with our public health response, DHSS Divisions worked to provide critical support to our clients including:

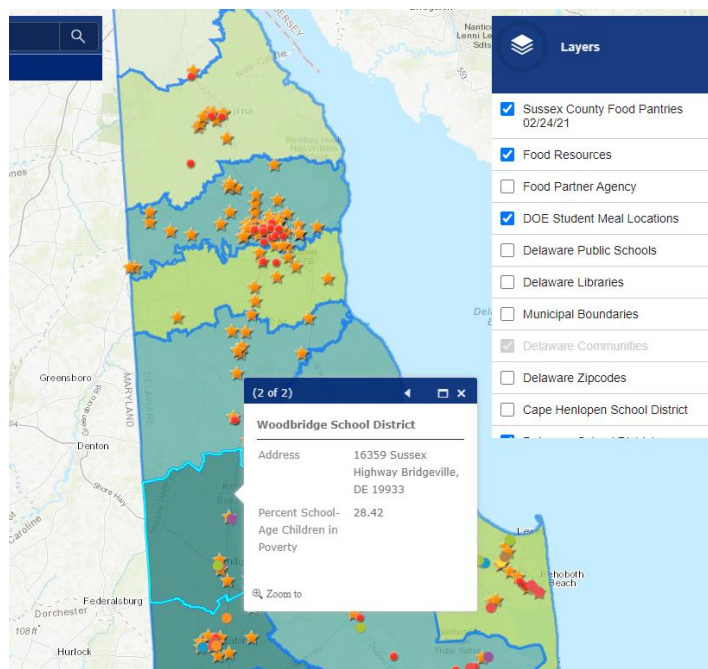
- Housing supports for individuals and families who were homeless.
- Food for people who were isolating or quarantining because of COVID-19.
- Food benefits to Delaware families who lost their jobs or had their household incomes greatly reduced.
- Behavioral health supports through mobile bridge clinics for Delawareans who struggled with the emotional and mental impact of the pandemic.
- Online applications and phone or virtual appointments to continue Medicaid coverage, child support payments, support for seniors or individuals with disabilities, and other DHSS services.

The DHSS Office of the Secretary and Division of Management Services partnered to create and implement the Delaware Health Care Relief Fund. This allowed for the approval of 182 applications in 9 distinct categories and distribution of approximately \$49 million in funds to health care providers and community partners to relieve financial stressors from the pandemic.

### *Council on Farm and Food Policy*

The Council has collaborated more than ever with state agencies, university partners, and community organizations to strengthen the use of data to inform our understanding of vulnerabilities, food related challenges, and decisions to address them.

Working with the University of Delaware's Institute for Public Administration and state partners, the Council established a Statewide Food Resources Map. Updated data of food distribution sites, retail locations, population demographics, and other information will be hosted centrally on the Delaware FirstMap website. Information will be accessible to state agencies, community organizations, and others. The Council is also collaborating to create a Food Security Data Dashboard as part of the Delaware Integrated Data System.



The planning phase of the Community Healthy Food Retail Initiative was successful. The Council, University of Delaware Cooperative Extension SNAP-Education Program, and the

Division of Public Health, with consultant Upstream Strategies LLC, started the pilot phase of this initiative and will work with residents in two communities, Dover and Harrington. More information can be found online here: [Delaware Council on Farm & Food Policy](#).

In May, the Council hosted the third annual Farm and Food Planning and Networking Seminar. A virtual meeting bringing together speakers, panelists, and participants spanning county and municipal government; institutes of higher education; local farmers; and community organizations. Council members are addressing two key takeaways from the seminar: guidance to better manage food security and strengthening the producer-consumer environment.

### *Senior Farmers' Market Nutrition Program*

The Delaware Department of Agriculture initiated a Senior Farmers' Market Nutrition Program (SFMNP) that is designed (1) to provide fresh, nutritious, unprepared, locally grown fruits, vegetables, honey, and herbs to low-income seniors; (2) to increase the local consumption of agricultural commodities by expanding farmers' markets and on-farm markets; and (3) to aid the development of new farmers' markets and on-farm markets. Through the SFMNP, eligible residents over the age of 60 receive vouchers, distributed through senior centers, to purchase products from Delaware farmers at 13 farmers' markets and 12 on-farm markets.



Delaware's SFMNP began as a pilot program in 2018 and expanded to statewide operation in 2019. The 2021 program results are promising with \$50 vouchers distributed by 20 senior centers to 600 eligible seniors (\$30,000 total) for the June to October season. The number of participating markets has increased each year and every participating market has re-applied for participation the following year. Participating seniors, senior centers, and farmers have been appreciative and enthusiastic about the program. Some senior centers have scheduled bus trips to provide seniors easy access to farmers' markets and on-farm markets.

### *Healthy Communities Delaware*

**Healthy Communities Delaware (HCD)** is a collaborative initiative aiming to improve health, well-being, and equity in low-wealth Delaware communities. Healthy Communities Delaware works in partnership with communities to address resident priorities around the social determinants of health—conditions into which we are born, live, learn, work, and age. Many Delawareans lack the basic resources for health and well-being—safe and healthy homes, a quality education, meaningful employment, a healthy

environment, access to healthy foods, financial stability, and reliable transportation. HCD and partners aim to improve this through accelerating development of healthy, safe, and vibrant communities.

During 2020, HCD invested \$723,000 in nine geographic communities across the state. As of June 30, 2021, another \$611,000 was granted, over half of the projected \$1 million total for 2021. Work was conducted through 12 community-based organizations or coalitions. The investments in these communities are addressing issues ranging from environment and community vitality to housing and food security. These projects help to address long-standing issues of inequity and disinvestment and increase the opportunity for aligned investment from other public and private sources.

To support state efforts related to the COVID response, HCD facilitated distribution of over \$3 million in CARES Act funding for populations and communities that were disproportionately impacted by the pandemic. The HCD infrastructure provided an existing mechanism through which to disseminate the funding, reaching populations in need quickly.

Continued funding for Healthy Communities Delaware was allocated by the legislature in the FY 2022 budget. In the coming year, HCD will continue to engage Delaware residents, organizations, and businesses to identify the transformative strategies, structures, and steps it will take to ensure every Delawarean lives in a community where they have the opportunity to achieve optimal health and well-being. The OSPC participates as a member of the HCD Leadership Team, providing input and guidance to the organization. To learn more, visit [www.HealthyCommunitiesDE.org](http://www.HealthyCommunitiesDE.org).

### *My Healthy Communities Delaware Data Portal (Delaware Environmental Public Health Tracking Network)*

**My Healthy Community (MHC)** is Delaware's population-health and environmental-public-health tracking network. The platform delivers neighborhood-focused data on a myriad of population health areas such as social vulnerability, community characteristics, the environment (e.g., public and private drinking water, air quality), chronic diseases,

#### *Community Investment Focus Areas*

- Equitable COVID-19 response and recovery
- Organizational capacity building
- Social Determinants of Health
  - Community vitality
  - Environment
  - Healthy food access
  - Housing
  - Job creation & workforce development
- Basic Needs
  - Food security
  - Resource navigation

#### *Community Investment: The Numbers*

- Over \$1.3 million in HCD community investments
- 9 communities receiving funding through 12 community-based organizations
- 6 jobs created



mental health and substance use, healthy lifestyles, maternal and child health, health care utilization, and infectious diseases. It contains at least 10 broad areas of population health with 55 subcategories including data sources such as Delaware’s vital records (births and deaths), surveys such as the Behavioral Risk Factor Survey and Youth Risk Behavior Survey, hospitalization and emergency department visit data, prescription drug monitoring data, U.S. Census, and Centers for Disease Control and Prevention (CDC) social vulnerability index, to name a few. Launched on May 13, 2019, the innovative technological showpiece allows users to navigate data at the smallest geographical area available to understand and explore factors that influence health. Since the May 2019 launch, the site has had over 3,080,064 users, and since January 1, 2020, has had over 15,621,609 pageviews.

In April 2020, the site also became Delaware’s COVID-19 dashboard, presenting statistics on COVID-19 cases, hospitalization, emergency department visits, testing, deaths, vaccination, contact tracing, and in-person contagious school cases and serves as a vital tool for Delaware residents to stay abreast of the COVID-19 situation in local communities. Delaware is the first state to provide Health Insurance Portability and Accountability Act (HIPAA) compliant COVID-19 data at the neighborhood level. MHC continues to expand in data—with new indicators added regularly—and in functionality to effectively support communities to track outcomes of implementing data-driven population health interventions. In 2020, DPH created a story map highlighting data on Delaware’s opioid crisis as a tool for Delaware residents to more readily interpret substance use disorder data in a meaningful way. COVID-19 data from MHC are disseminated in embeds that are in use by the state, city, and local jurisdictions. Aggregate data presented on MHC are publicly available in a downloadable csv file format. Inclusion of community profiles and the incorporation of new indicators, story boards and maps, and intervention specific data at the community level are planned projects for continued expansion of MHC.

To ensure compliance with HIPAA, not all data can be made available at the community level; therefore, the system is designed to provide data for the smallest geographic area possible. Access the *My Healthy Community* data portal at [www.MyHealthyCommunity.dhss.delaware.gov](http://www.MyHealthyCommunity.dhss.delaware.gov).

### *Delaware Cancer Consortium Cancer Risk Reduction Committee Healthy Lifestyles Subcommittee*

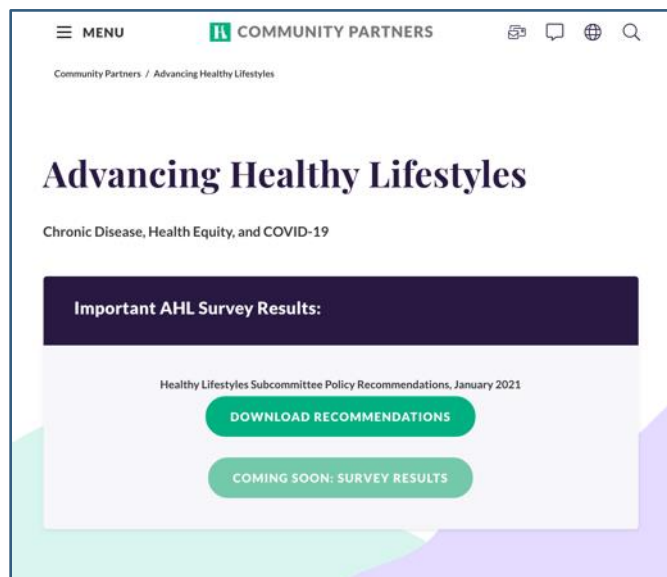
**The Delaware Cancer Consortium (DCC)** is the Governor-appointed body created to establish, guide, and monitor measurable goals and targeted health interventions focused on reducing cancer incidence and mortality in the state. The actions of the Healthy Lifestyles Subcommittee (HLSC) of the Cancer Risk Reduction Committee (CRRC) of the DCC continues to advance via the Advancing Healthy Lifestyles (AHL) program in the Division of Public Health’s Physical Activity, Nutrition and Obesity Prevention Program (PANO). Launched in February 2021, the AHL work provides support for the 14 policy

recommendations established by the HLSC and began this support by soliciting stakeholder input via surveys, World Cafes, and workgroup meetings to develop data driven action steps to help prioritize the implementation of the recommendations. The CRRC is chaired by the Honorable Lieutenant Governor Bethany Hall-Long and Deborah Brown, Chief Missions Officer of the American Lung Association. The CRRC supports goals that emphasize cancer prevention, education, and building healthier communities that embrace healthier choices and conditions where people live, learn, work, worship, and play.

The goal of the AHL program is to reduce the prevalence of adult and childhood obesity and other chronic diseases by promoting healthy lifestyles and improving health outcomes for Delawareans—with a health equity lens on every aspect of the program. The AHL program implements targeted evidence-based interventions to help families and children have access to healthy, affordable foods and safe places for physical activity—which are promising strategies to address Delaware’s obesity epidemic. The AHL program objectives encompass the development and implementation of policy, system, and environmental (PSE) strategies that will help Delawareans engage in regular physical activity, better nutrition, and make intentional lifestyle changes, lowering the risk of developing heart disease, cancer,

chronic lower respiratory disease, diabetes, and other chronic diseases. The AHL’s work is categorized into three pillars: 1) coordinated school health and wellness, 2) community capacity building that supports physical activity, nutrition, and obesity related planning and interventions; and 3) workplace/employee wellness to create system change and to influence organizational culture and policy.

The AHL initiative is an essential component to building a transformed society and facilitating statewide health prevention efforts—now and beyond the current health crisis. The COVID-19 pandemic has unveiled significant health, social, and economic burdens in our state and globally. PANO is using the AHL program structure and component areas as pillars to support PSE change programming that is more targeted, equitable, and sustainable and will yield improved long-term health impacts in Delaware. For more information, visit: [www.healthydelaware.org/Community-Partners/Advancing-Healthy-Lifestyles](http://www.healthydelaware.org/Community-Partners/Advancing-Healthy-Lifestyles).



## *Outdoor Recreation Parks and Trails Program*

The Outdoor Recreation Parks and Trails (ORPT) Program provides matching funds for projects like open space acquisitions, trail construction, playground installation, and planning/design. A change to the program was implemented this year to address social

equity and further expand the reach of the program, increasing the match amount from 50 up to 75 percent under either of the two new categories. This higher funding level is designed to spur investments where they are needed most by lessening the cost share for communities with limited capacity and resources. First, the Social Equity category supports projects in high socially vulnerable census tracts (as identified by the CDC Social Vulnerability Index). The second category, New Sponsors, is for those municipal sponsors that have not received funding in the program's 33-year history. This matching grant program helps facilitate local outdoor recreation investments serving the public, and in 2020, awarded grants to twelve park projects and six trail projects, totaling nearly \$945,000 in funding allocated. The 2021 application phase is currently in progress with awards scheduled to be announced in the Fall. More information is available at [www.de.gov/ORPT](http://www.de.gov/ORPT).



*Ribbon cutting for the Town of Townsend's combination tennis and pickleball court Townsend Municipal Park.*

# *Conserving Agricultural, Natural, and Cultural Resources*

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*The character of Delaware is linked to its agricultural roots, natural resources, and historic charm. Clean water is a necessary component of thriving communities and integral to supporting healthy ecosystems. Conserving these resources is essential to the quality of life residents deserve and fosters eco and cultural tourism opportunities. Some efforts to achieve these goals are summarized below.*

## *Open Space Program*

The Land Protection Act of 1990 (7 Del. C. Ch. 75) created the Open Space Program. This Act also created a Delaware Open Space Council to advise DNREC's Secretary on all matters relating to the administration, implementation, and financing of the Open Space Program. State agencies eligible to participate in the Open Space Program include DNREC's Divisions of Parks and Recreation and Fish and Wildlife, the Delaware Forest Service, and the Division of Historical and Cultural Affairs are the state agencies eligible for funding under this program.

In FY 2021, the Open Space Program funded 10 projects, protected 422.9131 acres, and spent \$5,621,045. That figure represents a combination of Open Space funds, leveraged federal grant money and private funds.

In FY 2021, the Open Space Program received \$10 million in funding. The Open Space Council has approved 13 future projects yet to go to settlement leaving an anticipated balance of \$3,633,124.

## *Agricultural Preservation*

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 continue to be threatened by population growth, land development, and "suburban sprawl." In FY 2021, the program preserved 45 farms and 4 forestland properties comprising 3,700 acres using a combination of state, federal, local, and other funds



totaling \$9 million. To view the data dashboard and online map of Agricultural Preservation in Delaware visit <https://agriculture.delaware.gov/agland-preservation-planning/reports/>.

## *2020 Delaware Forest Assessment and Action Plan*

Delaware Forest Service conducted a Delaware Forest Assessment and Action Plan that identifies goals and objectives for rural and urban forestry for the next 10 years. Urban forest goals include increasing urban and community forests that are sustainably managed, connecting people to trees, and engaging them in stewardship activities. The plan also identifies “urban priority areas” to focus urban forest management efforts.

### *Urban and Community Forestry*

In 2020, the Delaware Forest Service made a pledge to protect, plant, and conserve one million trees over the next 10 years, joining dozens of public and private organizations as part of the World Economic Forum’s global 1t.org initiative. Kesha Braunskill, Delaware’s urban and community forestry coordinator, was named to the U.S. Stakeholder Council of 1t.org—a prestigious group that includes representatives from the U.S. Congress, Fortune 500 Corporations, and natural resource agencies such as the National Arbor Day Foundation and American Forests.



*Delaware’s Urban & Community Forestry Coordinator, Kesha Braunskill, and Delaware’s Urban Forester, Taryn Davidson*

### *Education*

In addition to the Annual Arborist & Tree Care Seminar, the program provided educational programs at the Delaware Nature Society’s DuPont Environmental Education Center in Wilmington geared toward high school students with an interest in forestry.

### *Urban & Community Forestry Grants*

The Urban and Community Forestry Grant Program is a competitive grant for municipalities, homeowner associations, and nonprofits. Since 2000, it has provided \$1.85 million for 588 grants and over 16,000 trees have been planted.





## *Tree Stewards*

In 2020, a Tree Stewards program launched to bring training and resources to Delaware citizens who want to improve their neighborhood landscapes. The first Tree Stewards program was successful and included planting events in Milton and two New Castle County Parks.

### *Focus Funding project – Haynes Park*

The Urban and Community Forestry Program partnered with Gathering of the Saints, a Wilmington book club, and the



City of Wilmington to host a tree planting event at Haynes Park. A total of 16 trees were planted to replace mature trees that were lost to tornados during storm Isaias.

## *Division of Historical and Cultural Affairs*

### *Delaware State Historic Preservation Plan for 2018–2022*

The Delaware State Historic Preservation Plan helps guide citizens, organizations, and agencies working together to preserve Delaware’s heritage for the future. The 2018–2022 plan outlines strategies and specific actions under six broad goals, which include enhancing relationships among government programs, encouraging inclusion of historic preservation as a best practice in landscape and community planning, and making the best possible information on Delaware’s historic resources widely available.

The current plan also focuses on developing tools and information needed to help guide growth and change in ways that sustain and enhance the state’s character and quality of life, of which Delaware’s historic properties and cultural landscapes are an essential part.

*Partners in Preservation: Planning for the Future, Delaware’s Historic Preservation Plan 2018–2022*, is available online at: <https://history.delaware.gov/wp-content/uploads/sites/179/2019/02/2018-2022DelawareSHPOPlan.pdf>.

### *Strategic and Master Planning*

The Division of Historical and Cultural Affairs (DHCA) is engaging staff and stakeholders to develop a new five-year strategic plan for the agency. Working with the Delaware Alliance for Nonprofit Advancement, DHCA conducted online surveys, a virtual town hall meeting, and stakeholder surveys to gain an understanding of the needs of the communities it serves. Analysis of this information and work toward drafting the new plan continues in FY 2022.

DHCA also continued to build on existing initiatives to develop and implement master plans for the Cooch's Bridge Historic Site and the John Dickinson Mansion, working with the Friends groups associated with these properties. Stakeholder meetings were held for the Cooch's Bridge Historic Site, for which potential connections with the Cooch Dayett Mill property along Old Baltimore Pike are being studied. The Friends group is also engaged with broader discussions concerning trails and paths in the Newark/Iron Hill area.

For John Dickinson Mansion, planning continues for the construction of a new visitor center; repairs to existing structures; and building several new trails. These plans will be informed by archaeological investigations undertaken at various locations on the property. In March 2021, these investigations identified an unmarked burial ground, believed to be final resting place for enslaved men, women, and children, and free African Americans who died on the site (see article posted on HCA's website, <https://history.delaware.gov/2021/07/12/never-to-be-forgotten-or-lost-again/>). The discovery highlighted the efforts already underway to amend the state's law protecting unmarked burials. The legislature passed amendments which, among other things, further defines how communities may be engaged to help determine appropriate treatment of such sites.

More information on DHCA's initiatives may be found in its annual report for 2020:

<https://history.delaware.gov/wp-content/uploads/sites/179/2021/04/2020-Annual-Report-8th-compressed-1.pdf>

### *National Register of Historic Places*

The [National Register of Historic Places](#) is the official federal list of the country's historic places that are deemed worthy of preservation. Buildings, structures, archaeological sites, districts, and objects can be nominated for the National Register. The SHPO assists property owners, local governments, and other partners in their efforts to prepare nominations. Nominated properties are reviewed by the Delaware State Review Board for Historic Preservation, and if applicable, by a board or commission within Certified Local Governments (CLGs) with preservation programs, to determine if properties are eligible for listing. The Keeper of the National Register (within the National Park Service) makes the final determination on listing a property.

Listing is voluntary and does not impose restrictions on what the owner can do with the property. However, some local governments adopt historic preservation ordinances to encourage protection and appropriate rehabilitation of listed buildings and districts. Projects receiving federal assistance are reviewed for their effects on properties that are listed in, or eligible for listing in, the National Register. Properties listed in the National Register may be eligible for state and/or federal historic preservation tax credits. Currently over 760 nominated properties have been listed in the National Register,

including over 10,200 resources. In FY 2021, two properties were newly listed in the National Register of Historic Places:

- October 19, 2020 – American Vulcanized Fibre Company – Wilmington Plant
- January 25, 2021 - St. Nicholas Ukrainian Catholic Church (Wilmington)

Due to COVID-19, the Delaware State Review Board for Historic Preservation continued to hold virtual meetings, providing the opportunity for the public to participate in the National Register nomination process.

## *Water Resources*

In addition, the state and its agencies invest significant financial resources toward improving water quality by maintaining and upgrading water and wastewater infrastructure.

Community Water Quality Improvement Grants provide a source of funding for municipalities, nonprofit and community organizations, and homeowner's associations to improve water quality through environmentally sound and cost-effective projects. In FY 2021, \$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 FY 2021, \$822,134 in state funds were paired with \$1.2 million in federal funds for a total of nearly \$2.2 million for this program.

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 to protect the environment. Local governments or private utility companies most often construct and operate these systems. The State, through the Water Pollution Control Revolving Funds, provides the funding to assist utility providers to update these systems. In FY 2021, over \$2.8 million in state and federal funds were made available to a range of utility providers statewide.

Drinking water infrastructure is a critical public health investment that must keep pace with a growing population and economy. It is vitally important that public drinking water systems be maintained to provide Delawareans this necessity. Local governments or private utility companies most often construct and operate these systems. The State, through the Drinking Water State Revolving Fund, provides funding for public water systems to assist in constructing these vital assets. In FY 2021, over \$16.8 million in loan funds were distributed to a range of water providers throughout the state.

# *Better Schools for All Delaware Children*

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*Access to quality education is one of the foundations of a learned society. The following data, policies, and initiatives help ensure that capacity exists to educate Delaware's children and that schools are in a community setting with adequate infrastructure.*

## *Education*

Delaware has 19 local school districts and 23 charter schools. All Local Education Agencies (LEAs) receive funding from the State for both capital and operating expenses. Funding for schools has increased to address areas of growth in Delaware and implement equity strategies. The State spent approximately \$1.64 billion on public school operating costs in FY 2021, roughly a third of Delaware's total General Fund budget.

## *Student Enrollment*

Due to the COVID-19 pandemic, enrollment in public schools decreased in FY 2021 after having increased each year since the 2015–16 school year. The school year 2020–21 student enrollment was 137,956. These figures include students in charter schools, which receive operating funds but not capital funds from the state.

## *School Site Selection*

The OSPC works closely with the Delaware Department of Education (DDOE), Office of Management and Budget (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 and the directors of OMB and the OSPC must approve the site.

## *Environmental Education*

In April, the Delaware Forest Service hosted a virtual conference focused on supporting Outdoor Learning Spaces on school grounds across the state. Engagement was high from classroom teachers, environmental educators, and natural resource providers with 85 participants.



The Delaware Forest Service also formed the Outdoor Learning Network (OLN), a statewide network of classroom teachers, environmental educators, and natural resource providers dedicated to developing, enhancing, and using outdoor learning spaces with the objective of getting students outdoors. To support this, the Delaware Forest Service created the Outdoor Learning Spaces Story Map to highlight projects throughout the state and help interested schools. The team is encouraging a full push to complete a survey, where responses will be used to power the story map and are intended to identify gaps in resources. This can be found by searching Delaware Outdoor Learning Spaces on [arcgis.com](https://arcgis.com) or visiting: Delaware Outdoor Learning Spaces.



*This signage at Slaughter Beach, Delaware illustrates the active Delaware Shorebirds and explains ways that visitors can help protect the birds and their nests.*

# *Planning for Connectivity & Mobility*

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*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 are higher than ever.*

Local governments, state agencies, and regional transportation organizations must work closely together to maximize transportation efficiencies and options. This section highlights these coordinated efforts.

## *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 populations 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 support local government comprehensive planning and redevelopment activities.

In Delaware, there are three MPOs. The Wilmington Area Planning Council (WILMAPCO) covers New Castle County as well as Cecil County, Maryland. The Dover/Kent County MPO covers all of Kent County. 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 completed their MTP in March 2019 (<http://www.wilmapco.org/rtp/>), Salisbury/Wicomico MPO completed their MTP in December 2019 (<https://www.swmpo.org/planning-documents>), and the Dover/Kent MPO completed their MTP in December 2020



(<https://doverkentmpo.delaware.gov/innovation-2045/>). The OSPC and DelDOT both have roles in communicating local government priorities to MPO staff.

## *Non-Metropolitan Planning Coordination*

The majority of Delaware is covered by an MPO planning area, but most of Sussex County is not designated as an urbanized area and is therefore not covered by an MPO. The “Consultation Process for Non-Metropolitan Locally-Elected and Appointed Officials” is the document that describes how DelDOT coordinates planning for this non-metropolitan area.

### *Consultation Process Updates*

The “Consultation Process for Non-Metropolitan Locally-Elected and Appointed Officials” is required to be reviewed and updated by DelDOT every five years. The document was last updated in 2016 and is scheduled for an update by the end of calendar year 2021. DelDOT is revising the document throughout the summer of 2021 and will open the document up for a 60-day public comment period.

### *Sussex County Long-Range Plan*

The Consultation Process describes DelDOT’s commitment to produce a Long-Range Transportation Plan (LRTP) for Sussex County. DelDOT began developing a completely new LRTP for Sussex County in spring 2021. The development process will take approximately one year, and a final draft is expected in spring/summer 2022. A crucial piece of this new LRTP will be a fiscally constrained project candidate list. This will bring Sussex County’s LRTP in alignment with the MPO long range plans. This process improvement will provide the residents of Sussex County with a more predictable source of projects for upcoming CTP development cycles. For updates, visit [ctp.deldot.gov](http://ctp.deldot.gov).

## *Transportation 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 by making government more efficient, promoting economic development, and, in general, improving the quality of life for Delaware citizens.

### *Master Planning Progress*

#### *Ongoing*

- **City of New Castle Transportation Plan**—WILMAPCO, DelDOT, and the City of New Castle are developing this Plan to update the 1999 City of *New Castle Transportation Plan* and will further analyze issues raised in the 2009 *City of*

*New Castle Comprehensive Development Plan.* The study area includes the entire municipality and will consider transportation transitions to surrounding areas within New Castle County as appropriate. This plan seeks to improve the multimodal transportation network, identify flooding and sea-level rise impacts for future study, improve gateways to the historic city, develop a shared-parking analysis, and more.

A Public Workshop was held in February 2021 to seek public feedback and ideas about traffic, connectivity, bicycling and walking, transit, parking, freight, and flooding. More information about this plan can be found here:

<http://www.wilmapco.org/cityofnewcastle/>.

- **Churchman's Crossing Plan**—The Churchman's Crossing area continues to be a vitally important economic growth area for New Castle County and the State of Delaware with its location along the I-95 Corridor between Newark and Wilmington. Significant commercial and employment centers are found in Churchman's Crossing, which was formerly known as the "Edge City" of Metroform.

WILMAPCO, DelDOT, and New Castle County Department of Land Use are developing a comprehensive update to the 1997 Churchman's Crossing Plan. The current Churchman's Crossing Plan Update will include new recommendations on transportation improvements, land use strategies, and transportation demand management (TDM) strategies. The third public workshop was recently held in June 2021, where the project team presented results of the analysis and transportation alternatives, initial project recommendations, as well as potential implementation strategies along with other recommendations for the area. The Churchman's Crossing Plan Update has an anticipated completion date of Fall 2021. More information about this plan can be found here: <http://www.wilmapco.org/Churchmans/>.

- **Union Street Reconfiguration and Streetscapes Improvement Study**—This plan is a community driven reconfiguration and streetscape concept study created by WILMAPCO, DelDOT, Delaware Transit Corporation (DTC), and the City of Wilmington to develop alternatives to improve Union Street's aesthetics and transportation configuration. Union Street is a one-way, southbound street that is paired with Lincoln Street (one-way, northbound) to the east as main thoroughfares with the Bancroft Parkway/Delaware Avenue, West Side, Southwest, and Browntown-Hedgeville Neighborhood Analysis Areas, serving the Canby Park, Flats, Union Park Gardens, and Little Italy neighborhoods.

A public visioning workshop was held in May 2021 to receive valuable public input from the local residential and business community on conditions, safety, and connectivity. More information about this study can be found here: <http://www.wilmapco.org/unionstreet/>.

- **Five Points Transportation Study**—Significant progress was made on this partnership between DelDOT and Sussex County in FY 2021. Thanks to the work of both agencies and the Five Points Transportation Study Working Group, which met four times over the past year, 54 of the study's 78 recommendations

(nearly 70%) are now complete or in progress. The public has also informed this process through comments at Working Group meetings and participation in two online public workshops in May of 2021. Progress highlights include traffic operational improvements on U.S. 9 at the Plantation Road connector, safety enhancements at crossovers on Route 1, and extension of the Georgetown to Lewes Trail.

The Working Group is also looking forward to the benefits that will come from major capital projects about to begin, including Plantation Road, Old Orchard Road, and the SR 1/Minos Conaway Road grade separated intersection. More information about this study can be found here:

<https://deldot.gov/projects/Studies/fivepoints/>.

- **Coastal Corridors Study**—The public input phase of this major study, which is focused on State Route 404 and State Route 16, began last winter with a stakeholder listening tour and continued in March 2021 with five public workshops. The primary purpose of these activities was to hear from the people who live, work, and play in the study area before considering any transportation improvements. Technical work, including crash analysis, intersection data collection and evaluation, and travel demand forecasting, is currently taking place. The results will be shared with the public in the fall of 2021.

The end product of this effort will be a comprehensive transportation needs study that will allow DelDOT, in collaboration with Sussex County, to establish a vision for these corridors and a phased set of improvements to address identified transportation needs. More information about this study can be found here: <https://deldot.gov/projects/Studies/404/>.

### *Completed*

- **Concord Pike Master Plan**—Completed in November 2020, the Concord Pike (U.S. 202) Corridor Master Plan was developed by WILMAPCO, DelDOT, DTC, and the New Castle County Department of Land Use to provide a 20-year vision of the area between the City of Wilmington and the Pennsylvania state line. This plan identifies cohesive land use and transportation strategies to ensure that Concord Pike will continue to be a safe, accessible, and economically thriving place for all.

Building upon the results of the 2017 U.S. 202 Market Assessment, this plan has multiple transportation and land use recommendations to promote economic growth, diverse land uses, access to jobs, public transit ridership, bicycle and pedestrian access and safety, environmental sustainability, and community vitality. More information about this plan can be found here:

<http://www.wilmapco.org/202-2/>.

- **Governor Printz Corridor Study**—This Governor Printz Corridor Study was conducted by WILMAPCO in partnership with the New Castle County Department of Land Use, DelDOT, DTC, Delaware Greenways, and key stakeholders to improve multimodal mobility, safety, and travel choices while supporting sustainable economic development and enhanced neighborhood

vitality. The corridor extends 6.1 miles from U.S. 13, Philadelphia Pike at the entrance to the Claymont Regional Transportation Center to E. 35th Street and Northeast Boulevard at the City of Wilmington line. Completed in January 2021, the study identified and assessed the feasibility of multimodal transportation projects to accommodate current and future transportation and land use needs, including roadway, transit, and nonmotorized travel including the East Coast Greenway. More information about this study can be found here: <http://www.wilmapco.org/governorprintz/>.

- **Newport Transportation Plan**—The Town of Newport Transportation Plan was developed by WILMAPCO, DelDOT, DTC, and the Town of Newport to recommend transportation and land use projects to better address roadway and multimodal transportation, traffic calming, pedestrian and bicycle transportation, and parking. The study area consisted of the Town of Newport and surrounding portions of New Castle County. This includes Boxwood Road to the north, Christiana River to the south, S. Dupont Road to the east, and Rothwell Drive to the west.

The plan also examined the impacts new development will have on the Town, so that the public and key stakeholders had the ability to give input on how the town would grow currently and in the future without sacrificing the transportation network. Analysis was conducted on environmental sustainability, bicycle and pedestrian connections, traffic management, economic stability, transit routes, and more. More information about this plan can be found here: <http://www.wilmapco.org/newport-transportation-plan/>.

- **Southern New Castle County Master Plan**—The Transportation Element of the Southern New Castle County Master Plan was completed in September 2020 by WILMAPCO with the New Castle Department of Land Use and DelDOT. The plan, which encompasses the entire area of New Castle County below the C & D Canal, builds on the works of previous plans, including the 2009 Infrastructure Master Plan and the 2003 Local Road Plan. This plan establishes a long-term vision for land use and infrastructure in Southern New Castle County based on sound planning principles and public input. Recommendations included various intersections and safety improvements, traffic signal coordination and optimization, additional transit routes and services changes, and more. More information about this plan can be found here:

<http://www.wilmapco.org/snccmp/>.

## *Transportation Improvement Districts*

A Transportation Improvement District (TID) is one 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. DelDOT is committed to encouraging the use of TIDs and implementing them in Delaware to improve land use and transportation coordination with local land use agencies. DelDOT has a principal planner whose fulltime job is to conduct outreach on TIDs, facilitate their development, and manage the implementation of TID infrastructure fee programs and monitoring programs. TID-related accomplishments are listed below.

## 2021

- **Henlopen TID**—The Henlopen TID in eastern Sussex County was officially approved, and the agreement between DelDOT and Sussex County was executed on October 30, 2020. Implementation is underway with four recent development proposals entering into TID agreements outlining participation commitments.
- **Southeast Milford TID and Newark TID**—Land use forecasts, traffic analysis, and identification of needed transportation improvements have been completed for the Southeast Milford TID, are being developed to implement the Southeast Neighborhood Master Plan, as well as the Newark TID. Milford City Council approved the revised service standards and list of improvements in May. Newark’s Planning Commission recommended approval of the service standards and list of improvements in July, with City Council review in August. Both TIDs are expected to have their infrastructure fee programs and monitoring programs finalized by the end of calendar year 2021 and transition into implementation in early 2022.
- **Cheswold Area, Little Heaven, and South Frederica TIDs**—Initial TID agreements to start the TID development process were executed this year for three TIDs in Kent County: Cheswold Area, Little Heaven, and South Frederica. The Cheswold Area TID is in the land use forecast stage. The Little Heaven and South Frederica TIDs are being developed to implement recently adopted master plans, with land use forecasts, traffic analysis, and identification of improvements already completed. Both TIDs are also expected to have their infrastructure fee programs and monitoring programs finalized by the end of calendar year 2021, to transition into implementation in early 2022.

## 2022

- **Southern New Castle County TID and Westown TID**—Comprehensive updates for both the Southern New Castle County (SNCC) and Westown TIDs are substantially complete, and updated land use forecasts and traffic analyses have concluded. Transportation improvement verification, updated cost estimates, and updated fee schedules are the next steps. Implementation has continued, with the completion of Shallcross Lake Road and a commitment from Breakthru Beverage to construct their portion of the Merrimac Avenue Extension to Levels Road.

- **Eastown TID**—Implementation of the Eastown TID in Middletown continues. The East Green Street Extension project, from Catherine Street east to Dickenson Boulevard is being constructed through TID contributions from both the New Castle County Library and Crossings at Silver Lake, and by the Town of Middletown completing the remainder of the alignment for reimbursement from the TID fund as fees are collected.

## *DelDOT Long-Range Transportation Plan*

### *Strategic Corridors*

DelDOT developed the Strategic Corridor Program as a comprehensive evaluation program to aid with long-term capital investment decisions, provide greater transparency and predictability to its stakeholders, and provide a guide for future economic decisions related to transportation with the State of Delaware. This program leverages existing data, connects with the Transportation Corridor Strategies (TCS) program, and uses routes identified in the 2019 Long-Range Transportation Plan (LRTP). Through the identification of safety and security, mobility, connectivity, and economic vitality metrics, this program centers around the importance of moving people, goods, and services throughout the State.

This program’s goal is to develop criteria that support a data-driven process to identify priority corridors.

Work on the program began in FY 2020, utilizing a data driven process to help explain the significance of the statewide corridors identified in the LRTP based on mobility, connectivity, and economic prosperity, identifying future LRTP needs and potential CTP projects.

- **Statewide Analysis** (formerly Phase 1) includes corridor identification and prioritization at a corridor-wide level throughout the state, identifying and weighting 17 criteria related to the mobility of people, goods, and services, and included traffic, planning, and land use metrics. This analysis, completed in FY 2020, culminated in the ranking of each corridor as having “high,” “medium,” or “low” significance to statewide mobility.
- **Countywide Analysis** (formerly Phase 2) evaluates specific corridor segments by county, using 33 criteria for a more in-depth analysis than what was done for the Statewide Analysis. Route segments were divided at critical points where overall character or Average Annual Daily Traffic (AADT) changes occurred. During FY 2020 and FY 2021, 13 corridors were evaluated on this level. Rating criteria ranged from traditional traffic operation metrics such as functional class, number of lanes, AADT, and crash information, to planning metrics such as Transportation Analysis Zones (TAZ), population, points of interest, environmental justice, and people connectivity.



- **Corridor Specific Analysis** (formerly Phase 3) will follow the completion of the Countywide Analysis and will eventually include recommendations from DelDOT and the project team for corridor improvements or further study as part of future LRTP and Capital Programming efforts. The first corridor specific analysis will take place in FY 2022 as a pilot study of a corridor selected by the DelDOT project management and consultant teams for the Strategic Corridor Program. This effort will provide the framework for future studies and analyses of a similar nature.

During FY 2022, the project team began developing a reporting document that summarizes findings to date. This effort's aim is to incorporate the technical analyses, information, and graphics in a usable and user-friendly format, for both internal and external messaging throughout the State of Delaware. This will support the eventual and overall project objective to develop an easy-to-use analysis tool that is intuitive for all DelDOT levels. Eventually, the project team also hopes to implement interactive GIS capabilities within the DelDOT system to indicate rankings for each corridor. This process was started in FY 2021 with the development of an ArcGIS Hub Site; work on this component will also continue as the project progresses.

### *Mileage-Based User Fee Pilot Program*

Delaware is the lead state for a pilot project to determine the feasibility of replacing the state fuel tax with a mileage-based user fee (MBUF). The main purpose of this pilot program is to provide a better understanding of how an MBUF might work in our region given the potential for out-of-state mileage and toll interoperability challenges. Three passenger vehicle pilots have been completed to date as well as the nation's first multi-state truck pilot.

The passenger vehicle pilots involved participants having a plug-in device—with or without location—installed in the vehicle's on-board diagnostic port to track mileage (one can choose the method). Mileage and fuel usage are then based on vehicle data obtained from the plug-in device. Location information is used to differentiate the mileage by the state in which the vehicle is driven and provides enhanced driver amenities. A mock monthly "invoice" is generated to show mileage traveled and what the MBUF would be based on those miles. The Phase 2 Passenger Vehicle Pilot Final Report was published in March 2021 and concluded that while change and privacy concerns are difficult obstacles to overcome, many of those that experienced the MBUF program understood its value and why it could be a funding mechanism of the future.

### *Capital Transportation Program (CTP)*

The Department of Transportation (DelDOT) is responsible for developing a Capital Transportation Program (CTP) every two years. House Bill 66 was signed into law in 2019,

changing the Capital Transportation Program (CTP) from an annual program to a biennial program. This means that DelDOT will be preparing an updated or revised “CTP” document every other year, instead of each year. The benefit of this is that, because the programmed schedule of CTP project investments has become fairly stable (and “unchanged”) in recent years, DelDOT is now able to develop more plans and studies with those resources that were being devoted to document preparation. Therefore, DelDOT can be more responsive to the state’s evolving transportation needs.

In addition to this administrative process change, in February 2020 DelDOT’s Council on Transportation (COT) adopted a revised “CTP Project Prioritization Process” to incorporate new factors that have emerged from federal and state planning guidelines, and to better utilize recent improvements in data collection able to support improved “data driven” decisions. Currently, DelDOT uses “Decision Lens” software to implement this enhanced prioritization process. This process includes factors for safety, system operating effectiveness, economic impact, social and health elements, and state and local priority. These changes resulted in an increase from 70 percent “quantitative” to over 77 percent. In addition, the *Delaware Strategies for State Policies and Spending* designations were incorporated into the new prioritization process.

Currently, DelDOT is operating under the FY 2021 – FY 2026 CTP. Development of the FY 2023 – FY 2028 CTP began in the spring of calendar year 2021 and will continue into 2022 with anticipated adoption by March 2022. The COT is responsible for reviewing and approving the final CTP each cycle.

The COT is also responsible for approving the prioritization process and were presented an update in December 2020 in preparation for the FY 2023 – FY 2028 CTP approval cycle.

A significant portion of funding for the CTP comes from federal surface transportation funding programs. As a recipient of federal funds, DelDOT is required to coordinate the planning process for both metropolitan and non-metropolitan areas.

## *Non-Motorized Transportation*

In 2021, DelDOT and DNREC developed a number of pathway, sidewalk, and roadway projects that continue to expand local cycling and walking opportunities for transportation and recreation. Milestone projects completed this year include the:

- Junction & Breakwater Pathway Rehoboth Extension
- Killens Pond Elevated Boardwalk
- Capital City Trail Phase II
- Milton Rail Trail Phase II
- Miller Road Streetscape Improvements
- Continuation of the Georgetown to Lewes Rail Trail to Cool Spring Road

The Pedestrian Access Routes (PAR) program's first open-end contract in New Castle County brought non-compliant sidewalks up to Americans with Disabilities Act (ADA) standards. Several bike lanes (approximately 17 miles total) have been added to roadways around the state. Pathways installed along the frontage of new subdivisions continue to add to our network of side paths, especially in Southern New Castle County and Eastern Sussex. Many urban streetscape projects were completed under the Transportation Alternatives Program (TAP) such as 9th Street and Walnut Streets in Wilmington. Beginning in 2021, the "Report a Pedestrian Issue" website actively resulted in a number of quick fix and maintenance responses, communication needs for enforcement, greater traffic assessment studies, and pedestrian safety outreach. Also starting in 2021, Level of Traffic Stress (LTS) Bicycle Network Planning was used to prioritize pathway projects in DelDOT's Bike/Pedestrian Program, adding a new quantitative tool to ensure that DelDOT funds projects which add the most transportation utility, by building "low-stress" bicycle networks focused on everyday cycling. This was a major goal set out in the 2018 Statewide Bike Plan. DelDOT continues to improve its standard operating procedures and project development process to leverage large capital projects to implement high quality bicycle and pedestrian transportation infrastructure.



*Streetscape improvements at 9th Street and Walnut Streets in Wilmington.*

### *FY 2021 Trail User Numbers*

- Georgetown to Lewes Pathway – 1,200 to 1,500 per day
- C&D Canal Trail – 8,00 to 1,000 per day
- Jack Markel Pathway – 500 to 600 per day
- Capital City Pathway – 300 to 400 per day

# *Data, Resources, & Collaborations*

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*Planning is most effective with accurate and up-to-date information, sufficient resources, and engaged partners. Public policy planning efforts at the state and local level rely on the data and collaborations summarized in the section below.*

## *Census State Data Center*

In 2020, the federal government conducted the Census. This occurs every 10 years and is the complete enumeration of the population. It is a very important process for numerous purposes both federally and at the state level. Among other functions data from the 2020 Census is used in:

- Congressional representation (both state and federal)
- Funding decisions (both state and federal)
- Transportation planning
- Environmental planning
- Demographic surveys and studies

Beginning in 2018 Delaware started to prepare for this year's Census with the creation of the Complete Count Commission (CCC). The CCC was created by Governor Carney in Executive Order 23. The CCC was tasked with getting as accurate a count as possible with special attention being paid to geographic regions and demographic populations that have historically been undercounted in previous Censuses.

During the nearly two years between the creation of the CCC and the conclusion of the census count CCC members drafted and approved a \$650,000 budget. These funds were used to provide education and outreach efforts to all Delaware citizens with a special emphasis placed on historically undercounted populations. These took the form of advertising in print, on the radio, digitally in a variety of social media platforms, and physical materials distributed to daycare centers and non-government members of the CCC.

The 2020 Census was the first Census to allow responses online. This was a substantial change from how the Census had been conducted historically. Previously, the Census was conducted only on paper. The online response option had no loss of service and no known

security issues. Response rates for the online option were in line with projections made by the Census Bureau.

Due to the health concerns created by COVID-19 the initial timeline that the federal government created for the Census were delayed. With populations like college students and seasonal residents not living where they traditionally have deadlines for response gathering were extended. Initial response rates indicate that Delaware captured a complete picture of residents.

Attention is now being turned to legislative redistricting. Delaware's House and Senate districts will have to be updated to reflect the new population numbers reported by the Census. Additionally, local units of government will be updating their own districts. As the State Data Center, the OSPC will be a resource for data to assist any legislative or executive body charged with redistricting.

## *Delaware Population Consortium*

The Delaware Population Consortium (DPC) provides the authoritative set of demographic and population projections for Delaware. These projections are vital to efficient and effective land use planning, economic development, school planning, and other state functions. The DPC provides updated projections every October and is in the process of collecting all the input data including the new 2020 Census data to provide updated projections for Delaware through 2050.

## *Geospatial Coordination*

Delaware has been using the Delaware Geographic Data Committee (DGDC) to coordinate geospatial technology in the state for over 20 years. The OSPC chairs the DGDC user group that was established to ensure the availability of geospatial data; promote the use and sharing of geospatial data, GIS software, and tools; establish data standards; and support the geospatial data providers and users in Delaware.

Geospatial Coordination has faced quite a few challenges. Delaware is one of a handful of states without a dedicated position for geospatial coordination. The geospatial needs of agencies have surpassed our available resources to provide coordination across all agencies. There is also a lack of funding for key data sets needed by all agencies.

The improvement of data integration and mapping is one of Governor Carney's GEAR initiatives. GEAR stands for Government Efficiency and Accountability Review Board which was established by Executive Order in February 2017. The OSPC has been tasked with evaluating how GIS is being coordinated in the state and is focused on identifying efficiencies and opportunities to reduce duplication. A study completed in 2021 by UD IPA indicated that Delaware should establish a Geographic Information Officer at DTI to oversee the vision and direction of geospatial technology and initiatives statewide. The OSPC has been coordinating with DTI on this solution.



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

- Delaware will be utilizing GIS Software and data to perform the legislative redistricting based on the 2020 Census data that was released in August 2021.
- FirstMap is the state's enterprise GIS solution that provides a repository for all agencies to publish their geospatial data. DTI's Location Intelligence team manages the solution and updates the software, technology, and data. DTI continues to migrate all the data into their updated FirstMap 2.0 environment.
- Geospatial Open Data is available through FirstMap.
- FirstMap continues to provide updates to Esri's Community Maps program to ensure authoritative Delaware specific data is being used worldwide.

## *State Land Inventory*

The OSPC has been tasked through the GEAR process to improve the current State Land Inventory process by establishing a centralized database with all state agency real property data. There was little to no reliable data on state-owned lands, with the exception of a couple of state agencies.

UD IPA assisted in 2019 by conducting research into state agency practices and procedures regarding real property and the data necessary to manage it. Their research included interviews with key agency personnel to gain insights into their use of this data and how their needs could be integrated into a centralized database system. The results of the research have been incorporated into a report that can easily be translated into a business case for the DTI, which is the first step in evaluating the need for the project and scoping the technical solutions.

The report recommended:

- Creating an authoritative inventory of State land and facilities. The study characterized the current methods as "ad-hoc" and noted considerable variation in methods.
- Establishing institutionalized, cross-agency knowledge of land and facility resources. Currently there is no structured method of sharing this data between and across agencies.
- Developing a centralized system to inventory and manage state lands that will lead to efficiencies in land and facility acquisition, reporting, and disposition.

The OSPC has taken on the task and created an Access Database that contains agency parcels, including school district properties, properties owned by others and managed by state agencies, state authority lands, state authority buildings, DelDOT development rights, lands leased by state agencies, and DNREC conservation easements.

The inventory of the state lands is in its final phase and will be forwarded to each agency for their review, to finalize the inventory. Recently, the lease inventory was updated, incorporated into the database, and the file is now shared with Facilities Management. This allows their file to be updated in the database in real time.

The OSPC is now working on the insured building spreadsheet by matching up building locations with tax parcel numbers so they can be mapped with GIS. The OSPC collaborates with IT to clean the Access Database and normalize column names, so they are the consistent across all tables. There are currently 1,974 agency parcels, 87 parcels managed by the State, 21 parcels where DelDOT purchased the development rights of lands of others, 81 tax parcels owned by authorities and corporations of the State, 58 buildings owned by the authorities and corporations of the State, 139 parcels of land or building leased by the State, and 246 DNREC conservation easements.

While currently upgrading the Access Database we are also working with Esri to assist with the process. OSPC has contracted Esri to facilitate Discovery Workshops with each of the stakeholder agencies to gather the requirements for a centralized system. These workshops will be held in the Fall of 2021. Once the workshops are completed we should have a path forward towards the centralized system for the state.

## *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:

**Development Trends**—IPA continues to assist the OSPC to refine the system for analyzing and tracking 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. In this past year the UD IPA has assisted with:

- Editing, design and production of the 2020 Report on State Planning Issues
- Preparation of municipal comprehensive plan maps for the Towns of Bowers Beach, Ellendale, and Townsend.
- Spatial data analysis and mapping of the Development Trends data
- General support with data, mapping, statistical analysis, editing, and graphic design.

## *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 and information about needed utility and public safety services. The Annexation Plan helps municipalities examine the impact of development in annexation areas. Between July 1, 2020, and June 30, 2021, OSPC received fifteen annexation Plan of Services applications and one request for de-annexation. Of those, eleven have been annexed into municipalities and one parcel has been de-annexed from the City of Milford totaling just over 102 acres. The other applications are still in 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. Between July 1, 2020, and June 30, 2021, the State has reviewed 129 PLUS applications. These applications included comprehensive plan reviews, updates, and amendments, and rezoning requests, site plans, and subdivision plans.

The OSPC is currently working with DTI to greatly enhance the PLUS process for reviewers and applicants. This recently initiated project will integrate GIS and an interactive web portal to improve communication and workflow among agency reviewers and to increase access to information for project applicants and the public. This modernization update is being conducted with the assistance of Esri consultants. This modernization project was initiated after ongoing discussions between the OSPC and our partner agencies to streamline workflow, minimize time requirements, and maximize the specificity agencies could offer to applicants.

# Appendix A: Delaware Development Trends Analysis

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## *Introduction*

The Office of State Planning Coordination (OSPC) began collecting comprehensive development information from across the state in 2008. The data, obtained from 60 local jurisdictions, including all three counties in Delaware, assists in the tracking of development status and trends in the state. They consist of approvals issued at two stages in the development process, both occurring before actual construction begins—development applications 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. The level of activity in the issuing of development applications should correlate roughly to future building permits, with some lag time.

These stages in the development process occur after the initial review of a project (through the Preliminary Land Use Survey, or PLUS), and before the final stage of development in which a Certificate of Occupancy (CO) is issued by the jurisdiction. Not all development activity proposed proceeds to the building permit phase. Similarly, not all permitted building—including residential housing units and non-residential square footage—translates to the actual construction of a building.

Since there is a lag between the development application and building permit stages of development, the two do not always align in a linear fashion. For example, one development application can be approved at the same time as another, but the two approved developments can still take very different tracks. One approved development could be delayed or even cancelled by a variety of circumstances related to the finances of the development, a dip in the economy, or the permitting process, while the other development approved at the same time may go forward with very few issues and start construction much sooner. It is important to understand this context as you read through these trends to understand why applications often do not align perfectly with permits.

None the less, together these two measures can give an overview of development patterns in the state and predict where future development is likely to occur. While not a perfect indicator of activity, they do provide a guide to where development could occur, and where the development community and businesses are focusing their resources.

Data for this analysis have been provided to the Institute for Public Administration (IPA) at the University of Delaware by the OSPC for the most recent 12-year period. Once the OSPC obtains this information from the local jurisdictions, they process it into a GIS-compatible format for analysis. The data elements 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.

The OSPC has, since 1999, been providing the state with a set of state-level policies regarding development priorities, along with a map showing where development should



and should not occur. The latest approved version of this policy is the *2020 Strategies for State Policies and Spending* (the *State Strategies*). This document, which is updated approximately every five years, is used in this analysis to determine the extent to which current development (expressed by development applications and building permits for residential and non-residential projects) is effectively guided by policies at state agencies.

The *State Strategies* defines four “Investment Levels,” or geographic areas, which specify the intensity of development encouraged in each area by the state. Investment Level 1 constitutes areas where growth is most encouraged, Level 2 constitutes areas where growth is acceptable, Level 3 is considered a longer-term growth area where growth is not encouraged, and Level 4 constitutes rural areas where preservation of natural resources and agricultural uses is encouraged and new development is discouraged. By comparing locations where applications for development and building permits have been approved with the *State Strategies* Investment Levels, it is possible to gauge the effectiveness of the state’s growth policies.

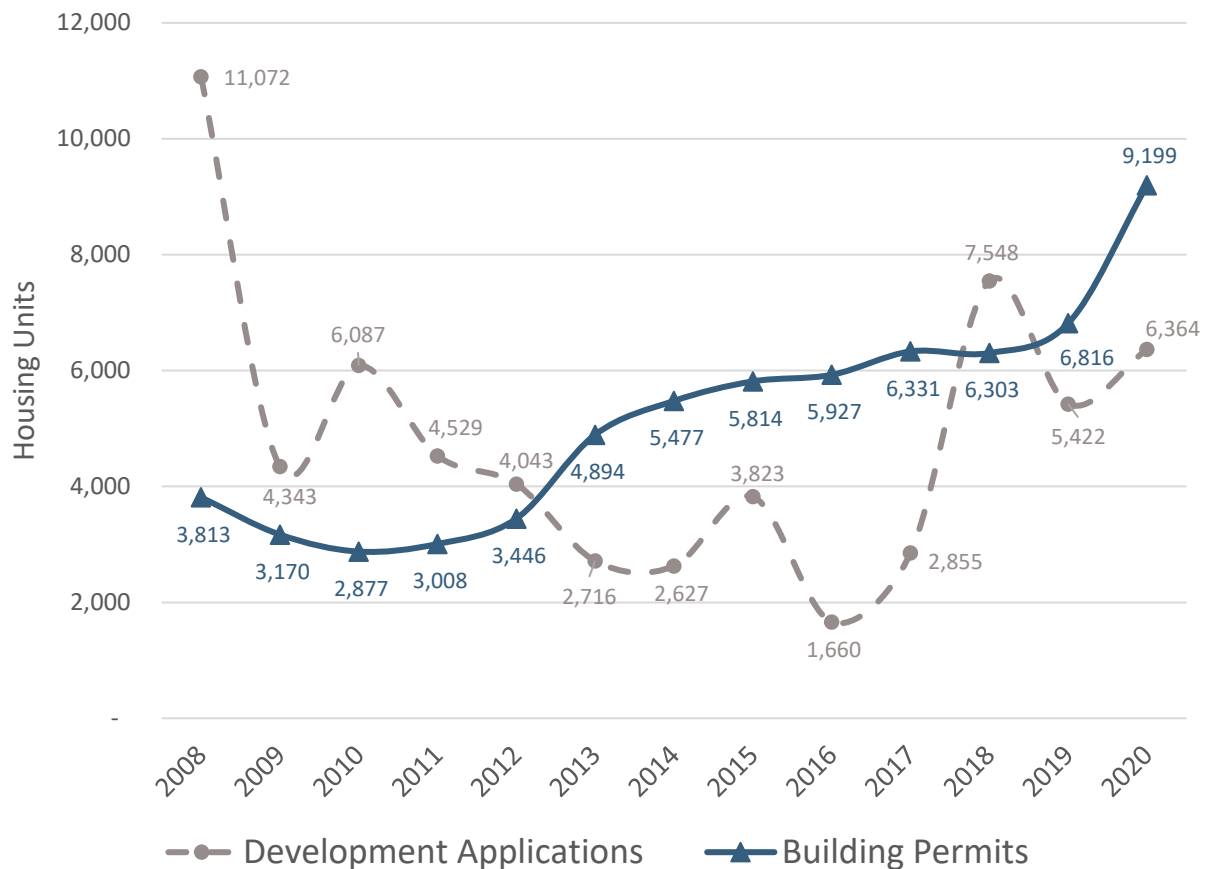
Factors that influence the location of new development are varied, and include, among others, state infrastructure investments, county and municipal land-use plans, local development regulations, real estate market demands, lending practices, individual land developers, and consumer preferences. These factors were used to help develop the overall state policies put forth in the *State Strategies*.

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 degree to which this activity is focused where it is encouraged by state policies provides an indication of the efficacy of the *State Strategies* document in guiding growth.

## *Residential Trends*

Residential development trends in this report are measured based on the number of individual dwelling units in approved development applications and in building permits issued by local governments. The graphs and charts below provide an overview of development and permitting activity throughout the state and within each County over time. On a statewide level, building permits have increased dramatically since the 2008–2011 recession, and development applications declined a great deal increasing again in 2017 and 2018. Most notable is the increase in building permit activity from 2019 to 2020, reflecting close to a 35 percent increase year-over-year in permit activity and the highest number on record by far.

**Figure A.1 Trendlines for number of residential units in development applications (gray line) and building permits (blue line), 2008–2020**



On a county-by-county basis, the trends show some significant variation between the three counties. In terms of applications, Sussex County has led the way over the past six years with over 13,000 applications, followed by New Castle County with about 75 percent of that number, and Kent County with about 34 percent of the total number of applications seen in Sussex. Most of the development activity in both New Castle County and Sussex County has occurred since 2018. In 2020, Kent County had its highest number of applications since 2015, but still lagged far behind New Castle and Sussex County.

**Table A.1 Residential units approved in development applications, by county, 2015–2020**

| County     | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | Total  |
|------------|-------|-------|-------|-------|-------|-------|--------|
| New Castle | 1,000 | 347   | 1,808 | 2,097 | 2,161 | 2,555 | 9,968  |
| Kent       | 1,550 | 445   | 309   | 451   | 728   | 1,016 | 4,499  |
| Sussex     | 1,273 | 868   | 738   | 5,000 | 2,533 | 2,793 | 13,205 |
| Total      | 3,823 | 1,660 | 2,855 | 7,548 | 5,422 | 6,364 | 27,672 |

In terms of permits by county, Sussex County again had by far the most, almost double that of New Castle County over the past six years, and over three times as much as Kent County. Since 2018, Sussex County has had significantly more permit activity than the combined total in both Kent and New Castle County. Permit activity has increased significantly across all three counties from 2019 to 2020, with each increasing between 20 to 40 percent year-over-year. This follows a national trend of increased residential real estate activity nationwide during the COVID-19 pandemic.

**Table A.2 Residential units approved in building permit, by county, 2015–2020**

| County            | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | Total         |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>New Castle</b> | 2,136        | 2,191        | 1,979        | 1,313        | 1,647        | 2,299        | <b>11,565</b> |
| <b>Kent</b>       | 903          | 1,096        | 1,297        | 1,193        | 1,070        | 1,318        | <b>6,877</b>  |
| <b>Sussex</b>     | 2,775        | 2,640        | 3,055        | 3,838        | 4,099        | 5,582        | <b>21,989</b> |
| <b>Total</b>      | <b>5,814</b> | <b>5,927</b> | <b>6,331</b> | <b>6,344</b> | <b>6,816</b> | <b>9,199</b> | <b>40,431</b> |

## *Development Applications*

Development application data represent approved preliminary development plans for residential building (non-residential activity is presented in the following section). These project applications provide an indication of potential future development, indicating the scope and location of likely residential building activity.

Table A.3 presents the number of units for each year by each local jurisdiction.

**Table A.3 Residential units approved in development applications, by local jurisdiction, 2015–2020**

| Jurisdiction             | 2015         | 2016       | 2017         | 2018         | 2019         | 2020         | 2015–2020    |
|--------------------------|--------------|------------|--------------|--------------|--------------|--------------|--------------|
| <b>New Castle County</b> | 820          | 127        | 944          | 1,088        | 1,217        | 2,409        | <b>6,605</b> |
| Delaware City            | -            | -          | -            | -            | -            | 121          | <b>121</b>   |
| Middletown               | -            | 30         | 854          | 948          | 425          | -            | <b>2,257</b> |
| New Castle               | 66           | 27         | -            | -            | -            | -            | <b>93</b>    |
| Newark                   | 89           | 127        | 7            | 23           | 512          | 21           | <b>779</b>   |
| Wilmington               | 25           | 36         | 3            | 38           | 7            | 4            | <b>113</b>   |
| <b>New Castle Total</b>  | <b>1,000</b> | <b>347</b> | <b>1,808</b> | <b>2,097</b> | <b>2,161</b> | <b>2,555</b> | <b>9,968</b> |
| <b>Kent County</b>       | -            | 367        | -            | 394          | 4            | 548          | <b>1,313</b> |
| Cheswold                 | 272          | -          | -            | -            | -            | -            | <b>272</b>   |
| Clayton                  | -            | -          | -            | -            | -            | 54           | <b>54</b>    |

| Jurisdiction         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2015–2020     |
|----------------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Dover</b>         | 986          | 78           | 7            | 4            | 719          | 5            | <b>1,799</b>  |
| <b>Frederica</b>     | -            | -            | 299          | -            | -            | -            | <b>299</b>    |
| <b>Houston</b>       | 4            | -            | -            | -            | -            | -            | <b>4</b>      |
| <b>Milford</b>       | -            | -            | 3            | -            | 2            | 408          | <b>413</b>    |
| <b>Smyrna</b>        | 288          | -            | -            | 53           | 3            | 1            | <b>345</b>    |
| <b>Kent Total</b>    | <b>1,550</b> | <b>445</b>   | <b>309</b>   | <b>451</b>   | <b>728</b>   | <b>1,016</b> | <b>4,499</b>  |
| <b>Sussex County</b> | 48           | 635          | 128          | 3,903        | 1,890        | 837          | <b>7,441</b>  |
| <b>Dewey Beach</b>   | -            | 23           | -            | -            | -            | -            | <b>23</b>     |
| <b>Georgetown</b>    | -            | -            | -            | 138          | -            | -            | <b>138</b>    |
| <b>Greenwood</b>     | -            | -            | -            | 17           | -            | -            | <b>17</b>     |
| <b>Laurel</b>        | -            | -            | -            | -            | -            | 9            | <b>9</b>      |
| <b>Lewes</b>         | -            | -            | 2            | -            | 148          | 2            | <b>152</b>    |
| <b>Milford</b>       | 1,194        | -            | 1            | 37           | 266          | 50           | <b>1,548</b>  |
| <b>Millsboro</b>     | -            | -            | -            | -            | 3            | 163          | <b>166</b>    |
| <b>Millville</b>     | -            | 102          | 551          | 223          | -            | 455          | <b>1,331</b>  |
| <b>Milton</b>        | -            | -            | -            | -            | -            | 84           | <b>84</b>     |
| <b>Ocean View</b>    | 31           | 108          | 56           | 137          | 36           | -            | <b>368</b>    |
| <b>Seaford</b>       | -            | -            | -            | 314          | 8            | 190          | <b>512</b>    |
| <b>Selbyville</b>    | -            | -            | -            | 231          | 182          | 1,003        | <b>1,416</b>  |
| <b>Sussex Total</b>  | <b>1,273</b> | <b>868</b>   | <b>738</b>   | <b>5,000</b> | <b>2,533</b> | <b>2,793</b> | <b>13,205</b> |
| <b>State Total</b>   | <b>3,823</b> | <b>1,660</b> | <b>2,855</b> | <b>7,548</b> | <b>5,422</b> | <b>6,364</b> | <b>27,672</b> |

\*Represents development applications in unincorporated areas of the county

Over the past six years, most approved developments have occurred in unincorporated county areas with about 66 percent of total development applications coming in unincorporated areas of New Castle County, 56 percent in unincorporated areas of Sussex County, and 29 percent in Kent County. In terms of approved applications in municipalities, a few were clear standouts including Middletown, Dover, Milford, Millville, and Selbyville. In 2020, the highest number of development applications were in unincorporated parts of New Castle County with over 2,400, and Selbyville with over 1,000 in 2020 alone. In 2020, nearly 60 percent of all approved applications for residential units in Delaware occurred in unincorporated County areas.

## Building Permits

Building permit data represent development that has been permitted and is closer to entering the construction phase. Since they represent building that is likely to occur soon, building permits present a picture of development activity in the near term.

Table A.4 shows the number of units for each year by local jurisdiction.

**Table A.4 Residential units approved in building permits, by local jurisdiction, 2015–2020**

| Jurisdiction             | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2015–2020     |
|--------------------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>New Castle County</b> | 1,170        | 1,085        | 1,204        | 1,003        | 1,151        | 1,128        | <b>6,741</b>  |
| Bellefonte               | -            | 1            | -            | -            | -            | -            | <b>1</b>      |
| Delaware City            | 1            | 4            | -            | 2            | 17           | 22           | <b>46</b>     |
| Elsmere                  | 2            | -            | -            | 5            | 5            | -            | <b>12</b>     |
| Middletown               | 224          | 247          | 333          | 178          | 321          | 356          | <b>1,659</b>  |
| New Castle               | 5            | 9            | 2            | 3            | 4            | 2            | <b>25</b>     |
| Newark                   | 20           | 259          | 90           | 56           | 78           | 353          | <b>856</b>    |
| Odessa                   | -            | -            | 1            | -            | -            | -            | <b>1</b>      |
| Smyrna                   | 1            | -            | -            | -            | -            | -            | <b>1</b>      |
| Townsend                 | 48           | 45           | 43           | 31           | 31           | 20           | <b>218</b>    |
| Wilmington               | 665          | 541          | 306          | 35           | 40           | 418          | <b>2,005</b>  |
| <b>New Castle Total</b>  | <b>2,136</b> | <b>2,191</b> | <b>1,979</b> | <b>1,313</b> | <b>1,647</b> | <b>2,299</b> | <b>11,565</b> |
| <b>Kent County</b>       | 550          | 618          | 618          | 618          | 652          | 769          | <b>3,825</b>  |
| Bowers Beach             | -            | 1            | -            | 1            | 1            | -            | <b>3</b>      |
| Camden                   | 15           | 17           | 25           | 22           | 68           | 98           | <b>245</b>    |
| Cheswold                 | 13           | 56           | 41           | 46           | 17           | 43           | <b>216</b>    |
| Clayton                  | 19           | 29           | 44           | 58           | 43           | 28           | <b>221</b>    |
| Dover                    | 165          | 225          | 383          | 208          | 49           | 73           | <b>1,103</b>  |
| Farmington               | -            | 1            | -            | 1            | -            | -            | <b>2</b>      |
| Felton                   | 2            | 2            | 2            | 10           | 8            | 8            | <b>32</b>     |
| Frederica                | 17           | 11           | 21           | 21           | 6            | 7            | <b>83</b>     |
| Harrington               | 8            | 4            | 11           | 13           | 17           | 36           | <b>89</b>     |
| Hartly                   | -            | -            | -            | 1            | -            | -            | <b>1</b>      |



| Jurisdiction      | 2015       | 2016         | 2017         | 2018         | 2019         | 2020         | 2015–2020    |
|-------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Houston           | -          | 4            | 1            | -            | -            | -            | 5            |
| Kenton            | -          | -            | 1            | 2            | 8            | 5            | 16           |
| Leipsic           | -          | -            | 1            | -            | 1            | -            | 2            |
| Milford           | 11         | 7            | 6            | 5            | 7            | 20           | 56           |
| Smyrna            | 84         | 104          | 119          | 174          | 162          | 174          | 817          |
| Woodside          | -          | -            | 1            | -            | -            | 1            | 2            |
| Wyoming           | 19         | 17           | 23           | 13           | 31           | 56           | 159          |
| <b>Kent Total</b> | <b>903</b> | <b>1,096</b> | <b>1,297</b> | <b>1,193</b> | <b>1,070</b> | <b>1,318</b> | <b>6,877</b> |
| Sussex County     | 1,945      | 1,845        | 2,219        | 2,889        | 2,946        | 4,319        | 16,163       |
| Bethany Beach     | 22         | 13           | 24           | 14           | 22           | 13           | 108          |
| Bethel            | 4          | 3            | 4            | 4            | 2            | -            | 17           |
| Blades            | 3          | -            | 1            | -            | -            | -            | 4            |
| Bridgeville       | 54         | 19           | 46           | 16           | 31           | 68           | 234          |
| Dagsboro          | 7          | 3            | 10           | 8            | 13           | 15           | 56           |
| Delmar            | 4          | 3            | 8            | 60           | 62           | 9            | 146          |
| Dewey Beach       | 24         | 8            | 7            | 34           | 5            | -            | 78           |
| Ellendale         | 9          | 14           | 9            | 14           | 12           | 9            | 67           |
| Fenwick Island    | 5          | 3            | 10           | 5            | 6            | 5            | 34           |
| Frankford         | 1          | 1            | 2            | 4            | 6            | 8            | 22           |
| Georgetown        | 7          | 32           | 2            | 27           | 153          | 4            | 225          |
| Greenwood         | -          | 6            | 4            | 2            | -            | -            | 12           |
| Henlopen Acres    | -          | 1            | 2            | 1            | 1            | -            | 5            |
| Laurel            | 1          | 1            | 2            | 2            | 5            | 10           | 21           |
| Lewes             | 26         | 39           | 9            | 14           | 26           | 27           | 141          |
| Milford           | 62         | 48           | 98           | 123          | -            | 332          | 663          |
| Millsboro         | 178        | 233          | 171          | 145          | 244          | 266          | 1,237        |
| Millville         | 178        | 141          | 145          | 92           | 167          | 183          | 906          |
| Milton            | 54         | 42           | 32           | 49           | 44           | 48           | 269          |
| Ocean View        | 58         | 67           | 107          | 152          | 158          | 124          | 666          |

| Jurisdiction           | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2015–2020     |
|------------------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Rehoboth Beach</b>  | 37           | -            | 34           | 39           | 36           | 17           | <b>163</b>    |
| <b>Seaford</b>         | 50           | 18           | 14           | 45           | 49           | 69           | <b>245</b>    |
| <b>Selbyville</b>      | 27           | 82           | 81           | 84           | 95           | 40           | <b>409</b>    |
| <b>Slaughter Beach</b> | 4            | 4            | 1            | 3            | 5            | -            | <b>17</b>     |
| <b>South Bethany</b>   | 15           | 14           | 13           | 12           | 11           | 16           | <b>81</b>     |
| <b>Sussex Total</b>    | <b>2,775</b> | <b>2,640</b> | <b>3,055</b> | <b>3,838</b> | <b>4,099</b> | <b>5,582</b> | <b>21,989</b> |
| <b>State Total</b>     | <b>5,814</b> | <b>5,927</b> | <b>6,331</b> | <b>6,344</b> | <b>6,816</b> | <b>9,199</b> | <b>40,431</b> |

\*Represents development applications in unincorporated areas of the county

The big story with residential building permit activity is the tremendous growth in Sussex County. In 2018, Sussex set record highs for number of permits on an annual basis for a county with close to 4,000 permits each year. That number skyrocketed up to over 5,500 in 2020 with the vast majority of this growth happening in unincorporated county areas. Both Kent and New Castle County also saw increased residential building permit activity in 2020, but it was more focused in municipalities rather than unincorporated county areas. Over the past six years municipal permit activity has been focused more broadly than development activity, with Millsboro, Dover, and Middletown having the largest number of new approved units followed by Millville, Smyrna, and Newark. The City of Wilmington saw a significant increase in permit activity in 2020 for the first time in about four years.

## *Relationship to State Strategies*

The OSPC and other state agencies seek to encourage development (both residential and non-residential) in Investment Levels 1 and 2 as defined by the *State Strategies* map, and to steer development away from 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.5 summarizes residential housing units in development applications for the six-year period, 2015 –2020, by county, for the entire state, and by *State Strategies* investment level.

**Table A.5 Residential housing units based on development applications, by county and statewide, by *State Strategies* investment level, 2015–2020**

| County                  | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2015–2020          |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------------|
| <b>New Castle</b>       | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Total Units</b> |
| Level 1 & 2             | 990          | 332          | 1,707        | 1,720        | 1,964        | 2,231        | 8,944              |
| Level 3                 | 3            | 5            | 87           | 238          | 172          | 173          | 678                |
| Level 4                 | 7            | 10           | 14           | 139          | 25           | 151          | 346                |
| <b>New Castle Total</b> | <b>1,000</b> | <b>347</b>   | <b>1,808</b> | <b>2,097</b> | <b>2,161</b> | <b>2,555</b> | <b>9,968</b>       |
| <b>Kent</b>             |              |              |              |              |              |              |                    |
| Level 1 & 2             | 1,546        | 445          | 309          | 451          | 693          | 758          | 4,202              |
| Level 3                 | -            | -            | -            | -            | -            | 258          | 258                |
| Level 4                 | 4            | -            | -            | -            | 35           | -            | 39                 |
| <b>Kent Total</b>       | <b>1,550</b> | <b>445</b>   | <b>309</b>   | <b>451</b>   | <b>728</b>   | <b>1,016</b> | <b>4,499</b>       |
| <b>Sussex</b>           |              |              |              |              |              |              |                    |
| Level 1 & 2             | 1,231        | 284          | 625          | 1,326        | 648          | 1,789        | 5,903              |
| Level 3                 | 41           | 222          | 105          | 2,322        | 519          | 832          | 4,041              |
| Level 4                 | 1            | 362          | 8            | 1,352        | 1,366        | 172          | 3,261              |
| <b>Sussex Total</b>     | <b>1,273</b> | <b>868</b>   | <b>738</b>   | <b>5,000</b> | <b>2,533</b> | <b>2,793</b> | <b>13,205</b>      |
| <b>Delaware</b>         |              |              |              |              |              |              |                    |
| Level 1 & 2             | 3,767        | 1,061        | 2,641        | 3,497        | 3,305        | 4,778        | 19,049             |
| Level 3                 | 44           | 227          | 192          | 2,560        | 691          | 1,263        | 4,977              |
| Level 4                 | 12           | 372          | 22           | 1,491        | 1,426        | 323          | 3,646              |
| <b>State Total</b>      | <b>3,823</b> | <b>1,660</b> | <b>2,855</b> | <b>7,548</b> | <b>5,422</b> | <b>6,364</b> | <b>27,672</b>      |

Table A.6 summarizes residential housing units based on building permits for the six-year period, 2015–2020, by county, for the entire state, and by *State Strategies* investment level. The number of residential units permitted in Level 4 (where growth is not encouraged) dropped significantly in Sussex County in 2020 compared to 2018 and 2019, which is a welcome change. For the first time in three years there was not a very large amount of Level 4 development in Sussex County. Statewide during the past 6 years, approximately 13 percent of all building permits issued were in Level 4 areas (based on

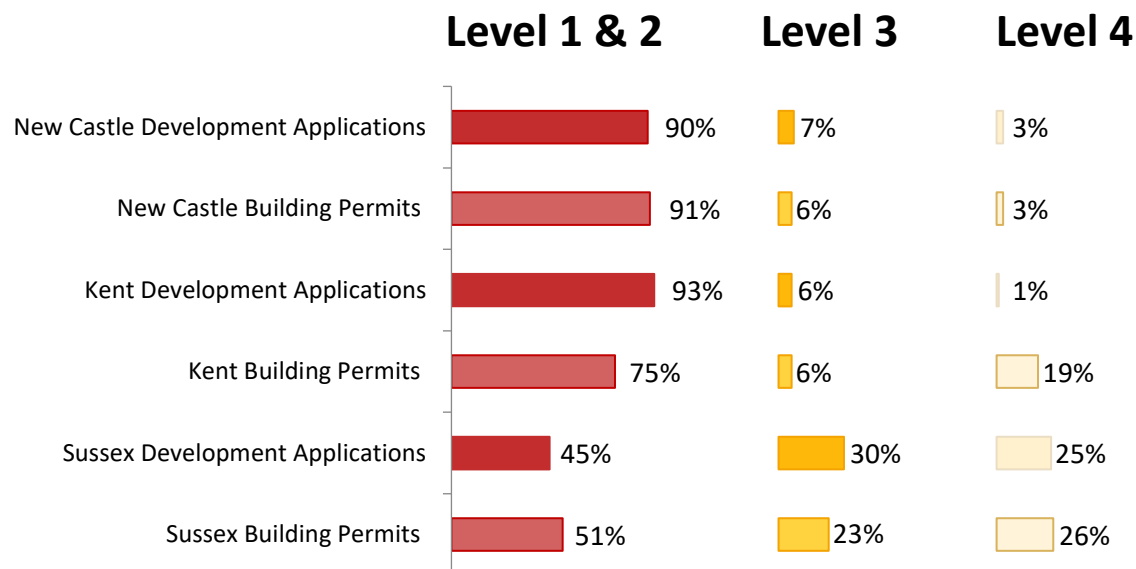
the 2020 *State Strategies*) and about 89 percent of the Level 4 development has occurred in Sussex County during that period of time.

**Table A.6 Residential housing units based on building permits, by county and statewide, by *State Strategies* investment level, 2015–2020.**

| County                  | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2015–2020          |
|-------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------------|
| <b>New Castle</b>       | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Units</b> | <b>Total Units</b> |
| Level 1 & 2             | 1,990        | 2,020        | 1,779        | 1,141        | 1,541        | 2,102        | 10,573             |
| Level 3                 | 109          | 118          | 148          | 126          | 69           | 124          | 694                |
| Level 4                 | 37           | 53           | 52           | 46           | 37           | 73           | 298                |
| <b>New Castle Total</b> | <b>2,136</b> | <b>2,191</b> | <b>1,979</b> | <b>1,313</b> | <b>1,647</b> | <b>2,299</b> | <b>11,565</b>      |
| <b>Kent</b>             |              |              |              |              |              |              |                    |
| Level 1 & 2             | 643          | 803          | 994          | 939          | 809          | 980          | 5,168              |
| Level 3                 | 74           | 72           | 72           | 50           | 58           | 64           | 390                |
| Level 4                 | 186          | 221          | 231          | 204          | 203          | 274          | 1,319              |
| <b>Kent Total</b>       | <b>903</b>   | <b>1,096</b> | <b>1,297</b> | <b>1,193</b> | <b>1,070</b> | <b>1,318</b> | <b>6,877</b>       |
| <b>Sussex</b>           |              |              |              |              |              |              |                    |
| Level 1 & 2             | 1,485        | 1,379        | 1,503        | 2,043        | 2,147        | 2,716        | 11,273             |
| Level 3                 | 533          | 527          | 694          | 737          | 931          | 1,531        | 4,953              |
| Level 4                 | 757          | 734          | 858          | 1,058        | 1,021        | 1,335        | 5,763              |
| <b>Sussex Total</b>     | <b>2,775</b> | <b>2,640</b> | <b>3,055</b> | <b>3,838</b> | <b>4,099</b> | <b>5,582</b> | <b>21,989</b>      |
| <b>Delaware</b>         |              |              |              |              |              |              |                    |
| Level 1 & 2             | 4,118        | 4,202        | 4,276        | 4,123        | 4,497        | 5,798        | 27,014             |
| Level 3                 | 716          | 717          | 914          | 913          | 1,058        | 1,719        | 6,037              |
| Level 4                 | 980          | 1,008        | 1,141        | 1,308        | 1,261        | 1,682        | 7,380              |
| <b>State Total</b>      | <b>5,814</b> | <b>5,927</b> | <b>6,331</b> | <b>6,344</b> | <b>6,816</b> | <b>9,199</b> | <b>40,431</b>      |

The figures in the following pages summarize both the annual trend for the six-year period, 2015–2020, in the number and proportion of residential development units (reflected both in development applications and building permits) by county and by *State Strategies* level (Figure A.3), as well as the total proportion of units in each *State Strategies* level, for the entire six-year period (Figure A.4).

**Figure A.3 Residential development, proportion by *State Strategies* level, by county, 2015–2020**

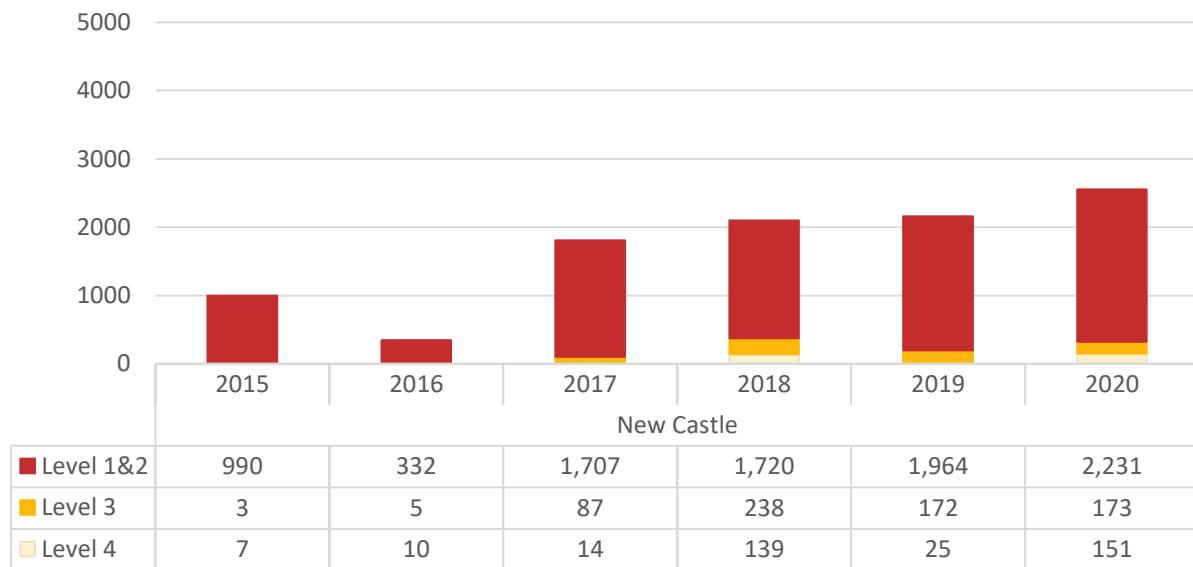


Across the period (2015–2020), the proportion of residential units occurring in areas where growth is most encouraged (Levels 1 and 2) was higher in New Castle and Kent Counties than it was in Sussex County, which saw over a quarter of its approved permits occurring in Level 4 areas. Due to the increase in overall activity in 2020 in Sussex County, more residential building permits were issued in Level 4 areas both in Sussex County and in the state overall in 2020 than any of the previous years. This represents an ongoing problem for the state in terms of directing new development activity away from Level 4 areas of Sussex County, which are intended to be preserved for natural resource and agricultural uses.

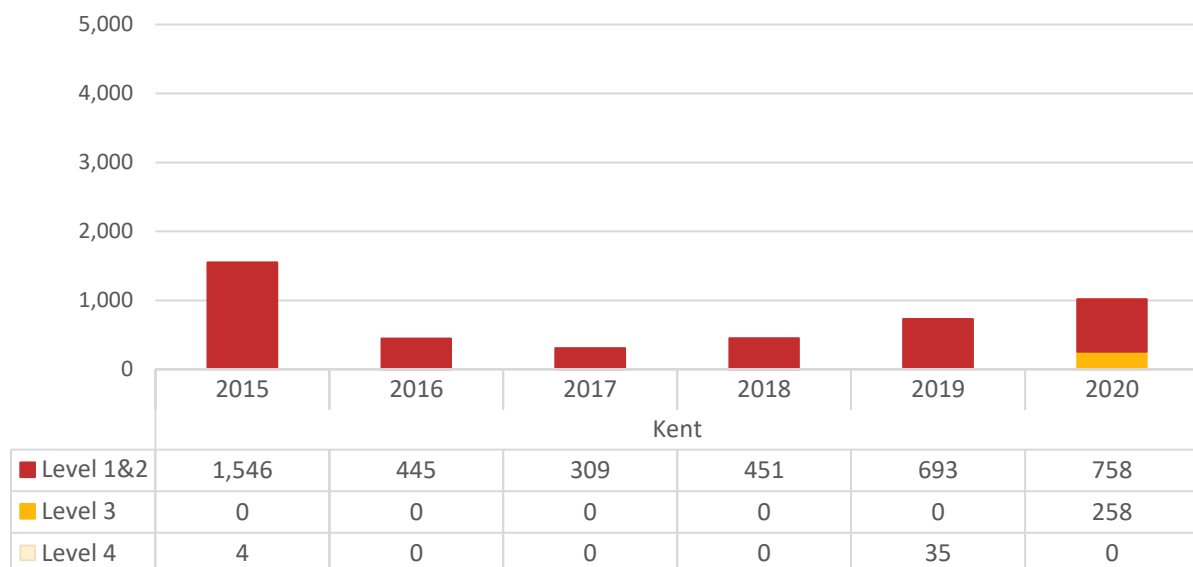


**Figure A.4 Residential units in development applications and building permits, by county and State Strategy level, 2015–2020**

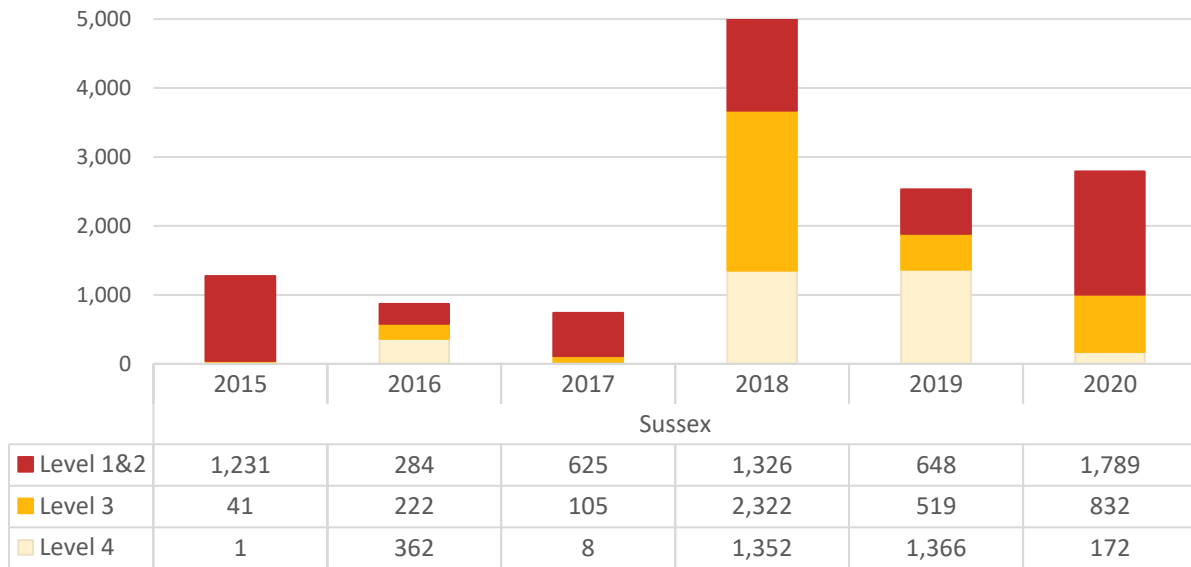
**Residential Development Applications, New Castle County**



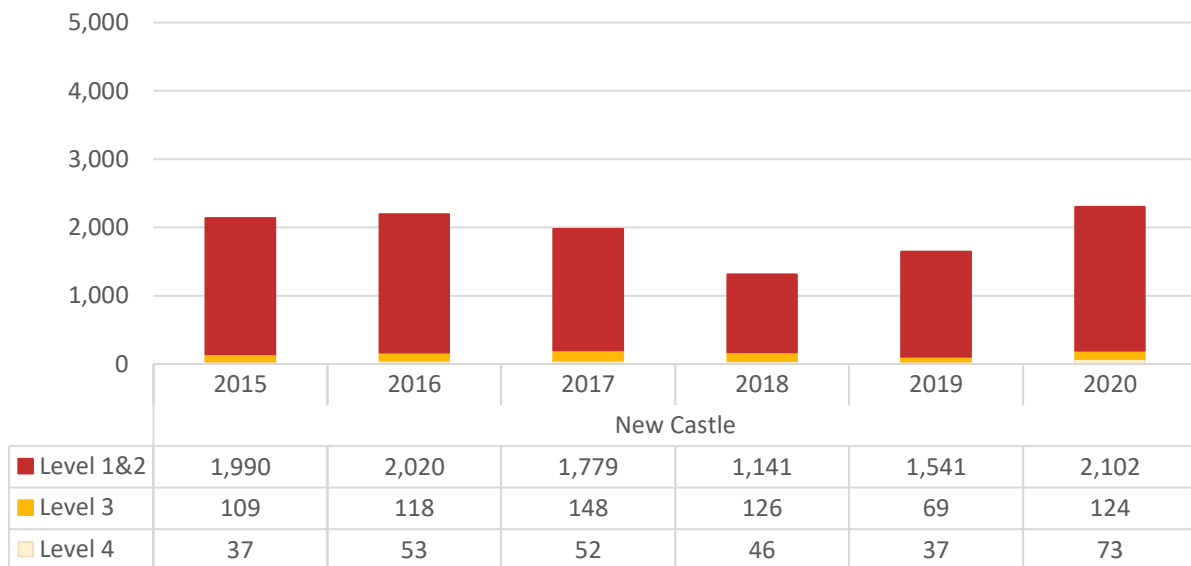
**Residential Development Applications, Kent County**



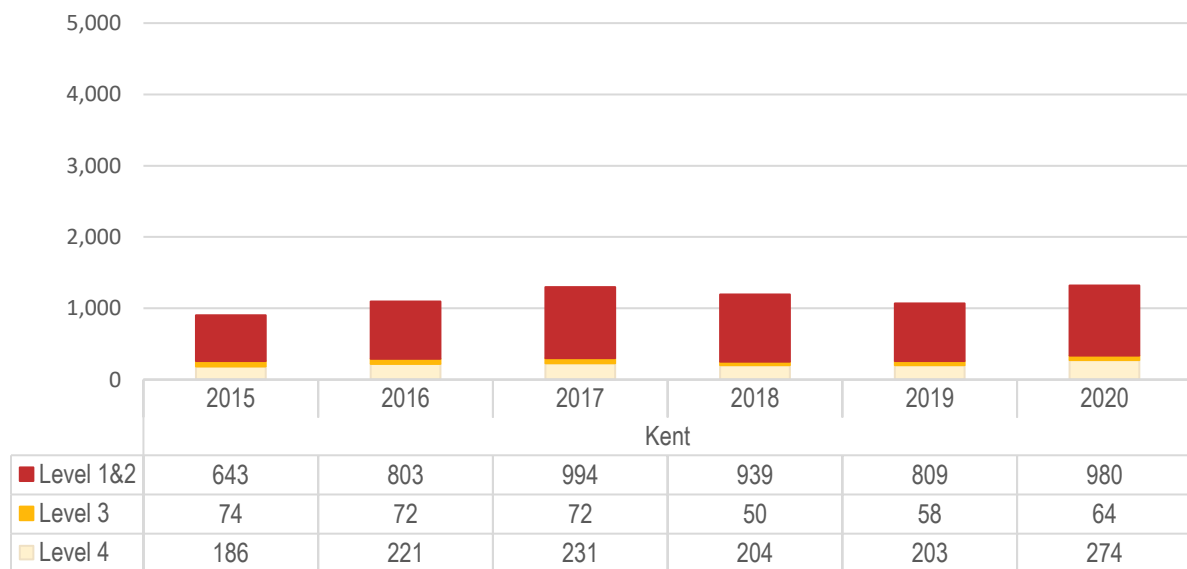
### Residential Development Applications, Sussex County



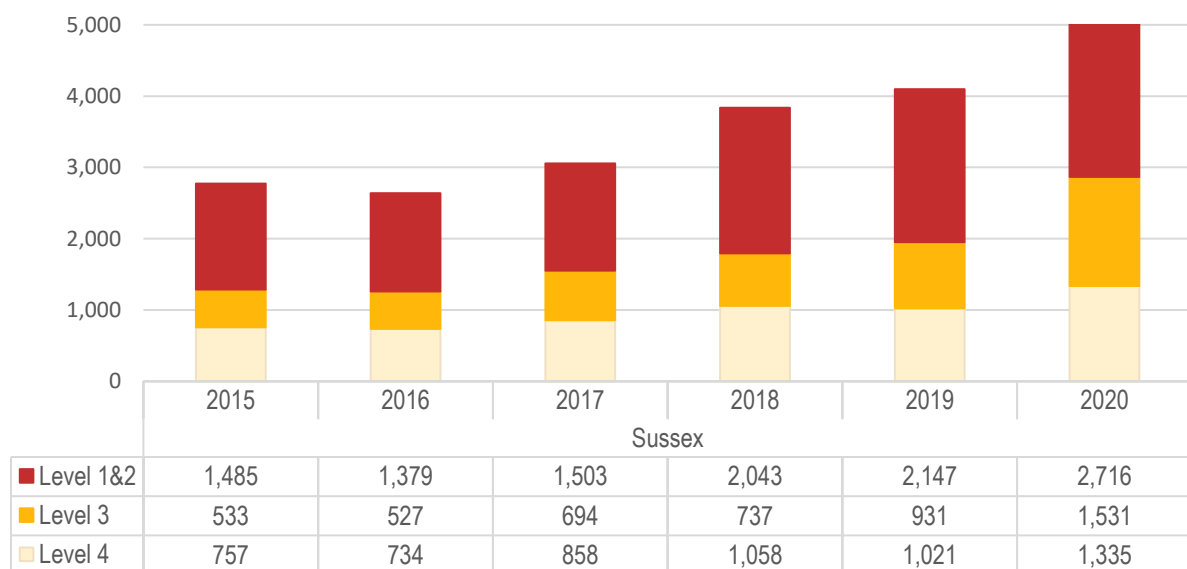
### Residential Building Permits, New Castle County



### Residential Building Permits, Kent County



### Residential Building Permits, Sussex County

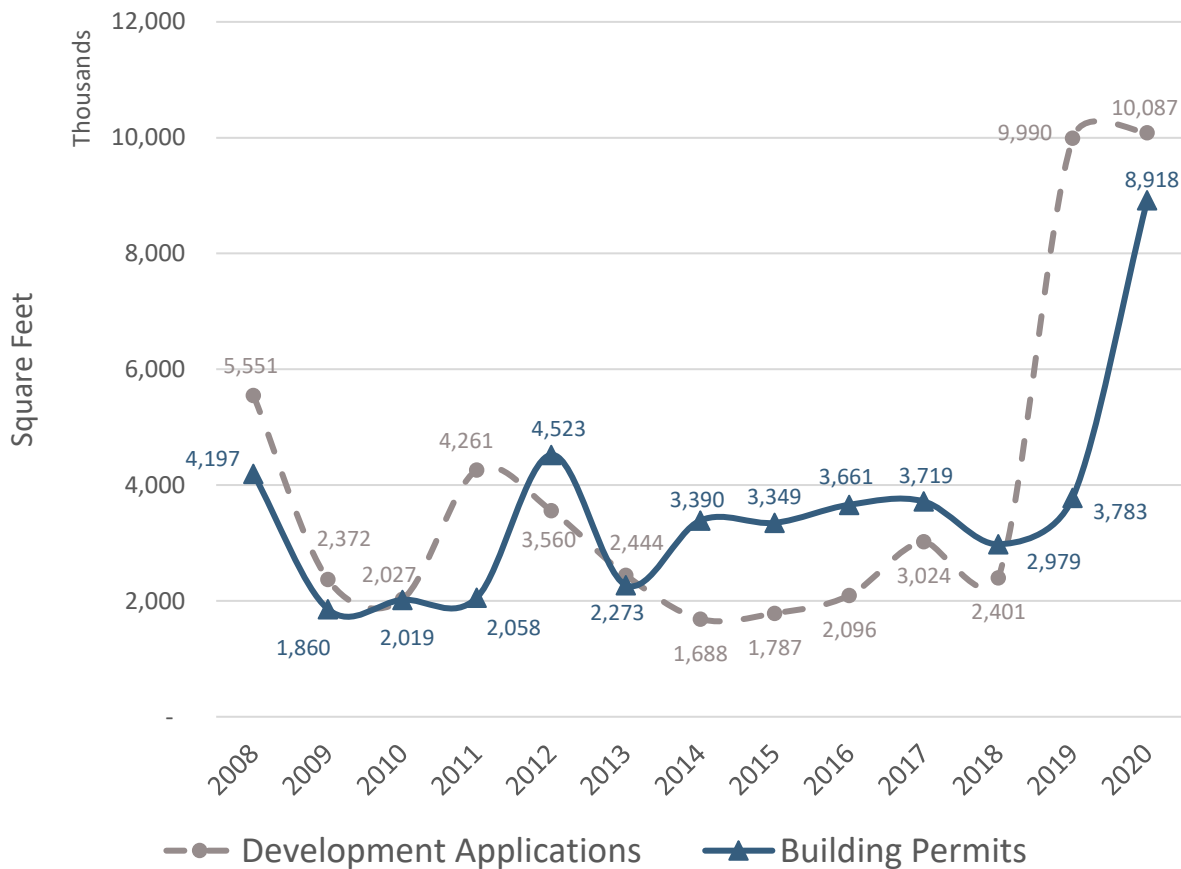


## Non-residential Trends

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. On a statewide level, both development applications and building permits have skyrocketed over the past two years in terms of square footage. This has likely been driven by large warehouse facilities that have been built in recent years, most in New Castle County. Applications jumped up to an

unprecedented level in 2019, and the number of square feet approved through building permits in 2020 corresponds with that number. Prior to the past two years, non-residential activity declined during the 2008–2011 recession before bouncing back in 2011 and 2012, although at a lower level than they had been prior to the recession. From 2012–2019 development activity moved along consistently at a moderate rate until the recent boom.

**Figure A.5 Trendlines for non-residential square footage in development applications (gray line) and building permits (blue line), 2008–2020**



On a county-by-county basis, New Castle County continues to see the majority of non-residential development applications by square footage. While New Castle County historically has much more non-residential development than Kent or Sussex, the amount of square footage has grown tremendously over the past two years. As mentioned previously, this is likely driven by large warehouses such as the Amazon warehouse on Boxwood Road near Wilmington or the DOT Foods warehouse along Route 72 near the Route 1 interchange. Non-residential development increased significantly in both Kent and Sussex as well, with both counties experiencing the largest amount of non-residential square footage proposed in 2020 than any other year during the past six-year period.

**Table A.7 Non-residential square footage approved in development applications, by county, 2015–2020**

| County            | 2015             | 2016             | 2017             | 2018             | 2019             | 2020              | Total             |
|-------------------|------------------|------------------|------------------|------------------|------------------|-------------------|-------------------|
| <b>New Castle</b> | 845,829          | 1,652,375        | 1,942,087        | 1,697,884        | 8,929,158        | 7,451,273         | <b>22,518,606</b> |
| <b>Kent</b>       | 693,592          | 405,361          | 899,432          | 478,635          | 458,508          | 1,193,849         | <b>4,129,377</b>  |
| <b>Sussex</b>     | 247,392          | 37,989           | 182,823          | 224,955          | 602,235          | 1,441,581         | <b>2,736,975</b>  |
| <b>Total</b>      | <b>1,786,813</b> | <b>2,095,725</b> | <b>3,024,342</b> | <b>2,401,474</b> | <b>9,989,901</b> | <b>10,086,703</b> | <b>29,384,958</b> |

In terms of building permits on a square footage approved basis, New Castle County experienced a very large increase in 2020 corresponding to the number of new applications approved in both 2019 and 2020. Kent County continued to lag behind in terms of permits approved, but Sussex County had its highest number of square footage approved since 2016. Given the large number of development applications approved for all three counties in 2020 and the relatively direct correlation between non-residential square footage approved and building permits approved year-over-year, the state can expect a very high amount of approved square footage by building permits in 2021.

**Table A.8 Non-residential square footage approved by building permit, by county, 2015–2020**

| County            | 2015             | 2016             | 2017             | 2018             | 2019             | 2020             | Total             |
|-------------------|------------------|------------------|------------------|------------------|------------------|------------------|-------------------|
| <b>New Castle</b> | 1,877,562        | 2,079,265        | 2,909,565        | 1,693,901        | 2,592,967        | 7,429,329        | <b>18,582,589</b> |
| <b>Kent</b>       | 342,037          | 489,791          | 325,072          | 496,827          | 398,043          | 450,018          | <b>2,501,788</b>  |
| <b>Sussex</b>     | 1,129,779        | 1,091,791        | 484,132          | 788,408          | 792,397          | 1,038,969        | <b>5,325,476</b>  |
| <b>Total</b>      | <b>3,349,378</b> | <b>3,660,847</b> | <b>3,718,769</b> | <b>2,979,136</b> | <b>3,783,407</b> | <b>8,918,316</b> | <b>26,409,853</b> |

## *Development Applications*

Development application data in this section represents approved preliminary development plans for non-residential buildings on a square footage basis. These project applications provide an indication of potential future development, indicating the scope and location of likely residential building activity. It is also important to note that this analysis does not include the number of development approvals, only the square footage, which can vary greatly between a retail use and a warehouse use for instance.

Table A.9 shows the square footage for each year (2015–2020) by local jurisdiction.



**Table A.9 Non-residential square footage approved in development applications, by local jurisdiction, 2015–2020**

| Jurisdiction             | 2015             | 2016             | 2017             | 2018             | 2019             | 2020              | 2015–2020         |
|--------------------------|------------------|------------------|------------------|------------------|------------------|-------------------|-------------------|
| <b>New Castle County</b> | 151,534          | 1,222,574        | 1,206,238        | 1,541,788        | 8,756,643        | 6,992,309         | <b>19,871,086</b> |
| Elsmere                  | -                | 6,500            | -                | -                | 3,130            | -                 | <b>9,630</b>      |
| Middletown               | 676,196          | 249,839          | 648,293          | 67,520           | 86,085           | 458,964           | <b>2,186,897</b>  |
| Newark                   | 8,882            | 173,462          | -                | 8,900            | 83,300           | -                 | <b>274,544</b>    |
| Townsend                 | 9,217            | -                | -                | -                | -                | -                 | <b>9,217</b>      |
| Wilmington               | -                | -                | 87,556           | 79,676           | -                | -                 | <b>167,232</b>    |
| <b>New Castle Total</b>  | <b>845,829</b>   | <b>1,652,375</b> | <b>1,942,087</b> | <b>1,697,884</b> | <b>8,929,158</b> | <b>7,451,273</b>  | <b>22,518,606</b> |
| <b>Kent County</b>       | 176,452          | 27,600           | 269,194          | 271,292          | 95,009           | 302,401           | <b>1,141,948</b>  |
| Cheswold                 | 22,000           | -                | 45,622           | -                | -                | -                 | <b>67,622</b>     |
| Dover                    | 422,603          | 369,441          | 422,078          | 110,344          | 363,499          | 818,912           | <b>2,506,877</b>  |
| Harrington               | -                | -                | 6,777            | 2,753            | -                | -                 | <b>9,530</b>      |
| Hartly                   | -                | 8,320            | -                | -                | -                | -                 | <b>8,320</b>      |
| Milford                  | -                | -                | 57,945           | 82,246           | -                | 42,439            | <b>182,630</b>    |
| Smyrna                   | 72,537           | -                | 97,816           | 12,000           | -                | 30,097            | <b>212,450</b>    |
| <b>Kent Total</b>        | <b>693,592</b>   | <b>405,361</b>   | <b>899,432</b>   | <b>478,635</b>   | <b>458,508</b>   | <b>1,193,849</b>  | <b>4,129,377</b>  |
| <b>Sussex County</b>     | -                | -                | -                | -                | -                | -                 | <b>-</b>          |
| Bridgeville              | 9,100            | -                | -                | -                | -                | -                 | <b>9,100</b>      |
| Delmar                   | -                | -                | -                | 10,000           | -                | -                 | <b>10,000</b>     |
| Georgetown               | 102,635          | 23,989           | 121,685          | 12,085           | 45,106           | 31,143            | <b>336,643</b>    |
| Laurel                   | 119,500          | -                | -                | -                | 3,218            | -                 | <b>122,718</b>    |
| Lewes                    | -                | -                | -                | -                | 313,417          | -                 | <b>313,417</b>    |
| Milford                  | 16,157           | -                | 1,242            | 85,000           | 18,691           | 8,912             | <b>130,002</b>    |
| Millsboro                | -                | -                | 54,294           | -                | -                | 14,270            | <b>68,564</b>     |
| Millville                | -                | -                | -                | 59,524           | 3,700            | 1,243,456         | <b>1,306,680</b>  |
| Ocean View               | -                | 14,000           | -                | 36,000           | 14,000           | 9,982             | <b>73,982</b>     |
| Seaford                  | -                | -                | 5,602            | 16,975           | 198,732          | 124,218           | <b>345,527</b>    |
| <b>Sussex Total</b>      | <b>247,392</b>   | <b>37,989</b>    | <b>182,823</b>   | <b>224,955</b>   | <b>602,235</b>   | <b>1,441,581</b>  | <b>2,736,975</b>  |
| <b>State Total</b>       | <b>1,786,813</b> | <b>2,095,725</b> | <b>3,024,342</b> | <b>2,401,474</b> | <b>9,989,901</b> | <b>10,086,703</b> | <b>29,384,958</b> |

\*Represents development applications in unincorporated areas of the county

The clear take away when reviewing development application data is the large majority of growth that has occurred in unincorporated areas of New Castle County. Over the past two years, about 78 percent of all non-residential development applications approved

statewide have been in unincorporated New Castle County areas based on square footage. This is likely because these parts of New Castle County have been the locations of very large warehouse projects. Over the past six-year period, New Castle County has had three times more non-residential development than Kent and Sussex combined, but the vast majority has come in the past two years. While New Castle County has seen the most non-residential development square footage approved over the past six-years, Kent County has consistently been a strong market for non-residential growth during that time, and both Kent and Sussex County saw a great deal of growth in 2020. Given the amount of residential growth in Sussex County, the non-residential market may begin to grow in future years to service the growing population. At the municipal level, Millville, Dover, and Middletown had the largest number of non-residential developments approved in 2020. Over the past six years, these three municipalities also accounted for the most non-residential development occurring in municipalities. Other municipalities that experienced significant growth over the past six years include Newark, Smyrna, Lewes, and Seaford.

## *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. As stated previously, this analysis does not include the number of development approvals, only the square footage, which can vary greatly depending on the type and size of a building.

Table A.10 shows the square footage approved for each year by local jurisdiction.

**Table A.10 Non-residential square footage approved by building permit, by local jurisdiction, 2015–2020**

| Jurisdiction             | 2015             | 2016             | 2017             | 2018             | 2019             | 2020             | 2015–2020         |
|--------------------------|------------------|------------------|------------------|------------------|------------------|------------------|-------------------|
| <b>New Castle County</b> | 1,177,856        | 1,483,058        | 2,156,092        | 979,812          | 2,333,765        | 6,722,838        | <b>14,853,421</b> |
| Elsmere                  | 745              | -                | -                | 2,050            | -                | -                | <b>2,795</b>      |
| Middletown               | 193,320          | 132,242          | 352,929          | 116,820          | 16,151           | 236,733          | <b>1,048,195</b>  |
| New Castle               | -                | -                | -                | -                | 4,600            | -                | <b>4,600</b>      |
| Newark                   | 97,367           | 130,417          | 269,826          | 338,951          | 167,466          | 291,031          | <b>1,295,058</b>  |
| Smyrna                   | -                | -                | -                | -                | -                | 69,000           | <b>69,000</b>     |
| Townsend                 | -                | 6,000            | -                | -                | -                | -                | <b>6,000</b>      |
| Wilmington               | 408,274          | 327,548          | 130,718          | 256,268          | 70,985           | 109,727          | <b>1,303,520</b>  |
| <b>New Castle Total</b>  | <b>1,877,562</b> | <b>2,079,265</b> | <b>2,909,565</b> | <b>1,693,901</b> | <b>2,592,967</b> | <b>7,429,329</b> | <b>18,582,589</b> |

| Jurisdiction          | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2015–2020        |
|-----------------------|----------------|----------------|----------------|----------------|----------------|----------------|------------------|
| <b>Kent County</b>    | 226,906        | 163,584        | 36,427         | 19,298         | 223,998        | 220,485        | <b>890,698</b>   |
| <b>Bowers Beach</b>   | -              | 1,821          | -              | -              | -              | -              | <b>1,821</b>     |
| <b>Camden</b>         | -              | 21,099         | 20,371         | -              | 17,974         | 18,100         | <b>77,544</b>    |
| <b>Cheswold</b>       | 4,025          | -              | 22,000         | 13,200         | -              | -              | <b>39,225</b>    |
| <b>Clayton</b>        | -              | -              | -              | 6,160          | -              | -              | <b>6,160</b>     |
| <b>Dover</b>          | 101,506        | 260,710        | 152,027        | 386,751        | 48,182         | 99,509         | <b>1,048,685</b> |
| <b>Felton</b>         | -              | -              | 2,400          | 1,800          | -              | 2,400          | <b>6,600</b>     |
| <b>Harrington</b>     | -              | -              | 6,777          | 2,753          | -              | -              | <b>9,530</b>     |
| <b>Hartly</b>         | -              | 8,320          | -              | -              | -              | -              | <b>8,320</b>     |
| <b>Houston</b>        | -              | 2,560          | -              | -              | -              | -              | <b>2,560</b>     |
| <b>Kenton</b>         | -              | -              | -              | -              | 9,113          | -              | <b>9,113</b>     |
| <b>Magnolia</b>       | -              | -              | -              | 3,600          | -              | -              | <b>3,600</b>     |
| <b>Milford</b>        | -              | 12,600         | 36,470         | 8,471          | 41,860         | 72,708         | <b>172,109</b>   |
| <b>Smyrna</b>         | 9,600          | 19,097         | 24,600         | 52,594         | 56,916         | 36,816         | <b>199,623</b>   |
| <b>Woodside</b>       | -              | -              | 24,000         | 2,200          | -              | -              | <b>26,200</b>    |
| <b>Kent Total</b>     | <b>342,037</b> | <b>489,791</b> | <b>325,072</b> | <b>496,827</b> | <b>398,043</b> | <b>450,018</b> | <b>2,501,788</b> |
| <b>Sussex County</b>  | 386,892        | 438,095        | 262,378        | 463,404        | 526,569        | 893,999        | <b>2,971,337</b> |
| <b>Bethany Beach</b>  | -              | -              | 8,800          | -              | -              | -              | <b>8,800</b>     |
| <b>Blades</b>         | 3,700          | -              | -              | -              | -              | -              | <b>3,700</b>     |
| <b>Dagsboro</b>       | -              | -              | -              | -              | 5,376          | 6,000          | <b>11,376</b>    |
| <b>Delmar</b>         | -              | -              | 2,280          | -              | -              | -              | <b>2,280</b>     |
| <b>Dewey Beach</b>    | -              | -              | 2,200          | -              | 8,444          | -              | <b>10,644</b>    |
| <b>Fenwick Island</b> | -              | 3,049          | -              | -              | 45,125         | -              | <b>48,174</b>    |
| <b>Frankford</b>      | -              | 2,130          | 3,226          | 9,840          | -              | 1,272          | <b>16,468</b>    |
| <b>Georgetown</b>     | 120,635        | 22,832         | 108,757        | 79,948         | 30,517         | 36,416         | <b>399,105</b>   |
| <b>Laurel</b>         | 9,180          | 151,885        | -              | -              | 3,218          | -              | <b>164,283</b>   |
| <b>Lewes</b>          | -              | 4,000          | 3,000          | -              | -              | -              | <b>7,000</b>     |
| <b>Milford</b>        | 602,065        | 437,000        | -              | -              | -              | 32,781         | <b>1,071,846</b> |
| <b>Millsboro</b>      | 2,307          | -              | 55,120         | 56,471         | 62,717         | 14,270         | <b>190,885</b>   |

| Jurisdiction          | 2015             | 2016             | 2017             | 2018             | 2019             | 2020             | 2015–2020         |
|-----------------------|------------------|------------------|------------------|------------------|------------------|------------------|-------------------|
| <b>Millville</b>      | -                | 21,000           | 1,692            | 45,684           | 14,879           | -                | <b>83,255</b>     |
| <b>Milton</b>         | -                | 7,000            | -                | -                | -                | -                | <b>7,000</b>      |
| <b>Ocean View</b>     | -                | -                | 13,920           | -                | 14,000           | 24,037           | <b>51,957</b>     |
| <b>Rehoboth Beach</b> | -                | -                | 9,597            | 100,048          | 10,000           | -                | <b>119,645</b>    |
| <b>Seaford</b>        | 5,000            | 4,800            | 8,898            | 16,013           | 49,629           | 30,194           | <b>114,534</b>    |
| <b>Selbyville</b>     | -                | -                | 4,264            | 17,000           | 21,923           | -                | <b>43,187</b>     |
| <b>Sussex Total</b>   | <b>1,129,779</b> | <b>1,091,791</b> | <b>484,132</b>   | <b>788,408</b>   | <b>792,397</b>   | <b>1,038,969</b> | <b>5,325,476</b>  |
| <b>State Total</b>    | <b>3,349,378</b> | <b>3,660,847</b> | <b>3,718,769</b> | <b>2,979,136</b> | <b>3,783,407</b> | <b>8,918,316</b> | <b>26,409,853</b> |

\*Represents development applications in unincorporated areas of the county

Like development applications, the square footage of non-residential buildings measured by permit approvals shows the vast majority of growth happening in New Castle County compared to Kent and Sussex. Also 2020 was a year that saw exponential growth in unincorporated New Castle County areas following the large number of square footage approved by development applications in 2019. Again, this is largely due to large warehouse development construction in these areas near Route 1 and Interstate 95. Interestingly, in Sussex County permit approvals have greatly outpaced development approvals over the past six years in nearly every year. In 2020, Sussex County saw a significant increase in square footage approved while Kent County has had a consistent amount between 300,000 square feet and 500,000 square feet every year for the last six years. It can be expected that all three counties will have a significant amount of square footage approved in 2021 based on development applications increasing. On a municipal level, there was relatively little non-residential development approved by permit in 2020. However, over the past six-year period there has been over 1,000,000 square feet approved in Newark, Middletown, Wilmington, Dover, and Milford combined. These five municipalities have accounted for approximately 75 percent of all the municipal non-residential square footage approved by permit during this time period.

## *Relationship to State Strategies*

In relation to the *State Strategies*, the vast majority of square footage approved by development applications statewide over the six-year period has occurred in Level 1 & 2 areas. About twice as much development has occurred over this time in Level 4 areas than Level 3 areas, primarily in New Castle County. The year 2020 was the first during the reporting period where Sussex County has had any development approved for Level 3 or 4 areas, and as stated previously the amount of development approved in 2019 and 2020 grew a great deal across all three counties but especially in New Castle County.

**Table A.11 Non-residential square footage based on development applications, by county and statewide, by *State Strategies* investment level, 2015–2020**

| County                  | 2015             | 2016             | 2017             | 2018             | 2019             | 2020              | 2015–2020         |
|-------------------------|------------------|------------------|------------------|------------------|------------------|-------------------|-------------------|
| New Castle              | Sq. Ft.          | Sq. Ft.          | Sq. Ft.          | Sq. Ft.          | Sq. Ft.          | Sq. Ft.           | Total Sq. Ft.     |
| Level 1 & 2             | 577,819          | 1,521,908        | 1,796,429        | 1,602,597        | 8,785,656        | 7,357,808         | 21,642,217        |
| Level 3                 | 10,996           | 17,725           | 94,967           | 7,462            | 42,033           | 5,210             | 178,393           |
| Level 4                 | 257,014          | 112,742          | 50,691           | 87,825           | 101,469          | 88,255            | 697,996           |
| <b>New Castle Total</b> | <b>845,829</b>   | <b>1,652,375</b> | <b>1,942,087</b> | <b>1,697,884</b> | <b>8,929,158</b> | <b>7,451,273</b>  | <b>22,518,606</b> |
| <b>Kent</b>             |                  |                  |                  |                  |                  |                   |                   |
| Level 1 & 2             | 649,650          | 389,156          | 823,143          | 434,574          | 422,763          | 1,155,461         | 3,874,747         |
| Level 3                 | 11,760           | 8,320            | -                | -                | 8,460            | -                 | 28,540            |
| Level 4                 | 32,182           | 7,885            | 76,289           | 44,061           | 27,285           | 38,388            | 226,090           |
| <b>Kent Total</b>       | <b>693,592</b>   | <b>405,361</b>   | <b>899,432</b>   | <b>478,635</b>   | <b>458,508</b>   | <b>1,193,849</b>  | <b>4,129,377</b>  |
| <b>Sussex</b>           |                  |                  |                  |                  |                  |                   |                   |
| Level 1 & 2             | 247,392          | 37,989           | 182,823          | 224,955          | 602,235          | 1,108,152         | 2,403,546         |
| Level 3                 | -                | -                | -                | -                | -                | 290,429           | 290,429           |
| Level 4                 | -                | -                | -                | -                | -                | 43,000            | 43,000            |
| <b>Sussex Total</b>     | <b>247,392</b>   | <b>37,989</b>    | <b>182,823</b>   | <b>224,955</b>   | <b>602,235</b>   | <b>1,441,581</b>  | <b>2,736,975</b>  |
| <b>Delaware</b>         |                  |                  |                  |                  |                  |                   |                   |
| Level 1 & 2             | 1,474,861        | 1,949,053        | 2,802,395        | 2,262,126        | 9,810,654        | 9,621,421         | 27,920,510        |
| Level 3                 | 22,756           | 26,045           | 94,967           | 7,462            | 50,493           | 295,639           | 497,362           |
| Level 4                 | 289,196          | 120,627          | 126,980          | 131,886          | 128,754          | 169,643           | 967,086           |
| <b>State Total</b>      | <b>1,786,813</b> | <b>2,095,725</b> | <b>3,024,342</b> | <b>2,401,474</b> | <b>9,989,901</b> | <b>10,086,703</b> | <b>29,384,958</b> |

In terms of non-residential square footage approved by building permit, there has been a larger amount approved in Level 4 areas over the six-year period in Kent and Sussex than New Castle County. Most of this Level 4 activity has occurred in Sussex County despite the lack of development approvals during that time. The year 2020 saw a large increase in square footage approved overall, but especially in Level 1 & 2 areas of New Castle County. There was also a large increase in square footage approved in Level 3 areas in New Castle County in 2020.

**Table A.12 Non-residential square footage based on building permits, by county and statewide, by *State Strategies* investment level, 2015–2020**

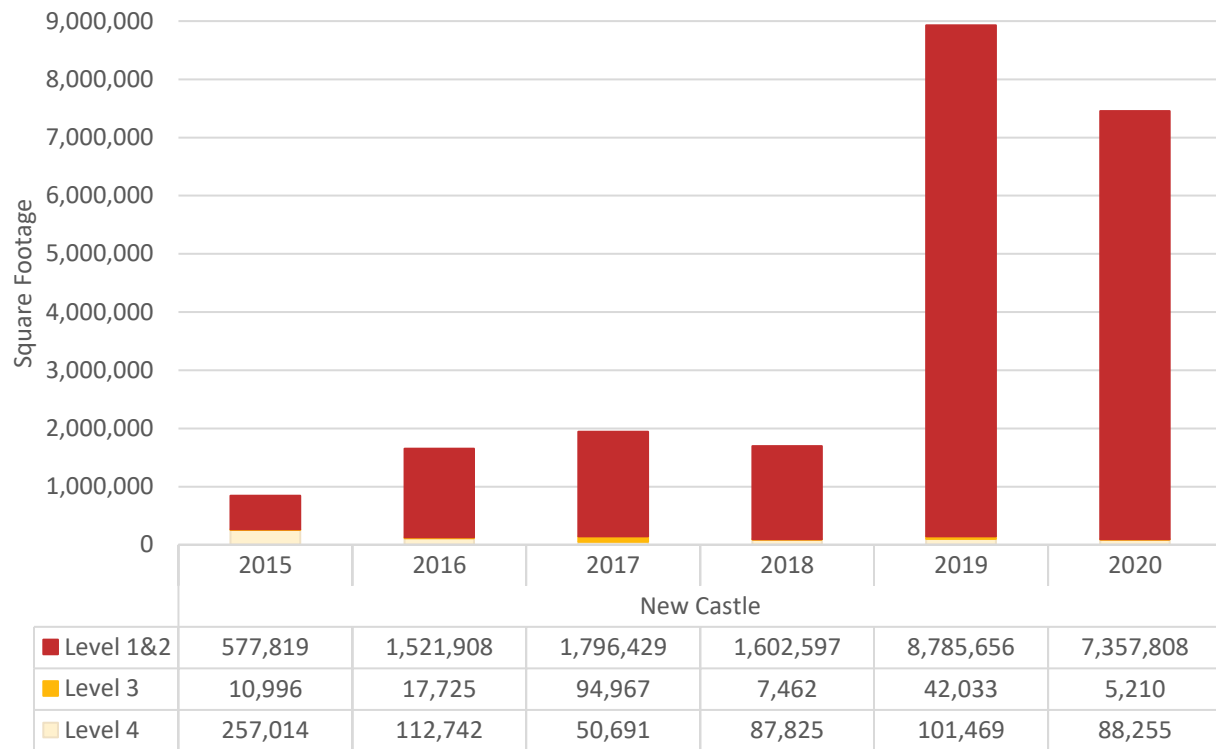
| County                  | 2015             | 2016             | 2017             | 2018             | 2019             | 2020             | 2015–2020            |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------------|----------------------|
| <b>New Castle</b>       | <b>Sq. Ft.</b>   | <b>Sq. Ft.</b>   | <b>Sq. Ft.</b>   | <b>Sq. Ft.</b>   | <b>Sq. Ft.</b>   | <b>Sq. Ft.</b>   | <b>Total Sq. Ft.</b> |
| Level 1 & 2             | 1,767,937        | 2,016,524        | 2,875,289        | 1,496,322        | 2,513,304        | 6,069,001        | 16,738,377           |
| Level 3                 | 94,775           | 8,720            | -                | 115,051          | 33,557           | 1,338,383        | 1,590,486            |
| Level 4                 | 14,850           | 54,021           | 34,276           | 82,528           | 46,106           | 21,945           | 253,726              |
| <b>New Castle Total</b> | <b>1,877,562</b> | <b>2,079,265</b> | <b>2,909,565</b> | <b>1,693,901</b> | <b>2,592,967</b> | <b>7,429,329</b> | <b>18,582,589</b>    |
| <b>Kent</b>             |                  |                  |                  |                  |                  |                  |                      |
| Level 1 & 2             | 171,963          | 455,596          | 292,395          | 481,409          | 295,903          | 414,179          | 2,111,445            |
| Level 3                 | 360              | 28,701           | 7,837            | -                | 8,460            | -                | 45,358               |
| Level 4                 | 169,714          | 5,494            | 24,840           | 15,418           | 93,680           | 35,839           | 344,985              |
| <b>Kent Total</b>       | <b>342,037</b>   | <b>489,791</b>   | <b>325,072</b>   | <b>496,827</b>   | <b>398,043</b>   | <b>450,018</b>   | <b>2,501,788</b>     |
| <b>Sussex</b>           |                  |                  |                  |                  |                  |                  |                      |
| Level 1 & 2             | 910,861          | 934,017          | 301,806          | 556,118          | 635,488          | 568,728          | 3,907,018            |
| Level 3                 | 103,773          | 112,718          | 120,936          | 146,000          | 90,587           | 197,997          | 772,011              |
| Level 4                 | 115,145          | 45,056           | 61,390           | 86,290           | 66,322           | 272,244          | 646,447              |
| <b>Sussex Total</b>     | <b>1,129,779</b> | <b>1,091,791</b> | <b>484,132</b>   | <b>788,408</b>   | <b>792,397</b>   | <b>1,038,969</b> | <b>5,325,476</b>     |
| <b>Delaware</b>         |                  |                  |                  |                  |                  |                  |                      |
| Level 1 & 2             | 2,850,761        | 3,406,137        | 3,469,490        | 2,533,849        | 3,444,695        | 7,051,908        | 22,756,840           |
| Level 3                 | 198,908          | 150,139          | 128,773          | 261,051          | 132,604          | 1,536,380        | 2,407,855            |
| Level 4                 | 299,709          | 104,571          | 120,506          | 184,236          | 206,108          | 330,028          | 1,245,158            |
| <b>State Total</b>      | <b>3,349,378</b> | <b>3,660,847</b> | <b>3,718,769</b> | <b>2,979,136</b> | <b>3,783,407</b> | <b>8,918,316</b> | <b>26,409,853</b>    |

Figure A.5 presents the annual square footage permitted by county and by proportion of *State Strategies* area, across the six-year period (2015–2020).

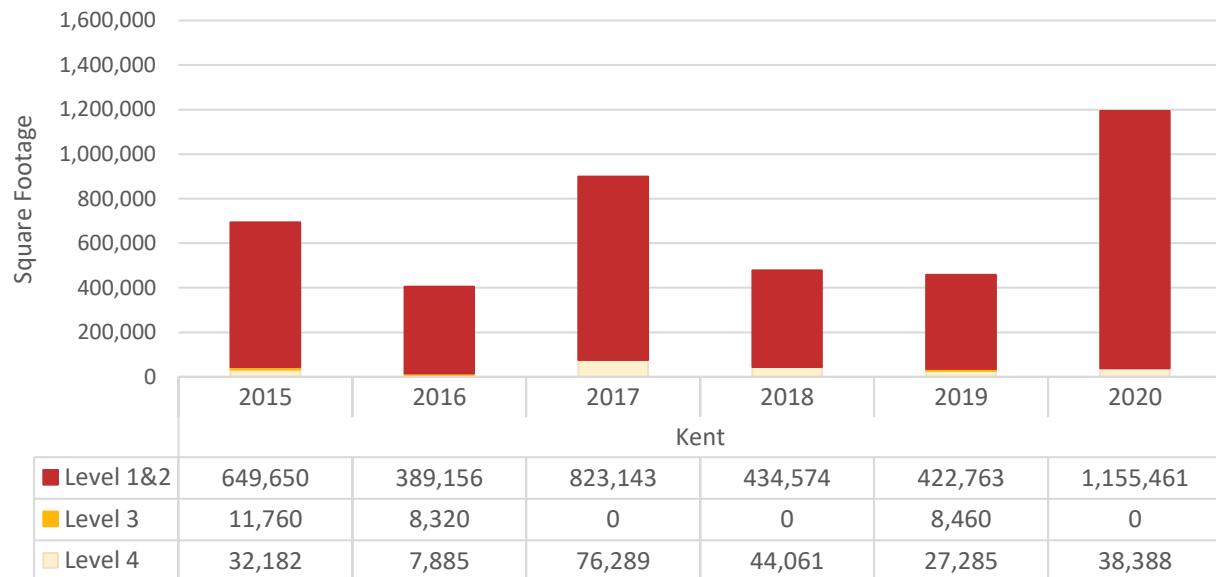
**Figure A.5 Non-residential square footage in development applications and building permits, by county and State Strategy level, 2015–2020**



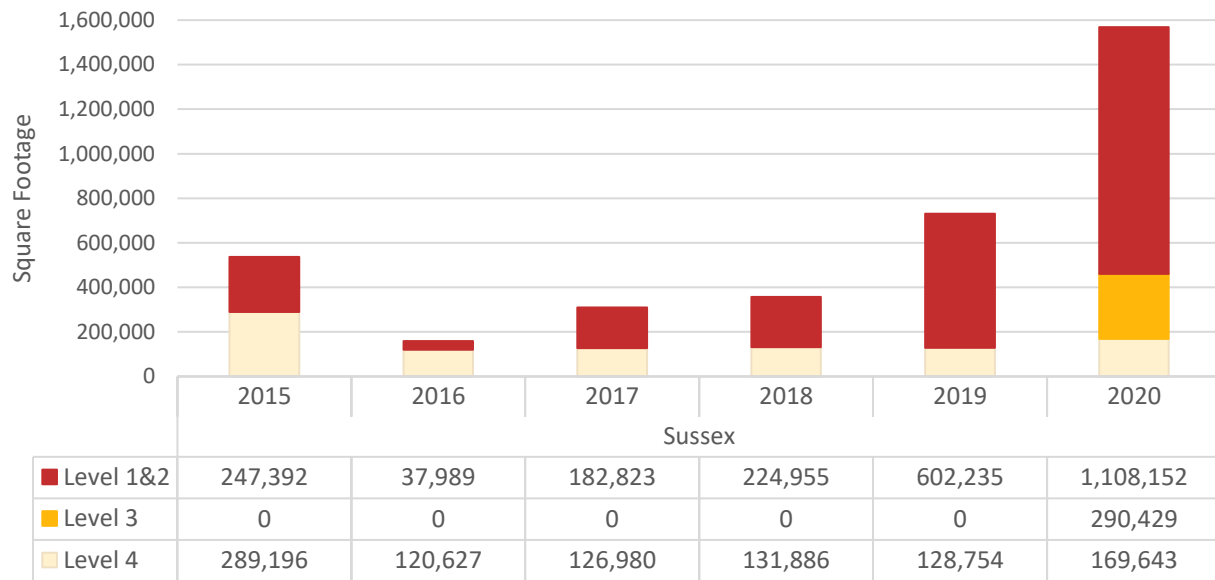
### Non-residential square footage in development applications, New Castle County



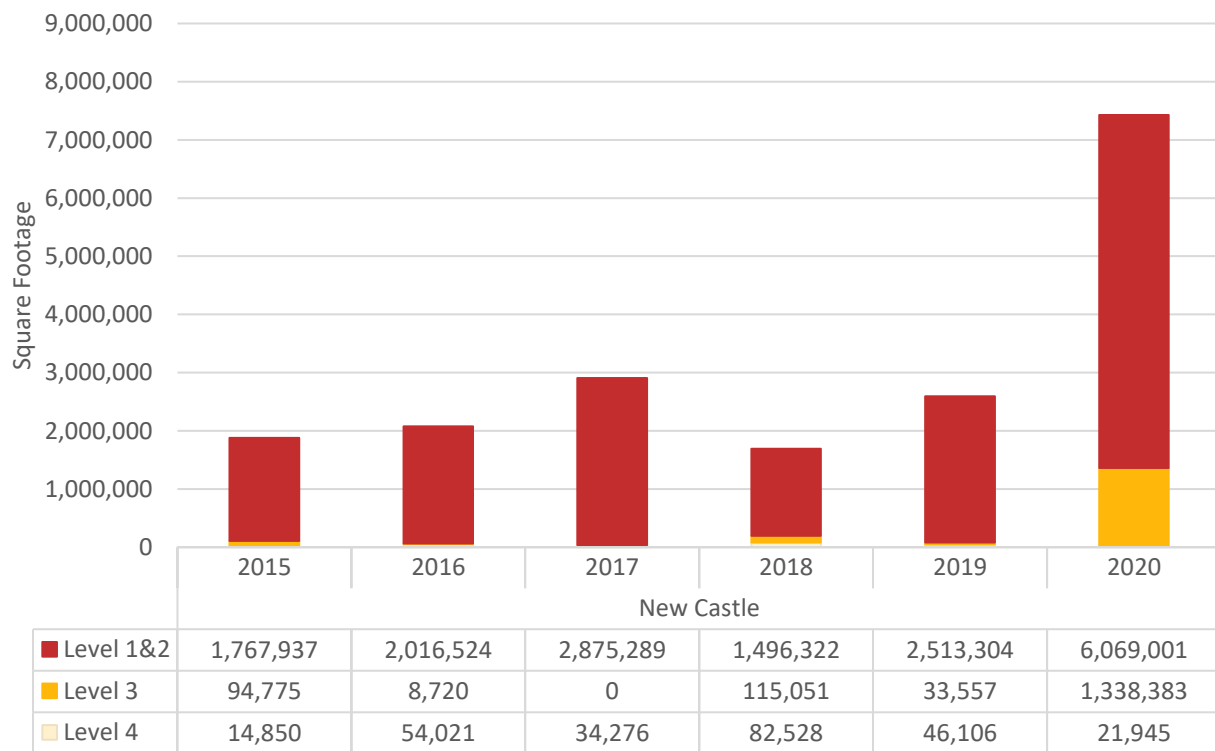
### Non-residential square footage in development applications, Kent County



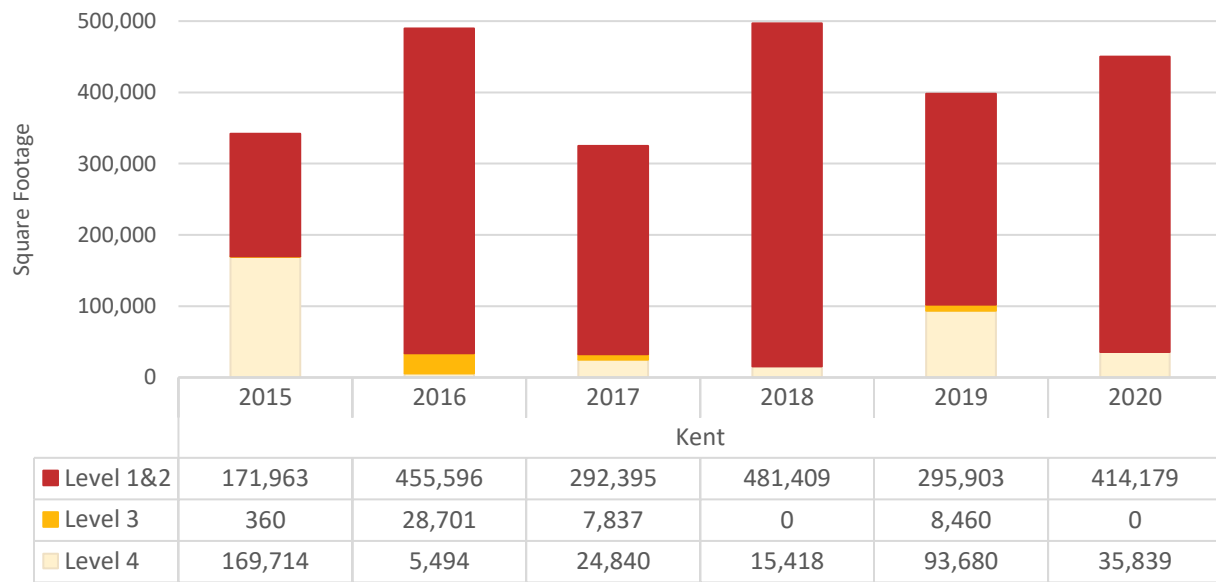
### Non-residential square footage in development applications, Sussex County



### Non-residential square footage in building permits, New Castle County



### Non-residential square footage in building permits, Kent County



### Non-residential square footage in building permits, Sussex County

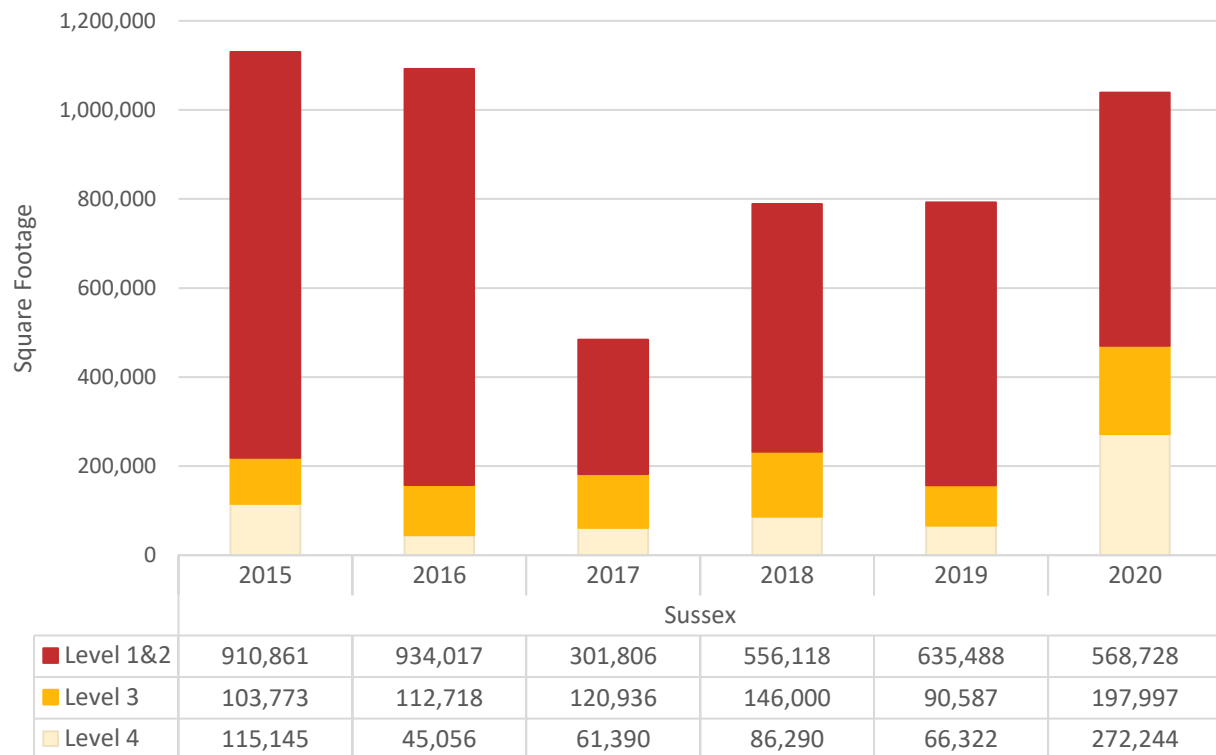
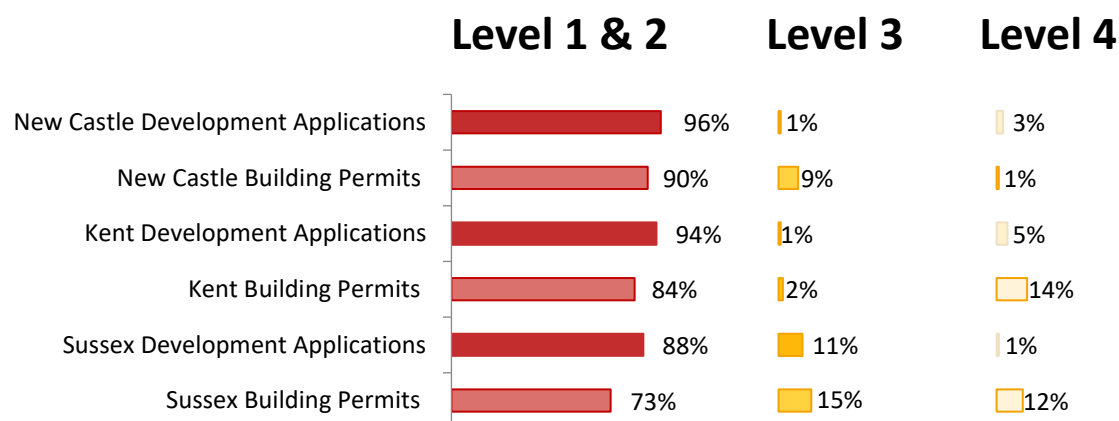


Figure A.6 presents the proportion of non-residential development, based on the square footage in development applications and building permits for the entire six-year period, 2015 to 2020.

**Figure A.6 Non-residential development, proportion by *State Strategies* level, by county, 2015–2020**



## Trends Summary

The following tables (Table A.13 and A.14) summarize the number and percentage of development application and building permits occurring in *State Strategies* Levels 1 & 2, Level 3, and Level 4 areas, for residential and non-residential activity, respectively. The percentage values in the two right-hand columns indicate the degree to which growth is occurring where the state encourages it (i.e., Investment Levels 1–3), versus outside those areas.

**Table A.13 Summary of residential development activity by county and investment level, 2015–2020**

| County  | Levels 1 & 2 | Level 3 | Level 4 | % in Levels 1–3 | % outside Levels 1–3 |
|---|--------------|---------|---------|-----------------|----------------------|
| <b>Residential Units in Development Applications, 2015–2020</b> |              |         |         |                 |                      |
| <b>New Castle County</b>  | 8,944        | 678     | 346     | 97%             | 3%                   |
| <b>Kent County</b>  | 4,202        | 258     | 39      | 99%             | 1%                   |
| <b>Sussex County</b>  | 5,903        | 4,041   | 3,261   | 75%             | 25%                  |
| <b>Residential Units in Building Permits, 2015–2020</b>         |              |         |         |                 |                      |
| <b>New Castle County</b>  | 10,573       | 694     | 298     | 97%             | 3%                   |
| <b>Kent County</b>  | 5,168        | 390     | 1,319   | 81%             | 19%                  |
| <b>Sussex County</b>  | 11,273       | 4,953   | 5,763   | 74%             | 26%                  |

Residential growth in New Castle County was focused largely in areas where it is encouraged, with 9 percent of development applications and 97 percent of building permits being in those areas over the past five years. Kent County saw the next highest percentage of residential activity there (99% of development applications and 81% of building permits), while also showing the largest difference between percentage of applications and percentage of building permits located in areas where the state encourages growth. Sussex County had the lowest rate of approved development applications (75%) and building permits (74%) in areas encouraged for growth. Overall, the vast majority of growth in New Castle County has occurred in areas where the state prefers growth, while a significant amount of growth occurred in Level 4 areas in both Kent and Sussex County. Sussex County continued to approve a far greater amount of Level 4 residential development than other parts of Delaware, leading to a rapid expansion of new homes, roads, and infrastructure in previously undeveloped portions of the county.

**Table A.14 Summary of non-residential development activity by county and investment level, 2015–2020**

| County   | Levels 1 & 2 | Level 3   | Level 4 | % in Levels 1–3 | % outside Levels 1–3 |
|--|--------------|-----------|---------|-----------------|----------------------|
| <b>Non-Residential Square Footage in Development Applications, 2015–2020</b> |              |           |         |                 |                      |
| <b>New Castle County</b>   | 21,642,217   | 178,393   | 697,996 | 97%             | 3%                   |
| <b>Kent County</b>   | 3,874,747    | 28,540    | 226,090 | 95%             | 5%                   |
| <b>Sussex County</b>   | 2,403,546    | 290,429   | 43,000  | 98%             | 2%                   |
| <b>Non-Residential Square Footage in Building Permits, 2015–2020</b>         |              |           |         |                 |                      |
| <b>New Castle County</b>   | 16,738,377   | 1,590,486 | 253,726 | 99%             | 1.4%                 |
| <b>Kent County</b>   | 2,111,445    | 45,358    | 344,985 | 86%             | 14%                  |
| <b>Sussex County</b>   | 3,907,018    | 772,011   | 646,447 | 88%             | 12%                  |

Non-residential development applications across all three counties are highly focused in the areas where growth is encouraged. New Castle County saw 97 percent of its approved non-residential square footage in development applications and 99 percent of its building permits in Investment Level 1–3 areas. Kent County had 95 percent of its square footage in development applications and 86 percent in building permits occurring in Investment Levels 1–3. Sussex County had 98 percent of its square footage in development applications and 88 percent in building permits occurring in Investment Levels 1–3. Overall, the vast majority of non-residential development and permit approvals occurred in areas where the state prefers growth, but the growth that did occur in Level 4 areas were almost entirely in Kent and Sussex Counties.

## *Overview of Methodology*

The OSPC and IPA conducted a spatial analysis 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 to perform the analysis and compare development activity relative to the 2020 *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, crossroads, etc.) pertaining to the permit or application were included. All development data were structured and compiled into a single, consistent dataset in Esri Geodatabase format.

The results of this analysis should be used to determine 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

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) 2021, the Delaware Department of Education's capital expenditures for public education equaled \$168.2 million, which included \$95 million for new construction and land acquisition. The remaining funds were used for maintenance and upgrades to existing school facilities. The operating budget for public education was \$1.643 billion in FY 2021, which represented approximately one third of Delaware's General Fund budget.

**Table B.1 Public education trends and indicators, fiscal years 2017–2021**

|  | FY 2017       | FY 2018       | FY 2019       | FY 2020       | FY 2021       |
|--|---------------|---------------|---------------|---------------|---------------|
| <b>Total Enrollment*</b>   | 136,706       | 137,873       | 138,666       | 140,363       | 137,956       |
| <b>Charter School Enrollment</b>                                       | 15,030        | 15,882        | 16,088        | 16,366        | 16,910        |
| <b>State Portion, Public Education Operating Budget (in thousands)</b> | \$1,379,643.5 | \$1,418,473.8 | \$1,481,992.2 | \$1,571,366.6 | \$1,643,857.3 |
| <b>State Portion, Education Bond Bill</b>                              | \$76,424,600  | \$132,542,464 | \$148,109,697 | \$154,117,588 | \$168,223,015 |
| <b>State Portion, New Construction and Land Acquisition**</b>          | \$8,028,200   | \$57,261,863  | \$96,832,561  | \$101,710,037 | \$95,032,915  |
| <b>New Schools Opened&lt;&lt;</b>                                      | 0             | 1             | 1             | 1             | 3             |

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.

## 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. These benefits show how this infrastructure investment improves the quality of life for Delaware’s citizens. The following table lists the funding for trails and pathways from the Delaware Department of Transportation (DelDOT) and the Delaware Department of Natural Resources and Environmental Control (DNREC) since FY 2017.

**Table B.2 Trails and pathways funding, fiscal years 2017–2021, in millions**

| Agency | FY 2017 | FY 2018 | FY 2019 | FY 2020 | FY 2021 | Total  |
|--------|---------|---------|---------|---------|---------|--------|
| DNREC  | \$2.5   | \$0     | \$ .2   | \$0     | \$0     | \$2.7  |
| DelDOT | \$5.4   | \$ .8   | \$7.7   | \$1.0   | \$1.6   | \$16.5 |
| Total  | \$7.9   | \$ .8   | \$7.9   | \$1.0   | \$1.6   | \$19.2 |

**Table B.3 Trail project summary and status**

| Name                             | Summary and Status  |
|----------------------------------|---|
| <b>New Castle County</b>         |   |
| Tri Valley Phase II              | 1.12 miles long, 8-foot-wide asphalt multi-use trail and a 200-foot pedestrian bridge. The trail starts at the intersection of Smith Mill Road and continues in a northerly direction toward Corner Ketch Road. The work included the construction of a new paved trail and pedestrian bridge and boardwalks. <b>COMPLETE</b> |
| Lums Pond Trail Connector        | 10,000± linear foot pedestrian trail with associated site and drainage improvements located at Lums Pond State Park. <b>DESIGN</b>  |
| Northern Delaware Greenway Trail | Project involves stairs for a steep slope that allow for a shorter safer access route between the swinging bridge across the Brandywine River and the Northern Delaware Greenway Trail. <b>DESIGN</b>   |

|                             |  |
|-----------------------------|--|
| Wendel Cassel Trail         | Repaving of 1,000± linear feet of trail that had fallen into disrepair. Project is under construction and is slated to be complete in the fall 2021.   |
| Pomeroy Trail               | Adding lighting to 1,300± linear feet of the Pomeroy Trail near the University of Delaware to increase the safety of trail users. The construction is slated to begin in August 2021.  |
| <b>Kent County</b>          |  |
| Killens Pond Elevated Trail | Erection of a pre-manufactured aluminum walkway over Killens Pond. The work included installing steel pipe piles and steel cross beams to support the walkway. Additional work included the construction of a stone trail, repaving the boat ramp area, and educational waysides on the walkway.<br><b>COMPLETE</b>                                      |
| <b>Sussex County</b>        |  |
| Wolfe Neck Trail            | Project involves the construction of a six-mile loop bike trail. The trail when complete will be 3-feet-wide with a stone surface. The loop trail will connect to the Junction & Breakwater Trail near the Wolfe Neck Trailhead. Currently the project is in the <b>DESIGN</b> phase and going through the National Environmental Protection Act (NEPA). |
| Assawoman Canal Trail       | Project involves the construction of a kayak basin with accessible kayak launch. <b>COMPLETE</b>   |

## *Roads and Bridges*

DelDOT is responsible for maintaining approximately 85 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 considering recent growth and development trends. In FY 2021, DelDOT made capital expenditures of over \$370 million in state funds to address Delaware's transportation needs. Total capital spending in FY 2021 was more than \$663 million, including federal funds.

Table B.4 demonstrates trends that are relevant to transportation planning. The number of licensed drivers has increased substantially. The number of vehicle miles traveled (VMT) and DART and Paratransit ridership saw a sharp decline in FY 2021. Those figures are consistent with decreased travel due to the COVID-19 pandemic.

**Table B.4 Transportation trends and indicators, fiscal years 2017–2021**

|                                   | <b>FY 2017</b> | <b>FY 2018</b> | <b>FY 2019</b> | <b>FY 2020</b> | <b>FY 2021</b> |
|-----------------------------------|----------------|----------------|----------------|----------------|----------------|
| <b>Licensed Drivers</b>           | 721,561        | 786,504        | 801,086        | 807,626        | 824,123        |
| <b>Registered Motor Vehicles*</b> | 921,850        | 928,927        | 934,615        | 919,414        | 961,501        |

|   | FY 2017    | FY 2018    | FY 2019    | FY 2020   | FY 2021   |
|---|------------|------------|------------|-----------|-----------|
| <b>Vehicle Miles Traveled* (billions)</b>             | 10.4       | 10.7       | 10.4       | 10.5      | 8.3       |
| <b>DART R2 Rail Ridership</b>                         | 1,128,094  | 1,160,079  | 1,196,630  | 840,692   | 211,975   |
| <b>DART Fixed Route Ridership (millions)</b>          | 7.5        | 7.2        | 7.2        | 6.0       | 4.1       |
| <b>Paratransit Ridership</b>                          | 953,234    | 926,884    | 945,628    | 758,064   | 455,279   |
| <b>Transportation Trust Fund Revenues (thousands)</b> | \$554,600  | \$565,500  | \$588,200  | \$551,100 | \$468,393 |
| <b>State Capital Expenditures (thousands)</b>         | \$217,435* | \$233,936* | \$312,206* | 374,784*  | \$370,223 |
| <b>Federal Capital Expenditures (thousands)</b>       | \$215,920  | \$233,904  | \$215,668  | \$278,499 | \$293,501 |
| <b>Total Capital Expenditures (thousands)</b>         | \$433,355  | \$467,840  | \$527,874  | \$653,283 | \$663,724 |

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

\*Without US 301 (State Capital Expenditures with US 301 equal \$400,380 for a total of \$616,048)

## Water and Wastewater

While the operation of drinking water and wastewater systems has traditionally been the domain of Delaware's local governments, the Delaware 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 wastewater projects through the Water Pollution Control Revolving Funds, which is a program that is administered by DNREC to provide support for community wastewater service projects. In FY 2021, a total of \$12.2 million of state and federal funds were expended. The State has also provided assistance for wastewater projects through a 21st Century Fund Wastewater Management Account.

**Table B.5 Wastewater funding to local governments, fiscal years 2017–2021**

|  | FY 2017     | FY 2018           | FY 2019            | FY 2020     | FY 2021           |
|--|-------------|-------------------|--------------------|-------------|-------------------|
| <b>Projects Funded</b>                               | 9           | 4, +1<br>increase | 12 + 3<br>increase | 5           | 5 + 1<br>increase |
| <b>Water Pollution Control Funds (State Match)*</b>  | \$1,305,000 | \$1,294,800       | \$1,571,800        | \$1,556,000 | \$1,556,000       |
| <b>Water Pollution Control Funds (Federal Grant)</b> | \$6,525,000 | \$6,474,000       | \$7,859,000        | \$7,779,000 | \$7,780,000       |

|   | FY 2017      | FY 2018      | FY 2019      | FY 2020      | FY 2021      |
|---|--------------|--------------|--------------|--------------|--------------|
| <b>Water Pollution Control<br/>Revolving Funds (Principal<br/>and Interest Repayments)*</b> | \$8,070,020  | \$58,203,048 | \$58,632,188 | \$4,414,960  | \$2,874,309  |
| <b>Water Pollution Control Funds<br/>(Total)</b>  | \$15,900,020 | \$65,971,848 | \$68,062,988 | \$13,749,760 | \$12,210,309 |
| <b>21st Century Wastewater Fund<sup>1</sup></b>   | \$621,650    | \$235,063    | \$0          | \$0          | \$0          |

Source: DNREC Environmental Finance

\* State Funds

## Public Safety

### Paramedic Program

The State currently provides 30 percent of the funding that the counties use to provide their jurisdictions with paramedic service. This percentage remained consistent with the 30 percent in the most recent budget process. In FY 2021, the State (at 30 percent) funded county paramedic operations with \$13.9 million of state funding.

**Table B.6 State paramedic program funding, fiscal years 2017–2021**

|                      | FY 2017      | FY 2018     | FY 2019      | FY 2020      | FY 2021      |
|----------------------|--------------|-------------|--------------|--------------|--------------|
| <b>State Portion</b> | 30%          | 24%         | 30%          | 30%          | 30%          |
| <b>New Castle</b>    | \$5,211,418  | \$4,153,270 | \$5,211,419  | \$6,063,137  | \$6,433,159  |
| <b>Kent</b>          | \$1,425,949  | \$1,212,635 | \$1,703,902  | \$2,102,310  | \$2,394,294  |
| <b>Sussex</b>        | \$4,172,763  | \$3,241,214 | \$4,351,845  | \$5,099,873  | \$5,086,141  |
| <b>Total</b>         | \$10,810,131 | \$8,607,119 | \$11,267,166 | \$13,265,320 | \$13,913,594 |

Source: Delaware Office of Management and Budget

### State Police

The Delaware State Police (DSP) 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 DSP 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.

From FY 2017 through FY 2021, the funding necessary to support the DSP has steadily increased from \$114.7 million in FY 2017 to \$151.8 million in FY 2021.

**Table B.7 State police personnel and budget, fiscal years 2017–2021**

|                                    | FY 2017     | FY 2018     | FY 2019     | FY 2020     | FY 2021     |
|------------------------------------|-------------|-------------|-------------|-------------|-------------|
| <b>Total Employees*</b>            | 965         | 963         | 975         | 985         | 986         |
| <b>GF Budget**<br/>(thousands)</b> | \$114,757.6 | \$115,662.3 | \$118,076.8 | \$123,391.9 | \$151,583.4 |

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

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 285 farms, totaling over 24,000 acres. This has been accomplished using a combination of federal, state, and local funds.

The Agriculture Lands (Aglands) Preservation Program 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.

**Table B.8 Farmland preservation by easement, fiscal years 2017–2021**

|                           | FY 2017     | FY 2018†    | FY 2019‡     | FY 2020^     | FY 2021     |
|---------------------------|-------------|-------------|--------------|--------------|-------------|
| <b>Farms Preserved</b>    | 32          | 36          | 109          | 63           | 45          |
| <b>Acres Preserved</b>    | 2,980       | 3,420       | 9,275        | 5,300        | 3,263       |
| <b>State Funds</b>        | \$2,252,048 | \$2,508,253 | \$8,382,144  | \$6,342,690  | \$5,652,587 |
| <b>Federal Funds</b>      | \$1,411,081 | \$1,339,039 | \$5,377,053  | \$3,417,090  | \$1,972,632 |
| <b>County/Other Funds</b> | \$272,198   | \$585,338   | \$1,928,546  | \$572,473    | \$448,646   |
| <b>Legal and Survey*</b>  | \$140,557   | \$160,601   | \$500,000    | \$250,000    | \$180,000   |
| <b>Total Funds</b>        | \$4,075,884 | \$4,432,630 | \$16,187,743 | \$10,582,253 | \$8,253,865 |
| <b>Cost per Acre**</b>    | \$1,321     | \$1,296     | \$1,671      | \$1,949      | \$2,474     |

Source: Delaware Department of Agriculture

\* State Funds

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

† FY 2018 totals are estimates because not all settlements have occurred as of publication.

‡ FY 2019 totals are estimates because not all settlements have occurred as of publication.

^ FY 2019 totals are estimates because no settlements have occurred as of publication.



## Young Farmer Loan Program

The Young Farmer Loan Program was established in FY 2012 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 three 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 thirty years. For example, if their private loan is twenty years, then they have ten 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.

**Table B.9 Young Farmer Loan Program, fiscal years 2017–2021**

|                          | FY 2017   | FY 2018   | FY 2019   | FY 2020   | FY 2021 |
|--------------------------|-----------|-----------|-----------|-----------|---------|
| <b>Farms Preserved</b>   | 5         | 1         | 1         | 1         | 0       |
| <b>Acres Preserved</b>   | 249       | 113       | 76        | 99        | 0       |
| <b>State Funds</b>       | \$889,330 | \$305,097 | \$290,888 | \$258,836 | 0       |
| <b>Legal and Survey*</b> | \$27,756  | \$4,399   | \$6,008   | \$6,071   | 0       |
| <b>Total Funds</b>       | \$917,086 | \$309,496 | \$296,896 | \$264,907 | \$0     |
| <b>Cost per Acre**</b>   | \$3,572   | \$2,700   | \$3,827   | \$2,615   | N/A     |

Source: Delaware Department of Agriculture

\* State Funds

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

## Forestland Preservation

The Forest Preservation Program was established in FY 2010, and nine forest tracts were preserved at that time, totaling 872 acres. The funding for these easements included state funding combined with funding from The Nature Conservancy, a private conservation organization. In FY 2021, four tracts were preserved totaling 432 acres.

**Table B.10 Total forest preservation easements, fiscal years 2010–2018, 2019, 2020, and 2021**

|                                | FY 2010–2018 | FY 2019** | FY 2020^  | FY 2021   |
|--------------------------------|--------------|-----------|-----------|-----------|
| <b>Forest Tracts Preserved</b> | 11           | 3         | 2         | 4         |
| <b>Acres Preserved</b>         | 928          | 140       | 122       | 432       |
| <b>State Funds</b>             | \$1,038,400  | \$113,234 | \$111,946 | \$393,064 |
| <b>Federal Funds</b>           | N/A          | N/A       | N/A       | \$0       |
| <b>Local Funds</b>             | N/A          | N/A       | \$9,500   | \$0       |

|                                   | FY 2010–2018 | FY 2019** | FY 2020^  | FY 2021   |
|-----------------------------------|--------------|-----------|-----------|-----------|
| <b>Private Conservation Funds</b> | \$412,403    | N/A       | N/A       | \$0       |
| <b>Legal &amp; Survey*</b>        | \$49,428     | \$8,500   | \$6,500   | \$12,000  |
| <b>Total Funds</b>                | \$1,500,231  | \$121,734 | \$127,946 | \$405,064 |

Source: Delaware Department of Agriculture

\* State Funds

\*\* FY 2019 totals are estimates because not all settlements have occurred as of publication.

^ FY 2020 totals are estimates because no settlements have occurred as of publication.

## Environment

### Community Water Quality Improvement Grant

The Community Water Quality Improvement Grant is an annually determined amount set aside in the Delaware Clean Water State Revolving Fund (CWSRF) Non-Federal Administrative Account. It requires a 25 percent cash match and must meet state insurance requirements. This grant is intended for projects to improve water quality as part of specific watershed improvement plans. It is meant for programs and projects that demonstrate innovative and sustainable methods, techniques, and/or practices for water quality improvements with cost effective and measurable results.

**Table B.11 Community water quality improvement grants, fiscal years 2017–2021**

| State Funds | FY 2017   | FY 2018   | FY 2019   | FY 2020   | FY 2021   |
|-------------|-----------|-----------|-----------|-----------|-----------|
| DNREC       | \$350,000 | \$250,000 | \$250,000 | \$250,000 | \$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.

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.

**Table B.12 Nonpoint Source Program Grant funding, fiscal years 2017–2021**

|                | FY 2017     | FY 2018     | FY 2019     | FY 2020     | FY 2021     |
|----------------|-------------|-------------|-------------|-------------|-------------|
| <b>State</b>   | \$843,709   | \$783,115   | \$783,115   | \$799,667   | \$822,134   |
| <b>Federal</b> | \$1,265,500 | \$1,174,612 | \$1,174,552 | \$1,199,500 | \$1,233,200 |
| <b>Total</b>   | \$2,109,209 | \$1,957,727 | \$1,957,667 | \$1,999,167 | \$2,055,334 |

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

## *Surface Water Matching Planning Grant*

The Surface Water Matching Planning Grant is designed to assist counties and municipalities to prepare surface water projects for funding through the Delaware Water Pollution Control Revolving Fund (WPCRF). The available funding can be used to assist with surface water planning in general and for specific project planning and designs necessary. The available funding can be used to assist with surface water planning in general and for specific project planning and designs necessary to submit a loan application to the WPCRF for funding consideration. In FY 2021, grants totaling \$250,000 were selected.

The grants support planning, preliminary engineering, and feasibility analysis of surface water improvement projects and activities that focus on the developed landscape to improve water quality in impaired watersheds in Delaware. They can be used for a variety of projects, such as:

- Retrofitting stormwater systems
- Establishing green technology practices
- Restoring streams and wetlands
- Studying watersheds
- Developing master surface water and drainage plans

**Table B.13 Surface Water Matching Planning Grant funding, Fiscal Years 2017–2021**

| State Funds | FY 2017   | FY 2018   | FY 2019   | FY 2020   | FY 2021   |
|-------------|-----------|-----------|-----------|-----------|-----------|
| DNREC       | \$350,000 | \$250,000 | \$250,000 | \$250,000 | \$250,000 |

## *Housing*

### *Homeownership*

DSHA continues to expand access to low rates and settlement assistance through various programs to help advance and sustain homeownership. The number of homebuyers using DSHA loan products increased significantly in calendar year 2020, with 2,289 homebuyers. This represented over \$480 million in mortgage loans for Delaware homebuyers. DSHA also continued to preserve homeownership by working with partners to support the rehabilitation of homes to ensure they are safe and habitable.

Building on efforts to promote responsible homeownership, DSHA continues to support pre-purchase homeownership counseling provided by Delaware HUD-certified housing counseling agencies, as well as foreclosure prevention counseling and financial assistance.

**Table B.14 DSHA Homeownership Programs, fiscal years 2017–2020<sup>^</sup>**

|  | FY 2017 | FY 2018 | FY 2019 | FY 2020 |
|--|---------|---------|---------|---------|
| <b>Homebuyers Assisted</b>                 | 806     | 963     | 1,259   | 1,432   |
| <b>Mortgage Assistance*<br/>(millions)</b> | \$196   | \$221   | \$253   | \$2,798 |
| <b>Homeownership Rehabilitation</b>        | 223     | 335     | 290     | 227     |

Source: Delaware State Housing Authority

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

<sup>^</sup> FY21 totals not available at time of publishing

## *Affordable Rental*

Demand for rental housing is incredibly high in Delaware, with the state having one of the lowest rental vacancy rates of all its neighbors. Delaware renters increasingly stretch their budgets to afford rent and utilities, and the impacts of COVID-19 on the incomes of the lowest-income households only exacerbated an affordable rental housing crisis. DSHA helps create and preserve affordable rental housing by offering federal and state financing for new construction and rehabilitation of affordable housing. The primary federal tool for this is the Low-Income Housing Tax Credit program (Housing Credit), which is leveraged by state investments in the Housing Development Fund (HDF). Through these tools, four projects with 196 units were assisted in FY 2021, including two projects creating supportive housing for special populations. Due to the long timing of application, underwriting, and construction, DSHA counts these projects as completed when they go to construction closing.

DSHA also serves as the Public Housing Authority (PHA) for Kent and Sussex Counties outside the City of Dover, administering federal public housing and Housing Choice Voucher assistance. DSHA owns and manages approximately 500 units of public housing and administers about 900 federal Housing Choice Vouchers.

DSHA also provides rental assistance to numerous special populations through partnerships with our sister state agencies and their providers. The largest of these is the State Rental Assistance Program (SRAP), created in partnership with DHSS and the Department of Services for Children, Youth and their Families to help Delawareans who require supportive services to live independently in their communities. It has been part of special initiatives to address veteran homelessness, family homelessness, and most recently supporting participants in the Group Violence Intervention (GVI) program. Under the SRAP base budget and other special partnerships to provide additional vouchers for particular populations, 785 households were receiving SRAP rental assistance at the end of FY 2021.

DSHA has also added several additional federal sources of rental assistance for special populations in recent years, and coordinates with other Public Housing Authorities in Delaware to effectively implement partnerships to support these.

**Table B.15 DSHA Rental Programs, fiscal years 2017–2020\***

|  | FY 2017 | FY 2018 | FY 2019 | FY 2020 |
|--|---------|---------|---------|---------|
| <b>Rental Units Produced or Preserved</b>                        | 345     | 230     | 242     | 204     |
| <b>Housing Development Fund &gt; (millions)</b>                  | \$10    | \$10    | \$10    | \$10    |
| <b>DSHA Public Housing &amp; Housing Choice Vouchers Managed</b> | 1,400   | 1,405   | 1,401   | 1,309   |
| <b>Rental Assistance for Special Populations</b>                 | 749     | 843     | 871     | 983     |

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

\* FY21 totals not available at time of publishing

### *Community Revitalization*

Strong partnerships, private investment, and public incentives continue to create new retail and downtowns, stimulating job growth, and improving the commercial vitality of our towns and cities. In FY 2021, \$10 million in Downtown Development District (DDD) funds were reserved for 17 large projects and are expected to leverage \$250 million in private investment. In addition, 55 small projects and five large projects were completed in FY 2021 receiving a total of \$2.6 million. Altogether, approximately \$12.5 million in DDD funds leveraged \$270 million in private investment.

DSHA continues to combine DDD investments with community interventions through the Strong Neighborhoods Housing Fund (SNHF). The SNHF is now established as a revolving fund to help redevelop vacant and blighted lots that can have a negative impact on an entire community. In FY21, the SNHF program awarded \$2.8 million to public and private partners in Wilmington, New Castle, Dover, and Laurel. DSHA looks forward to continuing to collaborate with public and private partners to support the revitalization and redevelopment of Delaware’s communities.

**Table B.16 DSHA Downtown Development District Rebate Program, fiscal years 2017–2021**

|                                      |           | FY 2017 | FY 2018 | FY 2019 | FY 2020 | FY 2021 |
|--------------------------------------|-----------|---------|---------|---------|---------|---------|
| <b>Downtown Development District</b> | Reserved  | \$6.6   | \$6.1   | \$10.9  | \$12.3  | \$10    |
| <b>Rebate *** Program (millions)</b> | Leveraged | \$172.1 | \$66.1  | \$231.4 | \$244   | \$250   |

\*\*\* Includes both small and large projects.

# Appendix C:

## Demographic Data

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The U.S. Census Bureau's latest population estimates indicate that Delaware had 973,764 residents in 2019, an increase of 75,830 or 8.4 percent since the 2010 Census. Among the counties, the estimates show Sussex County has the highest growth with 18.8 percent increase, or 37,080 residents since the 2010 count. Kent County also increased by 11.37 percent while New Castle County had the lowest growth rate at 3.77 percent.<sup>1</sup>

**Table C.1 U.S. Census population change, 2010–2019, Delaware and counties**

|                   | Population Projections |         | Change 2010–2019 |         |
|-------------------|------------------------|---------|------------------|---------|
|                   | 2010                   | 2019    | Net Change       | Percent |
| <b>Delaware</b>   | 897,934                | 973,764 | 75,830           | 8.4%    |
| <b>Kent</b>       | 162,310                | 180,768 | 18,458           | 11.37%  |
| <b>New Castle</b> | 538,479                | 558,753 | 20,274           | 3.77%   |
| <b>Sussex</b>     | 197,145                | 234,225 | 37,080           | 18.8%   |

Source: US Census Bureau, 2010 Census; US Census Bureau, 2019 ACS

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 long form in 2010 and thereafter by collecting long-form type information throughout the decade rather than only once every ten years. The ACS produces demographic, social, housing, and economic estimates in the form of one-year, three-year, and five-year estimates based on population thresholds. The strength of the ACS is in estimating population and housing characteristics.<sup>2</sup>

According to the Delaware Population Consortium (DPC), Delaware's population is projected to grow by over 155,000 between 2010 and 2050, an increase of 17.3 percent, reaching a projected population of just over 1 million. Sussex County is expected to see the largest percent increase in population by 51.3 percent. Kent County's population is projected to reach 189,562 by 2050, an increase of 16.3 percent. New Castle County is expected to grow by 5.12 percent over the same period, adding just over 27,000 to reach a 2050 population of 566,364.

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<sup>1</sup> US Census, Annual Estimates of Residential Populations, 2010–2019. Note that 2019 is the most recent data available at this time.

<sup>2</sup> Adapted from the U.S. Census Bureau's American Factfinder website glossary, <https://factfinder.census.gov/help/en/index.htm#glossary.htm>

**Table C.2 Delaware population projections: 2010–2050**

|                   | Population Projections |           | Change 2010–2050 |         |
|-------------------|------------------------|-----------|------------------|---------|
|                   | 2010                   | 2050      | Net Change       | Percent |
| <b>Delaware</b>   | 899,600                | 1,055,289 | 155,689          | 17.3%   |
| <b>Kent</b>       | 162,955                | 189,562   | 26,607           | 16.3%   |
| <b>New Castle</b> | 538,753                | 566,364   | 27,611           | 5.12%   |
| <b>Sussex</b>     | 197,892                | 299,363   | 101,471          | 51.3%   |

Source: Delaware Population Consortium, Release Date: October 31, 2020.

The DPC projections indicate that the percentage of school-aged children will gradually decrease from 24.26 percent in 2015 to 20.62 percent in 2050. During the same period the projections indicate that the percentage of adults 65-years-old or older will increase from 14.46 percent to almost 25 percent. Delaware is projected to become more diverse as well, with the white population projected to decrease from 63.33 percent in 2015 to just under 50 percent by 2050.

Delaware is projected to have 42,292 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.

**Table C.3 Demographic projections for State of Delaware**

|                         | 2010    | 2015    | 2020    | 2025      | 2030      | 2035      | 2040      | 2045      | 2050      |
|-------------------------|---------|---------|---------|-----------|-----------|-----------|-----------|-----------|-----------|
| <b>Total Population</b> | 899,600 | 941,260 | 979,920 | 1,003,843 | 1,024,158 | 1,040,111 | 1,050,497 | 1,055,144 | 1,055,289 |
| <b>% School Age</b>     | 25.93%  | 24.26%  | 23.37%  | 22.48%    | 21.55%    | 21.01%    | 20.76%    | 20.68%    | 20.62%    |
| <b>% 65+</b>            | 14.46%  | 16.73%  | 18.99%  | 21.46%    | 23.61%    | 24.72%    | 24.85%    | 24.64%    | 24.88%    |
| <b>Households</b>       | 328,808 | 349,289 | 365,712 | 376,689   | 385,336   | 391,495   | 394,312   | 394,328   | 391,581   |
| <b>% White</b>          | 65.38%  | 63.33%  | 61.27%  | 59.24%    | 57.27%    | 55.29%    | 53.29%    | 51.39%    | 49.62%    |
| <b>% Black</b>          | 20.92%  | 21.46%  | 22.18%  | 22.90%    | 23.54%    | 24.16%    | 24.80%    | 25.49%    | 26.21%    |
| <b>% Hispanic</b>       | 8.19%   | 8.86%   | 9.74%   | 10.49%    | 11.23%    | 11.97%    | 12.68%    | 13.30%    | 13.81%    |
| <b>% Other Race</b>     | 5.51%   | 6.35%   | 6.82%   | 7.37%     | 7.96%     | 8.59%     | 9.22%     | 9.83%     | 10.35%    |

Source: Delaware Population Consortium, Release Date: October 31, 2020.



# Appendix D: Comprehensive Planning Progress

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Since September 2021, the Governor has certified eight comprehensive plans. These include Bellefonte, Elsmere, Delmar, Frankford, Millsboro, Selbyville, Georgetown, and the City of New Castle.

The Office of State Planning Coordination (OSPC) is currently working with 13 municipalities and one county that are in the process of updating their plans.

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

The following table shows the 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  | Extension<br>Granted Until |
|---------------|------------|--|------------|----------------------------|
| 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 | Certified  | 04/30/2021 |                            |
| Delaware City | New Castle | Update in progress; PLUS review 11/2019                  | 11/24/2008 | 5/29/2020                  |
| Elsmere       | New Castle | Certified  | 5/31/2021  |                            |
| Middletown    | New Castle | Update in progress; Due 9/2022                           | 09/10/2012 |                            |
| Newark        | New Castle | No activity  | 1/5/2017   |                            |
| New Castle    | New Castle | Certified  | 12/12/2020 |                            |
| Newport       | New Castle | No activity  | 12/18/2014 |                            |
| Odessa        | New Castle | No activity  | 10/01/2012 |                            |
| Townsend      | New Castle | Update in progress; Pre-Update 6/2021; extension pending | 07/07/2010 | 7/2021                     |
| Wilmington    | New Castle | No activity  | 12/12/2019 |                            |

| <b>Municipality</b>  | <b>County</b>      | <b>Latest Planning Activity</b>  | <b>Certified</b> | <b>Extension<br/>Granted Until</b> |
|----------------------|--------------------|--|------------------|------------------------------------|
| New Castle<br>County |                    | Several ordinances reviewed:<br>Planning underway for update –<br>Due 7/1/2022 | 7/1/2012         |                                    |
| Bowers Beach         | Kent               | Certified  | 12/3/2020        |                                    |
| Camden               | Kent               | No activity  | 5/6/2019         |                                    |
| Cheswold             | Kent               | Certified  | 8/2/2021         |                                    |
| Clayton              | Kent               | No activity  | 1/14/2019        |                                    |
| Dover                | Kent               | Plan amendment reviewed  | 1/13/2020        |                                    |
| Farmington           | Kent               | No activity  | 1/19/2016        |                                    |
| Felton               | Kent               | Plan amendment reviewed  | 11/5/2018        |                                    |
| Frederica            | Kent               | No activity  | 9/2/2016         |                                    |
| Harrington           | Kent               | No activity  | 12/16/2013       |                                    |
| Hartly               | Kent               | Update in progress   | 8/10/2016        |                                    |
| Houston              | Kent               | No activity  | 7/12/2018        |                                    |
| Kenton               | Kent               | No activity  | 1/5/2017         |                                    |
| Leipsic              | Kent               | No activity  | 5/6/2019         |                                    |
| Little Creek         | Kent               | No activity  | 11/2/2016        |                                    |
| Magnolia             | Kent               | No activity  | 3/11/2019        |                                    |
| Viola                | Kent               | No activity  | 3/18/2019        |                                    |
| Woodside             | Kent               | No activity  | 11/13/2018       |                                    |
| Wyoming              | Kent               | Update in progress   | 05/02/2011       |                                    |
| Milford              | Kent/Sussex        | Plan amendment reviewed  | 1/22/2018        |                                    |
| Smyrna               | Kent/New<br>Castle | Certified  | 7/19/2021        |                                    |
| Kent County          |                    | Updating zoning ordinance  | 9/11/2018        |                                    |
| Bethany Beach        | Sussex             | No activity  | 2/17/2012        |                                    |
| Bethel               | Sussex             | Update in process  | 07/08/2008       |                                    |
| Blades               | Sussex             | Update in process; reviewed<br>through PLUS 7/2019                             | 04/17/2008       | 5/30/2019                          |
| Bridgeville          | Sussex             | No activity  | 9/10/2018        |                                    |
| Dagsboro             | Sussex             | No activity  | 1/27/2020        |                                    |
| Delmar               | Sussex             | Certified  | 3/1/2021         |                                    |
| Dewey Beach          | Sussex             | No activity  | 9/15/2018        |                                    |
| Ellendale            | Sussex             | Update in progress; PLUS<br>review 6/2021                                      | 10/06/2009       | 12/6/2021                          |
| Fenwick Island       | Sussex             | No activity  | 10/26/2017       |                                    |
| Frankford            | Sussex             | Certified  | 12/7/2020        |                                    |
| Georgetown           | Sussex             | Certified  | 07/14/2021       |                                    |

| <b>Municipality</b> | <b>County</b> | <b>Latest Planning Activity</b>           | <b>Certified</b> | <b>Extension<br/>Granted Until</b> |
|---------------------|---------------|---|------------------|------------------------------------|
| Greenwood           | Sussex        | No activity                               | 6/29/2019        |                                    |
| Henlopen Acres      | Sussex        | Updated 2016, not certified               | 07/09/2004       |                                    |
| Laurel              | Sussex        | No activity                               | 4/22/2018        |                                    |
| Lewes               | Sussex        | Plan amendment reviewed                   | 10/16/2017       |                                    |
| Millsboro           | Sussex        | Certified                                 | 2/3/2021         |                                    |
| Millville           | Sussex        | No activity                               | 10/8/2019        |                                    |
| Milton              | Sussex        | No activity                               | 12/4/2018        |                                    |
| Ocean View          | Sussex        | No activity                               | 3/10/2020        |                                    |
| Rehoboth            | Sussex        | Update in progress                        | 07/23/2010       | 7/9/2022                           |
| Seaford             | Sussex        | Update in progress; PLUS<br>Review 6/2021 | 01/12/2010       | 9/21/2021                          |
| Selbyville          | Sussex        | Certified                                 | 8/13/2020        |                                    |
| Slaughter Beach     | Sussex        | No activity                               | 10/8/2018        |                                    |
| South Bethany       | Sussex        | No activity                               | 07/27/2017       |                                    |
| Sussex County       |               | Plan amendments reviewed                  | 3/19/2019        |                                    |

# Appendix E: Highlights from Local Jurisdictions' Annual Reports

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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 August 15, 2021, 44 municipalities and three 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, five have noted that plan amendments may be needed at this time, 21 are working on or have recently updated their ordinances or zoning code, eight municipalities are considering bike and/or pedestrian walkway plans or trails, and four are working to create a master plan or continue to move forward with an adopted master plan. In addition, 20 local jurisdictions have identified issues that they feel could require technical assistance from the OSPC. In addition, this year we asked the municipalities if there were resiliency opportunities we could help with and 14 towns identified potential opportunities to partner with the State.

## *New Castle County*

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| New Castle County | The county completed their Bike Master Plan in 2020. In addition, the county has re-established the comprehensive planning unit within the Department of Land Use. The county is beginning their comprehensive plan update.  |
| Bellefonte        | Bellefonte's plan was certified by the Governor on April 30, 2021.   |
| Elsmere           | The town recently updated their comprehensive plan. The plan was certified by the Governor in July 2021.   |
| Middletown        | The town is currently updating their comprehensive plan. In addition, the town is upgrading water and sewer utilities in the older sections of town. Middletown was recently designated as a Downtown Development District (DDD), and they have utilized this designation to begin revitalization of the downtown. |

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| Newark     | The city is working on a five-year review of their comprehensive plan. In addition, the city is working to adopt a Transportation Improvement District.   |
| New Castle | The city plan was certified by the Governor in December 2020.   |
| Newport    | The town reported that they have kept all employees working since the outbreak of the pandemic.   |
| Odessa     | The town is reviewing the zoning ordinance and will begin their comprehensive plan update soon.   |
| Townsend   | The town has completed phases one and two of the streetscape project. The town is currently updating their plan, which will include a 30-year plan for annexation and development   |
| Wilmington | The city recently completed an update to the subdivision review process to make it more efficient. In addition, the South Market Street Master Plan has been released. Wilmington is designated as a DDD and continues to utilize this program to revitalize the downtown areas including projects for commercial and rental housing. |

### *Kent County*

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| Kent County  | The county adopted master plans for Little Heaven and Frederica; drafted a master plan zoning ordinance; and finished the third draft of a zoning ordinance revising permitted uses and bulk regulations. In addition, the county initiated Transportation Improvement District studies in northern part of the county as well as Little Heaven and Frederica. |
| Bowers Beach | The town applied for and received funding to dredge and maintain the channel and install a rock jetty on the south side of the Murderkill River Entrance.  |
| Camden       | Camden continues to grow with a new apartment complex and several new businesses. In addition, the town is working to update their zoning ordinance.   |
| Cheswold     | The town is currently in the final phase of updating their plan.   |
| Clayton      | The town dedicated a new Veterans Park on August 1, 2020. Clayton is a designated DDD city and has been utilizing that program to continue to revitalize their downtown area.  |
| Dover        | The city completed the required comprehensive rezoning and comprehensive plan amendments. The city applied for and received a grant from the Delaware Department of Agriculture under the Delaware Urban and Community Tree Program for continued care and maintenance of its urban forest, especially to replace damaged trees in City Parks and to add       |

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|              | trees along Williams Street. Dover is a designated as a DDD city and has been utilizing that program to continue to revitalize their downtown area.  |
| Felton       | The town reported one annexation of approximately three acres.   |
| Harrington   | The city continues to work toward the development of property that would increase rail access along Cluckey Drive. In addition, the city continues to utilize their DDD designation to revitalize their downtown area.   |
| Hartly       | The town has reported that the replacement of sidewalks along Arthursville Road is underway.   |
| Kenton       | The town is working to establish a zoning ordinance for the town.  |
| Leipsic      | The Town, with funding from a state grant, purchased 2.81 acres of open space for a park.  |
| Little Creek | The town is working on a project with the University of Delaware to redevelop an existing, but vacant commercial area into an area with Kayak rentals, a produce stand, and various other commercial uses.   |
| Magnolia     | With funding assistance from the Department of Health and Social Services, the town has begun upgrading water mains.   |
| Milford      | The city continues to work with DelDOT on a Southeast Traffic Improvement District. In addition, they are updating the City's Bike Master Plan.  |
| Smyrna       | The town is currently updating their comprehensive plan. In addition, the town has adopted ordinances over the past year to enhance economic development incentives, slum clearance, and redevelopment. Smyrna is working to begin the process of reviewing their impact fee structure. Smyrna is a designated DDD area and continues to utilize the program to help revitalize the downtown area. |
| Viola        | The town purchased a church in 2018 and has been working to convert the building into a town hall and police station.  |
| Wyoming      | The town is currently updating their comprehensive plan.   |

### *Sussex County*

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| Sussex County | The Henlopen TID has been approved. The county is working with state agencies to improve interconnectivity, master planning, and environmental protection. Several comprehensive plan amendments were reviewed this past year. |
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| Bethany Beach  | The town is working with state and federal agencies on a beach replenishment project. In addition, the town has begun the update of their comprehensive plan.   |
| Bridgeville    | While construction, in general, has not slowed, growth in Heritage Shores has been steadily increasing, and the town is seeing an increased demand for housing and businesses to sustain the residents. The end of the town-owned wastewater system (now part of the Western Sussex Unified Sewer District) as of July 1, 2021, has also alleviated a large amount of financial burden and resources that will now enable the town to refocus on other goals and departments. |
| Dagsboro       | The town has continued to grow with 10 new residential units and 32 permits for renovations. In addition, they are currently reviewing a mixed-use (residential and commercial) site plan.  |
| Delmar         | The comprehensive plan was certified in March 2021. In addition, the town has completed the installation of water and wastewater mains along Old State Road, extending those services to the Highway/Regional parcels that face U.S. 13 North.  |
| Dewey Beach    | The town adopted modifications to the building code relating to maximum building size. In addition, the town completed a living shoreline in 2020 and after completing a stormwater infrastructure database, the town approved money for repairs to stormwater facilities.  |
| Ellendale      | The town is currently updating their comprehensive plan. The plan has been reviewed by state agencies, and the town is working to make the required changes before certification.   |
| Fenwick Island | The town received a grant from the state's bond bill for sidewalk installation covering a five-block area. The town's dredging committee has progressed with plans to dredge Little Assawoman Bay. In addition, the town partnered with other coastal towns and DNREC to review impervious surface coverages, mitigation options, and create a model ordinance to control impervious surface coverage.  |
| Frankford      | The comprehensive plan was certified in April 2021. In addition, the town reported that they have formed a charter and ordinance committee to research the opportunity for publishing their town code and charter online.   |
| Georgetown     | The town is currently updating their comprehensive plan. In addition, the town has acquired land to be used as a future trailhead and parking area for the bike trail. Georgetown continues to utilize their DDD designation for the downtown area.   |



|                |   |
|----------------|---|
| Greenwood      | The Town has begun having a farmers' market once a month.   |
| Henlopen Acres | The town has made amendments to their code relating to fireworks and solar installation. The town's comprehensive plan is nearing its five-year mark since adoption, and the town is working to determine if changes are needed.  |
| Laurel         | The town has adopted a vacant housing ordinance. In addition the town has been working with Habitat for Humanity, Milford housing, and the Laurel Redevelopment Corporation to renovate homes in the area of the Ramble. The town continues to utilize the DDD to revitalize the downtown area, and over the past year there has been several owner-occupied homes constructed within the town. |
| Lewes          | The city is working with DelDOT regarding traffic at Five Points. In addition, Lewes partnered with the Board of Public Works (BPW) and Sussex County to purchase 30 acres of open space and protect the city's wellfields.   |
| Millsboro      | The town's comprehensive plan was certified by the Governor in February 2021. The town continues to make improvements to water and wastewater utilities and is in the planning process for major upgrades to the town's wastewater system.  |
| Milton         | The town continues to implement their plan. Recently two annexations were processed and approved.   |
| Ocean View     | The town is partnering with DelDOT for several pedestrian safety issues. In addition, the town has leveraged partnerships with the private sector to enhance their opportunities for additional outdoor recreation.   |
| Rehoboth       | The city is currently updating their comprehensive plan. The city has completed phase two of the Lake Avenue project and will soon begin a streetscape project on Wilmington/Baltimore Avenue.  |
| Seaford        | The city recently completed their first façade improvement grant in the DDD area. In addition, the city broke ground on the Western Sussex Business Campus. Seaford continues to utilize the DDD program to improve the downtown and surrounding areas.   |
| Selbyville     | The town received funding through the State's Parks and Recreation Section of DNREC to install a new pickleball court in their existing park. They are also working to renovate the existing buildings at the park to use for storage and bathrooms.  |
| South Bethany  | The town is currently working on the five-year review of their plan.  |

# Appendix F: Downtown Development District Tables

Downtown Development District (DDD) summary report (FY 2015 – FY 2021), ending June 30, 2021.

**Table F.1 DDD Rebates Issued To-Date by Eligible Use**

|                             | Total<br>Development Cost<br>(TDC) | Qualified Real<br>Property Investment<br>(QRPI) | Rebate              | #          |
|-----------------------------|------------------------------------|---|---------------------|------------|
| <b>Large Projects</b>       |                                    |   |                     |            |
| Commercial                  | \$98,043,836                       | \$77,727,069                                    | \$5,298,268         | 16         |
| Mixed Use                   | \$146,390,428                      | \$91,174,361                                    | \$7,314,856         | 21         |
| Residential                 | \$37,235,556                       | \$24,235,665                                    | \$2,348,745         | 7          |
|                             | <b>\$281,669,820</b>               | <b>\$193,137,095</b>                            | <b>\$14,961,869</b> | <b>44</b>  |
| <b>Small Projects</b>       |                                    |   |                     |            |
| Commercial                  | \$8,972,700                        | \$5,785,196                                     | \$1,152,599         | 46         |
| Mixed Use                   | \$5,143,306                        | \$4,270,888                                     | \$814,913           | 22         |
| Residential                 | \$16,453,261                       | \$12,357,314                                    | \$2,466,410         | 123        |
|                             | <b>\$30,569,267</b>                | <b>\$22,413,398</b>                             | <b>\$4,433,922</b>  | <b>191</b> |
| <b>Large/Small Projects</b> |                                    |   |                     |            |
| Commercial                  | \$107,016,536                      | \$83,512,265                                    | \$6,450,867         | 62         |
| Mixed Use                   | \$151,533,734                      | \$95,445,249                                    | \$8,129,769         | 43         |
| Residential                 | \$53,688,817                       | \$36,592,979                                    | \$4,815,155         | 130        |
|                             | <b>\$312,239,087</b>               | <b>\$215,550,493</b>                            | <b>\$19,395,791</b> | <b>235</b> |

**Table F.2 DDD Rebates Issued To-Date by Activity**

|                       | TDC                  | QRPI                 | Rebate              | #          |
|-----------------------|----------------------|----------------------|---------------------|------------|
| <b>Large Projects</b> |                      |                      |                     |            |
| New Construction      | \$94,820,529         | \$76,119,787         | \$4,069,910         | 10         |
| Rehab-Existing        | \$186,849,291        | \$117,017,308        | \$10,891,959        | 34         |
|                       | <b>\$281,669,820</b> | <b>\$193,137,095</b> | <b>\$14,961,869</b> | <b>44</b>  |
| <b>Small Projects</b> |                      |                      |                     |            |
| New Construction      | \$9,919,870          | \$7,834,040          | \$1,562,596         | 66         |
| Rehab-Existing        | \$20,649,397         | \$14,579,358         | \$2,871,325         | 125        |
|                       | <b>\$ 30,569,267</b> | <b>\$ 22,413,398</b> | <b>\$ 4,433,921</b> | <b>191</b> |

| <i>Large/Small Projects</i> | <b>TDC</b>           | <b>QRPI</b>          | <b>Rebate</b>       | <b>#</b>   |
|-----------------------------|----------------------|----------------------|---------------------|------------|
| New Construction            | \$104,740,399        | \$83,953,827         | \$5,632,506         | 76         |
| Rehab-Existing              | \$207,498,688        | \$131,596,666        | \$13,763,284        | 159        |
|                             | <b>\$312,239,087</b> | <b>\$215,550,493</b> | <b>\$19,395,790</b> | <b>235</b> |

**Table F.4 FY 2021 Large Project Reservations**

|           |           | <b>TDC</b>           | <b>DDD Reservation</b> |
|-----------|-----------|----------------------|------------------------|
| R12 F2020 | 9         | \$77,882,668         | \$4,714,142            |
| R11 S2020 | 8         | \$171,644,142        | \$5,258,490            |
|           | <b>17</b> | <b>\$249,526,810</b> | <b>\$9,972,632</b>     |

**Table F.5 FY 2021 Large and Small Project Rebates**

|            |           | <b>TDC</b>          | <b>DDD Rebate</b>  |
|------------|-----------|---------------------|--------------------|
| SP Rebates | 55        | \$9,983,035         | \$1,271,708        |
| LP Rebates | 5         | \$10,209,326        | \$1,214,341        |
|            | <b>60</b> | <b>\$20,192,361</b> | <b>\$2,486,049</b> |

**Table F.6 Total Activity FY 2020 only**

|           | <b>TDC</b>           | <b>DDD Rebate</b>   |
|-----------|----------------------|---------------------|
| <b>77</b> | <b>\$269,719,171</b> | <b>\$12,458,681</b> |

