NOTICE OF WORK SESSION
DELAWARE CITY COUNCIL
MONDAY, APRIL 1, 2019
6:30 P.M.
1 SOUTH SANDUSKY STREET
COUNCIL CHAMBERS

AGENDA

1. ROLL CALL

2. PUBLIC COMMENTS

2. COMPREHENSIVE PLAN UPDATE:

   SHARING THE DISCOVERY PROCESS
   Presenters: Sarah Kelly and Dave Efland
   - Project focus and purpose
   - Public engagement
   - Technical analysis

   FOCUSING ON LAND USE
   Presenters: Sarah Kelly and Dave Efland
   - Development typologies
   - Emerging themes
   - Areas for further study

   DISCUSSION OF OPTIONS
   - Development typologies
   - Emerging themes
   - Areas for further study

   DISCUSSION/HIGHLIGHTING NEXT STEPS

3. ADJOURNMENT

EST 1808
CITY OF
DELAWARE
OHIO

MEMORANDUM

TO: Mayor Riggle and Members of City Council
FROM: R. Thomas Homan, City Manager
DATE: March 28, 2019
RE: Manager's Comments on April 1, 2019 Council Work Session

Attached is the agenda for Monday's (04/01/19) Council Work Session, the topic of which is the Comprehensive Plan Update. This session will be led by Planning Director Dave Efland and Sarah Kelly from Planning Next, the lead consultant for the project.

The packet can be viewed HERE and includes the following information:

- Economic Baseline Assessment
- Round 1 Public Engagement Summary
- Existing Land Use Analysis detailed information
- Special Areas Initial Land Use Concepts.

Dave and Sarah will present an overview of the Steering Committee's work to date and will set the stage for the Special Area land use exercise, which will be the focus of the second half of the session. According to Dave, "*It is important to note that the development scenarios that are part of the exercise were arrived at after public input and Steering Committee input from work the Committee performed in December. The Planning team then developed the concepts to test some basic, but very different, development and land use alternatives for both Special Areas in an effort to receive feedback from Council, the Steering Committee (on-going and discussion slated for April 9th Steering Committee meeting), and then the general public via on-line exercises (TBD).*

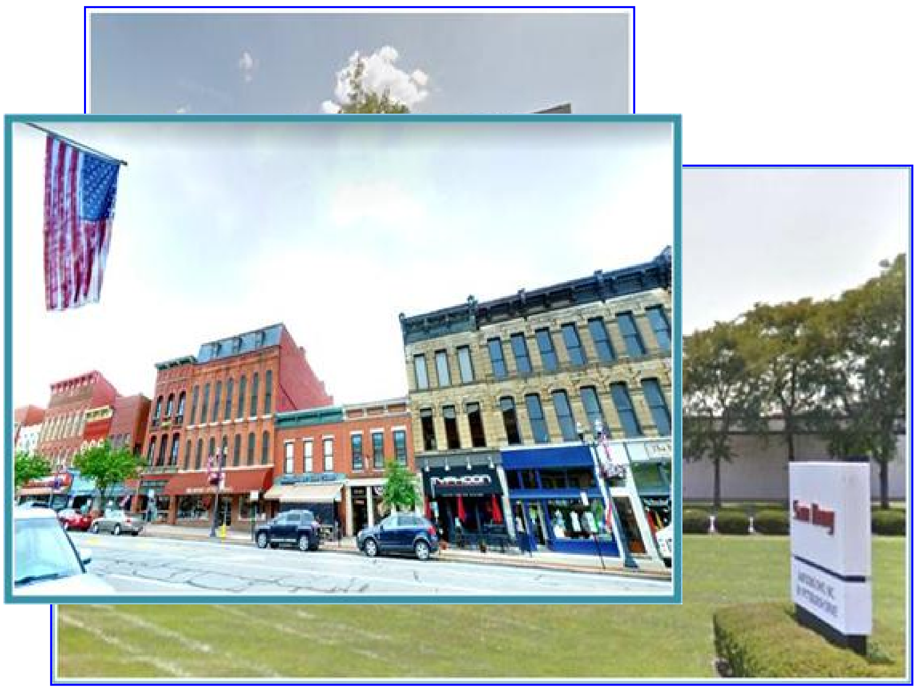
While these are the two special areas clearly identified through the process so far for a variety of reasons, they will not be the only focus of the plan. They do represent the two primary large areas for potential new development as opposed to infill or redevelopment special areas which we will study later in the process. We look forward to Monday and receiving Council's input."

Please let me know if you have any questions.

cc: Directors

Delaware Together

Economic Baseline Assessment



March 2019
Prepared for Planning NEXT
and the City of Delaware

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INTRODUCTION

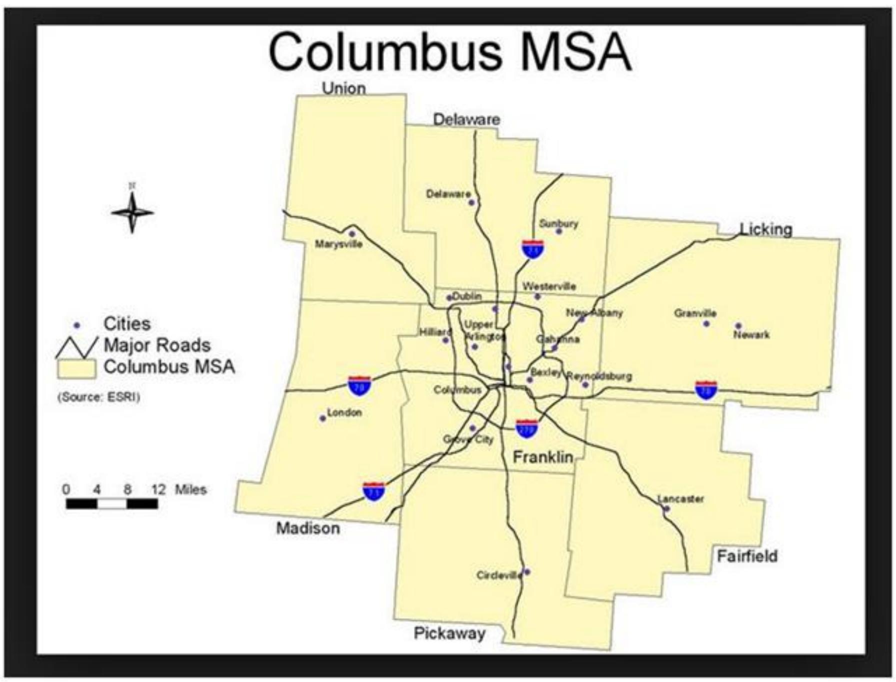
This report presents findings on the city of Delaware's economic and demographic base as an input to broader economic development and city-wide planning, especially future land use planning. The Baseline Assessment provides regional context, along with an overview of local demographic and economic trends. 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

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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.

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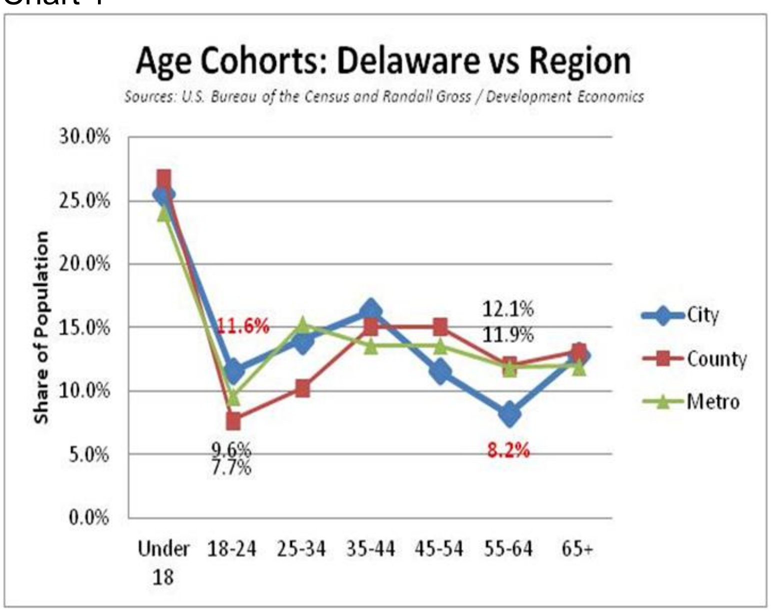
Table 1.	KEY DEMOGRAPHIC TRENDS, DELAWARE, 2000-2015/16				
				Annual Change	
Factor	**2000**	**2010**	**2016/17**	**2000-10**	**2010-17**
Population	**25,243**	**34,753**	**39,363**	**3.8%**	**1.9%**
County	109,989	174,214	200,464	5.8%	2.2%
Metro	1,612,694	1,836,536	1,995,004	1.4%	1.2%
Households	**9,560**	**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



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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.

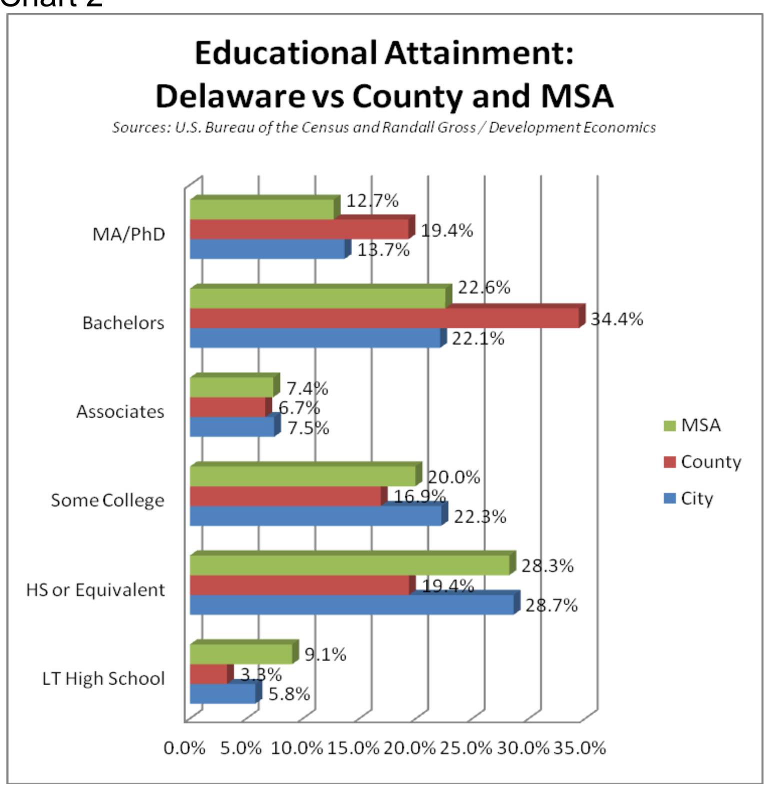
Ethnic & Language Diversity

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



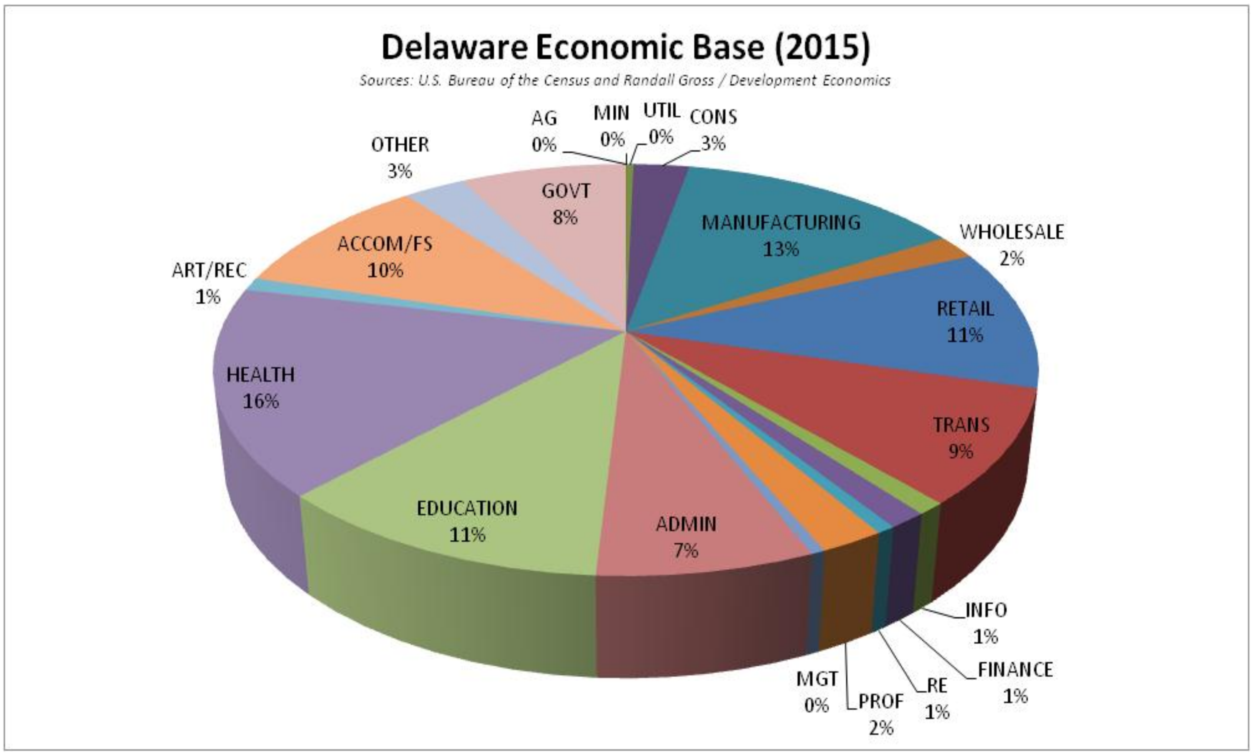
Section 2. ECONOMIC BASE & EMPLOYMENT TRENDS

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,

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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 &

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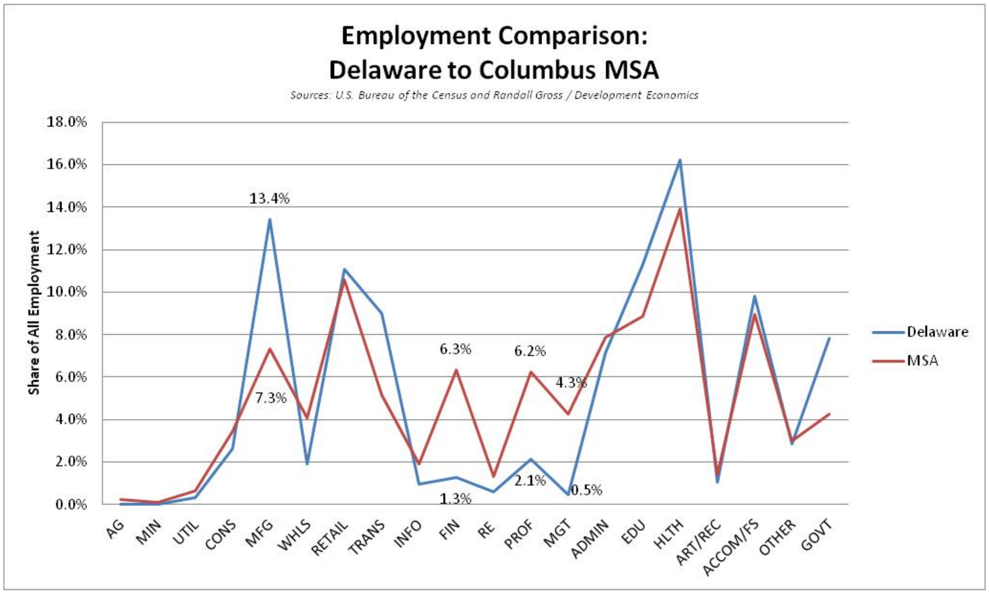
technical, management) tend to be “brain-intensive” ones that require higher levels of education

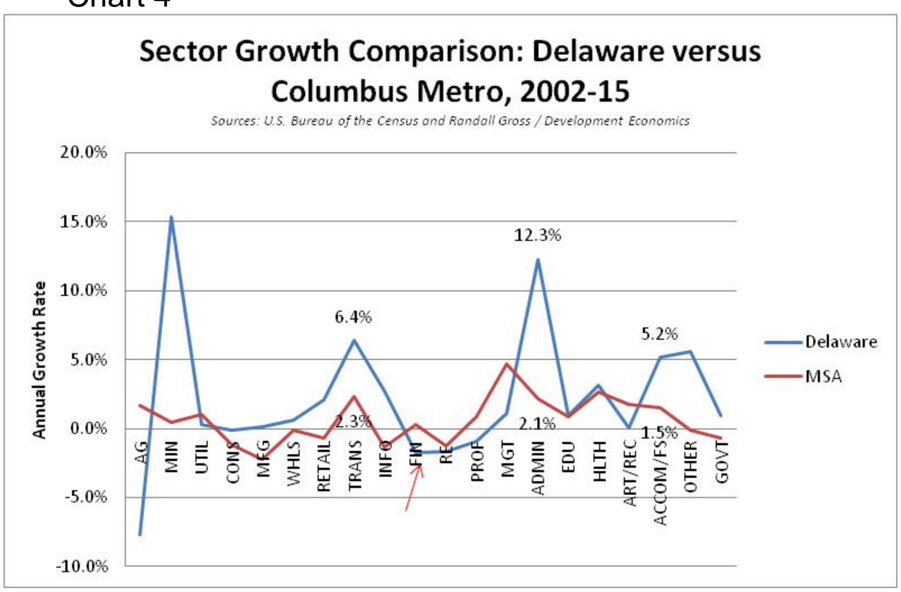
Chart 3



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

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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.

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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.

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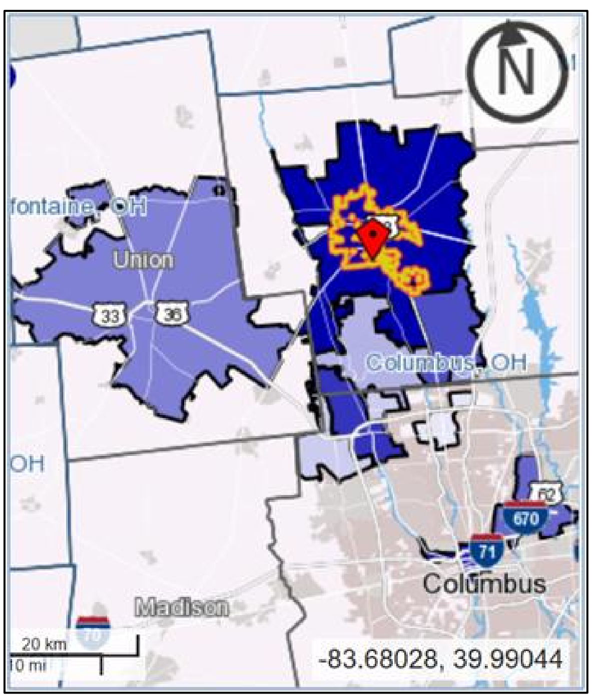
Section 3. DELAWARE LABOR MARKET & COMMUTATION PATTERNS

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:

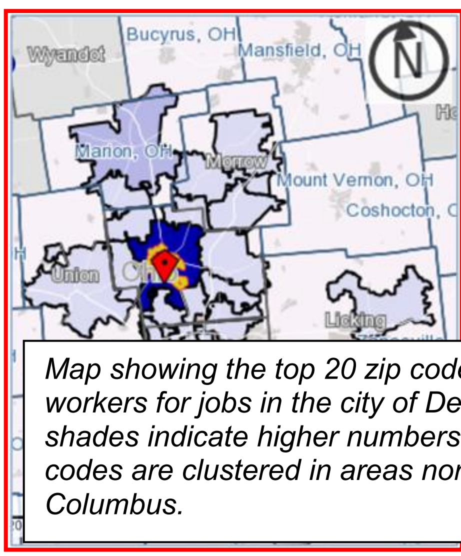
1. 43015: 22% (Delaware)
2. 43215: 5% (Columbus)
3. 43017 4% (Dublin)
4. 43035 3% (Polaris)
5. 43219 3% (Columbus)
6. 43040 3% (Marysville)
7. 43240 3% (Sunbury)

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.

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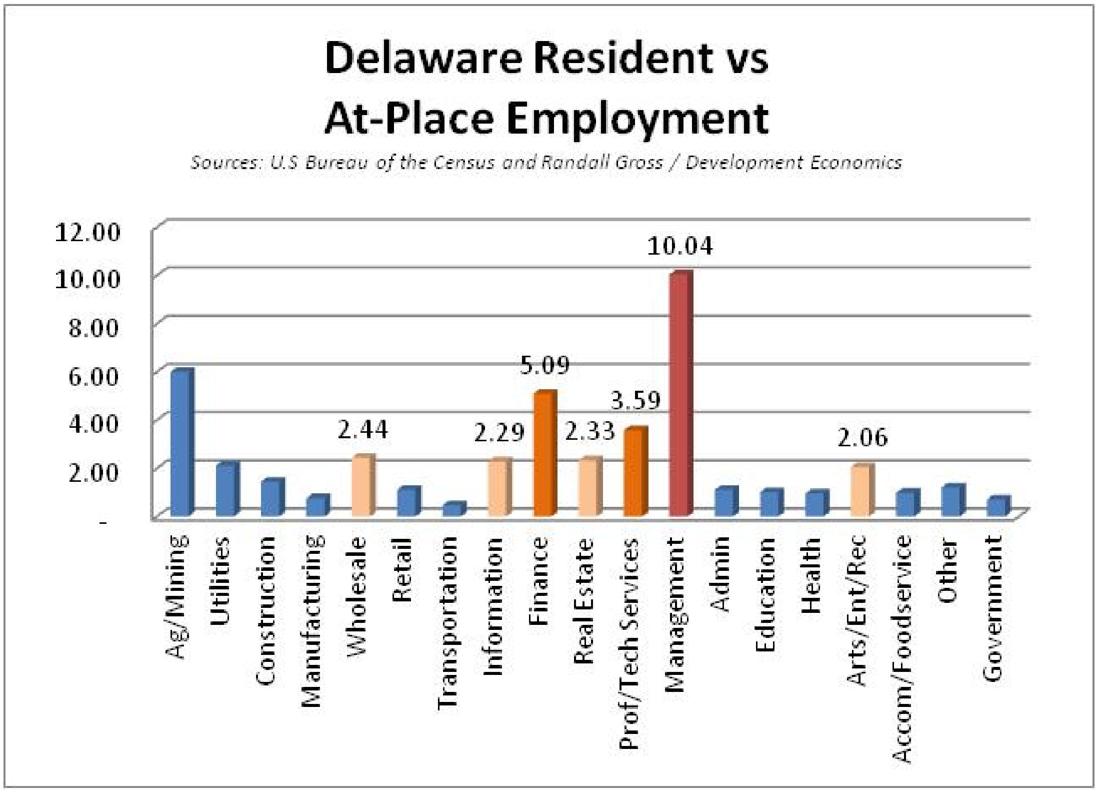
The Labor Market Imbalance

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).

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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

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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.

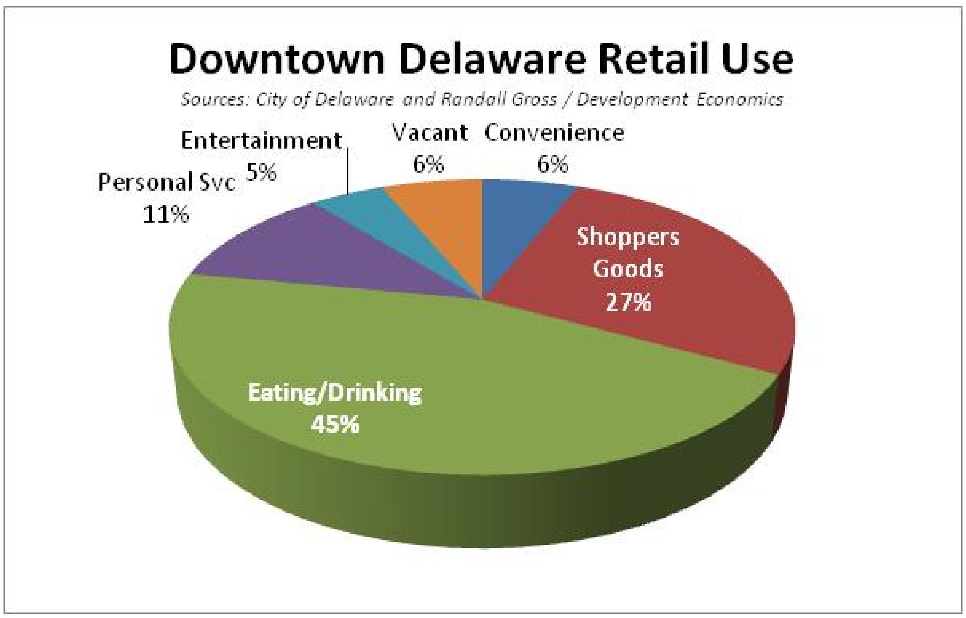
Polaris

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

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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.

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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

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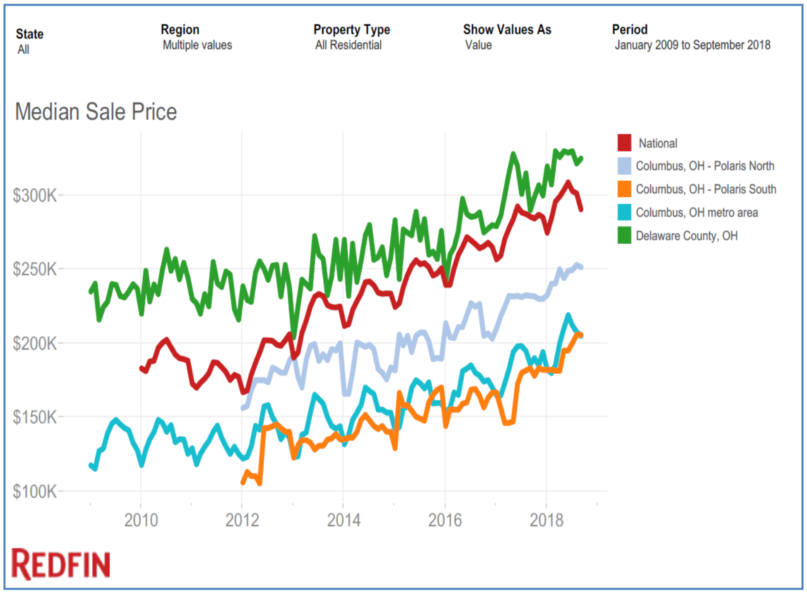
increasing at a slower pace than those in the metro area as a whole, with Delaware prices up by 35% since 2009 compared with 78% metro-wide. Delaware County housing prices have been increasing roughly in tandem with (but slightly higher than) the national housing market since 2013, according to data 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.

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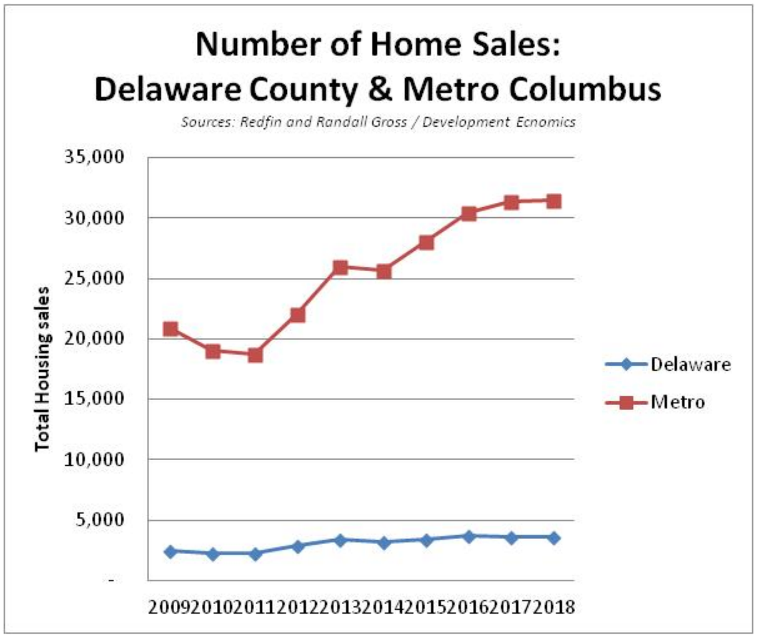
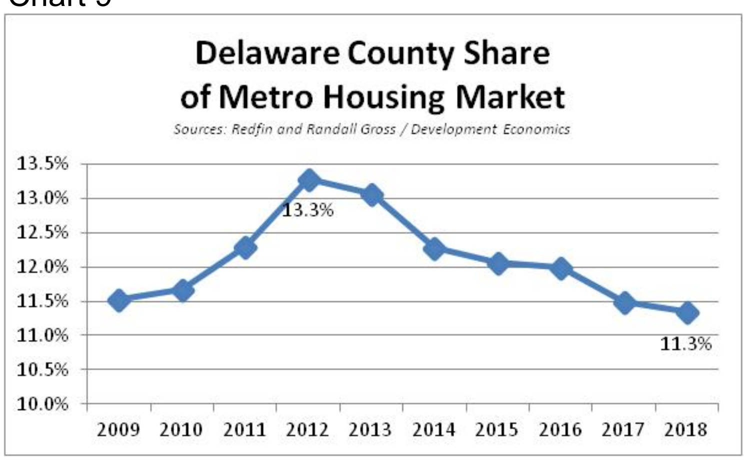
Chart 8



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.

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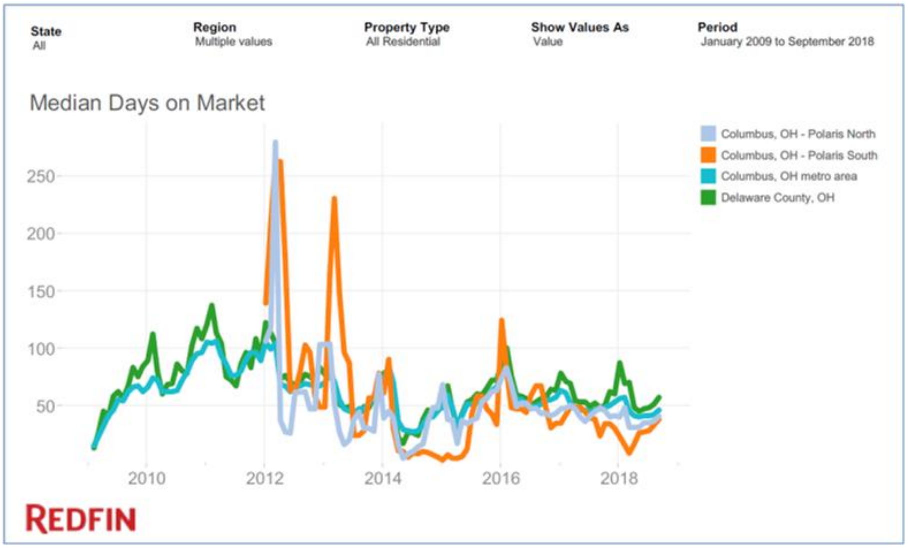
Chart 10

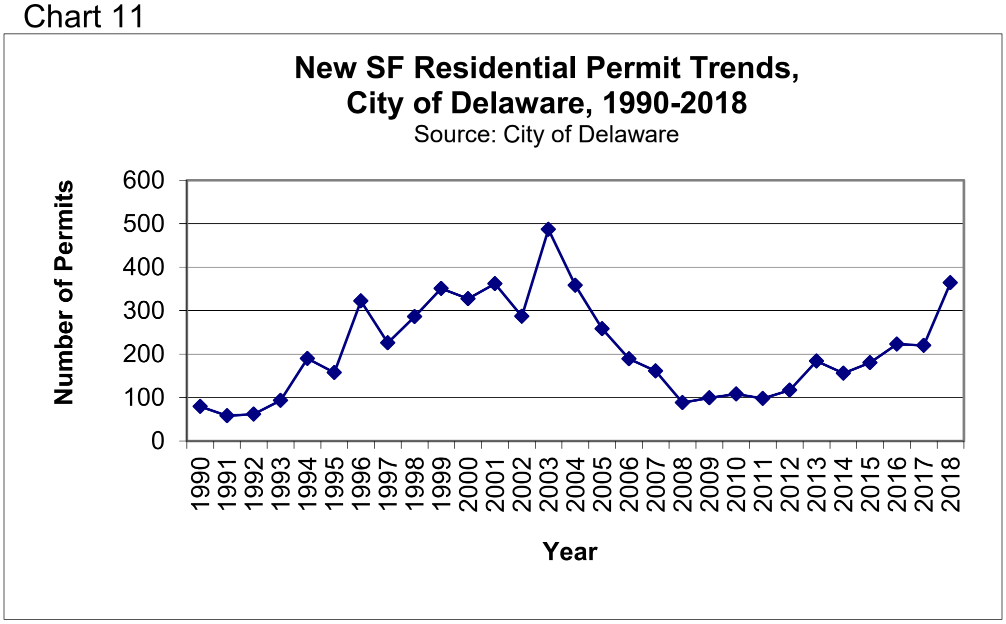


The amount of time required to sell a house is slightly longer in Delaware County than in the Columbus MSA as a whole. “Spikes” in selling time (as in the Polaris area) occurred when there were large new projects that opened up sales on the market, with the flood of new supply increasing the time required 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



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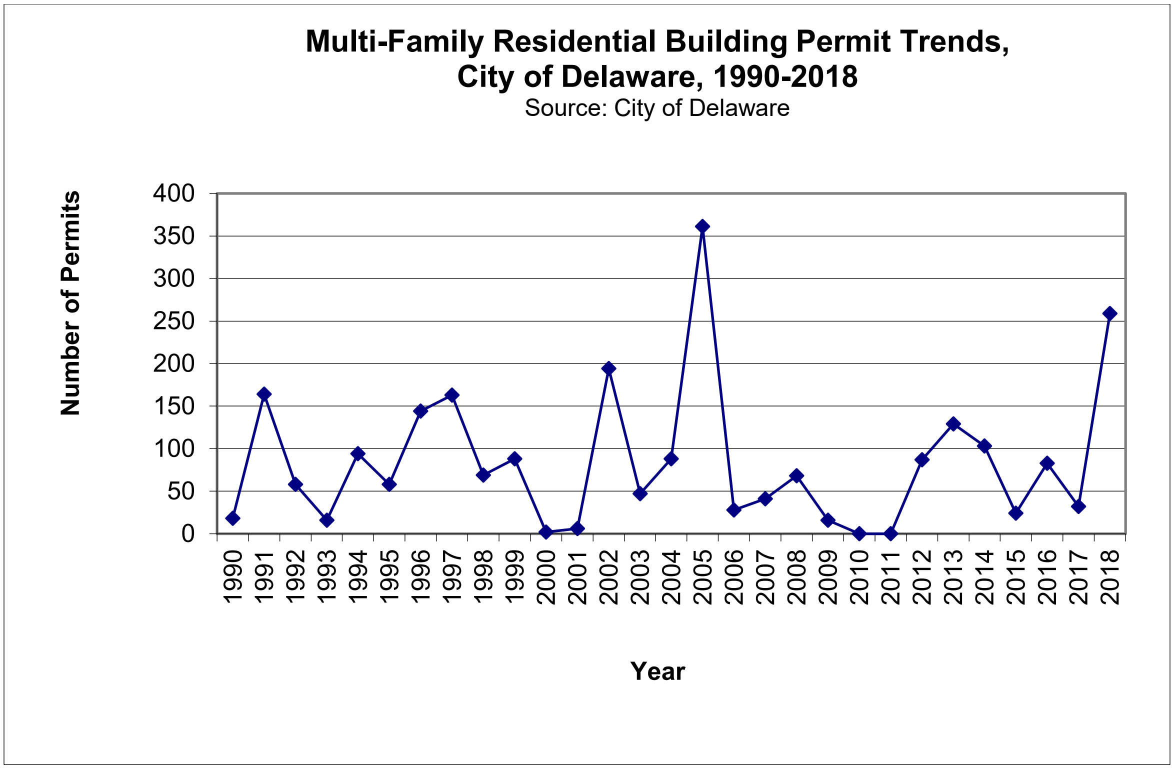
Single-family residential construction continued to fall between 2003 and 2008, when the city's and nation's housing market reached a nadir and began a slow recovery from a deep recession. While Delaware's single-family housing permits jumped to 364 by the end of 2018, single-family construction has 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.

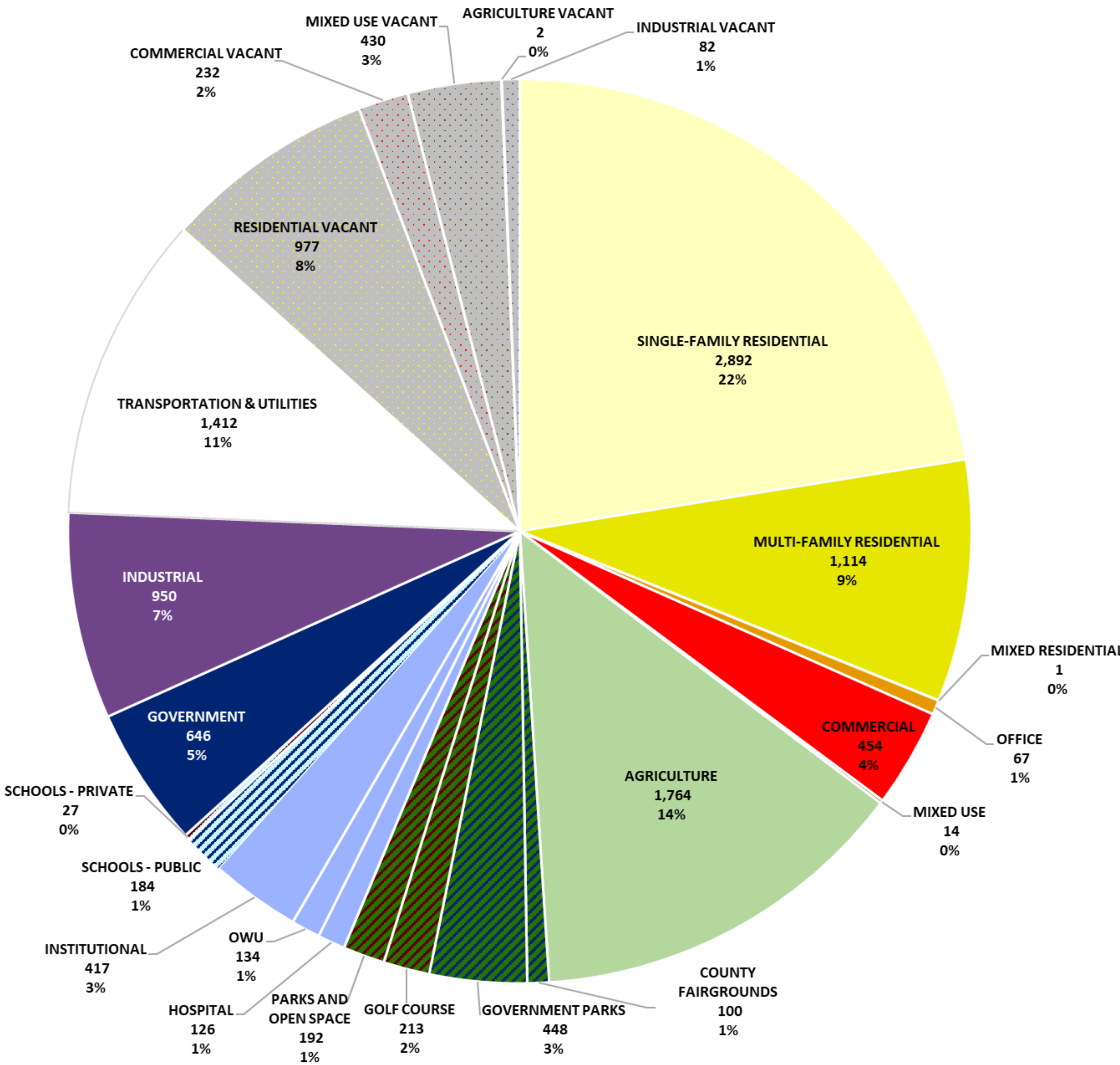
Land Use Analysis

City of Delaware
11-28-2018

LAND USE

Within City Boundaries

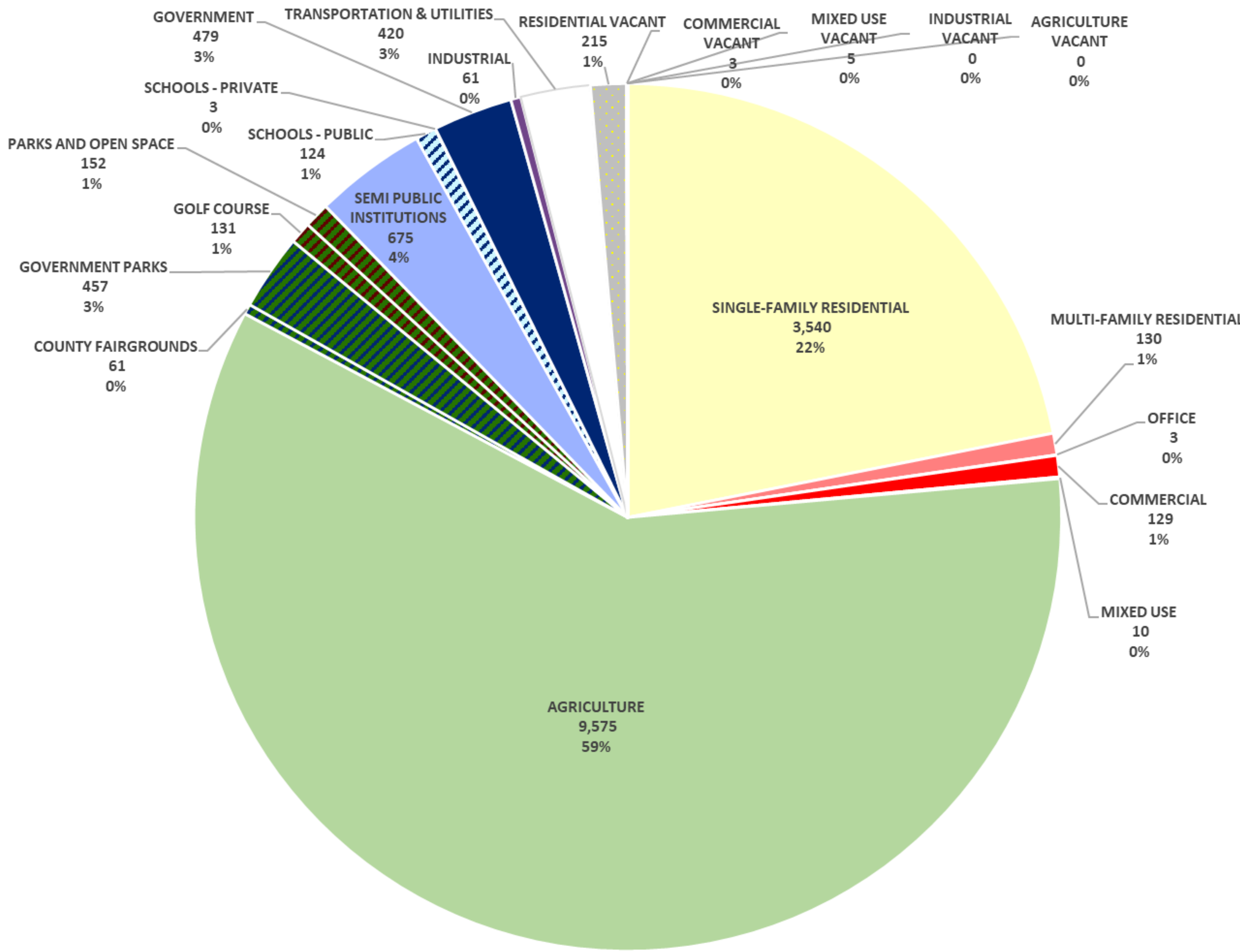
LAND USE		NUMBER OF PARCELS	MINIMUM PARCEL SIZE	MAXIMUM PARCEL SIZE	AVERAGE PARCEL SIZE	TOTAL ACREAGE
SINGLE-FAMILY RESIDENTIAL		9,854	0.00	137.42	0.29	2,892
MULTI-FAMILY RESIDENTIAL		879	0.01	28.56	1.27	1,114
MIXED RESIDENTIAL		6	0.04	0.21	0.14	1
OFFICE		101	0.01	7.11	0.66	67
COMMERCIAL		360	0.01	18.53	1.26	454
MIXED USE		83	0.01	5.75	0.17	14
AGRICULTURE		62	0.05	204.50	28.44	1,764
PARKS, RECREATION AND OPEN SPACE - PUBLIC	COUNTY FAIRGROUNDS	13	0.24	27.25	7.66	100
	GOVERNMENT PARKS	80	0.01	44.99	5.61	448
PARKS, RECREATION AND OPEN SPACE - PRIVATE	GOLF COURSE	9	0.14	75.04	23.65	213
	PARKS AND OPEN SPACE	99	0.02	17.19	1.94	192
SEMI PUBLIC INSTITUTIONS	HOSPITAL	5	0.50	100.75	25.28	126
	OWU	68	0.02	22.52	1.97	134
	INSTITUTIONAL	143	0.02	71.14	2.92	417
SCHOOLS - PUBLIC		39	0.10	36.31	4.71	184
SCHOOLS - PRIVATE		12	0.09	8.04	2.26	27
GOVERNMENT		162	0.00	239.72	3.99	646
INDUSTRIAL		119	0.02	161.93	7.99	950
TRANSPORTATION & UTILITIES		120	0.00	1,009.71	11.77	1,412
RESIDENTIAL VACANT		467	0.00	113.10	2.09	977
COMMERCIAL VACANT		78	0.00	43.36	2.98	232
MIXED USE VACANT		44	0.09	73.87	9.77	430
AGRICULTURE VACANT		2	0.54	1.93	1.24	2
INDUSTRIAL VACANT		14	0.02	30.27	5.83	82
	TOTALS	**12,819**	-	-	-	**12,879**

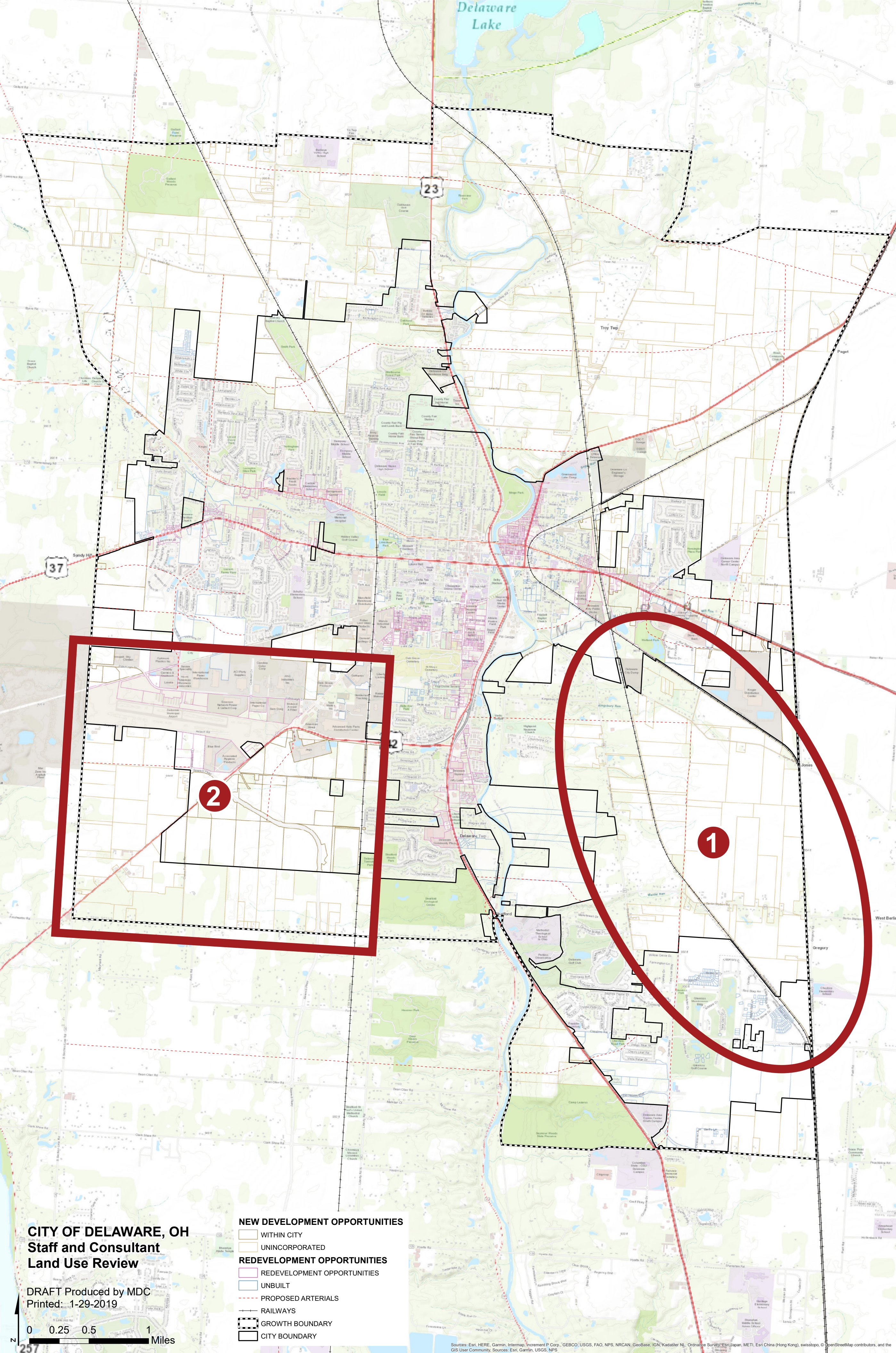


MIXED USE VACANT
430
3%
AGRICULTURE VACANT
2
0%
INDUSTRIAL VACANT
82
1%
COMMERCIAL VACANT
232
2%
RESIDENTIAL VACANT
977
8%
SINGLE-FAMILY RESIDENTIAL
2,892
22%
TRANSPORTATION & UTILITIES
1,412
11%
MULTI-FAMILY RESIDENTIAL
1,114
9%
INDUSTRIAL
950
7%
MIXED RESIDENTIAL
1
0%
GOVERNMENT
646
5%
COMMERCIAL
454
4%
OFFICE
67
1%
AGRICULTURE
1,764
14%
MIXED USE
14
0%
SCHOOLS - PRIVATE
27
0%
SCHOOLS - PUBLIC
184
1%
INSTITUTIONAL
417
3%
OWU
134
1%
COUNTY FAIRGROUNDS
100
1%
HOSPITAL
126
1%
PARKS AND OPEN SPACE
192
1%
GOLF COURSE
213
2%
GOVERNMENT PARKS
448
3%

Unincorporated – Growth Boundary

LAND USE		NUMBER OF PARCELS	MINIMUM PARCEL SIZE	MAXIMUM PARCEL SIZE	AVERAGE PARCEL SIZE	TOTAL ACREAGE
SINGLE-FAMILY RESIDENTIAL		1,649	0.00	62.53	2.15	3,540
MULTI-FAMILY RESIDENTIAL		47	0.14	20.19	2.77	130
OFFICE		2	0.58	2.53	1.55	3
COMMERCIAL		38	0.00	13.31	3.39	129
MIXED USE		2	2.09	8.02	5.06	10
AGRICULTURE		321	0.00	289.74	29.83	9,575
PARKS, RECREATION AND OPEN SPACE - PUBLIC	COUNTY FAIRGROUNDS	5	0.16	46.26	12.18	61
	GOVERNMENT PARKS	12	0.25	103.93	38.08	457
PARKS, RECREATION AND OPEN SPACE - PRIVATE	GOLF COURSE	9	3.33	50.18	14.53	131
	PARKS AND OPEN SPACE	8	0.01	137.20	19.02	152
SEMI PUBLIC INSTITUTIONS	INSTITUTIONAL	30	0.00	157.48	22.50	675
SCHOOLS - PUBLIC		7	4.30	49.02	17.77	124
SCHOOLS - PRIVATE		1	2.54	2.54	2.54	3
GOVERNMENT		25	0.03	102.93	19.17	479
INDUSTRIAL		12	0.00	23.84	5.06	61
TRANSPORTATION & UTILITIES		64	0.00	57.27	6.56	420
RESIDENTIAL VACANT		130	0.00	23.57	1.65	215
COMMERCIAL VACANT		5	0.11	1.45	0.51	3
MIXED USE VACANT		1	4.53	4.53	4.53	5
AGRICULTURE VACANT		1	0.04	0.04	0.04	0
INDUSTRIAL VACANT		1	0.00	0.00	0.00	0
TOTALS		**2,370**	-	-	-	**16,171**


GOVERNMENT
479
3%
TRANSPORTATION & UTILITIES
420
3%
RESIDENTIAL VACANT
215
1%
COMMERCIAL VACANT
3
0%
MIXED USE VACANT
5
0%
INDUSTRIAL VACANT
0
0%
AGRICULTURE VACANT
0
0%
INDUSTRIAL
61
0%
SCHOOLS - PRIVATE
3
0%
SCHOOLS - PUBLIC
124
1%
PARKS AND OPEN SPACE
152
1%
SEMI PUBLIC INSTITUTIONS
675
4%
GOLF COURSE
131
1%
GOVERNMENT PARKS
457
3%
COUNTY FAIRGROUNDS
61
0%
SINGLE-FAMILY RESIDENTIAL
3,540
22%
MULTI-FAMILY RESIDENTIAL
130
1%
OFFICE
3
0%
COMMERCIAL
129
1%
MIXED USE
10
0%
AGRICULTURE
9,575
59%



Special Areas

Initial Concepts

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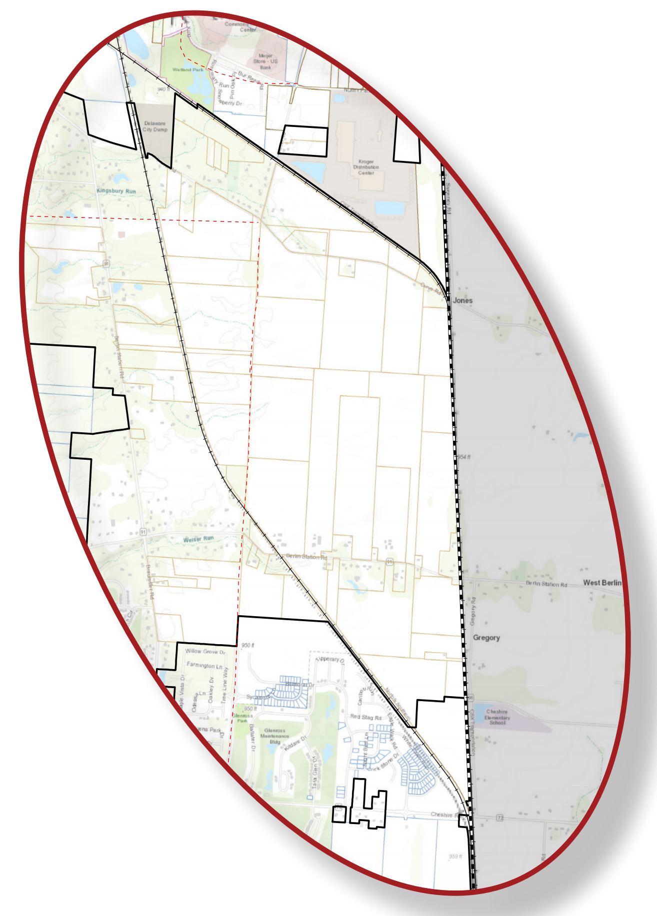
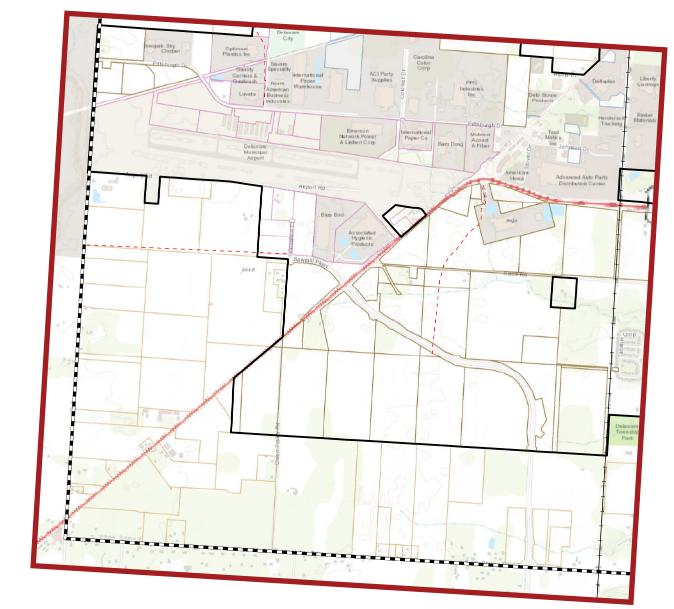
Review of public input and land use analysis have identified two key growth areas for more detailed development concepts. Because these are larger undeveloped sites, the character for these areas has not been established. These areas are:

1. South Eastern District
2. South Western District

City staff and consultants have drafted a series of alternative development concepts for these two areas, which are shown on the following pages. Review the following alternatives for each area and provide your feedback as to what alternatives you feel are most appropriate for Delaware's future. Feel free to suggest additional alternative concepts outside of the ones provided.





1 ***SOUTH EASTERN DISTRICT***

2 ***SOUTH WESTERN DISTRICT***

We ask that you read through the following sections and provide your feedback. Any additional comments are appreciated and will help us continue developing the plan's land use recommendations.

In this exercise you will:

1. *Review the preliminary concept alternatives for these two special areas, and provide feedback based on your reaction to the concept alternative.*
2. *Provide any additional comments or suggestions (such as additional alternatives).*

Special Area 1

South Eastern District

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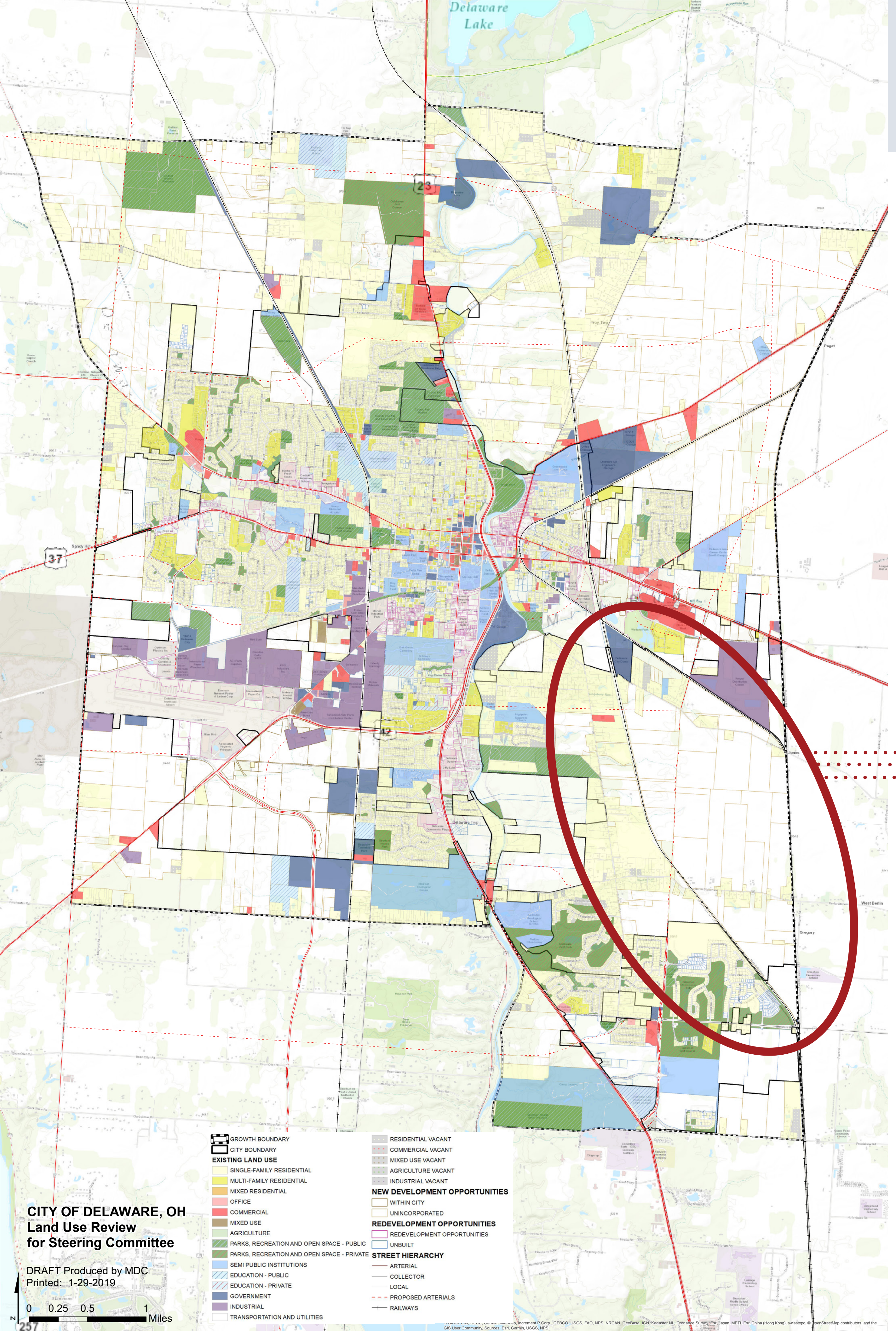

CONCEPT ALTERNATIVE 1.A.
LINEAR MIXED USE CORRIDOR

A linear development concept would focus the most intense development along the future Glenn Parkway extension. This concept would allow for commercial and mixed use development along the Glenn Parkway extension. Surface parking would sit between the buildings and Glenn Parkway, and landscaping buffers would be used between adjacent neighborhoods. Walkability and connectivity would also be ensured. Uses would transition from suburban commercial to rural residential as it is located farther away from Glenn Parkway. Large to medium "blocks" with some curvilinear streets would continue the suburban character found in other portions of Delaware while allowing a mixture of uses.

CONCEPT ALTERNATIVE 1.B.
NEIGHBORHOOD CENTERS

The Neighborhood Centers concept establishes multiple mixed-use neighborhood or community scale activity centers integrated with their surrounding medium and low density neighborhoods in both pattern and character. Neighborhood Activity Centers provide a local destination for an area of around 1 mile and are generally pedestrian oriented with very limited parking. This multi-nodal distribution would theoretically reduce the number of trips to move across the city to meet daily needs and produce a more walkable and connected community potentially less reliant on automobiles. The rural character of the future Glenn Parkway extension could be protected with a narrow street profile and deep set back front yards. Most activity centers should be located at a crossroads of collectors to increase visibility or around access controlled intersections on Glenn Parkway.

CONCEPT ALTERNATIVE 1.C.
URBAN/SUBURBAN VILLAGE

A village concept seeks to establish a complete single-nodal village in a pattern similar to how Delaware historically developed in its core area, as a denser core with smaller blocks with neighborhoods that get slightly less intense in use the further from the center. A gridded street network ensures all roads serve the same role. Alleyways could be encouraged. This alternative could be built with a more urban character and slightly taller buildings and more density than the historic downtown. The goal would not be to reproduce downtown but to allow blocks and character similar to it or with a more suburban character akin to the other newer neighborhoods in Delaware. The two characters are illustrated using the same general land use plan as 1.C.1: Urban Village, and 1.C.2: Suburban Village.

Concept Alternative 1.A.

Details and Examples

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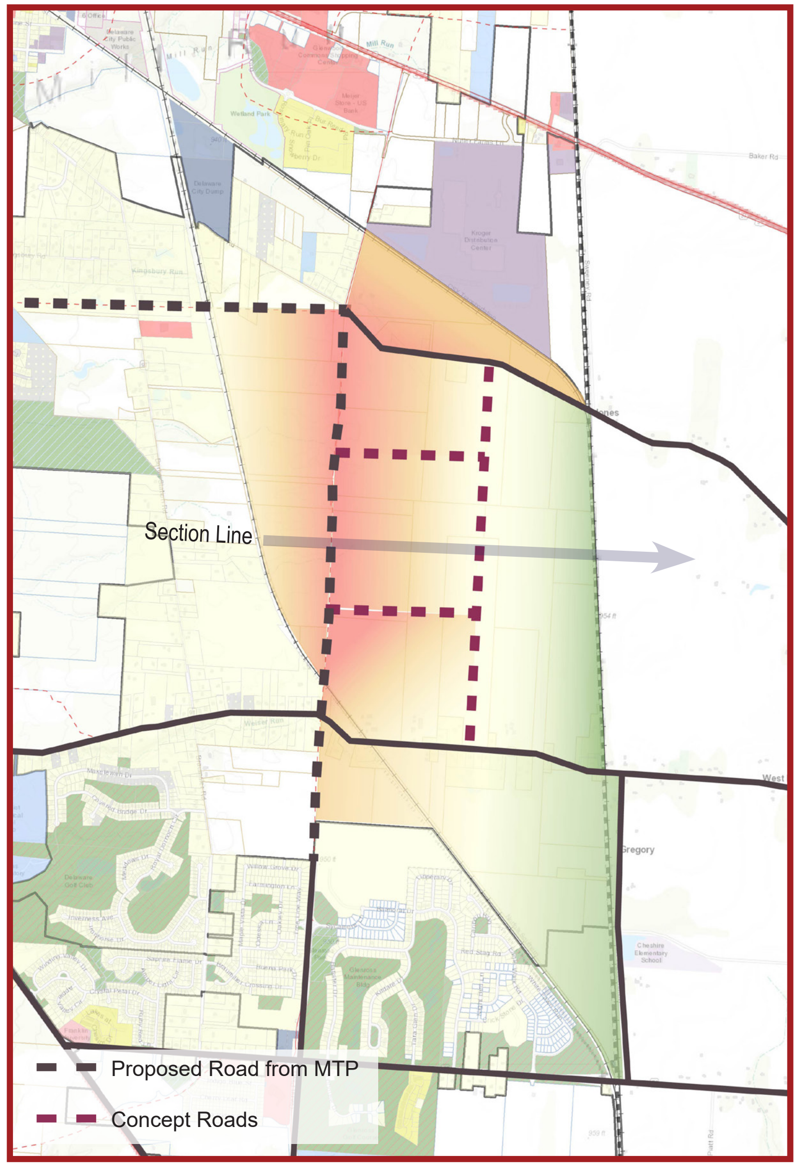
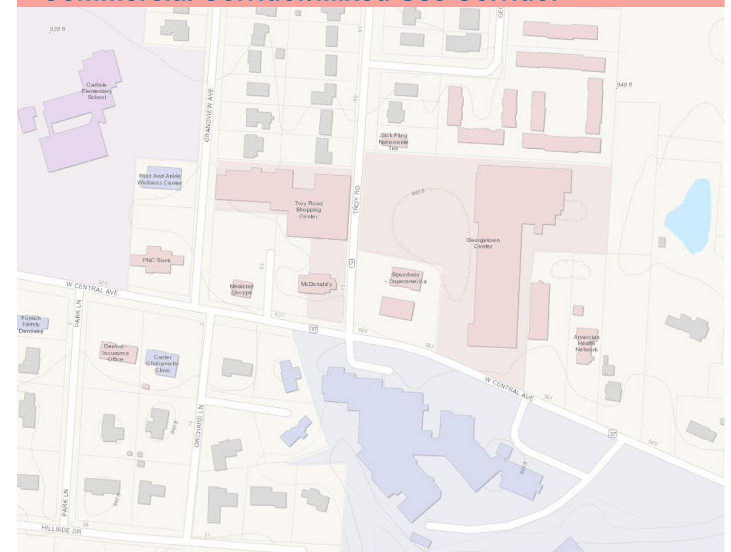


LINEAR MIXED USE CORRIDOR

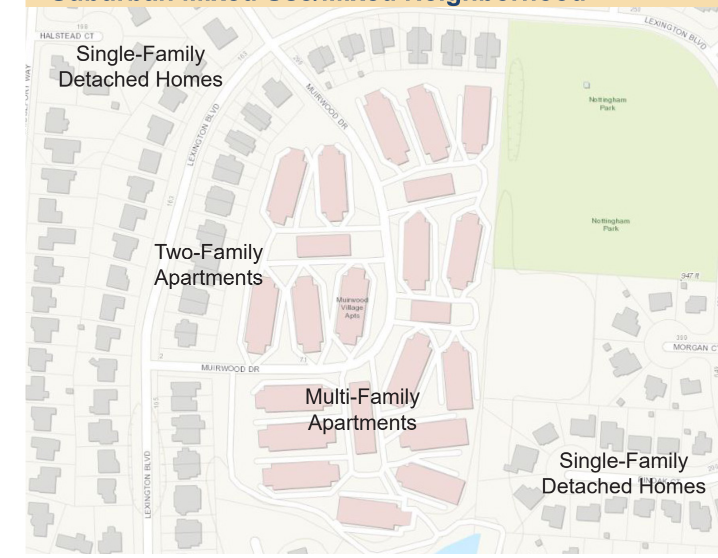
A linear development concept would focus the most intense development along the future Glenn Parkway extension. This concept would allow for commercial and mixed use development along the Glenn Parkway extension. Surface parking would sit between the buildings and Glenn Parkway, and landscaping buffers would be used between adjacent neighborhoods. Walkability and connectivity would also be ensured. Uses would transition from suburban commercial to rural residential as it is located farther away from Glenn Parkway. Large to medium "blocks" with some curvilinear streets would continue the suburban character found in other portions of Delaware while allowing a mixture of uses.

AERIAL OF DEVELOPMENT TYPES

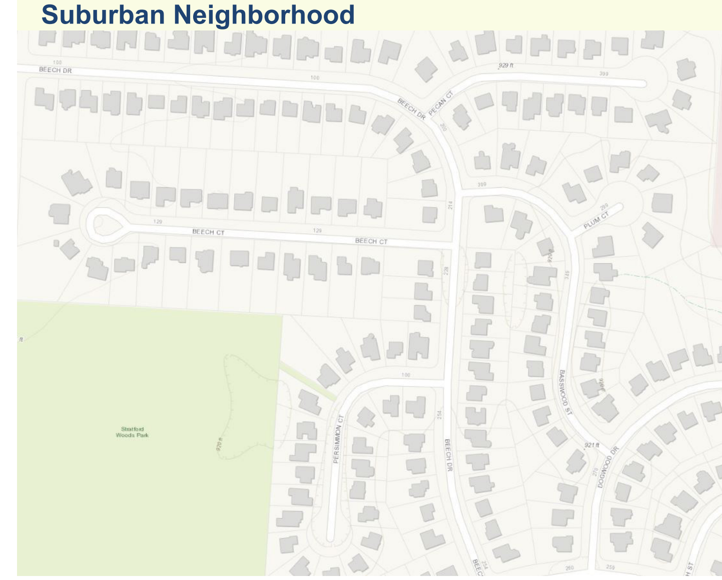
Commercial Corridor/Mixed Use Corridor



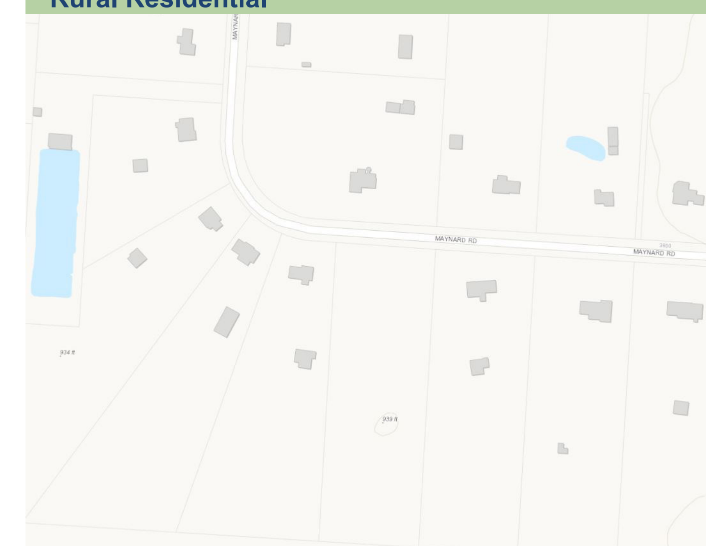
Suburban Mixed Use/Mixed Neighborhood



Suburban Neighborhood



Rural Residential

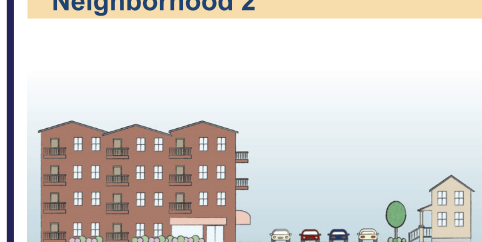


SECTION EXAMPLES

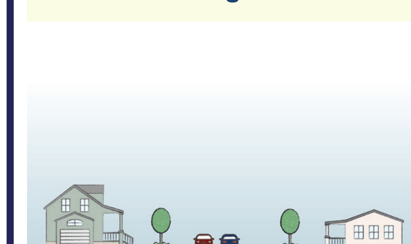
Traditional Neighborhood

Commercial Corridor/Mixed Use Corridor

Suburban Mixed Use/Mixed Neighborhood 2



Suburban Neighborhood



Rural Residential

Section Line

Concept Alternative 1.B.

Details and Examples

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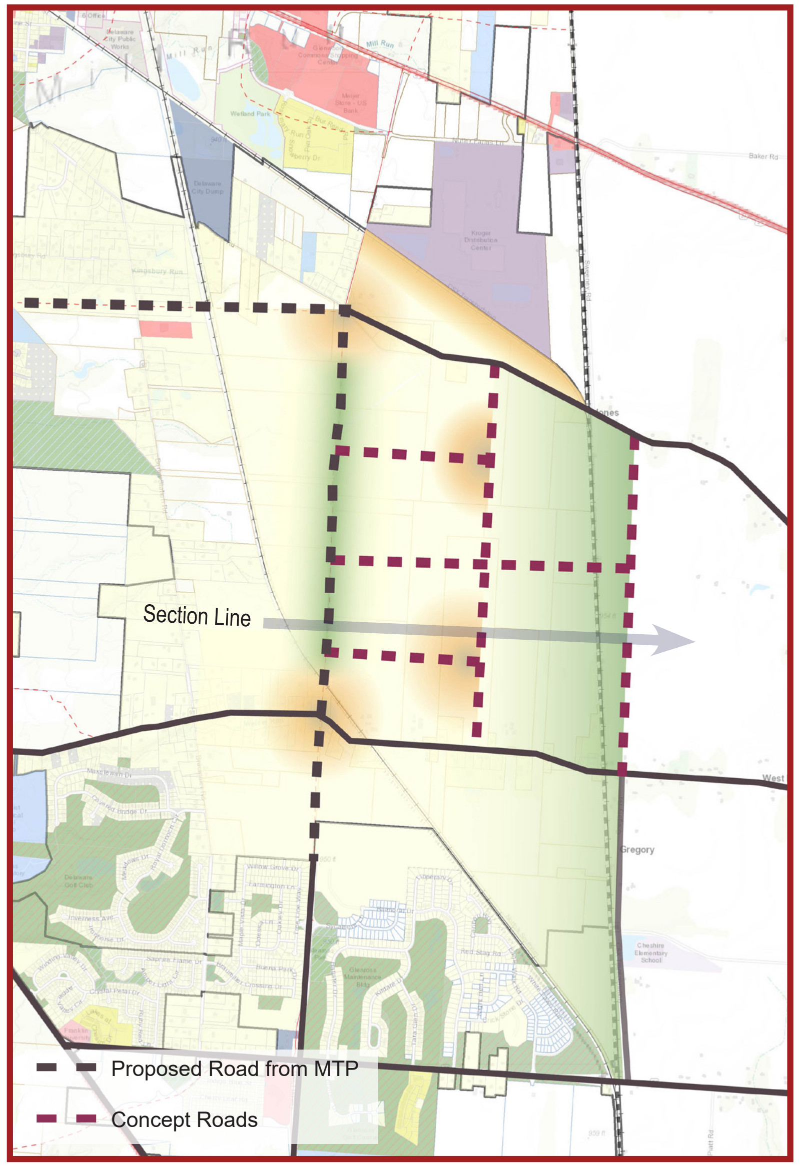
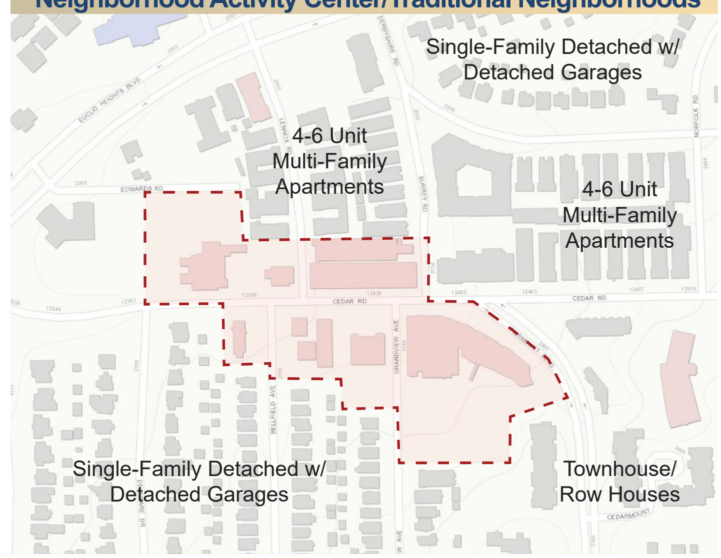


NEIGHBORHOOD CENTERS

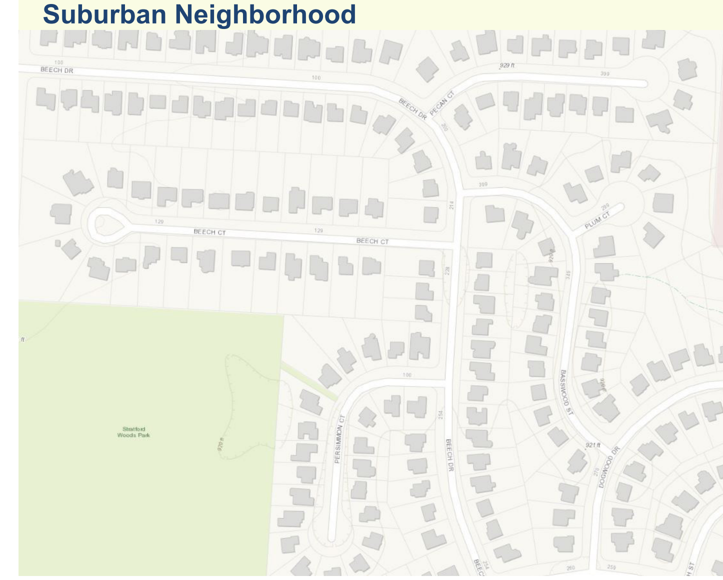
The Neighborhood Centers concept establishes multiple mixed-use neighborhood or community scale activity centers integrated with their surrounding medium and low density neighborhoods in both pattern and character. Neighborhood Activity Centers provide a local destination for an area of around 1 mile and are generally pedestrian oriented with very limited parking. This multi-nodal distribution would theoretically reduce the number of trips to move across the city to meet daily needs and produce a more walkable and connected community potentially less reliant on automobiles. The rural character of the future Glenn Parkway extension could be protected with a narrow street profile and deep set back front yards. Most activity centers should be located at a crossroads of collectors to increase visibility or around access controlled intersections on Glenn Parkway.

AERIAL OF DEVELOPMENT TYPES

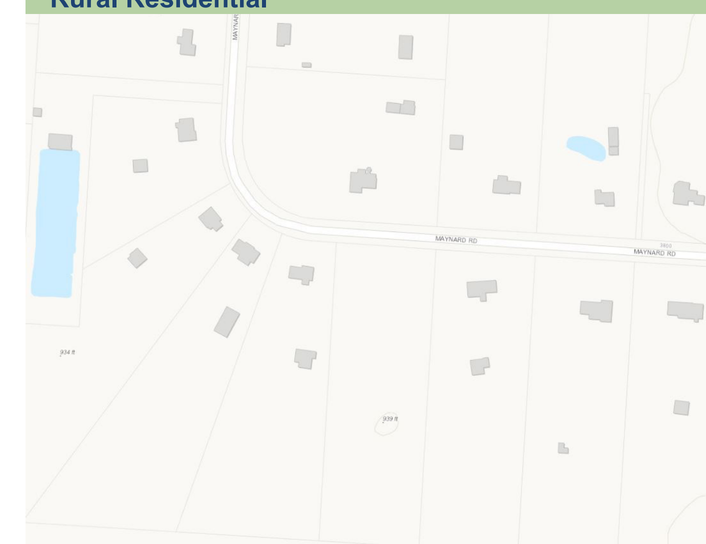
Neighborhood Activity Center/Traditional Neighborhoods



Suburban Neighborhood

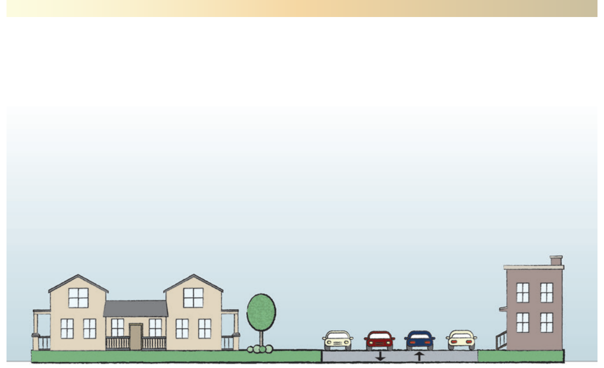


Rural Residential

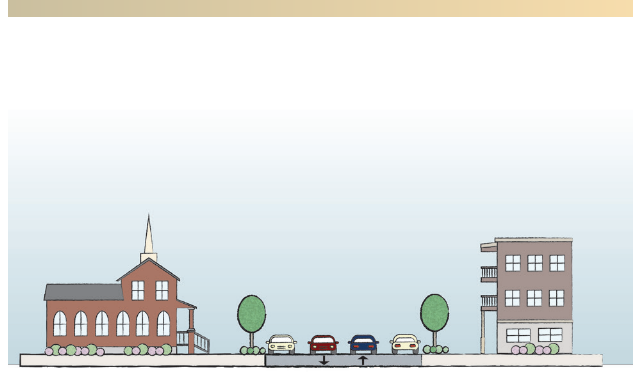


SECTION EXAMPLES

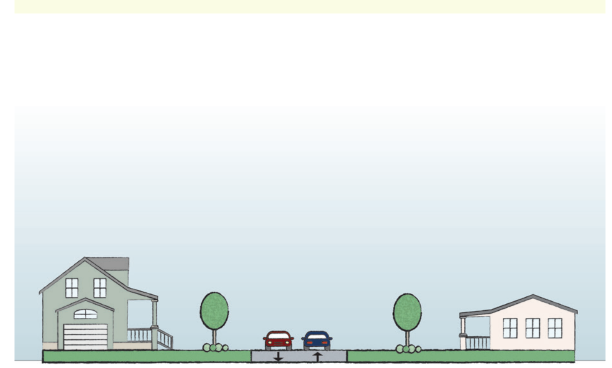
Traditional Neighborhood



Neighborhood Activity Center



Suburban Neighborhood



Rural Residential

Section Line

Concept Alternative 1.C.1.

Details and Examples

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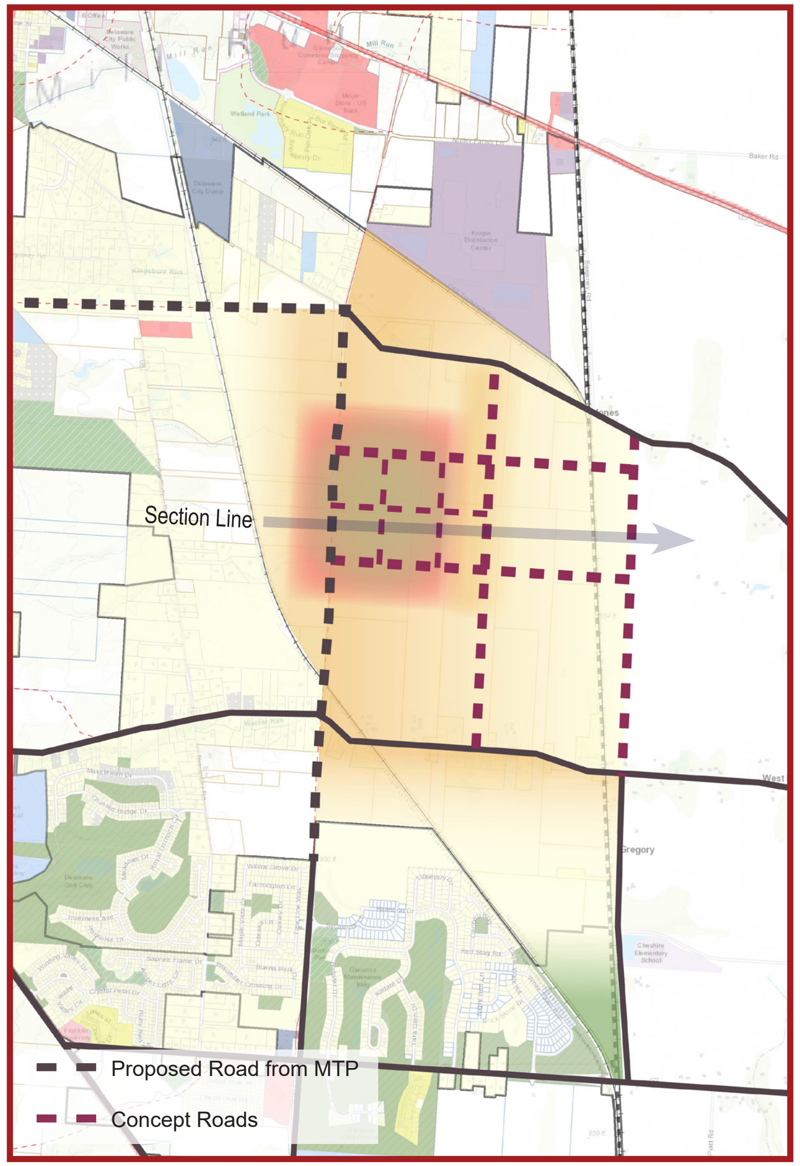
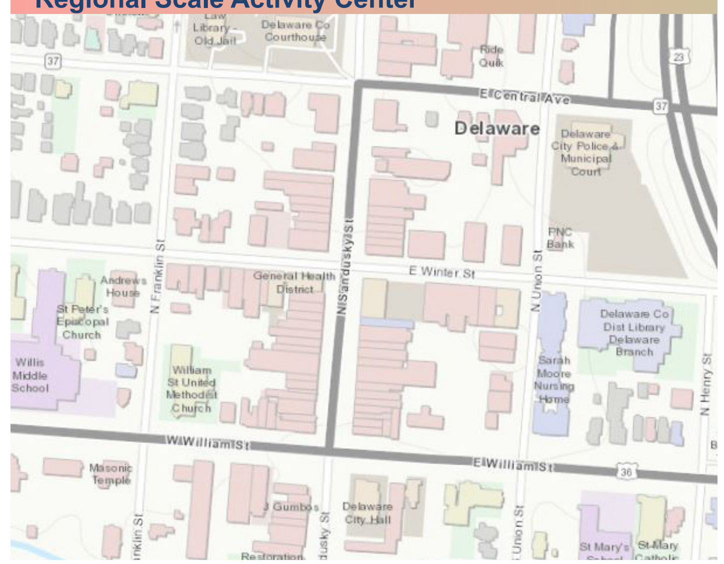


URBAN VILLAGE

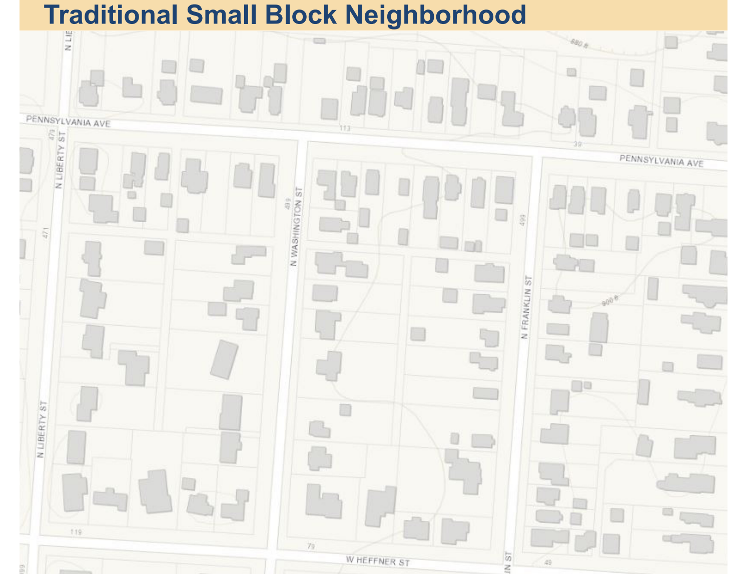
A village concept seeks to establish a complete single nodal village in a pattern similar to how Delaware historically developed, as a denser core with smaller blocks, and neighborhoods that get slightly less intense in use further from the center. A gridded street network ensures all roads serve the same role. Alleyways are encouraged. This option proposes a more urban character with a more compact subdivision of land. Maximum building heights in the core could be up to 6 stories.

AERIAL OF DEVELOPMENT TYPES

Regional Scale Activity Center



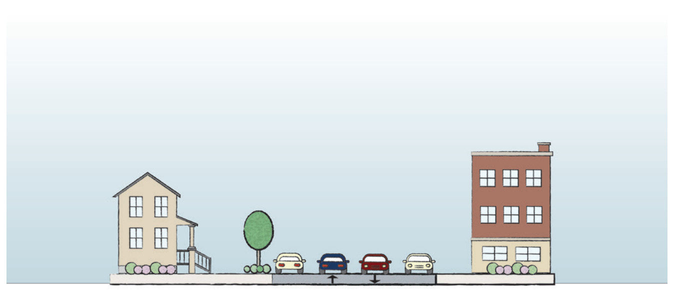
Traditional Small Block Neighborhood



Traditional Large Block Neighborhood

SECTION EXAMPLES

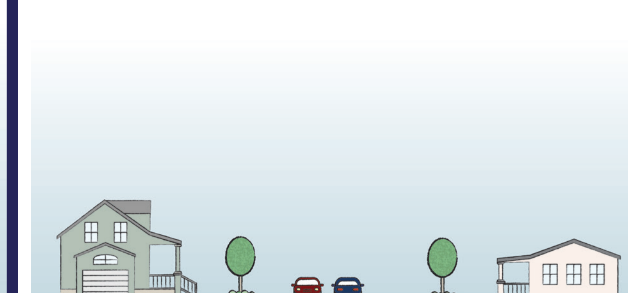
Neo-Traditional Small Block Neighborhood 2



Regional Scale Activity Center

Neo-Traditional Small Block Neighborhood 1

Traditional Large Block Neighborhood



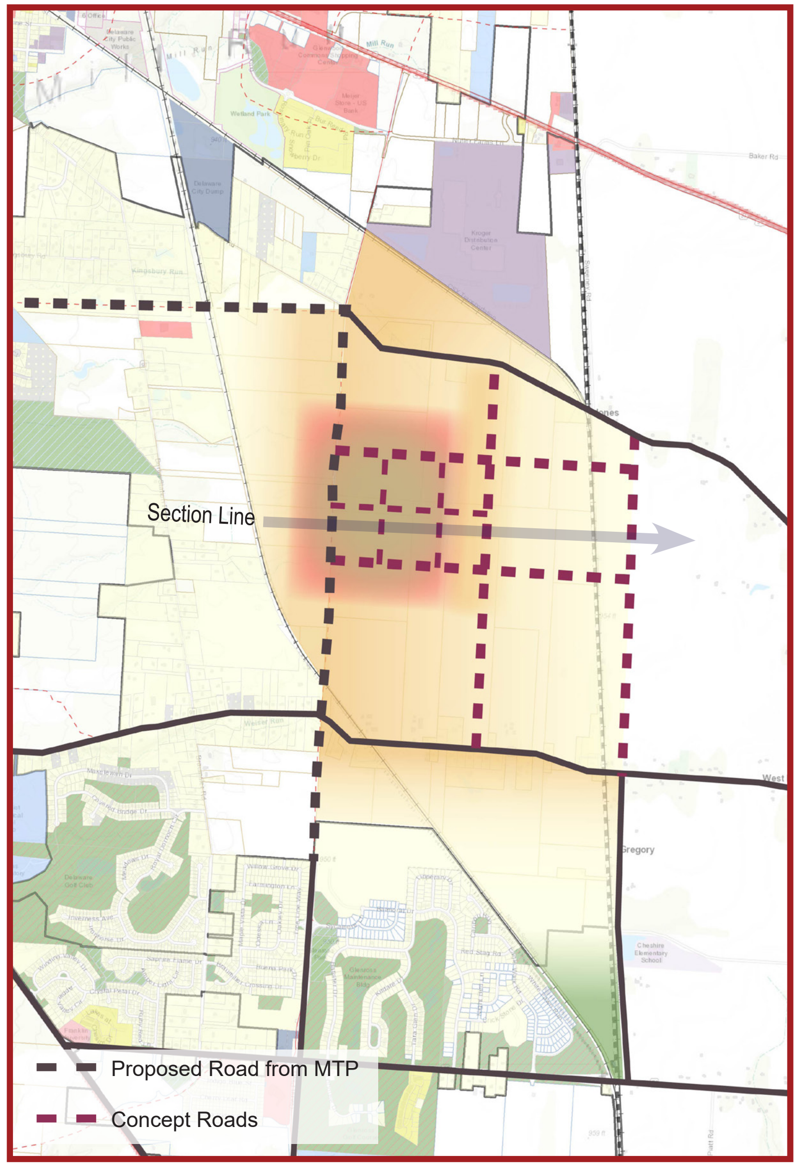
Section Line

Concept Alternative 1.C.2.

Details and Examples

Delaware Together

Building on Tradition, Planning for Tomorrow

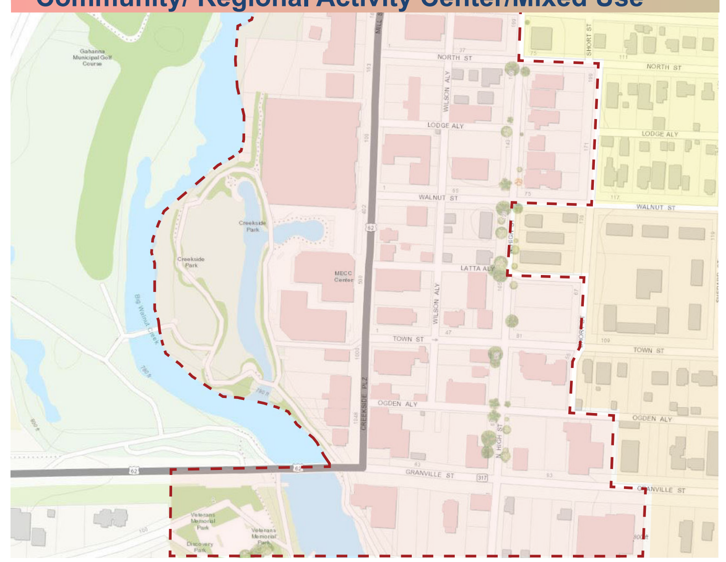


SUBURBAN VILLAGE

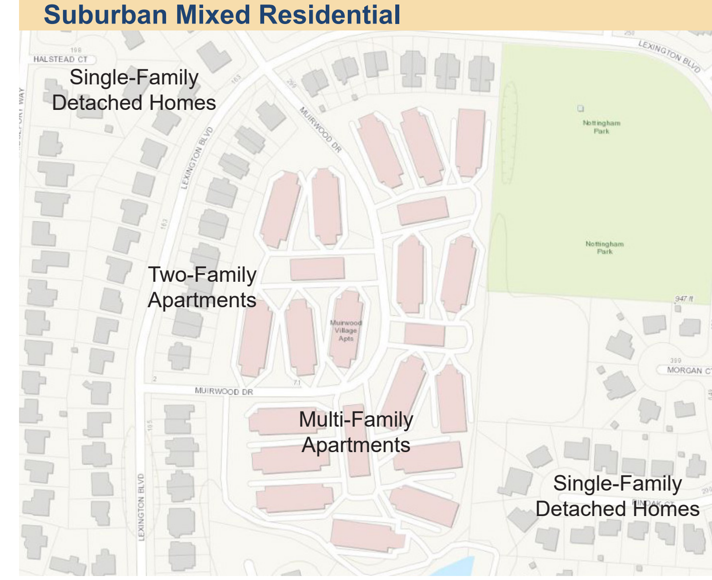
A village concept seeks to establish a complete single nodal village in a pattern similar to how Delaware historically developed, as a denser core with smaller blocks with neighborhoods that get slightly less intense in use further from the center. A gridded street network ensures all roads serve the same role. Alleyways are encouraged. This option uses a more suburban character with curvilinear streets and more separation of uses. Maximum building heights of 3 stories would be preferred.

AERIAL OF DEVELOPMENT TYPES

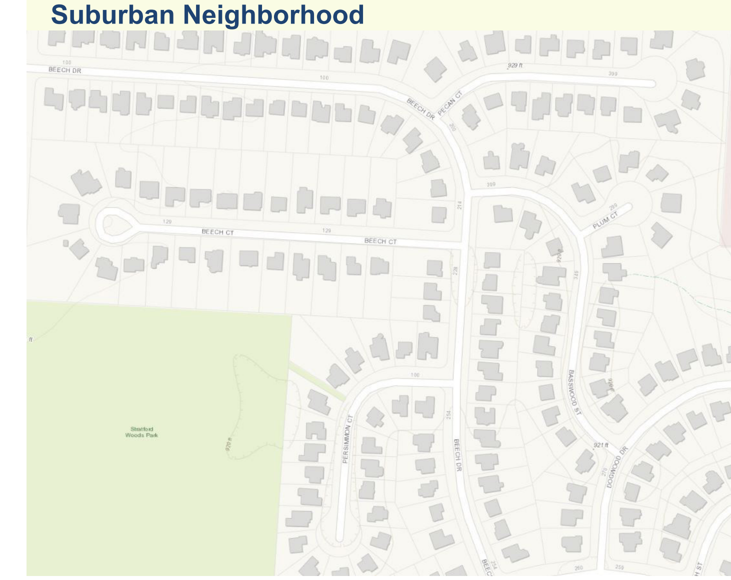
Community/ Regional Activity Center/Mixed Use



Suburban Mixed Residential



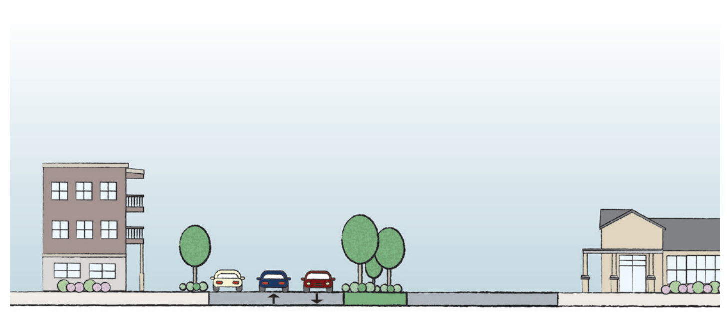
Suburban Neighborhood



SECTION EXAMPLES

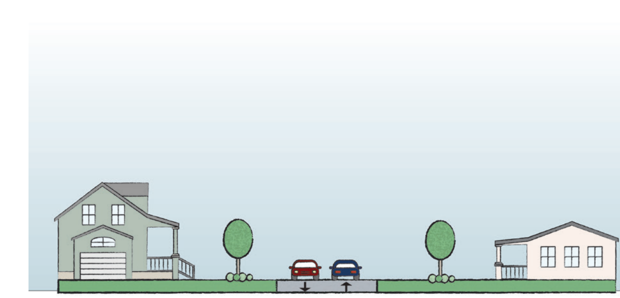
Suburban Mixed Residential

Community/ Regional Activity Center/ Mixed Use



Suburban Mixed Residential

Suburban Neighborhood



Section Line

Special Area 2

South Western District

DelawareTogether

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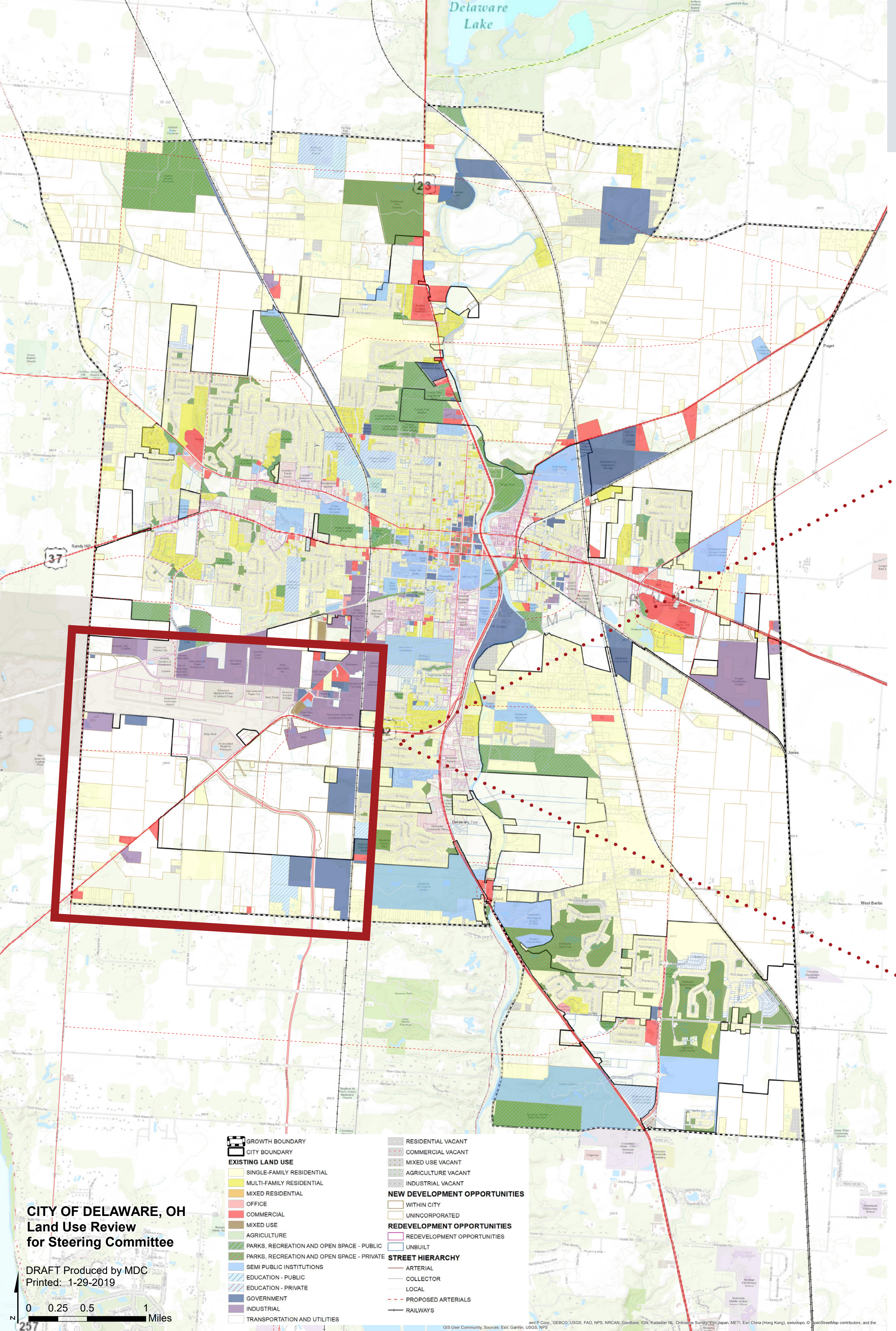
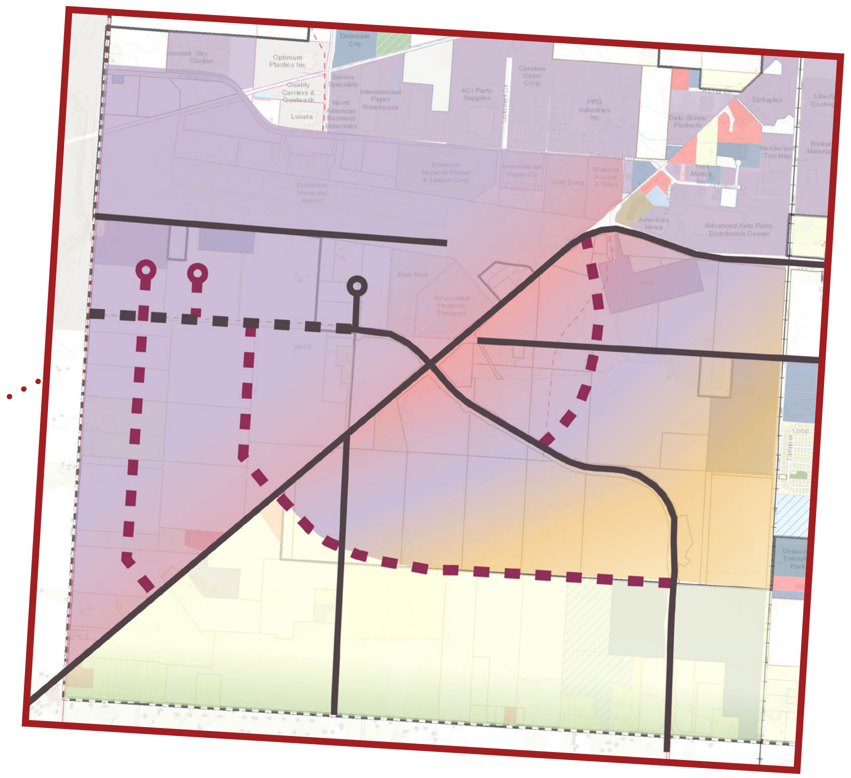
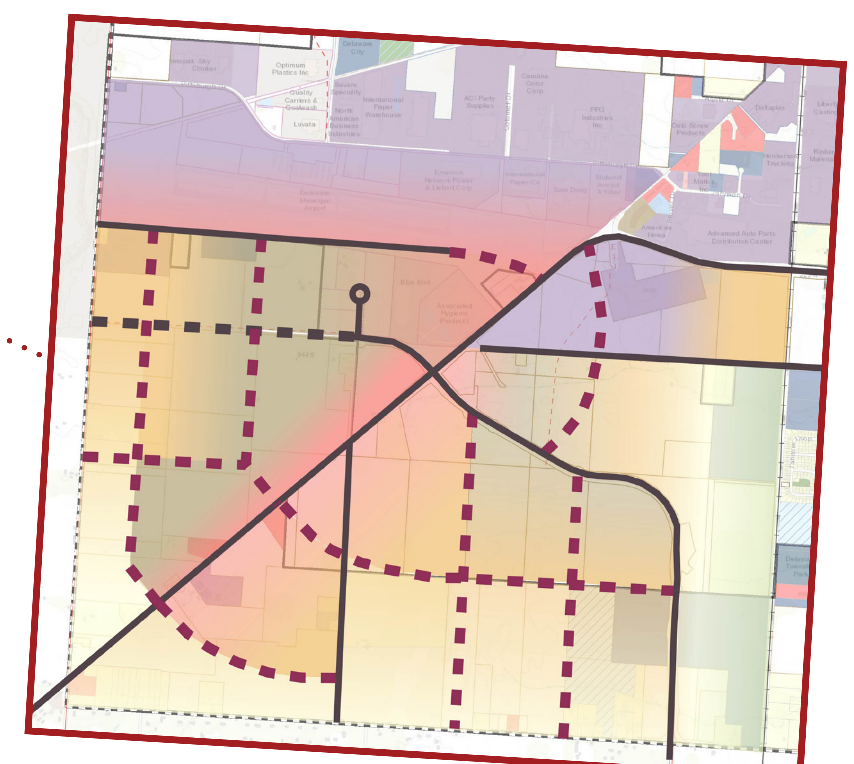




CONCEPT ALTERNATIVE 2.A.

CONTEMPORARY INDUSTRIAL/COMMERCE PARK

Contemporary Industrial/Commerce Parks are composed of large lots designed to accommodate a large footprint, single building or use with typically no internal road network and where the entrance to the use is accessed from the primary road. While traditionally these uses have included manufacturing, warehousing and distribution, increasingly uses are shifting toward R&D, tech-oriented industry and other "boutique" industrial uses.



CONCEPT ALTERNATIVE 2.B.

MIXED USE EMPLOYMENT DISTRICT

Mixed Employment Districts will have a large lot subdivision style of development or mixture of lot sizes with infrastructure and lot sizes designed to accommodate flex buildings, some with larger footprints (similar to an Industrial Campus but with more variety in uses), and incorporate workforce housing in close proximity. This type of pattern could develop at a variety of densities. Two concept alternatives have been created to illustrate the different types of densities that could potentially develop in this area. The two characters are illustrated using the same general land use plan as 2.B.1: Regional Mixed Use Employment District, and 2.B.2: Traditional Mixed Use Employment District.

Concept Alternative 2.A.

Details and Examples

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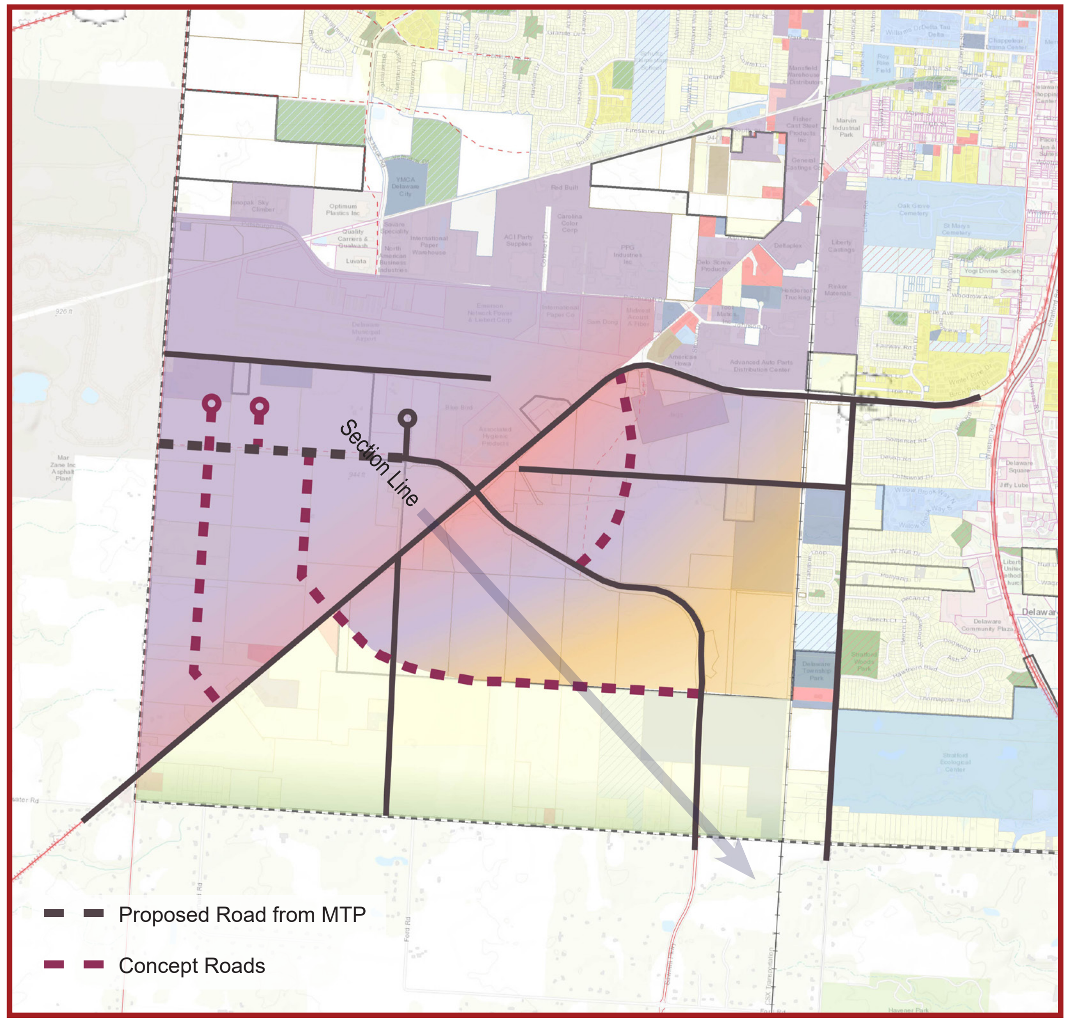


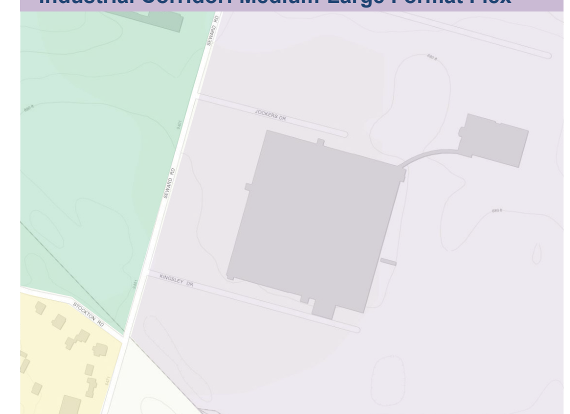
CONTEMPORARY INDUSTRIAL PARK

Contemporary Industrial Parks include large buildings designed to accommodate manufacturing or distribution and offices. An Industrial Park in Delaware could include large lot sizes designed to accommodate flex buildings with large footprints in excess of 100,000 square feet, as well as incorporate workforce housing in close proximity to the industrial park. Road designs would allow for easy access and weight of freight and heavy truck traffic.

AERIAL OF DEVELOPMENT TYPES

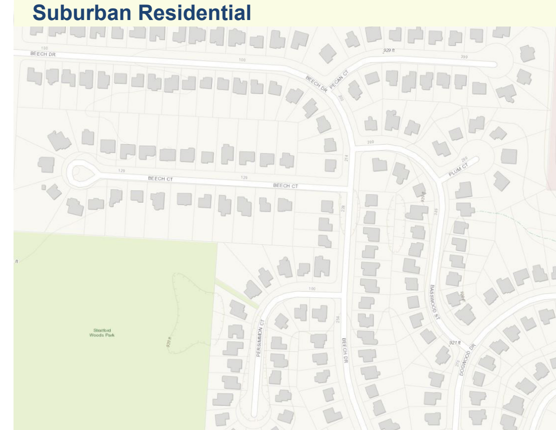
Commercial Corridor or Community Activity Center

Industrial Corridor: Medium-Large Format Flex

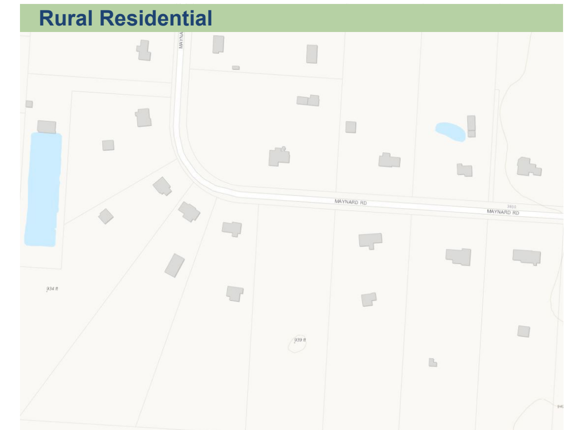


Suburban Mixed Residential

Suburban Residential



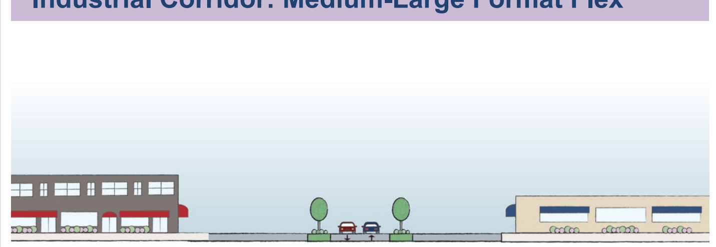
Rural Residential



SECTION EXAMPLES

Commercial Corridor or Community Activity Center

Industrial Corridor: Medium-Large Format Flex



Suburban Mixed Residential

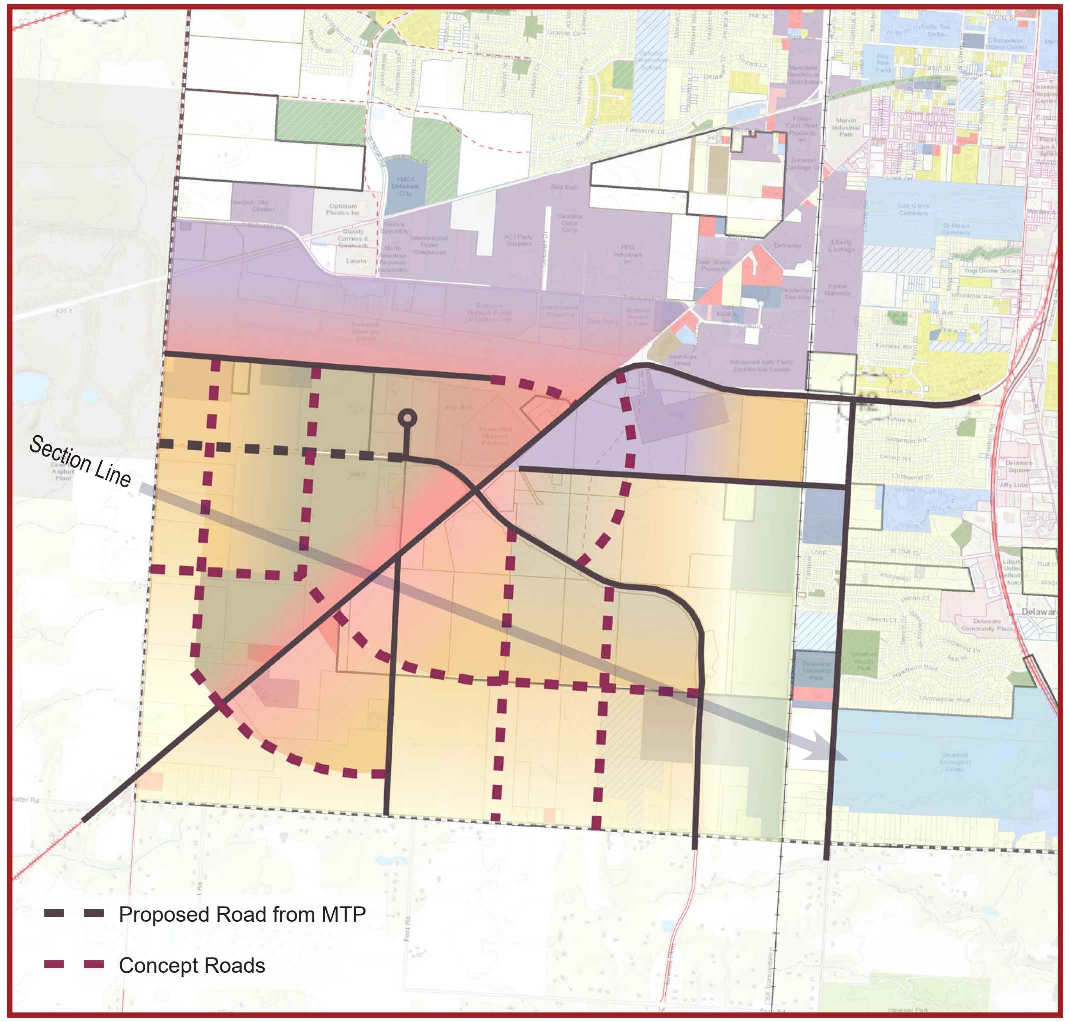
Suburban Neighborhood

Rural Residential

Section Line

Concept Alternative 2.B.1.

Details and Examples



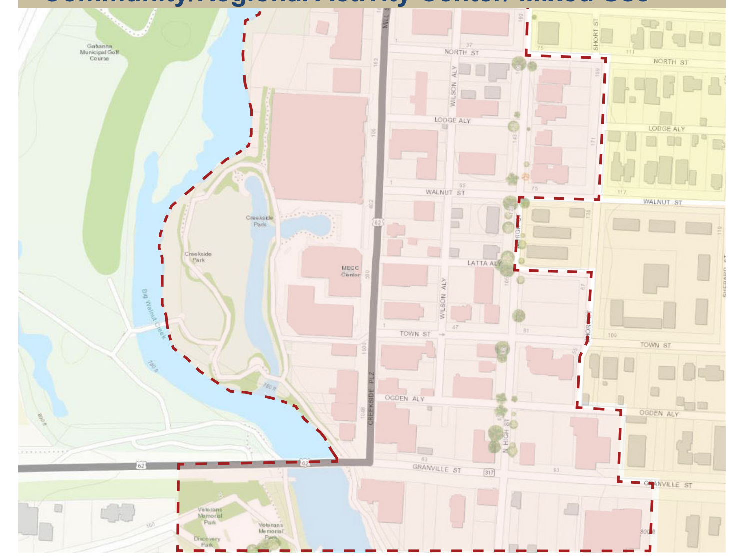
REGIONAL MIXED USE EMPLOYMENT DISTRICT

Mixed Employment Districts consist of office and related uses that are planned as a unified development, or at least unified to regulate a specific plan. Mixed Employment Districts should be planned to incorporate consistent standards of development quality. Specifically in Delaware, a Mixed Employment District would incorporate industrial, (large scale) office, a variety of mixed use office-commercial, and workforce housing in close proximity.

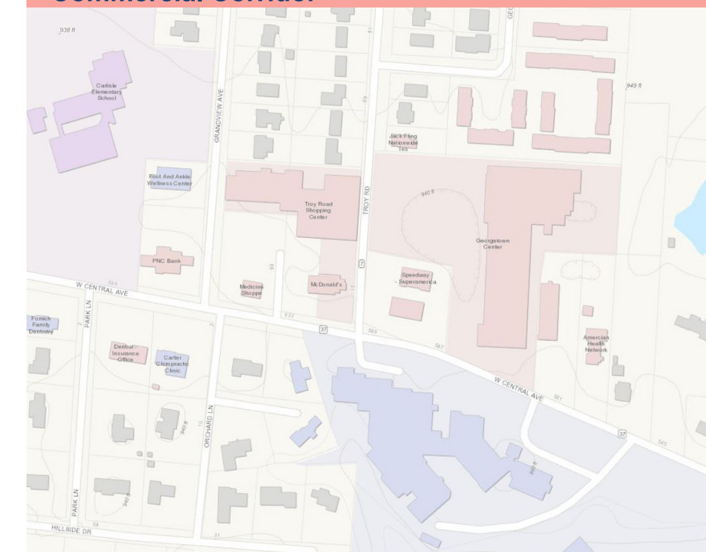
Specifically, a Regional Mixed Use Employment District would develop at a more suburban scale with larger lot sizes and building footprints.

AERIAL OF DEVELOPMENT TYPES

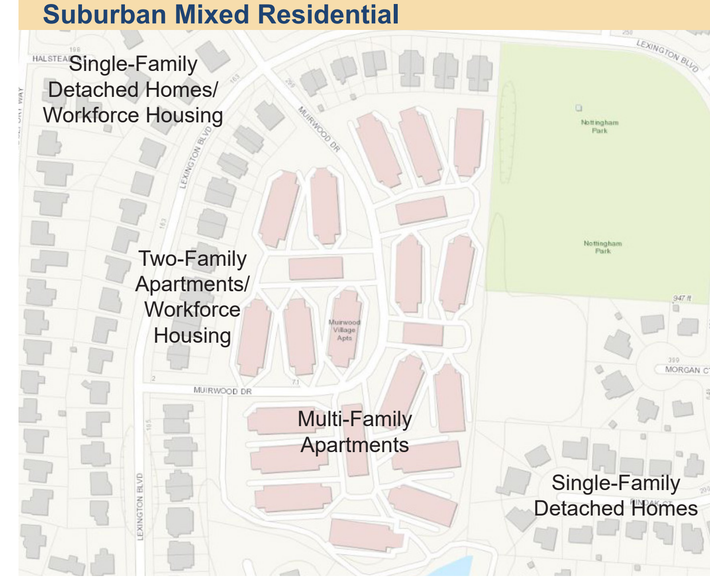
Community/Regional Activity Center/ Mixed Use



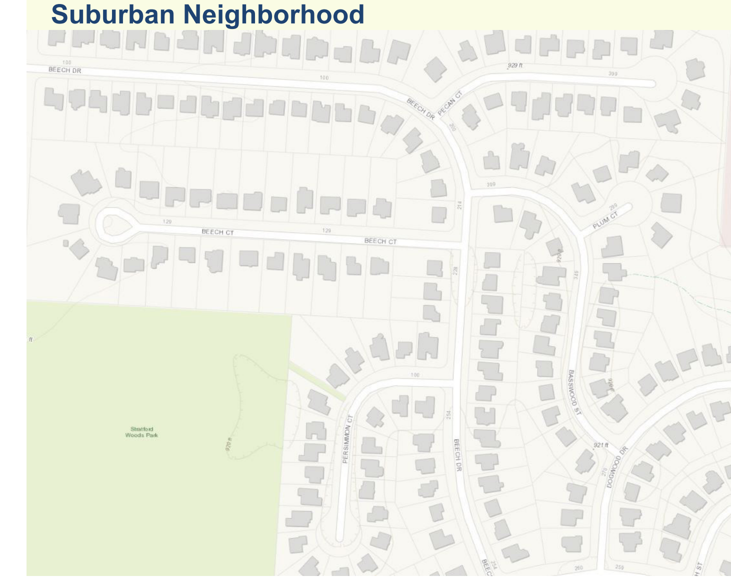
Commercial Corridor



Suburban Mixed Residential

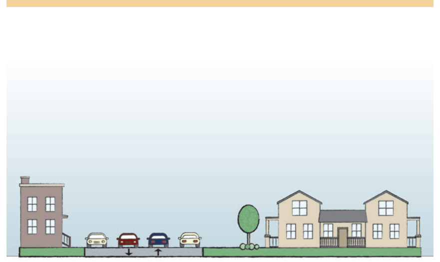


Suburban Neighborhood



SECTION EXAMPLES

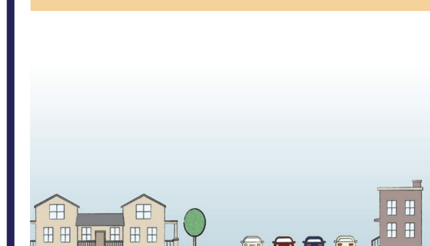
Suburban Mixed Residential



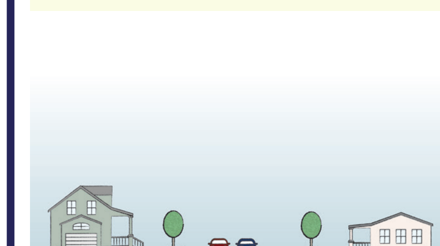
Community/ Regional Activity Center/ Mixed Use

Commercial Corridor

Suburban Mixed Residential



Suburban Neighborhood



Section Line

Concept Alternative 2.B.2.

Details and Examples

Delaware Together

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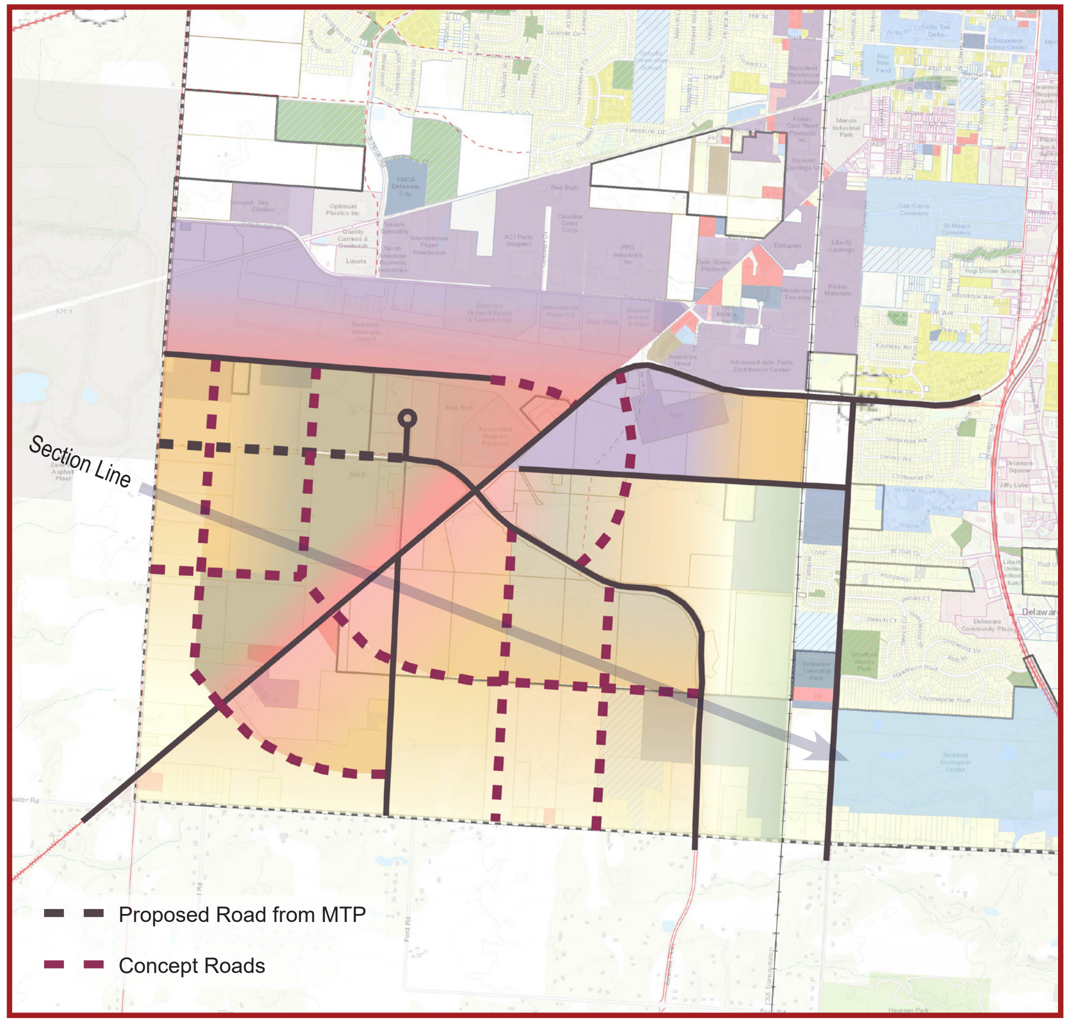


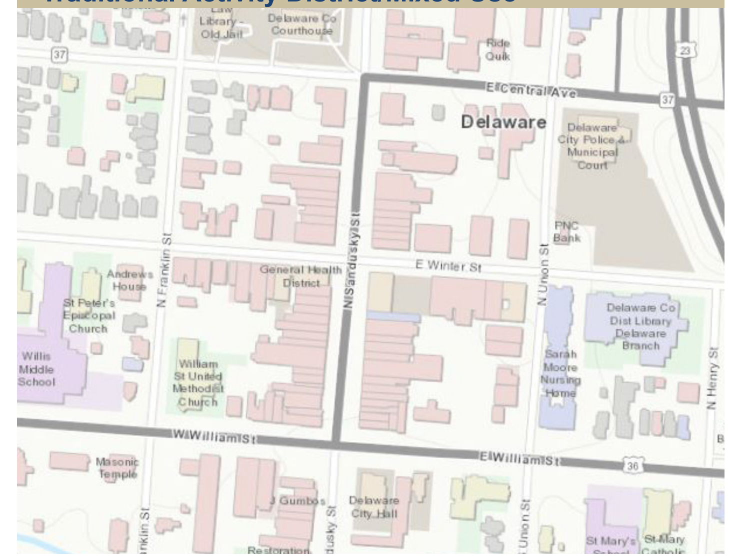
TRADITIONAL MIXED USE EMPLOYMENT DISTRICT

Mixed Employment Districts consist of office and related uses that are planned as a unified development, or at least unified to regulate a specific plan. Mixed Employment Districts should be planned to incorporate consistent standards of development quality. Specifically in Delaware, a Mixed Employment District would incorporate industrial, (large scale) office, a variety of mixed use office-commercial, and workforce housing in close proximity.

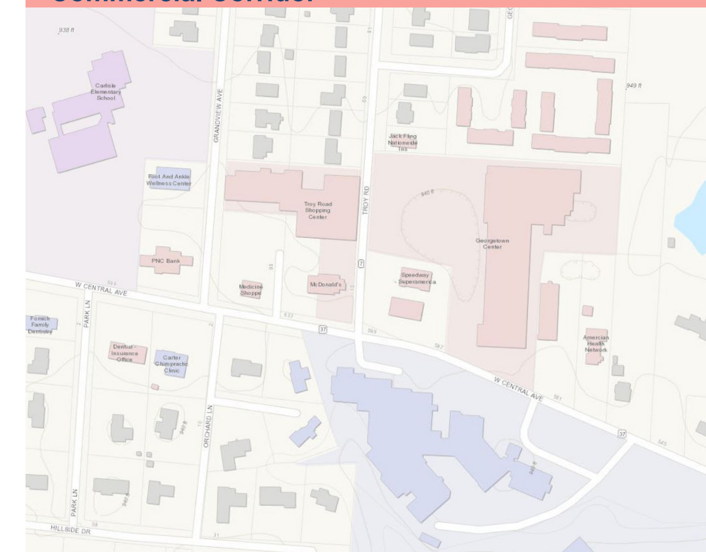
Specifically, a Traditional Mixed Use Employment District would develop at a more urban scale with smaller lot sizes and building footprints that resemble character you may find in a downtown district or traditional mixed use activity center.

AERIAL OF DEVELOPMENT TYPES

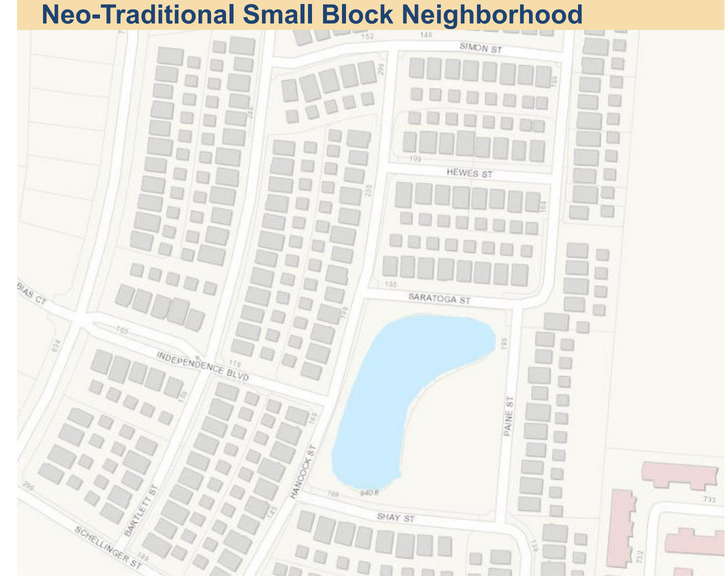
Traditional Activity District/Mixed Use



Commercial Corridor



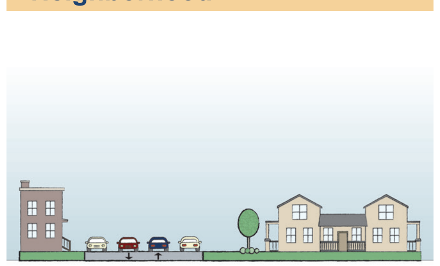
Neo-Traditional Small Block Neighborhood



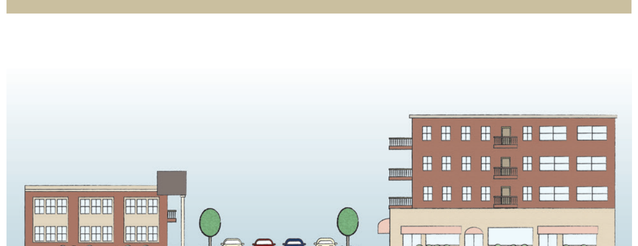
Traditional Large Block Neighborhood

SECTION EXAMPLES

Neo-Traditional Small Block Neighborhood

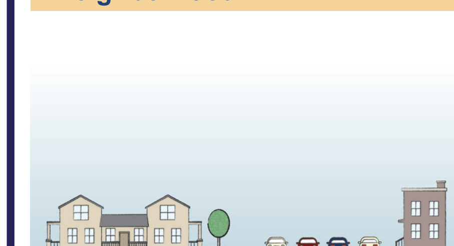


Traditional Activity District/ Mixed Use

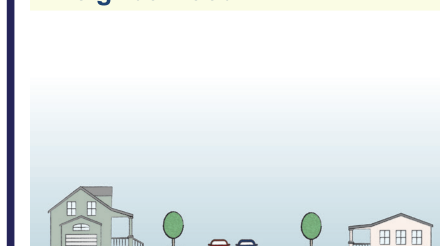


Commercial Corridor

Neo-Traditional Small Block Neighborhood



Traditional Large Block Neighborhood



Section Line

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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"*

Delaware Together workshop participant

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.