



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

May 2013

A Message from the Planning Director:

I am pleased to present this year's Development Monitoring System report (DMS). The DMS report has been issued each year since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. As with last year's report we have included some additional information required per the recent amendments to State law, known collectively as the Smart, Green and Growing legislation. Most of the reporting requirements in the Smart, Green and Growing legislation had already been included in our DMS reports. However, there are some additional smart growth measures and indicators now included such as descriptions of zoning map and text amendments, subdivision regulation amendments, new General Plan elements and amendments, residential density and new infrastructure. The section of this report beginning on Page 7 includes this additional information.

This DMS report summarizes all development activity in the County from initial subdivision sketch plan to final use & occupancy permit. Both residential and nonresidential development are evaluated with comparisons to previous years' development activity going back five years. In 2012 there were 1,220 housing units built in the County. Of these, 41% were single family detached homes, 34% were townhouses and 25% were condo or rental apartments. This is a 25% reduction from the 2011 total of 1,647 new homes completed, an indication of the still struggling housing market. However, building starts were up 42% this reporting period compared to the last with 1,662 permits issued in 2012 compared to 1,172 issued in 2011, an indication that demand for new housing is on the rise. As of December 2012, there were an additional 2,019 residential units in the site development plan process. Once these site plans are approved building permits for these units can then be issued.

Building permits were issued for 1.1 million square feet of non-residential space in 2012. This is a 38% increase over the 778,000 square feet issued in 2011, which had been the smallest amount ever reported since the DMS was established in 1992. The amount of square feet in approved site development plans also increased significantly last year, from 434,000 in 2011 to 795,000 in 2012. There is another 1.1 million square feet of commercial space in the site development plan process awaiting final approval. These trends in increased construction and planning activity point to an improving outlook in the non-residential sector.

Sincerely,



Marsha S. McLaughlin,
Department of Planning and Zoning

Development Monitoring System Report

Date Issued:

May 2013

Reporting Period:

January 1, 2012 to December 31, 2012
With countywide summaries from 2007

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Executive Summary

Adequate Public Facilities Act

The Adequate Public Facilities Act of 1992 addresses “the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist.”

Adoption of the Adequate Public Facilities Act (commonly known as APFO) in 1992 has allowed the County to effectively manage the amount and distribution of residential growth in accordance with growth policy set by the General Plan. Prior to adoption of APFO, the County was averaging more than 3,000 new houses per year. This rate has been reduced by about half since the adoption of the 2000 General Plan, which established the annual number of housing unit allocations for new homes that can move through the development process. Howard County’s latest general plan, PlanHoward 2030 was recently adopted in July, 2012. This new plan maintains the same pace of overall housing unit growth but under a new geographic distribution aligned with Designated Place Types in addition to Planning Areas (See PlanHoward 2030 Map 6-2 on Page 6 of this report.) This new allocation distribution was not effective until March 14, 2013 given that the APFO legislation had to be amended and adopted following the adoption of PlanHoward 2030.

Also part of APFO are the Open/Closed Schools test, which limits construction in areas of the County facing school overcrowding, and the adequate roads test which determines necessary road improvements. In addition, excise taxes on new construction fund road and school capacity needs to keep pace with new growth.

Currently, there are 4 plans with 12 housing units being delayed due to the APFO allocations test in the Established Communities allocation area. The Open/Closed schools test occurs after allocations are received. Currently, there are 5 elementary school and 2 middle school districts closed to development. Thus far into the current fiscal year, 5 projects with 133 units are on hold due to closed schools.

APFO has been effective in phasing growth, either through “forced phasing” due to restricted numbers of allocations allowed each year or developer planned phasing prompted in part by APFO allocation limits. Known phasing of subdivisions helps the County plan for future infrastructure needs, and growth controls help the County provide for the timely construction of schools, roads and other public infrastructure.

Development Monitoring System Report (DMS)

This is the 21st annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County’s land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits. Both approved and currently in-process plans are tabulated. Current year as well as a five year history are discussed. The report is divided into Residential and Non-Residential sections. Map 6-2 from PlanHoward 2030 on Page 6 shows the five Planning Areas that are used in the analysis.

For the first time development activity in Downtown Columbia is included in this year’s report. Several projects there were in planning stages in 2012. Construction is to follow shortly beginning in 2013.

Additional Reporting Requirements and Timeframe

Amendments to State law enacted in 2009, known collectively as the Smart, Green and Growing legislation, requires that local jurisdictions report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions. These reports are due in July covering development activity for the previous calendar year.

DPZ has issued an annual Development Monitoring System (DMS) report since 1992 when the County’s Adequate Public Facilities Ordinance was first adopted. This report had covered development activity from October 1 through September 30 each year. Since the new reporting requirement from the State stipulates that the period covered is to be January through

December, the DMS has been adjusted to report on a calendar year. This is the third DMS report that incorporates this time adjustment and covers calendar year 2012.

Most of the reporting requirements outlined in the Smart, Green and Growing legislation were already covered in the DMS report. There are some additional items, however, that are new. Thus a new section has been added beginning on Page 7. The additional information includes smart growth measures and indicators, planning-related regulatory amendments, and new General Plan elements and amendments. Newly built infrastructure is also reported on. This is followed by a discussion on whether these changes are consistent with Howard County’s General Plan and other policies.

Another key reporting requirement is an analysis of residential development density that occurred during the last calendar year both inside and outside the county’s priority funding area (PFA). Related to this is a discussion on Howard County’s growth goals, and how recent development and planning activity is consistency with these goals.

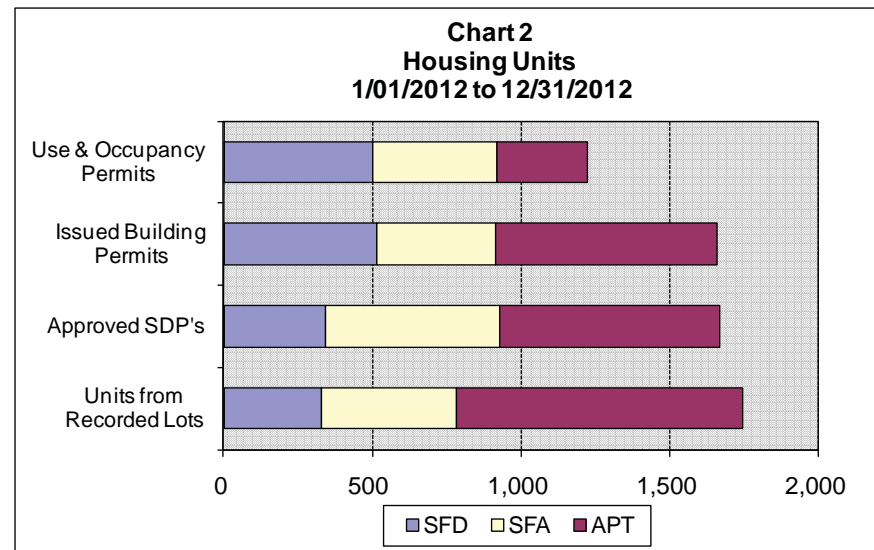
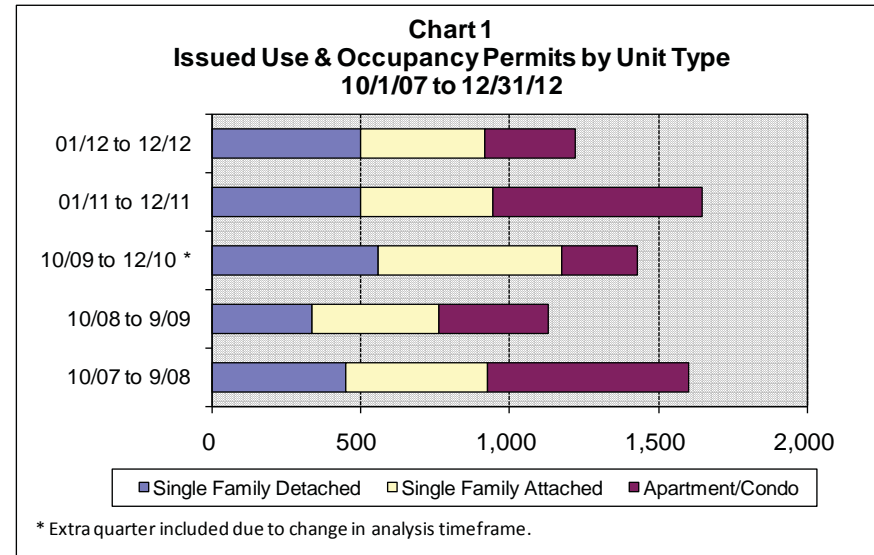
The reporting of these additional items not only meet the State planning requirements, but given that they will be integrated into DPZ’s existing reporting process and structure, further context will be created – a context that will enable a better understanding of land development issues, policies and goals.

Residential Development

Total Housing Activity

- Over the last five years, there has been an annual average of 1,339 new housing units built in the County. About one-third of these have been single family detached, one-third single family attached or townhouse units, and one-third apartment units (including both rental and condo). (Chart 1)
- During the latest reporting period, from January through December 2012, 1,220 housing units were built. This is a decrease from the previous reporting period when 1,647 units were built, which was greatest number built over each of the last five years. (Chart 1)
- Of the 1,220 completed units last year, 41% were for single family detached, 34% for townhouse and 25% for apartment units (condo or rental). Greater percentages of townhouse and apartment units are likely to persist given the zoning of the undeveloped land in the County as well as redevelopment initiatives.
- Last year, about 33% of all units were built in Ellicott City, 27% in the Southeast, 21% in Elkrigde, 13% in the Rural West, and 7% in Columbia. (See map on Page 6 that show these five planning areas.)
- The number of building permits issued (housing starts) during this current reporting period was 1,662. This is significantly more than the 1,172 permits issued during the previous reporting period.
- Over the latest reporting period, there was potential for 1,742 units from recorded lots and 1,667 units approved in site development plans (Chart 2).
- As of December 31, 2012 there were 7,069 units in the subdivision process. This represents all units in plans under review prior to being recorded or approved in a site plan. This compares to 8,018 units in process for the prior reporting period (December 31, 2011).
- A significant number of the in-process units – 5,447 or 77% of the total 7,069 – are included in future phases of phased projects with development planned as far out as 2019. The larger phased plans include Maple Lawn and Laurel Park Station in the Southeast, The Overlook at Blue Stream, Oxford Square and Howard Square in Elkrigde, and Turf Valley and the Courtyards in Ellicott City. Walnut Creek in the Rural West is also phased.

- Countywide, 23% of the units in process on December 31, 2012 were single family detached units. About 22% were single family attached units and another 55% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 211 age-restricted housing units built in 2012, 17% of the total 1,220 units built in the County. These 211 units consisted of 34 single family detached units, 62 townhomes and 115 apartment or condo units. Most all the units were built in Ellicott City.
- As of December 31, 2012 there were 669 age-restricted units in the planning process – 130 single family detached units, 190 townhouse units and 349 apartment or condo units. About 83% these are in Ellicott City, 14% in the Southeast and the remaining 3% in Columbia. For the previous reporting period there were 689 age-restricted units in process, 20 more than the current year.

Moderate Income Housing Units

- During 2012 there were 79 MIHU units in approved plans - 64 townhouse units and 15 apartment or condo units. This is more than the 51 approved MIHU units the previous reporting period.
- As of December 31, 2012 there were 784 MIHU units in process – 81 townhomes and 703 apartment or condo units. About 72% of the units were in Elkridge, 20% in the Southeast, and 8% in Ellicott City. By comparison, there were 881 MIHU units in process the previous reporting period.
- Of the 784 MIHU units in process, 58 are age-restricted. This is about 7% of all MIHU units in process and includes 42 apartment or condo units and 16 townhomes.

Rural Land Preservation

- For the current reporting period, 127 acres of environmentally sensitive land were permanently preserved in the Rural West. This includes 127 acres preserved as a result of subdivision activity using the cluster subdivision zoning regulations and Density/Cluster Exchange Options (DEO/CEO). No agricultural land was preserved last year.
- Preservation easements in the Rural West have been steadily increasing and now total 29,465 acres. This includes 21,590 acres of agricultural preservation easements and 7,875 acres of environmental preservation parcels dedicated through the subdivision process. This totals 31% of the land in the Rural West. Including park land, WSSC land and other environmental easements, 44% of the Rural West is now permanently preserved.

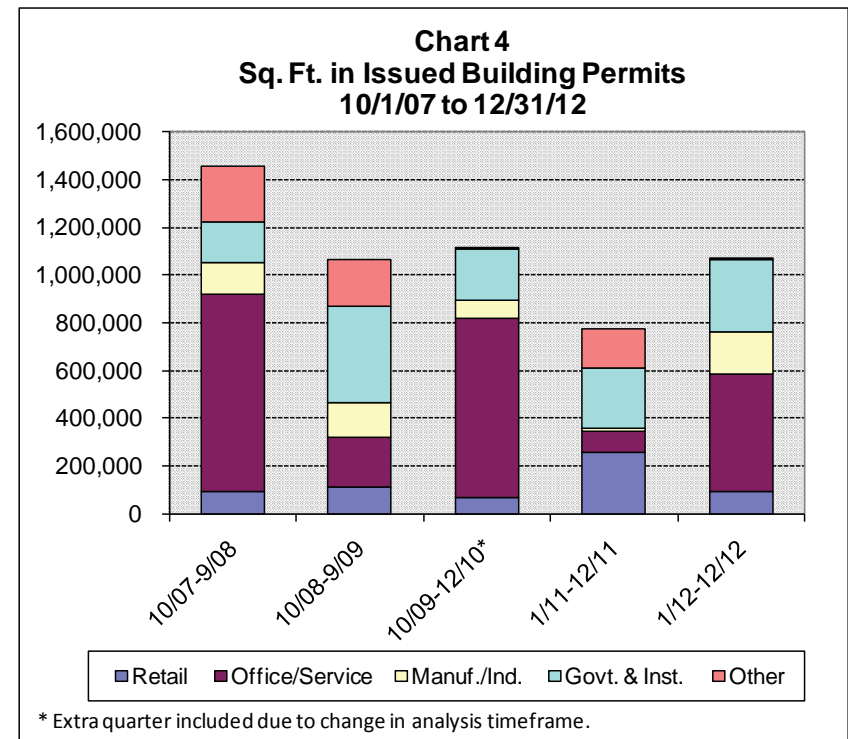
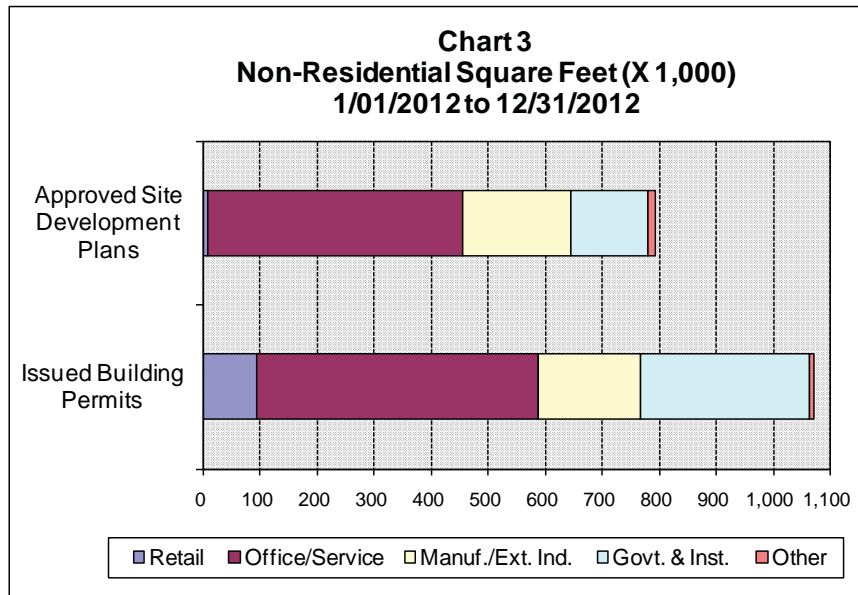
Housing Sales

- Home sales prices in Howard County remained flat last year. The median sales price for all housing types combined stayed the same at \$380,000. The mean sales price decreased very slightly by 1.0%, from \$416,000 to \$412,000.
- Whereas single family detached and attached median home prices decreased last year by 2.6% and 0.1% respectively, condos units, however, increased for the first time since their peak in 2005/06, rising a modest 2.9%.
- For the latest reporting period, the median sales price for condos was \$202,000. Townhouse units sold on average for \$307,565. The median single family detached home in the county sold for \$472,500.
- Mean sales prices last year were \$198,496 for condo units, \$322,141 for single family attached units and \$506,075 for single family detached units.

Non-Residential Development

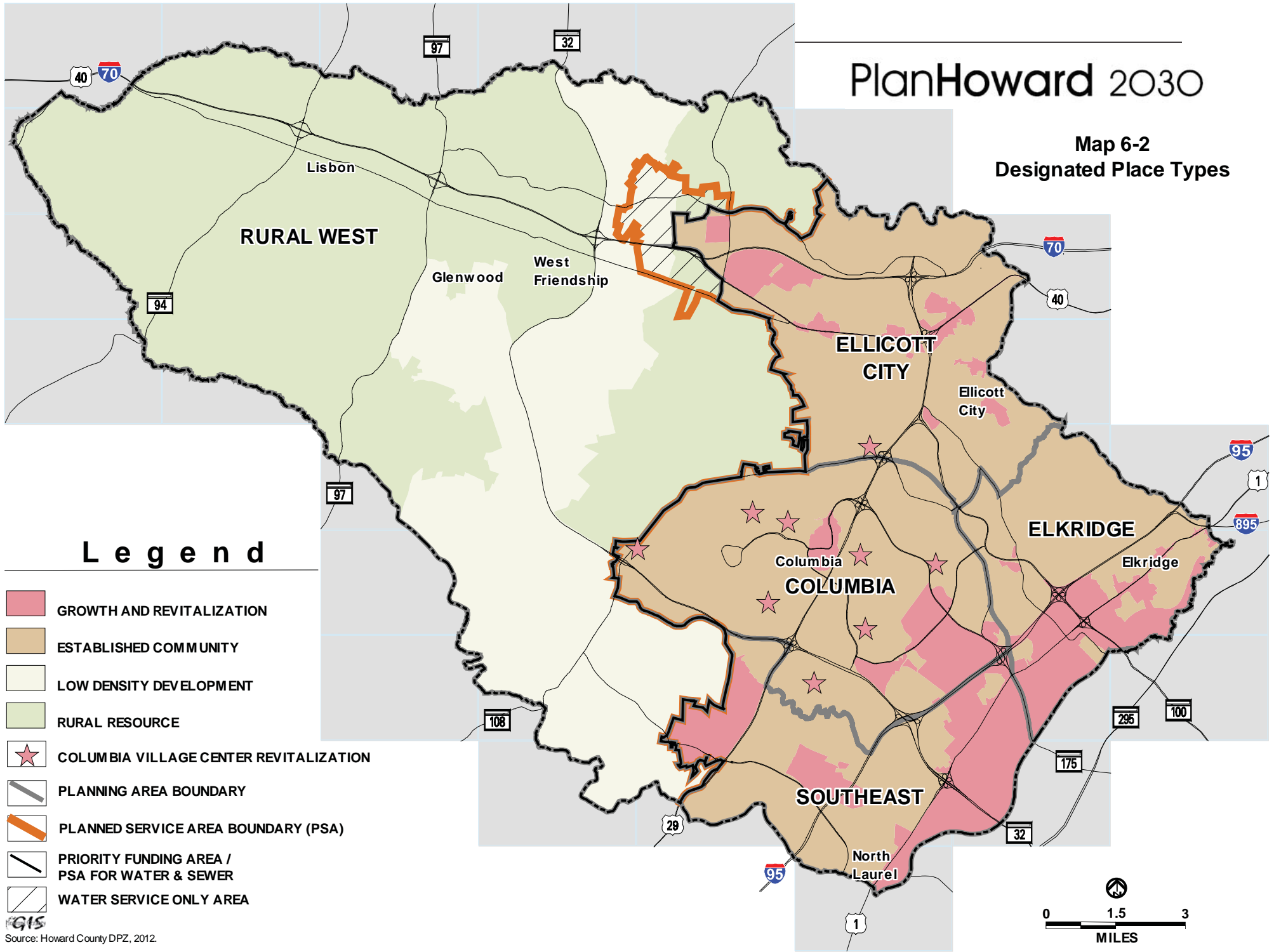
- From January through December 2012, 794,000 square feet of building space were approved in site development plans. Building permits were issued for almost 1.1 million square feet. (Chart 3).
- As shown in Chart 4 there was an increase in the square footage of issued building permits last year, from 778,000 square feet issued in 2011 to 1.1 million square feet issued in 2012. This is the third greatest amount issued over the last 5 years.
- Over the last five years, there was an annual average of 907,000 square feet in approved site development plans and 1.05 million square feet in issued building permits.

- About 39% of the new building space constructed last year is located in Elkridge. About 37% of the total was constructed in the Southeast, 19% in Columbia and 5% in Ellicott City.
- As of December 31, 2012, there were 1.1 million square feet in-process in site development plans. This is close to the same amount in process the previous year.
- According to the State Department of Labor, Licensing and Regulation, the County gained 7,147 jobs last year (1st quarter 2011 to 1st quarter 2012 statistics). This is almost a 5% increase bringing the total jobs in Howard County to 154,504.



PlanHoward 2030

Map 6-2
Designated Place Types



Legend

- GROWTH AND REVITALIZATION
- ESTABLISHED COMMUNITY
- LOW DENSITY DEVELOPMENT
- RURAL RESOURCE
- ★ COLUMBIA VILLAGE CENTER REVITALIZATION
- PLANNING AREA BOUNDARY
- PLANNED SERVICE AREA BOUNDARY (PSA)
- PRIORITY FUNDING AREA / PSA FOR WATER & SEWER
- WATER SERVICE ONLY AREA

GIS
Source: Howard County DPZ, 2012.

Smart Growth Information

Smart, Green and Growing Legislation

This section of the DMS report has been produced to satisfy amendments to State law enacted in 2009, known collectively as the Smart, Green and Growing legislation. All jurisdictions in Maryland are required to report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions. (Note that reporting on APFO restrictions are required every other year. Reporting on this will be in next year's DMS report.) These reports are due in July covering development activity for the previous calendar year.

This DMS report, issued annually by DPZ as required by the county's 1992 APFO law, already includes most of what is required per the State law and these items continue to be covered in the subsequent sections of this report. There are some additional items, however, that were not included. The purpose of this section is to cover these additional items.

This section summarizes planning-related regulatory activity including zoning map and text amendments, subdivision and land development regulation amendments, and new General Plan elements and amendments. Newly built infrastructure is also reported on, including new roads and other major transportation facilities, major water and sewer facilities, and new schools and school additions. A discussion on whether these changes are consistent with Howard County's General Plan follows.

Another key reporting requirement is residential development density that occurred during the last calendar year both inside and outside the county's Priority Funding Area (PFA). Related to this is a discussion on Howard County's growth goals and how recent development and planning activity is consistent with these goals.

Regulatory Activity

General Plan Amendments and New Elements (and related)

CB-26-2012 – PlanHoward 2030

Howard County's General Plan, known as PlanHoward 2030, was adopted in July, 2012. This new plan supersedes the 2000 General Plan that had been adopted more than 10 years ago. PlanHoward 2030 now serves as the general plan for Howard County covering multiyear development planning for land use, transportation, public facilities, water, sewerage, parkland, housing, human services and environmental protection. The land use element includes smart growth policies, designated places and growth tiers.

CB-24-2012 – Downtown Columbia Partnership

The Downtown Columbia Plan, an element of the General Plan, was adopted in 2010. This plan called for the establishment of a Downtown Columbia Partnership. CB-24, adopted in July 2012, created this partnership establishing the Downtown Columbia Management District, setting forth the composition and terms of the Partnership's Board of Directors and establishing the powers and duties of the Board. The bill also provides that the Partnership serve as the Downtown Columbia Housing Foundation and that certain funds shall be used to make affordable housing more available.

CR-112-2012 – Ellicott City Sustainable Community

A resolution seeking designation of Ellicott City as a Sustainable Community for approval by either the Department of Housing and Community Development (DHCD) of the State of Maryland or through the Smart Growth Subcabinet of the State of Maryland. In December 2012 Ellicott City was designated as a Sustainable Community by DHCD. One immediate benefit of this designation is that the County is to receive a \$50,000 grant for facade and other improvements in downtown Ellicott City.

CB-25-2012 – Comprehensive Zoning Process

An act amending the process for comprehensive zoning - defining certain terms, clarifying the County Council authority related to comprehensive

zoning, clarifying the purpose of the zoning districts and zoning regulations, requiring certain notice of a comprehensive zoning plan, requiring certain procedures before the Planning Board and the County Council, allowing for the consideration of certain requests, making certain technical corrections, and generally related to comprehensive zoning in Howard County.

Zoning Regulation Amendments

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County during 2012.

ZRA 137 – Community Swimming Pools

An act amending the Howard County Zoning Regulations to permit Community Swimming Pools to send density under the Neighborhood Preservation Program in the R-ED, R-20, and R-12 zoning districts, under certain conditions; establish a reduced rear setback of 15 feet on R-ED zoned lots that adjoin an open space lot; and generally related to Community Swimming Pools and rear setbacks.

ZRA 138 – Pick Your Own Enterprises

An act removing a requirement that pick-your-own-enterprises located in the RC (Rural Conservation) Zoning District have frontage on and direct access to certain types of roads, and requiring that all necessary permits and licenses be obtained from the Health Department prior to use as a pick-your-own enterprise.

ZRA 136 – MXD Zoning District Amendments

An act amending the Howard County Zoning Regulations to permit the MXD District regulations to reduce the minimum percentage of employment use land area which may be used in MXD-6 developments that provide age-restricted adult housing from 9% to 7%.

ZRA 139 – Downtown Columbia Moderate Income Housing Units

An act amending the Howard County Zoning Regulations to require a financial affordable housing obligation or the provision of moderate income housing units in Downtown Columbia.

ZRA 141 – Neighborhood Preservation Density Exchange Option

An act allowing certain parcels within the R-ED zoning district to both send and receive development density through the Neighborhood Preservation Density Exchange Option, establishing a maximum receiving lot yield, and providing certain regulations for sending parcels that contain a historic structure.

ZRA 140 – TOD Zoning District Amendments

An act amending the TOD District regulations to allow multi-family dwellings as a permitted use subject to certain criteria, amending the commercial use requirements concerning the building-type, and allowing single lane bank drive-through services subject to certain criteria.

ZRA 142 – Commercial Solar Facilities

An act amending the Howard County Zoning Regulations to permit Commercial Solar Facilities as a Conditional Use in the RC and RR zoning district subject to certain criteria; and generally related to the Zoning Regulations.

ZRA 119 – Guest Houses

An act amending the Howard County Zoning Regulations to amend the Conditional Uses Section to establish a new Conditional Use category that allows for guest houses under certain conditions.

CB 25 – Comprehensive Zoning Process

An act amending the process for comprehensive zoning, defining certain terms, clarifying the County Council authority related to comprehensive zoning, clarifying the purpose of zoning districts and zoning regulations, requiring certain notice of a comprehensive zoning plan, and requiring certain procedures before the Planning Board and the County Council.

Zoning Map Amendments

The following highlights all zoning map amendments including the amendment number, name, and description that were approved in Howard County during 2012. Map 1 shows the location of each.

ZB 1094M – Lewal Partnership

To rezone 3.56 acres of land located on the south side of U.S. 40, approximately 900 feet west of Plumtree Drive (9525 Baltimore National

Pike) from the R-20 (Residential: Single) District to B-1 (Business: Local) District.

ZB 1095M – Howard Research and Development Corporation

To increase the overall allowable maximum density in the NT district to 2.3695 dwelling units per gross acre, to increase apartment land uses and decrease employment center uses in NT, and to change the designation of 16.60 acres to Apartment Land Use from Employment Center Land Use for a property located at the southwest corner of the Lark Brown Road intersection with Old Waterloo Road (TM 37, Parcels 382 and F).

ZB 1096M – Wilde Lake Village Center

To allow for 250 apartment dwelling units and 85,000 square feet of commercial redevelopment on 10.21 acres of NT zoned land in the Wilde Lake Village Center in Columbia.

ZB 1097M – Waverly Woods Development Corporation

To rezone 17.63 acres of land located on the west side of Marriottsville Road, and generally to the north and northwest of Barnsley Way (2200 Marriottsville Road) from the PEC (Planned Employment Center) District to PSC (Planned Senior Community) District.

ZB 1099M – Chapel Townhomes, LLC

To rezone 32,549 square feet of land located on the north side of Richards Valley Road approximately 350 feet east of MD 108 (5733 Richards Valley Road) from the B-1 (Business: Local) District to the R-A-15 (Residential: Apartments) District.

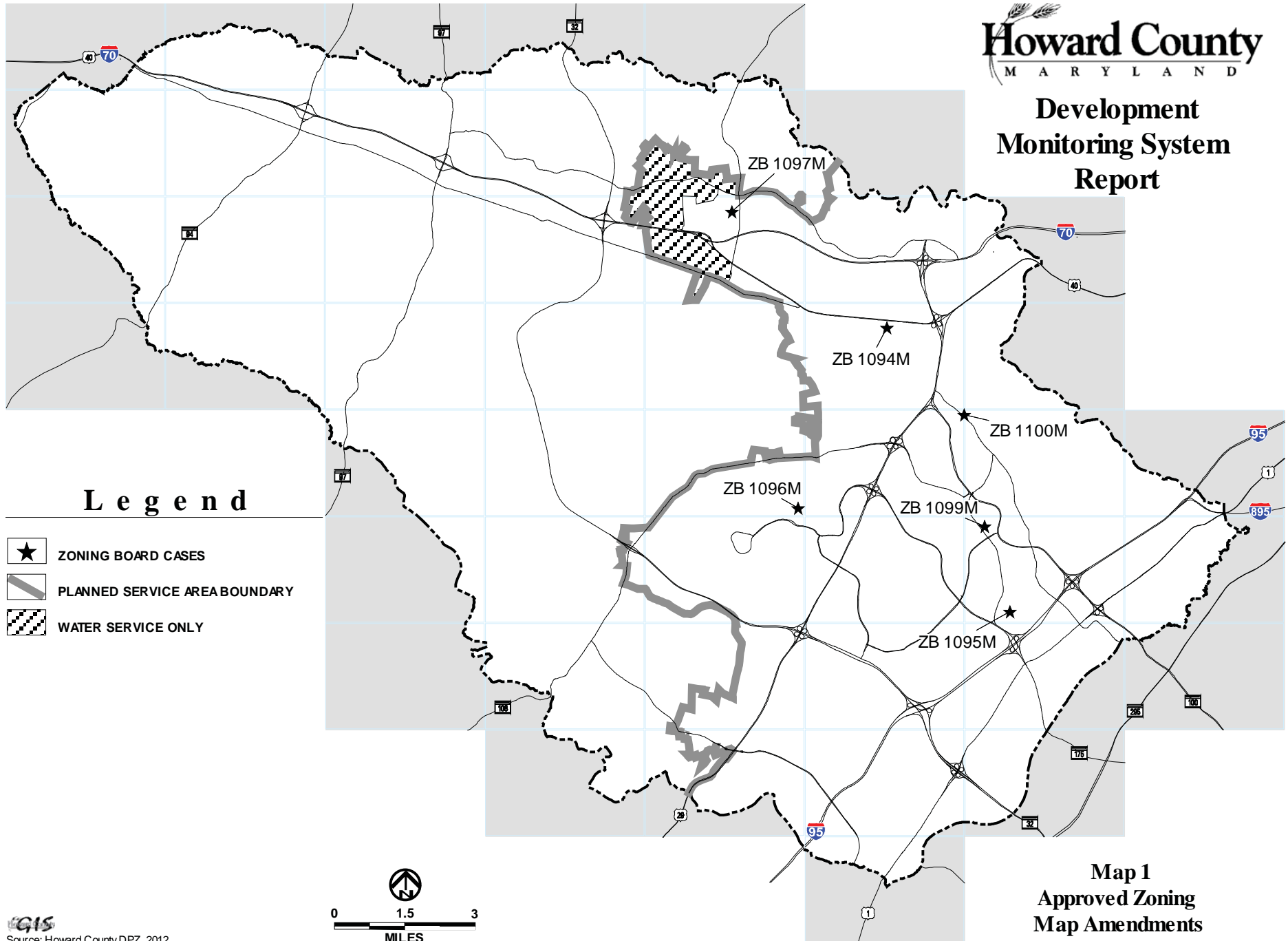
ZB 1100M – Shangri-La Homes, LLC

To rezone 1.89 acres of land located on the northeast side of Montgomery Road approximately 1,500 feet southeast of Long Gate Parkway from R-20 to R-SI (Residential: Senior-Institutional).

Subdivision & Land Development Regulation Amendments

There were no amendments to the Howard County Subdivision and Land Development Regulations adopted in 2012.

**Development
Monitoring System
Report**



Major Infrastructure

New Roads and Substantial Changes in Roads

In 2012, 6.38 miles of new or extended roadway were constructed in Howard County. All of these additions were built in 22 new subdivisions as part of developer's agreements executed with the County. A total of 0.30 miles of roadway was abandoned in 2012, Mount Ida Drive per Council Resolution 25-2011. There were no roads built through the County's capital project process. Detailed information about all roadway construction projects is documented in Howard County's 2012 annual report to the State Highway Administration. These roads are shown on Map 2.

Other Transportation Facilities

Howard County continued its pro-active efforts to replace buses, install new shelters, improve pedestrian access to bus stops and develop a central maintenance facility. Three new fixed route low-floor heavy duty hybrid buses were placed into service and four more new fixed-route low-floor heavy duty hybrid buses have been ordered, three that will be used on the Connect-a-Ride routes which operate in Howard County and serve the new North Laurel Park Community Center. Twelve bus shelters were rehabbed or replaced.

The Central Maryland Transit Operations Facility project continues to move forward. Instead of rehabbing the existing building, a new LEED certified building will be constructed. Preliminary drawings have been completed. The facility is scheduled to open in June, 2014.

New Schools, School Renovations and Additions to Schools

The Howard County Public School system completed two systemic renovation and/or addition projects in the 2012 calendar year. While this is much less than in previous years, please note that a number of other projects are well underway for completion in 2013. The significant majority of the Howard County Public School System's renovation and expansion efforts continues to be within the Priority Funding Area.

Elkridge Elementary School

The Heating Ventilation and Air Conditioning System (HVAC) of Elkridge ES needed to be replaced. The new system meets current HVAC standards and more efficiently serves the building as it was renovated.

Thunder Hill Elementary School

This 9,920 sq. ft. addition to Thunder Hill ES has increased the capacity of the school from 368 to 468 seats. In addition to classroom capacity, core areas were expanded to improve the function of the school with a larger enrollment. Mechanical systems were replaced, making the facility more energy efficient.

Other Community Facilities and Infrastructure

The \$92 million enhanced nutrient removal expansion and improvement project at the Little Patuxent Wastewater Reclamation Plant was completed in 2012. This major upgrade reduces the amount of nitrogen and phosphorous in the plants effluent resulting in better Chesapeake Bay health. Another project that was completed in 2012 is the \$1.2 million expansion of the Scaggsville Fire Station.

Other more minor facility and infrastructure improvements completed in 2012 include: 1) grading and sediment work to replace existing water mains, 2) interior modifications to the Howard County Office of Tourism, 3) construction of a picnic shelter at the Western Regional Park, 4) construction of restroom pavilions at the North Laurel Community park, 5) site improvements at Blandair Park, 6) stream restoration at Meadowbrook Park, 7) a new solar array in the old Newcut Landfill, and 8) other stream restoration and sewer interceptor projects.

Consistency

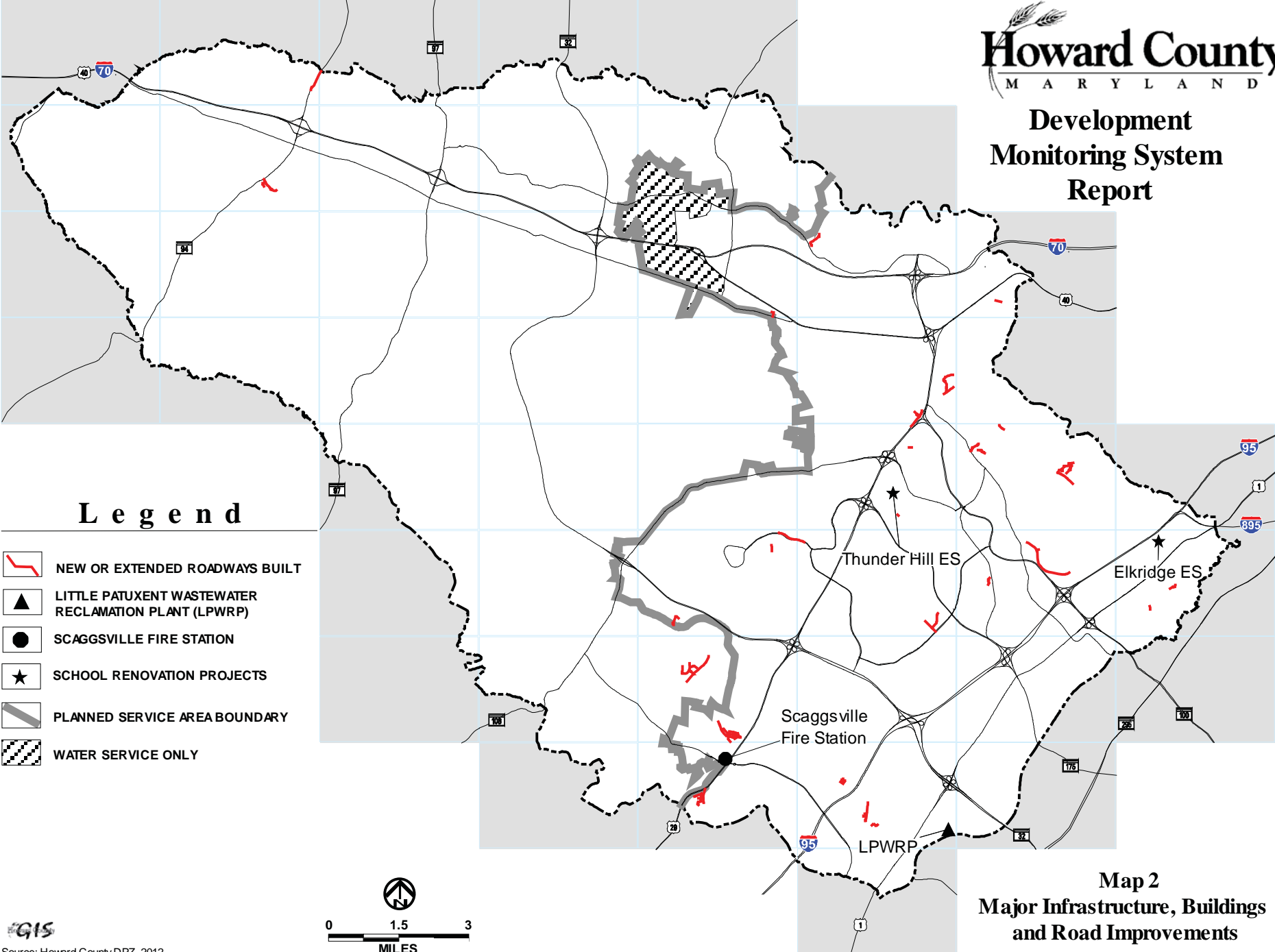
The Smart, Green and Growing Legislation requires that development patterns and infrastructure improvements that have occurred over the last year be evaluated for consistency with adopted local plans. An evaluation of whether these changes are consistent with each other as well as the adopted plans of adjoining jurisdictions is also required.

Overall, private development, new infrastructure and regulatory and zoning map amendments that took place in Howard County last year are consistent with our local plans – most importantly the county’s General Plan – as well as with each other and the adopted plans of adjoining jurisdictions.







Howard County’s growth policy is to concentrate higher density development in the eastern portion of the county while preserving the Rural West. The development patterns and regulatory initiatives summarized in this report continue to support this goal. For example, all the major community facilities and school projects that have been completed in 2012 are located within the Priority Funding Area. Furthermore, with the adoption of the Downtown Columbia Partnership further progress has been achieved on establishing the implementing structure for the revitalization of Downtown Columbia, which will be transformed into a higher density mixed-use community over the next several decades. The designation of Ellicott City as a Sustainable Community also furthers growth and revitalization within the Priority Funding Area.



Development Monitoring System Report



Legend

-  NEW OR EXTENDED ROADWAYS BUILT
-  LITTLE PATUXENT WASTEWATER RECLAMATION PLANT (LPWRP)
-  SCAGGSVILLE FIRE STATION
-  SCHOOL RENOVATION PROJECTS
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

Map 2
Major Infrastructure, Buildings
and Road Improvements

Source: Howard County DPZ, 2012.

Lot Densities

The information provided in the subsequent sections of this report include details on the amount, type and location of development in Howard County in 2012. Progress on land preservation is also reported on. The Smart, Green and Growing legislation now requires all jurisdictions in Maryland to report on net density of growth both inside outside priority funding areas (PFA).

The Maryland Department of Planning and Zoning was tasked to come up with a methodology on how to do this to achieve statewide consistency. In early 2011, they decided upon a methodology which is to calculate the number of units built divided by the unit(s) lot size. It should be noted that while this methodology is a general determinant of density, it does not address land preservation through the creation of open space and cluster preservation lots resulting from most residential development. Nonetheless, it is a good general way to report on density achieving consistency across jurisdictions. Howard County DPZ classifies this type of density measurement as *lot density*.

Lot Density by Planning Area

Table 1 shows the lot density of residential development in 2012 based on building permit completions. A weighted average of density is calculated from built dwelling units and their associated lot size. Note that for multiple units built on a single parcel, only completed projects are included. For example, if only one apartment building on a parcel is completed in 2011, but the parcel is to include more than one building, then that project and associated density is not counted in the current year. It will be counted in a future year when the entire project is finished. This could apply to rental and condo apartments and condo townhomes.

The greatest average lot density occurred in the Southeast at 26.50 units per acre based on 645 units built. This was followed by Elkridge at 16.43 units per acre, and then Ellicott City at 11.72 units per acre. Columbia saw an average lot density of 2.96 units per acre for projects completed in 2012 (all SFD units). The Rural West, as expected, had the lowest average lot density at 0.85 units per acre. This is shown graphically in Chart 5.

Lot Density Inside Versus Outside PFA

Table 2 shows the lot density inside and outside the PFA. Outside the PFA is the combined results of all planning areas excluding the Rural West. Combining all east county planning areas results in a lot density of 17.50 units per acre. This compares to a much smaller lot density of 0.85 units per acre outside the PFA.

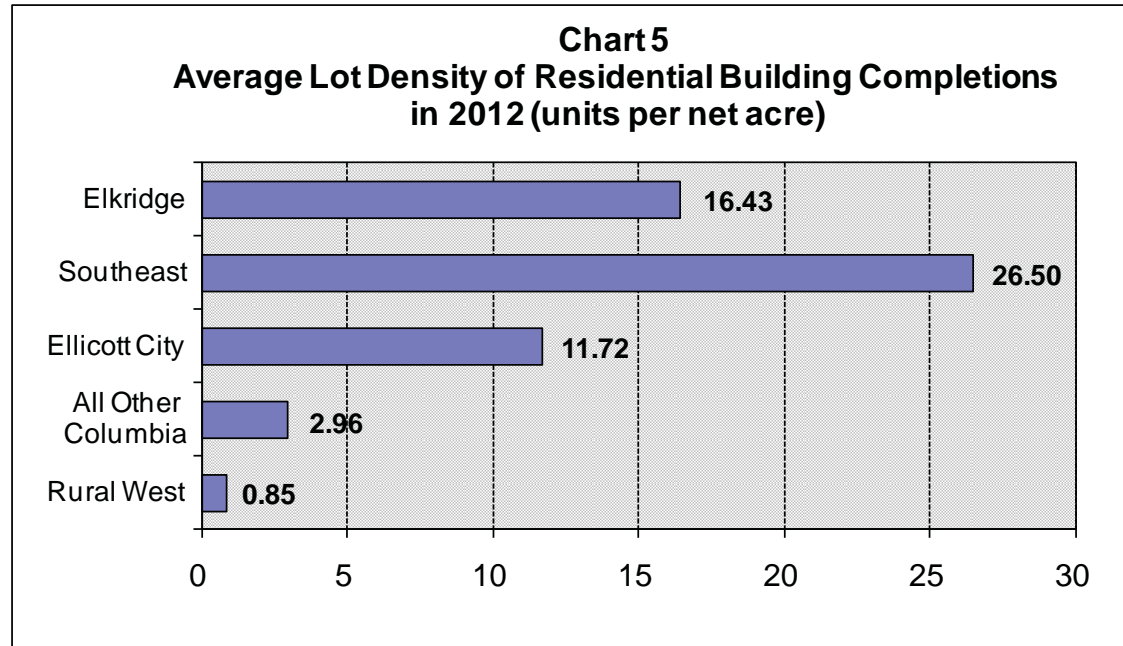
Map 3 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2012 - By Planning Area

Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Downtown Columbia	0	0%	0	0%	NA
All Other Columbia	25	2%	12	3%	2.96
Elkridge	256	17%	39	9%	16.43
Ellicott City	446	29%	58	13%	11.72
Rural West	156	10%	277	64%	0.85
Southeast	645	42%	46	11%	26.50
TOTAL	1,528	100%	433	100%	17.50

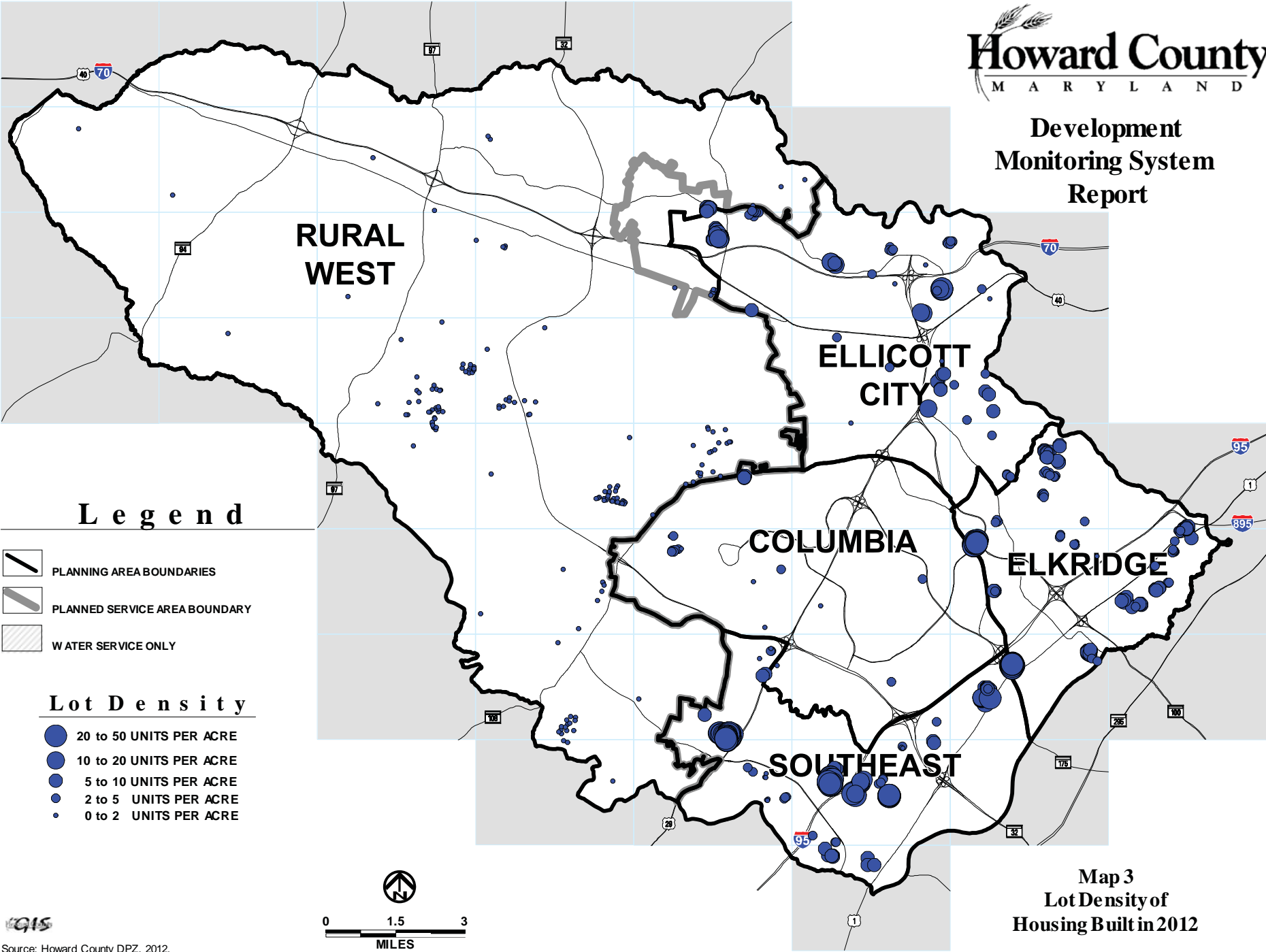
Table 2
Lot Density of Total Units Built in 2012- Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,372	90%	156	36%	19.39
Outside PFA	156	10%	277	64%	0.85
TOTAL	1,528	100%	433	100%	17.50





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Map 3 Lot Density of Housing Built in 2012

Source: Howard County DPZ, 2012.

Local Growth Goal

The Smart, Green and Growing legislation stipulates that the statewide land use goal is to increase the percentage of growth located within the Priority Funding Areas and to decrease the percentage of growth located outside the Priority Funding Areas (PFA). Under the legislation local jurisdictions are required to report on their local goal, the timeframe for achieving the local goal, the resources necessary for infrastructure inside the priority funding area and land preservation outside the priority funding area, and any incremental progress made towards achieving the local goal.

Howard County’s Growth Goal

The basis for Howard County’s growth goal is the latest general plan, known as PlanHoward 2030, recently adopted in July, 2012. This plan specifically indicates how many units are to be built each year both inside and outside the County’s Priority Funding Area. The County’s Adequate Public Facilities Ordinance (APFO) is the mechanism to ensure that this growth goal is adhered to.

PlanHoward 2030 reduces the annual number of housing unit allocations outside the Priority Funding Area in the Rural West to 100 per year. It had most recently been 150 per year based on the latest APFO amendments. Prior to that with the adoption of the 2000 General Plan in November of 2000 the number had been 250 per year. The initial reduction from 250 units to 150 units were based on the re-allocation of 100 units to a new “Green Neighborhood” allocation pool reserved for units inside the Priority Funding Area. To receive Green Neighborhood allocations, the project must meet both site and building design criteria for environmental sustainability. With the recent adoption of PlanHoward 2030 an additional 50 units were shifted from the Rural West to the Green Neighborhood allocation pool. This policy change therefore not only reduces the annual number of units built outside the PFA, but also enables more sustainable development within the PFA.

The general plan was also recently amended in 2010 to allow additional units to Downtown Columbia as part of the Downtown Master Plan. The APFO housing unit allocation chart, adopted annually by the County Council, reflects this change allowing more units in Downtown Columbia.

Table 3 summarizes future growth based on PlanHoward 2030 to the year 2030. A total of 1,900 units are allocated to areas outside the PFA, representing only 5.1% of all units countywide. The remaining 94.9% of units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2012 unit counts, 12.5% of all housing units in the County are outside the PFA. The remaining 87.5% are inside the PFA. This is summarized in Table 4.

Comparing this to the PlanHoward 2030 policy of allocating only 5.1% of future units to areas outside the PFA it is clear that progress towards the goal of decreasing the percentage of growth outside the PFA is being met. Table 5 below shows total units built and allocated by 2030. The percentage of total units outside the PFA will decrease between now and then.

Table 3
PlanHoward 2030 Growth Projections
2013 to 2030

Inside PFA	35,600	94.9%
Outside PFA	1,900	5.1%
Total	37,500	100.0%

Table 4
Total Built Units in Howard County
September 30, 2012

Inside PFA	96,062	87.5%
Outside PFA	13,668	12.5%
Total	109,730	100.0%

Table 5
Total Units by 2030 based on PlanHoward 2030

Inside PFA	131,662	89.4%
Outside PFA	15,568	10.6%
Total	147,230	100.0%

Resources to Achieve Goal

Besides the County's APFO described above that regulates the timing and location of growth, the Agricultural Land Preservation Program, described in detail beginning on Page 48 of this report, also helps reduce development capacity outside of the PFA while preserving land. The County's rural zoning is an additional mechanism preserving environmental or agricultural easements in place of housing units through a density transfer mechanism. This has been in place since the early 1990's.

Other resources include road and schools excise taxes on new construction. These excise tax revenues are used to fund new major road and school capacity enhancements directly related to new growth. It is the goal to use such revenues for new infrastructure inside the PFA.

The County has also created higher density mixed-use zones along redevelopment areas such as Route 1 and Route 40 over the last decade. This zoning approach has created additional capacity in the east concentrating growth there at a higher percentage than the Rural West part of the County outside the PFA.

Furthermore, with the adoption of PlanHoward 2030, Designated Places and Growth Tiers are now established in Howard County further slowing growth in the Rural West and concentrating growth in redevelopment areas within the Priority Funding Area. Please refer to PlanHoward 2030 for a discussion on and maps depicting the Designated Places and Growth Tiers in Howard County.

Residential Development

Recorded Residential Subdivisions

The residential development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a multi-phase plan review process: environmental concept plan, sketch plan, preliminary plan and final plan;
- a consolidated review: environmental concept plan, preliminary equivalent sketch plan and final plan;
- a minor review (four buildable lots or less) involving only an environmental concept plan and a final plan;

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units, such as apartment buildings and condominium developments on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on in 2012 were recorded or in existence prior to 2007, the first year of this current DMS analysis period. Therefore, units from 2012 recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential plans recorded, the number of potential units from recorded lots, and the acreage of plans recorded have been compiled by the planning areas shown on the Policies Map on Page 6 plus Downtown Columbia as it's own area.

Summary of Latest Reporting Period

For the latest reporting period from January 1, 2012 through December 31, 2012, there was potential for 1,742 housing units from recorded lots countywide in 91 subdivision plans totaling 1,334 acres (Table 6). Downtown Columbia had the most with 817 units, 47% of the total. Elkrigde had 282 units, 16% of the total. Ellicott City had potential for 262 units, 15% of the total. There were 170 units in recorded subdivision plans in the Southeast (10%), 158 units in Columbia (9%), and 53 units in the Rural

West (3%). These represent net new unit potential and do not include total recorded lots from resubdivisions. For example, resubdivisions may combine existing lots to create a smaller number of new lots compared to the original. Or subdivisions may be recorded to simply adjust lot lines or add easements. If known, condo townhouse or apartment units are included in the unit total for large parcel recordations.

Of the total 1,334 acres recorded, 617 acres, or about 46%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity given that these figures include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

Table 7 shows new units from recorded lots by unit type. Of the 1,742 units from recorded lots, 330 are for single family detached units (SFD), 451 are for single family attached or townhouse units (SFA), and 961 are

for apartment units (both rental and condo). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions, 1/01/12 to 12/31/2012

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	817	47%	1	1%	13	1%
All Other Columbia	158	9%	6	7%	38	3%
Elkridge	282	16%	22	24%	128	10%
Ellicott City	262	15%	21	23%	418	31%
Rural West	53	3%	22	24%	617	46%
Southeast	170	10%	19	21%	121	9%
TOTAL	1,742	53%	91	99%	1,334	99%

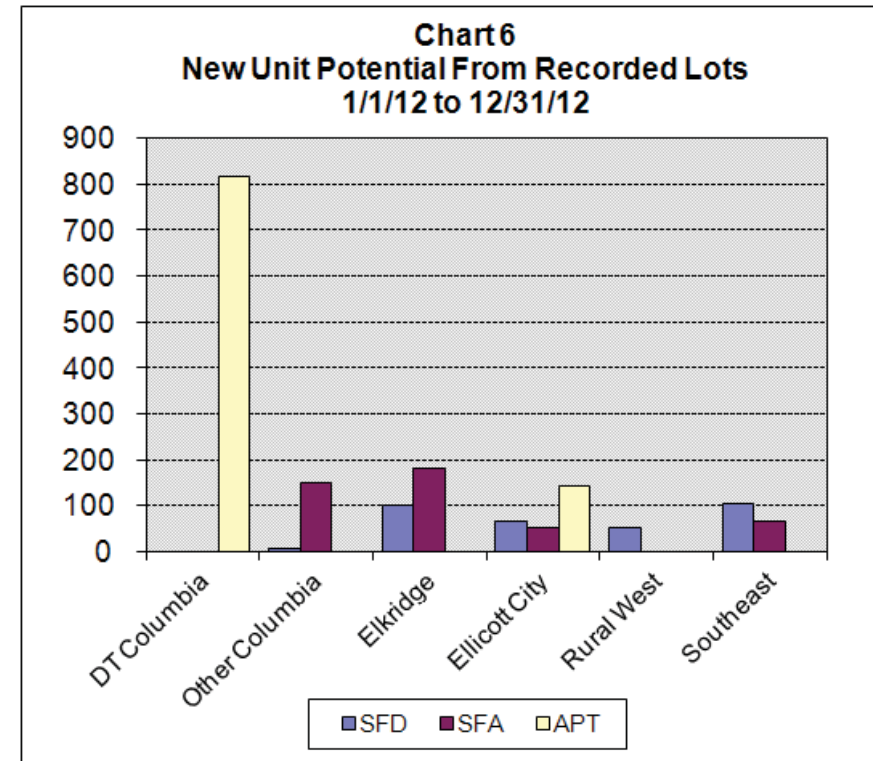


Table 7
Unit Potential from Recorded Lots by Unit Type, 1/01/12 to 12/31/2012

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	817	0	817	47%
All Other Columbia	8	150	0	0	158	9%
Elkridge	101	181	0	0	282	16%
Ellicott City	65	53	144	0	262	15%
Rural West	53	0	0	0	53	3%
Southeast	103	67	0	0	170	10%
TOTAL	330	451	961	0	1,742	100%
PERCENT	19%	26%	55%	0%	100%	

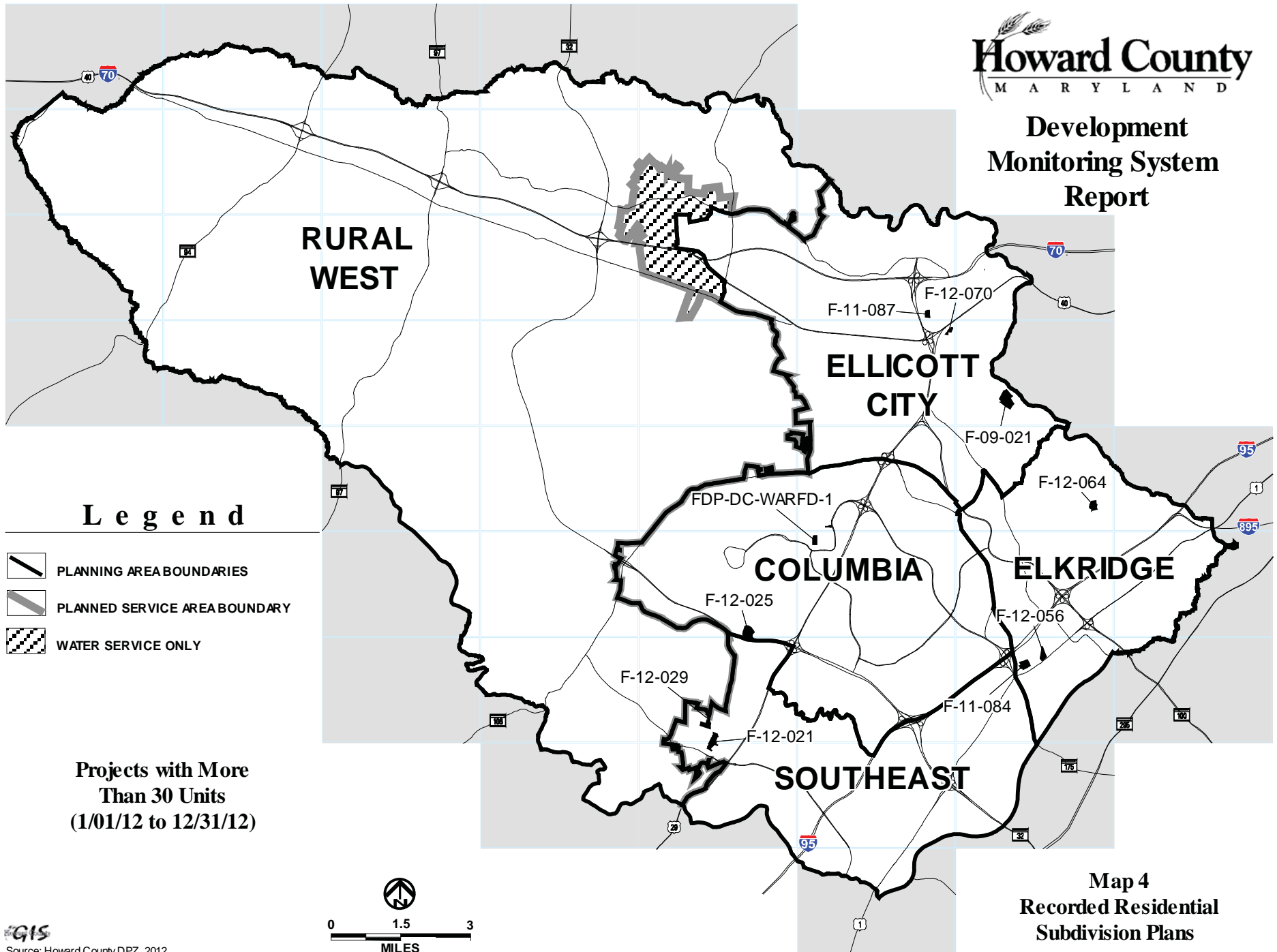
Last Year's Projects - Greater than 30 Units

Of the total 1,742 units from lots recorded for the latest reporting period, 1,534 or about 88% were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 8, are located in all planning areas except the Rural West. The precise location of these plans are shown on Map 4.

These larger plans include Warfield in Downtown Columbia; Simpson Mill in Columbia; Blue Stream, Howard Square, and Grovemont Overlook in Elkridge; Orchard Meadows, Autumn River and Ellicott Crossing in Ellicott City; and two subdivisions in Maple Lawn Farms in the Southeast.



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Projects with More Than 30 Units (1/01/12 to 12/31/12)

Map 4 Recorded Residential Subdivision Plans

Source: Howard County DPZ, 2012.

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 1/01/12 to 12/31/12

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Downtown Columbia	FDP-DC-WARFD-1	Warfield	APT	817	817
All Other Columbia	F-12-025	Simpson Mill	SFA - 5 MIHU	150	150
Elkridge	F-12-056	Blue Stream	SFA - 24 MIHU	125	211
	F-11-084	Howard Square	SFA	56	
	F-12-064	Grovemont Overlook	SFD	30	
Ellicott City	F-11-087	Orchard Meadows	APT - 15 MIHU	144	218
	F-09-021	Autumn River - Ph. 2	SFD & SFA	37	
	F-12-070	Ellicott Crossing - Part 1	SFA	37	
Southeast	F-12-021	Maple Lawn Farms	SFA	67	138
	F-12-029	Maple Lawn Farms	SFD	71	
TOTAL					1,534

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in October 1, 2007. (Note there is an extra quarter included due to the change in the analysis timeframe.) Over this time period lots for 5,819 units countywide in 586 subdivision plans totaling 15,021 acres were recorded. This equates to an annual average of 1,108 units per year.

Note that the acreage figure represents all acreage on recorded plats including open space and preservation easements, as well as resubdivisions, sending and receiving preservation parcels, and recordations that do not

add any new units such as recording for the purpose of adding easements or adjusting parcel lines.

Table 10 summarizes the number of units from recorded lots by unit type for each of the last five reporting periods. Over this timeframe, recorded lots created the potential for 1,815 single family detached units, 31% of the total 5,819. A total of 1,721, 30%, were for single family attached units and the remaining 2,283, 39%, were for apartments units (rental and condo).

Table 9
Recorded Residential Subdivisions, 10/01/07 to 12/31/12

Year	Units	Plans	Acreage
10/07 to 9/08	1,873	165	6,869
10/08 to 9/09	569	116	2,678
10/09 to 12/10 *	979	126	1,793
1/11 to 12/11	656	88	2,347
1/12 to 12/12	1,742	91	1,334
TOTAL	5,819	586	15,021
ANNUAL AVG.	1,108	112	2,861

* Extra quarter included due to change in analysis timeframe

Table 10
Unit Potential From Recorded Lots by Unit Type, 10/01/07 to 12/31/12

Year	SFD	SFA	APT	MH	Total
10/07 to 9/08	555	290	1,028	0	1,873
10/08 to 9/09	249	243	77	0	569
10/09 to 12/10 *	362	400	217	0	979
1/11 to 12/11	319	337	0	0	656
1/12 to 12/12	330	451	961	0	1,742
TOTAL	1,815	1,721	2,283	0	5,819
PERCENT	31%	30%	39%	0%	100%
ANNUAL AVG.	346	328	435	0	1,108

* Extra quarter included due to change in analysis timeframe

In-Process Residential Subdivisions

As indicated in the previous section, the residential development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a multi-phase plan review process: environmental concept plan, sketch plan, preliminary plan and final plan;
- a consolidated review: environmental concept plan, preliminary equivalent sketch plan and final plan;
- a minor review (four buildable lots or less) involving only an environmental concept plan and a final plan;

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in several stages (environmental concept, sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of December 31, 2012 are tabulated and compared with those in process the prior year (as of December 31, 2011).

Number of Plans

Six less residential plans were in process as of December 31, 2012 than there were one year earlier – 182 plans in 2012 compared to 188 plans in 2011 (Table 11).

For the current year, the Rural West had the greatest number of residential plans in process with 63, followed by Ellicott City with 43. Elkridge and the Southeast had 39 and 27 plans in process, respectively. Columbia had 10 plans in process.

Of the 182 plans in process on December 31, 2012, 115 were final plans, 29 were environmental concept plans, 15 were sketch plans, 20 were preliminary equivalent sketch plans and 3 were preliminary plans.

Number of Potential Units

There were 949 less units in process on December 31, 2012 compared to the previous year – 7,069 units compared to 8,018 units (Table 12).

It is important to note that a significant number of the 7,069 potential units in process are part of phased projects with building planned for future

Table 11
Number of Residential Subdivision Plans in Process, 12/31/12
(With comparisons to Countywide total as of 12/31/11)

Planning Area	Environmental		Preliminary Equivalent			TOTAL PLANS
	Concept	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	1	0	1	0	8	10
Elkridge	4	7	4	2	22	39
Ellicott City	8	6	2	0	27	43
Rural West	11	0	9	0	43	63
Southeast	5	2	4	1	15	27
TOTAL	29	15	20	3	115	182
As of 12/31/11	11	17	21	1	138	188

years. Phasing is often a developer's preference, but also results from APFO regulations that limit the number of allocations available each year. As shown in Table 13, 5,447 units are part of phased plans, with building planned as far out as 2019. Phased plans represent 77% of the total units in process.

The larger phased projects include Maple Lawn Farms and Laurel Park Station in the Southeast; The Overlook at Blue Stream, Howard Square, Oxford Square and Morris Place in Elkridge; Turf Valley and the Courtyards West in Ellicott City; and Walnut Creek in the Rural West.

As reflected in Table 12, 23% of the units in process are single family detached units. About 22% are single family attached units and 55% are apartment units (condo or rental). Table 14 shows details by plan stage and unit type for this year by planning area. Chart 7 graphically illustrates the units in process by unit type for each planning area.

Table 12
Number of Potential Units from Subdivision Plans in Process, 12/31/12
 (With comparisons to Countywide total as of 12/31/11)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	0	0	0
All Other Columbia	25	0	250	0	275
Elkridge	260	553	2,241	0	3,054
Ellicott City	454	698	365	0	1,517
Rural West	343	0	0	0	343
Southeast	544	310	1,026	0	1,880
TOTAL	1,626	1,561	3,882	0	7,069
PERCENT	23%	22%	55%	0%	100%
As of 12/31/11	1,718	1,877	4,423	0	8,018

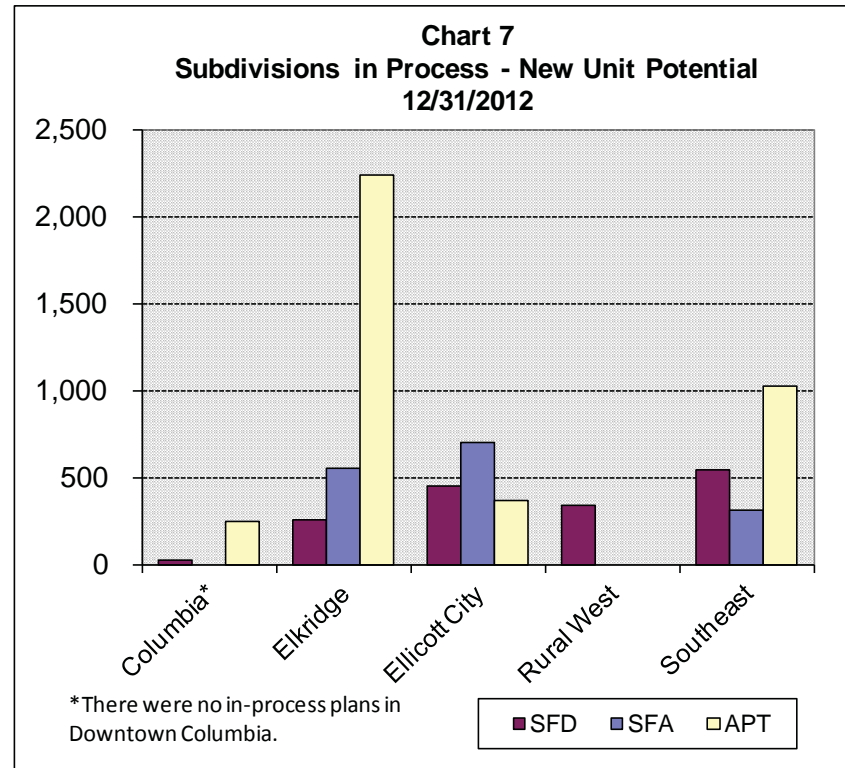


Table 13
Potential Units from Phased Projects

Planning Area	2013	2014	2015	2016	2017	2018	2019	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	0	0	0
Elkridge	0	298	488	561	410	573	330	2,660
Ellicott City	215	150	145	145	197	200	200	1,252
Southeast	252	371	406	330	41	0	0	1,400
Rural West	0	45	45	45	0	0	0	135
TOTAL	467	864	1,084	1,081	648	773	530	5,447

Note: Does not include phased project units on already recorded plats or signed SDP's.

Table 14
Number of Potential Units from Subdivision Plans in Process by Unit Type, 12/31/12

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	0	0	250	0	250
Elkridge	102	474	2,241	0	2,817	67	0	0	0	67
Ellicott City	211	337	253	0	801	109	0	0	0	109
Rural West	0	0	0	0	0	92	0	0	0	92
Southeast	126	88	774	0	988	274	92	0	0	366
TOTAL	439	899	3,268	0	4,606	542	92	250	0	884

Planning Area	Preliminary					Final					TOTAL - 12/31/12				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	25	0	0	0	25	25	0	250	0	275
Elkridge	0	19	0	0	19	91	60	0	0	151	260	553	2,241	0	3,054
Ellicott City	0	0	0	0	0	134	361	112	0	607	454	698	365	0	1,517
Rural West	0	0	0	0	0	251	0	0	0	251	343	0	0	0	343
Southeast	0	0	252	0	252	144	130	0	0	274	544	310	1,026	0	1,880
TOTAL	0	19	252	0	271	645	551	112	0	1,308	1,626	1,561	3,882	0	7,069

Number of Acres

As of December 31, 2012 a total of 4,234 acres of residential land were in the subdivision process. This is 281 acres less compared to the previous year, at which time there were 4,515 acres in process (Table 15).

Major Projects

Table 16 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive and phased projects. Map 5 shows the location of these projects. Some of the larger projects in this list include The Overlook at Blue Stream, Oxford Square, Howard Square, Turf Valley, and Laurel Park Station. These major projects with 50 or more units total 6,292 units which account for about 89% of the total 7,069 units in the subdivision process.

Table 15
Acres of Residential Subdivision Plans in Process, 12/31/12
(With comparisons to Countywide total as of 12/31/11)

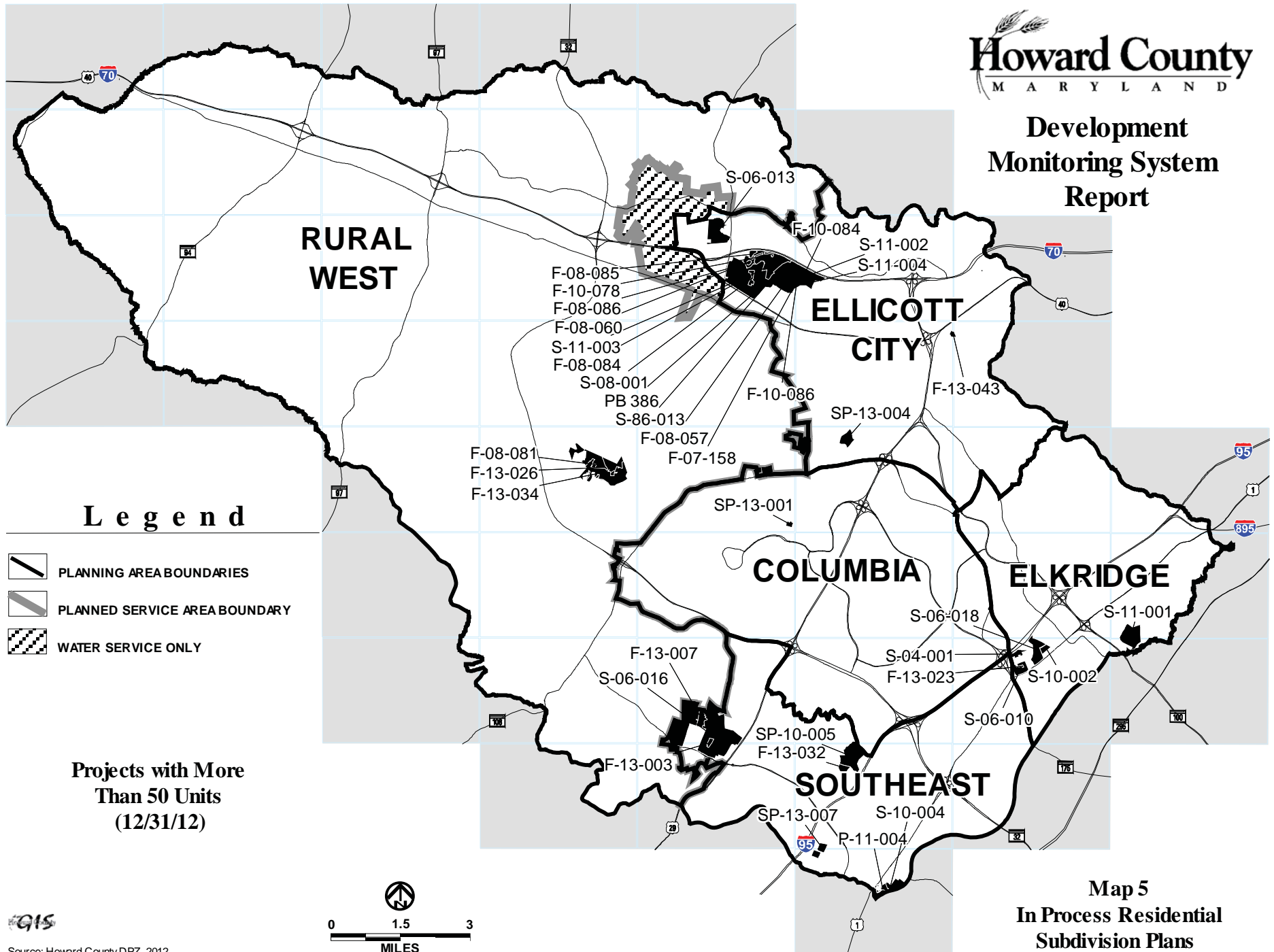
Planning Area	Preliminary Equivalent Sketch				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	10	0	25	35
Elkridge	307	69	93	184	652
Ellicott City	326	58	0	476	860
Rural West	0	341	0	1,804	2,145
Southeast	174	183	15	169	541
TOTAL	807	660	108	2,659	4,234
As of 12/31/11	863	992	15	2,645	4,515

**Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/12**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SP-13-001	Village or Wilde Lake Redevelopment	APT	250	250
Elkridge	S-06-018	The Overlook at Blue Stream	SFA, APT - 178 MIHU	966	
	S-11-001	Oxford Square	APT - 143 MIHU	954	
	S-06-010, F-13-023	Howard Square	SFA, APT - 129 MIHU	556	
	S-10-002	Morris Place	SFA - 28 MIHU	184	
	S-04-001	Village Towns	APT	67	
					2,727
Ellicott City	S-86-013, PB 386	Turf Valley - Remaining Phases	SFD, SFA, APT	342	
	F-08-060/F-08-084,-85,-86/F-10-078	Villages at Turf Valley	SFD, SFA, APT	219	
	S-08-001	Turf Valley Clubhouse	SFD, SFA, APT	128	
	S-11-002	The Bluffs at Turf Valley	APT	114	
	F-13-043	Ellicott Crossing Part II	SFA	99	
	F-10-084/F-10-086/F-07-158	Fairways at Turf Valley	SFD, SFA	98	
	SP-13-004	Mason Property	SFD	92	
	S-06-013	The Courtyards at Waverly Woods West - Ph. 5	SFD, SFA - Age Restricted	90	
	S-11-004	Turf Valley - Pod E	SFD, SFA	74	
	F-08-057	Vantage Condominiums at Turf Valley	APT	69	
	S-11-003	Turf Valley Clubhouse II	SFD, SFA	53	
					1,378
Rural West	F-08-081/F-13-026/F-13-034	Walnut Creek - Phase 2 to 4	SFD	135	135
Southeast	S-10-004/P-11-004	Laurel Park Station - All Phases	APT - 150 MIHU	1,000	
	S-06-016/F-13-003/F-13-007	Maple Lawn Farms - Phases 9 to 12	SFD, SFA, APT	368	
	SP-10-005	Wincopia Farms	SFD, SFA	219	
	SP-13-007	Deer Springs	SFD, SFA	128	
	F-13-032	Walden Woods	SFA - Age Restricted	87	
TOTAL					6,292



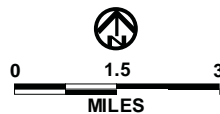
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Projects with More Than 50 Units (12/31/12)



Map 5
In Process Residential Subdivision Plans

Source: Howard County DPZ, 2012.

Approved Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. SDP approval is therefore a good indicator of near term development activity in the planned service area. However, SDPs are not required for single family detached lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the five planning areas. The number of residential site development plans approved, the number of residential lots approved, and the acreage of approved plans have been compiled for each of these areas and are discussed below.

Summary of Latest Reporting Period

From 01/01/2012 thru 12/31/2012 there were 1,667 housing units approved in 55 site development plans totaling about 312 acres (Table 17). The Elkridge had 882 approved units followed by Ellicott City with 407 units, the Southeast with 213 and Columbia with 165.

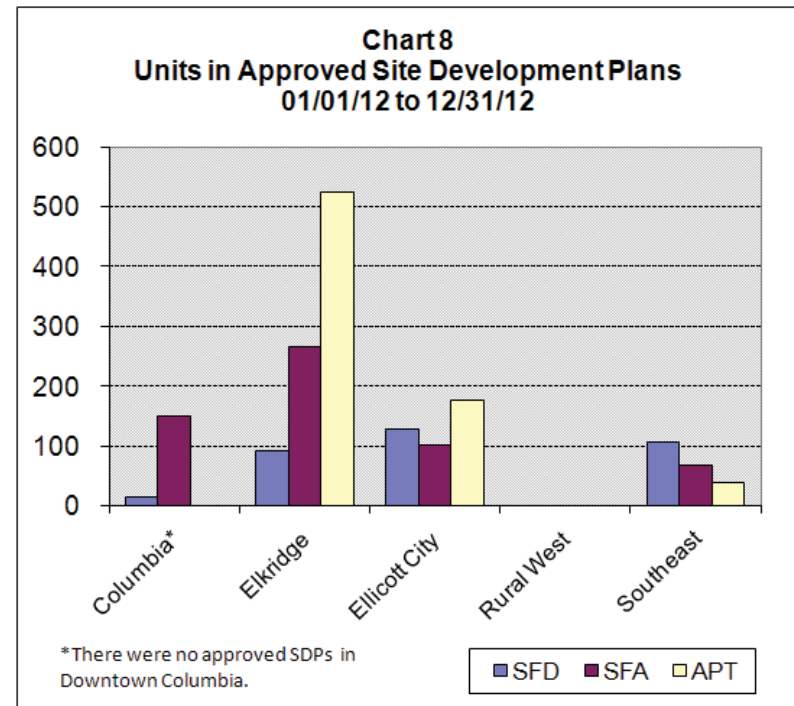
Table 18 shows new units from approved site development plans by unit type. Of the 1,667 approved units, 21% were for single family detached units, 35% were for single family attached or townhouse units and 44% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 17
Approved Residential Site Development Plans, 1/01/12 to 12/31/12

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	165	10%	6	11%	34	11%
Elkridge	882	53%	16	29%	68	22%
Ellicott City	407	24%	17	31%	168	54%
Rural West	0	0%	0	0%	0	0%
Southeast	213	13%	16	29%	42	13%
TOTAL	1,667	100%	55	100%	312	100%

Table 18
Approved Units from SDP's by Unit Type, 1/01/12 to 12/31/12

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	15	150	0	0	165	10%
Elkridge	92	265	525	0	882	53%
Ellicott City	129	102	176	0	407	24%
Rural West	0	0	0	0	0	0%
Southeast	106	67	40	0	213	13%
TOTAL	342	584	741	0	1,667	100%
PERCENT	21%	35%	44%	0%	100%	



Last Year's Projects - Greater than 30 Units

Of the total 1,667 units approved in site development plans last year, 1,506 or about 90% were in part of projects consisting of more than 30 units. These larger projects, shown in Table 19, are located in four planning areas. The location of these plans are shown on Map 6.

Five Year Results

Tables 20 and 21 show the approved residential site development plans from October 1, 2007 to December 31, 2012. Over this five and a quarter year period 5,938 units were approved countywide in 288 site development plans totaling about 1,266 acres.

The last reporting period saw an increase in approved units compared to the previous period - 1,667 versus a 823 units approved.

Table 19
Approved Residential SDP's, Projects With More Than 30 Units, 1/01/12 to 12/31/12

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-12-015	Simpson Mill	SFA - 5 MIHU	150	150
Elkridge	SDP-12-018	Howard Square Ph. 3 & 4	APT	299	
	SDP-11-032	Grosvenor House (Blue Stream)	SFA, APT	254	
	SDP-11-040	Dorset Gardens (Blue Stream)	SFA - 24 MIHU	125	
	SDP-11-043, SDP-11-054	Howard Square	SFA - 27 MIHU	112	
	SDP-12-024	Grovemont Overlook	SFD	31	
					821
Ellicott City	SDP-11-052	Orchard Meadows	APT - 15 MIHU	144	
	SDP-09-039	Waverly Courtywards West	SFD, SFA - Age Restricted	100	
	SDP-11-057	Ellicott Mills Overlook, Part 1	APT - Age Restricted, SFA - 8 MIHU	69	
	SDP-12-053	Autumn River - Ph. 2	SFD, SFA	39	
					352
Southeast	SDP-12-50, -051, -052	Maple Lawn Farms	SFD	76	
	SDP-12-069, SDP-13-010	Maple Lawn Farms	SFA	67	
	SDP-11-046	Maple Lawn Farms	APT	40	
					183
TOTAL					1,506

Table 20
Approved Units in Residential Site Development Plans, 10/01/07 to 12/31/12

Year	SFD	SFA	APT	MH	Total
10/07 to 9/08	285	466	812	0	1,563
10/08 to 9/09	261	156	159	0	576
10/09 to 12/10 *	413	572	324	0	1,309
01/11 to 12/11	279	322	222	0	823
01/12 to 12/12	342	584	741	0	1,667
TOTAL	1,580	2,100	2,258	0	5,938
PERCENT	27%	35%	38%	0%	100%
ANNUAL AVG.	301	400	430	0	1,131

* Extra quarter included due to change in analysis timeframe

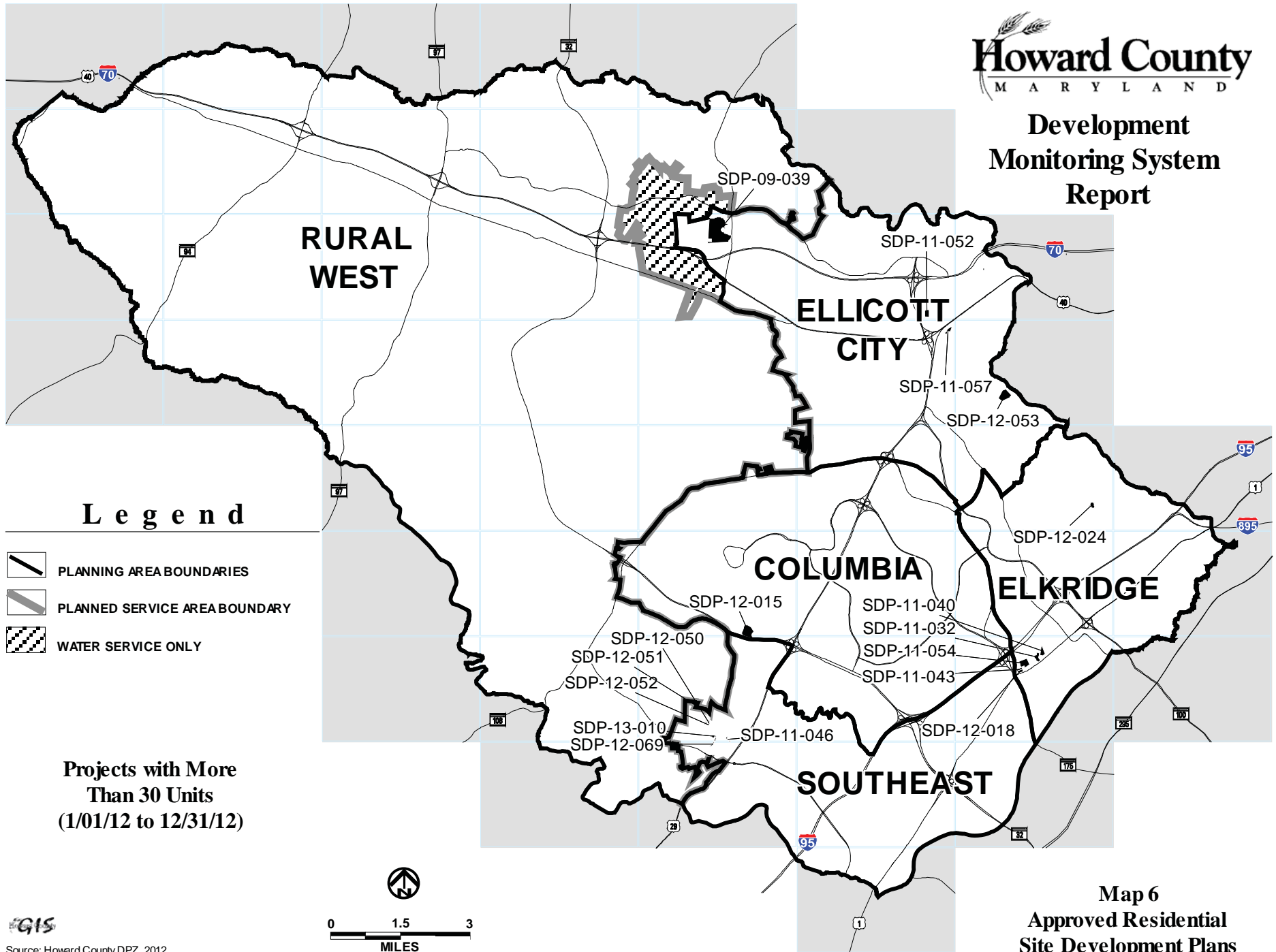
Table 21
Approved Residential Site Development Plans, 10/01/07 to 12/31/12

Year	Units	Plans	Acreage
10/07 to 9/08	1,563	72	192
10/08 to 9/09	576	47	154
10/09 to 12/10 *	1,309	72	433
01/11 to 12/11	823	42	175
01/12 to 12/12	1,667	55	312
TOTAL	5,938	288	1,266
ANNUAL AVG.	1,131	55	241

* Extra quarter included due to change in analysis timeframe



Development Monitoring System Report



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- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Projects with More
Than 30 Units
(1/01/12 to 12/31/12)



Map 6
Approved Residential
Site Development Plans

In-Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of plans, potential units and acreage currently being processed as of December 31, 2012 are tabulated and compared to those in process a year earlier (as of December 31, 2011). SDPs are generally not required for large lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Number of Plans

There were 3 less residential site development plans in process as of December 31, 2012 compared to the prior reporting period, 43 plans compared to 46 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 12/31/11 & 12/31/12

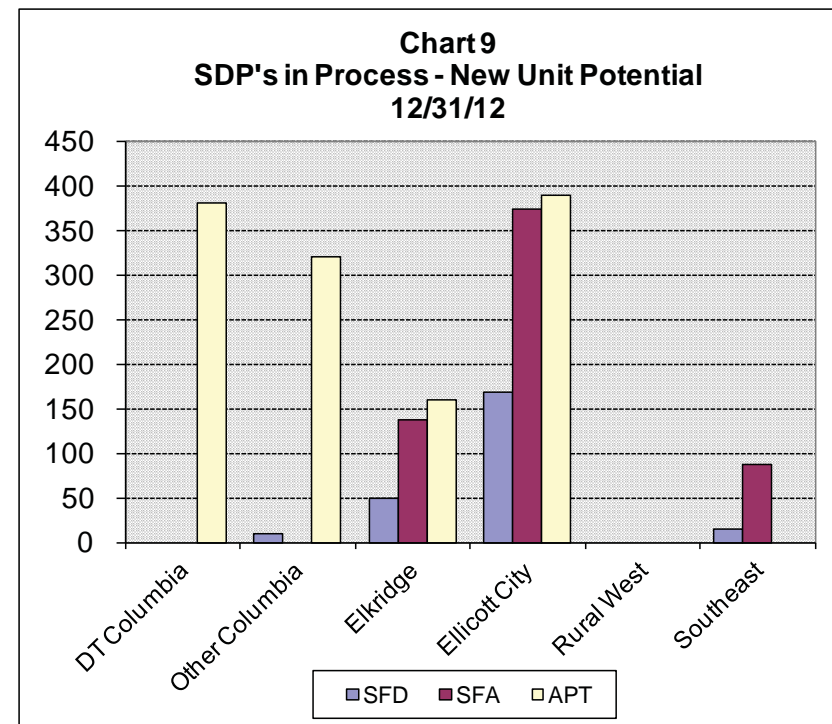
Planning Area	2012	2011
Downtown Columbia	1	0
All Other Columbia	5	6
Elkridge	12	14
Ellicott City	20	18
Rural West	0	0
Southeast	5	8
TOTAL	43	46

Number of Potential Units

There were slightly more units in process as of December 31, 2012 compared to December 31 of the previous year, 2,091 units compared to 2,019 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 1,250 proposed units in 2012. This is followed by 498 proposed single family attached or townhouse units and 243 single family detached units. Chart 9 graphically illustrates the units in process by unit type for the current year by planning area.

Table 23
Number of Potential Units from Site Development Plans in Process, 12/31/12
(With comparisons to Countywide total as of 12/31/11)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	380	0	380
All Other Columbia	9	0	320	0	329
Elkridge	50	137	160	0	347
Ellicott City	169	374	390	0	933
Rural West	0	0	0	0	0
Southeast	15	87	0	0	102
TOTAL	243	598	1,250	0	2,091
As of 12/31/11	291	686	1,042	0	2,019



Number of Acres

As of December 31, 2012 a total of 375 acres of residential land were in the site development plan process. This is slightly less than the previous year when there were 390 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects containing 30 units or more. Map 7 shows the location of these projects. Of the 2,142 units in the site development plan process, 1,958 or about 94% were in projects with more than 30 units.

Some of the larger projects include the Warfield, Phase 1 in Downtown Columbia, Paragon at Gateway Overlook, Lutheran Village at Millers Grant and the Gatherings at Ellicott Mills.

Table 24
Acreeage of Residential SDP's In Process, 12/31/12 & 12/31/11

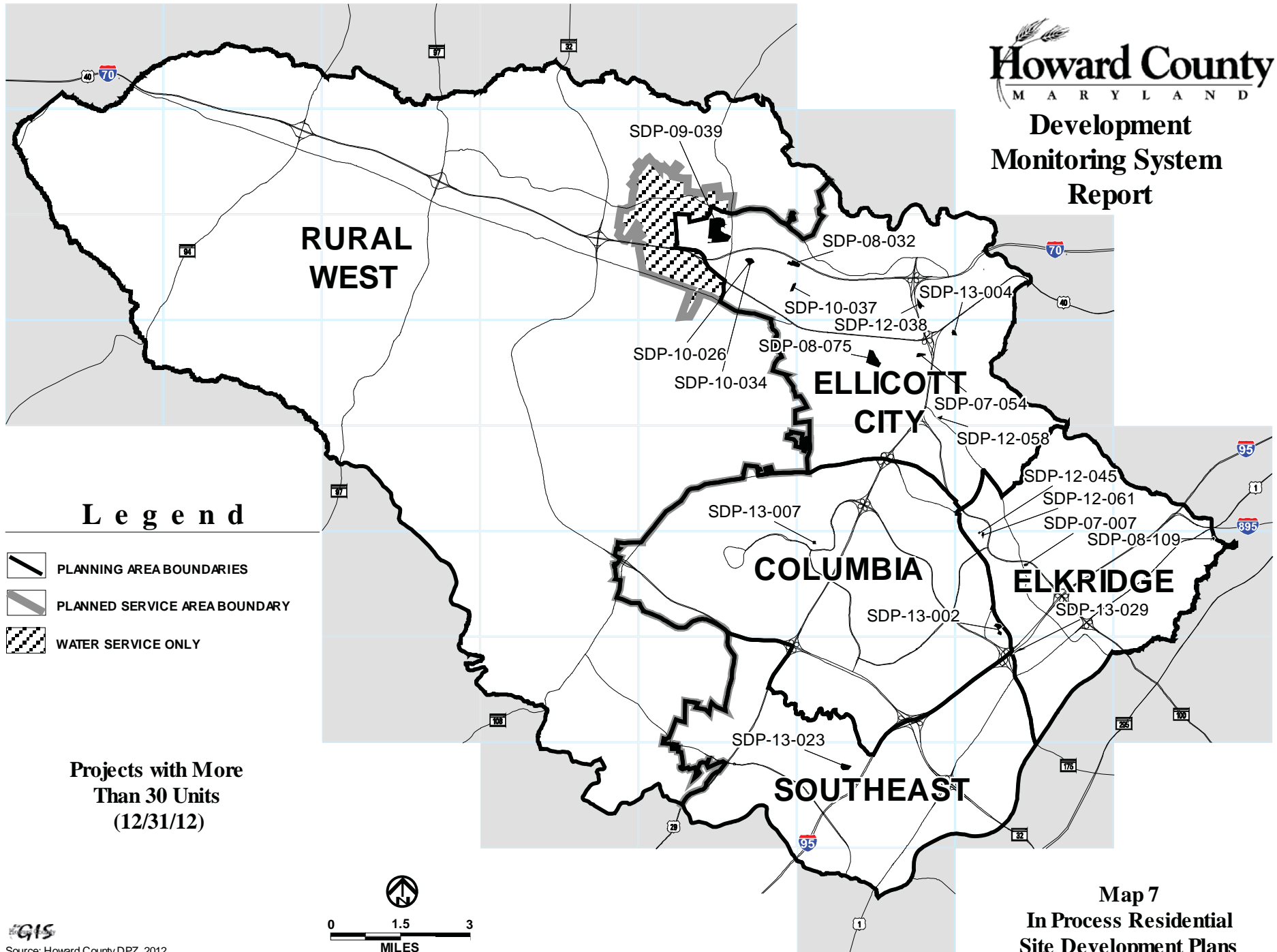
Planning Area	2012	2011
Downtown Columbia	5	0
All Other Columbia	28	38
Elkridge	38	87
Ellicott City	270	255
Rural West	0	0
Southeast	34	10
TOTAL	375	390

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/12

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-13-007	Warfield, Phase I	APT	380	380
Columbia	SDP-13-002	Paragon at Gateway Overlook	APT	320	320
Elkridge	SDP-12-061	Shipleys Grant	SFA - 4 MIHU	87	
	SDP-13-029	Deep Falls	APT - 55 MIHU	80	
	SDP-08-109	Riverwatch	APT - 12 MIHU	47	
	SDP-12-045	Shipleys Grant	APT	32	
	SDP-07-007	Fox Hunt Estates	SFA - 4 MIHU	32	
Ellicott City	SDP-08-075	Lutheran Village at Millers Grant	SFD, APT - Age Restricted - 29 MIHU	284	
	SDP-12-038	Gatherings at Ellicott Mills	SFA, APT - Age-Restricted - 13 MIHU	127	
	SDP-13-004	Ellicott Crossing Part 2	SFA - 9 MIHU	99	
	SDP-09-039	Waverly Woods - Courtyards West - Ph. 5	SFD, SFA - Age Restricted	90	
	SDP-10-034/SDP-10-026	Villages at Turf Valley	SFA	86	
	SDP-08-032	Vantage Condominiums at Turf Valley	APT	60	
	SDP-07-054	Villas of Dunloggin	SFA - Age Restricted - 6 MIHU	51	
	SDP-10-037	Fairways at Turf Valley	SFA	47	
SDP-12-058	Long Gate Overlook	SFA - 5 MIHU	39	883	
Southeast	SDP-13-023	Walden Woods	SFD, SFA - Age Restricted - 10 MIHU	97	97
TOTAL					1,958



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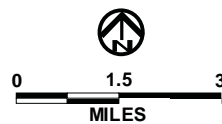


Legend

- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Projects with More Than 30 Units (12/31/12)

Source: Howard County DPZ, 2012.



Map 7 In Process Residential Site Development Plans

Residential Building Permits & Use and Occupancy Permits

The final stage of the development process is the issuance of building permits. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by the five planning areas.

Issued Building Permits

Summary of Last Year

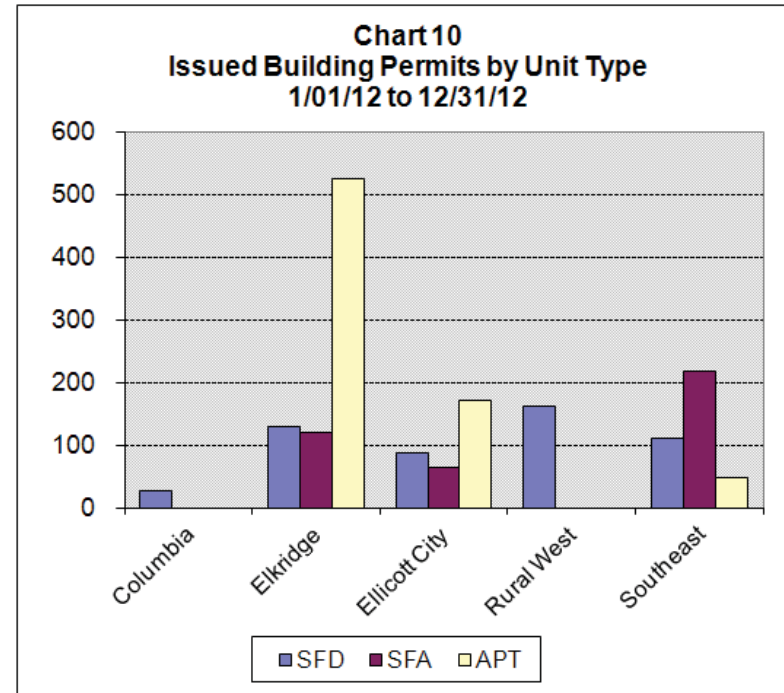
From January 1, 2012 to December 31, 2012, the County issued 1,662 residential building permits for new construction (Table 26). Elkridge had the greatest number issued with 773, followed by the Southeast with 378 and then Ellicott City with 323. Countywide, 45% of the permits were for apartment units (both rental and condo). About 31% were for single family detached units and 24% for single family attached units. Chart 10 shows these results graphically by planning area.

Table 26
Issued Residential Building Permits by Unit Type, 1/01/12 to 12/31/12

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	27	0	0	0	27	2%
Elkridge	129	119	525	0	773	47%
Ellicott City	87	65	171	0	323	19%
Rural West	161	0	0	0	161	10%
Southeast	110	217	48	3	378	23%
TOTAL	514	401	744	3	1,662	100%
PERCENT	31%	24%	45%	0%	100%	

Last Year's Projects - Greater than 20 Units

Table 27 summarizes the issued residential building permits in larger developments with more than 20 units. About 77%, or 1,279 of the total 1,662 permits issued last year, fall into this category. Map 8 shows the locations of each of the developments.



Five Year Results

Over five and a quarter years, from October 1, 2007 to December 31, 2012, a total of 7,061 residential permits have been issued in Howard County (Table 28). This is an average of 1,412 permits per year.

Of the 7,061 total permits issued over this time period, 2,334, or 33%, were for single family detached units. There were 2,255 permits (32%) for single family attached units and 2,419 permits (34%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

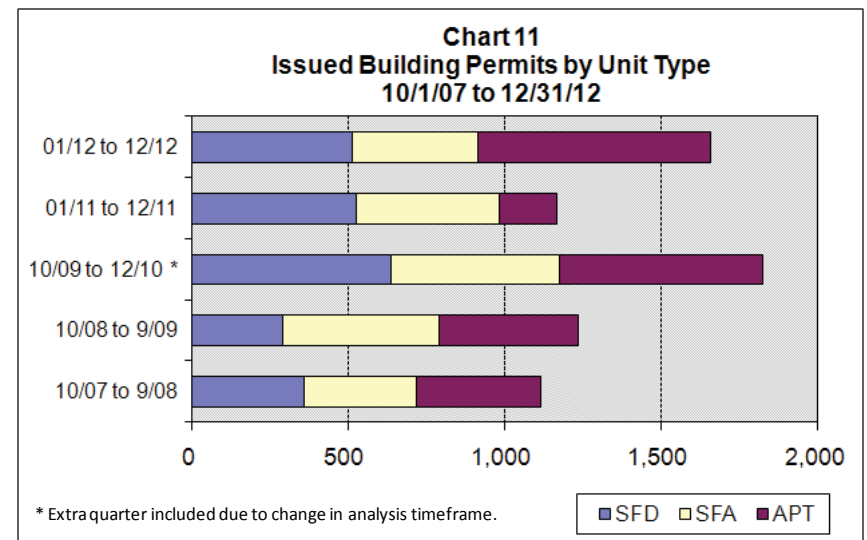
Table 27
Issued Residential Building Permits in
Subdivisions With More Than 20 Units, 1/01/12 to 12/31/12

Planning Area	Subdivision	Unit Type	Units	TOTAL
Elkridge	Howard Square	Apartments	299	694
	Blue Stream	Townhomes/Apartments	272	
	Howard Square	Single-Family Detached/Townhomes	45	
	Shipley's Grant	Townhomes	29	
	Locust Chapel	Single-Family Detached	27	
	Claremont Overlook	Single-Family Detached	22	
Ellicott City	Orchard Meadows	Apartments	144	256
	The Gatherings At Jefferson Place	Apartments-Age Restricted	27	
	Village Crest	Townhomes-Age Restricted	22	
	GTW's Waverly Woods	Single-Family Detached	21	
	GTW's Waverly Woods	Townhomes-Age Restricted	21	
	Rockland At Rogers	Single-Family Detached/Townhomes	21	
			23	
Rural West	The Warfields II	Single-Family Detached	23	
Southeast	Maple Lawn Farms	Single-Family Detached/Townhomes	127	306
	Emerson	Single-Family Detached/Townhomes	67	
	Cherrytree Park	Apartments-Age Restricted	48	
	Gabriel's Courtyard	Townhomes	37	
	Riverwalk	Townhomes	27	
			27	
TOTAL				1,279

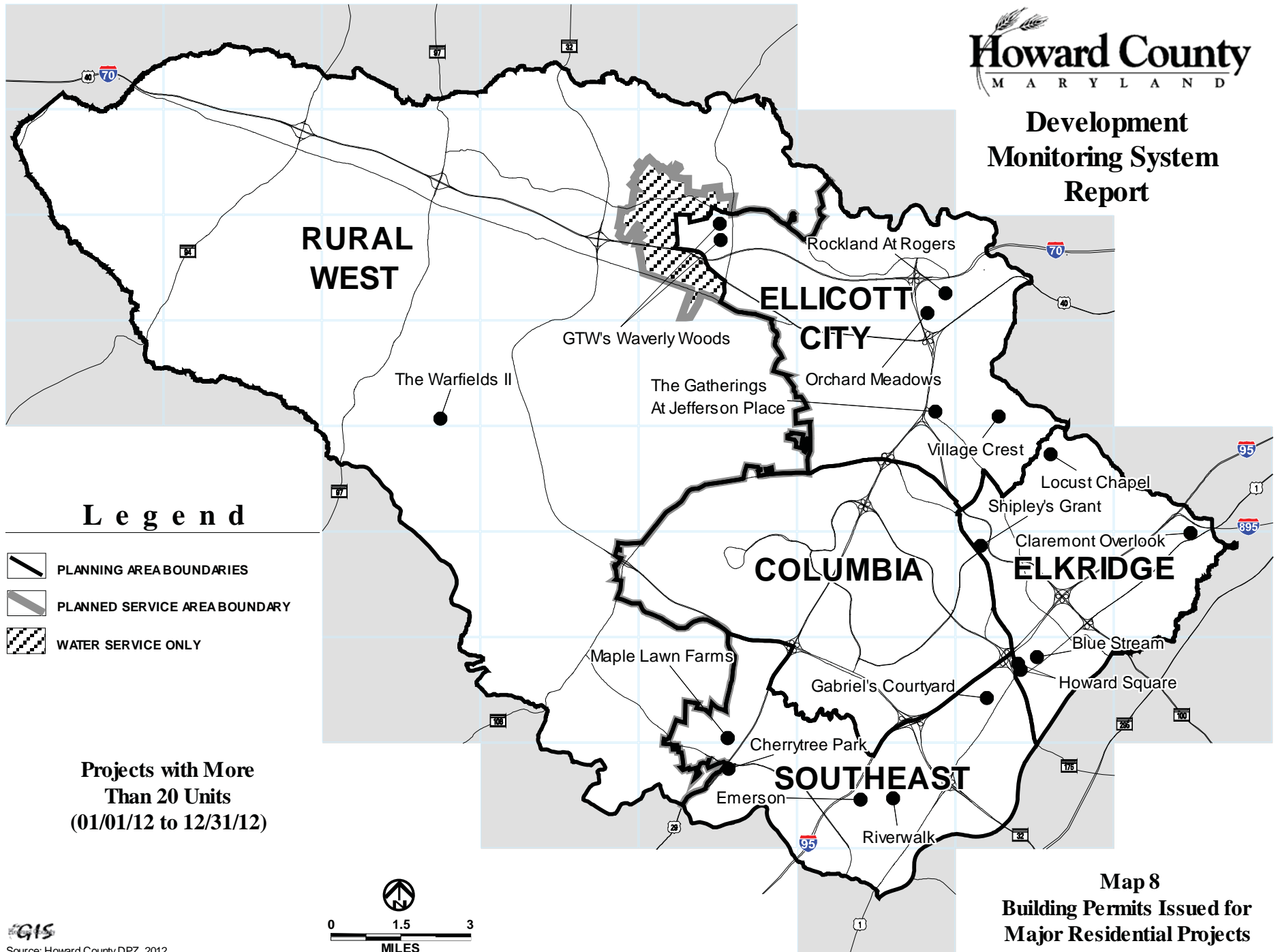
Table 28
Issued Residential Building Permits by Unit Type, 10/01/07 to 12/31/12

Year	SFD	SFA	APT	MH	Total
10/07 to 9/08	361	360	394	42	1,157
10/08 to 9/09	294	497	445	1	1,237
10/09 to 12/10 *	637	541	650	5	1,833
01/11 to 12/11	528	456	186	2	1,172
01/12 to 12/12	514	401	744	3	1,662
TOTAL	2,334	2,255	2,419	53	7,061
PERCENT	33%	32%	34%	0.8%	100%
ANNUAL AVG.	445	430	461	10	1,412




* Extra quarter included due to change in analysis timeframe



**Development
Monitoring System
Report**



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-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

**Projects with More
Than 20 Units
(01/01/12 to 12/31/12)**



**Map 8
Building Permits Issued for
Major Residential Projects**

Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2012 to December 31, 2012, the County issued 1,220 use and occupancy permits (Table 29). Of all planning areas, Ellicott City had the most with 398. This is followed by the Southeast with 331, ElkrIDGE with 256, the Rural West with 153 and Columbia with 82. Countywide, 41% of the permits were for single family detached units, 34% were for single family attached units and 25% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type, 1/01/2012 to 12/31/2012

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	37	0	45	0	82	7%
ElkrIDGE	136	120	0	0	256	21%
Ellicott City	90	67	241	0	398	33%
Rural West	153	0	0	0	153	13%
Southeast	86	229	16	0	331	27%
TOTAL	502	416	302	0	1,220	100%
PERCENT	41%	34%	25%	0%	100%	

Five Year Results

From October 1, 2007 to December 31, 2012, a total of 7,028 use and occupancy permits have been issued in Howard County (Table 30). This is an annual average of 1,339 permits per year.

Of the 7,028 total use and occupancy permits issued over the five and a quarter year total, 33% were for single family detached units, 34% for single family attached units, and 33% for apartment units. Chart 12 shows the results by unit type graphically over time.

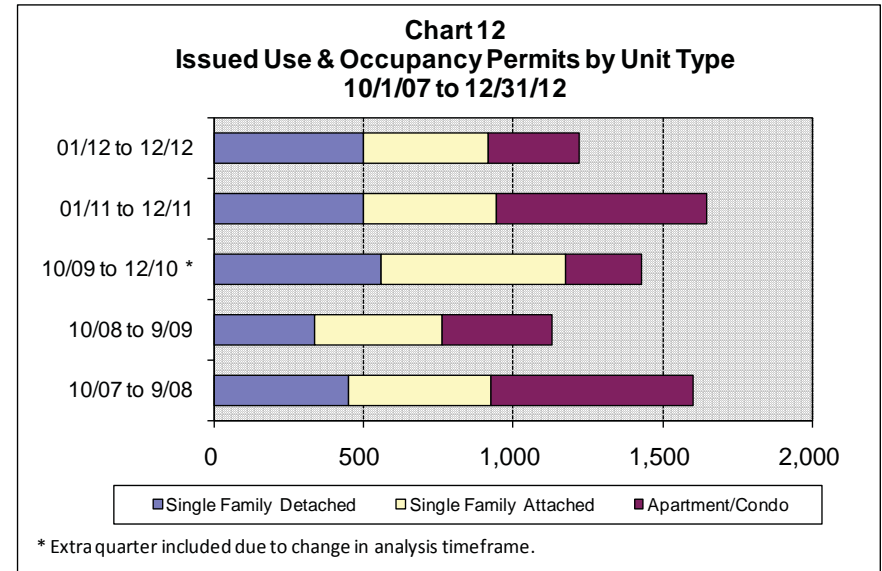


Table 30
Issued Use and Occupancy Permits by Unit Type, 10/07 to 12/12

Year	SFD	SFA	APT	MH	Total
10/07 to 9/08	452	475	675	0	1,602
10/08 to 9/09	337	427	368	0	1,132
10/09 to 12/10 *	558	616	253	0	1,427
01/11 to 12/11	501	441	705	0	1,647
01/12 to 12/12	502	416	302	0	1,220
TOTAL	2,350	2,375	2,303	0	7,028
PERCENT	33%	34%	33%	0%	100%
ANNUAL AVG.	448	452	439	0	1,339

* Extra quarter included due to change in analysis timeframe.

Age-Restricted and Moderate Income Housing Units

In response to policies initially established with the 2000 General Plan, legislation has been adopted to foster the development of age-restricted and moderate income housing units (MIHU).

Age-restricted housing can be built as a conditional use in residential zoning districts as well as by-right in the Planned Office Research (POR), Planned Senior Community (PSC), Community Center Transition (CCT) and Residential: Senior-Institutional (RSI) districts.

The 2004 comprehensive rezoning expanded the MIHU regulations to include more zoning districts. New projects in higher density and mixed use zones as well as all age-restricted projects must build a certain percentage of affordable units, anywhere from 5% to 15%, depending on particular criteria such as the zone, unit type and density.

The following summarizes recent development activity of age-restricted and MIHU units from January 1, 2012 to December 31, 2012, as well as some comparisons to the previous year reporting period.

In-Process Plans

Table 31 shows the age-restricted units from in-process plans by unit type and by planning area as of December 31, 2012. This includes both subdivision and site development plans. There were 669 units in process, most of which are in Ellicott City and a smaller number in Columbia. The timing of actual development will be paced by APFO.

Countywide there were 349 apartments (including rental and condo), 190 SFA units and 130 SFD age-restricted units in process. Map 9 shows location and names of the particular projects. Table 37 shows the details of each of these projects.

Compared to last year, there are less age-restricted units in process in this current reporting period, 689 units versus 669, respectively.

Table 31
Age Restricted Units from Plans in Process, 12/31/2012
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	20	20	3%
Elkridge	0	0	0	0	0%
Ellicott City	120	103	329	552	83%
Rural West	0	0	0	0	0%
Southeast	10	87	0	97	14%
TOTAL	130	190	349	669	100%
PERCENT	19%	28%	52%	100%	
As of 12/31/11	93	184	412	689	

Table 32 shows the total MIHU units in process. These total 784, the majority of which are in Elkridge. This is less than the number in process the previous year which had 881.

Table 32
MIHU Units from Plans in Process, 12/31/2012
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	51	511	562	72%
Ellicott City	0	20	42	62	8%
Rural West	0	0	0	0	0%
Southeast	0	10	150	160	20%
TOTAL	0	81	703	784	100%
PERCENT	0%	10%	90%	100%	
As of 12/31/11	0	149	732	881	

Table 33 shows just the age-restricted MIHU units in process, 58 of the 784 MIHU unit total. The remaining 726 units are MIHU units that are not age-restricted. There were 47 age-restricted MIHU units in process for the previous reporting period.

Map 10 shows the particular projects that include MIHU units. Table 37 shows the details of each of these projects.

Table 33
Age-Res. MIHU Units from Plans in Process, 12/31/2012
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	6	42	48	83%
Rural West	0	0	0	0	0%
Southeast	0	10	0	10	17%
TOTAL	0	16	42	58	100%
PERCENT	0%	28%	72%	100%	
As of 12/31/11	0	6	41	47	

Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2012 and December 31, 2012. There were a total of 132 units approved. This is more than the 58 units approved during the previous reporting period. The 132 units include 32 apartment units in Ellicott Mills Overlook and 49 SFA units and 51 SFD units in the Courtyards of Waverly Woods West. Map 9 shows the approved age-restricted projects during this time period. Table 38 shows the details for each of the plans (including MIHU's).

Table 35 shows the MIHU units in approved site development plans. A total of 79 units were approved – 23 in Ellicott City, 51 in Elkridge and 5 in Columbia. None of these units were age-restricted - shown in Table 36. Map 10 shows the approved projects with MIHU units and Table 38 shows the plan details.

Table 34
Age Restricted Units from Approved Plans, 1/01/2012 to 12/31/2012
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	51	49	32	132	100%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	51	49	32	132	100%
PERCENT	39%	37%	24%	100%	
1/01/2011 to 12/31/2011	0	30	28	58	

Table 36
Age-Res. MIHU Units from Approved Plans, 1/01/12 to 12/31/12
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	
1/01/2011 to 12/31/2011	0	0	0	0	

Table 35
MIHU Units from Approved Plans, 1/01/12 to 12/31/12
(with comparisons to the previous reporting period)

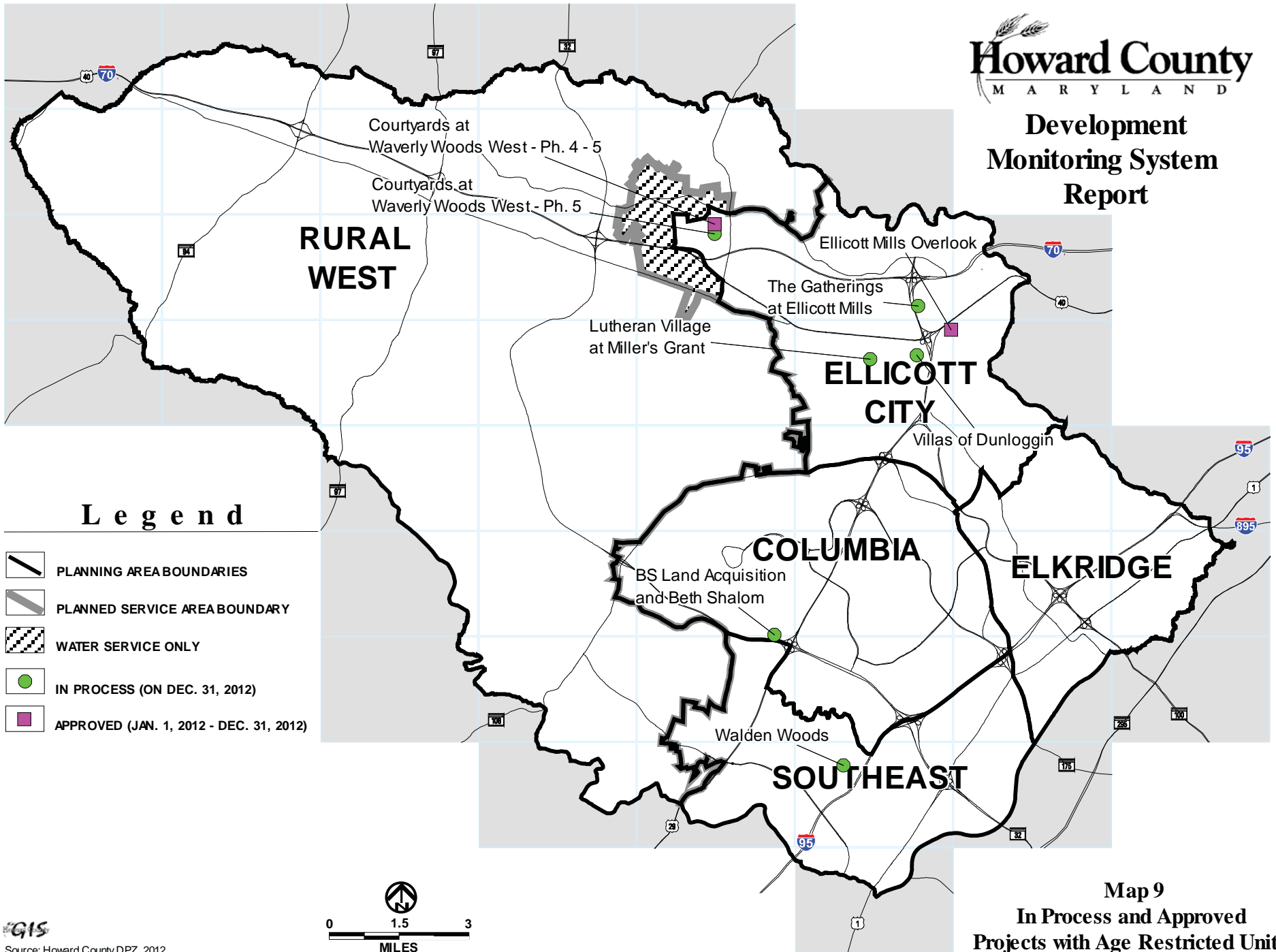
Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	5	0	5	6%
Elkridge	0	51	0	51	65%
Ellicott City	0	8	15	23	29%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	64	15	79	100%
PERCENT	0%	81%	19%	100%	
1/01/2011 to 12/31/2011	10	8	33	51	

**Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2012**

Plan Name	File Number	Zoning	MIHU Units											Market Rate Age Restricted Units				
			Not Age Restricted				Age Restricted				Total MIHU			SFD	SFA	APT	Total	
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT					Total
Howard Square - Remaining Phs.	S-06-010	CAC	0	0	129	129	0	0	0	0	0	0	129	129	0	0	0	0
The Overlook at Bluestream - Remaining Phs.	S-06-018	CAC	0	7	171	178	0	0	0	0	0	7	171	178	0	0	0	0
Village Towns	S-10-001	R-MH	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0
Morris Place	S-10-002	CAC	0	28	0	28	0	0	0	0	0	28	0	28	0	0	0	0
Laurel Park Station	S-10-004	CAC, TOD	0	0	150	150	0	0	0	0	0	0	150	150	0	0	0	0
Oxford Square	S-11-001	TOD	0	0	143	143	0	0	0	0	0	0	143	143	0	0	0	0
Buch Property	SDP-12-001	CAC	0	2	1	3	0	0	0	0	0	2	1	3	0	0	0	0
Deep Falls	SDP-13-029	R-MH	0	0	55	55	0	0	0	0	0	0	55	55	0	0	0	0
Shipleys Grant - Ph. 5 and 6	SDP-12-061	R-A-15	0	4	0	4	0	0	0	0	0	4	0	4	0	0	0	0
Ellicott Crossing - Part 2	SDP-13-004	POR-MXD-6	0	9	0	9	0	0	0	0	0	9	0	9	0	0	0	0
Fox Hunt Estates	SDP-07-007	R-SA-8	0	4	0	4	0	0	0	0	0	4	0	4	0	0	0	0
Long Gate Overlook	SDP-12-058	R-SA-8	0	5	0	5	0	0	0	0	0	5	0	5	0	0	0	0
Villas of Dunloggin	SDP-07-054	R-SC	0	0	0	0	0	6	0	6	0	6	0	6	0	45	0	45
Lutheran Village at Miller's Grant	SDP-08-075	PSC	0	0	0	0	0	0	29	29	0	0	29	29	36	0	219	255
BS Land Acquisition and Beth Shalom	SDP-08-083	R-20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	20
Riverwatch	SDP-08-109	CAC	0	0	12	12	0	0	0	0	0	0	12	12	0	0	0	0
Courtyards at Waverly Woods West - Ph. 5	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	84	6	0	90
The Gatherings at Ellicott Mills	SDP-12-038	CAC	0	0	0	0	0	0	13	13	0	0	13	13	0	46	68	114
Walden Woods	SDP-13-023	PSC	0	0	0	0	0	10	0	10	0	10	0	10	10	77	0	87
TOTAL			0	65	661	726	0	16	42	58	0	81	703	784	130	174	307	611



Development Monitoring System Report



Legend

- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY
- IN PROCESS (ON DEC. 31, 2012)
- APPROVED (JAN. 1, 2012 - DEC. 31, 2012)



Source: Howard County DPZ, 2012.



Map 9
In Process and Approved
Projects with Age Restricted Units

Table 38
Approved SDP's with MIHU and Age Restricted Units - January 1, 2012 to December 31, 2012

Plan Name	File Number	Zoning	MIHU Units												Market Rate				
			Not Age Restricted				Age Restricted				Total MIHU				Age Restricted Units				
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	
Simpson Mill	SDP-12-015	R-SA-8	0	5	0	5	0	0	0	0	0	5	0	0	0	0	0	0	0
Howard Square	SDP-11-043	CAC	0	14	0	14	0	0	0	0	0	14	0	0	0	0	0	0	0
Howard Square	SDP-11-054	CAC	0	13	0	13	0	0	0	0	0	13	0	0	0	0	0	0	0
Courtyards at Waverly Woods West - Ph. 4	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	51	49
Dorset Gardens (Bluestream)	SDP-11-040	R-SA-8	0	24	0	24	0	0	0	0	0	24	0	0	0	0	0	0	0
Orchard Meadows	SDP-11-052	R-A-15	0	0	15	15	0	0	0	0	0	0	15	0	0	0	0	0	0
Ellicott Mills Overlook - Part 1	SDP-11-057	POR-MXD-6	0	8	0	8	0	0	0	0	0	8	0	0	32	32	0	0	0
TOTAL			0	64	15	79	0	0	0	0	0	64	15	79	51	49	32	132	

Number of Plans

Tables 39 through 41 show the number of plans that have age-restricted and MIHU units. Both plan in process and approved site development plans are shown. Between January 1, 2012 and December 31, 2012 there were 2 site plans approved with age-restricted units and 6 site plans approved with MIHU units. No age-restricted MIHU plans were approved.

On December 31, 2012 there were 6 plans in process that included age-restricted units and 17 plans with MIHU units. Four in process plans were age-restricted MIHU plans.

Table 39
Number of Plans with Age-Res. Units
1/01/12 to 12/31/2012

Planning Area	Plans	
	In Process (1)	Approved Plans
Downtown Columbia	0	0
All Other Columbia	1	0
Elkridge	0	0
Ellicott City	4	2
Rural West	0	0
Southeast	1	0
TOTAL	6	2

(1) In Process on Dec. 31, 2012

Table 40
Number of Plans with MIHU Units
1/01/12 to 12/31/2012

Planning Area	Plans	
	In Process (1)	Approved Plans
Downtown Columbia	0	0
All Other Columbia	0	1
Elkridge	10	3
Ellicott City	5	2
Rural West	0	0
Southeast	2	0
TOTAL	17	6

(1) In Process on Dec. 31, 2012

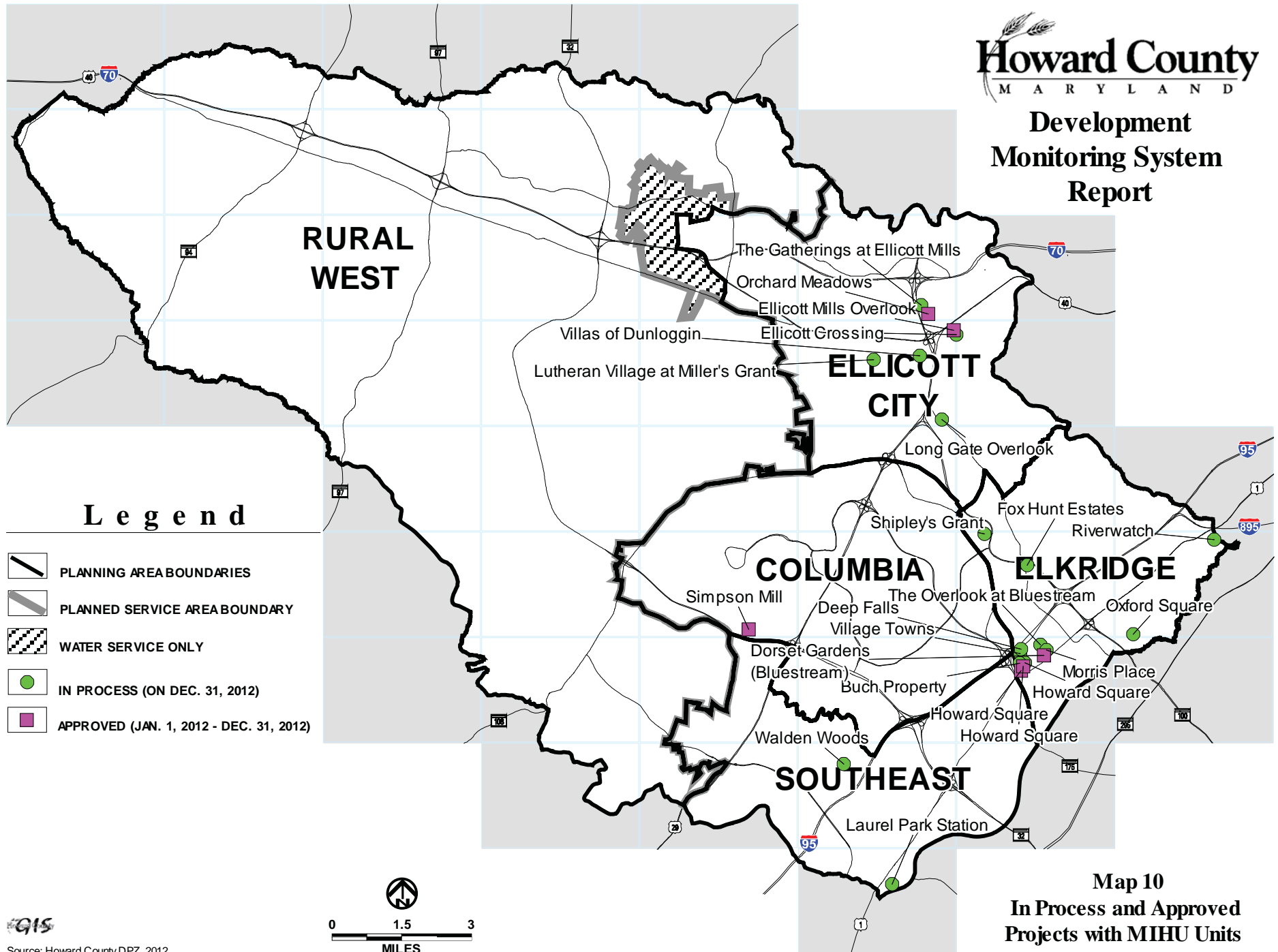
Table 41
Number of Plans with Age-Res. MIHU Units
1/01/12 to 12/31/2012

Planning Area	Plans	
	In Process (1)	Approved Plans
Downtown Columbia	0	0
All Other Columbia	0	0
Elkridge	0	0
Ellicott City	3	0
Rural West	0	0
Southeast	1	0
TOTAL	4	0

(1) In Process on Dec. 31, 2012



**Development
Monitoring System
Report**

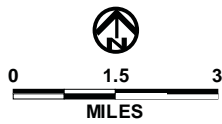


Legend

- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY
- IN PROCESS (ON DEC. 31, 2012)
- APPROVED (JAN. 1, 2012 - DEC. 31, 2012)



Source: Howard County DPZ, 2012.



**Map 10
In Process and Approved
Projects with MIHU Units**

Use & Occupancy Permits

Table 42 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2012 and December 31, 2012 211 age-restricted units were built, 17% of the total 1,220 housing units built in the County over this latest reporting period.

There were slightly less age-restricted units built in the current reporting period compared to the previous period when there were 234 units built.

Since the 2004/2005 DMS, which was the first time age-restricted units were reported soon after recently passed regulatory changes enabling these type of units, 23% of all new homes built in Howard County have been age-restricted. This is summarized in Table 43.

Table 42
Age Restricted Units Built, 1/01/12 to 12/31/12
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	9	0	45	54	26%
Elkridge	0	0	0	0	0%
Ellicott City	25	61	54	140	66%
Rural West	0	0	0	0	0%
Southeast	0	1	16	17	8%
TOTAL	34	62	115	211	100%
PERCENT	16%	29%	55%	100%	

1/01/11 to 12/31/11	6	46	182	234	
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Table 43
Age Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/12

Planning Area	SFD	SFA	APT	TOTAL	Total All Units Built	Age-Restricted % of Total
10/04 to 9/05	22	171	291	484	1,650	29%
10/05 to 9/06	35	233	369	637	1,877	34%
10/06 to 9/07	10	168	196	374	1,202	31%
10/07 to 9/08	7	105	130	242	1,602	15%
10/08 to 9/09	0	75	171	246	1,132	22%
10/09 to 12/10 *	0	132	118	250	1,427	18%
01/11 to 12/11	6	46	182	234	1,647	14%
01/12 to 12/12	34	62	115	211	1,220	17%
TOTAL	114	992	1,572	2,678	11,757	23%
PERCENT	4%	37%	59%	100%		

* Extra quarter included due to change in analysis timeframe.

Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from January 1, 2012 to December 31, 2012, have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 44). The data is graphically represented in Charts 13, 14, and 15.

Home sales prices in Howard County have remained about the same last year compared to the previous reporting period with a median sales price of \$380,000 for both years. Prices had steadily declined from their peak \$400,000 median sales price in 2005/2006 for all housing types combined to a median of \$350,000 in 2008/2009 and again in 2009/2010. Two years

ago, however, the median sales price for all housing types combined increased by 8.6% to \$380,000 and have remained at this level in 2012. The mean sales price decreased slightly last year to \$411,911 from \$416,143, a 1% decline. Whereas single family detached and attached home prices decreased slightly last year, condos prices, however, increased by 2.2% (mean) and 2.9% (median).

Prices began declining in 2006/2007, which was the first time prices had fallen for at least 15 years. Price declines accelerated thereafter, but have since increased once again beginning in 2011. From the peak in 05/06, however, median prices for single family detached units are down 17.8%. The median for SFA or townhouse units are down by 12.0% and condos are down by a much larger 27%.

Table 44
Housing Sales by Type, 10/01/07 to 12/31/12

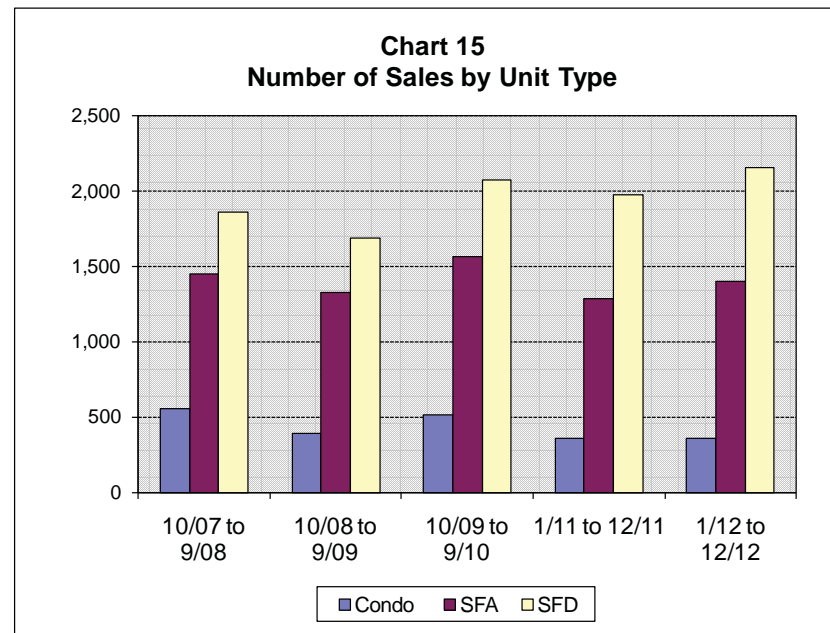
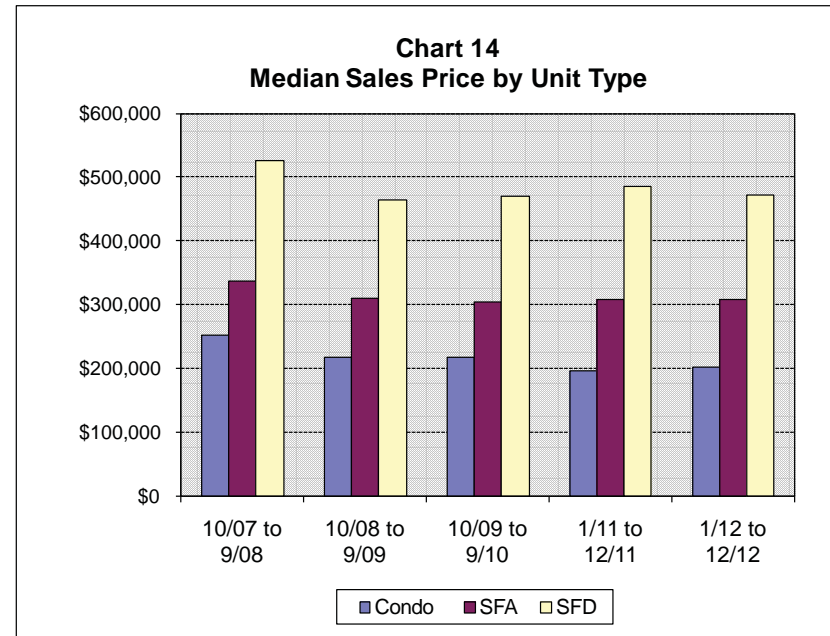
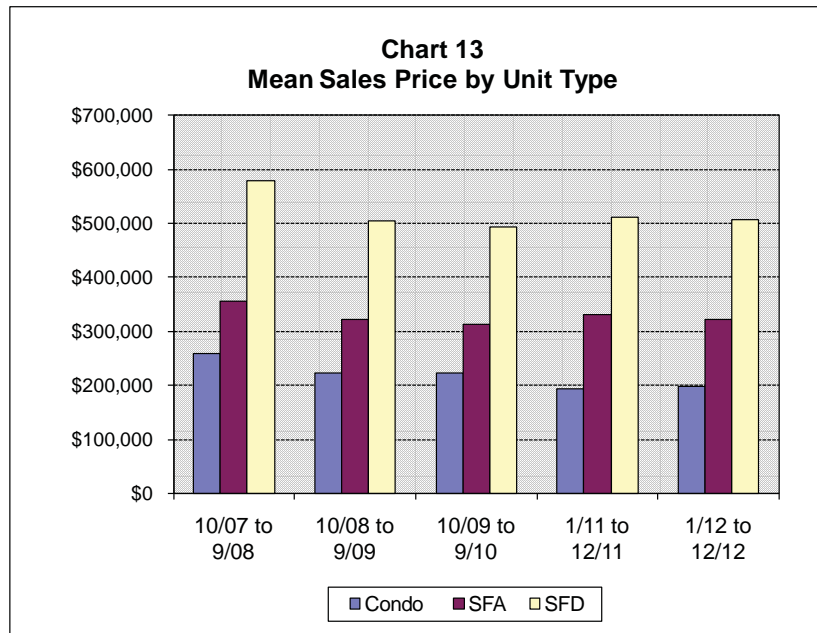
10/07 to 9/08				10/08 to 9/09			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	552	\$258,172	\$252,152	Condo	391	\$222,730	\$218,000
MH	6	\$124,900	\$126,250	MH	3	\$115,000	\$114,500
SFA	1,450	\$356,582	\$337,000	SFA	1,324	\$321,505	\$310,000
SFD	1,856	\$578,952	\$525,000	SFD	1,685	\$504,788	\$463,250
TOTAL	3,864	\$448,975	\$380,000	TOTAL	3,403	\$400,726	\$350,000

10/09 to 9/10				1/11 to 12/11			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	512	\$222,211	\$217,500	Condo	355	\$194,247	\$196,365
MH	1	\$90,000	\$90,000	MH	0	\$0	\$0
SFA	1,565	\$313,832	\$305,000	SFA	1,283	\$330,800	\$308,000
SFD	2,072	\$494,261	\$470,000	SFD	1,972	\$511,613	\$485,000
TOTAL	4,150	\$392,558	\$350,000	TOTAL	3,610	\$416,143	\$380,000

1/12 to 12/12			
Unit Type	# of Sales	Mean	Median
Condo	358	\$198,496	\$202,000
MH	3	\$146,633	\$175,000
SFA	1,396	\$322,141	\$307,565
SFD	2,154	\$506,075	\$472,500
TOTAL	3,911	\$411,991	\$380,000

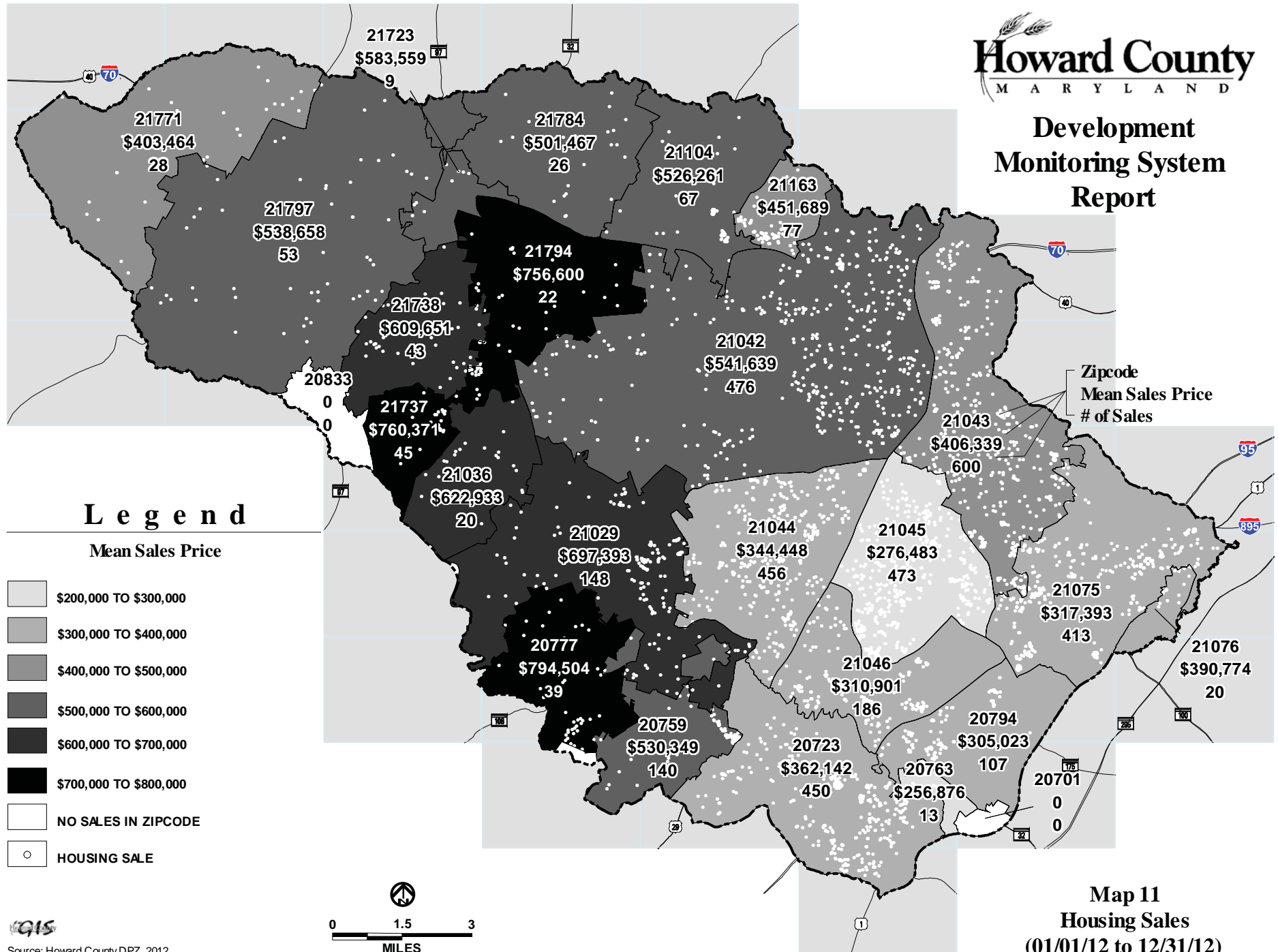
Source: Howard County DPZ analysis of housing sales data from SDAT

The total number of home sales increased last year with a total of 3,911 sales. This is an increase from 3,610 sales reported in the previous reporting period, but less than the year before when 4,150 homes were sold. Chart 15 depicts these numbers by unit type. Sales last year by zip code are shown on Map 11.





Development Monitoring System Report



Legend

Mean Sales Price

- \$200,000 TO \$300,000
- \$300,000 TO \$400,000
- \$400,000 TO \$500,000
- \$500,000 TO \$600,000
- \$600,000 TO \$700,000
- \$700,000 TO \$800,000
- NO SALES IN ZIPCODE
- HOUSING SALE



Source: Howard County DPZ, 2012.



Map 11
Housing Sales
(01/01/12 to 12/31/12)

Land Preservation

Agricultural Land Preservation Program

Howard County’s Agricultural Land Preservation Program (ALPP) has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the purchase of easements where a farmer can voluntarily choose to sell a perpetual easement to the County while holding fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

Agricultural land preservation in the County first began in 1979 using the State’s easement purchase program, known as the Maryland Agricultural Land Preservation Foundation (MALPF). The County instituted its own easement purchase program, indicated above, in 1984 and until 1988 both the State and County programs were active in preserving farmland. In 1989 the County initiated the innovative Installment Purchase Agreement (IPA) program to purchase easements. The IPA program has been very successful attracting many new farmers to the County program, though interest in MALPF waned during this time.

The County’s IPA program reached its initial \$55 million authorization limit in Fiscal Year 1997 and the program was temporarily suspended until spring 2000 when the County Council authorized an additional \$15 million in IPA commitments. In June 2002, the County purchased easements on 400.5 acres at a price of \$2.48 million. Subsequent to these purchases, there were no additional acquisitions for several years despite two increases in the maximum offer amount.

In an effort to make easement sales even more attractive to farmers, in April 2006 the maximum purchase price was further increased to \$40,000 per acre. A new application period, known as “Batch 13,” occurred during the fall of 2006. This batch brought in three applicant properties totaling 253 acres. The ALPP subsequently acquired easements on all three farms between 2007 and 2009.

Building on that success, in the spring of 2009 the County Executive announced the opening of “Batch 14”, which attracted 13 high quality applications. All but two of the properties were over 50 acres and most were within one mile of over 1,000 acres of land already preserved. Batch 14

was a competitive application cycle, meaning there wasn’t enough funding to acquire easements on all of the applicant properties. Offers were made on the top seven scoring farms in early December 2009. Of those seven properties, two applicants turned down the ALPP offers, so the ALPP extended offers on the next two properties on the list in the summer of 2010. These two properties accepted their offers.

Of the seven total property owners who accepted their ALPP offers, settlement occurred on four of the farms during 2010. The remaining three properties settled in 2011. There are now 14,631 total acres that have been preserved through the County purchase program.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/ CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992. During the current reporting period, calendar year 2012, no properties were preserved with an agricultural easement through the development process.

As of December 31, 2012, there were 21,590 acres of permanently preserved agricultural land. This includes 14,631 acres of purchased easements through the County’s program, 4,030 acres of easements purchased by the State and 2,929 preservation acres dedicated as part of the land development process (Table 45).

Table 45
Agricultural Preservation Easements, December 31, 2012

Type	Acres	Percent
County Purchased Agric. Easements	14,631	68%
State Purchased Agric. Easements	4,030	19%
Dedicated Agric. Preservation Parcels	2,929	14%
TOTAL	21,590	100%

Other Rural Easement Dedication

As previously indicated, last year no acres were preserved through the development process and enrolled in the Agricultural Land Preservation Program. The total acres of land dedicated in this manner through 2012 therefore remain at 2,929.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 127 acres of land in 14 parcels were dedicated as joint Howard County/Homeowner's Association preservation parcels. Table 46 shows the land preservation totals from dedicated easements through then end of 2012 for all easement types.

Since 1992, preservation easements on 10,804 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 6,024 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 2,929 acres are held by the Howard County Agricultural Land Preservation Program. A total of 971 acres are jointly held by the Howard County Conservancy and Howard County and 349 acres are jointly held by Howard County and the Patuxent Conservation Corps. The remaining acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society as well as other holders.

Table 46 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 14,946 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,142 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 10,804 acres, is land in dedicated preservation easements as described earlier. Of the 4,142 acres for residential development, about 673 acres are not yet developed (built on), 3,058 acres are developed (built on) and 411 acres are for roads.

Preservation easements in the Rural West discussed above total 29,465 acres. This includes all 21,590 acres of agricultural preservation easements and 7,875 acres of environmental preservation parcels dedicated through the subdivision process. This represents about 31% of the approximate 94,660 total acres of land in the Rural West.

Table 46
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	378	458	
Undeveloped Lots (From Density Transfer)	199	215	
Total Undeveloped Lots	577	673	
Developed Lots (By Right)	1,858	2,090	
Developed Lots (From Density Transfer)	913	968	
Total Developed Lots	2,771	3,058	
Roadway		411	
TOTAL	3,348	4,142	27.7%

Preservation	Parcels	Acres	
Agricultural Preservation	85	2,929	
Howard County/Homeowner's Association	554	6,024	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	28	971	
Howard County/Patuxent Conservation Corps. Inc.	15	349	
Other	90	401	
Total Preservation	777	10,804	72.3%

GRAND TOTAL (Includes Res. Develop.)	4,125	14,946	100.0%
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Total Preserved Land in the Rural West

Including County and State parks (8,063 acres), WSSC land (2,466 acres), permanent historic easements (101 acres) and other environmental easements (1,118 acres) the total preserved land amounts to 41,213 acres, about 44% of all land in the Rural West.

Map 12 shows the preserved land as of December 31, 2012 including acquired (purchased) agricultural easements, dedicated agricultural and environmental preserved parcels, other environmental easements, as well as WSSC, County and State park land.

Neighborhood Preservation in the East

The Howard County Zoning regulations were amended effective on September 9, 2008 to allow neighborhood preservation parcels in eastern Howard County. Similar to preservation in the Rural West, neighborhood preservation parcels are created in the east by transferring density rights from a sending parcel, which is permanently preserved, to a receiving parcel at additional density. For each transaction, sending and receiving parcels have to be in the same planning area in the eastern portion of the County.

For the current reporting period covering calendar year 2012 there was one subdivision utilizing this option. Table 47 shows the aggregate results since the beginning of this program. A total of 5 neighborhood preservation parcels have been created totaling 8.8 acres. The easement holder for all of these acres is Howard County. Through this process, additional density was created for 4 additional single family detached homes and 6 additional townhomes on a total of about 1.4 acres. These additional units are part of receiving subdivisions that total 209 housing units on 96.9 acres. Thus far through the end of 2012, 138 of these 209 units are built. It should be noted that 53.9 of the 96.9 acres are open space acres as normally required by the zoning and subdivision regulations.

Total Preservation Easements in the East

In addition to neighborhood preservation parcels in the east, there are also 194 permanent historic easements, 316 Maryland Environmental Trust and 112 other land trust conservation easements. Total preservation easements in the east therefore amount to 631 acres. This is summarized in Table 48.

Total Preserved Land in the East

Including County and State parks (10,226 acres), WSSC land (677 acres) and Columbia Association open space (3,684 acres) the total preserved land amounts to 15,218 acres, about 23% of all land in the east. Map 12 shows the locations of the preserved land by the various types.

Table 47
Neighborhood Preservation

Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Undeveloped Lots (By Right)	70	0	0	70	11.0
Undeveloped Lots (From Density Transfer)	1	0	0	1	0.2
Total Undeveloped Lots	71	0	0	71	11.2
Developed Lots (By Right)	69	60	0	129	23.6
Developed Lots (From Density Transfer)	3	6	0	9	1.2
Total Developed Lots	72	66	0	138	24.8
Open Space					53.9
Roadway					6.1
Other					0.9
Total	143	66	0	209	96.9 91.7%

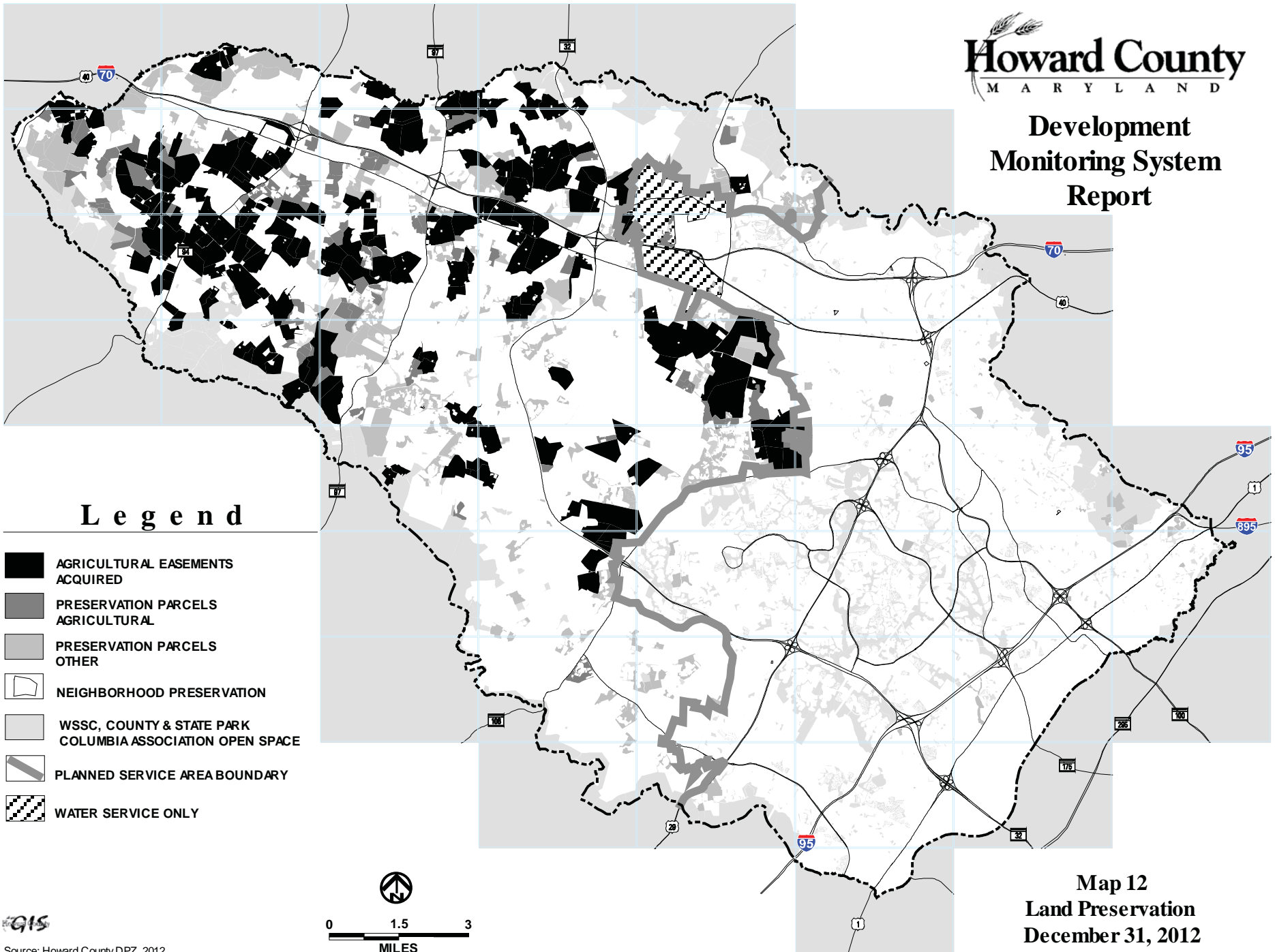
East Preserved Land - Sending Parcels Easement Holder	Preservation Parcels	Acres
Howard County Government	5	8.8
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Total Preservation	5	8.8 8.3%
GRAND TOTAL		105.7 100.0%

Table 48
East Preservation Easements, December 31, 2012

Type	Acres	Percent
Neighborhood Preservation	9	100%
Permanent Historic Easements	194	31%
Maryland Environmental Trust Easements	316	51%
Land Trust Conservation Easements	112	18%
Total Other Easements	622	100%
TOTAL EAST PRESERVATION	631	



Development Monitoring System Report



Map 12
Land Preservation
December 31, 2012



Source: Howard County DPZ, 2012.



Non-Residential Development

Non-Residential Subdivisions

For this report, non-residential development is also tabulated by Planning Area. The number of non-residential plans, lots created, and acres of plans recorded and in-process have been compiled for each of these areas and are discussed below. The analysis includes last year’s subdivision activity as well as total activity including the previous five years.

Recorded Plans

For the latest reporting period there were 4 non-residential lots recorded countywide in 22 subdivision plans totaling 432 acres (Table 49). It should be noted that many of these are resubdivisions that do not create new lots, but simply create roadway or easements. Some are parcel consolidations where the net number of lots actually get reduced.

Table 49
Recorded Non-Residential Subdivisions, 01/01/2012 to 12/31/2012

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	(1)	-25%	8	36%	125	29%
Elkridge	0	0%	2	9%	154	36%
Ellicott City	3	75%	5	23%	53	12%
Rural West	0	0%	0	0%	0	0%
Southeast	2	50%	7	32%	100	23%
TOTAL	4	100%	22	100%	432	100%

Table 50 shows the recorded non-residential subdivisions from October 1, 2007 to December 31, 2012. Over this five year period there were 32 non-residential lots recorded countywide in 114 subdivision plans totaling 2,137 acres. This amounts to an annual average over the analysis time period of 6 lots in 22 plans encompassing 407 acres.

Table 50
Recorded Non-Residential Subdivisions, 10/01/07 to 12/31/12

Countywide	Lots	Plans	Acreage
10/07 to 09/08	14	36	477
10/08 to 09/09	3	18	371
10/09 to 12/10 *	5	26	647
01/11 to 12/11	6	12	210
01/12 to 12/12	4	22	432
TOTAL	32	114	2,137
ANNUAL AVG.	6	22	407

* Extra quarter included due to change in analysis timeframe

In-Process Plans

Countywide, there were 26 non-residential subdivision plans in process as of December 31, 2012. This compares to 30 plans in process for the previous reporting period (Table 51). Eight plans were in Columbia, five plans each were in Ellicott City and Downtown Columbia, four plans each were in Elkridge and the Southeast. Most of the plans were in the final plan or environmental concept plan stage.

Table 52 shows the number of potential non-residential lots in process. As of December 31, 2012, there were 10 lots in process, compared to 8 in process on December 31, 2011. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 240 non-residential acres in the subdivision process as of December 31, 2012 (Table 53). This compares to 479 acres in process one year earlier. For the current year the greatest acreage amount is in the Elkridge (85 acres). This is followed by Ellicott City with 63 acres, Downtown Columbia with 45 acres, 29 acres in the Southeast, and 17 acres in Columbia.

Table 51
Number of Non-Residential Plans in Process, 12/31/2012
with Comparisons to 12/31/2011 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	1	0	0	0	4	5
All Other Columbia	6	0	1	0	1	8
Elkridge	0	1	0	0	3	4
Ellicott City	2	0	0	0	3	5
Rural West	0	0	0	0	0	0
Southeast	2	0	0	1	1	4
TOTAL	11	1	1	1	12	26
12/31/11 Total	10	2	1	1	16	30

Table 52
Non-Residential Lots from Subdivision Plans in Process, 12/31/2012
with Comparisons to 12/31/2011 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	7	7
All Other Columbia	0	3	0	(1)	2
Elkridge	1	0	0	(2)	(1)
Ellicott City	0	0	0	0	0
Rural West	0	0	0	0	0
Southeast	0	0	2	0	2
TOTAL	1	3	2	4	10
12/31/11 Total	2	2	2	2	8

Table 53
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2012
with Comparisons to 12/31/2011 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	45	45
All Other Columbia	0	10	0	7	17
Elkridge	17	0	0	68	85
Ellicott City	0	0	0	63	63
Rural West	0	0	0	0	0
Southeast	0	0	15	15	29
TOTAL	17	10	15	198	240
12/31/11 Total	44	13	15	408	479

Approved Non-Residential Site Development Plans

The site development plan (SDP) process follows lot creation and is a better gauge of non-residential development activity than subdivision. Once a SDP is approved, construction permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by Planning Area. The number of non-residential site development plans approved, the building square footage, and the acreage of approved plans have been compiled for each Planning Area. The analysis includes last year's site development plan activity as well as activity for the previous four reporting periods.

Summary of Last Year

For the latest reporting period 794,171 square feet were approved in 16 site development plans on 191 acres (Table 54). The greatest amount of square footage approved was in Elkrigde, followed by the Southeast and Columbia. Ellicott City had a smaller amount approved.

Table 55 shows the approved square footage by building type. About 446,000 square feet, 56% of the total, are for office/service uses, most all of which is in the Southeast. About 188,000 square feet, 24% of the total, are for manufacturing/extensive industrial uses. Retail uses account for about 10,000 square feet, and government and institutional uses account for 136,000 square feet. Chart 16 shows this breakdown graphically.

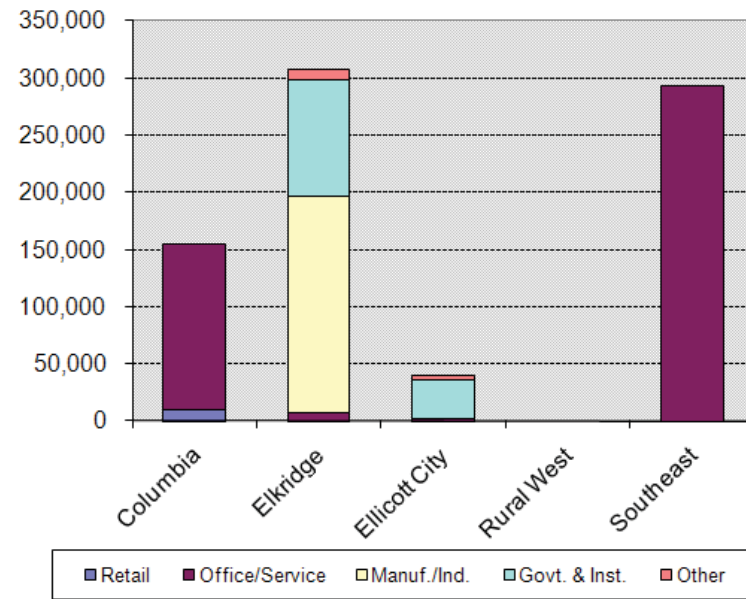
Table 54
Approved Non-Residential Site Development Plans, 1/1/12 to 12/31/12

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	154,180	19%	3	19%	16	9%
Elkrigde	307,635	39%	4	25%	64	34%
Ellicott City	39,481	5%	4	25%	32	17%
Rural West	0	0%	1	6%	53	28%
Southeast	292,875	37%	4	25%	26	14%
TOTAL	794,171	100%	16	100%	191	100%

Table 55
Building Square Feet in Approved Site Development Plans
1/1/12 to 12/31/12

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	10,180	144,000	0	0	0	154,180
Elkrigde	0	7,500	188,527	102,028	9,580	307,635
Ellicott City	0	1,753	0	34,278	3,450	39,481
Rural West	0	0	0	0	0	0
Southeast	0	292,875	0	0	0	292,875
TOTAL	10,180	446,128	188,527	136,306	13,030	794,171
PERCENT	1.3%	56.2%	23.7%	17.2%	1.6%	100.0%

Chart 16
Sq. Ft. in Approved Site Development Plans
1/1/12 to 12/31/12



Last Year's Projects - Greater than 30,000 Square Feet

Of the 794,171 square feet of non-residential building space approved in site development plans last year, about 587,000 square feet, 74% of the total, were in plans with more than 30,000 square feet. These larger plans are shown in Table 56. The locations of these plans are shown on Map 13.

In Columbia, two large plans were approved last year - an office building in Grace Tech Park and an office building in Waterloo Crossing. In Elkridge, two large plans were approved - a warehouse/office building in the Dorsey Run Industrial Center and the new Ducketts Lane Elementary School. In the Southeast also two large office buildings were approved,

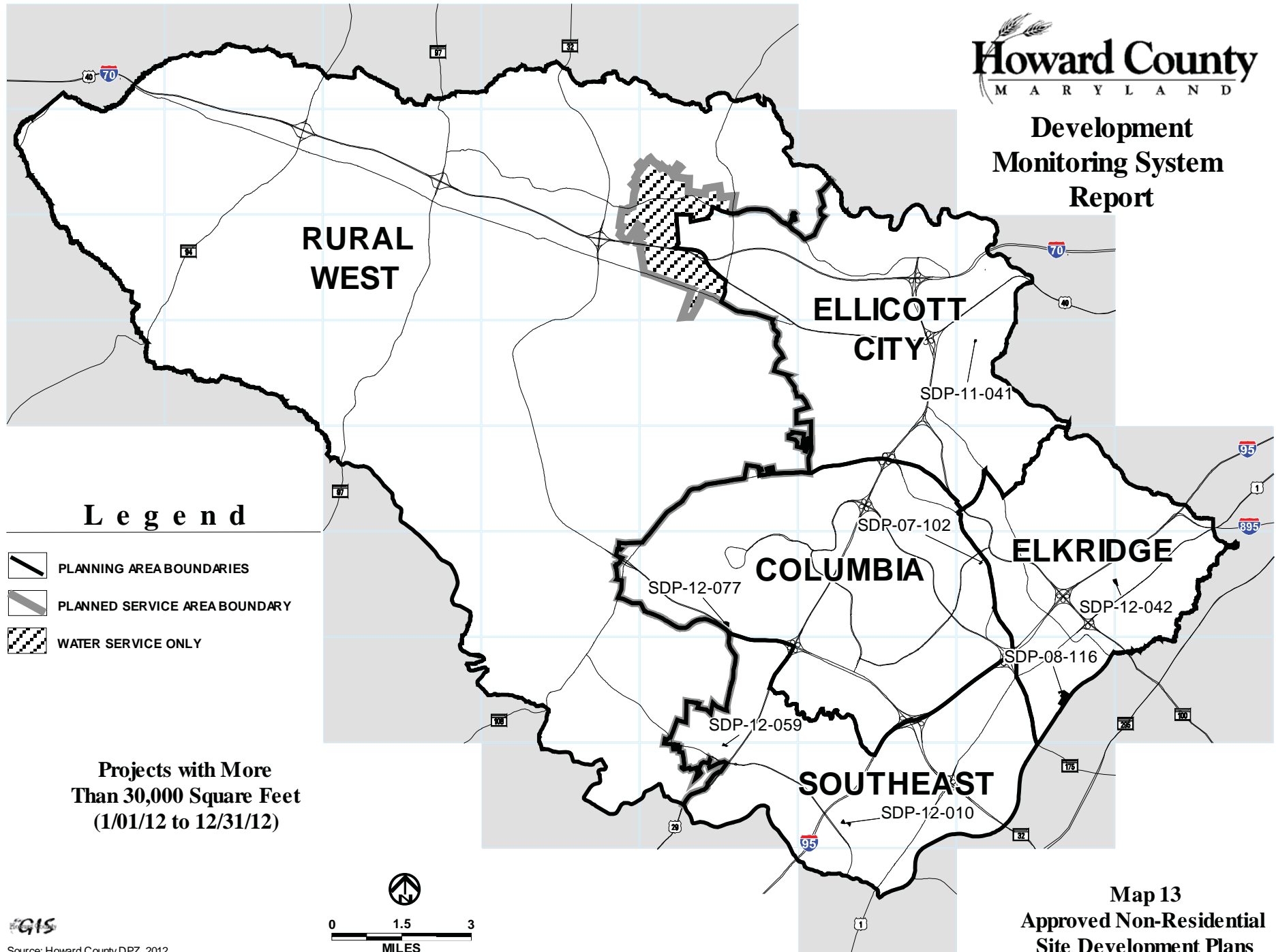
one in Emerson and the other in Maple Lawn Farms. In Ellicott City a 35,000 square foot school addition was approved.

Table 56
Projects With More Than 30,000 Square Feet in Approved Non-Residential Site Development Plans, 1/1/12 to 12/31/12

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-12-077	Grace Tech Park	Office Building	78,000	144,000
	SDP-07-102	Waterloo Crossing	Office Building	66,000	
Elkridge	SDP-08-116	Dorsey Run Industrial Center	Warehouse/Office	157,800	259,828
	SDP-12-042	Ducketts Lane Elementary School	Public School	102,028	
Ellicott City	SDP-11-041	Linwood Center, Inc.	School Addition	34,278	34,278
Southeast	SDP-12-010	Emerson	Office Building	153,454	292,875
	SDP-12-059	Maple Lawn Farms	Office Building	139,421	
TOTAL					586,981



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Source: Howard County DPZ, 2012.

Five Year Results

Table 57 shows the Countywide approved non-residential site development plans for the last five reporting periods from October 1, 2006 to December 31, 2011. Over this timeframe there were 198 plans approved on 1,602 acres including 6.3 million square feet of building space. This equates to an annual average of about 1.2 million square feet of new building space per year.

Last year, with only 434,304 square feet of approved space, was the smallest of all time periods. More than twice that amount was approved during the previous reporting period with 978,000 square feet. This reflects a clear slowdown from the '06/'07 time period when almost 2.4 million square feet were approved. Chart 17 depicts this decrease over the last five years. The recent recession has no doubt impacted the non-residential real estate market in Howard County.

Table 58 shows the five year history by building type. Over the five years, about 57% of the total 6.3 million square feet was for office/service space. About 19% was for retail uses, 13% for manufacturing/extensive industrial space, 11% for government and institutional uses, and less than 1% for other uses.

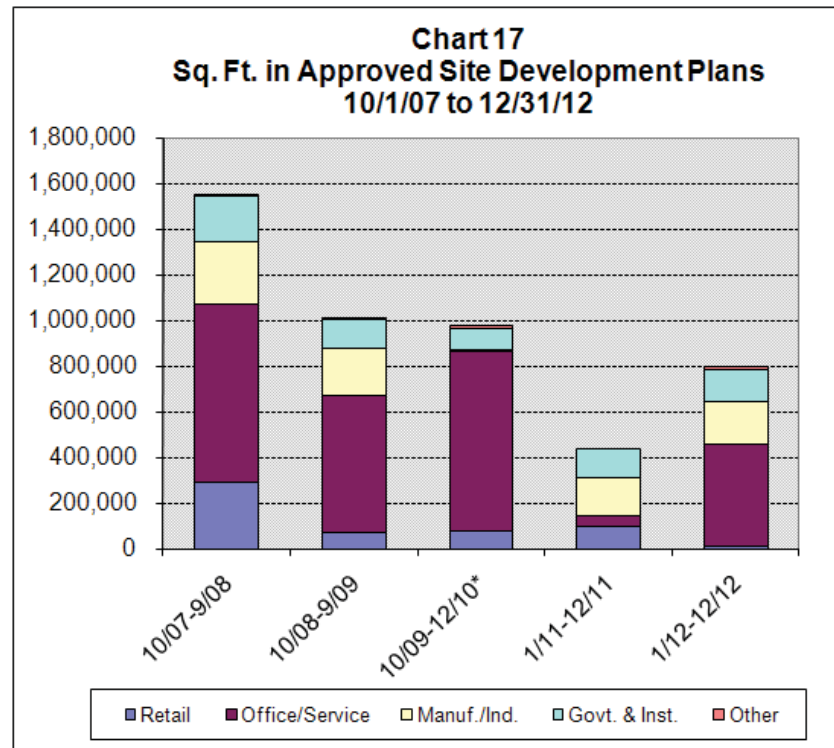


Table 57
Approved Non-Residential Site Development Plans
10/01/07 to 12/31/12

Year	Square Feet	Number or Plans	Acreage
10/07-9/08	1,551,216	49	333
10/08-9/09	1,005,507	34	260
10/09-12/10*	977,620	35	315
1/11-12/11	434,304	19	152
1/12-12/12	794,171	16	191
TOTAL	4,762,818	153	1,251
ANNUAL AVG.	907,203	29	238

* Extra quarter included due to change in analysis timeframe

Table 58
Building Square Feet in Approved Site Development Plans
10/01/07 to 12/31/12

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/07-9/08	290,184	776,645	278,920	197,662	7,805	1,551,216
10/08-9/09	67,872	601,203	205,296	130,416	720	1,005,507
10/09-12/10*	77,363	783,249	10,420	94,929	11,659	977,620
1/11-12/11	99,797	42,560	167,419	124,528	0	434,304
1/12-12/12	10,180	446,128	188,527	136,306	13,030	794,171
TOTAL	545,396	2,649,785	850,582	683,841	33,214	4,762,818
PERCENT	11.5%	55.6%	17.9%	14.4%	0.7%	100.0%

* Extra quarter included due to change in analysis timeframe

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of December 31, 2012 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 42 non-residential site development plans in process as of December 31, 2012. These plans include about 1.1 million square feet of building space covering 426 acres. This compares to about 1.1 million square feet in 31 plans on 306 acres that were in process the previous year (on December 31, 2011).

As shown in Table 59, the Southeast had the most square footage in process, followed by Elkridge. Table 60 shows a more detailed breakdown of square footage by building type. About 412,000 square feet are for office/service buildings and 352,000 for manufacturing/extensive industrial uses. Retail space accounts for 127,000 square feet and there is 186,000 square feet of government and institutional space in process.

Major Projects

Table 61 shows site development plans with buildings greater than 30,000 square feet. Map 14 shows the locations of these projects. These projects account for about 73% of the total 1.1 million square feet of building space in process.

Table 59
In-Process Non-Residential Site Development Plans, 12/31/12
with Comparisons to Countywide In-Process on 12/31/11

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	51,266	5%	4	10%	33	8%
All Other Columbia	168,268	15%	6	14%	98	23%
Elkridge	304,266	28%	12	29%	133	31%
Ellicott City	111,132	10%	12	29%	125	29%
Rural West	1,102	0%	2	5%	4	1%
Southeast	456,538	42%	6	14%	33	8%
TOTAL	1,092,572	100%	42	100%	426	100%
12/31/2011	1,089,533		31		306	

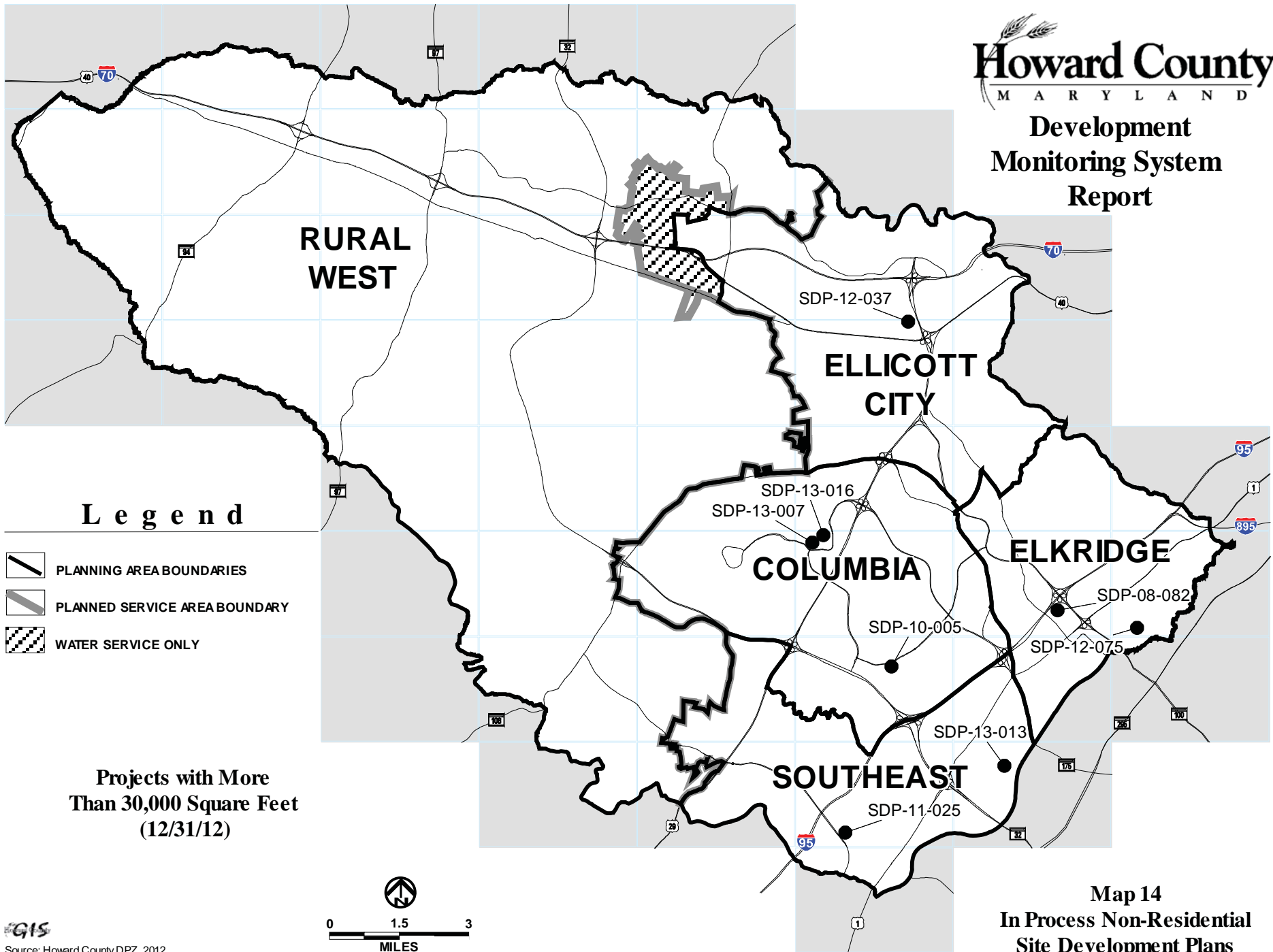
Table 60
Building Square Feet in In-Process Site Development Plans, 12/31/12
with Comparisons to Countywide In-Process on 12/31/11

Region	Retail	Office/		Govt.		TOTAL
		Service	Manuf./ Ext. Ind.	& Inst.	Other	
Downtown Columbia	51,266	0	0	0	0	51,266
All Other Columbia	21,637	2,550	112,700	24,000	7,381	168,268
Elkridge	10,303	148,389	31,119	114,455	0	304,266
Ellicott City	22,622	48,580	0	31,486	8,444	111,132
Rural West	0	1,102	0	0	0	1,102
Southeast	21,404	211,063	207,827	16,244	0	456,538
TOTAL	127,232	411,684	351,646	186,185	15,825	1,092,572
PERCENT	11.6%	37.7%	32.2%	17.0%	1.4%	100.0%
12/31/2011	51,306	583,285	356,744	82,818	15,380	1,089,533

Table 61
Projects With More Than 30,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/12

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-13-007, 13-016	The Mall in Columbia & Warfield	Retail	51,266	51,266
Columbia	SDP-10-005	Midway Business Center	Office/Warehouse	112,700	112,700
Elkridge	SDP-08-082	Corridor 95 Business Park	Office	108,000	203,747
	SDP-12-075	Middle School #20	Public School	95,747	
Ellicott City	SDP-12-037	Bethel Korean Presbyterian Church	Church Expansion	31,486	31,486
Southeast	SDP-13-013	Patuxent Park Industrial Area	Warehouse/Office	246,850	400,304
	SDP-11-025	Emerson Parcel G-1/Revitz Property	Office	153,454	
TOTAL					799,503

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Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by planning area. The data comes from the Howard County Department of Inspections, Licenses and Permits.

Summary of Last Year

For the latest reporting period, from January 1, 2012 to December 31, 2012, 60 permits were issued for almost 1.1 million square feet in non-residential building space (Table 62). The greatest amount of square footage was in the Southeast, followed by Elkridge and then Columbia.

Table 62
Issued Non-Residential Building Permits, 1/01/12 to 12/31/12

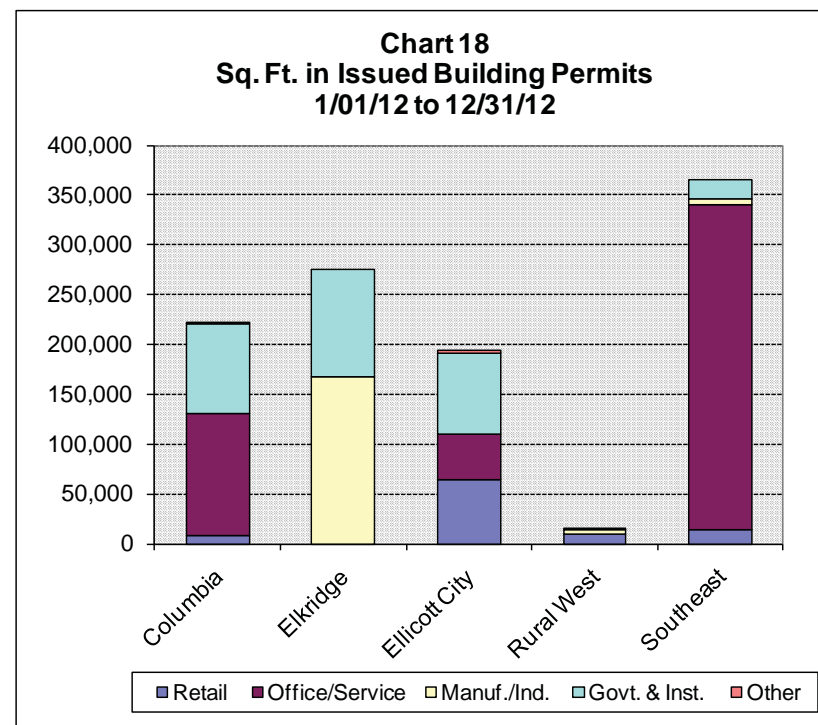
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%
All Other Columbia	221,837	21%	20	33%
Elkridge	274,961	26%	8	13%
Ellicott City	193,871	18%	16	27%
Rural West	15,451	1%	4	7%
Southeast	365,342	34%	12	20%
TOTAL	1,071,462	100%	60	100%

Table 63 shows the approved square footage by building type. About 494,000 square feet, 46% of the total, are for office/service uses. Another 28%, about 299,000 square feet, are for government & institutional uses. This is followed by manufacturing/extensive industrial, retail and other uses. These last three categories combined make up the remaining 25% of the total square footage issued. Chart 18 shows this breakdown graphically by Planning Area. It is clear that office/service space in the Southeast was the majority permitted.

Table 63
Building Square Feet in Issued Building Permits
01/01/12 to 12/31/12

Region	Office/Service		Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
	Retail	Service				
Downtown Columbia	0	0	0	0	0	0
Columbia	7,786	122,602	0	90,415	1,034	221,837
Elkridge	0	0	167,842	107,119	0	274,961
Ellicott City	64,361	45,029	0	81,174	3,307	193,871
Rural West	9,020	0	4,931	0	1,500	15,451
Southeast	13,895	326,186	5,438	19,823	0	365,342
TOTAL	95,062	493,817	178,211	298,531	5,841	1,071,462
PERCENT	8.9%	46.1%	16.6%	27.9%	0.5%	100.0%

Chart 18
Sq. Ft. in Issued Building Permits
1/01/12 to 12/31/12



Last Year's Projects - Greater than 30,000 Square Feet

Of the 1.1 million square feet of non-residential building space in issued permits over the current reporting period, about 841,000 square feet, 78% of the total, were in plans with more than 30,000 square feet. These larger buildings are shown in Table 64. The location of these buildings are shown on Map 15.

The largest projects were office buildings in Maple Lawn (154,300 square feet) and Emerson (138,500 square feet) in the Southeast.

In Elkridge, building permits for three large projects were issued - a new elementary school (103,000 square feet) and two storage/warehouse buildings on Montevideo Road (83,000 and 76,000 square feet).

In Columbia, a new 54,000 square foot office building was permitted in Waterloo Crossing. A similarly sized 54,000 square foot office building was permitted in Columbia Gateway. Atholton high school is also receiving a 47,000 square foot addition as part of its major renovation.

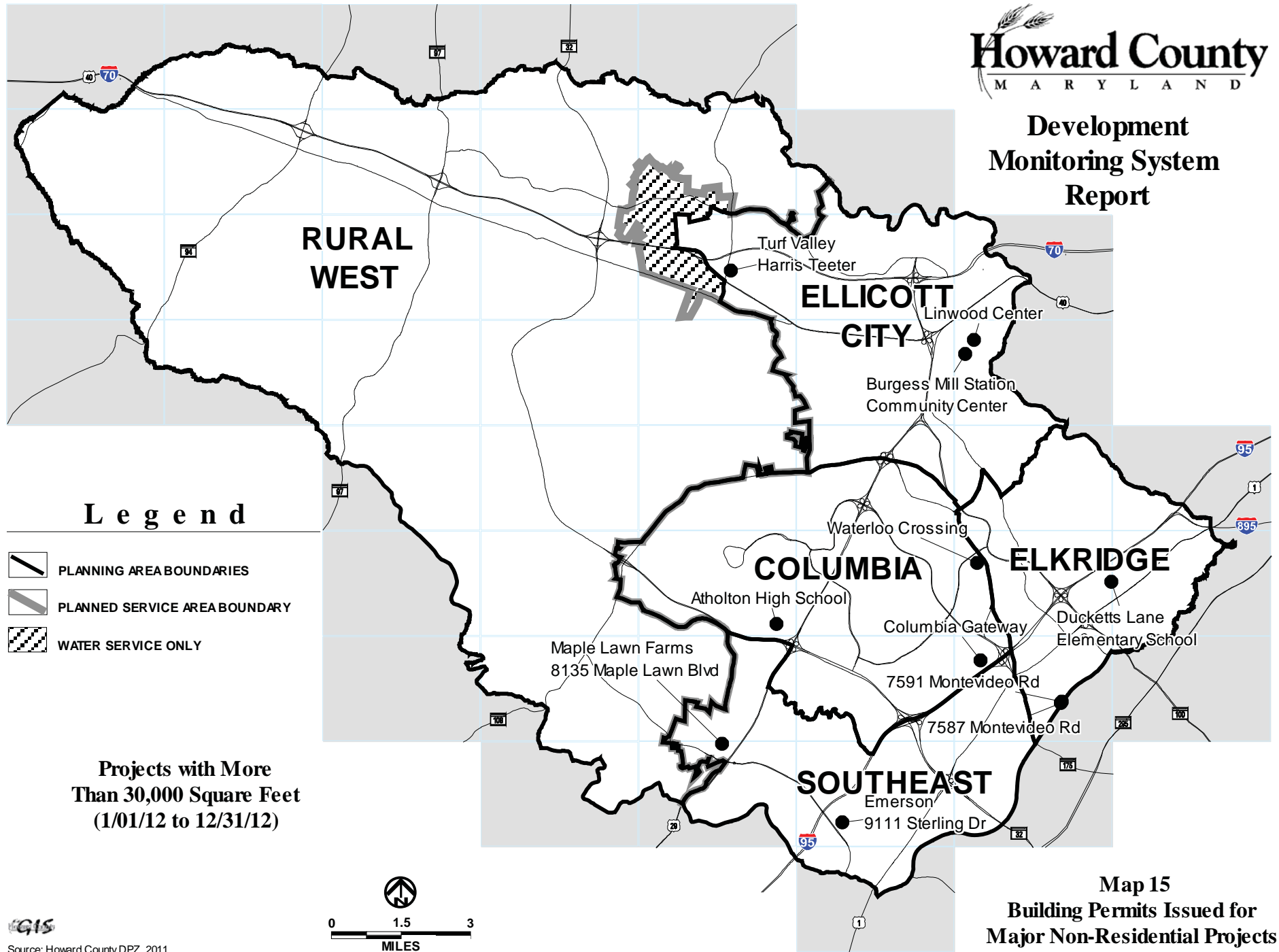
In Ellicott City, a new 51,000 square foot Harris Teeter grocery store is being constructed in Turf Valley. Other larger projects in Ellicott City include a new 46,000 square foot community center and indoor pool as part of Burgess Mill Station (Hilltop redevelopment) and a new school building in the Linwood Center.

Table 64
Building Permits Issued for Major Non-Residential Projects With More Than 30,000 Square Feet, 1/01/12 to 12/31/12




Region	Name	Proposed Use	Square Feet	TOTAL
Columbia	Waterloo Crossing	Office Building	54,442	155,560
	Columbia Gateway - Benjamin Franklin Dr.	Office Building	54,144	
	Atholton High School	High School Renovation/Expansion	46,974	
Elkridge	Ducketts Lane Elementary School	New Elementary School	102,705	261,464
	7591 Montevideo Road	Storage/Warehouse	82,940	
	7587 Montevideo Road	Storage/Warehouse	75,819	
Ellicott City	Turf Valley Harris Teeter	Grocery Store	50,511	131,223
	Burgess Mill Station Community Center	Community Center and Pool	46,434	
	Linwood Center	New School Building	34,278	
Southeast	Emerson - 9111 Sterling Drive	Office Building	154,294	292,841
	Maple Lawn Farms - 8135 Maple Lawn Blvd.	Office Building	138,547	
TOTAL				841,088



Development Monitoring System Report



Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

Projects with More Than 30,000 Square Feet (1/01/12 to 12/31/12)



Source: Howard County DPZ, 2011.



**Map 15
Building Permits Issued for
Major Non-Residential Projects**

Five Year Results

Table 65 shows issued non-residential building permits countywide for the last five reporting periods from October 1, 2007 to December 31, 2012. Over this timeframe there were 383 permits issued for about 5.5 million square feet of building space. This equates to an annual average of about 1.05 million square feet per year.

The latest reporting period, with 1,071,462 square feet in issued permits is an increase from the only 777,912 square feet permitted the year before, which was the smallest annual amount ever reported since the Development Monitoring System was established in 1992.

Table 66 shows the five year history by building type. Over the five years, 43% of the total 5.5 million square feet was for office/service space. About 12% was for retail space, 24% for government and institutional uses and 10% for manufacturing/extensive industrial space. Chart 19 shows this graphically.

Table 65
Issued Non-Residential Building Permits
10/01/07 to 12/31/12

Year	Square Feet	Number of Permits
10/07-9/08	1,459,126	93
10/08-9/09	1,068,150	86
10/09-12/10*	1,117,809	83
1/11-12/11	777,912	61
1/12-12/12	1,071,462	60
TOTAL	5,494,459	383
ANNUAL AVG.	1,046,564	73

* Extra quarter included due to change in analysis timeframe

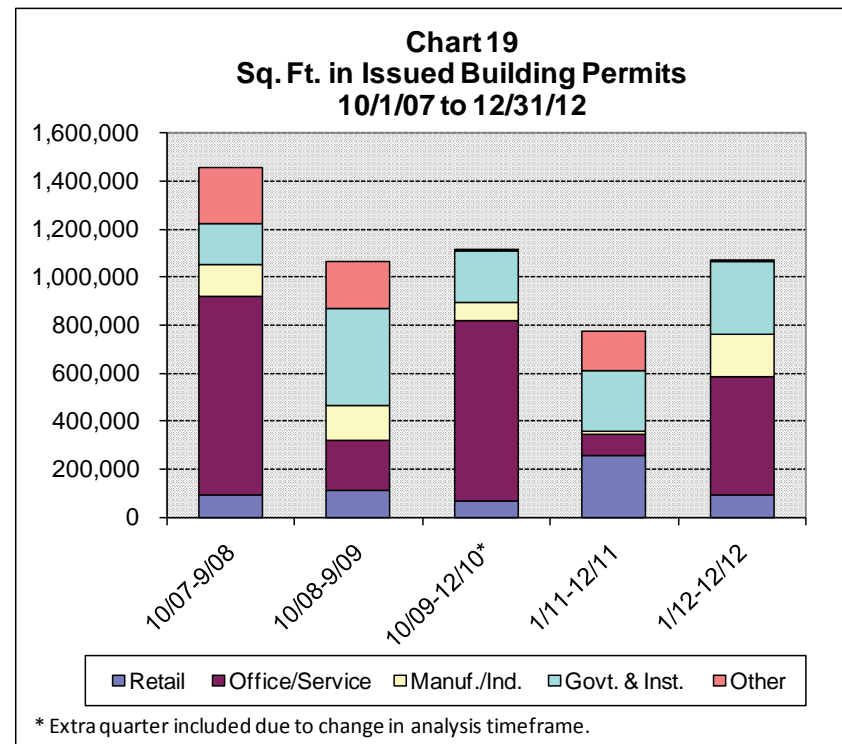


Table 66
Building Square Feet in Issued Building Permits
10/01/07 to 12/31/12

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/07-9/08	94,586	827,946	133,171	171,269	232,154	1,459,126
10/08-9/09	115,599	205,726	148,695	399,340	198,790	1,068,150
10/09-12/10*	68,708	752,768	75,881	212,786	7,666	1,117,809
1/11-12/11	259,420	90,853	9,310	253,670	164,659	777,912
1/12-12/12	95,062	493,817	178,211	298,531	5,841	1,071,462
TOTAL	633,375	2,371,110	545,268	1,335,596	609,110	5,494,459
PERCENT	11.5%	43.2%	9.9%	24.3%	11.1%	100.0%

* Extra quarter included due to change in analysis timeframe

Employment Estimates

New job potential has been estimated based on the standard square feet per employee factors shown in Table 67. These factors are multiplied times the square footage of planned building space which is included on approved site development plans and building permits.

Table 67
Square Feet per Employee Standard Factors

Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	500

The first section below estimates future employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation and the U.S. Bureau of Economic Analysis.

Job Potential from Site Development Plans

Based on the above factors, building space in site development plans approved last year from January 1, 2012 to December 31, 2012 could accommodate an estimated 2,271 employees (Table 68). About 52% of the potential jobs are located in the Southeast, all office/service jobs. About 26% of the potential jobs are Columbia, mostly office/service jobs. About 19% of the jobs each are in the Elkridge. Only 3% of the new jobs are in Ellicott City.

Countywide, about 1,785 potential jobs, or about 79% of the total are office/service jobs. Another 273 are government and institutional jobs (12%). This is followed by 189 manufacturing/extensive industrial jobs (8%) and 25 retail jobs (1%).

Table 68
Potential Employment from Approved Non-Residential SDP's
By Use Category, 1/1/12 to 12/31/12

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	25	576	0	0	601	26%
Elkridge	0	30	189	204	423	19%
Ellicott City	0	7	0	69	76	3%
Rural West	0	0	0	0	0	0%
Southeast	0	1,172	0	0	1,172	52%
TOTAL	25	1,785	189	273	2,271	100%
PERCENT	1.1%	78.6%	8.3%	12.0%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 69 below, there is a potential of 2,988 new jobs that could be accommodated based on issued building permits. About 66% of the total are potential office/service jobs, mostly in the Southeast. This is followed by 20% government and institutional jobs, 8% retail jobs, and 6% manufacturing/extensive industrial jobs.

Table 69
Potential Employment from Issued Building Permits
By Use Category, 1/1/12 to 12/31/12

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	19	490	0	181	691	23%
Elkridge	0	0	168	214	382	13%
Ellicott City	161	180	0	162	503	17%
Rural West	23	0	5	0	27	1%
Southeast	35	1,305	5	40	1,385	46%
TOTAL	238	1,975	178	597	2,988	100%
PERCENT	8.0%	66.1%	6.0%	20.0%	100.0%	

State DLLR and U.S. BEA Employment Estimates

The previous sections estimate potential employment from new development. This section provides an overview of estimated employment changes as reported by the State Department of Labor, Licensing, and Regulation (DLLR) and the U.S. Bureau of Economic Analysis (BEA). This would include an increase in employment from new development as well as from any change in the number of jobs in existing building space. The latter would generally be impacted by changes in vacancy rates associated with the economy. It could also be a result of the re-configuration of existing building space resulting in more (or less) jobs per square foot. An example of this is the re-configuration of a warehouse to office use.

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance Law of Maryland and the unemployment compensation for federal employees program. Together these two account for approximately 98% of all wage and salary civilian employment. Since wage and salary employment represents approximately 93% of total civilian employment, DLLR estimates that their data reflects over 91% of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 23% of Howard County's employment in 2010 was not reported by the State.

Table 70 shows both DLLR and BEA employment data beginning in 2000. BEA data have a two year lag time resulting in no available data for 2011 and 2012. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,427 jobs per year for the last 12 years. Job losses for 2009 and 2010 due to the recession as reported by DLLR have lowered this longer term average.

Jobs reported by the BEA through 2010 (the latest year available) result in an annual average of 3,137 new jobs from 2000 to 2010.

For the most recent reporting period, from 2011 to 2012, the State reports a significant increase of 7,147 jobs in Howard County. This is the second year in a row with job increases, which followed two years of job losses resulting from the recession, which lasted from December 2007 through June 2009. That had been the first two year decline in jobs in Howard County in recent history (at least as far back as 1969). The last time a single year job loss occurred was in 1991 when 373 jobs were lost as reported by DLLR.

Table 71 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2011 and 2012. In the first quarter of 2012, DLLR reported that there were 154,504 jobs in Howard County with an average weekly wage of \$1,205. This compares to 147,357 jobs one year earlier with an average wage of \$1,139. This is a 5.8% increase in average weekly wages over the one year time period.

Table 70
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Change	Jobs	Increase
2000	124,843		159,188	
2001	130,717	5,874	164,984	5,796
2002	133,338	2,621	167,832	2,848
2003	133,231	(107)	168,209	377
2004	136,493	3,262	172,847	4,638
2005	135,462	(1,031)	178,019	5,172
2006	141,236	5,774	185,809	7,790
2007	145,385	4,149	190,036	4,227
2008	147,573	2,188	193,187	3,151
2009	142,266	(5,307)	187,096	(6,091)
2010	141,169	(1,097)	190,559	3,463
2011	147,357	6,188	NA	NA
2012	154,504	7,147	NA	NA
Average		2,472		3,137

1. Maryland State Department of Labor, Licensing and Regulation
(1st quarter employment)

2. U.S. Bureau of Economic Analysis (average annual employment)

Table 71
Jobs and Weekly Wages by Industry, 2011 and 2012

Job Type	2011		2012	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	647	\$1,296	616	\$1,482
State Government	3,626	\$883	3,576	\$1,020
Local Government	14,175	\$881	14,392	\$1,002
Subtotal/Average	18,448	\$896	18,584	\$1,021
Goods Producing				
Natural Resources and Mining	657	\$588	708	\$689
Construction	9,279	\$1,232	9,174	\$1,142
Manufacturing	6,250	\$1,573	6,850	\$1,680
Subtotal/Average	16,186	\$1,337	16,732	\$1,343
Service Providing				
Trade, Transportation, and Utilities	30,927	\$902	31,471	\$986
Information	3,752	\$1,756	3,589	\$1,808
Financial Activities	8,731	\$1,753	8,803	\$1,751
Professional and Business Services	37,469	\$1,634	41,825	\$1,693
Education and Health Services	14,764	\$773	15,569	\$828
Leisure and Hospitality	12,459	\$353	13,373	\$378
Other Services	4,621	\$624	4,557	\$666
Subtotal/Average	112,723	\$1,151	119,187	\$1,214
TOTAL	147,357	\$1,139	154,504	\$1,205

Source: State Department of Labor, Licensing and Regulation (1st quarter employment). Weekly wages.

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