Delaware **Together**

Building on Tradition, Planning for Tomorrow

City of Delaware
Comprehensive Plan

May 10, 2021



Adopted

May 10, 2021

Ordinance 21-21

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LETTER TO THE COMMUNITY

On behalf of the City of Delaware community, the Delaware Together Steering Committee presents Delaware Together – Building on Tradition, Planning for Tomorrow.

Delaware Together is our community's Comprehensive Plan. It reflects ideas and insights for the future and is the broadest public policy document a community can create. It expresses the values and aspirations of who and what we want to become as a community over the next 10-15 years.

This Plan replaces the current Comprehensive Plan which has served the community well since 2003. Many of the core values, goals, and recommendations are still valid but trends, priorities, and needs change over time. This new Plan will help shape and direct growth and development, focus activities on key locations within our existing utility boundary, and align fiscal resources with the Plan.

The document incorporates input collected over more than two years from a wide range of community members and stake holders. It integrates more than 2,000 comments from our friends and neighbors with insights from technical analysis on a range of topics, including character and land use, economic development, housing, transportation, parks and recreation, and much more.

The Comprehensive Plan was developed thoughtfully and deliberately. The 31-person Steering Committee was carefully selected by City Council to reflect diverse backgrounds, interests, and areas of the City itself. It has resulted in 6 high-level goals, almost 60 objectives, and over 230 specific Actions (recommendations) that will be pursued, monitored, and adjusted as needed over time. It is meant to be a living document that will be revisited through the years and can be modified as needed while its core vision and goals continue to guide decision-making.

Outcomes can be measured individually, but the plan also leverages the potential for synergies between the individual recommendations. For example, land use decisions directly relate to fiscal health, providing housing opportunities in a broad spectrum, reflect the overall quality of life in the community, and the City's distinctive character. Each investment in the local economy has implications for jobs, personal prosperity, and more. Every action taken to promote quality housing that meets the population needs also relates to jobs, commuting patterns, the ability of the City to attract a diverse population and the potential to accommodate a range of housing choice. Where and how people live and work - as well as how much they benefit from being part of and contributing to the Delaware community - are all interwoven elements of the overall community Plan.

We want to thank every community member who offered their time and ideas to Delaware Together. We look forward to our continued collaboration over the coming years as we move through the hard work to implement this plan.

The City of Delaware is a great place, with a wonderful history, and exciting future. It will take each of us working individually and collectively to bring the Plan to reality in our ongoing effort to make Delaware the best it can be.

Sincerely,

Delaware Together Steering Committee

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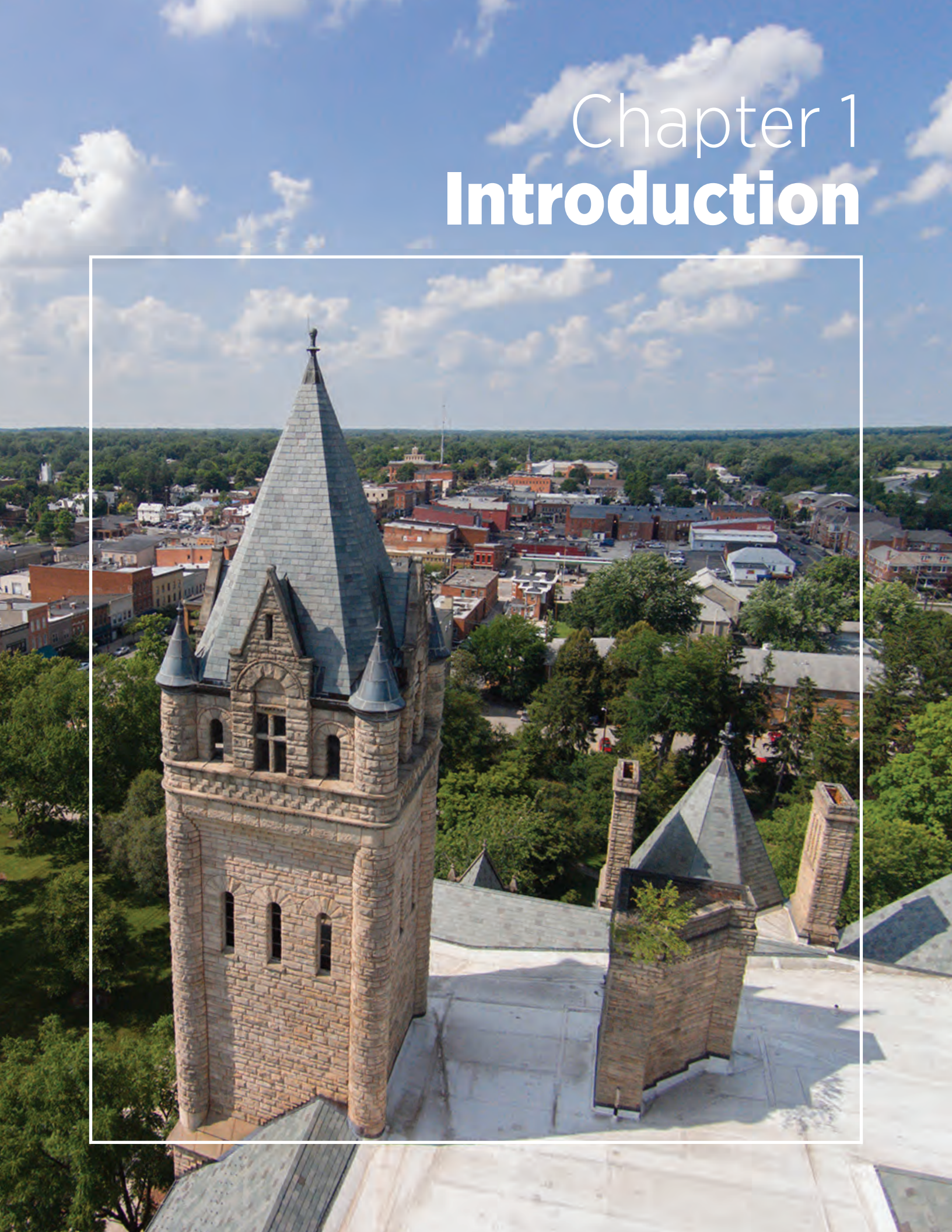
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Chapter 1
Introduction



1. INTRODUCTION

The Delaware Together planning process was designed to create a new city-wide plan for the City of Delaware that reflects community ideas and insights for the future. The resulting comprehensive plan puts forth a vision for the community for both the near and long term. This chapter presents why the process of creating a plan for the City was important to undertake, outlines the process, and highlights key actions recommended in the plan.

ASSETS AND OPPORTUNITIES

The City of Delaware is in an enviable position relative to many other communities in the central Ohio region and the state. Known as a well-maintained and family-oriented community, Delaware has both a rich history and a supportive environment for new business and ideas. The City boasts a vibrant downtown and attractive neighborhoods, strong school districts and a location in a growing region with a strong economic base. But Delaware also faces challenges: maintaining affordability in a rising national housing market, building housing options that match changing preferences, attracting and supporting people of all age groups, responding to changing market conditions, and balancing new development with a preservation of the City's authentic character. All of these factors have been considered in preparing this plan, in addition to the dynamic conditions during the ongoing COVID-19 pandemic as well as national calls for racial justice that have reverberated locally in communities throughout central Ohio.



The mindset of the Delaware City Council is to think strategically about the future of the City. Four main pillars were identified as important to the future of the City of Delaware. This plans aims to reinforce these pillars.

PLAN ORGANIZATION

This plan is organized into 8 chapters:

1. Introduction
2. Ideas and Input
3. Conditions and Trends
4. Development Framework
5. Character and Land Use
6. Fiscal Sustainability
7. Goals, Objectives and Actions
8. Implementation

Appendices

WHAT IS A COMPREHENSIVE PLAN?

A comprehensive plan is a long-term guide that expresses the values and aspirations of a community. It is the broadest public policy document a community can create for its future physical development. It considers the input of residents, workers, and other stakeholders. The plan helps the City respond to change and acts as a guidebook for decision-makers. It can also serve as a marketing tool to clearly convey the community's value and priorities for the City.

To achieve the vision and goals, the plan includes specific actions (projects, policies and programs) and identifies timing and responsibility for undertaking those actions. It also contains map-based recommendations through a Character and Land Use Plan broken into existing Character Areas (areas generally expected to maintain their existing characteristics over the next decade) and Focus Areas (areas where significant change is anticipated). These components of the plan help to answer critical questions regarding how the City should manage growth and new development.

WHY UPDATE THE PLAN?

Regular comprehensive planning is good stewardship and establishes a foundation for well-supported policies to create the best possible future. The existing (2003-2008) comprehensive plan provides an important foundation for this plan. Many of its values, goals and recommendations are still valid today. However, the existing plan for the City needed to be updated to reflect current trends while being focused on emerging priorities. Delaware Together focused on maintaining the City's position as a desirable place in which to live, work, play, and invest for the next ten years — and beyond.

RELATED STUDIES AND PLANS

Following are some of the documents that have informed Delaware Together:

- Access Delaware (2019)
- Building Industry Association of Central Ohio Housing Need Assessment (2018)
- Bicycle and Pedestrian Master Plan (2017)
- City Branding (2017)
- Delaware County Community Health Assessment (2018)
- Insight 2050 (2015)
- MORPC Corridors Study (2019)
- MORPC Regional Housing Strategy (2020)
- Recreation Needs Assessment (2020)
- Parks and Recreation Plan (2017)
- Route 23 Corridor Strategic Guide (2019)
- Sewer and Water Master Plans (2017)
- Thoroughfare Plan (2002)
- Trail System Master Plan (2017)

In addition, the following documents have been prepared in association with this comprehensive plan.

- Economic Baseline Report
- Southwest Industrial Analysis
- Residential Market Analysis
- Fiscal Sustainability Audit

See Appendix for full documents.

WHO WAS INVOLVED?

Fundamentally, this is the community's plan. Throughout the process, community members were engaged and offered hundreds of ideas that helped to shape the plan's actions. A summary of those involved in the plan is provided below.

CITY STAFF

Coordination

- City staff supported and helped to coordinate the work of all other groups and provided local knowledge and expertise to each element of the plan.

STEERING COMMITTEE

Process and outreach

- A 31 member citizen Steering Committee helped guide the public process and creation of the plan's recommendations. Members were selected to reflect the City's diverse backgrounds and interests through an open application process.

ELECTED OFFICIALS

Guidance and Adoption

- Elected officials were updated throughout the process and the final plan was formally adopted by the Planning Commission and City Council.

PUBLIC

Input and feedback

- In-person workshops held in different locations throughout the City and online surveys offered a variety of ways for the community to give input throughout the process.

STAKEHOLDERS

Targeted input

- Various stakeholder groups were consulted to inform specific aspects of the plan, including business leaders, civic leagues, advocacy organizations, real estate professionals and developers, education professionals, students, young professionals and industry representatives, among others.

CONSULTANTS

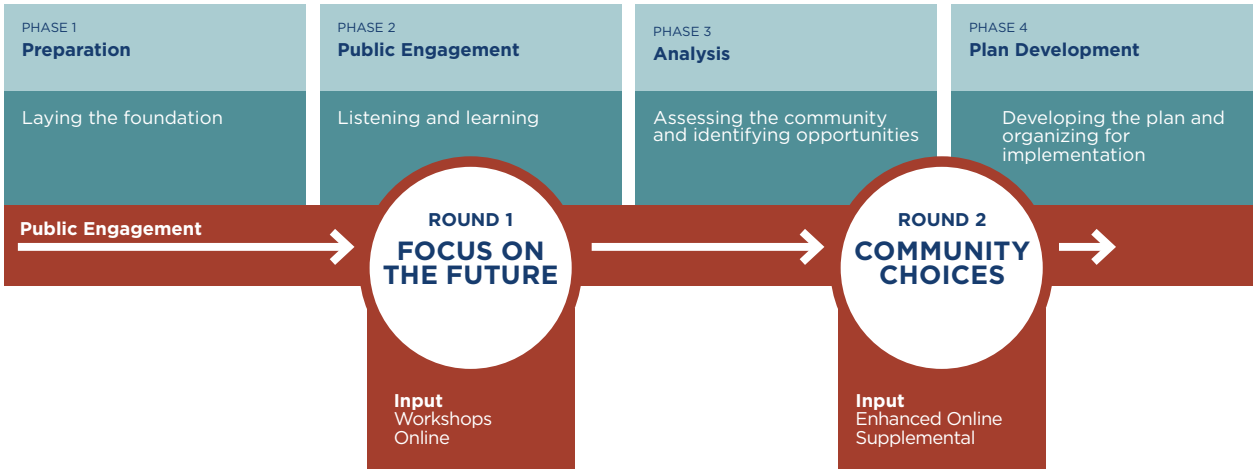
Process leadership and expertise

- A consultant team facilitated the process, conducted technical analysis and integrated experience from other successful communities in Ohio and nationwide.

WHAT WAS THE PROCESS?

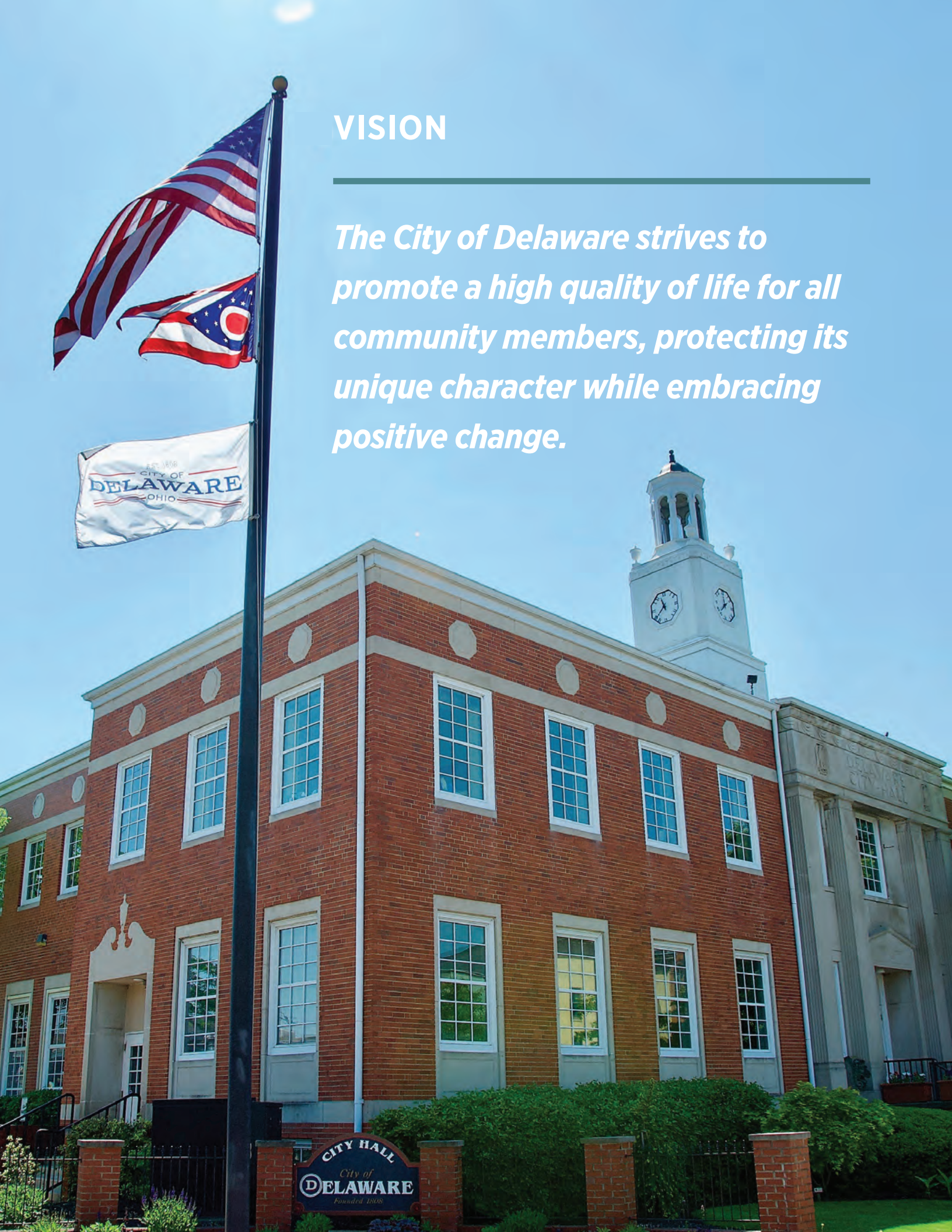
The plan was developed through a process that integrated input from community members and key stakeholders with technical analysis. The process began in early 2018 and culminated in Winter 2021.

PROCESS DIAGRAM



VISION

The City of Delaware strives to promote a high quality of life for all community members, protecting its unique character while embracing positive change.



GOALS

Building off of the vision, the plan's goals articulate the highest level of desired outcomes for the plan.

STRUCTURE OF RECOMMENDATIONS

This plan includes six goals, which reflect themes from community input. Each goal is supported by several objectives that organize the plan's 235 actions.

GOALS

Intended results expressed in non-technical terms for the plan's six topic areas. These represent overarching desired outcomes for the plan.

OBJECTIVES

Sub-themes within the goals that serve to organize actions.

ACTIONS

Projects, policies or programs that are recommendations to be implemented.

A. MANAGE GROWTH AND CHANGE

> Direct, design and encourage new development to promote compatible land uses, create strong quality of place including a mix of uses where appropriate, support fiscal health and promote sustainability.

B. ADVANCE ECONOMIC PROSPERITY

> Provide economic opportunity for all residents and support diverse, successful and resilient business and industry.

C. BUILD SOCIAL COHESION AND EQUITY

> Foster Delaware's sense of community across geographies, income categories and demographic groups and provide stable foundations for a high quality of life.

D. PROMOTE HOUSING QUALITY AND VARIETY

> Ensure a broad spectrum of housing options to meet the current and future needs of the population.

E. LEVERAGE RESOURCES, INFRASTRUCTURE AND AMENITIES

> Preserve and enhance key historic buildings and neighborhoods, natural areas and open spaces, transportation and mobility options, and quality facilities and services.

F. ENSURE FISCAL SUSTAINABILITY

> Promote development, land use, infrastructure and other policies that will support a healthy fiscal position.

Chapter 2
Ideas and Input



2. IDEAS AND INPUT

To ensure that the planning process for Delaware Together was open, inclusive, and transparent, a robust public engagement process was conducted with the help of a representative Steering Committee.

ROBUST, MULTIFACETED ENGAGEMENT

The Delaware Together process drew heavily from community ideas and insight. Central to the work was a 31 member Steering Committee representing a range of interests from throughout the City. This group provided substantive guidance and played a critical role in conducting outreach to the broader public.

There were two phases of public engagement throughout the planning process. In each phase, technical analysis was shared with the public and public input also helped to shape the technical analysis. Focus on the Future Workshops were held to stimulate big-picture thinking about the City in September 2018. Due to the COVID-19 pandemic a second round of engagement was conducted primarily through online activities. This provided a chance to share draft plan components and solicit feedback.

Supplemental engagement included presentations to City Council, self-guided engagement activities at venues throughout the City and focus groups.

OVERALL MEETING SATISFACTION

>99%

Nearly all participants who responded to exit questionnaires said they felt that their voices were heard.

"Loved hearing what others shared and having a dialogue about the possibilities/ opportunities"

Workshop participant





Collateral materials were designed around a coherent brand and a website was established as the main "hub" for information about the process and ways to get involved.



The public engagement process targeted key interst groups like the Citizens Academy as a supplemental engagement opportunity.



Focus on the Future workshops were held throughout the City to ensure the process cast a wide net to reach community members.







STEERING COMMITTEE

Thirty-one members of the Delaware community were selected to provide key guidance and insight as part of the Delaware Together Steering Committee. After a broadly-advertised open call to community members, the final committee selection was made from over 90 submitted applications. Those who were not selected were invited to participate in public engagement.

Applicants were selected considering their interests, skills, demographic characteristics (age, gender, etc.) and places of residence. The goal was to bring a cross section of the Delaware community representing a diversity of relevant perspectives to the table. The committee was made up of 16 men and 16 women, with ages ranging from the early 20s to over 65. In addition to the age and gender diversity, each ward of Delaware had at least seven representatives on the committee.

The committee guided the public process and helped to shape the plan's recommendations. It acted as spokespersons for the planning effort, played a critical role in conducting public outreach, and provided direction feedback to the planning team at crucial moments in the process. The Steering Committee held 11 official meetings (including two virtual meetings due to COVID-19), and many members took on facilitation roles at

FOCUS ON THE FUTURE WORKSHOPS

The first round of public workshops were conducted early on in the Delaware Together planning process and were used to gather input from the community through both individual work and small group brainstorming.

The five workshops took place on four different evenings at different locations in the City to make the meetings as convenient as possible. The workshops had three distinct parts:

1. **Setting the Stage:** Participants were given a brief introduction to the Delaware Together planning process and project timeline.
2. **Small Group Work:** Participants were asked to answer the question "What are the greatest opportunities for the Delaware Community?" and discussed their answers in small groups. Workshop participants also worked together to map "strong places" and "weak places" in the City.
3. **Reporting out:** At the end of the meeting all groups shared their strong and weak places and big ideas.





All individual comments collected were recorded in a database, indexed and categorized. The consultant team then identified common themes from which preliminary goals, objectives and actions were developed. A composite map was created from the top strong and weak places identified in the City to inform the land use planning work.

MAJOR OUTCOMES

1. Over 350 people attended the workshops
2. 470 Focus on the Future mapping comments
3. 1,300 total ideas
4. There was a high satisfaction rate based on exit questionnaires:
    - 100% of people felt comfortable working in their group
    - 100% felt their ideas were recorded accurately
    - 99% wanted to continue to participate in the process

KEY TOPICS

Infrastructure, walkability and connectivity

Identity, character and community

Growth, revitalization and targeted areas

Economics, employment and tourism

Sustainability, environment and parks & recreation

Downtown

Housing

University and education

ONLINE AND SUPPLEMENTAL ENGAGEMENT

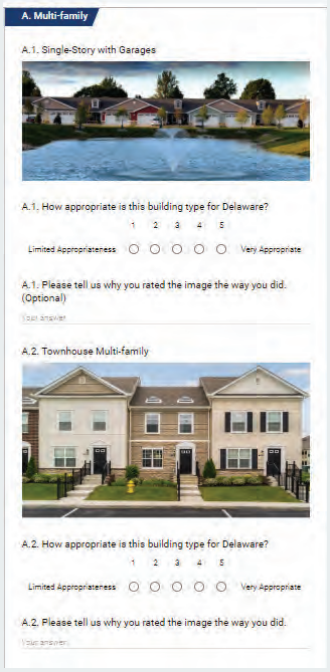
Throughout the planning process, additional opportunities were created to collect input outside of the formal workshop settings. This included both online engagement and face-to-face meetings with key stakeholders.

DEVELOPMENT TYPES PREFERENCE SURVEY

An online survey was conducted through a visual preference exercise for Steering Committee members. Participants were asked to identify desirable development types for infill or redevelopment of existing developed areas as well as undeveloped areas. They were provided with images of different designs for each development type and asked to rate how appropriate the style is or is not for Delaware.

TESTING DEVELOPMENT TYPES

Development types are the subdivision patterns and organization of individual properties including design and configuration of streets and other public spaces. The supplemental online engagement asked the opinion of members of the public on a broad range of development Types. More information on development types please see Chapter 4.



KEY TAKEAWAYS

1. Traditional building materials/styles preferred and the quality of materials is important
2. Need for attainable housing and desire for a variety of housing types
3. Support a range of housing styles
4. Support mixed-use developments that integrate commercial with other uses
5. Institutional buildings should meet a very high standard for design
6. Some intensification of development is appropriate closer to downtown

TARGETED ENGAGEMENT

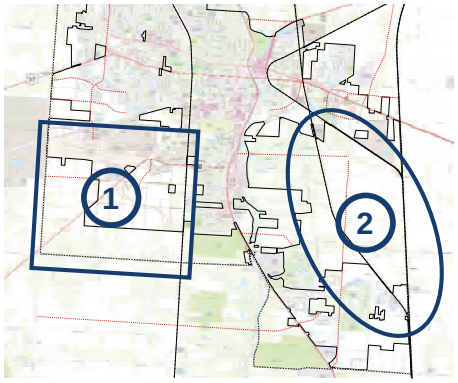
In addition to the supplemental online engagement, throughout the process special efforts were made to engage with key groups and individuals with a stake and an interest in the plan. This included in person and virtual meetings with City Council as well as community groups.



A display at the Delaware Community Center / YMCA allowed people to identify strong and weak places in the community.

FOCUS AREAS ACTIVITY

An online activity was conducted, and broadly promoted to the public, in order to test concepts for the Southeast and Southwest Focus Areas. Participants had the opportunity to share their preferences out of a choice of several different concepts and to provide qualitative feedback.



Preliminary ideas for the Southwest (Area 1 above) and Southeast (Area 2 above) Focus Areas were tested online.

KEY TAKEAWAYS

1 SOUTHWEST AREA

- Continue to attract a range of industries, recognizing shift to R&D and tech-oriented sectors
- Build and maintain infrastructure that supports new industry as well as amenities that create a vibrant, attractive working environment
- Provide the opportunity for housing, including workforce housing

2 SOUTHEAST AREA

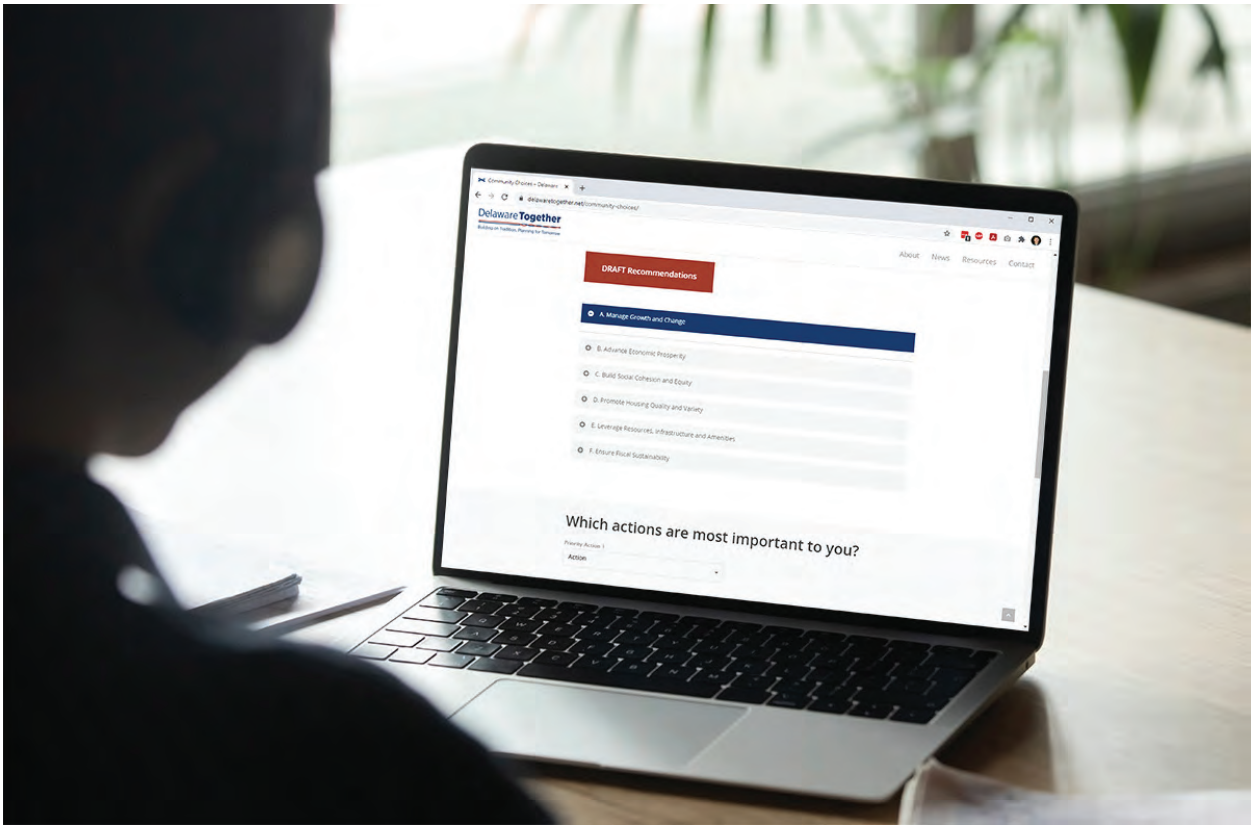
- Support for a neighborhood centers concept, which established multiple mixed-use centers surrounded by residential areas
- New residential development to reflect "traditional" neighborhoods and preserve rural character in other places
- Ensure key north-south thoroughfare connections and to preserve roadway connections to other areas

COMMUNITY CHOICES

Beginning in late-January 2021, the public was invited to view the draft plan and to provide comments on all elements of the plan online via the project website with a focus on the Actions in Chapter 7.

The City of Delaware's Communications Department produced a video and the planning team integrated it into the project website to explain the planning process to date, provide an overview of the plan, and give instructions for how to offer comments on the website. The website activities were broadly promoted through numerous channels, building upon the contacts and networks that were engaged throughout the planning process. All comments were databased and used to inform changes to the final plan.

Based upon input collected the planning team revised recommendations and other plan content to reflect additional ideas, key priorities and the clarity in presentation.



Chapter 3
Conditions and Trends



3. CONDITIONS AND TRENDS

Over the past several decades, the City of Delaware has experienced significant changes with respect to people (population), place (physical environment), and prosperity (economics). This chapter presents information about the existing conditions and trends in the City and the region that have informed the plan's goals, objectives and actions.

ORGANIZATION OF THIS CHAPTER

This chapter is organized into three sections:

1. People

Population and household characteristics and demographic trends

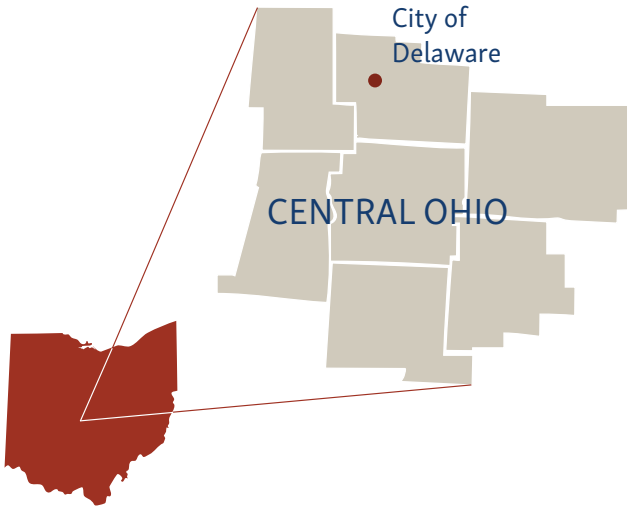
2. Place

Development, land use and character, transportation and parks and open space

3. Prosperity

Economy, employment income, poverty, housing, education and fiscal health

The City of Delaware is located within Delaware County, which is part of the Central Ohio region.



Note: Most recent demographic data comes from the 2019 American Community Survey (ACS) unless otherwise noted.

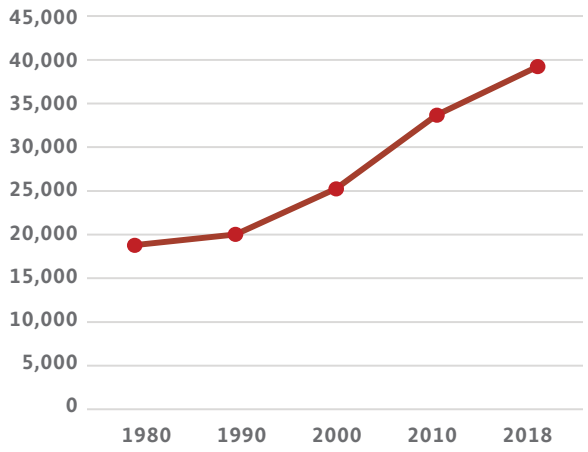
PEOPLE

Population growth and shifts in demographics have contributed to a dynamic environment for planning in the City of Delaware and the region.

CITY AND REGION GROWING

Between 2000 and 2010, the City of Delaware's population expanded by nearly 10,000, or almost 38 percent. While this rate has slowed in recent years, growth trends are still strong and regional growth projections support a strong likelihood that Delaware will continue to retain and attract more residents in the decades to come. Based on the US Census, the number of residents in the City is over 41,200 (over 18% growth since 2010), but based on City building activity, the population is even greater, nearing 44,000. This will place demands on the community with respect to housing, infrastructure, services and amenities. This will require thoughtful and deliberate planning to foster development.

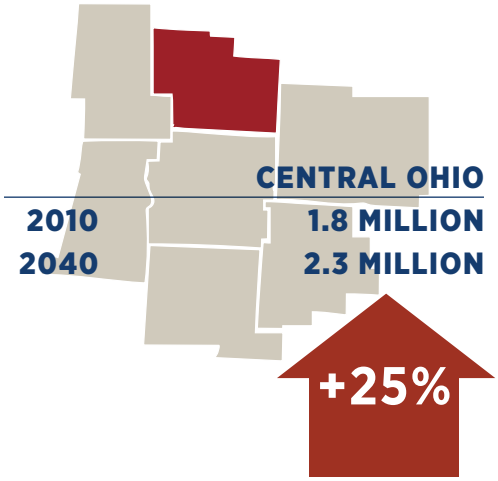
CHANGE IN POPULATION, CITY OF DELAWARE, 1980-2018



Source: U.S. Census, American Community Survey 2018

Regional Growth Projections: insight2050

In 2014, the Mid-Ohio Regional Planning Commission (MORPC), Columbus 2020, and the Urban Land Institute (ULI) Columbus undertook an initiative to project future growth in the region over the next 30+ years and to help communities proactively plan. In 2015, the insight2050 initiative projected in its initial report that the region would grow by 25% (1 million people) by 2050. The report included scenarios for development and an assessment of how each would impact a range of metrics, including fiscal, transportation, environmental, and public health measures. More information can be found at www.getinsight2050.org.

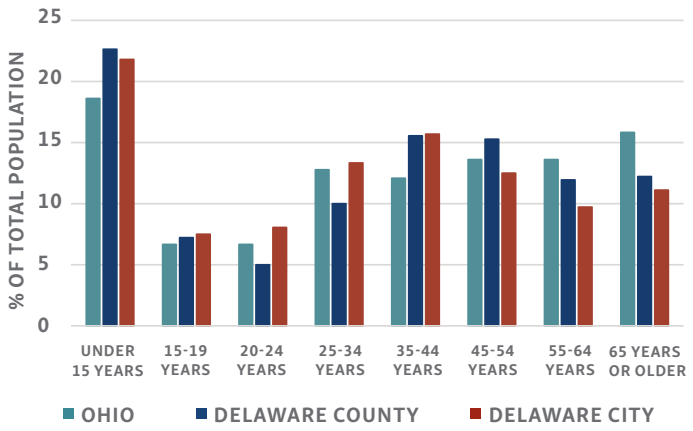


Source: insight2050, U.S. Census, American Community Survey 2012

POPULATION DIVERSE IN AGE

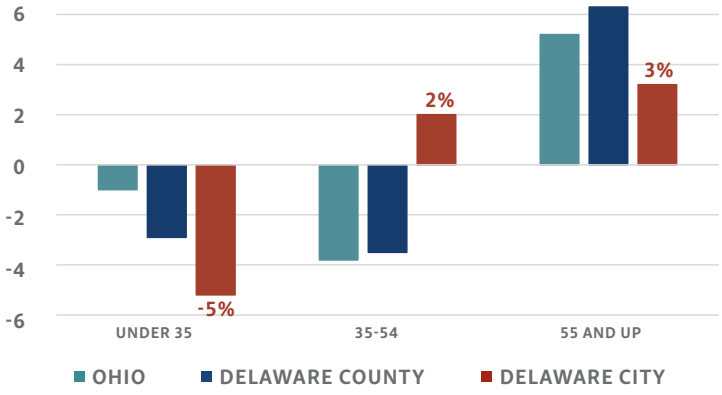
The City's median age is 34.5 years—younger than the County at 38.4 years and the State at 39.3 years. The 35-44 year-old cohort is the second largest, representing nearly 16 percent of the City's population. The proportion of residents in the City over 65 years (which is 11.7 percent) is lower than the County and the State (at 12 percent and 16 percent, respectively), but this population is growing. The City had an increase of just over one percent in the population over 65 between 2009 and 2017, reflecting national, State and County trends. If accommodating people of all ages is to be a priority for Delaware, it will be important for the City to plan for housing, infrastructure, services and amenities that support people at every stage of life.

AGE DISTRIBUTION, 2018



Source: U.S. Census, American Community Survey 2018

% CHANGE IN POPULATION BY AGE GROUP, 2009-2018

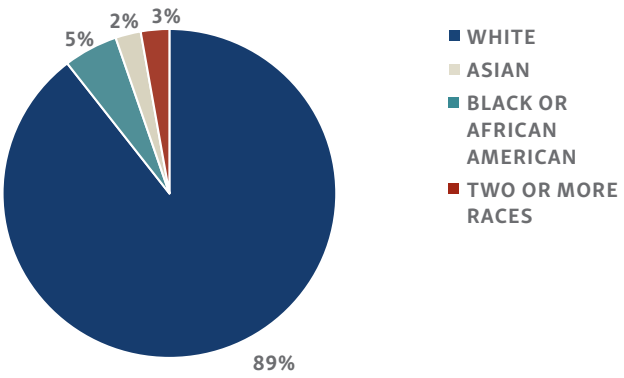


Source: U.S. Census, American Community Survey 2018

DIVERSIFYING

The City is more racially homogeneous than the County or the State, with 89 percent of Delaware identifying as White, compared to over 88 percent of the County and 82 percent of the State. Just over five percent of the population identifies as African American. However, the percentage of the population that identifies as a racial minority has been increasing. For example, the Asian population has doubled since 2018 (from .7 percent to 2 percent). While the racial minority population remains small, its growth will be important to monitor and understand to ensure that Delaware's planning and policies foster a welcoming environment for all.

RACIAL DISTRIBUTION, 2018

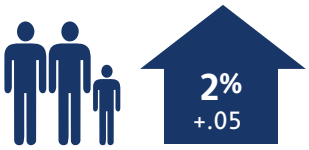


Source: U.S. Census, American Community Survey 2018

HOUSEHOLD SIZE INCREASING

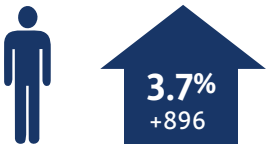
The household size in Delaware is increasing with an average of 2.47 persons in 2010 and 2.52 persons in 2017. However, the percentage of single-person households in the City increased from 20 percent to 31 percent and the percentage of family households with children under 18 decreased from 40 percent to 36 percent in 2010 and 2017, respectively. Delaware still has a large number of family households and its family orientation, strong schools and other factors promise that it will continue to be an attractive community for families. As Delaware builds new housing it will be important to focus on providing a variety housing types to accommodate different household sizes and preferences.

AVERAGE HOUSEHOLD SIZE INCREASING



Ohio: -1%

SINGLE-PERSON HOUSEHOLDS, CHANGE



Ohio: +1%

What is a household?

The following definitions related to households are used by both the US Census Bureau and Department of Housing and Urban Development (HUD).

Household: A person or group of people living together in one housing unit.

Housing unit: A house, apartment, mobile home, group of rooms or single room, which are intended as separate living quarters.

Family household: A group of two or more people living together in a housing unit who are related by birth, marriage, adoption, etc.

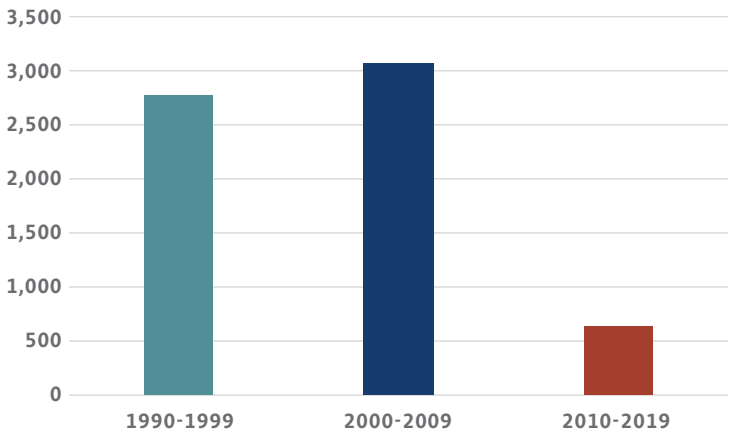
PLACE

New development has changed the physical environment of Delaware since the last comprehensive plan. In spite of these changes, the City retains a strong downtown character, attractive traditional neighborhoods and desirable new residential and commercial areas.

ANNEXATION OF PROPERTY OVER TIME

Since 1990, the City has annexed land adjacent to its boundaries, primarily to the south, southeast, east and west. Most of this annexation occurred in the 1990s and 2000s, with relatively little annexation taking place in the past decade. In 2020, the City has received numerous inquiries about potential annexations in the future with a few being advanced already. This reinforces the fact that the areas annexed in previous decades are starting to build out and the next wave of outward growth by annexation (within the utility boundaries of the City) is likely to occur during the next decade. Annexation has allowed the City to grow, has brought these properties into the City's jurisdiction for real estate and income taxation and has allowed the City to manage growth and development in these areas. The City in turn provides services and utilities to these areas, and they are incorporated into the City's school districts (Olentangy Local Schools and Delaware City School District).

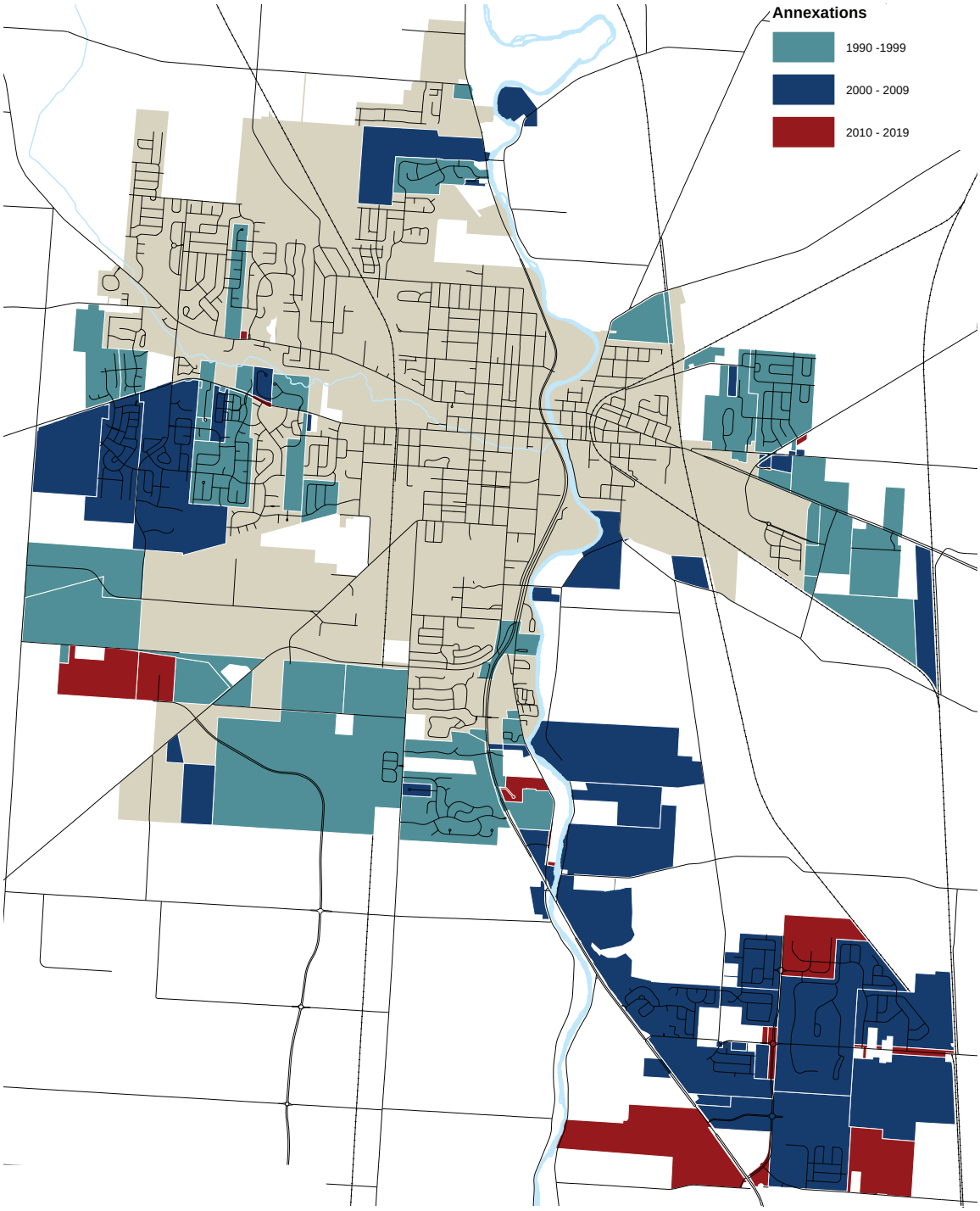
LAND AREA IN ACRES ANNEXED BY CITY, 1990-2019



Source: City of Delaware



ANNEXATION BY CITY OF DELAWARE, 1990-2019



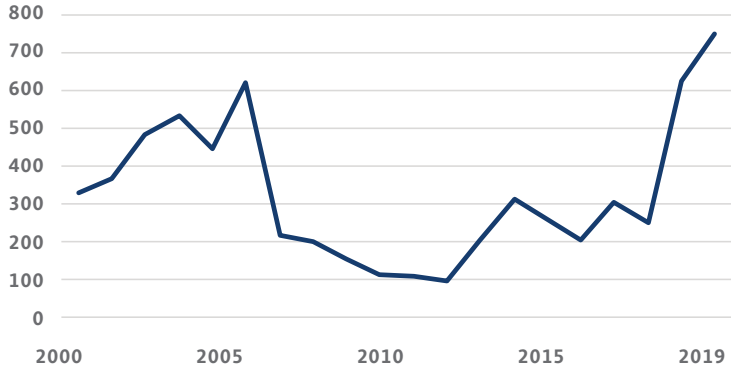
SIGNIFICANT RESIDENTIAL DEVELOPMENT

From 1996-2004, the City saw a significant increase in housing construction, especially single family housing. Following the 2008-2009 recession, the pace of development slowed until recent record permit years, but since 2014 has been on the rise again. The character of residential development has been largely suburban, with wide and deep lots on curvilinear streets connected to arterial roads. Most homes are one to two stories with attached garages. However, some alternative products have also been developed, such as attached "landominiums," single family housing on smaller lots (infill and subdivision development), and multifamily housing.

MANY RENTAL HOUSING UNITS

In comparison to the County and the State, Delaware has a relatively high proportion of rental housing (37 percent, compared with 18.7 percent for the County and 34 percent for the State). This can benefit young people and those who are interested in buying but cannot afford to yet. It can also allow more of the workforce to live in the community. Maintaining the quality of existing rental housing is very important. Within the last decade or so the City has seen a significant number of rental projects developed or approved. Projects have included Seattle House, Preserve at Quail Pass, Burr Oak Commons, Flats on Houk, downtown second and third story apartments, Arthur Place, Riverside Landing at Delaware Place, Coughlin's Crossing, Meadows at Carson Farms, numerous Ohio Wesleyan University housing projects, various social-service agency housing projects, Del-Mor Dwellings projects including Courage **Court, and several senior housing projects.**

NEW RESIDENTIAL PERMITS, CITY OF DELAWARE, 2000-2019



Source: City of Delaware

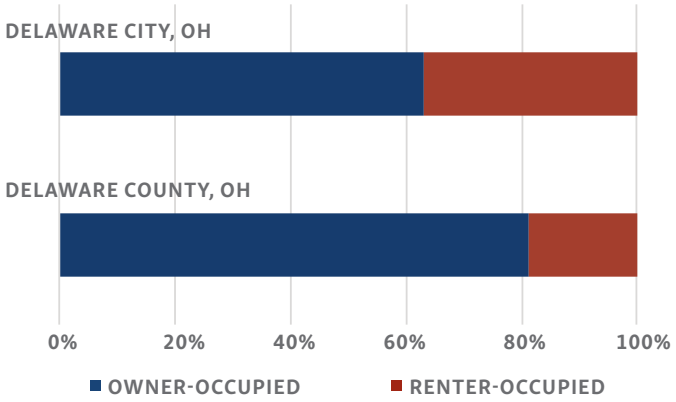
Building Industry Association of Central Ohio Housing Need Assessment

Conducted in 2018 by Vogt Insight Strategies, this report uses findings from insight2050 to estimate the need for new residential housing in the Columbus, Ohio Metropolitan Statistical Area and the 10 surrounding counties.

The report concludes that with significant job growth expectations through 2050, additional housing will be needed to accommodate this growth. The report details Delaware County to also grow its housing stock to position itself for increased growth.

The assessment can be found at www.biahomebuilders.com.

OWNER VS RENTER-OCCUPIED, CITY OF DELAWARE, 2018



Source: U.S. Census, American Community Survey 2018

CHARACTER OF NEIGHBORHOODS MAINTAINED

While allowing for new development, the City has prioritized historic preservation and the retention of the character of the built environment in traditional neighborhoods. This includes Northwest Delaware (National Register District), East Side (1920s era, plus Old Colony Estates), University District (anchored by Ohio Wesleyan), the Marvin/Delaware Meadows area (smaller, mid-century housing), and both the West Side and Southwest Side. Many of these traditional neighborhoods contain a variety of housing styles, lot uses and lot coverages. However, while new development has been allowed, the look and feel of these areas remains largely intact, guided by the existing comprehensive plan and zoning code.







Three housing units within the same block demonstrate the variety of housing existing within the same area. Lot sizes for the properties shown range from 7,000 to over 11,000 sf, with dwelling units per acre ranging from four to over ten.



The City has prioritized historic preservation, retention of existing character, and sensitive infill development in traditional neighborhoods.

CONSERVATION OF UNDEVELOPED AREAS

While the City has encouraged new residential subdivisions in certain locations, it has not been policy or practice to allow for uncontrolled growth. Rather, in order to encourage fiscal and environmental sustainability, and to not overburden existing roads, utilities and City services, efforts have been made to direct development to key locations while leaving other areas in use for agricultural, recreation or conservation purposes. Within City boundaries, 18 percent of land area remains in agricultural use (14 percent) or is dedicated to parks and open space (4 percent). Within the unincorporated areas that are inside the study boundary for this plan, 63 percent of the land area remains in agricultural use (59 percent) or is dedicated to parks and open space (4 percent). (Source: McBride Dale Clarion analysis of City of Delaware GIS data.) More information and a map showing sites that present opportunity for development, and those that are more appropriate for conservation, is presented in Chapter 4, Development Framework.

VIBRANT DOWNTOWN

In Delaware's downtown, the Architectural Standards for the Historic District and incentives such as the Facade Improvement Program, promote restoration and have contributed to a walkable, coherent and attractive environment that draws visitors, creates quality places for residents to enjoy, and supports small businesses. Key partners, such as Main Street Delaware, have also been critical to success in preserving the historic character of downtown while allowing for evolution over time.



Within the unincorporated portion of the planning area in the City there is significant undeveloped property.

GREAT PLACES IN AMERICA RECOGNITION

Each year for the past 12 years, the American Planning Association (APA) has designated specific neighborhoods, streets and public spaces as Great Places in America. In 2019, Downtown Delaware was named by the APA as one of four "Great Neighborhoods" in the country. (Downtown was also named a Great Place in Ohio in 2018.) This honor is testimony to the impact of decades of hard work by the City, property and business owners and community partners, as well as outstanding planning and implementation.



POCKETS OF DISINVESTMENT

In addition to the many areas of the City that have been preserved or improved upon since the last comprehensive plan, participants in the public engagement for this plan identified a number of areas have experienced deterioration of the built environment. This includes some roadway corridors (e.g. Lake Street and Marysville Road), The Point (intersection of U.S. Route 36 and state Route 37), the London/Liberty Road industrial area, and the Delaware Square Shopping Center (along Route 23). In addition, while the near east side remains an active and important community in the City, the physical environment of the neighborhood has suffered over the past several decades from vacancy and deteriorated building conditions. Opportunities for physical improvements in each of these areas are important to consider because they can help enhance quality of place for residents to enjoy, inspire additional investment and improve the overall image of the City.



A stretch of properties along Lake Street exemplifies an area with potential for renovation.



Traffic congestion, an unappealing physical environment and a lack of amenities for pedestrians, have made The Point (intersection of U.S. Route 36 and state Route 37) one of the parts of the City that residents feel most needs improvement. A major rebuilding and gateway enhancement effort is currently underway.

CRITICAL NEW ROADWAYS CONSTRUCTED

Since 2004, nearly 50 intersection and road improvement projects have been completed or are in progress in the City (see map on following page). These projects have largely been completed by development and supported new development and alleviated traffic and congestion problems in key areas. A number of projects have also prioritized multimodal transportation, making changes to design to better accommodate pedestrians, cyclists and public transportation. The Glenn Parkway extension has been completed. The project involves extending the Glenn Parkway 2,400 feet from Sycamore Drive to a new roundabout intersection at Berlin Station Road. The extension will be constructed as a two-lane boulevard with a single lane in either direction, expandable to four lanes as traffic increases in the future. The parkway will have a multi-purpose path constructed along the west side, and an area along the east side for a future path.

A new Thoroughfare and Transportation Improvement Plan for the City is under development. It builds off of the previous plan and proposes future roadway projects for the City.



Nearly 50 intersection and road improvement projects have been completed in the last 16 years in the City, including the US23/ Pennsylvania Intersection improvement.



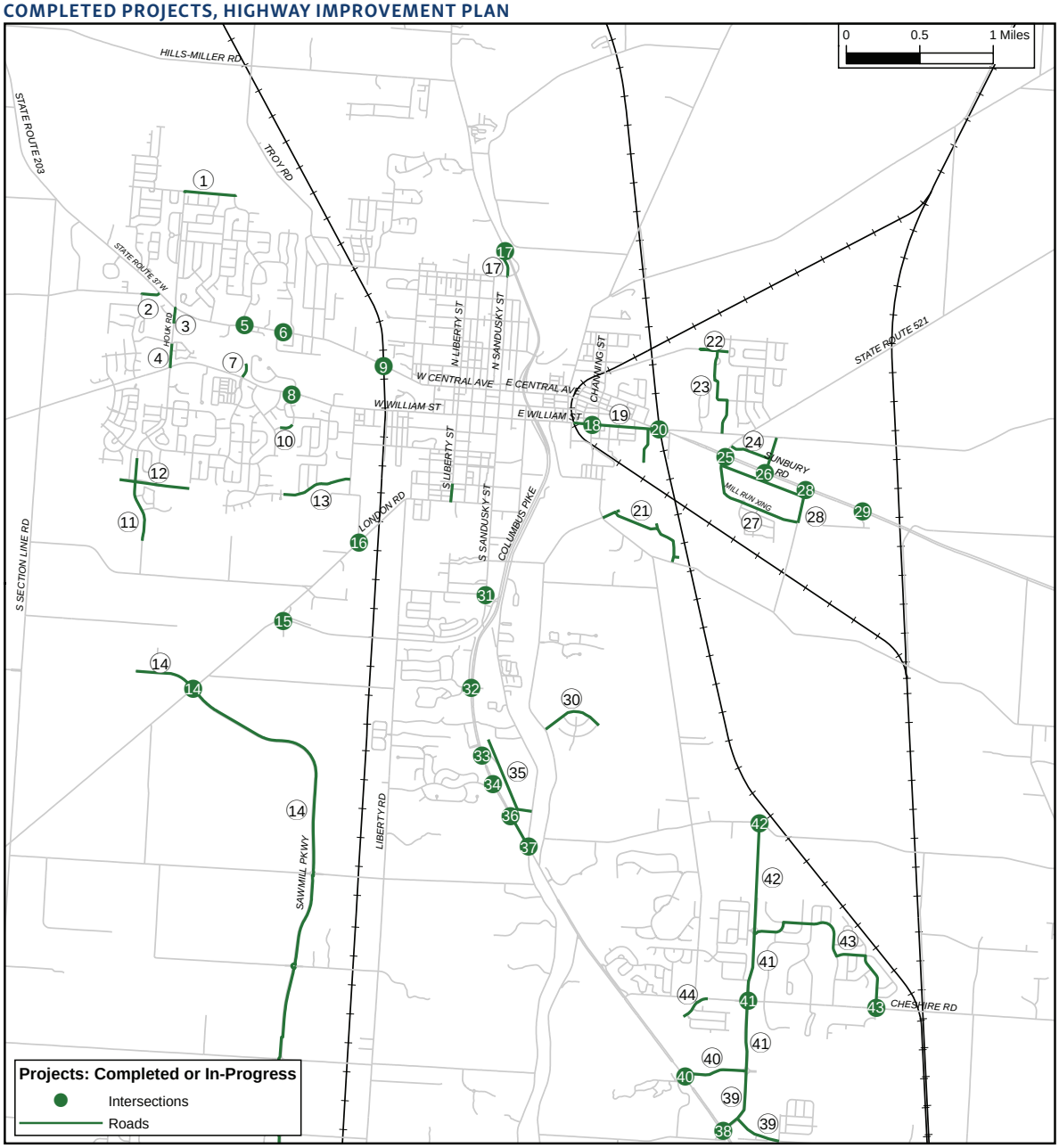
Upon publication of this plan, the Glenn Parkway extension project to Berlin Station Road has been completed.

FOCUS ON MULTIMODALISM

Since the previous comprehensive plan was adopted the City has taken steps to support transportation by mode other than car. This has included new infrastructure for pedestrians and cyclists and the continued critical service provided by Delaware County Transit (formerly DATAbus).

In 2019, the City adopted traffic calming guidelines which can be used to review options in neighborhoods on a case-by-case basis. The City has also adopted traffic calming measures in key locations such as along Hull Drive. A number of policies have also promoted multimodalism and complete streets. A complete streets policy was adopted in 2020. See Appendix.

COMPLETED PROJECTS, HIGHWAY IMPROVEMENT PLAN



No.	Completed Project
1.	Merrick Blvd. (Houk to Cambridge)
2.	Warrensburg Road Realignment at SR37
3.	Houk Road Widening at SR37
4.	Houk Road Widening at US36
5.	Central Ave/Lexington Blvd Signal
6.	Central Ave Turn lane (In Progress)
7.	Valleyside Drive Extension (Phase I)
8.	William/Applegate Signal
9.	Central/CSX Over Height Detection System
10.	East Street Connection to Applegate
11.	South Houk Road Connection
12.	Boulder Drive Extension (Phase I)
13.	Firestone Drive Extension
14.	Sawmill Parkway & US42 Intersection
15.	US42/Jegs Blvd Signal & Intersection
16.	Curtis/London Intersection Improvement
17.	US23/Pennsylvania Interchange
18.	E William/Cheshire Signal (In Progress)
19.	E William Street Improvements
20.	The Point RR Bridge Widening (In Progress)
21.	Residential Collector Route
22.	Vernon Ave Collector

No.	Completed Project
23.	Residential Collector Route
24.	Biltmore Drive Backage Road
25.	US36/SR37/SR521 Intersection Improvement
26.	Glennwood Plaza Signalized Entrance & Backage Rd.
27.	Mill Run Crossing
28.	Glenn Road Realignment
29.	US36/SR37/Davidson Lane Intersection Improvement
30.	Terra Alta Residential Collector (Phase I)
31.	Sandusky/Belle Ave Intersection Improvement
32.	US23/Cottswold Intersection Improvements (In Progress)
33.	US23/Stratford Drive Intersection Improvement (In Progress)
34.	US23/Hawthorn Blvd Intersection Improvement (In Progress)
35.	Commercial backage Road Improvement (In Progress)
36.	Meeker Way Connector (US23 to Stratford)
37.	US23/SR315/Stratford Intersection Improvement
38.	US23/Peachblow Road Intersection Signal (In Progress)
39.	Glenn Road/Peachblow Extension/realignment*
40.	Ohio Health Blvd & US23 Intersection
41.	Glenn Road Extension (Ohio Health to Sycamore)
42.	Glenn Road Extension (Sycamore to Berlin Station) (In Progress)
43.	Residential Collector Route
44.	Cheshire Road Realignment (Phase I)

Project Included in 2001 Thoroughfare Plan

IMPACTFUL SUSTAINABILITY EFFORTS

The City's commitment to sustainability in recent years has been demonstrated through numerous projects. Moving forward many community members hope that even more can be done. Projects have included a rain garden in collaboration with Ohio Wesleyan University near Branch Ricky arena, a small-scale solar array at the City's public works facility, and the conversion of street lights to LED. The City has also introduced permeable pavement in conjunction with upgrades at Blue Limestone Park. In conjunction with a developer, the City has constructed a wetland park on the south side of Mill Run Crossing behind the Glenwood Commons Shopping Center that included over 10,000 plantings. Beyond these physical improvements, Sustainable Delaware and other organizations have played a major role in promoting sustainability in the City. This work has included advocacy, education, special events and support for key projects ranging from bicycle racks to community gardens and electric vehicle charging stations.

MANY PARKS AND RECREATIONAL AMENITIES

The City has 24 parks (including Mingo Park, which has a public swimming pool), 20 miles of trails, an executive golf course, a free splash pad and an urban forest consisting of more than 18,000 trees. In addition, the Delaware Community Center YMCA serves as an important community amenity. Beginning in 2020, the City engaged PROS Consulting to conduct a Recreation Needs Assessment. The work has involved an analysis of the City's needs in regard to recreational services, which has informed this plan's recommendations.



In 2015 the City opened a brand new, state-of-the-art water treatment facility. Community members can learn about the water treatment process at the facility's education center.



Solar panels power a recycling building on the Public Works campus, reducing the electric bill for the building by more than $5,000 a year.



The Jack Florance Pool at Mingo Park is a major summertime amenity for Delaware residents.

PROSPERITY

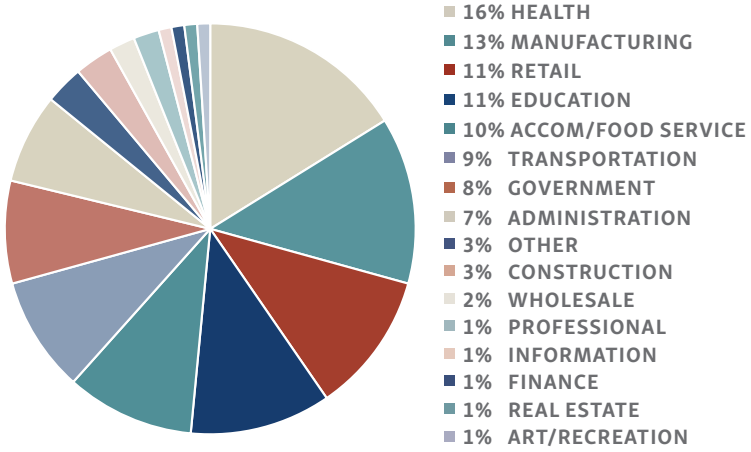
Delaware's economy has changed and diversified in recent years. Income has surged in the City of Delaware since the 2008-2009 recession, especially when compared to the region as a whole. Prior to the 2020 disruptions due to COVID-19, employment in many industries had remained steady and the City's fiscal position is solid.

DIVERSE ECONOMY

Delaware benefits from a relatively diverse economic base. No one sector dominates the local economy. Key Industries include manufacturing, health care, education, retail trade, tourism (accommodation & food service), transportation, and administrative services. Some industry sectors are less-represented, such as professional and technical services, finance, arts & recreation, information services, real estate, and management services.

The City's largest private employers also illustrate the diversity of economic activity present in Delaware. The largest private employer is Ohio Health, with about 1,500 people employed in hospital and ancillary functions. The Kroger Distribution Center employs 1,100 people while Ohio Wesleyan University has a total faculty and staff complement of about 600. Other large employers include such manufacturing concerns as PPG Industries and Vertiv (which conducts research & development activity in Delaware). Jegs Automotive has about 250 employees at its headquarters and administrative offices in the City.

INDUSTRY SECTORS



Source: U.S. Census, 2015

TEN LARGEST EMPLOYERS

EMPLOYER	EMPLOYEES	INDUSTRY
OhioHealth	1,500	Healthcare
Kroger Distribution Center	1,100	Logistics
Ohio Wesleyan	600	Education
Advance Auto	400	Logistics
Vertiv	350	Research & Development
PPG Industries	330	Manufacturing
Domtar / AHP	300	Manufacturing
JEGS Automotive	250	Headquarters / Admin
Liberty Castings	230	Foundry
International Paper	175	Manufacturing

Source: City of Delaware, 2019

MOST TRAVEL FOR WORK

Based on Census employment and commutation data, approximately 80% of working Delaware residents commute out of the City for their employment. Meanwhile nearly 80% of Delaware's at-place workers commute in to the City from other places. Only about 20% of the jobs in Delaware are held by Delaware residents.

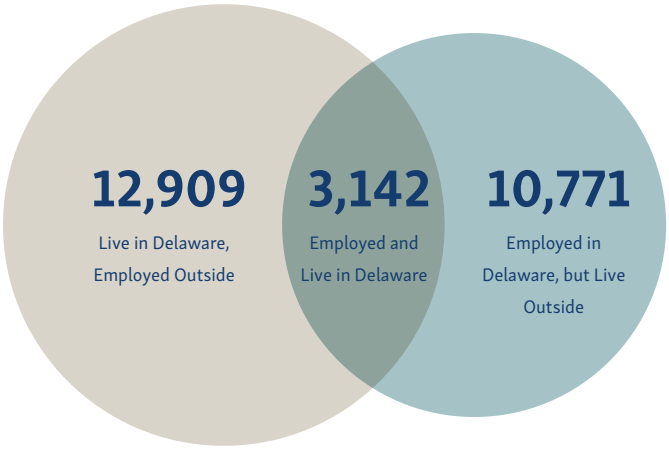
LABOR MARKET IMBALANCE

There are more than ten times as many management service professional workers residing in Delaware than there are management service jobs in the City. At the same time, Delaware remains relatively "heavy" in manufacturing employment as compared with the Columbus MSA as a whole. Nearly 14% of the City's employment base is in manufacturing, compared with just about one-half of that share at the regional level. Ultimately, if the City were to reduce the imbalance in resident versus at-place jobs, there would be a focus on attracting or growing more local jobs in management, professional & technical services, finance, arts & recreation, and a handful of other sectors.

INCREASING HOUSEHOLD INCOME

The global financial crisis and subsequent recession had a significant impact on household incomes in the City, County and State. However, by 2016, household incomes had rebounded to nearly $71,000, a very healthy increase of 2.2 percent per year. Incomes throughout the County and region increased as well, but not as fast as in the City of Delaware.

EMPLOYMENT INFLOW-OUTFLOW



Source: US Census, 2015



There is opportunity for new high tech businesses in emerging business park areas located in proximity to existing industrial areas.

STRONG, BUT CHANGING, INDUSTRIAL MARKET

Columbus is a large distribution hub for the Midwest and beyond. For Columbus and Delaware economic development efforts related to distribution facilities are focusing more on existing facilities and their retention rather than growth from new facilities as land and labor force issues are pressing these uses much further out from the core metropolitan area. For example, the Kroger Great Lakes Distribution Center in the City recently added a 130,000 square foot addition. Located with access to the state highway system, Delaware has a significant industrial and R&D presence. This includes major facilities for EMS, PPG, Liberty Castings, Midwest AF, and others. Within Delaware, it is estimated that there are about 1.8 million square feet of industrial space, based on available inventory data coupled with employment factors. There is limited vacancy, estimated at 3.3% (mainly in Innovation Park), which is consistent with sub-market and market-wide data. Research and development and higher tech industry space have been identified as opportunity areas for the City and there is a desire to attract more of this type of industry. The market is shifting in this southwest area of the community to include more Business Park opportunities for innovative businesses and boutique manufacturers. Additionally, the labor force in Delaware and the Columbus metro area is shifting from traditional heavy manufacturing (a labor force that is increasingly difficult for employers to find in the Columbus area) to a more highly skilled work force. Innovation Park is a good recent example of this shift in use and labor force.



JEGS Performance is located in the Delaware Crossing Business Center, which has 848 acres potentially available for development on the south side of U.S. Route 42.

Delaware's Industrial / Business Park Market Strengths

- The proximity to a local airport, to Marysville (as an automotive production hub), and to Columbus.
- The geographically large and well educated labor market area, provides a potentially growing labor supply.
- Thousands of acres of available business park land to accommodate development in the area.

FAMILIES LOOKING TO STAY

Delaware tends to attract its market from a diverse set of demographic and geographic cohorts. Among these first-time buyers are many people born and raised in Delaware. Many of Delaware's high school graduates tend to stay in the area and rent for a time and then look to buy once they have families. Those young families are often looking for housing priced in the $180,000 to $220,000 range, but are often priced out of new build market at current price points. The pre-existing housing stock and median housing value of owner occupied housing units according to the Census (2014-2018) of $175,400 are actually below the desired range expressed. This indicates that there is a large segment of the existing housing market that can satisfy this expressed desired price range that is attainable.

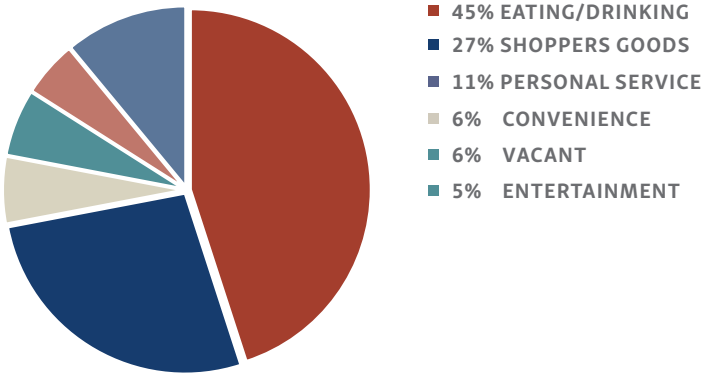
DOWNTOWN ON THE RISE

Downtown Delaware has developed, improved and thrived since the completion of the last Comprehensive Plan in 2003. Chapter 7 of this plan includes a number of recommendations specific to Downtown which recognize its vital importance to the City. The City's Downtown is 94% occupied, a healthy number relative to similar, older downtowns. The fact that only about 6 percent of Downtown retail space is vacant is a sign of great success considering that vacancy was once not long ago in the range of 40-50 percent. In total, there is approximately 310,000 total square feet of ground floor commercial space in Downtown. Of this, about 60 percent (190,000 square feet) is retail, restaurant, and entertainment use, including a vibrant mix of longtime and newer tenants. The success of Downtown is reflected in rising rents, which are averaging $14-$17 per square foot, up from $8 per square foot in 2010.

RELIANCE ON EATING AND DRINKING

Downtown retail use is heavily oriented to eating and drinking establishments, which constitute roughly 45 percent of the total inventory of retail use. Restaurants, bars, and entertainment venues are often part of the first wave of businesses that help to re-establish downtowns as destinations, particularly in the absence of the large department stores that once dominated downtown retail business. Delaware has succeeded in building its downtown restaurant scene but the remaining retail categories have not yet caught up.

DOWNTOWN DELAWARE RETAIL USE



Source: City of Delaware



Downtown tenants include a number of local, independent, and start-up businesses as well as national businesses; and the City is becoming an affordable destination for specialty businesses.

Shopper's goods stores, businesses offering product for which consumers comparison shop, constitute just 27 percent of the retail mix. Ideally for a more competitive retail environment, shopper's goods should be closer to 45 percent.

HOUSING STOCK AND AFFORDABILITY ATTRACTS REGION

Brokers and others emphasize that Delaware attracts those from Columbus and Franklin County for several reasons including more affordability, lower income taxes, good schools and "small town living." The housing offered in Delaware has been successfully priced to attract homebuyers from locations closer to Columbus and other parts of the metropolitan area. Overlapping with this group is the age cohort of Millennials, with singles looking for housing with “less grass” but families with children more apt to purchase traditional suburban-style housing. Families with children are often moving based on the reputations of school districts.

Another important age cohort includes empty nesters of the Baby Boom generation, some of whom are moving “down” within the Delaware market while others are moving to Delaware from other parts of the Columbus region. Many are moving to Delaware for lower income taxes and one-floor living arrangements. Some are moving in from more rural areas in order to downsize and be closer to medical and other services. In 2019, households in this cohort appear to be seeking housing in the $200,000 to $225,000 price range, on average.







Delaware's attractive existing housing stock and the rapid pace of new construction in recent years continues to attract new residents, supporting the City's population increase.

OTHER ASSETS FUEL HOUSING INTEREST

In addition to the attractiveness of current housing stock in Delaware, a range of other factors drive interest in housing in the City. Delaware's location in the growing Columbus Metropolitan Area is a critical factor impacting overall competitiveness for housing. Unlike most other metro areas in Ohio, Columbus has a diversified economic base and appeals to young graduates, with a growing labor market. Second, several colleges are located in Delaware that graduate young people into the labor market and create opportunities for housing. Ohio Wesleyan University and its 1,600 students, Methodist Theological School of Ohio and Columbus State's Delaware campus, just outside of the City limits, are all assets. Delaware is also home to County Government, which helps stabilize the local economy and generate demand for housing government workers. Third, Delaware has an historic downtown that is attractive for those seeking a small-town lifestyle and walkable amenities. This provides a "sense of place" that is very attractive. Fourth, large employers including Ohio Health, Kroger, Advance Auto, Jegs Automotive, Vertiv, PPG, International Paper and others help generate demand for housing in Delaware. This is bolstered by small businesses, including entrepreneurs and downtown retailers.

Finally, the City is fortunate to have two outstanding public school districts: The Delaware City School District and the Olentangy Local School District. Both are high quality school systems that focus on individual learning and excellence but operate at two very different scales with Delaware being the historic city school district serving about 6,000 students and Olentangy encompassing a huge geographic area covering several jurisdictions and serving over 22,000 students. Families looking to move into the community, therefore, have great choices with local school districts which are consistently highly rated. Additionally, there are several private schools in the City that are also highly regarded, such as St. Mary's and Delaware Christian School.

MORPC Regional Housing Strategy

The Mid-Ohio Regional Planning Commission (MORPC) conducted a Regional Housing Strategy that concluded in late summer 2020. The strategy's goal was to create a coordinated housing plan for the region that develops investment and policy recommendations to support mixed income neighborhoods and regional growth. The strategy reviews existing studies, recommends investment priorities, identifies gaps in funding streams, identifies structural impediments and sets forth metrics for individual communities and the region. The strategy was led by MORPC with a consultant team of national and local firms. This strategy will provide valuable data and insights that will help to provide regional context for understanding Delaware's housing needs in the future.

"As Central Ohio grows, now is the opportunity to get ahead of major challenges related to housing affordability that other regions our size are facing today. That said, we must act quickly as studies over the last few years, the most recent coming from the BIA, show we are not keeping up with the need for housing."

MORPC Executive Director William Murdock

ATTAINABLE NEW-BUILD HOUSING A CHALLENGE

Brokers suggest that new housing prices are not aligned with demand generated by first-time buyers, empty nesters and local workers from within Delaware. Lenders estimate that 30% to 40% of prospective Delaware loan applicants cannot afford the note or don't have cash for down payment. Community input from the planning process affirmed a lack of new-build housing that is attainable for many local residents and workers, even as Delaware's housing prices are found to be lower than those in Columbus and southern Delaware County. This is likely more reflective of a regional population boom that has driven market prices past traditional points as developers have not kept pace with demand in recent years. It is a regional issue being addressed by MORPC's Regional Housing Strategy.

The difference between what new-build housing costs and what people can pay is due to a complex combination of factors, including an increase in land prices increasing in addition to a growing economy, a maturing real estate market, lack of adequate supply and low unemployment (at just 3.7% nationally before COVID-19). Compounding the issue of affordability is that Ohio Housing Finance Agency (OHFA) tax credit income thresholds have increased, with a fairly high range of $75,400 (in non-target areas) to $91,680 in target areas. This means that people with lower incomes would not qualify. All of this contributes to an emerging "affordability gap" in Delaware within the new-build sector.

ATTAINABLE HOUSING

According to the Urban Land Institute, attainable housing is defined as nonsubsidized, for-sale housing that is affordable to households with incomes between 80 and 120 percent of the area median income. Creating and supporting attainable housing helps to provide more housing options. This could include smaller homes, value housing, missing-middle attached housing, and high-density detached cluster housing. Attainable housing is a complement to conventionally named affordable and/or subsidized housing, which is generally targeted to those with lower incomes.



Smaller scale homes on smaller lots have helped to partially meet demand by young people, empty nesters and others. Demand for such houses is anticipated to continue.

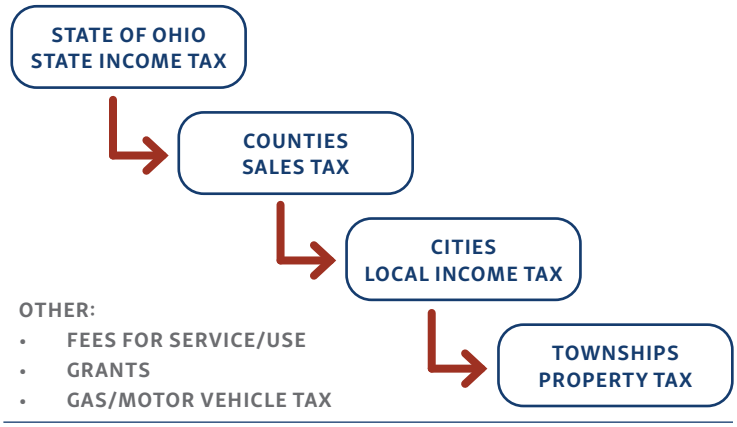


Multifamily, rental housing that functions like single family attached housing developed at Carson Farms (above) has provided a housing alternative for those seeking lower maintenance option.

ALL GROWTH DOESN'T PAY FOR ITSELF IN OHIO

Different types of growth produce different fiscal impacts in the State of Ohio. Generally, residential development impacts vary. Costs of schools and services can generate fiscal drain on budgets, but some types of residential development can help offset costs (e.g. through estate taxes). Office and industrial uses often generate positive net gain, where as retail development often generates a net fiscal loss. However, local fiscal structure matters and every local government has different fiscal dynamics. There are wide variation in levels of service in Ohio communities and local governments have tools they can use to generate revenue (e.g. income tax).

PRIMARY SOURCES OF GOVERNMENT FUNDING IN OHIO

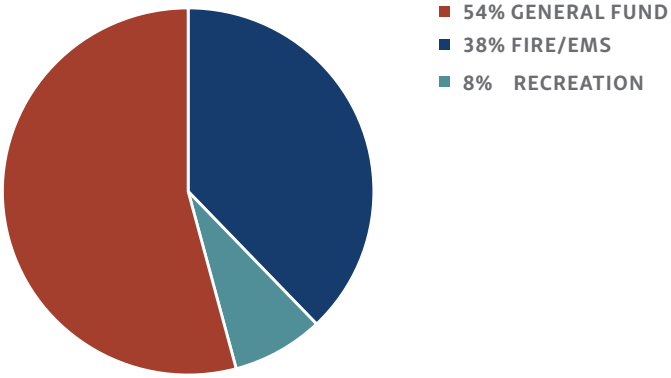


Source: City of Delaware

DELAWARE'S FISCAL POSITION IS SOLID, BUT GROWTH MAY REQUIRE ADDITIONAL REVENUE

Delaware's largest funding source is income tax. The City levies a 1.85% income tax on gross wages and salaries as well as on the net profits of Delaware businesses. In 2019, income tax collections totaled almost $29 million. Of this amount, approximately $10.9 million (38%) is dedicated to pay for fire/EMS, $2.3 million (8%) is dedicated to recreation, and $15.6 million (54%) is dedicated to the general fund, much of which pays for police services.

INCOME TAX EXPENDITURES

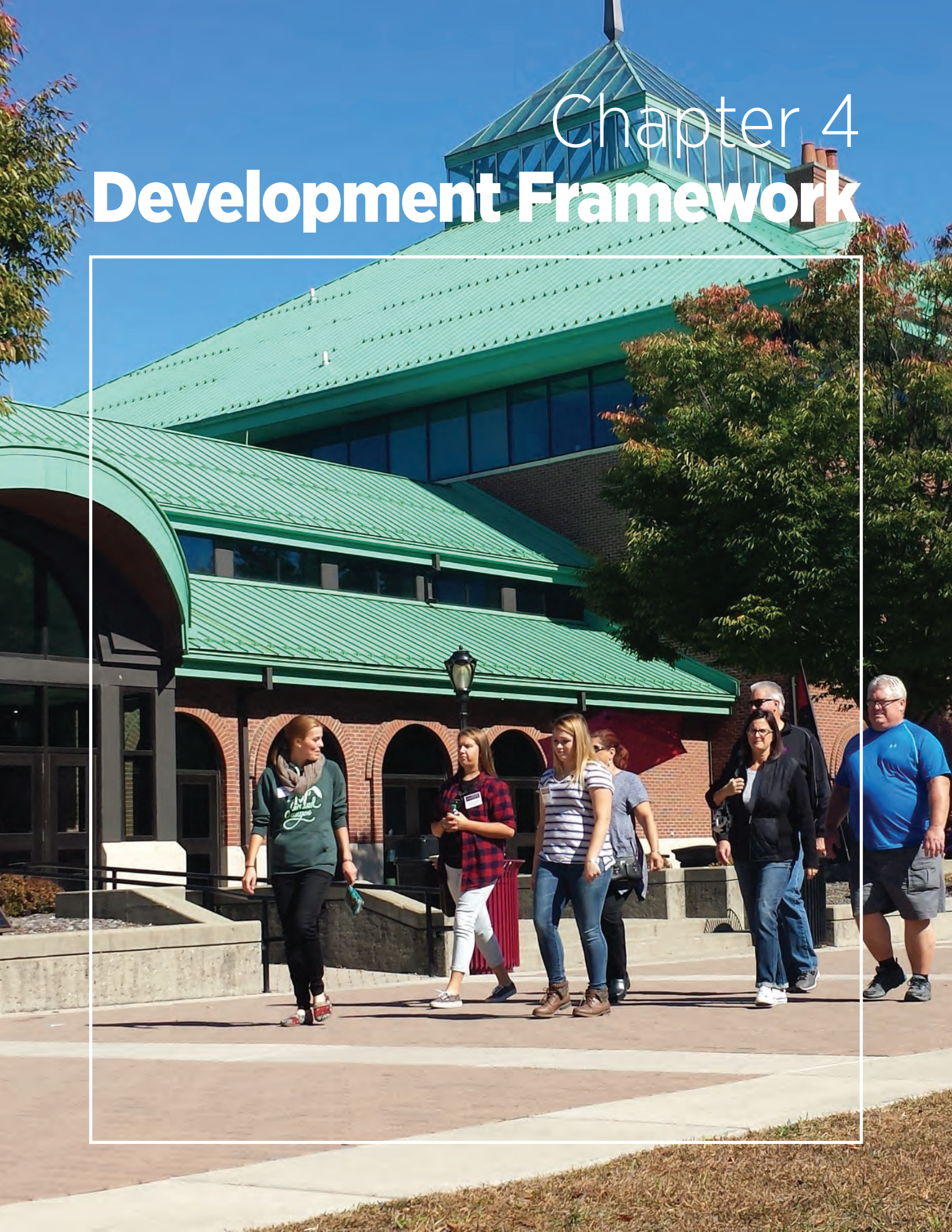


Source: City of Delaware

The City also gains revenue from engineering fees, water capacity fees, sewer capacity fees, building permits, and growth management fees (park impact, police/fire, transportation municipal). While these fees currently keep the City budget balanced, they need to be continually assessed as expenses change over time (typically they go up) due to growth and other factors. (See Chapter 6, Fiscal Sustainability for more.) Additionally, many of the fees are for services related to permit activities and are therefore attributable directly to offset the cost of these activities.

Chapter 4

Development Framework



4. DEVELOPMENT FRAMEWORK

This chapter puts forth a development framework that underpins the plan's Character and Land Use Plan (Chapter 5) and Goals, Objectives and Actions (Chapter 7).

APPROACH

In the following pages information about the existing physical environment within the planning area is presented, including the following:

1. **Development Context.** The Development Context describes overall guidelines that should inform new development in applicable areas of the City. These are presented with text descriptions and illustrative photos.
2. **Infill and Redevelopment Opportunities.** There are opportunities for infill (development of vacant parcels within an existing built environment), redevelopment (conversion of existing property into another use) and new development within the existing City limits. These are presented in a map.
3. **New Development Opportunities.** There is potential for new development opportunities outside of the City limits but within the planning area for this plan. These are presented in a map.
4. **Community Network.** Existing parks, open space, government, institutional and other public or publicly accessible property are key amenities for the public. This is presented in a map.
5. **Transportation Network.** This map shows the existing road network as well as proposed arterials and intersection improvements.

PLANNING AREA BOUNDARY

The planning area used in this plan includes all property within the City of Delaware's jurisdictional boundary as well as property that falls outside of the City as well as property that a) is serviceable by water and sewer infrastructure, and b) has been identified as potentially developable within the ten-year time horizon of this plan based on market trends and anticipated population growth. (Note: just because property has been identified as potentially developable, does not mean that this plan *recommends* development.)

DEVELOPMENT CONTEXT

The Development Context describes the overall purpose and general guidelines that should inform any change within each Character Area and Focus Area described in Chapter 5. A major focus in the future for the City of Delaware will be preserving and protecting what makes Delaware special, including undeveloped areas, existing parks and open spaces, historic neighborhoods and other unique places that contribute to the City's quality of place. At the same time, new development must be directed to help build connections, enhance vibrant neighborhoods and improve neighborhoods, commercial corridors and other areas experiencing disinvestment. New development is also encouraged in the focus areas.

The five contexts identified are:

- Preservation
- Adaptive Re-use
- Infill
- Redevelopment
- Suburban Edge Development

Any new development should be evaluated based on its context. This will ensure that new development is compatible and consistent with the established character of Delaware while providing new opportunities for future residents and businesses and being responsive to shifting demands in the marketplace.



The building at 20-26 E. Winter Street was originally built to house multiple businesses, eventually including the New York Cash Store. The Strand Theatre was added to it in 1916 and became the oldest continually-running movie theater in Ohio. A portion of the building has been adapted for re-use and provides gallery space and office space for non-profit organizations.

PRESERVATION

Preservation is accomplished through special protection of existing significant landscapes, buildings, or natural features. Examples include protection of flood zones, special wildlife habitat, wetlands, river corridors, woodlands, agricultural landscapes, historic structures, landmarks, and the unique architectural character of the traditional neighborhoods in the core of the city.

- Benefits: The special man-made and natural environmental features that contribute to Delaware's sense of place, character, and quality of life are protected for current and future generations. Long-term protection of these features contributes strongly to the quality of life, culture of place, and sustainability of the City.
- Challenges: Property in private ownership may have greater economic value to the individual owner if it is developed for other uses. Costs for preservation and rehabilitation of historic features can also be significant.

GUIDELINES

- Evaluate the cultural, environmental, and social value of maintaining the property in its current form.
- Assess applicable protective measures.
- Perform a cost-benefit analysis for preservation.
- Work with partner organizations to purchase, protect and/or and restore the property(s).
- Adopt local standards to protect key features from destruction, removal, or loss, when appropriate.
- Use crowd funding or other non-traditional programs to raise resources for preservation or rehabilitation.
- Encourage the use of historic tax credits for projects in National Register districts.
- Consider the fiscal impacts of the development along with other factors.





In 2008, a plaque was installed on Sandusky Street dedicated to African-American abolitionist Frederick Douglass and General William T. Sherman. Frederick Douglass spoke in Templar Hall (17-19 N. Sandusky Street) in 1856, and General Sherman spoke in the building after the Civil War. Above: The former Templar Hall with the plaque today after renovation with funding from the City's Facade Improvement Program. Below: Plaque dedication ceremony.

ADAPTIVE RE-USE

Adaptive re-use is the re-use of existing occupied or vacant structures for purposes other than those for which they were originally built. Examples include conversion of large homes for use as office or retail space, retrofitting big box retail stores for a variety of smaller uses and/ or tenants, and renovation of former institutional buildings for residential use.

- Benefits: The existing built form and architectural character of a building or series of buildings is maintained, retaining its contributions to the uniqueness of the built environment. Resources are conserved, contributing to sustainability objectives.
- Challenges: The new use may have different site demands than the original use, increased or decreased parking demand for example. The new use also may not be as compatible with the surrounding uses, such as residential next to certain types of manufacturing. Market conditions and overall project costs may favor demolition and redevelopment.



Through adaptive re-use the historic Delaware Gazette building on E. William Street has been transformed into the home of COhatch, which provides flexible workspace for small businesses, startups, and entrepreneurs.

GUIDELINES

- The overall exterior appearance, footprint or scale of existing structures should not be substantially altered unless a specific project design is demonstrated to be desirable.
- Where changes or additions are made to a structure, they should be clearly distinguished but compatible in materials and style from the original.
- If increased parking is required for the proposed use, it must be accommodated on the existing lot or through a shared parking agreement with other uses in the area. On-street parking or public parking lots and garages may accommodate a portion of the increase, provided a demonstration of adequate capacity for the new development.
- If decreased parking is required, potentially reclaim parking areas for new use to maximize existing infrastructure.
- If there is more than a 20 percent increase in floor area the project should be evaluated as a redevelopment.
- Negative impacts on adjacent properties due to use change should be avoided, minimized and/or mitigated.
- All parking, waste containers or mechanical equipment associated with retrofitting for the adaptive re-use should be screened or camouflaged to reduce impacts from noise, odor or light to adjacent properties.
- A vehicular trip generation study and local road capacity assessment should be submitted for consideration.
- A bicycle and pedestrian trip estimate should be submitted to help evaluate the need for supporting facilities in the vicinity.
- Consider the fiscal impacts of the development along with other factors.

INFILL

Infill is development within an existing developed area on vacant lots that is generally consistent in form and scale with its surroundings. It can also include construction on a mostly built-out lot that intensifies the use. Examples of infill are where a new home is built between two older homes or a new building is constructed on an empty lot in a commercial district between two existing structures. Infill will usually occur in areas with an established housing or business base that is experiencing an increased demand and has a supply of available lots or underutilized lots. Infill requires sensitive design guidance to ensure compatibility in character with surrounding buildings.

- Benefits: Infill projects increase development intensity in areas with existing infrastructure and public services and provide additional housing options, commercial space or retail/services. They can help to re-knit existing built fabric of an area, such as when built on a vacant lot between two existing uses.
- Challenges: Infill projects are surrounded by established development. Larger-scale buildings and an increased level of activity can be viewed as encroaching on established lifestyles and character.



Infill housing located between an older residential area and a shopping center (Redwood / Glenwood Commons) has a contemporary style but is compatible with the scale and character of existing development.

GUIDELINES

- New buildings should be built at a similar scale and with similar lot configuration (setbacks and location of parking and outbuildings), as well as with architectural proportions in context with the block and street.
- If infill takes place on lots at the edge of an area with more intense development, buildings may be constructed in between the scale of the two areas to provide a transition.
- The style of new structures should take cues from the existing context, but should be distinguishable and reflect the era in which it was built rather than mimicking older styles.
- All features of the rights-of-way, including sidewalks, curbs and gutters, curb cuts, and access should be consistent with the existing context if it is of a desirable quality. In contexts where the surrounding environment lacks desired features or amenities, new development should (and may be required by City regulations to) include a higher standard in such features.
- Consider the fiscal impacts of the development along with other factors.

REDEVELOPMENT

Redevelopment is development where the existing pattern is modified on lots that already contain some buildings through lot consolidations or subdivisions, multiple new buildings, or a single, significant change in buildings or use on a site. This could occur where most of a city block is purchased and subdivided and new internal streets are designed. It can also be where a larger property (like a school, golf course or hotel) is developed for housing or a senior living facility.

- Benefits: Redevelopment projects offer the greatest potential to meet demand for intensification of uses and activities. These projects are usually limited to targeted areas where the original buildings have been degraded or underutilized or as identified in specific area or corridor plan.
- Challenges: Redevelopment can dramatically change an area unless properly managed for context-appropriate design and density. The transition to surrounding uses is vitally important to ensure sensitive integration of uses and buffering may be required.



Ohio Wesleyan University's Dittrick House is a redevelopment project that provides duplex-style small living units (SLUs) for students.



A commercial redevelopment improved the side and back frontages of a building with landscaping to create a more welcoming approach from all directions.

GUIDELINES

- The established street and block network should guide building scale and the orientation of new construction. Reverse frontage (where a building is oriented toward a different street than others on the block) should be avoided.
- The use of alleyways or smaller secondary streets and private drives is encouraged to provide intensification of development within a site.
- A similar scale, lot configuration (setbacks and location of parking / outbuildings), and architectural proportions should be used. In select locations, such as street corners, new buildings may be of a larger scale than adjacent existing buildings, but should avoid overwhelming established development.
- A vehicular trip generation study and local road capacity assessment should be submitted for consideration.
- A bicycle and pedestrian trip estimate should be submitted to help evaluate the need for supporting facilities in the vicinity.
- Consider the fiscal impacts of the development along with other factors.

SUBURBAN EDGE DEVELOPMENT

Suburban Edge Development is when a large piece of land (usually more than 50 acres in size) that was previously used for agriculture or forestry, and is surrounded by at least two sides of other large parcels, is developed. The property could be subdivided, condominiumized or part of a Planned Unit Development (PUD). A new street network, infrastructure, and buildings are built. This type of development has been common in Delaware in recent decades and typically involves annexation from one of the surrounding Townships in accordance with the City's plans and utilities.

- Benefits: Suburban Edge Development does not require demolition or adaptive re-use of existing structures except in cases where land needs to be cleared, for example, where there is an old farm or barn. It can accommodate large format uses or larger residential developments at a time of high demand for more housing or other uses. The initial cost of land can be less expensive than in redevelopment or infill projects because there is no existing infrastructure or no significant structures present.
- Challenges: Establishing connectivity to existing public road networks through adjacent development can be difficult. It can have adverse, long-term fiscal implications for local government from a maintenance perspective. The cost of infrastructure, improvements in rights-of-way and new services can outweigh the marginal cost difference in the land. Achieving the most appropriate balance between the existing character of Delaware while meeting demand for housing and other types of development will require thoughtful development standards or PUD. While PUDs can create valuable oversight and flexibility they can increase the need for City staff resources. They can also make approval processes lengthy, uncertain and costly for land owners.

GUIDELINES

- Multimodal transportation connectivity to adjacent areas should be emphasized.
- Protected and accessible open spaces and connections to nearby open space networks should be provided.
- Private sector applicants should build new roads following the City's Major Thoroughfare Plan to accommodate multimodal travel and include sidewalks, bike lanes, and on-street parking consistent with the City's Bike and Pedestrian Plan.
- New development should be coordinated and timed relative to infrastructure availability. Infrastructure, particularly sewer and water service, should be available concurrently with new development or developers must pay to extend it within a project.
- When development occurs adjacent to existing development an appropriate transition is needed and adjacent lots should be consistent in use and size. Smaller lots or more intense uses may be located in the interior of the development.
- While accommodating development, preservation of (or mitigation of) impacts to significant environmental features, wetlands, streams, large stands of trees, and the like (where appropriate) is expected.



Suburban Edge Development on the west side of Delaware incorporates open space and recreational amenities.

INFILL AND REDEVELOPMENT OPPORTUNITIES WITHIN CITY LIMITS

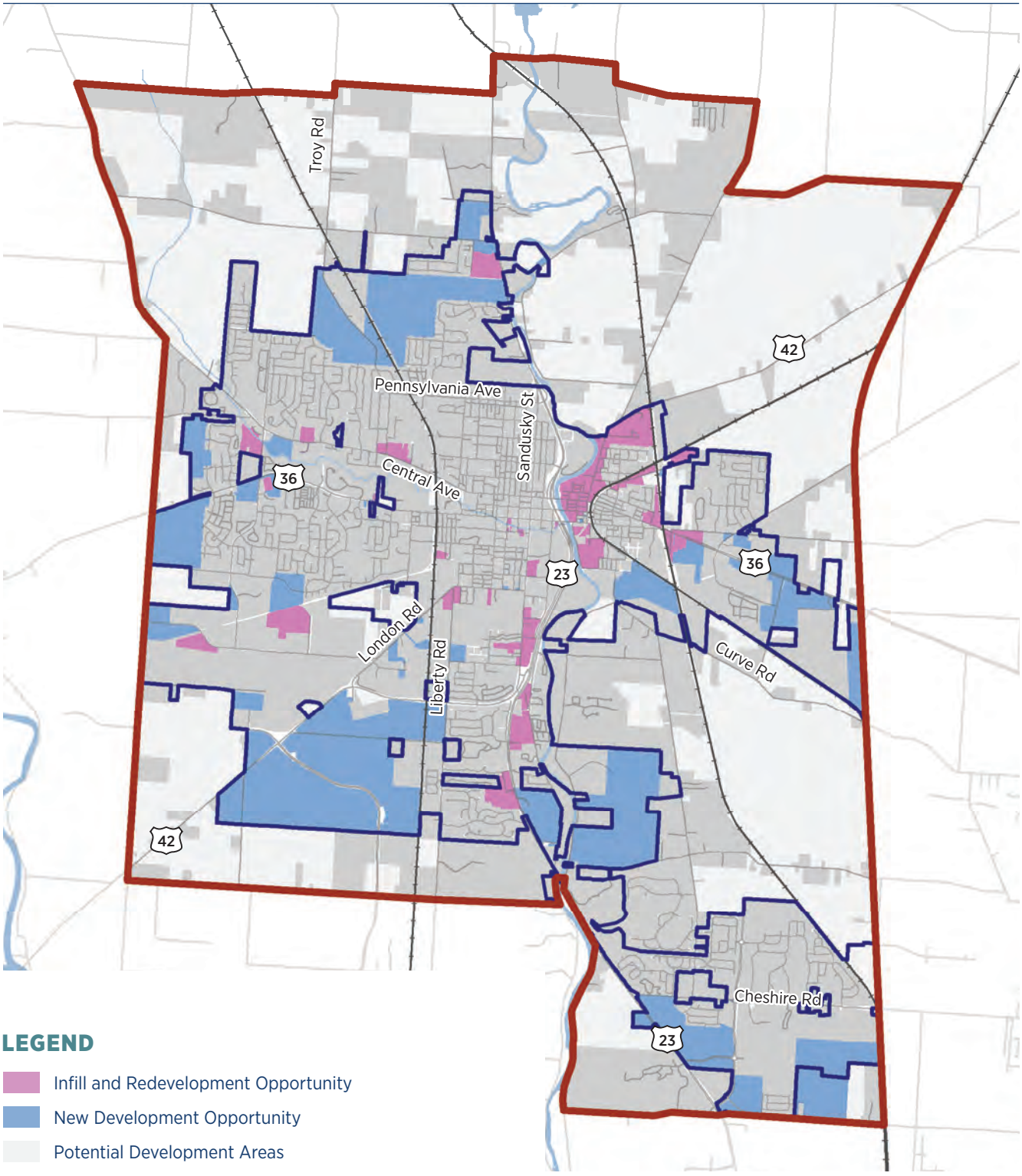
This map shows areas within the City boundary where redevelopment and/or infill opportunities may be possible. It is a first step in an analysis of where and how Delaware has potential to grow within its current limits. There are clear fiscal, sustainability, transportation and other advantages of directing growth to locations that are already partially developed or adjacent to existing development.

Areas in pink (Infill and Redevelopment Opportunity) are platted lots with structures that generally have a ratio of less than 2:1 improvement (house plus structures per the County Auditor) to land value and can therefore be deemed "underutilized" or are legacy retail or shopping centers with room for Infill or Redevelopment. Also included are residential properties that generally have fewer than five acres that were absent of any structures and commercial land since it tends to move as communities grow and most commercial uses update or change every 5-10 years. Parcels identified would likely be developed as traditional single lot infill sites unless consolidated.

Areas in blue (New Development Opportunity) are either vacant / partially vacant or agricultural in use and are generally greater than five acres (in most cases greater than 20 acres). Some of these properties are already in the City's pre-development pipeline (meaning they may be zoned, they have appeared in plans or development might have started). It is important to note that some may be more advantageous for development than similar sites outside of current City limits because they are adjacent to or surrounded by existing development and are currently or readily served by infrastructure. Their development could therefore provide a natural continuity with and complement developed areas. Guidance by the applicable Development Context designations should help to transition from existing development to new development.

Areas in light gray (Potential Development Areas) are locations outside of City limits where new larger-scale development is possible as detailed in the following map (New Development Opportunities).

Areas in dark gray (Committed) are platted but unbuilt subdivisions (pipeline development sites).



LEGEND

- Infill and Redevelopment Opportunity
- New Development Opportunity
- Potential Development Areas
- Committed
- Planning Area
- City of Delaware
- Roadway
- Railway

North

.75 1.5mi

NEW DEVELOPMENT OPPORTUNITIES OUTSIDE OF CITY LIMITS

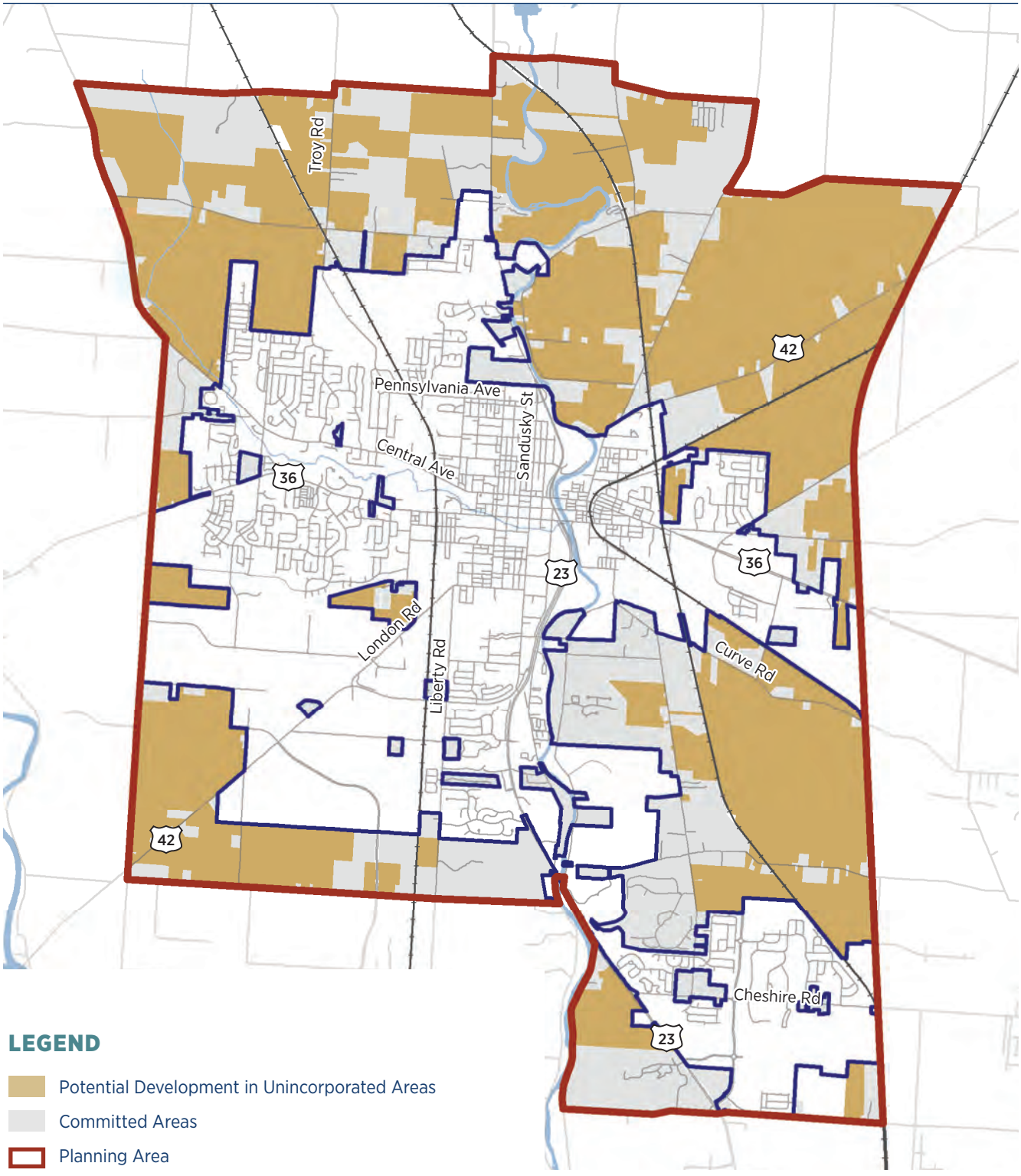
This map highlights locations where significant new development could take place outside of City limits but within the long-standing City utility boundary. These locations generally fall at the periphery or beyond exiting development and represent areas where significant changes might occur (for example, new and/or more intense land uses such as larger format mixed-use buildings, business parks or housing that is of a different scale or architectural style).

Areas in brown (Potential Development in Unincorporated Areas) are places where significant new development is possible. As detailed in Chapter 5, Character and Land Use, some areas, such as to the north, are appropriate to preserve as undeveloped in order to focus development, retain a strong urban-rural edge (limit sprawl), and protect agricultural and natural resources such as watersheds and wildlife habitats as noted within the plan.



Public Utilities state of the art water plant

NEW DEVELOPMENT OPPORTUNITIES OUTSIDE OF CITY LIMITS, BUT INSIDE UTILITY BOUNDARY

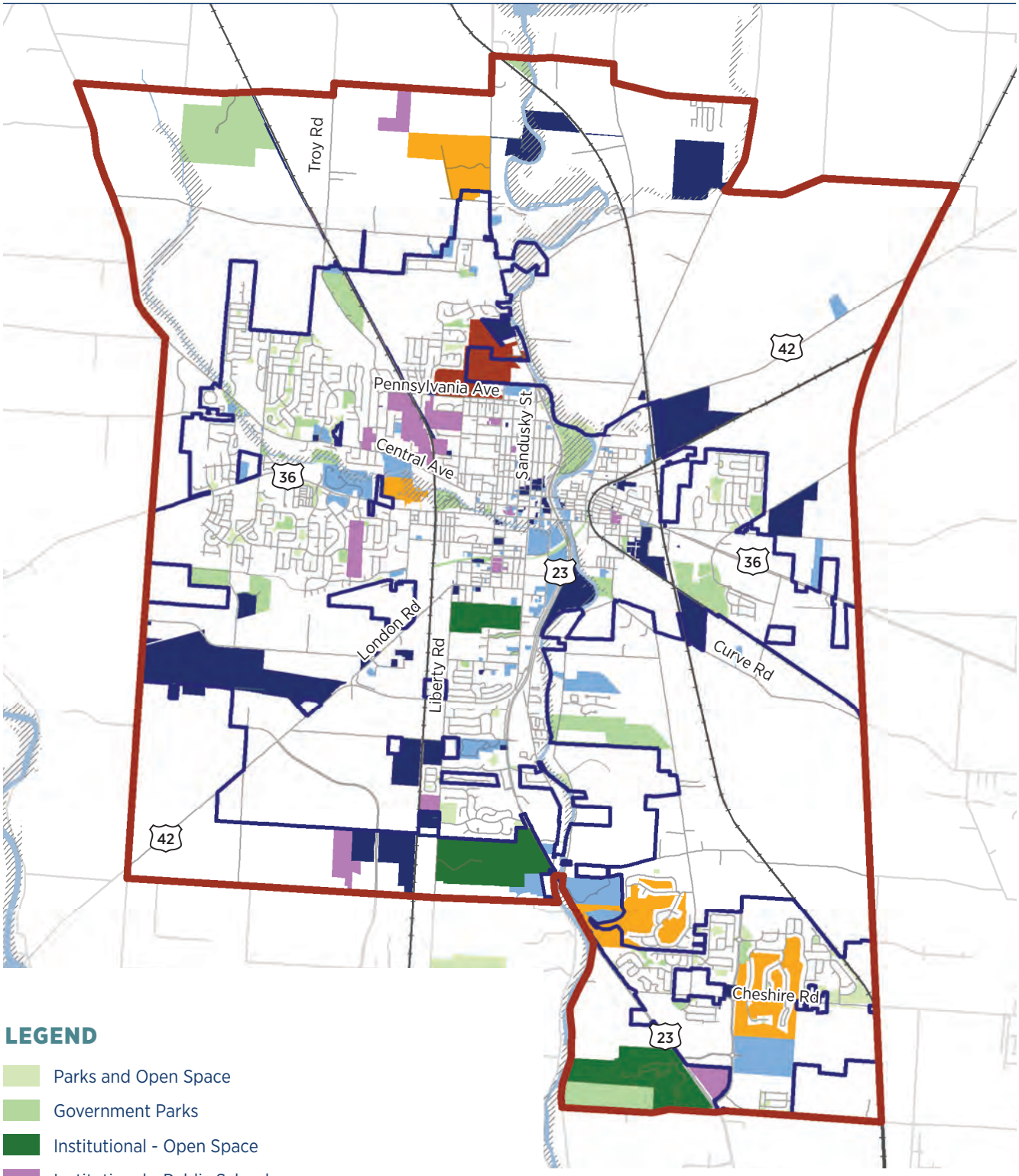


COMMUNITY NETWORK

The Community Network is a combination of existing public parks, protected private green spaces, clubs, and golf courses, proposed future green spaces, parks, and common spaces, and the potential corridors to connect these locations for wildlife and people via trails. The character of these areas varies from very natural to more urban and developed parks and plazas. Also included is institutional and government property, public schools, fairgrounds and golf courses. The Community Network is overlaid on other areas, as it represents specific characteristics and uses that exist within other types of development and established neighborhoods in Delaware. The map presents a picture of existing resources that can provide a foundation for future land use planning.



City Wetland Park and Dog Park in the Far East Side Focus Area.


Troy Rd
Pennsylvania Ave
Central Ave
Sandusky St
London Rd
Liberty Rd
Curve Rd
Cheshire Rd
42
36
23
LEGEND
Parks and Open Space
Government Parks
Institutional - Open Space
Institutional - Public Schools
Institutional - Other
Government
Golf Courses
County Fairgrounds
Floodplains
Planning Area
City of Delaware
Roadway
Railway
North
.75
1.5mi

TRANSPORTATION NETWORK

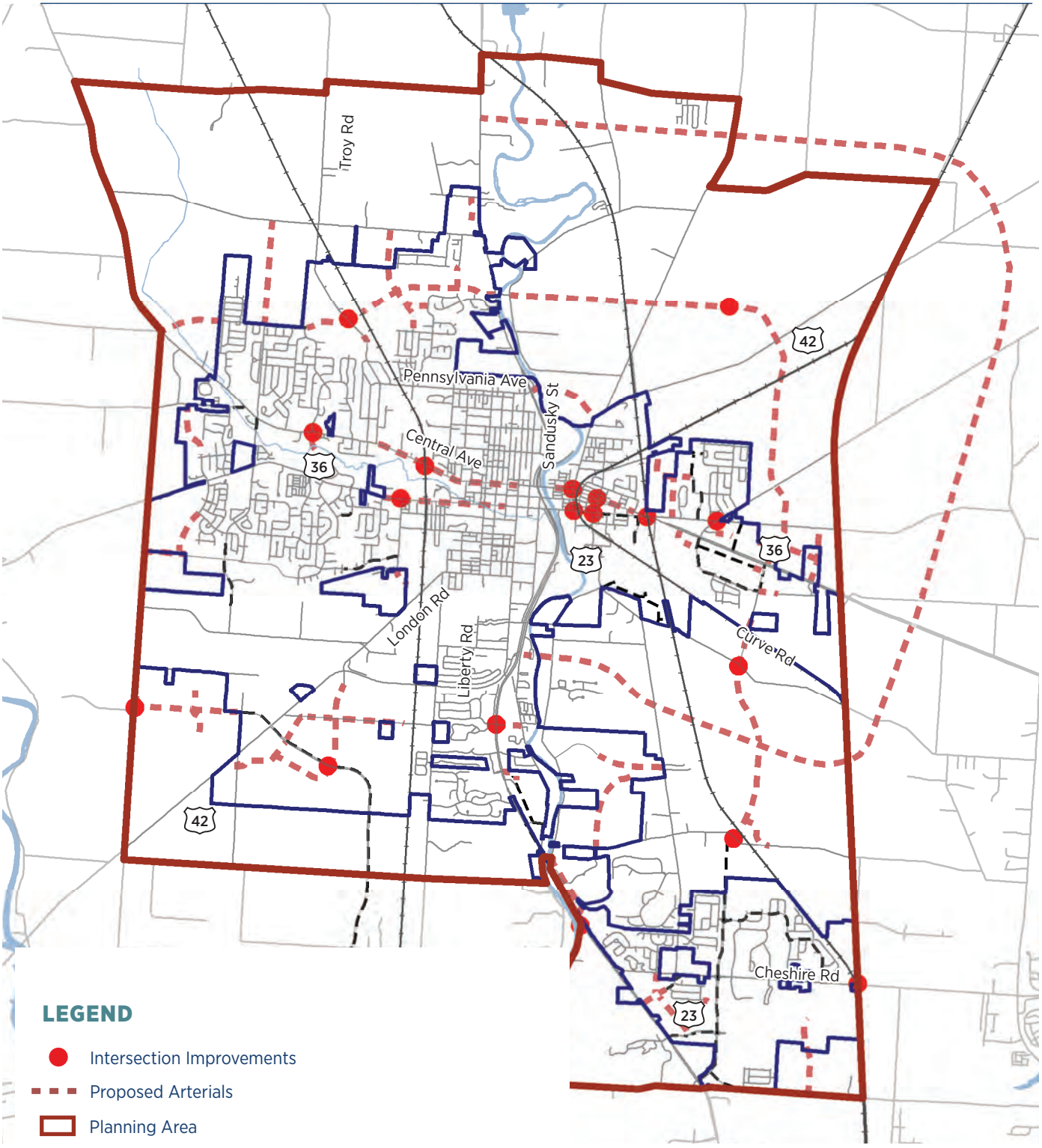
This map provides an overview of the transportation context, including existing major and minor roads as well as proposed arterials and intersection improvements (either as part of the City's Draft Thoroughfare Plan or that have been discussed in association with development of this plan). This map helps to show infrastructure that currently supports existing development or could support additional development in the future. The map is important because as new areas for development are considered it will be essential to ensure that sufficient infrastructure can support it. Conversely, there are locations where infrastructure exists or is planned that can help to inform where development should be encouraged.

There are several ongoing or planned significant transportation projects and studies which will impact the network and map on the adjoining page moving forward. These include:

- Byxbe Road (aka Glenn Road North) – This is a County led project building a new arterial from US 36/37 to SR 521 in the next 2 years. The intersection at US 36/37 will align with Glenn Road. Eventually, Byxbe Road will extend beyond SR 521 and will terminate at US 23 where Panhandle Road currently intersects US 23.
- The Point Improvements – These improvements will replace the "bottleneck" at the railroad bridge where US 36 and SR 37 converge on the east side of Delaware. The project will start early in 2023 and will take 2.5 years to construct.
- Central Avenue Improvements – The project will replace the pavement and widen the roadway from The Point to the Olentangy River with significant intersection improvements at Lake Street (US 42) and Channing Street. It is in the early planning stages and will include coordination with state and federal agencies.
- Merrick Parkway Alternatives Study – The study will examine alternatives to extending Merrick Parkway as an arterial beyond Troy Road. The study will analyze alternatives using other transportation network links and if (or how) the road should extend over the railroad tracks.
- Glenn Parkway Connection - This project will create a grade separation between the parkway and Norfolk & Southern railroad tracks as it extends from Berlin Station Road north to match the existing alignment of Glenn Road on the north at Curve Road and northward to US 36/37. The intersection of Glenn and Curve Roads will be a roundabout, as will all major intersections between Curve and Berlin Station.



View of Glenn Parkway at Berlin Station Road, which has been completed.


Troy Rd
Pennsylvania Ave
Central Ave
Sandusky St
London Rd
Liberty Rd
Curve Rd
Cheshire Rd
42
36
23
LEGEND
Intersection Improvements
Proposed Arterials
Planning Area
City of Delaware
Roadway
Railway
North
.75
1.5mi



Chapter 5
Character and Land Use

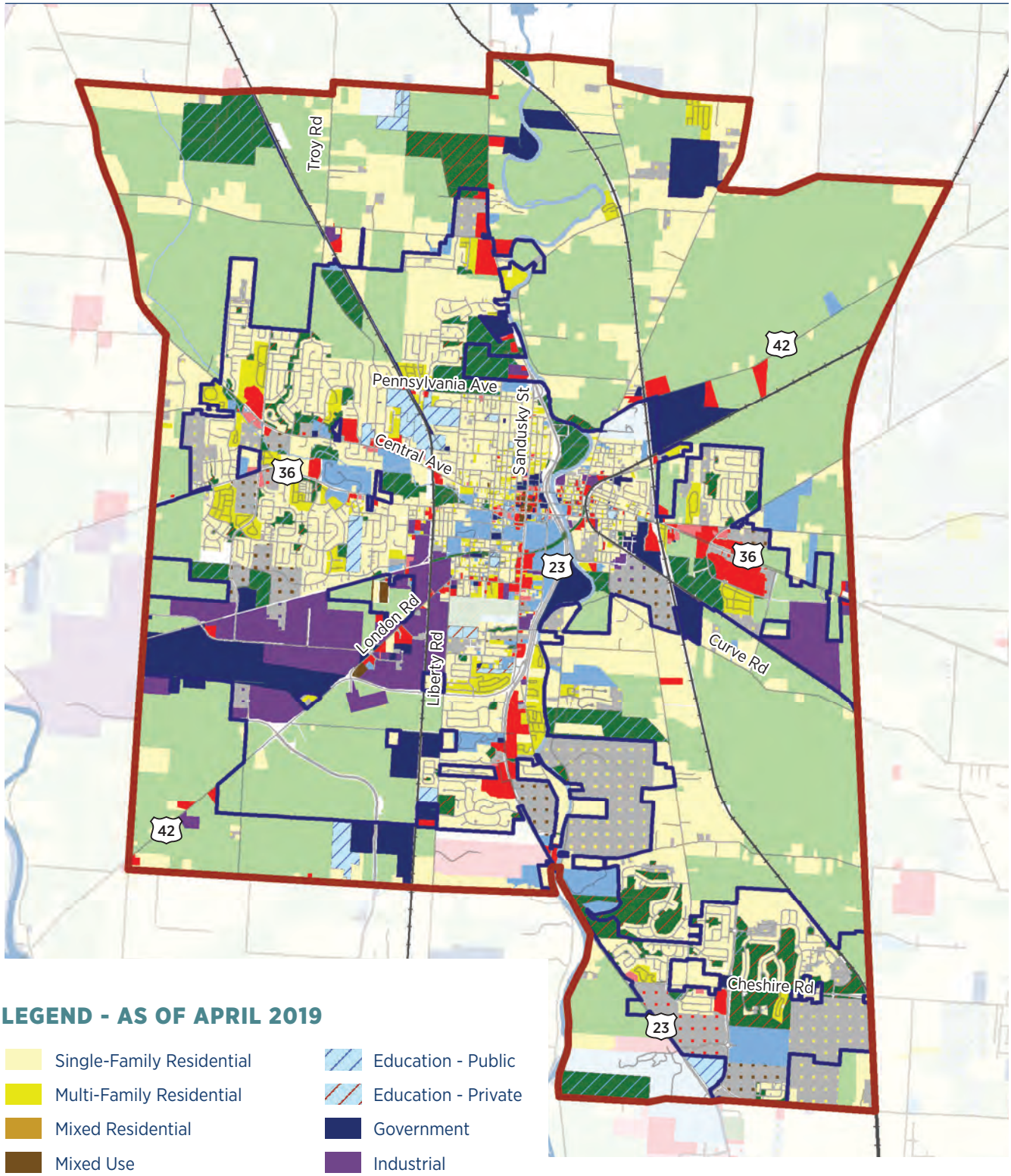
5. CHARACTER AND LAND USE

The Character and Land Use Plan is a tool through which decisions can be made throughout the City regarding where and how new development should take place. It has been developed in consideration of a range of factors including anticipated population growth, economic development objectives, the desire for high quality of life, housing trends, and fiscal needs. It has been informed by both technical analysis and input from the community.

APPROACH

Building off of the Development Framework (Chapter 4), this chapter includes three main components:

1. **Existing Land Use Map.** The map on page 57 shows existing land uses in the City using current land use classifications. Land use in the City of Delaware changes regularly and often. Thus this map represents only a snap shot in time in April 2019 but is useful to provide context and the overall complexity of land use in the community.
2. **Character and Focus Areas.** This section begins on page 58, followed by a map on page 59 that shows existing Character Areas in parts of the planning area that are not anticipated to experience significant change within the next ten years, as well as Focus Areas where change is anticipated. It is followed by more detailed information about each area.
3. **Development Types.** Development Types are the kinds of land uses, built character and intensity of development that describe the physical environment. Multiple Development Types have been determined to be appropriate in the future in each of the plan's Focus Areas. These are presented with text descriptions, illustrative photos, and figures, starting on page 81.



LEGEND - AS OF APRIL 2019

- Single-Family Residential
- Multi-Family Residential
- Mixed Residential
- Mixed Use
- Office
- Commercial
- Agriculture
- Parks and Open Space, Public
- Parks and Open Space, Private
- Semi-Public Institutions
- Education - Public
- Education - Private
- Government
- Industrial
- Transportation / Utilities
- Residential Vacant
- Commercial Vacant
- Mixed Use Vacant
- Agricultural Vacant
- Industrial Vacant
- Planning Area
- City of Delaware
- Roadway
- Railway

North

.75 1.5mi

CHARACTER AND FOCUS AREAS

This plan identifies Character Areas, which are neighborhoods, districts, or corridors that share similar attributes in their form and function. These areas are expected to remain relatively unchanged in character within the next ten years and the Development Types within them are anticipated to remain largely the same within this period.

In addition to the Character Areas, six Focus Areas have been identified. The Focus Areas are locations where significant change can reasonably be expected to occur within the next ten years. This plan presents specific Development Types for the Riverfront, Near East Side Gateway, South Sandusky Street and Far East Side Focus Areas and Concept Maps for the Southwest and Southeast Focus Areas. It is the recommendation of this Comprehensive Plan that Area Plans are completed for the Southeast and Southwest Focus Areas following the adoption of this Comprehensive Plan to determine the specific Development Types for these areas.

Both Character Areas and Focus Areas are comprised of different Development Types. Character Areas are anticipated to generally retain the same development types over the next decade whereas Focus Areas could reasonably expect to see significant change in development types.

Character Areas
Neighborhoods, districts, or corridors with similar attributes in form & function. Expected to remain largely unchanged in character within ten years.

- Traditional Residential
- Suburban Residential
- Rural Residential
- Rural Conservation
- Activity District
- Downtown
- Business Campus
- OWU (Ohio Wesleyan -University) District

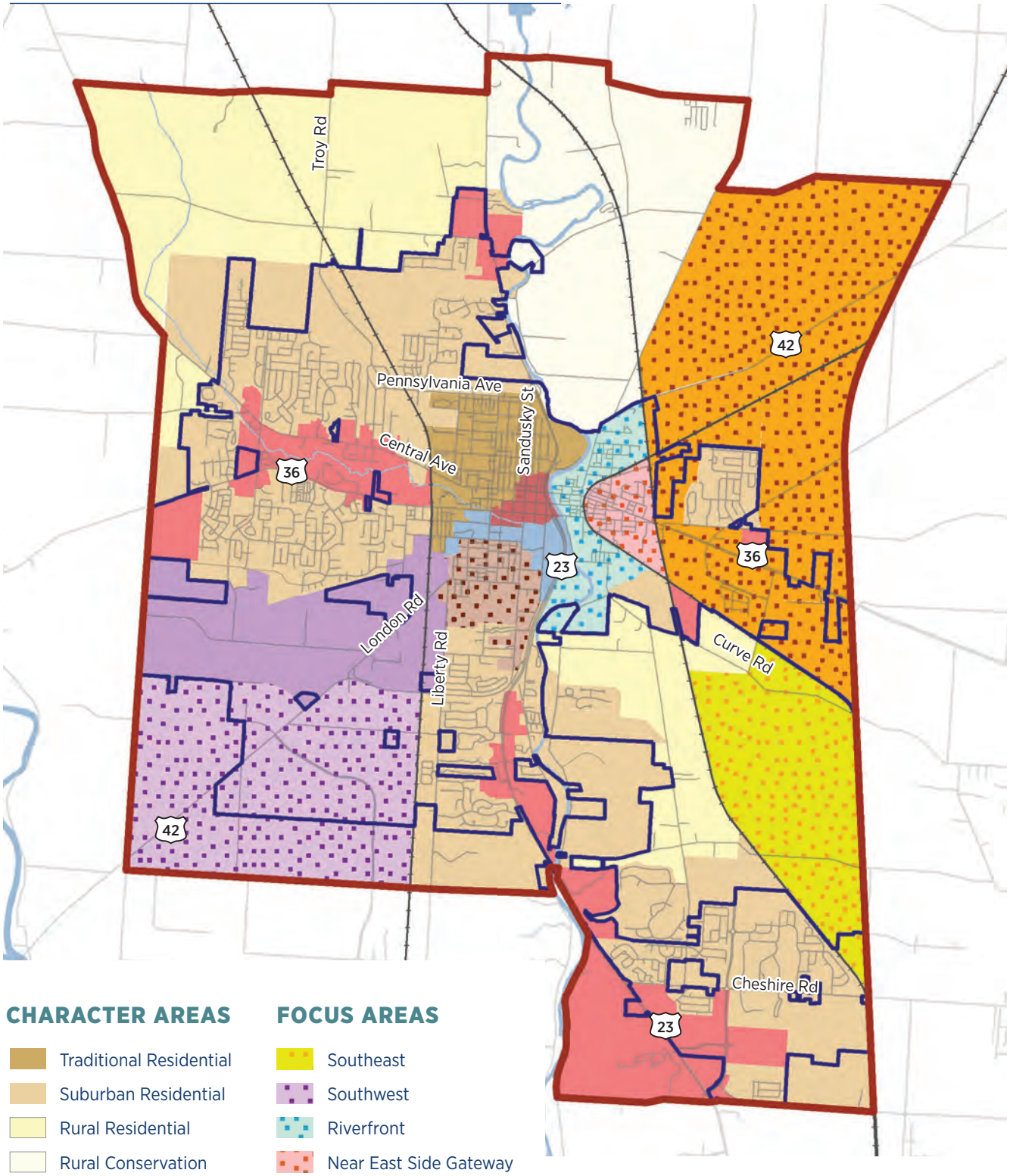
Focus Areas
Locations where desired significant change expected within ten years.

- Riverfront
- Near East Side Gateway
- South Sandusky Street
- Far East Side
- Southwest
- Southeast

Development Types
Kinds of land uses, built character, & intensity that define an area.

- Traditional Town/Urban
  - Traditional Small Lot-Single Family
  - Traditional Medium Lot-Single Family
  - Traditional Small Block Neighborhood
  - Neo-Traditional Small Block Neighborhood
  - Traditional Large Block Neighborhood
  - Traditional Activity District (Mixed Use)
- Suburban Neighborhoods
  - Early Suburban Single-Family
  - Late Suburban Single-Family
  - Multifamily Complex
  - Suburban Mixed Residential
- Suburban Activity & Employment Destination
  - Neighborhood-Scale Activity Center
  - Community-Scale Activity Center
  - Regional-Scale Activity Center
  - Commercial Corridor
  - Business Campus Activity Center
- Special Districts & Master Planned Campuses
  - University Campus
  - Government Campus
  - Hospital/Medical Campus
  - Fairgrounds
  - Camps or Ecological Conservation Campus
  - Eco-Village
- Rural/ Agricultural
  - Rural Subdivision
  - Rural Frontage (Legacy Township Development)
  - Agriculture

EXISTING CHARACTER AREAS AND FOCUS AREAS MAP



TRADITIONAL RESIDENTIAL

Traditional Residential Character Areas are found in the central city, inner-ring areas and within a couple of blocks off major corridors throughout Delaware. They include the earliest residential development in the City and the more historic neighborhoods. Traditional and contemporary architectural styles have a place in Traditional Residential Character Areas, but scale is generally consistent with older style homes. The density, height, and scale of buildings in Traditional Residential Character Areas typically decrease the further from the central business district they are.

KEY ATTRIBUTES

- Neighborhoods are walkable and pedestrian-oriented as they developed primarily before automobiles were the dominant transportation option.
- Streets and rights-of-way are wide and typically straight with wide sidewalks and tree lawns found on both sides of the street.
- There is a clear and interconnected network of streets and a rectilinear or grid pattern with varied block sizes (but generally larger than the blocks in the Downtown).
- Alleyways are not common but can be retrofitted in redevelopment or infill projects in these areas.
- The subdivision of lots is semi-regular within a block with small, equally sized parcels, typically meeting mid-block. In some locations, multiple smaller lots are consolidated to accommodate larger buildings. Deeper lots are typically found along major roads.
- Buildings are set back from the street by small to medium front yards with front doors or entrances located on the main facade. Front yard setbacks are typically consistent along a block. Exceptions are for larger buildings like schools that occupy most of a block.
- Individual lots may have only one narrow side yard and have a zero-lot line setback (structure comes up to, or very near to, the edge of the property) from front or side property lines, especially close to the Downtown or on narrow blocks.
- Building types may be mixed on a block but setbacks are typically consistent, and the scale of adjacent buildings is similar, unless multiple lots have been consolidated to provide a larger yard around a larger building.
- Many lots have dedicated driveways and/or parking areas, such as surface parking, driveways, or detached garages, located in the interior of the block. On-street parking is also common.
- Open spaces in the form of neighborhood parks, linear parks, and greens are important open space elements in a more densely developed neighborhood.
- Architectural detailing is human scale, shares many characteristics with single family development proportions including frequent windows, front entrances, porches, stoops, and/or balconies. The majority of buildings are one to three stories.

PLANNING GUIDELINES

Traditional Residential Character Areas are established areas in Delaware. The development context is generally preservation or adaptive re-use. The preferred planning approach for these areas is to protect and enhance the existing character, focusing on property maintenance, architectural preservation of contributing buildings, context-sensitive infill, and adaptive re-use. When warranted by significant decline in occupancy or condition of existing properties, context sensitive redevelopment is also appropriate.

APPROPRIATE DEVELOPMENT TYPES*

- Traditional Small Lot-Single-Family
- Traditional Medium Lot Single-Family
- Traditional Small Block Neighborhood
- Neo-Traditional Small Block Neighborhood
- Traditional Large Block Neighborhood
- Traditional Activity District (Mixed-Use)

* Development Types are described in detail on pages 81-90.





Houses in Delaware's Northwest Neighborhood.

SUBURBAN RESIDENTIAL

Suburban Residential Character Areas are found toward the perimeter of the current city limits and along corridors. These areas include existing, post-1940s subdivisions and the car-oriented, non-residential corridors associated with them. They are primarily characterized by individual subdivisions or neighborhoods with a specific street and block patterns adjacent to other subdivisions or neighborhoods with a different patterns. A common characteristic of these neighborhoods is homogenous housing types and architectural styles in a block, along a street, or clustered in pods around a common open space. However, types vary between areas, ranging from detached single-family to multi-family complexes. Driveways, garages, and accommodation of the car is predominant.

KEY ATTRIBUTES

- The street network is typically curvilinear with irregular block structure. It may have limited points of connections and frequent use of culs-de-sac, especially in subdivisions developed between 1980 and 2000.
- Streets vary in width from 30-foot rights-of-way to 60-foot rights-of-way. Sidewalks are common.
- Blocks vary in dimension by subdivision and may be similar to an urban block or be less defined and more organically shaped by the landscape or former parent lot (lot that existed prior to development).
- The pattern within each subdivision is typically very consistent in terms of lot size. Lot shape may vary and include rectangular parcels, wedge/pie shaped parcels consistent with a more curvilinear street network, or other shapes.
- Buildings are typically located near the center of the lot, with similarly sized front and back yards, and often present the wider façade to the street with the greatest dimension of the lot being the frontage width.
- Attached garages with driveways are common.
- Housing types are typically developed in separate subdivisions (multi-family, single-family, townhouses). Mixing of housing types within a block or along a street is uncommon.
- Buildings are typically one to three stories, with some four-story buildings in multi-family complexes.
- Architectural details may vary within each subdivision depending on the mix of residential types and era of construction. Infill development respects the existing horizontal and vertical proportions of homes as well as location and orientation of buildings on the lots.
- Open space, when present, is provided in an informal and passive manner as well as through neighborhood recreation facilities and clubhouses. In older, larger lot Suburban Residential Character Areas there is usually limited public open space. More recently built areas are more likely to have common open spaces and parks.

PLANNING GUIDELINES

Existing Suburban Residential Character Areas represent established and stable development in Delaware that are not likely to see significant new development and change. For this reason, the applicable development context is infill and the planning approach for these areas should be to maintain and enhance the character of existing development. New Suburban Residential Character Areas should embrace the trends of more recent subdivisions toward incorporating public open space and pedestrian accommodations, adhering to high quality design standards and integrating conservation development principles, such as retaining natural features and encouraging more clustered development to allow for more open space. Where feasible, integrating or promoting proximity to Activity Districts is also desirable to maximize residential access to commercial goods and services and reduce car-dependence.

The critical factors to consider in design and any improvements include:

- Maintaining or improving the connectivity of roads to provide alternative routes and reduce traffic congestion on major roads.
- Improving the connectivity between destinations and residential areas through completion of sidewalk and trail connections.
- Providing adequate common open spaces in developments with small individual yards to offset the compact character of the built areas.
- Encouraging the use of alleys and rear loaded garages whenever feasible to increase the walkability of new neighborhoods by removing driveways and curb cuts from residential streets.
- Establishing transitional zones in each new subdivision that allow for step up or step down between types of housing to adjacent neighborhoods.
- Requiring tree lawns along all residential streets or consider deep enough front yards that large species shade trees can be planted and maintained in front yards.
- Requiring infill projects to match the size, scale, and setback of existing homes.
- Addressing stormwater impacts and mitigation.

APPROPRIATE DEVELOPMENT TYPES*

- Traditional Small Lot-Single-Family
- Traditional Medium Lot Single-Family
- Traditional Small Block Neighborhood
- Traditional Large Block Neighborhood
- Early Suburban Single-Family
- Late Suburban Single-Family (Existing)
- Multi-Family Complex (Existing)
- Commercial Corridor (Existing)
- Suburban Mixed Residential
- Neighborhood-Scale Activity Center
- Community-Scale Activity Center
- Fairgrounds
- Camps or Ecological Conservation Campus
- Eco-Village
- Natural Conservation/Preserves

* Development Types are described in detail on pages 81-90.





RURAL RESIDENTIAL

Rural Residential Character Areas are found in a few areas outside the current City limits in adjacent Townships. These areas are comprised primarily of existing subdivisions that were developed in the township under township zoning. Individual homes may rely on on-site septic and wells for water or may have on-site sewage treatment and City water. Individual lots range from one to ten acres in size. These areas are primarily characterized by one or two local streets or private drives with a modest number (ten to 30 homes) or lots with direct access to township or county roads with no internal local streets (frontage lots). These development patterns are common in areas where frontage was sold off from a farm over time, or when a moderate sized piece of farmland was developed. Rural Residential Character Areas accommodate primarily detached single-family homes ranging in style from brick ranches common in earlier decades to contemporary, luxury custom homes. Larger lots allow for side and rear loaded garages, wide-façade homes, sizable accessory structures, landscaping and in some cases integration of natural features into the private properties.

APPLICABLE PLANNING CONTEXT GUIDELINES

Rural Residential Character Areas include established and stable development within the planning area but currently outside of the City's jurisdiction. (As the City continues to grow outward, these areas are at risk of being left as unincorporated islands unless appropriate zoning and other regulations are in place.) The planning approach for these areas is to maintain and enhance the character of development. The most likely Development Context for these areas will be Infill or Suburban Edge Development.

Suburban or urban design standards should not be enforced on these areas. It is not anticipated that these areas will be annexed within the ten-year timeframe of this plan but if annexation is to occur, future subdivision of large lots is discouraged, unless wholesale redevelopment and infill is adopted. This is not a recommended Character Area for new subdivisions.







APPROPRIATE DEVELOPMENT TYPES*

- Rural Subdivision
- Rural Frontage
- Natural Conservation/Preserves
- Fairgrounds
- Camps or Ecological Conservation Campus
- Eco-Village

* Development Types are described in detail on pages 81-90.

RURAL CONSERVATION

Rural Conservation Character Areas are found in Troy Township in the unincorporated northern part of the City's planning area. This development type primarily represents existing agricultural and natural landscapes with areas of low density rural residential development in frontage lots or large lot subdivisions. Both the Scioto and Olentangy Rivers and their floodplain and riparian corridors are significant corridors in the Rural Conservation Area.

APPLICABLE PLANNING CONTEXT GUIDELINES

The City has no immediate plans to annex land in this area and supports the County and Township's efforts to maintain agricultural production in this area with very limited rural residential development. The concept is not just to retain these areas for future growth, but to conserve the rural heritage and agriculturally productive land that is important to the region and City's identity and character.



APPROPRIATE DEVELOPMENT TYPES*

- Agriculture
- Rural Subdivision
- Rural Frontage
- Natural Conservation/Preserves
- Fairgrounds
- Camps or Ecological Conservation Campus
- Eco-Village



* Development Types are described in detail on pages 81-90.



ACTIVITY DISTRICT

Activity District Character Areas are nodes that provide local and regional destinations for the community. Some include retail and commercial uses that are smaller scale, serve a local population and are more pedestrian-oriented. Others accommodate community or regional-scale commercial uses, are more car-oriented and larger in scale. Some also serve a "gateway" function, marking entrance points into the City. In addition to commercial activities, these districts incorporate a mix of other uses, including institutional, residential and open space/recreational.

APPLICABLE PLANNING CONTEXT GUIDELINES

Both Infill and Redevelopment are appropriate development contexts for Activity District Character Areas. In many cases, taking advantage of infill opportunities can help to intensify uses in such a way as to maximize the potential of existing infrastructure and limit the need for suburban edge development in other locations. Redevelopment is appropriate in locations where certain types of buildings are functionally underutilized or market conditions changed. In some activity districts public realm improvements and amenities (such as pocket parks, bicycle lanes, street furniture, lighting, public art, etc.) offer the potential for improving quality of place and making areas more appealing as destinations for both residents and visitors.

APPROPRIATE DEVELOPMENT TYPES*

- Neighborhood-Scale Activity Center
- Community-Scale Activity Center
- Regional-Scale Activity Center
- Suburban Mixed Residential
- Multifamily Complex
- Commercial Corridor
- Fairgrounds
- Camps or Ecological Conservation Campus
- Hospital/Medical Campus
- Natural Conservation/Preserves

* Development Types are described in detail on pages 81-90.







DOWNTOWN

Downtown Delaware is the historic, civic and cultural center of the City. Buildings are located very close to one another and in many cases are adjoined. It accommodates a wide variety of intense land uses and is expected to see additional intensification to house a growing residential population in the future to go along with the mixed land uses already in the Downtown. Street pattern is a grid with short blocks and frequent intersections established in the early 1800s. Streets accommodate moderate traffic at slow speeds and include on-street parking.

APPLICABLE PLANNING CONTEXT GUIDELINES

The Development Context is a combination of Preservation, Adaptive Re-use, and Infill and Redevelopment. New development is encouraged to fill in vacant sites such as underutilized parking areas or unused buildings. Redevelopment opportunities that promote street-level activation and the productive use of upper stories for commercial or residential space are especially encouraged. Demolition of historic fabric is strongly discouraged. Amenities for pedestrians such as wide sidewalks, street trees and benches should be incorporated.

APPROPRIATE DEVELOPMENT TYPES*

- Traditional Activity District (Mixed Use)
- Traditional Small Block Mixed Neighborhood
- Neighborhood-Scale Activity Center

* Development Types are described in detail on pages 81-90.







BUSINESS CAMPUS

Employment-oriented uses in this Character Area are characterized by light industrial-style development, office, business park, and boutique manufacturing. Large footprint structures offer flexible space to accommodate market demand for various users. Buildings are oriented to the street and can be adapted to support different uses such as light manufacturing, high-tech industries and research & development.

APPLICABLE PLANNING CONTEXT GUIDELINES

For the existing built-out portions of the Character Area the Development Context is a combination of Infill, Redevelopment and Adaptive Re-use in recognition of the fact that there are opportunities for development on certain properties, that some facilities may be obsolete and need to be demolished so that newer facilities can be built and that some facilities could be repurposed as industry demands change. For other portions of the area that are undeveloped, the Development Context is suburban edge development.

APPROPRIATE DEVELOPMENT TYPES*

- Industrial Campus Activity Center
- Industrial (Corridor Industrial)
- Commercial Corridor
- Community-Scale Activity Center
- Regional-Scale Activity Center
- Late Suburban Single-Family (on greenfield sites)
- Multifamily context (on greenfield sites)
- Suburban Mixed Residential (on greenfield sites)

* Development Types are described in detail on pages 81-90.







OHIO WESLEYAN UNIVERSITY (OWU) DISTRICT

Centered around the fountain, a "town square," between Beeghly Library and the Hamilton Williams ("Ham-Wil") Campus Center, the Ohio Wesleyan (OWU) Campus is an attractive, welcoming environment directly south of Delaware's downtown. The core of the campus clusters buildings in a walkable pattern. It contains an academic core, as well as residential facilities on the west side of campus. Parking areas are integrated throughout but generally located in more peripheral locations

APPLICABLE PLANNING CONTEXT GUIDELINES

The Development Context for the OWU District is a combination of Preservation and Infill and Redevelopment. Close coordination between City and campus planning activities is essential to create edge conditions between the campus and City that benefit both the University's functions and the quality of place in the surrounding community.

APPROPRIATE DEVELOPMENT TYPES*

- University Campus
- Traditional Small Lot Single-Family
- Traditional Medium Lot Single-Family
- Traditional Small Block Mixed Neighborhood
- Traditional Large Block Mixed Neighborhood
- Traditional Activity District (Mixed Use)



* Development Types are described in detail on pages 81-90.

COMMUNITY NETWORK

The Community Network is comprised of public parks and a wide variety of recreational spaces as well as institutional and government property, public schools, fairgrounds and golf courses that serve as amenities for community members.

APPLICABLE PLANNING CONTEXT GUIDELINES

Preservation and enhancement of these spaces should be prioritized with special attention to creating opportunities for connections between spaces and between them and residential areas. New opportunities to build upon the network should be identified, especially in new residential subdivisions or mixed-use areas. The Development Context for existing spaces will primarily be Preservation.



SOUTHEAST FOCUS AREA

The large (approximately 1,500 acres) undeveloped southeast district is a portion of the planning area that could be a focus for new development that includes a combination of development types. It provides significant opportunity to increase the number and variety of housing units while also integrating a range of other uses. Significant planned infrastructure improvements, such as the Glenn Parkway Extension, and the adjacency to several existing amenities offer great potential for this area to meet a range of needs for the City in the next ten years. A detailed area plan is needed in order to further develop the specific character and land use plan for this area.

GUIDANCE FOR AREA PLANNING

- Support development around the Glenn Parkway Extension that allows for commercial and mixed use development as well as some residential development.
- Create different scale activity nodes within neighborhoods the area.
- Use landscaping buffers between adjacent neighborhoods and new development in this area and adjacent neighborhoods where appropriate.
- Encourage walkability and connectivity by extending the Community Network into the area and integrating neighborhood-scale parks.
- Transition from suburban commercial to rural residential as it is located farther away from Glenn Parkway.
- In residential areas allow a range of block sizes, including large to medium "blocks" with some curvilinear streets to continue the suburban character found in other portions of Delaware while also allowing mixed residential and multifamily closer to activity nodes, Glenn Parkway, US36/37, and along the major backbone road network such as the concept roads shown on the following diagram
- In some nodes, there may be a village pattern similar to how Delaware historically developed, as a denser core with smaller blocks, and neighborhoods that get slightly less intense in use further from the center.
- In other nodes community scale activity centers integrated with their surrounding medium and low density neighborhoods in both pattern and character.

APPROPRIATE DEVELOPMENT TYPES*

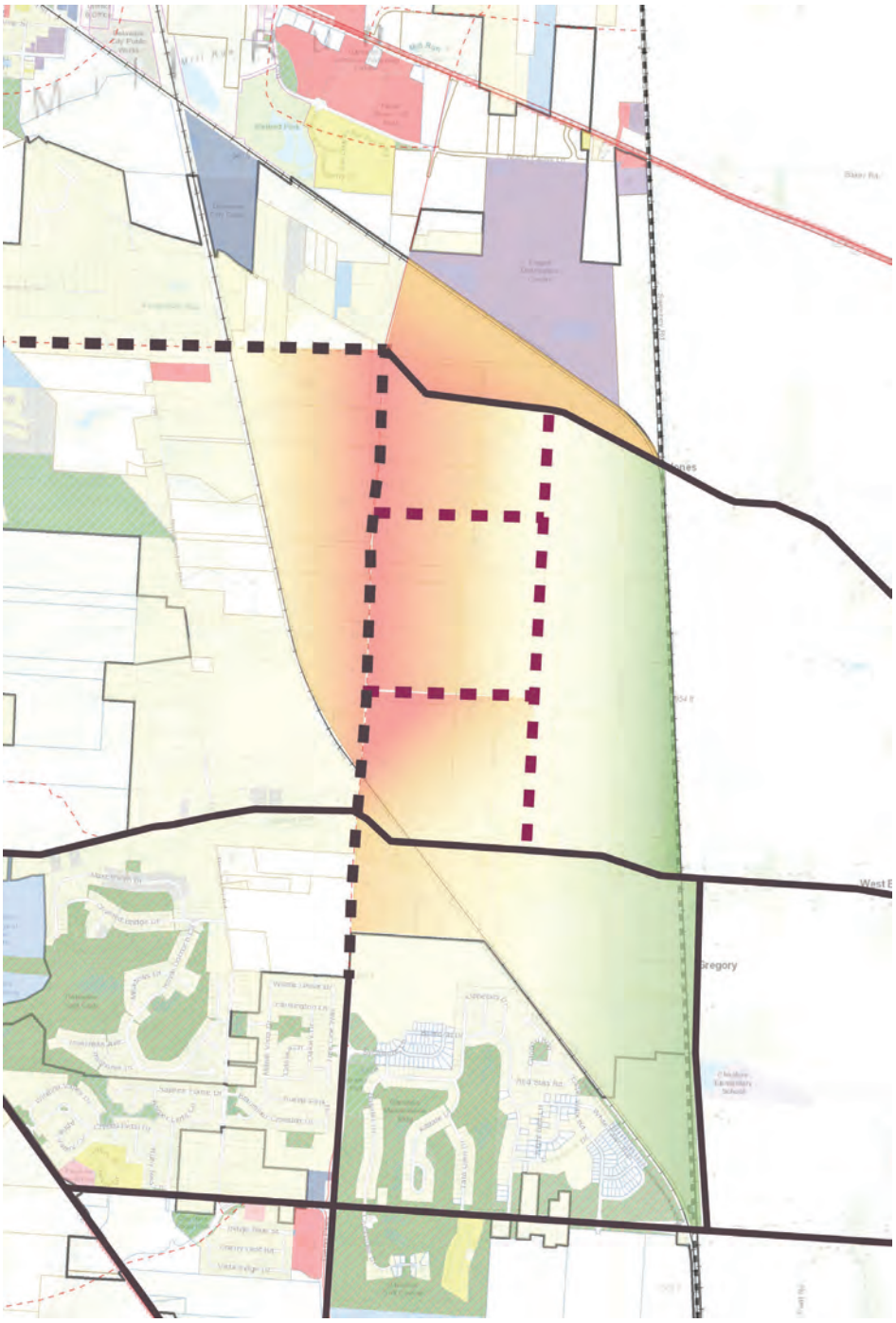
- Commercial Corridor
- Suburban Neighborhoods
- Industrial (Corridor Industrial)
- Suburban Mixed Residential
- Suburban Residential
- Rural Subdivision
- Community-Scale Activity Center
- Regional-Scale Activity Center
- Suburban Neighborhood
- Traditional Activity District (Mixed Use)
- Neo-Traditional Small Block Neighborhood
- Traditional Large Block Neighborhood

* Development Types are described in detail on pages 81-90.



Ranch style Garden Apartments, like those that have been developed at Quail Pass behind the Glennwood Commons shopping center, could provide an opportunity for accessible housing in the Southeast Focus Area.

SOUTHEAST FOCUS AREA CONCEPT



LEGEND

- Suburban Residential
- Commercial Corridor (Neighborhood)
- Suburban Mixed Use / Traditional Small Block Residential
- Suburban Mixed Residential
- Concept Roads

Note: Map created in 2019. Concept roads do not reflect current thoroughfare plan and will be adjusted through area planning process.

SOUTHWEST FOCUS AREA

The large (approximately 2,000 acres) southwestern quadrant of Delaware has three areas that are loosely categorized or marketed as the "business parks" delineated below: the Delaware Business Park, the Innovation Park and the Delaware Crossing Business Center. The Delaware Business Park includes a number of the City's large and small industrial businesses. The newer Innovation Park (including Symmetry II) is located on the south side of the Delaware Municipal Airport. Some of these areas have a conventional pre-existing industrial park character that is expected to largely remain. South of the airport and US 42, however, there is opportunity for a more mixed-use environment in and around the Delaware Crossing Business Center, and the hundreds of acres south of this area and east of US 42. This should be the focus for an area plan.

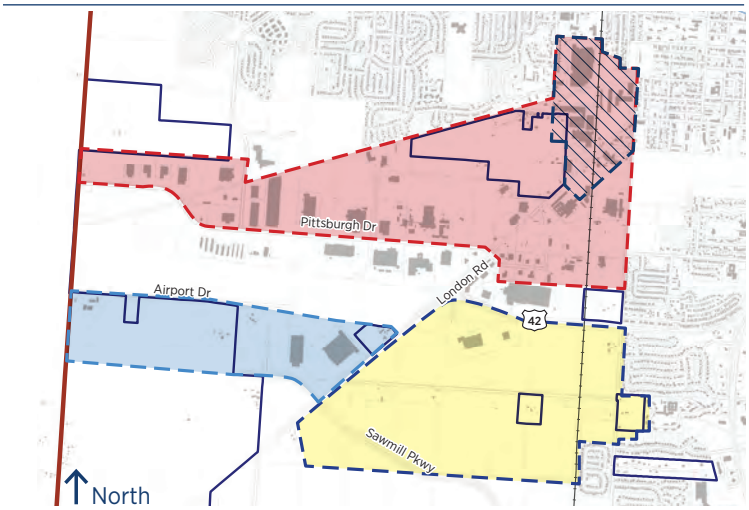
GUIDANCE FOR AREA PLANNING

- Support mixed employment uses in certain locations including large lot subdivisions (over 100,000 square feet) to accommodate existing and potential new types of businesses.
- Accommodate flex buildings that allow for a wide range of office and warehouse uses.
- Strengthen the existing Delaware Industrial Park by assembling sites in undeveloped portions and creating amenity value (e.g. trailways).
- Create nodes and gateways in the Delaware Industrial Park (London Road at Pittsburgh and US 42).
- Strengthen Delaware Crossing to focus on tech/industrial West of US 42, an amenity node at US 42 and Sawmill Road and a corporate business park east of US 42.
- Redefine the Central Industrial Area as a mixed-use urban industrial district with streetscape improvements and corridors (e.g. London Road to Sandusky, Curtis Street).
- Integrate new uses at key nodes (e.g. London Road at Liberty Road) and provide opportunities for new industries such as food and beverage (e.g. craft brewery, restaurants)
- Re-envision low-performance office buildings as maker/tech spaces.
- In the Central Industrial Area, integrate residential uses, especially workforce housing.
- Work with non-profit partners on projects that help to create amenity value through delineated greenways and fitness trails.

APPROPRIATE DEVELOPMENT TYPES

- Industrial Campus Activity Center
- Industrial Corridor
- Commercial Corridor
- Suburban Neighborhood
- Suburban Mixed Residential
- Rural Subdivision
- Activity Center
- Traditional Small / Large Block Neighborhood

SOUTHWEST INDUSTRIAL AREA MAP



LEGEND

- Delaware Business Park
- Central Industrial Area
- Delaware Crossing Business Center
- Innovation Park / Symmetry II



LEGEND

- Suburban Residential
- Suburban Mixed Use / Traditional Small Block Residential
- Commercial Corridor (Neighborhood)
- Business Campus
- Suburban Mixed Residential
- Concept Roads

Note: Map created in 2019. Concept roads do not reflect current thoroughfare plan and will be adjusted through area planning process.

RIVERFRONT AND NEAR EAST SIDE GATEWAY FOCUS AREAS

This is the existing neighborhood and business district east of Downtown, starting at the Olentangy River as its western boundary. It includes traditional and suburban residential development, major neighborhood and community scale commercial corridors, and railroad-oriented industrial and service businesses in a compact walkable area.

GUIDANCE FOR AREA PLANNING

- Encourage character and land use changes to support riverfront redevelopment.
- Improve riverfront access from both Mingo Park and the neighborhoods on the west side of the river.
- Enhance pedestrian and bicycle connections between the eastern and western portions of downtown over the river.
- Identify areas for protection, preservation and enhancement and areas in need of comprehensive redevelopment.
- Promote attainable housing.
- Allow for selected intensification of uses where appropriate, including mixed-use, multistory buildings.
- Ensure redevelopment and infill in this area does not overburden infrastructure (such as roads and utilities) and does not detract from overall community character.
- Promote contextually sensitive redevelopment of the Greenwood Lake Camp on the northern boundary.
- Allow for the continued City Sewer Plant industrial use with possibility of long-term expansion southeast of Armstrong Road.
- Integrate historic preservation of significant buildings and features with revitalization of neighborhood-scale commercial space, entertainment venues and open space to promote neighborhood revitalization without loss of unique community character.
- Redevelop, re-use and reconfigure key areas in association with the US Route 36 improvements.
- Consider reducing parking requirements and allowing shared parking arrangements to enhance walkability while accommodating parking needs.

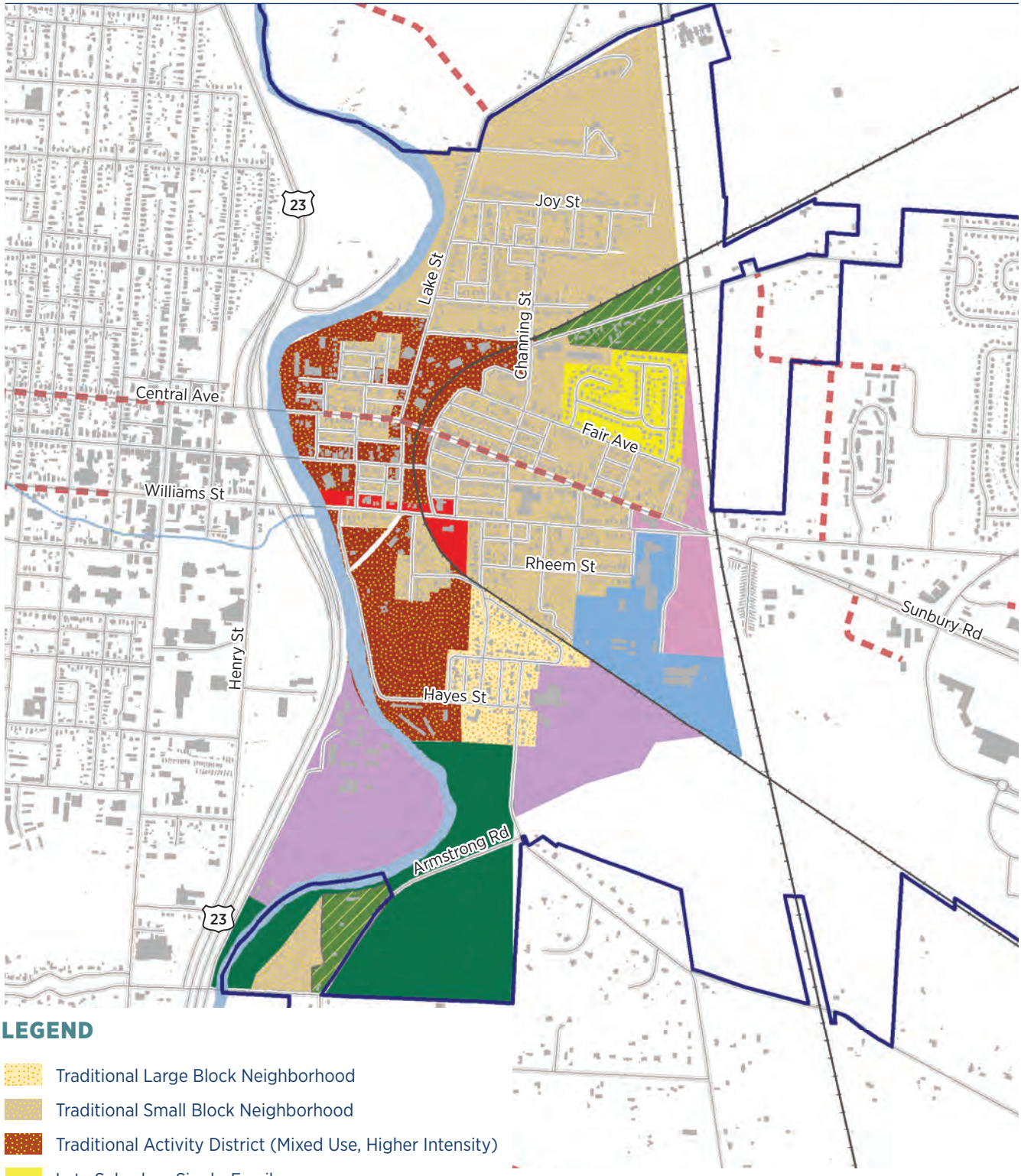
APPROPRIATE DEVELOPMENT TYPES

- Traditional Small Lot Single-Family
- Traditional Medium Lot Single-Family
- Traditional Small Block Neighborhood
- Traditional Large Block Neighborhood
- Traditional Activity District (Mixed Use)
- Early Suburban Single-Family
- Regional-Scale Activity Center
- Neighborhood-Scale Activity Center
- Community-Scale Activity Center
- Master Planned Developments
- Rural Subdivision
- Rural Frontage



The Downtown Riverfront area presents an opportunity for infill and redevelopment that takes cues from the scale and character of the existing scale and character and knits it together with compatible new construction.

RIVERFRONT AND NEAR EAST SIDE GATEWAY FOCUS AREA FUTURE CHARACTER MAP



LEGEND

- Traditional Large Block Neighborhood
- Traditional Small Block Neighborhood
- Traditional Activity District (Mixed Use, Higher Intensity)
- Late Suburban Single-Family
- Commercial Corridor (Neighborhood)
- Industrial
- Community-Scale Activity Center
- Government Campus
- Natural Conservation/Preserves
- Rural Frontage

- City of Delaware
- Roadway
- Proposed Roadways
- Railway

↑ North

SOUTH SANDUSKY STREET FOCUS AREA

This area includes a traditional neighborhood and one of the City's earliest automotive corridors along South Sandusky Street (formerly US Route 23). The neighborhood generally retains the historic street grid and uniform lots. Woodward Elementary School provides a civic anchor in the center of the neighborhood and adds to other civic anchors such as the large cemetery, the Second Ward Community Center, and the new headquarters for the Delaware Public Health District. Over time, much of the commercial development along Sandusky Street has become obsolete in its format and style. The primary focus of this area should be to encourage incremental redevelopment of the commercial properties along Sandusky Street and London Road and to maintain and enhance the neighborhood with stronger gateways, pedestrian-oriented design and access to housing improvement programs.

GUIDANCE FOR AREA PLANNING

- Redevelop and redesign the automotive corridors with more character appropriate uses.
- Improve existing housing in the area through maintenance, and upgrade financing options and community improvement programs related to energy efficiency upgrades, to reduce operating costs for homeowners.
- Protect and maintain the established community character including density, architectural scale, and tree cover.
- Promote attainable housing.
- Allow for selected intensification of uses where appropriate, including mixed-use, multistory buildings.
- Improve walkability of the Sandusky Street and London Road corridors.
- Provide attractive and functional gateways into the neighborhood.
- Maintain and enhance central community amenities including Ross Street Park and Woodward Elementary School.
- Support community enhancing retail, services and entertainment along Sandusky Street.
- Explore community needs to identify possible redevelopment opportunities along London Road.

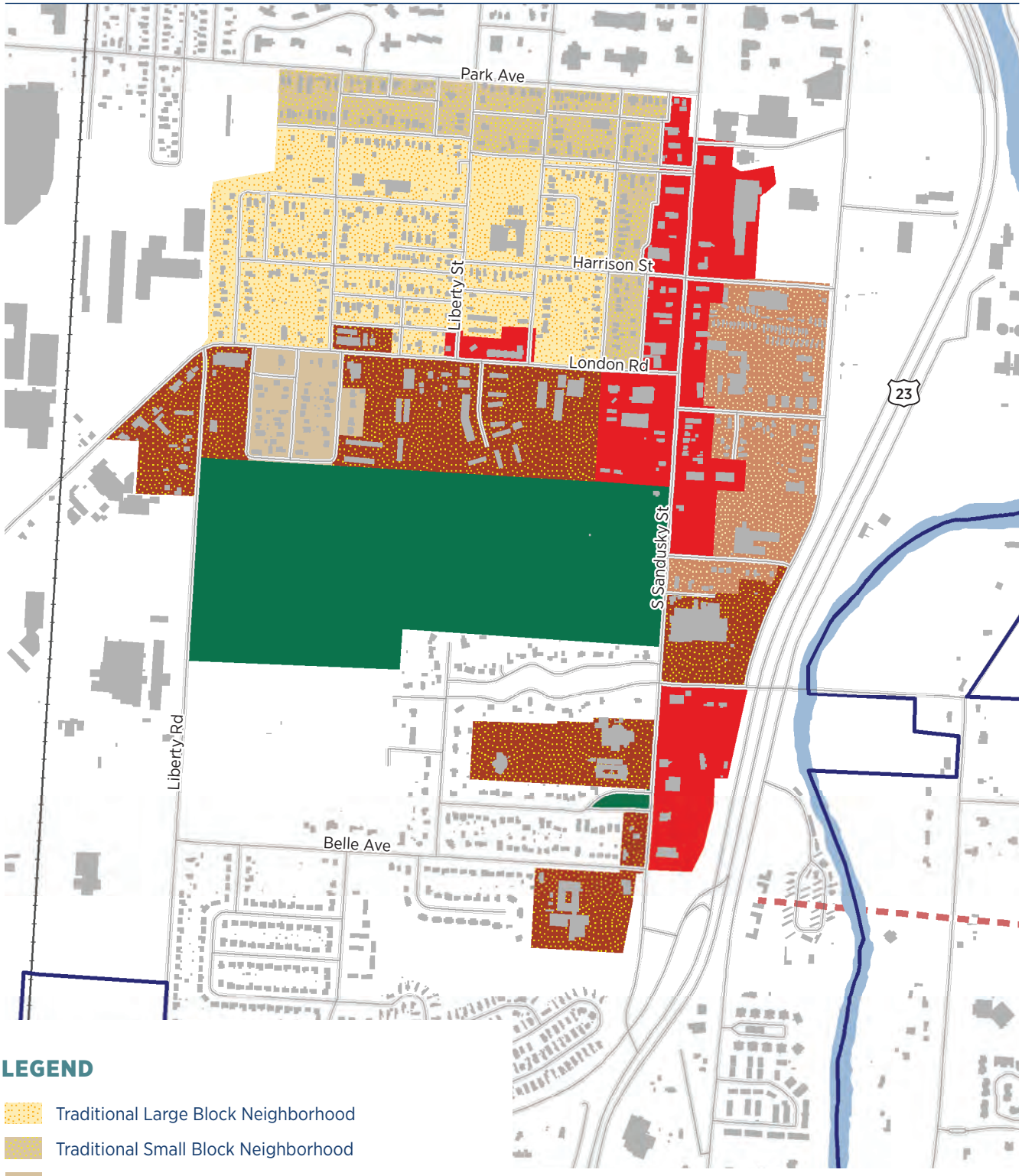
APPROPRIATE DEVELOPMENT TYPES

- Traditional Small Lot Single-Family
- Traditional Medium Lot Single-Family
- Traditional Small Block Neighborhood
- Traditional Large Block Neighborhood
- Traditional Activity District (Mixed Use)
- Commercial Corridor
- Neighborhood-Scale Activity Center
- Community-Scale Activity Center
- Regional-Scale Activity Center



Woodward Elementary School provides a civic anchor in the center of the neighborhood

SOUTH SANDUSKY STREET FOCUS AREA FUTURE CHARACTER MAP



LEGEND

- Traditional Large Block Neighborhood
- Traditional Small Block Neighborhood
- Traditional Small Lot-Single-Family
- Traditional Activity District (Mixed Use, Lower Intensity)
- Traditional Activity District (Mixed Use, Higher Intensity)
- Commercial Corridor (Neighborhood)
- Commercial Corridor (Community)
- Natural Conservation/Preserves
- City of Delaware
- Roadway
- Proposed Roadways
- Railway

↑ North

FAR EAST SIDE FOCUS AREA

This large area includes two distinct parts which have the opportunity to be integrated into a cohesive area over time. In the east-southeast portion of the Near East Side Gateway Focus area is an area that contains a mix of residential, commercial, industrial and open space bisected by US Route 36 and bounded by existing railroad tracks on all sides. The area provides opportunity for enhancements that would better knit the built fabric together and improve quality of place through public realm improvements (sidewalks, amenities, etc.). Farther to the north is a largely undeveloped area with both rural and agricultural landscape. It is mostly unincorporated and actively farmed, but offers long-term potential for limited residential growth and some economic development areas situated along planned major transportation corridors and at key planned transportation nodes. Preserving space for these planned transportation improvements is vital to achieving long term transportation goals. As there have been fewer investments in sewer, water, and road infrastructure in comparison to areas in the south, this area is not anticipated to be developed within the next ten years. (However, it is very important to consider how this area could develop in the longer term without sacrificing the current agricultural functions of the land or before annexation if possible.)



Major upgrades are planned for the Point in the Far East Side.

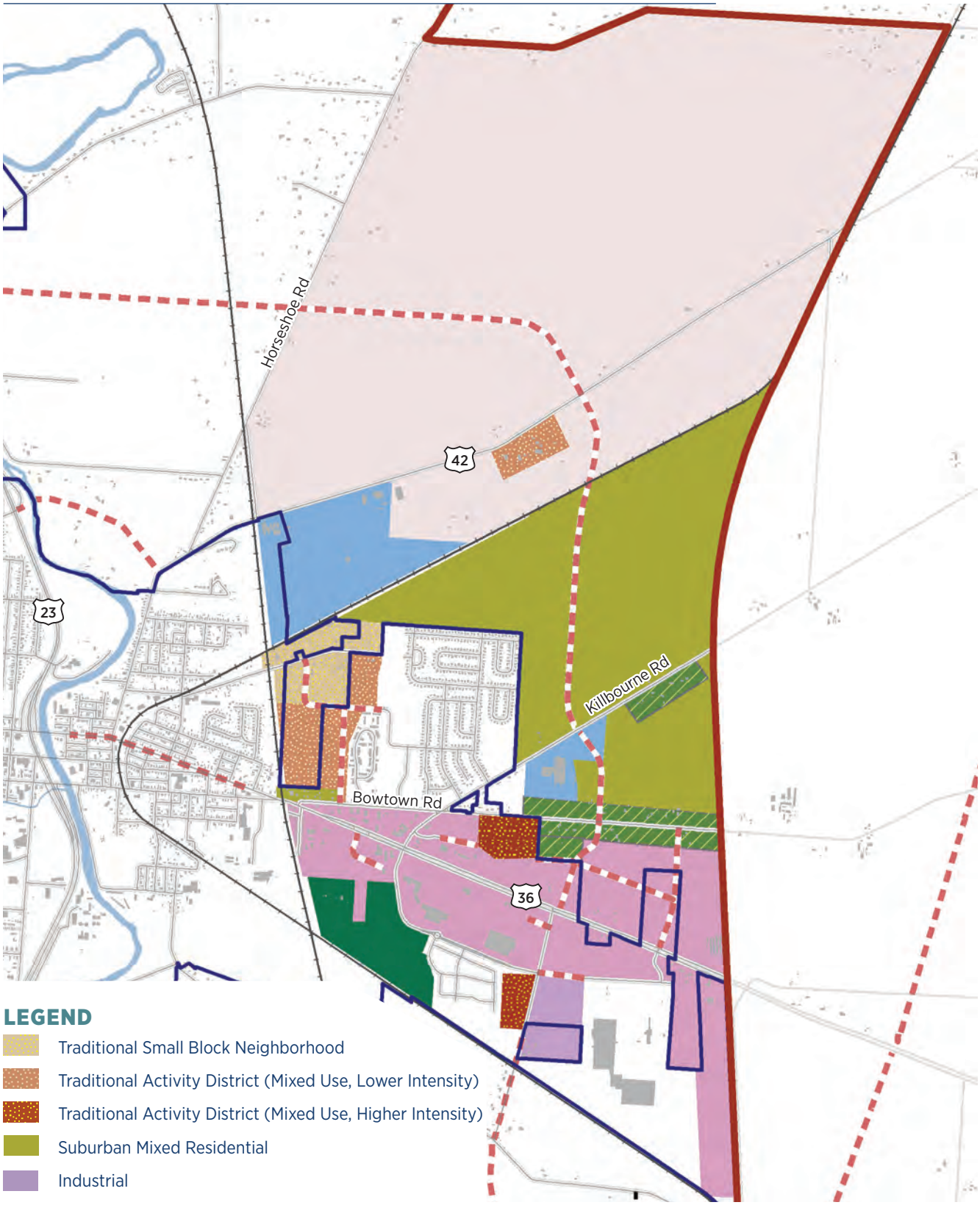
FAR EAST SIDE FOCUS AREA

GUIDANCE FOR AREA PLANNING

- Support the development of the emerging Delaware County Campus on the former Delaware Area Career Center site and surrounding area including the extension of Bixby Parkway (aka Glenn Road) through this area.
- Encourage single family development to the east of the existing Kensington Subdivision with intensification or potential varied residential use in proximity to planned transportation corridors.
- Focus mixed-use development along the US36/SR37/Sunbury Road corridor to create a vibrant, high-quality environment with supportive amenities and services for nearby residential areas.
- Create infrastructure connections and ensure cohesive development to help integrate the more undeveloped northeastern and more developed southwestern portions of the Focus Area.
- Consider future neighborhood activity centers to support the daily needs of residents of this area.
- In the east-southeast, allow for selected intensification of uses where appropriate, including mixed-use, multistory buildings.
- In the northern part of this Focus Area, maintain the existing rural and agricultural uses and reserve them for potential development in the long term.
- Ensure redevelopment and infill in this area does not overburden infrastructure (such as roads and utilities) and identify key locations for business enterprises that have infrastructure and access to regional networks.
- Create a master plan for transportation with relevant jurisdictions that will support potential future development with an interconnected street network with considerations for multimodal travel to reduce long-term transportation impacts on the City and region.
- Pursue agreements with neighboring jurisdictions to support shared, long term goals for the area, such as a Joint Economic Development District (JEDD, an arrangement through which the City can work with townships on a shared plan for development).
- Integrate preservation of open space and creation of parks for integration into design of new subdivisions and districts.
- Establish a unique and high-quality architectural character for infill, redevelopment and new development in this area.
- Integrate a variety of housing types to meet the future demands of the community.
- Allow for potential long-term evolution of industrial areas to include housing, commercial or other uses.

APPROPRIATE DEVELOPMENT TYPES

- Traditional Small Lot Single-Family
- Traditional Medium Lot Single-Family
- Traditional Small Block Neighborhood
- Traditional Activity District (Mixed Use)
- Suburban Mixed Residential
- Commercial Corridor
- Regional-Scale Activity Center
- Neighborhood-Scale Activity Center
- Community-Scale Activity Center
- Regional-Scale Activity Center
- Industrial (Corridor Industrial)
- Agriculture



LEGEND

- Traditional Small Block Neighborhood
- Traditional Activity District (Mixed Use, Lower Intensity)
- Traditional Activity District (Mixed Use, Higher Intensity)
- Suburban Mixed Residential
- Industrial
- Community-Scale Activity Center
- Government Campus
- Rural and Agricultural Reserve
- Rural Frontage
- Natural Conservation/Preserves
- City of Delaware
- Planning Area
- Roadway
- Proposed Roadways
- Railway

North

Delaware Together

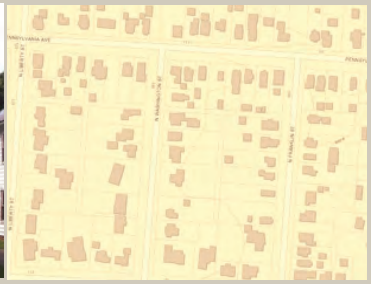
DEVELOPMENT TYPES

Development Types, patterns that can be found in Delaware, are identified in this section in order to present the palette that exists today. The Development Types confer density, character and land uses. They can be seen as the 'building blocks' that comprise neighborhoods. The Development Types can be found both in the existing eight Character Areas, which are anticipated to remain relatively stable over the next five to ten years, and the six Focus Areas where change in the existing development types is anticipated and desired.

TRADITIONAL TOWN / URBAN

TRADITIONAL SMALL LOT - SINGLE FAMILY





Intensity

- Lot size ranges significantly with gross density typically within the 8-12 dwelling units per acre range (most in 8-9 units per acre range)
- Future development should be generally consistent with broader neighborhood area and a wider range may be appropriate in some circumstances, including in new development areas.

Character

- Narrow façade homes sitting at average setbacks on small to medium sized blocks. On street parking is common.

Land Uses

- Single-Family Detached

TRADITIONAL MEDIUM LOT - SINGLE FAMILY





Intensity

- Lot size ranges significantly with gross density typically within the 5-8 dwelling units per acre range (most in 6-7 units per acre range)
- Future development should be generally consistent with broader neighborhood area and a wider range may be appropriate in some circumstances, including in new development areas.

Character

- Narrow or wide façade homes sitting at average setbacks on medium to large blocks. Often with detached garages.

Land Uses

- Single-Family Detached

TRADITIONAL SMALL BLOCK NEIGHBORHOOD





Intensity

- Small lots for small buildings / larger lots for larger buildings (allows for attached and detached homes)
- Blocks are usually smaller than 250 x 600 feet

Character

- A mix of residential types with two and three-story homes sitting at the sidewalk edge with small rear yards or alleys. On street parking common.

Land Uses

- Single-Family Detached, Attached, Two and Three-Family, Multi-Family Apartment

NEO-TRADITIONAL SMALL BLOCK NEIGHBORHOOD





Intensity

- Blocks are usually smaller than 250 x 600 feet
- Small lots for small buildings / larger lots for larger buildings (allows for attached and detached homes)

Character

- A mix of residential types with two and three-story homes sitting at the sidewalk edge with small rear yards or alleys. On Street parking common.

Land Uses

- Single-Family Detached, Attached, Two and Three-Family, Multi-family apartments

TRADITIONAL LARGE BLOCK NEIGHBORHOOD





Intensity

- Varies , but lot widths are consistent in a block. Larger blocks in these areas allow for deeper lots.

Character

- One to three-story buildings with wide sidewalks, deeper back yards, and on street parking. More front yard than in small block neighborhoods.

Land Uses

- Mix of small and medium-scale housing types

TRADITIONAL ACTIVITY DISTRICT (MIXED USE)





Intensity

- Varies based on context
- Block pattern similar to "Small Block Neighborhoods"

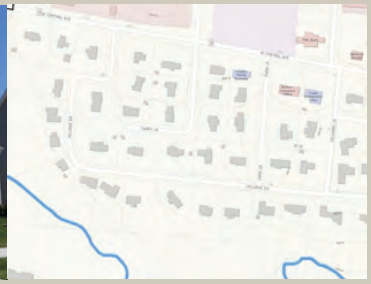
Character /Land Uses

- Compact districts with a mix of entertainment and service uses with residential in upper floors or at edges Multi-Family apartments
- Square blocks common

SUBURBAN NEIGHBORHOODS

EARLY SUBURBAN SINGLE-FAMILY





Intensity

- Small to medium lots that are usually deeper than in the Late Suburban neighborhoods

Character

- Wide and deep lots on curvilinear streets often still with a grid or inner connections
- One and two-story homes with deep front and rear yards
- Attached garages are common

Land Uses

- Single-Family Detached

LATE SUBURBAN SINGLE-FAMILY

Intensity

- Similar to Early Suburban, but homes are typically larger and cover more of the lot. Garages also use more lot area as they get larger.

Character

- High lot coverage with attached garages, small yard
- Tall two-story homes are common
- Sidewalks and shallower front yards are common
- Culs-de-sac are prevalent

Land Uses

- Single-Family Detached





MULTIFAMILY COMPLEX

Intensity

- Based on units per structure more than lot sizes. Could include up to 12-20 units in three- or four- story buildings are common or be smaller in scale.

Character

- Full block apartments or smaller townhouses and "flats" usually in concentrations of 60+ total units within a development

Land Uses

- Townhouses, Small and Large-Scale Multi-Family





SUBURBAN MIXED RESIDENTIAL

Intensity

- Varies by housing type in each segment (gross density can be calculated).

Character

- Can range, with a variety of housing types in one development often segregated into segments of like housing

Land Uses

- Single-Family Detached, Single-Family Attached, Multi-Family





SUBURBAN ACTIVITY & EMPLOYMENT DESTINATIONS

NEIGHBORHOOD-SCALE ACTIVITY CENTER





Intensity

- Three to ten thousand square feet of commercial space, maximum 3,000 square-foot buildings

Character

- Residential-style of neighborhood-compatible architecture that provides a local destination for an area of one mile or less. Generally, pedestrian-oriented with very limited parking.
- Usually located on a major road with no internal street network. May include mixed-use buildings or be adjacent to small apartments or townhouses.

Land Uses

- Retail, Office, Services, Restaurants, Recreation, Open Space, etc.

COMMUNITY-SCALE ACTIVITY CENTER





Intensity

- Up to 100 acres of land designed as a destination for daily needs. Buildings up to 40,000 square feet like small groceries may anchor these areas.

Character

- Neighborhood compatible architecture designed to capture many local car trips. Usually located every 3-5 miles within a community. Located at crossroads of major roadways.
- May have internal street network.

Land Uses

- Retail, Restaurants, Services, Entertainment, Recreation, Open Space, Community Centers, Places of Worship, Residential including Multi-family and other "Missing Middle" Housing, Other

REGIONAL-SCALE ACTIVITY CENTER





Intensity

- Up to 300 acres of land designed as a destination for special trips. Buildings in excess of 100,000 square feet are appropriate in these areas as well as supporting smaller buildings.

Character

- Large-scale architecture with an institutional and commercial character is dominant. Sites are designed to accommodate heavy automotive traffic and use garages and large surface parking lots.
- Typically ten or more miles between locations. (Usually only one or two of these destinations is in a community the size of Delaware.)
- Will have internal street networks

Land Uses

- Retail, Restaurants, Services, Entertainment, Recreation, Open Space, Community Centers, Places of Worship, Apartments, Town homes, Other

COMMERCIAL CORRIDOR





Intensity

- Varies based on location (three to 300 acres of commercial uses).

Character

- Commercial frontage (along the road) development often in shopping centers. Surface parking is located between the street and buildings. Screening walls or landscaped berms are used between these areas and adjacent neighborhoods.
- Can vary in scale (neighborhood, community, regional).

Land Uses

- Retail, Office, Services, Restaurants, Recreation, Other

BUSINESS CAMPUS ACTIVITY CENTER

Intensity

- .15 to .35 Floor Area Ratio (FAR) average (6,500 square feet to 15,250 square feet per acre).

Character

- Large lot subdivision with infrastructure and lot sizes designed to accommodate flex buildings with large footprints in excess of 100,000 square feet.
- Roads are designed for easy access and weight of freight and heavy truck traffic.

Land Uses

- Manufacturing, Warehousing, Research & Development. Distribution, Office, Services, Wholesale, Sales, Transportation, Utilities, Mining, Other



DEFINITION: FLOOR AREA RATIO (FAR)

The ratio of a building's total floor area (gross floor area) to the size of the property on which it is built. It is one way of measuring density.

INDUSTRIAL (CORRIDOR INDUSTRIAL)

Intensity

- .15 to .35 Floor Area Ratio (FAR) average (6,500 square feet to 15,250 square feet per acre).

Character

- Large lots designed to accommodate a single building or use in excess of 100,000 square feet.
- No internal road network. Access is from primary road.

Land Uses

- Manufacturing, warehousing, distribution, office, services, wholesale, sales, transportation, utilities, mining, etc.



SPECIAL DISTRICTS AND MASTER PLANNED CAMPUSES

UNIVERSITY CAMPUS

- Several blocks or large edge sites dedicated to the buildings and landscape associated with a university of educational function. The internal uses, configuration and maintenance are regulated by the university's master plan, and not impacted by the City's zoning or development regulations.
- The Ohio Wesleyan Campus is an example of an existing University Campus.





GOVERNMENT CAMPUS

- Sites that include several blocks dedicated to buildings with a government function, normally also consisting of open space and/or parking to support the use.





HOSPITAL/MEDICAL CAMPUS

- Large sites at the edge of the City along major corridors dedicated to multiple buildings for the provision of health care.





FAIRGROUNDS

- Several blocks dedicated to the provision of open spaces and large buildings to accommodate horse racing, fairs, events, trade shows, in a mix of outdoor and indoor spaces.





CAMPS OR ECOLOGICAL CONSERVATION CAMPUS

- There are several unique uses at the southern end of the City that utilize the natural landscape to provide educational and recreational opportunities at camps.
- Internal streets may be present and follow the natural topography of the sites.
- Development in these areas is minimal and buildings typically blend in with the surroundings to allow the use of outdoor recreation and natural resources.





ECO-VILLAGE

- A designed community that enables people to live in a way that minimally impacts the environment.







The Enright Ridge Urban Eco-village is a cooperative, farm project on the edge of East Price Hill neighborhood in Cincinnati, Ohio. It is an intentional community leading urban revitalization and sustainability. Members of the community strive to use less energy and use transportation in efficient ways. Residents grow food on community plots.

RURAL/AGRICULTURAL

RURAL SUBDIVISION

Intensity

- Homes typically sit on one to five-acre (or sometimes larger) lots.

Character

- Medium to large single-family detached homes sit on large lots. Homes are accessed by a public or private street(s) created to provide access to individual lots. No curb and gutter are used.

Land Uses

- Single-Family Detached, Accessory Dwelling Units (ADUs) Agriculture





DEFINITION: ACCESSORY DWELLING UNIT

A smaller, independent residential dwelling unit located on the same lot as a stand-alone residence.

RURAL FRONTAGE (LEGACY TOWNSHIP DEVELOPMENT)

Intensity

- Homes typically sit on one to five-acre (sometimes larger) lots.

Character

- Medium to large single-family detached homes sit on large lots that may be irregularly sized. Farm land and fields are found to the rear or interior of the country block. Sometimes subdivisions are developed behind these homes. Homes have direct access to the primary county road.

Land Uses

- Single-Family Detached, ADUs, Agriculture





AGRICULTURE

Density

- Usually parcels in excess of 10 acres

Character

- Typically large parcels used for agriculture with limited structures however, some properties may have homes, barns or other accessory structures.

Land Uses

- Single-Family Detached, ADUs, Agriculture





Chapter 6
Fiscal Sustainability



6. FISCAL SUSTAINABILITY

This section outlines the City's ability to fiscally sustain the long-term objectives set forth under the comprehensive plan and is a critical component of the plan.

UNDERSTANDING FISCAL HEALTH

The City of Delaware has long used smart growth fiscal management techniques as well as traditional funding sources such as income tax to pay for services, amenities and infrastructure. Delaware historically has had one of the lowest income tax rates for comparable cities in the region–today that rate stands at 1.85%. Having the resources to meet citizen demands has long been a struggle for the City. In recent years, a proposed income tax increase to help support roadway maintenance and needed new sections of roadways was defeated by voters. Thus, the City will have to face the difficult decision in the future to either not provide the same level of quality services, amenities, and infrastructure or cut back on their provision, including potentially not being able to keep up with the expansion and growth of the community. At the same time, the City anticipates utilizing smart growth fiscal management techniques, seeking out grant and alternate funding from other sources, partnering with the private sector—particularly on infrastructure improvements as well as on businesses, jobs, and industry opportunities—to help augment the tax base. In 2016, the City sought an income tax increase to help fund road construction and maintenance. This was not approved by voters. The City has received feedback to better define what an increase would be used to fund and anticipates returning to the ballot within the implementation timeframe of the Comprehensive Plan.

PAYING FOR GROWTH

The City uses the following to help growth better pay for itself: Impact Fees, Tax Increment Financing (TIF), Joint Economic Development Districts (JEDD), and New Community Authorities (NCA). Several of these are discussed in the Chapter in more detail as well as throughout the Comprehensive Plan.

Impact Fees. Impact fees are one-time payments used to construct system improvements needed to accommodate development. Impact fees must be proportionate and reasonably related to the capital facility service demands of new development. Established in 2001 for Fire/EMS, Parks, and Police, the one-time fees and the underlying analysis were updated in 2005, resulting in a fourth fee category being added: Municipal. These fees have been utilized for capital needs impacted by growth such as adding community parks, fire stations, new vehicles, etc. In 2018, the City commissioned another update, which is currently in draft form. As part of that update, the City has also contemplated, but has not imposed at this time, a Transportation Impact Fee.

Tax Increment Financing. Tax Increment Financing, a reallocation of taxes, has been used to accommodate financing typically for capital infrastructure. This has been used by the City, the private sector, and in partnership between both depending upon the need, area, or project. These have a defined expiration date as defined within each ordinance establishing the TIF.

There are currently several district and project based TIF's being utilized for varying purposes including:

- Braumiller, Cheshire North, Cheshire South, Cheshire West and Evans Residential Districts. Used to fund infrastructure improvements in the area including Glenn Parkway.
- Airport Jet Stream and Airspace. Used to fund improvement of intersection, utilities, and ramps
- Southeast Commercial – Commercial District. Used to fund infrastructure improvements within the southeast area along US23. (No properties have been developed to date in this area and no TIF revenues have been received nor spent.)
- Skyclimber and V&P Hydraulics – Industrial Development. Used to fund costs for acquiring V&P and Skyclimber parcels
- Zaremba–Mill Run Crossing – Commercial Development. Used to fund costs related to Glenn Parkway and Mill Run Crossing in the vicinity of Glennwood Commons Shopping Center.
- Sawmill Parkway – Roadway Extension. To be used to fund costs related to the construction of the extension of Sawmill Parkway through the City.
- Seattle House – Residential Development. To be used to fund costs related to the Point railroad/ roadway improvement project.
- Buehler's – Commercial Development. To be used to fund costs related to Central Avenue roadway and turn lane improvements.

JEDD. Beginning in 2014, the City and Berkshire Township (the site of the Tanger Outlet Mall among other developments) entered into a Joint Economic Development District Agreement. This allows the imposition of the City's income tax in this area (that is not within the City) for the purpose of facilitating economic development including job creation and retention. This essentially allows the City to account for the impacts of such a large regional development upon the City, principally traffic in this case.

NCA. New Community Authorities have been utilized since about 2007 in the City to help fund various improvements including Glenn Parkway. There are also NCAs more oriented toward private development enhancements. Typically, these involve a millage charge imposed against the property value in a defined area to help fund specified costs. These have an expiration date as defined within each ordinance establishing the NCA, which can be as long as 30 years. The City currently has three NCAs:

- Delaware South NCA. Area around Glenn Parkway in the far southeast area. Proceeds to be used to fund costs related to the construction of Glenn Parkway.
- Delaware North NCA. Area around Glenn Parkway in the area around US36/SR37 and Glenn Parkway. Proceeds to be used to fund costs related to the construction and enhancement of Glenn Parkway.
- Terra Alta NCA. A developer-driven NCA encompassing the large Terra Alta development.

THE RELATIONSHIP BETWEEN LAND USE AND FISCAL HEALTH

The City of Delaware is composed of numerous land use types and will certainly continue to be in the future even as the market changes patterns of land use. The City has been fiscally resilient and remains in good overall fiscal health. There is every reason to believe that it will continue to maintain good fiscal health moving forward while implementing this plan and continuing to utilize the growth management tools it has been using.

This plan focuses growth and development in key areas including infill, redevelopment, and new development, all within the context of a dynamic region. The plan is fiscally sustainable in that growth in the planning period is contemplated only within the historic City utility boundary. Allowing for a broader range of uses and even changing some uses in areas once slated for essentially single-use typologies serves to broaden the fiscal sustainability of the community in the long term while being responsive to the changing marketplace, providing business opportunities and providing housing opportunities in a wide range and area.

Implementing the smart growth-oriented and mixed-use components of this plan in key areas can generate significantly more tax revenue per acre. At the same time, this approach will utilize existing and even new infrastructure more efficiently over time and create the sense of place and, in some cases, more compact and walkable environments citizens have said they desire. This can also help the City deliver ongoing services in a more efficient manner to the same number of people and businesses if development is more compact than if it is more spread out.

However, there will always be a diversity of people, uses, and development types within the community. The current fiscal health of the community demonstrates that there is fiscal strength in land use diversity. Coordinating land use decisions and service provision within a larger context rather than singular project specific analysis alone will ultimately place the community in the strongest fiscal position. At the same time, this approach will help in implementing the many (and varied) goals and objectives contained within this plan.

FACTORS INFLUENCING THE FISCAL SUSTAINABILITY OF LAND USES

Numerous factors influence the fiscal results for different land uses. These factors include, but are not limited to:

- Local revenue structure,
- Services provided,
- Local levels of service,
- Capacity of existing infrastructure, and
- Demographic and market characteristics of new growth.

LOCAL REVENUE STRUCTURE

A key determinant in calculating net fiscal results from new development is the local revenue structure, which affects fiscal findings through both its composition and revenue distribution/collection formulas. Every community has at least one major revenue source, and, in some cases, several on which it is reliant. Examples include property tax, local sales tax, and state shared revenues.

An important component of revenue structure is the distribution/collection formulas for various sources. With the exception of property tax, the distribution/collection formulas for common revenue sources can vary greatly from state to state. For example, in states where sales tax is collected, communities can assess a local option sales tax, which is usually collected on a situs-basis (point of sale basis). Other states collect sales tax at the state level and distribute the revenue to communities using a population-based formula. A similar situation exists with income tax, where some states allow a local income, or "piggyback" tax on top of the state income tax. In certain states, such as Maryland, this tax is collected by place of residence. In others, such as Ohio, it is collected by place of employment.

SERVICES PROVIDED

Another important factor in the fiscal equation is the services provided by the jurisdiction. Jurisdictions provide different services and the fiscal impact analysis will reflect this—and stakeholders and the audience for the study will need to understand this. For example, in many states, school districts are separate entities with their own tax rates (e.g., Florida, Ohio). In other states, schools get their local funds from County General Fund taxes (e.g., Virginia). Fiscal analyses will obviously reflect the services provided and funding streams, and audiences need to be aware of this to prevent both unintentional and deliberate confusion.

LEVELS OF SERVICE

Another factor in fiscal impact analysis is an understanding of the levels of service currently being provided in a community. Existing levels of service are defined as the facility or service standard currently being funded through the budget. Examples of level of service standards are fire/EMS response times, road miles paved annually, parkland per capita, etc. This is an important factor since levels of service generally vary from community to community.

CAPACITY OF EXISTING INFRASTRUCTURE

The capacity of existing infrastructure in a community also has a bearing on the fiscal sustainability of new development. For example, a community may have the capacity to absorb a large number of additional vehicle trips on its existing road network or may be significantly under capacity with regards to high school enrollment. In either of these situations, the community could use a case study-marginal cost approach that accounts for existing facilities and levels of usage to assess fiscal impacts. A community with excess capacity could absorb substantially higher growth over time without making additional infrastructure investments than a community without these capacities. This excess capacity results in lower capital costs over time. This is an important factor in the fiscal equation, since the largest cost associated with capital facilities are the annual operating costs, which typically account for approximately 80 percent of a community's budget.

DEMOGRAPHIC AND MARKET CHARACTERISTICS OF NEW GROWTH

Next to a community's revenue structure, no other factor has as great an impact on the net fiscal results as the demographic and market characteristics of different land uses. Examples of demographic and market variables for residential development include average household sizes, pupil generation rates, market value of housing units, trip generation rates, density per acre, and average household income. Important demographic and market characteristics for nonresidential development include square feet per employee, trip generation rates, market values per square foot, sales per square foot (retail), and floor area ratio.



EXISTING FINANCIAL CONDITION

The balance of revenue to expenditures is a complex process, the details of which are best reviewed in either the City's annual budget or Comprehensive Annual Financial Report (CAFR). The budget process for the City is generally a balanced process from year to year. However, some expenditures and investments in infrastructure can occur over several years. The framework established to distribute these revenues towards the various costs to serve development consists of several Funds. These Funds include: the General Fund, Special Revenue Funds, Capital Projects Funds, Debt Service Funds, and Enterprise Funds.

The City has several funds/revenue sources in place to contribute to and address the cost of development.

Following is a description of some of the revenue sources the City has established to fund infrastructure. Impact Fees, NCAs, JEDDs, and TIFs have been detailed previously on pages 92 and 93.

Enterprise Funds. These are funds where user fees are set to recover the cost of providing services and facilities such as water distribution and wastewater collection to the City's utility customer base. These revenues are used to cover operating and some capital items such as debt service. The City augments these revenues with impact fees, designed to recoup new growth's share of needed infrastructure.

Capital Improvement Funds. Other funding for improvements includes pay-as-you-go funding out of current revenues for lower cost improvements. Grants are used to bridge funding gaps and leverage additional funds. Bonds also provide a way to finance large scale projects with long life cycles. The City transfers bond sale proceeds to Debt Service Funds that account for principal and interest payments on major, debt-financed infrastructure projects such as roadway construction.

GENERAL FUND

The General Fund is the City's primary operating fund. It accounts for the majority of the financial activity of the City including all its departments, which are listed in the budget expense charts.

GENERAL FUND REVENUE BY SOURCE—3 YEAR COMPARISON

According to the City of Delaware's 2019 Popular Annual Financial Report, over 77% of the City's General Fund revenue is derived from income tax (70%) and property and other local taxes (7%). Eight percent (8%) of City revenue resulted from a variety of license, fees and permits, including building permits, engineering fees, liquor permits and franchise fees. Intergovernmental revenue was primarily from homestead and rollback reimbursements from the State of Ohio, and local government fund distributions.

GENERAL FUND REVENUE BY SOURCE—3 YEAR COMPARISON

Also according to the City of Delaware's 2019 Popular Annual Financial Report, the General Fund is the main operating fund of the City and pays a significant amount of the personnel costs of City employees, as well as the day-to-day operating expenditures. Public safety is the largest category of expenditures, which includes the City's Police Department. The City accounts for Fire/EMS expenditures in a separate special revenue fund, because there is a voted income tax to support these costs. The General Government is the other significant expenditure category. These expenses include: City Council, the City Manager's Office, Administrative Services, Finance, Planning and Community Development, and Municipal Building and Ground Maintenance.

GENERAL FUND REVENUES (IN THOUSANDS)

	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
Income taxes	$14,827	$14,558	$13,550	$13,151	$12,036	$11,349	$10,845	$10,718	$10,136	$9,835
Property and other local	$1,485	$1,423	$1,260	$1,310	$1,251	$1,200	$1,265	$1,252	$1,340	$1,410
Charges for services	$879	$1,656	$2,153	$1,449	$763	$912	$610	$731	$596	$977
Licenses permits and fees	$1,761	$1,590	$1,133	$1,268	$1,026	$932	$886	$805	$711	$708
Fines and forfeitures	$108	$155	$140	$140	$142	$92	$77	$74	$57	$61
Intergovernmental	$936	$490	$881	$826	$875	$912	$1,246	$1,385	$1,857	$2,554
Special assessments	$44	$13	$14	$13	$0	$0	$0	$0	$0	$0
Investment Income	$942	$797	$388	$144	$46	$156	$77	$15	$31	$18
Reimbursements	$116	$135	$79	$90	$160	$50	$180	$39	$73	$299
Other	$122	$207	$67	$90	$107	$1,296	$272	$163	$170	$91
TOTAL	$21,219	$21,023	$19,662	$18,481	$16,406	$16,899	$15,458	$15,182	$14,971	$15,953

Source: City of Delaware

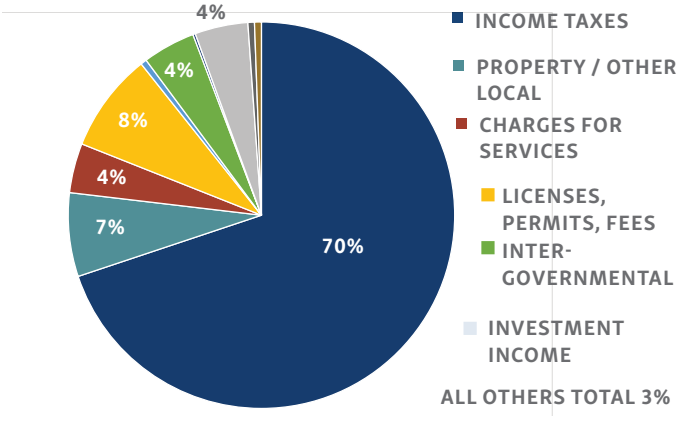
GENERAL FUND EXPENSES (IN THOUSANDS)

	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
General Government	$5,714	$6,157	$6,403	$5,528	$5,053	$4,545	$4,727	$4,214	$3,893	$3,838
Public Safety	$9,262	$9,132	$8,047	$7,571	$7,248	$7,082	$6,783	$6,827	$6,827	$7,893
TOTAL	$15,345*	$15,289	$14,450	$13,099	$12,301	$11,627	$11,510	$11,041	$10,720	$11,731

* Includes $369 other

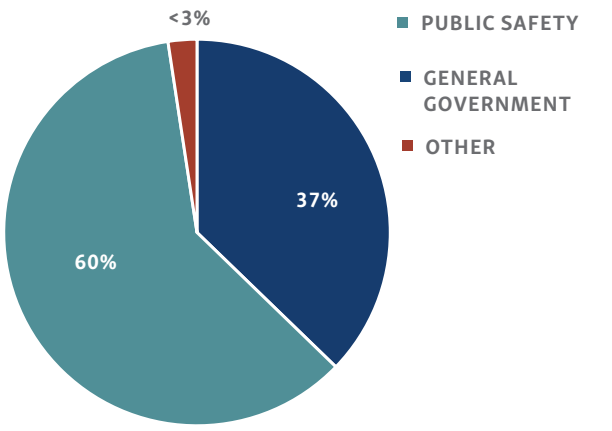
Source: City of Delaware

GENERAL FUND REVENUES 2019 (ROUNDED TO NEAREST 1%)



Source: City of Delaware Popular Annual Financial Report, 2019

GENERAL FUND EXPENSES 2019 (ROUNDED TO NEAREST 1%)



Source: City of Delaware Popular Annual Financial Report, 2019

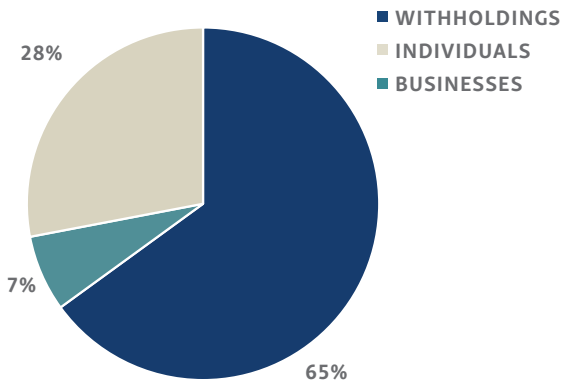
REVENUES

Like all Ohio cities, the City of Delaware's main source of discretionary funding is its local income tax. The discretionary portion of the income tax is accounted for in the General Fund. It is used to pay the majority of administrative salaries, as well as for many capital projects in the City. Other portions are used to fund the City's fire department operations and recreation improvements, which are accounted for in Special Revenue Funds.

INCOME TAX

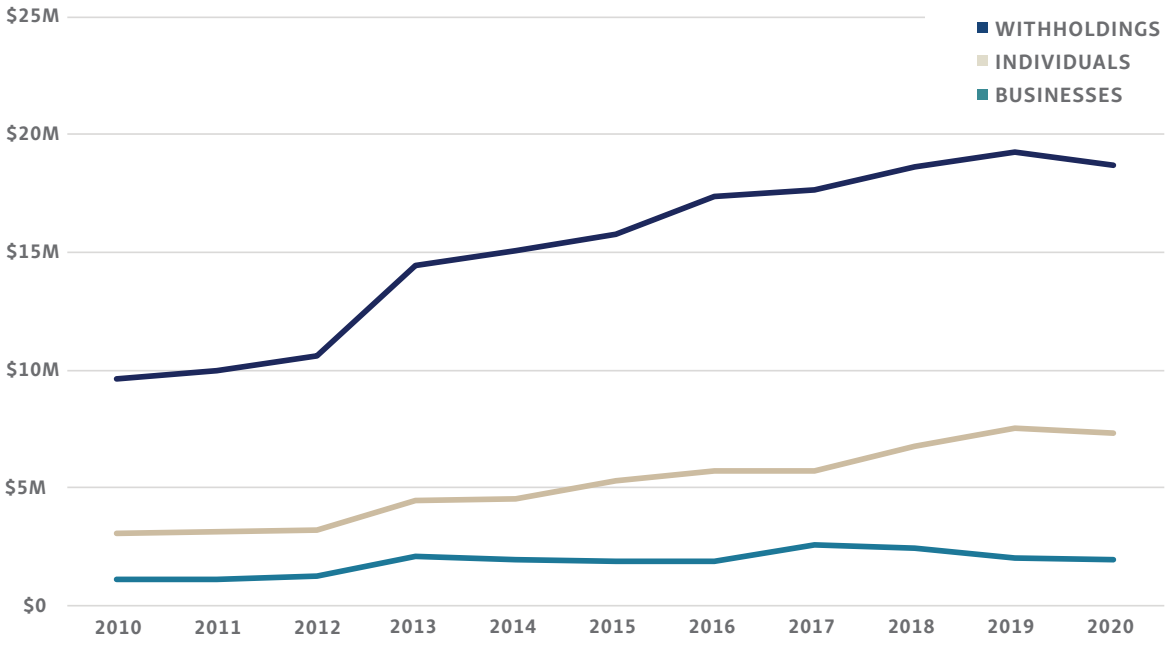
Income tax represents the largest source of revenue for the City. The City's current income tax rate is 1.85%. Of this percentage, 1% is for general operations, 0.7% is for fire/EMS and .15% is for parks and recreation. Approximately 65% of income tax comes from withholdings, followed by individuals (28%) and businesses (7%).

INCOME TAX SELECTIONS BY SOURCE



Source: U.S. Census, American Communities Survey 2018

INCOME TAX COLLECTIONS



Source: City of Delaware

SOURCE OF INCOME TAX REVENUE (IN THOUSANDS)

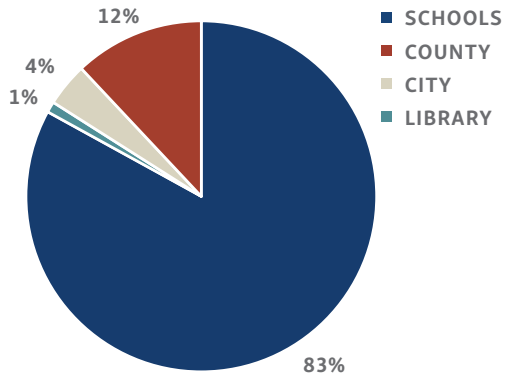
	WITHHOLDING	%	RESIDENTIAL	%	BUSINESS	%	TOTAL
2019	$20,339	65.61%	$8,505	27.44%	$2,156	6.95%	$31,000
2018	$18,775	73.23%	$4,995	19.48%	$1,867	7.28%	$25,637
2017	$18,719	73.27%	$4,805	18.81%	$2,025	7.93%	$25,549
2016	$16,797	69.58%	$5,538	22.94%	$1,807	7.48%	$24,142
2015	$15,610	68.86%	$5,219	23.02%	$1,840	8.12%	$22,669
2014	$15,161	70.08%	$4,534	20.96%	$1,940	8.97%	$21,635
2013	$14,126	69.36%	$4,250	20.87%	$1,989	9.77%	$20,365
2012	$13,467	71.19%	$3,933	20.79%	$1,516	8.01%	$18,916
2011	$13,322	72.26%	$3,775	20.48%	$1,338	7.26%	$18,435
2010	$10,864	69.85%	$3,425	22.02%	$1,264	8.13%	$15,553

Source: City of Delaware

PROPERTY TAX DISTRIBUTION

The City of Delaware also assesses a property tax. However, the vast majority of property taxes (96%) paid by City residents goes to the County, School District, and various County agencies and special districts. The City of Delaware only receives about 4% of property taxes collected. The City's property tax is allocated to the General Fund, as well as a dedicated amount to police and fire pensions.

PROPERTY TAX DISTRIBUTION



Source: U.S. Census, American Communities Survey 2018

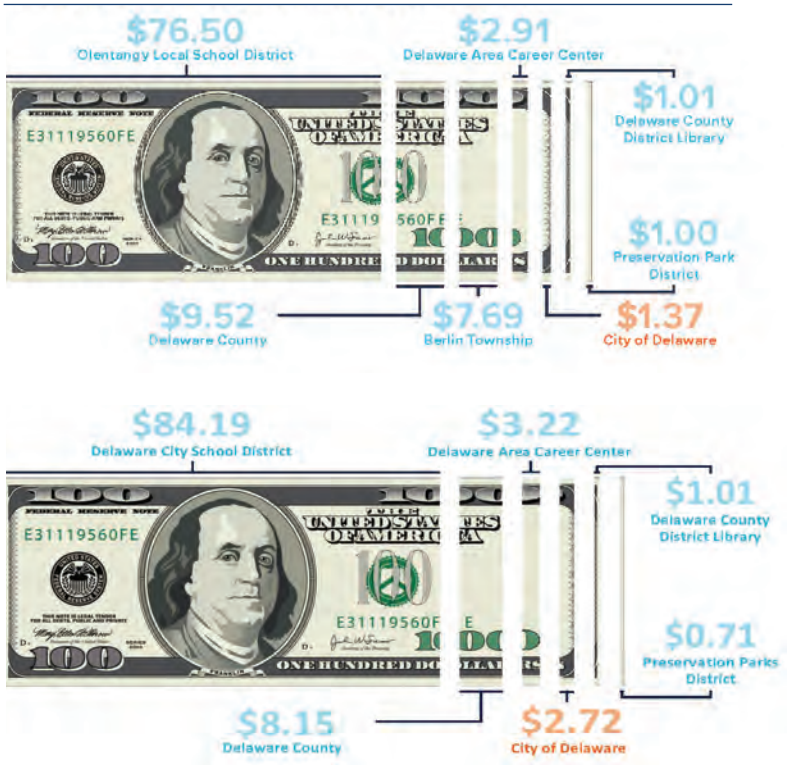
ANNUAL TAX IMPACT OF A $200K HOME IN DELAWARE

Olentangy Local School District	$3,596.37
Delaware County	$447.37
Delaware Area Career Center	$136.65
City of Delaware	$64.31
Berlin Township	$361.43
Delaware County District Library	$47.80
Preservation Park District	$47.39
TOTAL	$4.701.32

Delaware City School District	$3,457.24
Delaware County	$484.96
Delaware Area Career Center	$138.26
City of Delaware	$165.38
Delaware County District Library	$53.11
Preservation Parks District	$52.76
TOTAL	$4,351.71

Source: City of Delaware Popular Annual Financial Report, 2019

HOW $100 OF PROPERTY TAX IS ALLOCATED

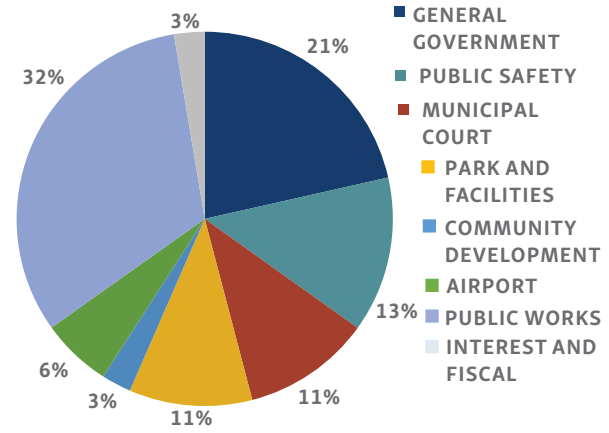


Source: City of Delaware Popular Annual Financial Report, 2019

OTHER SOURCES

The City also receives revenue from engineering fees, water capacity fees, sewer capacity fees, building permits, and growth management fees (park impact, police/fire, transportation municipal). While these fees currently keep the City budget balanced, they need to be continually assessed as expenses change over time due to growth and other factors.

TOTAL EXPENSES 2019 (ROUNDED TO NEAREST 1%)



Source: City of Delaware Popular Annual Financial Report, 2019

EXPENDITURES

The City provides a range of services to residents and workers including police and fire safety services, public works facilities development and maintenance, water treatment and distributions, storm water and sanitary sewer maintenance, solid waste collection, parks and recreation maintenance, and community development services. It should be noted that the City is not responsible for funding school costs.

Almost $27 million in 2019 was budgeted for capital investments necessary to accommodate growth and to provide a consistent level of service to residential and nonresidential development. These expenditures are accounted for in the Capital Improvement Funds and reflect programming for investments in general government, public safety, streets, water, parks and recreation, and airport infrastructure and equipment. Funding for improvements includes pay-as-you-go funding out of current revenues for lower cost improvements. Grants will be used to bridge funding gaps and leverage additional funds. Bonds provide an inexpensive way to finance large-scale projects.



TOTAL EXPENSES BY DEPARTMENT/FUNCTION (LAST TEN YEARS IN THOUSANDS)

	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010
General Government	$8,017	$8,484	$6,708	$5,525	$5,143	$4,861	$5,381	$4,746	$4,825	$4,710
Public Safety	$5,024	$23,576	$18,710	$19,992	$15,552	$14,273	$15,142	$12,794	$11,745	$1,262
Municipal Court	$4,124	$3,282	$3,121	$3,856	$3,681	$3,400	$2,841	$2,785	$3,006	$3,117
Park and Facilities	$3,958	$3,283	$3,557	$3,054	$3,208	$2,539	$2,742	$1,849	$5,156	$1,811
Community Development	$955	$676	$1,168	$1,364	$744	$1,907	$1,383	$674	$706	$291
Airport	$2,268	$2,148	$1,620	$1,268	$1,116	$1,453	$1,774	$1,322	$1,187	$1,134
Public Works	$12,049	$2,603	$5,821	$5,035	$3,976	$5,959	$5,210	$10,348	$6,553	$3,876
Other	$5	—	—	—	—	—	—	—	—	—
Interest and Fiscal Charges	$975	$1,074	$1,056	$1,178	$1,273	$1,237	$1,332	$1,636	$1,370	$1,389
TOTAL	**$37,376**	**$45,126**	**$41,761**	**$41,272**	**$34,693**	**$35,629**	**$35,805**	**$36,154**	**$34,548**	**$28,490**

Source: City of Delaware

STRATEGIES TO IMPROVE AND MAINTAIN FISCAL SUSTAINABILITY

The City currently enjoys a strong fiscal position as a result of local and regional economic growth and the implementation of thoughtful fiscal and land use policies. The Comprehensive Plan has identified strategies that maximize the benefits of projected growth by balancing fiscal priorities with quality of life improvements. The planning process reveals a tolerance for densification through infill development as well as a desire to see the targeted redevelopment of areas that are considered blighted or otherwise underutilized.

INFILL

The Comprehensive Plan identifies a community desire to encourage infill development to slow outward growth, to create vibrancy in commercial districts, and to stabilize districts. Typically, infill development takes advantage of already existing public infrastructure like streets, water, and utilities with the capacity to absorb the growth in a vacant or underutilized property. By encouraging investments to be made within developed areas the property values of the surrounding neighborhood may benefit. Increased property values is a net gain for Delaware; however, because property tax is not a large revenue stream for the City, the purpose of infill is more to encourage vibrancy and create demand for additional commercial/office/service sector land uses that generate employment and thus income tax revenue.

Tools such as Tax Increment Financing (TIFs) and Community Redevelopment Areas (CRAs) can fund some public infrastructure in infill areas (although it is understood that parcel TIFs are currently in favor with the State). The City of Delaware has experience using both TIFs and CRAs to support the redevelopment of blighted or underutilized areas. Land acquisition and property aggregation are also tools that can be utilized to facilitate development and better equalize development and new construction costs.

REDEVELOPMENT

Redevelopment of areas that are not currently utilized for residential, industrial, or agricultural purposes provides the City with an opportunity to expand its tax base and accommodate growth through the provision of additional housing or services. The comprehensive planning process has identified over 591 acres for infill and redevelopment. Compared to infill, redevelopment can require more significant up front capital investment, depending on the extent to which the area was already served by public infrastructure. As with infill development, tools such as TIFs and CRAs can be used. Land acquisition and property aggregation are additional tools that can be utilized to help facilitate development and better equalize development costs to those of new construction areas.

NEW DEVELOPMENT

Focus areas have been identified in the plan for significant new development, including the Southeast, Southwest and Far East Side. These areas have been identified to help encourage development in locations that support the goals and objectives of this plan in a way that is fiscally responsible. By delineating these areas as most suitable for new development, resources and attention can be focused on them. While each of the three areas is unique regarding the specific mix of uses that is most appropriate and desirable, similar financial tools could be appropriate for all three in order to promote fiscal sustainability, including TIFs and New Community Authorities (NCAs) to encourage and support beneficial projects.

FISCAL IMPACT OF DEVELOPMENT TYPES

The Comprehensive Plan identifies development types that currently exist in the City of Delaware. These development types serve as the building blocks for the Character and Land Use Plan and recommendations. Traditional Town/Urban development types tend to reflect higher density, more pedestrian-friendly land uses than Suburban development types, which reflect low-density, auto-oriented land uses. The City is and will continue to be composed of both types.

Given the revenue structure and capital demands of land uses in the City, the best means to maintain fiscal sustainability is to diversify and intensify the land uses where appropriate with an emphasis on nonresidential uses where appropriate. Because the City relies heavily on income tax from workers who are employed within the municipality, it is fiscally beneficial to prioritize mixed-use and nonresidential land uses and to target high-income industries, in particular, from a fiscal impact perspective. However, the fiscal impacts need to be balanced with other equally important community goals, objectives, and policies that may not produce net fiscal benefits when viewed on their own or in the short term.

However, as shown in the table on the following page, no single land use provides strictly positive fiscal results. The City collects property tax and income tax from nonresidential establishments, but per the Institute of Transportation Engineers (ITE) nonresidential development tends to generate more vehicle trips, stressing the street infrastructure, and typically has higher rates of public safety calls compared to residential uses.

Suburban residential development types (low density) typically generate higher property tax revenues with potentially higher income earning households and individuals from an income tax perspective, but often require extension and maintenance of streets, water, and utilities out to greater distances than Traditional Town / Urban (higher density clustered development). According to the Institute of Transportation Engineers (ITE) sprawling development generates more vehicle trips per housing unit than a unit in a multi-unit structure. Additionally, on average single residential units in Delaware have more persons per household than units in multi-unit structures, which generates more vehicle trips, and demands for public safety, and parkland capital investments.

Industrial employment is assumed to pay higher wages and salaries than retail per nationwide averages and given regional trends for the industrial employment sector discussed in Chapter 3. Office employment tends to generate higher income than retail jobs. Of the nonresidential development prototypes, only Suburban Neighborhood Scale Activity Center includes office land uses, which contributes to its positive net fiscal benefit.

RELATIONSHIP OF FISCAL AND NON-FISCAL BENEFITS

It is important to acknowledge that fiscal impacts should not be the only consideration in determining which development types are appropriate. A range of other factors must be considered. This Comprehensive Plan sets forth numerous goals and objectives that should be taken into consideration. While it is essential that fiscal impacts are well-understood and are a part of the decision-making process, ultimately this plan advocates for a variety of uses depending on the context in order to influence quality of life. On the following two pages are examples of other factors that may be taken into consideration relative to development types.

Role of Annexation

The annexation of developable land has also been identified as a potentially fiscally beneficial growth management strategy, although the cost of expanding infrastructure and services must be carefully considered. Moreover, the Comprehensive Plan recommends annexation within existing utility boundaries and within Focus Areas within the next ten years but does not recommend indiscriminate or unfocused annexations in order to prioritize Focus Areas and City resources during the planning period. Both growing from within and by annexation will be important tools used within the policy framework outlined in this plan moving forward for the City. The fiscal sustainability of annexation will depend on the development plan for the annexation area.

HIERARCHY OF HIGHER DENSITY DEVELOPMENT PROTOTYPES AND FISCAL BENEFITS

TRADITIONAL TOWN / URBAN	TAX REVENUE				
DEVELOPMENT TYPE	PROPERTY	INCOME	DEMAND FOR SERVICES	DEMAND FOR INFRASTRUCTURES	FISCAL BENEFIT
Residential (per Unit)					
Small Block Neighborhood - Traditional	Medium	Low	Medium	Medium	Neutral
Small Block Neighborhood - Neotraditional	Medium	Low	Medium	Medium	Neutral
Large Block Neighborhood - Traditional	Medium	Low	High	High	Negative
Nonresidential/Mixed Use					
Traditional Activity District	High	High	Medium	Medium	Neutral/Positive

HIERARCHY OF LOWER DENSITY DEVELOPMENT PROTOTYPES AND FISCAL BENEFITS

SUBURBAN	TAX REVENUE				
DEVELOPMENT TYPE	PROPERTY	INCOME	DEMAND FOR SERVICES	DEMAND FOR INFRASTRUCTURES	FISCAL BENEFIT
Residential (per Unit)					
Single Family - Early Suburban Neighborhood	High	Low	High	High	Negative
Single Family - Late Suburban Neighborhood	High	Low	High	High	Negative
Multifamily Complex	Low	Low	Medium	Medium	Negative
Mixed Residential	Medium	Low	Low/Medium	Low/Medium	Negative/Neutral
Nonresidential/Mixed Use					
Neighborhood Scale Activity Center	Low	L/M	Low	Medium	Positive
Community Scale Activity Center	Medium	L/M	Medium	High	Neutral/Positive
Regional Scale Activity Center	Medium	Medium	High	High	Neutral
Commercial Corridor	Medium	Low	High	High	Negative
Industrial					
Industrial Campus	Low	High	Low	Low	Positive
Industrial Corridor	Low	High	Low	Low	Positive

HIERARCHY OF HIGHER DENSITY DEVELOPMENT PROTOTYPES AND NON-FISCAL BENEFITS

TRADITIONAL TOWN / URBAN				
DEVELOPMENT TYPE	WALKABILITY	ENVIRONMENTAL IMPACT	SOCIAL INTERACTION	CAR DEPENDENCY
Residential (per Unit)				
Small Block Neighborhood - Traditional	High	Low	High	Low
Small Block Neighborhood - Neotraditional	High	Low	High	Low
Large Block Neighborhood - Traditional	Medium	Low	Medium	Low
Nonresidential/Mixed Use				
Traditional Activity District			Medium	Medium

HIERARCHY OF LOWER DENSITY DEVELOPMENT PROTOTYPES AND NON-FISCAL BENEFITS

SUBURBAN

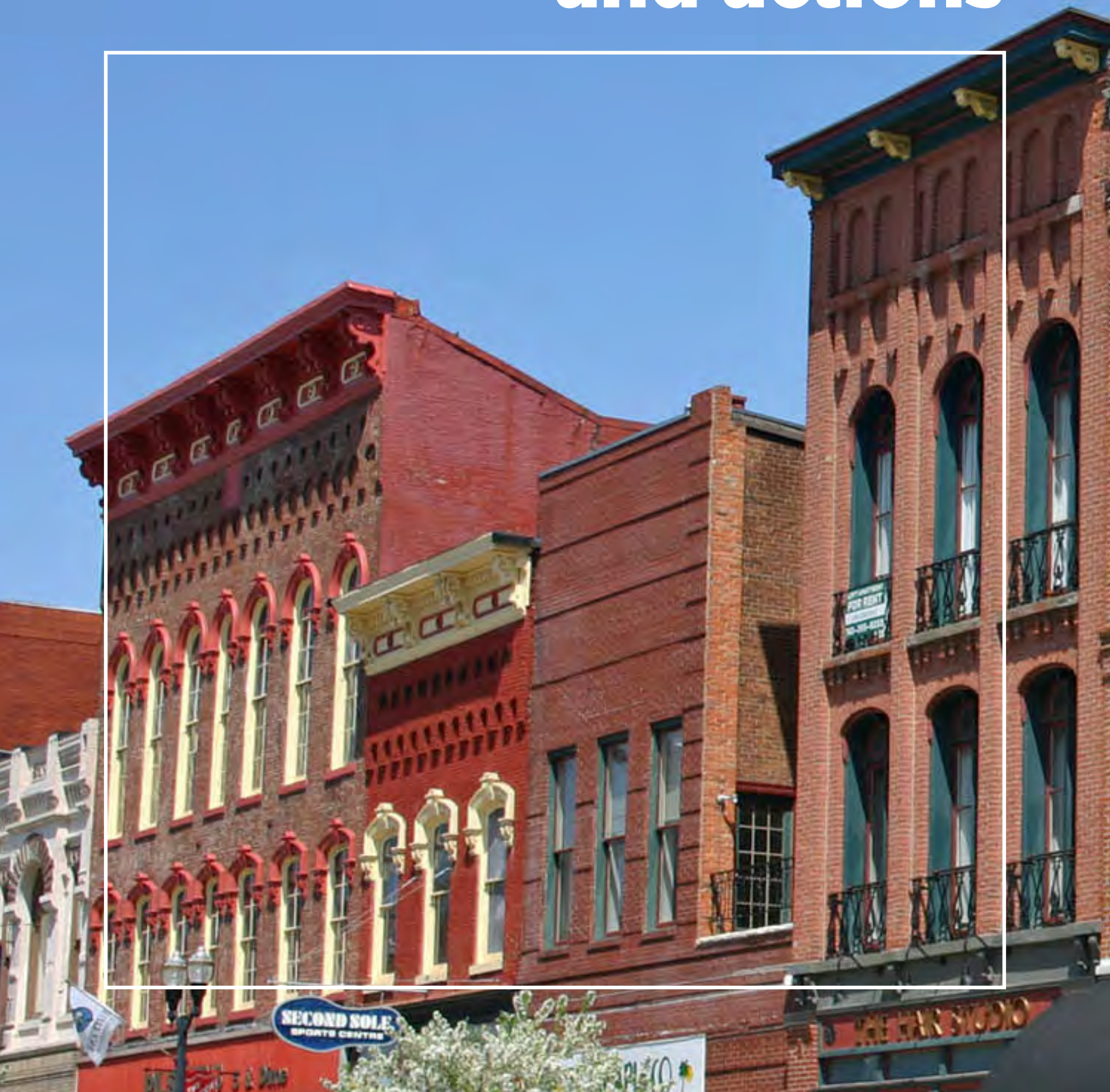
DEVELOPMENT TYPE	WALKABILITY	ENVIRONMENTAL IMPACT	SOCIAL INTERACTION	CAR DEPENDENCY
Residential (per Unit)				
Single Family - Early Suburban Neighborhood	Medium	Medium	Medium	High
Single Family - Late Suburban Neighborhood	Medium	Medium	Medium	High
Multifamily Complex	Medium	Medium	Medium	Medium
Mixed Residential	High	Medium	High	Medium
Nonresidential/Mixed Use				
Neighborhood Scale Activity Center	High	Medium	High	Medium
Community Scale Activity Center	Medium	Medium	Medium	High
Regional Scale Activity Center	Medium	Medium	Medium	High
Commercial Corridor	Low	High	Low	High
Industrial				
Industrial Campus	Low	High	Low	High
Industrial Corridor	Low	High	Low	High

LOOKING AHEAD

Maintaining the fiscal stability of the City is critical for the fulfillment of the objectives set forth in the Comprehensive Plan. Balancing fiscal sustainability objectives with overall and longer-term growth and development objectives is vitally important for the future of the community. Managing the City's budget in conjunction with the continuation of population growth is important due to the impact that growth has monetarily on service levels and infrastructure investments. As such, the City should look to expand partnership opportunities with both commercial and residential developers to leverage economic development tools including tax abatements, tax increment financing and community authorities to aid in the financing of infrastructure costs as linked to growth.

In addition, it is important to implement the broader goals and objectives of this plan, including the transportation elements. Longer term or broader policy and community priorities may not generate net fiscal benefits (at least not immediately) but they may be equally worthy of consideration and approval. Taking a longer term and larger view of fiscal sustainability will allow for the most flexible and responsive means to account for changes that are either out of the control of local jurisdictions or are impossible to account for at this time. A more comprehensive assessment of benefits and costs must be made in order to implement the various land use and policy objectives contained within this plan and is recommended in Chapter 7. To this end, the City has contracted with Regionomics LLC to estimate the fiscal impacts of selected specific development types and the overall fiscal sustainability of the City of Delaware in the Comprehensive Plan. The development type analysis will provide the basis for the Return on Investment (ROI) analysis contemplated in Action A.3.1 of the plan.

Chapter 7
Goals, objectives and actions



GOALS, OBJECTIVES AND ACTIONS

This chapter includes the plan's goals, objectives and actions. The six goals present the highest-level desired outcomes for the future of the City and provide overarching structure for the objectives and actions.

GOALS

A **Manage growth and change.** Direct, design and encourage new development to promote compatible land uses, create strong quality of place including a mix of uses where appropriate, support fiscal health and promote sustainability.

B **Advance economic prosperity.** Provide economic opportunity for all residents and support diverse, successful and resilient business and industry.

C **Build social cohesion and equity.** Foster Delaware's sense of community across geographies, income categories and demographic groups and provide stable foundations for a high quality of life.

D **Promote housing quality and variety.** Ensure a broad spectrum of housing options to meet the current and future needs of the population.

E **Leverage resources, infrastructure and amenities.** Preserve and enhance key historic buildings and neighborhoods, natural areas and open spaces, transportation and mobility options, and quality facilities and services.

F **Support fiscal sustainability.** Promote development, land use, infrastructure and other policies that will support a healthy fiscal position.

STRUCTURE OF RECOMMENDATIONS

This plan includes six goals, which reflect themes from technical analysis and community input. Each goal is supported by several objectives that organize the plan's actions.

GOALS

Intended results expressed in simple terms for the plan's topic areas. These represent overarching desired outcomes for the plan.

OBJECTIVES

Sub-themes within the goals that serve to organize actions.

ACTIONS

Projects, policies or programs that can be implemented.

GOAL A: MANAGE GROWTH AND CHANGE

Direct, design and encourage new development to promote compatible land uses, create strong quality of place including a mix of uses where appropriate, support fiscal health and promote sustainability.

OBJECTIVES

A.1 Encourage a greater mix of land uses in selected locations.

A.2 Encourage quality, higher density development in selected locations.

A.3 Promote fiscally sustainable development practices.

A.4 Manage outward growth beyond the existing corporate boundary.

A.5 Ensure transportation infrastructure investments that are sufficient to support new and existing development.

A.6 Coordinate with countywide and regional planning efforts.

A.7 Enhance design quality of residential subdivisions.

A.8 Improve design quality and align the design of major corridors.

A.9 Maximize compatibility between existing and new development, while allowing for appropriate changes.

A.10 Limit commercial sprawl to maintain land values.

A.11 Encourage development of vacant and underutilized parcels.

A.12 Encourage standards for new development that promote sustainability.

A.13 Encourage remediation and redevelopment of designated or perceived brownfield sites.

A.14 Enhance bicycle and pedestrian connections in association with growth and development.

A.15 Encourage infill and redevelopment in the Riverfront, Near East Side and South Sandusky Street Focus Areas.

A.16 Focus new development to the Southeast, Southwest and portions of the Far East Focus Areas.

A.17 Direct public realm improvements in "high impact" locations.

A.18 Guide and allow contextually sensitive change in Downtown including intensification of uses where appropriate.

A.19 Foster synergies and enhance connection between the Ohio Wesleyan University campus, Downtown and the South Sandusky Street Focus Area.

A.20 Update the Zoning Code and development policies to conform to the Comprehensive Plan.

A.21 Align the Capital Improvement Plan (CIP) with the Comprehensive Plan.

OBJECTIVE A.1

Encourage a greater mix of land uses in selected locations.

Mixed-use development—which can blend residential, commercial, cultural, institutional and/or entertainment uses into one area—can create vibrant environments with a high degree of social interaction. In selected locations in Delaware, mixed-use districts can also help to promote more walkable, less infrastructure-burdened, more environmentally sustainable (less car-dependent) and economically stable (more diversified) development. In order to be mixed-use, not all uses must be present but a diverse enough array of uses must be included in an area to fulfill the goals of this plan. Additionally, uses need not mix solely on a single parcel of land if size, scale and design do not support it. The City has several different examples of mixing uses, constructed at differing points, from which to draw inspiration. Utilizing these examples, as well as examples elsewhere in the field, will inform best practices about mixing uses moving forward. Examples can be found Downtown, along Houk Road South at Glennwood Commons and at Coughlin's Crossing.

Actions

A.1.1 **Adopt mixed-use zoning districts.** Updates to the Zoning Code (see Objective 20) should encourage Planned Mixed Use Districts (PMUs) or equivalent that are consistent with the specific locations and generally desirable types of areas as described in Chapter 5, Character and Land Use. If Focus Area Plans are adopted as recommended in this Comprehensive Plan, overlay districts allowing by-right mixing of uses where appropriate should be considered.



Many residents have expressed a favorable opinion about the mix of uses in Downtown Delaware. A similar mix could be promoted in selected other locations.

A.1.2 **Provide regulatory incentives.** Regulatory incentives such as density bonuses, transfer of development rights (TDR) or an expedited review process could be used to promote and direct mixed-use development in selected locations. Incentives should be consistent with housing incentive policies and the City's Economic Development Incentive Policy as described in Objective B.7.

A.1.3 **Allow mixed housing types within new neighborhoods.** In locations where this Plan (and any subsequent Strategic Plans) indicate mixed use is appropriate and desired, the zoning for such areas should allow for the desired mixed use. If the City's Zoning Code is updated, it should clearly define the criteria for mixed used and consider allowing it by-right.

A.1.4 **Work with experienced developers.** While not appropriate or desirable for all new residential subdivisions, recent development projects in the region demonstrate a demand for housing that is developed within a walkable, connected, mixed use setting. The City should seek to attract and work with developers that have experience and interest in developing such communities and who are willing to work collaboratively with the City in identified locations where mixed-use development is desired.



OBJECTIVE A.2

Encourage quality, higher density development in selected locations.

As a complement to encouraging mixed use development in selected locations, allowing for higher density in desired locations can help to support more sustainable and desirable growth (for example, the addition of in-demand housing units) while minimizing strain on expanding infrastructure and protecting open and agricultural space. It can help to provide a range of housing including attached housing for residents who work in the local community, enhancing the City's economic development goals. However, in order for higher density development to integrate into the existing environment, it will be critical that it is located so as to not adversely impact existing single-family only neighborhoods. It also must meet high standards for design quality of the units and the site, including landscaping, layout, roads, pedestrian paths, trees and other features.

Actions

A.2.1

Identify appropriate locations for quality, higher-density development. In accordance with the recommendations in this plan, locations in Downtown and certain areas in the vicinity may be appropriate for some additional density. In addition, mixed-use Activity Centers (nodes within or adjacent to existing development) can be appropriate for higher density if edge development conditions provide a buffer with single-use residential areas and design is of a high quality. In addition to the mixed-use Activity Centers identified in this plan, as Area Plans are developed for the Southeast and Southwest Focus Areas, specific locations for higher density should be identified, generally around transportation corridors. This should include decreasing density in reasonable ranges moving outward from these corridors, culminating in single family detached development.



The conservation of existing open space, especially to the North of the City, will be aided by clear annexation policies that priortize certain areas for development while encouraging the preservation of the existing rural condition in others.

A.2.2

Create design guidelines. Create guidelines to be applied to any locations where higher density is allowed that demonstrate how it can be integrated without adversely impacting existing lower-density areas. The guidelines may consider the building envelope (including height and massing), streetscape elements, circulation, building services, parking, open space, buffering, connectivity and other elements.

A.2.3

Create policies regarding density bonuses for developers. As articulated in this plan, providing attainable housing, encouraging mixed-use nodes of activity and integrating parks and amenities into development are priorities. These types of benefits could potentially be offered in exchange for allowing greater density in selected, appropriate locations, effectively clustering activity in proximity to major transportation corridors.

DENSITY BONUS

A density bonus is an incentive-based tool that permits a developer to increase the maximum allowable development on a site (or a portion of a site) in exchange for in-kind support for specified public policy goals or lowering density on another portion of the site or preserving open space.



Coughlin's Crossing, which is being built in phases on roughly 80 acres on the City's southeast side, is a mixed use development that includes housing, offices and retail space. The project also involves infrastructure improvements, open space and a bicycle path. It provides appropriate transition from single-family, traditional development on two sides to the major transportation, auto-oriented corridor of US 23. Smaller housing units in a more compact, walkable setting promise to attract young professionals and others looking to live in a high-quality community with the convenience of nearby amenities. (Image above shows plans as of 2019.)

OBJECTIVE A.3

Promote fiscally sustainable development practices.

As the City continues to grow, it will be important to understand its impacts and what sources of potential revenue can be used to offset them. (Guidance on this topic can also be found in Goal F.) Without appropriate and well-planned growth, fiscal sustainability is nearly impossible. On the other hand, if taken to the extreme and return on investment is the only consideration the City would serve no residents and only allow income tax producing uses. This extreme would ignore goals in this plan to create a diverse, populated, mixed-use connected community of people. Therefore, balancing fiscal objectives and other considerations is essential.

Actions

A.3.1

Conduct a "return on investment" analysis for major development proposals. Not all development projects bring net fiscal benefits to the City over the long term. For large-scale development proposals that require changes to zoning, public infrastructure investment or other financial incentives from the City, an assessment of the net fiscal impact should be conducted to evaluate the proposal. A fiscal return on investment (ROI) analysis would determine the net fiscal benefits to the City relative to costs for providing public improvements to support a development. This could be one factor in determining the viability and acceptability of a proposal. In order to support this Action an estimate of the fiscal impact of different development types should be completed as described in Action F.2.3. The City has used a similar ROI analysis for Economic Development related projects in the past.

FISCAL IMPACT OF DEVELOPMENT PATTERNS

Beyond land use, different development patterns have different fiscal impacts. Low density, dispersed development can lead to higher costs of infrastructure and community services. (The converse is also true.) Growth focused on existing urban areas can often utilize existing infrastructure and generate fiscal efficiencies, though has its own costs of service as well. See Chapter 6, Fiscal Sustainabllity, for more.

A.3.2 **Allow TIF districts in selected locations.** The City currently has 10 TIF Districts in place. While state-wide legislation enacted since the last comprehensive plan has made some changes to how TIF districts work, reducing some of their benefits to municipalities, in certain cases TIFs may still be desirable in selected locations. They can be an important tool in helping municipalities to afford needed infrastructure related to every development type.

A.3.3 **Study increase in fees for services.** The City collects engineering fees and building and zoning fees for development, among others. Increasing fees could help generate revenue to off-set operational costs. However, fees should be reasonably related to the costs of providing the service. In some cases technology or other tools and changes may necessitate a decrease in fees. Each fee should be studied and set specifically as a result.

A.3.4 **Consider increasing development impact fees.** Development impact fees are one-time payments from developers to cover a calculated cost of the new development. They provide a source of revenue that can assist with maintaining fiscal health as communities grow. In 2001, the City of Delaware began collecting impact fees. In 2018, the City commissioned an update to the original study. The update is currently in draft form. Increasing fees could help generate revenue to support new development as it takes place. Fees need to be carefully and specifically set to ensure their defensibility and their connection to the community's need for the capital items to which they relate.

TAX INCREMENT FINANCING (TIF)

This tool provides a means of capturing the net increase in property taxes generated by new non-residential development and allocates those funds to pay for related infrastructure (roads and utilities). This mechanism benefits the buildout of major roads, infrastructure, etc. associated with large developments. The City establishes Tax Increment Financing (TIF) districts to help fund infrastructure related to specific projects. This is typically through allowing a developer to re-coup a portion of costs associated with installation of major infrastructure with broader community benefits. The net increase in property taxes for a defined time period is captured and allocated to a portion the related improvements.

IMPACT FEES

The City collects impact fees for police, fire, parks and municipal facilities. The fees could be expanded to include roads as well as other capital needs. Fees cannot be used for operational needs. As a result, the City can collect impact fees to build and equip a new fire station, for example, but must provide general fund dollars to staff such new facilities.

OBJECTIVE A.4

Manage outward growth beyond the existing corporate boundary, but within the utility boundary.

Unchecked, unplanned and unconstrained annexation and outward expansion of development beyond current City limits can strain municipal finances (due to the cost to service areas), the environment (due to the impacts on natural resources, and other factors) and quality of life (due to the potential for greater social isolation from disconnected communities and less choice for amenities and recreation within close proximity). Growth should be directed when possible to the Focus Areas identified in this plan. Other potential development in unincorporated areas should be carefully considered. There are several large areas of potential, focused annexations which are within the long standing utility boundaries of the City and within the Focus Areas. The City has made large investments in its utility infrastructure to be able, in part, to service these areas in anticipation of annexation when appropriate.

Actions

A.4.1

Create guidelines for supporting annexations. An annexation policy would identify priority areas for potential future annexation and outline terms for properties annexing into the City. Those terms should include rezoning of a property in accordance with this plan as well as any subsequent area plans that are created. This means that the unincorporated portion of the Southeast Focus Area and the unincorporated portion of the Southwest Focus Area would be the priority for potential new annexations over the planning period of this plan. Annexation policies should also be considered in light of school district synergies.



A.4.2 **Develop criteria to be used for development outside of Focus Areas.** Development located outside of Focus Areas should be based upon the following criteria for the proposal (See Chapter 5 for Focus Area Maps):

- It meets the goals, principles and objectives of the Comprehensive Plan;
- It is consistent with the Zoning Code and development policies of the City;
- It does not conflict or compete with current development and infrastructure needs of the City; and
- It fulfills fiscal sustainability goals and/or a strategic need for the City.

OBJECTIVE A.5

Ensure transportation infrastructure investments that are sufficient to support new and existing development.

In close association with any new development, transportation infrastructure is needed in order to provide adequate access and connections within and between newly developed areas. The City should also recognize changes to commuting patterns, including increases in telecommuting, in concert with these investment decisions. It is important to consider uncertainties regarding long-term work-from-home trends following from the COVID-19 pandemic.

Actions

A.5.1 **Pursue recommendations of the City's Thoroughfare and Transportation Improvement plans.** The City is currently undertaking new Thoroughfare and Transportation Improvement plans (to be adopted concurrently with this plan) that include new roadway and infrastructure improvements for anticipated long term growth. Delaware City Council has also adopted a complete street strategy and policies that accommodate demand for new travel alternatives, including bicycles / bicycle sharing, car / ride sharing, electric vehicles, and others. Innovative engineering solutions to roadways and the application of smart technology are also prioritized.

COMPLETE STREETS

Complete streets meet the needs of people in all forms of transportation: walking, cycling, driving, and taking transit. Complete streets aim to create safer interactions for all users, despite age or abilities. In some situations where road traffic is dominated by fast traveling vehicles, traffic calming measures can help to make an area more pedestrian friendly. Examples may include, curb bulbs, landscaped medians, on-street parking or narrowed travel lanes. Complete streets may look different in a rural context versus an urban one, assuming the design follows the same core principle.

A.5.2

Assess potential for an Adequate Public Facilities Ordinance (APFO). The City uses a number of tools to mitigate infrastructure impacts in particular areas. This includes requirements for the provision of water and sanitary sewer service, certain road improvements, sidewalks, bike paths and park facilities concurrent with development. By formally adopting an APFO, the City would establish clear Level of Service (LOS) standards for all municipal facilities and services and require the provision of these facilities and services at certain LOS standards concurrent with development.

ADEQUATE PUBLIC FACILITIES ORDINANCE (APFO)

An APFO is a tool that a city can use to manage growth by establishing a process for analyzing a proposed development's impacts on public infrastructure, including water and sewer line capacity, roads and schools.

A.5.3

Support recommendations in Goal E, Leverage resources, infrastructure and amenities. Transportation infrastructure is further addressed n Goal E and Actions under that goal will serve to reinforce those put forth in this objective.



OBJECTIVE A.6

Coordinate with countywide and regional planning efforts.

The City of Delaware will benefit from coordinating closely with others in the region in order to address where and how the City should grow relative to the broader context. Specifically, on issues such as housing and economic development, a regional approach promises to create opportunities for advancing shared interests.

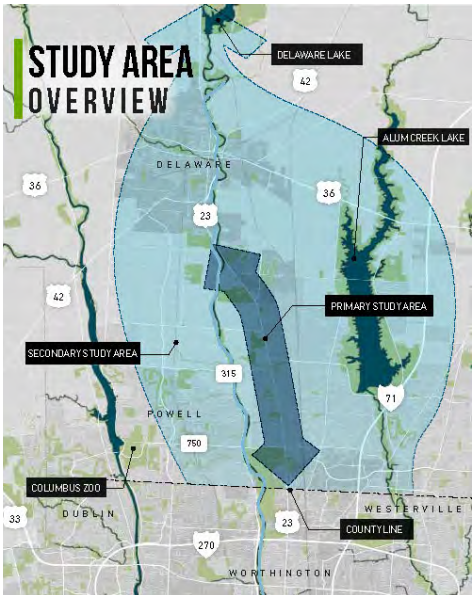
Actions

A.6.1

Become full member of Delaware County Regional Planning Commission (DCRPC). The City should become a full dues-paying member of the DCRPC when funds become available. The DCRPC provides a forum for addressing countywide growth issues. It is also the formal mechanism for providing a recommendation on township zoning matters and county subdivision matters. As a full member, the City can bring comments regarding zoning and subdivision matters within its planning area and can share issues for discussion with the DCRPC board. This is particularly important as growth is now headed into the City utility boundary edges from the south.

A.6.2

Coordinate with Route 23 Corridor Strategic Guide. The Route 23 Corridor Strategic Guide addresses US Route 23 corridor from the southern county line of Delaware County to the City of Delaware. The City should work with other local jurisdictions to advocate for and become part of a regional task force to help guide the work, particularly for areas inside the City or the City's utility boundary, while working toward shared goals for the gateway corridor as a whole.



The planning area for the US Route 23 Corridor Strategic Guide includes an area with multiple jurisdictions that is poised for continued residential growth as well as opportunity for non-residential development. A consensus-driven approach to building a shared vision for the corridor will be critical to its success. (Source: Presentation of Route 23 Corridor Strategic Guide by MKSK)

A.6.3 **Prepare joint land use plans with DCRPC in priority locations.** The City should work collaboratively with DCRPC to plan for priority locations, potentially including but not limited to the US Route 36 / State Road 37 Corridor.

A.6.4 **Continue to participate in the Mid-Ohio Regional Planning Commission (MORPC) as a member.** MORPC is central Ohio's regional council of governments and includes more than 70 members comprised of counties, cities, villages, townships and regional organizations. MORPC leads in developing plans and studies in coordination with its members on a range of topics, including transportation, housing and sustainability. The City of Delaware should continue its membership in MORPC in order to maintain opportunities for regional collaboration on issues of shared interest and advocacy.

A.6.5 **Participate in key regional studies and plans.** In addition to general coordination with members, MORPC regularly invites members and other regional stakeholders to participate in regional studies and plans. The City of Delaware was a contributing stakeholder in a Regional Housing Strategy, which addressed a range of considerations, including regional supply, affordability and market gaps and opportunities. The City should continue to participate in this and similar efforts and implement recommendations where appropriate.

REGIONAL HOUSING STRATEGY

MORPC, the City of Columbus, and other regional partners, including Delaware, completed a housing strategy for Central Ohio in Summer 2020. It includes the following:

- Reviews existing studies regarding current housing supply and lack thereof, and supplements those studies with additional data to provide a comprehensive view of today's housing market.
- Recommends investment priorities for the region's public and not-for-profit housing dollars to achieve the greatest impact on affordability in our market.
- Identifies gaps where new funding streams can be developed based on strategies from other markets around the country.
- Identifies impediments to the development of sufficient housing to meet demand in the market and suggests regulatory strategies.
- Sets forth metrics for individual communities and the region as a whole to judge the performance of the regional housing market in meeting the needs of residents.

OBJECTIVE A.7

Enhance design quality of residential subdivisions.

Delaware's residential subdivisions vary significantly with respect to design quality. As new subdivisions are built it will be important to draw from examples from the past (positive and negative) and support a high quality of design while being mindful of overall affordability.

Actions

A.7.1

Update design guidelines for residential subdivisions. The City should update design guidelines for residential subdivisions, which inform review and construction permitting decisions. The guidelines should help to create residential neighborhoods that are cohesive, attractive and have a human scale that encourages opportunities to socialize with neighbors. They should also help to create variety between subdivisions, to make them distinguishable from each other and improve both marketability and sense of place. Cues should be taken from the recently adopted Planned Mixed Use Overlay Zoning Districts (PMUs) to begin updating design guidelines.

A.7.2

Review and assess conservation subdivision overlay district. The Planning Department has prepared requirements for a zoning overlay district that explicitly permits conservation subdivisions (also known as open space subdivisions), but more importantly, guarantees a gross density comparable to a "straight" residential district, while providing for smaller lots that are clustered. Open space set asides normally equal about 50% of a site. They should be reviewed to determine if changes should be made to enhance them or improve their effectiveness. The goal should be to promote sensitive development on sites with significant natural resources primarily in the northern portion of the Far East Focus Area. (See Chapter 5 for Focus Area Maps.)

CONSERVATION SUBDIVISIONS

Conservation or open space subdivisions are a type of clustered development in which large portions of a site are set aside in perpetuity as open space. This open space can be natural such as a wood lot, wooded ravine or meadow, or used for agricultural purposes, such as a fruit tree orchard. Home sites are clustered and smaller than allowed by code to provide for a greater set aside of open space. The gross density of the site is comparable as if the site were divided into traditional lots. Studies find that homes in such developments are higher valued, often with price tags comparable to golf course communities, which tend to be higher-priced housing units.



A.7.3

Create an entranceway matching grant program. The City should support pre-existing Homeowner Associations' efforts to enhance their neighborhoods through matching grants for high-quality, sustainable neighborhood entranceway beautification and maintenance projects.

OBJECTIVE A.8

Improve design quality and align the design of major corridors.

More robust standards for building design, landscaping, signs and lighting should be developed for corridors citywide, with specific standards along key corridors.

Actions

A.8.1

Update corridor design guidelines. The City's Gateway and Corridor Plan should be updated and applied to specific corridors to address access, parking, lighting, landscaping, signage and a range of other characteristics and features that can greatly impact both the functionality and the overall design quality of corridors. Potential corridors that could benefit from specific design standards include U.S. Route 23 South and North, US Route 36/State Route 37 east, and South Sandusky Street. These design standards should be in accordance with this Comprehensive Plan and any Focus Area plans.



There is a striking contrast between the design of legacy (top) and more recent (bottom) commercial development along corridors. More recently, higher standards for amenities and landscaping have been required.

OBJECTIVE A.9

Maximize compatibility between existing and new development, while allowing for appropriate changes.

As new development takes place, it will be vitally important to the City's character that edge conditions between areas create buffers between incompatible uses to ensure compatibility. It is equally important to create a connected and seamless community when uses are generally compatible and where a certain mixing of uses is desired. This will require enhanced use of design parameters instead of buffering.

Actions

A.9.1

Require transition areas at edges of development. As the plan is implemented, it will be important that Development Types allowed for at the edges of new development areas, including but not limited to the Southeast and Focus Areas, are compatible in use, character and scale with existing neighborhoods. In historic neighborhood patterns, these transitions can often be created in subtle ways using transitional uses designed expertly to provide connections between core development type areas. Future zoning code changes in these areas should specifically require that only Development Types that are appropriate to the surrounding context are located at edges, which could include the use of missing middle development housing to provide for appropriate density transitions. (See Chapter 3 for more information on missing middle housing). In addition, landscape buffers including parks, trails and natural areas should be encouraged in transition areas and transitional uses should be utilized.



OBJECTIVE A.10

Limit commercial sprawl to maintain land values.

Disconnected linear development along major corridors will create a sprawl-type pattern that will negatively impact traffic flow, devalue private investments in the long term, and create management issues for the City (such as service issues). Compact, clustered, connected and better-integrated development could accommodate a wider range of uses, create meaningful open spaces and coordinate services.

Actions

A.10.1

Require coordinated development on larger parcels. Through the use of design guidelines for corridors, as described in Action A.8.1, the City should require coordinated development with consistent architecture, materials, signage, and landscaping, consolidating access and utilities. (This may not be possible for all lots and developments where there are pre-existing small lots.) The use of Planned Mixed-Use Development Districts (PMUs) may also be appropriate at selected locations. Finally, corridor plans should be pursued for key corridors that align with the elements of this Comprehensive Plan.



The Riverfront District provides a prime example of an area where infill and redevelopment can be encouraged.

A.10.2

Assess impact of post-COVID-19 impact upon commercial development. Beginning prior to the COVID-19 pandemic and accelerating as a result of it, changes to working preferences and business operations have impacted demands for office and retail space. The City should assess whether trends are expected to be long term. If demand for office and retail is expected to decrease, the City should identify opportunities for infill development. In pre-existing legacy commercial centers ("gray fields") the introduction of other land uses (e.g. residential) may be appropriate. In areas contemplating new commercial and office development ("green fields"), a mix of compatible uses may promote long term health and vitality of these areas.

OBJECTIVE A.11

Encourage development of vacant and underutilized parcels.

There are many vacant and underutilized parcels throughout the City. Some of these areas are smaller parcels that would be appropriate for infill. Others are much larger and could accommodate significant new development or redevelopment. These areas should be targeted for their economic development opportunity and potential to revitalize neighborhoods while ensuring that they add to the fabric of a neighborhood as opposed to replacing or destroying it.

Actions

A.11.1

Implement Action A.17.2, Target property tax incentives. Use of incentives can assist not only in improving the physical environment in key locations, including the Riverfront and South Sandusky Street Focus Areas identified in this plan, but also in providing economic development opportunity.



Vacant property on the Near East side and other developed areas in the City presents an opportunity for new development that can re-knit the urban fabric while minimizing the need for new infrastructure.

A.11.2

Establish a City CIC and Partner with the County Land Bank. One of the City's major competitive factors is the price of industrial/business land. It is crucial for the City's long-term viability. The City should consider actively holding property through the creation of an industrial/business land bank. This could serve as the motivation to develop a City-owned or developed business park, which is a common economic development strategy for local government. A Community Improvement Corporation (CIC) can serve as a land bank. The City would use a host of financing tools to fund the acquisition and development of the park and not only general fund dollars. Partnerships with private developers, land owners and financing agencies are a critical component to success. This could also be accomplished through a partnership model tying incentives to outcomes.

A.11.3 **Create a commercial vacancy inventory.** An inventory should be created regarding vacant commercial property including operational status (vacant, partially vacant, occupied), property ownership, for sale vs. for lease, existing zoning, market value, and property condition. The data should be organized and associated with GIS mapping to identify 'hot spots' of commercial vacancy and worsening areas based on current conditions. This information can be used as a tool for working with property owners and potentially providing incentives. This is especially important to conduct in light of a potential increase in vacancies or use transition due to the COVID-19 global health crisis and what it, or future crises, might do to traditional commercial development.

A.11.4 **Assess incentive options for vacant storefront utilization.** The City will work with retail center owners/managers to address ongoing tenant space vacancies. In addition to vigilant code enforcement to ensure such properties continue to be well maintained, specific incentive programs will be identified and implemented.

A.11.5 **Establish a pop-up retail program.** A pop-up retail program should be developed that includes small grants, assistance with occupancy permitting and/or resources to match entrepreneurs with available space. In light of potential vacancies due to the COVID-19 global health crisis such a program may be especially attractive. This program could potentially be coordinated with the Entrepreneurial Center. The City could also consider a fee for vacant storefronts to discourage landlords from intentionally leaving a storefront vacant for tax purposes.

POP-UP RETAIL PROGRAM

Temporary uses can activate underutilized retail areas and their surroundings and build excitement about the future. They can also provide an opportunity for local entrepreneurs to incubate business ideas and gain experience while limiting risk and to test unique concepts that have the potential to turn into long-term, successful businesses. (Photo by Gilda from London, UK - Marmite pop-up shop. Uploaded by Edward, CC BY-SA 2.0, https://commons.wikimedia.org/w/index.php?curid=11833977)



OBJECTIVE A.12

Encourage standards for new development that promote sustainability.

The City values energy efficiency and sustainable development practices. Since the last comprehensive plan, there has been a growing interest in integrating sustainable development practices into new development. Such practices can include incorporating green infrastructure / stormwater management, preserving existing open space and natural resources, integrating green energy and creating building patterns that allow for a range of modes of transportation and access. While some private developers have willingly and enthusiastically embraced such practices, more work can be done to further enhance sustainable development efforts.

Actions

A.12.1

Maintain current required environmental analysis. Developers for major developments are required to submit information regarding the environmental impacts of any proposed new development. Standards have been adopted to discourage development of significant slopes and mitigate development on poorly drained soils. Development is also generally prohibited in the regulatory floodplain. Development has also worked to address environmental goals such as preserving trees, enhancing green space, buffering waterways, and allowing more compact development, thereby limiting sprawl. These requirements should be continued.



The Delaware City Wetland Park was built as part of large mixed use development project including in-line retail and services, 'big box' retail, and an apartment complex, and is a significant natural asset and public amenity.

A.12.2

Develop a program to promote energy efficient buildings. Energy efficient buildings can lower greenhouse gas emissions, reduce water consumption and provide financial savings to owners. The City, in coordination with local organizations, could develop a program to explore incentives, education or other methods of encouraging greater energy efficiency in both new construction and existing buildings (via renovation/retrofits). Care should taken to consider costs associated with efficiency upgrades.

A.12.3

Revise requirements for landscaping and species listings. Currently, the City requires that new development proposals include measures for conservation and mitigation of species habitats as well as a list of plant species to be used in landscaping. More specific requirements are needed to ensure that native species are protected and that introduction of new landscaping is generally compatible with native species (free from invasive species). The tree preservation code should be updated to better balance preservation and new planting and to reasonably exclude requirements where public infrastructure is required. The current regulations should be reviewed, revised, and adopted in accordance with this.



The City has used permeable pavers in parks, in ways that can be a model for private developers.

A.12.4

Develop new standards for roads in subdivisions. Sustainable neighborhood road design can help residential communities to minimize stormwater runoff, improve conditions for multimodal transit and protect natural resources. This may involve considering narrower roadways in certain developments. The standards for new subdivisions may differ from other contexts (rural areas, more urbanized areas and/or areas that require higher traffic volumes and speeds). Dimensional standards, configuration (including specific cul-de-sac standards), construction guidelines (e.g. to minimize erosion) and use of LID strategies such as riparian buffers should all be considered. This could have the benefits of reducing long-term maintenance to the City as well.

A.12.5 **Require developers to show greenspace connectivity.** Greenspace connectivity and identified greenway corridors should be required to be provided, similar to road connectivity, for new subdivisions and developments. The City should maintain flexibility with respect to what is deemed to be acceptable based on the specifics of each proposal.

A.12.6 **Audit Zoning Code to identify opportunities for Low Impact Development (LID).** LID approaches to managing stormwater runoff integrate a site's natural features and emphasize conservation as ways to minimize adverse impacts on water quality. By mimicking natural processes, LID can complement hard infrastructure to reduce the overall volume and speed of water runoff as and the amount of pollution released into waterbodies. Integrating LID into the Zoning Code or engineering requirements would broaden the use of these practices while meeting state and federal requirements. This should begin with an audit of the existing code to identify opportunities to make changes that would promote LID followed by making any recommended changes.

A.12.7 **Pursue pilot LID projects.** Sometimes the best way to demonstrate the value of LID is to start small. The City can work with interested community members to identify opportunities for pilot projects, and secure funding, to incorporate LID into public spaces. These small scale projects can be used to garner public support and showcase the potential of such projects.

LOW IMPACT DEVELOPMENT (LID)

LID (also sometimes referred to as Green Infrastructure) emphasizes conservation and the protection of on-site natural features while allowing development to occur. Five core principles include:

- Conserve natural areas wherever possible;
- Minimize the development impact on hydrology;
- Maintain runoff rates and duration from the site;
- Scatter integrated management practices throughout the site; and
- Implement pollution prevention, proper maintenance and public education programs.

Some examples of Low Impact Development that can be integrated into new projects or existing areas include:

- Allowing usable green roofs on large format flat roofed buildings;
- Encouraging sustainable design of ponds or other water features;
- Integrating bioswales, rain gardens or other stormwater retention interventions;
- Minimizing impervious surfaces;
- Introducing pollinator gardens; and
- Allowing solar panels as-of-right.



OBJECTIVE A.13

Encourage remediation and redevelopment of designated or perceived brownfield sites.

Brownfields are properties for which use and/or development may be complicated by the presence or potential presence of a hazardous substance, pollutant or contaminant. Vacant brownfield sites are found in the City due to its industrial history, and also include sites with past petroleum or other chemical history. In order to support objectives of this plan to focus development on infill opportunities, promote economic development and enhance sustainability, brownfield remediation should be encouraged when possible.

Actions

A.13.1 **Conduct an inventory and audit of brownfield sites in the City.** A detailed inventory should be undertaken to identify these sites, document their characteristics, and recommend options for cleanup and redevelopment. This is an important first step in managing a successful program to target sites for remediation and redevelopment.

A.13.2 **Prioritize vacant brownfield sites for redevelopment.** Based on the survey work described in Action A.13.1, the City should work with property owners to identify top priority sites. Several sites are located in the oldest neighborhoods of the City and could hamper revitalization efforts if environmental concerns are found to be present and are not addressed. Economic incentives could be focused on these sites to jump start clean-up and reinvestment.

WHAT IS A BROWNFIELD?

The Ohio Environmental Protection keeps an inventory of brownfields throughout the state. These properties have received funding through the Clean Ohio Assistance Fund (COAF), Clean Ohio Revitalization Fund (CORF) or U.S. EPA's Brownfield Grants. In addition, cities, counties, townships, villages and private property owners are encouraged to list their brownfield properties on this Inventory. It is important to note, however, that the term "brownfield" is often misunderstood, as well as often used more generally to identify abandoned or underutilized properties whose redevelopment is hindered due to real or perceived environmental contamination. Under a broader definition, properties can range from more traditional, large-scale manufacturers to vacant neighborhood gas stations. These properties also can often benefit from identification in order to increase their potential for future funding, as well as to help focus redevelopment and sometimes clean-up efforts.

A.13.3

Establish a brownfield remediation program. The City should create and facilitate a program to promote brownfield sites for remediation and potential redevelopment. This would include undertaking the inventory and analysis noted above, locating state and federal grants to assist with clean-up and packaging and marketing sites for redevelopment. The City should investigate economic options for encouraging cleanup and redevelopment. This would also involve working collaboratively with property owners. A package of economic incentives should be consistent with the City's Economic Development Incentive Policy (EDIP). Once the package is adopted, marketing material that promotes incentives should be prepared and circulated to property owners and potential developers.



Sites such as old gas stations are ideal candidates for remediation.

OBJECTIVE A.14

Enhance bicycle and pedestrian connections in association with growth and development.

As the City grows and develops it will be important to link new areas with desired bicycle and pedestrian connections, including enhanced sidewalks, multimodal paths, greenways and other accommodations. This objective should be pursued in combination with other efforts to support multimodal travel as described in Goal E.

Actions

A.14.1

Implement the Bicycle and Pedestrian Master Plan 2027. As described in Action E.10.1, the City's Bicycle and Pedestrian Master Plan proposes both overarching approaches and specific recommended connections for people traveling by foot and bicycle. It anticipates further growth of the City and its implementation will be a key way in which growth can be accommodated while supporting high quality of life.

A.14.2 **Update the Bicycle and Pedestrian Master Plan as needed to address growth and development.** As new areas of the City are developed, the Bicycle and Pedestrian Master Plan should be assessed and adapted as a living document that embraces and responds to change.

A.14.3 **Provide connections from newly developed areas to greenway corridors.** As new neighborhoods and employment centers are built, connecting them to greenway corridors will support bicycle and pedestrian travel. The City should work with developers and others to anticipate future needs and accommodate them as feasible within and between new developments as they are built (or even prior to construction) as opposed to designing and constructing them later. This will help to ensure that travel patterns are established and other investment decisions coordinated as new communities are emerging.



A.14.4 **Create Greenway Master Plan.** Pedestrian connectivity and linear greenway preservation are important objectives of this Plan. A Greenway Master Plan should be created to identify corridors, include public input into the process, and ensure an interconnected greenway system. The Olentangy River and its tributaries, such as the Delaware Run, form natural greenways. However, other types of greenways are not centered around water corridors, such as forested areas, that could provide interconnection opportunities. Once created, the Greenway Master Plan should be advanced for formal adoption by City Council. It should be incorporated into the overall Parks and Recreation Master Plan as note in action E.2.3.

OBJECTIVE A.15

Encourage infill and redevelopment in the Riverfront, Near East Side and South Sandusky Street Focus Areas.

The Riverfront, US 36 East Gateway and South Sandusky Street Focus Areas fall primarily within City limits and have been identified as having significant opportunity for infill and redevelopment. (See Chapter 5 for more information about these areas.) Encouraging sensitive infill and redevelopment provides an opportunity for improving the built environment, supporting economic development and providing needed housing and amenities within these areas. These areas are established neighborhoods that are already served by infrastructure and have existing residents and businesses that have a stake and an interest in their future and should be consulted on future plans. Strategies to avoid displacement of current residents should be a priority.

Actions

A.15.1 **Prepare Area Plans.** A community-driven process should be conducted to create detailed area plans that build upon the recommendations for each Focus Area in Chapter 5, Character and Land Use.

A.15.2 **Align zoning overlay district regulations to area plans.** Prepare zoning overlay districts in accordance with area plans as recommended in this plan to facilitate and streamline their implementation.

A.15.3 **Consider incentives.** Consider specific incentives to facilitate implementation of area plans consistent with this plan.



OBJECTIVE A.16

Focus new development to the Southeast, Southwest and portions of the Far East Focus Areas.

In addition to the Focus Areas of the City that should be prioritized for infill and redevelopment, two areas should be prioritized for new development. The Southwest Focus Area, which is partially within City limits and partially outside of them, includes a vital concentration of industrial and business uses as well as property that is currently undeveloped. The area provides the potential for limited residential uses to be integrated as a transition to other residential areas and to support area businesses with attainable housing. The Southeast Focus Area falls outside of current City limits but remains within the longstanding City utility boundary. The area provides opportunities for new development that is adjacent to infrastructure and appropriate uses.

Actions

A.16.1 **Prepare Area Plans.** A community-driven process should be conducted to create detailed area plans for these areas. The plans should begin from policies and recommendations for each Focus Area in Chapter 5, Character and Land Use. The area plan for the Southwest Focus Area should include information described in Action B.8.2.

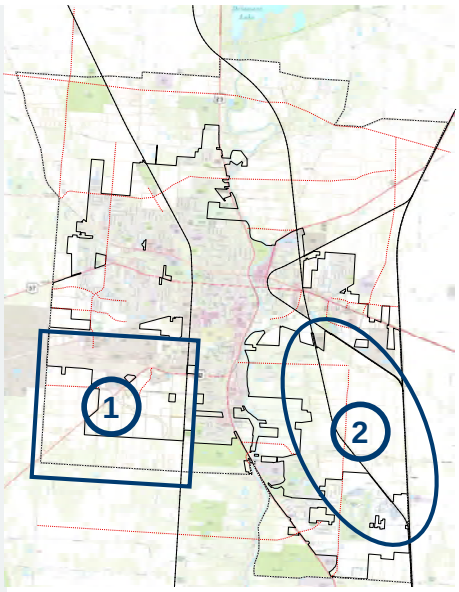
MANAGED GROWTH AND AREA PLANNING

① SOUTHWEST

The Southwest Focus Area is dominated by industrial and business uses, which fan along US Route 42 West and nearby streets. Older industrial areas within the "Central Industrial" triangle formed by London Road, Liberty Road, and U.S. Route 42 accommodate a handful of heavy industrial facilities alongside residential neighborhoods and under-utilized buildings and land. Newer areas south of the airport have attracted several light industrial, high-tech and business uses and plans for land along Sawmill Parkway have envisioned more industrial and business development further south. There are transitions and land uses to consider which differ between the west and east sides of US 42, south of the airport. Activity nodes and residential uses should be considered appropriate in this area.

② SOUTHEAST

The Southeast Focus Area is almost entirely agricultural with larger lots and some single family residential uses, mostly along Curve, Braumiller, and Berlin Station Roads. More intense development should be located around major transportation corridors such as the future Glenn Parkway with mixed-use nodes that transition to less intense uses.



OBJECTIVE A.17

Direct public realm improvements in "high impact" locations.

The comprehensive planning process revealed a number of locations in the City that suffer from disinvestment, a poor quality built environment and/or a lack of public amenities such as sidewalks. These areas include the Point (intersection is located at the location where U.S. 36 and State Route 37 converge on the east side), the London Road and South Sandusky Street corridors, the Lake Street Train Station area, the Southwestern Gateway (Sawmill Parkway), and the Northern Gateway (U.S. 23 N coming from the North). Directing public investment and incentivizing private investment in these areas can have a significant positive economic impact (increased housing values in neighborhoods, increased patronage of businesses in commercial areas and increased housing diversity) and can catalyze change in these areas to make them more attractive, vibrant and better connected to the rest of the City.

Actions

A.17.1 **Focus beautification efforts.** The City should focus beautification efforts on "high impact" areas that have been identified as being in need of improvement. Each of these areas is important because of its visibility to the community but suffers from quality of place concerns and therefore does not inspire people to want to live, work or spend time there. Public realm improvements should include capital improvements to the streetscape such as lighting, wayfinding and branding, landscaping, pedestrian facilities and utilities.



The proposed "Point" project will relieve congestion and increase safety along US 36 and SR 37 by increasing the number of vehicular lanes beneath the Norfolk Southern Railroad bridge. The roadway improvements should be leveraged for additional improvements in the immediate vicinity. It will also include pedestrian connections. Above is a rendering of the anticipated completed project.

A.17.2 **Target property tax incentives.** The City should offer property tax incentives to projects on the property improvements made to parcel(s) within Community Reinvestment Areas (CRA) or Enterprise Zone Areas that align with "high impact" areas. Incentives should be consistent with the City's Economic Development Incentive Policy as described in Objective B.7.1. Tax Increment Financing (TIF) Districts should also be pursued.

A.17.3 **Create design guidelines.** "High impact" areas should be improved through design guidelines that support higher quality design and pedestrian-friendly development. Landscaping improvements and branding/signage should also be included. This would help to promote improved quality of place as development takes place.

COMMUNITY REINVESTMENT AREAS (CRA)

Community Reinvestment Areas are areas of land in which property owners can receive tax incentives for investing in real property improvements. The Community Reinvestment Area (CRA) Program is a direct incentive tax exemption program benefiting property owners who renovate existing or construct new buildings. This program permits municipalities or counties to designate areas where investment has been discouraged as a CRA to encourage revitalization of the existing housing stock and the development of new structures. Source: City of Delaware, Department of Economic Development.



The City's historic, vacant train depot provides an opportunity for catalytic redevelopment.

OBJECTIVE A.18

Guide and allow contextually sensitive change in Downtown including intensification of uses where appropriate.

Delaware's historic Downtown architecture is one of its greatest and most valued assets. Since the last comprehensive plan, Downtown Delaware has not only developed to support thriving small businesses, including restaurants and retail, but has maintained—and indeed enhanced—its historic character. This has been due to a combination of careful planning, collaborative efforts to support local businesses and successful initiatives to preserve character-defining features of the built environment. It is important that the City continue and build upon these practices.

Actions

A.18.1

Continue to pursue sensitive infill and redevelopment. Downtown Delaware has benefitted from many investments in Downtown in recent years, which have helped to support a desirable environment for small businesses to locate and people to reside and visit. By continuing to apply current review processes and policies for new development, in addition to pursuing new preservation and economic development efforts, the City can expect to continue to see downtown continue to develop in ways that maintain and enhance its existing character.



In 2019, the City of Delaware was honored with a recognition of Downtown as one of America's Great Places by the American Planning Association. City leadership traveled to Washington DC to accept the award.

A.18.2

Follow best practice in historic preservation. In addition to continuing to ensure that infill and redevelopment projects are sensitive to the existing context, strategies should be pursued for preserving existing historic buildings, as described in Goal E. This will help to leverage resources, infrastructure and amenities and streamline regulations where feasible.



Renovations and redevelopment in Downtown should respect its existing scale and massing within existing historic areas. Infill sites where the context has already been significantly altered may present some opportunity for increased intensity of development if carefully designed.

A.18.3 **Study the expansion of the downtown area's planning boundary.** The City should conduct an assessment of whether the downtown area's boundary should be expanded for planning and regulatory purposes. (This does not necessarily mean that the historic district overlay would change.) This would account for potential infill or redevelopment opportunities around the edges of the current Downtown primarily to the south and west and to better connect the core Downtown to these similar adjacent areas.

A.18.4 **Identify potential sites appropriate for intensification.** Within the larger Downtown planning area, there are sites that are suitable for intensified uses. Provided a high level of design quality is required and compatibility with adjacent uses is ensured, this presents an opportunity to support activity and vibrancy in a way that will build upon and enhance existing uses and provide for a larger, permanent Downtown residential population.

A.18.5 **Support economic development efforts.** An attractive vibrant physical environment is directly linked to the economic health of downtown. In order to maintain downtown's aesthetics, it will be critical to also pursue the actions for downtown's businesses as described in Goal B, "Advance economic prosperity." This should include consideration of establishing a Special Improvement District (SID) in the Downtown area.

DOWNTOWN FACADE GRANT PROGRAM

The goal of the Downtown Facade Program is to help business owners invest in their properties, while improving the appearance and historic character of Downtown Delaware.

Over $1 million has been invested in over 30 projects. Up to a 50-percent matching grant is available to Target Area business or building owners who construct eligible improvements to the facades of their buildings. The City will match dollar-for-dollar an owner's investment in the appearance of their building's storefront facade up to a maximum amount of $20,000 per project.





OBJECTIVE A.19

Foster synergies and enhance connection between the Ohio Wesleyan University (OWU) campus, Downtown and the South Sandusky Street Focus Area.

The City of Delaware, especially Downtown, benefits greatly from the physical campus of Ohio Wesleyan University (OWU). The campus provides both OWU community members and the community at-large with the chance to enjoy the 200-acre campus, including well-maintained buildings (ten of which are listed on the National Register of Historic Places), landscaping and open space and walking paths. Additionally, Downtown Delaware, which is only a two-minute walk from campus, provides students with restaurants, shopping and entertainment in a vibrant setting.

Actions

A.19.1 **Coordinate with campus master planning.** The City should coordinate with institutional uses with campus settings, including but not limited to OWU, that create harmonious landscaping, gateways, furnishings, and walks that present a unified theme that reinforces each particular setting. They should reinforce pedestrian orientation and circulation, provide good transitions along campus edges, and create linkages with the community.

A.19.2 **Ensure campuses do not isolate, but rather foster social and physical connections with the built environment.** OWU has a unique opportunity to connect and transition between Downtown and the South Sandusky Street Focus Area. The City, OWU and citizens should work together to further these connections, physically and socially.

OWU STRATEGIC PLAN

Ohio Wesleyan University continually engages in strategic planning and campus master planning to further advance itself as one of America's premier liberal arts colleges. OWU aims to fulfill its vision and plans as well as raising the University's profile by creating new programming, enhancing the student experience, improving campus buildings and residential facilities, and securing the University's financial future. OWU and the City of Delaware actively engage in a town-gown collaborative process to ensure coordinated and complete communication and to help each entity fulfill goals and objectives of mutual interest.



OBJECTIVE A.20

Update the Zoning Code and development policies to conform to the Comprehensive Plan.

The City's Zoning Code is the primary regulatory means of implementing the future land use recommendations illustrated in Chapter 5. An update to the Zoning Code should include standards that prescribe the form of development as well as allowable uses while rewarding developers who fully comply through decreased regulatory process requirements.

Actions

A.20.1 **Formulate a task force.** A task force should be created in order to develop an approach to zoning changes. This group should include staff from relevant City Departments, representatives from key stakeholder groups and community members. Strong consideration should be given to hiring professional consultants to assist in a community driven process.

A.20.2 **Develop zoning strategy.** The overall approach to updating zoning should be determined, including whether a complete zoning code update is needed or whether a more strategic approach to updates in key parts of the City and/or the creation of overlay districts is best. The strategy may be partly dependent on the outcomes of Area Plans. (See Actions 4.1 and 5.1.) Depending on the timing for creating such plans, zoning code updates may need to be done in phases. This could include streamlining development review processes.

BEST PRACTICES IN ZONING CODES

A common shortcoming of traditional zoning codes is that they emphasize separation of land uses and prescribe little direction for the appearance of development. Contemporary zoning codes that are intended to implement a character-based land use plan will place a high emphasis on the form of development such as building design characteristics and placement on a site. In these codes, regulating specific land uses is often secondary. Such "form-based" standards or codes have been adopted in various degrees by communities of all sizes as a flexible way to carry out their visions for a vibrant built environment while fostering predictable results for both developers and residents. It is also not uncommon for a hybrid approach to be pursued with form-based standards underpinning a more conventional code.

A.20.3

Assess potential form-based approach. While the specific zoning approach to be pursued requires further assessment, it is clear that the current code needs to be more consistent with approved planned developments and commercial/industrial development plans. The City should explore the incorporation of form-based standards. Such standards would naturally follow the Development Type descriptions provided in this plan, which address not only land use but character, intensity and design. Form-based standards can be useful to communities because they can clearly indicate the type of development intended using easy-to-understand illustrations and tables.

A.20.4

Assess potential of a Unified Development Ordinance. The City should consider if a Unified Development Ordinance (UDO) is appropriate. A UDO combines into one document traditional zoning and subdivision regulations, along with other City regulations, such as design guidelines, sign regulations, and floodplain and stormwater management. A UDO can improve the efficiency of the development process and can focus on the quality of development, without the normal distractions of the bureaucracy of approving development. Development standards do not change, but the process is streamlined, with zoning and subdivision processes more closely integrated. The City is effectively doing this in many cases already by combining process and cases and encouraging applicants to submit items concurrently. Formalizing this approach while decreasing some of the steps involved may prove more efficient and effective.





The City of Upper Arlington merged development regulations and procedures through a Unified Development Ordinance into one unified code thereby simplifying the development process, streamlining administration procedures and practices, and creating a more user-friendly review and approval process for developers. Development along Lane Avenue in Upper Arlington, which was partially enabled by the UDO, could serve as a model for Delaware's corridors.

A.20.5 **Implement preferred Zoning Code change.** Once the zoning strategy noted in A.20.2 is determined, the zoning code changes should be made in accordance with the City's standard regulating process.

OBJECTIVE A.21

Align the Capital Improvement Plan (CIP) with the Comprehensive Plan.

The Capital Improvement Plan (CIP) presents the City's capital investments for a five-year planning period and is required to be updated annually as part of the City's budget process. In order to connect the specific recommendations in the plan to funding, it is important that the CIP reflect the objectives of the Comprehensive Plan and integrate the most and time-sensitive important priorities. This will help ensure that the focus remains on implementation of the plan especially for long term capital intensive projects.

Actions

A.21.1 **Review and revise CIP.** The first next CIP following adoption of this Plan should incorporate the plan's recommendations, including anticipated development in the Focus Areas. Subsequent updates should also align with plan recommendations, as well as key recommendations that may developed as part of an update to the plan.



GOAL B: ADVANCE ECONOMIC PROSPERITY

Provide economic opportunity for all residents and support diverse, successful and resilient business and industry.

OBJECTIVES

B.1 Prioritize target industries and businesses.

B.2 Strengthen relationships between the City and economic development partners in the region and State.

B.3 Capitalize on the Delaware Municipal Airport.

B.4 Support small and medium-scale businesses and encourage entrepreneurship.

B.5 Support growth of the tourism industry.

B.6 Support workforce development.

B.7 Maximize benefits from economic incentives.

B.8 Improve economic development opportunity in the Southwest Focus Area.

OBJECTIVE B.1

Prioritize target industries and businesses.

The City should continue to prioritize attracting and retaining target industries and businesses in accordance with the current Economic Development Plan.

Actions

B.1.1

Continue to conduct marketing and recruitment. The City's Economic Development Plan identified target industries and businesses including boutique manufacturers, research & development, other professional, scientific & technical services, finance & insurance, wholesale trade, information services and specialty aftermarket automobile businesses. Secondary targets were also identified, mainly as an approach to fill the gap in available jobs in Delaware in these sectors, including retailers and arts, entertainment, and recreation employers. Current marketing and recruitment efforts should be sustained and enhanced.



Continued development along and near Sawmill Parkway presents an opportunity for new target industry growth.

B.1.2

Create strong economic development brand. The City should pursue marketing for economic development as put forth in the City's Economic Development Plan. This should include online marketing, public relations, branded collateral and relationship building efforts as described in the Plan. Implementation of the completed Southwest Wayfinding and Branding Plan is also a critical component of this action.

B.1.3

Advance infrastructure into Focus Areas when possible. This action should be in accordance with the City's Thoroughfare Plan and fiscal sustainability goals. It may involve promoting public-private partnerships to maximize investment, share costs, and promote development opportunities.

OBJECTIVE B.2

Strengthen relationships between the City and economic development partners in the region and State.

The continued development of a strong and diverse economic base for the City and all of Delaware County is enhanced when all of the entities with this responsibility work together in a cooperative environment. The City should seek to establish and/or maintain collaborations with economic development partners with similar goals in order to align policies.

Actions

B.2.1 **Continue work of the Delaware Area Chamber of Commerce economic development advisory team.** The City of Delaware is actively involved with the Chamber including its economic development team. Participation should be continued so that the City can remain informed and active in identifying and addressing issues of community and regional concern.

B.2.2 **Continue participation in the Mid-Ohio Development Exchange (MODE).** The City should continue its membership and involvement in MODE in order to participate in information-sharing and identify opportunities for collaboration with others in the region.

B.2.3 **Establish a Community Improvement Corporation (CIC).** The City should consider establishing a CIC that can effectively serve as a Citywide Economic Development Council to support development of vacant and underutilized land and promote economic development objectives. A partnership approach with the Delaware County agencies should be established to maximize and coordinate efforts in this region.

CURRENT AND POTENTIAL FUTURE PARTNERS

The Delaware Area Chamber of Commerce serves the needs of the business community in Delaware County, including within the City of Delaware. It provides a range of programs and services benefiting our members by promoting and advocating a favorable business climate, quality of life and the orderly growth and development of the Delaware area community.

The Mid-Ohio Development Exchange (MODE) is a membership group of local economic development organizations throughout the 11-county Columbus Region. MODE provides programming to increase awareness of economic development issues, resources, and best practices with the goal of strengthening and growing local economies.

Community Improvement Corporations (CICs) are quasi-governmental non-profit corporations authorized under the Ohio Revised Code (ORC). There are two types of CICs: traditional CICs for economic development, as well as CICs organized as County Land Reutilization Corporations (County Land Banks).

B.2.4

Continue participation in One Columbus. One Columbus is the economic development organization for the 11-county Columbus Region. As a member, the City supports a range of initiatives focused on attracting and retaining business to Central Ohio and supports its economic competitiveness.

OBJECTIVE B.3

Capitalize on the Delaware Municipal Airport.

There is an opportunity to focus on the airport as an asset for attracting business and aviation assets to the area. Certain types of economic activities are attracted to locations near general aviation airports. These activities provide a basis for planning and economic development associated with the airport and surrounding areas.

Actions

B.3.1

Develop a recruitment strategy for industries that benefit from airport proximity. The City should generate a plan for attracting certain companies. The focus should be on the following opportunity areas.

- Extensive and immediate travel needs. There are several types of manufacturing companies that have employees with extensive and immediate travel needs that are met through direct proximity and access to private planes. Among the types of companies that form a target base for recruitment in southwest Delaware are consulting, law, medical, advertising, and financial services firms, transportation services companies, agri-businesses and executives and boards of manufacturing companies, particularly those engaged in electronic equipment manufacturing, miscellaneous machinery manufacturing, and other selected industries.
- High-attention marketing. Certain firms require a high-level of personalized attention for their clients as well as frequent visits by clients and potential customers. These firms have a high demand for private, general aviation services.
- General aviation freight. There are several types of manufacturing companies that tend to utilize the services of general aviation airports on a regular basis because of the type of product or specific requirements for distribution. The factors and types of manufacturing businesses associated with high general aviation freight use are critical needs (medical emergencies and supplies); high-value product (high-tech electronic) equipment and parts, medical equipment, precious stones; and perishables (seafood, fruit). General aviation is also needed for businesses such as aircraft manufacturers, repairs, and outfitters.
- Specialty aviation contractors and businesses.

B.3.2

Support recommendations of the Airport Master Plan, Facility Plans, and the Strategic Business Plan. The Delaware Municipal Airport (DLZ) is a public-use airport owned by the City of Delaware. The airport is situated on approximately 325 acres and is about 2 miles southwest of Downtown Delaware. The FAA designates the airport as a Regional-General Aviation airport. It is denoted as a State of Ohio Level 1 facility. Currently the airport is home to about 100 based aircraft and handles an estimated 39,900 operations per year. The runway is approximately 5,800 feet after an expansion during the last planning period. The City completed an airport Master Plan in 2006. Recently, the city has produced an update to that plan called the Airport Strategic Business Plan, January 2020 that should work in conjunction with the facility planning required by the FAA. The Strategic Business Plan should be advanced for formal adoption. Thereafter, its recommendations should be implemented in support of the objective to capitalize on the municipal airport.

DELAWARE MUNICIPAL AIRPORT

Delaware Municipal Airport Jim Moore Field is a leading Central Ohio general aviation facility. It is home to approximately 100 aircraft and handles an estimated 40,000 operations per year, including corporate activity, training and pleasure flying. The City oversees all aspects of the airport. The airport is strategically located to serve the region, including commercial centers in Delaware, Dublin, Westerville and Powell. The City has aggressively pursued airport enhancements that include an expanded 5,800-foot runway and the Wide Area Augmentation System (WAAS), allowing precision approach for horizontal and vertical navigation. Other upgrades include a grooved runway and improvements to the flight terminal, lounges and weather briefing areas. (Source, City of Delaware, http://www.delawareohio.net/about-the-airport/)



B.3.3

Establish a Delaware concierge airport hub. A "Concierge Airport" hub associated with the airport should focus on providing corporate and personal services that would appeal to the target clientele identified in Action B.3.1. For example, a partnership could be formed with the nearby YMCA and other regional institutions with amenities to provide member access to fitness facilities for those using the airport. On-site business and personal services would also be made available that are targeted to companies using the airport facilities.

The City's Economic Development office should examine opportunities for creating transportation, construction, and electronic equipment manufacturing and distribution clusters relating to recruitment of airport-dependent businesses. Economic Development should also identify institutional, government, and corporate partnerships in establishing technology anchors such as an incubator, associated with the airport. The focus of the anchor would be to recruit entrepreneurs and small tech businesses in the transportation, construction, electronic or medical equipment arena that could be nurtured locally and graduate into larger spaces in the industrial park.

OBJECTIVE B.4

Support small and medium-scale businesses and encourage entrepreneurship.

In addition to the larger industrial and corporate employers, Delaware benefits from small and medium-scale businesses that generate employment, provide goods and services and support the local economy. There are existing programs trying to address this issue, such as through the Delaware Entrepreneur Center, that should be built upon.

Actions

B.4.1 **Expand small business infrastructure and incentives.** Delaware's business infrastructure should be enhanced including soft programs or incentives (fast-track, financing, training, and technical assistance) as well as "hard" infrastructure (e.g., affordable building space and broadband infrastructure) to accommodate the needs of "location-independent businesses" like IT consultants, web designers, and artisans.

B.4.2 **Develop an entrepreneur mentorship/ partnership program.** Existing industrial businesses contract with a variety of suppliers and services, and there are opportunities for expanding mentorship and partnership programs that match large businesses with emerging entrepreneurs.

B.4.3 **Broaden Planned Business Overlay Zoning District.** The City should broaden the Planned Business Overlay Zoning District (or a new such district) to include retail and services uses to provide a flexible zoning tool to accommodate large or unusual retail development projects. Planned Mixed Use Districts (PMUs) could also be used to provide flexibility while also ensuring a high design standard.

DELAWARE ENTREPRENEURIAL CENTER

The Delaware Entrepreneurial Center is a partnership of City, County, and Ohio Wesleyan University. The Center's mission is to create a collaborative, innovative, and imaginative space that facilitates value creation and professional development.

It includes rentable office spaces, a shared work area for center members, a conference center with digital meeting capabilities, and educational programming to support entrepreneurial understanding and success.

The Center has been so successful that it is already at physical capacity. This demonstrates the purpose and need as well as the importance of this facility. The university and its partners are discussing the opportunity to address the need for additional space as a result.

B.4.4 **Create a pop-up retail support program.** Establish a pop-up retail program that could be associated with the existing Delaware Entrepreneur Center. A program to provide technical assistance could help to give entrepreneurs important business advice to make pop-up retail possible. (This could address needs in areas deemed food deserts until more permanent businesses can be attracted to these areas.)

B.4.5 **Provide trainings on other non-traditional financing options.** While many small businesses may be challenged to receive a loan from a conventional bank, other financing options may be available. Training sessions provide an opportunity for entrepreneurs to learn about both ways to improve chances of receiving a bank loan as well as alternative funding sources.

B.4.6 **Implement entrepreneurship recommendations as stated in the Economic Development Strategic Plan.** The plan's recommendations support entrepreneurship as an employment and economic development driver.

OBJECTIVE B.5

Support growth of the tourism industry.

The tourism economy within the City has grown in recent years and has additional potential. The City's traditional Victorian-era downtown and presence of Ohio Wesleyan University are draws for day trippers as well as out of town visitors. In addition to the rich, historic architecture, the City also offers arts opportunities and historic venues such as the Strand Theatre, the oldest continually operating cinema in the US. The City has many dining opportunities and vintage businesses like The Hamburger Inn Diner that add a local flavor to the City's offerings. Recent branding efforts undertaken by the City have also helped to build on the City's heritage as a foundation for growth.

Actions

B.5.1 **Create a tourism development plan.** The City and Convention and Visitors Bureau should work with partners who can assist in guiding the process as well as contribute resources. This may include local organizations and businesses, Delaware County, and foundations. Once funding is identified, a consultant should be hired to manage the process of creating the study. The consultant will work with key stakeholders in preparing the strategy, including the City and County, Convention and Visitors Bureau, Chamber of Commerce, Main Street Delaware, Delaware Historical Society, Ohio Wesleyan, the Methodist Theological School in Ohio, and local businesses and artists.

B.5.2 **Implement cultural arts strategies.** Enhancing the City's cultural arts offerings has potential to bolster tourism. Actions to support the cultural arts as described in Goal E.

B.5.3 **Establish a welcome center.** A welcome center in the former Engineering Department building (20 E. Williams Street) has been established with a local partner Main Street Delaware and should be supported to full build-out.

EVENTS AND FESTIVALS

Numerous events and festivals support the tourism industry in the City and can be the basis for a more strategic approach to tourism industry development.







OBJECTIVE B.6

Support workforce development.

Companies tend to follow the workforce in a tight labor market such as is anticipated in the future in central Ohio, so attracting a workforce—especially younger, well-educated and skilled people—helps in securing opportunities for business development. If directed toward current residents, workforce development also supports local employment. Delaware lacks the necessary labor pool (un/semi-skilled and skilled production workers) to support industrial growth beyond the amount that already exists. Key issues relate to the lack of services and amenities, housing, and the environment that is created around industrial zones for attracting workers to Delaware.

Actions

B.6.1

Strengthen ready-for-work programs. Local businesses have identified a serious deficiency in workforce readiness, soft skills and essential skills. While there are efforts underway to close this gap, there is a need for more program operating resources in this area as part of the City's business retention and expansion efforts. The City should work closely with area colleges, state vocational / technical training programs (including at the Delaware Area Career Center and Columbus State's Delaware Campus programs), and local manufacturers to ensure that labor supply issues are being addressed.

B.6.2

Expand workforce-oriented transit. There is a need for better transit or public transportation to get workers to their places of employment. These types of activities are typically coordinated with service providers such as Delaware Transit, Damascus Staffing, COTA, Uber, and MORPC. New partnership opportunities are available with emerging initiatives such as SHARE and COTA Plus. Related actions as specified in Goal E should be pursued.

B.6.3 **Increase the amount of workforce housing.** While many units exist today, local employers and other community members have expressed a need for more attainable workforce housing to attract and retain quality workers in Delaware. Actions as specified in Goal D should be pursued to address this action.

B.6.4 **Conduct and periodically review analysis pertaining to Workforce of the Future.** In alignment with City Council's goal to increase professional, managerial, administrative and highly technical jobs in the community, continue targeting high growth industries such as technology, research and development and those based on the knowledge worker. Delaware City and County's demographics continue to be highly educated, so connecting the existing residents and local universities with these businesses as they increase in the community will be critical in realizing this action. This action should include preparing a detailed market analysis and periodically reviewing and updating it to ensure this and other actions align with longer term changes in the marketplace as well as any subsequent changes to workforce needs.



Continued efforts to align educational and training opportunities with workforce needs will strengthen the City's economic position.

B.6.5 **Expand mentorship programs.** Mentorship programs should be developed for school and college students, pairing them with local businesses. The Point at Otterbein could potentially serve as a connector between individuals seeing mentorships and businesses in need of assistance. The current Delaware Entrepreneurial Center—a collaboration between the City, County, and OWU—could help fulfill this role.

OBJECTIVE B.7

Maximize benefits from economic incentives.

The City has had success in using economic incentives and should continue to utilize these tools. At the same time it is essential to provide clarity, transparency and efficiency in granting economic incentives and align these with Comprehensive Plan's Plan Goals, Objectives, and Actions. Creating a base-level of understanding regarding the cost and benefit of every economic development project to a school board and City Council helps in decision-making, accountability and shared understanding of why certain decisions are made.

Actions

B.7.1

Implement Economic Development Incentive Policy (EDIP). The City has an Economic Development Incentive Policy that has not yet been formally approved but is used for general guidance. It should be passed as a living document (can be adjusted over time) so that implementation can be prioritized and aligned with Plan Goals, Objectives, and Actions. The incentives relative to economic incentives contained therein should then be pursued, including recommendations to expedite, review and improve the process.

B.7.2

Link incentives to fiscal return requirement. Using a fiscal return analysis as described in Action A.3.1, the City should continue to require that projects receiving economic assistance meet minimum fiscal returns. This is consistent with the EDIP. It is worth noting that some exceptions, as outlined in the EDIP, could be considered for targeted startup and higher risk companies that align with the Economic Development and Comprehensive plans' goals and objectives.

ECONOMIC DEVELOPMENT INCENTIVE POLICY (EDIP)

In 2014, the City developed an Economic Development Incentive Policy that incorporates incentive guidelines, formulas and processes in one document. It has been updated several times since then. The purpose is to maximize incentives while also achieving maximum return on investment (ROI) for the community leading to greater wealth for all. Partner organizations included the City of Delaware, Delaware City School District, Olentangy School District and Delaware Area Career Center. The EDIP is currently under consideration.

B.7.3 **Continue to use CRA and tax abatements.** These tools are part of the basic set of incentives offered by most communities in Ohio and throughout the nation. The City will continue to offer them to qualifying businesses whose proposals are consistent with the Comprehensive Plan, Economic Development Plan and EDIP. The EDIP addresses how they will be utilized in a formulaic and return-on-investment based approach.

B.7.4 **Continue to work with Delaware County and the State to structure incentives.** The City is a partner with Delaware County and the State of Ohio in structuring incentive packages that utilize County or State funds, including tax abatement agreements. The City will continue to work with its partners (such as Delaware County Finance Authority, Community Improvement Corporation, One Columbus and JobsOhio) and will coordinate projects within its corporate boundaries.

B.7.5 **Support Joint Economic Development Districts (JEDDs) where appropriate.** Joint Economic Development Districts (JEDDs) in association with neighboring townships. should be pursued and supported where they support the City's land use and economic development policies.

B.7.6 **Pursue TIFs where appropriate.** TIFs may be pursued in selected locations to allow for a more cost-effective and partnership-based approach to infrastructure development while ensuring development continues to pay its appropriate share of costs.

JOINT ECONOMIC DEVELOPMENT DISTRICT (JEDD)

JEDDs are special purpose districts that are created between a combination of municipal corporations and townships. One or more municipal corporations and one or more townships may enter into a contract to create a JEDD. The purpose is to facilitate economic development. They allow for the levying of a district-wide income tax and the provision of municipal services in unincorporated areas. See Chapter 6 Fiscal Sustainability for an explanation of the City's use of JEDD.

OBJECTIVE B.8

Improve economic development opportunity in the Southwest Focus Area.

The Southwest Focus Area is comprised of a combination of industrial and business uses. The focus area is important to the City as an employment base and has many assets, but also has significant unrealized potential that should be capitalized on. The Delaware Industrial Park is within this Focus Area and it is one of the oldest and most established industrial areas in the City. Existing businesses must be protected and retained while allowing for improvements, innovations and compatible new uses. The Central Industrial Area, also in the Focus Area, is an undefined area of central/southwest Delaware that includes several industrial businesses and related activities plus a residential neighborhood. The area has significant potential as a mixed use district that may include industrial, office and other uses, including potentially workforce housing. Finally, the Delaware Crossing Business District (Sawmill District) and area south and southwest of this district includes thousands of acres potentially available for development. The area would benefit from a focused planning effort in order to develop a shared vision for its future.

Actions

B.8.1

Implement strategies to diversify the economic base. There is a need to continue to diversify the City's economic base and the business base within the southwestern portion of Delaware. Diversification and balance helps reduce or mollify the impacts of a downturn in any one sector. This also helps to address changes to the macro marketplace. Diversification can also lead to collaboration and new product development, where diverse companies work together to share technologies for example on open platforms. The City should prepare strategies for diversification that build off the Economic Development Plan and the City's existing strengths. Those strengths include its central location and its clusters in transportation and construction. As described in Objective B.3, another key strength is Delaware's airport as a marketing anchor for recruiting the types of businesses identified above that are attracted to general aviation airports. (Enhancing the airport's services and "perks" will increase its competitiveness and the business recruitment potential for southwestern Delaware.)

B.8.2

Create a Southwest Area Plan. As described in Chapter 5, an Area Plan should be created for the entire Southwest Focus Area (larger than the map on the following page; see Chapter 5 for a complete map) in order to more specifically address land uses and the physical environment through a process that engages property owners, business owners, employees and others. This should include exploration of desired mixed-use development. The following components should be included (See map on following page):

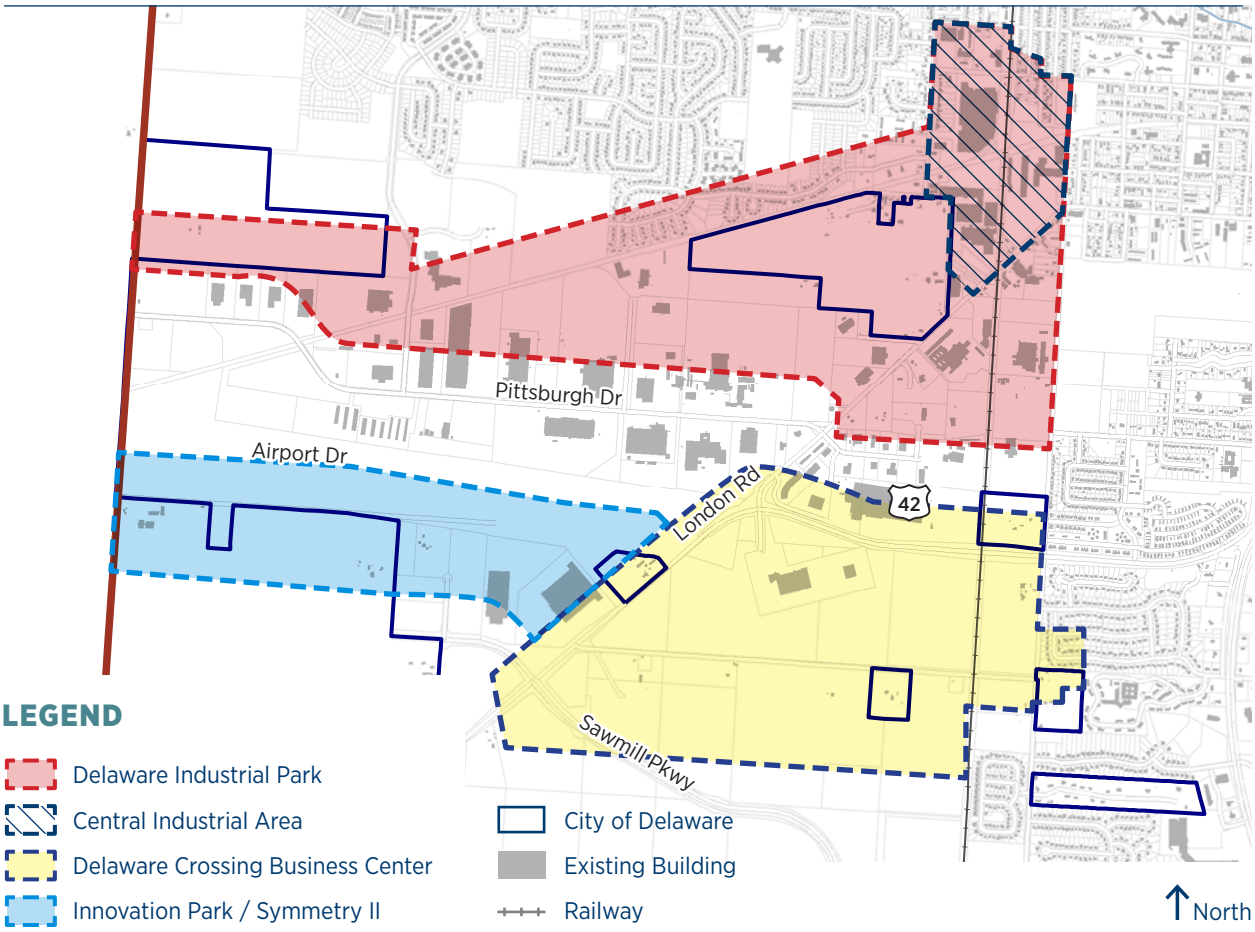


EMS Adhesives has remained in the City of Delaware, adapting over time, including consolidating operations into one, new building.

- **Central Industrial Area.** This area is the least defined of the existing industrial zones. There is an opportunity to create a more urban, mixed-use district that provides amenity value and positively supports the surrounding residential neighborhoods. It would focus on enhancing the aesthetic appeal of the area overall including improving streetscapes along the London Road Corridor to Sandusky Street, and along Curtis Street.
- **West of U.S. Route 42: "Tech/ Business."** The area west of U.S. Route 42 is already developing as a mini-business park area, incorporating Innovation Park and Symmetry II. There is an opportunity to build on the industrial technology testing cluster and to promote advanced manufacturing in this area. The area could benefit from branding and services associated with the "Concierge Airport" concept, since it is situated adjacent to the airport property and could potentially offer a south entrance to the airport.

- **"Amenity Node" at Sawmill and U.S. Route 42.** Development of a mixed-use node at Sawmill Parkway and U.S. Route 42 is recommended to provide amenity value to this southwestern "corner" of the City in support of both residential and economic development. A mixed-use node at this location would also provide a southern "gateway" into the City's existing industrial business area. The node would offer convenience and shopper's goods retail, personal services, and restaurants if proven to be supported by the market. There is also the possibility of integrating workforce residential development into the node and establishing an attractive environment that would attract workers to live in the area.

MAP OF KEY AREAS WITHIN THE SOUTHWEST FOCUS AREA



- East of U.S. Route 42 "Corporate" Corridor. The portion of the Sawmill District east of US Route 42 would have a more "corporate" business park character, although it would still accommodate a mix of uses and would need to appropriately transition to residential (perhaps workforce housing) in the far southern and eastern portions since residential development predominates in Liberty Township to the south along Sawmill Parkway. The City would help facilitate site assembly by working with area property owners, similar to the effort recommended in the Central Industrial Area. Light manufacturing and back office administrative service uses could be among the types of businesses recruited to this area. Recruitment targets would include management consulting services in human resources, marketing, and process management; as well as firms engaged in logistics and associated consulting, consistent with the types of companies likely to locate near a general aviation airport. The district would have consistent character and design throughout, with branded elements and marketing.

FLEX OFFICE

Flex office space includes flexible employment uses, including the mix of retail, service, and other commercial development along major streets and highway corridors. The classification targets existing strip centers, "Big-box" stores, drive-thru restaurants, and/or similar auto-oriented commercial uses along major thoroughfares. Flex loosens the use requirements along these corridors to encourage redevelopment or re-use of existing buildings and combat vacancy through incorporation of office and light industrial uses. The Flex classification increases permissible density and height restrictions with an emphasis on high quality design of buildings, grounds, and landscape. Flex districts seek to limit access through consolidated intersections and improve pedestrian connectivity between and across parcels.

B.8.3

Create an infrastructure plan. The City has completed discreet pieces of infrastructure plans, but there is not one coordinated and consolidated plan for all components. As part of the area plan for the Southwest Focus Area, the City should develop a detailed infrastructure plan to support office / commercial uses, small manufacturing, housing, amenities and greenspace. To promote fiscal sustainability, public-private-partnerships and cost sharing should be pursued.

B.8.4

Create southwest business consortium. Important to diversification of the economic base in the Southwest Focus Area (as per Action B.8.1) is the need for collaboration, including institution building and partnering among and between businesses in the area. Creating a southwest Delaware business consortium that promotes cross-pollination of ideas between businesses should be pursued. This consortium might also provide the opportunity for more interaction between consumers and production, such as through food & beverage as well as the "maker" culture that brings an audience and consumer appetite for local products. A key focus would be on how the area can respond to greater demand for new industries, including technology-oriented companies.

B.8.5

Create strategy to attract resident employers. The Economic Development Plan identified a need to recruit businesses that employ local residents, since there is significant out-migration of residents and reverse in-migration of workers to Delaware (as noted in Chapter 3, Existing Conditions and Trends). Several specific industries are recommended to augment the target industry effort, including the following:

- Management Services;
- Scientific & Technical Services, with a more specific emphasis on Industrial Testing, which could be recruited to the southwest area; and
- Finance & insurance back office processing and services.

The work should be coordinated with a strategy to bring additional, varied housing to the area to help support targeted industries and existing businesses.

ECO-INDUSTRIAL PARK

An eco-industrial park is a group of businesses that strive to enhance environmental and economic performance through sharing and collaborating the management of energy, water and waste.

B.8.6 **Brand the area.** There are opportunities to enhance recruitment power by strengthening the Southwest Area's brand and identity. This effort would build off the overall branding work for the City conducted in 2014. It should be marketed in association with the transportation and electronics industrial sectors, since these sectors are represented by clusters that suggest a competitive advantage for the area in attracting those industries. A name that reflects the changing nature of the area, a graphic identity and key messages would add value. The branding should be tied to efforts to improve the physical environment of the area, including delineating districts and nodes and enhancing amenity value to create more “cache".

B.8.7 **Create sustainability targets.** In an effort to demonstrate leadership in sustainability, the City should identify metrics and standards for integrating sustainable development practices into the area. It will be important that such measures do not reduce competitive advantage of developers or businesses, but complement and enhance marketability.

B.8.8

Create Activity Districts, gateways and physical improvements. The City should define and strengthen commercial and Mixed Use Activity Districts, enhance gateways and make other physical improvements as described in Chapter 5. More specifically for this area, the following is recommended:

- Better define and strengthen commercial/Mixed Use Activity Districts along London Road at the intersections with Pittsburgh Drive and at U.S. Route 42 West. These nodes can help focus attention so that the area does not seem as disparate and ill-defined.
- Enhance the image along the London Road corridor so that it has a character and image that is equally attractive to Pittsburgh Drive.
- Create a sense that one has entered a more deliberate, master-planned area, to enhance the image of this corridor and the sites and buildings adjacent to it. Gateway features and signage should build off of the 2014 City branding work and be unique and consistent within the Delaware Industrial Park area, especially along London Road and within the Activity Districts.
- Introduce landscaping and moderate buffering at the key locations (such as between heavier industrial and residential uses) to help "upgrade" the image of the area and enhance the overall aesthetic context.

B.8.9

Assemble sites. The City should continue to work with property owners to facilitate a collaborative, shared-equity based site assembly strategy among private property owners that helps to create a more coherent collection of parcels for development or redevelopment. Some specific steps to achieving this could include:

- Examining the market and investment potential for use of these sites and to develop a request for proposals from developers on behalf of the owners, who could work in a shared equity arrangement with a prospective developer or user (public-private partnership); and
- Creating an infill development strategy focused on recruiting compatible uses along London Road. As part of this strategy, the City would work to define heavy industrial areas that are protected from encroachment through zoning and other regulatory mechanisms.



Liberty Casting Company facility on Liberty Road.

B.8.10

Integrate new uses at key locations. In addition to the physical improvements described in Chapter 5, the City should protect industrial uses but integrate commercial and residential uses where appropriate to create mixed use environments. The Southwest Focus Area is relatively close to downtown Delaware and could become one of the City's exciting, mixed use urban neighborhoods while supporting the existing neighborhood. New uses could be concentrated in a "signature" mixed use node located at London Road and Liberty Road. The Howald Industrial Park could be redeveloped for mixed use, potentially beginning with the sizeable, undeveloped parcel at the front of the Park, pending favorable market conditions. A use such as a microbrewery or small-scale distillery could complement the mix but should not adversely impact the adjacent, long-standing neighborhood. There is also the opportunity to integrate rental apartments or other residential into these mixed-use nodes.

BREWERIES AND DISTILLERIES

One of the possible opportunities for integrating commercial / industrial "maker" uses into the Central Industrial Area would be through food and beverage facilities including a small-scale brewery or distillery. A microbrewery, along with restaurants, could help establish a hub for residents and workers in southwest Delaware and could also attract other consumers from throughout the City and beyond.

B.8.11

Convert office to maker/tech space. Low-performing office space in the area could be converted to use by makers, small tech firms, particularly those originating from the adjacent neighborhood entrepreneurs. This space might provide an opportunity for move-up among incubator firms or small companies looking for affordable start-up space in the area, including those originating in other parts of the northern Columbus market. Amenities will help in marketing this space, especially for small start-ups, makers, and entrepreneurs. In association, a neighborhood entrepreneurial center may be explored in this area or along

THE MAKER SPACE AT THE POINT

The Point at Otterbein University is a maker space in Westerville, Ohio, that is made up of five creative spaces for community members. The Maker Space has a design studio, woodshop, metal shop, computer lab and an advanced manufacturing lab. Community members can utilize the many machines and resources to create their own projects.



GOAL C: BUILD SOCIAL COHESION AND EQUITY

Foster Delaware's sense of community across geographies, income categories and demographic groups and provide stable foundations for a high quality of life.

OBJECTIVES

C.1 Make new residents feel welcome.

C.2 Recognize diversity.

C.3 Foster a sense of citywide togetherness and pride.

C.4 Support aging in place.

C.5 Empower residents to engage in civic life.

C.6 Support equity in health outcomes.

OBJECTIVE C.1

Make new residents feel welcome.

Many Delaware residents feel great pride in their community and a strong sense of belonging. As new residents move to Delaware from elsewhere, it will be important to welcome them into the community so that they develop the same sense of attachment and feel accepted.

Actions

C.1.1 **Create and distribute welcome packets.** Through a partnership between local businesses, HOAs and neighborhood or civic associations, welcome packets could be assembled and provided to new residents. The welcome packets could include community, local business and other information of interest for people who have recently moved to Delaware, including information about basic regulations and permits. There should be an emphasis on creating a citywide sense of belonging and pride.

OBJECTIVE C.2

Recognize diversity.

Delaware's population is mostly Caucasian but includes residents of all ages, income levels, races and ethnic groups. The percentage of minorities is also increasing. (See Chapter 3 for a summary of key demographic trends in the City.) Reflecting broader regional demographic changes, the City has been attracting more individuals with a country of origin outside of the United States. It also has been physically growing and includes two school districts. In order to build a stronger and more accepting community, the City should embrace and recognize this diversity.

Actions

C.2.1 **Organize implicit bias trainings.** Government agencies, community organizations, school administrations and others may benefit from opportunities to collaborate and participate in training aimed at fostering an understanding of how implicit bias and cultural insensitivity can adversely impact certain segments of the population. This should include a focus on residents of different races, ethnic backgrounds, nationalities and sexual orientations.



A recent community art project resulted in a mural on the existing Ross Street building, owned by the City.

C.2.2

Conduct a research initiative focused on ways to acknowledge the history of underrepresented populations. Organizations such as the Delaware African American Heritage Council and the Delaware County Historical Society have worked to raise awareness about the African American experience and to support the County's (including the City's) African American population today. A research initiative focused on ways to commemorate, recognize and/or preserve the heritage of minority populations should be pursued. Its outcomes could be a list of historic preservation priorities, historical markers, public art and/or virtual means of acknowledging the important contributions that minority groups have made to Delaware.



C.2.3

Hold heritage festivals. Delaware residents enjoy many festivals and special events. Organizing entities, in partnership with the City, should organize heritage festivals designed to bring an appreciation for different cultures and traditions to the community. Downtown has traditionally been the location of such events, but neighborhood-specific activities could also be encouraged. It may be beneficial to partner with cultural organizations based in Columbus or other larger cities.

C.2.4

Prepare a diversity, equity and inclusion plan. The City should hire an independent consultant to assist with creation of a diversity, equity and inclusion plan. The plan will explore past and current efforts. A commission on diversity and inclusion could be explored as a possible outcome to implement the plan.

OBJECTIVE C.3

Foster a sense of citywide togetherness and pride.

Many Delaware residents have a desire to build relationships across neighborhoods, school districts and geographic areas. Fostering these connections will improve pride in the City and commitment to working together to address shared interests. This can lead the community to celebrate the uniqueness of areas and people while promoting a singular Delaware Together ethos and broader community frame of mind.

Actions

C.3.1

Continue City newsletter. The City's quarterly newsletter serves as a source of information on topics of importance to people who live and work in the City. This resource could be expanded over time and incorporate specific information aimed at promoting a sense of citywide togetherness.


CITY OF DELAWARE

Progress Report

Fall 2020

CITY OF DELAWARE QUARTERLY NEWSLETTER

Countering 1-2 Punch of Virus, Flood with Relief for Businesses

City Eyeing Covid's Impact on Income Tax Revenue

City Hall hopeful the effect may be less than originally feared

Midway through 2020, the City of Delaware is seeing a decline in income-tax revenue due to the coronavirus pandemic, but City Hall is hopeful the impact may be less than originally feared.

Income tax collections, which make up 64 percent of the City of Delaware's general fund portion of its budget, totaled $9,595,031 through the end of July. This reflects a decline of $238,154 or 2.4 percent from the same period in 2019.

Finance Director Justin Nahvi attributed the drop-off to the rise in unemployment which began in March when the economy was largely shut down due to the virus.

A later income tax filing deadline for tax returns, delayed from April 15 to July 15, resulted in more income-tax revenue collected later in the year.

"We had an incredible rebound in July. That is especially good news" Nahvi told the City Finance Committee at its September 1 meeting.

Due to the July rebound in tax collections, City leadership determined that mid-year appropriation adjustments would not be required. It also lowered its budget gauge condition reading from "Budget Restraint" to "Elevated Monitoring."

Please see TAX, Page 3.

INSIDE

A One-Of-A-Kind Year, Already

Diversity, Equity and Inclusion

Let's Play Nine More!

The City's newsletter is a tool that can be used to advance a sense of togetherness and pride.

C.3.2

Host annual civic leadership awards. A citywide awards program would celebrate leadership in the community and could be geared toward both individuals and organizations. An event, organized by the City in collaboration with community partners, such as OWU, could bring people together and could serve as a fund raiser for community initiatives. It would support a sharing of information about people who have positively contributed to the City and in so doing would foster greater pride in and across all parts of the community.

C.3.3

Recognize homeowner and neighborhood improvements. A program should be created to recognize home improvements or maintenance efforts. This will encourage pride in homeownership and one's neighborhood. Initial focus could begin with individual homeowner recognition expanding to larger neighborhood awards. Ancillary activities such as an annual trash clean-up day could be organized. Local leaders could be selected as part of the reviewing committee for awards.

C.3.4

Implement programs to make Downtown comfortable for all. Downtown is the community's gathering place and center of civic life. It is a place where the entire community should feel comfortable and welcome. Main Street Delaware and other City organizations should collaborate to ensure marketing and activities reach and the entire City population. Organizations should also work together to advance other actions that are a part of Goal C in this plan as they relate specifically to Downtown (for example, Action C.2.3, Hold heritage festivals). There should also be a strong emphasis on accessibility for all.



Events downtown should consider cultural programming that and focus on opportunities to make sure all feel welcome.

OBJECTIVE C.4

Support aging in place.

Older adults in Delaware have special needs that must be met if they are to feel welcome and safe. Actions can be taken to proactively address physical and social barriers for them and to make the City a place where they can thrive.

C.4.1

Create an age-friendly strategy. As the number of Delaware residents over the age of 65 grows, citywide guidelines for aging in place can help to ensure that the community is safe, comfortable and appealing to older adults. An age-friendly strategy for the City should be developed that aligns with and builds off similar Countywide efforts. (See sidebar on next page for details.) Elements of this strategy might include guidance on changes that can be made to homes based on mobility issues, as well as transportation, recreational amenities, social needs and other topics that emerged as important through the community planning process. The strategy would help in determining where to direct public resources. The City should continue to work closely with SourcePoint, the Delaware Public Health District and other partners.

AGE-FRIENDLY COMMUNITIES

The World Health Organization and AARP Livable Communities established eight domains or focus areas to organize the work of making a community more Age-Friendly.

- Outdoor Spaces and Buildings
- Transportation
- Housing
- Safety and Emergency Preparedness
- Social Participation, Respect and Inclusion
- Employment and Civic Participation
- Communication and Information
- Community Support and Health Services

For more information, visit www.aarp.org/livable-communities

C.4.2

Support Countywide age-friendly initiatives. Age-Friendly Delaware County is a local initiative led by the Delaware Public Health District aimed at creating a community in which residents of all ages can lead happy, healthy lives. The City should actively participate and support these ongoing efforts. This should also include collaborating with SourcePoint and the Delaware Public Health District.

C.4.3

Research multigenerational housing models. Models from throughout the country demonstrate an emerging trend of housing that brings people together across generations. Many different arrangements have proven successful. Benefits may include increasing attainability by providing cost savings, increasing social interactions, and improving safety, among others. Multigenerational housing may be designed to accommodate family units or others who are not part of the same family but desire and would benefit from such arrangements. They can include sharing an individual home, or living within the same duplex, multifamily complex or other single-family development. Increasingly, social services, programming and/or communal design features are integrated into multigenerational housing.

AGE-FRIENDLY DELAWARE COUNTY (AFDC)

Age-Friendly Delaware County's mission is to collaborate to innovate and improve key elements of livability that support healthy aging in our community. The Age-Friendly Delaware County process is guided by a framework provided by the World Health Organization (WHO) and is part of a national network facilitated by AARP. AFDC decided to focus on 6 domains of livability-Housing, Transportation, Community Engagement, Community Health & Safety Services, Outdoor Spaces & Buildings, Communication & Information. The County completed an assessment in 2018 and is currently in year three of the five-year cycle in becoming an age-friendly community, which includes completing an age-friendly plan, implementing it and reassessing it every five years. Based on survey results and assessment, The AFDC Action Plan has 27 strategies and 82 action steps all specific to Delaware County and its residents. The plan can be viewed at: mysourcepoint.org/age-friendly.



SourcePoint, located in the City's southeast area, is a multifaceted senior center that offers a broad range of services and programs including in-home care services adult day care, chore services, emergency response systems, homemaker services, Meals on Wheels, medical transportation, mental health counseling, nursing services, personal care, respite care, and more.

OBJECTIVE C.5

Empower residents to engage in civic life.

A strong community will depend on the active involvement of residents in civic life. Actions should be taken to lower any barriers to involvement and foster a sense of commitment to government and organizational activities. This should include efforts to enhance diversity in both employment and involvement on a volunteer basis.

C.5.1

Create a forum for continued engagement in long-term community planning. Using the Delaware Together Steering Committee or an expanded platform, create an ongoing committee or forum for community input into long-range planning issues. The group would meet periodically to provide input on City policy and needs. They would also act as City champions or ambassadors to reach out to the community to obtain input and spread success stories. There could be multiple groups or task forces established to help with implementation of this plan's action items, potentially organized around the plan's goals or key topics.

C.5.2

Prepare principles for equitable engagement. The Planning & Community Development Department, in collaboration with neighborhood representatives, should prepare a set of principles to promote equitable engagement across demographic groups and neighborhoods. These principles could be utilized in planning processes throughout the City to help create a more level playing field for all who wish to be involved. Particular attention should be paid to groups who are traditionally underrepresented in planning processes.



A community process led to the creation of a mural on Andrew's House in Downtown Delaware that speaks to community ideals around social cohesion and togetherness.

C.5.3

Create a council of neighborhoods. A council of neighborhoods is an umbrella organization that would consist of representatives from Delaware's various neighborhood groups or formal neighborhood associations. Liaisons from each of the City's elected ward geographies or neighborhood associations would meet regularly to share information and ideas, and to collaborate on initiatives for common benefit. The council would also work with the City and other agencies to advocate on neighborhood issues, provide an effective forum for bringing such issues to public attention and promote implementation. It will be important to bring representatives together at least annually to foster a sense of togetherness between people from different neighborhoods.

C.5.4

Develop mentorship opportunities. The City Departments should collaborate to develop shadowing, mentorship, or internship opportunities for students to learn about employment opportunities both with the City and with local businesses. An internal mentorship program could include re-establishing a formal Youth in Government program with Delaware City Schools and the Olentangy Local School District.



OBJECTIVE C.6

Support equity in health outcomes.

Community public health has been a major focus area for the City during the recent COVID-19 pandemic. But even beyond the impact of acute public health emergencies, there is strong evidence that environmental, social and other factors impact individual health risks and outcomes (known as social determinants of health), and that these factors vary across any given population. The Delaware Public Health District and others have conducted numerous studies and plans focused on public health. This plan supports these recommendations through collaborative work and also specifically calls out priority actions that can be undertaken at the citywide scale.

Actions

C.6.1

Integrate data and recommendations from recent health assessments and related studies into planning and public policy. To create long-term healthier communities, planners, design professionals, engineers, developers, and public health professionals need to work together to address health needs and disparities. Recent data collected by the Delaware Public Health District makes a strong case for taking action in mental health and addiction, food insecurity, obesity and physical inactivity, and several other critical areas for the County. The City should work closely with the Health District and partners to integrate data and recommendations in these studies and plans into ongoing planning, policymaking and implementation strategies.

KEY HEALTH-RELATED STUDIES AND PLANS

At the countywide level studies and plans focused on public health include the following:

- Community Health Assessment (2017)
- Community Health Improvement Plan (CHIP, 2019)
- Healthy Eating, Active Living (HEAL MAPPS, 2019)
- Age-Friendly Assessment (2018)
- Community Profiles (2019)

For more information visit www.delawarehealth.org/data

SOCIAL DETERMINANTS OF HEALTH

Social determinants of health describe the relationship between conditions of place and their ability to influence a wide range of personal health outcomes. Examples of these conditions include safe housing, access to education, availability of fresh food, and quality public services. Local communities that pursue strategies that improve homes, schools, and workplaces, can promote better health for their residents and enhance quality of life.

C.6.2

Identify pedestrian improvement projects. Through zoning, building codes, planning, and policy, Delaware can make physical activity like walking and biking an easier choice. The City has a Complete Streets Policy and a "Safe Walks Program," a sidewalk improvement initiative to provide safe pedestrian routes in all City neighborhoods. This program should continue as the primary way in which to identify and implement minor sidewalk improvements. At the same time, area plans proposed in this plan should include a sidewalk strategy that focuses on a high standard for sidewalk connections in both existing and proposed new neighborhoods. The City is also on the second adopted version of the Bicycle and Pedestrian Master Plan (2017). This plan should be updated regularly and its recommendations should be implemented including by developers as developments are planned.

DELAWARE COUNTY HEALTH MAPPS

To understand the impact that obesity and food insecurity has on our residents, OSU Extension and Delaware Public Health District conducted a participatory obesity and food insecurity study for Delaware County. Community members mapped features of the built environment using the HEALth MAPPS process (Healthy Eating Active Living: Mapping Attributes using Participatory Photographic Surveys). It identified and described food insecurity issues in the County. The City should consider this work as it relates to the City and identify opportunities to collaboratively address challenges identified with the Delaware Public Health District.

For more information visit http://arcg.is/K01i5

C.6.3

Develop marketing strategy for parks targeting disadvantaged and minority populations. In order to promote the City's parks to a broad spectrum of individuals, and to demonstrate that all are welcome, the City should create and implement a strategy to encourage the use of parks by all segments of the population. This could be implemented in association with recommendations regarding other general efforts to make parks inviting and accessible.

C.6.4

Adopt policies to address obesity and help alleviate food deserts. In 2018-2019, OSU Extension and Delaware Public Health District led important research on obesity and food insecurity in Delaware County. (See Delaware County HEALth MAPPS sidebar on previous page.) The work resulted in eight final recommendations for the County. Each recommendation should be considered relative to the City of Delaware and specific actions identified in order to advance them. The recommendations are:

- Create an orientation guide to food resources
- Offer diabetic friendly options (or label) at food pantries
- Offer diabetic education cooking class
- Install signs to warn drivers of walkers
- Install a safe crossing between Aldi and Meijer grocery stores
- Add more fresh produce at food pantries
- Invite residents to participate in meetings of the coalition working on this initiative.



The Second Ward Community Initiative's community garden provides the opportunity for residents to grow vegetables.

PITTSBURGH'S 412 FOOD RESCUE PROGRAM

The mission of the 412 Food Rescue is to prevent good food from entering the waste stream by redirecting it to those in need. The organization that manages the program partners with food retailers, volunteer drivers and nonprofit organizations to connect surplus food with individuals and families who are experiencing food insecurity.

C.6.5

Prepare public health emergency information sharing strategy that derives knowledge from the COVID-19 pandemic. The Delaware Public Health District has collected and made available via its website (delawarehealth.org/covid-19) resources relating to the recent COVID-19 pandemic, including information about testing, school/facility closures, businesses, travel restrictions and more. A hotline has also been created. Over time, it is anticipated that recommendations and regulations will change and that the resources the community needs will evolve. However, the disease is expected to continue to impact Delaware for the foreseeable future and the City's responsiveness to similar situations in the future should be adjusted to take into account what has been learned. The City has a page on its website where COVID-19 information is shared that could serve as a model for information-sharing with community members in the future, particularly those in vulnerable demographic groups (e.g. the elderly).



GOAL D: PROMOTE HOUSING QUALITY AND VARIETY

Ensure a broad spectrum of housing options to meet the current and future needs of the population.

OBJECTIVES

D.1 Provide more attainable housing.

D.2 Provide more affordable housing

D.3 Diversify the housing stock.

D.4 Maintain and protect housing value and character.

D.5 Foster open communication with the building industry.

D.6 Enhance linkages between housing and amenities.

D.7 Encourage housing investment downtown.

OBJECTIVE D.1

Provide more attainable housing.

Meeting the housing needs of existing and potential residents, including workers at Delaware's manufacturing and business facilities, is a priority. Addressing the need for attainable housing will ameliorate the cross-commutation patterns (number of people working in Delaware but living elsewhere because they cannot afford to live there and vice versa) that characterize Delaware's labor market. It will also help to make Delaware a more complete community with a population that is diverse in income levels.

Actions

D.1.1 **Provide incentives for attainable housing.** Regulatory incentives such as density bonuses or expedited review could be used to promote redevelopment of existing residential areas with promise for attainable housing (based on property values, house size and location). Incentives should be coordinated with the City's Economic Development Incentive Policy (EDIP).

D.1.2 **Integrate workforce housing into plans for the Southwest and Southeast Focus Areas.** As these areas are further developed, attainable housing should be part of the development in the Southeast and Southwest Focus Areas to accommodate potential workers.

D.1.3 **Provide grants, incentives and other financial support to maintain existing attainable housing.** One of the most effective strategies for maintaining affordable / attainable housing is to ensure that existing stock remains in good condition. The City and housing advocates should lobby for State and Federal grants for improvements to existing affordable / attainable housing. Incentive programs (working with key partnership entities such as Community Development Corporations and Community Development Financial Institutions) could also be explored targeting key neighborhoods or areas.

DENSITY BONUS

A density bonus provides an increase in allowed dwelling units per acre (DU/A), Floor Area Ratio (FAR) or height which generally means that more housing units can be built on any given site. It's a tool that's often used to achieve certain community goods (e.g. attainable/affordable housing or more open space) in exchange for greater density.

D.1.4

Create a housing upkeep community education program. This program would be designed to encourage the maintenance of current housing stock by spreading awareness of available tools and programs (such as Federal and State loans). It could be coupled with a recognition program for beautification (e.g. annual awards) that acknowledges property owners with awards for maintaining attractive properties. It can be used to keep housing that might otherwise deteriorate in decent condition, helping to preserve attainable housing.

D.1.5

Review zoning requirements to identify changes that could support "missing middle" housing. The City should review its zoning code to determine if there are opportunities to encourage more missing middle housing (such as duplexes, fourplexes, cottage courts, and multiplexes) especially in appropriate Focus Areas such as the Southeast and Southwest to improve transitions between uses.

ATTAINABLE PRODUCTS

"Attainable" housing has been defined by the Urban Land Institute as housing that meets the needs of those with incomes between 80-120% of the Area Median Income. However, other definitions can also be used. Key products include:

- More rental apartments, preferably those built in mixed-use or walkable formats that are well-integrated with the community;
- Higher-density single-family development, such as in the form of townhouses, vertical mixed-use, and 0-lot line developments;
- Cottage-style communities, which include smaller units, duplexes and quads with smaller yards but high amenity value through shared open space, recreation amenities, and walkable development patterns;
- Rehabilitated existing housing in older neighborhoods within the city (could be leveraged through incentives and infrastructure investments).



The term "Missing Middle" was coined by Daniel Parolek of Opticos Design. Missing middle housing is "a range of house-scale buildings with multiple units—compatible in scale and form with detached single-family homes—located in a walkable neighborhood." Many communities throughout the country, including Delaware, have recognized that providing more missing middle housing can assist in meeting increase demands for housing that is in a walkable environment and serves shifting demographics, including both younger and older populations seeking less maintenance and access to amenities.

D.1.6. **Provide incentives for missing middle housing development.** Developers can be incentivized to construct missing middle housing through targeted support. The City provides tax abatements for housing developers within certain targeted zones in the City, such as the Downtown. However, such incentives are subject to State policy as well as to constraints in the City's budget. Incentives, such as density bonuses, might only be applied to projects of a certain scale and housing price, restricting use of the policy to a small number of units and thereby limiting its fiscal impact.



New multifamily housing north of U.S. Route 36/State Route 37 and south of Bowtown Road responds to growing regional demand for rental housing.

OBJECTIVE D.2

Provide more affordable housing.

In addition to attainable housing that is targeted to moderate income households, there is also a need in Delaware to support the provision of affordable housing targeting low-income households. This housing provides a critical safety net for people who are experiencing financial hardship and is especially important in light of the ongoing challenges caused by the COVID-19 crisis.

D.2.1 **Continue to work with community organizations.** The City should continue to work with non-profit community organizations to provide affordable and transitional housing, not only for the financially challenged but also for physically and developmental challenged individuals. The City should continue to actively participate in the Delaware County Housing Alliance. This will be an ongoing activity.

D.2.2 **Study homelessness.** The City and its partners should conduct a study of homelessness and recommend appropriate strategies. The study should be conducted in collaboration with the non-profit housing community to achieve an accurate, realistic picture of the extent and nature of the problem. It should suggest practical, implementable and approvable solutions.

D.2.3 **Provide grants, incentives and other financial support to maintain existing affordable housing.** Strategies similar to those described in Action D.1.3 should be pursued specifically to support affordable housing. The City might also encourage façade repairs to residential units by establishing a grant program to facilitate rehabilitation.

OBJECTIVE D.3

Diversify the housing stock.

Encouraging the retention and construction of a variety of housing types will help the City to attract new residents and accommodate the existing population as preferences and needs change over time. This will create a more robust housing market and provide the choice in lifestyles that will continue to make the City desirable in the upcoming decades.

Actions

D.3.1 **Support senior and multigenerational housing.** The City worked to bring to fruition the senior affordable housing project Riverside Landing at Delaware Place. The City should continue to work with for-profit and non-profit housing providers to facilitate the development of senior housing that is consistent with the policies of the Comprehensive Plan. In addition, the City should support appropriate multigenerational housing products. This work should be conducted in association with creating an age-friendly plan for the City. (See Objective C.4.1.)

D.3.2 **Support "empty-nester" housing.** Some empty nesters of the Baby Boom generation are moving "down" (with respect to house size) within the Delaware market while others are moving to Delaware from other parts of the Columbus region, including more rural areas, in order to downsize and be closer to medical and other services. There is overlap in the types of housing in demand among this cohort with other attainable housing. (See Objective B.1).

AGING-IN-PLACE STRATEGIES

Aging in place strategies allow people to live in their place of choice while maintaining a high quality of life as they age. These strategies help to plan and overcome challenges relating to health, social and emotional needs to maintain a well-rounded lifestyle. Strategies should provide resources and amenities for the aging population in the community to encourage an improved quality of life.

Ensuring that housing accommodates older adults should be a cornerstone of any such strategy. Ideal housing products for this cohort include condominiums (especially two-bedroom / two-bath condominium units, according to brokers), 0-lot line developments, and "cottage homes" or small-lot single-family units in HOAs or similar shared maintenance arrangements. As this population cohort ages, then efforts will need to ensure that housing remains accessible, since the vast majority of seniors prefer to "age in place" rather than relocate to independent or assisted living developments.

D.3.3

Attract master planned developments with a mix of housing types.

Delaware can position itself as a more competitive community of choice for young professionals, families and others by avoiding “cookie-cutter” housing development, and encouraging more walkable developments that incorporate some mix of uses. Where possible, new communities should be integrated seamlessly with existing neighborhoods but not in a way where drivers are “lost” within cul-de-sac developments that are indistinguishable from each other. Delaware has the opportunity to attract master-planned development that offers a mix of single- and multi-family housing (including "missing middle" housing types) along with commercial uses in a walk-able environment. This is especially important in the Southeast and Southwest Focus Areas.

D.3.4

Support traditional neighborhood development (TND) in the Southeast.

The Southeast Focus Area is well-suited for a traditional neighborhood development (TND) with its accessibility to employment and shopping nodes to the south around Polaris and Dublin and "backbone" road network as planned. TND in this location would need to be amenity-rich and offer a mix of housing products (single-family detached, duplexes, quads, apartments, condominiums, residential-over-commercial townhouses and cottage homes), along with Community-Scale Activity Centers as defined in Chapter 4. Ultimately, this will provide Delaware one of its best opportunities for attracting housing to meet the needs of young professionals, empty-nesters and others seeking alternative housing types.

D.3.5

Allow for smaller units on smaller lots in proximity to Downtown and in other selected locations. Cottage-style communities, which include smaller units with smaller yards are becoming a popular product not only as an affordable alternative but also for empty nesters and others looking to lower maintenance costs. Some areas close to Downtown, including the Riverfront and Near East Side Gateway Areas, are an appropriate location for such infill development. This would complement opportunities for rehabilitation of existing housing in these neighborhoods within the City by either for-profit developers or nonprofit entities. These development types should also be considered, where appropriate, in the Southwest and Southeast focus areas.





Delaware has many examples of high quality, smaller scale new housing that can serve as examples for future developments.

D.3.6

Create toolkit for increasing executive / high-end housing. There are opportunities to encourage housing to meet the needs of executives and professionals, such as those who commute into Columbus/Polaris/Dublin or who might establish offices in a newly branded Sawmill District corridor. The previous comprehensive plan indicated a need for this housing type, a need which still exists into the current planning period. The toolkit could include a number of components aimed at reducing costs and producing economies of scale for smaller niche housing developers. This may include one-stop design approvals (Action D.3.8).

D.3.7 **Implement cost sharing on utility extensions.** Within certain targeted areas, which would need to be further defined, the City could partner with builders who build specific, desired housing and require utility extensions to their projects. Such partnerships might be predicated on housing sales price, size or other requirements that meet the City's objectives to encourage a specific housing development type by reducing the marginal cost burden that is currently borne by small builders.

D.3.8 **Implement one-stop design development and approvals.** "Fast-tracking" or "green taping" approvals can target developers, areas, and development types that are desired. This would minimize costs associated with development permitting.

D.3.9 **Define and permit a wide range of housing types in the Zoning Code.** An update to the City's Zoning Code should include definitions for a range of housing and other building types, their design characteristics and their appropriate land use context. This can help support desired missing middle housing as described in Action D.1.5. Residential development intensity could be determined by design characteristics such as building type, height, distance from the street, location along arterial roadways, architectural variety and streetscape features (form-base characteristics) rather than by units-per-acre alone.



The Terra Alta subdivision, which was approved in March 2020, includes elements of a conservation subdivision.

D.3.10

Allow mixed housing types within new neighborhoods. While the City's current zoning classification "planned mixed use overlay (PMU)" allows for flexibility in neighborhood design with multiple housing types, the PMU process is more involved than a conventional zoning district. An update to the City's Zoning Code should build off the Suburban Mixed Residential Development Type presented in Chapter 4 of this plan and clearly define criteria for mixed or "traditional" neighborhood development and allow such development through a standard approval process. This can help support desired missing middle housing as described in Action D.1.5.



Delaware's traditional neighborhoods include a range of housing sizes and styles, allowing for different preferences to be met. This idea of housing variety within the same area can also be applied to new developments.

D.3.11

Ensure quality rental apartments. The City of Delaware has a higher proportion of rental housing than the County. However, the housing market analysis has identified a potential need for additional rental housing in the future due to increased demand. The need for more rental housing dovetails with the need for more attainable housing generally as well as changing demographics for home ownership. New rental units could help to retain and attract recent graduates entering the work force or employees at Delaware's manufacturing and other industrial facilities, many of whom cannot otherwise find affordable, new single-family detached housing in the City. While the City must appropriately balance rental with for sale housing, quality of rental housing should also be a priority regardless of rent rate. Several actions can be taken to incentivize the amount and kind of rental housing that is available, including providing incentives for rehabilitation (Action D.3.12), incorporating rental housing into area plans for Focus Areas (Action D.3.13) and licensing rental properties (Action D.3.14).

D.3.12 **Provide incentives for rehabilitation.** Incentives could encourage rehabilitation of existing rental housing stock so long as it meets certain requirements and is brought fully up to current standards. Such incentives could help leverage improvements and upgrading to existing stock to enhance its overall competitiveness.

D.3.13 **Incorporate rental housing into area plans for Focus Areas.** As area plans are developed for the Southeast and Southwest Focus Areas, specific numerical targets and potential locations should be identified for new rental housing. To the extent possible, rental housing should be integrated with owner-occupied housing and should include missing middle housing types.

D.3.14 **License rental properties.** A rental registration program can assist in addressing some identified issues as well as facilitate code enforcement efforts. Such a program could require landlords to register rental properties before leasing them as well as assist the City in code enforcement efforts related to rental property. The City could provide inspections to ensure that properties are well-maintained, compliant with codes, and safe for habitation. The program should be designed to minimize the burden on and expense to responsible landlords.



Neighborhoods like the East Side have housing stock in a variety of conditions. Investment in housing on these areas will help to provide a greater variety of quality, attainable options.

D.3.15 **Conduct survey on first time home buyers' housing choice.** A survey of people who have chosen and have not chosen to live in Delaware (but instead opted to live in other similar communities in central Ohio) could be instructive in understanding what qualities of the community factor into housing choice. This could assist the City, realtors, the development community and key policy makers to understand what housing types, amenities, employment opportunities, costs and/or other considerations play a role in determinations about where to live. The survey could be re-conducted periodically to account for changing market conditions.

D.3.16 **Implement relevant recommendations from the Mid-Ohio Regional Planning Commission's 2020 Regional Housing Strategy.** The City should review and identify recommendations from the study that should be supported through policies, programs or projects. A Local Housing Action Agenda should be undertaken with MORPC as a next step.

OBJECTIVE D.4

Maintain and protect housing values and character.

Current and potential future residents of Delaware desire to live in neighborhoods that retain high quality housing. This is important both to maintain housing values and to preserve existing character.

Actions

D.4.1

Continue code enforcement. Violations of code should be addressed in order to require property owners to maintain housing stock to a high standard. This will involve property maintenance as well as Zoning Code issues.

D.4.2

Discourage unsympathetic changes to successful existing neighborhoods. The preservation of existing housing stock that contributes positively to neighborhoods, especially in areas with a high concentration of attractive housing like the Northwest Neighborhood, should be a priority. New construction that is vastly different in scale and/or character should be avoided.



Renovating older homes helps preserve the character of existing neighborhoods while advancing fiscal and economic sustainability goals.



Entry feature of the new development Ravines of the Olentangy.

OBJECTIVE D.5

Foster open communication with the building industry.

Continuing to build the strong relationship between the City and the building industry will help to support clear communication and the sharing of ideas about critical development issues in the City. This should include, but not be limited to, coordination with the Building Industry Association (BIA) of Central Ohio.

Actions

D.5.1 **Establish a city-builder work group.** A city initiated and led work group of City Staff and builders should be appointed to create an open line of communication. The work group would include the region's builders and developers to introduce the City's regulatory process and to ensure an open line of communication on issues of concern to the building community. Members of this group should include several of the region's more active custom (smaller-scale, boutique) builders, including those that have not had extensive building experience within the City.

OBJECTIVE D.6

Enhance linkages between housing and amenities.

Planning and constructing housing that allows for easy access to services and amenities will help Delaware to continue to differentiate itself as a community of choice in central Ohio. This will require both innovating with respect to new housing and fostering connections between existing housing and amenities.

Actions

D.6.1 **Incorporate Community-Scale Activity Centers into new residential neighborhoods when possible.** As indicated in the presentation of the Southeast and Southwest Managed Growth Areas in Chapter 5, new residential areas should include nodes with commercial, civic and other uses that provide amenity value. This can help to market potential new residential development, reduce the need for car travel and improve the quality of life of residents.



Integrating community amenities within residential developments allows for easy access without requiring additional trips by car.

D.6.2

Explore opportunities to enhance neighborhoods through well-connected street networks and walkable blocks. The City's land development policies should be reviewed relative to their ability to promote development that utilizes a street pattern of walkable blocks with minimal use of cul-de-sacs. Specifically, opportunities to increase connections to adjacent neighborhoods should be explored including retrofitting existing neighborhoods to provide connectivity. Preferences for neighborhood streets to include sidewalks on both sides of the street should continue to be expressed.



Connecting new residential development with sidewalks promotes travel by foot.

OBJECTIVE D.7

Encourage housing investment Downtown.

Delaware's historic downtown is attractive for those seeking a small-town lifestyle and walkable amenities. Historic architecture and unique destinations (the Strand Theater, Hamburger Inn Diner, Buns Restaurant, and a myriad of other shops and dining establishments) form part of the appeal. Overall, Downtown Delaware provides a "sense of place" that is very attractive and has potential especially to capture the millennial / Generation Z and empty nester markets. This includes targeted sites in the Riverfront District and South Sandusky Street areas.

Actions

D.7.1

Facilitate land assembly. The City should facilitate land assembly by working with property owners to package land and buildings that will support residential investment. A City Community Improvement Corporation (CIC) could prove especially useful in this effort.

D.7.2 **Integrate expanded areas into Downtown.** Integrate expanded areas into the traditional Downtown area as noted in this plan and consider opportunities to intensify uses in selected adjacent areas including permanent residences.

D.7.3 **Establish a tax increment financing (TIF) district for the Downtown and part of the Riverfront and South Sandusky Street areas.** A TIF district can be used as a mechanism for funding site-specific infrastructure improvements. This tool will serve as an incentive to encourage investment in new construction and substantial rehabilitation that may trigger infrastructure upgrades. It must be linked to an appropriate public infrastructure project, such as a parking garage.



There is great potential for housing areas in close proximity to Downtown like the Riverfront and South Sandusky that will attract residents for its proximity to Downtown's amenities.

D.7.4 **Market Downtown to investors.** A marketing package should be prepared that promotes the Downtown to residential investors and builders. This should include information on incentives, potential sites and demographics. Site tours should continue to be conducted by City Staff with potential investors and builders as requested.

GOAL E: LEVERAGE RESOURCES, INFRASTRUCTURE AND AMENITIES

Preserve and enhance key historic buildings and neighborhoods, natural areas and open spaces, transportation and mobility options, and quality facilities and services.

OBJECTIVES

E.1 Continue to build city-schools relationship.
E.2 Enhance parks and open space.
E.3 Preserve natural environments.
E.4 Enhance the urban tree canopy.
E.5 Protect water quality.
E.6 Bolster the public art scene.
E.7 Preserve and reinvest in valued historic buildings, features and neighborhoods.
E.8 Reduce energy demand.
E.9 Create better roadway and vehicular connections throughout the City.
E.10 Support multimodal transportation (bicycles, pedestrians and transit).
E.11 Improve trash and recycling service.
E.12 Provide safe and sufficient water and sanitary sewer facilities.
E.13 Enhance fire services and safety.

OBJECTIVE E.1

Continue to build city-schools relationship.

The quality of schools is of paramount importance to the quality of life of residents and in marketing housing in Delaware. Since the last comprehensive plan, the relationship between the schools and other City departments has strengthened. Real Estate Agents, property Brokers, and others who had input into the generation of this plan agreed that good schools are one of the factors that contribute to the decision that people make to choose to live in Delaware over other communities in central Ohio. The City should continue to build upon its strong relationship with the schools to increase the City's competitiveness as one of the region's most desirable communities.

Actions

E.1.1 **Continue collaborations between City staff and local school districts.** The City should build upon relationships with local school districts (Delaware City, Olentangy and Buckeye Valley). This should include continuation of existing work groups and collaborations between City staff and School officials, and also representative Council members, housing developers and business leaders. School needs and tax issues will be proactively addressed. The City should support the Districts on planning and bond issues to fund capital facilities and programs. Local business partnerships with Delaware Schools should be enhanced and expanded.

GROWTH AND IMPROVEMENT IN DELAWARE AND OLENTANGY SCHOOLS

Since the last comprehensive plan was completed, the Delaware City School's population growth and strategic investments in programs and facilities have led to a significant increase in students as well as a number of new and improved facilities. The City has seen an annual increase of around 100 students per year for more than twenty years and the trend is expected to continue. The reputation of the school system has been enhanced and a greater number of students are now benefitting from the schools than ever before. The Olentangy Local School District (OLSD) covers part of the City of Delaware and portions of the planning area within the utility boundary of the City in the southwest, south, and southeast. The District scores at the top of many metrics including having three of its four high schools (the 4th being too new to rank) ranked in the top 20 high schools in Ohio by US News and World Report. Multiple levies have been passed over the years by taxpayers to support the schools.

OBJECTIVE E.2

Enhance parks and open space.

The City's existing public and private parks and open spaces are key amenities that support a high quality of life. Their benefits for recreation, environmental quality and public enjoyment have been well-supported through the comprehensive plan process. This includes the preservation and enhancement of existing parks and open space that are accessible from the City's neighborhoods, as well as ensuring accessibility of parks and open space in new neighborhoods to the benefit of potential future residents of these areas as well as the public generally.

Actions

E.2.1

Develop and implement strategic master plan. During 2020, the City worked with a consultant to conduct an assessment of parks and recreational resources. A critical component to implementing a strategic master plan is consideration of renewing the Park Levy (.15% of the total income tax). The Recreation Needs Assessment 2020 should be leveraged for a strategic master plan for Open Space and Recreation that will update the existing plan and identify specific opportunities and recommend actions that should be taken to improve and expand upon existing resources. This plan will also address park and recreational operations. Finally, it should incorporate a Greenway Corridor element / plan as well.



Recreational amenity needs are better understood following the Recreational Needs Assessment 2020 and can provide a foundation for a strategic master plan for parks and open space.

E.2.2

Identify new park opportunities for the Southeastern part of the City. The Recreation Needs Assessment conducted in 2020 found a need for a community-scale park in the Southeastern part of the City. Every predominantly residential segment of the City has a community-scale park except the Southeast. In part, this is because the area is still developing. However, in the long term there should be a concerted effort to identify new parkland opportunities in this area and to better connect residents to existing parks (such as via trailways).

E.2.3

Prepare a riverfront access strategy. As part of the parks and recreation master plan, or as a separate, stand-alone effort, the City should develop a plan focused on how to expand and enhance opportunities for residents to access the riverfront and river. There is a high demand for recreational opportunities along and in the river. A coherent strategy should be developed that explores the breadth of options and recommends key physical and programmatic elements in order to maximize opportunity while protecting environmental quality and ensuring compatibility with other land uses and activities. For example a greenway corridor with bike paths should be established, secured and developed. It should connect and integrate with the larger regional and statewide network.



Throughout the planning process community members identified the river as an underutilized asset.

E.2.4

Revise and improve open space/ parkland dedication requirements for new development. Following the previous comprehensive plan, qualitative standards for parkland dedication requirements were established. However, the requirements should be revisited and revised in order to reflect the most up-to-date thinking about what kinds of parks best serve communities. From a regulatory perspective, establishing a "menu" of options based on type of park would allow for flexibility and a range of acceptable options while providing more explicit direction to the development community, enhancing likelihood of approvals.

E.2.5

Use Level of Service standards to identify need for new recreation facilities. The Recreational Needs Assessment 2020 includes monitoring and quantifying recreational facility needs and demand is needed to understand the Level of Service (LOS) for existing facilities. The City should incorporate expansion of facilities and services as population grows based on an identified standard so that the LOS can guide requirements and needed improvements. This information could also help inform an Adequate Public Facilities Ordinance (APFO) as described in Objective A.5.2.



The 13,000-square foot Mingo Park skatepark was funded through a unique partnership with local businesses and organizations, and through the fund-raising efforts of community youths.

E.2.6

Partner with local public and private institutions with large land holdings to maintain and protect their open spaces. Private institutions (as well as other public entities within the City's borders) often hold significant land that is or could be used as open space. The City should work with institutions to determine what is needed to ensure that these spaces are protected both for the benefit of the institutions and potentially the general public.

E.2.7

Collaborate with the schools to provide neighborhood-level recreation opportunities. The way in which recreational opportunities are provided to the public will be considered as part of the Parks and Recreation Master Plan that is expected to follow from the Recreational Needs Assessment 2020. As part of this assessment, consideration should be given to how schools and the City can work together in providing the opportunities, sharing public resources without duplicating efforts.



Creative approaches to providing neighborhood-level recreation will be considered in future park planning.

E.2.8 **Ensure open space and active recreation provisions in development standards.** Standards for new development currently include standards for open space and active recreation provision. In light of the desire by residents to ensure and better connect open space and active recreation, quantitative and qualitative standards should be provided and better defined.

E.2.9 **Identify new urban natural area opportunities.** Since the previous plan was adopted, community gardens have become very desirable by communities seeking to increase green space, improve environmental conditions, provide for urban agriculture, and more. A proactive plan and strategy for expanding the number of community gardens in the City would benefit this growing interest. This would require working with relevant community groups and neighbors to discuss opportunities, mitigate potential adverse impacts, identify potential sites and form a network of individuals who are interested in helping to coordinate the effort. Pollinator gardens, where appropriate and not likely to cause a disturbance to adjacent property or people, could be included potentially to support bees, butterflies and other insects that sustain these species and the biodiversity they help to support.

PITTSBURGH'S ADOPT-A-LOT PROGRAM

The Adopt-a-Lot Program was established by City Council and implemented by the Department of City Planning to allow residents access to city owned vacant lots for food, flower, or rain gardens.



Image source: https://pittsburghpa.gov/

E.2.10

Expand programming partnership with Preservation Parks of Delaware County. The Recreational Needs Assessment 2020 revealed a strong interest in ensuring that the City maximize its existing park spaces to meet the community's needs of more nature, environment, and outdoor recreation programming. One opportunity identified is to strengthen the relationship between the City and Preservation Parks of Delaware County (PPDC). PPDC performs this type of programming and increased participation could be arranged within the City of Delaware. Ensuring connections and trails between and to City and Preservation Park facilities has also been identified as desirable. The Stratford Ecological Center has been a major asset for the City and Hickory Woods Park on Pollack Road was slated to open soon after the adoption of this plan. Opportunities to continue to expand programming in these and other parks would be of great value.



OBJECTIVE E.3

Preserve natural environments.

Through a combination of managing new development and pursuing policies and programs, the CIty should seek to preserve natural environments and the habitats they support. This should be pursued while connecting and integrating them (where appropriate) to the larger community network.

Actions

E.3.1

Continue river and stream protection measures. The City will continue to promote conservation along rivers and streams through the location of parks and open space, floodplain preservation, requirement of forested buffers, and promotion of conservation easements. This will include continuation of the following policies and programs:

- Public parkland and private open space along the Olentangy River and its tributaries should be acquired/ designated. Park impact fee funds should be set aside to acquire identified natural areas and preserves to protect the resources, provide for their connection to Greenway networks (where appropriate), and integrate them into the larger community.
- Development continues to be strictly regulated within in the 100-year regulatory floodplain. However, it should be recognized that portions of the built urban environment such as Downtown are within this area and should be allowed to continue and be enhanced over time.
- Permanent conservation easements are designated on public and private property along riparian corridors as appropriate and/or concurrent with development.



Coordinated river clean-up efforts help to raise awareness, while building community pride and improving the condition of the river.

RIPARIAN AREA

"Riparian area" means the transition area between flowing water and terrestrial (land) ecosystems composed of trees, shrubs and surrounding vegetation that serve to stabilize erodible soil, improve both surface and ground water quality, increase stream shading and enhance wildlife habitat.

Source: Ohio Environmental Protection Agency

E.3.2

Study the Delaware Run Stream Corridor. The portion of the Delaware Run from approximately Blue Limestone Park east to the Olentangy River is a highly channelized urban stream corridor with development dating back to the founding of the City along it. The entire Run area itself which extends past the western boundary of the City is also an opportunity for a greenway corridor, as per Action A.14.4. For the urban stream section, there may be opportunities to day light sections of the stream that are piped underground today, better channelize the Run to account for stormwater needs, and improve water quality within the Run. There are many existing property owners, businesses and residents adjacent to the Run which need to be allowed to expand, modernize and maintain their established use of property as well. The channelized portion of the Run itself in this area also has areas which need basic maintenance or improvement where the walls of the Run or the piping is in disrepair. As a complex urban channelized stream literally running through the Downtown, this portion of the Run requires specific study from a variety of perspectives in order to balance all the diverse interest and needs, prioritize improvements, determine sections appropriate for day-lighting (if any), determine practical and feasible water quality improvements, and account for basic stormwater management. The City should initiate such a study and proceed with its implementation during the planning period.



Images of the Delaware Run in Downtown.

E.3.3 **Ensure species habitat protection measures.** Revisit landscaping and species listing for permitted plantings to be more specific about excluding invasive species of plants. This will help to provide ongoing balance of the existing natural ecosystems.

E.3.4 **Prepare a detailed inventory and analysis of natural resources.** As a growth management tool potentially as part of the Parks and Recreation Master Plan, the inventory could be used to manage natural resources and limit development impacts. Such a database could include soil classifications, slope, vegetation, species habitat, riparian corridors, water features, and other resources. As part of her graduate studies work, Delaware Together Steering Committee member Stephanie Hauck extensively studied and inventoried natural areas, which could provide a starting point for the work in this action. Her work would integrate information from City Departments and field research within the planning area. This research could be integrated into the City's GIS data and could lead to revised regulations.

E.3.5 **Consider a natural resources zoning overlay district.** A Natural Resources Overlay District could provide compensation for setting aside critical identified land to protect such resources through an on-site density transfer. This would involve amending regulations to permit the transfer within a site of the gross density otherwise allowed by Code, to permanently preserve a portion of a site while allowing increased development on more appropriate portions of a site. This would need to be used only in cases where very high value critical reserves would otherwise be impacted not in association with normal and customary development.

INVASIVE SPECIES

An invasive species is an organism that is not indigenous, or native, to an area or habitat. Many cities have worked to discourage invasive species as new development takes place. In Delaware and the central Ohio region, invasive species such as Honeysuckle and Callery Pear are commonly used non-native species. Honeysuckle is especially problematic in riparian zones. These and other invasive species can change the ecosystem down to the microbial level, impacting aquatic, insectoid, avian, amphibian and terrestrial life. The City has occasionally removed invasive species but sustaining this effort and resource allocation remain significant issues.



The Stratford Ecological Center includes 236 acres of nature preserve and non-profit educational organic farm.

E.3.6 **Create standards for Downtown and Riverfront District development.** As part of a Focus Area Plan for the Riverfront District, the City should develop standards for development that will protect water quality and preserve public access. At the same time the plan should allow development to take advantage of proximity and connection to this currently underutilized resource. These standards can also be applied more broadly to the riverfront areas in the City. This effort should be connected to a riverfront access strategy as described in Action E.2.3.

E.3.7 **Support existing State and City requirements for identified critical wetlands for preservation or mitigation.** While conservation and mitigation of existing wetlands has remained a priority for the City, there is opportunity to potentially incorporate new, pocket critical and identified wetlands. These shallow marsh systems are designed to assist with stormwater management and support biodiversity. They can also serve as a valuable community asset for education if large enough and significant in nature (for example, if they include interpretive signage) and public enjoyment.

E.3.8 **Conduct an anti-litter campaign.** While anti-litter laws are in effect within the City, enforcement can be challenging. In addition to an ongoing effort to improve enforcement, a public education campaign to combat littering should be implemented, in coordination with Public Works, the Police Department, and the Delaware Public Health District. This could include a collaborative City and neighborhood effort to have a one-day clean up, such as a "Clean Up Delaware Day" similar to programs in other communities.



Delaware hosts many volunteer clean-ups, tree plantings and other opportunities for public involvement in environmental stewardship.

OBJECTIVE E.4

Enhance the urban tree canopy.

Delaware benefits from an urban tree canopy in many locations that provides aesthetic value, contributes to shade, reduces the urban heat island effect, provides stormwater benefits and provides natural habitat. Improvements can be made to the urban tree canopy in key locations.

Actions

E.4.1

Maintain and adjust policies and standards for the City's tree canopy. The City has policies in place to help preserve, enhance and maintain its tree canopy. However, specifications regarding ongoing maintenance, tree types and the number of trees in certain parts of the City should be revisited to determine if adjustments should be made. Methods of encouraging alternative site designs to reduce tree loss should also be developed and pursued. Other adjustments may include accounting for new street trees and required on-site trees to count toward replacement trees for any new development. In addition, trees that must be removed due to specific and unavoidable City utility placement requirements could be potentially exempted from the replacement tree requirements.



E.4.2

Prepare an urban forest plan. The Parks and Natural Resources Department should update its urban forest plan. It should be adopted by City Council and updated regularly to address ongoing and future issues. The Plan should outline resources and methods to adequately manage, plan for, and maintain the City's urban forest. Key elements of the plan should include addressing the following:

- Identify and Implement adequate funding for street tree maintenance. This should include examining if an additional monthly amount is reasonable within the stormwater maintenance user fee to fund street tree maintenance activities as street trees provide a direct benefit to stormwater management for the community.
- Ensure adequate width of street tree lawns. The space generally within the right-of-way reserved between the curb and the sidewalk is known as the tree lawn. This is where trees are typically planted. This area should be of a width that allows for good tree health and maintenance as well as minimizes the potential negative impacts on the adjacent public sidewalks.
- Consider changes to sidewalk construction standards. Sidewalk construction standards should also be considered that might help mitigate tree damage while being mindful of overall costs.
- Create a maintenance plan to care for the urban forest through various programs, such as a pruning plan, the removal of hazardous trees, and creating a more diversified tree canopy.

OBJECTIVE E.5

Protect water quality.

The quality of Delaware's water plays a major role in supporting a healthy natural environment for all community members to enjoy.

Actions

E.5.1

Maintain forest buffers along identified streams and tributaries. Forest buffers are important to filtering stormwater, which improves water quality by removing silt and dissolved chemicals that pollute surface water. The City amended its Code since the previous plan was adopted to require buffers. Development was also subsequently required to comply with new Ohio EPA regulations which the City is additionally compelled to enforce. Care should be taken to allow mitigation as provided for in regulations for ditches and minor stream resources while focusing preservation efforts on major identified resources within the regulations. Likewise, existing urban areas should be allowed to remain and reasonable enhancements made such as along the Delaware Run Downtown. (See Action E.3.2.) Code requirements should continue to be met and, where feasible, reforestation should also be encouraged.



Forest buffers along riverfronts help to filter stormwater and protect water quality.

E.5.2

Adopt stronger standards to minimize impervious surfaces. Impervious surfaces (e.g. parking lots, rooftops, driveways, streets) should be kept to a minimum to reduce the amount of stormwater runoff that is generated. This would also reduce the amount of storage required such as for stormwater retention/detention ponds. Green pavement types, reduced parking, decreased pavement widths, where appropriate, and other measures should be considered. The City should adopt standards that allow alternative surface treatments and/or reductions in parking lot requirements (such as a parking space limit). Consideration should be given to emerging management techniques such as rain gardens in the tree lawn. Demonstration projects could help inform the community of these benefits while enhancing the potential for acceptance.



An eco-paver used at an assisted living facility is an examble of a permeable surface that can help with stormwater management.

E.5.3

Potentially integrate lower impact development into new development. The City should encourage Low Impact Development in new development projects. This will help to slow and filter stormwater to protect water quality. Green stormwater infrastructure can utilize natural areas, green spaces and parks to infiltrate stormwater at a neighborhood scale.



Permeable pavement has been installed at Blue Limestone Park helps to manage stormwater and provide numerous environmental benefits.

OBJECTIVE E.6

Bolster the public art scene.

As a complement to the City's vibrant downtown, Delaware boasts a number of high-quality arts-related venues and supports arts-oriented activities, including the Strand Theater, the Ross Arts Museum and the Central Ohio Symphony on the Ohio Wesleyan University campus, the Arts Castle, the Boardman Arts Park and independent galleries. Recent public art, including a series of murals, have also contributed positively to the City. These assets support the cultural arts in many forms and provide numerous opportunities for public enjoyment.

Actions

E.6.1 **Establish an Arts Council.** The coordinated development of the arts is a fundamental economic development strategy and enhances the quality of life of the community. This can be a complex and difficult undertaking. Many communities committed to this idea have utilized an arts council to coordinate and promote the various arts-related activities and events. In Delaware, the Arts Council would work closely with the City, OWU, and schools to implement initiatives. The City could also explore a Percent for Arts Program and could seek and develop outside funding for local arts organizations.

E.6.2 **Designate an Arts District.** An arts district in and potentially around Downtown Delaware would help to promote economic development, support artists and contribute to cultural opportunities in the City. There are numerous arts-related facilities and businesses in the Downtown. A formal Arts District designation should be made as a way of recognizing these facilities, attracting additional facilities, enabling grant and funding opportunities (such as art spaces, galleries, and artist lofts) and marketing the District. Following designation, an ongoing marketing effort should be implemented.



Public art in the City contributes cultural, aesthetic and economic value.

E.6.3

Amend City regulations to allow for and provide guidance on public art. Currently, there is no explicit direction provided for if and how public art can be approved in the City. Clear standards and requirements would assist the City in encouraging and considering new public art particularly in/on public property.



OBJECTIVE E.7

Preserve and reinvest in valued historic buildings, features and neighborhoods.

The City has a strong historic character defined by the Downtown, the neighboring residential districts, and extending east of the Olentangy River into the Riverfront District as well as the Ohio Wesleyan University campus. There are two districts on the National Register of Historic Places (Sandusky Street and Northwest), one area of the City that could meet the criteria to be placed on the National Register (Eastside Historic Area), and one locally designated district (the Downtown and portions of the Riverfront District) under the regulatory authority of the Historic Preservation Commission. There are also numerous individual structures that have been placed on the National Register. Finally, a number of historical markers, statues, murals and other features help to commemorate the City's history.

Actions

E.7.1

Expand the Downtown Facade Grant program. The City's successful Downtown Facade Grant program could be expanded to other parts of the City as an economic development tool. The program could be utilized to promote improvements to commercial properties in other targeted areas, supporting revitalization of these areas while encouraging preservation partnerships. Local funds could be used to streamline regulatory processes and demonstrate enhanced local commitment. The program has been funded to date with federal Community Development Block Grant (CDBG) funds recharacterized from Revolving Loan Funds (RLF).

NATIONAL REGISTER OF HISTORIC PLACES

The National Register of Historic Places is the official list of historic buildings, districts, sites, structures, and objects worthy of preservation in the United States. The National Register recognizes more than 90,000 properties for their significance in American history, architecture, art, archeology, engineering, and culture.

National Register Districts are distinct from local historic districts. Whereas local districts confer regulations that may restrict demolition or significant alteration of contributing buildings, National Register designation can allow property owners to take advantage of Federal Historic Tax Credits, which can be an important financial tool to support economic development and preservation goals.

E.7.2

Review and reassess East Side National Register Nomination or Local Historic District Overlay. A previous (2006) National Register nomination for Delaware's East Side was unsuccessful due to lack of community support. While this may still be the case, expansion of the local district could allow for expansion of historic tax credit opportunities, facade programs and preservation of investment through common and required standards.



Adaptive re-use of historic structures helps to retain the City's character while putting buildings into viable new use, often supporting businesses and the local economy. The church pictured above has been renovated for a an architecture office.

E.7.3

Launch neighborhood preservation workshop program. In association with neighborhood and preservation-oriented organizations, a program should be developed that engages residents in the City's neighborhoods in learning about local historic buildings and places, educating them about the array of tools available to help them care for these assets, and to support them as they take action to ensure their preservation. The program would help in identification of historic assets that are most valued by community residents with an eye toward building neighborhood pride and empowering residents to document and articulate priorities for historic preservation to City agencies and property owners. Of special focus might be places associated with traditionally underrepresented segments of the population, such as racial minorities, immigrants and women. The Northwest Neighborhood Association has been engaged in these practices for many years and could serve a resource and a model for other neighborhoods. This has proven to be an economic development tourism vehicle and way to enhance visitation and spending from people coming from outside of the community.



The preservation of contextual buildings within neighborhoods helps to create distinctive and appealing communities that attracts resident and supports civic pride. Such preservation should also allow for sensitive change over time.

E.7.4

Align private projects with State Historic Tax Credit requests. The City can help facilitate private projects to align with State of Ohio Historic Tax Credit regulations to enhance the economic viability of projects while working to preserve valued structures in an appropriate manner. This could additionally support the expansion of local historic districts where appropriate.



The Arts Castle is an iconic historic structure in the City.

OBJECTIVE E.8

Reduce energy demand.

Many Delaware residents have expressed a strong desire for the City to be a leader in the region for reducing energy demand as a commitment to a sustainable long-term future. A number of specific actions can be taken to support this effort that will require local government coordination with residents and businesses.

Actions

E.8.1

Research incentives for energy aggregation. Sustainable Delaware (a private, local environmental advocacy group) and community members have been researching energy aggregation opportunities for the City of Delaware. City Council has even heard some initial presentations in this regard. Other cities in Central Ohio have successfully implemented such programs, which could be models for the City of Delaware. While the benefits of a program (financial and environmental) have been documented, the specific structure of an effective and appropriate incentive program for the City of Delaware has not yet been developed. The City should work with individuals who are knowledgeable about such programs to determine if and how incentives for energy aggregation could and should be pursued by the City of Delaware. Any aggregation policy should be designed so as to not discourage individuals or organizations from producing distributed energy.

CITY OF WORTHINGTON'S ENERGY AGGREGATION PROGRAM

Aggregation is when a group of customers join together to form a single, larger customer that buys energy for its members. The City of Worthington has adopted an electric aggregation program to lower household electric bills and increase renewable (green) energy usage. After receiving a number of proposals from energy suppliers, City Council entered into an agreement with AEP Energy that is intended to reduce the electric bills of participants and include the use of green energy certificates. Such programs could be a model for the City of Delaware.

E.8.2

Develop a local incentive program for green energy. Green energy includes sources of energy that are renewable, such as wind, solar and hydroelectric. Communities can benefit from increasing their share of green energy, ensuring local environmental benefits including improved air quality, fewer carbon dioxide emissions, decreased long-term costs, fewer service disruptions and the creation of jobs, such as research positions, technology developers and installers. In addition to existing Federal and State incentives, local incentives could be introduced to encourage businesses and homeowners to implement green technology. This program could be tied to a program to encourage green building standards including LEED certification.

E.8.3

Conduct an education campaign for Home Owners Associations (HOAs). Improvements to address energy efficiency are often not well understood, and in some cases not allowed, by HOAs. For example, many HOAs do not allow solar panels. An education campaign should be created involving presentations that are understandable to local residents and supported by data from trusted sources. A task force of interested residents, City staff and others could take leadership for compiling information, scheduling meetings and presentations and providing resources online Relevant industry representatives may be engaged to sponsor and/or assist with data gathering and information. HOAs could revise and align their restrictions to allow for these improvements and work with the City to remove any regulatory barriers to their implementation.





In recent years solar technology has advanced such that it can be added to existing homes without significantly detracting from their overall aesthetics. Above are photos showing the before condition of a house prior to solar panel installation and the condition after installation of panels that minimally impact its overall character.

E.8.4

Identify opportunities for a local Energy Special Improvement District (ESID). Ohio law provides for the creation of an ESID. The ESID provides for Property Assessed Clean Energy Financing (PACE) projects by working with a property owner to develop a plan for projects. The City of Delaware should either identify City-owned property that could benefit from creation of an ESID and/or discuss with developers their interest in creating an ESID for a particular development proposal. The City could identify entire districts that might benefit from this approach as well such as some of the Focus Areas identified in this plan.

PROPERTY ASSESSED CLEAN ENERGY FINANCING (PACE)

The State of Ohio's Property Assessed Clean Energy Financing (PACE) Program can finance investments in energy related improvements in new and existing real estate property, thereby reducing the operating costs of the borrower through energy cost savings. Eligible improvements include heating and cooling systems, roof, insulation, windows, and solar and geothermal projects. The PACE bonds are paid by the property owner with special assessments levied on the project. The program can provide up to 100% fixed-rate financing for a term not to exceed the expected useful life of the improvements.

OBJECTIVE E.9

Create better roadway and vehicular connections throughout the City.

Many improvements have been made to roadways and intersections since the last Comprehensive Plan was adopted. However, many long term roadway improvements remain to be completed. Additionally, with recent and anticipated new development further changes are recommended along with funding and implementation strategies to help plan for the costs of roadway construction and maintenance.

Actions

E.9.1

Continue roadway and intersection improvements, including those recommended in the 2021 Thoroughfare Plan. The City's 2021 Thoroughfare Plan delineates specific roadway and intersection improvements that are recommended in order to facilitate safer and more convenient travel throughout the City while enhancing economic development opportunities. Improvements as indicated in the Thoroughfare Plan should be prioritized in support of the other objectives put forth in this Plan and/or as funding is available. Pedestrian access points and supplemental transit infrastructure opportunities should also be integrated with roadway improvements.

E.9.2 **Implement recommendations of Access Delaware.** The goal of the Access Delaware engagement, planning and research effort, which began in 2018, was to seek input from the community on transportation challenges facing the City of Delaware, and also to get the public's thoughts on why the 2016 'Moving Delaware Forward' levy for street maintenance and transportation improvements did not succeed. The initiative delineated what a future initiative should do if it is to move forward. There are many initiatives and recommendations stemming from Access Delaware that should move forward, including consideration of a road levy to secure resources needed for roadways to be fiscally sustainable.

E.9.3 **Consider adopting a Road Impact Fee.** A road impact fee charge covers the cost of off-site road improvements necessitated by new land development. In 2018, the City conducted an Impact Fee Assessment and identified a potential road impact fees for its potential to strengthen the fiscal position of the City in light of anticipated continued population growth and development and needed capital projects as a direct result.

RECOMMENDATIONS FROM ACCESS DELAWARE

For future initiatives to move forward, they should adhere to the following guidance from public input:

- Adopt a 'Fix it First' approach to maintaining existing roadway infrastructure as a priority with available funds
- Potential Roads Levy should be limited to 5-year terms with renewal options pending public acceptance
- Large capital roadway improvement should have a firm time frame, reasonable budget, clear plans, and community support
- Projects with a high percentage of federal/state funding should be prioritized
- When City Council builds trust with the community, the community will fund subsequent projects.
- Current business plan isn't working (i.e. development pays for initial road and then years later City has to pay to maintain them).
- Provide the community with a feasible alternative for an 'outer belt', which will save existing roads from trucks.

E.9.4

Implement the Recommendations of the Downtown Parking Plan. The City should work to implement the recommendations of the Downtown Parking Plan and regularly update it. One major item of the plan is to determine the viability of a Downtown parking garage. A parking garage Downtown could help alleviate parking demand during peak times and potentially support hotel and/or residential development such as more Downtown apartments. A study of the viability of this option should be conducted in order to inform decision making including identifying potential locations, costs and funding mechanisms.

E.9.5

Collaborate with adjacent jurisdictions regarding a potential Route 23 Bypass. Strategic planning has begun for the Route 23 Corridor from the southern Delaware County line to far north of the City. This work is focused on the alleviation of traffic congestion as well as development opportunity. The City should remain actively engaged in ongoing planning, including working closely with the County and surrounding townships as plans move forward. ODOT is in the initial stages of studying alternative routes for bypass travel along this Corridor and the City should be an active participant in this process.

E.9.6

Prepare for Intelligent Transportation Systems (ITS) integration. The City has begun to plan for the adoption and implementation of Intelligent Transportation Systems (ITS) including signal system operation, dynamic messaging signs, traffic cameras and detection, and the continued advancement of semi and fully autonomous vehicles. The City should also remain active in participation at the local and state level in the development of policies to address increasing concerns over driver distraction.



Intelligent Transportation Systems (ITS) integration ensure more efficient and safe transportation in the future.

OBJECTIVE E.10

Support multimodal transportation (bicycles, pedestrians and transit).

Many Delaware residents have shared through the planning process that they would like to see an enhancement of transportation alternatives via improvements to infrastructure and service. These improvements, coupled with an effort to prioritize infill and redevelopment and to focus new development in key Focus Areas, is part of a fiscally sustainable, more sustainable and quality-of-life-centered approach to planning.

Actions

E.10.1

Implement bicycle master plan recommendations. The City's Bicycle and Pedestrian Master Plan 2027 was adopted in 2017. This was the second such Citywide plan, updating previous efforts. It included an assessment of existing conditions, a public engagement and visioning process, and recommendations to implement the vision. The plan put forth a series of infrastructure projects, as well as program and policy recommendations that should be pursued in conjunction with this Comprehensive Plan.

E.10.2

Implement bicycle paths to link neighborhoods to destination points such as schools, business districts, the Delaware Community Center/YMCA and to community parks such as Mingo and Smith Park. Improved bicycle connections to these two community assets would assist residents in accessing them by means other than car. The active transportation route connections should consider more than recreation uses but also transportation corridors. The recommendations in the Bicycle and Pedestrian Master Plan, including where bicycle paths could be built, should be implemented.

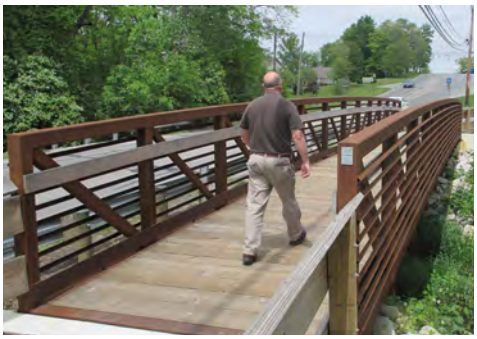
RECOMMENDATIONS FROM THE BICYCLE AND PEDESTRIAN MASTER PLAN 2027

Following is a summary of plan recommendations, which include over $14 million in projects to be implemented over the next 10 years as well as other programs and policies.

- Short and medium term safety and gap-closing projects;
- Miles of on-road facilities such as bike boulevards;
- Defining neighborhood streets as bikeways;
- Road diet projects where wide or under-utilized travel lanes may be repurposed as bike lanes, a center turn lane, and/or on-street parking;
- Projects that focus on better connections across the City and in the Olentangy River Corridor such as along Delaware Run, the Springfield Branch rail spur, and along US-23, to be implemented as grants and roadway improvements allow; and
- Program and policy changes to improve biking in the City of Delaware.

E.10.3

Implement a variety of pedestrian connections. Connections should serve both travel and recreation demand. Routes should include a variety of surfaces from paved ADA compliant routes to primitive recreation trails that make connections between higher level pedestrian ways and bikeways.



High quality pedestrian connections make travel by foot more convenient, safe and enjoyable.

E.10.4

Prepare and implement a plan focused on the pedestrian and roadway experience Downtown. Downtown Delaware is the urban core of the community. The streets, including US and State routes, carry a tremendous traffic volume for local and thru traffic. The area is home to residents, businesses, restaurants, civic anchors (such as City Hall) and several Delaware County facilities. With the growth of Downtown, there is a tremendous amount of pedestrian traffic. Downtown hosts sidewalk patios, festivals, farmers markets and many special events, which take place within the streets themselves.

The City should specifically study Downtown to account for this diverse array of needs and activities. This could be accomplished through a stand-alone Downtown transportation plan or in concert with a more general and encompassing Downtown strategic plan which is the preferred method to account and balance all interests, some of which could be competing for limited physical space. Elements to account for in such a study include 'road diets', extension of the sidewalk space, pedestrian friendly enhancements, access for multimodal opportunities such as bicycles and transit, as well as future opportunities with emerging vehicle technology related to autonomous vehicles parking and drop needs.

This effort must be co-sponsored by representatives of the downtown business associations as significant changes to parking, accessibility, vehicle travel etc. would be likely components of a plan. Through the COVID-19 pandemic, restaurants, for example, have found pick-up only street side spaces to be invaluable to maintain business and providing for customer needs.

E.10.5 **Implement "complete street" design for new and existing roads.** A complete streets policy was adopted by the City of Delaware in October 2020. The policy considers the public right-of-way, including sidewalks and streets, as infrastructure for pedestrians, cyclists, and smaller motorized vehicles in addition to cars. The policy should inform new street design in association with the implementation of this Comprehensive Plan and will be especially important for new streets that may be constructed in Focus Areas where significant new development is anticipated.



E.10.6

Consider a shift to maximum parking standards in certain locations. Conventionally, and in Delaware's current Code, zoning codes include parking minimum standards in order to ensure adequate supply of parking. However, in some locations, minimums can contribute to "over-parking," encouraging more vehicle trips that could otherwise be made by other modes of travel. It can also contribute to more hardscape surfaces, which results in more stormwater runoff. Maximums establish an upper limit on parking supply, either at the site level or across an area. Maximums may not be appropriate throughout the City. As zoning codes are revised the City should explore using maximums in locations where access by other modes is to be encouraged. Maximums could be implemented in association with transferable parking entitlements, so that the allowed number of parking spaces can be transferred or sold to another development if they are not needed. The City could also work with property owners to explore reductions in existing parking surface areas for the same reasons described above and to reduce maintenance costs to owners. (Examples might be Delaware Square, Delaware Community Plaza, Georgetown Center, Westfield and the Glenwood Commons shopping area.)



Over-parking can increase vehicle trips unnecessarily and should be avoided when possible.

E.10.7

Maintain bicycle and pedestrian connectivity requirements for new residential development. As part of a review of the City's Zoning Code, the City should continue to include requirements for sidewalks, bike paths and other accommodations for people traveling to, from and within these areas by modes other than car. Improvements should be in accordance with the most recent Bicycle and Pedestrian Plan. There may be very limited times when cash-in-lieu payments from development could be available to general citywide multimodal trail planning and construction.



E.10.8

Embrace and accommodate demand for new travel alternatives. Throughout the central Ohio region, alternative modes of transit are growing in popularity, including ridesharing and carsharing as well as shared bicycle and scooter services. Such services should continue to be taken into account as part of the City's transportation planning efforts, especially as new development increases demand.

E.10.9

Support Delaware County Transit Services. Delaware County Transit provides critical transportation throughout Delaware County, including fixed route, demand response and paratransit services. The City should continue to work with Delaware County Transit to sustain current routes to, from and within the City and to explore potential service enhancements to complement the Bicycle and Pedestrian Master Plan. This is also an important transportation alternative from an economic development perspective to connect workers and jobs as described in Goal B. Similar partnerships with the Central Ohio Transit Authority (COTA) should also be pursued.



OBJECTIVE E.11

Improve trash and recycling service.

While the City takes pride in providing a high level of service, residents have identified opportunities to enhance existing service, borrowing from examples in other communities in central Ohio and beyond. This includes both examining opportunities to enhance what already exist and supplementing it.

Actions

E.11.1 **Study composting service alternatives.** Composting has become popular nationally and within Delaware as a way of directing food waste to replenish and stabilize soil rather than adding it to landfills and incinerators. Other cities have set an example through partnering with private industry leaders in establishing a monthly composting service that could be instructive for Delaware. The City should undertake a study and cost benefit analysis to determine if a similar program could be initiated in Delaware.

E.11.2 **Study enhancements to recycling service.** In an effort to reduce the City's overall waste, the City should study potential enhancements to existing service. This may include a study and cost benefit analysis in exploring a program to provide recycling services to schools and restaurants. The City has recently moved to pilot providing single stream (co-mingled) residential curbside recycling collection in response to industry demand. The City will further be piloting the use of tip cart residential curbside recycling collection in 2021, an effort receiving large community support in advance of the first phase roll out. Together, these initiatives should enhance recycling services and improve participation rates.

E.11.3 **Make hazardous waste recycling more convenient.** More convenient and regular service to recycle hazardous waste (such as paint, batteries, etc.) has been identified as a community priority. Additional locations and-or pick-up days could be explored as well as volunteer-led efforts to supplement City services. The City has been working closely with both Delaware County and the Delaware, Knox, Marion, Morrow Waste District to establish such services within the Delaware Community, likely in association with the development of the new Waste Transfer Facility just north of the City. These additional services will need to be marketed to the community.

E.11.4 **Assess zero waste policies.** The United States Environmental Protection Agency defines zero waste as "The conservation of all resources by means of responsible production, consumption, reuse, and recovery of products, packaging, and materials without burning and with no discharges to land, water, or air that threaten the environment or human health." Cities throughout the U.S. have adopted zero waste standards to strive toward zero waste through a combination of policies and projects. The City should review the policies of other cities to determine if similar standards should be adopted in Delaware.

E.11.5

Explore a "Downtown collection district."
Waste management in urban cores present a host of difficulties in the provision of a uniform, dependable and cost-effective solution to refuse collection. The City should explore opportunities to develop a "Downtown collection district" whereby collection is managed by a single operator through city contract and with private access agreements with property owners. The City has been successful in piloting publicly accessible dumpster collection for several blocks downtown. Expanding this initiative would result in competitive pricing, reduced number of refuse vehicles in the core, and greater control over waste management aesthetics and illegal dumping.



OBJECTIVE E.12

Provide safe and sufficient water and sanitary sewer facilities.

Planning for water and sanitary sewer must be considered in parallel with land use planning in order to promote development that is fiscally prudent, environmentally sustainable and makes the best use of land resources. Utilities decisions should inform land use decisions and, conversely, land use decisions should take into account available utilities. The City can proactively coordinate these efforts.

Actions

E.12.1 **Implement water and sewer master plans.** The City must implement water and sewer master plans in order to assess the current service relative to demands placed by land uses and activities and to provide a framework for future actions. The plans provide an important roadmap to ensure a match between where, how much and what type of service is provided.

E.12.2 **Keep water and sewer plans updated.** Water and sewer plans should be regularly updated including in accordance with the adoption and implementation of this Comprehensive Plan.

E.12.3 **Assess policies requiring annexation.** Currently annexation is generally required when utilities are to be extended. In particular, as Focus Areas identified in this plan are developed, it will be important to be strategic about annexation relative to water and sanitary sewer provision. In addition, there may be other unique situations that may require an approach that differs from what is usually pursued.

WATER AND SEWER SERVICE IN DELAWARE

The City of Delaware's primary water source is the Olentangy River. The City has the capability to blend this river water with groundwater from wells drilled to more than 200 feet deep. Delaware's water plant treats and distributes an average of 3.3 million gallons per day to more than 12,000 customers through 190 miles of water lines and 2,000 fire hydrants. The sewer, or wastewater, division collects and treats domestic and industrial wastewater discharge and returns it to the Olentangy River in an environmentally safe and clean way. The system includes 175 miles of sewer line, 3,250 manholes and 12 pump stations. (Source: City of Delaware)

OBJECTIVE E.13

Enhance fire services and safety.

As the population of the City continues to grow, an emphasis on maintaining and expanding citywide fire services will be important for public safety.

Actions

E.13.1 **Incentivize sprinkler systems for historic buildings.** Although not a requirement for the State of Ohio, installing sprinkler systems in historic buildings, especially in the downtown core, could become an important fire safety standard for the City in the future. Grant funding could incentivize the installation of these sprinkler systems. One of the potential funding streams the City could consider is a portion of an income tax that is directed toward the fire department.

E.13.2 **Construct a new fire station in the Far East Side Focus Area.** As growth and development continues in the Far East Side Focus Area, there will be a need for another fire station. This new fire station will ensure the health and safety of residents as the area is populated.



Fire Station 304 was completed in 2019 at Cheshire Road and Glenn Parkway designed to increase public safety in the southeast corner of the City, where the population has grown to more than 5,000 residents.

GOAL F: ENSURE FISCAL SUSTAINABILITY

Promote development, land use, infrastructure and other policies that will support a healthy fiscal position.

OBJECTIVES

F.1 Continue practices that support sound fiscal planning.

F.2 Build upon existing fiscal policies with new tools and strategies.

F.3 Link land use planning to fiscal policy.

F.4 Improve data collection to support fiscal analysis and decision-making.

OBJECTIVE F.1

Continue practices that support sound fiscal planning.

Delaware is in a strong fiscal position, but long-term fiscal health will require ongoing attention. The City has a number of procedures and practices in place that should be maintained.

Actions

F.1.1 **Maintain the City's history of receiving clean audits and adhering to financial policies.** Delaware has an exemplary record of conducting appropriate auditing and following policies to ensure that the fiscal conditions are well understood and transparently communicated. Current policies and protocols should be continued.

F.1.2 **Continue management practices for distributing revenues toward costs.** The City should continue current practices for managing and reporting on revenue distribution through the General Fund, Special Revenue Funds, Capital Projects Funds; Debt Service Funds, and Enterprise Funds.

F.1.3 **Continue pay-as-you-go practices.** Funding for improvements includes pay-as-you go funding out of current revenues for lower cost improvements. This includes grants, bonds and impact fees. These practices should continue to be utilized in order to maintain levels of service as new development takes place and new demands arise.

OBJECTIVE F.2

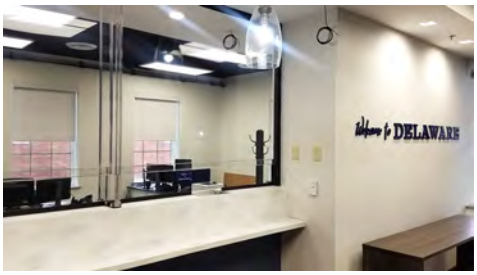
Build upon existing fiscal policies with new tools and strategies.

As Delaware continues to grow and evolve, it will be important to adapt and adopt new policies that will help to promote fiscal health.

Actions

F.2.1 **Obtain a credit rating enhancement from Moody's.** The City currently maintains a good credit rating of Aa2. However, the City should seek to obtain an Aa1 rating from Moody's on its general obligation department to reduce interest expense on outstanding and future long term debt. This will allow the City to sell its bonds to investors at lower interest rates, thereby reducing the cost of financing capital improvements over time.

F.2.2 **Develop a long term and sustainable funding source for the maintenance of the City's roadway infrastructure.** As presented in this Comprehensive Plan, the most recent effort to pursue a tax levy to support roadway infrastructure was not successful. With information gathered through Access Delaware, and in accordance with the recommendations in this plan, the City should pursue road impact fees and/or other mechanisms that may be used to support new roadway infrastructure that will be required to realize the new development anticipated in this plan.



The renovated south entranceway to City Hall welcomes community members to the new utility counter.

F.2.3 **Prepare estimate of fiscal impacts of development.** As follow-up to this Comprehensive Plan, the City should hire a consultant to prepare an analysis of the City's general fund account for the last ten or more years. This analysis will be used to conduct a Return on Investment analysis as described in Action A.3.1. The purpose is to have a more nuanced understanding about which development will and will not pay for itself. The findings can then be used and weighed alongside with other considerations, to make decisions about which development types should be pursued in which locations in accordance with this Comprehensive Plan.

OBJECTIVE F.3

Link land use planning to fiscal policy.

In making future land use decisions and implementing the recommendations in this plan, it will be essential to consider and take into account fiscal impacts. A series of recommendations are presented in Objective A.3, which are also summarized below.

F.3.1 **Conduct a "return on investment" analysis for major development proposals.** A fiscal return on investment (ROI) analysis would determine the net fiscal benefits to the City relative to costs for providing public improvements to support a development. In order to support this Action an estimate of the fiscal impact of different development types should be completed as described in Action F.2.3. See Action A.3.1 for more information.

F.3.2 **Allow TIF districts in selected locations.** The City currently has 10 TIF Districts in place. While state-wide legislation enacted since the last comprehensive plan has made some changes to how TIF districts work, reducing some of their benefits to municipalities, in certain cases TIFs may still be desirable in selected locations. They can be an important tool in helping municipalities to afford needed infrastructure related to every development type. See Action A.3.2 for more information.

F.3.3 **Study increase in fees for services.** The City collects engineering fees and building and zoning fees for development, among others. Increasing fees could help generate revenue to support new development as it takes place. See Action A.3.3 for more information.

F.3.4 **Consider increasing development impact fees.** In 2001, the City of Delaware began collecting impact fees. Increasing fees could help generate revenue to support new development as it takes place. Fees need to be carefully and specifically set to ensure their defensibility and their connection to the community's need for the capital items they relate to. In 2018, the City commissioned an update to prior fee study. The update is currently in draft form. The City should work to finalize the update and determine any subsequent implementation. See Action A.3.4 for more information.

OBJECTIVE F.4

Improve data collection to support fiscal analysis and decision-making.

The ability to make sound fiscal decisions depends on accurate and useful data. The City should strive to keep existing data current and, when possible, should implement new data collection strategies.

Actions

F.4.1 **Develop a strategy for income tax data collection.** Currently, the City does not have an accurate and reliable way of capturing income tax data. However, having solid income tax data could provide valuable information that could tie to land use types. The City should look to other communities and explore options for better income tax data collection.

Chapter 8
Implementation



8. IMPLEMENTATION

This Comprehensive Plan is intended to be used on a day-to-day basis to guide the work of the City of Delaware's Planning and Community Development Department, other City departments and a range of organizations with a stake and an interest in seeing the plan's recommendations come to fruition. Following is a summary of how decisions and processes should align with the Goals, Objectives and Actions of the plan.

CAPITAL IMPROVEMENTS

Capital Improvement Plans (CIPs) should be consistent with the Comprehensive Plan's Goals, Objectives and Actions.

ECONOMIC INCENTIVES

Economic incentives should be considered and prioritized relative to their consistency with the Comprehensive Plan's Goals, Objectives and Actions and especially the Focus Areas identified in the plan.

DEVELOPMENT APPROVALS

Administrative and legislative approvals for development proposals may be pursued as a means of implementing the plan. Decisions by planning entities should reference relevant Comprehensive Plan Goals, Objectives and Actions as well as the Character and Land Use recommendations.

PRIVATE DEVELOPMENT DECISIONS

Property owners and developers should consider the Goals, Objectives and Actions of the Comprehensive Plan in their land planning and investment decisions. Public decision makers can use the Comprehensive Plan as a guide to consider whether private development is meeting the needs and aspirations of the City.

ANNUAL WORK PROGRAMS

Individual departments, administrators, boards and commissions should be cognizant of the Goals, Objectives and Actions in the Comprehensive Plan when preparing annual work programs and budgets.

IMPLEMENTATION TOOLS

Revisions to existing tools for implementation should be made in accordance with the Comprehensive Plan. Consideration of any potential new regulatory or non-regulatory tools should also reflect the plan's recommendations.

MATRIX

The following table provides more information on each Action including timeframes and identification of a lead coordinating entity.

TIMEFRAME KEY

- O = Ongoing
- S = Short term (0-3 years)
- M = Med. term (3-6 years)
- L = Long term (6+ Years)

LEAD AND SECONDARY CPOORDINATOR KEY

- CMO = City Manager's Office
- DPHD = Delaware Public Health District
- ED = Economic Development
- FIN = Finance Department
- MSD = Main Street Delaware
- NNA = Northwest Neighborhood Association
- ODOT = Ohio Department of Transportation
- Partners = a range of public and private partners and agencies
- PCD = Planning & Community Development
- PNR = Parks & Natural resources
- PPDC = Preservation Parks of Delaware County
- PSG = Public Service Group – CMO, PCD, PW, PU, PNR, ED, FIN
- PU = Public Utilities
- PW = Public Works
- OWU – Oho Wesleyan University



Actions	Timeframe	Lead	Secondary
A.1.1 Adopt mixed-use zoning districts.	S	PCD	
A.1.2 Provide regulatory incentives.	M	PCD	ED
A.1.3 Allow mixed housing types within new neighborhoods.	S	PCD	
A.1.4 Work with experienced developers.	O	PCD	
A.10.1 Require coordinated development on larger parcels.	O	PSG	
A.10.2 Assess impact of post-COVID-19 upon commercial development.	S	ED	
A.11.1 Implement Action A.17.2, Target property tax incentives.	S	ED	FIN / PCD
A.11.2 Establish a City CIC and Partner with the County Land Bank.	S	ED	
A.11.3 Create a commercial vacancy inventory.	S	ED	
A.11.4 Assess incentive options for vacant storefront utilization.	S	ED	
A.11.5 Establish a pop-up retail program.	S	ED	
A.12.1 Maintain current required environmental analysis.	O	PCD	
A.12.2 Develop a program to promote energy efficient buildings.	S	PCD	FIN
A.12.3 Revise requirements for landscaping and species listings.	S	PNR	PCD
A.12.4 Develop new standards for roads in subdivisions.	M	PW	PSG
A.12.5 Require developers to show greenspace connectivity.	S	PCD	PNR
A.12.6 Audit Zoning Code to identify opportunities for Low Impact Development (LID).	S	PCD	
A.12.7 Pursue pilot LID projects.	M	PCD	
A.13.1 Conduct an inventory and audit of brownfield sites in the City.	L	ED	PCD
A.13.2 Prioritize vacant brownfield sites for redevelopment.	O	ED	
A.13.3 Establish a brownfield remediation program.	L	ED	
A.14.1 Implement the Bicycle and Pedestrian Master Plan 2027.	O	PNR	
A.14.2 Update the Bicycle and Pedestrian Master Plan as needed to address growth and development.	L	PNR	
A.14.3 Provide connections from newly developed areas to greenway corridors.	O	PNR	
A.14.4 Create Greenway Master Plan	S	PNR	PCD
A.15.1 Prepare Area Plans.	M	PCD	
A.15.2 Align zoning overlay district regulations to area plans.	M	PCD	
A.15.3 Consider incentives.	M	ED	
A.16.1 Prepare Area Plans.	M	PCD	
A.17.1 Focus beautification efforts.	O	PSG	
A.17.2 Target property tax incentives.	S	ED	
A.17.3 Create design guidelines.	M	PCD	
A.18.1 Continue to pursue sensitive infill and redevelopment.	O	PCD	ED
A.18.2 Follow best practice in historic preservation.	O	PCD	
A.18.3 Study the expansion of the downtown area's planning boundary.	S	PCD	ED
A.18.4 Identify potential sites appropriate for intensification.	S	PCD	ED
A.18.5 Support economic development efforts.	O	ED	
A.19.1 Coordinate with campus master planning.	O	PSG	OWU
A.19.2 Ensure campuses do not isolate, but rather foster social and physical connections with the built environment.	O	PSG	OWU
A.2.1. Identify appropriate locations for quality, higher-density development.	M	PCD	
A.2.2 Create design guidelines.	M	PCD	
A.2.3 Create policies regarding density bonuses for developers.	M	PCD	
A.20.1 Formulate a task force.	S	PCD	
A.20.2 Develop zoning strategy.	S	PCD	
A.20.3 Assess potential form-based approach.	S	PCD	
A.20.4 Assess potential of a Unified Development Ordinance.	S	PCD	
A.20.5 Implement preferred Zoning Code change.	M	PCD	
A.21.1 Review and revise CIP.	O	CMO	FIN
A.3.1 Conduct a "return on investment" analysis for major development proposals.	S	PCD	ED
A.3.2 Allow TIF districts in selected locations.	O	PSG	FIN
A.3.3 Study increase in fees for services.	S	CMO	PCD / PW
A.3.4 Consider increasing development impact fees.	S	CMO	
A.4.1 Create guidelines for supporting annexations.	S	CMO	PSG
A.4.2 Develop criteria to be used for development outside of Focus Areas.	M	PCD	
A.5.1. Pursue recommendations of the City's Thoroughfare and Transportation Improvement plans.	O	PW	
A.5.2 Assess potential for an Adequate Public Facilities Ordinance (APFO).	M	PSG	
A.5.3 Support recommendations in Goal E, Leverage resources, infrastructure and amenities.	O	CMO	PSG
A.6.1 Become Full Member of Delaware County Regional Planning Commission (DCRPC).	S	CMO	PCD
A.6.2 Coordinate with Route 23 Corridor Strategic Guide.	M	PCD	PSG
A.6.3 Prepare joint land use plans with DCRPC in priority locations.	O	PCD	
A.6.4 Continue to participate in the Mid-Ohio Regional Planning Commission (MORPC) as a member.	O	CMO	
A.6.5 Participate in key regional studies and plans.	O	CMO	PSG

Actions	Timeframe	Lead	Secondary
A.7.1 Update design guidelines for residential subdivisions.	M	PCD	
A.7.2 Review and assess conservation subdivision overlay district.	M	PCD	
A.7.3 Create an entranceway matching grant program.	M	PCD	ED
A.8.1 Update corridor design guidelines.	M	PCD	
A.9.1 Require transition areas at edges of development.	O	PCD	
B.1.1 Continue to conduct marketing and recruitment.	O	ED	
B.1.2 Create strong economic development brand.	S	ED	
B.1.3 Advance infrastructure into Focus Areas when possible.	O	PSG	OWU
B.2.1 Continue work of the Delaware Area Chamber of Commerce economic development advisory team.	O	ED	Partners
B.2.2 Continue participation in the Mid-Ohio Development Exchange (MODE).	O	ED	
B.2.3 Establish a Community Improvement Corporation (CIC).	S	ED	
B.2.4 Continue participation in One Columbus.	O	ED	
B.3.1 Develop a recruitment strategy for industries that benefit from airport proximity.	S	ED	PW
B.3.2 Support recommendations of the Airport Master Plan, Facility Plans, and the Strategic Business Plan	S	ED	PW
B.3.3 Establish a Delaware concierge airport hub.	L	ED	PW
B.4.1 Expand small business infrastructure and incentives.	O	ED	
B.4.2 Develop an entrepreneur mentorship/partnership program.	S	ED	
B.4.3 Broaden Planned Business Overlay Zoning District.	M	PCD	
B.4.4 Create a pop-up retail support program.	S	ED	PSG
B.4.5 Provide trainings on other non-traditional financing options.	O	ED	
B.4.6 Implement entrepreneurship recommendations as stated in the Economic Development Strategic Plan.	O	ED	
B.5.1 Create a tourism development plan.	M	ED	
B.5.2 Implement cultural arts strategies.	O	PSG	
B.5.3 Establish a welcome center.	S	MSD	CMO
B.6.1 Strengthen ready-for-work programs.	O	ED	
B.6.2 Expand workforce-oriented transit.	M	ED	
B.6.3 Increase the amount of workforce housing.	L	PSG	
B.6.4 Conduct and periodically review analysis pertaining to Workforce of the Future.	O	ED	
B.6.5 Expand mentorship programs.	S	ED	OWU
B.7.1 Implement Economic Development Incentive Policy (EDIP).	O	ED	
B.7.2 Link incentives to fiscal return requirement.	O	ED	
B.7.3 Continue to use CRA and tax abatements.	O	ED	
B.7.4 Continue to work with Delaware County and the State to structure incentives.	O	ED	
B.7.5 Support Joint Economic Development Districts (JEDDs) where appropriate.	O	CMO	ED
B.7.6 Pursue TIFs where appropriate.	O	CMO	
B.8.1 Implement strategies to diversify the economic base.	O	ED	
B.8.10 Integrate new uses at key locations.	O	PCD	ED
B.8.11 Convert office to maker/tech space.	M	ED	
B.8.2 Create a Southwest Area Plan.	M	PCD	PSG
B.8.3 Create an infrastructure plan.	S	PSG	
B.8.4 Create southwest business consortium.	S	ED	
B.8.5 Create strategy to attract resident employers.	O	ED	
B.8.6 Brand the area.	S	PCD	ED
B.8.7 Create sustainability targets.	M	PSG	
B.8.8 Create Activity Districts, gateways and physical improvements.	L	PNR	PCD / ED
B.8.9 Assemble sites.	M	ED	
C.1.1 Create and distribute welcome packets.	S	CMO	
C.2.1 Organize implicit bias trainings.	O	Community	
C.2.2 Conduct a research initiative focused on ways to acknowledge the history of underrepresented populations.	S	Partners	CMO
C.2.3 Hold heritage festivals.	S	Partners	CMO
C.2.4 Prepare a diversity, equity and inclusion plan.	S	CMO	
C.3.1 Continue City newsletter.	O	CMO	
C.3.2 Host annual civic leadership awards.	M	CMO	
C.3.3 Recognize homeowner and neighborhood improvements.	M	CMO	
C.3.4 Implement programs to make Downtown comfortable for all.	O	MSD	CMO
C.4.1 Create an age-friendly strategy.	M	PSG	Sourcepoint / DPHD
C.4.2 Support Countywide age-friendly initiatives.	O	PSG	Sourcepoint / DPHD
C.4.3 Research multigenerational housing models.	M	PCD	
C.5.1 Create a forum for continued engagement in long-term community planning.	M	PCD	
C.5.2 Prepare principles for equitable engagement.	M	PCD	
C.5.3 Create a council of neighborhoods.	L	PCD	CMO
C.5.4 Develop mentorship opportunities.	O	CMO	Partners

Actions	Timeframe	Lead	Secondary
C.6.1 Integrate data and recommendations from recent health assessments and related studies into planning and	M	CMO	DPHD
C.6.2 Identify pedestrian improvement projects.	O	PW	PNR
C.6.3 Develop marketing strategy for parks targeting disadvantaged and minority populations.	S	PNR	
C.6.4 Adopt policies to address obesity and help alleviate food deserts.	L	CMO	DPHD
C.6.5 Prepare public health emergency information sharing strategy that derives knowledge from the COVID-19 pandemic.	S	CMO	DPHD
D.1.1 Provide incentives for attainable housing.	M	PCD	ED
D.1.2 Integrate workforce housing into plans for the Southwest and Southeast Managed Focus Areas.	L	PCD	
D.1.3 Provide grants, incentives and other financial support to maintain existing attainable housing.	O	PCD	
D.1.4 Create a housing upkeep community education program.	M	PCD	
D.1.5 Review zoning requirements to identify changes that could support for "missing middle" housing.	S	PCD	
D.1.6 Provide incentives for missing middle housing development.	M	CMO	PCD
D.2.1 Continue to work with community organizations.	O	CMO	
D.2.2 Study homelessness.	M	Partners	PCD
D.2.3 Provide grants, incentives and other financial support to maintain existing affordable housing.	O	PCD	
D.3.1 Support senior and multigenerational housing.	O	CMO	PCD / Partners
D.3.10 Allow mixed housing types within new neighborhoods.	O	PCD	
D.3.11 Ensure quality rental apartments.	M	PCD	
D.3.12 Provide incentives for rehabilitation.	M	PCD	
D.3.13 Incorporate rental housing into area plans for Focus Areas.	M	PCD	
D.3.14 License rental properties.	S	PCD	
D.3.15 Conduct survey on first time home buyers' housing choice.	S	CMO	Partners
D.3.16 Implement relevant recommendations from the Mid-Ohio Regional Planning Commission's 2020 Housing Strategy.	O	PCD	
D.3.2 Support "empty-nester" housing.	O	CMO	PCD
D.3.3 Attract master planned developments with a mix of housing types.	L	PSG	
D.3.4 Support traditional neighborhood development (TND) in the Southeast.	L	PSG	
D.3.5 Allow for smaller units on smaller lots in proximity to Downtown and in other selected locations.	M	PCD	
D.3.6 Create toolkit for increasing executive / high-end housing.	M	PCD	FIN
D.3.7 Implement cost sharing on utility extensions.	M	PU	
D.3.8 Implement one-stop design development and approvals.	L	PCD	PSG
D.3.9 Define and permit a wide range of housing types in the Zoning Code.	S	PCD	
D.4.1 Continue code enforcement.	O	PCD	
D.4.2 Discourage unsympathetic changes to successful existing neighborhoods.	O	PCD	
D.5.1 Establish a city-builder work group.	S	PSG	
D.6.1 Incorporate Community-Scale Activity Centers into new residential neighborhoods when possible.	L	PCD	
D.6.2 Explore opportunities to enhance neighborhoods through well-connected street networks and walkable blocks.	M	PW	PCD
D.7.1 Facilitate land assembly.	O	ED	PSG
D.7.2 Integrate expanded areas into Downtown.	M	PCD	ED
D.7.3 Establish a tax increment financing (TIF) district for the Downtown and part of the Riverfront and South Sandusky Street areas.	S	CMO	ED
D.7.4 Market Downtown to investors.	O	ED	
E.1.1 Continue collaborations between City staff and local school districts.	O	CMO	Partners
E.10.1 Implement bicycle master plan recommendations.	O	PNR	
E.10.2 Implement bicycle paths to link neighborhoods to destination points such as schools, business districts, the Delaware Community Center/YMCA and to community parks such as Mingo and Smith Park.	O	PNR	
E.10.3 Implement a variety of pedestrian connections.	O	PNR	
E.10.4 Prepare and implement a plan focused on the pedestrian and roadway experience Downtown.	L	PW	MSD
E.10.5 Implement "complete street" design for new and existing roads.	O	PW	
E.10.6 Consider a shift to maximum parking standards in certain locations.	S	PCD	
E.10.7 Maintain bicycle and pedestrian connectivity requirements for new residential development.	O	PCD	PNR
E.10.8 Embrace and accommodate demand for new travel alternatives.	O	PW	PCD
E.10.9 Support Delaware County Transit Services.	O	CMO	
E.11.1 Study composting service alternatives.	S	PW	
E.11.2 Study enhancements to recycling service.	S	PW	
E.11.3 Make hazardous waste recycling more convenient.	O	PW	
E.11.4 Assess zero waste policies.	M	PW	
E.11.5 Explore a "Downtown collection district."	S	PW	
E.12.1 Implement water and sewer master plans.	L	PU	
E.12.2 Keep water and sewer plans updated.	O	PU	
E.12.3 Assess policies requiring annexation.	S	PSG	
E.13.1 Incentivize sprinkler systems for historic buildings.	M	ED	

Actions	Timeframe	Lead	Secondary
E.13.2 Construct a new fire station in the Far East Side Focus Area.	M	ED	
E.2.1 Develop and implement strategic master plan.	S	PNR	
E.2.10 Expand programming partnership with Preservation Parks of Delaware County.	O	PNR	PPDC
E.2.2 Identify new park opportunities for the Southeastern part of the City.	S	PNR	
E.2.3 Prepare a riverfront access strategy.	M	PNR	
E.2.4 Revise and improve open space/parkland dedication requirements for new development.	M	PCD	PNR
E.2.5 Use Level of Service standards to identify need for new recreation facilities.	M	PNR	
E.2.6 Partner with local public and private institutions with large land holdings to maintain and protect their open spaces.	O	PNR	
E.2.7 Collaborate with the schools to provide neighborhood-level recreation opportunities.	M	PNR	Partners
E.2.8 Ensure open space and active recreation provisions in development standards.	M	PCD	PNR
E.2.9 Identify new urban natural area opportunities.	M	PNR	
E.3.1 Continue river and stream protection measures.	O	PNR	PSG
E.3.2 Study the Delaware Run Urban Stream Corridor.	S	PU	PSG
E.3.3 Ensure species habitat protection measures.	S	PNR	PCD
E.3.4 Prepare a detailed inventory and analysis of natural resources.	M	PNR	
E.3.5 Consider a natural resources zoning overlay district.	M	PCD	PNR
E.3.6 Create standards for Downtown and Riverfront District development.	M	PNR	PCD
E.3.7 Support existing State and City requirements for identified critical wetlands for preservation or mitigation.	O	PW	PU
E.3.8 Conduct an anti-litter campaign.	S	PNR	Partners
E.4.1 Maintain and adjust policies and standards for the City's tree canopy.	S	PNR	PCD
E.4.2 Prepare an urban forest plan.	M	PNR	
E.5.1 Maintain forest buffers along identified streams and tributaries.	O	PW	PNR
E.5.2 Adopt stronger standards to minimize impervious surfaces.	M	PW	PU
E.5.3 Potentially integrate lower impact development into new development.	L	PCD	
E.6.1 Establish an Arts Council.	M	PCD	
E.6.2 Designate an Arts District.	M	PCD	ED
E.6.3 Amend City regulations to allow and provide guidance on public art.	M	PCD	PW
E.7.1 Expand the Downtown Facade Grant program.	M	PCD	FIN
E.7.2 Review and reassess East Side National Register Nomination or Local Historic District Overlay.	L	PCD	
E.7.3 Launch neighborhood preservation workshop program.	M	PCD	MSD / NNA
E.7.4 Align private projects with State Historic Tax Credit requests.	O	PCD	
E.8.1 Research incentives for energy aggregation.	S	CMO	
E.8.2 Develop a local incentive program for green energy.	M	CMO	
E.8.3 Conduct an education campaign for Home Owners Associations (HOAs).	M	PCD	CMO
E.8.4 Identify opportunities for a local Energy Special Improvement District (ESID).	M	ED	
E.9.1 Continue roadway and intersection improvements, including those recommended in the 2021 Thoroughfare Plan.	L	PW	
E.9.2 Implement recommendations of Access Delaware.	O	PW	
E.9.3 Consider adopting a Road Impact Fee.	M	CMO	
E.9.4 Implement the Recommendations of the Downtown Parking Plan.	O	PSG	
E.9.5 Collaborate with adjacent jurisdictions regarding a potential Route 23 Bypass.	L	ODOT	PW
E.9.6 Prepare for Intelligent Transportation Systems (ITS) integration.	M	PW	
F.1.1 Maintain the City's history of receiving clean audits and adhering to financial policies.	O	FIN	
F.1.2 Continue management practices for distributing revenues toward costs.	O	FIN	
F.1.3 Continue pay-as-you-go practices.	O	FIN	CMO
F.2.1 Obtain a credit rating enhancement from Moody's.	M	FIN	CMO
F.2.2 Develop a long term and sustainable funding source for the maintenance of the City's roadway infrastructure.	M	CMO	FIN / PW
F.2.3 Prepare estimate of fiscal impacts of development.	S	CMO	
F.3.1 Conduct a "return on investment" analysis for major development proposals.	S	PCD	ED
F.3.2 Allow TIF districts in selected locations.	O	CMO	PSG
F.3.3 Study increase in fees for services.	S	PSG	
F.3.4 Consider increasing development impact fees.	S	CMO	
F.4.1 Develop a strategy for income tax data collection.	S	FIN	



Appendix

APPENDIX

The following plans, studies and public engagement documentation have helped to inform the Comprehensive Plan.

KEY PLANS, STUDIES AND PUBLIC ENGAGEMENT DOCUMENTATION

1. Focus on the Future Public Engagement Summary (November 2018)
2. Economic Baseline Assessment, Delaware Together (March 2019)
3. Southwest Industrial Area Opportunities Assessment, Delaware Together (January 2020)
4. Residential Market Analysis, Delaware Together (January 2020)
5. Fiscal Efficiency Evaluation, Delaware Together (May 2020)
6. Real Estate Market Assessment, City of Delaware (January 2021)
7. Draft Thoroughfare Plan (March 2021)
8. Summaries of Other Selected Relevant Plans

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MEMO

To:	Dave Efland, Director of Planning & Community Development	November 7, 2018
From:	Sarah Kelly and Emily Long, planning NEXT	
Re:	Round 1 of Public Engagement, Delaware Together, Comprehensive Plan	
cc:	Delaware Together Steering Committee	

This memorandum summarizes the first round of public engagement for the City of Delaware including:

- a Citizen's Academy workshop (5/24)
- input gathered at a Delaware Together Steering Committee meeting (7/16)
- a staffed First Friday booth with an interactive activity (9/7)
- a staffed Delaware County Fair booth with an interactive activity (9/15)
- five Focus on the Future workshops held on four evenings (9/13, 9/25, 9/26, 9/27)
- online public input (9/13 – 10/21)
- a self-directed YMCA booth (approx. 10/12 – 10/23)
- a self-directed Mingo Park booth (approx. 10/12 – 10/23)

The memo includes the following:

1. Purpose
2. Approach
    a. Greatest Opportunities
    b. Mapping Exercise
3. Who participated

1. Purpose

The City of Delaware launched a comprehensive planning process in early 2018 called Delaware Together. One of the key inputs to the process is insight from the community. Through the first round of public engagement, multiple opportunities were designed to provide the platform for anyone who cares about the future of Delaware to help shape the plan's recommendations. The engagement lays the groundwork for development of the plan's goals, objectives and recommendations. While distinct comments are useful, seeing where comments share themes or are similar is where the community can come together around core ideas, ideals, and ultimately actionable results. The measure of input can be made in terms of shared comments and ideas together with unique thoughts and challenges.

> *"Loved hearing what others shared and having a dialogue about the possibilities/opportunities"*

2. Approach

Delaware Together's first round of public engagement included face-to-face opportunities to provide input through the City's Citizen's Academy, the Delaware Together Steering Committee and five public workshops held at multiple locations in the City. Opportunities for online engagement through a web-based survey and mapping tool were also designed and broadly promoted. Interactive displays were used to gather input at First Friday and the Delaware County Fair (staffed booths) as well as at the YMCA and Mingo Park (self-directed). Most of the engagement opportunities included two components: Greatest Opportunities input and a Mapping Exercise. In part 1, Greatest Opportunities, participants were asked to answer the question, ***"What are the greatest opportunities for the Delaware community?"*** Through part 2, the mapping activity, participants were asked to identify strong and weak places in the city associated with specific geographic locations, and to explain why they were strong or weak.

This section summarizes input collected. It draws from a database of every comment recorded (in participants' own words) and is organized around themes and sub-topics.

Greatest Opportunities

The following section includes the most prevalent themes and sub-topics shared in response to the question, "What are the greatest opportunities for the Delaware Community?" It includes overarching themes followed by prevalent sub-topics and specific objectives.

1. **Infrastructure, Walkability and Connectivity** *(145 comments)*
    a. Transportation
        i. Create better connection to surrounding cities
        ii. Expand public transportation
    b. Traffic/congestion
        i. Reroute large trucks to reduce congestion
    c. Parking
        i. Provide better opportunities for convenient parking, especially downtown
    d. Bike infrastructure/paths
        i. Connect and expand current paths
2. **Identity, Character and Community** *(98)*
    a. Art
        i. Improve art scene through public art, forming an arts council, calendar, district, etc.
    b. Historic Value
        i. Maintain and preserve historic buildings/districts
        ii. Promote Delaware's history

c. Aesthetics
    i. Improve landscaping, welcome signs, gateways to city
d. Sense of community
    i. Conduct outreach such as providing a welcome packet for new residents
    ii. Promote multiculturalism
    iii. Improve East-West and North-South Social Connections

3. **Growth, Revitalization and Targeted Areas** *(89)*
    a. River development
        i. Create a river walk
        ii. Improve access
        iii. Promote development
    b. Revitalization
        i. Improve the South Sandusky corridor (e.g. street redevelopment)
        ii. Improve The Point (e.g. alleviate traffic congestion)
        iii. Improve the East side area
4. **Economics, Employment and Tourism** *(89)*
    a. Economic development
        i. Develop the industrial and tech sectors
        ii. Expand technology to attract business (create corridors, consider fiber network)
    b. Expansion of businesses
        i. Support small and family-owned businesses and restaurants
5. **Sustainability, Environment and Parks and Recreation** *(74)*
    a. Parks and green spaces
        i. Expand current parks
        ii. Add and improve bike trails
        iii. Create greenways
    b. Environmental sustainability
        i. Plant more trees
        ii. Make recycling available monthly for paint, batteries, etc.
6. **Downtown** *(66)*
    a. Parking
        i. Address lack of parking
    b. Continuation of positive momentum
        i. Consider new grocery store and/or other places for residents to shop for necessities

7. **Housing** *(49)*
    a. Housing options
        i. Promote more housing options
        ii. Build more affordable housing
    b. Historic character
        i. Preserve historic homes
8. **University and Education** *(45)*
    a. Ohio Wesleyan
        i. Strengthen partnership to leverage workforce, community dialogue, and continuous education opportunities
    b. School system
        i. Maintain and improve Delaware and Olentangy school systems
9. **Health & Safety** *(26)*
    a. Wellness
        i. Enhance food access (especially, Second Ward)
    b. Safety
        i. Address concerns about crime and drugs (especially Second Ward)
10. **Accessibility and Proximity** *(19)*
    a. Connections
        i. Improve connection to Columbus and Central Ohio suburbs
11. **Social Services** *(18)*
    a. Enhance coordination and communication of services
    b. Support the homeless population and those with drug addiction
12. **Communication and Management** *(8)*
    a. Local news
        i. Increase opportunities for sharing local news and information
13. **Other** *(66)*
    a. "Smart" related topics *(8)*
        i. Be a smart and sustainable city (smart growth in fast growing region)
    b. Vacancy *(7)*
        i. Address vacant lots and buildings
    c. Diversification *(7)*
        i. Encourage socioeconomic diversity
    d. Workforce Development (7)
        i. Sustain and engage the workforce
    e. Wi-Fi *(4)*
        i. Enhance access to public and free Wi-Fi

Mapping Exercise

Below is the summary of the mapping exercise performed and its 471 comments at the Focus on the Future workshops and online survey. Identified and described are some of the top strong and weak places in Delaware, followed by some of the most prevalent comments made about each about why the place was identified. Additional places are identified in the attached map. (See Appendix A, strong/weak places summary map).

1. **Strong**
    a. Downtown *(46)*
        i. People want to visit this vibrant location for its restaurants, shops, walkability, art, culture, and history
        ii. Evokes a sense of community, identity, and belonging
        iii. Includes negative comments in relation to parking
    b. Ohio Wesleyan *(25)*
        i. Beauty and character of the university
        ii. Opportunities that the university brings such as culture, diversity, students, and continuous partnerships with an educational center
    c. Mingo Park *(23)*
        i. Green space, trails, activities, and access to Olentangy River amenities
    d. YMCA *(14)*
        i. Strong community spaces with great amenities such as a splash pad, bike trails
        ii. Facilitates health, community, and a family atmosphere.
    e. Stratford Ecological Center *(11)*
        i. Sustainable, unique location with great greenspace and many educational opportunities, especially for children

2. **Weak**
    a. Corridors *(82)*
        i. Lake Street *(21)*
            - Blight, poverty, vacant buildings, drug use, and visually unappealing
            - Opportunity for redevelopment
        ii. South Sandusky Street (*12*)
            - Run down
        iii. Central Avenue *(8)*
            - Traffic and congestion
    b. The Point *(37)*
        i. Traffic and congestion
        ii. Blight, lack of security, noise pollution, and the need for maintenance
    c. Delaware Square Shopping Center *(15)*
        i. Run down, an eyesore, and not well maintained
        ii. Vacancies
        iii. Inaccessibility to the shopping center without a car

d. East Side *(12)*
    i. Run down
    ii. Empty, vacant buildings and homes
    iii. Lack of connections to the rest of the City
e. Industrial *(9)*
    i. Liberty and London industrial area is rundown and in need of redevelopment

3. Who Participated

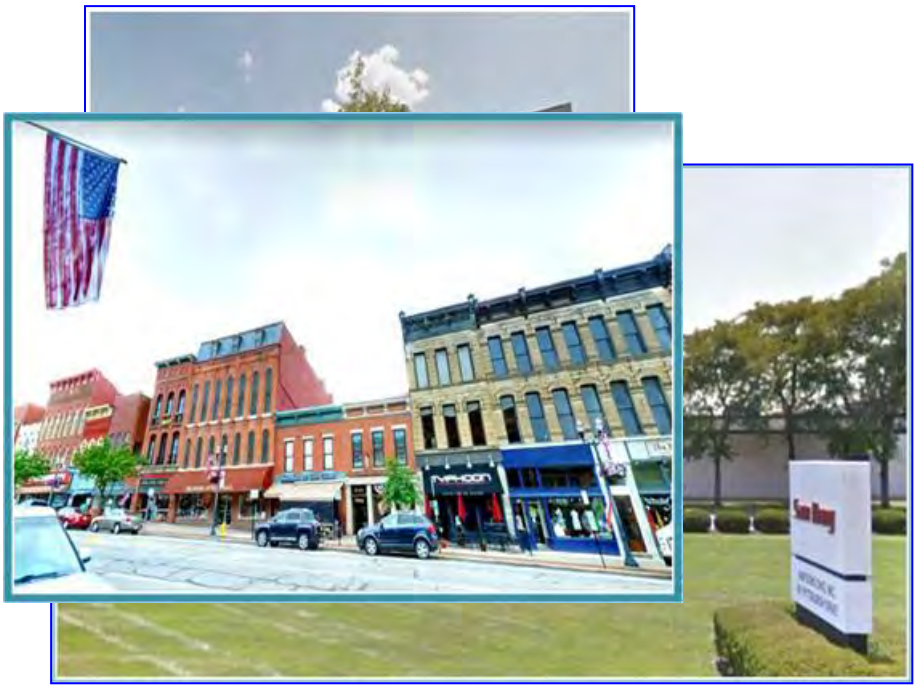
Participants who attended the public workshops filled out an exit questionnaire about their experience and themselves. Of those who participated, 67% completed the exit questionnaire. Additionally, those who engaged online answered a few key questions. (See Appendix B, Exit Questionnaire Results.) The following insight is based on responses:

Key Takeaways

- 1,312 unique comments were collected
- Email and word of mouth were the most popular ways people heard about the Focus on the Future Workshops.
- 100% of participants said they felt comfortable working within the small groups, and 100% felt that their input was heard.
- 99% of participants said they will stay involved with the planning process for Delaware Together.
- Participants closely matched the demographics represented in the City of Delaware with respect to race, gender, ethnicity, etc.
- All four wards were well-represented
- There was age diversity among participants, with over-representation within the age cohorts of 15-24 and over 55.
- Those with a higher education and higher annual household income were overrepresented relative to the City's population.
- Participants varied with respect to amount of time they have lived in the City and included long-time residents as well as those who have recently moved.

Delaware Together

Economic Baseline Assessment



March 2019
Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

This report presents findings on the city of Delaware's economic and demographic base as an input to broader economic development and city-wide planning, especially future land use planning. The Baseline Assessment provides regional context, along with an overview of local demographic and economic trends. The local economic base is examined, in terms of key assets, commutation patterns, employment trends, economic drivers, and industries. The Southwest Industrial Area is a particular focus of this assessment, with a review of existing conditions in the area and discussion of its competitive advantages as a location for economic activity. Finally, initial baseline analysis is also provided of the city's housing, in terms of existing housing conditions and market trends as a basis for further analysis of the city's housing demand and market potentials. Findings from the Housing Market Analysis will be presented at a later date in a separate report.

Section 1. DEMOGRAPHIC OVERVIEW

This section provides a review of Delaware's demographic trends within the regional context. Trends in population, households and income were examined along with other indicators, including education levels, that are particularly relevant to the city's economic growth and development. (Note: Where "Delaware" is referenced throughout this report, it refers to the city of Delaware; when referring to the county, "Delaware County" is used.)

Regional Context

Delaware is part of the Columbus, Ohio Metropolitan Statistical Area (MSA), a growing region with a diverse economic base. Delaware is the northern-most large node within the MSA and therefore dominates the labor market in a relatively broad area, fanning out to the north and west.



The seven-county Columbus MSA had an estimated population of 2,078,725 in 2017, based on Census estimates derived from the American Community Survey (ACS). A large share of the region's population is still concentrated in Columbus and Franklin County, although suburban counties are growing. The MSA population is up by 9.3% since the last Census in 2010 and is now ranked 32nd among all metro areas in the United States. Delaware is also part of the Columbus Combined Statistical Area (CSA), a larger trade area that includes nearby metro and "micropolitan" areas. The CSA had a 2017 estimated population of 2,481,585, according to ACS data, making it the 24th largest CSA in the U.S. It

should be noted that there are fewer Census-designated CSAs than there are MSAs.

Demographic Trends

The city of Delaware, the county, and the region have all grown fairly rapidly over the past 17 years. Between 2000 and 2010, Delaware city's population expanded by nearly 10,000 or nearly 38% (3.8% per year). While the city has continued to grow through 2017, the rate of growth has fallen to about 1.9% per year and is more aligned with regional trends. Delaware County saw 5.8% annual population growth between 2000 and 2010, among the fastest in the region. The County's population growth rate has fallen to 2.2% per year since 2010. Overall, the Columbus MSA has seen steady growth averaging 1.4% per year (2000 to 2010) and more recently, 1.2% per year. Population growth rates have fallen nationally since 2010, due in large measure to a decrease in the population among those of child-bearing age.

Households

Households have increased at a slower rate than population as a whole, suggesting that growth in household size contributed to the region's rapid growth. Household growth averaged 3.9% in Delaware between 2000 and 2010, but has fallen below 1.0% since then and is nearly aligned with the region's growth rate of 0.8%. Delaware County still sees a slightly higher household growth rate of 1.7% per year. In general, household formation has slowed in the region, again as an indicator of age demographics. Slowing household growth will gradually impact on demand for housing as well as on the market for retail goods and services within the region.

Household Income

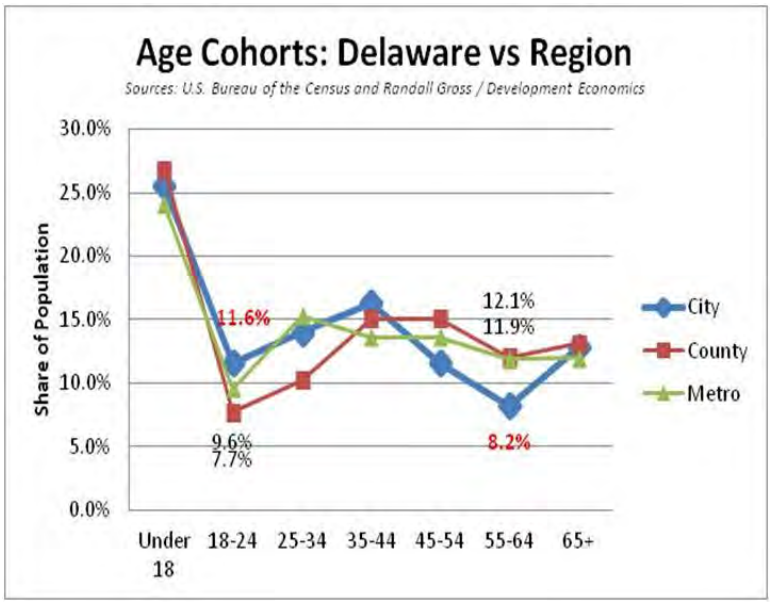
Income has surged in the city of Delaware since the most recent (2008-2009) recession, especially when compared to the region as a whole. Between 2000 and 2010, Household incomes in Delaware fell on average by 0.4% per year to just over $61,000 (in constant 2016 dollars, after adjusting for inflation). Delaware's incomes were therefore significantly lower than those in Delaware County but higher than those in the Columbus MSA as a whole. The global financial crisis and subsequent recession had a significant impact on Delaware's household incomes. By 2016, Delaware city's household incomes had rebounded to nearly $71,000, a very healthy increase of 2.2% per year in real (constant 2016) dollar terms. Incomes throughout the county have also increased since 2010, but not as fast as in the city of Delaware. Meanwhile, regional household income has stagnated and even fallen in real terms by 0.2% per year since 2010. Thus, households in Delaware city and county are seeing increasing incomes in comparison to the region as a whole.

Table 1.	KEY DEMOGRAPHIC TRENDS, DELAWARE, 2000-2015/16				
				Annual Change	
Factor	**2000**	**2010**	**2016/17**	**2000-10**	**2010-17**
Population	**25,243**	**34,753**	**39,363**	**3.8%**	**1.9%**
County	109,989	174,214	200,464	5.8%	2.2%
Metro	1,612,694	1,836,536	1,995,004	1.4%	1.2%
Households	**9,560**	**13,253**	**14,076**	**3.9%**	**0.9%**
County	39,674	62,760	70,224	5.8%	1.7%
Metro	610,757	723,572	764,973	1.8%	0.8%
HH Income	**$ 64,020**	**$ 61,238**	**$ 70,641**	**-0.4%**	**2.2%**
County	$ 93,544	$ 96,534	$ 106,933	0.3%	1.5%
Metro	N/A	$ 58,102	$ 57,440	N/A	-0.2%
Notes:	Census estimates 2016 for County/Metro, 2015 for City. Income is expressed in constant 2016 dollars.				
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Other Demographic & Social Characteristics

Delaware generally has a younger population than the region as a whole.

Chart 1



The city has younger wage earners and a smaller share of baby boomers, which helps explain why incomes are lower in the city of Delaware than in other parts of Delaware County. Younger workers have not reached their peak wage-earning years, so household incomes are lower than in older populations.

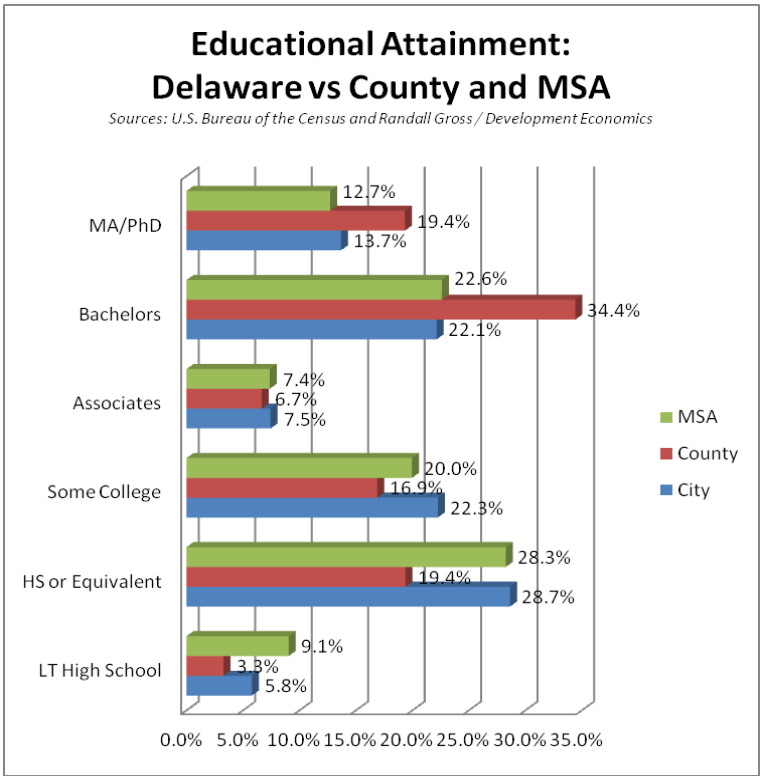
Ethnic & Language Diversity

The community's population base is less ethnically-diverse than the region's as a whole, with 91% of residents describing themselves as white compared with 77% region-wide. About 3.6% of Delaware's population is foreign-born, compared with 7.3% in the region as a whole. Spanish speakers represent a smaller share of Delaware's population than in other parts of the Columbus region.

Education Levels

About 43.3% of Delaware adults have achieved a college degree or higher. This number is slightly higher than that for the region as a whole (42.7%), but lags far behind Delaware County's average (60.5%). Meanwhile, more of the city's residents have less than a high school education than do Delaware County residents, but the metro area has an even higher share lacking a high school diploma. Educational attainment is an important factor in economic development.

Chart 2



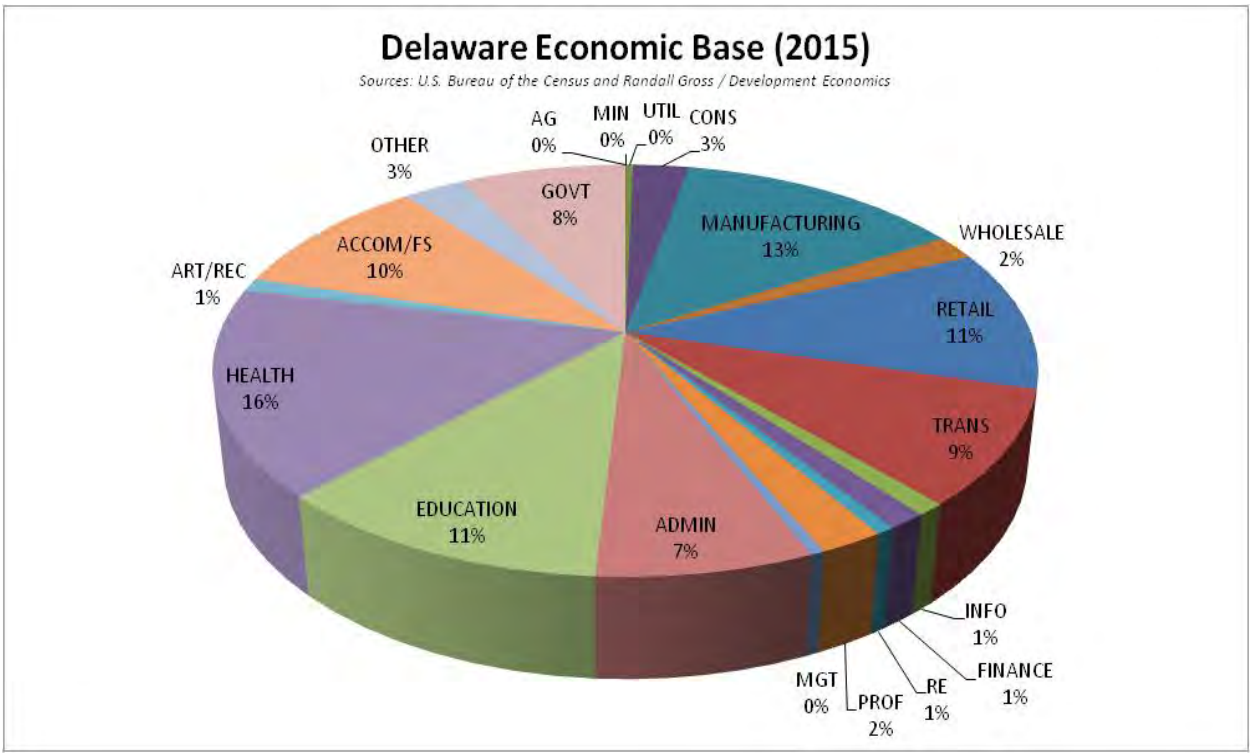
Section 2. ECONOMIC BASE & EMPLOYMENT TRENDS

The city's overall economic base was analyzed and key characteristics of the local economy are described herein. Major employers, trends in employment and other indicators are discussed. Delaware's relative positioning within the regional economy is described, focusing on key sectors within the economy. This information lays the groundwork for further analysis of Delaware's competitive advantage and key strengths for attracting and retaining industry.

Industry Sectors & Large Employers

Delaware benefits from a relatively diverse economic base. As illustrated below, no one sector dominates the local economy.

Chart 2



Key Industries include manufacturing, health care, education, retail trade, tourism (accommodation & foodservice), transportation, and administrative services Some industry sectors are less-represented, such as professional and technical services (2%), finance (3%), arts & recreation (3%), information services (1%), real estate (1%), and management services (<1%).

The city's largest private employers also illustrate the diversity of economic activity present in Delaware. The city's largest private employer is Ohio Health,

with about 1,500 employed in hospital and ancillary functions. The Kroger Distribution Center employs 1,100 while Ohio Wesleyan University has a total faculty and staff complement of about 600. Other large employers include such manufacturing concerns as PPG Industries, Sam Dong, and Vertiv (which conducts research & development activity in Delaware). Jegs Automotive has about 250 employees at its headquarters and administrative offices in the city.

• Ohio Health	1,500	Health Care
• Kroger Dist Center	1,100	Logistics
• Ohio Wesleyan	600	Education
• Advance Auto Distribution	400	Logistics
• Vertiv	350	R&D
• PPG Industries	330	Paint Mfg
• Domtar/AHP	300	Mfg: Hygienic Prods
• Jegs Automotive	250	HQ/Admin
• Liberty Castings	230	Foundry
• International Paper	175	Mfg: Cardboard Prods
• MW Acoust-a-Fiber	150	Mfg: Acoustic Prods
• Sam Dong	100	Mfg: Copper Prods

Employment Trends

Delaware had a total of about 14,900 jobs, based on Economic Census surveys completed in 2015. This number represents an increase of 3,200 (22.6%) since 2002 and 1,400 (10.4%) since the end of the recession in 2010. Despite the impact of the national recession, Delaware still gained 2,000 net jobs between 2002 and 2010. Growth sectors include health care, administrative services, transportation, accommodation & foodservice, retail trade, education, and others. There has been consistent growth throughout the 2002-2015 period in just three sectors: Administrative services (+660), accommodation (+590) and retail trade (+350). There were also three sectors that experienced a consistent (albeit small) decrease in employment: Finance & insurance (-60), professional & technical services (-50), and real estate (-25).

Several sectors impacted by the recession have rebounded since 2010. Among the most interesting of these is manufacturing, which had dominated Delaware's economy in decades past. Surprisingly, Delaware's manufacturing sector lost only a handful of jobs during the 2002-2010 period, counter to national trends indicting a major shift away from manufacturing that accelerated during the last recession. Despite a major gain in transportation jobs leading up to 2010, the sector lost a significant number of those jobs since that year. The gain in transportation and warehousing services prior to 2010 may relate to the opening of the Kroger Distribution Center during that period. It is not clear why some of those jobs have been lost in more recent years. Employment trends by specific industry sector are summarized in the table on the following page.

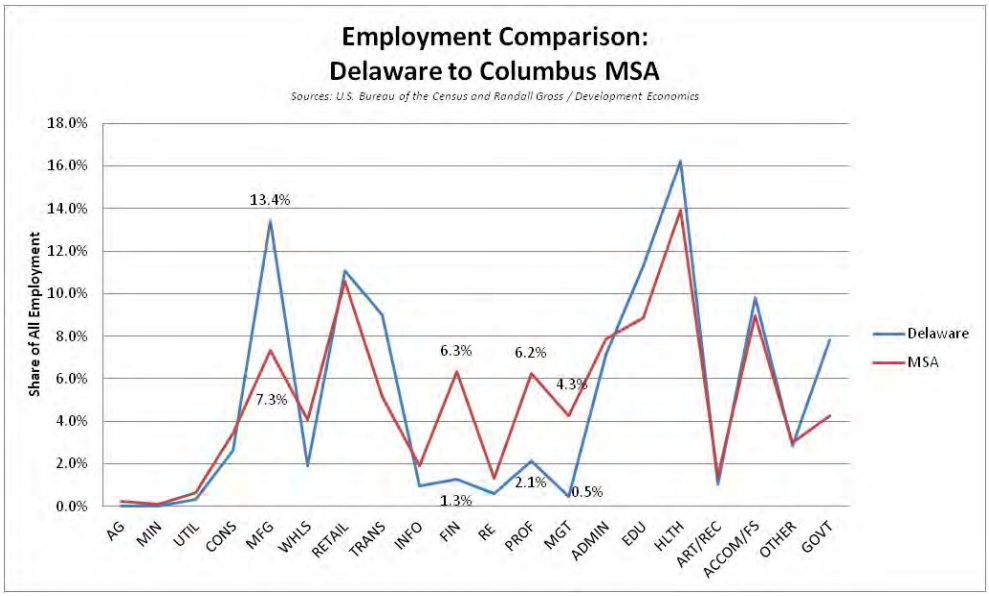
Table 2. AT-PLACE EMPLOYMENT TRENDS, DELAWARE, 2002-2015					
				2002-2015 Change	
Industry	2002	2010	2015	Number	Percent
Ag/Forestry	4	3	-	(4)	-100.0%
Mining	1	-	3	2	200.0%
Utilities	48	39	50	2	4.2%
Construction	397	212	390	(7)	-1.8%
Manufacturing	1,963	1,923	2,000	37	1.9%
Wholesale	267	308	287	20	7.5%
Retail	1,301	1,546	1,647	346	26.6%
Transportation	732	1,731	1,337	605	82.7%
Information	105	69	142	37	35.2%
Finance	248	209	192	(56)	-22.6%
Real Estate	116	113	91	(25)	-21.6%
Prof/Tech Services	361	423	316	(45)	-12.5%
Management	61	70	70	9	14.8%
Admin	410	804	1,065	655	159.8%
Education	1,494	744	1,681	187	12.5%
Health	1,714	2,506	2,419	705	41.1%
Arts/Ent/Recreation	152	140	153	1	0.7%
Accom/Foodservice	875	1,108	1,462	587	67.1%
Other	247	286	426	179	72.5%
Government	1,032	1,250	1,162	130	12.6%
TOTAL	**11,528**	**13,484**	**14,893**	**3,365**	**22.6%**
2010-2015				*1,409*	*10.4%*
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Delaware's Position in the Region

As shown on the following chart, Delaware remains relatively "heavy" on manufacturing employment as compared with the Columbus MSA as a whole. Nearly 14% of the city's employment base is in manufacturing, compared with just about one-half of that share at the regional level. At the same time, Delaware is relatively "light" on FIRE (finance, insurance and real estate), professional & technical, and management service (corporate office & related service) jobs as compared with the region. Only about 1.3% of Delaware's employment base is in finance, while that sector represents six times as much of the regional economic base. Similarly, only 2.1% of Delaware's jobs are in professional & technical services, versus more than 6% regionally. Finally, only 0.5% of Delaware employment is in management services, versus more than 4% at the regional level. The jobs for which Delaware has a smaller share (finance, professional &

technical, management) tend to be "brain-intensive" ones that require higher levels of education

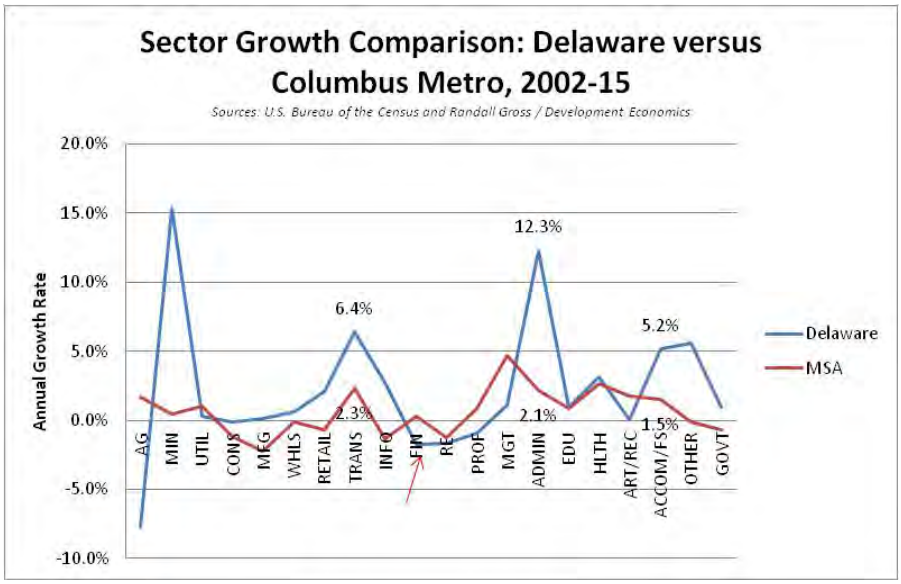
Chart 3



Growth Comparison

Delaware's industrial sectors were also compared against the region overall with respect to the rate of employment growth between 2002 and 2015.

Chart 4



This analysis suggests that Delaware's growth has exceeded the region's in several sectors including administrative services (e.g., "back office"), accommodation & foodservice (tourism-related), transportation, and (to a lesser

extent) several others including retail and wholesale trade, information services, manufacturing and construction. Delaware's mining (which includes quarries and other extraction services) employment growth far exceeded regional averages, but the numbers are so small that even a marginal increase seems large by comparison.

Where Delaware lagged regional trends in employment was again in FIRE, real estate, professional & technical, and management services; as well as in arts & recreation services. Slow growth in these sectors, particularly in professional and technical services, reinforces the city's limited positioning vis-à-vis these sectors.

Economic Drivers and Assets

The city of Delaware benefits from several key economic drivers as well as from its many assets and characteristics that help to anchor the community. Several of these assets and drivers are summarized below.

Location & Proximity

Delaware is located within the Columbus Metro Area, which is a large and growing MSA in a region that has otherwise seen stagnant or declining economic trends. Columbus's mix of state government, university research, and Fortune 500 companies along with its central location has helped stabilize and boost the Columbus economy in comparison to most of its Midwestern counterparts.

Delaware also has access to Polaris, Dublin and the Columbus central business district, all of which are major corporate hubs. Honda's assembly plant in Marysville is also proximate to Delaware, helping to provide diverse job opportunities for the city's residents. Assets like Delaware's Municipal Airport also serve to enhance Delaware's private transportation access.

Institutions

In addition to being part of the region that is home to the 3rd largest undergraduate university enrollment in the nation, Delaware itself has several institutions of higher education that serve to benefit the local economy. Ohio Wesleyan University, with enrollment of 1,600 students, is an important institution in the city and adds significantly to Delaware's cultural and academic life. Also located in Delaware is the Methodist Theological School in Ohio.

Heritage

Downtown Delaware offers a traditional Victorian-era downtown with a walk-able shopping experience and unique, independent shops. This heritage is an important part of Delaware's identity and serves as the core for residents' sense of place. Downtown Delaware has an active Main Street organization focused both on historic preservation and small business support, and has a locally-designated Historic Overlay, as well as aNational Register District downtown (Sandusky Street Historic District), all of which guide enhancing the existing physical appearance and appropriate new construction. In addition to the historic architecture, the city also offers historic venues such as the Strand Theatre and has served the nation as home to a U.S. President (Rutherford B Hayes) and one of America's most-beloved directors (Vincente Minnelli). Vintage businesses like The Hamburger Inn Diner add a local flavor to the city's offerings. Recent branding efforts undertaken by the City have also helped to build on the city's heritage as a foundation for growth.

Strong Business Base & Entrepreneurial Sector

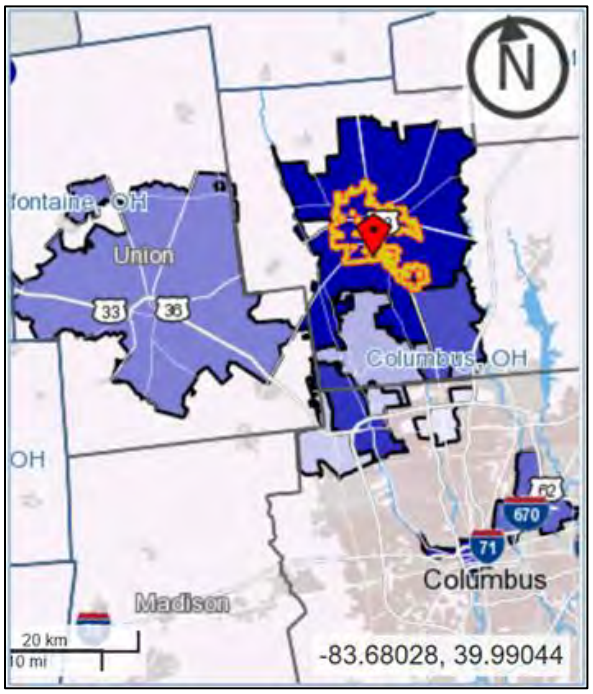
Delaware's economy is anchored by regional and global brands including Ohio Health, Kroger, Advance Auto, Jegs, International Paper, PPG, Vertiv and others. But in addition to these brands, the city has a healthy collection of local and unique specialty businesses along with an entrepreneurial sector that helps strengthen the city's overall economic base.

Section 3. DELAWARE LABOR MARKET & COMMUTATION PATTERNS

Given Delaware's location within the Columbus MSA, it is important to understand the labor market and commutation patterns, particularly the correlation between resident and at-place employment. Resident employment represents the jobs held by residents, regardless of the location of those jobs. At-place employment refers to the jobs located within the city of Delaware, regardless of where those workers live. Ideally, as many Delaware residents as possible who wish to work in Delaware would be able to do so. Not only would such balance contribute to residents' quality of life (through reduced time spent in traffic) but would also enhance local fiscal health, with the City retaining more of the income tax generated within Delaware.

Delaware Resident Commutation

Based on Census employment and commutation data, approximately 80% of working Delaware residents commute out of the city for their employment. Meanwhile nearly 80% of Delaware's at-place workers commute in to the city from other places. Only about 20% of the jobs in Delaware are held by Delaware residents. The top zip codes attracting Delaware residents for work include 43015 (22%), 43215 (5%), 43017 (4%), 43035 (3%), 43219 (3%), and 43040 (3%). The top ten zip codes for Delaware residents' jobs are illustrated below.



Map showing the ten zip codes capturing the highest number of Delaware residents for jobs in the region. These zip codes include several in Columbus, northern Franklin County, and Marysville; in addition to those in Delaware and southern Delaware County. (Darker shades indicate higher numbers of jobs)

Aside from Delaware, many of the city's residents are generally working in the city of Columbus (30%) and southern Delaware County, as well as in auto-related jobs in Marysville. The top zip codes for Delaware workers are the following:

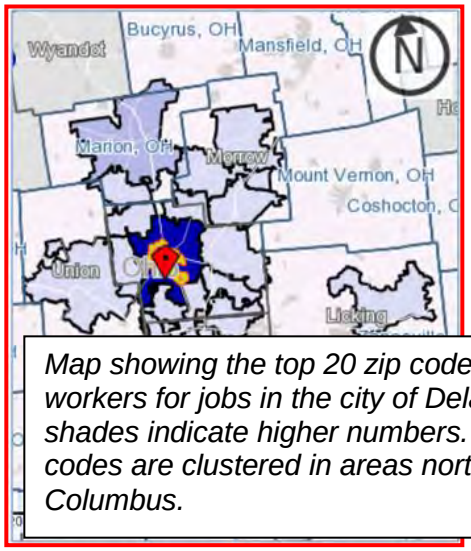
1. 43015: 22% (Delaware)
2. 43215: 5% (Columbus)
3. 43017 4% (Dublin)
4. 43035 3% (Polaris)
5. 43219 3% (Columbus)
6. 43040 3% (Marysville)
7. 43240 3% (Sunbury)

Remaining jobs for Delaware residents are distributed throughout the Columbus metropolitan area and beyond.

Delaware Labor Market Commuter-Shed

Workers holding jobs in Delaware originate throughout the region as well. In general, about one-third commute ten miles or less to work in Delaware. Another third commutes ten to 25 miles and the final third commutes more than 25 miles to work in Delaware. Workers originate primarily from these zip codes:

1. 43015: 27% (Delaware)
2. 43302: 6% (Marion)
3. 43065: 3% (Powell)
4. 43040: 2% (Marysville)
5. 43035: 2% (Lewis Center)
6. 43003: 2% (Ashley)
7. 43074: 2% (Sunbury)



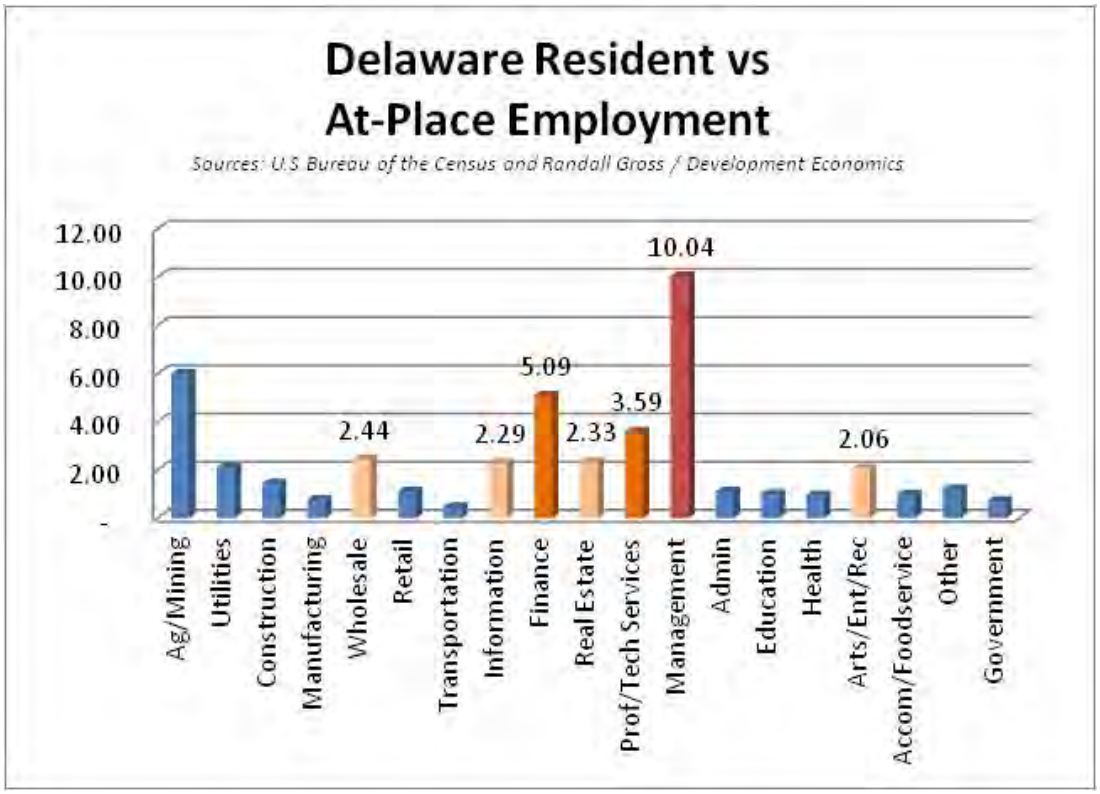
Map showing the top 20 zip code sources of workers for jobs in the city of Delaware. Darker shades indicate higher numbers. The top zip codes are clustered in areas north of the city of Columbus.

As indicated on this list and as illustrated on the map at left, Delaware's employers draw from a labor market area that includes Delaware and Franklin counties but also extends to the north and west to capture areas outside of the Columbus MSA. This labor market contrasts with the commuter-shed for Delaware residents, which extends primarily to the south and east.

The Labor Market Imbalance

As noted above, the commutation data suggest that 80% of Delaware residents are commuting out to jobs in Columbus and Delaware County while 80% of Delaware's workers are commuting in northern suburban but also from rural communities to the north-west. This imbalance is even more apparent when examining the ratio of residents to jobs in specific industry sectors, as illustrated below.

Chart 5



The chart shows that there are more than *ten times* as many management service professional workers residing in Delaware than there are management service jobs in the city. While less pronounced, the imbalance is also apparent within the FIRE (5x), professional & technical service (4x), and other sectors including wholesale trade, information service, real estate, and arts & recreation. The sectors closest to having an equal number of resident workers and jobs include manufacturing, transportation, government, accommodation & foodservice, health care, education, and administration services. Ultimately, if the city were to reduce the imbalance in resident versus at-place jobs, there would be a focus on attracting or growing more local jobs in management, professional & technical services, finance, arts & recreation, and a handful of other sectors.

Labor Market Growth Trends

Delaware's labor market is growing, which helps to provide a ready supply of workers to support local business growth. Within the existing commuter-shed from which a majority of Delaware workers are drawn, there is a population base of about 518,100. The base has increased by 35,300 or 7.3% since 2010, signaling positive growth in the labor market.

Table 3. POPULATION TRENDS, DELAWARE COMMUTERSHED, 2010-2016

Zip Code	2010	2016	Change 2010-2016 Number	Change 2010-2016 Percent
43015	2,788	2,875	87	3.1%
43302	47,907	52,834	4,927	10.3%
43065	36,621	40,449	3,828	10.5%
43040	55,874	60,290	4,416	7.9%
43035	23,746	26,421	2,675	11.3%
43003	31,484	33,103	1,619	5.1%
43074	3,734	4,265	531	14.2%
43061	38,148	40,957	2,809	7.4%
43082	12,106	12,386	280	2.3%
43081	55,447	58,780	3,333	6.0%
43315	29,361	31,821	2,460	8.4%
43235	44,477	50,964	6,487	14.6%
43229	38,667	42,314	3,647	9.4%
43017	54,950	53,632	(1,318)	-2.4%
43026	7,521	6,999	(522)	-6.9%
Sub-Total	**482,831**	**518,090**	**35,259**	**7.3%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

There has been relatively consistent growth in this market, with the exception of two zip codes that lost population since 2010: 43017 (Dublin) and 43026 (Hilliard). Growth was fastest in 43235 (north Franklin County), 43074 (eastern Delaware County), 43035 (south Delaware County), 43065 (Powell), and 43302 (Marion). The largest population base is in 43040, and the largest number added to the population base was in 43235 (north Franklin).

Section 3. EXISTING REAL ESTATE CONDITIONS

This section provides an overview of existing real estate conditions in Delaware, placed within the regional market context. An assessment of industrial, office, retail, and residential markets was conducted to describe inventory, occupancy, construction, rents and sale prices, construction and absorption, among other indicators. Perspective on Delaware's role in the regional market is provided where relevant.

Industrial

Existing market conditions in industrial real estate were examined for Delaware and the broader regional market and sub-market of which it is a part. Key findings are summarized below.

Columbus Area Market

Columbus is a large and growing distribution hub for the Midwest and beyond. Because of its central location, multiple branches of the interstate highway system, and marketing of Rickenbacker Inland Port. Based on data collected through Colliers, the Columbus market has a total of 236.4 million square feet of leasable space in larger buildings. About 3.9% (9.2 million square feet) is vacant. While about 4.2 million square feet of industrial space is under construction, area brokers and developers indicate that investment is suppressed due to the inability to capitalize assets that have benefited from successive tax abatements. Average industrial rents range from $2.56 to $6.34 per square foot.

The **North Delaware (County) Sub-Market** contains about 9.05 million square feet of industrial space, comprising less than 1.0% of the regional industrial market. The area has a 3.45% vacancy rate (312,200 square feet). There is very little speculative industrial space under construction. Rents range from $3.45 to $6.60 on average, slightly higher than the regional averages.

Local Delaware Market

As noted earlier, Delaware has a significant industrial and R&D presence, including major facilities for EMS, PPG, Liberty Castings, Midwest AF, and others. Such single-owner-occupied and purpose-built facilities are generally not included in the inventory data generated by brokers. Much of this space is geared for manufacturing, warehousing, and, to a lesser extent, research & development and laboratory use.

Within Delaware, it is estimated that there are about 1.8 million square feet of industrial space, based on available inventory data coupled with employment

factors. There is limited vacancy, estimated at 3.3% (mainly in Symmetry Industrial Park), which is consistent with sub-market and market-wide data. Rents are averaging $2.00 to $3.50 Net for larger spaces and $5.00 to $6.60 Net for smaller spaces (of 10,000 square feet or less).

Delaware's strengths for industrial real estate include the proximity of a local airport to industrial areas and of Marysville (as an automotive production hub); and to Columbus (as a market and distribution hub). The geographically large labor market area, which extends north and west of Delaware, provides a growing labor supply for manufacturing and distribution. Finally, there is available, serviced industrial land to accommodate industrial development in the area.

Among the local market's challenges is the city's lack of direct access to the interstate highway system, which impedes distribution market development. There is currently a lack of available building space to accommodate growing or relocating businesses. Finally, Delaware is not located directly proximate to major research drivers, like OSU, conducting basic research, although they are located within the same region.

Office

Again, Delaware's office market was examined within the context of the regional market. That market is much more concentrated within specific corporate nodes, although "consumer-oriented" office use such as real estate, insurance, and banking offices are located throughout the region to serve the local markets.

Columbus Area Market

The Columbus market is driven by corporate and administrative services. Downtown has headquarters for major multi-national businesses like Nationwide and others that occupy their own single-tenant buildings. But there is also 65.5 million square feet of leasable office space (in inventoried buildings over 5,000 square feet) throughout the region. Vacancy is about 9.26% (6.06 million square feet) which, although trending lower is still fairly high compared with several comparable markets. The Columbus area also has about 1.3 million square feet of leasable office space under construction. Rents are averaging $18.76 per square foot, market-wide.

The Polaris Sub-Market, which is the only designated office market within Delaware County, contains a total of about 4.6 million square feet. As such, Polaris constitutes about 7.0% of the region's office market. At 5.37% (246,000 square feet), vacancy is much lower in Polaris (which includes more new space) than in the market as a whole. There is very little under construction, which is surprising given that Polaris rents are 112% of the regional average, at $20.97 per square foot (according to Colliers data).

Local Delaware Market

Delaware does not have any large office nodes, per se, although there is office space in the downtown area and within the city's commercial corridors. Downtown Delaware has an estimated 106,000 square feet of office space (based on inventory data supplied by the City), of which 60% is in ground floor spaces. The concentration of office in ground-floor commercial spaces is higher than would normally be recommended in a downtown area, where an objective is to activate the streets through more consumer-oriented uses like retail, restaurants and audience support venues.

Downtown Delaware vacancy is estimated at 12%, although that number includes some upper-floor spaces that have not yet been updated to current standards). There is a very limited inventory of large floor-plate and mixed-use buildings offering office space. Rents in Delaware are averaging $14 per square foot for 1st-floor spaces and $10 to $12 per foot (modified gross) for upper-floor spaces. Areas south towards Polaris can yield rents in the $15 to $18 per-foot range.

Based on discussions with brokers and others, it is estimated that about 60% to 70% of Delaware's office tenants originate from within Delaware County. Key drivers include Ohio Health (and other health care providers); professional services (law firms (Delaware is the County Seat) and accounting firms); security, information and other technology firms; home-based businesses; and Ohio Wesleyan (Delaware Entrepreneurial Center).

The city's strengths for office uses include its affordability as well as its proximity to a large metropolitan area. Delaware offers a small town, friendly atmosphere without the stress of being Downtown or stuck in Polaris traffic. Drawbacks include the lack of purpose-built office space to accommodate users along with the lack of large, non-health care drivers.

Retail

Existing retail conditions were assessed primarily within Delaware County and the city of Delaware specifically. Polaris represents the major retail and mixed-use node in the county and therefore draws consumers and competes with retail within the city of Delaware. At the same time, as a mixed-use hub, Polaris also draws consumers into the county that may not have otherwise come to Delaware.

Polaris

The Centers of Commerce concept for Polaris constitutes 1,200 acres of mixed-use development. Out of that original concept, there are still about 200 acres remaining for development. Polaris Fashion Place is the primary retail node within the area, an enclosed mall with 1.6 million square feet of retail space and 200 stores. The mall is anchored by major department store tenants including H&M, J C Penney, Macy's, Saks, and Sears; as well as Dick's Sporting Goods, Van Mauer and others. Meanwhile the larger Polaris node also includes "big box" stores and venues with destination draw, including Ikea, TopGolf, Cabela's and others. Overall, Polaris is one of the largest retail and mixed-use nodes in Ohio.

Downtown Delaware

Downtown Delaware has a total of about 190,000 square feet of retail/commercial use, based on the inventory provided by the City and on field reconnaissance. Retail, restaurant and entertainment uses constitute about 60% of the 310,000 total square footage of ground-floor commercial space in Downtown Delaware. As noted earlier, the percentage of retail uses in ground floor space should be maximized where possible.

Chart 6



Downtown retail use is heavily oriented to eating & drinking establishments, which constitute roughly 45% of the total inventory of retail use. Restaurants, bars, and entertainment venues are often part of the first wave of businesses that help to re-establish downtowns as destinations, particularly in the absence of the large department stores that once dominated downtown retail business. Delaware has succeeded in building its downtown restaurant scene but the remaining retail categories have not yet caught up. Shopper's goods stores, businesses offering

product for which consumers comparison shop, constitute just 27% of the retail mix. Ideally, shopper's goods should be closer to 45% while eating & drinking establishments at 25-30%.

Personal service establishments (e.g., hair salons, tailors, etc) comprise 11% of Downtown retail space. There is more space devoted to personal services than to convenience stores like groceries, florists, specialty food stores (e.g., bakeries) and other convenience businesses. Again, it would be ideal to have more convenience businesses downtown that can address the needs of households within the immediate area as well as workers and others who come downtown on a regular basis. About 6% of Downtown retail space is currently vacant, which is one sign of success in a downtown that once had much higher vacancy rates in the range of 40 to 50%. Even shopper center and mall operators hope to maintain 95% occupancy, which allows for some movement and changeover of tenants in the market. So, 94% occupancy is a healthy number for an older downtown without a central tenanting agency.

Downtown rents are averaging $14 to $17 per square foot, up from $8 per square foot in 2010. Downtown tenants include a number of local, independent, and start-up businesses; and the city is becoming an affordable destination for specialty businesses.

Commercial Corridors

Delaware's commercial corridors exhibit a broad range of conditions and rental structures. Older centers along Route 23 see rents in the $12 to $14 range per square foot, with anchor stores (Wal Mart, Kroger) paying rents starting at $10 per foot. Nutter Farm rents (Meijer) range from $14 to $15 per foot, while businesses in the Kroger Center (Route 36/37) pay rents in the $12 to $14 range. These rents compare with those in newer centers like Glenn Wood Commons, where rents approach $21 per square foot. This newer center is 70% leased to date. Otherwise, there is only limited available retail/commercial space in the city's corridors, such as the 12,000 square-foot former Metro Fitness location. There is some new construction (Coughlin's Crossing) which will add 200,000 square feet of much-needed competitive, new space to the market.

Residential

A Housing Market Analysis is being conducted as an input to the planning process. This analysis will provide a more complete review of market conditions as well as forecasts of housing market potential and strategies for housing development or rehabilitation in the city. Findings from an initial review of existing housing market conditions are provided below. The primary housing market area from which significant demand is drawn is defined to include all of Delaware County.

Delaware Neighborhoods & Market Drivers

Delaware has a number of distinct residential neighborhoods, built in successive waves throughout the city's history and offering a diversity of housing stock at varying prices. Several of these neighborhoods are described below based on field reconnaissance and input from area residential brokers.

- **Northwest Delaware**, the city's historic district, has spacious and attractive Victorian-era homes as well as smaller bungalows and cottages with diverse prices ranging from $60,000 up to the $600,000s. The neighborhood is attractive due to its historic housing stock and proximity to Downtown Delaware.

- **The East Side** has 1920's era housing stock ranging in price from $80,000 to $160,000 on average. Housing conditions in some areas are below average and neighborhoods could benefit from reinvestment.

- **The University District** adjoins the Ohio Wesleyan campus and its proximity is attractive for university faculty and staff. Homes range in price from $110,000 to $250,000 on average.

- **The West Side** offers newer subdivisions with homes in the $170,000 to $370,000 range.

- **The Marvin Lane Park / Delaware Meadows Area** has smaller, post-war (1950s) era homes in the $90,000 to $140,000 range. These neighborhoods are located near Delaware's southwest industrial area, where some of the residents have been employed. Like the East Side, some of the neighborhood housing stock and infrastructure could benefit from better maintenance or reinvestment.

- **The Southwest Side**, further out of the city, offers new homes in subdivisions like Carson Farms ($225,000 to $350,000 range) and others.

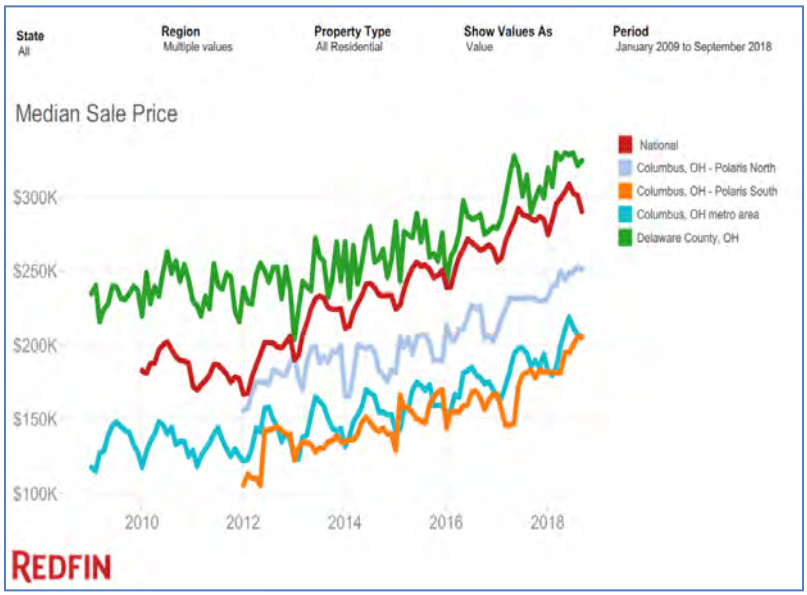
Brokers have observed that a desire to be located proximate to certain high-performing schools like Smith Elementary School, help drive the market for family housing. Some Millennial and Baby Boom generation buyers are seeking "less grass," as they purchase homes in more walk-able neighborhoods with maintenance-free housing.

Prices and Trends

As noted above, the primary housing market area includes all of Delaware County. Median Delaware County housing prices are $325,000, or about 59% higher than the MSA median of $205,000. However, Delaware County prices are

increasing at a slower pace than those in the metro area as a whole, with Delaware prices up by 35% since 2009 compared with 78% metro-wide. Delaware County housing prices have been increasing roughly in tandem with (but slightly higher than) the national housing market since 2013, according to data supplied by Redfin. The Columbus metro-wide market has lagged behind both the national and Delaware County median prices.

Chart 7

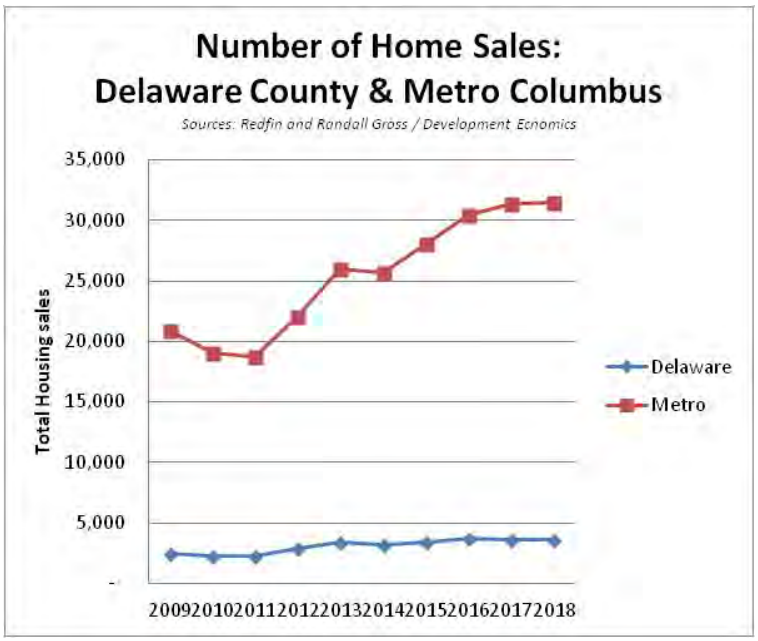


Rentals. Rents in Delaware's downtown area are averaging $14 per square foot for apartments. About 90% of the existing downtown apartments are occupied. Ideally, there would be a target of 95% occupancy in newer, centrally-managed apartment complexes. But 90% is a fairly healthy indicator of the downtown market, since many of these are upper-floor units in older buildings that are not centrally managed. More detailed information on for-sale and rental prices in the city of Delaware and countywide will be provided as input to the full Housing Market Analysis.

Sales Volumes

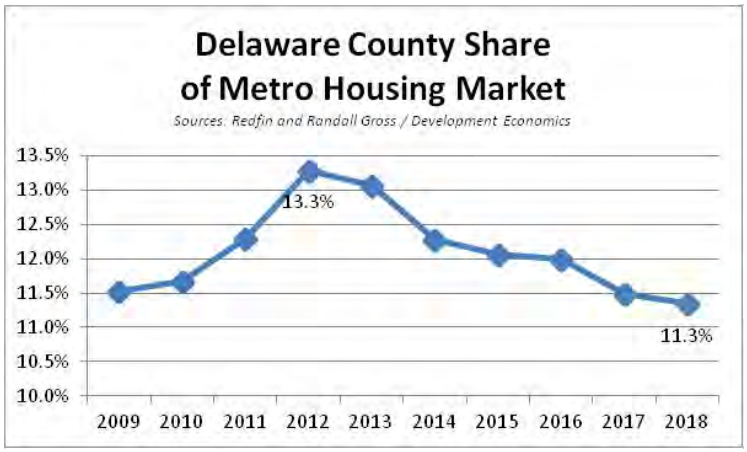
Delaware County has seen a more stable market than the metro Columbus area as a whole since 2009. The Columbus MSA has averaged about 25,400 sales per year since that date, with Delaware County comprising about 12% of that market (3,000 per year) on average. Overall home sales in Delaware County, compared with the Columbus Metro, are shown in the following chart, below. Again, Delaware County comprises the primary housing market area from which Delaware City derives much of its housing demand. More detailed information on sales within the city of Delaware will be provided as input to the full Housing Market Analysis.

Chart 8



Delaware County's share of regional sales volume peaked at 13.3% in 2012, but has fallen since that year to about 11.3% in 2018. As such, the county's share of the market has returned to its recession-era level. This is not to say that the county's sales volume has fallen over time, but only that its share of the regional volumes has returned to previous levels.

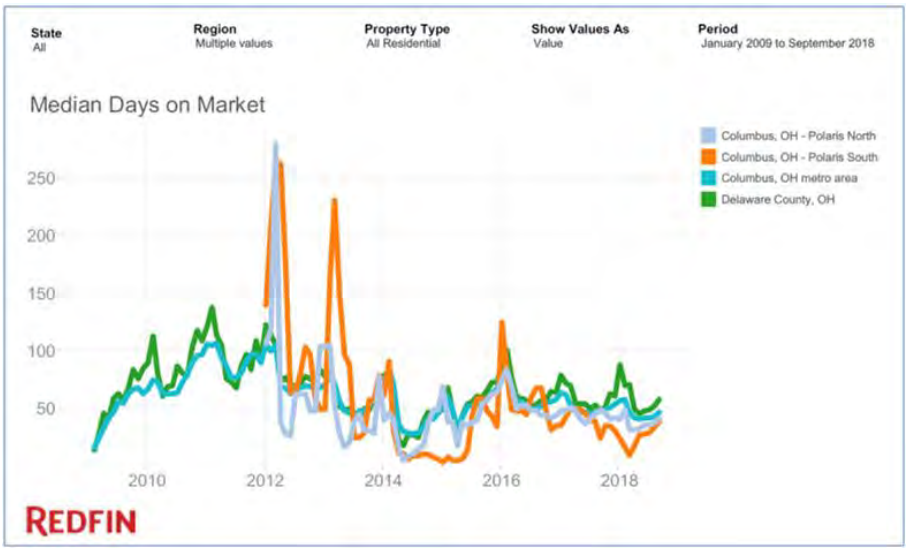
Chart 9



Time on Market

The amount of time required to sell a house is an important indicator of the direction of the housing market. The median number of days that houses stay on the market fell precipitously between 2012 and 2015, and has remained relatively stable since then.

Chart 10

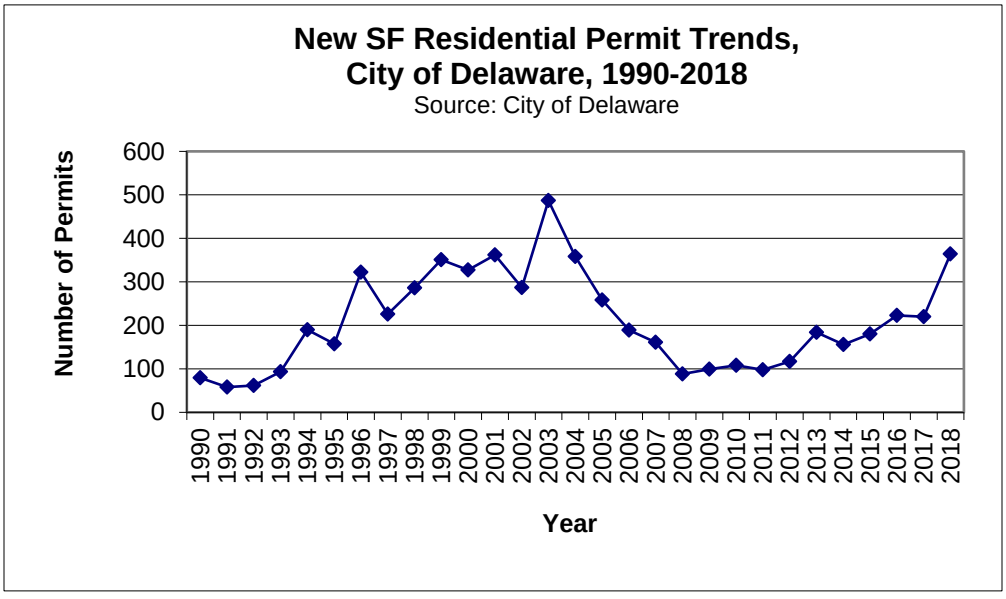


The amount of time required to sell a house is slightly longer in Delaware County than in the Columbus MSA as a whole. "Spikes" in selling time (as in the Polaris area) occurred when there were large new projects that opened up sales on the market, with the flood of new supply increasing the time required to sell homes.

Construction

Single-family housing construction increased gradually between 1990 and 2003, when the market appears to have peaked in Delaware.

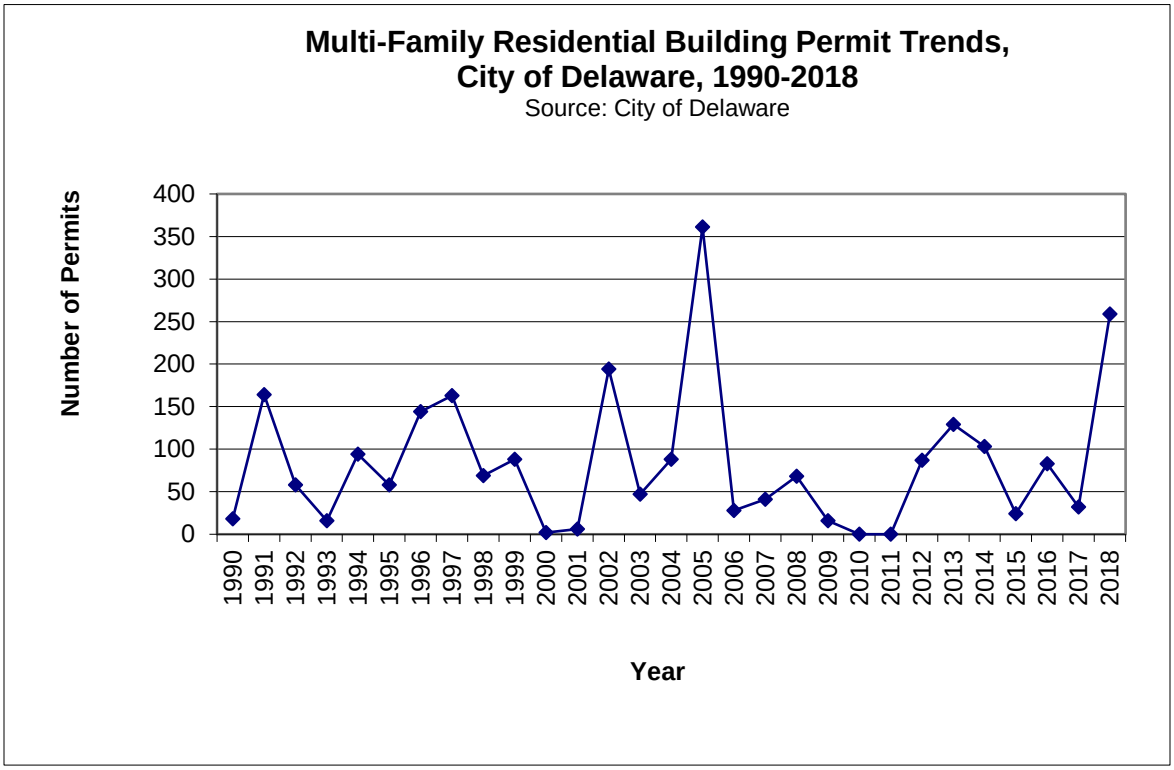
Chart 11



Single-family residential construction continued to fall between 2003 and 2008, when the city's and nation's housing market reached a nadir and began a slow recovery from a deep recession. While Delaware's single-family housing permits jumped to 364 by the end of 2018, single-family construction has still not met the peak of 487 units permitted at the peak in 2003.

Multi-family construction has fluctuated from year-to-year as a single project with multiple units can impact greatly on the overall permit activity in a given year. The largest number of multi-family permits was issued in 2005 at more than 350. And, 2018 saw the second-highest number of multi-family permits, with 259.

Chart 12



Overall, the high number of multi-family permits coincided with the continued growth in single-family units to generate a high number of overall residential permits in 2018. This convergence of single- and multi-family permits is not likely to happen very often, based on the city's historic trends.

Delaware Together

Southwest Industrial Area Opportunities Assessment







January 28, 2020
Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

This report presents findings from an Opportunities Assessment for business and real estate development in the southwestern quadrant of the city of Delaware, as input to broader economic development and city-wide planning, especially future land use planning. A Baseline Economic Assessment (Report 1) provided an overview of existing economic and real estate conditions in Delaware and the regional context. This assessment takes the analysis one step further to identify possible economic development opportunities for this sub-area. The assessment does not constitute a detailed target industrial or real estate market analysis but does provide conceptual input based on a review of the area's competitive advantages and existing conditions.

Section 1 of this report provides a review of existing conditions within the southwest sub-area, with particular attention to the existing industrial business base and business operating conditions. Section 2 provides findings from a general opportunities assessment which drew from the market overview, existing conditions assessment, and input from key business stakeholders. Section 3 applies those findings to concepts for land use and development within the sub-area, focused on refining the key economic development nodes and corridors.

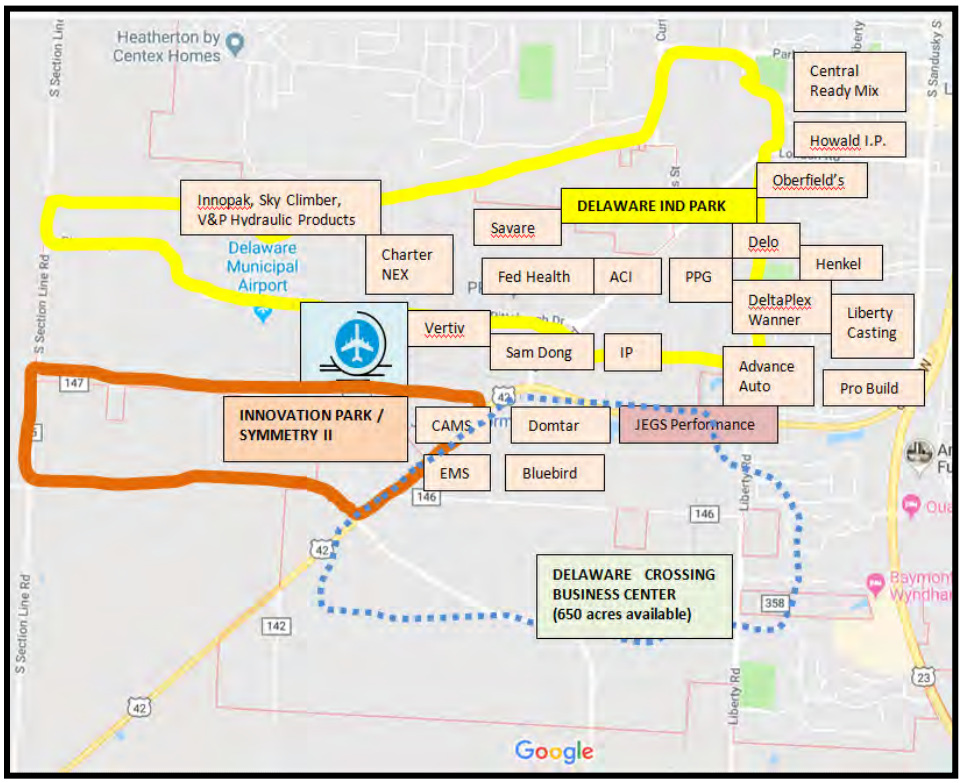
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Section 1. EXISTING CONDITIONS & SITE ANALYSIS

This section provides an assessment of existing physical conditions and a site analysis of the southwest area of Delaware. While other industrial nodes like the Kroger Distribution Center on the east side are critical to Delaware's economy, this report focuses primarily on industrial areas in the southwestern quadrant of the city. The assessment examined the existing industrial business conditions and the relative competitiveness of the area for attracting and retaining industry. Existing industrial parks and industrial business areas are identified and inventoried. The business base is categorized in terms of key clusters and typologies. The Site Analysis examined factors impacting on the competitiveness of the area as a business hub. Business input on operating conditions and opportunities was gathered through surveys and interviews with area businesses. Findings from these various assessments and inputs are summarized below.

Industrial Parks & Areas

The southwestern quadrant of Delaware has three areas that are loosely categorized or marketed as the "industrial parks" delineated below: Delaware Industrial Park, Innovation Park and Delaware Crossing Business Center.



Delaware Industrial Park is the oldest and most established of these three areas. While delineated on maps, there is little visible physical demarcation or definition of this area as an "industrial park," per se. Still, a number of the city's large and small industrial businesses are clustered here or nearby, including Oberfield's, Liberty Casting, PPG, ACI, Savare, ACI, DeltaPlex/Wanner, Henkel, Delo, ProBuild, Advance Auto, IP, Sam Dong, Vertiv, and Charter NEX. Also located here are newer tenants in the Delaware Municipal Airport area including Innopak, Sky Climber, and V&P Hydraulic Products. The park is generally defined for the purposes of this analysis as the "triangle" bound by Liberty Road (east), U.S. 42 / Pittsburgh Drive (south), and the railroad (north/west). This area extends along Pittsburgh Drive to Section Line Road and includes the airport.

The newer **Innovation Park** (including Symmetry II) is located on the south side of the Delaware Municipal Airport, generally bound by Airport Road (north), South Section Line Road (west), Sawmill Parkway/Slack Road (south), and U.S. 42 (east). This area has been pro-actively marketed for industrial uses and current businesses there include CAMS, EMS, Domtar, and Bluebird.

The **Delaware Crossing Business Center** is still conceptual as a future business location, with 848 acres potentially available for development on the south side of U.S. 42 (including 133 acres located in the city). The boundaries would be generally defined as U.S. 42 (north and west), Liberty Road (east), and south of Sawmill Parkway (south to Bunty Station Road). At present, the only large business operating in this area is JEGS Performance.

"Central Industrial Area"

In addition to these loosely defined industrial business parks is an undefined area of central/southwest Delaware that includes several industrial businesses and related activities plus a residential neighborhood that has probably housed workers in area industries.



This area is roughly defined as bounded by West William Street (U.S. 36, on the north), Curtis Street (west), London Road (south), and South Liberty Street (east).

Among the businesses in or near this area are Central Ready Mix, tenants in the Howald Industrial Park, AEP, Loeb Electric, Sims Brothers Recycling, MWD Logistics,

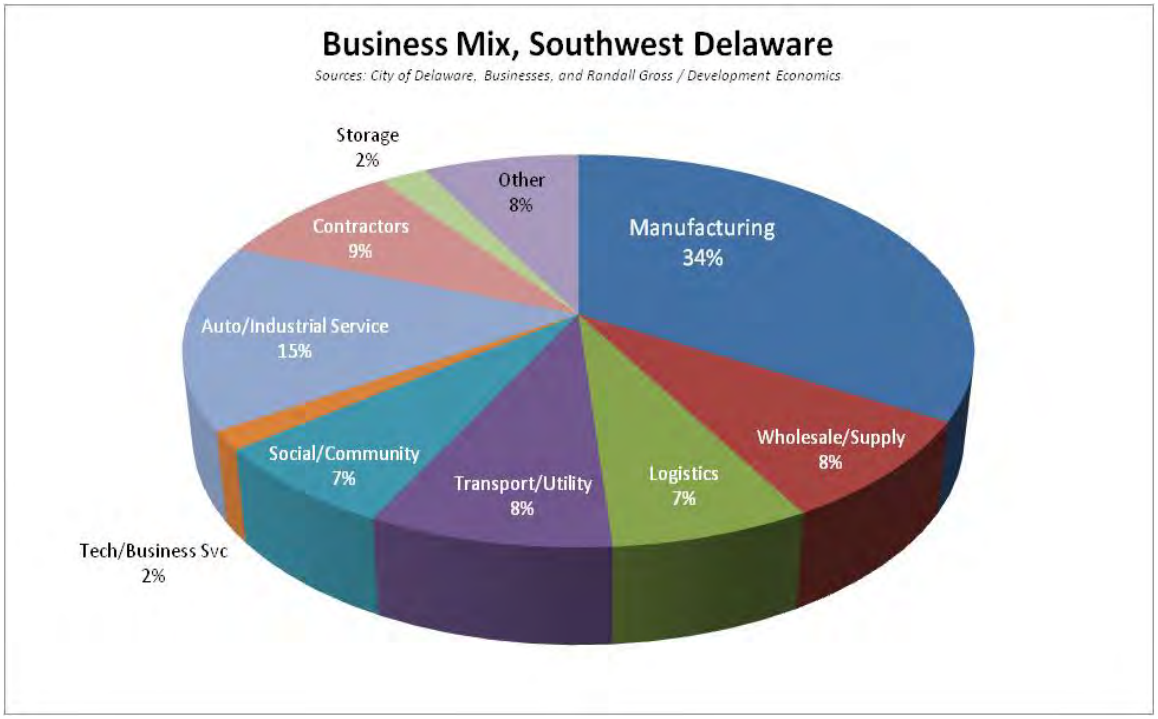
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Assurance Technical Services, Mail Pro 1, and Benchmark Woodworks, among others.

Inventory & Business Base

An inventory was conducted of existing uses within this area, with a focus on industrial and other businesses. The inventory identified approximately 130 diverse businesses, with the largest share (34%) being in manufacturing.

Chart 1



About 15% are in automotive and other industrial services, comprising the second-largest group of businesses. There are a similar number of contractors, wholesale suppliers, transportation & utility companies, social & community service providers, logistics companies, and other businesses, each comprising approximately 7 to 9% of the total. There are also a handful of technical/business service companies and storage services. Overall, the area can be characterized as being a manufacturing center, with ancillary transportation, supply, and industrial service providers.

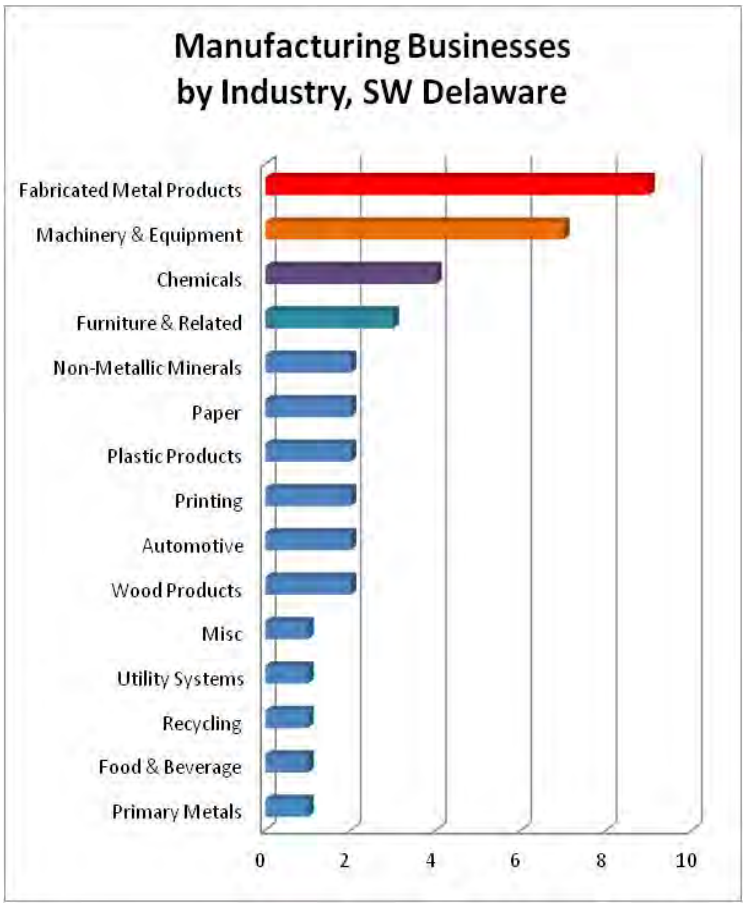
Manufacturing

The manufacturing base occupies a total of 3,034,800 square feet of space, based on data collected by the City of Delaware. This manufacturing base represents about 3,000+ employees and includes nine of the city's 12 largest employers. Major manufacturing employers include Domtar, PPG, Vertiv, Midwest Acoust-A-Fiber, Liberty Casting, International Paper, and Sam Dong.

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The manufacturing businesses were further disaggregated by industry, as summarized below.

Chart 2

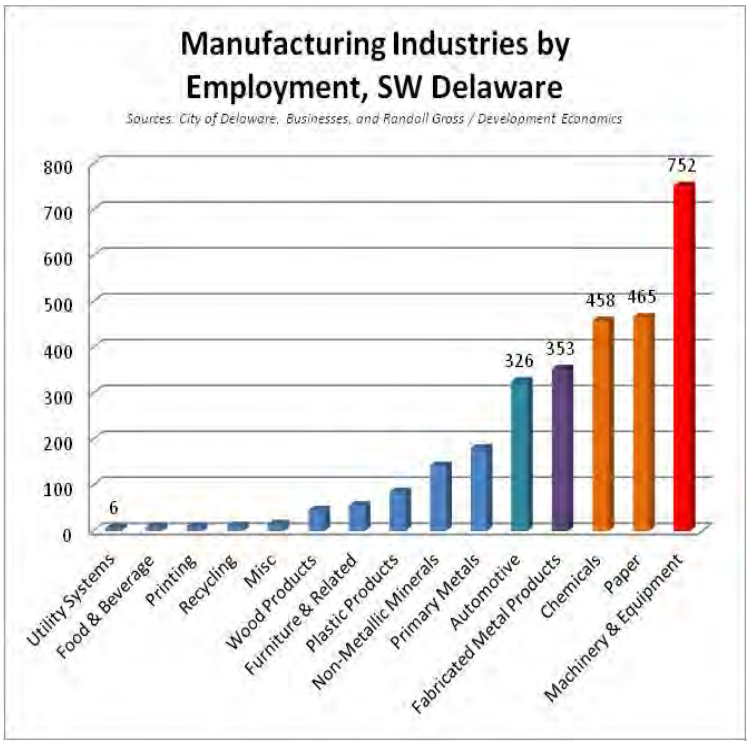


The largest number of manufacturing businesses is engaged in producing fabricated metal products, followed by machinery & equipment and chemicals. Among the industries represented by at least to two or three companies in this area are furniture/related, non-metallic minerals, paper, plastic products, printing, automotive, and wood products. There are also a handful of companies in other industries including utility systems (design and installation), recycling, food & beverage, and primary metals, among others.

These companies produce a very diverse selection of specific products ranging from personal hygiene products to chicken pluckers: *Millwork, Hygiene Products, 3-D Printing, Polyethylene Films, Chicken Pluckers, Adhesives, Signs, Ice, Machine Parts, Aggregates, Heat Exchangers, Cardboard, Paints, Portable Water Systems, Hydraulic Cylinders, Floor Molding, Heat Exchangers, and others.*

Employment in the area's manufacturing industries is concentrated in the production of machinery & equipment, with more than 750 employed in that industry. Close to 500 each are employed in paper and chemicals production.

Chart 3



Another 350 are employed in producing fabricated metal products and 330 in the automotive industry. More than 100 employees work in each of primary metals and non-metallic minerals, but less than 100 work in most of the other industries.

Transportation & Logistics

The southwest area is also home to several transportation hubs and transport-related businesses. Delaware Municipal Airport provides an anchor for the area, with Jetstream, Spencer Aviation, and Shamrock Air Service among the associated service providers. A master planning process is underway for the airport. Delaware Area Transit Authority (DATA) s also based in this area. Transport-related businesses include Delaware NEX Transport, Henderson Trucking, U-Haul, Buckeye Coach, and others.

Distribution. There are several distribution companies in the area, occupying a total of 1,508,000 square feet, based on the City's data. These companies employ about 1,660 and include Advance Auto Parts Distribution, JEGS Automotive (a mail order/Internet seller/distributor of automotive parts with

a 350,000 square-foot warehouse), Wanner Metal Worx, MWD Logistics and others.

Wholesale Trade / Supply

Wholesale trade and supply businesses in the area supply a mix of electrical equipment, geo-tech products, carpet & flooring, industrial chemicals, dental supplies, water softener equipment, and other products.

Site Analysis

Field reconnaissance and a site analysis were conducted to assess the area's physical conditions and general marketability as an industrial business location. Key observations from this analysis are summarized below.

Delaware Industrial Park & Central Industrial Area

These older industrial areas generally lack physical definition and pro-active marketing oriented to their specific competitive advantages. The "Central Industrial Area" around Liberty, London, and Curtis in particular lacks any definition as a designated and programmed industrial node. There are several aging multi-tenant industrial facilities in this area that appear to have declining appeal to companies seeking affordable but high-quality space.

Some of the area seems an odd mix of agricultural land with a rural character, factory housing, and spotty site-specific industrial development. There is undeveloped land but arranged in a somewhat inefficient and piecemeal patchwork, and much of this land is not available for sale. There is generally a lack of transition between industrial and non-industrial uses. As an investor, it would be challenging to determine how and where to develop within this context.

Pittsburgh Drive has provided an attractive gateway and has succeeded as an industrial location for high-profile global brands like PPG and International Paper, but its traditional "pad" site development format is largely built-out and favors "drop in" industrial development that may not fit the model for how most light industrial companies seek space in today's market. Many companies are looking for industrial space with flexible fit-out that is ready for move-in, rather than greenfield sites to construct large, purpose-built manufacturing plants.

Innovation Park/Symmetry

The newer industrial development areas south of the airport have also succeeded in attracting businesses. But the area generally lacks amenity value and such issues of character and amenity environment may impact on the long-term marketability of the area to firms that need to recruit workers from outside of the city. Like Pittsburgh Drive, this area is being developed in a way that is

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consistent with the traditional "industrial park" or suburban business park model with separated pad sites for businesses and a lack of walk-able amenities for workers. Such amenities could include restaurants, breweries, personal services and other businesses to serve the needs and lifestyle of workers.

Delaware Municipal Airport

The airport is an important asset within the Columbus region, providing opportunities as an amenity for various types of businesses. Jim Moore Field is home to approximately 100 aircraft and handles about 40,000 operations per year on its 5,800-foot runway. According to the City's web site, the field's Wide Area Augmentation System (WAAS) is among the several aviation upgrades including terminal and lounge improvements that have enhanced the airport's capacity for diverse operations and improved comfort for users.

Access Challenges

While the southwest area offers transportation access through a general aviation airport and several federal highways (U.S. 42, U.S. 23, and U.S. 36), as well as the new Sawmill Parkway, it is poorly located to provide direct access to the interstate highway system. This issue alone limits the area's capacity and marketability for distribution and manufacturing uses that are highly dependent on just-in-time delivery. That being said, access to Interstate 71 is within nine to ten miles or 25 minutes, which can provide some benefit.

The area also lacks direct access to executive and middle-management housing, which will be important in attracting companies to this part of Delaware. Certainly there is housing for young families and workers to the north and south-east of the area, but there are limited opportunities and amenity-rich communities for higher-level management within a short drive. At the same time, Dublin and southern Delaware County are located within a relatively short commute. Ultimately, however, having housing for executives in Delaware can help enhance the likelihood that they will locate their business there.

Business Input

Surveys and interviews were conducted to gather input from a sample of businesses on the challenges and opportunities relating to a Delaware location (with particular attention to southwest Delaware). The general consensus was that Delaware provides several advantages relating to location (centrally located within Ohio and the north Columbus area) and affordability (relatively low real estate costs compared to other areas closer in to Columbus). But Delaware lacks the necessary labor pool (un/semi-skilled and skilled production workers) to support significant industrial growth. Key issues relate to the lack of amenities, housing, and the environment that is created around industrial zones for attracting workers to Delaware.

Delaware as a Location

Representatives of the area's industrial companies were asked why they located in Delaware. In general, they either started the business there or purchased an existing plant in Delaware (so it was already there). Some of the businesses consolidated existing business in Delaware that had been in several locations (including Delaware) before. Finally, some businesses noted that Delaware is proximate to their client or customer base, such as the Honda plant in Marysville.

Key Factors in Location Decisions

Business representatives listed the key factors they have considered in their location decisions. Among them are location and market access, access to low/semi-skilled labor, low operating costs & taxes, and safety & security. They perceive that Delaware ranks fairly high on all of those factors with the exception of access to a large labor pool.

Growth Plans

About 30% of the surveyed and interviewed companies had plans to grow their labor force, as of spring 2019. Trade and other factors placing pressure on the manufacturing sector in the current market may have pushed that number down since that time.

What Assistance Could Help Local Businesses?

Business representatives agreed that more job readiness and basic life skills training is needed to enhance the local labor force's employability. Given the tight labor market and the lack of a large labor pool in Delaware, employers are trying to locate workers who meet the basic standards of showing up on time for work, prepared and ready to work. There was also a need stated for better transit or public transportation to get workers to their places of employment. Also mentioned was a need for more affordable workforce housing to attract and retain quality workers in Delaware.

Southwest Industrial Land Use

Finally, business input was sought on how best to plan for industrial business development in southwest Delaware. On this point, there appear to be two opposing minds. One group felt that there is a need to "encourage development of distinct nodes based on the character of the use for marketing and industrial development purposes." The examples that were given included some sense of marketing and physical definition for tech uses, heavy manufacturing, and a "commercial / light industrial mix."

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Another group felt that there is a need to "keep all industrial areas exclusively for industrial uses," and not let infiltration of mixed-use into the industrial zones. It may be that these two thoughts are not mutually exclusive, since there can be sub-areas that are oriented more exclusively to heavy and "noxious" industries that may otherwise have a negative impact on other types of uses. This separation of noxious uses is, in fact, how zoning originated in the United States. Ultimately, representatives of diverse businesses agreed that there is a need for more physical definition for industrial business areas in southwest Delaware, whether for marketing, investment, or separation of certain uses.

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Section 2. OPPORTUNITIES

This section provides input on conceptual opportunities for economic development within the southwest portion of Delaware. Identification of opportunities was based on the economic and real estate baseline analysis, site assessment, review of the existing business base, stakeholder input, and the prior target industries identified for the city of Delaware as part of the 2014 Delaware Economic Development Plan.

Current Target Industries

(2014 *Delaware Economic Development Plan*)

The 2014 *Delaware Economic Development Plan* identified primary and secondary targets for business recruitment and retention in the city. The primary target industries were mainly focused on targeting jobs for residents of Delaware based on their skills and the need to reduce commutation out of the city. Among the primary targets were "boutique" manufacturers; research & development; other professional, scientific & technical services; finance & insurance; wholesale trade; and information services.

Secondary targets were also identified, mainly as an approach to fill the gap in available jobs in Delaware in these sectors. The secondary targets identified in the 2014 *Plan* included retailers and arts, entertainment, and recreation employers.

Airport – Related Economic Development

There is also an opportunity within the southwest portion of Delaware to focus on the airport as an asset for attracting business to the area. Certain types of economic activities are attracted to locations near general aviation airports. These activities are discussed below as a basis for planning and economic development associated with the airport and surrounding areas.

Extensive and Immediate Travel Needs

Certain types of companies have management and employees with extensive and immediate travel needs that are met through direct proximity and access to private planes. Among the types of companies that form a target base for recruitment in southwest Delaware could be the following:

- Consulting, law, medical, advertising, and financial services firms
- Transportation services companies
- Agri-businesses

- Executives and boards of manufacturing companies, particularly those engaged in electronic equipment manufacturing, miscellaneous machinery manufacturing, and other selected industries.

High-Attention Marketing

Certain firms require a high-level of personalized attention for their clients as well as frequent visits by clients and potential customers. These firms have a high demand for private, general aviation services.

General Aviation Freight

There are several types of manufacturing companies that tend to utilize the services of general aviation airports on a regular basis because of the type of product or specific requirements for distribution. The factors and types of manufacturing businesses associated with high general aviation freight use are the following:

- Critical Needs: Medical emergencies and supplies
- High-Value Product: High-tech electronic equipment & parts, medical equipment, precious stones
- Perishables: Seafood, fruit

Objectives & Opportunities

Several objectives have been defined for economic development within Delaware and the southwest area of the city, and matching opportunities are identified that respond to those objectives. As noted earlier, the City has already identified target industries, so this effort is meant to refine and append those opportunities that may be best suited to the southwest portion of the city.

Diversification

There is a need to diversify the city's economic base and the business base within the southwestern portion of Delaware. Diversification and balance helps reduce or mollify the impacts of a downturn in any one sector. Diversification can also lead to collaboration and new product development, where diverse companies work together to share technologies for example on open platforms. Key to Delaware's diversification is to build on the city's existing strengths. Those strengths include its central location and its clusters in **transportation** and **construction**. Also a key strength is Delaware's **airport** as a marketing anchor for recruiting the types of businesses identified above that are attracted to general aviation airports. Enhancing the airport's services and "perks" for patrons will increase its competitiveness and thereby, the business recruitment potential for southwestern Delaware. This concept is developed further later in this report.

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Also important to diversification is the need for collaboration, including institution building and partnering among and between businesses in the area. Creating a southwest Delaware business consortium that promotes cross-pollination of ideas between businesses will be helpful. Finally, there is the opportunity for more interaction between consumers and production, such as through food & beverage as well as the "maker" culture that brings an audience and consumer appetite for local products.

Recruiting Resident Employers

The 2014 *Plan* initially identified a need to recruit businesses that employ local residents, since there is significant out-migration of residents and reverse in-migration of workers to Delaware (as noted in the Economic Baseline Assessment). Based on the Baseline Assessment, several specific industries are recommended to augment the target industry effort, including the following:

- Management Services
- Scientific & Technical Services, with a more specific emphasis on Industrial Testing, which could be recruited to the southwest area.
- Finance & insurance back office processing and services

Strengthening Brand & Identity

There are opportunities to enhance recruitment power by strengthening the southwest area's brand and identity. A key element of this strategy would be to define and delineate districts and nodes. Also important is to enhance amenity value and create more "cache" for the location. Finally, implementation of Delaware's existing *Branding & Wayfinding Strategy* will help reinforce these efforts.

Section 3. DISTRICTS, CORRIDORS & NODES

Based on the site analysis, input from businesses, and opportunities assessment, it was determined that there is a need to define specific districts and nodes for industrial business development. Strategic recommendations are therefore made for physical definition as well as marketing concepts for several sub-areas within the southwest portion of the city. Specific recommendations are made for the Delaware Industrial Park, the Central Industrial Area, and the Sawmill District (Delaware Crossing), as defined earlier in this report.

Strengthen Delaware Industrial Park

Several strategies are recommended for strengthening the area defined as the Delaware Industrial Park in southwest Delaware. The following strategies relate to general branding; to physical improvements that help to define the area, site assemblage and creating amenity value, and to establishing a Delaware "Concierge" Airport Hub.

Branding

First, it is recommended that the area be branded and marketed in association with the transportation and electronics industrial sectors, since these sectors are represented by clustering that suggest a competitive advantage for the area in attracting those industries.

Nodes, Gateways and Physical Improvements

It is recommended that commercial/mixed-use nodes be defined and strengthened along London Road at the intersections with Pittsburgh Drive and at U.S. Highway 42 West. These nodes can help focus attention so that the area does not seem as disparate and ill-defined. Ultimately, London Road is the main industrial artery through this area, and every effort should be made to enhance the image along this corridor. London Road should have the same character, or at least a character and image that is equally attractive, to Pittsburgh Drive. Creating a sense that one has entered a more deliberate, master-planned industrial area, would help enhance the image of this corridor and the industrial sites and buildings adjacent to it. Gateway features and signage should be unique and consistent within the Delaware Industrial Park area, especially along London Road and within the nodes. Landscaping and moderate buffering at the right locations (such as between heavier industrial and residential uses) would help "upgrade" the image of the area and enhance the overall aesthetic context.

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Assemble Sites and Create Amenity Value

As noted earlier, large portions of this area seem to have no coherent land use pattern, with agricultural and undeveloped land mixed haphazardly with industrial buildings, worker housing, and occasional commercial uses. It is recommended that the City consider working with property owners to facilitate a collaborative, shared-equity based site assembly strategy among private property owners that helps to create a more coherent collection of parcels for development or redevelopment.

The City could offer to examine the market and investment potential for use of these sites and to develop a request for proposals from developers on behalf of the owners, who could work in a shared equity arrangement with a prospective developer or user. The City and its Economic Development office would also help work on an infill development strategy focused on recruiting compatible uses along London Road. As part of this strategy, the City would work to define heavy industrial areas that are protected from encroachment through zoning and other regulatory mechanisms.

The City would also work with non-profit partners on projects as recommended in this comprehensive plan that help to create amenity value through delineated greenways and fitness trails, anchored by the new YMCA.

Establish Delaware Concierge Airport Hub

There is the opportunity, as identified in the previous section, of establishing a "Concierge Airport" hub associated with Delaware Municipal Airport. There would be more focus on providing corporate and personal services as part of this concierge concept that would appeal to the target clientele identified in the previous section. For example, a partnership would be formed with the nearby YMCA to provide member access to fitness facilities for those using the airport. On-site business and personal services would also be made available that are targeted to companies using the airport facilities.

The City's Economic Development office would examine opportunities for creating transportation, construction, and electronic equipment manufacturing and distribution clusters relating to recruitment of airport-dependent businesses. Economic Development would also identify institutional, government, and corporate partnerships in establishing technology anchors such as an incubator, associated with the airport. Again, the focus of the anchor would be to recruit entrepreneurs and small tech businesses in the transportation, construction, electronic or medical equipment arena that could be nurtured locally and graduate into larger spaces in the industrial park.

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Redefine Central Industrial Area As Mixed-Use Urban Industrial District

The central industrial area, as defined in this report, is the least defined of the existing industrial zones within the southwest area of the city. Here is an opportunity to create a more urban, mixed-use industrial district that provides amenity value and positively impacts on the surrounding residential neighborhoods. Key components of the strategy for this area including the following:

Create Area Master Plan

This area could be master planned as a distinct neighborhood, including a vision for infill development. The master planning effort would work to reduce conflict between uses while enhancing the overall aesthetics and amenity value of the area.

Corridor Streetscape Improvements

As part of the master planning effort, streetscape improvements would be integrated that would enhance the aesthetic appeal of the area. Streetscape efforts would be focused in he London Road Corridor to Sandusky Street, and along Curtis Street.

Integrate New Uses at Key Nodes

Protect industrial use but integrate commercial and residential where appropriate to create mixed-use environments. This area is relatively close into downtown Delaware and could become one of the city's exciting, mixed-use urban neighborhoods. New uses would be concentrated in a "signature" mixed-use node located at London Road and Liberty Road. The Howald Industrial Park would be redeveloped for mixed-use. There is a sizeable, undeveloped parcel at the front of Howald I.P. that could be developed as part of the initial phases of a mixed-use development at this node. The market to support such development would need to be tested.

One of the possible opportunities for integrating commercial / industrial "maker" uses into this area would be through food & beverage facilities including a brewery or distillery. A brewery, along with restaurants, could help establish a hub for residents and workers in southwest Delaware and could also attract other consumers from throughout the city and beyond. There is also the opportunity to integrate rental apartments or other residential into these mixed-use nodes, as tested though the residential market analysis and discussed in Report 3.

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Convert Office to Maker/Tech Space

Low-performing office space in the area might be converted to use by makers, small tech firms, and entrepreneurs. This space might provide an opportunity for move-up among incubator firms or small companies looking for affordable start-up space in the area, including those originating in other parts of the northern Columbus market. Again, having amenities like a brewery and restaurants will help in marketing this space and the area in general as a location for small start-ups, makers, and entrepreneurs.

Establish Master Plan for Sawmill District (Delaware Crossing)

The Delaware Crossing Business Center or Sawmill District should be master-planned to help guide development and provide investors with a vision for the area. As a framework for planning, this area has been disaggregated into three sub-sections and described in terms of their marketability for various uses. The three sections include the area West of U.S. 42, an "Amenity Node" located at Sawmill Parkway and U.S. 42 West, and East of U.S. 42.

West of U.S. 42: "Tech/Industrial"

The area west of U.S. 42 is already developing as a mini-business park area, incorporating Innovation Park and Symmetry II. There is an opportunity to build on the industrial technology testing cluster and to promote advanced manufacturing in this area. The area could benefit from branding and services associated with the "Concierge Airport" concept, since it is situated adjacent to the airport property and could potentially offer a south entrance to the airport.

"Amenity Node" at Sawmill and U.S. 42 West

Development of a mixed-use node at Sawmill Parkway and U.S. 42 West is recommended to provide amenity value to this southwestern "corner" of the city in support of both residential and economic development. A mixed use node at this location would also provide a southern "gateway" into the city's industrial business area. The node would offer convenience and shopper's goods retail, personal services, and restaurants if proven to be supported by the market. There is also the possibility of integrating workforce residential development into the node and establishing an attractive environment that would attract workers to live in the area.

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East of U.S. 42 "Corporate" Corridor

The portion of the Sawmill District east of U.S. 42 would have a more "corporate" business park character, although it would still accommodate a mix of industrial uses. The City would help facilitate site assembly by working with area property owners, similar to the effort recommended in the Central Industrial Area. Light manufacturing and back office administrative service uses would be among the types of businesses recruited to this area. Recruitment targets would include management consulting services in human resources, marketing, and process management; as well as firms engaged in logistics and associated consulting, consistent with the types of companies likely to locate near a general aviation airport. The district would have consistent character and design throughout, with branded elements and marketing.

Summary

The southwestern portion of Delaware is dominated by industrial uses, which fan out from downtown along U.S. Highway 42 West and nearby streets. Older industrial areas within the "Central Industrial" triangle formed by London Road, Liberty Road, and U.S. 42 accommodate a handful of heavy industrial facilities alongside residential neighborhoods and under-utilized buildings and land. The Pittsburgh Drive corridor succeeded as a suburban-style industrial park that is now largely built-out with large, single-use buildings. The growing Delaware Municipal Airport anchors this corridor. Newer areas south of the airport have attracted several light industrial uses. JEGS placed its headquarters south of 42 and plans for land along Sawmill Parkway have envisioned more industrial development further south.

The competitiveness of southwest Delaware has changed over time as interstate highway access has attracted industrial development away from older highway corridors like U.S. Highway 42 West. That being said, Delaware's growing airport and Sawmill Parkway provide opportunities for attracting businesses through higher-value environments and amenities. This report has recommended strategies for creating more amenity value through development of mixed-use nodes and residential uses along Sawmill Parkway, and by focusing amenity-based marketing for tech and high-value industrial uses near the airport. Meanwhile, recommendations are also made for infill and redevelopment of older buildings and land within the Central Industrial area of southwest Delaware. The older areas near the city's core provide an opportunity for recapturing a more "urban" mix of maker space, emerging tech uses, residential, and retail that could attract younger workers to the area. Companies tend to follow the work force in a tight labor market, so attracting a young workforce helps in securing opportunities for business development.

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Delaware Together

Residential Market Analysis







January 21, 2020
Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

A Residential Market Analysis was conducted for the city of Delaware as an input to Delaware Together comprehensive plan. The market analysis helps inform future land use planning, especially within several key sub-areas of the city. But the analysis also informs economic development efforts, where housing is a key issue impacting on the city's overall competitiveness for recruiting business. Existing housing conditions and overall market trends were analyzed as input to a Baseline Report produced earlier. The market analysis in this report forecasted the housing potentials in the city and defined specific products and sub-area development concepts.

Section 1 of this report examines housing market drivers and defines the housing market area for Delaware. Section 2 provides findings from the housing demand analysis, which forecasts demand based on various factors impacting on the housing market area. Section 3 determines Delaware's capture of demand within the competitive market, thus defining Delaware's housing development potentials within the next five to seven years, which is a reasonable forecast period after which market projections are less reliable. Section 4 provides recommendations relating to the housing products best suited to meet the needs identified in the market, as well as development strategies for key sub-areas of the city.

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Section 1. HOUSING MARKET DRIVERS

This section examines housing market drivers, market niches and cohorts. Input from real estate professionals and lenders active in the Delaware housing market helped inform this discussion. The housing market area is also defined in this section of the report, in terms of its geographic parameters and various sub-markets.

Market Niches and Cohorts

Information collected from brokers, lenders, and project managers helped provide input on the key existing niches and cohorts within the Delaware housing market. Challenges and opportunities were identified through this engagement with stakeholders and also through field reconnaissance and assessment of existing housing market conditions.

Market Sources

Based on the information collected from the aforementioned stakeholders, Delaware tends to attract its market from a diverse set of demographic and geographic cohorts. Among these are first-time buyers, including many people born and raised in Delaware. A fairly substantial portion of Delaware's high school graduates tend to stay in the area, many of them renting for a time and then looking to buy once they have families. Those young families are often looking for housing priced in the $180,000 to $220,000 range, but many are priced out of the market because of a lack of housing in that range or (among the college graduates) because of student loan burdens, according to lenders. On the other hand, the housing on offer in Delaware has been successfully priced to attract homebuyers from locations closer to Columbus and other parts of the metropolitan area.

Overlapping with this group is the age cohort of Millennials, with singles looking for housing with "less grass" but families with children more apt to purchase traditional suburban-style housing. Families with children are often moving based on the reputations of certain school districts.

Another important age cohort includes empty nesters of the Baby Boom generation, some of whom are moving "down" within the Delaware market while others are moving to Delaware from other parts of the Columbus region. There is demand from this group for two-bedroom / two-bath condominium units, according to brokers. Many are moving to Delaware for lower income taxes and one-floor living arrangements. Some are moving in from more rural areas in order to downsize and be closer to medical and other services. Households in this

cohort appear to be seeking housing in the $200,000 to $225,000 price range, on average.

There are also local workers who live elsewhere (including more rural areas further out from the city) but would otherwise live in Delaware if they could afford it. As noted in the Economic Baseline report, a majority of Delaware's workers fall into this category of commuters from outside of the city, while most Delaware residents work outside of the city.

Brokers and others generally agreed that Delaware attracts those from Columbus or Franklin County for several reasons including, more affordability, lower income taxes, good schools and "small town living."

Affordability Gaps

Brokers and lenders agreed that there appears to be an emerging "affordability gap" in Delaware. Lenders estimate that 30% to 40% of prospective Delaware loan applicants cannot afford the note or don't have cash for down payment. Some have perceived that younger applicants have prioritized material possessions like cars and short-term consumables over housing; and they have noted that there may be a need for more homebuyer education.

Brokers suggest that new housing prices are not aligned with demand generated by first-time buyers, empty nesters, and local workers from within Delaware. They have agreed that there is a "lack of affordable housing" in Delaware for local residents and workers, even as Delaware's housing prices are found to be lower than those in Columbus and southern Delaware County. In other words, Delaware's housing is unattainable for many residents and workers in Delaware but is comparatively affordable for residents of Columbus who would have to pay even more for housing there. Land prices are increasing, leading some brokers to identify a need for higher housing densities to reduce the impact of land price. Some of these issues are commonplace nationwide and result from a growing economy, a maturing real estate market, and low unemployment (now at just 3.7% nationally). Compounding the issue of affordability is that Ohio Housing Finance Agency (OHFA) tax credit income thresholds have increased, with a fairly high range of $75,400 (in non-target areas) to $91,680 in target areas.

Key Market Drivers & Assets

Input from stakeholders, along with field reconnaissance and assessment of baseline conditions, helped to identify key assets and drivers for Delaware's housing market. Some of these assets are consistent with those identified by businesses as driving Delaware's economic growth and development.

- **Location and Proximity**. Being located in the growing Columbus Metropolitan Area is a key factor impacting on Delaware's overall competitiveness for housing. Unlike most other metro areas in Ohio, Columbus has a diversified economic base and appeals to young graduates, with a growing labor market. Columbus is also relatively affordable, when compared with other growing metro areas, and Delaware is even more affordable yet has good access to Columbus's growing job base. Delaware also has good access to regional shopping at Polaris, Dublin's corporate hub, and Columbus CBD (Central Business District), and Honda's large U.S. plant in Marysville. Finally, Delaware offers access to a general aviation airport for executives and others with private planes.

- **Institutions**. Several colleges are located in Delaware that graduate young people into the labor market and create opportunities for housing. Ohio Wesleyan University and its 1,600 students are an important asset for Delaware as is Methodist Theological School of Ohio and nearby Columbus State Community College. Delaware is also home to County Government, which helps stabilize the local economy and generate demand for housing government workers.

- **Heritage and Small-Town Living**. Delaware has an historic downtown that is attractive for those seeking a small-town lifestyle and walk-able amenities. Historic architecture, the Strand Theater, Hamburger Inn Diner, and other unique assets form part of the appeal. Overall, Downtown Delaware provides a "sense of place" that is very attractive in a world filled with strip malls. Downtown Delaware has been designated as a "Great Place in America" by the American Planning Association (APA).

- **Existing Business Base**. Large employers including Ohio Health, Kroger, Advance Auto, Jegs Automotive, Vertiv, PPG, International Paper and others help generate demand for housing in Delaware. Small businesses including entrepreneurs and downtown retailers are also important as drivers for the housing market. As noted earlier, there may be a slight mismatch between jobs & wages and the availability of housing that is affordable to local workers.

Market Area Definition

The residential market area from which Delaware draws demand includes a relatively broad area extending south into Columbus and north/west into neighboring counties. The market area can be disaggregated into four sub-markets as follows.

A) **Delaware City**. The housing market is driven by demand generated from demographic chance and housing choices within the city, from recent high school

graduates moving up into rental apartments or first-time buyers, and from move-downs among older residents due to the aging of the population.

B) **Remainder of Delaware County**. This area includes other parts of Delaware County. Households from Sunbury and areas of southern Delaware County are also part of the Delaware city housing market.

C) **Northwest Counties**. Counties located to the north and west of Delaware, including Morrow, Marion, and Union, are also part of the Delaware housing market. Some of the city's current and potential workers live in these counties and commute down into Delaware for jobs.

D) **Northwest Franklin County / Columbus**. Portions of the northwest part of Franklin County and the city of Columbus are also part of the primary market base for housing in Delaware. Brokers and sales figures confirm that communities like Westerville, Dublin, northwest Columbus, and Hilliard are sources of market base in Delaware.

In addition to these areas, there is also inflow from other parts of the Columbus metropolitan area as well as from people relocating to the area due to work or for other reasons. Ultimately, however, the primary market comprises areas of the northwest corridor or quadrant of the Columbus metro area.

Section 2. DEMAND ANALYSIS

This section provides findings from a demand analysis of residential development in Delaware. Demographic trends and forecasts were developed for each sub-market within the housing market area as a basis for determining overall demand within the next five to seven years. Employment forecasts by industry also helped inform the housing demand forecasts, since job growth will help drive demand, especially for rental housing. *Sample* demographic and economic indicators that were used in the analysis are discussed below, with a focus on the Delaware city sub-market.

Housing Tenure & Household Forecasts

Household demographic factors like age and mobility impact housing tenure and therefore, the demand for different types of housing product. Households were examined throughout the market area by age cohort and housing tenure and the relationship between these two factors is illustrated below for the Delaware city sub-market. Again, this information provides just a sample from one of the sub-markets that comprise the overall market area. So, household projections for the Delaware city sub-market were only a small portion of the basis for forecasting overall demand.

Table 1. HOUSING TENURE BY AGE COHORT, DELAWARE CITY, 2017

Age Cohort	Renters	Owners	TOTAL	Share Rent
15-24	464	83	547	85%
25-34	1,276	1,226	2,502	51%
35-44	999	2,358	3,357	30%
45-54	837	1,809	2,646	32%
55-64	776	1,564	2,340	33%
65-74	546	1,158	1,704	32%
75-84	245	607	852	29%
85+	124	179	303	41%
TOTAL	**5,267**	**8,984**	**14,251**	**37%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

In general, rental tenure declines with age of householder. However, the city of Delaware has an unusual "bump" in middle-age renters, with about one-third aged 55 to 64 in rental housing. Households were forecasted by age and tenure through 2024, with an overall increase of about 740 households over the next five years within the city of Delaware sub-market alone. The largest number of new market area households (6,690) will be created in northwest Columbus. The following table again provides just a sample household-by-age forecast from one small portion of the overall market area.

Table 2.	**HOUSEHOLD FORECASTS BY AGE & TENURE, DELAWARE CITY, 2019-2024**		
Age Cohort	**Renters**	**Owners**	**Total**
15-24	127	23	150
25-34	(200)	(192)	(392)
35-44	(50)	(118)	(168)
45-54	138	297	435
55-64	72	145	217
65-74	78	164	242
75-84	68	169	237
85+	9	12	21
TOTAL	**241**	**501**	**742**
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

The number of householders in the upper age brackets will increase, thanks to growth in both the baby boom and millennial generations. There will be a demographic "bust" among those reaching the ages of 25 to 44 by 2024, indicating not a "loss" of population but lower birth rates and the "aging out" of Millennials into lower middle age.

Household Income Forecasts

Household income is another important indicator of demand. Incomes have increased and are expected to continue increasing throughout the market area. The highest incomes are in the remaining portions of Delaware County (outside of the city of Delaware), with a median income of $112,430, expected to increase by 3.6% per year to $132,770 by 2024. Median income in the city of Delaware is at $72,720 and is expected to increase by 2.5% per year to $81,700. The following table provides a summary of household income trends and forecasts from 2000 through 2019 and forecasted to 2024.

Table 3. HOUSEHOLD INCOME TRENDS AND FORECASTS, DELAWARE HOUSING MARKET AREA, 2000-2024					
Area	**2000**	**2019**	**2024**	**2000-2019 Change/Yr**	**2019-2024 Change/Yr**
Delaware	$ 48,399	$ 72,718	$ 81,711	3.1%	2.5%
DE County	$ 70,033	$ 112,427	$ 132,770	3.8%	3.6%
NW Counties	$ 43,662	$ 60,468	$ 64,366	2.4%	1.3%
NW Columbus	$ 58,883	$ 82,697	$ 90,632	2.5%	1.9%
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.				

Incomes are lower in more rural areas to the northwest and are increasing at a slower pace than in other areas. Incomes in north-west Columbus are slightly higher but are also increasing at a slower pace.

Table 4. HOUSEHOLD FORECASTS BY INCOME DELAWARE CITY, 2019-2024			
Income Cohort	**2019**	**2022**	**Change**
<$15,000	1,335	1,257	(78)
$15-$25,000	1,075	1,002	(73)
$25-$35,000	1,145	1,056	(89)
$35-$50,000	2,183	2,007	(176)
$50-$75,000	2,661	2,668	7
$75-$100,000	1,962	2,100	138
$100-$125,000	1,525	1,610	85
$125-$150,000	1,171	1,287	116
$150-$200,000	1,178	1,456	278
$200,000+	1,100	1,634	534
TOTAL	**15,335**	**16,077**	**742**
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Within the city of Delaware, there will be household growth among those with incomes over $50,000, but a decrease in households with incomes under $50,000 due in part to the impacts of inflation.

Mobility Factors

Household mobility plays an important role in generating demand for housing, with higher mobility rates generated demand in larger numbers. As shown below, mobility rates are higher among younger householders and among renters. Within the city of Delaware, for example, renter mobility rates among those householders aged 15 to 24 exceed 77%, compared to 33% for those aged over 85. While mobility rates for 15 to 24-year-old renters exceeds 77%, they are only 49% for homeowners in the same age cohort.

Table 5. HOUSING MOBILITY BY TENURE AND HOUSEHOLDER AGE, DELAWARE MARKET AREA, 2010-2014

Age Cohort	Delaware City		Delaware County		NW Counties		NW Franklin/Columbus	
	Rental	Owner	Rental	Owner	Rental	Owner	Rental	Owner
15-24	77.4%	49.3%	70.0%	61.4%	69.9%	52.1%	69.2%	61.7%
25-34	63.3%	40.4%	57.3%	50.2%	57.2%	42.6%	56.6%	50.5%
35-44	66.5%	24.2%	64.4%	24.9%	56.6%	17.8%	64.1%	22.2%
45-54	54.4%	19.8%	52.7%	20.4%	46.3%	14.5%	52.4%	18.2%
55-64	60.5%	22.0%	58.5%	22.7%	51.4%	16.1%	58.3%	20.2%
65-74	60.6%	12.8%	63.3%	14.9%	35.3%	9.0%	49.3%	10.8%
75-84	49.6%	10.5%	51.8%	12.2%	28.9%	7.3%	40.3%	8.9%
85+	33.0%	7.0%	34.5%	8.1%	19.3%	4.9%	26.9%	5.9%

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Renter mobility rates tend to be higher in the city of Delaware than in other parts of the market area. Meanwhile, owner mobility rates tend to be somewhat lower.

Employment Forecasts

Employment growth will enhance demand for housing in Delaware. As has been shown recently, insufficient housing may exist to accommodate Delaware's workers, most of whom live outside of the city while Delaware's residents work elsewhere. Regardless of where people work, regional job growth will increase opportunities for housing development throughout the Columbus market.

The Ohio Department of Job and Family Services (JFS) projects the Columbus region to add about 31,750 jobs by 2024. The fastest growth will be in ambulatory health care services, where employment is expected to increase by 36.9% in just five years. Increasing use of the Internet for retail shopping will drive non-store (online) retail employment at companies like Amazon up by 30.1% by 2024. As evidence of this growth, Amazon has announced an immediate need to hire 30,000 workers nationwide to handle its online sales and distribution growth.

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Growth in management, scientific and technology services in the Columbus region is expected to top 25.0% over the next five years. Security trading and investment-related employment will increase by 20.0%, while office administrative service employment will be up by 15.2%. Other exceptional job growth will be experienced by construction (12.4%), employment services (12.2%), wood products manufacturing (11.1%), and specialized design services (10.5%), according to JFS.

Based on its historic role in the region and current trends, Delaware is expected to capture an aggregate of about 1.49% of this regional growth, or about 500 jobs in existing and new business growth. This rate of growth is relatively conservative, equivalent to about 30% to 40% of the growth experienced by Delaware between 2010 and 2015. Still, the number is realistic, given that economic growth nationally and regionally is slowing from the rapid pace experienced as the nation recovered from the recession during that 2010 to 2015 period.

Market Area Demand Summary

Housing demand will be generated by a combination of the net growth in households, changing demographics, mobility, employment growth, and replacement. Demand generated by several of these factors is summarized below.

Household Growth

The addition of new households will generate significant demand. Overall, the market area will see the addition of about 11,700 households in the next five years, of which about 6,700 will be in the northwest quadrant of Columbus and the rest spread throughout Delaware, Morrow, Marion and Union counties. The sub-market comprising the city of Delaware is projected to add about 740 households by 2024, but this projection does not account for demand generated from the broader market area or induced by Delaware's job growth, which is then captured through housing development in Delaware. Some of these new households will occupy existing vacant units (about 5.0% to 7.0% of the total in the city of Delaware, according to the Census), but most will generate demand for net new housing.

Plus Mobility-Driven Demand

Demand will also be generated by some of the 250,000 existing households who are moving around in the market. Mobility patterns will dictate that only a share (+/-14% per year, on average) of these 250,000 existing households will seek new housing, and those seeking housing are more likely (or in higher percentages) to be younger and renters.

Plus Job Growth-Generated Demand

The addition of nearly 32,000 jobs in the region, and possibly 500 within the city of Delaware, will also impact on demand for housing. The creation of new jobs will not only bring new householders into the market base, but also "pull" existing households towards housing within the commuter shed or to housing that is closer to those jobs. If housing that is affordable to those workers is not available, then they will have to locate further away from those jobs.

Plus Replacement-Generated Demand

There are about 16,000 housing units in the city of Delaware and 300,000 housing units in the market area. An average of about 1.0-2.0% of these existing units (or 3,000 to 6,000 units market-wide) would need to be replaced in five years, either because of demolition due to fire or other loss, conversion to other uses, damage, or condemnation. Within Delaware, this number is estimated to be closer to about 50 to 60 units (0.3-0.4%) over five years, based on recent trend information provided by the City.

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Section 3. DELAWARE HOUSING DEVELOPMENT POTENTIALS

Delaware's capture of market area housing demand was determined in the competitive market, considering existing projects in the city as well as competitive sites and projects elsewhere. The city's housing potentials were determined and translated into specific recommended development products that meet the need or demand within demographic cohorts. Finally, broad housing development concepts are recommended for key sub-areas in Delaware, based on the market findings.

Competitive Framework

The existing and planned development projects in Delaware provide a base for capturing market-area demand, while projects and neighborhoods in other parts of the market area and beyond compete with Delaware for home buyers and renters. Some of Delaware's neighborhoods and projects (described in the Baseline Assessment) are listed below, followed by a discussion of competitive housing.

City of Delaware

As noted in the Baseline Assessment, Delaware has existing neighborhoods with attractive housing. Among the city's neighborhoods are Northwest Delaware (historic district), East Side (1800's to post war (WWII) era, plus Old Colony Estates), University District (anchored by Ohio Wesleyan), the Marvin/Delaware Meadows area (offering smaller, mid-century housing), and both the West Side and "Southeastern District" designated for the purposes of this plan (offering a number of newer suburban projects).

Among the city's active single-family residential developments are Curtis Farms, Ravines of the Olentangy, Belmont Place, Glenross North, Communities at Glenross, Lantern Chase, Heatherton, Springer Woods, Winterbrook Place (planned), Stockdale Farms (planned), Terra Alta, Braumiller Woods, Old Colony Estates, and Willowbrook Farms. Active condominium and townhouse developments include the Lakes at Cheshire, Enclave at Adalee, and the Enclaves at Olentangy (planned). Multi-family apartment projects under development include The Reserve at Quail Pass, Flats on Houk, and Seattle House Apartments.

The city of Delaware is a hub for multi-family rental apartments in the \\area, with about 44 of the 86 competitive properties inventoried for this analysis. Most of the others are concentrated in the Polaris area, and they are clearly marketed based on their proximity to Polaris (since "Polaris" appears in the name

of nearly all apartments in that area). New and older apartment communities in Delaware include Village Gates, Flats on Houk, Hayes Colony, Burr Oak Commons (55+ years old residents), Stratford Park, Rolling Meadows, and others.

Delaware & NW Franklin Counties

Certainly, there are competitive areas of southern Delaware County and northwest Franklin County that continue to attract homebuyers and renters because of their proximity to jobs and amenities in Dublin, Columbus, and nearby areas. Residential developments around Powell and Lewis Center benefit from proximity to Polaris and a growing jobs base within the county itself. There were more than 200 actively-marketing residential developments inventoried for this analysis in southern/eastern Delaware County and northwest Franklin County, outside of Columbus. As noted above, the Polaris area and Columbus is also a hub for apartment communities. A sample of these communities includes the following:

Lewis Center. Courtyards at Clear Creek, Grand Pointe at North Orange, Courtyards at the Ravines, Evans Farm, Nelson Farms, Oak Creek at Polaris (apartments), Lake Club (apartments), Dooley's Orchard (apartments), Tapestry Park Polaris (apartments), The Mirada (apartments), Lakes at Olentangy (apartments)

Sunbury. Communities at Sunbury, Northlake Preserve, Northstar, Goldwell at Northstar

Powell. Heathers at Golf Village North, Courtyards on Hyatts, Liberty Trace, Hyatts Crossing, Clarkshaw Meadows, Clarkshaw Moors, Reserve at Scioto Glenn, Carpenters Mill, Powell Grand Communities (apartments)

Galena. Summerwood Lakes, Cheshire Woods, Ravines at Alum Creek, Corners at Johnnycake, Retreat at Warner, Brookview Manor, Reserve at Hidden Creek, Summerwood Lakes, Retreat at Dustin, Communities at Galena

Westerville. Preserve at Rocky Fork, Crossings at Rocky Fork, Reserve at Eagle Trace, Village at Central College, Bigham, Courtyards at Village Crossing, Preston Hollow, Albany Crossing, Ashton Village (apartments)

Dublin. Courtyards at Muirfield Ridge, Autumn Rose Woods, Riviera Regency, Courtyards at Riverside

Hilliard. Heritage Preserve, Tarlton Meadows, Anderson Meadows

Other Areas. Sanctuary at the Lakes (Africa), Glade at Highland Lakes (Africa), Courtyards at River Bluff (active adult 55+ near Delaware), Pines at

Berlin Station (near Delaware), Glenmead (near Delaware), Creekside Preserve (Johnstown), Meadows of Mill Creek (Ostrander), Liberty Village (Shawnee Hills)

Northwest Counties

There is also competitive development in Morrow, Marion, and Union counties, and surrounding areas to the north and west of Delaware. Much of the competitive product is concentrated in Marysville, not far from the Honda plant, or in Plain City. Among the competitive residential projects in those areas are Ewing Meadows (2-story Single Family / Villas & Ranches) (Marysville), Mill Valley North (Marysville), Adena Pointe (Marysville), Jerome Village & Courtyards at Jerome Village (Plain City), Darby Fields (Plain City), Weaver Ridge (Marysville), Keystone Crossing (Marysville), Orchid Hill (Plain City), Hickory Run (Marysville), Reserve at New California (Plain City), and others.

Northwestern Columbus & Other Areas

There are also a number of competitive developments in various phases of construction in the northwest portions of Columbus. Among these are Founders Park at Harrison West, Minerva Park, Homes at Grandview Yard, Homes on Pullman Way (Grandview), Jeffrey Park, Truberry on Second, Southern Tier, The Chelsea, The Pointe at Polaris (apartments), Residences at North Park Place (apartments), Ravines at Westar (apartments), 801 Polaris (apartments), NorthPark Place in Polaris (apartments), Polaris Place (apartments), and others. Various eastern suburban communities are competitive, with various projects under development in New Albany, Johnstown, and other areas.

Delaware Capture & Potentials

Delaware housing development potential was determined in the competitive market and forecasted out five to seven years as an input to planning. Potentials were determined for both rental and for-sale housing, as disaggregated below.

Rental Housing Potentials

Delaware could capture demand for about 970 to 1,700 rental housing units over the next five to seven years (or about 190 to 300 per year). A significant portion of that demand would be generated for affordable and attainable housing units, for households with incomes below Delaware's median income. Demand for market-rate units would range up to about 600 rental units over the next five to seven years, yielding potential for about 120 market rate units per year. Construction trends indicate that the city had been permitting about 100 multi-family housing units per year up to 2019, so there has been a gap between demand and supply of market-rate rental housing in the city.

There would be demand for about 360 to 600 attainable housing units for those households earning 80% to 100% of the city's estimated median household income of about $72,700 in 2019. Those attainable housing units would typically serve the needs of recent graduates entering the work force or employees at Delaware's manufacturing and other industrial facilities, many of whom cannot otherwise find affordable housing in the city. Thus, these units represent an opportunity to meet the need of under-served market for attainable housing in the city.

Table 6. RENTAL HOUSING POTENTIALS, DELAWARE, 2019-2024

Rent Range	Area Capture Moderate	Area Capture High	Market Rate
$ 300	192	239	-
$ 500	97	139	-
$ 600	87	140	
$ 700	171	306	
$ 800	152	293	223
$ 1,100	97	198	147
$ 1,200	51	124	88
$ 1,500	34	111	73
Sub-Total	**881**	**1,549**	**530**
Attainable	*355*	*584*	
Job Induced	**87**	**175**	**60**
TOTAL	**969**	**1,724**	**590**

Sources: U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.

About 90 to 175 of the forecasted demand would be generated by projected job growth and Delaware's propensity to capture that "job-induced" growth over the next five to seven years. The break points above represent rents at 30%, 80% and 100% of estimated median household income in the city.

For-Sale Housing Potentials

Delaware could capture demand for about 680 to 850 for-sale housing units over the next five to seven years, or 130 to 170 units per year. The City has been permitting about 170 units per year. The total includes about 270 to

440 attainable and affordable housing units that could meet the demand generated by existing Delaware workers and young resident families, many of whom are underserved in the existing for-sale housing market.

Table 7. FOR-SALE HOUSING POTENTIALS, DELAWARE, 2019-2024			
	Area Capture		**Market**
Price Point	**Moderate**	**High**	**Rate**
$ 106,250	183	193	-
$ 156,250	88	95	-
$ 218,750	99	110	110
$ 247,500	83	95	95
$ 288,750	17	20	20
$ 367,500	36	43	43
Sub-Total	**506**	**556**	**268**
Job-Induced	**179**	**298**	**144**
TOTAL	**685**	**854**	**411**
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Projected job capture would generate demand for about 180 to 300 for-sale housing units, including 140 to 150 market-rate units. Break points shown above represent housing prices that are affordable at 30%, 80% and 100% of the city's estimated 2019 median household income. *Altogether, the market analysis suggests that Delaware could generate demand for about **1,650 to 2,580** rental and for-sale housing units over the next five to seven years*. The broader timeframe allows for the possibility of an economic slowdown, which would delay and slow housing market growth for an average of two years.

Section 4. DEVELOPMENT RECOMMENDATIONS

Based on the findings of the market analysis, coupled with stakeholder input from within the real estate and lending industries, several recommendations are made with respect to the types of housing product needed to meet the demand forecasted in this report. Also recommended are development concepts or strategies for sub-areas within the city, with a particular focus on Area 1 (South Eastern District) and Area 2 (South Western District). These recommendations are summarized below.

Targeted Housing Products

Recommended housing product development would be targeted to meet three specific objectives. First, product is recommended to help create more available attainable housing and meet the needs of Delaware's own employment base. Second, there is product recommended to meet the needs of an aging Baby Boom generation and "empty nesters." Finally, there are recommended products to help diversify the overall single-family product base in the city as part of marketing the city for executives, workers, and families.

Attainable Housing

Meeting the needs of existing and potential new workers at Delaware's various manufacturing and other business facilities is a priority as it helps to close a gap in the market and ameliorate the cross-commutation patterns that characterize Delaware's labor market. "Attainable" is defined for the purposes of this analysis as pricing affordable to those workers with household incomes at 60-80% of Delaware's estimated 2019 median of $72,700 per year. Key products needed to address this need include more rental apartments, preferably those built in mixed-use or walk-able formats that are well-integrated with the community. Another target product would be "higher-density" single-family development, such as in the form of "cottage communities," townhouses, vertical mixed-use, and 0-lot line developments.

Cottage-style communities, which include smaller units with smaller yards but high amenity value through shared open space, recreation amenities, and walk-able development patterns, are becoming a popular product not only as an affordable alternative but also for empty nesters and others looking to lower maintenance costs. Finally, there are opportunities for rehabilitation of existing housing in older neighborhoods within the city. These rehab opportunities could be leveraged through incentives and infrastructure investments.

Empty Nester Housing

As noted above, empty nesters are looking increasingly at "maintenance-free" housing products in walk-able neighborhoods. The Baby Boom generation has driven housing demand and formats for nearly 60 years, and this trend continues today as the largest single demographic cohort in the housing market starts to downsize and express a lifestyle preference for walk-able environments. Again, the products most suited to this lifestyle include condominiums, 0-lot line developments, and "cottage homes" or small-lot single-family units in HOAs or similar shared maintenance arrangements. As this population cohort ages, then efforts will need to ensure that housing remains accessible, since the vast majority of seniors prefer to "age in place" rather than relocate to independent or assisted living developments.

More Diverse Single-Family Product

Delaware has benefited from development of relatively affordable, single-family product, especially on the south-east side. Unfortunately, some of these new communities lack a sense of place and high-quality product. There is a need to avoid "cookie-cutter" housing development, and to encourage more walk-able developments that incorporate some mix of uses. Having a small convenience node can help to encourage walking within a neighborhood. Where possible, new communities should be integrated seamlessly with existing neighborhoods but not in a way where drivers are "lost" within a never-ending swirl of cul-de-sac developments.

Delaware has the opportunity to attract master-planned development in the form of a traditional neighborhood (TND) or other community that offers a mix of single- and multi-family housing along with commercial uses in a walk-able environment. There is increasing demand for this product in Delaware.

Sub-Area Concepts

There are several special areas that have been defined through the Delaware Together planning process. Two of these areas offer significant potential for new housing development within the timeframe of the implementation of this plan: Special Area 1 (South Eastern District, as indicated by an oval shape on the map) and Special Area 2 (South Western District, indicated by the square shape on the map).



Input from the market analysis, real estate professionals, and the Southwest Industrial Area assessment helped to inform recommendations for

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development and redevelopment concepts for these sub-areas, as summarized below.

Area 1 (South Eastern District)

The south eastern portion of Delaware includes a number of newer single-family residential developments, many of which are melded together in a way that it is sometimes difficult to tell where one development ends and another begins. The housing stock, pricing, and community layout are fairly uniform, with limited variation and few amenities to anchor neighborhoods and establish neighborhood identity.

Here there is the opportunity to diversify the housing stock as noted previously in this section, and to create more walk-able neighborhoods through the addition of small amenity centers or commercial nodes that incorporate convenience uses as well as amenities like parks or recreation facilities.

The south eastern district is well-suited as the location for a traditional neighborhood development (TND), because of its proximity to downtown Delaware as well as its accessibility to employment and shopping nodes to the south around Polaris and Dublin. A TND in this location would need to be amenity-rich and offer a mix of housing products (single-family detached, apartments, condominiums, and cottage homes), along with a retail/commercial center. Ultimately, a TND provide Delaware one of its best opportunities for attracting housing to meet the needs of executives and professionals who commute into Columbus/Polaris/Dublin or who might establish offices in a newly branded Sawmill District corridor.

Area 2 (South Western District)

The city's south western district could provide a competitive location for housing if an "amenity node" were to be established as part of the Sawmill District Gateway recommended as part of the Southwest Industrial Assessment. This amenity node might include a mix of attainable housing (apartments, mixed-use, townhouses, cottage home community) along with retail, restaurants, services, and recreation amenities.

This amenity node would complement the "corporate" character and intent of marketing the Sawmill Corridor for industrial and office business uses. Closer to U.S. Route 23, the area would evolve a more "residential" character, consistent with the existing uses in that area and the marketing of a traditional neighborhood development in the south-east.

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MEMORANDUM

TO:	Sarah Kelly, AICP, Senior Project Manager Planning NEXT
FROM:	TischlerBise, Inc.
DATE:	May 18, 2020
RE:	City of Delaware Fiscal Efficiency Evaluation

Background

The City of Delaware Comprehensive Plan presents strategies to manage Delaware's land use and growth decisions in a fiscally sustainable manner. The Comprehensive Plan includes strategies to maximize land uses, preserve the quality of place, and ensure development pays its fair share of improvements to provide necessary public services like transportation infrastructure, utilities, parks, recreational facilities, and public safety.

Factors Influencing the Fiscal Sustainability of Land Uses[1]

Numerous factors influence the fiscal results for different land uses. These factors include, but are not limited to:

- Local revenue structure,
- Services provided,
- Local levels of service,
- Capacity of existing infrastructure, and
- Demographic and market characteristics of new growth.

Local Revenue Structure

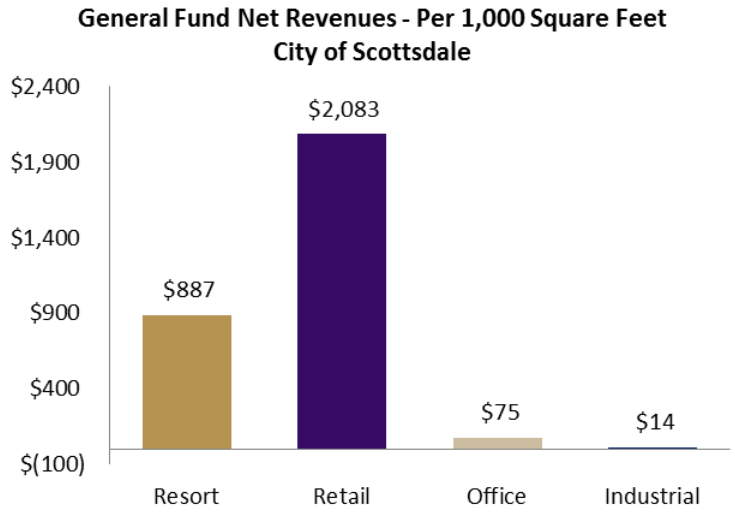
A key determinant in calculating net fiscal results from new development is the local revenue structure, which affects fiscal findings through both its composition and revenue distribution/collection formulas. Every community has at least one major revenue source, and in some cases, several on which it is reliant. Examples include property tax, local sales tax, and state shared revenues. An important component of

[1] L. Carson Bise, AICP. *Fiscal Impact Analysis: Methodologies for Planners*, (American Planning Association, 2010)

revenue structure is the distribution/collection formulas for various sources. With the exception of property tax, the distribution/collection formulas for common revenue sources can vary greatly from state to state. For example, in states where sales tax is collected, some allow communities to assess a local option sales tax, which is usually collected on a situs-basis (point of sale). Other states collect sales tax at the state level and distribute the revenue to communities using a population-based formula. A similar situation exists with income tax, where some states allow a local income, or "piggyback" tax on top of the state income tax. In certain states, such as Maryland, this tax is collected by place of residence. In others, such as Ohio, it is collected by place of employment.

Examples are shown below from two cost of land use studies for prototype nonresidential land uses in each community. The figures show results for nonresidential development per 1,000 square feet of floor area. Data points above the $0 line represent net surpluses; data points below the $0 line represent net deficits. The first example shows results for the City of Scottsdale, Arizona, where the main source of revenue is a "point of sale" sales tax. Note the positive results for retail development.

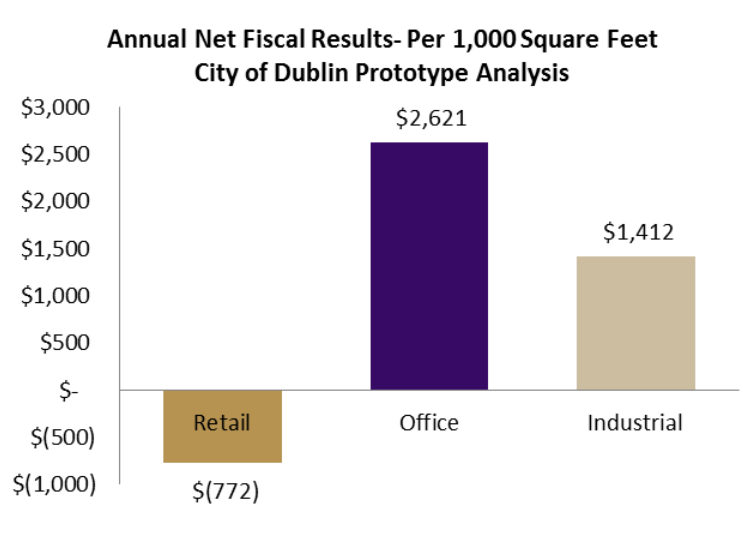
Figure 1: Example of Fiscal Impact Results: Locality with "Point of Sale" Sales Tax



Source: TischlerBise

Compare the results from Figure 1 to the City of Dublin, Ohio, shown in Figure 2. Cities in Ohio have a local income tax, which is based on place of work rather than place of residence. Note here the results for retail development showing that retail land uses cost more to the City than they generate in direct revenue.

Figure 2: Example of Fiscal Impact Results: Locality with Local Income Tax by Place of Employment



Source: TischlerBise

Services Provided

Another important factor in the fiscal equation is the services provided by the jurisdiction. Jurisdictions provide different services and the fiscal impact analysis will reflect this—and stakeholders and the audience for the study will need to understand this. For example, in many states, School Districts are separate entities with their own tax rates (e.g., Florida, Ohio). In other states, schools get their local funds from County General Fund taxes (e.g., Virginia). Fiscal analyses will obviously reflect the services provided and funding streams, and audiences need to be aware of this to prevent both unintentional and deliberate confusion.

Levels of Service

Another factor in fiscal impact analysis is an understanding of the levels of service currently being provided in a community. Existing levels of service are defined as the facility or service standard currently being funded through the budget. Examples of level of service standards are pupil teacher ratios (i.e., 1 teacher per 24 students), parkland per capita, etc. This is an important factor since levels of service generally vary from community to community.

Capacity of Existing Infrastructure

The capacity of existing infrastructure in a community also has a bearing on the fiscal sustainability of new development. For example, a community may have the capacity to absorb a large number of additional vehicle trips on its existing road network or may be significantly under capacity with regards to high school

enrollment. In either of these situations, using a case study-marginal cost approach that accounts for existing facilities and levels of usage to assess fiscal impacts, a community with excess capacity could absorb substantially higher growth over time without making additional infrastructure investments than a community without these capacities. This excess capacity results in lower capital costs over time. This is an important factor in the fiscal equation, since the largest cost associated with capital facilities are the annual operating costs, which typically account for approximately 80 percent of a community's budget.

Demographic and Market Characteristics of New Growth

Next to a community's revenue structure, no other factor has as great an impact on the net fiscal results as the demographic and market characteristics of different land uses. Examples of demographic and market variables for residential development include average household sizes, pupil generation rates, market value of housing units, trip generation rates, density per acre, and average household income. Important demographic and market characteristics for nonresidential development include square feet per employee, trip generation rates, market values per square foot, sales per square foot (retail), and floor area ratio.

Existing Financial Condition

The balance of revenue to expenditures is a complex process, the details of which are best reviewed in either the City's annual budget or Comprehensive Annual Financial Report (CAFR). The budget process for the City is generally a balanced process from year to year; however; some expenditures and investments in infrastructure can occur over several years. The framework established to distribute these revenues towards the various costs to serve development consists of several Funds. These Funds include: the General Fund; Special Revenue Funds; Capital Projects Funds; Debt Service Funds; and Enterprise Funds.

The City has several funds/revenue sources in place to contribute to and address the cost of development. Below is a description of some of the sources of revenue the City has established to fund infrastructure.

Impact Fees: Impact fees are one-time payments used to construct system improvements needed to accommodate development. Impact fees must be proportionate and reasonably related to the capital facility service demands of new development. The City collects impact fees for parks, police and fire services, and municipal facilities.

Enterprise Funds: These are funds where user fees are set to recover the cost of providing services and facilities such as water distribution and wastewater collection to the City's utility customer base. These revenues are used to cover operating and some capital items such as debt service. The City augments these revenues with impact fees, designed to recoup new growth's share of needed infrastructure.

Capital Improvement Funds: Other funding for improvements includes pay-as-you-go funding out of current revenues for lower cost improvements. Grants are used to bridge funding gaps and leverage additional funds. Bonds also provide an inexpensive way to finance largescale projects. The City transfers

bond sale proceeds to Debt Service Funds that account for principal and interest payments on major, debt-financed infrastructure projects such as roadway construction.

Tax Increment Financing Funds: TIF funds account for the tax increment financing real estate tax payments received related to new development. The TIF funds are to be used to pay for the cost of constructing the infrastructure required to serve the new development and to reimburse the developer for onsite improvements. TIF proceeds are remitted to the developer as received.

Revenues

Like all Ohio cities, the City of Delaware's main source of discretionary funding is its local income tax. By way of example, income tax represents almost 64% ($16.5 million) of total General Fund revenue ($25.8 million) in FY2020 (shown in Figure 3 below). The discretionary portion of the income tax is accounted for in the General Fund. It is used to pay the majority of administrative salaries, as well as for many capital projects in the City. Other portions are used to fund the City's fire department operations and recreation improvements, which are accounted for in Special Revenue Funds.

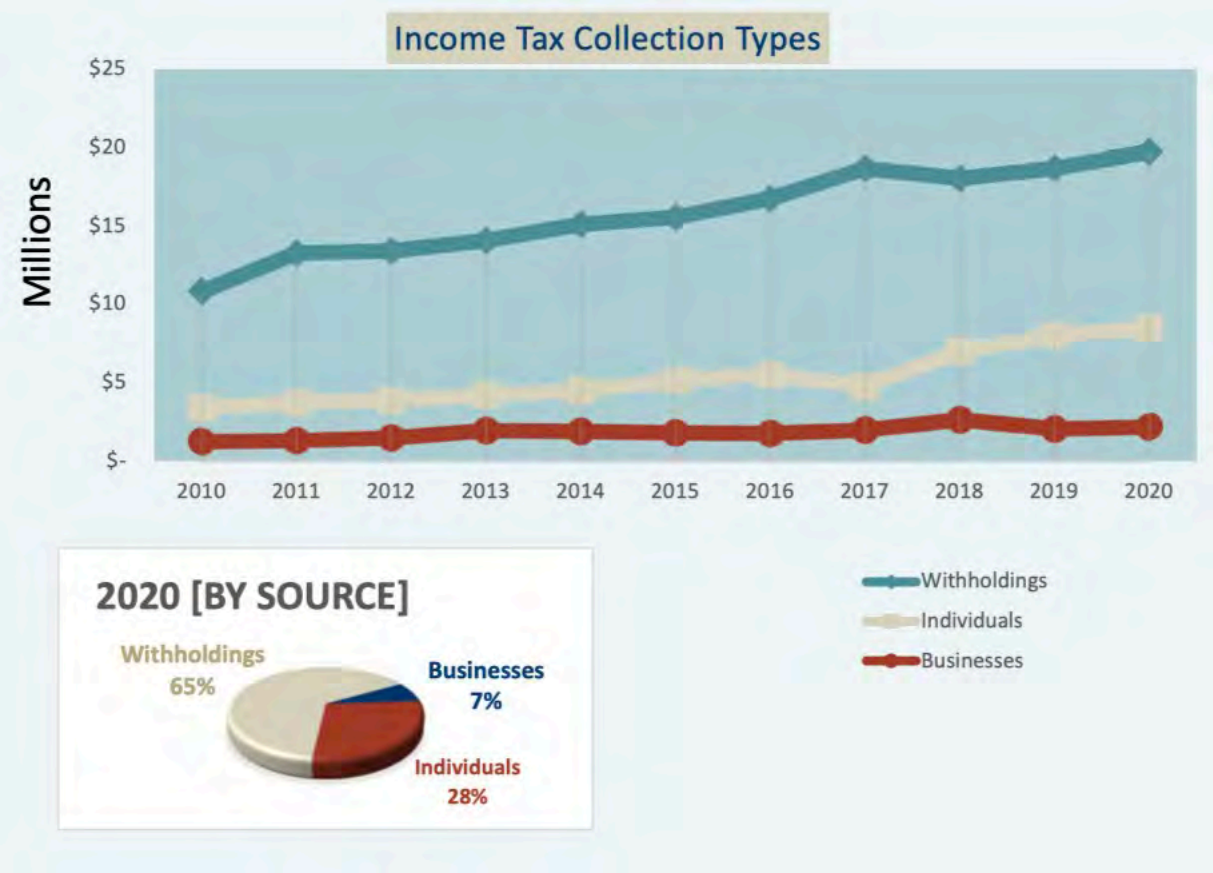
Figure 3: City of Delaware FY2020 General Fund Revenue

Revenue Type	FY2020 Amount	Percent
Property Tax	$1,720,000	7%
City Income Tax 1%	$16,510,750	64%
Inheritance Tax	$0	0%
Local Government Fund	$700,000	3%
Grant Reimbursements	$141,726	1%
Fines and Forfeitures	$100,000	0%
Court Diversion Fees	$40,000	0%
Engineering Fees	$900,000	3%
Prosecutor Contracts	$260,000	1%
Parking Meters	$38,000	0%
Cable Franchise Fee	$415,000	2%
Liquor Permits	$50,000	0%
License and Permits	$1,335,000	5%
Investment Income	$950,000	4%
Miscellaneous	$230,000	1%
Reimbursements	$150,000	1%
Transfer Grant Administration	$30,000	0%
Transfers	$2,269,603	9%
TOTAL	$25,840,079	100%

Source: City of Delaware FY2020 Budget

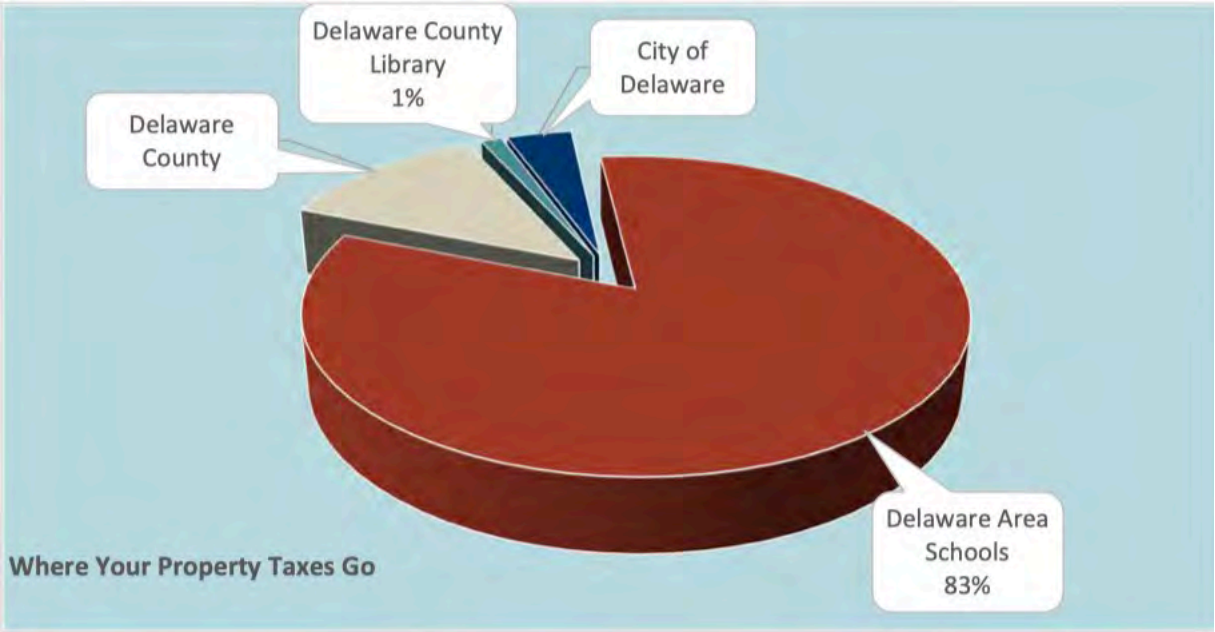
The City's current income tax rate is 1.85% of income based on withholdings, individual filings, and business profits. As shown in Figure 4, approximately 65% of income tax comes from withholdings in FY2020, followed by individuals (28%) and businesses (7%).

Figure 4: City of Delaware Income Tax Collections



Delaware also assesses a property tax. However, the vast majority of property taxes (96%) paid by City residents is to the County, County Library District and School District. The City of Delaware only receives only about 4% of property tax. The City's property tax is allocated to the General Fund, as well as a dedicated amount to police and fire pensions.

Figure 5: City of Delaware Property Tax Distribution



The City also receives revenue from engineering fees, water capacity fees, sewer capacity fees, building permits, and growth management fees (park impact, police/fire, transportation municipal). While these fees currently keep the City budget balanced, they need to be continually assessed as expenses change over time due to growth and other factors.

Expenditures

The City provides a range of services to residents and workers including police and fire safety services, public works facilities development and maintenance, water treatment and distributions, storm water and sanitary sewer maintenance, solid waste collection, parks and recreation maintenance, and community development services. It should be noted that the City is not responsible for funding school costs.

General Fund expenditures by department are presented in the figure below.

Figure 6. City of Delaware FY2020 General Fund Expenditures

Expenditure Type	FY2020 Amount	Percent
City Council	$186,520	1%
City Manager	$927,225	4%
Administrative Services	$424,253	2%
Economic Development	$503,655	2%
Legal Affairs/Prosecutor	$880,636	3%
Finance	$1,691,137	7%
Income Tax Refunds	$650,000	3%
General Administration	$4,485,873	17%
CIP Transfer	$1,850,000	7%
Reserve Transfers	$75,000	0%
Risk Management	$349,100	1%
Police	$9,677,542	37%
Planning	$1,514,433	6%
Engineering	$2,034,549	8%
Building Maintenance	$571,767	2%
TOTAL	$25,821,690	100%

Source: City of Delaware FY2020 Budget

An additional $26,752,643 is budgeted for capital investments necessary to accommodate growth, and to provide a consistent level of service to residential and nonresidential development. These expenditures are accounted for in the Capital Improvement Funds and reflect programming for investments in general government, public safety, streets, water, parks and recreation, and airport infrastructure and equipment.

Funding for improvements includes pay-as-you-go funding out of current revenues for lower cost improvements. Grants will be used to bridge funding gaps and leverage additional funds. Bonds provide an inexpensive way to finance large-scale projects. Lastly, impact fees are one mechanism used by the City to ensure growth pays for its share of necessary public services. Impact fees, paid by developers, serve to ensure continued levels of service, by funding new infrastructure and facilities necessitate by growth.

Strategies to Improve and Maintain Fiscal Sustainability

The City of Delaware currently enjoys a strong fiscal position as a result of local and regional economic growth and the implementation of thoughtful fiscal and land use policies. The Comprehensive Plan has identified strategies that maximize the benefits of projected growth by balancing fiscal priorities with quality of life improvements. The planning process reveals a tolerance for densification through infill development as well as a desire to see the targeted redevelopment of areas that are considered blighted or otherwise underutilized from a land use perspective.

Infill

The Comprehensive Plan identifies a community desire to encourage infill development as a means to slow outward growth, to create vibrancy in commercial districts, and to stabilize districts. Typically, infill development takes advantage of already existing public infrastructure like streets, water, and utilities with the capacity to absorb the growth in a vacant or underutilized property. By encouraging investments to be made within developed areas the property values of the surrounding neighborhood may benefit. Increased property values is a net gain for Delaware; however, because property tax is not a large revenue stream for the City, the purpose of infill is more to encourage vibrancy and create demand for additional commercial/office/service sector land uses that generate employment and thus income tax revenue.

Redevelopment

Redevelopment of areas that are not currently utilized for residential, industrial, or agricultural purposes provides the City with an opportunity to expand its tax base and accommodate growth through the provision of additional housing or services. The Comprehensive Planning process has identified over 1,500 acres for redevelopment. Compared to infill, redevelopment can require more significant upfront capital investment, depending on the extent to which the area was already served by public infrastructure. Tools such as Tax Increment Financing ("TIF") and Community Redevelopment Areas ("CRAs") can be utilized to fund some public infrastructure in redevelopment areas (although it is understood that parcel TIFs are currently in favor with the State). The City of Delaware has experience using both TIFs and CRAs to support the redevelopment of blighted or underutilized areas.

Development Types

Chapter 4 of the Comprehensive Plan identifies development types that currently exist in the City of Delaware; these development types serve as the building blocks for the Character and Land Use Plan (Chapter 5) and recommendations (Chapter 7). Traditional Town/Urban development types tend to reflect higher density, more pedestrian-friendly land uses than Suburban development types, which reflect low-density, auto-oriented land uses.

Given the revenue structure and capital demands of land uses in the City, the best means to maintain fiscal sustainability is to diversify and intensify the land uses with an emphasis on nonresidential uses. Because of the City relies heavily on income tax from workers who are employed within the municipality

it is fiscally beneficial to prioritize mixed-use and nonresidential land uses and to target high-income industries, in particular.

However, as shown in the figure below, no single land use provides strictly positive fiscal result. The City collects property tax and more importantly income tax from nonresidential establishments, but per the Institute of Transportation Engineers ("ITE") nonresidential development tends to generate more vehicle trips, stressing the street infrastructure, and typically has higher rates of public safety calls compared to residential uses.

Suburban residential development types (low density) typically generate higher property tax revenues, but often require extension and maintenance of streets, water, and utilities out to greater distances than Traditional Town / Urban (higher density clustered development). According to the Institute of Transportation Engineers ("ITE") sprawling development generates more vehicle trips per housing unit than a unit in a multi-unit structure, and on average single residential units in Delaware have more persons per household than units in multi-unit structures, which generates more vehicle trips, and demands for public safety, and parkland capital investments.

Figure 7. Hierarchy of Higher Density Development Prototypes and Fiscal Benefits

TRADITIONAL TOWN / URBAN					
	Tax Revenue		Demand for Services	Demand for Infrastructure	Fiscal Benefit
Development Type	Property	Income			
Residential (per Unit)					
Small Block Neighborhood - Traditional	Medium	-	Medium	Medium	Neutral
Small Block Neighborhood - Neotraditional	Medium	-	Medium	Medium	Neutral
Large Block Neighborhood - Traditional	Medium	-	Medium	Medium	Neutral
Nonresidential/Mixed Use					
Traditional Activity District	Low	Low	Low	Low	Neutral/Positive

Figure 8. Hierarchy of Lower Density Development Prototypes and Fiscal Benefits

SUBURBAN					
	Tax Revenue		Demand for	Demand for	Fiscal Benefit
Development Type	Property	Income	Services	Infrastructure	
Residential (per Unit)					
Single Family - Early Suburban Neighborhoc	High	-	High	Medium	Neutral/Negative
Single Family - Late Suburban Neighborhooc	High	-	High	Medium	Neutral/Negative
Multifamily Complex	Low	-	Medium	Low	Neutral
Mixed Residential	Varies	-	Medium	Medium	Varies
Nonresidential / Mixed Use					
Neighborhood Scale Activity Center	Medium	Medium	Low	Low	Positive
Community Scale Activity Center	Medium	Low	Low	High	Neutral
Regional Scale Activity Center	Medium	Low	Low	High	Neutral
Commercial Corridor	Varies	Varies	Low	Low	Varies
Industrial					
Industrial Campus	Low	Medium/High	Low	Low	Positive
Industrial Corridor	Low	Medium	Low	Low	Positive

Industrial employment is assumed to pay higher wages and salaries than retail per nationwide averages and given regional trends for the industrial employment sector discussed in Chapter 3. Office employment tends to generate higher income than retail jobs—of the nonresidential development prototypes, only Suburban Neighborhood Scale Activity Center includes office land uses, which contributes to its positive net fiscal benefit.

***Note Regarding Annexation*:** The annexation of developable land has also been identified as a potentially fiscally beneficial growth management strategy, although the cost of expanding infrastructure and services must be carefully considered in the development and implementation of any annexation strategy. Moreover, the Comprehensive Plan process does not recommend annexing any property within the next ten years. The fiscal sustainability of annexation will depend on the development plan for the annexation area.

Real Estate Market Assessment

City of Delaware, Ohio



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January 19, 2021

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I. Executive Summary

DiSalvo Development Advisors, LLC (DDA) has analyzed the residential and commercial market conditions in the City of Delaware to identify market-supported development opportunities in several targeted areas identified by the city.

The City of Delaware's employment profile no longer matches that of their residents. The dominant blue-collar resident population of decades ago has shifted to two-thirds of the population now in white collar occupations, matching the employment profile of Franklin County residents. The shift coincided with the commercial development of the Polaris area in southern Delaware County. As a result, the labor pool for the city's existing employment sectors is shallow and growth has been reliant upon attracting out-of-town workers. A thoughtful development strategy with unique land use can set the foundation to attract more business types who are more representative of Delaware's current residents.

It is DDA's opinion that a market exists at varying levels for all types of commercial and residential (re)development throughout the city. A summary of key market findings by development type and market-supported development opportunities by area follows:

Rental Housing

Inventory: DDA surveyed 24 apartment properties (50 or more units) totaling 3,171 units. A proposed 178-unit apartment development in Coughlin Crossing, named Coughlin's Crossing Apartments, was recently approved by the City of Delaware.

Occupancy: 97% occupancy level among market-rate properties, including two properties in initial lease up. No vacancies were found among the six low-income and subsidized housing developments surveyed. Waiting lists range from 14 (Georgetown Senior) up to 108 households (Arthur Place).



Redwood

Rent Levels: Upper-quartile rents range from $935 to $1,175 for one-bedroom units and $1,195 to $1,715 for two-bedroom units, yielding rents per square foot of $1.32 to $1.39 for a one-bedroom unit and $1.09 to $1.23 for a two-bedroom unit (rents at age-restricted Burr Oak not included).

Demand: A five-year projected growth of 1,289 renters from 2020 to 2025. There will be an estimated 3,727 renter households with incomes above $40,000 by 2025. DDA expects a site-specific market-rate property to support 186 to 260 units. Based on the five-year market-rate potential of 590 units, the market can absorb up to three market-rate projects over the next five years (source: *Residential Market Analysis*, Randall Gross).

There are an estimated 2,743 renter households with incomes below $40,000, representing demand for additional affordable housing in the market. The Residential Market Analysis estimates demand for 360 to 600 units within this income group. The Low-Income Tax Credit program represents the most likely vehicle to develop additional affordable housing.

Priority Locations: Downtown Area/Riverfront; Southeast; Southwest (see page 7 for map)

The downtown area has a healthy-to-vibrant mix of commercial uses and offers a tremendous opportunity to attract renters and achieve rent premiums (refer to page 34 for more detail). The riverfront area is adjacent to downtown and considered an easy and convenient walk.

For-Sale Housing

Single-Family Sales Activity: The City of Delaware had nearly 1,000 home sales from August 2019 through July 2020 (source: Delaware County Auditor).

Home Sale Price	Existing Home Resales	New Home Sales	Total Sales	Share of Sales
Less than $100,000	33	-	33	3.4%
$100,000 - $149,999	63	-	63	6.5%
$150,000 - $199,999	89	-	89	9.3%
$200,000 - $249,999	188	25	213	22.1%
$250,000 - $299,999	133	82	215	22.3%
$300,000 - $349,999	62	80	142	14.8%
$350,000 - $399,999	36	70	106	11.0%
$400,000 and Higher	35	66	101	10.5%
Total	639	323	962	100.0%
Average	$242,562	$316,219		

New Subdivision Sales Rates: The Communities of Glenross average 5.6 homes sold per month. The next highest sales rates are three homes per month among two of the lowest priced subdivisions in the city: Enclave at Adalee and Lantern Chase.

Condominium Activity: Condominium development has been limited in the past decade with construction in only two developments: Lakes at Cheshire and Landings at Glenross. Both developments are located in Delaware's southeast area and began selling in 2006/2007, during the Great Recession, with sales and ongoing construction nearly nonexistent until 2012-2013.

Since 2017, sales levels at Lakes at Cheshire have reached at least 15 each year.

Condominium Sale Prices: The peak sales at Lakes at Cheshire were 19 in 2019. The 15 new sales in 2020 ranged in price from $245,000 to $310,000. One newly constructed home is currently listed as available for $309,987, including a $140 monthly association fee.



Lakes at Cheshire

Demand: The City of Delaware is projected to have an increase of 2,454 homeowners from 2020 to 2025. Owner households of one- to two-persons represent slightly more than half the homeowners in the City of Delaware, bolstered by one-fourth homeownership by householders age 65 and older. The high share of older adult homeowners and limited condominium offerings indicates an untapped condominium market. It is DDA's opinion, development of attached ranch or villas would receive strong market response throughout the city.

Priority Locations: Southeast and Southwest

The Southeast area of the City of Delaware will continue to lead for-sale housing development bolstered by its location in the popular Olentangy School District.

Retail/Restaurants



Inventory: DDA identified nine multi-tenant shopping centers in the City of Delaware totaling 1,131,018 square feet. Forty-five percent of the shopping center space had been built since 2000. DDA identified 225 retail and restaurant businesses within the City of Delaware operating within an estimated 1.3 million square feet of retail space (shopping center and stand-alone retail).

The downtown area has 36 (37.1%) of the city's 97 restaurant and drinking places.

Occupancy Rate: The estimated shopping center retail vacancy rate in the City of Delaware is currently at 11.2%. This is considered a moderate vacancy rate, comparable to the Columbus retail market.

Lease Rates: Prevailing lease rates in the market range from $8 per square foot (triple net) for large retail spaces and $16 to $20 for typical retail stores of 1,000 to 2,000 square feet, depending on the age and quality of the space.

Demand: The City of Delaware residents will have an estimated retail trade spending potential of $700 million by 2025, approximately $100 million above current estimated retail spending, of which $55 million represents retail trade excluding automobile and online sales.

The trade area has a population 10,000 above the City of Delaware and in 2017 has current sales potential of $650 million, of which approximately $425 million are non-automobile sales. The trade area consumer spending potential is 80% of local estimated sales. The non-automobile spending potential in the trade area is projected to increase to $477 million by 2025.

The potential unmet demand for the $90 million retail spending could generate approximately an additional 210,000 square feet of occupied retail space in the City of Delaware.

Estimated restaurant sales per square foot in 2017 were $319 per square foot. This is considered a healthy overall sales per square foot amount. DDA projects restaurant spending power within the local trade area will reach $87 million by 2025. Assuming 80% of the restaurant spending occurs in the trade area, at an average of $325 per square foot, in the next five years there is potential to support another 50,000 square feet of food and beverage space in the City of Delaware.

Priority Locations: Proximate grocery-anchored shopping centers; Destination restaurant, brew pub, or brewery with tap room in Southwest can expedite a mixed-use development in the southwest area of the City of Delaware.

We recommend limited placement of additional restaurants in the downtown as there is already a vibrant mix of restaurants in the downtown area. A disproportionately high share of restaurants can adversely impact other retailers as lease rates increase and there is a lack of new space for other resident and visitor-oriented uses.

Offices

Inventory: DDA identified approximately 450,000 square feet of office space in the City of Delaware within buildings with 5,000 or more square feet. Medical office buildings represent 40% of the office market, many of which are owner-occupied buildings. Overall, the available office spaces in the city are small and, except for a flex office space, we were unable to identify any modern contiguous office space of 5,000 or more square feet.

Occupancy Rate: The overall occupancy rate of leasable office space is estimated at 80%, comparable to the regional office market.

Lease Rates: The city's largest general occupancy office development is a 31,346-square-foot multi-tenant building located at 3769 Columbus Pike. The building was constructed in 2005 and is 80% occupied with vacant space available to lease at $18.95 per square foot, full-service (all costs except cleaning and trash collection).

Modern office space is available at the PNC building in the downtown is available to lease for $20 per square foot (full-service). Older office space without parking is generally full-service in the low-to mid-teens per square foot.



3769 Columbus Pike

West Medical Center is an 23,782-square-foot medical office building at 460 W Central Avenue. The property was built in 2007 and there is currently 5,132 total square feet available for lease up to $16 per square foot, triple net (tenant responsible for all ongoing costs).

Demand: According to the Ohio Department of Job and Family Services', *2026 Job Outlook, Columbus Metropolitan Statistical Area,* the two most disproportionately low shares of businesses in the city are among the region's most rapidly growing sectors: Financial Activities and Professional/Business Services. These growing employment sectors operate in typical office environments, a limited real estate alternative in the City of Delaware. If the City of Delaware could capture 2.5% or 320 employees of the regions additional 12,782 employees projected within Financial Activities and Professional/Business Services growth, the market would support 70,000 to 80,000 square feet in the next five years.

A growing number of "white collar" employees have moved into the City of Delaware over the past two decades. With limited office space available, most residents commute outside the city to work.

COVID-19 caused a rise in office vacancy rates nationwide as many worked from home. In DDA's opinion, the office market will rebound post-COVID as people and employers feel safe to return to the workplace. According to Gensler Research Institute's *US Work From Home Survey 2020*, 88% of workers want to return to work in the office. The survey also cited that workers desire more space and designated desks for social distancing, a reversal of the prior trend of a high-density, shared-desk workspace environment that will positively impact the office market.

Priority Locations: Southeast, near restaurants; Downtown/Riverfront; Southwest (long-term, pending placement of restaurants)

Hotel

Inventory: There are four lodging properties in the City of Delaware totaling 193 rooms (excl. two B & Bs), 7.2% of Delaware County's lodging room inventory totaling 2,686.

Occupancy Rate: The overall occupancy rate is projected in the low- to mid-60 percentile, based on aggregate revenue.

Daily Rates: The City of Delaware has the oldest and lowest priced lodging stock in the county. Properties have published single-room occupancy room rates of $55 to $71.


Baymont Inn

Based on a macro-assessment of the lodging market, there is demand for a higher-priced hotel in the City of Delaware. The lack of quality lodging alternatives is resulting in visitors opting for overnight stays in Polaris and other areas outside the city.

Priority Location: Downtown

Downtown offers the greatest concentration of restaurants in the city and adjacent Ohio Wesleyan University (1,426 enrollment). The downtown is also directly accessible via US Highway 23.

Industrial

Inventory: DDA identified 6.5 million square feet of industrial buildings in the City of Delaware. The majority of industrial buildings, especially manufacturing and distribution, are owner-occupied facilities.

Occupancy Rate: The overall occupancy rate is high with just a total of 168,195 square feet of warehouse space and an estimated 18,000 square feet of flex space available to lease.

Lease Rates: The warehouse and flex space lease for $3.25 and $7 per square foot (NNN), respectively.


Symmetry II Building, flex space – 105 Innovation Drive

The new flex industrial development in the Innovation Center has attracted a wider range of business sectors than the traditional industry. Businesses in the Information and Professional, Scientific/Technical Services sectors (NAICS codes 51 and 54) can be accommodated by a higher share of office space with the flexibility for other uses in the raw warehouse area of the property. The properties along Innovation Drive are marketed as a "tech" hub targeting companies with research and development. According to the National Science Foundation, 30% of the domestic research and development spending occurs within these sectors.

Priority Locations: Flex space North of US Hwy 42; Light Manufacturing/Assembly along the Pittsburgh Drive Corridor/Airport

Employment

Labor Force: The City's resident labor force has increased approximately 60% in the past two decades totaling more than 21,000 employees and accounting for one-fifth of Delaware County's resident employment base.

The substantial growth in the local labor force was largely among residents with white-collar occupations, many of whom today must commute outside the city for work.

The modest business growth that has occurred in the manufacturing, construction, transportation and warehousing has been reliant on employers attracting more than half of its workforce from the surrounding counties.

Major Employers: The City of Delaware has 12 major employers with more than 200 employees.

FIRM	EMPLOYEES	INDUSTRY
Ohio Health (Grady Memorial Hospital)	1,500	Healthcare
Delaware County	1,091	Government
Kroger Great Lakes Distribution Center	680	Logistics
Delaware City Schools	646	Education
Ohio Wesleyan University	576	Education
Advance Auto Parts Distribution	406	Logistics
Vertiv	347	R&D/Testing
PPG Industries, Inc.	330	Manufacturing - Automotive Aftermarket Paints
City of Delaware	301	Government
Domtar/AHP	290	Manufacturing - Diaper and Hygienic Products
JEGS Automotive, Inc.	250	HQ/ Call Center/ Logistics/ Racing R&D
Liberty Castings	234	Foundry

Source: City of Delaware Economic Development

The labor force also supports major employers in the outlying areas of Delaware County, such as JPMorgan Chase & Company, Anthem BlueCross BlueShield, McGraw Hill, DHL Express, SHOWA and Optum.



Grady Memorial Hospital - Ohio Health

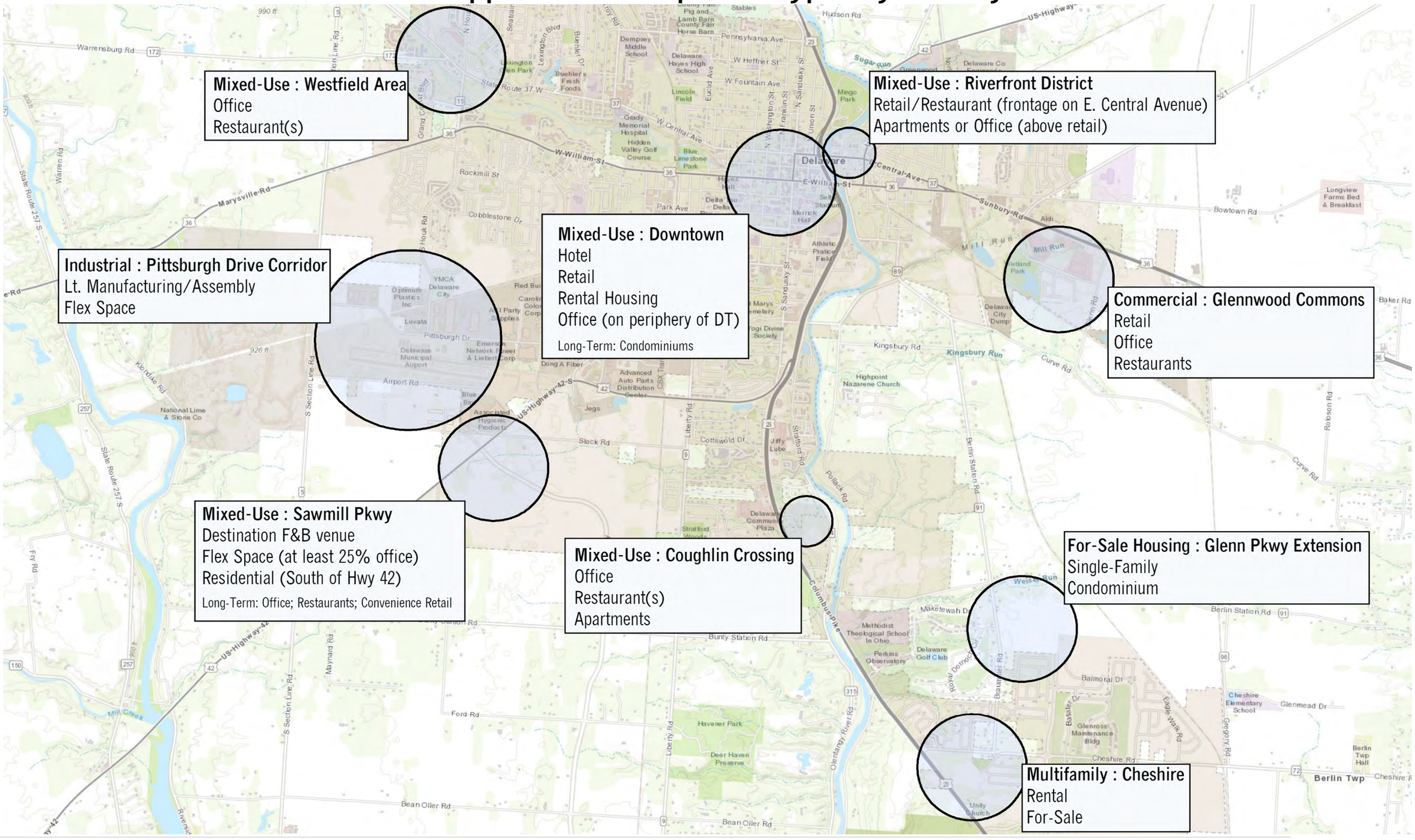
COVID 19 Impact:

Unemployment rates peaked in April 2020 at 14.1% and have continued to decline each month since to November's 3.7% rate. The total employment, as of November 2020, is down only 150 persons since Pre-COVID 19.

Overall employment in the City of Delaware and Delaware County was impacted less with fewer service-related jobs. Employment bounced back faster in the City of Delaware than the overall MSA which has a 4.9% unemployment rate (preliminary November 2020).

A map of market-supported development types by recommended priority areas follows.

Market-Supported Development Types by Priority Areas



Background

DDA is a full-service real estate market research firm providing market analyses, strategic planning and development advisory services to communities, developers and financial institutions. Pete DiSalvo, founder and president of DDA, has more than 20 years of experience in the industry and has worked in 46 states.

The objective of this report is two-fold:

1. It provides a detailed assessment and documentation of market-supported opportunities and highlights relevant market data sought by developers
2. A strategic tool for city staff charged with planning and incentivizing future development

Our methodology is based on a thorough supply/demand analyses including detailed field surveys of development types and demographic/economic factors. Recommendations for priority development locations are based on our nationwide experience and knowledge of site marketability and the economic impact of complementary uses.

Uses, Applications and Assumptions

Although this report represents the best available attempt to identify the current market status and future market trends, it is important to note that most markets are continually affected by demographic, economic and developmental changes.

The COVID 19 pandemic is unprecedented in modern-day history of the United States, exceeding health concerns and impacting local economies. Legislative mandates for temporary closures of many businesses, to curtail the spread of the virus and protect lives, comes at an economic cost. The most economically impacted industries include hotels, restaurants, retail trade, recreation and entertainment. In one way or another, many other businesses across the employment sectors are negatively impacted by COVID 19.

The length of business closures and temporary layoffs and the response in consumer confidence and spending will ultimately dictate the level of impact that COVID 19 will have on the overall economy and real estate industry. While low-interest rate financing remains available for builders and developers, it is DDA's opinion that the uncertainty of the economic toll of COVID 19 will likely create some pause and/or delays in real estate market activity.

This analysis also has been conducted with respect to a particular client's development objectives, and consequently has been developed to determine the current market's ability to support those particular objectives. For these reasons, the conclusions and recommendations in this study are applicable only to the City of Delaware.

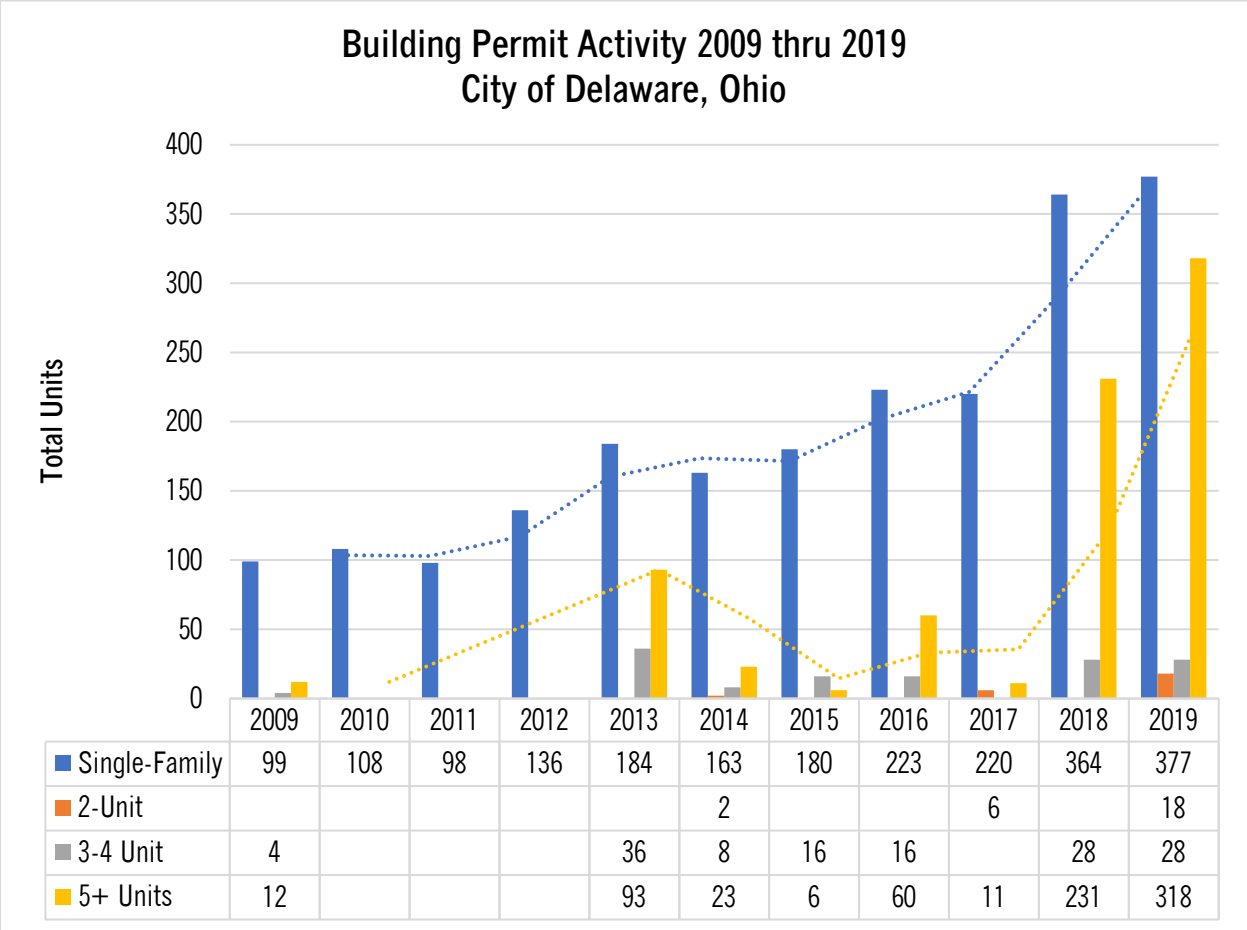
This study represents a compilation of data gathered from various sources, including the properties surveyed, local records interviews with local officials, real estate professionals and major employers and also the use of secondary demographic material. Although we judge these sources to be reliable, it is impossible to authenticate all data. The analyst does not guarantee the data and assumes no liability for any errors in fact, analysis or judgment. The conclusions contained in this report are based on the best judgments of the analysts; we make no guarantees or assurances that the projections or conclusions will be realized as stated.

II. Housing Market Conditions

Housing market conditions have been identified through analyses of rental and for-sale housing. The results of housing surveys are used to establish overall strength of the housing market and identification of gaps and opportunities.

1. Building Permit Activity

Housing construction has significantly increased from approximately 100 housing units from 2009 through 2011 to 623 to 741 in 2018 and 2019 (see chart below).



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Single-Family	99	108	98	136	184	163	180	223	220	364	377
2-Unit						2			6		18
3-4 Unit	4				36	8	16	16		28	28
5+ Units	12				93	23	6	60	11	231	318

Source: US Census Bureau, Building Permits Survey

The average annual single-family permits since 2009 are 196. Multifamily development of more than 50 units occurred in four years in the past decade.

There is limited activity for two-unit buildings, such as duplexes, attached condominiums or villas. The most recent development of two-unit buildings was at the Landings at Glenross, a condominium development in the southeast area of the city. The development also includes 28 units within seven four-unit buildings.

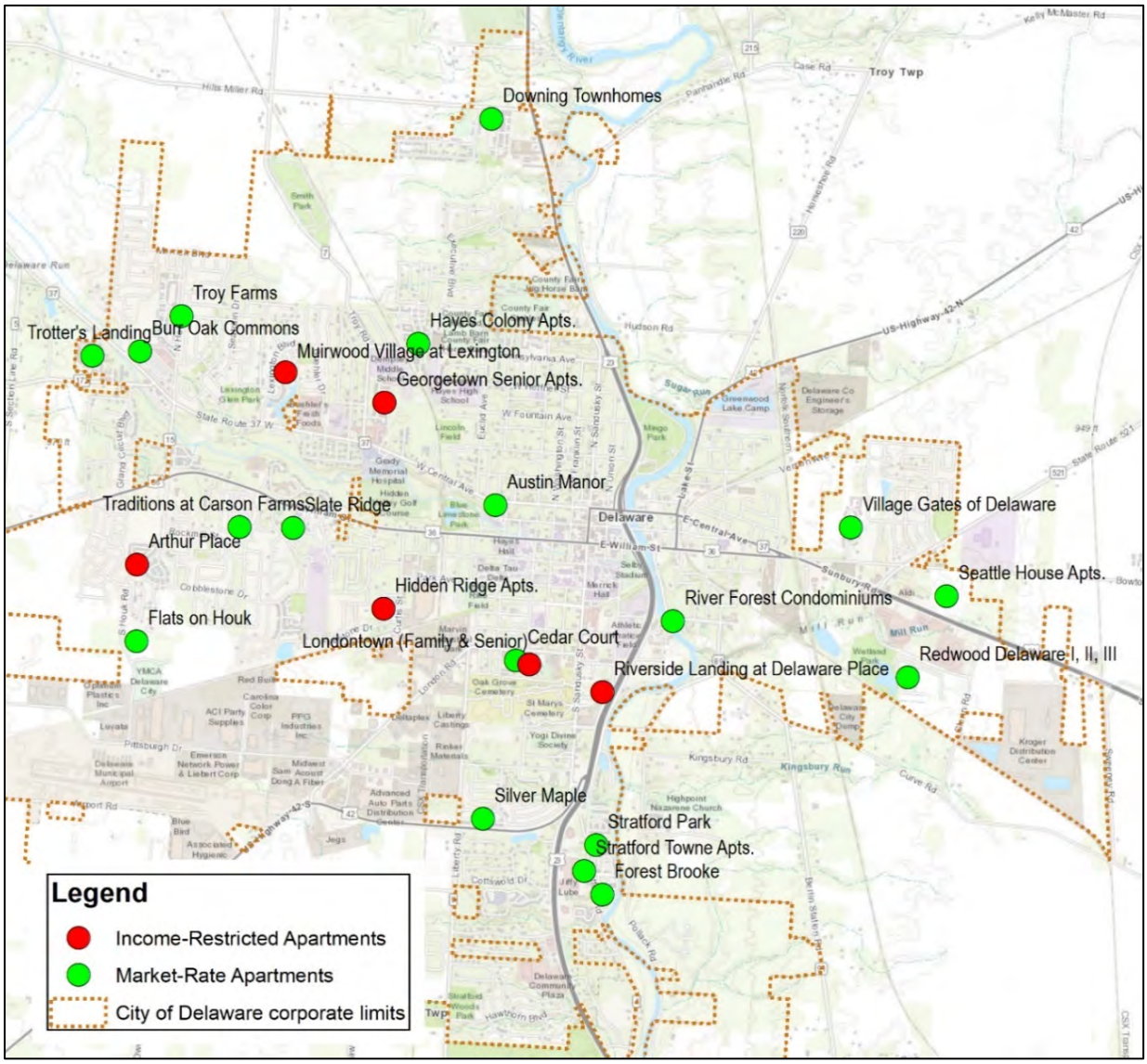
2. Multifamily Apartments

DDA has identified 28 rental housing developments in the City of Delaware of 50 or more units. Of those 28 developments, DDA staff was able to survey 24 apartment properties totaling 3,171 units. The apartment survey represents more than half the city's entire rental housing stock. At an overall 97% occupancy level, the local apartment market is strong with demand clearly limited by supply. A healthy market is considered to have an occupancy level of 95.0% which allows tenant mobility throughout the market. A distribution of units surveyed by housing type and occupancy follows.

Housing Type	Total Properties Surveyed	Total Units	Occupancy Rate
Market-Rate	18	2,648 (220 U/C)	96.1%*
Income-Restricted	6	523	100.0%
Total	24	3,171	96.8%*

*Includes vacancies from two properties in initial rent up period, Seattle House and Burr Oak Commons
U/C – Units are under construction at Seattle House and Redwood Delaware

Below is a locations map of the apartment properties surveyed in the City of Delaware.

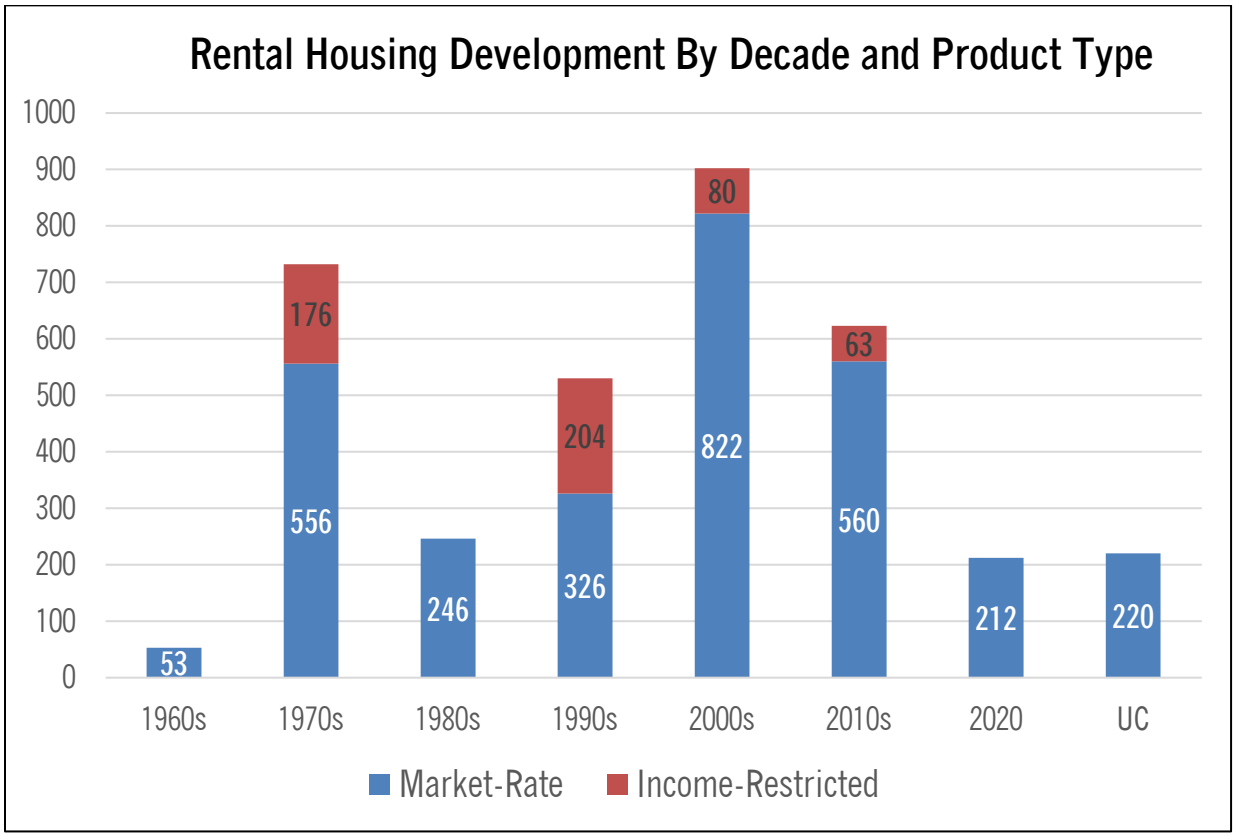


Market-rate

Two of the market-rate properties, Seattle House and Burr Oak Commons, are in the initial lease up period. Excluding these properties, the occupancy rate is 98.7%. Market-rate rental housing is considered as conventional apartments without income limit restrictions or rental assistance.

Income-restricted housing, operating under affordable housing programs, such as the Low-Income Housing Tax Credit program and HUD Section 8 program is 100% occupied and all but one property indicated lengthy waiting lists.

A distribution of rental housing development by product type and decade follows (non-participant market-rate properties totaling 347 units were included).



UC - Under Construction



The 220 under construction units are additional phases at Seattle House (120 units) and Redwood Delaware (100 units). The first available units at the second phase of Seattle House are expected in December 2020 and Redwood Delaware has a third phase in the initial phases of construction with units anticipated to open in September 2021 (see photo on right). A planned 178-unit apartment development in Coughlin Crossing, named Coughlin's Crossing Apartments, was recently approved by the City of Delaware. The project will include 14 buildings with apartments ranging in size from 620 square feet for a one-bedroom unit to 1,241 square feet for two-bedroom units. The proposed development will include a clubhouse and pool. Rent levels and timeline for construction were not available.

A summary of the market-rate properties surveyed in descending order of year built follows.

Project Name	Street Address	Year Open	Total Units	Vacancy Rate
Austin Manor	95 Elizabeth St	1923/1988	60	>5%
Cedar Court	159 London Rd	1969	53	0.0%
Stratford Towne Apts.	1345 Middlesex Ln	1972	128	0.0%
Olentangy View I & II	1241 Rivercrest Dr	1972/1997	110	Not Available
Georgetown Apartments	80 Georgetown Dr	1975	51	Not Available
River Forest Condominiums	90-200 Hayes Rd	1976	56	0.0%
Downing Townhomes	110 S Downing St	1977	54	0.0%
Hayes Colony Apts.	470 Heritage Blvd	1978	207	0.0%
Willows Apartments	2228 Bruce Rd	1979	134	Not Available
Rolling Meadows	105 Rolling Meadows Dr	1980	52	Not Available
Silver Maple	278 Silver Maple Dr	1992	128	>5%
Slate Ridge	50 New Market Dr	1993	76	0.0%
Forest Brooke	1493 Forest Brook Way	1998	72	<5%
Stratford Park	28 Sterling Ridge Dr	2000	79	0.0%
Trotter's Landing	1 Trotter's Cir	2000	218	>5%
Village Gates of Delaware	1 Village Gate Blvd	2000	221	0.0%
Troy Farms	124 Lippazon Way	2003	304	0.0%
Redwood Delaware I, II, III	20 Bur Reed Rd	2014	235 (100-UC)	0.0%
Traditions at Carson Farms	437 Sunburst Dr	2014	157	0.0%
Flats on Houk	1000 Solomon Sq	2019	168	<5%
Burr Oak Commons	90 Burr Oak Dr	2020	92	Initial Rent Up
Seattle House Apts.	1 Kerry Park Cir	2020	120 (120-UC)	Initial Rent Up
		Total	2,995 (220 – UC)	96.1%

UC - Under construction

Estimated vacancies by unit type, excluding properties in rent up phase, range from 1.1% in three-bedroom units up to 2.0% among one-bedroom units. No studio or efficiency units were identified in the City of Delaware. Market-rate rents vary widely from the older lower-quality 1960s/1970s apartments to the more modern apartments listed below.

	Collected Rents		Upper Quartile Rents	
Bedroom Type	Range	Average	Range	Properties
One-Bedroom	$625 - $1,175 (Burr Oak - $1,915)	$912	$935 - $1,915	Seattle House; Flats on Houk; Burr Oak Commons
Two-Bedroom	$650 - $1,715 (Burr Oak - $2,624)	$1,141	$1,195 - $2,624	Traditions at Carson Farms; Flats on Houk; Redwood Delaware; Burr Oak Commons; Troy Farms
Three-Bedroom	$860 - $1,486	$1,144	$1,195 - $1,486	Village Gates of Delaware; Traditions at Carson Farms; Troy Farms

The newer higher-priced properties in Delaware are on the eastern and western edges of the corporate limits. There are higher-priced remodeled rental alternatives in upper floors of buildings in downtown within the upper-quartile rent range, such as Sandusky Lofts, however, there are few of these units.



Sandusky Lofts

The rent per square foot among properties with upper-quartile rents, excluding Burr Oak Commons, ranges from $1.32 to $1.39 for a one-bedroom unit and $1.09 to $1.23 for a two-bedroom unit.

Three-bedroom single-family rentals in the area have been the high-end three-bedroom rental alternative in the market achieving monthly rents as high as $2,500. According to the five-year 2014-2018 American Community Survey, single-family rentals constitute 17.7% of the rental housing stock in Delaware. There are an estimated 1,062 detached single-family rentals in the City of Delaware (margin of error +/- 236).

Burr Oak Commons is a high-priced age-restricted community with large one-bedroom/1.5-bath and two-bedroom/2.5-bath units and attached garages. The rental rates were listed separately because they are anomalies to the remaining conventional rental housing market.

Income-Restricted

No vacancies were found among the six low-income and subsidized housing developments surveyed. Waiting lists range from 14 (Georgetown Senior) up to 108 households (Arthur Place).

A summary of the federally subsidized apartment properties follows.

Project Name	Program Type	Year Open	Total Units	Length of Waiting List
Londontown (88 units age-restricted)	HUD Section 8	1971	126	80
Georgetown Senior Apts.*	HUD Section 8 & LIHTC	1977	50	14
Muirwood Village at Lexington	Tax Credit	1991	144	17
Hidden Ridge Apts.	Tax Credit & HOME	1998	60	Not disclosed
Arthur Place	Tax Credit (28 HCV)	2009	80	108
Riverside Landing at Delaware Place*	Tax Credit	2013	63	29
		Total	523	

*Age-restricted

The rents at Londontown and Georgetown Senior Apartments are based on 30% of the resident's adjusted income. The collected monthly rents among the Tax Credit properties range from $496 to $891 for the one-bedroom units to $588 to $976 for two-bedroom units, depending on the income limitations ranging from 35% to 60% of area median household income (AMI). The Tax Credit rents at the 60% AMI level exceed rents achieved by market-rate properties built from 1993 to 2003.

The 60% AMI income limits are high enough that persons can afford many of the older market-rate properties in the area. A summary of the 2020 60% income limits by household sizes are listed below:

- One-person - $35,400
- Two-person - $40,440
- Three-person - $45,480

A distribution of renter household by income can be found in Section IV of this report.

3. For-Sale Housing

The City of Delaware had nearly 1,000 home sales from August 2019 through July 2020 (source: Delaware County Auditor).

One-third of the home sales were from newly constructed homes with the remaining resales of existing homes.

Home sales in the $200,000s accounted for 44.4% of all home sales. The next largest home sale price category was $300,000 to $350,000. A summary of home sales by price point, type and share of sales follows.



Home Sale Price	Existing Home Resales	New Home Sales	Total Sales	Share of Sales
Less than $100,000	33	-	33	3.4%
$100,000 - $149,999	63	-	63	6.5%
$150,000 - $199,999	89	-	89	9.3%
$200,000 - $249,999	188	25	213	22.1%
$250,000 - $299,999	133	82	215	22.3%
$300,000 - $349,999	62	80	142	14.8%
$350,000 - $399,999	36	70	106	11.0%
$400,000 and Higher	35	66	101	10.5%
Total	639	323	962	100.0%
Average	$242,562	$316,219		

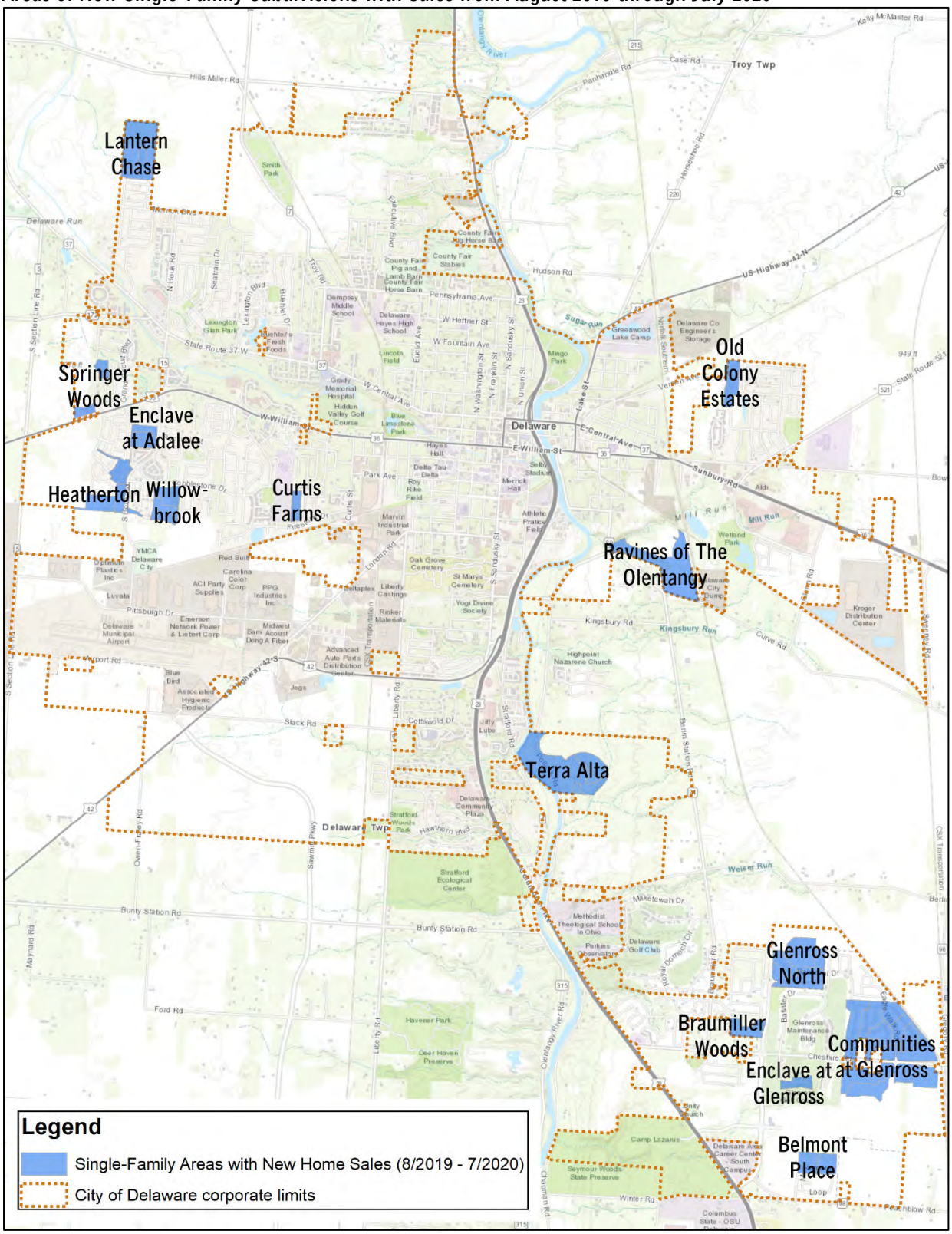
Source: Delaware County Auditor

New home sales occurred in 14 new single-family subdivisions in the City of Delaware. Of the 323 new home sales, 119 (36.8%) occurred in five subdivisions in the southeast portion of the city in the Olentangy School District:

- Glenross North
- Communities at Glenross
- Braumiller Woods
- Belmont Place
- Enclave at Glenross

The subdivision in the southeast area of the city represents the highest priced housing in the city. A map of these five subdivisions and other new subdivisions within the City of Delaware follows.

Areas of New Single-Family Subdivisions with Sales from August 2019 through July 2020



Note: Only active sections and phases within each subdivision are shown.

The Communities of Glenross has the widest range of home sale prices with more than $250,000 separating the lowest and highest prices. The subdivision has a higher than typical sales rate with an average of 5.6 homes sold per month. The next highest sales rates are among two of the lowest priced subdivisions in the city: Enclave at Adalee and Lantern Chase. The two lower-priced subdivisions average approximately three home sales per month and offer some of the smallest lot sizes averaging 0.11 to 0.18 acre. The average new home lot is about one-fourth an acre.



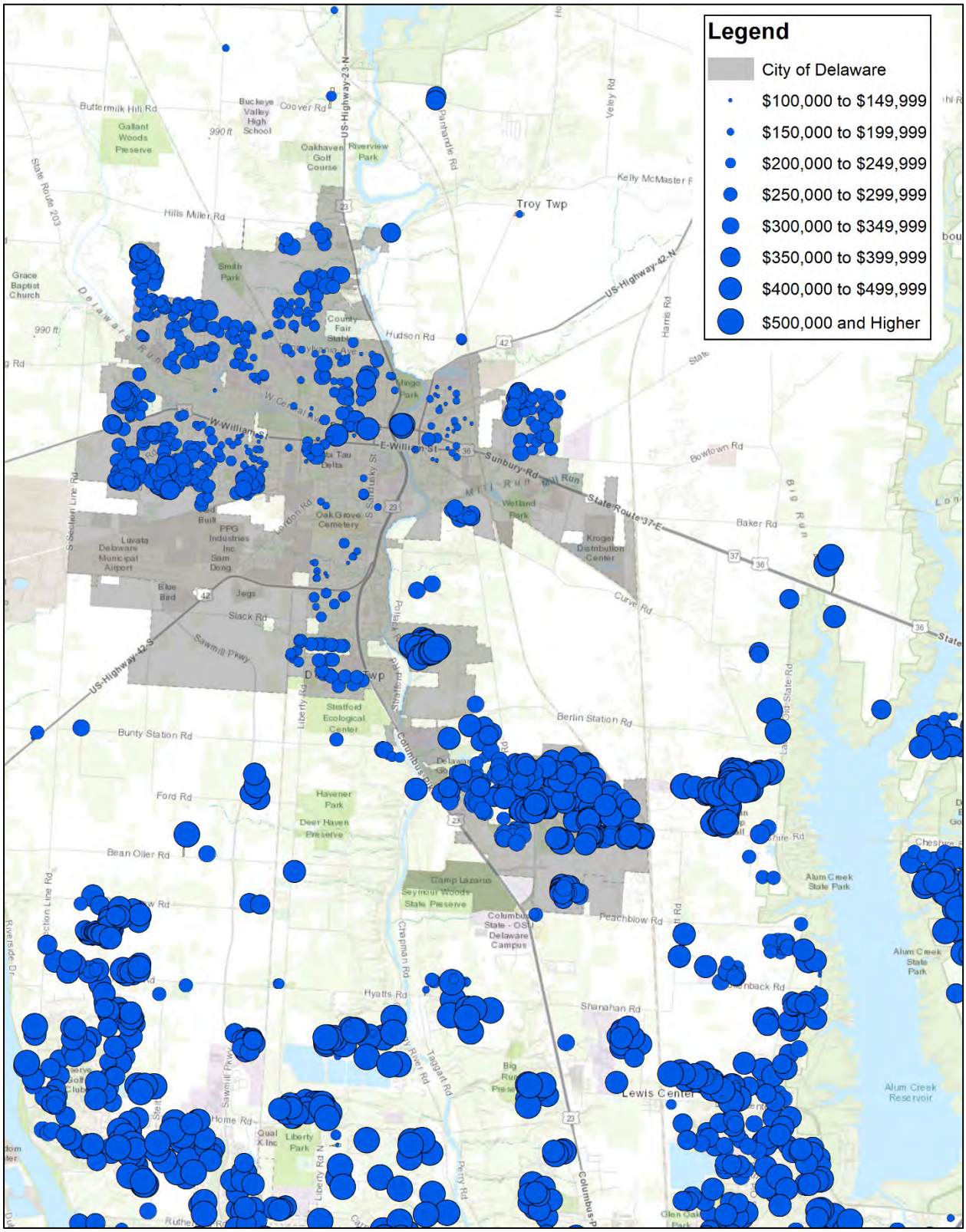
New Home Sales
Subdivisions
City of Delaware
August 2019 through July 2020

Subdivisions, Section or Phase	Total Homes Sold	Average Lot Size (Acres)	Home Sale Prices	Average Home Sale Price
Enclave at Adalee, PH 1 & 2	40	0.11	$200,000 - $275,910	$248,834
Lantern Chase, PH 2, Sec 6	32	0.18	$239,015 - $377,261	$294,208
Ravines of the Olentangy, Sec 1	22	0.22	$262,873 - $328,866	$294,324
Heatherton, PH 4, 7 & 8	31	0.21	$282,855 - $365,870	$297,053
Curtis Farms, PH 4	6	0.18	$254,130 - $347,310	$300,473
Old Colony Estates, PH 2	23	0.20	$350,590 - $362,765	$315,942
Willowbrook, Sec 2, PH 1, 2A & 2B	20	0.26	$272,640 - $406,266	$341,733
Springer Woods, PH 1 & 3	11	0.22	$272,780 - $424,563	$348,533
Belmont Place, Sec 4 & 5	21	0.21	$307,970 - $406,115	$363,418
Communities of Glenross, Sec 5 – 15	68	0.23	$298,550 - $555,455	$397,574
Braumiller Woods Sec 3	5	0.27	$358,257 - $459,576	$407,288
Terra Alta, Sec 1	19	0.31	$352,005 - $485,390	$418,753
Glenross North, Sec 1 & 2	22	0.33	$375,890 - $531,715	$427,094
Enclave at Glenross	3	0.32	$460,000 - $545,365	$497,080
	323	0.22	$200,000 - $555,455	$316,219

Source: Delaware County Auditor
Note: Parts of "PTs" of subdivision sections has been omitted.
PH – Phase
Sec – Section

As the dot density map on the following page illustrates, the City of Delaware offers a more affordable housing stock than the area, including southern Delaware County. In fact, according to the Columbus Realtors' Multiple Listing Service (MLS), the average home sale price for a home in the Delaware City School District in September 2020 was $249,045 compared to $447,896 in the Olentangy School District.

Home Sale Price Levels By Area
City of Delaware and outlying areas in Delaware County
August 2019 through July 2020



Condominiums

DDA identified 13 condominium developments in the City of Delaware totaling 747 units. Nearly all condominium developments were completed in multiple phases. Village at Lehner Farms is the largest condominium development in the city and was built by Dominion Homes at the peak of national homeownership rates. The development is a Traditional Neighborhood Development (TND) with modest-sized detached homes with detached garages accessed from alleys. The low home sale prices and financial incentives attracted many first-time homebuyers. Homes in Village at Lehner Farms remain affordable and recently sold in the $150,000 to $180,000 price range.

A summary of condominium development in the City of Delaware by development name, year(s) built and total units follows (a locations map can be found on the following page).

Condominium Development	Year(s) Built	Total Units
Landings at Glenross	2007 – 2018	53
Lakes at Cheshire	2006 – 2020	106
Village at Shelbourne Forest	2005	36
Village at Willowbrook Farms	2004 – 2006	64
Village at Lehner Farms	2003 – 2005	213
Trillium Condos at Willow Run	1999 – 2009	58
Timmons Woods	1997 – 2007	34
Sunnyview Village	1996 – 1998	34
Hanover Court	1994 – 2002	40
Bennington Cove	1990 – 1993	20
Country Meadows	1980 – 1981	16
Hayes Colony	1972	41
River Oaks	1972	32
	Total	747

Note: Condominium developments with high shares of rentals and those less than 16 units were omitted from the summary. The total units are estimated based on parcel data from the Delaware County Auditor.

Condominium development has been limited in the past decade with construction in only two developments: Lakes at Cheshire and Landings at Glenross. Both developments are located in Delaware's southeast area and began selling in 2006/2007, during the Great Recession, with sales and ongoing construction nearly nonexistent until 2012-2013. A summary of both condominium developments follows.

<u>Lakes at Cheshire</u>

Lakes at Cheshire has 106 attached units (as of date of report) and is located near the northeast quadrant of Cheshire Road and Columbus Pike (US Hwy 23). The property includes a 2,300-square-foot community building and outdoor pool. The development includes four- to nine-unit attached condominium buildings. Since 2017, sales levels have reached at least 15 each year. The peak sales were 19 in 2019. The 15 new sales in 2020 ranged in price from $245,000 to $310,000. One newly constructed home is currently listed as available for $309,987, including a $140 monthly association fee.

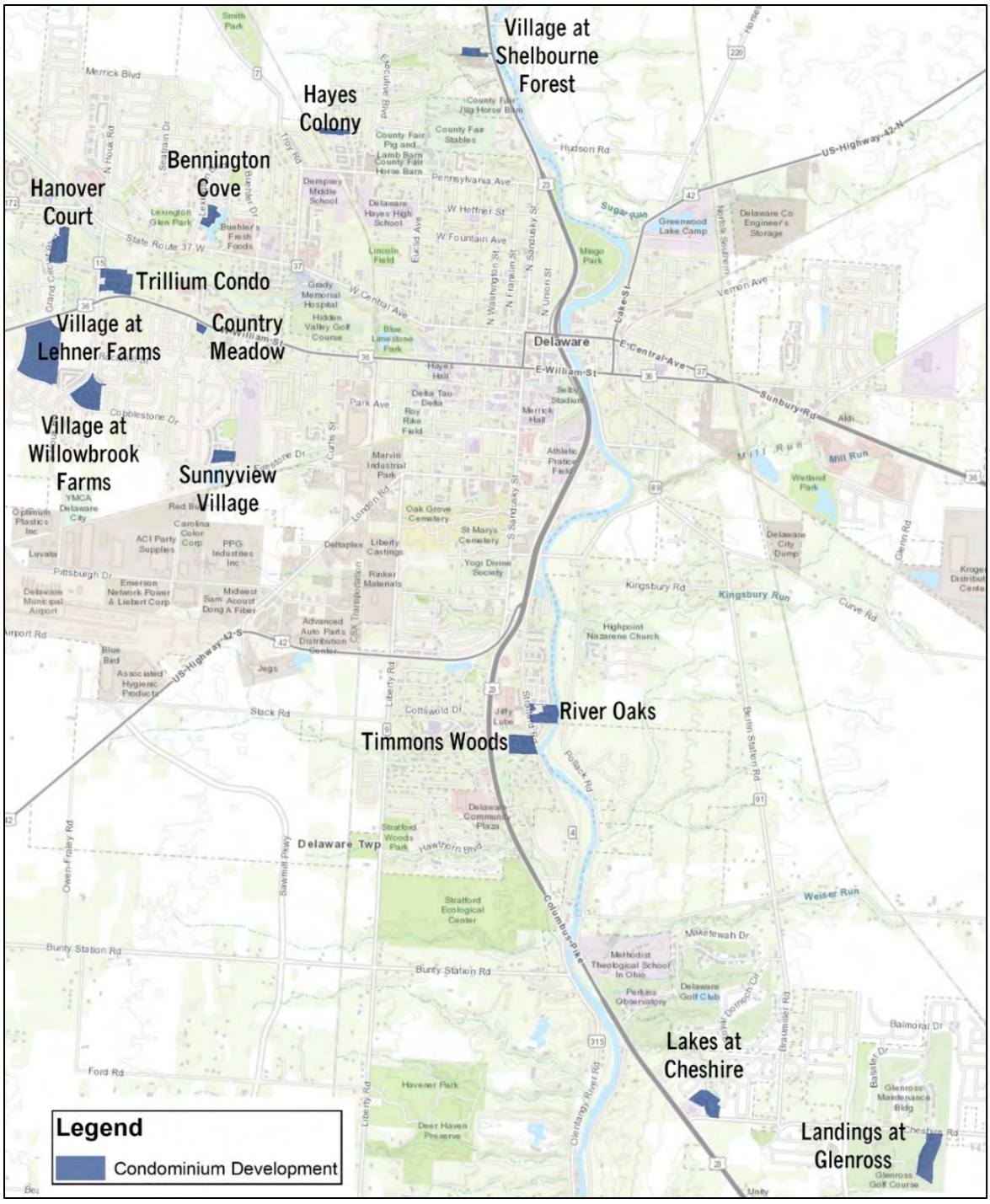


Lakes at Cheshire

Landings at Glenross

The development includes 53 homes situated adjacent fairways of Glenross Golf Club. The developer offered a mix of housing types with 15 detached homes, five duplexes, and seven four-plexes. The last seven units were sold in 2018 ranging in price from $313,340 to $350,000.

Condominium development largely started on the near west side of the city (Hayes Colony, Bennington Cove and Country Meadow), continued on the far west side (Trillium, Village at Lehner Farms and Willowbrook Farms), with the last development in the southeast area (Lakes at Cheshire and Landings at Glenross). A map of the condominium developments is below.



Commercial market conditions have been identified through analyses of retail and office space. The results of commercial surveys and business inventories are used to establish overall strength of the commercial market and identification of gaps and opportunities.

1. Retail Shopping Centers

DDA identified nine multi-tenant shopping centers in the City of Delaware totaling 1,131,018 square feet. Forty-five percent of the shopping center space had been built since 2000. A summary of the shopping centers, in descending order by overall size, follows.

Shopping Center	Year Built	Anchor Tenant(s)	Total Square Feet
Glennwood Commons	2008	Meijer; Kohl's	388,196
Delaware Community Plaza	1993	Kroger; Wal-Mart	244,771
Delaware Square	1985-1989	Goodwill	118,911
Westfield	2000	Kroger	115,121
800 W Central (fka Buehler's)	1986	-	94,660
Georgetown Centre	1968	-	64,551
Delaware Shopping Center	1972-1980	Big Lots (early 2021)	59,613
Troy Road	1960-1961	-	38,148
Shoppes @ Central Avenue	2018	-	7,047
		Total	1,131,018

Note: Outparcel buildings with a single tenant are not included in the total. Small strip centers with less than 5,000 square feet of retail or restaurant tenants not included.

Shopping centers of more than 100,000 square feet have an anchor tenant. Big Lots, currently located in the northernmost area of the city, has plans to move to the Delaware Shopping Center in early 2021. The anchor tenants occupy 45% of the overall shopping center space, with the exception of Delaware Community Plaza and Delaware Shopping Center, are owner occupants. The remaining 55% of retail space is leased. Based on DDA's review of broker listings, in-person observations and interviews with local brokers and owners, the estimated shopping center retail vacancy rate in the City of Delaware is currently at 11.2%. This is considered a modest vacancy rate, comparable to the the Columbus retail market. Discount Fashion Warehouse (DFW) will be replacing the space vacated by Office Max in Glennwood Commons.

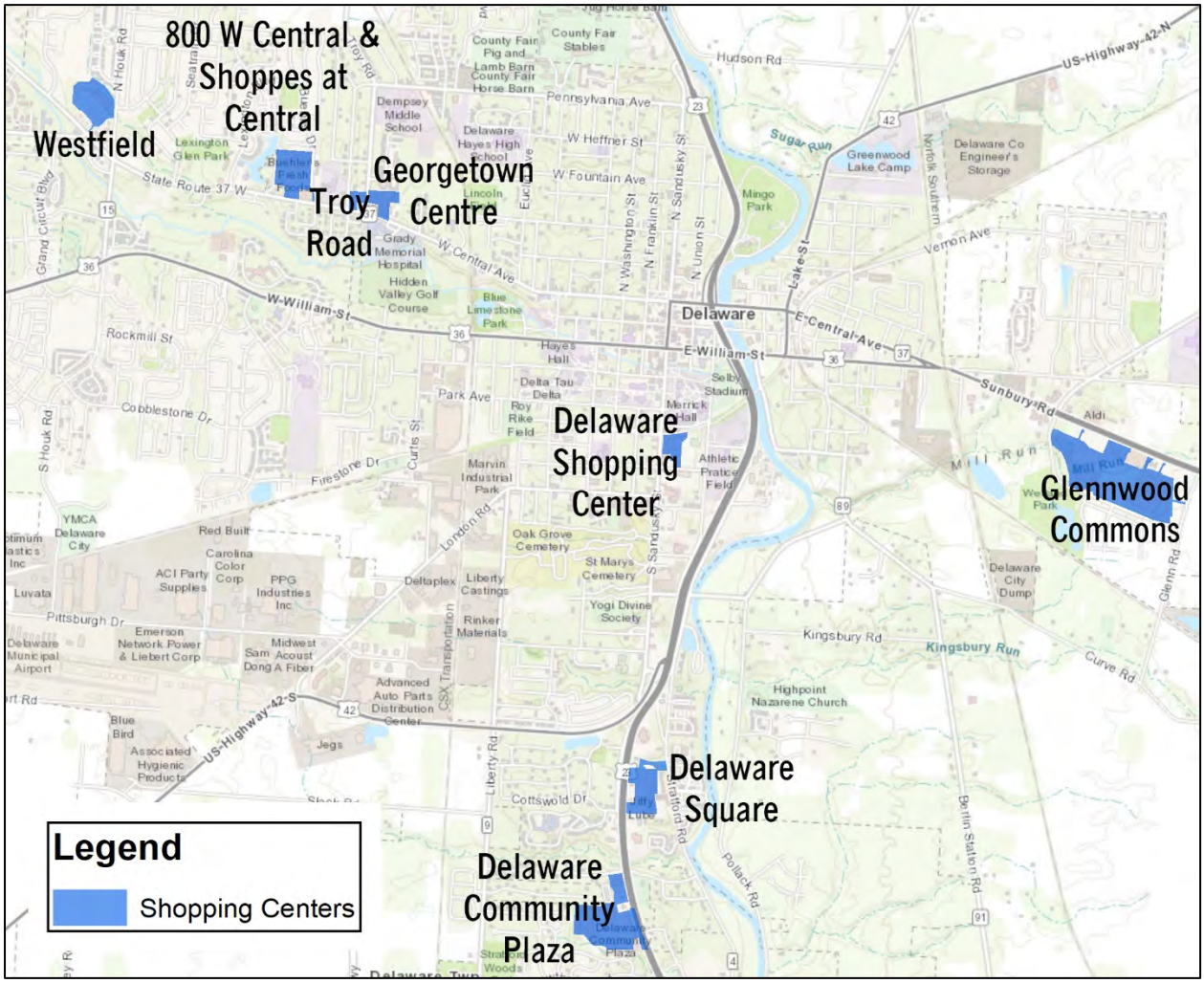


DFW is moving into a space at Glennwood Commons, formerly occupied by Office Max

The table below shows gross leasable space and availability by shopping center.

Shopping Center	Gross Leasable Square Feet	Available Square Feet		Vacancy Rate
		Store Sizes	Total	
Delaware Community Plaza	148,753	1,500 - 5,800	27,543	18.5%
Glennwood Commons	107,932	1,400 - 6,000	26,640	24.7%
800 W Central (fka Buehler's)	94,660	-	0	0.0%
Delaware Square	74,046	-	0	0.0%
Georgetown Centre	64,551	800 - 4,929	10,009	15.5%
Delaware Shopping Center	59,613	-	0	0.0%
Troy Road	38,148	1,000 - 1,250	2,350	6.2%
Westfield	33,625	2,800	2,800	8.3%
Shoppes @ Central Avenue	7,047	1,200	1,200	17.0%
Total	628,375	800 - 6,000	70,542	11.2%

The newest and largest shopping centers in the area are Delaware Community Plaza, Westfield and Glennwood Commons, each on the periphery of the city limits (see map below).



Prevailing lease rates in the market range from $8 per square foot (triple net) for large retail spaces and $16 to $20 for typical retail stores of 1,000 to 2,000 square feet, depending on the age and quality of the space.



Outparcel opportunities exist for 2.4 acres at Delaware Community Plaza and approximately 16 acres at Glennwood Commons. Glennwood Commons has another nine vacant acres situated between the two retail anchors, currently owned by Home Depot (see yellow boundaries of property on map). Home Depot has owned the property since 2007. Before COVID-19, there were plans to develop 96,000 square feet of additional retail space on the Home Depot property to accommodate Hobby Lobby, TJ Maxx, Ulta Beauty and Five Below. Plans also included an additional 12,540 square feet of space for a future tenant. Building permits were retracted at the start of COVID-19.

2. Retail Goods & Services/Restaurant Business Profile

DDA identified 225 retail and restaurant businesses within the City of Delaware operating within an estimated 1.3 million square feet of retail space. A distribution of businesses by type (NAICS code), total stores and store space follows.

Retail/Restaurant Group	NAICS Code	Total Stores	Store Size (Square Feet)	
			Total	Share
Furniture & Home Furnishings	442	6	49,323	3.8%
Electronics & Appliance	443	4	12,503	1.0%
Bldg Materials, Garden Equip & Supply	444	7	57,644	4.4%
Food & Beverage	445	8	360,630	27.5%
Health & Personal Care	446	12	58,147	4.4%
Gas Station	447	13	37,781	2.9%
Clothing & Clothing Accessories	448	6	14,890	1.1%
Sporting Goods, Hobby, Book & Music	451	8	15,800	1.2%
General Merchandise	452	7	279,551	21.3%
Miscellaneous	453	16	53,843	4.1%
Food Services & Drinking Places	722	97	257,037	19.6%
Personal Care Services	81	41	116,618	8.9%
	Total	225	1,313,767	100.0%

Sources: DDA, www.google.com, broker listings, Delaware County Auditor and Health Departments

Food and beverage and general merchandise establishments, many of which are anchor tenants in the shopping centers, such as Kroger and Meijer, account for nearly half of the space occupied by retailers and restaurants in the marketplace.

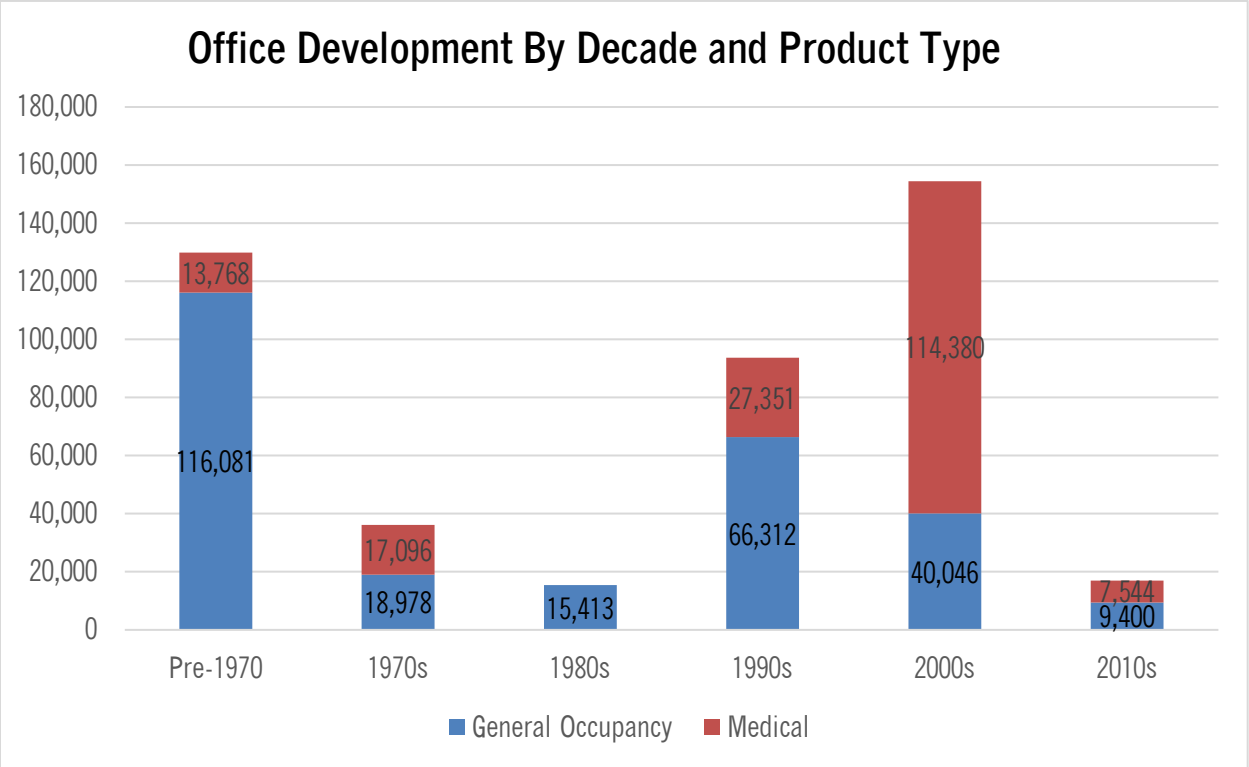
The downtown area has 36 (37.1%) of the city's 97 restaurant and drinking places.

3. Office Space

DDA identified approximately 450,000 square feet of office space in the City of Delaware within buildings with 5,000 or more square feet. Medical office buildings represent 40% of the office market, many of which are owner-occupied buildings.

As the table below shows, medical office space has dominated the office market since 2000, led by Ohio Health's 67,833-square-foot Delaware Medical Campus at the south end of the city limits.





Source: Delaware County Auditor, Loopnet, Columbus Board of Realtors, Jobs Ohio and DDA

The overall vacancy rate of leasable office space is estimated at 20%, comparable to the regional office market. Overall, the available office spaces in the city are small and, except for a flex office space, we were unable to identify any modern contiguous office space of 5,000 or more square feet. Therefore, the current office market cannot adequately accommodate businesses with approximately 20 or more employees.

The city's largest general occupancy office development is a 31,346-square-foot multi-tenant building located at 3769 Columbus Pike. The building was constructed in 2005 and is 80% occupied with vacant space available to lease at $18.95 per square foot, full-service (all costs except cleaning and trash collection). The property is in the southern end of the City of Delaware more than two miles from the nearest restaurants, except Glenross Golf Club. It is DDA's opinion that while tenants of the property benefit from ease of access to the location, the low occupancy is reflective of the remote location from available area amenities.



3769 Columbus Pike

Most older office buildings are in the downtown area. CoHatch's adaptive reuse of an historic 9,400-square-foot Old Gazette building in the downtown area is the city's newest office property. The cowork space, Newstand, has approximately 20 private offices with four listed as available (source: delawaremeansbusiness.com).

Aside from some newly renovated office space downtown, such as the Kern Building, the most modern conventional office building in the downtown is the PNC Bank building at 40 N Sandusky Street. The second and third floors of the building include 13,650 square feet of office space. The third floor is 100.0% occupied and the second floor has two small suites of 900 and 1,000 square feet vacant and available to lease for $20 per square foot (full-service). Older office space without parking is generally full-service in the low- to mid-teens per square foot.



40 N Sandusky Street, ground floor bank and upper floor offices

Delaware Commerce Center is an example of an office development including several office and flex-office buildings totaling 28,000 square feet (includes warehouse space). A total of 6,000 square feet are available for lease at $13.75 per square foot, modified gross. Two spaces, 2,400 and 3,600 square feet, are available and can be combined. The larger space includes a drive-in bay area connected to the warehouse/storage/ assembly areas of the building.



Delaware Commerce Park

West Medical Center is an 23,782-square-foot medical office building at 460 W Central Avenue. The property was built in 2007 and there is currently 5,132 total square feet available for lease ranging from $10 to $16 per square foot, triple net (tenant responsible for all ongoing costs). The lower-priced lease is for a lower level space in the building.

4. Lodging

A hotel market feasibility study was not included within the initial scope of analysis. However, we are providing this section simply to identify general characteristics of lodging alternatives and market observations based on DDA's experience with lodging in similar markets. Furthermore, COVID-19 has made conducting a survey of properties and identifying demand drivers challenging. A survey of properties and potential users, post COVID-19, will be required to accurately assess the depth of the market for additional lodging.

There are four lodging properties in the City of Delaware totaling 193 rooms, 7.2% of Delaware County's lodging room inventory totaling 2,686. The Polaris Area in south Delaware County includes 17 properties representing all the chain scale categories or price points, except Luxury. A summary of each of the lodging properties in ascending order of year open by area follows.

Area	Property Name	Year Open	Chain Scale	Rooms
City of Delaware	Pacer Inn & Suites	1950	Independent/Economy	34
	Travel Inn	1970	Independent/Economy	31
	Quality Inn & Suites Delaware	1995	Midscale	57
	Baymont Inn & Suites Delaware	1997	Midscale	71
			Total Rooms	*193**
Berkshire Township/ Sunbury	Hampton Inn	1996	Upper Midscale	60
	Holiday Inn Express & Suites	1998	Upper Midscale	61
	Travelodge Sunbury	1999	Economy	61
			Total Rooms	*182*
Polaris Area/ Columbus	Four Points by Sheraton	1998	Upscale	100
	Extended Stay America	1998	Economy	123
	Comfort Inn North Polaris	2000	Upper Midscale	93
	Homewood Suites by Hilton	2002	Upscale	92
	Nationwide Hotel & Conference Center	2002	Independent	192
	Hilton Garden Inn Columbus Polaris	2005	Upscale	118
	Candlewood Suites Polaris	2006	Midscale	122
	Hampton by Hilton Inn & Suites	2008	Upper Midscale	118
	Hilton Columbus Polaris	2008	Upper Upscale	252
	Cambria Hotels Columbus-Polaris	2009	Upscale	125
	Fairfield Inn & Suites Columbus Polaris	2009	Upper Midscale	125
	Holiday Inn Express & Suites	2011	Upper Midscale	104
	Residence Inn Columbus Polaris	2014	Upscale	104
	Staybridge Suites Columbus Polaris	2017	Upscale	119
	Renaissance Columbus Westerville	2018	Upper Upscale	222
	Drury Inn & Suites & Suites	2019	Upper Midscale	187
	Home2 Suites by Hilton	2021	Upper Midscale	115
			Total Rooms	*2,311*

Sources: Smith Travel Research (STR); Delaware County Auditor
*Does not include the two three-room bed and breakfast properties

The City of Delaware has the oldest and lowest priced lodging stock in the county. Properties have published single-room occupancy room rates of $55 to $71. The two oldest properties, Pacer and Travel Inns, are motor lodge style with exterior entrances to each room. Pacer appears well maintained and includes a 120-capacity meeting space. Baymont Inn, formerly Best Western, is a two-story walkup hotel (no elevator).



Pacer Inn & Suites

The four lodging properties generated $2.7 to $2.9 million a year from 2017 to 2019 (source: City of Delaware). Based on revenues and published rates, DDA estimates that the overall occupancy rate is in the low- to mid-60 percentile. This rate is indicative of strong lodging demand, despite the limited offerings.

City of Delaware
Hotel Bed Tax and Revenue

Year	Bed Tax (3%)	Revenue
2017	$82,835	$2,761,167
2018	$85,748	$2,858,267
2019	$79,740	$2,658,000

The City of Delaware, notably, has no options in the moderate to higher-priced Upper Midscale or Upscale hotels. Upper Midscale hotels, such as Holiday Inn Express or Fairfield Inn, are in many smaller markets, such as Marion and Marysville, Ohio. Visitors are commonly referred to the Polaris area for an overnight stay.

The Polaris area hotels benefit from proximity and direct access to Interstate 71, a concentration of corporate office users and a wide variety of traveler services, including restaurants, shopping and entertainment. From 2017 through 2019, Upper Midscale and Upscale properties in the Polaris area have operated at high occupancy levels and Average Daily Rates (ADRs).

Polaris Area
Upper Midscale & Upscale Properties

Year	Total Rooms	Occupancy Rate*	ADR*
2017	1,668	67.6%	$131.43
2018	1,787	67.3%	$126.81
2019	2,009	70.1%	$127.17

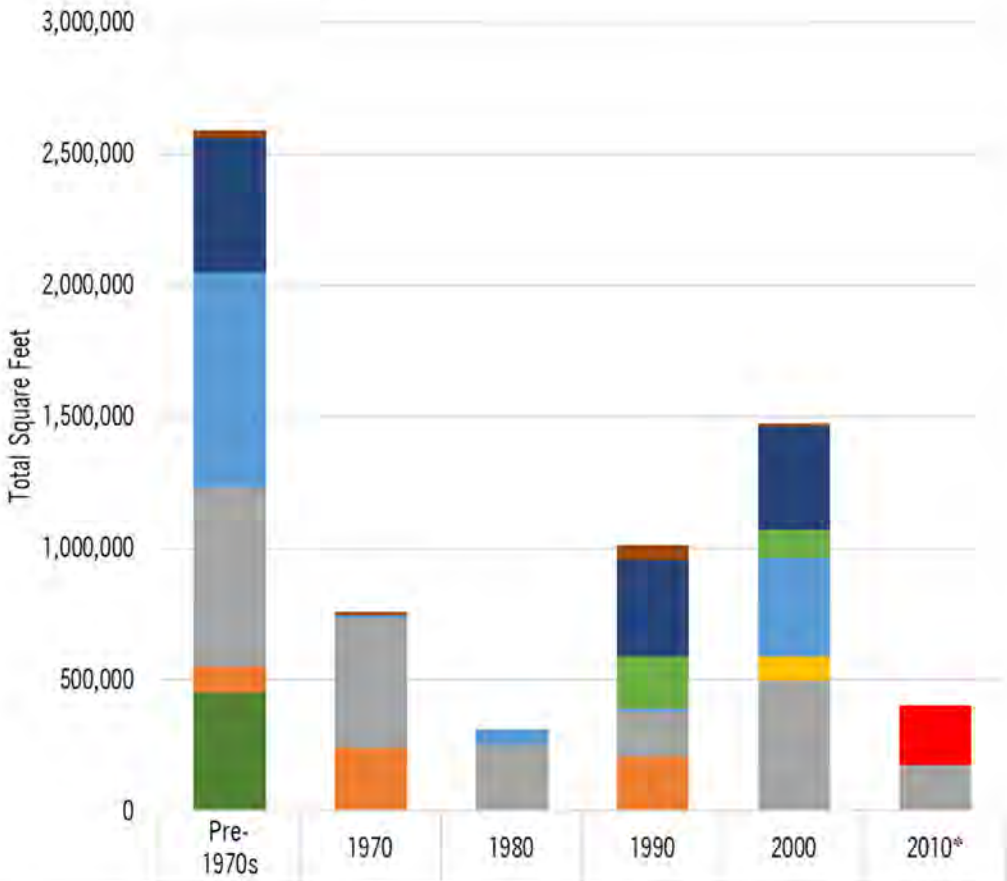
Note: DDA assumes the table is for a competitive set and not the overall market.
*Source: The Witness Group

All the hotels in Berkshire Township/Sunbury are next to each other situated at the northwest quadrant of the I-71/Hwy 36 interchange and have published rates from $79 to $96.

Based on reported countywide tax revenue, Delaware County had lodging revenue in 2017 and 2018 of $52.4 to $59.0 million. In a 65% occupancy scenario, properties in the overall county generate approximately 610,000 room nights and an ADR of $97. Excluding the City of Delaware properties, the estimated ADR is $105. As a comparison, the Columbus market had a 66.5% occupancy rate and a $106.61 ADR in 2019 (source: Experience Columbus).

DDA identified 6.5 million square feet of industrial buildings in the City of Delaware. The majority of industrial buildings, especially manufacturing and distribution are owner-occupied facilities. A total of 168,195 square feet of warehouse space and an estimated 18,000 square feet of flex space is available to lease. The warehouse and flex space lease for $3.25 and $7 per square foot (NNN), respectively. A distribution of industrial buildings by type, square footage and decade built follows.

Distribution of Industrial Buildings, City of Delaware



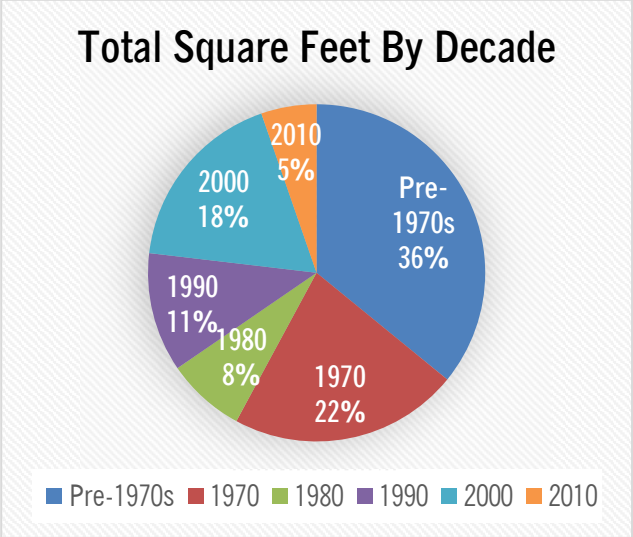
	Pre-1970s	1970	1980	1990	2000	2010*
Flex (25% or more office)						228,600
Small Shops (Less than 20% office)	29,253	13,076		58,208	12,000	
Distribution	511,877			362,100	393,394	
Warehouse (6% to 20% office)				198,811	103,837	
Warehouse (less than 6% office)	819,459	12,700	61,129	11,944	374,140	
Lt. Manuf/Assembly (10% to 20% office)					90,000	
Lt. Manuf/Assembly (10% or less office)	680,188	490,834	242,498	169,501	498,228	175,532
Med. Manuf/ Assembly	99,626	242,919	6,480	208,162		
Foundry/ Heavy Manuf.	450,816					

Note: Totals do not include cold storage, food processing, aviation facilities and other non-classified industrial structures.
Sources: Delaware County Auditor, City of Delaware, Broker Listings and DDA

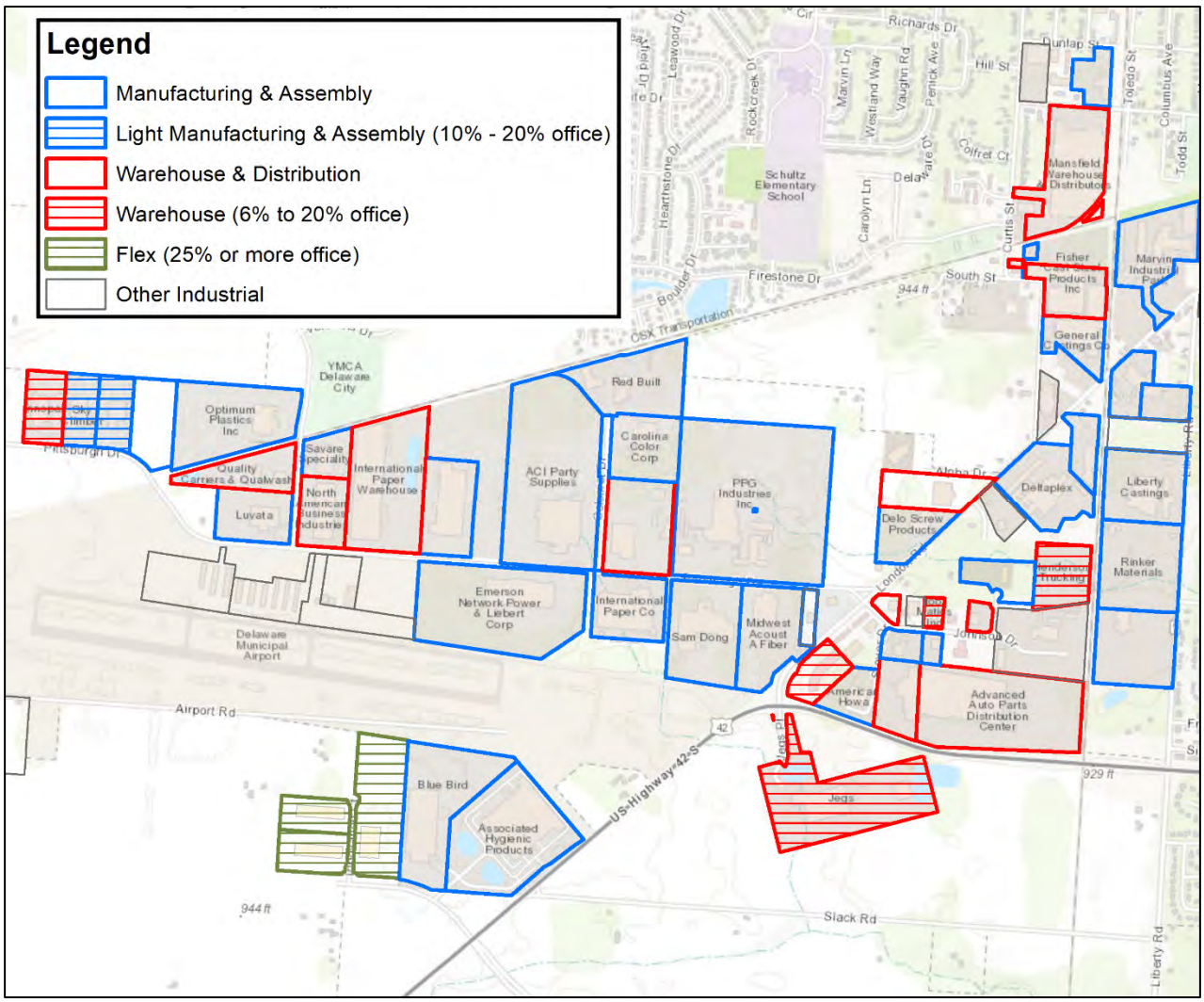
Two-thirds of industrial space in the City of Delaware is more than 30 years old, with more than one-third built more than 50 years ago.

Manufacturing facilities (light, medium and heavy) represent slightly more than half the overall industrial space.

Warehouse and distribution facilities are 45% of the industrial space with Flex space representing just 3.5% of the overall space, but 56.7% of development in the past decade. Flex spaces are those industrial buildings with 25% or more of the space dedicated for office use.



Except for Kroger's distribution facility along US Hwy 36 on the east edge of Delaware, nearly all of the industrial space in the city is on the southwest side. A map of industrial space in the southwest area, by major categories and share of office space follows.



DDA

Most tenants within these facilities identify in the Manufacturing, Wholesale Trade and Transportation & Warehousing sectors, NAICS codes 31-33, 42 and 48-49, respectively.

The new flex industrial development in the Innovation Center has attracted a wider range of business sectors than the traditional industry. Businesses in the Information and Professional, Scientific/Technical Services sectors (NAICS codes 51 and 54) can be accommodated by a higher share of office space with the flexibility for other uses in the raw warehouse area of the property. The properties along Innovation Drive are marketed as a "tech" hub targeting companies with research and development. According to the National Science Foundation, 30% of the domestic research and development spending occurs within these sectors.

Symmetry II, built in 2016, is 100.0% occupied. Tenants at the property include Guild Associates, CAMs, American Apex, and Mako Power. According to the Delaware County Auditor, 15,000 square feet or 25% of the overall space at Symmetry II is office space. A second flex building is under construction north of Symmetry II and is reportedly 60% to 70% occupied.



Symmetry II Building – 105 Innovation Drive



Back side of new flex Space - 109 Innovation Drive

Adjacent Symmetry II, is a large-scale flex industrial building, owned and operated by Nagase Chemtex, formerly Engineered Material Systems, Inc (EMS). The property includes 27,600 square feet of office and 81,000 square feet of warehouse space.



Jegs corporate headquarters, the only industrial building south of US Highway 42, has a similar-size office to Nagase Chemtex with a larger distribution/warehouse and separate research and development building. While DDA did not categorize their buildings as "flex" space, because of the lower share of office to warehouse space, when all buildings are combined, the overall Jegs campus shares similar aspects of flex industrial.

A. Area Demographics

1. Population Trends

The population in the City of Delaware has rapidly increased each of the past decades. The population for 2000, 2010, 2020 (estimated) and 2025 (projected) are summarized as follows:

	Year			
	2000 (Census)	2010 (Census)	2020 (Estimated)	2025 (Projected)
Population	26,010	34,813	40,977	44,121
Population Change	-	+8,803	+6,164	+3,144
Percent Change	-	33.8%	17.7%	7.7%

Source: 2000, 2010 Census; ESRI Incorporated

The population is projected to increase by 3,144 or 7.7% between 2020 and 2025. The population growth rate is slightly below overall Delaware County (9.6%) and 2.3 percentage points above the Columbus Metropolitan Statistical Area (5.4%).

2. Household Trends

Households are a better indication of housing demand than population, especially with numbers of persons per households declining nationally. Household trends within the city are summarized as follows:

	Year			
	2000 (Census)	2010 (Census)	2020 (Estimated)	2025 (Projected)
Households	9,794	13,278	15,764	17,021
Household Change	-	3,484	2,486	1,257
Percent Change	-	35.6%	18.7%	8.0%
Household Size	2.45	2.47	2.48	2.48

Source: 2000, 2010 Census; ESRI Incorporated

Households increased by 3,484 from 2000 to 2010. The household base experienced an increase of 2,486 households between 2010 and 2020. By 2025 the household base is projected to continue to increase to 17,021 households, a change of 8.0% since 2019. The average household size has been projected to remain relatively stable at an estimated 2.48 persons in 2020 and 2025. The estimated average household size matches the average for the metropolitan region and is below the Delaware County average of 2.73 persons per household. The larger average household size in Delaware County is attributed to the high share of homeowners (78.5%) largely residing in single-family homes.

Between 2020 and 2025, the greatest growth among household age groups is projected to be among the households ages 65 and older indicating an increasing need for housing for older adults/seniors in the market. A modest decline is projected among households younger than 25 and 35 to 64. Households by age are summarized as follows:

Households by Age	2020 (Estimated)		2025 (Projected)		Change 2020-2025	
	Number	Percent	Number	Percent	Number	Percent Points
Under 25	761	4.8%	809	4.8%	48	-0.1%
25 to 34	2,516	16.0%	2,777	16.3%	261	0.4%
35 to 44	3,190	20.2%	3,355	19.7%	165	-0.5%
45 to 54	3,128	19.8%	3,159	18.6%	31	-1.3%
55 to 64	2,670	16.9%	2,773	16.3%	103	-0.6%
65 to 74	2,080	13.2%	2,414	14.2%	334	1.0%
75 & Over	1,420	9.0%	1,732	10.2%	312	1.2%
Total	15,764	100.0%	17,021	100.0%	1,257	-

Source: ESRI, Incorporated

There is a projected one-percentage point tenure shift from 2010 to 2025, toward homeowners with an estimated increase of 2,454 homeowners versus a 1,289 increase in renter households. There remains an above average share of renters relative to the region. Households by tenure are distributed as follows:

Tenure	2010 Census		2020 (Estimated)		2025 (Projected)	
	Number	Percent	Number	Percent	Number	Percent
Owner-Occupied	8,097	61.0%	9,749	61.8%	10,551	62.0%
Renter-Occupied	5,181	39.0%	6,015	38.2%	6,470	38.0%
Total	13,278	100.0%	15,764	100.0%	17,021	100.0%

Source: ESRI, Incorporated

3. Household Income Trends

The distribution of households by income within the City of Delaware is summarized as follows:

Household Income	2020 (Estimated)		2025 (Projected)	
	Households	Percent	Households	Percent
Less Than $15,000	1,048	6.6%	941	5.5%
$15,000 to $24,999	922	5.8%	878	5.2%
$25,000 to $34,999	1,238	7.9%	1,222	7.2%
$35,000 to $49,999	2,145	13.6%	2,173	12.8%
$50,000 to $74,999	3,071	19.5%	3,237	19.0%
$75,000 to $99,999	2,615	16.6%	2,860	16.8%
$100,000 to $149,999	2,396	15.2%	2,882	16.9%
$150,000 to $199,999	138	8.8%	1,777	10.4%
$200,000 & Over	941	6.0%	1,051	6.2%
Total	15,764	100.0%	17,021	100.0%
Median Income	$69,051		$75,371	

ESRI, Incorporated projects a significant increase among households earning more than $100,000 from 2020 to 2025.

The following table shows the estimated number of owner households within the City of Delaware by size and income projected for 2025.

Owner Households	1-PPH	2-PPH	3-PPH	4-PPH	5+PPH	Total, All Ages	Age 65+
Less than $15,000	128	44	12	18	8	210	132
$15,000 - $24,999	113	21	8	9	2	153	139
$25,000 - $34,999	248	138	21	6	8	421	248
$35,000 - $49,999	343	241	71	45	15	716	419
$50,000 - $74,999	538	816	280	126	135	1,894	718
$75,000 - $99,999	495	856	389	281	201	2,223	349
$100,000 - $149,999	170	833	469	528	320	2,320	302
$150,000 or more	94	801	605	733	381	2,614	411
Total	2,129	3,750	1,855	1,746	1,071	10,551	2,717
Share	20.2%	35.5%	17.6%	16.5%	10.1%	100.0%	25.8%

PPH – Persons Per Household
Note: The data is derived from HUD's Economic and Market Analysis Division, 2018 ACS county data and has been adjusted accordingly by DDA to reflect 2020 household estimates for the city.

Owner households of one- to two-persons represent slightly more than half of the homeowners in the City of Delaware, bolstered by one-fourth homeownership by householders age 65 and older. The high share of older adult homeowners and limited condominium offerings indicates an untapped condominium market.

There is twice the share of one-person renter households, representing 41.5% of the renter base. The following table shows the estimated number of renter households within the City of Delaware by size and income projected for 2025.

Renter Households	1-PPH	2-PPH	3-PPH	4-PPH	5+PPH	Total, All Ages	Age 65+
Less than $15,000	500	161	28	28	14	731	252
$15,000 - $24,999	480	94	50	44	57	725	279
$25,000 - $34,999	373	174	86	86	83	801	198
$35,000 - $49,999	696	352	224	120	63	1,457	301
$50,000 - $74,999	427	527	235	107	46	1,343	255
$75,000 - $99,999	95	252	136	103	51	637	72
$100,000 - $149,999	87	155	122	98	100	562	59
$150,000 or more	26	42	60	40	45	214	12
Total	2,685	1,757	941	626	460	6,470	1,429
	41.5%	27.2%	14.6%	9.7%	7.1%	100.0%	22.1%

PPH – Persons Per Household
Note: The data is derived from HUD's Economic and Market Analysis Division, 2018 ACS county data and has been adjusted accordingly by DDA to reflect 2020 household estimates for the city.

New market-rate rental housing development generally caters to renters with incomes of $40,000 and higher. By 2025, there will be an estimated 3,727 renter households with incomes above $40,000. DDA expects a site-specific market-rate property to capture 5% to 7% of the target market, depending on the characteristics of the site and the surrounding environment. Applying these capture rates to the income-appropriate renter households

equates to potentially building a single market-rate project of 186 to 260 units. Based on the five-year market-rate potential of 590 units, the market can absorb up to three of market-rate projects over the next five years (source: *Residential Market Analysis*, Randall Gross).

The remaining 2,743 renter households with incomes below $40,000, represent demand for additional affordable housing in the market. There are 523 income-restricted units in the City of Delaware, all occupied and operating from waiting lists. The Residential Market Analysis estimates demand for 360 to 600 units within this income group. The Low-Income Tax Credit program represents the most likely vehicle to develop additional affordable housing. Based on our interview with developers, the minimum threshold to consider development is a project with at least 40 units.

4. Consumer Spending

Retail Trade

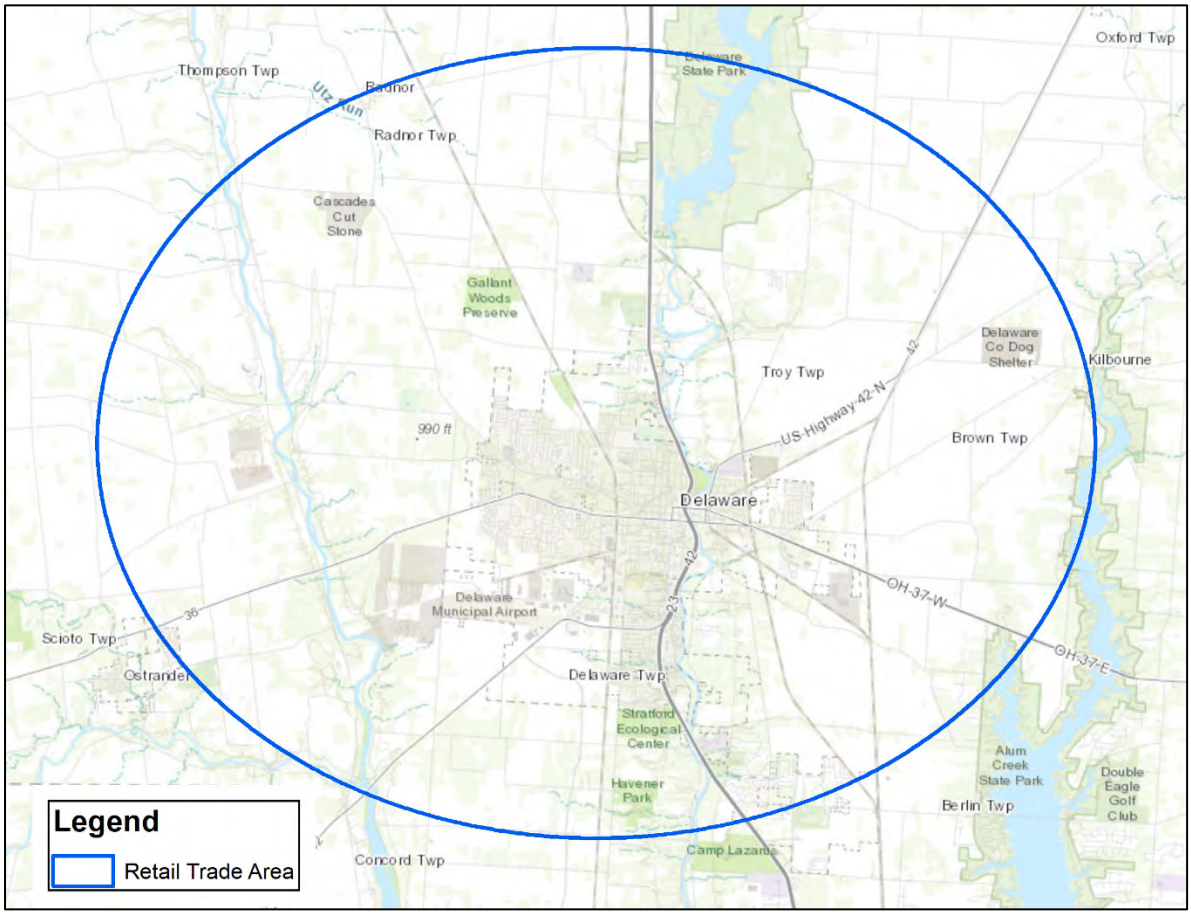
By 2025, City of Delaware residents will have an estimated retail trade spending potential of $700 million, approximately $100 million above current estimated retail spending, of which $55 million represents retail trade excluding automobile and online sales. The additional spending has the potential to support another 180,000 square feet of retail space by 2025. A summary of estimated consumer spending power in the City of Delaware by retail trade group and year follows.

NAICS Code	Retail Trade Group	2020 (Estimated)	2025 (Projected)	Share
441	Motor Vehicle & Parts Dealer	$142,043,989	$167,326,606	23.6%
442	Furniture & Home Furnishings	$11,438,281	$13,474,197	1.9%
443	Electronics & Appliance Stores	$8,989,552	$10,589,616	1.5%
444	Bldg. Materials, Garden Equip & Supply	$41,193,826	$48,525,975	6.8%
445	Food & Beverage	$90,105,201	$106,143,158	15.0%
446	Health & Personal Care	$33,580,490	$39,557,530	5.6%
447	Gasoline Stations	$63,411,511	$74,698,219	10.5%
448	Clothing & Clothing Accessories	$19,915,449	$23,460,228	3.3%
451	Sporting Goods, Hobby, Book & Music	$8,715,576	$10,266,874	1.4%
452	General Merchandise	$81,537,217	$96,050,145	13.5%
453	Miscellaneous	$10,971,179	$12,923,955	1.8%
454	Non-store (including online sales)	$90,335,695	$106,414,677	15.0%
	Total	$602,237,965	$709,431,180	100.0%

Sources: 2017 Economic Census; ESRI, Incorporated and DDA

According to the 2017 Economic Census, retail sales within the City of Delaware totaled $745,611,000. The substantially higher sales than consumer spending potential is attributed, in large part, to out-of-town consumers buying vehicles, parts and purchasing gasoline and convenience goods. In 2017, the non-auto retail trade groups accounted for approximately $350 million, approximately 110% of the local estimated spending. Therefore, external support represents at least 10% of total retail sales and likely upwards of 30%.

Based on drive times and the location of competing retail on the periphery of the City of Delaware, DDA has identified the following Retail Trade Area:



The trade area has a population 10,000 above the City of Delaware and in 2017 has current sales potential of $650 million, of which approximately $425 million are non-automobile. The trade area consumer spending potential is 80% of local estimated sales. By 2025, the non-automobile spending potential in the trade area is projected to increase to $477 million.

Based on our inventory of all retailers in the City of Delaware, we estimate the current retail sales among non-auto and non-store retail is approximately $370 million, a $20 million increase since 2017. Residents within the trade area have a spending potential approximately $110 million in excess sales within the City of Delaware. However, $20 million of the additional spending is projected among grocery stores and other food and beverage facilities, which in DDA's opinion, can be accommodated by current businesses through 2025. The potential unmet demand for the $90 million retail spending could generate approximately an additional 210,000 square feet of occupied retail space in the City of Delaware.

Restaurants

According to the 2017 Economic Census, sales within the City of Delaware among food services and drinking places totaled $82 million. With a current food and beverage inventory of 257,037 square feet, sales in 2017 equated to $319 per square foot. This is considered a healthy overall sales per square foot amount. During this time City of Delaware residents

were spending $54 million at these businesses, or 65.6% of total sales. Within the retail trade area, residents were spending $66 million at restaurants and drinking establishments, reflecting 80% of sales, similar to the retail trade market.

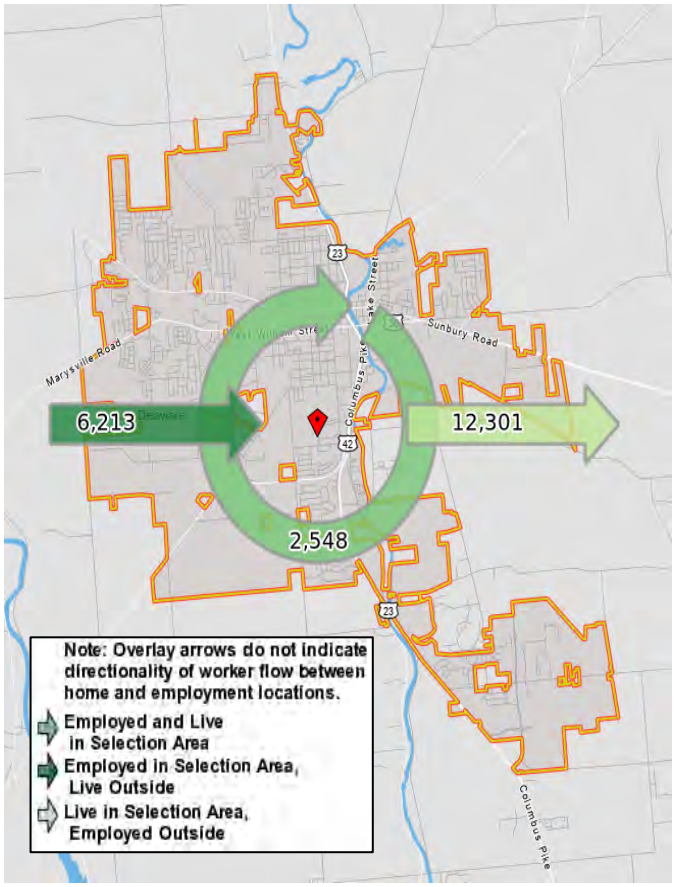
By 2025, DDA projects restaurant spending power within the local trade area will reach $87 million. Assuming 80% of the restaurant spending occurs in the trade area, at an average of $325 per square foot, in the next five years there is potential to support another 50,000 square feet of food and beverage space in the City of Delaware.

B. Economy

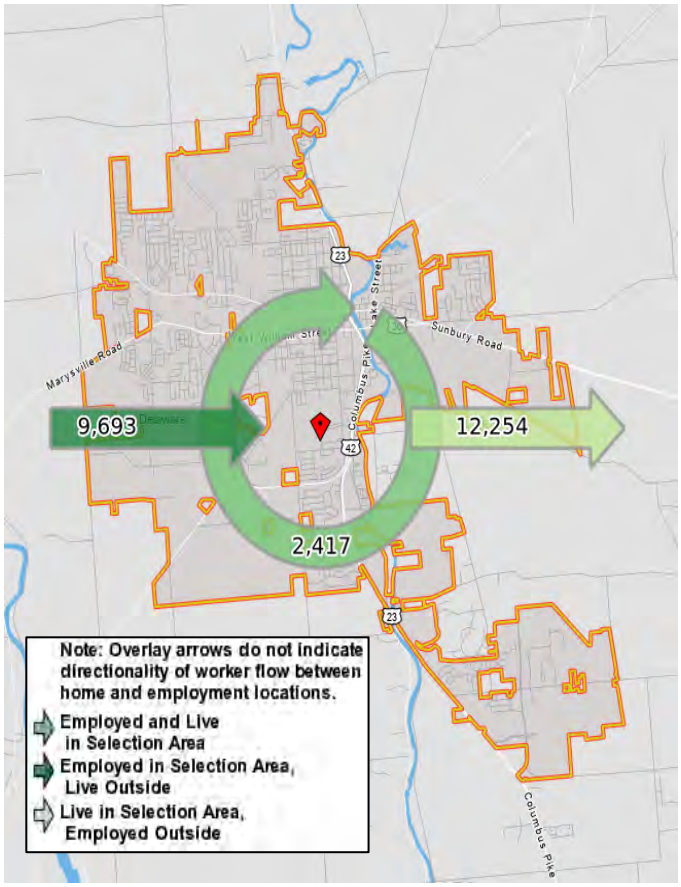
1. Employee Commuting Trends

A comparison of Census' 2002 and 2018 Longitudinal Employer-Household Dynamics private employment data shows that fewer residents work within the city limits while the share of non-residents commuting to work in Delaware has increased from 70% to 80%.

2002 Employee Commuting Patterns



2018 Employee Commuting Patterns



Since 2002, private employment among city residents has remained relatively stable. During this period, however, there was an increase of 3,349 private sector employees, largely captured by persons commuting into the City of Delaware. According to ESRI, Incorporated, two-thirds (66.7%) of the employed residents have a white-collar occupation, below the high share within overall Delaware County (78.2%), but comparable to Franklin County (67.8%) and the Columbus MSA (66.5%) and well above the statewide average (60.6%).

A further comparison of employment among industry classes for 2002 and 2018, shows the distribution of employment in the city by industry class has remained relatively unchanged. Among residents, however, there has been a significant shift toward employment in the "All Other Services" category, represented with white-collar industries.

2002 Distribution of Employment – Commuters and Resident Employees

Industry Class	Employed in City, Live Outside	Employed & Live in City	Total Citywide Employment	Share of Citywide Employment	Live in City, Employed Outside	Total Resident Employment	Share of Resident Employment
Goods Producing	1,654	611	2,265	25.9%	2,569	3,180	21.4%
Trade, Transportation and Utilities	1,734	440	2,174	24.8%	3,143	3,583	24.1%
All Other Services	2,825	1,497	4,322	49.3%	6,589	8,086	54.3%
Total	6,213	2,548	8,761	100.0%	12,301	14,849	100.0%

The employment profile of the city in 2002 was generally representative of the resident labor force during that period. However, the significant shift in resident employment classes over the past two decades, now has an employment base that requires significant commuter support as more residents leave the city for work.

2018 Distribution of Employment – Commuters and Resident Employees

Industry Class	Employed in City, Live Outside	Employed & Live in City	Total Citywide Employment	Share of Citywide Employment	Live in City, Employed Outside	Total Resident Employment	Share of Resident Employment
Goods Producing	2,398	592	2,990	24.7%	1,827	2,419	16.5%
Trade, Transportation and Utilities	2,785	402	3,187	26.3%	2,707	3,109	21.2%
All Other Services	4,510	1,423	5,933	49.0%	7,720	9,143	62.3%
Total	9,693	2,417	12,110	100.0%	12,254	14,671	100.0%

The top 50 census tracts where commuters reside is largely within Delaware, Morrow, Marion and Union counties (see map below). Workers also reside in the northern portion of Franklin County, outside of the I-270 outer belt, but the most concentrated resident commuter area is 10% of the highest concentrated worker area in Delaware.

United States Census Bureau **OnTheMap**

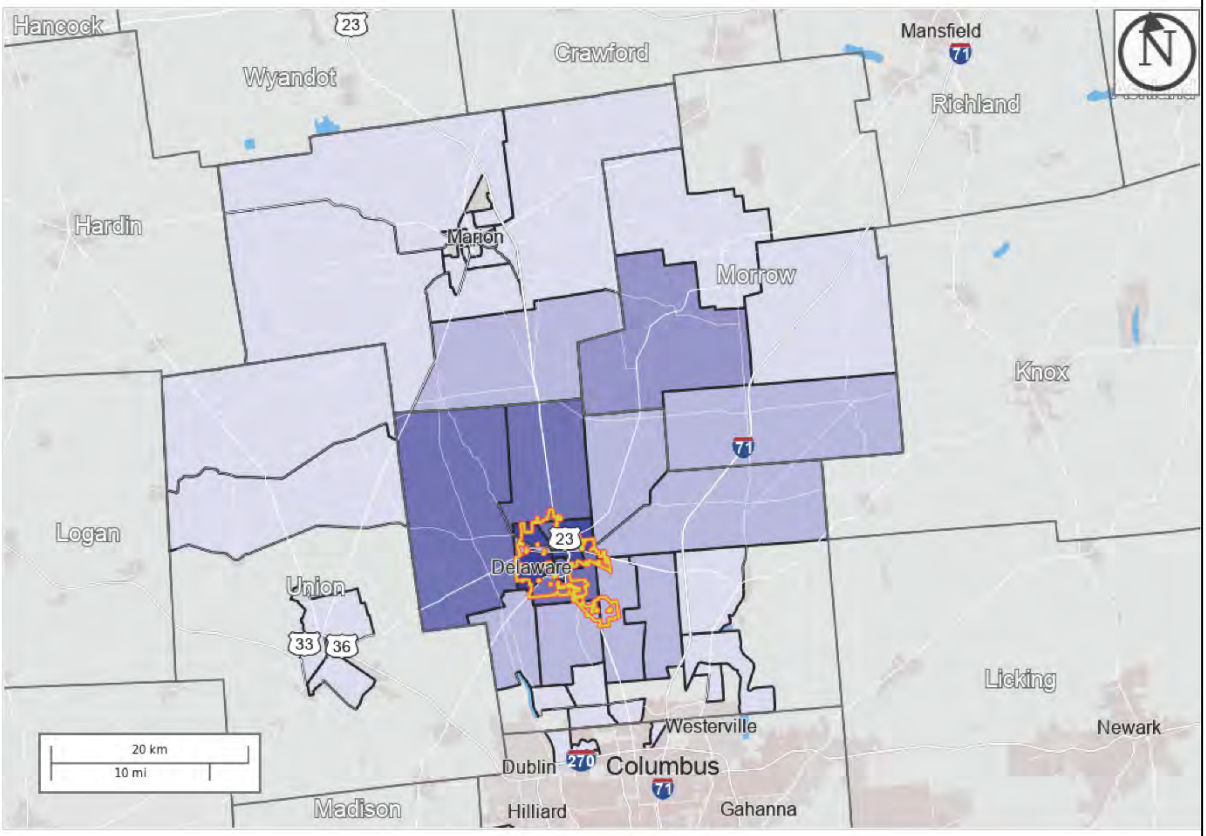
Home Destination Report - Work Selection Area to Home Census Tracts

Private Primary Jobs for All Workers in 2018

Created by the U.S. Census Bureau's OnTheMap https://onthemap.ces.census.gov on 12/10/2020

Counts of Private Primary Jobs from Work Selection Area to Home Census Tracts in 2018

All Workers



Map Legend

Job Count
- 397 - 457
- 337 - 396
- 277 - 336
- 217 - 276
- 157 - 216
- 97 - 156
- 36 - 96

Selection Areas
- Analysis Selection



United States Census Bureau

Page 1 of 4

DDA

2. Labor Force Profile

The workforce in the City of Delaware has a slightly higher share of young workers (ages 29 and younger) compared to the Columbus Metropolitan Statistical Area (26.4%). The area has a much higher share of low-wage earners (26.4% in Delaware compared to 18.6%) and low share of upper-wage earners (38.6% in Delaware, 46.5% in Columbus MSA). A summary of employee profiles by income, age and industry is in the tables below (source: 2018 Longitudinal Census data).

City of Delaware – Employee Profile (worked in City of Delaware in 2018)

Employee Income (2018)	<30	30 - 54	55+	Total	Share
Less than $15,000	1,822	847	523	3,192	26.4%
$15,000 - $39,999	1,317	2,076	850	4,243	35.0%
$40,000 and Higher	499	2,920	1,256	4,675	38.6%
Total	3,638	5,843	2,629	12,110	100.0%
Share	30.0%	48.2%	21.7%	100.0%	

In comparison to the region including Delaware, Marion, Morrow and Union Counties, the City of Delaware has a share of employment higher than 2.8 percentage points in the Manufacturing, Transportation/Warehousing, Educational Services and Health Care/Social Assistance (sources: Census LEHD).

Industry Class	Industry Sector (2018)	Total	City Share	Regional Share	Percentage Point Difference
Goods Producing	Agriculture, Forestry, Fishing & Hunting	2	0.0%	0.8%	-0.8%
	Mining, Quarrying & Oil/Gas Extraction	0	0.0%	0.1%	-0.1%
	Construction	474	3.9%	4.0%	-0.1%
	Manufacturing	2,514	20.8%	17.9%	2.9%
	Subtotal	*2,990*	24.7%	*22.8%*	*1.9%*
Trade, Transportation & Utilities	Utilities	27	0.2%	0.3%	-0.1%
	Wholesale Trade	187	1.5%	3.2%	-1.7%
	Retail Trade	1,794	14.8%	12.9%	1.9%
	Transportation and Warehousing	1,179	9.7%	3.4%	6.3%
	Subtotal	*3,187*	26.3%	*19.8%*	*6.5%*
All Other Services	Information	55	0.5%	0.7%	-0.2%
	Finance and Insurance	195	1.6%	5.2%	-3.6%
	Real Estate	148	1.2%	1.1%	0.1%
	Professional, Scientific, & Technical	305	2.5%	7.2%	-4.7%
	Mgt. of Companies and Enterprises	92	0.8%	9.8%	-9.0%
	Admin & Support, Waste Mgt. & Rem.	596	4.9%	9.1%	-4.2%
	Educational	634	5.2%	1.1%	4.1%
	Health Care & Social Assistance	2,113	17.4%	9.3%	8.1%
	Arts, Entertainment & Recreation	149	1.2%	2.1%	-0.9%
	Accommodation & Food	1,265	10.4%	9.2%	1.2%
	Other Services (excl. Public Admin)	381	3.1%	2.7%	0.4%
	Subtotal	*5,933*	*49.0%*	*57.4%*	*-8.4%*

The majority of persons employed in the Goods Producing industry, which includes the Manufacturing sector, earn in excess of $40,000 a year or $18.75 per hour. The share of workers earning $40,000 in the Goods Producing class is 67.4%, 3.2 percentage points lower than the region (70.6%).

Industry Class	Annual Estimated Pay (Hourly Rate)		
	Less than $15,000 (<$7.21)	$15,000 - $39,000 ($7.21 - $18.75)	$40,000+ (>$18.75)
Goods Producing	142	832	2,016
Trade, Transportation & Utilities	830	1,189	1,168
All Other Services	2,220	2,222	1,491
Total	3,192	4,243	4,675

The "All Other Services" Class is significantly underrepresented in the City of Delaware, relative to regional average. Specifically, the counties in the region collectively have more than two times the employment than the City in the following sectors:

- Information
- Finance and Insurance
- Real Estate
- Professional, Scientific and Technical
- Mgt. of Companies and Enterprises
- Admin. & Support, Waste Mgt. and Rem.

The sectors above typically operate in office environments, a limited real estate alternative in the City of Delaware. Delaware County, however, has a higher share of employment in this sector group than the region (38.0%), many located in the Polaris area.

3. Projected Employment

According to the Ohio Department of Job and Family Services', *2026 Job Outlook, Columbus Metropolitan Statistical Area,* employment in the Columbus MSA is projected grow nearly 100,000 from 2016 through 2026. A summary of the projected changes in the industries or employment categories follows.

Significant Growth	Modest Growth	Decline
• Construction	• Mining	• Manufacturing
• Financial Activities	• Retail Trade	• Information
• Professional & Business Services	• Leisure and Hospitality	• Agriculture, Forestry, Fishing and Hunting
• Education and Health Services	• Other Services	

The City of Delaware is capitalizing on the growth in the Education and Health Services sector by attracting new medical businesses with modern medical office space, such as the West Medical Center. The two most disproportionately low shares of businesses in the city are among Financial Activities and Professional and Business Services. As the table on the

following page shows, these two categories have among the highest projected employment gains.

Columbus Metropolitan Statistical Area
Projected Employment Growth
2016 through 2026

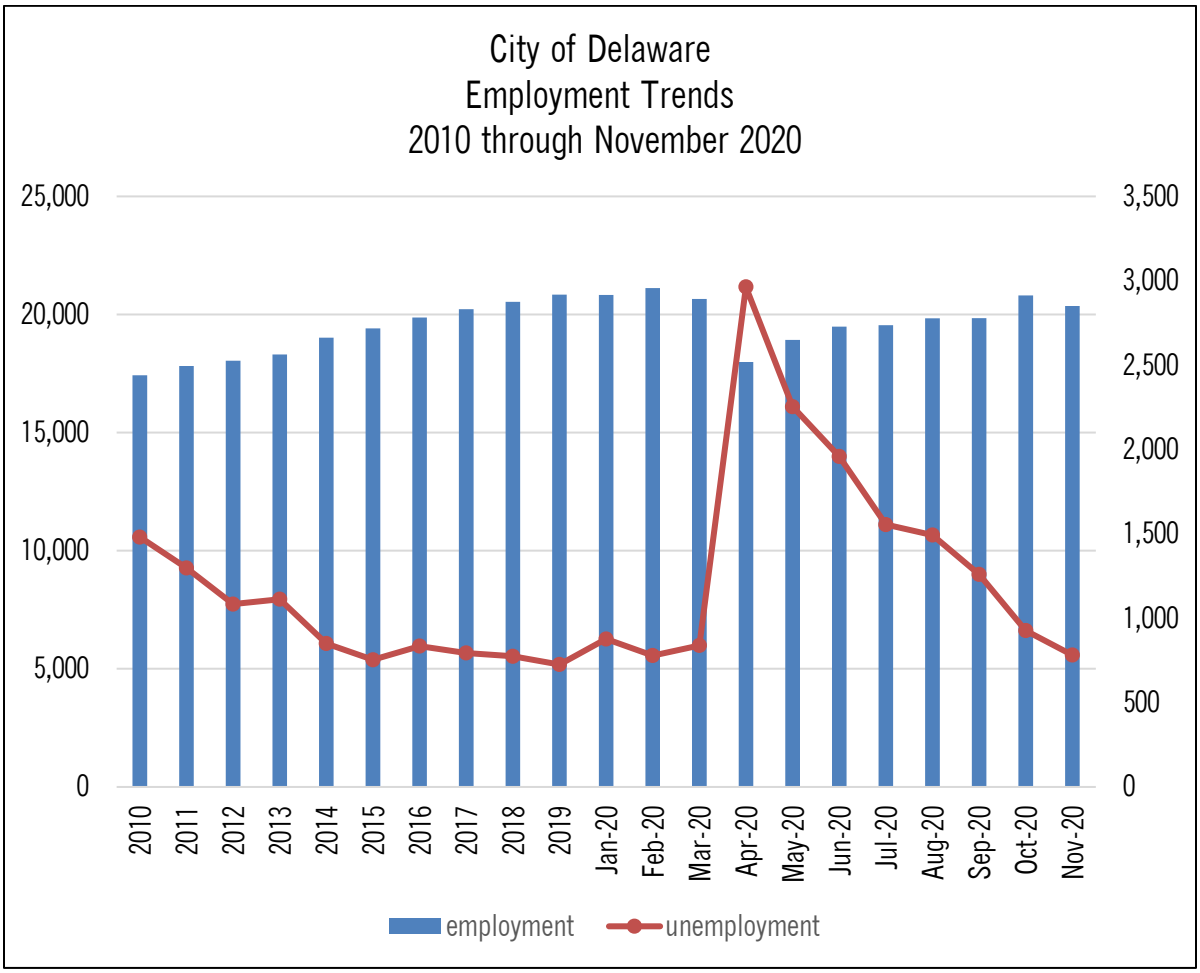
Description	Employment		Projected Change in Employment	
	2016 Annual	2026 Projected	2016-2026	Percent
TOTAL	**1,087,154**	**1,185,594**	**98,440**	**9.1%**
Goods Producing	**118,937**	**120,595**	**1,658**	**1.4%**
Agriculture, Forestry, Fishing and Hunting	10,920	10,824	-96	-0.9%
Mining	793	837	44	5.5%
Construction	35,641	39,872	4,231	11.9%
Manufacturing	71,583	69,062	-2,521	-3.5%
Trade, Transportation, and Utilities	**193,965**	**203,520**	**9,555**	**4.9%**
Wholesale Trade	36,013	36,191	178	0.5%
Retail Trade	103,716	106,221	2,505	2.4%
Transportation and Warehousing	N/A	N/A	N/A	N/A
All Other Services	**1,223,523**	**1,380,506**	**156,983**	**12.8%**
Information	**15,725**	**15,028**	**-697**	-4.4%
Financial Activities	**78,961**	**85,755**	**6,794**	**8.6%**
Finance and Insurance	65,490	71,285	5,795	8.8%
Real Estate and Rental and Leasing	13,471	14,470	999	7.4%
Professional and Business Services	**170,141**	**188,911**	**18,770**	**11.0%**
Professional, Scientific, and Technical Services	58,332	61,936	3,604	6.2%
Management of Companies and Enterprises	36,326	43,185	6,859	18.9%
Administrative and Waste Services	75,483	83,790	8,307	11.0%
Education and Health Services	**227,692**	**274,627**	**46,935**	**20.6%**
Educational Services	80,142	89,941	9,799	12.2%
Health Care and Social Assistance	147,550	184,686	37,136	25.2%
Leisure and Hospitality	**104,791**	**110,144**	**5,353**	**5.1%**
Arts, Entertainment, and Recreation	14,130	15,209	1,079	7.6%
Accommodation and Food Services	90,661	94,935	4,274	4.7%
Other Services	**44,628**	**46,604**	**1,976**	**4.4%**

Note: The Columbus MSA includes the following counties: Delaware; Morrow; Union; Licking; Franklin; Madison; Pickaway; Fairfield; Perry and Hocking

Source: Ohio Department of Job and Family Services', *2026 Job Outlook, Columbus Metropolitan Statistical Area*

4. Resident Employment Trends

The following chart was generated from the U.S. Department of Labor's, Bureau of Labor Statistics. It reflects employment and unemployment trends for the City of Delaware, Ohio. Pre-COVID 19, unemployment rates were at or near all-time lows. Unemployment rates peaked in April 2020 at 14.1% and have continued to decline each month since to November's 3.7% rate. The total employment, as of November 2020, is approximately 150 persons lower than Pre-COVID 19.



Note: November 2020 employment data is preliminary.

Overall employment in Delaware County was impacted less with fewer service-related jobs. The November 2020 unemployment rate is at 3.7%. Employment bounced back faster in the City of Delaware than the overall MSA which sits at a 4.9% unemployment rate (preliminary November 2020).

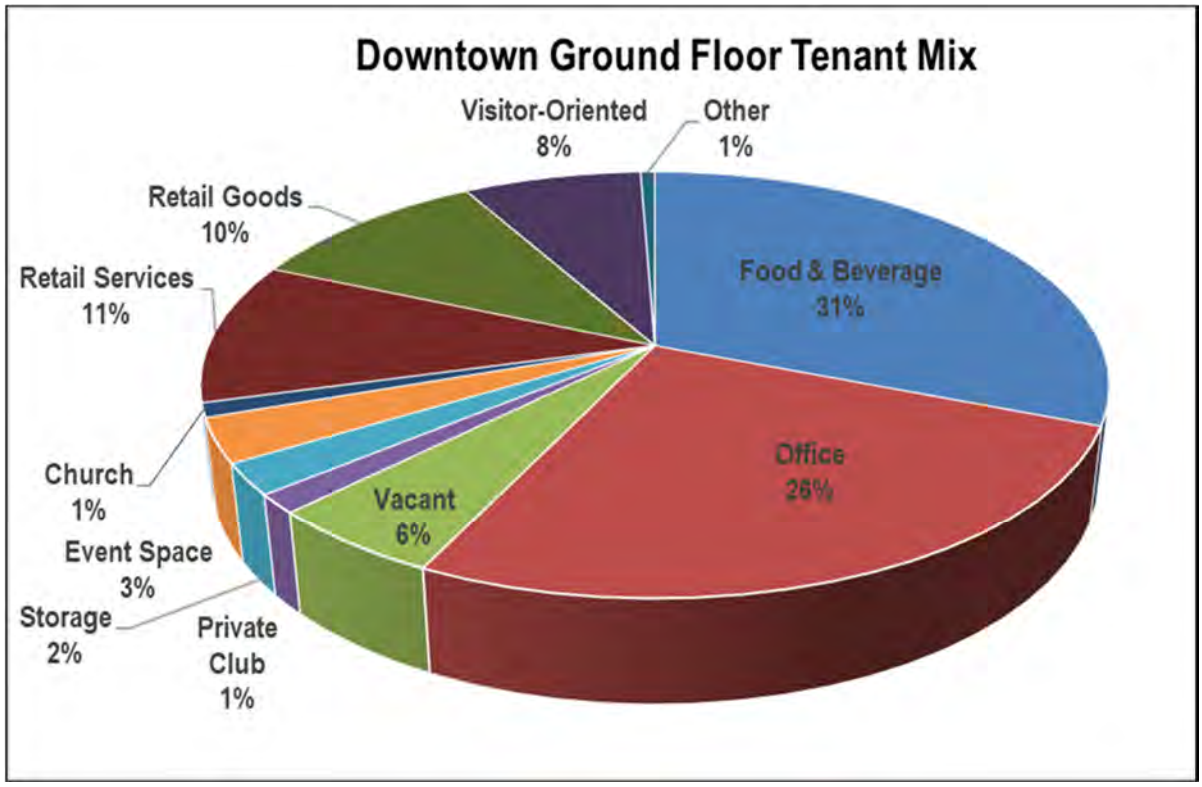
According to the U.S. Bureau of Labor Statistics, in terms of unemployment, the Leisure and Hospitality industry was the most impacted by COVID-19.

Downtown Tenant Mix

The market potential for additional housing and commercial space in Downtown Delaware is predicated on the variety and quality of commercial businesses within the downtown. The commercial environment is an important factor in providing a vibrant shopping and entertainment area, a unique lifestyle for persons to live downtown and a place for businesses to thrive.



Based on inventory data provide by the city, there is approximately 325,000 square feet of ground floor space in the core area of Downtown Delaware. Of this space, 31% are food and beverage businesses, followed by 26% office. A distribution of ground floor space in Downtown Delaware follows.



Downtown Commercial Environment Comparisons

DDA inventoried other medium-sized downtowns in Ohio to identify the typical mix of uses associated with downtowns in different stages of maturation. Based on this comparative assessment, Downtown Delaware has a vibrant mix of food and drink establishments and high occupancy. There is a high share of office users in ground floor spaces. Office workers bolster consumer spending in the downtown, however, such a high share of offices on ground floor spaces limits opportunities for space to be used for retailers, especially visitor-oriented establishments. A comparison of the Downtown Delaware mix of uses with the average share in a variety of commercial environments follows.

Quality Of	Average Share of Uses in Downtown Ground Floor Space by Quality of Environment					
Environment	Food & Drink	Vacant	Visitor-Oriented	Offices	Retail Goods/Services	Other Uses
Poor	10%	30%	0%	10%	10%	40%
Limited	15%	25%	3%	10%	14%	33%
Fair	25%	15%	5%	15%	20%	20%
Healthy	27%	10%	10%	20%	23%	10%
Vibrant	30%	5%	13%	20%	27%	5%
Delaware	*31%*	*6%*	*8%*	*26%*	*21%*	*8%*

Overall, it is DDA's opinion that the downtown area rates at a healthy-to-vibrant commercial environment. The introduction of additional visitor-oriented retail will immediately improve the downtown and attract more visitors, patrons and residents (see examples of visitor-oriented tenants below).

It is important to note that the downtown has a vibrant mix of restaurants in the downtown area. While there is additional support projected for restaurants in the City of Delaware over the next five years, we recommend limited placement of additional restaurants in the downtown. A disproportionately high share of restaurants can adversely impact other retailers as lease rates increase and there is a lack of new space for other resident and visitor-oriented uses.

Downtown Delaware has most of the common businesses found in other well-developed downtowns. A list of additional downtown ground floor visitor-oriented and retail goods/services tenants not in Downtown Delaware but present in other downtowns follows.

Tenant Types Not Located in Downtown Delaware

<u>Visitor-Oriented</u>

- Arcade bar
- Bicycle shop
- Candle shop
- Painting studio
- Vintage shop

<u>Retail Goods/Services</u>

- Bridal shop
- Drug store
- Jeweler
- Pet groomers
- Pet supplies

Drug stores in downtowns, notably, are those that have typically been in the market for decades.

Key Market Characteristics by Development Type

A market exists for a wide variety of development types throughout the City of Delaware. It is important that future (re)development include key site characteristics and complementary land uses to maximize marketability. A summary of key characteristics by development type follows.

Multifamily Rentals

Apartment development benefits from visibility to high volume traffic (at least 10,000 cars per day). A site with limited visibility will have difficulty in getting enough prospective renter traffic to sustain occupancy levels. The next generation of renters (Millennials) are attracted to mixed-use environments, especially housing that is within walking/biking distance to coffee shops, parks, brew pubs, restaurants and within a quick commute to work. Maximizing density of housing is important to contributing to the mixed-use environment.

For-Sale Housing

Homeowners are making a long-term commitment and the primary concern is having a home in an attractive environment and, for young family homeowners, highly rated schools. Most single-family subdivisions are surrounded by single-family homes and homeowners pay premiums to be adjacent to golf courses and other types of passive greenspace or wooded wetlands. There are successful examples of single-family master planned communities connected to common area amenities and even commercial town centers via walking paths. Based on DDA's online survey of other Ohio communities, the ability to walk to a park is viewed as one of the most positive proximate amenities.

Retail/Restaurants

Market exposure is essential to the success of retail/restaurants, including the high volume of vehicle traffic and in the case of downtown, also pedestrian traffic. Retailers generally want to be next to other retailers within the traffic pattern and/or view of an anchor store. Retail strip centers or small neighborhood retail development are the most vulnerable to changes in the marketplace.

Offices

There is a general lack of quality modern office alternatives, especially those larger than 5,000 square feet. While office users want "good" office space, it is more important to have nearby restaurants that can be quickly and easily accessed for their employees and clients. Grocery stores also are shopped regularly by office employees (source: ICSC).

Hotel

Hoteliers require sites with nearby traveler services, most notably multiple restaurants. Proximity to demand drivers such as businesses, visitor attractions and student population concentrations are also important considerations.

Industrial

Access to highways remains one of the most important supporting factors for industrial development. Heavy and medium manufacturers typically desire a location remote from population to avoid any future environmental conflicts. Users of industrial buildings with appreciable amounts of office space, like Flex space, have locational needs similar office users.

An optimal location for a market-supported development can maximize marketability of a development and enhance the marketability of surrounding uses and encourage future development.

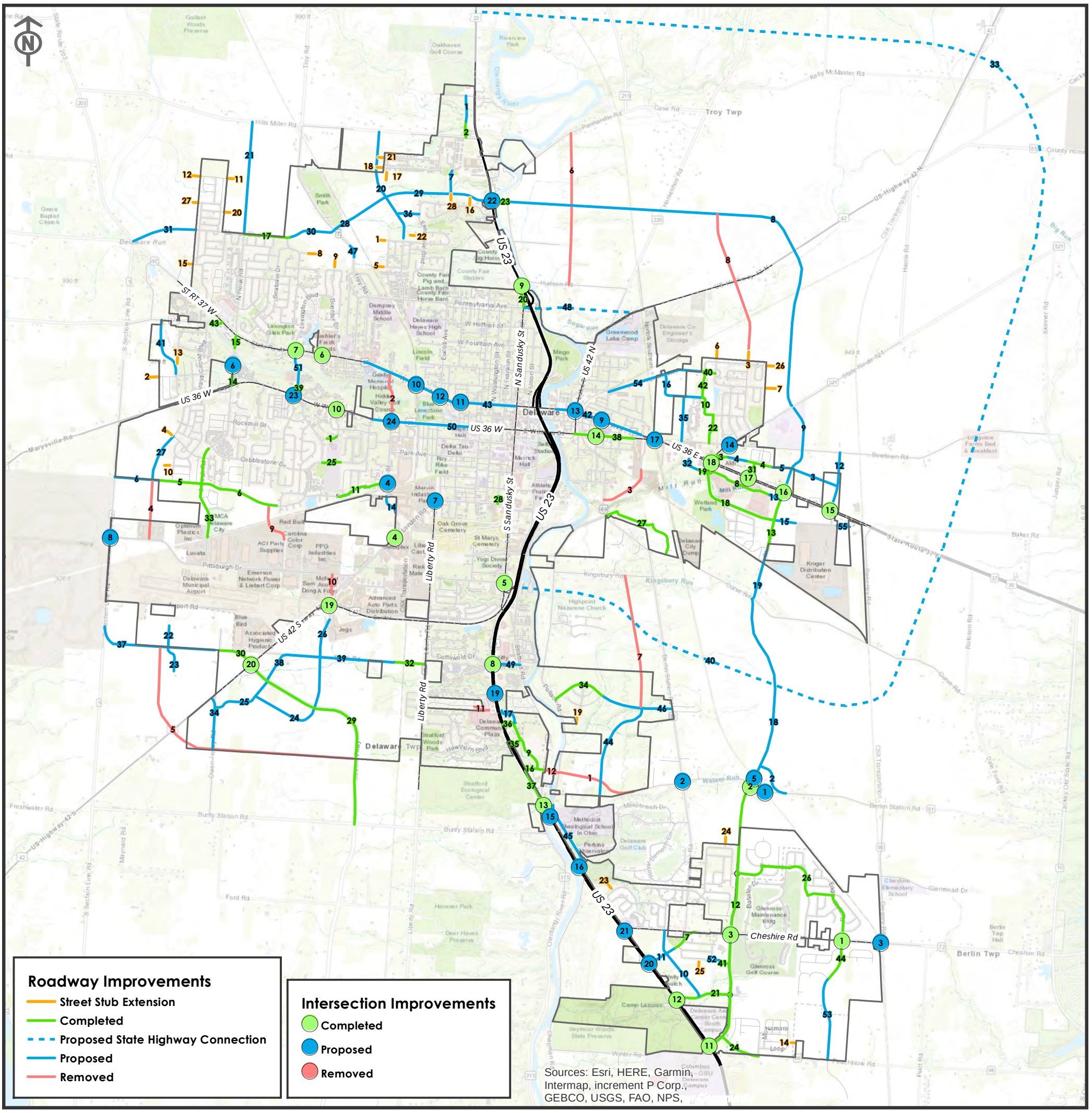
Conclusions

The results of DDA's real estate market assessment of the City of Delaware shows strong underlying market factors to support additional real estate development, including, but not limited to the following:

- Current low to moderate vacancy rates
- Lease rates supporting renovation/construction costs
- Significant household growth
- Low unemployment rates
- Increased resident spending power
- Sustainable sales/absorption rates

The city currently has limited office space and lodging, emphasized by the city's changing demographic/economic landscape. While COVID-19 has certainly contributed to a pause in the commercial development market, it is DDA's conclusion that the demand will continue to exist for these types of real estate beyond the pandemic. To facilitate office development, especially multi-tenant for lease space, the city likely will have to provide some financial incentives.

Market demand, in and of itself, is not enough for successful real estate development. Location plays a key role in the success of real estate development and the economic impact on the surrounding uses. Priorities for real estate development should revolve around existing assets, such as the vibrant downtown and other complementary uses (refer to page 7 for recommended priority development areas).



Roadway Improvements

Proposed:

1 Backage Road Extension
2 Berlin Station Road Relocation
3 Biltmore Drive Extension
4 Biltmore Drive Extension
5 Biltmore Drive Extension
6 Boulder Drive Extension
7 Bruce Road Extension
8 Byxbe Parkway Extension
9 Byxbe Parkway Extension
10 Cheshire Crossing Drive Extension
11 Cheshire Road Extension
12 Commercial Connector Road
13 Commercial Frontage Road
14 Curtis Street Realignment
15 Davidson Lane Extension
16 Ferguson Avenue Extension
17 Frontage Road Extension
18 Glenn Parkway Extension
19 Glenn Road Improvement
20 Heritage Blvd. Extension
21 Houk Road Extension to Hills Miller Rd.
22 Industrial Access Drive (North)
23 Industrial Access Drive (South)
24 Industrial Backage Road Construction
25 Industrial Backage Road Construction
26 Jegs Blvd. Extension
27 Lehner Woods Blvd. Extension
28 Merrick Blvd. CSX RR Crossing
29 Merrick Blvd. Extension
30 Merrick Blvd. Extension (Cambridge to Troy)
31 Merrick Blvd. Extension West to SR 203
32 Mill Run Loop Extension
33 Northeast US36/SR37/US23 Bypass
34 Owen Fraley Road Realignment
35 Residential Connector Street
36 Residential Connector Street
37 Sawmill Parkway Extension Phase G
38 Slack Road Realignment
39 Slack Road Reconstruction
40 Southeast US23/US42 to US36/37 Bypass
41 Springer Woods Blvd Extension
42 SR37 (E Central Avenue) Improvement
43 SR37 (W Central Ave. Reconstruction)
44 Stockdale Farms Drive
45 Stratford Road Extension
46 Terra Alta Drive Extension
47 Troy Road Realignment
48 US 42 to US 23 Connector
49 US23/Stratford Connector
50 US36 (W William Street Reconstruction)
51 Valleyside Drive Extension
52 Vista Ridge Drive Extension
53 Winterbourne Drive Extension
54 Vernon Avenue Reconstruction
55 Nutter Farm Lane Extension (East)

Street Stub Extensions:

1 Rutherford Ave Extension
2 Aaron Drive Extension
3 Ashburn Drive Extension
4 Benjamin Street Extension
5 Birchard Ave Extension
6 Brittany Drive Extension
7 Brittany Drive Extension
8 Broadview Chase Dr Extension
9 Buehler Dr. Extension
10 Burgoyne Street Extension
11 Connaught Place Extension
12 Connaught Place Extension
13 Curly Smart Circle Extension
14 Ensigns Lane Extension
15 Farmland Drive Extension
16 Hayloft Dr Extension
17 Hope Lane Extension
18 Kensington Dr Extension
19 Prato Road Extension
20 Silversmith Lane Extension
21 Sylvan Lane Extension
22 Taylor Ave Extension
23 Unnamed Street Extension
24 Unnamed Street Extension
25 Unnamed Street Extension
26 Wallace Drive Extension
27 White Elm Drive Extension
28 Woodhaul Dr Extension

Complete:

1 Applegate Lane Extension
2 Backage Road
3 Biltmore Drive Extension
4 Biltmore Drive Extension
5 Boulder Drive Extension
6 Boulder Drive Extension (S Houk to Firestone)
7 Cheshire Road Relocation
8 Commercial Frontage Road
9 Coughlan Lane Extension
10 Ferguson Ave Extension
11 Firestone Drive Extension
12 Glenn Parkway Extension
13 Glenn Road Improvement
14 Houk Road Improvment
15 Houk Road Realignment
16 Meeker Way Construction
17 Merrick Blvd. Extension
18 Mill Run Crossing Construction
19 Mill Run Loop Extension
20 N Sandusky Street Extension
21 Ohio Health Blvd.
22 Old Colony Drive Extension
23 Panhandle Road Bridge Replacement
24 Peachblow Road Realignment
25 Penick Avenue Extension
26 Residential Loop Connection
27 Rochedale Run/Randall Rd.
28 S Washington St Extension
29 Sawmill Parkway
30 Sawmill Parkway Extension Phase F
31 Sky View Lane Construction
32 Slack Road Reconstruction
33 South Houk Road Extension
34 Terra Alta Drive
35 US23/Hawthorn Blvd. Intersection & Extension
36 US23/Penny Way Improvement
37 US23/SR315/Stratford Rd Intersection Improvement
38 US36 (E William) Widening
39 Valleyside Drive Extension
40 Vernon Avenue Extension
41 Vista Ridge Drive Extension
42 Wallace Drive Extension
43 Warrensburg/SR 37 Intersection
44 Winterbourne Drive

Removed:

1 Braumiller Road Realignment
2 Curtis Street Extension
3 East Point Crossing Extension
4 Industrial Connector Street
5 Industrial Loop Road
6 Neighborhood Collector Street
7 Neighborhood Collector Street
8 Neighborhood Collector Street
9 Neighborhood Connector Street
10 Pittsburgh Drive Connector
11 Pollyanna Drive Extension
12 Stratford-Pollock Road Connection

Intersection Improvements

Proposed:

1 Berlin Station Road Railway Crossing Removal
2 Braumiller/Berlin Station Intersection
3 Cheshire Road/CSX Crossing
4 Curtis St/Firestone Drive Intersection
5 Glenn Parkway Railroad Grade Separation
6 Houk Road/Greenlawn Drive Turn Lane
7 London Road/Liberty Road Intersection
8 Pittsburgh Drive/Section Line Road Intersection
9 SR37/Channing Street Intersection Improvement
10 SR37/CSX RR Bridge Clearance Improvement
11 SR37/Elizabeth Intersection Improvement
12 SR37/Euclid Ave. Intersection Improvement
13 SR37/US42 (Central/Lake) Intersection
14 SR521/Bowtown Intersection Modification
15 Stratford Road/US23 Intersection modification
16 Stratford/US23 Intersection
17 The Point Improvement
19 US 23/Hull Drive Intersection Modification
20 US23/Cheshire Road Intersection
21 US23/Cheshire Road Intersection Modification
22 US23/Merrick/Panhandle Intersection
23 US36/Carson Farms/Valleyside Dr. Signalization
24 US36/Curtis Street Intersection Improvement
25 US42/Owen Fraley Rd. Intersection Improvement

Complete:

1 Cheshire Road/Winterbourne Intersection
2 Glenn Parkway/Berlin Station Intersection
3 Glenn Parkway/Cheshire Road
4 London Road/Curtis Street Intersection
5 Sandusky/Belle Intersection Signalization
6 SR 37 (Central Ave.)
7 SR 37/Lexington Blvd. Intersection Signal
8 US 23/Cottswold Drive Intersection Modification
9 US 23/N Sandusky Intersection
10 US 36/Delaware Crossing Intersection
11 US23/Glenn Road/Winter Rd Intersection
12 US23/Ohio Health Blvd. Intersection
13 US23/SR315/Stratford Rd Intersection Improvement
14 US36/Cheshire Street Signal
15 US36/Davidson Lane Intersection
16 US36/Glenn Road Intersection Improvement
17 US36/Glenwood Commons Intersection
18 US36/SR521 Intersection Improvement
19 US42/Jegs Blvd. Intersection
20 US42/Sawmill Parkway Intersection

EST 1808 CITY OF DELAWARE OHIO

City of Delaware, Ohio 2020-2040 Thoroughfare Plan Project Summary

Adopted by City Ordinance: 21 – XX'
XX-XX-2021

Last Updated: 02/22/2021

SUMMARIES OF OTHER RELEVANT PLANS

Insight2050 (2015)

In 2014, the Mid-Ohio Regional Planning Commission (MORPC), Columbus 2020, and the Urban Land Institute (ULI) Columbus retained the services of Calthorpe Associates to project future growth in the region over the next 30+ years and to help communities proactively plan for it. In 2015, the insight2050 initiative projected in its initial report that the region would grow by 25% (1 million people) by 2050. The report included scenarios for development and an assessment of how each would impact a range of fiscal, transportation, environmental, public health, and other metrics. More information can be found at www.getinsight2050.org.

Trail System Master Plan, Delaware County (2017)

The Delaware County Trail System Master Plan was created to honor each community's strategic goals and plans while striving for a cohesive and consistent system for the enjoyment of all. The plan recognized the unique nature of Delaware County with its many features, as well as all of the large number of local jurisdictions. The plan promoted healthy communities, greenways and trails, and parks and open spaces.

Bicycle and Pedestrian Master Plan 2027 (2017)

The plan had a 10 year planning timeline and the process included an assessment of existing conditions, a public engagement and visioning process, and recommendations to implement the vision. The plan recommends $14 million in projects to be implemented over the next 10 years.

City Branding (2014) & Wayfinding Plan (2015)

In 2014, the City of Delaware conducted a rebranding effort to help support city-wide communications during a period of growth. The Guide Studio helped the City translate its personality and voice appropriately to the community. City characteristics that were identified were family-oriented, cooperative community, small business core and authentic experiences. In addition to a new logo, the consultants helped create wayfinding, traditional badges and communication templates. A citywide Wayfinding Plan was completed in 2015. A specific Industrial Park Signage Plan was completed in 2018. A Park Wayfinding & Signage Package was completed in 2017.

Building Industry Association of Central Ohio Housing Need Assessment (2018)

Based on Insight2050 projections, the BIA's report concluded that Central Ohio may not be able to accommodate the expected number of new households without major changes. Further, current housing production is only providing a small share of needed new housing. This report concluded that the Columbus MSA and the 10 counties within are projected to gain a million more people from the significant number of jobs expected to be generated through year 2050. There will be a corresponding need for additional housing units to accommodate and realize this job growth.

Access Delaware (2018)

Access Delaware was a research and engagement effort to gain insight from the community about transportation challenges facing the City of Delaware. Additionally, this process aimed to get public opinion on why the "Moving Delaware Forward" levy did not pass. The process used key influence interviews, community forums, and online surveys to hear public input. The process found that residents drive to get around town, roads need work, Delaware can be challenging to drive in, and the levy failed because residents felt overtaxed and it was not well communicated. Recommendations were made as part of the Access Delaware initiative to support the City's case for transportation needs, communicate best practices, and build trust and understanding. The Access Delaware process continues to better plan for current and future transportation needs and to communicate progress to the community.

MORPC Corridors Study (2019)

The Corridor Concepts Study Report was developed from findings in insight2050 focusing on new tools and modeling capacity to guide decisions about where and how to grow, where to invest transit resources and how to balance community goals. The report measured the impact of varying approaches of planning to address expected growth. Additionally, the report set an implementation framework and identified strategies on how the region can advance transit development to best serve the community.

The report includes five corridors selected for their range of growth opportunities, these included the following: East Main Street (SR 256 to Downtown Columbus), Northeast (Polaris Parkway to Downtown Columbus), Northwest (US 33 at Post Rd./Frantz Rd. to Downtown Columbus), Southeast (Rickenbacker International Airport to Downtown Columbus), West Broad Street (Norton Rd. To Downtown Columbus).

MORPC Housing Strategy (2019)

The Mid-Ohio Regional Planning Commission conducted a Regional Housing Strategy that concluded in Summer 2020. It aimed to support a coordinated housing strategy for the region, including investment and policy recommendations to support mixed income neighborhoods and regional growth. The study reviews existing studies, recommends investment priorities, identifies gaps in funding streams, identifies structural impediments and sets forth metrics for individual communities and the region. The work was led by MORPC with a consultant team.

U.S. Route 23 Corridor Strategic Guide (2020)

The U.S. Route 23 Corridor Strategic Guide was a corridor study focusing on Route 23 with the goal of supporting growth throughout Delaware County. The study objectives are to create a shared vision, identify critical infrastructure improvements, craft scenarios and recommend actionable strategies.

Parks and Recreation Needs Assessment (2020)

The City of Delaware and consultant team conducted a Parks and Recreation Needs Assessment that identified existing inventory, market analysis, cost of deliverables, opportunities, and future needs.

CITY OF
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Appendix

APPENDIX

The following plans, studies and public engagement documentation have helped to inform the Comprehensive Plan.

KEY PLANS, STUDIES AND PUBLIC ENGAGEMENT DOCUMENTATION

1. Focus on the Future Public Engagement Summary (November 2018)
2. Economic Baseline Assessment, Delaware Together (March 2019)
3. Southwest Industrial Area Opportunities Assessment, Delaware Together (January 2020)
4. Residential Market Analysis, Delaware Together (January 2020)
5. Fiscal Efficiency Evaluation, Delaware Together (May 2020)
6. Real Estate Market Assessment, City of Delaware (January 2021)
7. Draft Thoroughfare Plan (March 2021)
8. Summaries of Other Selected Relevant Plans

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MEMO

To:	Dave Efland, Director of Planning & Community Development	November 7, 2018
From:	Sarah Kelly and Emily Long, planning NEXT	
Re:	Round 1 of Public Engagement, Delaware Together, Comprehensive Plan	
cc:	Delaware Together Steering Committee	

This memorandum summarizes the first round of public engagement for the City of Delaware including:

- a Citizen's Academy workshop (5/24)
- input gathered at a Delaware Together Steering Committee meeting (7/16)
- a staffed First Friday booth with an interactive activity (9/7)
- a staffed Delaware County Fair booth with an interactive activity (9/15)
- five Focus on the Future workshops held on four evenings (9/13, 9/25, 9/26, 9/27)
- online public input (9/13 – 10/21)
- a self-directed YMCA booth (approx. 10/12 – 10/23)
- a self-directed Mingo Park booth (approx. 10/12 – 10/23)

The memo includes the following:

1. Purpose
2. Approach
    a. Greatest Opportunities
    b. Mapping Exercise
3. Who participated

1. Purpose

The City of Delaware launched a comprehensive planning process in early 2018 called Delaware Together. One of the key inputs to the process is insight from the community. Through the first round of public engagement, multiple opportunities were designed to provide the platform for anyone who cares about the future of Delaware to help shape the plan's recommendations. The engagement lays the groundwork for development of the plan's goals, objectives and recommendations. While distinct comments are useful, seeing where comments share themes or are similar is where the community can come together around core ideas, ideals, and ultimately actionable results. The measure of input can be made in terms of shared comments and ideas together with unique thoughts and challenges.

> *"Loved hearing what others shared and having a dialogue about the possibilities/opportunities"*

2. Approach

Delaware Together's first round of public engagement included face-to-face opportunities to provide input through the City's Citizen's Academy, the Delaware Together Steering Committee and five public workshops held at multiple locations in the City. Opportunities for online engagement through a web-based survey and mapping tool were also designed and broadly promoted. Interactive displays were used to gather input at First Friday and the Delaware County Fair (staffed booths) as well as at the YMCA and Mingo Park (self-directed). Most of the engagement opportunities included two components: Greatest Opportunities input and a Mapping Exercise. In part 1, Greatest Opportunities, participants were asked to answer the question, ***"What are the greatest opportunities for the Delaware community?"*** Through part 2, the mapping activity, participants were asked to identify strong and weak places in the city associated with specific geographic locations, and to explain why they were strong or weak.

This section summarizes input collected. It draws from a database of every comment recorded (in participants' own words) and is organized around themes and sub-topics.

Greatest Opportunities

The following section includes the most prevalent themes and sub-topics shared in response to the question, "What are the greatest opportunities for the Delaware Community?" It includes overarching themes followed by prevalent sub-topics and specific objectives.

1. **Infrastructure, Walkability and Connectivity** *(145 comments)*
    a. Transportation
        i. Create better connection to surrounding cities
        ii. Expand public transportation
    b. Traffic/congestion
        i. Reroute large trucks to reduce congestion
    c. Parking
        i. Provide better opportunities for convenient parking, especially downtown
    d. Bike infrastructure/paths
        i. Connect and expand current paths
2. **Identity, Character and Community** *(98)*
    a. Art
        i. Improve art scene through public art, forming an arts council, calendar, district, etc.
    b. Historic Value
        i. Maintain and preserve historic buildings/districts
        ii. Promote Delaware's history

c. Aesthetics
    i. Improve landscaping, welcome signs, gateways to city
d. Sense of community
    i. Conduct outreach such as providing a welcome packet for new residents
    ii. Promote multiculturalism
    iii. Improve East-West and North-South Social Connections

3. **Growth, Revitalization and Targeted Areas** *(89)*
    a. River development
        i. Create a river walk
        ii. Improve access
        iii. Promote development
    b. Revitalization
        i. Improve the South Sandusky corridor (e.g. street redevelopment)
        ii. Improve The Point (e.g. alleviate traffic congestion)
        iii. Improve the East side area
4. **Economics, Employment and Tourism** *(89)*
    a. Economic development
        i. Develop the industrial and tech sectors
        ii. Expand technology to attract business (create corridors, consider fiber network)
    b. Expansion of businesses
        i. Support small and family-owned businesses and restaurants
5. **Sustainability, Environment and Parks and Recreation** *(74)*
    a. Parks and green spaces
        i. Expand current parks
        ii. Add and improve bike trails
        iii. Create greenways
    b. Environmental sustainability
        i. Plant more trees
        ii. Make recycling available monthly for paint, batteries, etc.
6. **Downtown** *(66)*
    a. Parking
        i. Address lack of parking
    b. Continuation of positive momentum
        i. Consider new grocery store and/or other places for residents to shop for necessities

7. **Housing** *(49)*
    a. Housing options
        i. Promote more housing options
        ii. Build more affordable housing
    b. Historic character
        i. Preserve historic homes
8. **University and Education** *(45)*
    a. Ohio Wesleyan
        i. Strengthen partnership to leverage workforce, community dialogue, and continuous education opportunities
    b. School system
        i. Maintain and improve Delaware and Olentangy school systems
9. **Health & Safety** *(26)*
    a. Wellness
        i. Enhance food access (especially, Second Ward)
    b. Safety
        i. Address concerns about crime and drugs (especially Second Ward)
10. **Accessibility and Proximity** *(19)*
    a. Connections
        i. Improve connection to Columbus and Central Ohio suburbs
11. **Social Services** *(18)*
    a. Enhance coordination and communication of services
    b. Support the homeless population and those with drug addiction
12. **Communication and Management** *(8)*
    a. Local news
        i. Increase opportunities for sharing local news and information
13. **Other** *(66)*
    a. "Smart" related topics *(8)*
        i. Be a smart and sustainable city (smart growth in fast growing region)
    b. Vacancy *(7)*
        i. Address vacant lots and buildings
    c. Diversification *(7)*
        i. Encourage socioeconomic diversity
    d. Workforce Development (7)
        i. Sustain and engage the workforce
    e. Wi-Fi *(4)*
        i. Enhance access to public and free Wi-Fi

Mapping Exercise

Below is the summary of the mapping exercise performed and its 471 comments at the Focus on the Future workshops and online survey. Identified and described are some of the top strong and weak places in Delaware, followed by some of the most prevalent comments made about each about why the place was identified. Additional places are identified in the attached map. (See Appendix A, strong/weak places summary map).

1. **Strong**
    a. Downtown *(46)*
        i. People want to visit this vibrant location for its restaurants, shops, walkability, art, culture, and history
        ii. Evokes a sense of community, identity, and belonging
        iii. Includes negative comments in relation to parking
    b. Ohio Wesleyan *(25)*
        i. Beauty and character of the university
        ii. Opportunities that the university brings such as culture, diversity, students, and continuous partnerships with an educational center
    c. Mingo Park *(23)*
        i. Green space, trails, activities, and access to Olentangy River amenities
    d. YMCA *(14)*
        i. Strong community spaces with great amenities such as a splash pad, bike trails
        ii. Facilitates health, community, and a family atmosphere.
    e. Stratford Ecological Center *(11)*
        i. Sustainable, unique location with great greenspace and many educational opportunities, especially for children

2. **Weak**
    a. Corridors *(82)*
        i. Lake Street *(21)*
            - Blight, poverty, vacant buildings, drug use, and visually unappealing
            - Opportunity for redevelopment
        ii. South Sandusky Street (*12*)
            - Run down
        iii. Central Avenue *(8)*
            - Traffic and congestion
    b. The Point *(37)*
        i. Traffic and congestion
        ii. Blight, lack of security, noise pollution, and the need for maintenance
    c. Delaware Square Shopping Center *(15)*
        i. Run down, an eyesore, and not well maintained
        ii. Vacancies
        iii. Inaccessibility to the shopping center without a car

d. East Side *(12)*
    i. Run down
    ii. Empty, vacant buildings and homes
    iii. Lack of connections to the rest of the City
e. Industrial *(9)*
    i. Liberty and London industrial area is rundown and in need of redevelopment

3. Who Participated

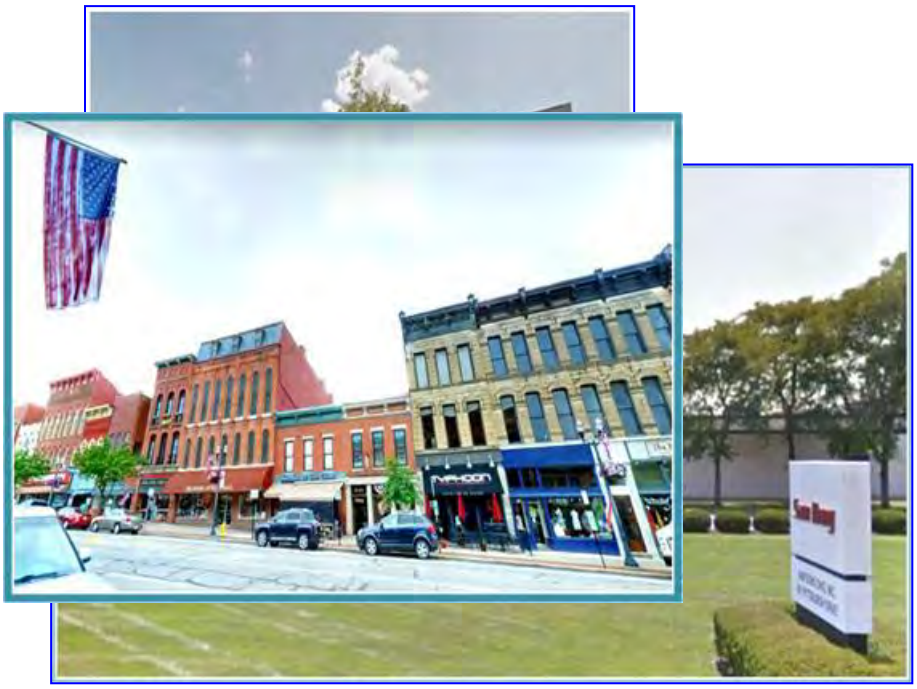
Participants who attended the public workshops filled out an exit questionnaire about their experience and themselves. Of those who participated, 67% completed the exit questionnaire. Additionally, those who engaged online answered a few key questions. (See Appendix B, Exit Questionnaire Results.) The following insight is based on responses:

Key Takeaways

- 1,312 unique comments were collected
- Email and word of mouth were the most popular ways people heard about the Focus on the Future Workshops.
- 100% of participants said they felt comfortable working within the small groups, and 100% felt that their input was heard.
- 99% of participants said they will stay involved with the planning process for Delaware Together.
- Participants closely matched the demographics represented in the City of Delaware with respect to race, gender, ethnicity, etc.
- All four wards were well-represented
- There was age diversity among participants, with over-representation within the age cohorts of 15-24 and over 55.
- Those with a higher education and higher annual household income were overrepresented relative to the City's population.
- Participants varied with respect to amount of time they have lived in the City and included long-time residents as well as those who have recently moved.

Delaware Together

Economic Baseline Assessment



March 2019
Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

This report presents findings on the city of Delaware's economic and demographic base as an input to broader economic development and city-wide planning, especially future land use planning. The Baseline Assessment provides regional context, along with an overview of local demographic and economic trends. The local economic base is examined, in terms of key assets, commutation patterns, employment trends, economic drivers, and industries. The Southwest Industrial Area is a particular focus of this assessment, with a review of existing conditions in the area and discussion of its competitive advantages as a location for economic activity. Finally, initial baseline analysis is also provided of the city's housing, in terms of existing housing conditions and market trends as a basis for further analysis of the city's housing demand and market potentials. Findings from the Housing Market Analysis will be presented at a later date in a separate report.

Section 1. DEMOGRAPHIC OVERVIEW

This section provides a review of Delaware's demographic trends within the regional context. Trends in population, households and income were examined along with other indicators, including education levels, that are particularly relevant to the city's economic growth and development. (Note: Where "Delaware" is referenced throughout this report, it refers to the city of Delaware; when referring to the county, "Delaware County" is used.)

Regional Context

Delaware is part of the Columbus, Ohio Metropolitan Statistical Area (MSA), a growing region with a diverse economic base. Delaware is the northern-most large node within the MSA and therefore dominates the labor market in a relatively broad area, fanning out to the north and west.



The seven-county Columbus MSA had an estimated population of 2,078,725 in 2017, based on Census estimates derived from the American Community Survey (ACS). A large share of the region's population is still concentrated in Columbus and Franklin County, although suburban counties are growing. The MSA population is up by 9.3% since the last Census in 2010 and is now ranked 32nd among all metro areas in the United States. Delaware is also part of the Columbus Combined Statistical Area (CSA), a larger trade area that includes nearby metro and "micropolitan" areas. The CSA had a 2017 estimated population of 2,481,585, according to ACS data, making it the 24th largest CSA in the U.S. It

should be noted that there are fewer Census-designated CSAs than there are MSAs.

Demographic Trends

The city of Delaware, the county, and the region have all grown fairly rapidly over the past 17 years. Between 2000 and 2010, Delaware city's population expanded by nearly 10,000 or nearly 38% (3.8% per year). While the city has continued to grow through 2017, the rate of growth has fallen to about 1.9% per year and is more aligned with regional trends. Delaware County saw 5.8% annual population growth between 2000 and 2010, among the fastest in the region. The County's population growth rate has fallen to 2.2% per year since 2010. Overall, the Columbus MSA has seen steady growth averaging 1.4% per year (2000 to 2010) and more recently, 1.2% per year. Population growth rates have fallen nationally since 2010, due in large measure to a decrease in the population among those of child-bearing age.

Households

Households have increased at a slower rate than population as a whole, suggesting that growth in household size contributed to the region's rapid growth. Household growth averaged 3.9% in Delaware between 2000 and 2010, but has fallen below 1.0% since then and is nearly aligned with the region's growth rate of 0.8%. Delaware County still sees a slightly higher household growth rate of 1.7% per year. In general, household formation has slowed in the region, again as an indicator of age demographics. Slowing household growth will gradually impact on demand for housing as well as on the market for retail goods and services within the region.

Household Income

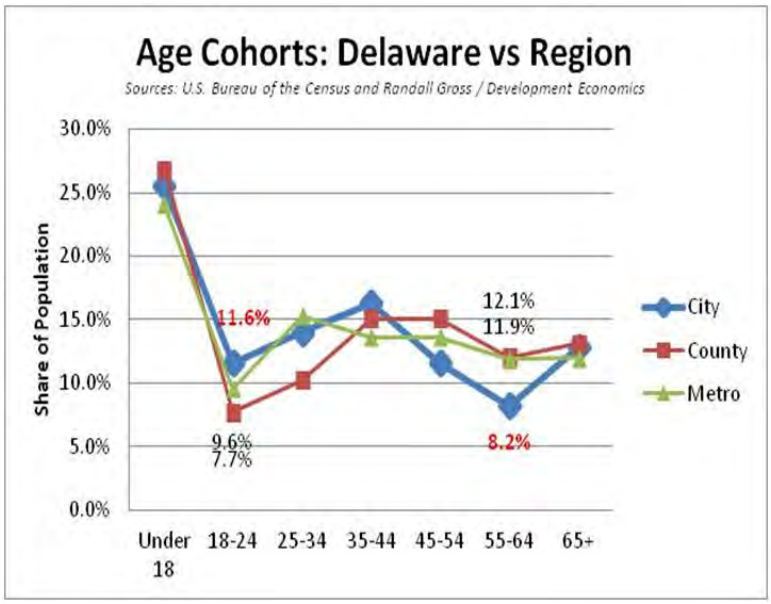
Income has surged in the city of Delaware since the most recent (2008-2009) recession, especially when compared to the region as a whole. Between 2000 and 2010, Household incomes in Delaware fell on average by 0.4% per year to just over $61,000 (in constant 2016 dollars, after adjusting for inflation). Delaware's incomes were therefore significantly lower than those in Delaware County but higher than those in the Columbus MSA as a whole. The global financial crisis and subsequent recession had a significant impact on Delaware's household incomes. By 2016, Delaware city's household incomes had rebounded to nearly $71,000, a very healthy increase of 2.2% per year in real (constant 2016) dollar terms. Incomes throughout the county have also increased since 2010, but not as fast as in the city of Delaware. Meanwhile, regional household income has stagnated and even fallen in real terms by 0.2% per year since 2010. Thus, households in Delaware city and county are seeing increasing incomes in comparison to the region as a whole.

Table 1.	KEY DEMOGRAPHIC TRENDS, DELAWARE, 2000-2015/16				
				Annual Change	
Factor	**2000**	**2010**	**2016/17**	**2000-10**	**2010-17**
Population	**25,243**	**34,753**	**39,363**	**3.8%**	**1.9%**
County	109,989	174,214	200,464	5.8%	2.2%
Metro	1,612,694	1,836,536	1,995,004	1.4%	1.2%
Households	**9,560**	**13,253**	**14,076**	**3.9%**	**0.9%**
County	39,674	62,760	70,224	5.8%	1.7%
Metro	610,757	723,572	764,973	1.8%	0.8%
HH Income	**$ 64,020**	**$ 61,238**	**$ 70,641**	**-0.4%**	**2.2%**
County	$ 93,544	$ 96,534	$ 106,933	0.3%	1.5%
Metro	N/A	$ 58,102	$ 57,440	N/A	-0.2%
Notes:	Census estimates 2016 for County/Metro, 2015 for City. Income is expressed in constant 2016 dollars.				
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Other Demographic & Social Characteristics

Delaware generally has a younger population than the region as a whole.

Chart 1



The city has younger wage earners and a smaller share of baby boomers, which helps explain why incomes are lower in the city of Delaware than in other parts of Delaware County. Younger workers have not reached their peak wage-earning years, so household incomes are lower than in older populations.

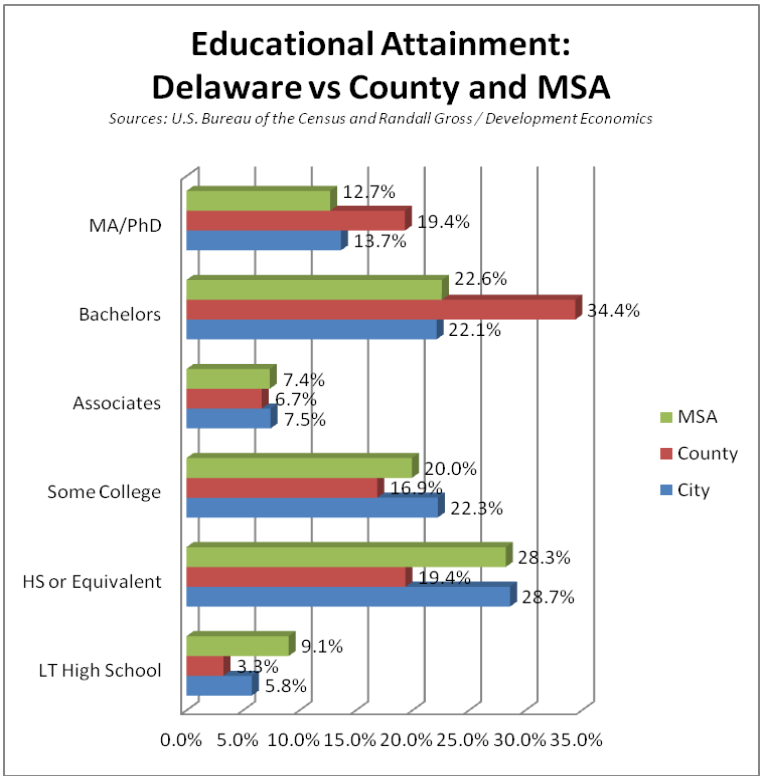
Ethnic & Language Diversity

The community's population base is less ethnically-diverse than the region's as a whole, with 91% of residents describing themselves as white compared with 77% region-wide. About 3.6% of Delaware's population is foreign-born, compared with 7.3% in the region as a whole. Spanish speakers represent a smaller share of Delaware's population than in other parts of the Columbus region.

Education Levels

About 43.3% of Delaware adults have achieved a college degree or higher. This number is slightly higher than that for the region as a whole (42.7%), but lags far behind Delaware County's average (60.5%). Meanwhile, more of the city's residents have less than a high school education than do Delaware County residents, but the metro area has an even higher share lacking a high school diploma. Educational attainment is an important factor in economic development.

Chart 2



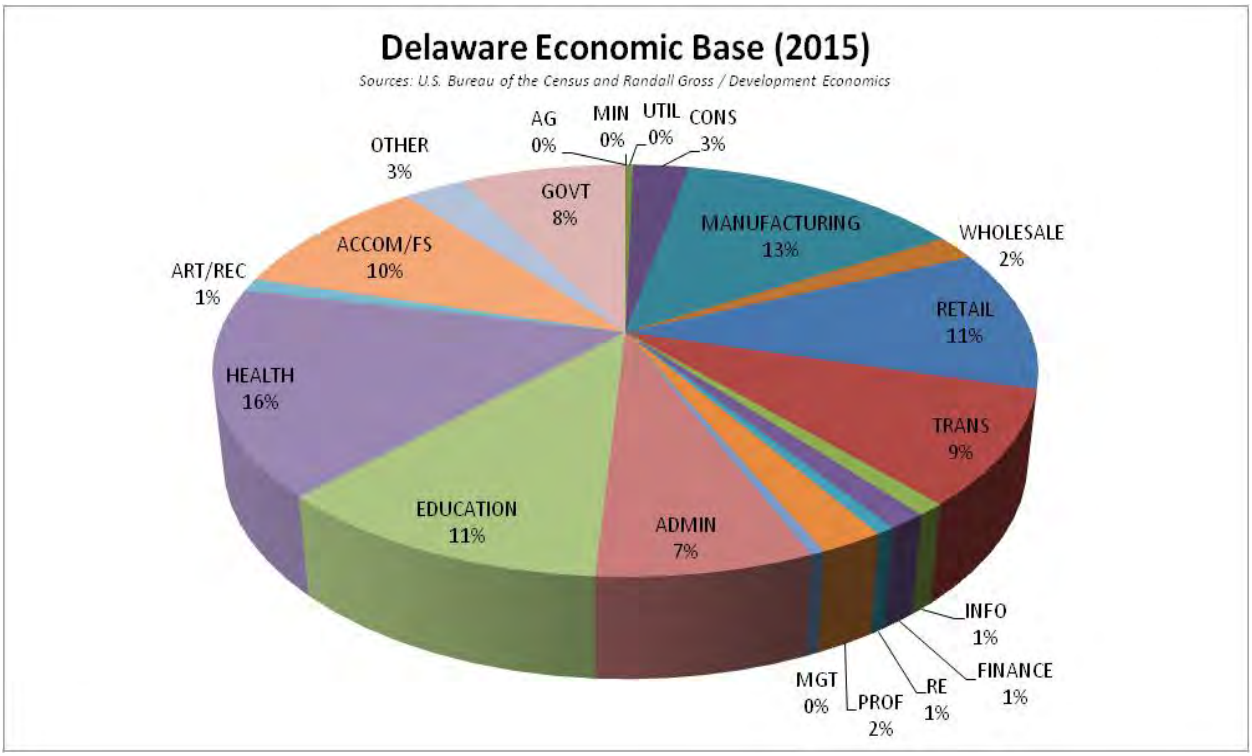
Section 2. ECONOMIC BASE & EMPLOYMENT TRENDS

The city's overall economic base was analyzed and key characteristics of the local economy are described herein. Major employers, trends in employment and other indicators are discussed. Delaware's relative positioning within the regional economy is described, focusing on key sectors within the economy. This information lays the groundwork for further analysis of Delaware's competitive advantage and key strengths for attracting and retaining industry.

Industry Sectors & Large Employers

Delaware benefits from a relatively diverse economic base. As illustrated below, no one sector dominates the local economy.

Chart 2



Key Industries include manufacturing, health care, education, retail trade, tourism (accommodation & foodservice), transportation, and administrative services Some industry sectors are less-represented, such as professional and technical services (2%), finance (3%), arts & recreation (3%), information services (1%), real estate (1%), and management services (<1%).

The city's largest private employers also illustrate the diversity of economic activity present in Delaware. The city's largest private employer is Ohio Health,

with about 1,500 employed in hospital and ancillary functions. The Kroger Distribution Center employs 1,100 while Ohio Wesleyan University has a total faculty and staff complement of about 600. Other large employers include such manufacturing concerns as PPG Industries, Sam Dong, and Vertiv (which conducts research & development activity in Delaware). Jegs Automotive has about 250 employees at its headquarters and administrative offices in the city.

• Ohio Health	1,500	Health Care
• Kroger Dist Center	1,100	Logistics
• Ohio Wesleyan	600	Education
• Advance Auto Distribution	400	Logistics
• Vertiv	350	R&D
• PPG Industries	330	Paint Mfg
• Domtar/AHP	300	Mfg: Hygienic Prods
• Jegs Automotive	250	HQ/Admin
• Liberty Castings	230	Foundry
• International Paper	175	Mfg: Cardboard Prods
• MW Acoust-a-Fiber	150	Mfg: Acoustic Prods
• Sam Dong	100	Mfg: Copper Prods

Employment Trends

Delaware had a total of about 14,900 jobs, based on Economic Census surveys completed in 2015. This number represents an increase of 3,200 (22.6%) since 2002 and 1,400 (10.4%) since the end of the recession in 2010. Despite the impact of the national recession, Delaware still gained 2,000 net jobs between 2002 and 2010. Growth sectors include health care, administrative services, transportation, accommodation & foodservice, retail trade, education, and others. There has been consistent growth throughout the 2002-2015 period in just three sectors: Administrative services (+660), accommodation (+590) and retail trade (+350). There were also three sectors that experienced a consistent (albeit small) decrease in employment: Finance & insurance (-60), professional & technical services (-50), and real estate (-25).

Several sectors impacted by the recession have rebounded since 2010. Among the most interesting of these is manufacturing, which had dominated Delaware's economy in decades past. Surprisingly, Delaware's manufacturing sector lost only a handful of jobs during the 2002-2010 period, counter to national trends indicting a major shift away from manufacturing that accelerated during the last recession. Despite a major gain in transportation jobs leading up to 2010, the sector lost a significant number of those jobs since that year. The gain in transportation and warehousing services prior to 2010 may relate to the opening of the Kroger Distribution Center during that period. It is not clear why some of those jobs have been lost in more recent years. Employment trends by specific industry sector are summarized in the table on the following page.

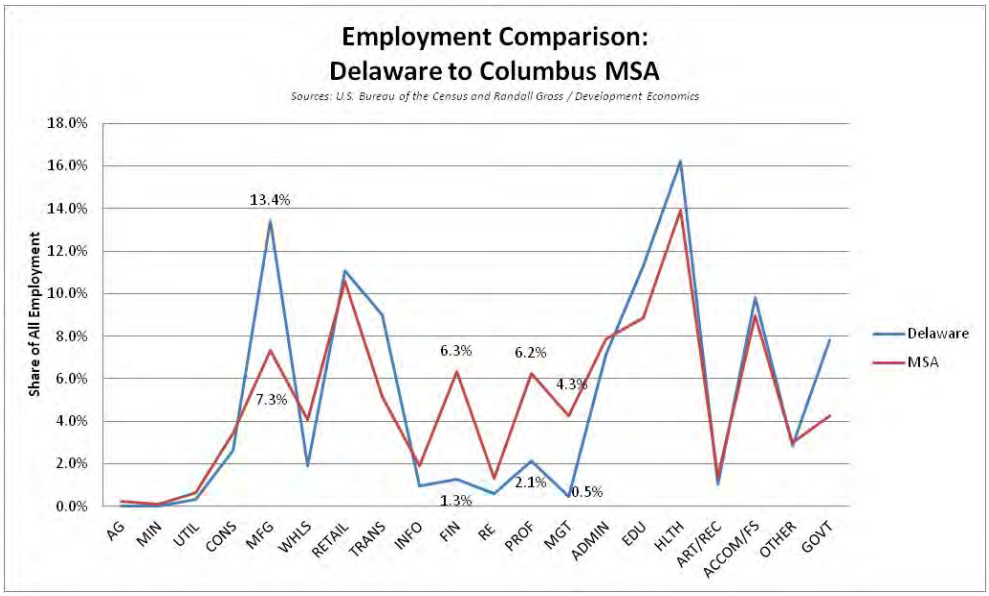
Table 2. AT-PLACE EMPLOYMENT TRENDS, DELAWARE, 2002-2015					
				2002-2015 Change	
Industry	2002	2010	2015	Number	Percent
Ag/Forestry	4	3	-	(4)	-100.0%
Mining	1	-	3	2	200.0%
Utilities	48	39	50	2	4.2%
Construction	397	212	390	(7)	-1.8%
Manufacturing	1,963	1,923	2,000	37	1.9%
Wholesale	267	308	287	20	7.5%
Retail	1,301	1,546	1,647	346	26.6%
Transportation	732	1,731	1,337	605	82.7%
Information	105	69	142	37	35.2%
Finance	248	209	192	(56)	-22.6%
Real Estate	116	113	91	(25)	-21.6%
Prof/Tech Services	361	423	316	(45)	-12.5%
Management	61	70	70	9	14.8%
Admin	410	804	1,065	655	159.8%
Education	1,494	744	1,681	187	12.5%
Health	1,714	2,506	2,419	705	41.1%
Arts/Ent/Recreation	152	140	153	1	0.7%
Accom/Foodservice	875	1,108	1,462	587	67.1%
Other	247	286	426	179	72.5%
Government	1,032	1,250	1,162	130	12.6%
TOTAL	**11,528**	**13,484**	**14,893**	**3,365**	**22.6%**
2010-2015				*1,409*	*10.4%*
Sources:	U.S. Bureau of the Census and Randall Gross / Development Economics.				

Delaware's Position in the Region

As shown on the following chart, Delaware remains relatively "heavy" on manufacturing employment as compared with the Columbus MSA as a whole. Nearly 14% of the city's employment base is in manufacturing, compared with just about one-half of that share at the regional level. At the same time, Delaware is relatively "light" on FIRE (finance, insurance and real estate), professional & technical, and management service (corporate office & related service) jobs as compared with the region. Only about 1.3% of Delaware's employment base is in finance, while that sector represents six times as much of the regional economic base. Similarly, only 2.1% of Delaware's jobs are in professional & technical services, versus more than 6% regionally. Finally, only 0.5% of Delaware employment is in management services, versus more than 4% at the regional level. The jobs for which Delaware has a smaller share (finance, professional &

technical, management) tend to be "brain-intensive" ones that require higher levels of education

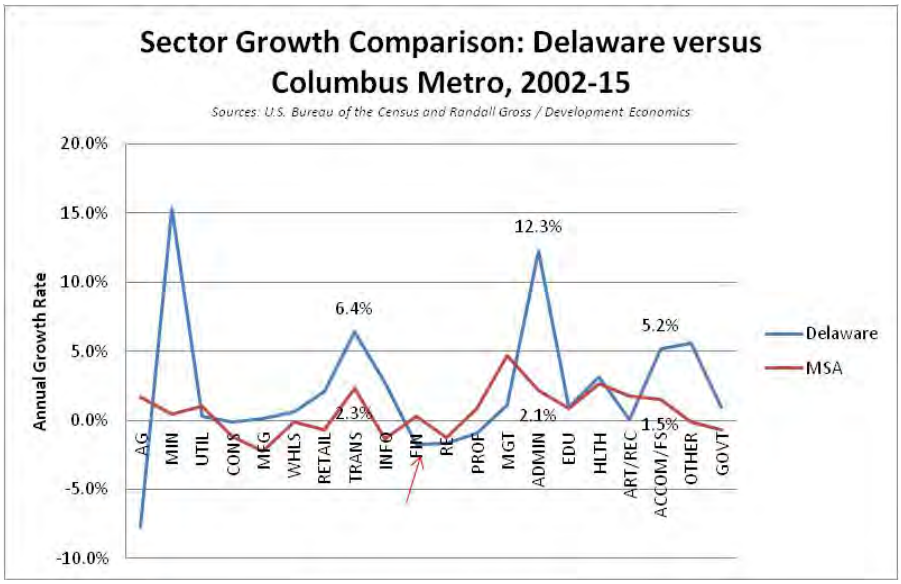
Chart 3



Growth Comparison

Delaware's industrial sectors were also compared against the region overall with respect to the rate of employment growth between 2002 and 2015.

Chart 4



This analysis suggests that Delaware's growth has exceeded the region's in several sectors including administrative services (e.g., "back office"), accommodation & foodservice (tourism-related), transportation, and (to a lesser

extent) several others including retail and wholesale trade, information services, manufacturing and construction. Delaware's mining (which includes quarries and other extraction services) employment growth far exceeded regional averages, but the numbers are so small that even a marginal increase seems large by comparison.

Where Delaware lagged regional trends in employment was again in FIRE, real estate, professional & technical, and management services; as well as in arts & recreation services. Slow growth in these sectors, particularly in professional and technical services, reinforces the city's limited positioning vis-à-vis these sectors.

Economic Drivers and Assets

The city of Delaware benefits from several key economic drivers as well as from its many assets and characteristics that help to anchor the community. Several of these assets and drivers are summarized below.

Location & Proximity

Delaware is located within the Columbus Metro Area, which is a large and growing MSA in a region that has otherwise seen stagnant or declining economic trends. Columbus's mix of state government, university research, and Fortune 500 companies along with its central location has helped stabilize and boost the Columbus economy in comparison to most of its Midwestern counterparts.

Delaware also has access to Polaris, Dublin and the Columbus central business district, all of which are major corporate hubs. Honda's assembly plant in Marysville is also proximate to Delaware, helping to provide diverse job opportunities for the city's residents. Assets like Delaware's Municipal Airport also serve to enhance Delaware's private transportation access.

Institutions

In addition to being part of the region that is home to the 3rd largest undergraduate university enrollment in the nation, Delaware itself has several institutions of higher education that serve to benefit the local economy. Ohio Wesleyan University, with enrollment of 1,600 students, is an important institution in the city and adds significantly to Delaware's cultural and academic life. Also located in Delaware is the Methodist Theological School in Ohio.

Heritage

Downtown Delaware offers a traditional Victorian-era downtown with a walk-able shopping experience and unique, independent shops. This heritage is an important part of Delaware's identity and serves as the core for residents' sense of place. Downtown Delaware has an active Main Street organization focused both on historic preservation and small business support, and has a locally-designated Historic Overlay, as well as aNational Register District downtown (Sandusky Street Historic District), all of which guide enhancing the existing physical appearance and appropriate new construction. In addition to the historic architecture, the city also offers historic venues such as the Strand Theatre and has served the nation as home to a U.S. President (Rutherford B Hayes) and one of America's most-beloved directors (Vincente Minnelli). Vintage businesses like The Hamburger Inn Diner add a local flavor to the city's offerings. Recent branding efforts undertaken by the City have also helped to build on the city's heritage as a foundation for growth.

Strong Business Base & Entrepreneurial Sector

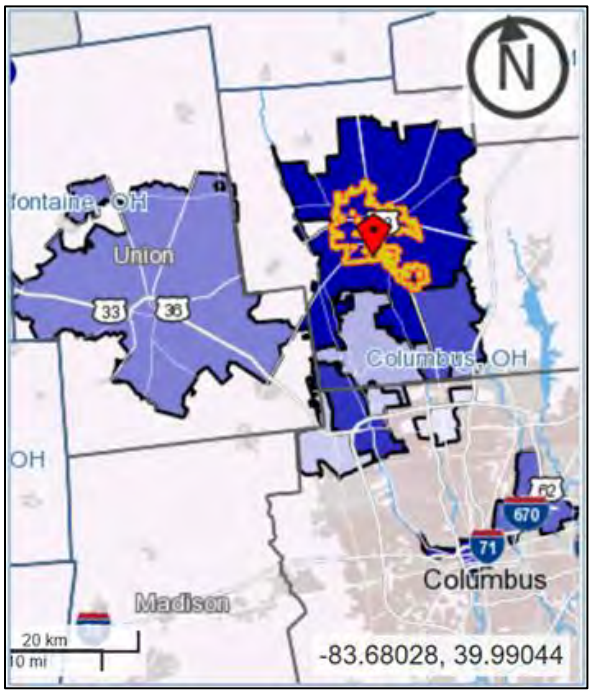
Delaware's economy is anchored by regional and global brands including Ohio Health, Kroger, Advance Auto, Jegs, International Paper, PPG, Vertiv and others. But in addition to these brands, the city has a healthy collection of local and unique specialty businesses along with an entrepreneurial sector that helps strengthen the city's overall economic base.

Section 3. DELAWARE LABOR MARKET & COMMUTATION PATTERNS

Given Delaware's location within the Columbus MSA, it is important to understand the labor market and commutation patterns, particularly the correlation between resident and at-place employment. Resident employment represents the jobs held by residents, regardless of the location of those jobs. At-place employment refers to the jobs located within the city of Delaware, regardless of where those workers live. Ideally, as many Delaware residents as possible who wish to work in Delaware would be able to do so. Not only would such balance contribute to residents' quality of life (through reduced time spent in traffic) but would also enhance local fiscal health, with the City retaining more of the income tax generated within Delaware.

Delaware Resident Commutation

Based on Census employment and commutation data, approximately 80% of working Delaware residents commute out of the city for their employment. Meanwhile nearly 80% of Delaware's at-place workers commute in to the city from other places. Only about 20% of the jobs in Delaware are held by Delaware residents. The top zip codes attracting Delaware residents for work include 43015 (22%), 43215 (5%), 43017 (4%), 43035 (3%), 43219 (3%), and 43040 (3%). The top ten zip codes for Delaware residents' jobs are illustrated below.



Map showing the ten zip codes capturing the highest number of Delaware residents for jobs in the region. These zip codes include several in Columbus, northern Franklin County, and Marysville; in addition to those in Delaware and southern Delaware County. (Darker shades indicate higher numbers of jobs)

Aside from Delaware, many of the city's residents are generally working in the city of Columbus (30%) and southern Delaware County, as well as in auto-related jobs in Marysville. The top zip codes for Delaware workers are the following:

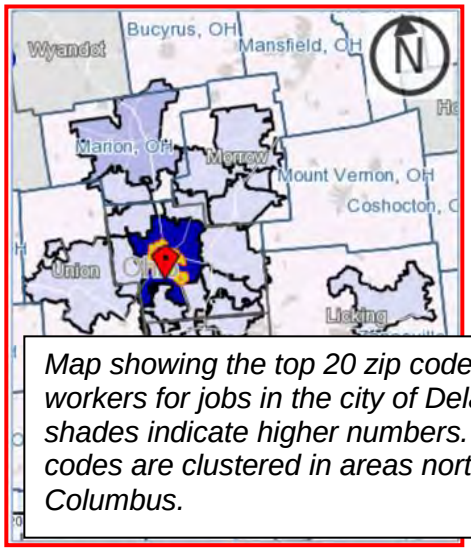
1. 43015: 22% (Delaware)
2. 43215: 5% (Columbus)
3. 43017 4% (Dublin)
4. 43035 3% (Polaris)
5. 43219 3% (Columbus)
6. 43040 3% (Marysville)
7. 43240 3% (Sunbury)

Remaining jobs for Delaware residents are distributed throughout the Columbus metropolitan area and beyond.

Delaware Labor Market Commuter-Shed

Workers holding jobs in Delaware originate throughout the region as well. In general, about one-third commute ten miles or less to work in Delaware. Another third commutes ten to 25 miles and the final third commutes more than 25 miles to work in Delaware. Workers originate primarily from these zip codes:

1. 43015: 27% (Delaware)
2. 43302: 6% (Marion)
3. 43065: 3% (Powell)
4. 43040: 2% (Marysville)
5. 43035: 2% (Lewis Center)
6. 43003: 2% (Ashley)
7. 43074: 2% (Sunbury)



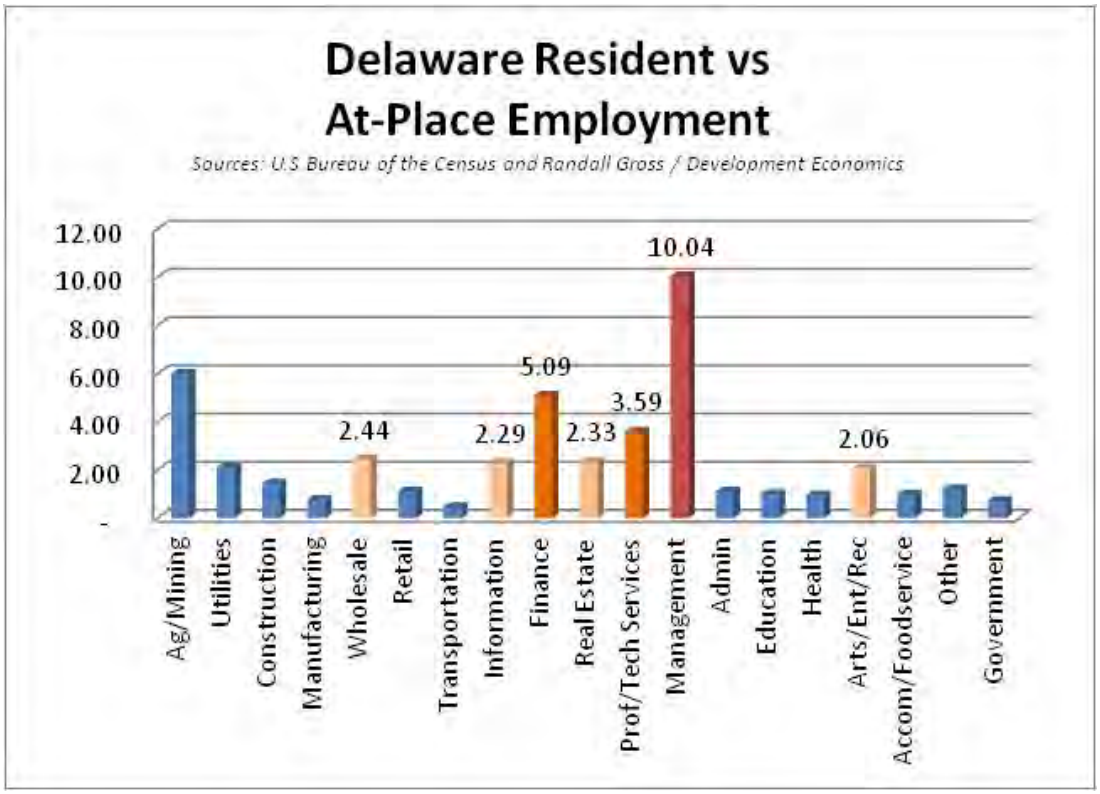
Map showing the top 20 zip code sources of workers for jobs in the city of Delaware. Darker shades indicate higher numbers. The top zip codes are clustered in areas north of the city of Columbus.

As indicated on this list and as illustrated on the map at left, Delaware's employers draw from a labor market area that includes Delaware and Franklin counties but also extends to the north and west to capture areas outside of the Columbus MSA. This labor market contrasts with the commuter-shed for Delaware residents, which extends primarily to the south and east.

The Labor Market Imbalance

As noted above, the commutation data suggest that 80% of Delaware residents are commuting out to jobs in Columbus and Delaware County while 80% of Delaware's workers are commuting in northern suburban but also from rural communities to the north-west. This imbalance is even more apparent when examining the ratio of residents to jobs in specific industry sectors, as illustrated below.

Chart 5



The chart shows that there are more than *ten times* as many management service professional workers residing in Delaware than there are management service jobs in the city. While less pronounced, the imbalance is also apparent within the FIRE (5x), professional & technical service (4x), and other sectors including wholesale trade, information service, real estate, and arts & recreation. The sectors closest to having an equal number of resident workers and jobs include manufacturing, transportation, government, accommodation & foodservice, health care, education, and administration services. Ultimately, if the city were to reduce the imbalance in resident versus at-place jobs, there would be a focus on attracting or growing more local jobs in management, professional & technical services, finance, arts & recreation, and a handful of other sectors.

Labor Market Growth Trends

Delaware's labor market is growing, which helps to provide a ready supply of workers to support local business growth. Within the existing commuter-shed from which a majority of Delaware workers are drawn, there is a population base of about 518,100. The base has increased by 35,300 or 7.3% since 2010, signaling positive growth in the labor market.

Table 3. POPULATION TRENDS, DELAWARE COMMUTERSHED, 2010-2016

Zip Code	2010	2016	Change 2010-2016 Number	Change 2010-2016 Percent
43015	2,788	2,875	87	3.1%
43302	47,907	52,834	4,927	10.3%
43065	36,621	40,449	3,828	10.5%
43040	55,874	60,290	4,416	7.9%
43035	23,746	26,421	2,675	11.3%
43003	31,484	33,103	1,619	5.1%
43074	3,734	4,265	531	14.2%
43061	38,148	40,957	2,809	7.4%
43082	12,106	12,386	280	2.3%
43081	55,447	58,780	3,333	6.0%
43315	29,361	31,821	2,460	8.4%
43235	44,477	50,964	6,487	14.6%
43229	38,667	42,314	3,647	9.4%
43017	54,950	53,632	(1,318)	-2.4%
43026	7,521	6,999	(522)	-6.9%
Sub-Total	**482,831**	**518,090**	**35,259**	**7.3%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

There has been relatively consistent growth in this market, with the exception of two zip codes that lost population since 2010: 43017 (Dublin) and 43026 (Hilliard). Growth was fastest in 43235 (north Franklin County), 43074 (eastern Delaware County), 43035 (south Delaware County), 43065 (Powell), and 43302 (Marion). The largest population base is in 43040, and the largest number added to the population base was in 43235 (north Franklin).

Section 3. EXISTING REAL ESTATE CONDITIONS

This section provides an overview of existing real estate conditions in Delaware, placed within the regional market context. An assessment of industrial, office, retail, and residential markets was conducted to describe inventory, occupancy, construction, rents and sale prices, construction and absorption, among other indicators. Perspective on Delaware's role in the regional market is provided where relevant.

Industrial

Existing market conditions in industrial real estate were examined for Delaware and the broader regional market and sub-market of which it is a part. Key findings are summarized below.

Columbus Area Market

Columbus is a large and growing distribution hub for the Midwest and beyond. Because of its central location, multiple branches of the interstate highway system, and marketing of Rickenbacker Inland Port. Based on data collected through Colliers, the Columbus market has a total of 236.4 million square feet of leasable space in larger buildings. About 3.9% (9.2 million square feet) is vacant. While about 4.2 million square feet of industrial space is under construction, area brokers and developers indicate that investment is suppressed due to the inability to capitalize assets that have benefited from successive tax abatements. Average industrial rents range from $2.56 to $6.34 per square foot.

The **North Delaware (County) Sub-Market** contains about 9.05 million square feet of industrial space, comprising less than 1.0% of the regional industrial market. The area has a 3.45% vacancy rate (312,200 square feet). There is very little speculative industrial space under construction. Rents range from $3.45 to $6.60 on average, slightly higher than the regional averages.

Local Delaware Market

As noted earlier, Delaware has a significant industrial and R&D presence, including major facilities for EMS, PPG, Liberty Castings, Midwest AF, and others. Such single-owner-occupied and purpose-built facilities are generally not included in the inventory data generated by brokers. Much of this space is geared for manufacturing, warehousing, and, to a lesser extent, research & development and laboratory use.

Within Delaware, it is estimated that there are about 1.8 million square feet of industrial space, based on available inventory data coupled with employment

factors. There is limited vacancy, estimated at 3.3% (mainly in Symmetry Industrial Park), which is consistent with sub-market and market-wide data. Rents are averaging $2.00 to $3.50 Net for larger spaces and $5.00 to $6.60 Net for smaller spaces (of 10,000 square feet or less).

Delaware's strengths for industrial real estate include the proximity of a local airport to industrial areas and of Marysville (as an automotive production hub); and to Columbus (as a market and distribution hub). The geographically large labor market area, which extends north and west of Delaware, provides a growing labor supply for manufacturing and distribution. Finally, there is available, serviced industrial land to accommodate industrial development in the area.

Among the local market's challenges is the city's lack of direct access to the interstate highway system, which impedes distribution market development. There is currently a lack of available building space to accommodate growing or relocating businesses. Finally, Delaware is not located directly proximate to major research drivers, like OSU, conducting basic research, although they are located within the same region.

Office

Again, Delaware's office market was examined within the context of the regional market. That market is much more concentrated within specific corporate nodes, although "consumer-oriented" office use such as real estate, insurance, and banking offices are located throughout the region to serve the local markets.

Columbus Area Market

The Columbus market is driven by corporate and administrative services. Downtown has headquarters for major multi-national businesses like Nationwide and others that occupy their own single-tenant buildings. But there is also 65.5 million square feet of leasable office space (in inventoried buildings over 5,000 square feet) throughout the region. Vacancy is about 9.26% (6.06 million square feet) which, although trending lower is still fairly high compared with several comparable markets. The Columbus area also has about 1.3 million square feet of leasable office space under construction. Rents are averaging $18.76 per square foot, market-wide.

The Polaris Sub-Market, which is the only designated office market within Delaware County, contains a total of about 4.6 million square feet. As such, Polaris constitutes about 7.0% of the region's office market. At 5.37% (246,000 square feet), vacancy is much lower in Polaris (which includes more new space) than in the market as a whole. There is very little under construction, which is surprising given that Polaris rents are 112% of the regional average, at $20.97 per square foot (according to Colliers data).

Local Delaware Market

Delaware does not have any large office nodes, per se, although there is office space in the downtown area and within the city's commercial corridors. Downtown Delaware has an estimated 106,000 square feet of office space (based on inventory data supplied by the City), of which 60% is in ground floor spaces. The concentration of office in ground-floor commercial spaces is higher than would normally be recommended in a downtown area, where an objective is to activate the streets through more consumer-oriented uses like retail, restaurants and audience support venues.

Downtown Delaware vacancy is estimated at 12%, although that number includes some upper-floor spaces that have not yet been updated to current standards). There is a very limited inventory of large floor-plate and mixed-use buildings offering office space. Rents in Delaware are averaging $14 per square foot for 1st-floor spaces and $10 to $12 per foot (modified gross) for upper-floor spaces. Areas south towards Polaris can yield rents in the $15 to $18 per-foot range.

Based on discussions with brokers and others, it is estimated that about 60% to 70% of Delaware's office tenants originate from within Delaware County. Key drivers include Ohio Health (and other health care providers); professional services (law firms (Delaware is the County Seat) and accounting firms); security, information and other technology firms; home-based businesses; and Ohio Wesleyan (Delaware Entrepreneurial Center).

The city's strengths for office uses include its affordability as well as its proximity to a large metropolitan area. Delaware offers a small town, friendly atmosphere without the stress of being Downtown or stuck in Polaris traffic. Drawbacks include the lack of purpose-built office space to accommodate users along with the lack of large, non-health care drivers.

Retail

Existing retail conditions were assessed primarily within Delaware County and the city of Delaware specifically. Polaris represents the major retail and mixed-use node in the county and therefore draws consumers and competes with retail within the city of Delaware. At the same time, as a mixed-use hub, Polaris also draws consumers into the county that may not have otherwise come to Delaware.

Polaris

The Centers of Commerce concept for Polaris constitutes 1,200 acres of mixed-use development. Out of that original concept, there are still about 200 acres remaining for development. Polaris Fashion Place is the primary retail node within the area, an enclosed mall with 1.6 million square feet of retail space and 200 stores. The mall is anchored by major department store tenants including H&M, J C Penney, Macy's, Saks, and Sears; as well as Dick's Sporting Goods, Van Mauer and others. Meanwhile the larger Polaris node also includes "big box" stores and venues with destination draw, including Ikea, TopGolf, Cabela's and others. Overall, Polaris is one of the largest retail and mixed-use nodes in Ohio.

Downtown Delaware

Downtown Delaware has a total of about 190,000 square feet of retail/commercial use, based on the inventory provided by the City and on field reconnaissance. Retail, restaurant and entertainment uses constitute about 60% of the 310,000 total square footage of ground-floor commercial space in Downtown Delaware. As noted earlier, the percentage of retail uses in ground floor space should be maximized where possible.

Chart 6



Downtown retail use is heavily oriented to eating & drinking establishments, which constitute roughly 45% of the total inventory of retail use. Restaurants, bars, and entertainment venues are often part of the first wave of businesses that help to re-establish downtowns as destinations, particularly in the absence of the large department stores that once dominated downtown retail business. Delaware has succeeded in building its downtown restaurant scene but the remaining retail categories have not yet caught up. Shopper's goods stores, businesses offering

product for which consumers comparison shop, constitute just 27% of the retail mix. Ideally, shopper's goods should be closer to 45% while eating & drinking establishments at 25-30%.

Personal service establishments (e.g., hair salons, tailors, etc) comprise 11% of Downtown retail space. There is more space devoted to personal services than to convenience stores like groceries, florists, specialty food stores (e.g., bakeries) and other convenience businesses. Again, it would be ideal to have more convenience businesses downtown that can address the needs of households within the immediate area as well as workers and others who come downtown on a regular basis. About 6% of Downtown retail space is currently vacant, which is one sign of success in a downtown that once had much higher vacancy rates in the range of 40 to 50%. Even shopper center and mall operators hope to maintain 95% occupancy, which allows for some movement and changeover of tenants in the market. So, 94% occupancy is a healthy number for an older downtown without a central tenanting agency.

Downtown rents are averaging $14 to $17 per square foot, up from $8 per square foot in 2010. Downtown tenants include a number of local, independent, and start-up businesses; and the city is becoming an affordable destination for specialty businesses.

Commercial Corridors

Delaware's commercial corridors exhibit a broad range of conditions and rental structures. Older centers along Route 23 see rents in the $12 to $14 range per square foot, with anchor stores (Wal Mart, Kroger) paying rents starting at $10 per foot. Nutter Farm rents (Meijer) range from $14 to $15 per foot, while businesses in the Kroger Center (Route 36/37) pay rents in the $12 to $14 range. These rents compare with those in newer centers like Glenn Wood Commons, where rents approach $21 per square foot. This newer center is 70% leased to date. Otherwise, there is only limited available retail/commercial space in the city's corridors, such as the 12,000 square-foot former Metro Fitness location. There is some new construction (Coughlin's Crossing) which will add 200,000 square feet of much-needed competitive, new space to the market.

Residential

A Housing Market Analysis is being conducted as an input to the planning process. This analysis will provide a more complete review of market conditions as well as forecasts of housing market potential and strategies for housing development or rehabilitation in the city. Findings from an initial review of existing housing market conditions are provided below. The primary housing market area from which significant demand is drawn is defined to include all of Delaware County.

Delaware Neighborhoods & Market Drivers

Delaware has a number of distinct residential neighborhoods, built in successive waves throughout the city's history and offering a diversity of housing stock at varying prices. Several of these neighborhoods are described below based on field reconnaissance and input from area residential brokers.

- **Northwest Delaware**, the city's historic district, has spacious and attractive Victorian-era homes as well as smaller bungalows and cottages with diverse prices ranging from $60,000 up to the $600,000s. The neighborhood is attractive due to its historic housing stock and proximity to Downtown Delaware.

- **The East Side** has 1920's era housing stock ranging in price from $80,000 to $160,000 on average. Housing conditions in some areas are below average and neighborhoods could benefit from reinvestment.

- **The University District** adjoins the Ohio Wesleyan campus and its proximity is attractive for university faculty and staff. Homes range in price from $110,000 to $250,000 on average.

- **The West Side** offers newer subdivisions with homes in the $170,000 to $370,000 range.

- **The Marvin Lane Park / Delaware Meadows Area** has smaller, post-war (1950s) era homes in the $90,000 to $140,000 range. These neighborhoods are located near Delaware's southwest industrial area, where some of the residents have been employed. Like the East Side, some of the neighborhood housing stock and infrastructure could benefit from better maintenance or reinvestment.

- **The Southwest Side**, further out of the city, offers new homes in subdivisions like Carson Farms ($225,000 to $350,000 range) and others.

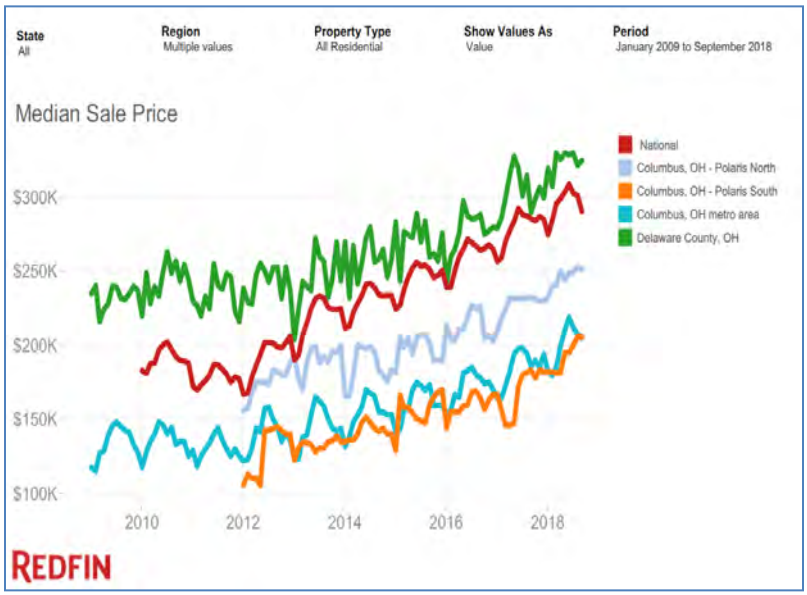
Brokers have observed that a desire to be located proximate to certain high-performing schools like Smith Elementary School, help drive the market for family housing. Some Millennial and Baby Boom generation buyers are seeking "less grass," as they purchase homes in more walk-able neighborhoods with maintenance-free housing.

Prices and Trends

As noted above, the primary housing market area includes all of Delaware County. Median Delaware County housing prices are $325,000, or about 59% higher than the MSA median of $205,000. However, Delaware County prices are

increasing at a slower pace than those in the metro area as a whole, with Delaware prices up by 35% since 2009 compared with 78% metro-wide. Delaware County housing prices have been increasing roughly in tandem with (but slightly higher than) the national housing market since 2013, according to data supplied by Redfin. The Columbus metro-wide market has lagged behind both the national and Delaware County median prices.

Chart 7

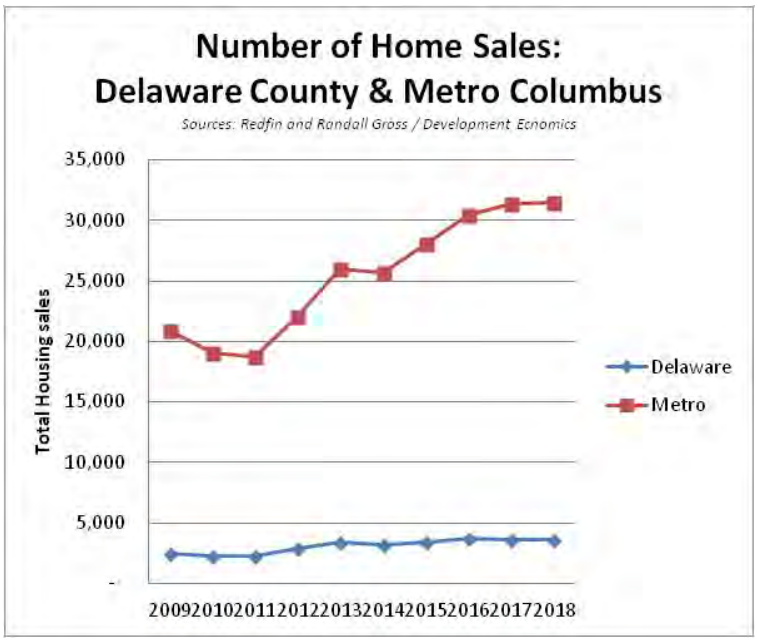


Rentals. Rents in Delaware's downtown area are averaging $14 per square foot for apartments. About 90% of the existing downtown apartments are occupied. Ideally, there would be a target of 95% occupancy in newer, centrally-managed apartment complexes. But 90% is a fairly healthy indicator of the downtown market, since many of these are upper-floor units in older buildings that are not centrally managed. More detailed information on for-sale and rental prices in the city of Delaware and countywide will be provided as input to the full Housing Market Analysis.

Sales Volumes

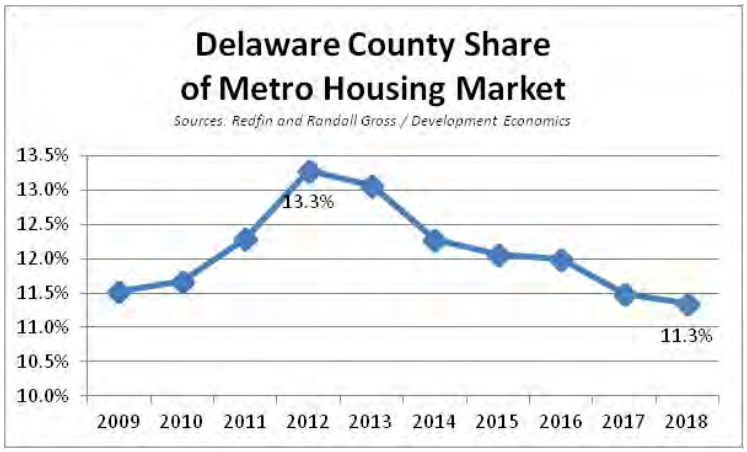
Delaware County has seen a more stable market than the metro Columbus area as a whole since 2009. The Columbus MSA has averaged about 25,400 sales per year since that date, with Delaware County comprising about 12% of that market (3,000 per year) on average. Overall home sales in Delaware County, compared with the Columbus Metro, are shown in the following chart, below. Again, Delaware County comprises the primary housing market area from which Delaware City derives much of its housing demand. More detailed information on sales within the city of Delaware will be provided as input to the full Housing Market Analysis.

Chart 8



Delaware County's share of regional sales volume peaked at 13.3% in 2012, but has fallen since that year to about 11.3% in 2018. As such, the county's share of the market has returned to its recession-era level. This is not to say that the county's sales volume has fallen over time, but only that its share of the regional volumes has returned to previous levels.

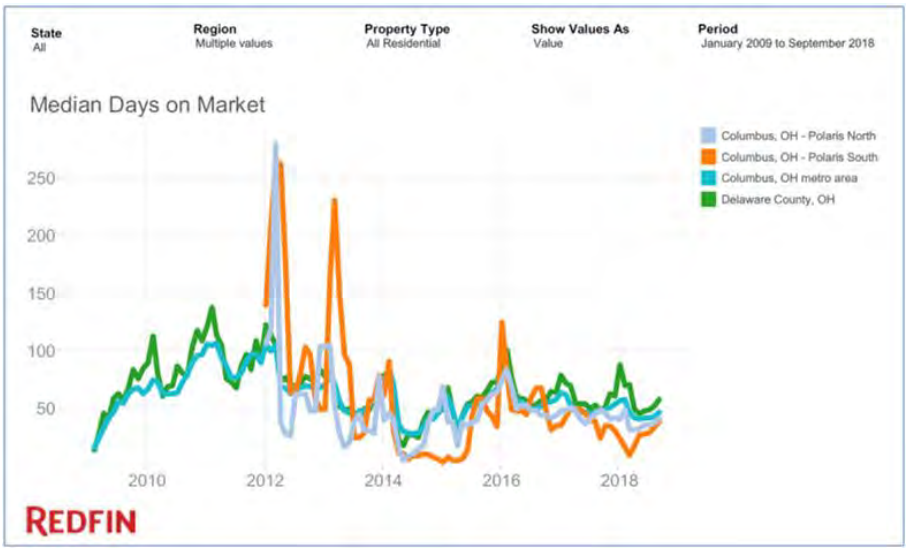
Chart 9



Time on Market

The amount of time required to sell a house is an important indicator of the direction of the housing market. The median number of days that houses stay on the market fell precipitously between 2012 and 2015, and has remained relatively stable since then.

Chart 10

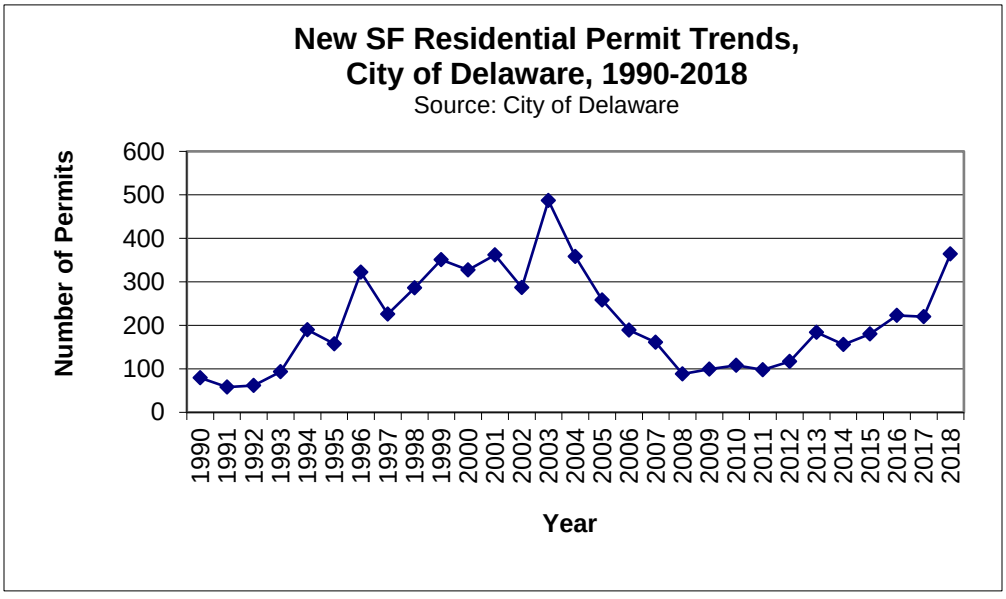


The amount of time required to sell a house is slightly longer in Delaware County than in the Columbus MSA as a whole. "Spikes" in selling time (as in the Polaris area) occurred when there were large new projects that opened up sales on the market, with the flood of new supply increasing the time required to sell homes.

Construction

Single-family housing construction increased gradually between 1990 and 2003, when the market appears to have peaked in Delaware.

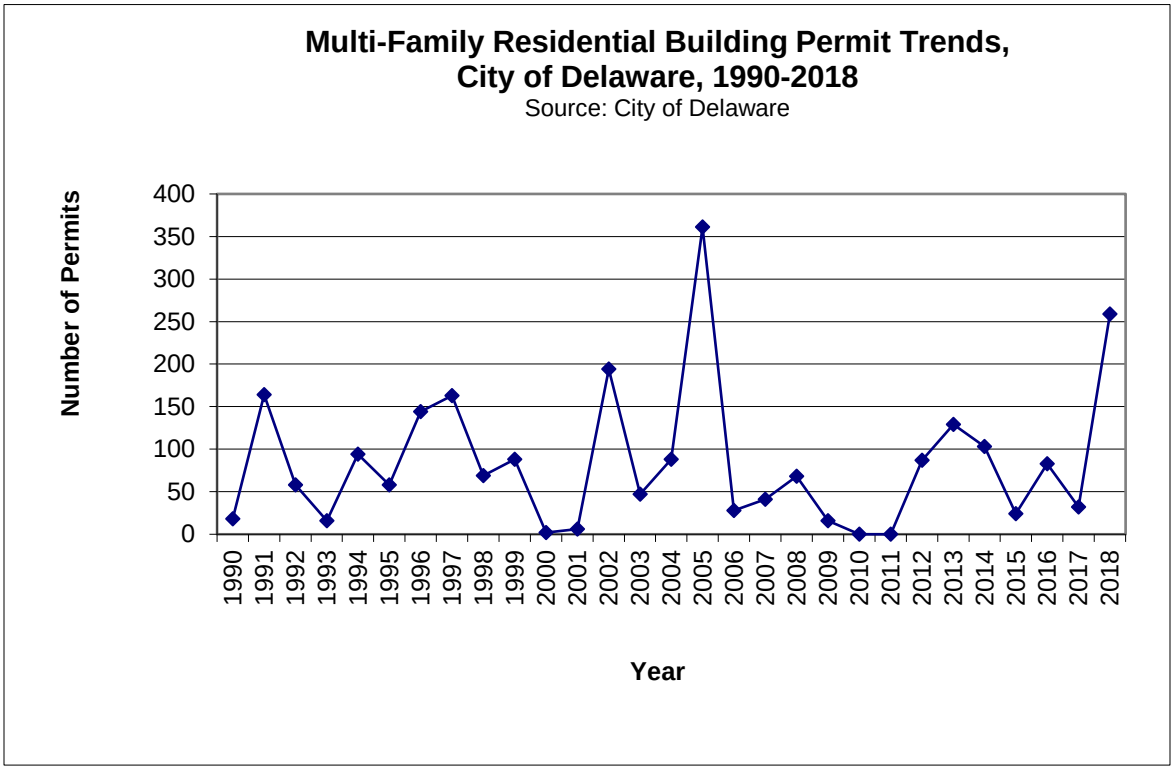
Chart 11



Single-family residential construction continued to fall between 2003 and 2008, when the city's and nation's housing market reached a nadir and began a slow recovery from a deep recession. While Delaware's single-family housing permits jumped to 364 by the end of 2018, single-family construction has still not met the peak of 487 units permitted at the peak in 2003.

Multi-family construction has fluctuated from year-to-year as a single project with multiple units can impact greatly on the overall permit activity in a given year. The largest number of multi-family permits was issued in 2005 at more than 350. And, 2018 saw the second-highest number of multi-family permits, with 259.

Chart 12



Overall, the high number of multi-family permits coincided with the continued growth in single-family units to generate a high number of overall residential permits in 2018. This convergence of single- and multi-family permits is not likely to happen very often, based on the city's historic trends.

Delaware Together

Southwest Industrial Area Opportunities Assessment







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Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

This report presents findings from an Opportunities Assessment for business and real estate development in the southwestern quadrant of the city of Delaware, as input to broader economic development and city-wide planning, especially future land use planning. A Baseline Economic Assessment (Report 1) provided an overview of existing economic and real estate conditions in Delaware and the regional context. This assessment takes the analysis one step further to identify possible economic development opportunities for this sub-area. The assessment does not constitute a detailed target industrial or real estate market analysis but does provide conceptual input based on a review of the area's competitive advantages and existing conditions.

Section 1 of this report provides a review of existing conditions within the southwest sub-area, with particular attention to the existing industrial business base and business operating conditions. Section 2 provides findings from a general opportunities assessment which drew from the market overview, existing conditions assessment, and input from key business stakeholders. Section 3 applies those findings to concepts for land use and development within the sub-area, focused on refining the key economic development nodes and corridors.

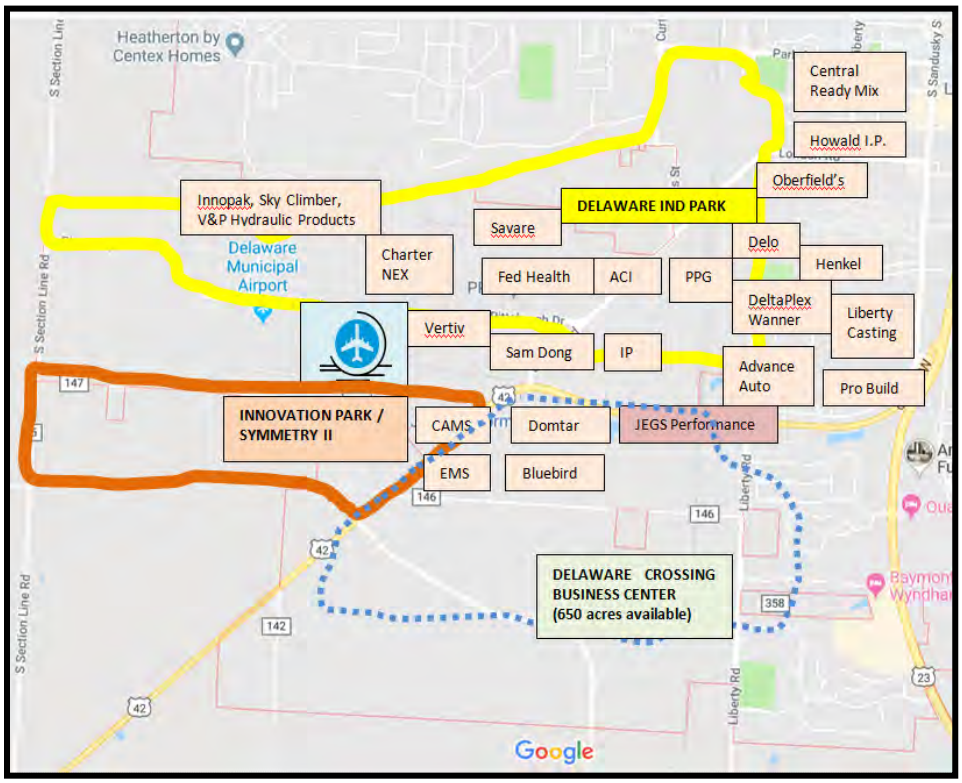
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Section 1. EXISTING CONDITIONS & SITE ANALYSIS

This section provides an assessment of existing physical conditions and a site analysis of the southwest area of Delaware. While other industrial nodes like the Kroger Distribution Center on the east side are critical to Delaware's economy, this report focuses primarily on industrial areas in the southwestern quadrant of the city. The assessment examined the existing industrial business conditions and the relative competitiveness of the area for attracting and retaining industry. Existing industrial parks and industrial business areas are identified and inventoried. The business base is categorized in terms of key clusters and typologies. The Site Analysis examined factors impacting on the competitiveness of the area as a business hub. Business input on operating conditions and opportunities was gathered through surveys and interviews with area businesses. Findings from these various assessments and inputs are summarized below.

Industrial Parks & Areas

The southwestern quadrant of Delaware has three areas that are loosely categorized or marketed as the "industrial parks" delineated below: Delaware Industrial Park, Innovation Park and Delaware Crossing Business Center.



Delaware Industrial Park is the oldest and most established of these three areas. While delineated on maps, there is little visible physical demarcation or definition of this area as an "industrial park," per se. Still, a number of the city's large and small industrial businesses are clustered here or nearby, including Oberfield's, Liberty Casting, PPG, ACI, Savare, ACI, DeltaPlex/Wanner, Henkel, Delo, ProBuild, Advance Auto, IP, Sam Dong, Vertiv, and Charter NEX. Also located here are newer tenants in the Delaware Municipal Airport area including Innopak, Sky Climber, and V&P Hydraulic Products. The park is generally defined for the purposes of this analysis as the "triangle" bound by Liberty Road (east), U.S. 42 / Pittsburgh Drive (south), and the railroad (north/west). This area extends along Pittsburgh Drive to Section Line Road and includes the airport.

The newer **Innovation Park** (including Symmetry II) is located on the south side of the Delaware Municipal Airport, generally bound by Airport Road (north), South Section Line Road (west), Sawmill Parkway/Slack Road (south), and U.S. 42 (east). This area has been pro-actively marketed for industrial uses and current businesses there include CAMS, EMS, Domtar, and Bluebird.

The **Delaware Crossing Business Center** is still conceptual as a future business location, with 848 acres potentially available for development on the south side of U.S. 42 (including 133 acres located in the city). The boundaries would be generally defined as U.S. 42 (north and west), Liberty Road (east), and south of Sawmill Parkway (south to Bunty Station Road). At present, the only large business operating in this area is JEGS Performance.

"Central Industrial Area"

In addition to these loosely defined industrial business parks is an undefined area of central/southwest Delaware that includes several industrial businesses and related activities plus a residential neighborhood that has probably housed workers in area industries.



This area is roughly defined as bounded by West William Street (U.S. 36, on the north), Curtis Street (west), London Road (south), and South Liberty Street (east).

Among the businesses in or near this area are Central Ready Mix, tenants in the Howald Industrial Park, AEP, Loeb Electric, Sims Brothers Recycling, MWD Logistics,

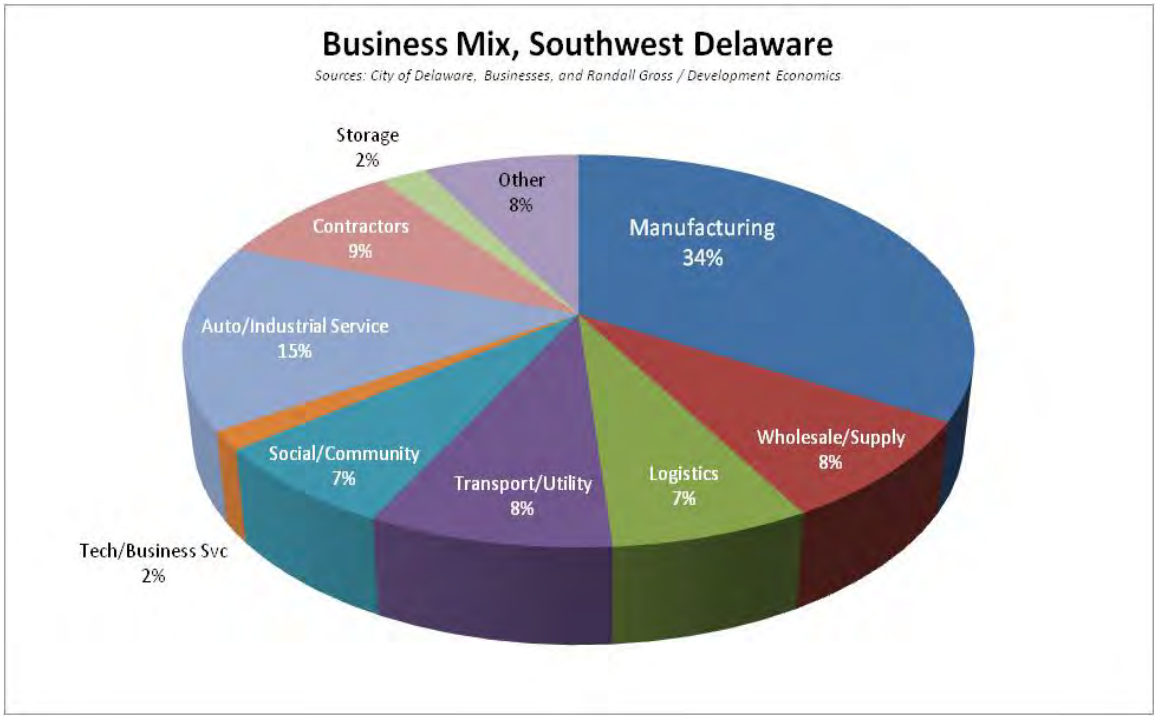
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Assurance Technical Services, Mail Pro 1, and Benchmark Woodworks, among others.

Inventory & Business Base

An inventory was conducted of existing uses within this area, with a focus on industrial and other businesses. The inventory identified approximately 130 diverse businesses, with the largest share (34%) being in manufacturing.

Chart 1



About 15% are in automotive and other industrial services, comprising the second-largest group of businesses. There are a similar number of contractors, wholesale suppliers, transportation & utility companies, social & community service providers, logistics companies, and other businesses, each comprising approximately 7 to 9% of the total. There are also a handful of technical/business service companies and storage services. Overall, the area can be characterized as being a manufacturing center, with ancillary transportation, supply, and industrial service providers.

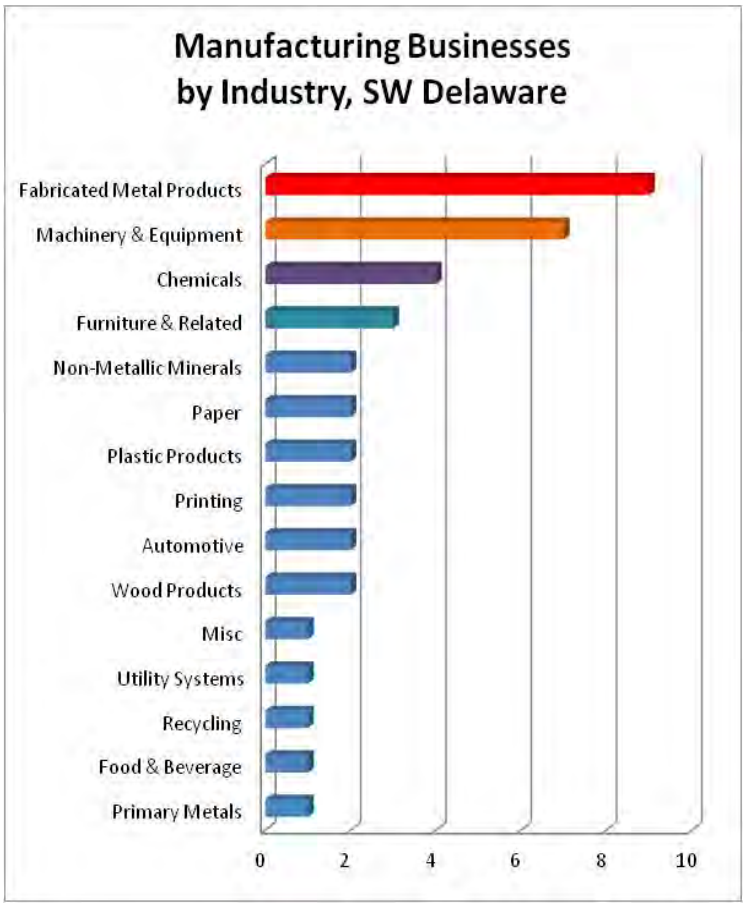
Manufacturing

The manufacturing base occupies a total of 3,034,800 square feet of space, based on data collected by the City of Delaware. This manufacturing base represents about 3,000+ employees and includes nine of the city's 12 largest employers. Major manufacturing employers include Domtar, PPG, Vertiv, Midwest Acoust-A-Fiber, Liberty Casting, International Paper, and Sam Dong.

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The manufacturing businesses were further disaggregated by industry, as summarized below.

Chart 2

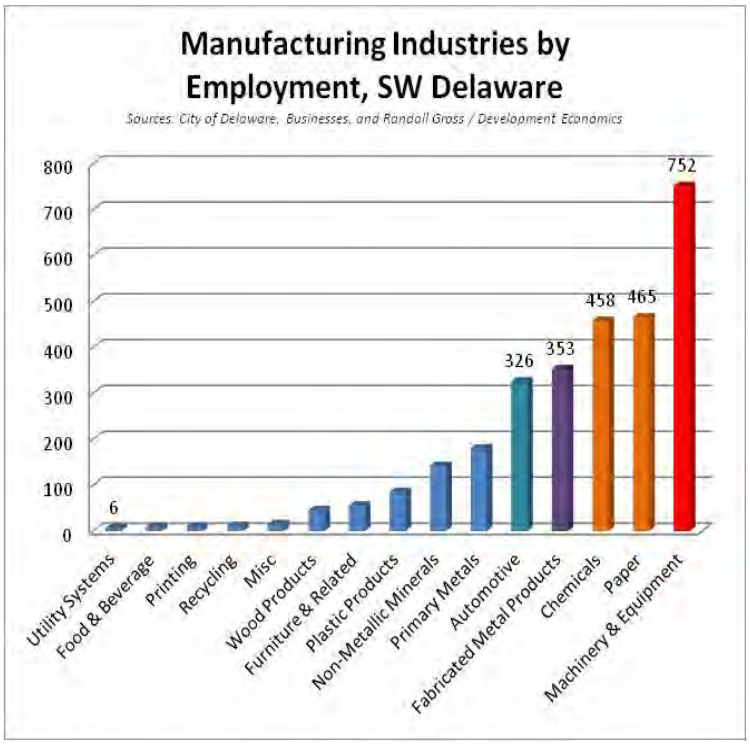


The largest number of manufacturing businesses is engaged in producing fabricated metal products, followed by machinery & equipment and chemicals. Among the industries represented by at least to two or three companies in this area are furniture/related, non-metallic minerals, paper, plastic products, printing, automotive, and wood products. There are also a handful of companies in other industries including utility systems (design and installation), recycling, food & beverage, and primary metals, among others.

These companies produce a very diverse selection of specific products ranging from personal hygiene products to chicken pluckers: *Millwork, Hygiene Products, 3-D Printing, Polyethylene Films, Chicken Pluckers, Adhesives, Signs, Ice, Machine Parts, Aggregates, Heat Exchangers, Cardboard, Paints, Portable Water Systems, Hydraulic Cylinders, Floor Molding, Heat Exchangers, and others.*

Employment in the area's manufacturing industries is concentrated in the production of machinery & equipment, with more than 750 employed in that industry. Close to 500 each are employed in paper and chemicals production.

Chart 3



Another 350 are employed in producing fabricated metal products and 330 in the automotive industry. More than 100 employees work in each of primary metals and non-metallic minerals, but less than 100 work in most of the other industries.

Transportation & Logistics

The southwest area is also home to several transportation hubs and transport-related businesses. Delaware Municipal Airport provides an anchor for the area, with Jetstream, Spencer Aviation, and Shamrock Air Service among the associated service providers. A master planning process is underway for the airport. Delaware Area Transit Authority (DATA) s also based in this area. Transport-related businesses include Delaware NEX Transport, Henderson Trucking, U-Haul, Buckeye Coach, and others.

Distribution. There are several distribution companies in the area, occupying a total of 1,508,000 square feet, based on the City's data. These companies employ about 1,660 and include Advance Auto Parts Distribution, JEGS Automotive (a mail order/Internet seller/distributor of automotive parts with

a 350,000 square-foot warehouse), Wanner Metal Worx, MWD Logistics and others.

Wholesale Trade / Supply

Wholesale trade and supply businesses in the area supply a mix of electrical equipment, geo-tech products, carpet & flooring, industrial chemicals, dental supplies, water softener equipment, and other products.

Site Analysis

Field reconnaissance and a site analysis were conducted to assess the area's physical conditions and general marketability as an industrial business location. Key observations from this analysis are summarized below.

Delaware Industrial Park & Central Industrial Area

These older industrial areas generally lack physical definition and pro-active marketing oriented to their specific competitive advantages. The "Central Industrial Area" around Liberty, London, and Curtis in particular lacks any definition as a designated and programmed industrial node. There are several aging multi-tenant industrial facilities in this area that appear to have declining appeal to companies seeking affordable but high-quality space.

Some of the area seems an odd mix of agricultural land with a rural character, factory housing, and spotty site-specific industrial development. There is undeveloped land but arranged in a somewhat inefficient and piecemeal patchwork, and much of this land is not available for sale. There is generally a lack of transition between industrial and non-industrial uses. As an investor, it would be challenging to determine how and where to develop within this context.

Pittsburgh Drive has provided an attractive gateway and has succeeded as an industrial location for high-profile global brands like PPG and International Paper, but its traditional "pad" site development format is largely built-out and favors "drop in" industrial development that may not fit the model for how most light industrial companies seek space in today's market. Many companies are looking for industrial space with flexible fit-out that is ready for move-in, rather than greenfield sites to construct large, purpose-built manufacturing plants.

Innovation Park/Symmetry

The newer industrial development areas south of the airport have also succeeded in attracting businesses. But the area generally lacks amenity value and such issues of character and amenity environment may impact on the long-term marketability of the area to firms that need to recruit workers from outside of the city. Like Pittsburgh Drive, this area is being developed in a way that is

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consistent with the traditional "industrial park" or suburban business park model with separated pad sites for businesses and a lack of walk-able amenities for workers. Such amenities could include restaurants, breweries, personal services and other businesses to serve the needs and lifestyle of workers.

Delaware Municipal Airport

The airport is an important asset within the Columbus region, providing opportunities as an amenity for various types of businesses. Jim Moore Field is home to approximately 100 aircraft and handles about 40,000 operations per year on its 5,800-foot runway. According to the City's web site, the field's Wide Area Augmentation System (WAAS) is among the several aviation upgrades including terminal and lounge improvements that have enhanced the airport's capacity for diverse operations and improved comfort for users.

Access Challenges

While the southwest area offers transportation access through a general aviation airport and several federal highways (U.S. 42, U.S. 23, and U.S. 36), as well as the new Sawmill Parkway, it is poorly located to provide direct access to the interstate highway system. This issue alone limits the area's capacity and marketability for distribution and manufacturing uses that are highly dependent on just-in-time delivery. That being said, access to Interstate 71 is within nine to ten miles or 25 minutes, which can provide some benefit.

The area also lacks direct access to executive and middle-management housing, which will be important in attracting companies to this part of Delaware. Certainly there is housing for young families and workers to the north and south-east of the area, but there are limited opportunities and amenity-rich communities for higher-level management within a short drive. At the same time, Dublin and southern Delaware County are located within a relatively short commute. Ultimately, however, having housing for executives in Delaware can help enhance the likelihood that they will locate their business there.

Business Input

Surveys and interviews were conducted to gather input from a sample of businesses on the challenges and opportunities relating to a Delaware location (with particular attention to southwest Delaware). The general consensus was that Delaware provides several advantages relating to location (centrally located within Ohio and the north Columbus area) and affordability (relatively low real estate costs compared to other areas closer in to Columbus). But Delaware lacks the necessary labor pool (un/semi-skilled and skilled production workers) to support significant industrial growth. Key issues relate to the lack of amenities, housing, and the environment that is created around industrial zones for attracting workers to Delaware.

Delaware as a Location

Representatives of the area's industrial companies were asked why they located in Delaware. In general, they either started the business there or purchased an existing plant in Delaware (so it was already there). Some of the businesses consolidated existing business in Delaware that had been in several locations (including Delaware) before. Finally, some businesses noted that Delaware is proximate to their client or customer base, such as the Honda plant in Marysville.

Key Factors in Location Decisions

Business representatives listed the key factors they have considered in their location decisions. Among them are location and market access, access to low/semi-skilled labor, low operating costs & taxes, and safety & security. They perceive that Delaware ranks fairly high on all of those factors with the exception of access to a large labor pool.

Growth Plans

About 30% of the surveyed and interviewed companies had plans to grow their labor force, as of spring 2019. Trade and other factors placing pressure on the manufacturing sector in the current market may have pushed that number down since that time.

What Assistance Could Help Local Businesses?

Business representatives agreed that more job readiness and basic life skills training is needed to enhance the local labor force's employability. Given the tight labor market and the lack of a large labor pool in Delaware, employers are trying to locate workers who meet the basic standards of showing up on time for work, prepared and ready to work. There was also a need stated for better transit or public transportation to get workers to their places of employment. Also mentioned was a need for more affordable workforce housing to attract and retain quality workers in Delaware.

Southwest Industrial Land Use

Finally, business input was sought on how best to plan for industrial business development in southwest Delaware. On this point, there appear to be two opposing minds. One group felt that there is a need to "encourage development of distinct nodes based on the character of the use for marketing and industrial development purposes." The examples that were given included some sense of marketing and physical definition for tech uses, heavy manufacturing, and a "commercial / light industrial mix."

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Another group felt that there is a need to "keep all industrial areas exclusively for industrial uses," and not let infiltration of mixed-use into the industrial zones. It may be that these two thoughts are not mutually exclusive, since there can be sub-areas that are oriented more exclusively to heavy and "noxious" industries that may otherwise have a negative impact on other types of uses. This separation of noxious uses is, in fact, how zoning originated in the United States. Ultimately, representatives of diverse businesses agreed that there is a need for more physical definition for industrial business areas in southwest Delaware, whether for marketing, investment, or separation of certain uses.

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Section 2. OPPORTUNITIES

This section provides input on conceptual opportunities for economic development within the southwest portion of Delaware. Identification of opportunities was based on the economic and real estate baseline analysis, site assessment, review of the existing business base, stakeholder input, and the prior target industries identified for the city of Delaware as part of the 2014 Delaware Economic Development Plan.

Current Target Industries

(2014 *Delaware Economic Development Plan*)

The 2014 *Delaware Economic Development Plan* identified primary and secondary targets for business recruitment and retention in the city. The primary target industries were mainly focused on targeting jobs for residents of Delaware based on their skills and the need to reduce commutation out of the city. Among the primary targets were "boutique" manufacturers; research & development; other professional, scientific & technical services; finance & insurance; wholesale trade; and information services.

Secondary targets were also identified, mainly as an approach to fill the gap in available jobs in Delaware in these sectors. The secondary targets identified in the 2014 *Plan* included retailers and arts, entertainment, and recreation employers.

Airport – Related Economic Development

There is also an opportunity within the southwest portion of Delaware to focus on the airport as an asset for attracting business to the area. Certain types of economic activities are attracted to locations near general aviation airports. These activities are discussed below as a basis for planning and economic development associated with the airport and surrounding areas.

Extensive and Immediate Travel Needs

Certain types of companies have management and employees with extensive and immediate travel needs that are met through direct proximity and access to private planes. Among the types of companies that form a target base for recruitment in southwest Delaware could be the following:

- Consulting, law, medical, advertising, and financial services firms
- Transportation services companies
- Agri-businesses

- Executives and boards of manufacturing companies, particularly those engaged in electronic equipment manufacturing, miscellaneous machinery manufacturing, and other selected industries.

High-Attention Marketing

Certain firms require a high-level of personalized attention for their clients as well as frequent visits by clients and potential customers. These firms have a high demand for private, general aviation services.

General Aviation Freight

There are several types of manufacturing companies that tend to utilize the services of general aviation airports on a regular basis because of the type of product or specific requirements for distribution. The factors and types of manufacturing businesses associated with high general aviation freight use are the following:

- Critical Needs: Medical emergencies and supplies
- High-Value Product: High-tech electronic equipment & parts, medical equipment, precious stones
- Perishables: Seafood, fruit

Objectives & Opportunities

Several objectives have been defined for economic development within Delaware and the southwest area of the city, and matching opportunities are identified that respond to those objectives. As noted earlier, the City has already identified target industries, so this effort is meant to refine and append those opportunities that may be best suited to the southwest portion of the city.

Diversification

There is a need to diversify the city's economic base and the business base within the southwestern portion of Delaware. Diversification and balance helps reduce or mollify the impacts of a downturn in any one sector. Diversification can also lead to collaboration and new product development, where diverse companies work together to share technologies for example on open platforms. Key to Delaware's diversification is to build on the city's existing strengths. Those strengths include its central location and its clusters in **transportation** and **construction**. Also a key strength is Delaware's **airport** as a marketing anchor for recruiting the types of businesses identified above that are attracted to general aviation airports. Enhancing the airport's services and "perks" for patrons will increase its competitiveness and thereby, the business recruitment potential for southwestern Delaware. This concept is developed further later in this report.

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Also important to diversification is the need for collaboration, including institution building and partnering among and between businesses in the area. Creating a southwest Delaware business consortium that promotes cross-pollination of ideas between businesses will be helpful. Finally, there is the opportunity for more interaction between consumers and production, such as through food & beverage as well as the "maker" culture that brings an audience and consumer appetite for local products.

Recruiting Resident Employers

The 2014 *Plan* initially identified a need to recruit businesses that employ local residents, since there is significant out-migration of residents and reverse in-migration of workers to Delaware (as noted in the Economic Baseline Assessment). Based on the Baseline Assessment, several specific industries are recommended to augment the target industry effort, including the following:

- Management Services
- Scientific & Technical Services, with a more specific emphasis on Industrial Testing, which could be recruited to the southwest area.
- Finance & insurance back office processing and services

Strengthening Brand & Identity

There are opportunities to enhance recruitment power by strengthening the southwest area's brand and identity. A key element of this strategy would be to define and delineate districts and nodes. Also important is to enhance amenity value and create more "cache" for the location. Finally, implementation of Delaware's existing *Branding & Wayfinding Strategy* will help reinforce these efforts.

Section 3. DISTRICTS, CORRIDORS & NODES

Based on the site analysis, input from businesses, and opportunities assessment, it was determined that there is a need to define specific districts and nodes for industrial business development. Strategic recommendations are therefore made for physical definition as well as marketing concepts for several sub-areas within the southwest portion of the city. Specific recommendations are made for the Delaware Industrial Park, the Central Industrial Area, and the Sawmill District (Delaware Crossing), as defined earlier in this report.

Strengthen Delaware Industrial Park

Several strategies are recommended for strengthening the area defined as the Delaware Industrial Park in southwest Delaware. The following strategies relate to general branding; to physical improvements that help to define the area, site assemblage and creating amenity value, and to establishing a Delaware "Concierge" Airport Hub.

Branding

First, it is recommended that the area be branded and marketed in association with the transportation and electronics industrial sectors, since these sectors are represented by clustering that suggest a competitive advantage for the area in attracting those industries.

Nodes, Gateways and Physical Improvements

It is recommended that commercial/mixed-use nodes be defined and strengthened along London Road at the intersections with Pittsburgh Drive and at U.S. Highway 42 West. These nodes can help focus attention so that the area does not seem as disparate and ill-defined. Ultimately, London Road is the main industrial artery through this area, and every effort should be made to enhance the image along this corridor. London Road should have the same character, or at least a character and image that is equally attractive, to Pittsburgh Drive. Creating a sense that one has entered a more deliberate, master-planned industrial area, would help enhance the image of this corridor and the industrial sites and buildings adjacent to it. Gateway features and signage should be unique and consistent within the Delaware Industrial Park area, especially along London Road and within the nodes. Landscaping and moderate buffering at the right locations (such as between heavier industrial and residential uses) would help "upgrade" the image of the area and enhance the overall aesthetic context.

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Assemble Sites and Create Amenity Value

As noted earlier, large portions of this area seem to have no coherent land use pattern, with agricultural and undeveloped land mixed haphazardly with industrial buildings, worker housing, and occasional commercial uses. It is recommended that the City consider working with property owners to facilitate a collaborative, shared-equity based site assembly strategy among private property owners that helps to create a more coherent collection of parcels for development or redevelopment.

The City could offer to examine the market and investment potential for use of these sites and to develop a request for proposals from developers on behalf of the owners, who could work in a shared equity arrangement with a prospective developer or user. The City and its Economic Development office would also help work on an infill development strategy focused on recruiting compatible uses along London Road. As part of this strategy, the City would work to define heavy industrial areas that are protected from encroachment through zoning and other regulatory mechanisms.

The City would also work with non-profit partners on projects as recommended in this comprehensive plan that help to create amenity value through delineated greenways and fitness trails, anchored by the new YMCA.

Establish Delaware Concierge Airport Hub

There is the opportunity, as identified in the previous section, of establishing a "Concierge Airport" hub associated with Delaware Municipal Airport. There would be more focus on providing corporate and personal services as part of this concierge concept that would appeal to the target clientele identified in the previous section. For example, a partnership would be formed with the nearby YMCA to provide member access to fitness facilities for those using the airport. On-site business and personal services would also be made available that are targeted to companies using the airport facilities.

The City's Economic Development office would examine opportunities for creating transportation, construction, and electronic equipment manufacturing and distribution clusters relating to recruitment of airport-dependent businesses. Economic Development would also identify institutional, government, and corporate partnerships in establishing technology anchors such as an incubator, associated with the airport. Again, the focus of the anchor would be to recruit entrepreneurs and small tech businesses in the transportation, construction, electronic or medical equipment arena that could be nurtured locally and graduate into larger spaces in the industrial park.

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Redefine Central Industrial Area As Mixed-Use Urban Industrial District

The central industrial area, as defined in this report, is the least defined of the existing industrial zones within the southwest area of the city. Here is an opportunity to create a more urban, mixed-use industrial district that provides amenity value and positively impacts on the surrounding residential neighborhoods. Key components of the strategy for this area including the following:

Create Area Master Plan

This area could be master planned as a distinct neighborhood, including a vision for infill development. The master planning effort would work to reduce conflict between uses while enhancing the overall aesthetics and amenity value of the area.

Corridor Streetscape Improvements

As part of the master planning effort, streetscape improvements would be integrated that would enhance the aesthetic appeal of the area. Streetscape efforts would be focused in he London Road Corridor to Sandusky Street, and along Curtis Street.

Integrate New Uses at Key Nodes

Protect industrial use but integrate commercial and residential where appropriate to create mixed-use environments. This area is relatively close into downtown Delaware and could become one of the city's exciting, mixed-use urban neighborhoods. New uses would be concentrated in a "signature" mixed-use node located at London Road and Liberty Road. The Howald Industrial Park would be redeveloped for mixed-use. There is a sizeable, undeveloped parcel at the front of Howald I.P. that could be developed as part of the initial phases of a mixed-use development at this node. The market to support such development would need to be tested.

One of the possible opportunities for integrating commercial / industrial "maker" uses into this area would be through food & beverage facilities including a brewery or distillery. A brewery, along with restaurants, could help establish a hub for residents and workers in southwest Delaware and could also attract other consumers from throughout the city and beyond. There is also the opportunity to integrate rental apartments or other residential into these mixed-use nodes, as tested though the residential market analysis and discussed in Report 3.

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Convert Office to Maker/Tech Space

Low-performing office space in the area might be converted to use by makers, small tech firms, and entrepreneurs. This space might provide an opportunity for move-up among incubator firms or small companies looking for affordable start-up space in the area, including those originating in other parts of the northern Columbus market. Again, having amenities like a brewery and restaurants will help in marketing this space and the area in general as a location for small start-ups, makers, and entrepreneurs.

Establish Master Plan for Sawmill District (Delaware Crossing)

The Delaware Crossing Business Center or Sawmill District should be master-planned to help guide development and provide investors with a vision for the area. As a framework for planning, this area has been disaggregated into three sub-sections and described in terms of their marketability for various uses. The three sections include the area West of U.S. 42, an "Amenity Node" located at Sawmill Parkway and U.S. 42 West, and East of U.S. 42.

West of U.S. 42: "Tech/Industrial"

The area west of U.S. 42 is already developing as a mini-business park area, incorporating Innovation Park and Symmetry II. There is an opportunity to build on the industrial technology testing cluster and to promote advanced manufacturing in this area. The area could benefit from branding and services associated with the "Concierge Airport" concept, since it is situated adjacent to the airport property and could potentially offer a south entrance to the airport.

"Amenity Node" at Sawmill and U.S. 42 West

Development of a mixed-use node at Sawmill Parkway and U.S. 42 West is recommended to provide amenity value to this southwestern "corner" of the city in support of both residential and economic development. A mixed use node at this location would also provide a southern "gateway" into the city's industrial business area. The node would offer convenience and shopper's goods retail, personal services, and restaurants if proven to be supported by the market. There is also the possibility of integrating workforce residential development into the node and establishing an attractive environment that would attract workers to live in the area.

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East of U.S. 42 "Corporate" Corridor

The portion of the Sawmill District east of U.S. 42 would have a more "corporate" business park character, although it would still accommodate a mix of industrial uses. The City would help facilitate site assembly by working with area property owners, similar to the effort recommended in the Central Industrial Area. Light manufacturing and back office administrative service uses would be among the types of businesses recruited to this area. Recruitment targets would include management consulting services in human resources, marketing, and process management; as well as firms engaged in logistics and associated consulting, consistent with the types of companies likely to locate near a general aviation airport. The district would have consistent character and design throughout, with branded elements and marketing.

Summary

The southwestern portion of Delaware is dominated by industrial uses, which fan out from downtown along U.S. Highway 42 West and nearby streets. Older industrial areas within the "Central Industrial" triangle formed by London Road, Liberty Road, and U.S. 42 accommodate a handful of heavy industrial facilities alongside residential neighborhoods and under-utilized buildings and land. The Pittsburgh Drive corridor succeeded as a suburban-style industrial park that is now largely built-out with large, single-use buildings. The growing Delaware Municipal Airport anchors this corridor. Newer areas south of the airport have attracted several light industrial uses. JEGS placed its headquarters south of 42 and plans for land along Sawmill Parkway have envisioned more industrial development further south.

The competitiveness of southwest Delaware has changed over time as interstate highway access has attracted industrial development away from older highway corridors like U.S. Highway 42 West. That being said, Delaware's growing airport and Sawmill Parkway provide opportunities for attracting businesses through higher-value environments and amenities. This report has recommended strategies for creating more amenity value through development of mixed-use nodes and residential uses along Sawmill Parkway, and by focusing amenity-based marketing for tech and high-value industrial uses near the airport. Meanwhile, recommendations are also made for infill and redevelopment of older buildings and land within the Central Industrial area of southwest Delaware. The older areas near the city's core provide an opportunity for recapturing a more "urban" mix of maker space, emerging tech uses, residential, and retail that could attract younger workers to the area. Companies tend to follow the work force in a tight labor market, so attracting a young workforce helps in securing opportunities for business development.

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Delaware Together

Residential Market Analysis







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Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

A Residential Market Analysis was conducted for the city of Delaware as an input to Delaware Together comprehensive plan. The market analysis helps inform future land use planning, especially within several key sub-areas of the city. But the analysis also informs economic development efforts, where housing is a key issue impacting on the city's overall competitiveness for recruiting business. Existing housing conditions and overall market trends were analyzed as input to a Baseline Report produced earlier. The market analysis in this report forecasted the housing potentials in the city and defined specific products and sub-area development concepts.

Section 1 of this report examines housing market drivers and defines the housing market area for Delaware. Section 2 provides findings from the housing demand analysis, which forecasts demand based on various factors impacting on the housing market area. Section 3 determines Delaware's capture of demand within the competitive market, thus defining Delaware's housing development potentials within the next five to seven years, which is a reasonable forecast period after which market projections are less reliable. Section 4 provides recommendations relating to the housing products best suited to meet the needs identified in the market, as well as development strategies for key sub-areas of the city.

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Section 1. HOUSING MARKET DRIVERS

This section examines housing market drivers, market niches and cohorts. Input from real estate professionals and lenders active in the Delaware housing market helped inform this discussion. The housing market area is also defined in this section of the report, in terms of its geographic parameters and various sub-markets.

Market Niches and Cohorts

Information collected from brokers, lenders, and project managers helped provide input on the key existing niches and cohorts within the Delaware housing market. Challenges and opportunities were identified through this engagement with stakeholders and also through field reconnaissance and assessment of existing housing market conditions.

Market Sources

Based on the information collected from the aforementioned stakeholders, Delaware tends to attract its market from a diverse set of demographic and geographic cohorts. Among these are first-time buyers, including many people born and raised in Delaware. A fairly substantial portion of Delaware's high school graduates tend to stay in the area, many of them renting for a time and then looking to buy once they have families. Those young families are often looking for housing priced in the $180,000 to $220,000 range, but many are priced out of the market because of a lack of housing in that range or (among the college graduates) because of student loan burdens, according to lenders. On the other hand, the housing on offer in Delaware has been successfully priced to attract homebuyers from locations closer to Columbus and other parts of the metropolitan area.

Overlapping with this group is the age cohort of Millennials, with singles looking for housing with "less grass" but families with children more apt to purchase traditional suburban-style housing. Families with children are often moving based on the reputations of certain school districts.

Another important age cohort includes empty nesters of the Baby Boom generation, some of whom are moving "down" within the Delaware market while others are moving to Delaware from other parts of the Columbus region. There is demand from this group for two-bedroom / two-bath condominium units, according to brokers. Many are moving to Delaware for lower income taxes and one-floor living arrangements. Some are moving in from more rural areas in order to downsize and be closer to medical and other services. Households in this

cohort appear to be seeking housing in the $200,000 to $225,000 price range, on average.

There are also local workers who live elsewhere (including more rural areas further out from the city) but would otherwise live in Delaware if they could afford it. As noted in the Economic Baseline report, a majority of Delaware's workers fall into this category of commuters from outside of the city, while most Delaware residents work outside of the city.

Brokers and others generally agreed that Delaware attracts those from Columbus or Franklin County for several reasons including, more affordability, lower income taxes, good schools and "small town living."

Affordability Gaps

Brokers and lenders agreed that there appears to be an emerging "affordability gap" in Delaware. Lenders estimate that 30% to 40% of prospective Delaware loan applicants cannot afford the note or don't have cash for down payment. Some have perceived that younger applicants have prioritized material possessions like cars and short-term consumables over housing; and they have noted that there may be a need for more homebuyer education.

Brokers suggest that new housing prices are not aligned with demand generated by first-time buyers, empty nesters, and local workers from within Delaware. They have agreed that there is a "lack of affordable housing" in Delaware for local residents and workers, even as Delaware's housing prices are found to be lower than those in Columbus and southern Delaware County. In other words, Delaware's housing is unattainable for many residents and workers in Delaware but is comparatively affordable for residents of Columbus who would have to pay even more for housing there. Land prices are increasing, leading some brokers to identify a need for higher housing densities to reduce the impact of land price. Some of these issues are commonplace nationwide and result from a growing economy, a maturing real estate market, and low unemployment (now at just 3.7% nationally). Compounding the issue of affordability is that Ohio Housing Finance Agency (OHFA) tax credit income thresholds have increased, with a fairly high range of $75,400 (in non-target areas) to $91,680 in target areas.

Key Market Drivers & Assets

Input from stakeholders, along with field reconnaissance and assessment of baseline conditions, helped to identify key assets and drivers for Delaware's housing market. Some of these assets are consistent with those identified by businesses as driving Delaware's economic growth and development.

- **Location and Proximity**. Being located in the growing Columbus Metropolitan Area is a key factor impacting on Delaware's overall competitiveness for housing. Unlike most other metro areas in Ohio, Columbus has a diversified economic base and appeals to young graduates, with a growing labor market. Columbus is also relatively affordable, when compared with other growing metro areas, and Delaware is even more affordable yet has good access to Columbus's growing job base. Delaware also has good access to regional shopping at Polaris, Dublin's corporate hub, and Columbus CBD (Central Business District), and Honda's large U.S. plant in Marysville. Finally, Delaware offers access to a general aviation airport for executives and others with private planes.

- **Institutions**. Several colleges are located in Delaware that graduate young people into the labor market and create opportunities for housing. Ohio Wesleyan University and its 1,600 students are an important asset for Delaware as is Methodist Theological School of Ohio and nearby Columbus State Community College. Delaware is also home to County Government, which helps stabilize the local economy and generate demand for housing government workers.

- **Heritage and Small-Town Living**. Delaware has an historic downtown that is attractive for those seeking a small-town lifestyle and walk-able amenities. Historic architecture, the Strand Theater, Hamburger Inn Diner, and other unique assets form part of the appeal. Overall, Downtown Delaware provides a "sense of place" that is very attractive in a world filled with strip malls. Downtown Delaware has been designated as a "Great Place in America" by the American Planning Association (APA).

- **Existing Business Base**. Large employers including Ohio Health, Kroger, Advance Auto, Jegs Automotive, Vertiv, PPG, International Paper and others help generate demand for housing in Delaware. Small businesses including entrepreneurs and downtown retailers are also important as drivers for the housing market. As noted earlier, there may be a slight mismatch between jobs & wages and the availability of housing that is affordable to local workers.

Market Area Definition

The residential market area from which Delaware draws demand includes a relatively broad area extending south into Columbus and north/west into neighboring counties. The market area can be disaggregated into four sub-markets as follows.

A) **Delaware City**. The housing market is driven by demand generated from demographic chance and housing choices within the city, from recent high school

graduates moving up into rental apartments or first-time buyers, and from move-downs among older residents due to the aging of the population.

B) **Remainder of Delaware County**. This area includes other parts of Delaware County. Households from Sunbury and areas of southern Delaware County are also part of the Delaware city housing market.

C) **Northwest Counties**. Counties located to the north and west of Delaware, including Morrow, Marion, and Union, are also part of the Delaware housing market. Some of the city's current and potential workers live in these counties and commute down into Delaware for jobs.

D) **Northwest Franklin County / Columbus**. Portions of the northwest part of Franklin County and the city of Columbus are also part of the primary market base for housing in Delaware. Brokers and sales figures confirm that communities like Westerville, Dublin, northwest Columbus, and Hilliard are sources of market base in Delaware.

In addition to these areas, there is also inflow from other parts of the Columbus metropolitan area as well as from people relocating to the area due to work or for other reasons. Ultimately, however, the primary market comprises areas of the northwest corridor or quadrant of the Columbus metro area.

Section 2. DEMAND ANALYSIS

This section provides findings from a demand analysis of residential development in Delaware. Demographic trends and forecasts were developed for each sub-market within the housing market area as a basis for determining overall demand within the next five to seven years. Employment forecasts by industry also helped inform the housing demand forecasts, since job growth will help drive demand, especially for rental housing. *Sample* demographic and economic indicators that were used in the analysis are discussed below, with a focus on the Delaware city sub-market.

Housing Tenure & Household Forecasts

Household demographic factors like age and mobility impact housing tenure and therefore, the demand for different types of housing product. Households were examined throughout the market area by age cohort and housing tenure and the relationship between these two factors is illustrated below for the Delaware city sub-market. Again, this information provides just a sample from one of the sub-markets that comprise the overall market area. So, household projections for the Delaware city sub-market were only a small portion of the basis for forecasting overall demand.

Table 1. HOUSING TENURE BY AGE COHORT, DELAWARE CITY, 2017

Age Cohort	Renters	Owners	TOTAL	Share Rent
15-24	464	83	547	85%
25-34	1,276	1,226	2,502	51%
35-44	999	2,358	3,357	30%
45-54	837	1,809	2,646	32%
55-64	776	1,564	2,340	33%
65-74	546	1,158	1,704	32%
75-84	245	607	852	29%
85+	124	179	303	41%
TOTAL	**5,267**	**8,984**	**14,251**	**37%**

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

In general, rental tenure declines with age of householder. However, the city of Delaware has an unusual "bump" in middle-age renters, with about one-third aged 55 to 64 in rental housing. Households were forecasted by age and tenure through 2024, with an overall increase of about 740 households over the next five years within the city of Delaware sub-market alone. The largest number of new market area households (6,690) will be created in northwest Columbus. The following table again provides just a sample household-by-age forecast from one small portion of the overall market area.

Table 2.	**HOUSEHOLD FORECASTS BY AGE & TENURE, DELAWARE CITY, 2019-2024**		
Age Cohort	**Renters**	**Owners**	**Total**
15-24	127	23	150
25-34	(200)	(192)	(392)
35-44	(50)	(118)	(168)
45-54	138	297	435
55-64	72	145	217
65-74	78	164	242
75-84	68	169	237
85+	9	12	21
TOTAL	**241**	**501**	**742**
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

The number of householders in the upper age brackets will increase, thanks to growth in both the baby boom and millennial generations. There will be a demographic "bust" among those reaching the ages of 25 to 44 by 2024, indicating not a "loss" of population but lower birth rates and the "aging out" of Millennials into lower middle age.

Household Income Forecasts

Household income is another important indicator of demand. Incomes have increased and are expected to continue increasing throughout the market area. The highest incomes are in the remaining portions of Delaware County (outside of the city of Delaware), with a median income of $112,430, expected to increase by 3.6% per year to $132,770 by 2024. Median income in the city of Delaware is at $72,720 and is expected to increase by 2.5% per year to $81,700. The following table provides a summary of household income trends and forecasts from 2000 through 2019 and forecasted to 2024.

Table 3. HOUSEHOLD INCOME TRENDS AND FORECASTS, DELAWARE HOUSING MARKET AREA, 2000-2024					
Area	**2000**	**2019**	**2024**	**2000-2019 Change/Yr**	**2019-2024 Change/Yr**
Delaware	$ 48,399	$ 72,718	$ 81,711	3.1%	2.5%
DE County	$ 70,033	$ 112,427	$ 132,770	3.8%	3.6%
NW Counties	$ 43,662	$ 60,468	$ 64,366	2.4%	1.3%
NW Columbus	$ 58,883	$ 82,697	$ 90,632	2.5%	1.9%
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.				

Incomes are lower in more rural areas to the northwest and are increasing at a slower pace than in other areas. Incomes in north-west Columbus are slightly higher but are also increasing at a slower pace.

Table 4. HOUSEHOLD FORECASTS BY INCOME DELAWARE CITY, 2019-2024			
Income Cohort	**2019**	**2022**	**Change**
<$15,000	1,335	1,257	(78)
$15-$25,000	1,075	1,002	(73)
$25-$35,000	1,145	1,056	(89)
$35-$50,000	2,183	2,007	(176)
$50-$75,000	2,661	2,668	7
$75-$100,000	1,962	2,100	138
$100-$125,000	1,525	1,610	85
$125-$150,000	1,171	1,287	116
$150-$200,000	1,178	1,456	278
$200,000+	1,100	1,634	534
TOTAL	**15,335**	**16,077**	**742**
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Within the city of Delaware, there will be household growth among those with incomes over $50,000, but a decrease in households with incomes under $50,000 due in part to the impacts of inflation.

Mobility Factors

Household mobility plays an important role in generating demand for housing, with higher mobility rates generated demand in larger numbers. As shown below, mobility rates are higher among younger householders and among renters. Within the city of Delaware, for example, renter mobility rates among those householders aged 15 to 24 exceed 77%, compared to 33% for those aged over 85. While mobility rates for 15 to 24-year-old renters exceeds 77%, they are only 49% for homeowners in the same age cohort.

Table 5. HOUSING MOBILITY BY TENURE AND HOUSEHOLDER AGE, DELAWARE MARKET AREA, 2010-2014

Age Cohort	Delaware City		Delaware County		NW Counties		NW Franklin/Columbus	
	Rental	Owner	Rental	Owner	Rental	Owner	Rental	Owner
15-24	77.4%	49.3%	70.0%	61.4%	69.9%	52.1%	69.2%	61.7%
25-34	63.3%	40.4%	57.3%	50.2%	57.2%	42.6%	56.6%	50.5%
35-44	66.5%	24.2%	64.4%	24.9%	56.6%	17.8%	64.1%	22.2%
45-54	54.4%	19.8%	52.7%	20.4%	46.3%	14.5%	52.4%	18.2%
55-64	60.5%	22.0%	58.5%	22.7%	51.4%	16.1%	58.3%	20.2%
65-74	60.6%	12.8%	63.3%	14.9%	35.3%	9.0%	49.3%	10.8%
75-84	49.6%	10.5%	51.8%	12.2%	28.9%	7.3%	40.3%	8.9%
85+	33.0%	7.0%	34.5%	8.1%	19.3%	4.9%	26.9%	5.9%

Sources: U.S. Bureau of the Census and Randall Gross / Development Economics.

Renter mobility rates tend to be higher in the city of Delaware than in other parts of the market area. Meanwhile, owner mobility rates tend to be somewhat lower.

Employment Forecasts

Employment growth will enhance demand for housing in Delaware. As has been shown recently, insufficient housing may exist to accommodate Delaware's workers, most of whom live outside of the city while Delaware's residents work elsewhere. Regardless of where people work, regional job growth will increase opportunities for housing development throughout the Columbus market.

The Ohio Department of Job and Family Services (JFS) projects the Columbus region to add about 31,750 jobs by 2024. The fastest growth will be in ambulatory health care services, where employment is expected to increase by 36.9% in just five years. Increasing use of the Internet for retail shopping will drive non-store (online) retail employment at companies like Amazon up by 30.1% by 2024. As evidence of this growth, Amazon has announced an immediate need to hire 30,000 workers nationwide to handle its online sales and distribution growth.

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Growth in management, scientific and technology services in the Columbus region is expected to top 25.0% over the next five years. Security trading and investment-related employment will increase by 20.0%, while office administrative service employment will be up by 15.2%. Other exceptional job growth will be experienced by construction (12.4%), employment services (12.2%), wood products manufacturing (11.1%), and specialized design services (10.5%), according to JFS.

Based on its historic role in the region and current trends, Delaware is expected to capture an aggregate of about 1.49% of this regional growth, or about 500 jobs in existing and new business growth. This rate of growth is relatively conservative, equivalent to about 30% to 40% of the growth experienced by Delaware between 2010 and 2015. Still, the number is realistic, given that economic growth nationally and regionally is slowing from the rapid pace experienced as the nation recovered from the recession during that 2010 to 2015 period.

Market Area Demand Summary

Housing demand will be generated by a combination of the net growth in households, changing demographics, mobility, employment growth, and replacement. Demand generated by several of these factors is summarized below.

Household Growth

The addition of new households will generate significant demand. Overall, the market area will see the addition of about 11,700 households in the next five years, of which about 6,700 will be in the northwest quadrant of Columbus and the rest spread throughout Delaware, Morrow, Marion and Union counties. The sub-market comprising the city of Delaware is projected to add about 740 households by 2024, but this projection does not account for demand generated from the broader market area or induced by Delaware's job growth, which is then captured through housing development in Delaware. Some of these new households will occupy existing vacant units (about 5.0% to 7.0% of the total in the city of Delaware, according to the Census), but most will generate demand for net new housing.

Plus Mobility-Driven Demand

Demand will also be generated by some of the 250,000 existing households who are moving around in the market. Mobility patterns will dictate that only a share (+/-14% per year, on average) of these 250,000 existing households will seek new housing, and those seeking housing are more likely (or in higher percentages) to be younger and renters.

Plus Job Growth-Generated Demand

The addition of nearly 32,000 jobs in the region, and possibly 500 within the city of Delaware, will also impact on demand for housing. The creation of new jobs will not only bring new householders into the market base, but also "pull" existing households towards housing within the commuter shed or to housing that is closer to those jobs. If housing that is affordable to those workers is not available, then they will have to locate further away from those jobs.

Plus Replacement-Generated Demand

There are about 16,000 housing units in the city of Delaware and 300,000 housing units in the market area. An average of about 1.0-2.0% of these existing units (or 3,000 to 6,000 units market-wide) would need to be replaced in five years, either because of demolition due to fire or other loss, conversion to other uses, damage, or condemnation. Within Delaware, this number is estimated to be closer to about 50 to 60 units (0.3-0.4%) over five years, based on recent trend information provided by the City.

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Section 3. DELAWARE HOUSING DEVELOPMENT POTENTIALS

Delaware's capture of market area housing demand was determined in the competitive market, considering existing projects in the city as well as competitive sites and projects elsewhere. The city's housing potentials were determined and translated into specific recommended development products that meet the need or demand within demographic cohorts. Finally, broad housing development concepts are recommended for key sub-areas in Delaware, based on the market findings.

Competitive Framework

The existing and planned development projects in Delaware provide a base for capturing market-area demand, while projects and neighborhoods in other parts of the market area and beyond compete with Delaware for home buyers and renters. Some of Delaware's neighborhoods and projects (described in the Baseline Assessment) are listed below, followed by a discussion of competitive housing.

City of Delaware

As noted in the Baseline Assessment, Delaware has existing neighborhoods with attractive housing. Among the city's neighborhoods are Northwest Delaware (historic district), East Side (1800's to post war (WWII) era, plus Old Colony Estates), University District (anchored by Ohio Wesleyan), the Marvin/Delaware Meadows area (offering smaller, mid-century housing), and both the West Side and "Southeastern District" designated for the purposes of this plan (offering a number of newer suburban projects).

Among the city's active single-family residential developments are Curtis Farms, Ravines of the Olentangy, Belmont Place, Glenross North, Communities at Glenross, Lantern Chase, Heatherton, Springer Woods, Winterbrook Place (planned), Stockdale Farms (planned), Terra Alta, Braumiller Woods, Old Colony Estates, and Willowbrook Farms. Active condominium and townhouse developments include the Lakes at Cheshire, Enclave at Adalee, and the Enclaves at Olentangy (planned). Multi-family apartment projects under development include The Reserve at Quail Pass, Flats on Houk, and Seattle House Apartments.

The city of Delaware is a hub for multi-family rental apartments in the \\area, with about 44 of the 86 competitive properties inventoried for this analysis. Most of the others are concentrated in the Polaris area, and they are clearly marketed based on their proximity to Polaris (since "Polaris" appears in the name

of nearly all apartments in that area). New and older apartment communities in Delaware include Village Gates, Flats on Houk, Hayes Colony, Burr Oak Commons (55+ years old residents), Stratford Park, Rolling Meadows, and others.

Delaware & NW Franklin Counties

Certainly, there are competitive areas of southern Delaware County and northwest Franklin County that continue to attract homebuyers and renters because of their proximity to jobs and amenities in Dublin, Columbus, and nearby areas. Residential developments around Powell and Lewis Center benefit from proximity to Polaris and a growing jobs base within the county itself. There were more than 200 actively-marketing residential developments inventoried for this analysis in southern/eastern Delaware County and northwest Franklin County, outside of Columbus. As noted above, the Polaris area and Columbus is also a hub for apartment communities. A sample of these communities includes the following:

Lewis Center. Courtyards at Clear Creek, Grand Pointe at North Orange, Courtyards at the Ravines, Evans Farm, Nelson Farms, Oak Creek at Polaris (apartments), Lake Club (apartments), Dooley's Orchard (apartments), Tapestry Park Polaris (apartments), The Mirada (apartments), Lakes at Olentangy (apartments)

Sunbury. Communities at Sunbury, Northlake Preserve, Northstar, Goldwell at Northstar

Powell. Heathers at Golf Village North, Courtyards on Hyatts, Liberty Trace, Hyatts Crossing, Clarkshaw Meadows, Clarkshaw Moors, Reserve at Scioto Glenn, Carpenters Mill, Powell Grand Communities (apartments)

Galena. Summerwood Lakes, Cheshire Woods, Ravines at Alum Creek, Corners at Johnnycake, Retreat at Warner, Brookview Manor, Reserve at Hidden Creek, Summerwood Lakes, Retreat at Dustin, Communities at Galena

Westerville. Preserve at Rocky Fork, Crossings at Rocky Fork, Reserve at Eagle Trace, Village at Central College, Bigham, Courtyards at Village Crossing, Preston Hollow, Albany Crossing, Ashton Village (apartments)

Dublin. Courtyards at Muirfield Ridge, Autumn Rose Woods, Riviera Regency, Courtyards at Riverside

Hilliard. Heritage Preserve, Tarlton Meadows, Anderson Meadows

Other Areas. Sanctuary at the Lakes (Africa), Glade at Highland Lakes (Africa), Courtyards at River Bluff (active adult 55+ near Delaware), Pines at

Berlin Station (near Delaware), Glenmead (near Delaware), Creekside Preserve (Johnstown), Meadows of Mill Creek (Ostrander), Liberty Village (Shawnee Hills)

Northwest Counties

There is also competitive development in Morrow, Marion, and Union counties, and surrounding areas to the north and west of Delaware. Much of the competitive product is concentrated in Marysville, not far from the Honda plant, or in Plain City. Among the competitive residential projects in those areas are Ewing Meadows (2-story Single Family / Villas & Ranches) (Marysville), Mill Valley North (Marysville), Adena Pointe (Marysville), Jerome Village & Courtyards at Jerome Village (Plain City), Darby Fields (Plain City), Weaver Ridge (Marysville), Keystone Crossing (Marysville), Orchid Hill (Plain City), Hickory Run (Marysville), Reserve at New California (Plain City), and others.

Northwestern Columbus & Other Areas

There are also a number of competitive developments in various phases of construction in the northwest portions of Columbus. Among these are Founders Park at Harrison West, Minerva Park, Homes at Grandview Yard, Homes on Pullman Way (Grandview), Jeffrey Park, Truberry on Second, Southern Tier, The Chelsea, The Pointe at Polaris (apartments), Residences at North Park Place (apartments), Ravines at Westar (apartments), 801 Polaris (apartments), NorthPark Place in Polaris (apartments), Polaris Place (apartments), and others. Various eastern suburban communities are competitive, with various projects under development in New Albany, Johnstown, and other areas.

Delaware Capture & Potentials

Delaware housing development potential was determined in the competitive market and forecasted out five to seven years as an input to planning. Potentials were determined for both rental and for-sale housing, as disaggregated below.

Rental Housing Potentials

Delaware could capture demand for about 970 to 1,700 rental housing units over the next five to seven years (or about 190 to 300 per year). A significant portion of that demand would be generated for affordable and attainable housing units, for households with incomes below Delaware's median income. Demand for market-rate units would range up to about 600 rental units over the next five to seven years, yielding potential for about 120 market rate units per year. Construction trends indicate that the city had been permitting about 100 multi-family housing units per year up to 2019, so there has been a gap between demand and supply of market-rate rental housing in the city.

There would be demand for about 360 to 600 attainable housing units for those households earning 80% to 100% of the city's estimated median household income of about $72,700 in 2019. Those attainable housing units would typically serve the needs of recent graduates entering the work force or employees at Delaware's manufacturing and other industrial facilities, many of whom cannot otherwise find affordable housing in the city. Thus, these units represent an opportunity to meet the need of under-served market for attainable housing in the city.

Table 6. RENTAL HOUSING POTENTIALS, DELAWARE, 2019-2024

Rent Range	Area Capture Moderate	Area Capture High	Market Rate
$ 300	192	239	-
$ 500	97	139	-
$ 600	87	140	
$ 700	171	306	
$ 800	152	293	223
$ 1,100	97	198	147
$ 1,200	51	124	88
$ 1,500	34	111	73
Sub-Total	**881**	**1,549**	**530**
Attainable	*355*	*584*	
Job Induced	**87**	**175**	**60**
TOTAL	**969**	**1,724**	**590**

Sources: U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.

About 90 to 175 of the forecasted demand would be generated by projected job growth and Delaware's propensity to capture that "job-induced" growth over the next five to seven years. The break points above represent rents at 30%, 80% and 100% of estimated median household income in the city.

For-Sale Housing Potentials

Delaware could capture demand for about 680 to 850 for-sale housing units over the next five to seven years, or 130 to 170 units per year. The City has been permitting about 170 units per year. The total includes about 270 to

440 attainable and affordable housing units that could meet the demand generated by existing Delaware workers and young resident families, many of whom are underserved in the existing for-sale housing market.

Table 7. FOR-SALE HOUSING POTENTIALS, DELAWARE, 2019-2024			
	Area Capture		**Market**
Price Point	**Moderate**	**High**	**Rate**
$ 106,250	183	193	-
$ 156,250	88	95	-
$ 218,750	99	110	110
$ 247,500	83	95	95
$ 288,750	17	20	20
$ 367,500	36	43	43
Sub-Total	**506**	**556**	**268**
Job-Induced	**179**	**298**	**144**
TOTAL	**685**	**854**	**411**
Sources:	U.S. Bureau of the Census; Claritas; and Randall Gross / Development Economics.		

Projected job capture would generate demand for about 180 to 300 for-sale housing units, including 140 to 150 market-rate units. Break points shown above represent housing prices that are affordable at 30%, 80% and 100% of the city's estimated 2019 median household income. *Altogether, the market analysis suggests that Delaware could generate demand for about **1,650 to 2,580** rental and for-sale housing units over the next five to seven years*. The broader timeframe allows for the possibility of an economic slowdown, which would delay and slow housing market growth for an average of two years.

Section 4. DEVELOPMENT RECOMMENDATIONS

Based on the findings of the market analysis, coupled with stakeholder input from within the real estate and lending industries, several recommendations are made with respect to the types of housing product needed to meet the demand forecasted in this report. Also recommended are development concepts or strategies for sub-areas within the city, with a particular focus on Area 1 (South Eastern District) and Area 2 (South Western District). These recommendations are summarized below.

Targeted Housing Products

Recommended housing product development would be targeted to meet three specific objectives. First, product is recommended to help create more available attainable housing and meet the needs of Delaware's own employment base. Second, there is product recommended to meet the needs of an aging Baby Boom generation and "empty nesters." Finally, there are recommended products to help diversify the overall single-family product base in the city as part of marketing the city for executives, workers, and families.

Attainable Housing

Meeting the needs of existing and potential new workers at Delaware's various manufacturing and other business facilities is a priority as it helps to close a gap in the market and ameliorate the cross-commutation patterns that characterize Delaware's labor market. "Attainable" is defined for the purposes of this analysis as pricing affordable to those workers with household incomes at 60-80% of Delaware's estimated 2019 median of $72,700 per year. Key products needed to address this need include more rental apartments, preferably those built in mixed-use or walk-able formats that are well-integrated with the community. Another target product would be "higher-density" single-family development, such as in the form of "cottage communities," townhouses, vertical mixed-use, and 0-lot line developments.

Cottage-style communities, which include smaller units with smaller yards but high amenity value through shared open space, recreation amenities, and walk-able development patterns, are becoming a popular product not only as an affordable alternative but also for empty nesters and others looking to lower maintenance costs. Finally, there are opportunities for rehabilitation of existing housing in older neighborhoods within the city. These rehab opportunities could be leveraged through incentives and infrastructure investments.

Empty Nester Housing

As noted above, empty nesters are looking increasingly at "maintenance-free" housing products in walk-able neighborhoods. The Baby Boom generation has driven housing demand and formats for nearly 60 years, and this trend continues today as the largest single demographic cohort in the housing market starts to downsize and express a lifestyle preference for walk-able environments. Again, the products most suited to this lifestyle include condominiums, 0-lot line developments, and "cottage homes" or small-lot single-family units in HOAs or similar shared maintenance arrangements. As this population cohort ages, then efforts will need to ensure that housing remains accessible, since the vast majority of seniors prefer to "age in place" rather than relocate to independent or assisted living developments.

More Diverse Single-Family Product

Delaware has benefited from development of relatively affordable, single-family product, especially on the south-east side. Unfortunately, some of these new communities lack a sense of place and high-quality product. There is a need to avoid "cookie-cutter" housing development, and to encourage more walk-able developments that incorporate some mix of uses. Having a small convenience node can help to encourage walking within a neighborhood. Where possible, new communities should be integrated seamlessly with existing neighborhoods but not in a way where drivers are "lost" within a never-ending swirl of cul-de-sac developments.

Delaware has the opportunity to attract master-planned development in the form of a traditional neighborhood (TND) or other community that offers a mix of single- and multi-family housing along with commercial uses in a walk-able environment. There is increasing demand for this product in Delaware.

Sub-Area Concepts

There are several special areas that have been defined through the Delaware Together planning process. Two of these areas offer significant potential for new housing development within the timeframe of the implementation of this plan: Special Area 1 (South Eastern District, as indicated by an oval shape on the map) and Special Area 2 (South Western District, indicated by the square shape on the map).



Input from the market analysis, real estate professionals, and the Southwest Industrial Area assessment helped to inform recommendations for

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development and redevelopment concepts for these sub-areas, as summarized below.

Area 1 (South Eastern District)

The south eastern portion of Delaware includes a number of newer single-family residential developments, many of which are melded together in a way that it is sometimes difficult to tell where one development ends and another begins. The housing stock, pricing, and community layout are fairly uniform, with limited variation and few amenities to anchor neighborhoods and establish neighborhood identity.

Here there is the opportunity to diversify the housing stock as noted previously in this section, and to create more walk-able neighborhoods through the addition of small amenity centers or commercial nodes that incorporate convenience uses as well as amenities like parks or recreation facilities.

The south eastern district is well-suited as the location for a traditional neighborhood development (TND), because of its proximity to downtown Delaware as well as its accessibility to employment and shopping nodes to the south around Polaris and Dublin. A TND in this location would need to be amenity-rich and offer a mix of housing products (single-family detached, apartments, condominiums, and cottage homes), along with a retail/commercial center. Ultimately, a TND provide Delaware one of its best opportunities for attracting housing to meet the needs of executives and professionals who commute into Columbus/Polaris/Dublin or who might establish offices in a newly branded Sawmill District corridor.

Area 2 (South Western District)

The city's south western district could provide a competitive location for housing if an "amenity node" were to be established as part of the Sawmill District Gateway recommended as part of the Southwest Industrial Assessment. This amenity node might include a mix of attainable housing (apartments, mixed-use, townhouses, cottage home community) along with retail, restaurants, services, and recreation amenities.

This amenity node would complement the "corporate" character and intent of marketing the Sawmill Corridor for industrial and office business uses. Closer to U.S. Route 23, the area would evolve a more "residential" character, consistent with the existing uses in that area and the marketing of a traditional neighborhood development in the south-east.

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MEMORANDUM

TO:	Sarah Kelly, AICP, Senior Project Manager Planning NEXT
FROM:	TischlerBise, Inc.
DATE:	May 18, 2020
RE:	City of Delaware Fiscal Efficiency Evaluation

Background

The City of Delaware Comprehensive Plan presents strategies to manage Delaware's land use and growth decisions in a fiscally sustainable manner. The Comprehensive Plan includes strategies to maximize land uses, preserve the quality of place, and ensure development pays its fair share of improvements to provide necessary public services like transportation infrastructure, utilities, parks, recreational facilities, and public safety.

Factors Influencing the Fiscal Sustainability of Land Uses[1]

Numerous factors influence the fiscal results for different land uses. These factors include, but are not limited to:

- Local revenue structure,
- Services provided,
- Local levels of service,
- Capacity of existing infrastructure, and
- Demographic and market characteristics of new growth.

Local Revenue Structure

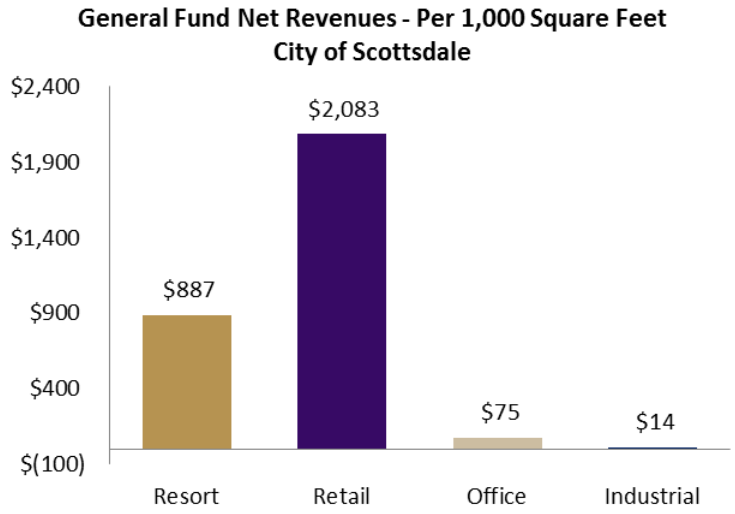
A key determinant in calculating net fiscal results from new development is the local revenue structure, which affects fiscal findings through both its composition and revenue distribution/collection formulas. Every community has at least one major revenue source, and in some cases, several on which it is reliant. Examples include property tax, local sales tax, and state shared revenues. An important component of

[1] L. Carson Bise, AICP. *Fiscal Impact Analysis: Methodologies for Planners*, (American Planning Association, 2010)

revenue structure is the distribution/collection formulas for various sources. With the exception of property tax, the distribution/collection formulas for common revenue sources can vary greatly from state to state. For example, in states where sales tax is collected, some allow communities to assess a local option sales tax, which is usually collected on a situs-basis (point of sale). Other states collect sales tax at the state level and distribute the revenue to communities using a population-based formula. A similar situation exists with income tax, where some states allow a local income, or "piggyback" tax on top of the state income tax. In certain states, such as Maryland, this tax is collected by place of residence. In others, such as Ohio, it is collected by place of employment.

Examples are shown below from two cost of land use studies for prototype nonresidential land uses in each community. The figures show results for nonresidential development per 1,000 square feet of floor area. Data points above the $0 line represent net surpluses; data points below the $0 line represent net deficits. The first example shows results for the City of Scottsdale, Arizona, where the main source of revenue is a "point of sale" sales tax. Note the positive results for retail development.

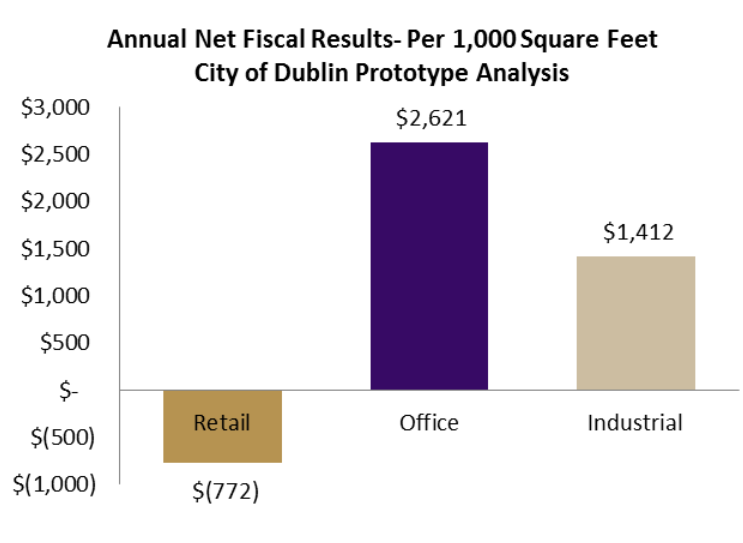
Figure 1: Example of Fiscal Impact Results: Locality with "Point of Sale" Sales Tax



Source: TischlerBise

Compare the results from Figure 1 to the City of Dublin, Ohio, shown in Figure 2. Cities in Ohio have a local income tax, which is based on place of work rather than place of residence. Note here the results for retail development showing that retail land uses cost more to the City than they generate in direct revenue.

Figure 2: Example of Fiscal Impact Results: Locality with Local Income Tax by Place of Employment



Source: TischlerBise

Services Provided

Another important factor in the fiscal equation is the services provided by the jurisdiction. Jurisdictions provide different services and the fiscal impact analysis will reflect this—and stakeholders and the audience for the study will need to understand this. For example, in many states, School Districts are separate entities with their own tax rates (e.g., Florida, Ohio). In other states, schools get their local funds from County General Fund taxes (e.g., Virginia). Fiscal analyses will obviously reflect the services provided and funding streams, and audiences need to be aware of this to prevent both unintentional and deliberate confusion.

Levels of Service

Another factor in fiscal impact analysis is an understanding of the levels of service currently being provided in a community. Existing levels of service are defined as the facility or service standard currently being funded through the budget. Examples of level of service standards are pupil teacher ratios (i.e., 1 teacher per 24 students), parkland per capita, etc. This is an important factor since levels of service generally vary from community to community.

Capacity of Existing Infrastructure

The capacity of existing infrastructure in a community also has a bearing on the fiscal sustainability of new development. For example, a community may have the capacity to absorb a large number of additional vehicle trips on its existing road network or may be significantly under capacity with regards to high school

enrollment. In either of these situations, using a case study-marginal cost approach that accounts for existing facilities and levels of usage to assess fiscal impacts, a community with excess capacity could absorb substantially higher growth over time without making additional infrastructure investments than a community without these capacities. This excess capacity results in lower capital costs over time. This is an important factor in the fiscal equation, since the largest cost associated with capital facilities are the annual operating costs, which typically account for approximately 80 percent of a community's budget.

Demographic and Market Characteristics of New Growth

Next to a community's revenue structure, no other factor has as great an impact on the net fiscal results as the demographic and market characteristics of different land uses. Examples of demographic and market variables for residential development include average household sizes, pupil generation rates, market value of housing units, trip generation rates, density per acre, and average household income. Important demographic and market characteristics for nonresidential development include square feet per employee, trip generation rates, market values per square foot, sales per square foot (retail), and floor area ratio.

Existing Financial Condition

The balance of revenue to expenditures is a complex process, the details of which are best reviewed in either the City's annual budget or Comprehensive Annual Financial Report (CAFR). The budget process for the City is generally a balanced process from year to year; however; some expenditures and investments in infrastructure can occur over several years. The framework established to distribute these revenues towards the various costs to serve development consists of several Funds. These Funds include: the General Fund; Special Revenue Funds; Capital Projects Funds; Debt Service Funds; and Enterprise Funds.

The City has several funds/revenue sources in place to contribute to and address the cost of development. Below is a description of some of the sources of revenue the City has established to fund infrastructure.

Impact Fees: Impact fees are one-time payments used to construct system improvements needed to accommodate development. Impact fees must be proportionate and reasonably related to the capital facility service demands of new development. The City collects impact fees for parks, police and fire services, and municipal facilities.

Enterprise Funds: These are funds where user fees are set to recover the cost of providing services and facilities such as water distribution and wastewater collection to the City's utility customer base. These revenues are used to cover operating and some capital items such as debt service. The City augments these revenues with impact fees, designed to recoup new growth's share of needed infrastructure.

Capital Improvement Funds: Other funding for improvements includes pay-as-you-go funding out of current revenues for lower cost improvements. Grants are used to bridge funding gaps and leverage additional funds. Bonds also provide an inexpensive way to finance largescale projects. The City transfers

bond sale proceeds to Debt Service Funds that account for principal and interest payments on major, debt-financed infrastructure projects such as roadway construction.

Tax Increment Financing Funds: TIF funds account for the tax increment financing real estate tax payments received related to new development. The TIF funds are to be used to pay for the cost of constructing the infrastructure required to serve the new development and to reimburse the developer for onsite improvements. TIF proceeds are remitted to the developer as received.

Revenues

Like all Ohio cities, the City of Delaware's main source of discretionary funding is its local income tax. By way of example, income tax represents almost 64% ($16.5 million) of total General Fund revenue ($25.8 million) in FY2020 (shown in Figure 3 below). The discretionary portion of the income tax is accounted for in the General Fund. It is used to pay the majority of administrative salaries, as well as for many capital projects in the City. Other portions are used to fund the City's fire department operations and recreation improvements, which are accounted for in Special Revenue Funds.

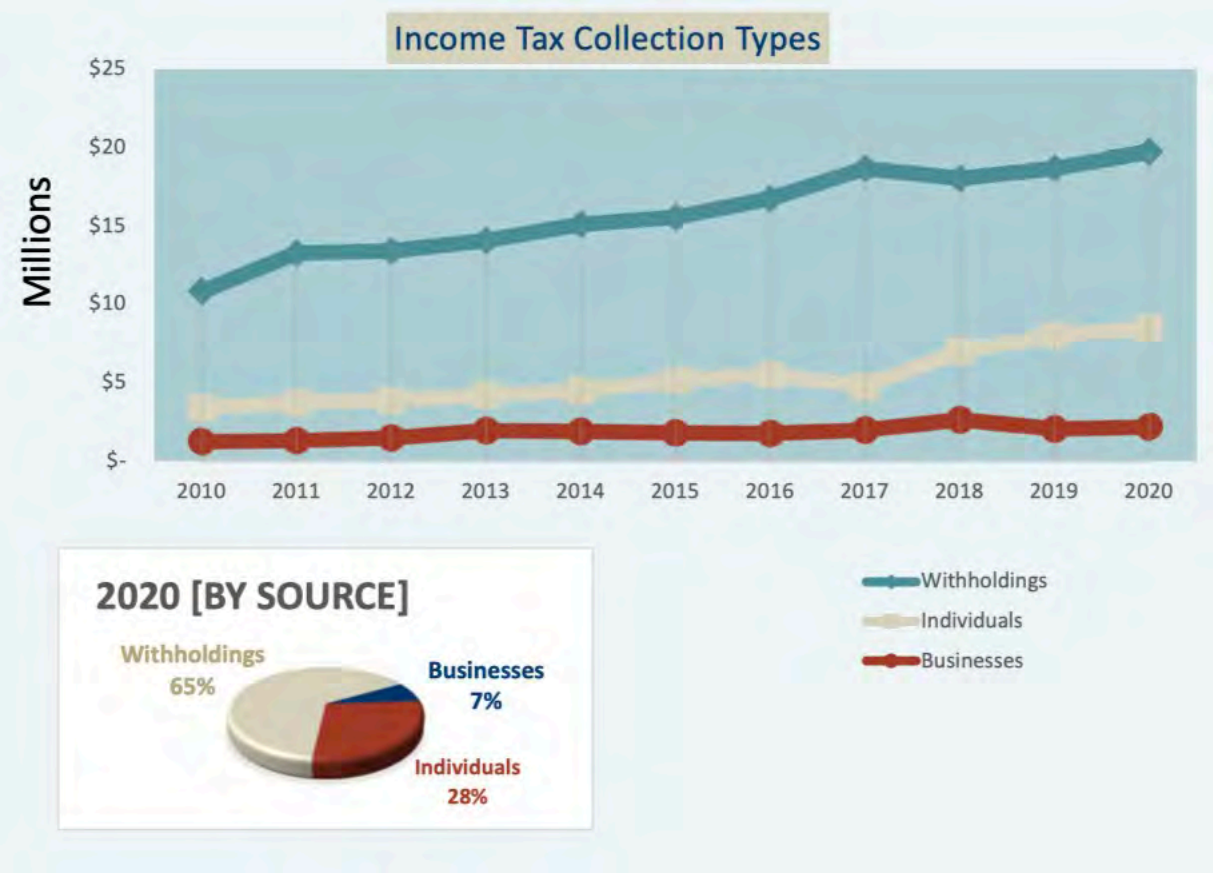
Figure 3: City of Delaware FY2020 General Fund Revenue

Revenue Type	FY2020 Amount	Percent
Property Tax	$1,720,000	7%
City Income Tax 1%	$16,510,750	64%
Inheritance Tax	$0	0%
Local Government Fund	$700,000	3%
Grant Reimbursements	$141,726	1%
Fines and Forfeitures	$100,000	0%
Court Diversion Fees	$40,000	0%
Engineering Fees	$900,000	3%
Prosecutor Contracts	$260,000	1%
Parking Meters	$38,000	0%
Cable Franchise Fee	$415,000	2%
Liquor Permits	$50,000	0%
License and Permits	$1,335,000	5%
Investment Income	$950,000	4%
Miscellaneous	$230,000	1%
Reimbursements	$150,000	1%
Transfer Grant Administration	$30,000	0%
Transfers	$2,269,603	9%
TOTAL	$25,840,079	100%

Source: City of Delaware FY2020 Budget

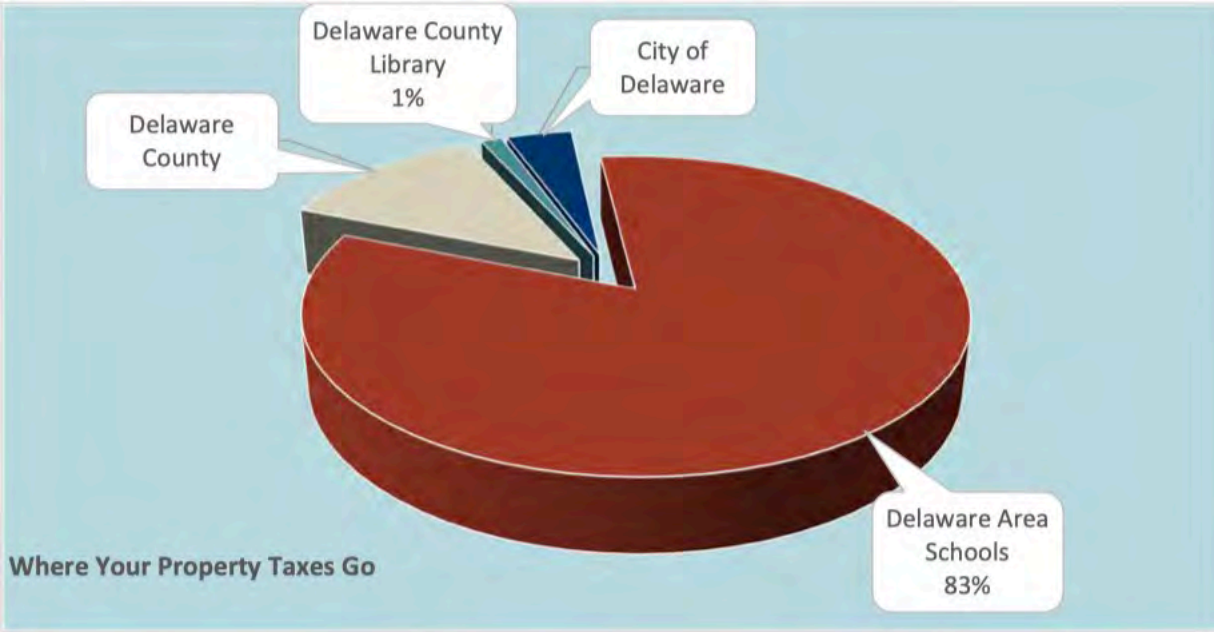
The City's current income tax rate is 1.85% of income based on withholdings, individual filings, and business profits. As shown in Figure 4, approximately 65% of income tax comes from withholdings in FY2020, followed by individuals (28%) and businesses (7%).

Figure 4: City of Delaware Income Tax Collections



Delaware also assesses a property tax. However, the vast majority of property taxes (96%) paid by City residents is to the County, County Library District and School District. The City of Delaware only receives only about 4% of property tax. The City's property tax is allocated to the General Fund, as well as a dedicated amount to police and fire pensions.

Figure 5: City of Delaware Property Tax Distribution



The City also receives revenue from engineering fees, water capacity fees, sewer capacity fees, building permits, and growth management fees (park impact, police/fire, transportation municipal). While these fees currently keep the City budget balanced, they need to be continually assessed as expenses change over time due to growth and other factors.

Expenditures

The City provides a range of services to residents and workers including police and fire safety services, public works facilities development and maintenance, water treatment and distributions, storm water and sanitary sewer maintenance, solid waste collection, parks and recreation maintenance, and community development services. It should be noted that the City is not responsible for funding school costs.

General Fund expenditures by department are presented in the figure below.

Figure 6. City of Delaware FY2020 General Fund Expenditures

Expenditure Type	FY2020 Amount	Percent
City Council	$186,520	1%
City Manager	$927,225	4%
Administrative Services	$424,253	2%
Economic Development	$503,655	2%
Legal Affairs/Prosecutor	$880,636	3%
Finance	$1,691,137	7%
Income Tax Refunds	$650,000	3%
General Administration	$4,485,873	17%
CIP Transfer	$1,850,000	7%
Reserve Transfers	$75,000	0%
Risk Management	$349,100	1%
Police	$9,677,542	37%
Planning	$1,514,433	6%
Engineering	$2,034,549	8%
Building Maintenance	$571,767	2%
TOTAL	$25,821,690	100%

Source: City of Delaware FY2020 Budget

An additional $26,752,643 is budgeted for capital investments necessary to accommodate growth, and to provide a consistent level of service to residential and nonresidential development. These expenditures are accounted for in the Capital Improvement Funds and reflect programming for investments in general government, public safety, streets, water, parks and recreation, and airport infrastructure and equipment.

Funding for improvements includes pay-as-you-go funding out of current revenues for lower cost improvements. Grants will be used to bridge funding gaps and leverage additional funds. Bonds provide an inexpensive way to finance large-scale projects. Lastly, impact fees are one mechanism used by the City to ensure growth pays for its share of necessary public services. Impact fees, paid by developers, serve to ensure continued levels of service, by funding new infrastructure and facilities necessitate by growth.

Strategies to Improve and Maintain Fiscal Sustainability

The City of Delaware currently enjoys a strong fiscal position as a result of local and regional economic growth and the implementation of thoughtful fiscal and land use policies. The Comprehensive Plan has identified strategies that maximize the benefits of projected growth by balancing fiscal priorities with quality of life improvements. The planning process reveals a tolerance for densification through infill development as well as a desire to see the targeted redevelopment of areas that are considered blighted or otherwise underutilized from a land use perspective.

Infill

The Comprehensive Plan identifies a community desire to encourage infill development as a means to slow outward growth, to create vibrancy in commercial districts, and to stabilize districts. Typically, infill development takes advantage of already existing public infrastructure like streets, water, and utilities with the capacity to absorb the growth in a vacant or underutilized property. By encouraging investments to be made within developed areas the property values of the surrounding neighborhood may benefit. Increased property values is a net gain for Delaware; however, because property tax is not a large revenue stream for the City, the purpose of infill is more to encourage vibrancy and create demand for additional commercial/office/service sector land uses that generate employment and thus income tax revenue.

Redevelopment

Redevelopment of areas that are not currently utilized for residential, industrial, or agricultural purposes provides the City with an opportunity to expand its tax base and accommodate growth through the provision of additional housing or services. The Comprehensive Planning process has identified over 1,500 acres for redevelopment. Compared to infill, redevelopment can require more significant upfront capital investment, depending on the extent to which the area was already served by public infrastructure. Tools such as Tax Increment Financing ("TIF") and Community Redevelopment Areas ("CRAs") can be utilized to fund some public infrastructure in redevelopment areas (although it is understood that parcel TIFs are currently in favor with the State). The City of Delaware has experience using both TIFs and CRAs to support the redevelopment of blighted or underutilized areas.

Development Types

Chapter 4 of the Comprehensive Plan identifies development types that currently exist in the City of Delaware; these development types serve as the building blocks for the Character and Land Use Plan (Chapter 5) and recommendations (Chapter 7). Traditional Town/Urban development types tend to reflect higher density, more pedestrian-friendly land uses than Suburban development types, which reflect low-density, auto-oriented land uses.

Given the revenue structure and capital demands of land uses in the City, the best means to maintain fiscal sustainability is to diversify and intensify the land uses with an emphasis on nonresidential uses. Because of the City relies heavily on income tax from workers who are employed within the municipality

it is fiscally beneficial to prioritize mixed-use and nonresidential land uses and to target high-income industries, in particular.

However, as shown in the figure below, no single land use provides strictly positive fiscal result. The City collects property tax and more importantly income tax from nonresidential establishments, but per the Institute of Transportation Engineers ("ITE") nonresidential development tends to generate more vehicle trips, stressing the street infrastructure, and typically has higher rates of public safety calls compared to residential uses.

Suburban residential development types (low density) typically generate higher property tax revenues, but often require extension and maintenance of streets, water, and utilities out to greater distances than Traditional Town / Urban (higher density clustered development). According to the Institute of Transportation Engineers ("ITE") sprawling development generates more vehicle trips per housing unit than a unit in a multi-unit structure, and on average single residential units in Delaware have more persons per household than units in multi-unit structures, which generates more vehicle trips, and demands for public safety, and parkland capital investments.

Figure 7. Hierarchy of Higher Density Development Prototypes and Fiscal Benefits

TRADITIONAL TOWN / URBAN					
	Tax Revenue		Demand for Services	Demand for Infrastructure	Fiscal Benefit
Development Type	Property	Income			
Residential (per Unit)					
Small Block Neighborhood - Traditional	Medium	-	Medium	Medium	Neutral
Small Block Neighborhood - Neotraditional	Medium	-	Medium	Medium	Neutral
Large Block Neighborhood - Traditional	Medium	-	Medium	Medium	Neutral
Nonresidential/Mixed Use					
Traditional Activity District	Low	Low	Low	Low	Neutral/Positive

Figure 8. Hierarchy of Lower Density Development Prototypes and Fiscal Benefits

SUBURBAN					
	Tax Revenue		Demand for	Demand for	Fiscal Benefit
Development Type	Property	Income	Services	Infrastructure	
Residential (per Unit)					
Single Family - Early Suburban Neighborhoc	High	-	High	Medium	Neutral/Negative
Single Family - Late Suburban Neighborhooc	High	-	High	Medium	Neutral/Negative
Multifamily Complex	Low	-	Medium	Low	Neutral
Mixed Residential	Varies	-	Medium	Medium	Varies
Nonresidential / Mixed Use					
Neighborhood Scale Activity Center	Medium	Medium	Low	Low	Positive
Community Scale Activity Center	Medium	Low	Low	High	Neutral
Regional Scale Activity Center	Medium	Low	Low	High	Neutral
Commercial Corridor	Varies	Varies	Low	Low	Varies
Industrial					
Industrial Campus	Low	Medium/High	Low	Low	Positive
Industrial Corridor	Low	Medium	Low	Low	Positive

Industrial employment is assumed to pay higher wages and salaries than retail per nationwide averages and given regional trends for the industrial employment sector discussed in Chapter 3. Office employment tends to generate higher income than retail jobs—of the nonresidential development prototypes, only Suburban Neighborhood Scale Activity Center includes office land uses, which contributes to its positive net fiscal benefit.

***Note Regarding Annexation*:** The annexation of developable land has also been identified as a potentially fiscally beneficial growth management strategy, although the cost of expanding infrastructure and services must be carefully considered in the development and implementation of any annexation strategy. Moreover, the Comprehensive Plan process does not recommend annexing any property within the next ten years. The fiscal sustainability of annexation will depend on the development plan for the annexation area.

Real Estate Market Assessment

City of Delaware, Ohio



Prepared For:

The City of Delaware Economic Development Department
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January 19, 2021

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I. Executive Summary

DiSalvo Development Advisors, LLC (DDA) has analyzed the residential and commercial market conditions in the City of Delaware to identify market-supported development opportunities in several targeted areas identified by the city.

The City of Delaware's employment profile no longer matches that of their residents. The dominant blue-collar resident population of decades ago has shifted to two-thirds of the population now in white collar occupations, matching the employment profile of Franklin County residents. The shift coincided with the commercial development of the Polaris area in southern Delaware County. As a result, the labor pool for the city's existing employment sectors is shallow and growth has been reliant upon attracting out-of-town workers. A thoughtful development strategy with unique land use can set the foundation to attract more business types who are more representative of Delaware's current residents.

It is DDA's opinion that a market exists at varying levels for all types of commercial and residential (re)development throughout the city. A summary of key market findings by development type and market-supported development opportunities by area follows:

Rental Housing

Inventory: DDA surveyed 24 apartment properties (50 or more units) totaling 3,171 units. A proposed 178-unit apartment development in Coughlin Crossing, named Coughlin's Crossing Apartments, was recently approved by the City of Delaware.

Occupancy: 97% occupancy level among market-rate properties, including two properties in initial lease up. No vacancies were found among the six low-income and subsidized housing developments surveyed. Waiting lists range from 14 (Georgetown Senior) up to 108 households (Arthur Place).



Redwood

Rent Levels: Upper-quartile rents range from $935 to $1,175 for one-bedroom units and $1,195 to $1,715 for two-bedroom units, yielding rents per square foot of $1.32 to $1.39 for a one-bedroom unit and $1.09 to $1.23 for a two-bedroom unit (rents at age-restricted Burr Oak not included).

Demand: A five-year projected growth of 1,289 renters from 2020 to 2025. There will be an estimated 3,727 renter households with incomes above $40,000 by 2025. DDA expects a site-specific market-rate property to support 186 to 260 units. Based on the five-year market-rate potential of 590 units, the market can absorb up to three market-rate projects over the next five years (source: *Residential Market Analysis*, Randall Gross).

There are an estimated 2,743 renter households with incomes below $40,000, representing demand for additional affordable housing in the market. The Residential Market Analysis estimates demand for 360 to 600 units within this income group. The Low-Income Tax Credit program represents the most likely vehicle to develop additional affordable housing.

Priority Locations: Downtown Area/Riverfront; Southeast; Southwest (see page 7 for map)

The downtown area has a healthy-to-vibrant mix of commercial uses and offers a tremendous opportunity to attract renters and achieve rent premiums (refer to page 34 for more detail). The riverfront area is adjacent to downtown and considered an easy and convenient walk.

For-Sale Housing

Single-Family Sales Activity: The City of Delaware had nearly 1,000 home sales from August 2019 through July 2020 (source: Delaware County Auditor).

Home Sale Price	Existing Home Resales	New Home Sales	Total Sales	Share of Sales
Less than $100,000	33	-	33	3.4%
$100,000 - $149,999	63	-	63	6.5%
$150,000 - $199,999	89	-	89	9.3%
$200,000 - $249,999	188	25	213	22.1%
$250,000 - $299,999	133	82	215	22.3%
$300,000 - $349,999	62	80	142	14.8%
$350,000 - $399,999	36	70	106	11.0%
$400,000 and Higher	35	66	101	10.5%
Total	639	323	962	100.0%
Average	$242,562	$316,219		

New Subdivision Sales Rates: The Communities of Glenross average 5.6 homes sold per month. The next highest sales rates are three homes per month among two of the lowest priced subdivisions in the city: Enclave at Adalee and Lantern Chase.

Condominium Activity: Condominium development has been limited in the past decade with construction in only two developments: Lakes at Cheshire and Landings at Glenross. Both developments are located in Delaware's southeast area and began selling in 2006/2007, during the Great Recession, with sales and ongoing construction nearly nonexistent until 2012-2013.

Since 2017, sales levels at Lakes at Cheshire have reached at least 15 each year.

Condominium Sale Prices: The peak sales at Lakes at Cheshire were 19 in 2019. The 15 new sales in 2020 ranged in price from $245,000 to $310,000. One newly constructed home is currently listed as available for $309,987, including a $140 monthly association fee.



Lakes at Cheshire

Demand: The City of Delaware is projected to have an increase of 2,454 homeowners from 2020 to 2025. Owner households of one- to two-persons represent slightly more than half the homeowners in the City of Delaware, bolstered by one-fourth homeownership by householders age 65 and older. The high share of older adult homeowners and limited condominium offerings indicates an untapped condominium market. It is DDA's opinion, development of attached ranch or villas would receive strong market response throughout the city.

Priority Locations: Southeast and Southwest

The Southeast area of the City of Delaware will continue to lead for-sale housing development bolstered by its location in the popular Olentangy School District.

Retail/Restaurants



Inventory: DDA identified nine multi-tenant shopping centers in the City of Delaware totaling 1,131,018 square feet. Forty-five percent of the shopping center space had been built since 2000. DDA identified 225 retail and restaurant businesses within the City of Delaware operating within an estimated 1.3 million square feet of retail space (shopping center and stand-alone retail).

The downtown area has 36 (37.1%) of the city's 97 restaurant and drinking places.

Occupancy Rate: The estimated shopping center retail vacancy rate in the City of Delaware is currently at 11.2%. This is considered a moderate vacancy rate, comparable to the Columbus retail market.

Lease Rates: Prevailing lease rates in the market range from $8 per square foot (triple net) for large retail spaces and $16 to $20 for typical retail stores of 1,000 to 2,000 square feet, depending on the age and quality of the space.

Demand: The City of Delaware residents will have an estimated retail trade spending potential of $700 million by 2025, approximately $100 million above current estimated retail spending, of which $55 million represents retail trade excluding automobile and online sales.

The trade area has a population 10,000 above the City of Delaware and in 2017 has current sales potential of $650 million, of which approximately $425 million are non-automobile sales. The trade area consumer spending potential is 80% of local estimated sales. The non-automobile spending potential in the trade area is projected to increase to $477 million by 2025.

The potential unmet demand for the $90 million retail spending could generate approximately an additional 210,000 square feet of occupied retail space in the City of Delaware.

Estimated restaurant sales per square foot in 2017 were $319 per square foot. This is considered a healthy overall sales per square foot amount. DDA projects restaurant spending power within the local trade area will reach $87 million by 2025. Assuming 80% of the restaurant spending occurs in the trade area, at an average of $325 per square foot, in the next five years there is potential to support another 50,000 square feet of food and beverage space in the City of Delaware.

Priority Locations: Proximate grocery-anchored shopping centers; Destination restaurant, brew pub, or brewery with tap room in Southwest can expedite a mixed-use development in the southwest area of the City of Delaware.

We recommend limited placement of additional restaurants in the downtown as there is already a vibrant mix of restaurants in the downtown area. A disproportionately high share of restaurants can adversely impact other retailers as lease rates increase and there is a lack of new space for other resident and visitor-oriented uses.

Offices

Inventory: DDA identified approximately 450,000 square feet of office space in the City of Delaware within buildings with 5,000 or more square feet. Medical office buildings represent 40% of the office market, many of which are owner-occupied buildings. Overall, the available office spaces in the city are small and, except for a flex office space, we were unable to identify any modern contiguous office space of 5,000 or more square feet.

Occupancy Rate: The overall occupancy rate of leasable office space is estimated at 80%, comparable to the regional office market.

Lease Rates: The city's largest general occupancy office development is a 31,346-square-foot multi-tenant building located at 3769 Columbus Pike. The building was constructed in 2005 and is 80% occupied with vacant space available to lease at $18.95 per square foot, full-service (all costs except cleaning and trash collection).

Modern office space is available at the PNC building in the downtown is available to lease for $20 per square foot (full-service). Older office space without parking is generally full-service in the low-to mid-teens per square foot.



3769 Columbus Pike

West Medical Center is an 23,782-square-foot medical office building at 460 W Central Avenue. The property was built in 2007 and there is currently 5,132 total square feet available for lease up to $16 per square foot, triple net (tenant responsible for all ongoing costs).

Demand: According to the Ohio Department of Job and Family Services', *2026 Job Outlook, Columbus Metropolitan Statistical Area,* the two most disproportionately low shares of businesses in the city are among the region's most rapidly growing sectors: Financial Activities and Professional/Business Services. These growing employment sectors operate in typical office environments, a limited real estate alternative in the City of Delaware. If the City of Delaware could capture 2.5% or 320 employees of the regions additional 12,782 employees projected within Financial Activities and Professional/Business Services growth, the market would support 70,000 to 80,000 square feet in the next five years.

A growing number of "white collar" employees have moved into the City of Delaware over the past two decades. With limited office space available, most residents commute outside the city to work.

COVID-19 caused a rise in office vacancy rates nationwide as many worked from home. In DDA's opinion, the office market will rebound post-COVID as people and employers feel safe to return to the workplace. According to Gensler Research Institute's *US Work From Home Survey 2020*, 88% of workers want to return to work in the office. The survey also cited that workers desire more space and designated desks for social distancing, a reversal of the prior trend of a high-density, shared-desk workspace environment that will positively impact the office market.

Priority Locations: Southeast, near restaurants; Downtown/Riverfront; Southwest (long-term, pending placement of restaurants)

Hotel

Inventory: There are four lodging properties in the City of Delaware totaling 193 rooms (excl. two B & Bs), 7.2% of Delaware County's lodging room inventory totaling 2,686.

Occupancy Rate: The overall occupancy rate is projected in the low- to mid-60 percentile, based on aggregate revenue.

Daily Rates: The City of Delaware has the oldest and lowest priced lodging stock in the county. Properties have published single-room occupancy room rates of $55 to $71.


Baymont Inn

Based on a macro-assessment of the lodging market, there is demand for a higher-priced hotel in the City of Delaware. The lack of quality lodging alternatives is resulting in visitors opting for overnight stays in Polaris and other areas outside the city.

Priority Location: Downtown

Downtown offers the greatest concentration of restaurants in the city and adjacent Ohio Wesleyan University (1,426 enrollment). The downtown is also directly accessible via US Highway 23.

Industrial

Inventory: DDA identified 6.5 million square feet of industrial buildings in the City of Delaware. The majority of industrial buildings, especially manufacturing and distribution, are owner-occupied facilities.

Occupancy Rate: The overall occupancy rate is high with just a total of 168,195 square feet of warehouse space and an estimated 18,000 square feet of flex space available to lease.

Lease Rates: The warehouse and flex space lease for $3.25 and $7 per square foot (NNN), respectively.


Symmetry II Building, flex space – 105 Innovation Drive

The new flex industrial development in the Innovation Center has attracted a wider range of business sectors than the traditional industry. Businesses in the Information and Professional, Scientific/Technical Services sectors (NAICS codes 51 and 54) can be accommodated by a higher share of office space with the flexibility for other uses in the raw warehouse area of the property. The properties along Innovation Drive are marketed as a "tech" hub targeting companies with research and development. According to the National Science Foundation, 30% of the domestic research and development spending occurs within these sectors.

Priority Locations: Flex space North of US Hwy 42; Light Manufacturing/Assembly along the Pittsburgh Drive Corridor/Airport

Employment

Labor Force: The City's resident labor force has increased approximately 60% in the past two decades totaling more than 21,000 employees and accounting for one-fifth of Delaware County's resident employment base.

The substantial growth in the local labor force was largely among residents with white-collar occupations, many of whom today must commute outside the city for work.

The modest business growth that has occurred in the manufacturing, construction, transportation and warehousing has been reliant on employers attracting more than half of its workforce from the surrounding counties.

Major Employers: The City of Delaware has 12 major employers with more than 200 employees.

FIRM	EMPLOYEES	INDUSTRY
Ohio Health (Grady Memorial Hospital)	1,500	Healthcare
Delaware County	1,091	Government
Kroger Great Lakes Distribution Center	680	Logistics
Delaware City Schools	646	Education
Ohio Wesleyan University	576	Education
Advance Auto Parts Distribution	406	Logistics
Vertiv	347	R&D/Testing
PPG Industries, Inc.	330	Manufacturing - Automotive Aftermarket Paints
City of Delaware	301	Government
Domtar/AHP	290	Manufacturing - Diaper and Hygienic Products
JEGS Automotive, Inc.	250	HQ/ Call Center/ Logistics/ Racing R&D
Liberty Castings	234	Foundry

Source: City of Delaware Economic Development

The labor force also supports major employers in the outlying areas of Delaware County, such as JPMorgan Chase & Company, Anthem BlueCross BlueShield, McGraw Hill, DHL Express, SHOWA and Optum.



Grady Memorial Hospital - Ohio Health

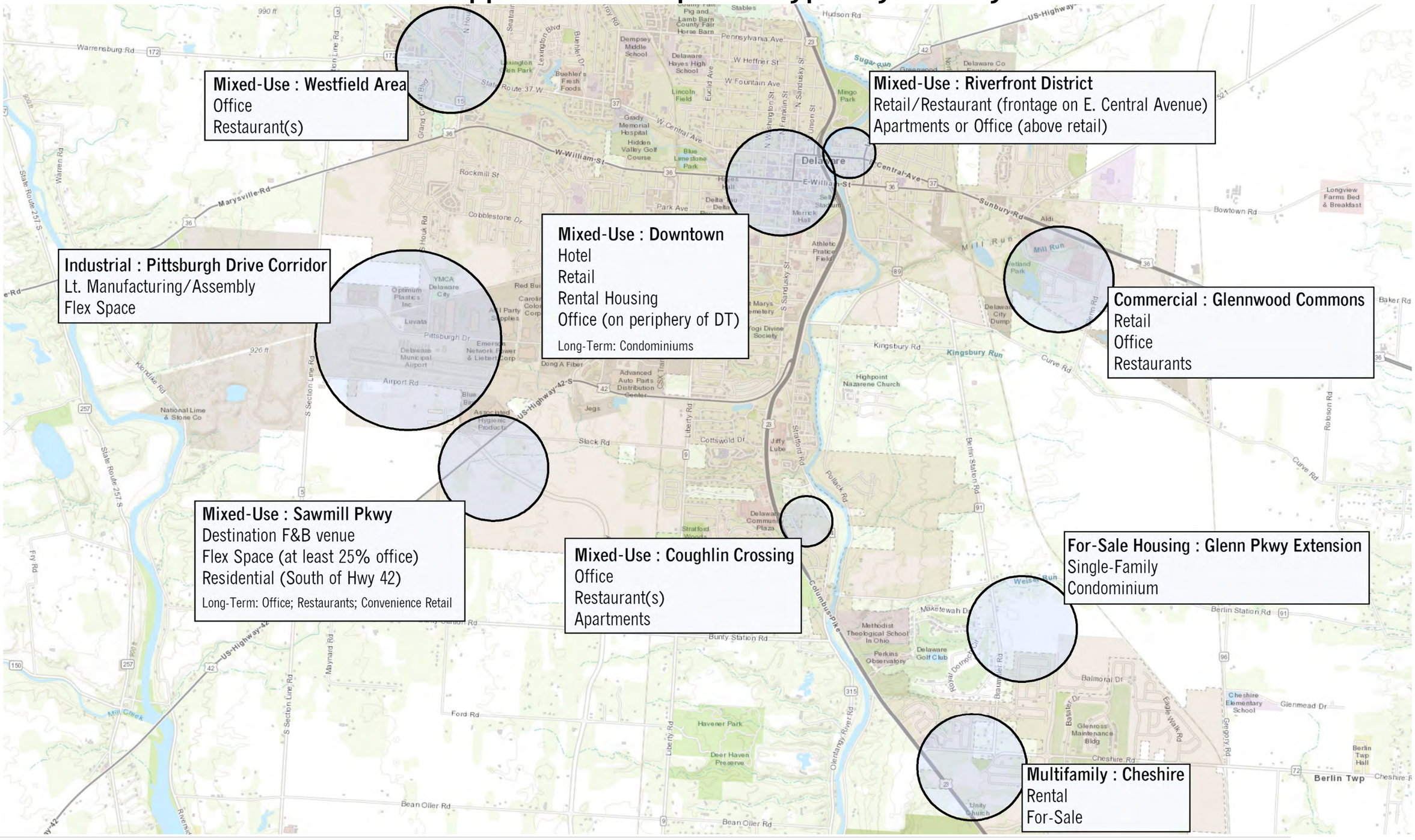
COVID 19 Impact:

Unemployment rates peaked in April 2020 at 14.1% and have continued to decline each month since to November's 3.7% rate. The total employment, as of November 2020, is down only 150 persons since Pre-COVID 19.

Overall employment in the City of Delaware and Delaware County was impacted less with fewer service-related jobs. Employment bounced back faster in the City of Delaware than the overall MSA which has a 4.9% unemployment rate (preliminary November 2020).

A map of market-supported development types by recommended priority areas follows.

Market-Supported Development Types by Priority Areas



Background

DDA is a full-service real estate market research firm providing market analyses, strategic planning and development advisory services to communities, developers and financial institutions. Pete DiSalvo, founder and president of DDA, has more than 20 years of experience in the industry and has worked in 46 states.

The objective of this report is two-fold:

1. It provides a detailed assessment and documentation of market-supported opportunities and highlights relevant market data sought by developers
2. A strategic tool for city staff charged with planning and incentivizing future development

Our methodology is based on a thorough supply/demand analyses including detailed field surveys of development types and demographic/economic factors. Recommendations for priority development locations are based on our nationwide experience and knowledge of site marketability and the economic impact of complementary uses.

Uses, Applications and Assumptions

Although this report represents the best available attempt to identify the current market status and future market trends, it is important to note that most markets are continually affected by demographic, economic and developmental changes.

The COVID 19 pandemic is unprecedented in modern-day history of the United States, exceeding health concerns and impacting local economies. Legislative mandates for temporary closures of many businesses, to curtail the spread of the virus and protect lives, comes at an economic cost. The most economically impacted industries include hotels, restaurants, retail trade, recreation and entertainment. In one way or another, many other businesses across the employment sectors are negatively impacted by COVID 19.

The length of business closures and temporary layoffs and the response in consumer confidence and spending will ultimately dictate the level of impact that COVID 19 will have on the overall economy and real estate industry. While low-interest rate financing remains available for builders and developers, it is DDA's opinion that the uncertainty of the economic toll of COVID 19 will likely create some pause and/or delays in real estate market activity.

This analysis also has been conducted with respect to a particular client's development objectives, and consequently has been developed to determine the current market's ability to support those particular objectives. For these reasons, the conclusions and recommendations in this study are applicable only to the City of Delaware.

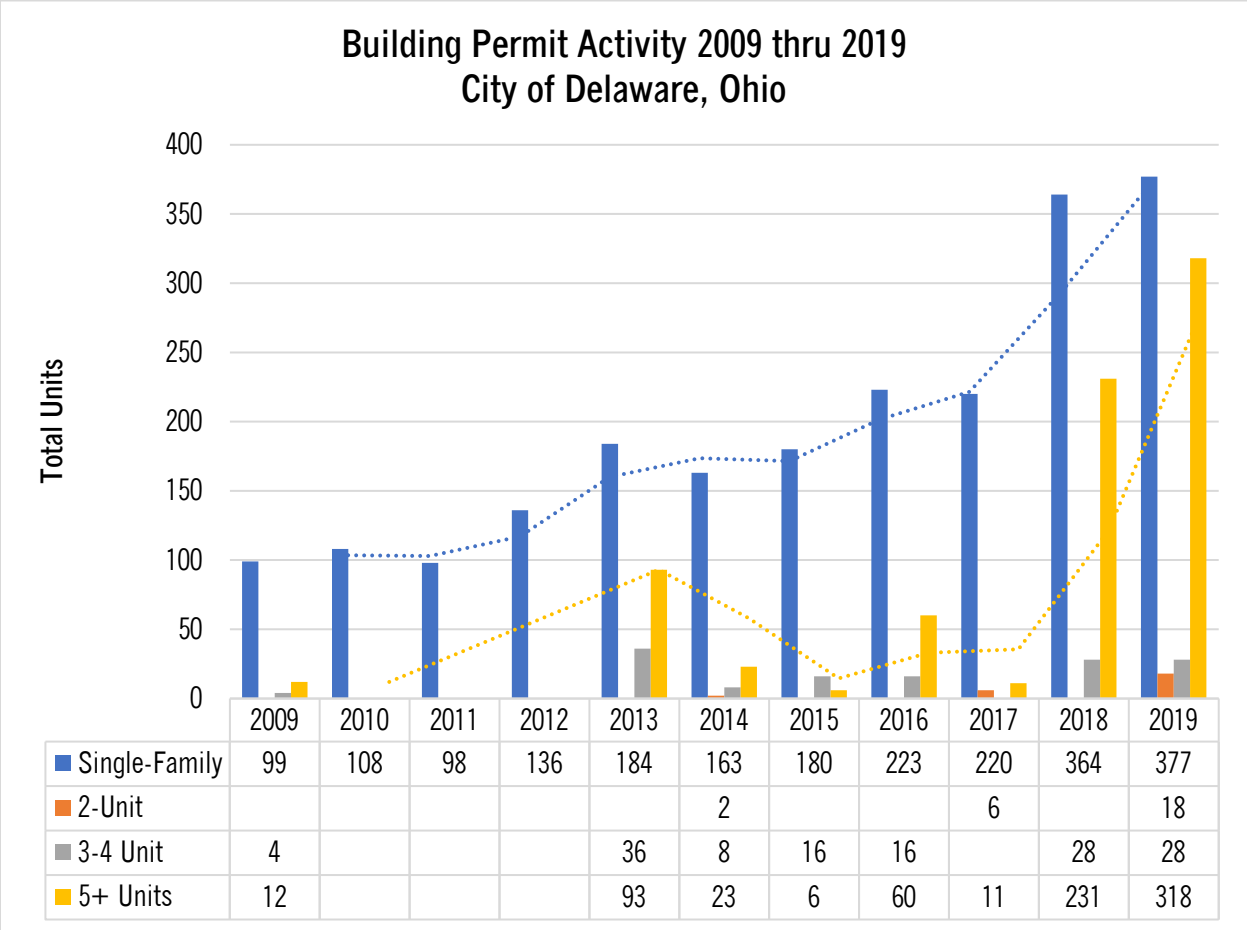
This study represents a compilation of data gathered from various sources, including the properties surveyed, local records interviews with local officials, real estate professionals and major employers and also the use of secondary demographic material. Although we judge these sources to be reliable, it is impossible to authenticate all data. The analyst does not guarantee the data and assumes no liability for any errors in fact, analysis or judgment. The conclusions contained in this report are based on the best judgments of the analysts; we make no guarantees or assurances that the projections or conclusions will be realized as stated.

II. Housing Market Conditions

Housing market conditions have been identified through analyses of rental and for-sale housing. The results of housing surveys are used to establish overall strength of the housing market and identification of gaps and opportunities.

1. Building Permit Activity

Housing construction has significantly increased from approximately 100 housing units from 2009 through 2011 to 623 to 741 in 2018 and 2019 (see chart below).



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Single-Family	99	108	98	136	184	163	180	223	220	364	377
2-Unit						2			6		18
3-4 Unit	4				36	8	16	16		28	28
5+ Units	12				93	23	6	60	11	231	318

Source: US Census Bureau, Building Permits Survey

The average annual single-family permits since 2009 are 196. Multifamily development of more than 50 units occurred in four years in the past decade.

There is limited activity for two-unit buildings, such as duplexes, attached condominiums or villas. The most recent development of two-unit buildings was at the Landings at Glenross, a condominium development in the southeast area of the city. The development also includes 28 units within seven four-unit buildings.

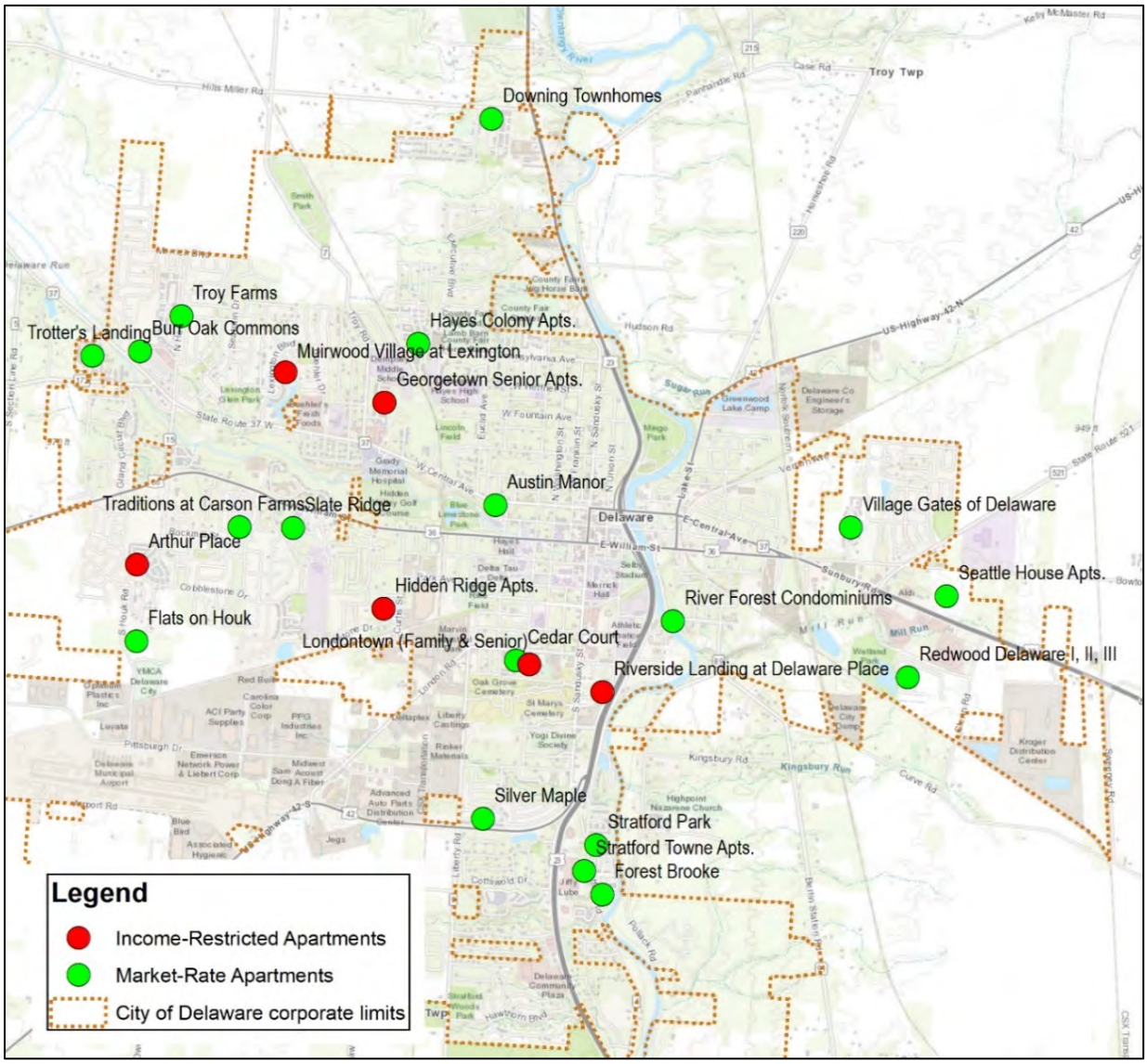
2. Multifamily Apartments

DDA has identified 28 rental housing developments in the City of Delaware of 50 or more units. Of those 28 developments, DDA staff was able to survey 24 apartment properties totaling 3,171 units. The apartment survey represents more than half the city's entire rental housing stock. At an overall 97% occupancy level, the local apartment market is strong with demand clearly limited by supply. A healthy market is considered to have an occupancy level of 95.0% which allows tenant mobility throughout the market. A distribution of units surveyed by housing type and occupancy follows.

Housing Type	Total Properties Surveyed	Total Units	Occupancy Rate
Market-Rate	18	2,648 (220 U/C)	96.1%*
Income-Restricted	6	523	100.0%
Total	24	3,171	96.8%*

*Includes vacancies from two properties in initial rent up period, Seattle House and Burr Oak Commons
U/C – Units are under construction at Seattle House and Redwood Delaware

Below is a locations map of the apartment properties surveyed in the City of Delaware.

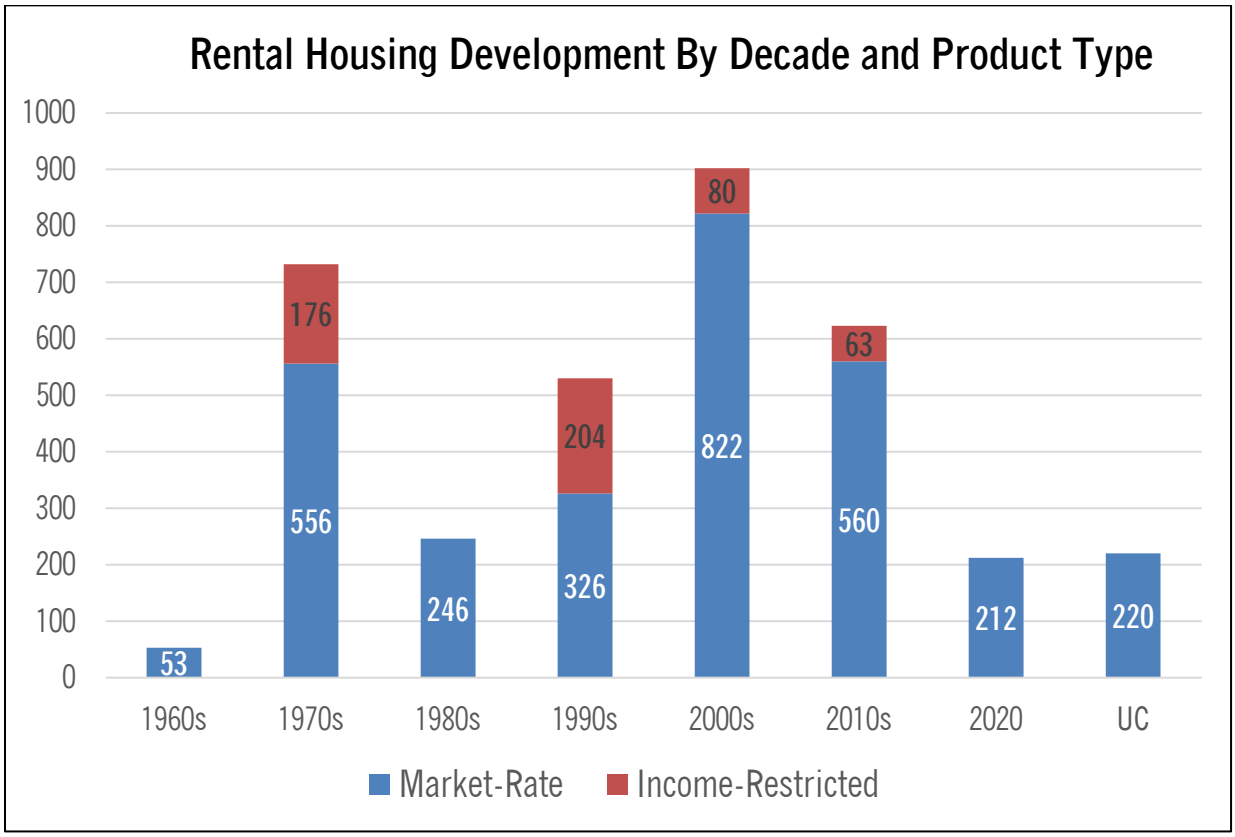


Market-rate

Two of the market-rate properties, Seattle House and Burr Oak Commons, are in the initial lease up period. Excluding these properties, the occupancy rate is 98.7%. Market-rate rental housing is considered as conventional apartments without income limit restrictions or rental assistance.

Income-restricted housing, operating under affordable housing programs, such as the Low-Income Housing Tax Credit program and HUD Section 8 program is 100% occupied and all but one property indicated lengthy waiting lists.

A distribution of rental housing development by product type and decade follows (non-participant market-rate properties totaling 347 units were included).



UC - Under Construction



The 220 under construction units are additional phases at Seattle House (120 units) and Redwood Delaware (100 units). The first available units at the second phase of Seattle House are expected in December 2020 and Redwood Delaware has a third phase in the initial phases of construction with units anticipated to open in September 2021 (see photo on right). A planned 178-unit apartment development in Coughlin Crossing, named Coughlin's Crossing Apartments, was recently approved by the City of Delaware. The project will include 14 buildings with apartments ranging in size from 620 square feet for a one-bedroom unit to 1,241 square feet for two-bedroom units. The proposed development will include a clubhouse and pool. Rent levels and timeline for construction were not available.

A summary of the market-rate properties surveyed in descending order of year built follows.

Project Name	Street Address	Year Open	Total Units	Vacancy Rate
Austin Manor	95 Elizabeth St	1923/1988	60	>5%
Cedar Court	159 London Rd	1969	53	0.0%
Stratford Towne Apts.	1345 Middlesex Ln	1972	128	0.0%
Olentangy View I & II	1241 Rivercrest Dr	1972/1997	110	Not Available
Georgetown Apartments	80 Georgetown Dr	1975	51	Not Available
River Forest Condominiums	90-200 Hayes Rd	1976	56	0.0%
Downing Townhomes	110 S Downing St	1977	54	0.0%
Hayes Colony Apts.	470 Heritage Blvd	1978	207	0.0%
Willows Apartments	2228 Bruce Rd	1979	134	Not Available
Rolling Meadows	105 Rolling Meadows Dr	1980	52	Not Available
Silver Maple	278 Silver Maple Dr	1992	128	>5%
Slate Ridge	50 New Market Dr	1993	76	0.0%
Forest Brooke	1493 Forest Brook Way	1998	72	<5%
Stratford Park	28 Sterling Ridge Dr	2000	79	0.0%
Trotter's Landing	1 Trotter's Cir	2000	218	>5%
Village Gates of Delaware	1 Village Gate Blvd	2000	221	0.0%
Troy Farms	124 Lippazon Way	2003	304	0.0%
Redwood Delaware I, II, III	20 Bur Reed Rd	2014	235 (100-UC)	0.0%
Traditions at Carson Farms	437 Sunburst Dr	2014	157	0.0%
Flats on Houk	1000 Solomon Sq	2019	168	<5%
Burr Oak Commons	90 Burr Oak Dr	2020	92	Initial Rent Up
Seattle House Apts.	1 Kerry Park Cir	2020	120 (120-UC)	Initial Rent Up
		Total	2,995 (220 – UC)	96.1%

UC - Under construction

Estimated vacancies by unit type, excluding properties in rent up phase, range from 1.1% in three-bedroom units up to 2.0% among one-bedroom units. No studio or efficiency units were identified in the City of Delaware. Market-rate rents vary widely from the older lower-quality 1960s/1970s apartments to the more modern apartments listed below.

	Collected Rents		Upper Quartile Rents	
Bedroom Type	Range	Average	Range	Properties
One-Bedroom	$625 - $1,175 (Burr Oak - $1,915)	$912	$935 - $1,915	Seattle House; Flats on Houk; Burr Oak Commons
Two-Bedroom	$650 - $1,715 (Burr Oak - $2,624)	$1,141	$1,195 - $2,624	Traditions at Carson Farms; Flats on Houk; Redwood Delaware; Burr Oak Commons; Troy Farms
Three-Bedroom	$860 - $1,486	$1,144	$1,195 - $1,486	Village Gates of Delaware; Traditions at Carson Farms; Troy Farms

The newer higher-priced properties in Delaware are on the eastern and western edges of the corporate limits. There are higher-priced remodeled rental alternatives in upper floors of buildings in downtown within the upper-quartile rent range, such as Sandusky Lofts, however, there are few of these units.



Sandusky Lofts

The rent per square foot among properties with upper-quartile rents, excluding Burr Oak Commons, ranges from $1.32 to $1.39 for a one-bedroom unit and $1.09 to $1.23 for a two-bedroom unit.

Three-bedroom single-family rentals in the area have been the high-end three-bedroom rental alternative in the market achieving monthly rents as high as $2,500. According to the five-year 2014-2018 American Community Survey, single-family rentals constitute 17.7% of the rental housing stock in Delaware. There are an estimated 1,062 detached single-family rentals in the City of Delaware (margin of error +/- 236).

Burr Oak Commons is a high-priced age-restricted community with large one-bedroom/1.5-bath and two-bedroom/2.5-bath units and attached garages. The rental rates were listed separately because they are anomalies to the remaining conventional rental housing market.

Income-Restricted

No vacancies were found among the six low-income and subsidized housing developments surveyed. Waiting lists range from 14 (Georgetown Senior) up to 108 households (Arthur Place).

A summary of the federally subsidized apartment properties follows.

Project Name	Program Type	Year Open	Total Units	Length of Waiting List
Londontown (88 units age-restricted)	HUD Section 8	1971	126	80
Georgetown Senior Apts.*	HUD Section 8 & LIHTC	1977	50	14
Muirwood Village at Lexington	Tax Credit	1991	144	17
Hidden Ridge Apts.	Tax Credit & HOME	1998	60	Not disclosed
Arthur Place	Tax Credit (28 HCV)	2009	80	108
Riverside Landing at Delaware Place*	Tax Credit	2013	63	29
		Total	523	

*Age-restricted

The rents at Londontown and Georgetown Senior Apartments are based on 30% of the resident's adjusted income. The collected monthly rents among the Tax Credit properties range from $496 to $891 for the one-bedroom units to $588 to $976 for two-bedroom units, depending on the income limitations ranging from 35% to 60% of area median household income (AMI). The Tax Credit rents at the 60% AMI level exceed rents achieved by market-rate properties built from 1993 to 2003.

The 60% AMI income limits are high enough that persons can afford many of the older market-rate properties in the area. A summary of the 2020 60% income limits by household sizes are listed below:

- One-person - $35,400
- Two-person - $40,440
- Three-person - $45,480

A distribution of renter household by income can be found in Section IV of this report.

3. For-Sale Housing

The City of Delaware had nearly 1,000 home sales from August 2019 through July 2020 (source: Delaware County Auditor).

One-third of the home sales were from newly constructed homes with the remaining resales of existing homes.

Home sales in the $200,000s accounted for 44.4% of all home sales. The next largest home sale price category was $300,000 to $350,000. A summary of home sales by price point, type and share of sales follows.



Home Sale Price	Existing Home Resales	New Home Sales	Total Sales	Share of Sales
Less than $100,000	33	-	33	3.4%
$100,000 - $149,999	63	-	63	6.5%
$150,000 - $199,999	89	-	89	9.3%
$200,000 - $249,999	188	25	213	22.1%
$250,000 - $299,999	133	82	215	22.3%
$300,000 - $349,999	62	80	142	14.8%
$350,000 - $399,999	36	70	106	11.0%
$400,000 and Higher	35	66	101	10.5%
Total	639	323	962	100.0%
Average	$242,562	$316,219		

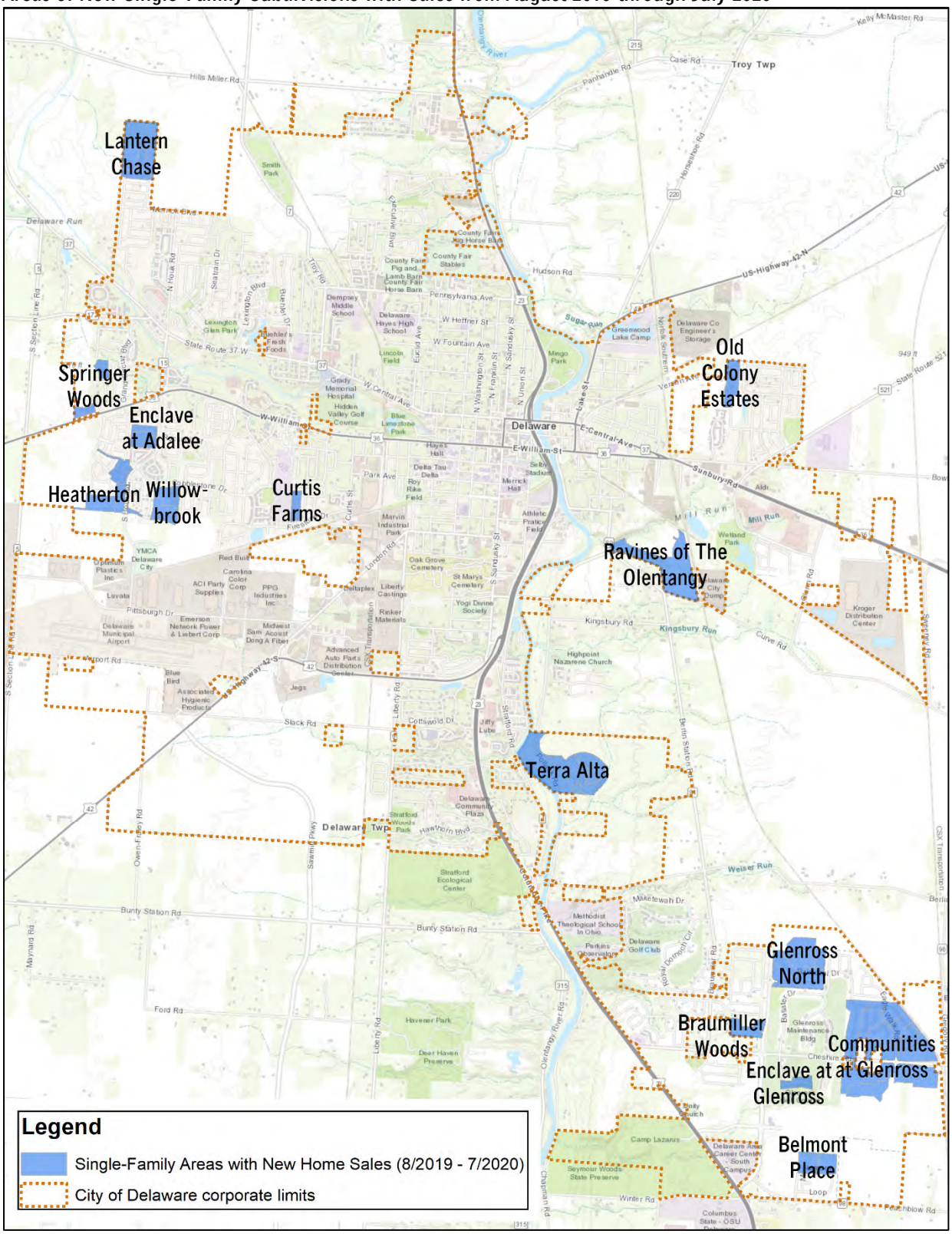
Source: Delaware County Auditor

New home sales occurred in 14 new single-family subdivisions in the City of Delaware. Of the 323 new home sales, 119 (36.8%) occurred in five subdivisions in the southeast portion of the city in the Olentangy School District:

- Glenross North
- Communities at Glenross
- Braumiller Woods
- Belmont Place
- Enclave at Glenross

The subdivision in the southeast area of the city represents the highest priced housing in the city. A map of these five subdivisions and other new subdivisions within the City of Delaware follows.

Areas of New Single-Family Subdivisions with Sales from August 2019 through July 2020



Note: Only active sections and phases within each subdivision are shown.

The Communities of Glenross has the widest range of home sale prices with more than $250,000 separating the lowest and highest prices. The subdivision has a higher than typical sales rate with an average of 5.6 homes sold per month. The next highest sales rates are among two of the lowest priced subdivisions in the city: Enclave at Adalee and Lantern Chase. The two lower-priced subdivisions average approximately three home sales per month and offer some of the smallest lot sizes averaging 0.11 to 0.18 acre. The average new home lot is about one-fourth an acre.



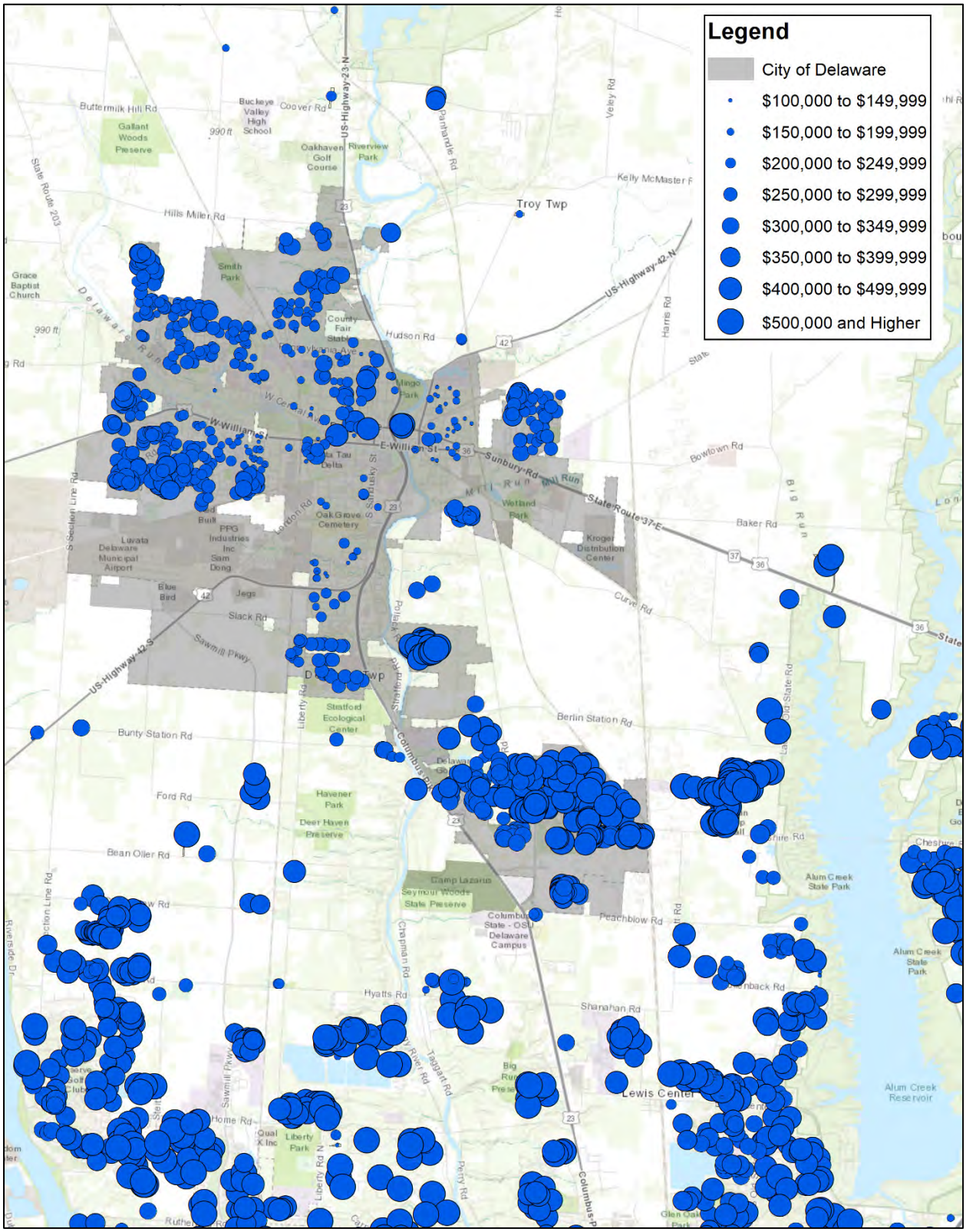
New Home Sales
Subdivisions
City of Delaware
August 2019 through July 2020

Subdivisions, Section or Phase	Total Homes Sold	Average Lot Size (Acres)	Home Sale Prices	Average Home Sale Price
Enclave at Adalee, PH 1 & 2	40	0.11	$200,000 - $275,910	$248,834
Lantern Chase, PH 2, Sec 6	32	0.18	$239,015 - $377,261	$294,208
Ravines of the Olentangy, Sec 1	22	0.22	$262,873 - $328,866	$294,324
Heatherton, PH 4, 7 & 8	31	0.21	$282,855 - $365,870	$297,053
Curtis Farms, PH 4	6	0.18	$254,130 - $347,310	$300,473
Old Colony Estates, PH 2	23	0.20	$350,590 - $362,765	$315,942
Willowbrook, Sec 2, PH 1, 2A & 2B	20	0.26	$272,640 - $406,266	$341,733
Springer Woods, PH 1 & 3	11	0.22	$272,780 - $424,563	$348,533
Belmont Place, Sec 4 & 5	21	0.21	$307,970 - $406,115	$363,418
Communities of Glenross, Sec 5 – 15	68	0.23	$298,550 - $555,455	$397,574
Braumiller Woods Sec 3	5	0.27	$358,257 - $459,576	$407,288
Terra Alta, Sec 1	19	0.31	$352,005 - $485,390	$418,753
Glenross North, Sec 1 & 2	22	0.33	$375,890 - $531,715	$427,094
Enclave at Glenross	3	0.32	$460,000 - $545,365	$497,080
	323	0.22	$200,000 - $555,455	$316,219

Source: Delaware County Auditor
Note: Parts of "PTs" of subdivision sections has been omitted.
PH – Phase
Sec – Section

As the dot density map on the following page illustrates, the City of Delaware offers a more affordable housing stock than the area, including southern Delaware County. In fact, according to the Columbus Realtors' Multiple Listing Service (MLS), the average home sale price for a home in the Delaware City School District in September 2020 was $249,045 compared to $447,896 in the Olentangy School District.

Home Sale Price Levels By Area
City of Delaware and outlying areas in Delaware County
August 2019 through July 2020



Condominiums

DDA identified 13 condominium developments in the City of Delaware totaling 747 units. Nearly all condominium developments were completed in multiple phases. Village at Lehner Farms is the largest condominium development in the city and was built by Dominion Homes at the peak of national homeownership rates. The development is a Traditional Neighborhood Development (TND) with modest-sized detached homes with detached garages accessed from alleys. The low home sale prices and financial incentives attracted many first-time homebuyers. Homes in Village at Lehner Farms remain affordable and recently sold in the $150,000 to $180,000 price range.

A summary of condominium development in the City of Delaware by development name, year(s) built and total units follows (a locations map can be found on the following page).

Condominium Development	Year(s) Built	Total Units
Landings at Glenross	2007 – 2018	53
Lakes at Cheshire	2006 – 2020	106
Village at Shelbourne Forest	2005	36
Village at Willowbrook Farms	2004 – 2006	64
Village at Lehner Farms	2003 – 2005	213
Trillium Condos at Willow Run	1999 – 2009	58
Timmons Woods	1997 – 2007	34
Sunnyview Village	1996 – 1998	34
Hanover Court	1994 – 2002	40
Bennington Cove	1990 – 1993	20
Country Meadows	1980 – 1981	16
Hayes Colony	1972	41
River Oaks	1972	32
	Total	747

Note: Condominium developments with high shares of rentals and those less than 16 units were omitted from the summary. The total units are estimated based on parcel data from the Delaware County Auditor.

Condominium development has been limited in the past decade with construction in only two developments: Lakes at Cheshire and Landings at Glenross. Both developments are located in Delaware's southeast area and began selling in 2006/2007, during the Great Recession, with sales and ongoing construction nearly nonexistent until 2012-2013. A summary of both condominium developments follows.

<u>Lakes at Cheshire</u>

Lakes at Cheshire has 106 attached units (as of date of report) and is located near the northeast quadrant of Cheshire Road and Columbus Pike (US Hwy 23). The property includes a 2,300-square-foot community building and outdoor pool. The development includes four- to nine-unit attached condominium buildings. Since 2017, sales levels have reached at least 15 each year. The peak sales were 19 in 2019. The 15 new sales in 2020 ranged in price from $245,000 to $310,000. One newly constructed home is currently listed as available for $309,987, including a $140 monthly association fee.

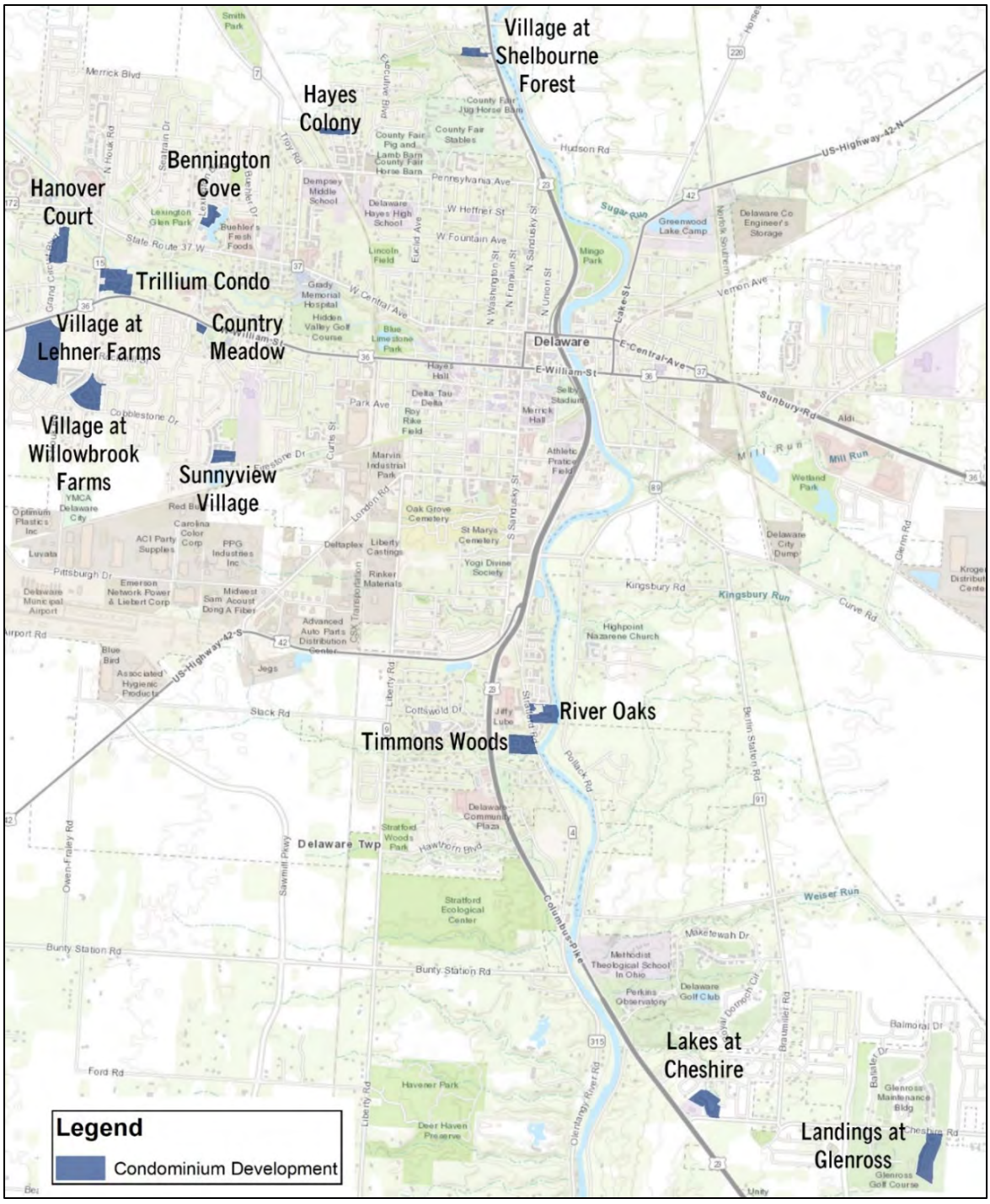


Lakes at Cheshire

Landings at Glenross

The development includes 53 homes situated adjacent fairways of Glenross Golf Club. The developer offered a mix of housing types with 15 detached homes, five duplexes, and seven four-plexes. The last seven units were sold in 2018 ranging in price from $313,340 to $350,000.

Condominium development largely started on the near west side of the city (Hayes Colony, Bennington Cove and Country Meadow), continued on the far west side (Trillium, Village at Lehner Farms and Willowbrook Farms), with the last development in the southeast area (Lakes at Cheshire and Landings at Glenross). A map of the condominium developments is below.



Commercial market conditions have been identified through analyses of retail and office space. The results of commercial surveys and business inventories are used to establish overall strength of the commercial market and identification of gaps and opportunities.

1. Retail Shopping Centers

DDA identified nine multi-tenant shopping centers in the City of Delaware totaling 1,131,018 square feet. Forty-five percent of the shopping center space had been built since 2000. A summary of the shopping centers, in descending order by overall size, follows.

Shopping Center	Year Built	Anchor Tenant(s)	Total Square Feet
Glennwood Commons	2008	Meijer; Kohl's	388,196
Delaware Community Plaza	1993	Kroger; Wal-Mart	244,771
Delaware Square	1985-1989	Goodwill	118,911
Westfield	2000	Kroger	115,121
800 W Central (fka Buehler's)	1986	-	94,660
Georgetown Centre	1968	-	64,551
Delaware Shopping Center	1972-1980	Big Lots (early 2021)	59,613
Troy Road	1960-1961	-	38,148
Shoppes @ Central Avenue	2018	-	7,047
		Total	1,131,018

Note: Outparcel buildings with a single tenant are not included in the total. Small strip centers with less than 5,000 square feet of retail or restaurant tenants not included.

Shopping centers of more than 100,000 square feet have an anchor tenant. Big Lots, currently located in the northernmost area of the city, has plans to move to the Delaware Shopping Center in early 2021. The anchor tenants occupy 45% of the overall shopping center space, with the exception of Delaware Community Plaza and Delaware Shopping Center, are owner occupants. The remaining 55% of retail space is leased. Based on DDA's review of broker listings, in-person observations and interviews with local brokers and owners, the estimated shopping center retail vacancy rate in the City of Delaware is currently at 11.2%. This is considered a modest vacancy rate, comparable to the the Columbus retail market. Discount Fashion Warehouse (DFW) will be replacing the space vacated by Office Max in Glennwood Commons.

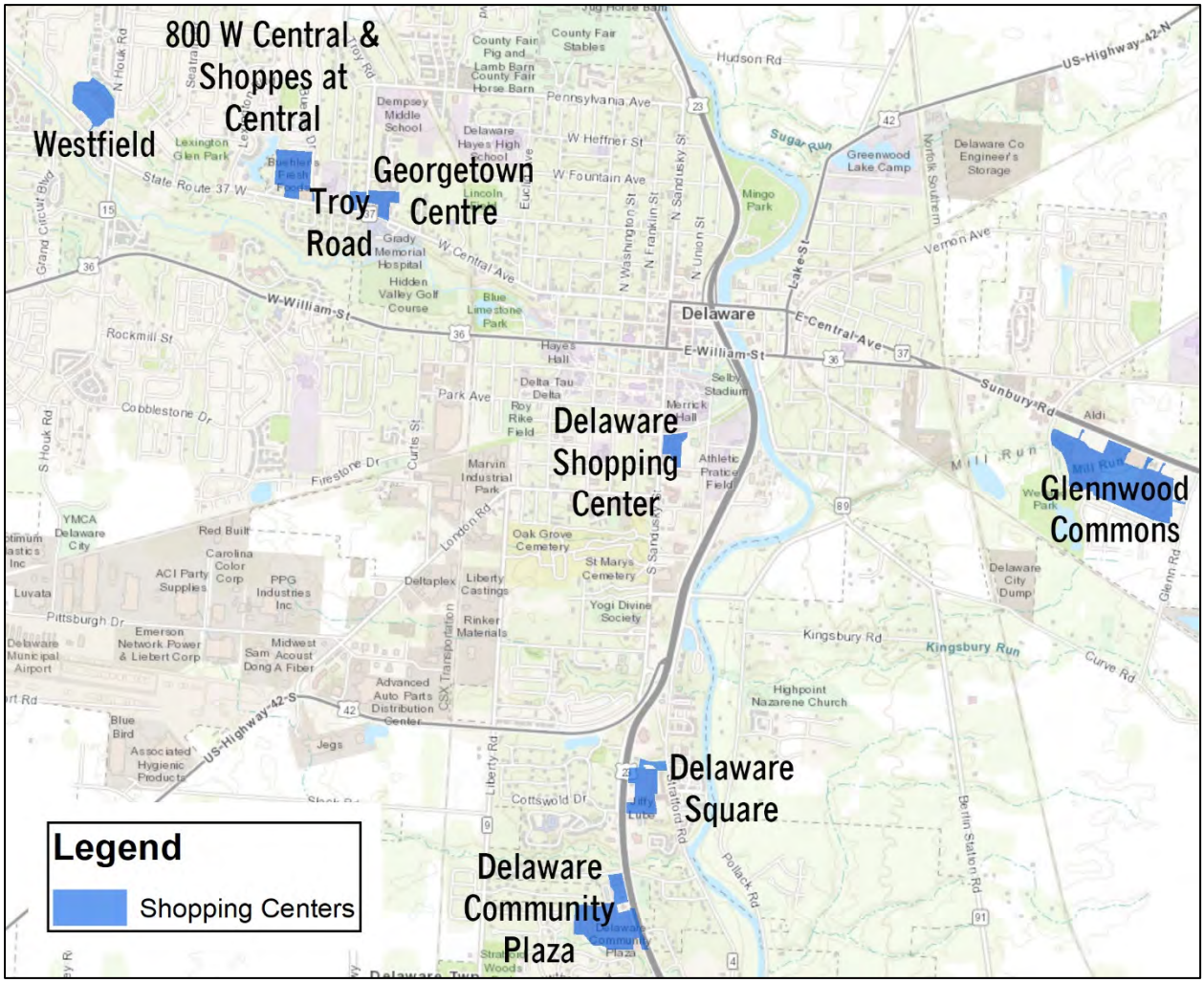


DFW is moving into a space at Glennwood Commons, formerly occupied by Office Max

The table below shows gross leasable space and availability by shopping center.

Shopping Center	Gross Leasable Square Feet	Available Square Feet		Vacancy Rate
		Store Sizes	Total	
Delaware Community Plaza	148,753	1,500 - 5,800	27,543	18.5%
Glennwood Commons	107,932	1,400 - 6,000	26,640	24.7%
800 W Central (fka Buehler's)	94,660	-	0	0.0%
Delaware Square	74,046	-	0	0.0%
Georgetown Centre	64,551	800 - 4,929	10,009	15.5%
Delaware Shopping Center	59,613	-	0	0.0%
Troy Road	38,148	1,000 - 1,250	2,350	6.2%
Westfield	33,625	2,800	2,800	8.3%
Shoppes @ Central Avenue	7,047	1,200	1,200	17.0%
Total	628,375	800 - 6,000	70,542	11.2%

The newest and largest shopping centers in the area are Delaware Community Plaza, Westfield and Glennwood Commons, each on the periphery of the city limits (see map below).



Prevailing lease rates in the market range from $8 per square foot (triple net) for large retail spaces and $16 to $20 for typical retail stores of 1,000 to 2,000 square feet, depending on the age and quality of the space.



Outparcel opportunities exist for 2.4 acres at Delaware Community Plaza and approximately 16 acres at Glennwood Commons. Glennwood Commons has another nine vacant acres situated between the two retail anchors, currently owned by Home Depot (see yellow boundaries of property on map). Home Depot has owned the property since 2007. Before COVID-19, there were plans to develop 96,000 square feet of additional retail space on the Home Depot property to accommodate Hobby Lobby, TJ Maxx, Ulta Beauty and Five Below. Plans also included an additional 12,540 square feet of space for a future tenant. Building permits were retracted at the start of COVID-19.

2. Retail Goods & Services/Restaurant Business Profile

DDA identified 225 retail and restaurant businesses within the City of Delaware operating within an estimated 1.3 million square feet of retail space. A distribution of businesses by type (NAICS code), total stores and store space follows.

Retail/Restaurant Group	NAICS Code	Total Stores	Store Size (Square Feet)	
			Total	Share
Furniture & Home Furnishings	442	6	49,323	3.8%
Electronics & Appliance	443	4	12,503	1.0%
Bldg Materials, Garden Equip & Supply	444	7	57,644	4.4%
Food & Beverage	445	8	360,630	27.5%
Health & Personal Care	446	12	58,147	4.4%
Gas Station	447	13	37,781	2.9%
Clothing & Clothing Accessories	448	6	14,890	1.1%
Sporting Goods, Hobby, Book & Music	451	8	15,800	1.2%
General Merchandise	452	7	279,551	21.3%
Miscellaneous	453	16	53,843	4.1%
Food Services & Drinking Places	722	97	257,037	19.6%
Personal Care Services	81	41	116,618	8.9%
	Total	225	1,313,767	100.0%

Sources: DDA, www.google.com, broker listings, Delaware County Auditor and Health Departments

Food and beverage and general merchandise establishments, many of which are anchor tenants in the shopping centers, such as Kroger and Meijer, account for nearly half of the space occupied by retailers and restaurants in the marketplace.

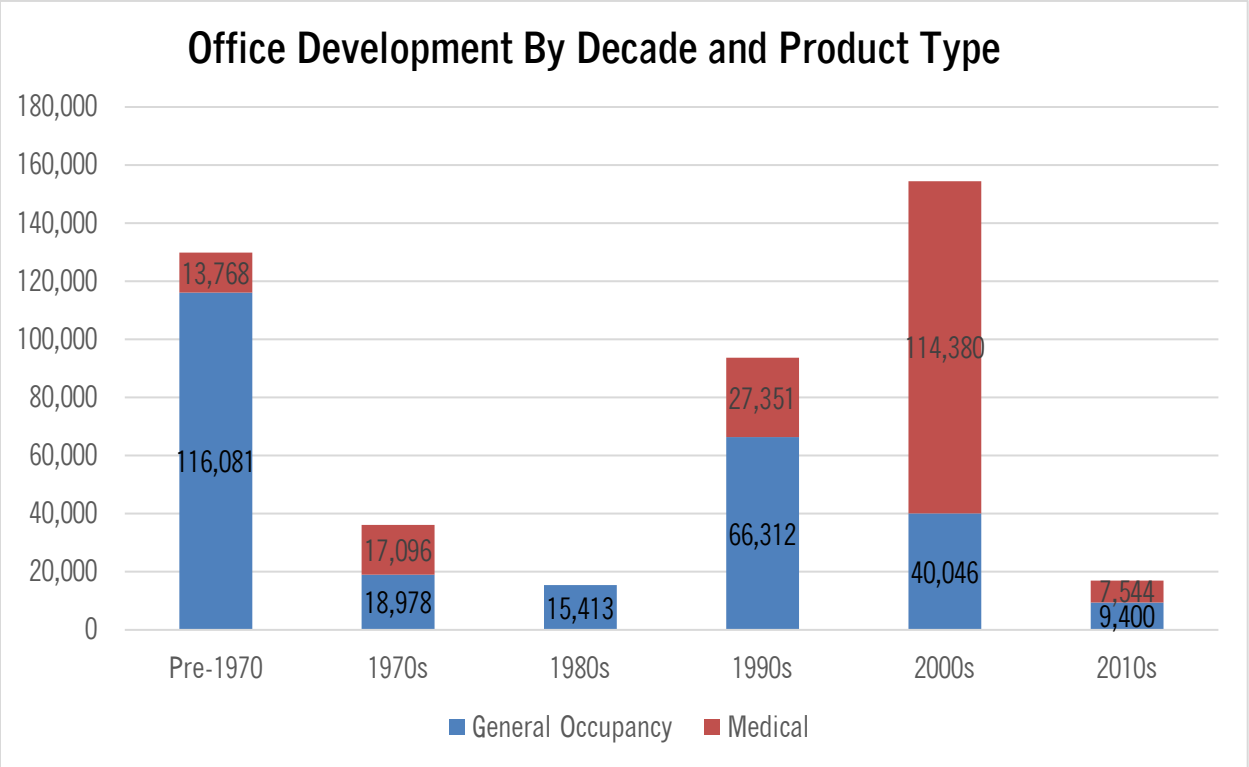
The downtown area has 36 (37.1%) of the city's 97 restaurant and drinking places.

3. Office Space

DDA identified approximately 450,000 square feet of office space in the City of Delaware within buildings with 5,000 or more square feet. Medical office buildings represent 40% of the office market, many of which are owner-occupied buildings.

As the table below shows, medical office space has dominated the office market since 2000, led by Ohio Health's 67,833-square-foot Delaware Medical Campus at the south end of the city limits.





Source: Delaware County Auditor, Loopnet, Columbus Board of Realtors, Jobs Ohio and DDA

The overall vacancy rate of leasable office space is estimated at 20%, comparable to the regional office market. Overall, the available office spaces in the city are small and, except for a flex office space, we were unable to identify any modern contiguous office space of 5,000 or more square feet. Therefore, the current office market cannot adequately accommodate businesses with approximately 20 or more employees.

The city's largest general occupancy office development is a 31,346-square-foot multi-tenant building located at 3769 Columbus Pike. The building was constructed in 2005 and is 80% occupied with vacant space available to lease at $18.95 per square foot, full-service (all costs except cleaning and trash collection). The property is in the southern end of the City of Delaware more than two miles from the nearest restaurants, except Glenross Golf Club. It is DDA's opinion that while tenants of the property benefit from ease of access to the location, the low occupancy is reflective of the remote location from available area amenities.



3769 Columbus Pike

Most older office buildings are in the downtown area. CoHatch's adaptive reuse of an historic 9,400-square-foot Old Gazette building in the downtown area is the city's newest office property. The cowork space, Newstand, has approximately 20 private offices with four listed as available (source: delawaremeansbusiness.com).

Aside from some newly renovated office space downtown, such as the Kern Building, the most modern conventional office building in the downtown is the PNC Bank building at 40 N Sandusky Street. The second and third floors of the building include 13,650 square feet of office space. The third floor is 100.0% occupied and the second floor has two small suites of 900 and 1,000 square feet vacant and available to lease for $20 per square foot (full-service). Older office space without parking is generally full-service in the low- to mid-teens per square foot.



40 N Sandusky Street, ground floor bank and upper floor offices

Delaware Commerce Center is an example of an office development including several office and flex-office buildings totaling 28,000 square feet (includes warehouse space). A total of 6,000 square feet are available for lease at $13.75 per square foot, modified gross. Two spaces, 2,400 and 3,600 square feet, are available and can be combined. The larger space includes a drive-in bay area connected to the warehouse/storage/ assembly areas of the building.



Delaware Commerce Park

West Medical Center is an 23,782-square-foot medical office building at 460 W Central Avenue. The property was built in 2007 and there is currently 5,132 total square feet available for lease ranging from $10 to $16 per square foot, triple net (tenant responsible for all ongoing costs). The lower-priced lease is for a lower level space in the building.

4. Lodging

A hotel market feasibility study was not included within the initial scope of analysis. However, we are providing this section simply to identify general characteristics of lodging alternatives and market observations based on DDA's experience with lodging in similar markets. Furthermore, COVID-19 has made conducting a survey of properties and identifying demand drivers challenging. A survey of properties and potential users, post COVID-19, will be required to accurately assess the depth of the market for additional lodging.

There are four lodging properties in the City of Delaware totaling 193 rooms, 7.2% of Delaware County's lodging room inventory totaling 2,686. The Polaris Area in south Delaware County includes 17 properties representing all the chain scale categories or price points, except Luxury. A summary of each of the lodging properties in ascending order of year open by area follows.

Area	Property Name	Year Open	Chain Scale	Rooms
City of Delaware	Pacer Inn & Suites	1950	Independent/Economy	34
	Travel Inn	1970	Independent/Economy	31
	Quality Inn & Suites Delaware	1995	Midscale	57
	Baymont Inn & Suites Delaware	1997	Midscale	71
			Total Rooms	*193**
Berkshire Township/ Sunbury	Hampton Inn	1996	Upper Midscale	60
	Holiday Inn Express & Suites	1998	Upper Midscale	61
	Travelodge Sunbury	1999	Economy	61
			Total Rooms	*182*
Polaris Area/ Columbus	Four Points by Sheraton	1998	Upscale	100
	Extended Stay America	1998	Economy	123
	Comfort Inn North Polaris	2000	Upper Midscale	93
	Homewood Suites by Hilton	2002	Upscale	92
	Nationwide Hotel & Conference Center	2002	Independent	192
	Hilton Garden Inn Columbus Polaris	2005	Upscale	118
	Candlewood Suites Polaris	2006	Midscale	122
	Hampton by Hilton Inn & Suites	2008	Upper Midscale	118
	Hilton Columbus Polaris	2008	Upper Upscale	252
	Cambria Hotels Columbus-Polaris	2009	Upscale	125
	Fairfield Inn & Suites Columbus Polaris	2009	Upper Midscale	125
	Holiday Inn Express & Suites	2011	Upper Midscale	104
	Residence Inn Columbus Polaris	2014	Upscale	104
	Staybridge Suites Columbus Polaris	2017	Upscale	119
	Renaissance Columbus Westerville	2018	Upper Upscale	222
	Drury Inn & Suites & Suites	2019	Upper Midscale	187
	Home2 Suites by Hilton	2021	Upper Midscale	115
			Total Rooms	*2,311*

Sources: Smith Travel Research (STR); Delaware County Auditor
*Does not include the two three-room bed and breakfast properties

The City of Delaware has the oldest and lowest priced lodging stock in the county. Properties have published single-room occupancy room rates of $55 to $71. The two oldest properties, Pacer and Travel Inns, are motor lodge style with exterior entrances to each room. Pacer appears well maintained and includes a 120-capacity meeting space. Baymont Inn, formerly Best Western, is a two-story walkup hotel (no elevator).



Pacer Inn & Suites

The four lodging properties generated $2.7 to $2.9 million a year from 2017 to 2019 (source: City of Delaware). Based on revenues and published rates, DDA estimates that the overall occupancy rate is in the low- to mid-60 percentile. This rate is indicative of strong lodging demand, despite the limited offerings.

City of Delaware
Hotel Bed Tax and Revenue

Year	Bed Tax (3%)	Revenue
2017	$82,835	$2,761,167
2018	$85,748	$2,858,267
2019	$79,740	$2,658,000

The City of Delaware, notably, has no options in the moderate to higher-priced Upper Midscale or Upscale hotels. Upper Midscale hotels, such as Holiday Inn Express or Fairfield Inn, are in many smaller markets, such as Marion and Marysville, Ohio. Visitors are commonly referred to the Polaris area for an overnight stay.

The Polaris area hotels benefit from proximity and direct access to Interstate 71, a concentration of corporate office users and a wide variety of traveler services, including restaurants, shopping and entertainment. From 2017 through 2019, Upper Midscale and Upscale properties in the Polaris area have operated at high occupancy levels and Average Daily Rates (ADRs).

Polaris Area
Upper Midscale & Upscale Properties

Year	Total Rooms	Occupancy Rate*	ADR*
2017	1,668	67.6%	$131.43
2018	1,787	67.3%	$126.81
2019	2,009	70.1%	$127.17

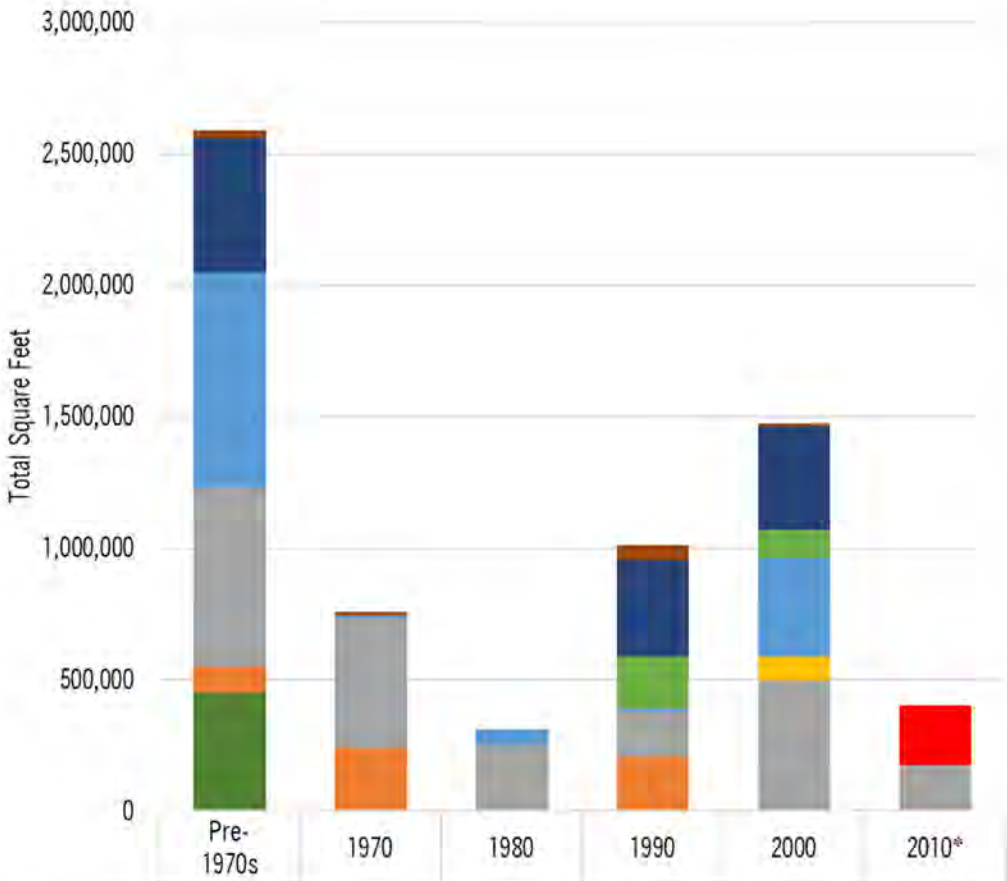
Note: DDA assumes the table is for a competitive set and not the overall market.
*Source: The Witness Group

All the hotels in Berkshire Township/Sunbury are next to each other situated at the northwest quadrant of the I-71/Hwy 36 interchange and have published rates from $79 to $96.

Based on reported countywide tax revenue, Delaware County had lodging revenue in 2017 and 2018 of $52.4 to $59.0 million. In a 65% occupancy scenario, properties in the overall county generate approximately 610,000 room nights and an ADR of $97. Excluding the City of Delaware properties, the estimated ADR is $105. As a comparison, the Columbus market had a 66.5% occupancy rate and a $106.61 ADR in 2019 (source: Experience Columbus).

DDA identified 6.5 million square feet of industrial buildings in the City of Delaware. The majority of industrial buildings, especially manufacturing and distribution are owner-occupied facilities. A total of 168,195 square feet of warehouse space and an estimated 18,000 square feet of flex space is available to lease. The warehouse and flex space lease for $3.25 and $7 per square foot (NNN), respectively. A distribution of industrial buildings by type, square footage and decade built follows.

Distribution of Industrial Buildings, City of Delaware



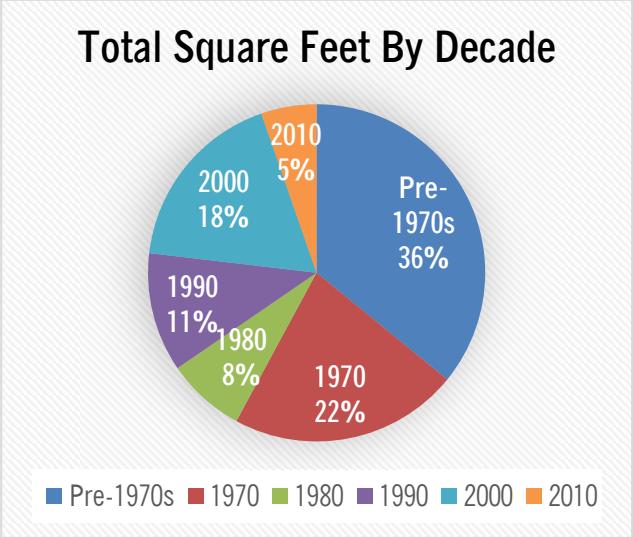
	Pre-1970s	1970	1980	1990	2000	2010*
Flex (25% or more office)						228,600
Small Shops (Less than 20% office)	29,253	13,076		58,208	12,000	
Distribution	511,877			362,100	393,394	
Warehouse (6% to 20% office)				198,811	103,837	
Warehouse (less than 6% office)	819,459	12,700	61,129	11,944	374,140	
Lt. Manuf/Assembly (10% to 20% office)					90,000	
Lt. Manuf/Assembly (10% or less office)	680,188	490,834	242,498	169,501	498,228	175,532
Med. Manuf/ Assembly	99,626	242,919	6,480	208,162		
Foundry/ Heavy Manuf.	450,816					

Note: Totals do not include cold storage, food processing, aviation facilities and other non-classified industrial structures.
Sources: Delaware County Auditor, City of Delaware, Broker Listings and DDA

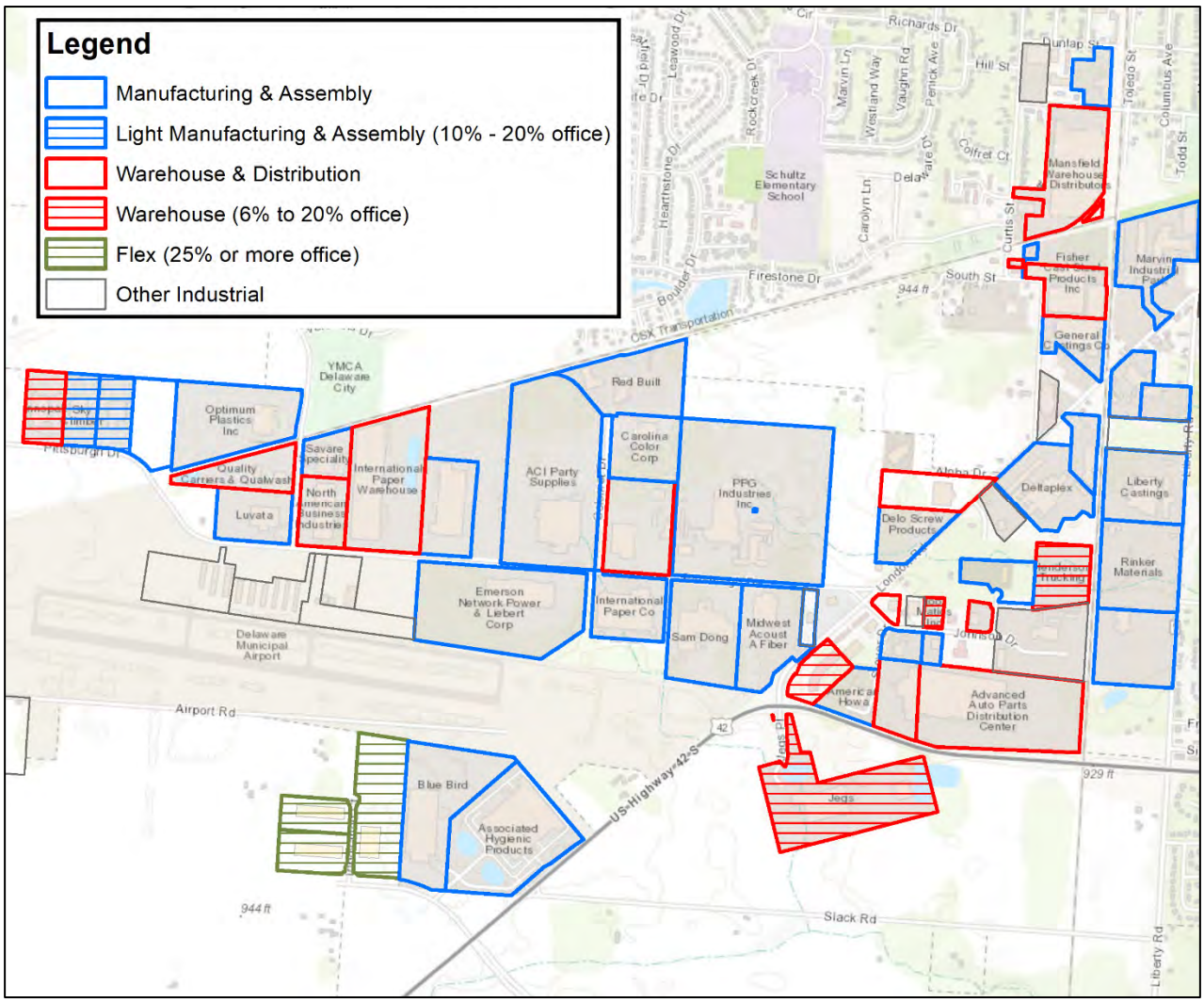
Two-thirds of industrial space in the City of Delaware is more than 30 years old, with more than one-third built more than 50 years ago.

Manufacturing facilities (light, medium and heavy) represent slightly more than half the overall industrial space.

Warehouse and distribution facilities are 45% of the industrial space with Flex space representing just 3.5% of the overall space, but 56.7% of development in the past decade. Flex spaces are those industrial buildings with 25% or more of the space dedicated for office use.



Except for Kroger's distribution facility along US Hwy 36 on the east edge of Delaware, nearly all of the industrial space in the city is on the southwest side. A map of industrial space in the southwest area, by major categories and share of office space follows.



DDA

Most tenants within these facilities identify in the Manufacturing, Wholesale Trade and Transportation & Warehousing sectors, NAICS codes 31-33, 42 and 48-49, respectively.

The new flex industrial development in the Innovation Center has attracted a wider range of business sectors than the traditional industry. Businesses in the Information and Professional, Scientific/Technical Services sectors (NAICS codes 51 and 54) can be accommodated by a higher share of office space with the flexibility for other uses in the raw warehouse area of the property. The properties along Innovation Drive are marketed as a "tech" hub targeting companies with research and development. According to the National Science Foundation, 30% of the domestic research and development spending occurs within these sectors.

Symmetry II, built in 2016, is 100.0% occupied. Tenants at the property include Guild Associates, CAMs, American Apex, and Mako Power. According to the Delaware County Auditor, 15,000 square feet or 25% of the overall space at Symmetry II is office space. A second flex building is under construction north of Symmetry II and is reportedly 60% to 70% occupied.



Symmetry II Building – 105 Innovation Drive



Back side of new flex Space - 109 Innovation Drive

Adjacent Symmetry II, is a large-scale flex industrial building, owned and operated by Nagase Chemtex, formerly Engineered Material Systems, Inc (EMS). The property includes 27,600 square feet of office and 81,000 square feet of warehouse space.



Jegs corporate headquarters, the only industrial building south of US Highway 42, has a similar-size office to Nagase Chemtex with a larger distribution/warehouse and separate research and development building. While DDA did not categorize their buildings as "flex" space, because of the lower share of office to warehouse space, when all buildings are combined, the overall Jegs campus shares similar aspects of flex industrial.

A. Area Demographics

1. Population Trends

The population in the City of Delaware has rapidly increased each of the past decades. The population for 2000, 2010, 2020 (estimated) and 2025 (projected) are summarized as follows:

	Year			
	2000 (Census)	2010 (Census)	2020 (Estimated)	2025 (Projected)
Population	26,010	34,813	40,977	44,121
Population Change	-	+8,803	+6,164	+3,144
Percent Change	-	33.8%	17.7%	7.7%

Source: 2000, 2010 Census; ESRI Incorporated

The population is projected to increase by 3,144 or 7.7% between 2020 and 2025. The population growth rate is slightly below overall Delaware County (9.6%) and 2.3 percentage points above the Columbus Metropolitan Statistical Area (5.4%).

2. Household Trends

Households are a better indication of housing demand than population, especially with numbers of persons per households declining nationally. Household trends within the city are summarized as follows:

	Year			
	2000 (Census)	2010 (Census)	2020 (Estimated)	2025 (Projected)
Households	9,794	13,278	15,764	17,021
Household Change	-	3,484	2,486	1,257
Percent Change	-	35.6%	18.7%	8.0%
Household Size	2.45	2.47	2.48	2.48

Source: 2000, 2010 Census; ESRI Incorporated

Households increased by 3,484 from 2000 to 2010. The household base experienced an increase of 2,486 households between 2010 and 2020. By 2025 the household base is projected to continue to increase to 17,021 households, a change of 8.0% since 2019. The average household size has been projected to remain relatively stable at an estimated 2.48 persons in 2020 and 2025. The estimated average household size matches the average for the metropolitan region and is below the Delaware County average of 2.73 persons per household. The larger average household size in Delaware County is attributed to the high share of homeowners (78.5%) largely residing in single-family homes.

Between 2020 and 2025, the greatest growth among household age groups is projected to be among the households ages 65 and older indicating an increasing need for housing for older adults/seniors in the market. A modest decline is projected among households younger than 25 and 35 to 64. Households by age are summarized as follows:

Households by Age	2020 (Estimated)		2025 (Projected)		Change 2020-2025	
	Number	Percent	Number	Percent	Number	Percent Points
Under 25	761	4.8%	809	4.8%	48	-0.1%
25 to 34	2,516	16.0%	2,777	16.3%	261	0.4%
35 to 44	3,190	20.2%	3,355	19.7%	165	-0.5%
45 to 54	3,128	19.8%	3,159	18.6%	31	-1.3%
55 to 64	2,670	16.9%	2,773	16.3%	103	-0.6%
65 to 74	2,080	13.2%	2,414	14.2%	334	1.0%
75 & Over	1,420	9.0%	1,732	10.2%	312	1.2%
Total	15,764	100.0%	17,021	100.0%	1,257	-

Source: ESRI, Incorporated

There is a projected one-percentage point tenure shift from 2010 to 2025, toward homeowners with an estimated increase of 2,454 homeowners versus a 1,289 increase in renter households. There remains an above average share of renters relative to the region. Households by tenure are distributed as follows:

Tenure	2010 Census		2020 (Estimated)		2025 (Projected)	
	Number	Percent	Number	Percent	Number	Percent
Owner-Occupied	8,097	61.0%	9,749	61.8%	10,551	62.0%
Renter-Occupied	5,181	39.0%	6,015	38.2%	6,470	38.0%
Total	13,278	100.0%	15,764	100.0%	17,021	100.0%

Source: ESRI, Incorporated

3. Household Income Trends

The distribution of households by income within the City of Delaware is summarized as follows:

Household Income	2020 (Estimated)		2025 (Projected)	
	Households	Percent	Households	Percent
Less Than $15,000	1,048	6.6%	941	5.5%
$15,000 to $24,999	922	5.8%	878	5.2%
$25,000 to $34,999	1,238	7.9%	1,222	7.2%
$35,000 to $49,999	2,145	13.6%	2,173	12.8%
$50,000 to $74,999	3,071	19.5%	3,237	19.0%
$75,000 to $99,999	2,615	16.6%	2,860	16.8%
$100,000 to $149,999	2,396	15.2%	2,882	16.9%
$150,000 to $199,999	138	8.8%	1,777	10.4%
$200,000 & Over	941	6.0%	1,051	6.2%
Total	15,764	100.0%	17,021	100.0%
Median Income	$69,051		$75,371	

ESRI, Incorporated projects a significant increase among households earning more than $100,000 from 2020 to 2025.

The following table shows the estimated number of owner households within the City of Delaware by size and income projected for 2025.

Owner Households	1-PPH	2-PPH	3-PPH	4-PPH	5+PPH	Total, All Ages	Age 65+
Less than $15,000	128	44	12	18	8	210	132
$15,000 - $24,999	113	21	8	9	2	153	139
$25,000 - $34,999	248	138	21	6	8	421	248
$35,000 - $49,999	343	241	71	45	15	716	419
$50,000 - $74,999	538	816	280	126	135	1,894	718
$75,000 - $99,999	495	856	389	281	201	2,223	349
$100,000 - $149,999	170	833	469	528	320	2,320	302
$150,000 or more	94	801	605	733	381	2,614	411
Total	2,129	3,750	1,855	1,746	1,071	10,551	2,717
Share	20.2%	35.5%	17.6%	16.5%	10.1%	100.0%	25.8%

PPH – Persons Per Household
Note: The data is derived from HUD's Economic and Market Analysis Division, 2018 ACS county data and has been adjusted accordingly by DDA to reflect 2020 household estimates for the city.

Owner households of one- to two-persons represent slightly more than half of the homeowners in the City of Delaware, bolstered by one-fourth homeownership by householders age 65 and older. The high share of older adult homeowners and limited condominium offerings indicates an untapped condominium market.

There is twice the share of one-person renter households, representing 41.5% of the renter base. The following table shows the estimated number of renter households within the City of Delaware by size and income projected for 2025.

Renter Households	1-PPH	2-PPH	3-PPH	4-PPH	5+PPH	Total, All Ages	Age 65+
Less than $15,000	500	161	28	28	14	731	252
$15,000 - $24,999	480	94	50	44	57	725	279
$25,000 - $34,999	373	174	86	86	83	801	198
$35,000 - $49,999	696	352	224	120	63	1,457	301
$50,000 - $74,999	427	527	235	107	46	1,343	255
$75,000 - $99,999	95	252	136	103	51	637	72
$100,000 - $149,999	87	155	122	98	100	562	59
$150,000 or more	26	42	60	40	45	214	12
Total	2,685	1,757	941	626	460	6,470	1,429
	41.5%	27.2%	14.6%	9.7%	7.1%	100.0%	22.1%

PPH – Persons Per Household
Note: The data is derived from HUD's Economic and Market Analysis Division, 2018 ACS county data and has been adjusted accordingly by DDA to reflect 2020 household estimates for the city.

New market-rate rental housing development generally caters to renters with incomes of $40,000 and higher. By 2025, there will be an estimated 3,727 renter households with incomes above $40,000. DDA expects a site-specific market-rate property to capture 5% to 7% of the target market, depending on the characteristics of the site and the surrounding environment. Applying these capture rates to the income-appropriate renter households

equates to potentially building a single market-rate project of 186 to 260 units. Based on the five-year market-rate potential of 590 units, the market can absorb up to three of market-rate projects over the next five years (source: *Residential Market Analysis*, Randall Gross).

The remaining 2,743 renter households with incomes below $40,000, represent demand for additional affordable housing in the market. There are 523 income-restricted units in the City of Delaware, all occupied and operating from waiting lists. The Residential Market Analysis estimates demand for 360 to 600 units within this income group. The Low-Income Tax Credit program represents the most likely vehicle to develop additional affordable housing. Based on our interview with developers, the minimum threshold to consider development is a project with at least 40 units.

4. Consumer Spending

Retail Trade

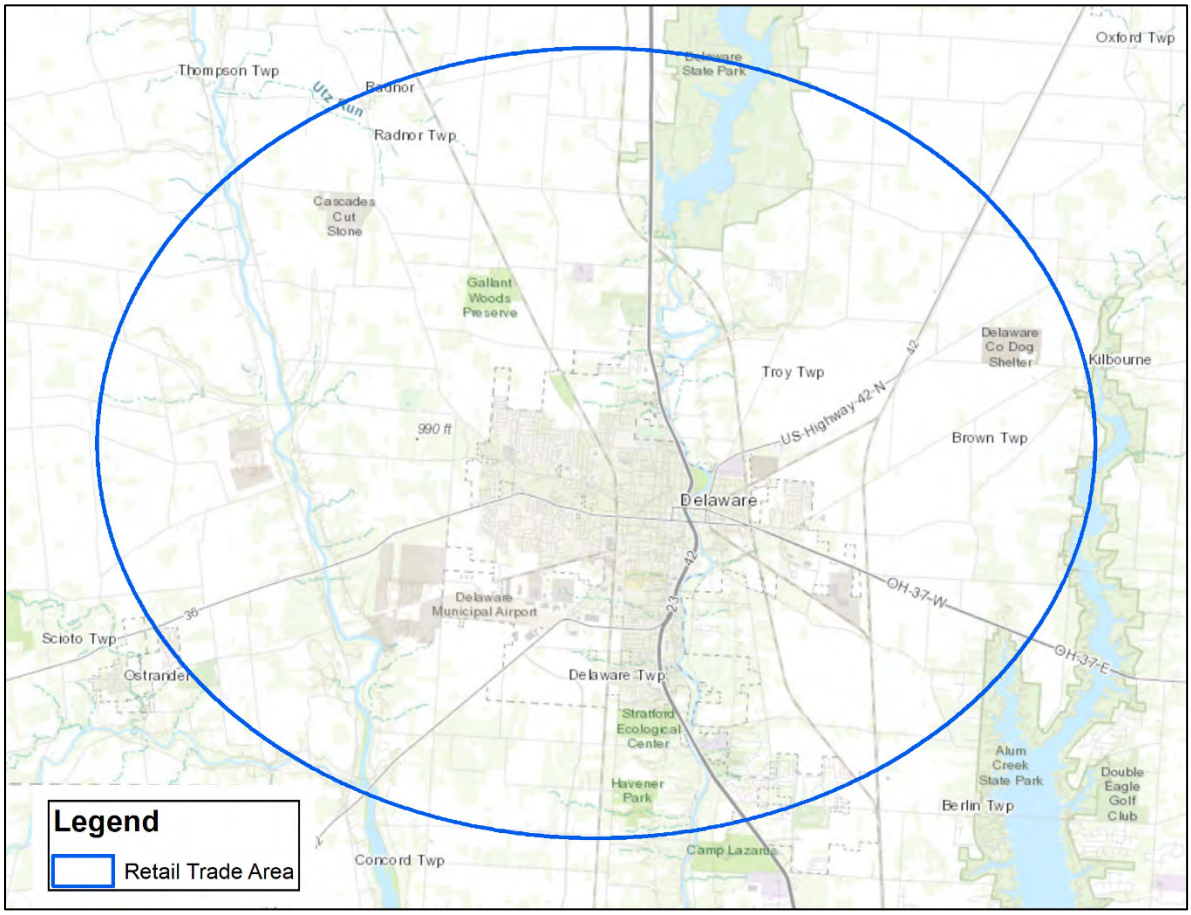
By 2025, City of Delaware residents will have an estimated retail trade spending potential of $700 million, approximately $100 million above current estimated retail spending, of which $55 million represents retail trade excluding automobile and online sales. The additional spending has the potential to support another 180,000 square feet of retail space by 2025. A summary of estimated consumer spending power in the City of Delaware by retail trade group and year follows.

NAICS Code	Retail Trade Group	2020 (Estimated)	2025 (Projected)	Share
441	Motor Vehicle & Parts Dealer	$142,043,989	$167,326,606	23.6%
442	Furniture & Home Furnishings	$11,438,281	$13,474,197	1.9%
443	Electronics & Appliance Stores	$8,989,552	$10,589,616	1.5%
444	Bldg. Materials, Garden Equip & Supply	$41,193,826	$48,525,975	6.8%
445	Food & Beverage	$90,105,201	$106,143,158	15.0%
446	Health & Personal Care	$33,580,490	$39,557,530	5.6%
447	Gasoline Stations	$63,411,511	$74,698,219	10.5%
448	Clothing & Clothing Accessories	$19,915,449	$23,460,228	3.3%
451	Sporting Goods, Hobby, Book & Music	$8,715,576	$10,266,874	1.4%
452	General Merchandise	$81,537,217	$96,050,145	13.5%
453	Miscellaneous	$10,971,179	$12,923,955	1.8%
454	Non-store (including online sales)	$90,335,695	$106,414,677	15.0%
	Total	$602,237,965	$709,431,180	100.0%

Sources: 2017 Economic Census; ESRI, Incorporated and DDA

According to the 2017 Economic Census, retail sales within the City of Delaware totaled $745,611,000. The substantially higher sales than consumer spending potential is attributed, in large part, to out-of-town consumers buying vehicles, parts and purchasing gasoline and convenience goods. In 2017, the non-auto retail trade groups accounted for approximately $350 million, approximately 110% of the local estimated spending. Therefore, external support represents at least 10% of total retail sales and likely upwards of 30%.

Based on drive times and the location of competing retail on the periphery of the City of Delaware, DDA has identified the following Retail Trade Area:



The trade area has a population 10,000 above the City of Delaware and in 2017 has current sales potential of $650 million, of which approximately $425 million are non-automobile. The trade area consumer spending potential is 80% of local estimated sales. By 2025, the non-automobile spending potential in the trade area is projected to increase to $477 million.

Based on our inventory of all retailers in the City of Delaware, we estimate the current retail sales among non-auto and non-store retail is approximately $370 million, a $20 million increase since 2017. Residents within the trade area have a spending potential approximately $110 million in excess sales within the City of Delaware. However, $20 million of the additional spending is projected among grocery stores and other food and beverage facilities, which in DDA's opinion, can be accommodated by current businesses through 2025. The potential unmet demand for the $90 million retail spending could generate approximately an additional 210,000 square feet of occupied retail space in the City of Delaware.

Restaurants

According to the 2017 Economic Census, sales within the City of Delaware among food services and drinking places totaled $82 million. With a current food and beverage inventory of 257,037 square feet, sales in 2017 equated to $319 per square foot. This is considered a healthy overall sales per square foot amount. During this time City of Delaware residents

were spending $54 million at these businesses, or 65.6% of total sales. Within the retail trade area, residents were spending $66 million at restaurants and drinking establishments, reflecting 80% of sales, similar to the retail trade market.

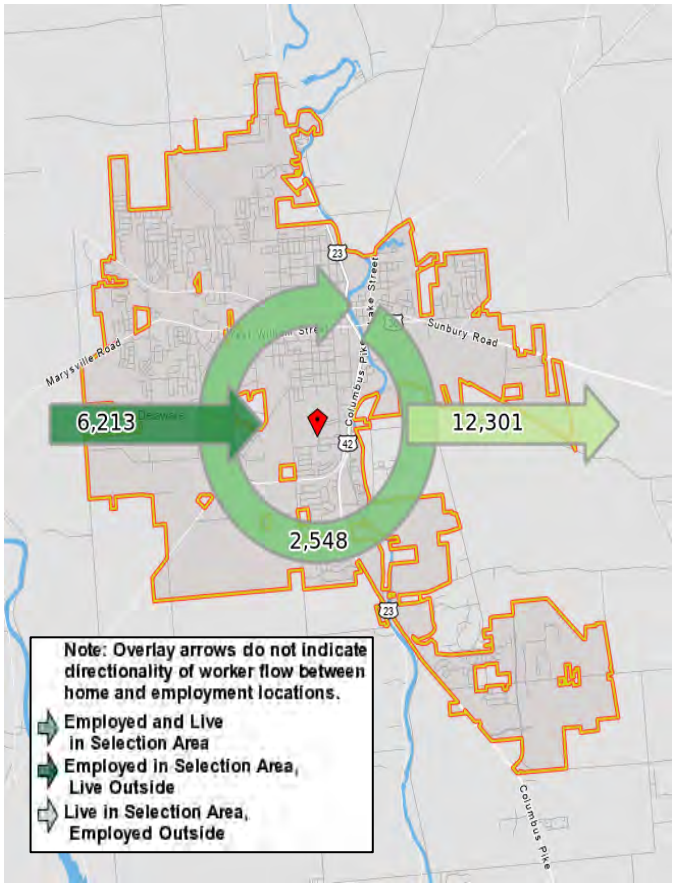
By 2025, DDA projects restaurant spending power within the local trade area will reach $87 million. Assuming 80% of the restaurant spending occurs in the trade area, at an average of $325 per square foot, in the next five years there is potential to support another 50,000 square feet of food and beverage space in the City of Delaware.

B. Economy

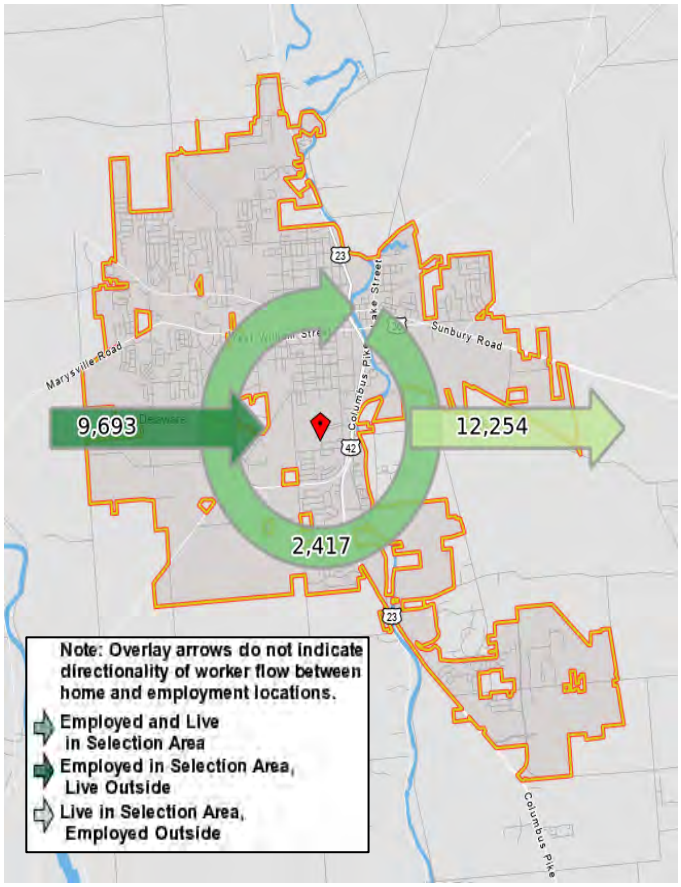
1. Employee Commuting Trends

A comparison of Census' 2002 and 2018 Longitudinal Employer-Household Dynamics private employment data shows that fewer residents work within the city limits while the share of non-residents commuting to work in Delaware has increased from 70% to 80%.

2002 Employee Commuting Patterns



2018 Employee Commuting Patterns



Since 2002, private employment among city residents has remained relatively stable. During this period, however, there was an increase of 3,349 private sector employees, largely captured by persons commuting into the City of Delaware. According to ESRI, Incorporated, two-thirds (66.7%) of the employed residents have a white-collar occupation, below the high share within overall Delaware County (78.2%), but comparable to Franklin County (67.8%) and the Columbus MSA (66.5%) and well above the statewide average (60.6%).

A further comparison of employment among industry classes for 2002 and 2018, shows the distribution of employment in the city by industry class has remained relatively unchanged. Among residents, however, there has been a significant shift toward employment in the "All Other Services" category, represented with white-collar industries.

2002 Distribution of Employment – Commuters and Resident Employees

Industry Class	Employed in City, Live Outside	Employed & Live in City	Total Citywide Employment	Share of Citywide Employment	Live in City, Employed Outside	Total Resident Employment	Share of Resident Employment
Goods Producing	1,654	611	2,265	25.9%	2,569	3,180	21.4%
Trade, Transportation and Utilities	1,734	440	2,174	24.8%	3,143	3,583	24.1%
All Other Services	2,825	1,497	4,322	49.3%	6,589	8,086	54.3%
Total	6,213	2,548	8,761	100.0%	12,301	14,849	100.0%

The employment profile of the city in 2002 was generally representative of the resident labor force during that period. However, the significant shift in resident employment classes over the past two decades, now has an employment base that requires significant commuter support as more residents leave the city for work.

2018 Distribution of Employment – Commuters and Resident Employees

Industry Class	Employed in City, Live Outside	Employed & Live in City	Total Citywide Employment	Share of Citywide Employment	Live in City, Employed Outside	Total Resident Employment	Share of Resident Employment
Goods Producing	2,398	592	2,990	24.7%	1,827	2,419	16.5%
Trade, Transportation and Utilities	2,785	402	3,187	26.3%	2,707	3,109	21.2%
All Other Services	4,510	1,423	5,933	49.0%	7,720	9,143	62.3%
Total	9,693	2,417	12,110	100.0%	12,254	14,671	100.0%

The top 50 census tracts where commuters reside is largely within Delaware, Morrow, Marion and Union counties (see map below). Workers also reside in the northern portion of Franklin County, outside of the I-270 outer belt, but the most concentrated resident commuter area is 10% of the highest concentrated worker area in Delaware.

United States Census Bureau **OnTheMap**

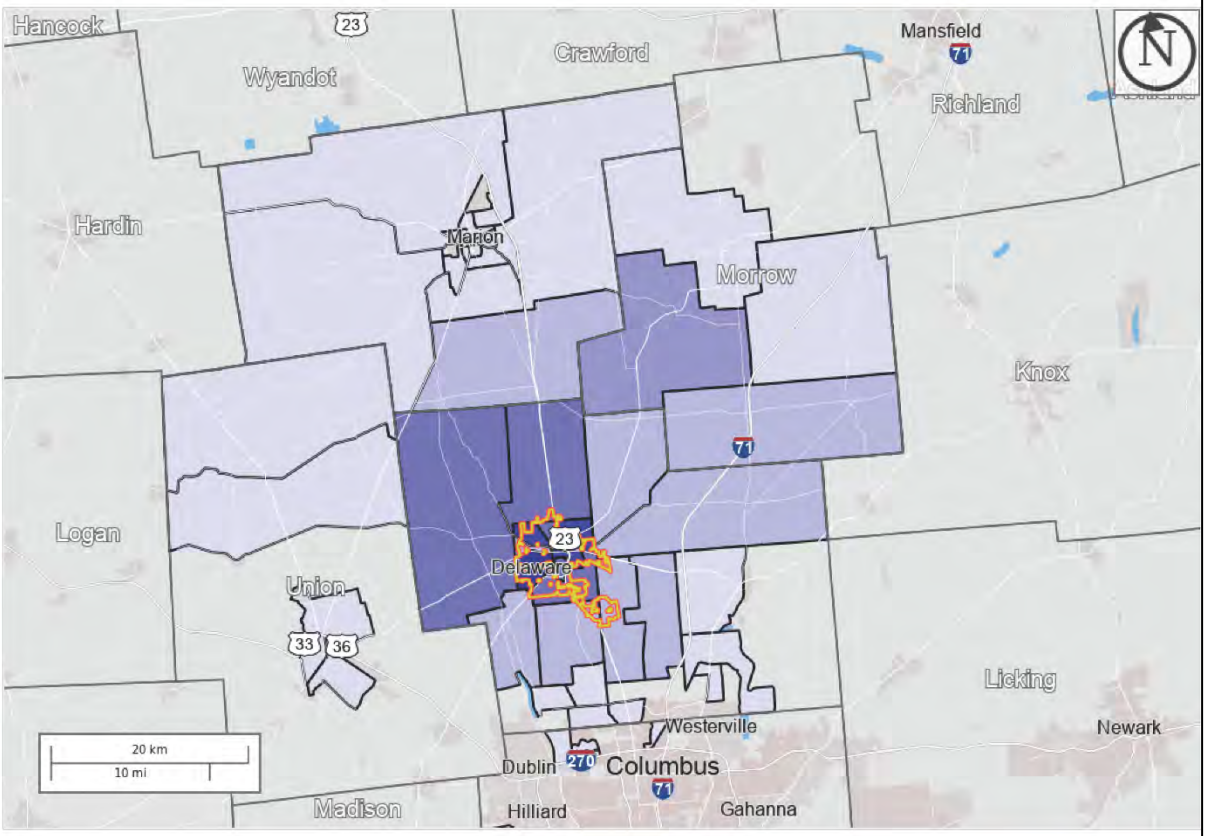
Home Destination Report - Work Selection Area to Home Census Tracts

Private Primary Jobs for All Workers in 2018

Created by the U.S. Census Bureau's OnTheMap https://onthemap.ces.census.gov on 12/10/2020

Counts of Private Primary Jobs from Work Selection Area to Home Census Tracts in 2018

All Workers



Map Legend

Job Count
- 397 - 457
- 337 - 396
- 277 - 336
- 217 - 276
- 157 - 216
- 97 - 156
- 36 - 96

Selection Areas
- Analysis Selection



United States Census Bureau

Page 1 of 4

DDA

2. Labor Force Profile

The workforce in the City of Delaware has a slightly higher share of young workers (ages 29 and younger) compared to the Columbus Metropolitan Statistical Area (26.4%). The area has a much higher share of low-wage earners (26.4% in Delaware compared to 18.6%) and low share of upper-wage earners (38.6% in Delaware, 46.5% in Columbus MSA). A summary of employee profiles by income, age and industry is in the tables below (source: 2018 Longitudinal Census data).

City of Delaware – Employee Profile (worked in City of Delaware in 2018)

Employee Income (2018)	<30	30 - 54	55+	Total	Share
Less than $15,000	1,822	847	523	3,192	26.4%
$15,000 - $39,999	1,317	2,076	850	4,243	35.0%
$40,000 and Higher	499	2,920	1,256	4,675	38.6%
Total	3,638	5,843	2,629	12,110	100.0%
Share	30.0%	48.2%	21.7%	100.0%	

In comparison to the region including Delaware, Marion, Morrow and Union Counties, the City of Delaware has a share of employment higher than 2.8 percentage points in the Manufacturing, Transportation/Warehousing, Educational Services and Health Care/Social Assistance (sources: Census LEHD).

Industry Class	Industry Sector (2018)	Total	City Share	Regional Share	Percentage Point Difference
Goods Producing	Agriculture, Forestry, Fishing & Hunting	2	0.0%	0.8%	-0.8%
	Mining, Quarrying & Oil/Gas Extraction	0	0.0%	0.1%	-0.1%
	Construction	474	3.9%	4.0%	-0.1%
	Manufacturing	2,514	20.8%	17.9%	2.9%
	Subtotal	*2,990*	24.7%	*22.8%*	*1.9%*
Trade, Transportation & Utilities	Utilities	27	0.2%	0.3%	-0.1%
	Wholesale Trade	187	1.5%	3.2%	-1.7%
	Retail Trade	1,794	14.8%	12.9%	1.9%
	Transportation and Warehousing	1,179	9.7%	3.4%	6.3%
	Subtotal	*3,187*	26.3%	*19.8%*	*6.5%*
All Other Services	Information	55	0.5%	0.7%	-0.2%
	Finance and Insurance	195	1.6%	5.2%	-3.6%
	Real Estate	148	1.2%	1.1%	0.1%
	Professional, Scientific, & Technical	305	2.5%	7.2%	-4.7%
	Mgt. of Companies and Enterprises	92	0.8%	9.8%	-9.0%
	Admin & Support, Waste Mgt. & Rem.	596	4.9%	9.1%	-4.2%
	Educational	634	5.2%	1.1%	4.1%
	Health Care & Social Assistance	2,113	17.4%	9.3%	8.1%
	Arts, Entertainment & Recreation	149	1.2%	2.1%	-0.9%
	Accommodation & Food	1,265	10.4%	9.2%	1.2%
	Other Services (excl. Public Admin)	381	3.1%	2.7%	0.4%
	Subtotal	*5,933*	*49.0%*	*57.4%*	*-8.4%*

The majority of persons employed in the Goods Producing industry, which includes the Manufacturing sector, earn in excess of $40,000 a year or $18.75 per hour. The share of workers earning $40,000 in the Goods Producing class is 67.4%, 3.2 percentage points lower than the region (70.6%).

Industry Class	Annual Estimated Pay (Hourly Rate)		
	Less than $15,000 (<$7.21)	$15,000 - $39,000 ($7.21 - $18.75)	$40,000+ (>$18.75)
Goods Producing	142	832	2,016
Trade, Transportation & Utilities	830	1,189	1,168
All Other Services	2,220	2,222	1,491
Total	3,192	4,243	4,675

The "All Other Services" Class is significantly underrepresented in the City of Delaware, relative to regional average. Specifically, the counties in the region collectively have more than two times the employment than the City in the following sectors:

- Information
- Finance and Insurance
- Real Estate
- Professional, Scientific and Technical
- Mgt. of Companies and Enterprises
- Admin. & Support, Waste Mgt. and Rem.

The sectors above typically operate in office environments, a limited real estate alternative in the City of Delaware. Delaware County, however, has a higher share of employment in this sector group than the region (38.0%), many located in the Polaris area.

3. Projected Employment

According to the Ohio Department of Job and Family Services', *2026 Job Outlook, Columbus Metropolitan Statistical Area,* employment in the Columbus MSA is projected grow nearly 100,000 from 2016 through 2026. A summary of the projected changes in the industries or employment categories follows.

Significant Growth	Modest Growth	Decline
• Construction	• Mining	• Manufacturing
• Financial Activities	• Retail Trade	• Information
• Professional & Business Services	• Leisure and Hospitality	• Agriculture, Forestry, Fishing and Hunting
• Education and Health Services	• Other Services	

The City of Delaware is capitalizing on the growth in the Education and Health Services sector by attracting new medical businesses with modern medical office space, such as the West Medical Center. The two most disproportionately low shares of businesses in the city are among Financial Activities and Professional and Business Services. As the table on the

following page shows, these two categories have among the highest projected employment gains.

Columbus Metropolitan Statistical Area
Projected Employment Growth
2016 through 2026

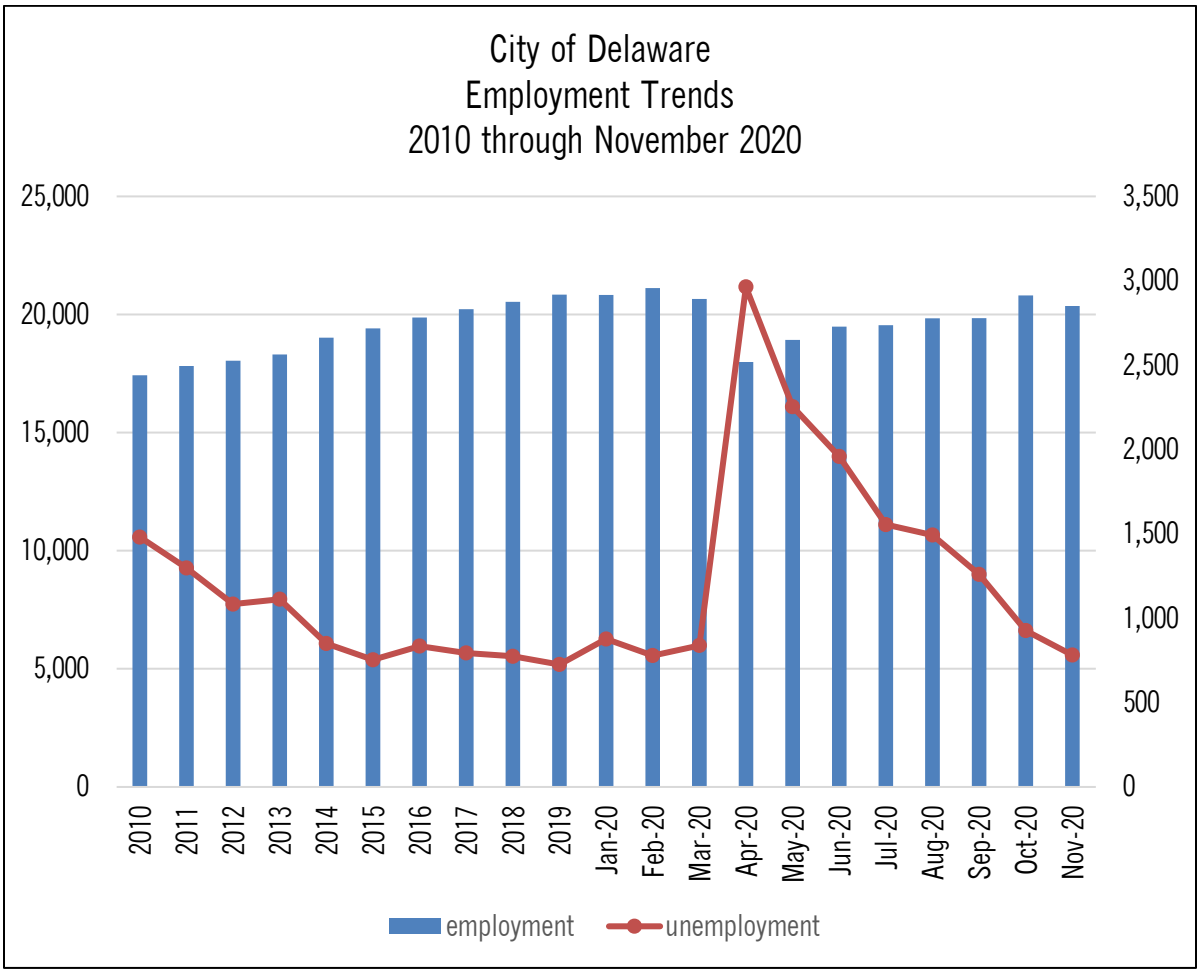
Description	Employment		Projected Change in Employment	
	2016 Annual	2026 Projected	2016-2026	Percent
TOTAL	**1,087,154**	**1,185,594**	**98,440**	**9.1%**
Goods Producing	**118,937**	**120,595**	**1,658**	**1.4%**
Agriculture, Forestry, Fishing and Hunting	10,920	10,824	-96	-0.9%
Mining	793	837	44	5.5%
Construction	35,641	39,872	4,231	11.9%
Manufacturing	71,583	69,062	-2,521	-3.5%
Trade, Transportation, and Utilities	**193,965**	**203,520**	**9,555**	**4.9%**
Wholesale Trade	36,013	36,191	178	0.5%
Retail Trade	103,716	106,221	2,505	2.4%
Transportation and Warehousing	N/A	N/A	N/A	N/A
All Other Services	**1,223,523**	**1,380,506**	**156,983**	**12.8%**
Information	**15,725**	**15,028**	**-697**	-4.4%
Financial Activities	**78,961**	**85,755**	**6,794**	**8.6%**
Finance and Insurance	65,490	71,285	5,795	8.8%
Real Estate and Rental and Leasing	13,471	14,470	999	7.4%
Professional and Business Services	**170,141**	**188,911**	**18,770**	**11.0%**
Professional, Scientific, and Technical Services	58,332	61,936	3,604	6.2%
Management of Companies and Enterprises	36,326	43,185	6,859	18.9%
Administrative and Waste Services	75,483	83,790	8,307	11.0%
Education and Health Services	**227,692**	**274,627**	**46,935**	**20.6%**
Educational Services	80,142	89,941	9,799	12.2%
Health Care and Social Assistance	147,550	184,686	37,136	25.2%
Leisure and Hospitality	**104,791**	**110,144**	**5,353**	**5.1%**
Arts, Entertainment, and Recreation	14,130	15,209	1,079	7.6%
Accommodation and Food Services	90,661	94,935	4,274	4.7%
Other Services	**44,628**	**46,604**	**1,976**	**4.4%**

Note: The Columbus MSA includes the following counties: Delaware; Morrow; Union; Licking; Franklin; Madison; Pickaway; Fairfield; Perry and Hocking

Source: Ohio Department of Job and Family Services', *2026 Job Outlook, Columbus Metropolitan Statistical Area*

4. Resident Employment Trends

The following chart was generated from the U.S. Department of Labor's, Bureau of Labor Statistics. It reflects employment and unemployment trends for the City of Delaware, Ohio. Pre-COVID 19, unemployment rates were at or near all-time lows. Unemployment rates peaked in April 2020 at 14.1% and have continued to decline each month since to November's 3.7% rate. The total employment, as of November 2020, is approximately 150 persons lower than Pre-COVID 19.



Note: November 2020 employment data is preliminary.

Overall employment in Delaware County was impacted less with fewer service-related jobs. The November 2020 unemployment rate is at 3.7%. Employment bounced back faster in the City of Delaware than the overall MSA which sits at a 4.9% unemployment rate (preliminary November 2020).

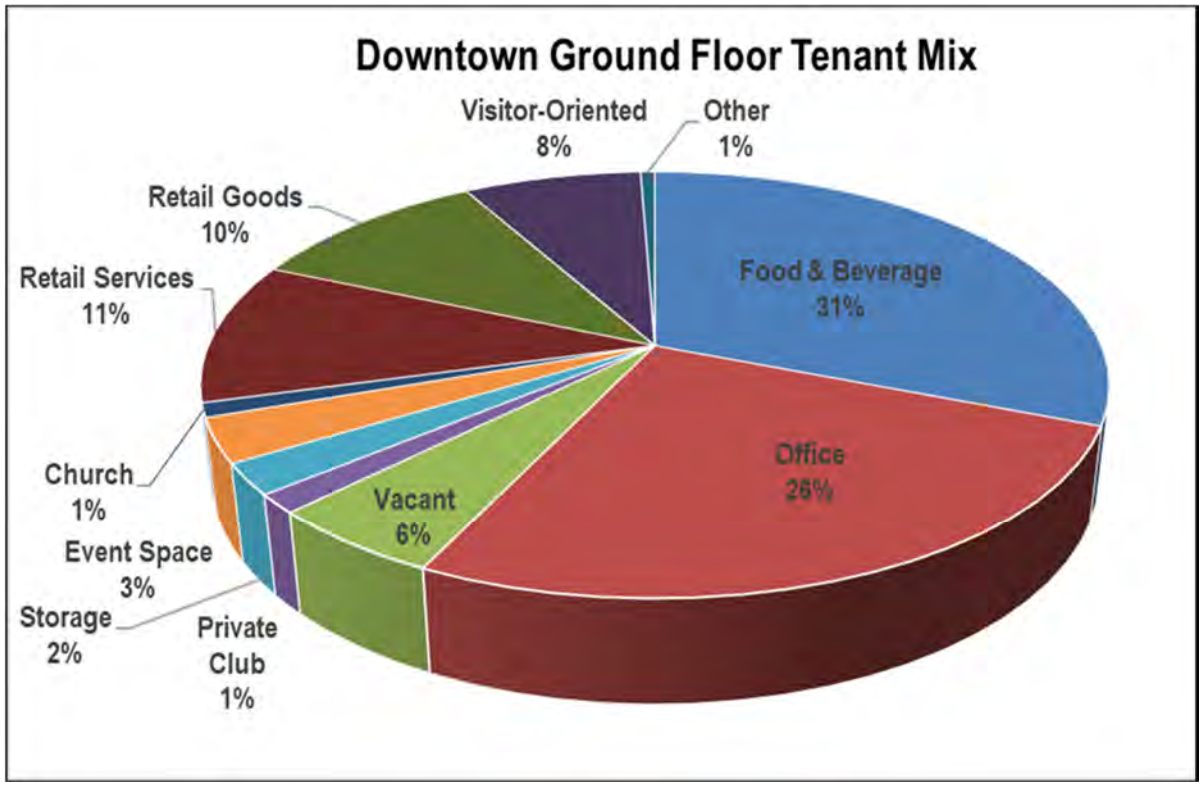
According to the U.S. Bureau of Labor Statistics, in terms of unemployment, the Leisure and Hospitality industry was the most impacted by COVID-19.

Downtown Tenant Mix

The market potential for additional housing and commercial space in Downtown Delaware is predicated on the variety and quality of commercial businesses within the downtown. The commercial environment is an important factor in providing a vibrant shopping and entertainment area, a unique lifestyle for persons to live downtown and a place for businesses to thrive.



Based on inventory data provide by the city, there is approximately 325,000 square feet of ground floor space in the core area of Downtown Delaware. Of this space, 31% are food and beverage businesses, followed by 26% office. A distribution of ground floor space in Downtown Delaware follows.



Downtown Commercial Environment Comparisons

DDA inventoried other medium-sized downtowns in Ohio to identify the typical mix of uses associated with downtowns in different stages of maturation. Based on this comparative assessment, Downtown Delaware has a vibrant mix of food and drink establishments and high occupancy. There is a high share of office users in ground floor spaces. Office workers bolster consumer spending in the downtown, however, such a high share of offices on ground floor spaces limits opportunities for space to be used for retailers, especially visitor-oriented establishments. A comparison of the Downtown Delaware mix of uses with the average share in a variety of commercial environments follows.

Quality Of	Average Share of Uses in Downtown Ground Floor Space by Quality of Environment					
Environment	Food & Drink	Vacant	Visitor-Oriented	Offices	Retail Goods/Services	Other Uses
Poor	10%	30%	0%	10%	10%	40%
Limited	15%	25%	3%	10%	14%	33%
Fair	25%	15%	5%	15%	20%	20%
Healthy	27%	10%	10%	20%	23%	10%
Vibrant	30%	5%	13%	20%	27%	5%
Delaware	*31%*	*6%*	*8%*	*26%*	*21%*	*8%*

Overall, it is DDA's opinion that the downtown area rates at a healthy-to-vibrant commercial environment. The introduction of additional visitor-oriented retail will immediately improve the downtown and attract more visitors, patrons and residents (see examples of visitor-oriented tenants below).

It is important to note that the downtown has a vibrant mix of restaurants in the downtown area. While there is additional support projected for restaurants in the City of Delaware over the next five years, we recommend limited placement of additional restaurants in the downtown. A disproportionately high share of restaurants can adversely impact other retailers as lease rates increase and there is a lack of new space for other resident and visitor-oriented uses.

Downtown Delaware has most of the common businesses found in other well-developed downtowns. A list of additional downtown ground floor visitor-oriented and retail goods/services tenants not in Downtown Delaware but present in other downtowns follows.

Tenant Types Not Located in Downtown Delaware

<u>Visitor-Oriented</u>

- Arcade bar
- Bicycle shop
- Candle shop
- Painting studio
- Vintage shop

<u>Retail Goods/Services</u>

- Bridal shop
- Drug store
- Jeweler
- Pet groomers
- Pet supplies

Drug stores in downtowns, notably, are those that have typically been in the market for decades.

Key Market Characteristics by Development Type

A market exists for a wide variety of development types throughout the City of Delaware. It is important that future (re)development include key site characteristics and complementary land uses to maximize marketability. A summary of key characteristics by development type follows.

Multifamily Rentals

Apartment development benefits from visibility to high volume traffic (at least 10,000 cars per day). A site with limited visibility will have difficulty in getting enough prospective renter traffic to sustain occupancy levels. The next generation of renters (Millennials) are attracted to mixed-use environments, especially housing that is within walking/biking distance to coffee shops, parks, brew pubs, restaurants and within a quick commute to work. Maximizing density of housing is important to contributing to the mixed-use environment.

For-Sale Housing

Homeowners are making a long-term commitment and the primary concern is having a home in an attractive environment and, for young family homeowners, highly rated schools. Most single-family subdivisions are surrounded by single-family homes and homeowners pay premiums to be adjacent to golf courses and other types of passive greenspace or wooded wetlands. There are successful examples of single-family master planned communities connected to common area amenities and even commercial town centers via walking paths. Based on DDA's online survey of other Ohio communities, the ability to walk to a park is viewed as one of the most positive proximate amenities.

Retail/Restaurants

Market exposure is essential to the success of retail/restaurants, including the high volume of vehicle traffic and in the case of downtown, also pedestrian traffic. Retailers generally want to be next to other retailers within the traffic pattern and/or view of an anchor store. Retail strip centers or small neighborhood retail development are the most vulnerable to changes in the marketplace.

Offices

There is a general lack of quality modern office alternatives, especially those larger than 5,000 square feet. While office users want "good" office space, it is more important to have nearby restaurants that can be quickly and easily accessed for their employees and clients. Grocery stores also are shopped regularly by office employees (source: ICSC).

Hotel

Hoteliers require sites with nearby traveler services, most notably multiple restaurants. Proximity to demand drivers such as businesses, visitor attractions and student population concentrations are also important considerations.

Industrial

Access to highways remains one of the most important supporting factors for industrial development. Heavy and medium manufacturers typically desire a location remote from population to avoid any future environmental conflicts. Users of industrial buildings with appreciable amounts of office space, like Flex space, have locational needs similar office users.

An optimal location for a market-supported development can maximize marketability of a development and enhance the marketability of surrounding uses and encourage future development.

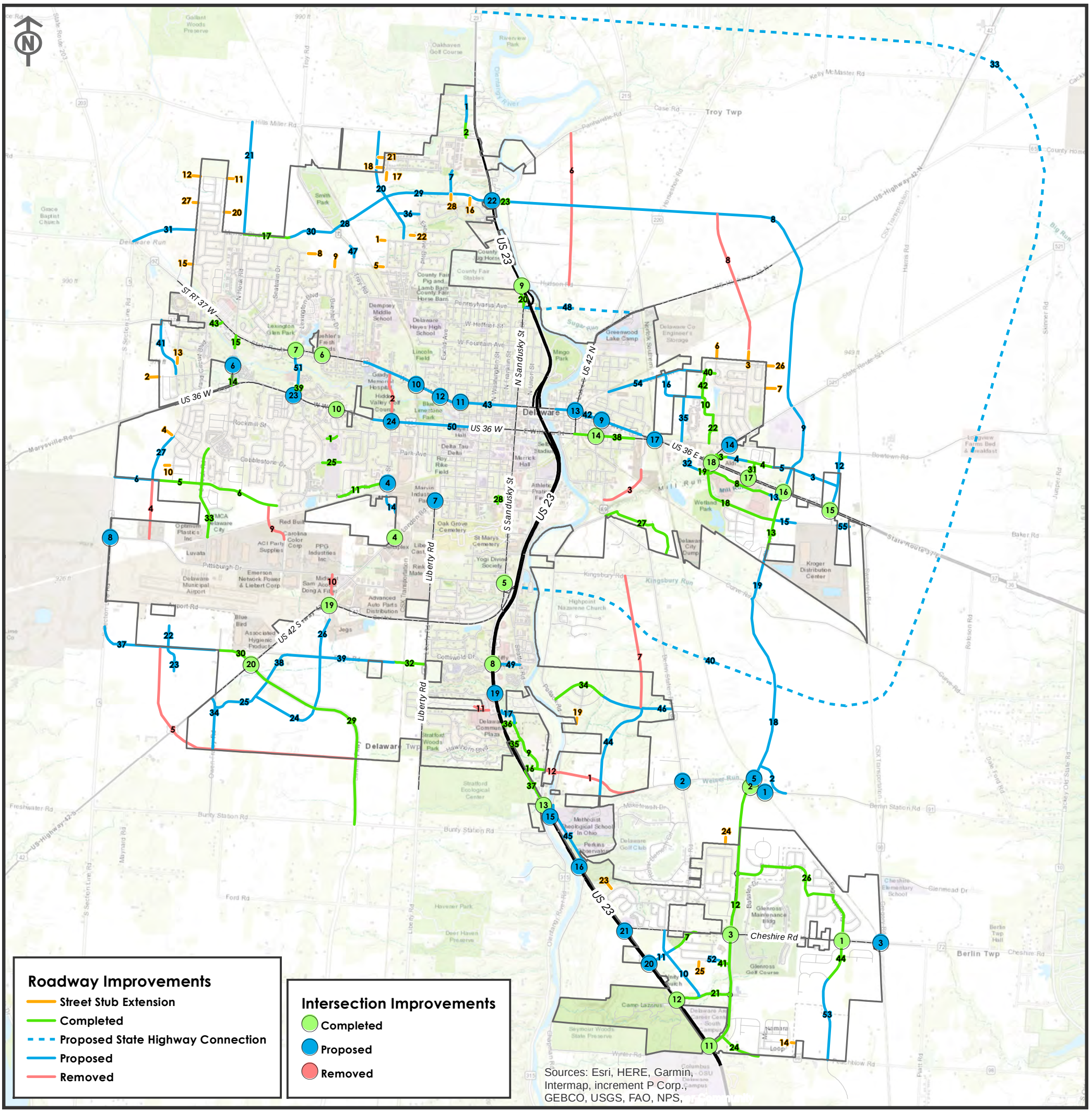
Conclusions

The results of DDA's real estate market assessment of the City of Delaware shows strong underlying market factors to support additional real estate development, including, but not limited to the following:

- Current low to moderate vacancy rates
- Lease rates supporting renovation/construction costs
- Significant household growth
- Low unemployment rates
- Increased resident spending power
- Sustainable sales/absorption rates

The city currently has limited office space and lodging, emphasized by the city's changing demographic/economic landscape. While COVID-19 has certainly contributed to a pause in the commercial development market, it is DDA's conclusion that the demand will continue to exist for these types of real estate beyond the pandemic. To facilitate office development, especially multi-tenant for lease space, the city likely will have to provide some financial incentives.

Market demand, in and of itself, is not enough for successful real estate development. Location plays a key role in the success of real estate development and the economic impact on the surrounding uses. Priorities for real estate development should revolve around existing assets, such as the vibrant downtown and other complementary uses (refer to page 7 for recommended priority development areas).



Roadway Improvements

Proposed:

1 Backage Road Extension
2 Berlin Station Road Relocation
3 Biltmore Drive Extension
4 Biltmore Drive Extension
5 Biltmore Drive Extension
6 Boulder Drive Extension
7 Bruce Road Extension
8 Byxbe Parkway Extension
9 Byxbe Parkway Extension
10 Cheshire Crossing Drive Extension
11 Cheshire Road Extension
12 Commercial Connector Road
13 Commercial Frontage Road
14 Curtis Street Realignment
15 Davidson Lane Extension
16 Ferguson Avenue Extension
17 Frontage Road Extension
18 Glenn Parkway Extension
19 Glenn Road Improvement
20 Heritage Blvd. Extension
21 Houk Road Extension to Hills Miller Rd.
22 Industrial Access Drive (North)
23 Industrial Access Drive (South)
24 Industrial Backage Road Construction
25 Industrial Backage Road Construction
26 Jegs Blvd. Extension
27 Lehner Woods Blvd. Extension
28 Merrick Blvd. CSX RR Crossing
29 Merrick Blvd. Extension
30 Merrick Blvd. Extension (Cambridge to Troy)
31 Merrick Blvd. Extension West to SR 203
32 Mill Run Loop Extension
33 Northeast US36/SR37/US23 Bypass
34 Owen Fraley Road Realignment
35 Residential Connector Street
36 Residential Connector Street
37 Sawmill Parkway Extension Phase G
38 Slack Road Realignment
39 Slack Road Reconstruction
40 Southeast US23/US42 to US36/37 Bypass
41 Springer Woods Blvd Extension
42 SR37 (E Central Avenue) Improvement
43 SR37 (W Central Ave. Reconstruction)
44 Stockdale Farms Drive
45 Stratford Road Extension
46 Terra Alta Drive Extension
47 Troy Road Realignment
48 US 42 to US 23 Connector
49 US23/Stratford Connector
50 US36 (W William Street Reconstruction)
51 Valleyside Drive Extension
52 Vista Ridge Drive Extension
53 Winterbourne Drive Extension
54 Vernon Avenue Reconstruction
55 Nutter Farm Lane Extension (East)

Street Stub Extensions:

1 Rutherford Ave Extension
2 Aaron Drive Extension
3 Ashburn Drive Extension
4 Benjamin Street Extension
5 Birchard Ave Extension
6 Brittany Drive Extension
7 Brittany Drive Extension
8 Broadview Chase Dr Extension
9 Buehler Dr. Extension
10 Burgoyne Street Extension
11 Connaught Place Extension
12 Connaught Place Extension
13 Curly Smart Circle Extension
14 Ensigns Lane Extension
15 Farmland Drive Extension
16 Hayloft Dr Extension
17 Hope Lane Extension
18 Kensington Dr Extension
19 Prato Road Extension
20 Silversmith Lane Extension
21 Sylvan Lane Extension
22 Taylor Ave Extension
23 Unnamed Street Extension
24 Unnamed Street Extension
25 Unnamed Street Extension
26 Wallace Drive Extension
27 White Elm Drive Extension
28 Woodhaul Dr Extension

Complete:

1 Applegate Lane Extension
2 Backage Road
3 Biltmore Drive Extension
4 Biltmore Drive Extension
5 Boulder Drive Extension
6 Boulder Drive Extension (S Houk to Firestone)
7 Cheshire Road Relocation
8 Commercial Frontage Road
9 Coughlan Lane Extension
10 Ferguson Ave Extension
11 Firestone Drive Extension
12 Glenn Parkway Extension
13 Glenn Road Improvement
14 Houk Road Improvment
15 Houk Road Realignment
16 Meeker Way Construction
17 Merrick Blvd. Extension
18 Mill Run Crossing Construction
19 Mill Run Loop Extension
20 N Sandusky Street Extension
21 Ohio Health Blvd.
22 Old Colony Drive Extension
23 Panhandle Road Bridge Replacement
24 Peachblow Road Realignment
25 Penick Avenue Extension
26 Residential Loop Connection
27 Rochedale Run/Randall Rd.
28 S Washington St Extension
29 Sawmill Parkway
30 Sawmill Parkway Extension Phase F
31 Sky View Lane Construction
32 Slack Road Reconstruction
33 South Houk Road Extension
34 Terra Alta Drive
35 US23/Hawthorn Blvd. Intersection & Extension
36 US23/Penny Way Improvement
37 US23/SR315/Stratford Rd Intersection Improvement
38 US36 (E William) Widening
39 Valleyside Drive Extension
40 Vernon Avenue Extension
41 Vista Ridge Drive Extension
42 Wallace Drive Extension
43 Warrensburg/SR 37 Intersection
44 Winterbourne Drive

Removed:

1 Braumiller Road Realignment
2 Curtis Street Extension
3 East Point Crossing Extension
4 Industrial Connector Street
5 Industrial Loop Road
6 Neighborhood Collector Street
7 Neighborhood Collector Street
8 Neighborhood Collector Street
9 Neighborhood Connector Street
10 Pittsburgh Drive Connector
11 Pollyanna Drive Extension
12 Stratford-Pollock Road Connection

Intersection Improvements

Proposed:

1 Berlin Station Road Railway Crossing Removal
2 Braumiller/Berlin Station Intersection
3 Cheshire Road/CSX Crossing
4 Curtis St/Firestone Drive Intersection
5 Glenn Parkway Railroad Grade Separation
6 Houk Road/Greenlawn Drive Turn Lane
7 London Road/Liberty Road Intersection
8 Pittsburgh Drive/Section Line Road Intersection
9 SR37/Channing Street Intersection Improvement
10 SR37/CSX RR Bridge Clearance Improvement
11 SR37/Elizabeth Intersection Improvement
12 SR37/Euclid Ave. Intersection Improvement
13 SR37/US42 (Central/Lake) Intersection
14 SR521/Bowtown Intersection Modification
15 Stratford Road/US23 Intersection modification
16 Stratford/US23 Intersection
17 The Point Improvement
19 US 23/Hull Drive Intersection Modification
20 US23/Cheshire Road Intersection
21 US23/Cheshire Road Intersection Modification
22 US23/Merrick/Panhandle Intersection
23 US36/Carson Farms/Valleyside Dr. Signalization
24 US36/Curtis Street Intersection Improvement
25 US42/Owen Fraley Rd. Intersection Improvement

Complete:

1 Cheshire Road/Winterbourne Intersection
2 Glenn Parkway/Berlin Station Intersection
3 Glenn Parkway/Cheshire Road
4 London Road/Curtis Street Intersection
5 Sandusky/Belle Intersection Signalization
6 SR 37 (Central Ave.)
7 SR 37/Lexington Blvd. Intersection Signal
8 US 23/Cottswold Drive Intersection Modification
9 US 23/N Sandusky Intersection
10 US 36/Delaware Crossing Intersection
11 US23/Glenn Road/Winter Rd Intersection
12 US23/Ohio Health Blvd. Intersection
13 US23/SR315/Stratford Rd Intersection Improvement
14 US36/Cheshire Street Signal
15 US36/Davidson Lane Intersection
16 US36/Glenn Road Intersection Improvement
17 US36/Glenwood Commons Intersection
18 US36/SR521 Intersection Improvement
19 US42/Jegs Blvd. Intersection
20 US42/Sawmill Parkway Intersection

EST 1808 CITY OF DELAWARE OHIO

City of Delaware, Ohio 2020-2040 Thoroughfare Plan Project Summary

Adopted by City Ordinance: 21 – XX'
XX-XX-2021

Last Updated: 02/22/2021

SUMMARIES OF OTHER RELEVANT PLANS

Insight2050 (2015)

In 2014, the Mid-Ohio Regional Planning Commission (MORPC), Columbus 2020, and the Urban Land Institute (ULI) Columbus retained the services of Calthorpe Associates to project future growth in the region over the next 30+ years and to help communities proactively plan for it. In 2015, the insight2050 initiative projected in its initial report that the region would grow by 25% (1 million people) by 2050. The report included scenarios for development and an assessment of how each would impact a range of fiscal, transportation, environmental, public health, and other metrics. More information can be found at www.getinsight2050.org.

Trail System Master Plan, Delaware County (2017)

The Delaware County Trail System Master Plan was created to honor each community's strategic goals and plans while striving for a cohesive and consistent system for the enjoyment of all. The plan recognized the unique nature of Delaware County with its many features, as well as all of the large number of local jurisdictions. The plan promoted healthy communities, greenways and trails, and parks and open spaces.

Bicycle and Pedestrian Master Plan 2027 (2017)

The plan had a 10 year planning timeline and the process included an assessment of existing conditions, a public engagement and visioning process, and recommendations to implement the vision. The plan recommends $14 million in projects to be implemented over the next 10 years.

City Branding (2014) & Wayfinding Plan (2015)

In 2014, the City of Delaware conducted a rebranding effort to help support city-wide communications during a period of growth. The Guide Studio helped the City translate its personality and voice appropriately to the community. City characteristics that were identified were family-oriented, cooperative community, small business core and authentic experiences. In addition to a new logo, the consultants helped create wayfinding, traditional badges and communication templates. A citywide Wayfinding Plan was completed in 2015. A specific Industrial Park Signage Plan was completed in 2018. A Park Wayfinding & Signage Package was completed in 2017.

Building Industry Association of Central Ohio Housing Need Assessment (2018)

Based on Insight2050 projections, the BIA's report concluded that Central Ohio may not be able to accommodate the expected number of new households without major changes. Further, current housing production is only providing a small share of needed new housing. This report concluded that the Columbus MSA and the 10 counties within are projected to gain a million more people from the significant number of jobs expected to be generated through year 2050. There will be a corresponding need for additional housing units to accommodate and realize this job growth.

Access Delaware (2018)

Access Delaware was a research and engagement effort to gain insight from the community about transportation challenges facing the City of Delaware. Additionally, this process aimed to get public opinion on why the "Moving Delaware Forward" levy did not pass. The process used key influence interviews, community forums, and online surveys to hear public input. The process found that residents drive to get around town, roads need work, Delaware can be challenging to drive in, and the levy failed because residents felt overtaxed and it was not well communicated. Recommendations were made as part of the Access Delaware initiative to support the City's case for transportation needs, communicate best practices, and build trust and understanding. The Access Delaware process continues to better plan for current and future transportation needs and to communicate progress to the community.

MORPC Corridors Study (2019)

The Corridor Concepts Study Report was developed from findings in insight2050 focusing on new tools and modeling capacity to guide decisions about where and how to grow, where to invest transit resources and how to balance community goals. The report measured the impact of varying approaches of planning to address expected growth. Additionally, the report set an implementation framework and identified strategies on how the region can advance transit development to best serve the community.

The report includes five corridors selected for their range of growth opportunities, these included the following: East Main Street (SR 256 to Downtown Columbus), Northeast (Polaris Parkway to Downtown Columbus), Northwest (US 33 at Post Rd./Frantz Rd. to Downtown Columbus), Southeast (Rickenbacker International Airport to Downtown Columbus), West Broad Street (Norton Rd. To Downtown Columbus).

MORPC Housing Strategy (2019)

The Mid-Ohio Regional Planning Commission conducted a Regional Housing Strategy that concluded in Summer 2020. It aimed to support a coordinated housing strategy for the region, including investment and policy recommendations to support mixed income neighborhoods and regional growth. The study reviews existing studies, recommends investment priorities, identifies gaps in funding streams, identifies structural impediments and sets forth metrics for individual communities and the region. The work was led by MORPC with a consultant team.

U.S. Route 23 Corridor Strategic Guide (2020)

The U.S. Route 23 Corridor Strategic Guide was a corridor study focusing on Route 23 with the goal of supporting growth throughout Delaware County. The study objectives are to create a shared vision, identify critical infrastructure improvements, craft scenarios and recommend actionable strategies.

Parks and Recreation Needs Assessment (2020)

The City of Delaware and consultant team conducted a Parks and Recreation Needs Assessment that identified existing inventory, market analysis, cost of deliverables, opportunities, and future needs.

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