



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

May 2014

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 2013 there were 1,545 housing units built in the County. Of these, 40% were single family detached homes, 38% were townhouses and 22% were condo or rental apartments. This is a 27% increase from the 2012 total of 1,220 new homes completed, an indication of the recovering housing market. Evidence of recovery is even more pronounced when considering building starts, which were up 39% this reporting period compared to the last, 2,317 permits issued in 2013 compared to 1,662 issued in 2012. This is the most since 1999 when there were 2,367 issued permits, a clear sign of a strengthening housing market. Of the issued permits in 2013, 29% were single family detached, 26% were townhouses, and 44% were rental or condo apartment units. This trend of larger numbers of rental and condo apartments constructed compared to single family units will continue with the on-going redevelopment of the Route 1 and Route 40 corridors and Downtown Columbia. As of December 2013, there were an additional 2,066 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 1.32 million square feet of non-residential space in 2013. This is a 24% increase over the 1.07 square feet issued in 2012. The amount of square feet in approved site development plans also increased significantly last year, from 794,000 square feet in 2012 to 1.09 million square feet in 2013, a 37% increase. However, at the end of 2013 there were only 620,000 square feet of commercial space in the site development plan process awaiting final approval, representing a slowdown in the commercial sector compared to these more recent increases. Despite this slowdown, however, more commercial activity is on the horizon as the redevelopment of Downtown Columbia progresses.

This report also includes information on the development activity of moderate income and age-restricted housing units as well as land preservation. The County's most recent general plan, PlanHoward 2030, has clear policies and implementation strategies for providing housing for diverse income levels and an aging population, as well as to preserve land for agricultural uses and to support environmental sustainability. The details provided in this report quantify progress on these initiatives.

Sincerely,



Marsha S. McLaughlin,
Department of Planning and Zoning

Development Monitoring System Report

Date Issued:

May 2014

Reporting Period:

January 1, 2013 to December 31, 2013
With countywide summaries from 2008

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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 adopted in July, 2012, 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 became effective March 14, 2013 when the APFO legislation was amended to align with 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. Current APFO restrictions are further discussed on Page 15 of this report.

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 coupled with growth controls helps the County plan for future infrastructure needs and provide for the timely construction of schools, roads and other public infrastructure.

Development Monitoring System Report (DMS)

This is the 22nd 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 second year development activity in Downtown Columbia is included in the DMS report given that the implementation of the Downtown Columbia Plan has begun. Several projects there were in planning stages in 2012 and construction has followed during this 2013 reporting period.

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 fourth DMS report that incorporates this time adjustment and covers calendar year 2013.

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. A discussion on APFO restrictions, which is required to be reported every other year, is also included in this year's report

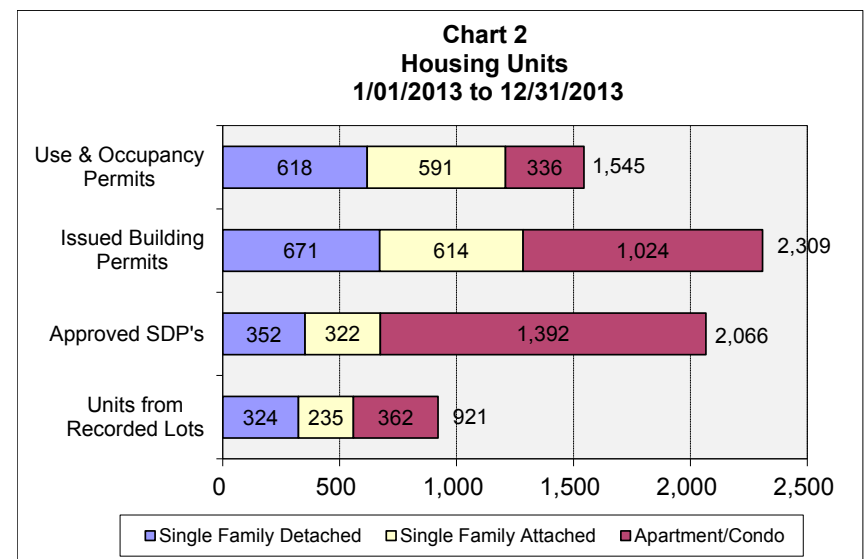
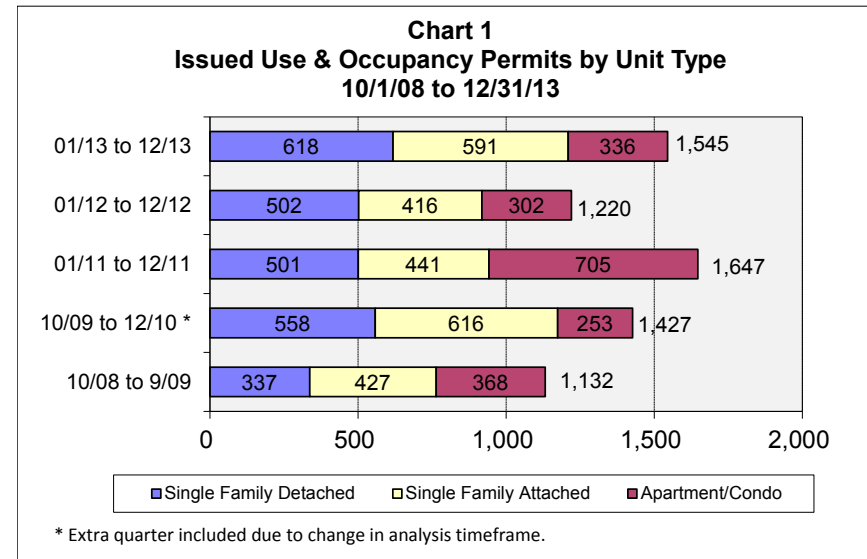
The reporting of these additional items not only meet the State planning requirements, but given that they will be integrated into DPZ's existing reporting process and structure, further context will be created – a context that will enable a better understanding of land development issues, policies and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

Residential Development

Total Housing Activity

- Over the last five years, there has been an annual average of 1,328 new housing units built in the County. About 36% of these have been single family detached, 36% single family attached or townhouse units, and 28% apartment units (including both rental and condo). (Chart 1)
- During the latest reporting period, from January through December 2013, 1,545 housing units were built. This is an increase from the previous reporting period when 1,220 units were built. (Chart 1)
- Of the 1,545 completed units last year, 40% were for single family detached, 38% for townhouse and 22% for apartment units (condo or rental). Greater percentages of townhouse and apartment units are likely to persist given the zoning of the remaining undeveloped land in the County as well as higher density redevelopment initiatives.
- Last year, about 35% of all units were built in Elkridge, 25% in both Ellicott City and the Southeast, 10% in the Rural West, and 4% in the non-downtown parts of Columbia. (See map on Page 6 that show these five planning areas.)
- There were 2,309 building permits issued (housing starts) during 2013 (Chart 2). This is significantly more than the 1,559 permits issued in 2012 and the most issued since 1999 with 2,367 permits, a clear sign of a recovery in the residential market.
- In 2013 there was potential for 921 housing units from recorded lots and 2,066 units approved in site development plans (Chart 2).
- As of December 31, 2013 there were 7,740 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 7,069 units in process for the prior reporting period (December 31, 2012).
- A significant number of the in-process units – 6,008 or 78% of the total 7,740 – are included in future phases of phased projects with development planned as far out as 2020. The larger phased plans include Maple Lawn, Annapolis Junction Town Center and Laurel Park Station in the Southeast; The Overlook at Blue Stream, Oxford Square and Howard Square in Elkridge; and Turf Valley and the Courtyards in Ellicott City. Walnut Creek in the Rural West is also phased.

- Countywide, 20% of the units in process on December 31, 2013 were single family detached units. About 22% were single family attached units and another 58% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 121 age-restricted housing units built in 2013, 8% of the total 1,545 units built in the County. These 121 units consisted of 37 single family detached units, 36 townhomes and 48 apartment or condo units. Most all the units were built in Ellicott City and the Southeast.
- As of December 31, 2013 there were 360 age-restricted units in the planning process – 94 single family detached units, 138 townhouse units and 128 apartment or condo units. About 56% these are in Ellicott City, 31% in the Southeast and the remaining 13% in Elkridge. For the previous reporting period there were 669 age-restricted units in process, 309 more than the current year.

Moderate Income Housing Units

- During 2013 there were 62 MIHU units in approved plans – 20 townhouse units and 42 apartment or condo units. This is slightly less than the 79 approved MIHU units the previous reporting period.
- As of December 31, 2013 there were 779 MIHU units in process – 132 townhomes and 647 apartment or condo units. About 72% of the units were in Elkridge, 25% in the Southeast, and 4% in Ellicott City. By comparison, there were 784 MIHU units in process the previous reporting period.
- Of the 779 MIHU units in process, 27 are age-restricted. This is about 3.5% of all MIHU units in process and includes 12 apartment or condo units and 15 townhomes.

Rural Land Preservation

- In 2013 a 50 acre parcel was added to the County's Agricultural Land Preservation Program. An additional 165 acres of environmentally sensitive land were permanently preserved in the Rural West through subdivision activity using the cluster subdivision zoning regulations and Density/Cluster Exchange Options (DEO/CEO).
- Preservation easements in the Rural West have been steadily increasing and now total 29,700 acres. This includes 21,651 acres of agricultural preservation easements and 8,049 acres of environmental preservation parcels dedicated through the subdivision process. This totals 31% of all land in the Rural West. Including park land, WSSC land and other environmental easements, 44% of the Rural West is now permanently preserved.

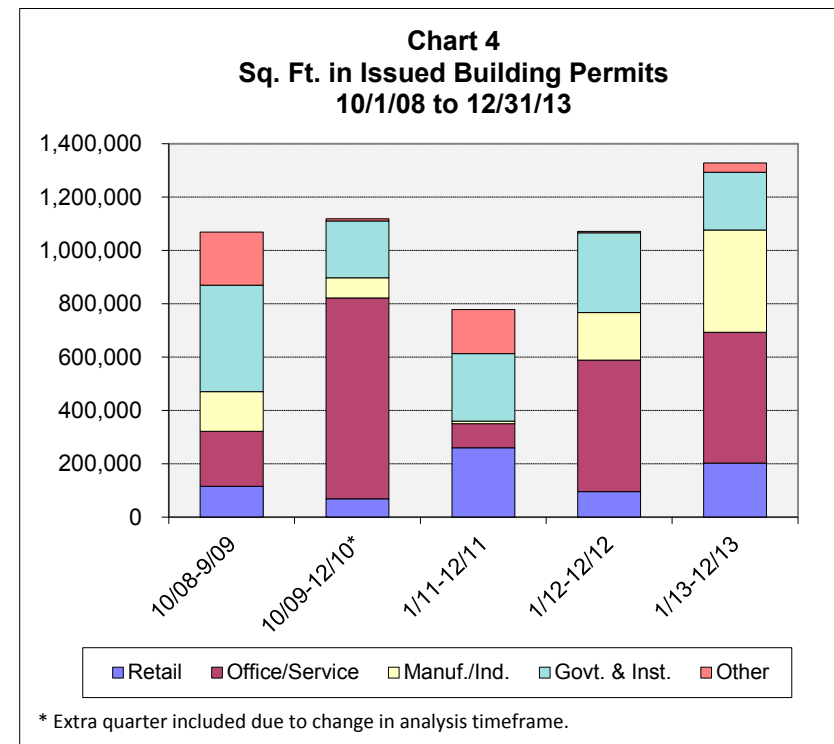
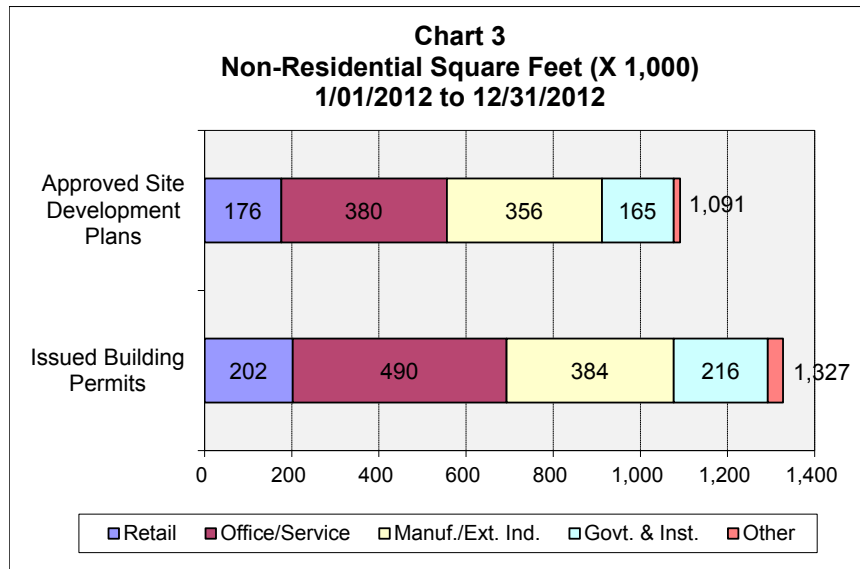
Housing Sales

- Home sales prices in Howard County increased last year by 5.3%, from a median sales price of \$380,000 in 2012 for all housing types combined to \$400,000 in 2013. This is the first significant increase in several years. The mean sales price rose last year to \$434,306 from \$411,911, a 5.4% increase.
- For the latest reporting period, the median sales price for condos was \$208,000. Single family attached units sold on average for \$328,823. The median single family detached home in the county sold for \$520,000.
- Mean sales prices last year were \$206,440 for condo units, \$339,192 for single family attached units and \$539,433 for single family detached units.
- The number of home sales increased significantly last year with total of 4,602 sales. This is 17.7% increase from the 3,911 sales reported in 2012.

Non-Residential Development

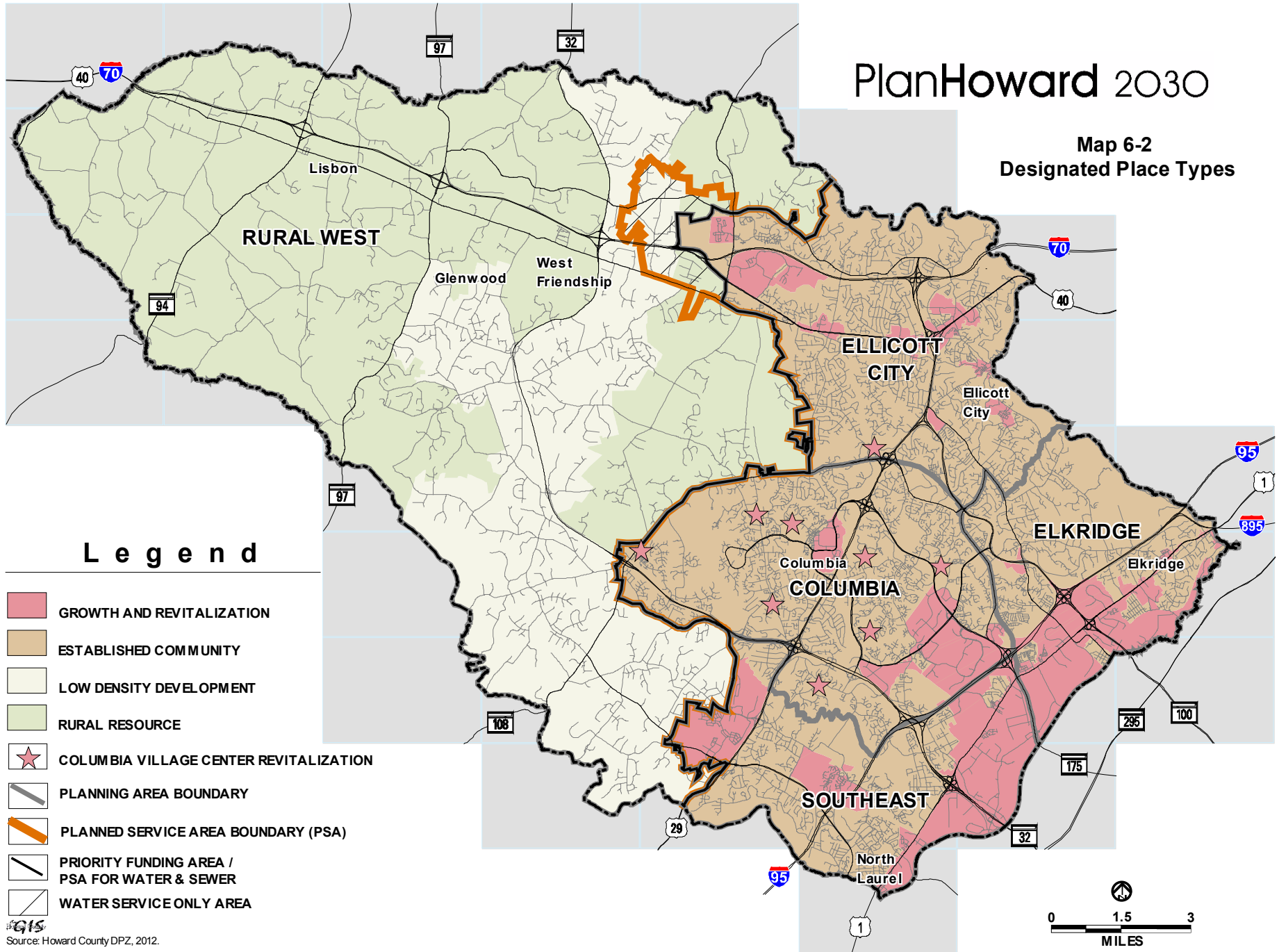
- From January through December 2013, close to 1.1 million square feet of building space were approved in site development plans. Building permits were issued for slightly more than 1.3 million square feet. (Chart 3).
- As shown in Chart 4 there was an increase in the square footage of issued building permits last year, from 1.1 million square feet issued in 2012 to 1.3 million square feet issued in 2013. This is the greatest amount issued over the last 5 years.
- Over the last five years, there was an annual average of 820,000 square feet in approved site development plans and 1.02 million square feet in issued building permits.

- About 45% of the new building space constructed last year is located in the Southeast and 24% in Columbia (not Downtown). About 12% of the total was constructed in Ellicott City, 11% in Elkridge, 7% in Downtown Columbia, and 1% in the Rural West.
- As of December 31, 2013, there were 620,000 square feet in-process in site development plans. This is less than the 1.1 million square feet in process the previous year.
- According to the State Department of Labor, Licensing and Regulation, the County gained 1,896 jobs last year (1st quarter 2012 to 1st quarter 2013 statistics). This is about a 1% increase bringing the total jobs in Howard County to 156,400.



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

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 is included in this 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 in support of the General Plan)

CB 41-2012 – New APFO Allocation Categories

Howard County's General Plan, known as PlanHoward 2030, was adopted in July, 2012. This new plan set forth new APFO housing unit allocation areas and unit phasing. The purpose of CB-41-2012, adopted in January 2013, is to establish these areas which correspond to Designated Place Types. In addition to allocations distributed by Designated Place Type geography, there are also Green Neighborhood and Downtown Columbia allocations categories.

CR 169-2012 – Adopting the Housing Unit Allocation Chart

This resolution officially adopted the new allocation numbers for the new allocation areas established under CB-41-2012 described above.

CR 170-2012 – Adopting the Open/Closed Schools Chart

This resolution officially adopted the Open/Closed Schools chart, which by definition must be adopted every time a new allocation chart is adopted.

CB 1-2013 – Amending PlanHoward 2030

PlanHoward 2030 was amended as follows: defining Growth Tiers, as required by the Maryland Sustainable Growth and Agricultural Preservation Act of 2012; specifying additional designated place types to correspond with the Growth Tiers; revising certain maps to reflect the additional designated place types; and adding new text to describe the Growth Tiers and adding new maps.

CR 13, 14, 15-2013 – Recommending denial to terminate a Maryland Agricultural Land Preservation Foundation (MALPF) easement

A property owner had requested to remove 479 acres from under a MALPF easement. Both the County and the State must approve this request. These resolutions approved by the County Council recommend denial for removal. The property owner is now appealing to the State.

CB 7-2013 – Amending the Historic Tax Credit Program

This bill provides that historic outbuildings are eligible for purposes of the

Historic Tax Credit Program. It also provides that work performed by an architect or historic preservation consultant is a qualified expense.

CB 8, 38-2013, CR 21-2013 – Establishing a Watershed Protection and Restoration Fund

This bill creates a Watershed Protection and Restoration enterprise fund and establishes a new fee to be charged to residential and non-residential property owners for the purpose of watershed protection and restoration. New funding is required for the 10 Phase I Stormwater Permit jurisdictions per HB 987, which was adopted by the Maryland Legislature in April 2012.

CB 9-2013 – Amendments to the Howard County Agricultural Land Preservation Program (ALPP)

This bill amended the ALPP program by allowing all property 20 acres or larger to be eligible for applying to the program. Before this amendment was adopted, properties between 20 and 50 acres must have been adjacent to land that is already preserved in order to apply. This change opens up the program to more farms. The bill also amended the ALPP so that applications submitted to the program can be done so through open enrollment, rather than done by "batches".

CB 10-2013 – Amending Right to Farm law

This bill amends the County's Right to Farm Law, initially enacted in 1989, strengthening the protective language and expanding the scope of farming activities, so that the agricultural community can operate free of the threat of nuisance suits. It adds a provision that no legal action shall be maintained against a farmer if mediation has not been sought through the Maryland Department of Agriculture's Conflict Resolution Service.

CR 22-2013 – Amending the Purchase Price Formula for the ALPP

This amendment provides for optional points for a farm's location within a Green Infrastructure Network, removes optional points earned for a Heritage Farm and optional points awarded by the Howard County Agricultural Land Preservation Board, and provides that certain points shall only be awarded for parcels in the RC zoning district.

CR 86-2013 – Adopting the Housing Unit Allocation Chart

This resolution officially adopted the new allocation numbers for the new allocation areas for the 2016 allocation year.

CR 87-2013 – Adopting the Open/Closed Schools Chart

This resolution officially adopted the Open/Closed Schools chart for the 2016 allocation year, which by definition must be adopted every time a new allocation chart is adopted.

CB 32-2013 – Adopting the 2013 Comprehensive Zoning Plan

The adoption of the Comprehensive Zoning Plan follows the adoption of PlanHoward 2030. The Comprehensive Zoning Plan includes revisions to the Zoning Maps and the Zoning Regulations, which includes requirements related to zoning districts, permitted uses, accessory uses, temporary uses, nonconforming uses, conditional uses, design standards, density, lot size, building height limits, setbacks, parking, and supplementary regulations.

CB 34-2013 – Amending the Moderate Income Housing Unit Provisions

This bill amends the Moderate Income Housing Unit law to provide more inclusive affordable housing at both low and moderate income levels by allowing developers the option to build and sell or rent units to low income households as well as to moderate income households.

CB 35-2013 – Amending the Moderate Income Housing Unit Provisions

This bill amends the Moderate Income Housing Unit law to allow developers of single-family detached dwellings that are required by the Zoning Regulations to provide moderate income housing units the option of providing alternative compliance, including paying a fee-in-lieu of building the MIHU's.

CB 36-2013 – Historic Property Tax Credit Increase

This bill provides for an increase in the current property tax credit for historic property renovations from 10% to 25% and for an increase the

historic tax credit from four years to up to five years.

CR 131-2013 – Green Neighborhood Allocations

This resolution adopts alternative standards that must be met in order to receive a Green Neighborhood Allocation, Building Permit and Use and Occupancy Permit.

CR 136-2013 – Southeast Area as Sustainable Community

This resolution designates the Southeast Area as a Sustainable Community for approval either directly by the Maryland Department of Housing and Community Development or through the Maryland Smart Growth Sub-cabinet.

CR 157-2013 – Ellicott City Community Legacy Project

This resolution approves the application and the receipt of financing for a Community Legacy Project defined in Old Town Ellicott City and immediate vicinity.

Zoning Regulation Amendments

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County during 2013.

CB 36-2012 – Community Enhancement Floating District

The Community Enhancement Floating (CEF) District was established to encourage the creative development and redevelopment of commercial and residential properties through flexible zoning so that the proposed development complements and enhances the surrounding land uses and creates a more coherent, connected development. While it is envisioned that the CEF District could place residential uses on land zoned for employment in some circumstances, it should not be viewed primarily as a way to convert land zoned for employment to residential.

CB 6-2013 – Traditional Neighborhood Center District

The TNC overlay zoning district was amended to expand the permitted uses and change the bulk regulations.

CB 33-2013 – Manufacturing: Light and Heavy

This bill amends the Howard County Zoning Regulations to allow certain breweries as a matter of right in the M-1 (Manufacturing: Light) District and the M-2 (Manufacturing: Heavy) District.

CB 44-2013 – Farm Breweries

This bill amends the Howard County Zoning Regulations to allow certain farm breweries as an accessory use in certain Zoning Districts and subject to certain criteria.

Zoning Map Amendments

There were no piecemeal zoning map changes adopted in 2013. However, as highlighted on the previous page, the 2013 Comprehensive Zoning Plan was adopted (CB 32-2013). Comprehensive Zoning is conducted about once every 10 years after a new General Plan is adopted. Map 1 summarizes the zoning changes resulting from this plan.

There were 159 approved parcel changes as part of the Comprehensive Zoning Plan. Many of the parcels were contiguous resulting in a rezoning of a particular area. This is apparent on Map 1. A significant portion of the changes were along the Route 1 Corridor consistent with the County’s goal to revitalize older properties along the corridor and allowing for more mixed use and modern commercial space.

A total of 702 acres were rezoned adding a net additional capacity of 1,862 residential units. The majority of these units, 1,478 (79%), will be apartments (rental and condo). An estimated 226 (12%) will be single family attached units and the remaining 158 (9%) will be single family detached units.

Of the 702 acres rezoned, 432 acres (62%) were rezoned from commercial to residential or residential to higher density residential. Two hundred and twenty one acres (31%) were rezoned from a commercial zone to another commercial zone or from a residential zone to a commercial zone. The remaining 49 acres (7%) were rezoned from a residential zone to another residential zone allowing approximately the same housing unit density.

Subdivision & Land Development Regulation Amendments (and related)

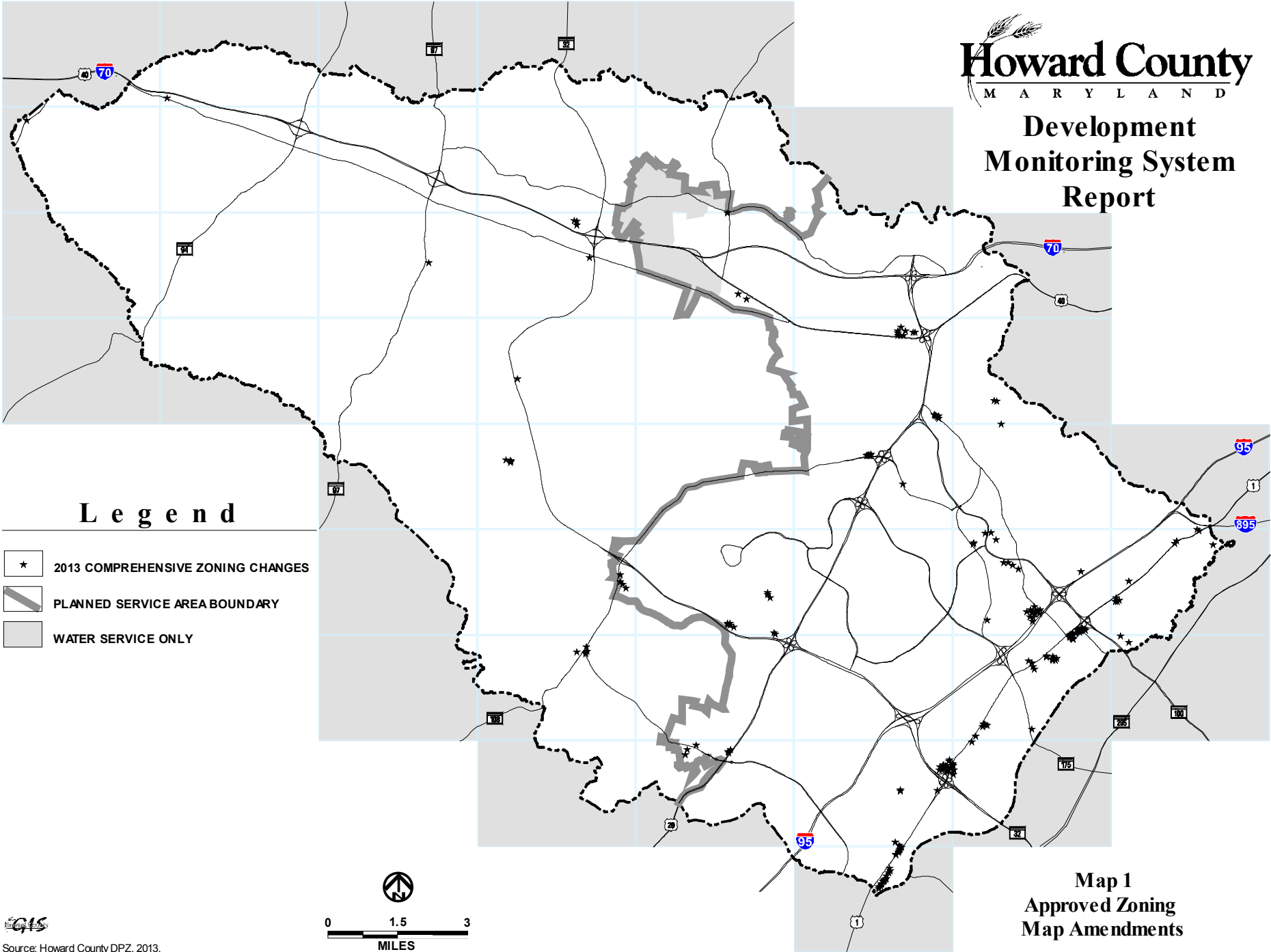
The following highlights all amendments to the Subdivision & Land Development Regulations (and other land use related code amendments) that were approved in Howard County during 2013.

CB-2-2013– Amending Sediment and Erosion Control Provisions




This bill amends sediment and erosion control provisions in Howard County as required by the Maryland Department of the Environment (MDE) pursuant to the Stormwater Management Act of 2007. This 2007 Act requires that Environmental Site Design (ESD), through the use of non-structural best management practices and other better site design techniques, be implemented to the maximum extent practicable.

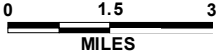


Development Monitoring System Report



Legend

-  2013 COMPREHENSIVE ZONING CHANGES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY



Source: Howard County DPZ, 2013.

Map 1
Approved Zoning
Map Amendments

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2013, 3.42 miles of new or extended roadway were constructed in Howard County. All of these additions were built in 14 new subdivisions as part of developer's agreements executed with the County. A total of 0.16 miles of roadway was abandoned in 2013. 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 2013 annual report to the State Highway Administration. The road additions are all shown on Map 2.

Other Transportation Facilities

In 2013 Howard County continued its pro-active and aggressive efforts to replace buses, install new shelters, improve pedestrian access to bus stops and develop a central operations facility. Three new fixed route low-floor heavy duty hybrid buses were placed into service and three new paratransit automobiles have been received. Another seven paratransit vehicles have been ordered, one which will have six wheelchair stations that can be used for special services or on the fixed-route system. Six bus shelters were rehabbed or replaced.

The Central Maryland Transit Operations Facility project continues to move forward. The construction contracts have been completed and the official groundbreaking occurred in March, 2014. The facility is expected to open in late 2014 or early 2015.

New Schools, School Renovations and Additions to Schools

The Howard County Public School System completed four systemic renovations, a major classroom addition and the new Ducketts Lane Elementary School in the 2013 calendar year. The concentration of the renovation and expansion efforts continues to be within the priority funding area.

Bollman Bridge Elementary School

This was a comprehensive systemic renovation which included the replacement of a modular addition with a permanent structure, enclosure of existing open area classrooms, and the addition of four classrooms with

associated expansion of other core areas. The capacity of the school increased from 566 to 663 seats. The Howard County Public School System (HCPSS) is pursuing Leadership in Energy and Environmental Design (LEED) certification for the school.

Ducketts Lane Elementary School

Ducketts Lane Elementary School is a new 102,028 square foot school with a capacity of 600 kindergarten through 5th grade students. Pre-kindergarten, Regional Early Childhood Center and Parks and Recreation classrooms are also included in the school. This school relieves overcrowded schools in the northern and northeastern regions of the County. The HCPSS is pursuing LEED Gold certification for the school, and the project earned the US Green Building Council's Wintergreen Award for 2013 for excellence in green building.

Gorman Crossing Elementary School

This 16,919 square foot addition to Gorman Crossing increased the capacity of the school from 540 to 713 seats. The cafeteria was also expanded and additional art, music and ensemble rooms were added to improve the function of the school with a larger enrollment.

Phelps Luck Elementary School

This was a comprehensive systemic renovation which included the enclosure of existing open area classrooms and the addition of four classrooms with associated expansion of other core areas increasing the capacity of the school from 540 to 640 seats. The HCPSS is pursuing LEED certification for the school.

Stevens Forest Elementary School

This also was a comprehensive systemic renovation which included the enclosure of existing open area classrooms and the addition of four classrooms with associated expansion of other core areas increasing the capacity of the school from 333 to 433 seats. The HCPSS is pursuing LEED certification for this school as well.

Thunder Hill ES

This was a comprehensive systemic renovation which included enclosure of existing open area classrooms and the addition of four classrooms with

associated expansion of other core areas increased the capacity of the school from 368 to 468 seats. The Regional Academic Life Skills (ALS) Program rooms were relocated, resized and renovated. The HCPSS received LEED Silver certification for the school

Other Community Facilities and Infrastructure

In 2013 the Department of Public Works completed the construction of the Marriottsville Elevated Water Tank and Pumping Station on the site of the Alpha Ridge Landfill, which serves two water zones. The installation of a new Motor Control Center at the Little Patuxent Wastewater Reclamation Plant (LPWRP) was also completed. Additionally, a variety of pipeline, pumping station and other LPWRP facility improvements are underway and are scheduled for completion in 2014. Construction has begun for the Fort Meade Reclaimed Water Pumping Station, Elevated Water Tank and distribution system. When construction of this is complete it will serve as cooling infrastructure for a new Data Center on the National Security Agency campus.

A new \$37.5 million Health Sciences Building was completed at the Howard County Community College. The new \$9 million Savage Fire Station as well as the new \$2 million Glenwood Fire Station were also completed. Construction of a \$7 million major phase of the Blandair Regional Park was also completed in 2013.

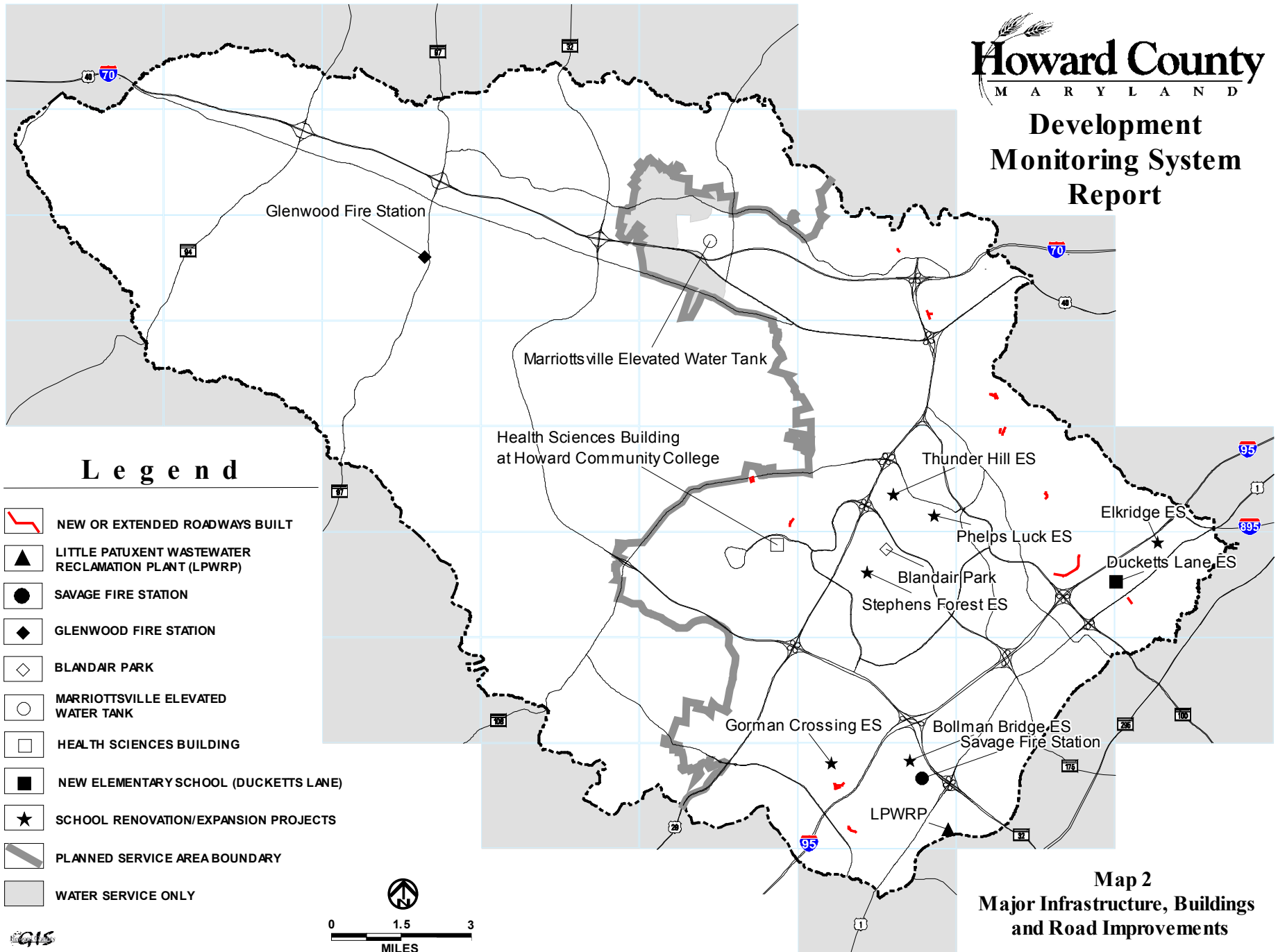
Consistency

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 known as PlanHoward 2030 – 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, most all the major community facilities and school projects that have been completed in 2013 are located within the Priority Funding Area. Furthermore, with the adoption of the 2013 Comprehensive Zoning Plan and new CEF zoning district along with an expanded and more inclusionary Moderate Income Housing Unit program further progress has been achieved on implementing important PlanHoward 2030 goals. The designation of Southeast Area as a Sustainable Community and Ellicott City as a Community Legacy Project also furthers growth and revitalization within the Priority Funding Area. The new APFO housing unit allocations that were adopted adhere to the growth projections outlined in PlanHoward 2030 reducing the number of units allocated in the Rural West and increase the number of Green Neighborhood allocations.

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Legend

-  NEW OR EXTENDED ROADWAYS BUILT
-  LITTLE PATUXENT WASTEWATER RECLAMATION PLANT (LPWRP)
-  SAVAGE FIRE STATION
-  GLENWOOD FIRE STATION
-  BLANDAIR PARK
-  MARRIOTTSVILLE ELEVATED WATER TANK
-  HEALTH SCIENCES BUILDING
-  NEW ELEMENTARY SCHOOL (DUCKETTS LANE)
-  SCHOOL RENOVATION/EXPANSION PROJECTS
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

**Map 2
Major Infrastructure, Buildings
and Road Improvements**

GIS
Source: Howard County DPZ, 2013.

APFO Restrictions

The Smart Green and Growing law of 2009 requires that each locality report and explain APFO restrictions that are within the Priority Funding Area. Starting July 1, 2010 local jurisdiction's first APFO reports were due to MDP, then every two years thereafter. Howard County DPZ first reported on this in 2010. This is the third such report.

The report is to include: 1) the location of the restriction, 2) the type of infrastructure affected by the restriction, 3) the proposed resolution of the restriction, if available, 4) the estimated date for the resolution of the restriction, if available, 5) if a restriction was lifted, the date the restriction was lifted, and 6) the resolution that lifted the restriction.

Overview of Howard County's APFO

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 was reduced by about half since the adoption of the 2000 General Plan, which establishes the annual number of housing unit allocations for new homes that can move through the development process. The recent adoption of PlanHoward 2030 maintains this lower pace of growth. Also part of APFO is 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.

Allocation Restrictions in 2013

The intent of Howard County's allocation system is to phase residential growth over time based on the County's General Plan. In this way, the County can pace growth evenly over time so it can plan, budget, and construct capital facilities for schools, roads, water and sewer, community, public safety, and other infrastructure.

By the end of 2013, there were no residential subdivisions delayed due to allocation limitations. The Allocations chart, which must be approved by the County Council, is typically adopted each July. However, last year in 2013 it was adopted initially in January (effective on March 13) in order to implement both the new allocation geography and numbers established in PlanHoward 2030, which had been recently adopted the previous July. With this change allocations are now distributed by Designated Place Type. Furthermore, the annual development pace has been reduced in the Rural West while allowing for more Green Neighborhood allocations in the East. A second chart was adopted in July 2013 staying on schedule to establish the numbers for the next allocation year. Prior to the adoption of this second chart in July, there were 5 subdivisions including a total of 14 housing units on hold. These plans were all allowed to proceed with the adoption of the new chart.

Closed School Restrictions

After a development project receives allocations, it takes what is called the Open/Closed Schools Test. To pass this test the elementary school district, the elementary school region, and the middle school district where the project is located all must be under 115% capacity. Howard County has 41 elementary schools and 18 middle schools (with a 19th scheduled to open in the fall of 2014), each in their own district. The elementary schools are divided up into six elementary school regions.

At the end of 2013 there were 4 closed middle school districts and 1 closed elementary school district. The closed middle school districts included Harpers Choice, Ellicott Mills, Dunloggin and Mount View. The closed elementary school districts was Bollman Bridge in the southeast elementary school region. There were 3 plans including 22 housing units immediately on hold due to closed schools. Additionally, there were 2 plans with 682 units on hold for future years due to closed schools.

A new middle school is currently under construction and will open in the fall of 2014. This will increase middle school capacity in the north-east part of the County.

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 2013. 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 2013 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 2013, 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 also applies to rental and condo apartments and condo townhomes.

The greatest average lot density occurred in Elkrigde at 20.26 units per acre based on 353 units built. This was followed by the Southeast at 16.92 units per acre, and then Ellicott City at 15.57 units per acre. Columbia saw an average lot density of 12.43 units per acre for projects completed in 2013. The Rural West, as expected, had the lowest average lot density at 0.88 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 17.03 units per acre. This compares to a much smaller lot density of 0.88 units per acre outside the PFA.

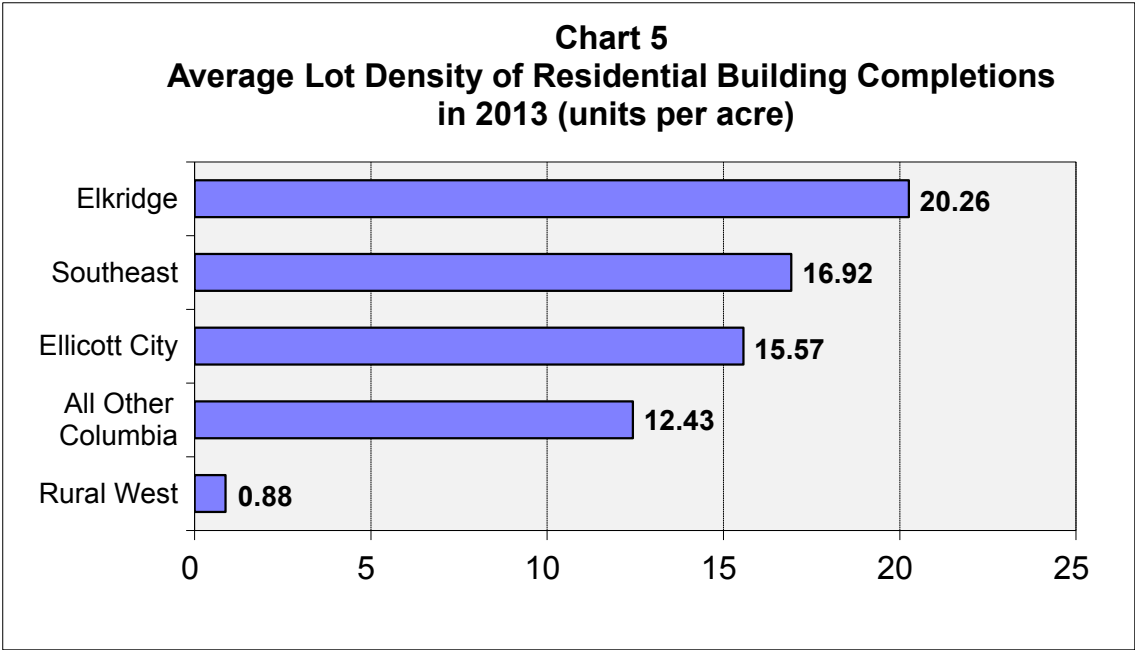
Map 3 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2013 - By Planning Area

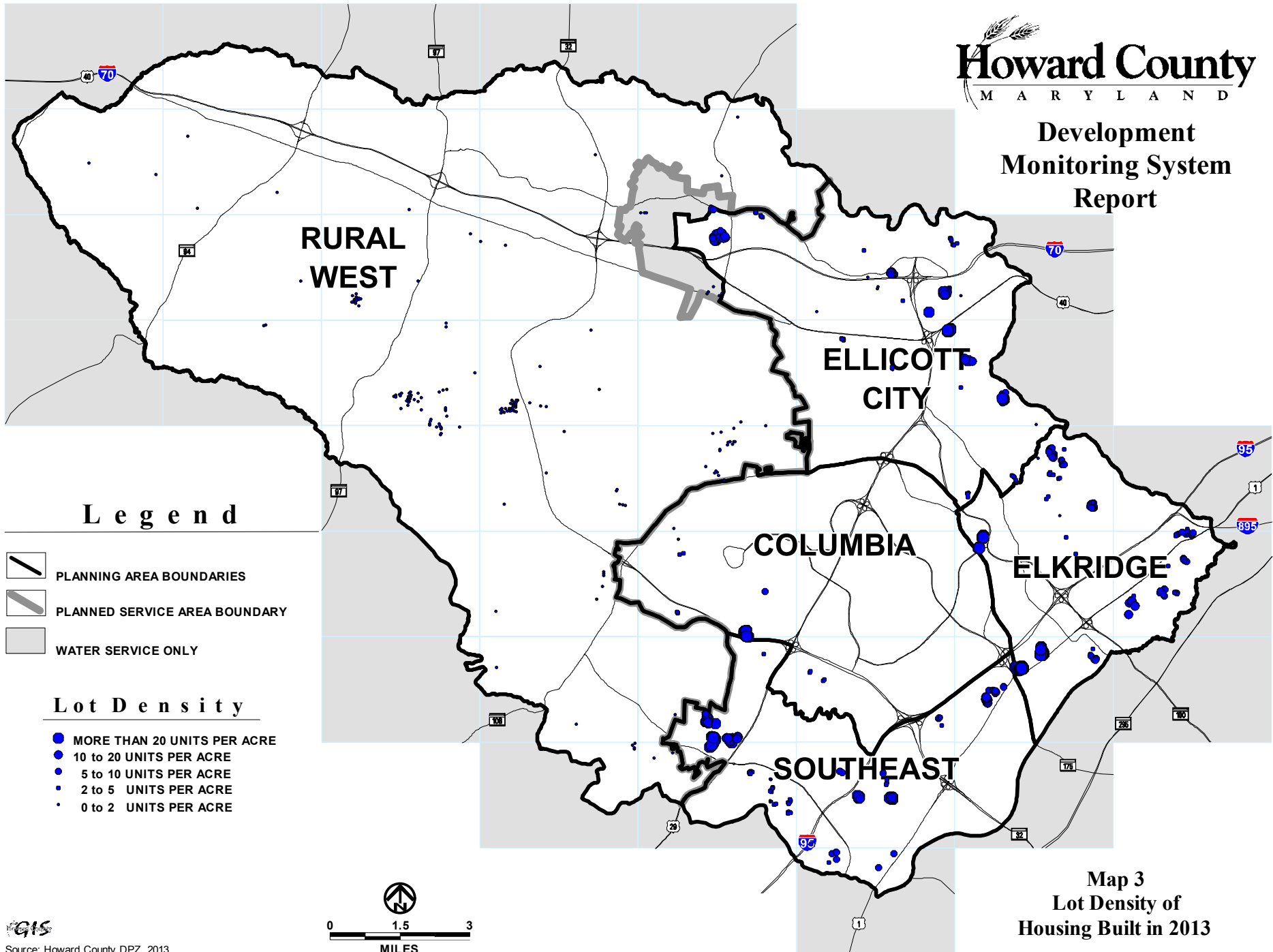
| Planning Area | Units | | Total Lot Acres | | Density - Units/Acre (Weighted Avg.) |
|--------------------|--------------|-------------|-----------------|-------------|--------------------------------------|
| | Number | Percent | Number | Percent | |
| Downtown Columbia | 0 | 0% | 0 | 0% | NA |
| All Other Columbia | 129 | 9% | 17 | 4% | 12.43 |
| Elkrigde | 353 | 24% | 44 | 9% | 20.26 |
| Ellicott City | 342 | 24% | 46 | 10% | 15.57 |
| Rural West | 160 | 11% | 328 | 68% | 0.88 |
| Southeast | 459 | 32% | 50 | 10% | 16.92 |
| TOTAL | 1,443 | 100% | 485 | 100% | 15.24 |

Table 2
Lot Density of Total Units Built in 2013 - Inside vs. Outside PFA

| Planning Area | Units | | Lot Acres | | Density - Units/Acre (Weighted Avg.) |
|---------------|--------------|-------------|------------|-------------|--------------------------------------|
| | Number | Percent | Number | Percent | |
| Inside PFA | 1,283 | 89% | 157 | 32% | 17.03 |
| Outside PFA | 160 | 11% | 328 | 68% | 0.88 |
| TOTAL | 1,443 | 100% | 485 | 100% | 15.24 |



**Development
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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, 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. To receive Green Neighborhood allocations, the project must meet both site and building design criteria for environmental sustainability. Green Neighborhood projects may be located anywhere in the County. 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 potentially reduces the annual number of units built outside the PFA, but also promotes more sustainable development within the County.

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% of all units countywide. The remaining 95% of units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2013 unit counts, 12.4% of all housing units in the County are outside the PFA. The remaining 87.6% are inside the PFA. This is summarized in Table 4.

Comparing this to the PlanHoward 2030 policy of allocating only 5% 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, from 12.4% currently to 10.6% in 2030.

Table 3
PlanHoward 2030 Growth Projections
2013 to 2030

| | | |
|--------------|---------------|---------------|
| Inside PFA | 33,380 | 95.0% |
| Outside PFA | 1,750 | 5.0% |
| Total | 35,130 | 100.0% |

Table 4
Total Built Units in Howard County
September 30, 2013

| | | |
|--------------|----------------|---------------|
| Inside PFA | 97,372 | 87.6% |
| Outside PFA | 13,813 | 12.4% |
| Total | 111,185 | 100.0% |

Table 5
Total Units by 2030 based on PlanHoward 2030

| | | |
|--------------|----------------|---------------|
| Inside PFA | 130,752 | 89.4% |
| Outside PFA | 15,563 | 10.6% |
| Total | 146,315 | 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 50 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. These higher density zones have been further increased with this year's adoption of the 2013 Comprehensive Zoning Plan. This zoning approach has created additional capacity in the east concentrating growth there rather 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 limiting 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 2013 were recorded or in existence prior to 2008, the first year of this current DMS analysis period. Therefore, units from 2013 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 Designated Places 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, 2013 through December 31, 2013, there was potential for 921 housing units from recorded lots countywide in 96 subdivision plans totaling 2,558 acres (Table 6). Ellicott City had the most with 304 units, 33% of the total. Columbia had 263 units, 29% of the total. The Southeast had potential for 141 units, 15% of the total. There were 127 units in recorded subdivision plans in Elkridge (14%) and 86 units in the Rural West (9%). 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 recordings.

Of the total 2,558 acres recorded, 1,682 acres, or about 66%, 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.

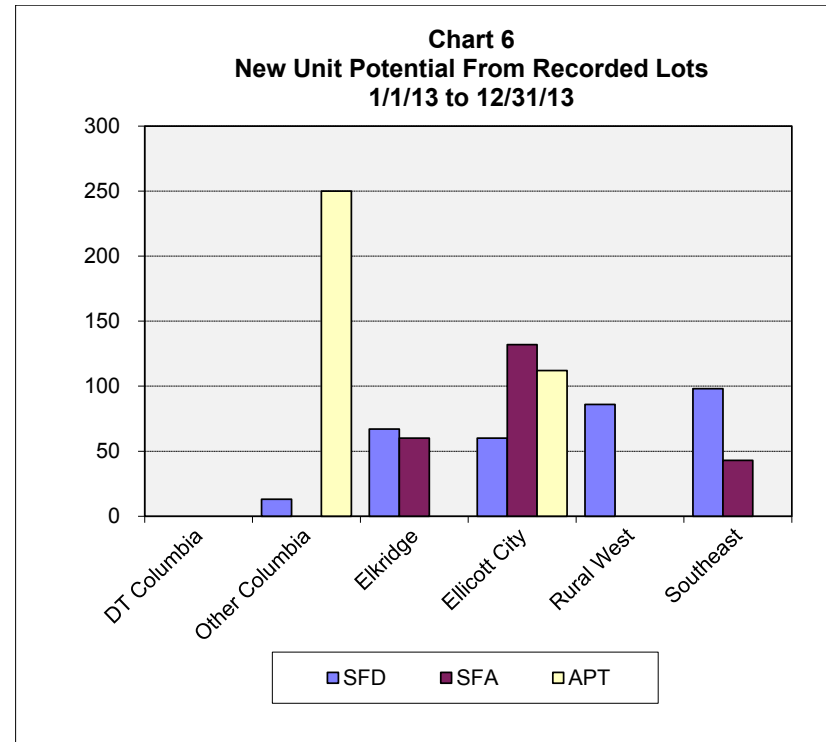
Table 7 shows new units from recorded lots by unit type. Of the 921 units from recorded lots, 324 are for single family detached units (SFD), 235 are for single family attached or townhouse units (SFA), and 362 are for apartment units (both rental and condo). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions, 1/01/13 to 12/31/2013

| Planning Area | Units | | Subdivision Plans | | Acreage | |
|--------------------|------------|-------------|-------------------|-------------|--------------|-------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Downtown Columbia | 0 | 0% | 0 | 0% | 0 | 0% |
| All Other Columbia | 263 | 29% | 9 | 9% | 43 | 2% |
| Elkridge | 127 | 14% | 25 | 26% | 184 | 7% |
| Ellicott City | 304 | 33% | 18 | 19% | 516 | 20% |
| Rural West | 86 | 9% | 34 | 35% | 1,682 | 66% |
| Southeast | 141 | 15% | 10 | 10% | 134 | 5% |
| TOTAL | 921 | 100% | 96 | 100% | 2,558 | 100% |

Table 7
Unit Potential from Recorded Lots by Unit Type, 1/01/13 to 12/31/2013

| Planning Area | SFD | SFA | APT | MH | TOTAL | PERCENT |
|--------------------|------------|------------|------------|-----------|-------------|-------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 | 0% |
| All Other Columbia | 13 | 0 | 250 | 0 | 263 | 29% |
| Elkridge | 67 | 60 | 0 | 0 | 127 | 14% |
| Ellicott City | 60 | 132 | 112 | 0 | 304 | 33% |
| Rural West | 86 | 0 | 0 | 0 | 86 | 9% |
| Southeast | 98 | 43 | 0 | 0 | 141 | 15% |
| TOTAL | 324 | 235 | 362 | 0 | 921 | 100% |
| PERCENT | 35% | 26% | 39% | 0% | 100% | |

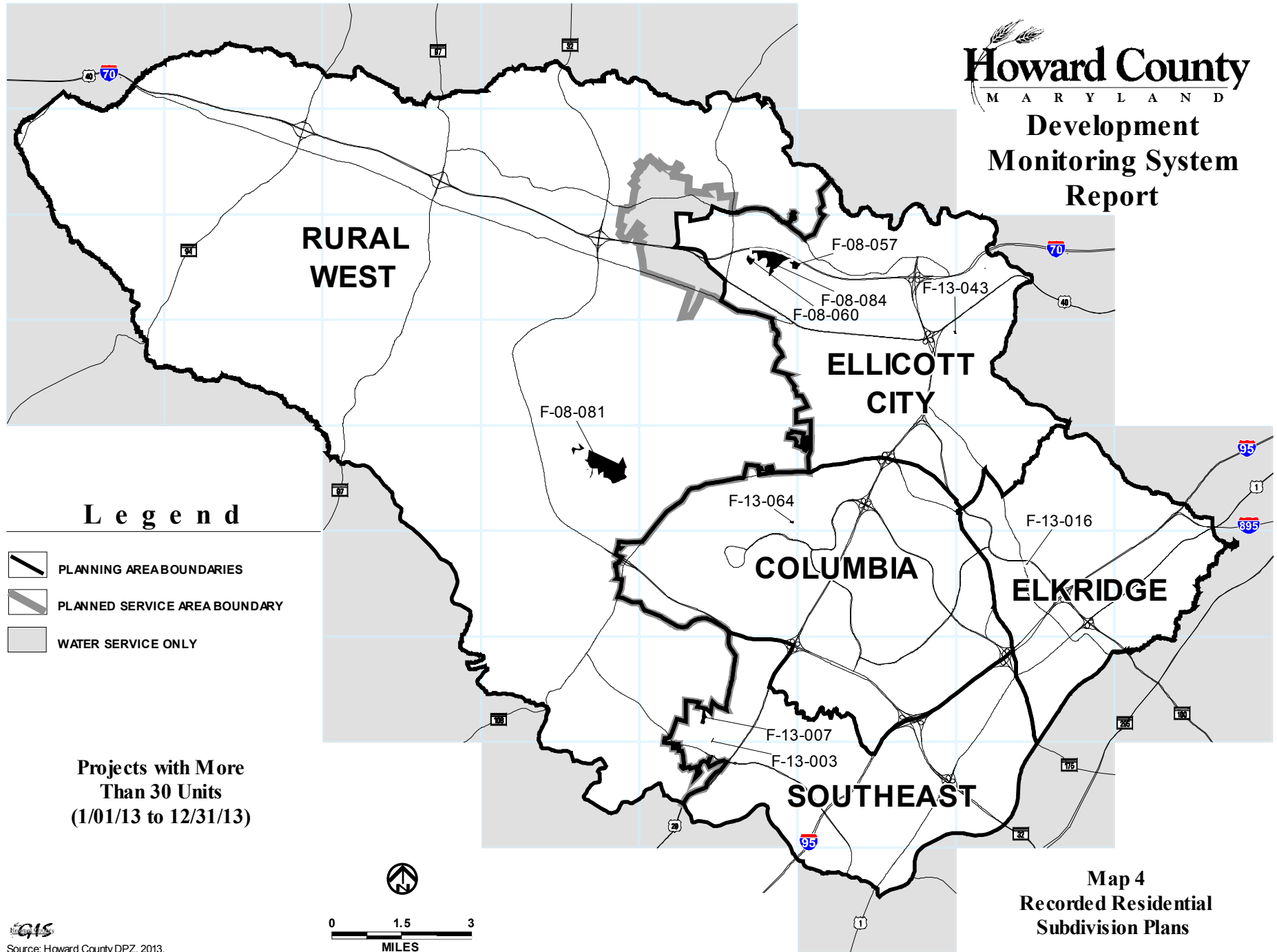


Last Year's Projects - Greater than 30 Units




Of the total 921 units from lots recorded for the latest reporting period, 710 or about 77% were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 8, are located in all planning areas except Downtown Columbia. The precise location of these plans are shown on Map 4.

These larger plans include the Village of Wilde Lake in Columbia; Fox Hunt Estates in Elkridge; Vantage Condos at Turf Valley, Ellicott Crossing Part 2, and the Villages at Turf Valley in Ellicott City; Walnut Creek in the Rural West and two subdivisions in Maple Lawn Farms in the Southeast.

Howard County
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Legend

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

Projects with More Than 30 Units (1/01/13 to 12/31/13)

Map 4
Recorded Residential
Subdivision Plans

Source: Howard County DPZ, 2013.

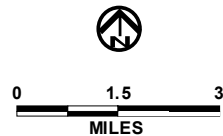


Table 8
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 1/01/13 to 12/31/13

| Planning Area | File Number | Plan Name | Unit Type | Units | Total |
|---------------|-------------|---------------------------------|-----------|-------|------------|
| Columbia | F-13-064 | Village of Wilde Lake | APT | 250 | 250 |
| Elkridge | F-13-016 | Fox Hunt Estates | SFA | 32 | 32 |
| Ellicott City | F-08-057 | Vantage Condos at Turf Valley | APT | 69 | |
| | F-13-043 | Ellicott Crossing - Part 2 | SFA | 81 | |
| | F-08-060 | Villages at Turf Valley | SFD & SFA | 62 | |
| | F-08-084 | Villages at Turf Valley - Ph. 2 | APT | 43 | |
| Rural West | F-08-081 | Walnut Creek | SFD | 45 | 45 |
| Southeast | F-13-003 | Maple Lawn Farms | SFA | 43 | |
| | F-13-007 | Maple Lawn Farms | SFD | 85 | |
| TOTAL | | | | | 710 |

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in October 1, 2008. (Note there is an extra quarter included due to the change in the analysis timeframe.) Over this time period lots for 4,867 units countywide in 517 subdivision plans totaling 10,711 acres were recorded. This equates to an annual average of 927 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 1,584 single family detached units, 33% of the total 4,867. A total of 1,666, 34%, were for single family attached units and the remaining 1,617, 33%, were for apartments units (rental and condo).

Table 9
Recorded Residential Subdivisions, 10/01/08 to 12/31/13

| Year | Units | Plans | Acreage |
|--------------------|--------------|------------|---------------|
| 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 |
| 1/13 to 12/13 | 921 | 96 | 2,558 |
| TOTAL | 4,867 | 517 | 10,711 |
| ANNUAL AVG. | 927 | 98 | 2,040 |

* Extra quarter included due to change in analysis timeframe

Table 10
Unit Potential From Recorded Lots by Unit Type, 10/01/08 to 12/31/13

| Year | SFD | SFA | APT | MH | Total |
|--------------------|--------------|--------------|--------------|-----------|--------------|
| 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 |
| 1/13 to 12/13 | 324 | 235 | 362 | 0 | 921 |
| TOTAL | 1,584 | 1,666 | 1,617 | 0 | 4,867 |
| PERCENT | 33% | 34% | 33% | 0% | 100% |
| ANNUAL AVG. | 302 | 317 | 308 | 0 | 927 |

* 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, 2013 are tabulated and compared with those in process the prior year (as of December 31, 2012).

Number of Plans

The same number of residential plans were in process as of December 31, 2013 as there were one year earlier – 182 plans in both 2013 and 2012 (Table 11).

For the current year, the Rural West had the greatest number of residential plans in process with 62, followed by Ellicott City with 51. Elkridge and the Southeast had 35 and 28 plans in process, respectively. Columbia had 6 plans in process.

Of the 182 plans in process on December 31, 2013, 118 were final plans, 30 were environmental concept plans, 17 were sketch plans, 13 were preliminary equivalent sketch plans and 4 were preliminary plans.

Number of Potential Units

There were 671 more units in process on December 31, 2013 compared to the previous year – 7,740 units compared to 7,069 units (Table 12).

It is important to note that a significant number of the 7,740 potential units in process are part of phased projects with building planned for future

Table 11
Number of Residential Subdivision Plans in Process, 12/31/13
(With comparisons to Countywide total as of 12/31/12)

| Planning Area | Environmental | | Preliminary Equivalent | | | TOTAL PLANS |
|-----------------------|---------------|-----------|------------------------|-------------|------------|-------------|
| | Concept | Sketch | Sketch | Preliminary | Final | |
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 2 | 0 | 1 | 0 | 3 | 6 |
| Elkridge | 3 | 7 | 1 | 2 | 22 | 35 |
| Ellicott City | 11 | 8 | 3 | 0 | 29 | 51 |
| Rural West | 12 | 0 | 7 | 0 | 43 | 62 |
| Southeast | 2 | 2 | 1 | 2 | 21 | 28 |
| TOTAL | 30 | 17 | 13 | 4 | 118 | 182 |
| As of 12/31/12 | 29 | 15 | 20 | 3 | 115 | 182 |

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, 6,008 units are part of phased plans, with building planned as far out as 2020. Phased plans represent 78% of the total units in process.

The larger phased projects include Maple Lawn Farms, Laurel Park Station and Annapolis Junction 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, 20% of the units in process are single family detached units. About 22% are single family attached units and 58% 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, 12/31/13
 (With comparisons to Countywide total as of 12/31/12)

| Planning Area | Single Family Detached | Single Family Attached | Apartments | Mobile Homes | TOTAL UNITS |
|-----------------------|------------------------|------------------------|--------------|--------------|--------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 15 | 0 | 0 | 0 | 15 |
| Elkridge | 117 | 688 | 2,785 | 0 | 3,590 |
| Ellicott City | 553 | 695 | 253 | 0 | 1,501 |
| Rural West | 370 | 0 | 0 | 0 | 370 |
| Southeast | 499 | 323 | 1,442 | 0 | 2,264 |
| TOTAL | 1,554 | 1,706 | 4,480 | 0 | 7,740 |
| PERCENT | 20% | 22% | 58% | 0% | 100% |
| As of 12/31/12 | 1,626 | 1,561 | 3,882 | 0 | 7,069 |

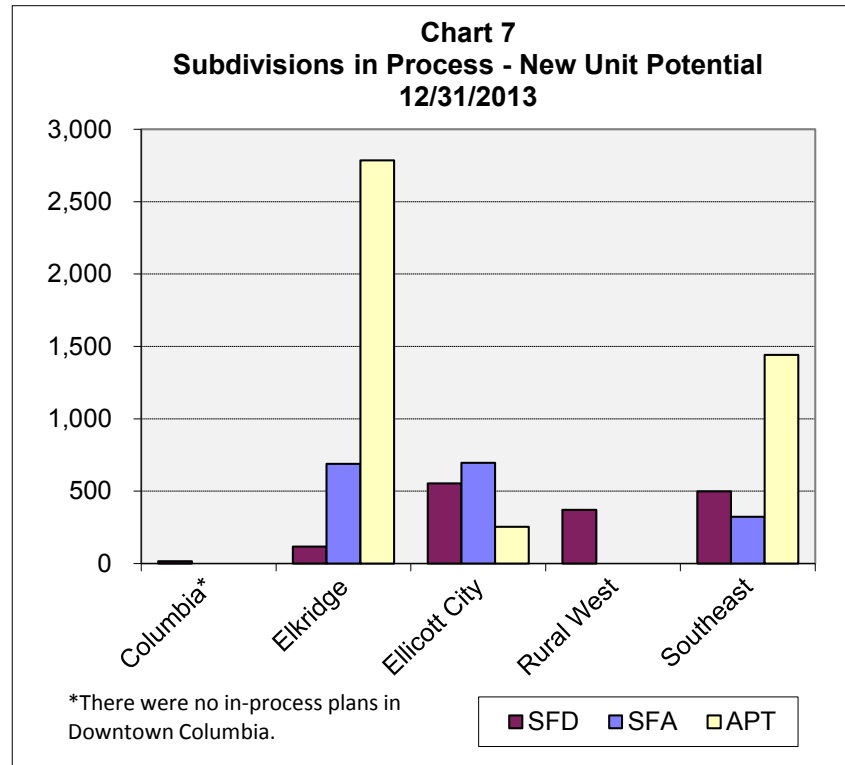


Table 13
Potential Units from Phased Projects

| Planning Area | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | TOTAL |
|--------------------|------------|--------------|--------------|--------------|------------|------------|------------|--------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Elkridge | 25 | 383 | 669 | 661 | 521 | 495 | 416 | 3,170 |
| Ellicott City | 145 | 239 | 125 | 125 | 125 | 150 | 148 | 1,057 |
| Southeast | 208 | 359 | 330 | 291 | 250 | 250 | 0 | 1,688 |
| Rural West | 0 | 45 | 48 | 0 | 0 | 0 | 0 | 93 |
| TOTAL | 378 | 1,026 | 1,172 | 1,077 | 896 | 895 | 564 | 6,008 |

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, 12/31/13

| 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 | 0 | 0 | 0 |
| Elkridge | 19 | 337 | 2,785 | 0 | 3,141 | 3 | 0 | 0 | 0 | 3 |
| Ellicott City | 133 | 433 | 253 | 0 | 819 | 286 | 33 | 0 | 0 | 319 |
| Rural West | 0 | 0 | 0 | 0 | 0 | 135 | 0 | 0 | 0 | 135 |
| Southeast | 15 | 35 | 774 | 0 | 824 | 18 | 16 | 0 | 0 | 34 |
| TOTAL | 167 | 805 | 3,812 | 0 | 4,784 | 442 | 49 | 0 | 0 | 491 |

| Planning Area | Preliminary | | | | | Final | | | | | TOTAL - 12/31/13 | | | | |
|--------------------|-------------|----------|------------|----------|------------|------------|------------|------------|----------|--------------|------------------|--------------|--------------|----------|--------------|
| | 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 | 15 | 0 | 0 | 0 | 15 | 15 | 0 | 0 | 0 | 15 |
| Elkridge | 0 | 0 | 0 | 0 | 0 | 95 | 351 | 0 | 0 | 446 | 117 | 688 | 2,785 | 0 | 3,590 |
| Ellicott City | 0 | 0 | 0 | 0 | 0 | 134 | 229 | 0 | 0 | 363 | 553 | 695 | 253 | 0 | 1,501 |
| Rural West | 0 | 0 | 0 | 0 | 0 | 235 | 0 | 0 | 0 | 235 | 370 | 0 | 0 | 0 | 370 |
| Southeast | 45 | 0 | 252 | 0 | 297 | 421 | 272 | 416 | 0 | 1,109 | 499 | 323 | 1,442 | 0 | 2,264 |
| TOTAL | 45 | 0 | 252 | 0 | 297 | 900 | 852 | 416 | 0 | 2,168 | 1,554 | 1,706 | 4,480 | 0 | 7,740 |

Number of Acres

As of December 31, 2013 a total of 4,692 acres of residential land were in the subdivision process. This is 458 more acres compared to the previous year, at which time there were 4,234 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 Oxford Square, The Overlook at Blue Stream, Howard Square, Turf Valley, Laurel Park Station and Annapolis Junction. These major projects with 50 or more units total 6,997 units which account for about 90% of the total 7,740 units in the subdivision process.

Table 15
Acreeage of Residential Subdivision Plans in Process, 12/31/13
(With comparisons to Countywide total as of 12/31/12)

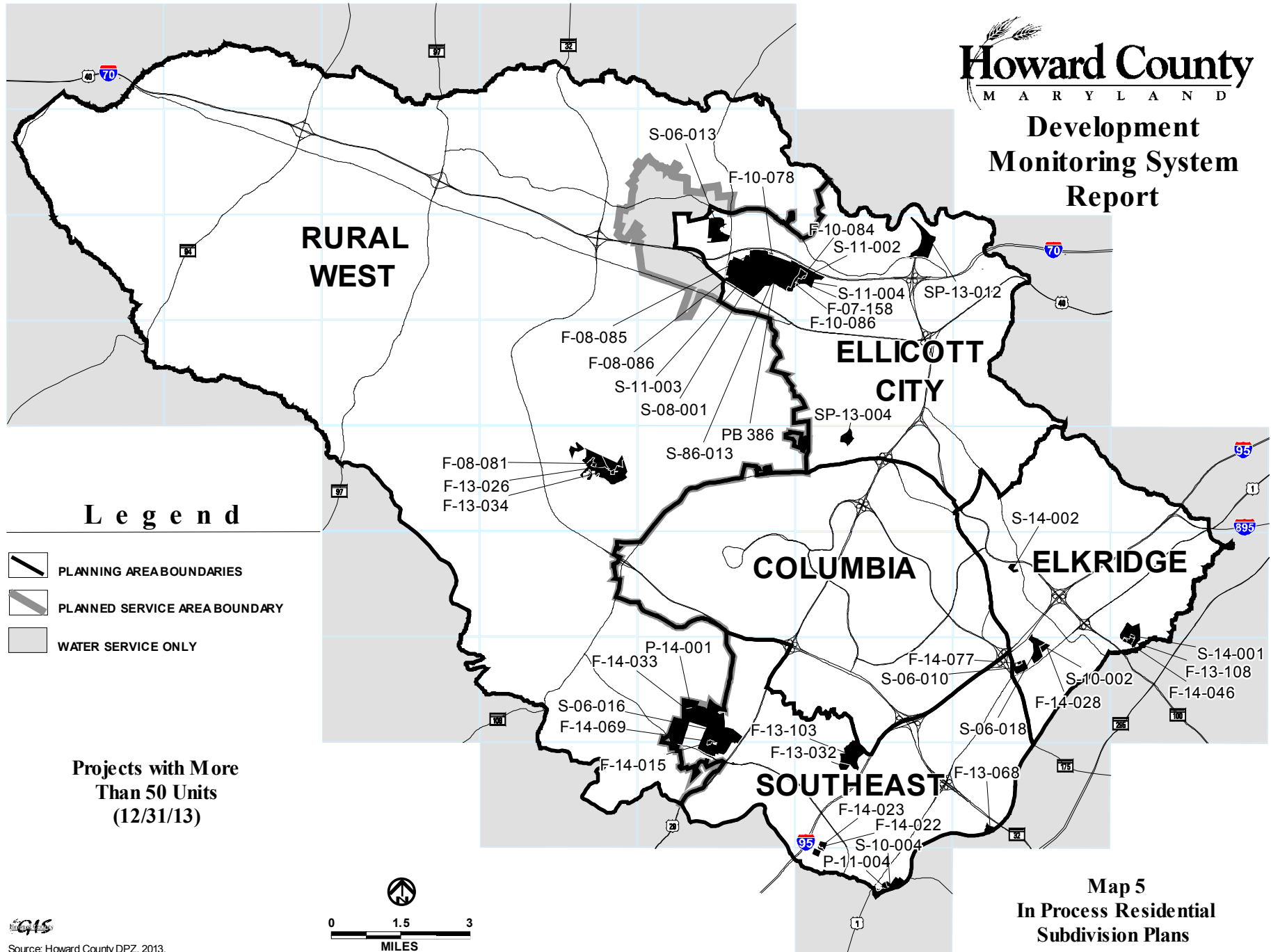
| Planning Area | Preliminary Equivelent | | | | TOTAL ACRES |
|-----------------------|------------------------|------------|-------------|--------------|--------------|
| | Sketch | Sketch | Preliminary | Final | |
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 0 | 5 | 0 | 10 | 15 |
| Elkridge | 235 | 1 | 151 | 201 | 589 |
| Ellicott City | 296 | 180 | 0 | 423 | 899 |
| Rural West | 0 | 536 | 0 | 1,580 | 2,116 |
| Southeast | 654 | 9 | 39 | 371 | 1,073 |
| TOTAL | 1,185 | 732 | 190 | 2,585 | 4,692 |
| As of 12/31/12 | 807 | 660 | 108 | 2,659 | 4,234 |

**Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/13**

| Region | File Number | Plan Name | Unit Type | Units | TOTAL |
|---------------|--|--|---------------------------|--------------|--------------|
| Elkridge | S-14-001, F-13-108, F-14-046 | Oxford Square | APT - 143 MIHU | 1,492 | 3,440 |
| | S-06-018 | The Overlook at Blue Stream - Remaining Phases | SFA, APT - 178 MIHU | 966 | |
| | S-06-010, F-14-077 | Howard Square - Remaining Phases | SFA, APT | 528 | |
| | S-14-002 | The Park at Locust Thicket | APT | 270 | |
| | S-10-002, F-14-028 | Morris Place | SFA - 28 MIHU | 184 | |
| Ellicott City | S-86-013, PB 386 | Turf Valley - Remaining Phases | SFD, SFA, APT | 342 | 1,299 |
| | SP-13-012 | The Estates at Patapsco Park | SFD | 195 | |
| | S-08-001 | Turf Valley Clubhouse | SFD, SFA, APT | 128 | |
| | F-08-85,-86/F-10-078 | Villages at Turf Valley | SFD, SFA | 114 | |
| | S-11-002 | The Bluffs at Turf Valley | APT | 114 | |
| | F-10-084/F-10-086/F-07-158 | Fairways at Turf Valley | SFD, SFA | 98 | |
| | SP-13-004 | Mason Property | SFD | 91 | |
| | 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 | |
| | S-11-003 | Turf Valley Clubhouse II | SFD, SFA | 53 | |
| Rural West | F-08-081/F-13-026/F-13-034 | Walnut Creek - Phases 3 & 4 | SFD | 93 | 93 |
| Southeast | S-10-004/P-11-004 | Laurel Park Station - All Phases | APT - 150 MIHU | 1,000 | 2,165 |
| | F-13-068 | Annapolis Junction Town Center | APT - 32 MIHU | 416 | |
| | S-06-016/P-14-001/F-14-069/F-14-033/F-14-015 | Maple Lawn Farms - Phases 9 to 12 | SFD, SFA, APT | 307 | |
| | F-13-103 | Wincopia Farms | SFD, SFA | 220 | |
| | F-14-022, F-14-023 | Deer Springs | SFD, SFA | 129 | |
| | F-13-032 | Walden Woods | SFA, SFD - Age Restricted | 93 | |
| TOTAL | | | | | 6,997 |

Howard County MARYLAND

Development Monitoring System Report



Source: Howard County DPZ, 2013.



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 01/01/2013 thru 12/31/2013 there were 2,066 housing units approved in 56 site development plans totaling about 297 acres (Table 17). Ellicott City had 685 approved units followed by Columbia with 616 units, Downtown Columbia with 380, Elkridge with 226, and the Southeast with 159.

Table 18 shows new units from approved site development plans by unit type. Of the 2,066 approved units, 17% were for single family detached units, 16% were for single family attached or townhouse units and 67% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 18
Approved Units from SDP's by Unit Type, 1/01/13 to 12/31/13

| Planning Area | SFD | SFA | APT | MH | TOTAL | PERCENT |
|--------------------|------------|------------|--------------|-----------|--------------|------------|
| Downtown Columbia | 0 | 0 | 380 | 0 | 380 | 18% |
| All Other Columbia | 26 | 0 | 590 | 0 | 616 | 30% |
| Elkridge | 75 | 119 | 32 | 0 | 226 | 11% |
| Ellicott City | 135 | 160 | 390 | 0 | 685 | 33% |
| Rural West | 0 | 0 | 0 | 0 | 0 | 0% |
| Southeast | 116 | 43 | 0 | 0 | 159 | 8% |
| TOTAL | 352 | 322 | 1,392 | 0 | 2,066 | 82% |
| PERCENT | 17% | 16% | 67% | 0% | 100% | |

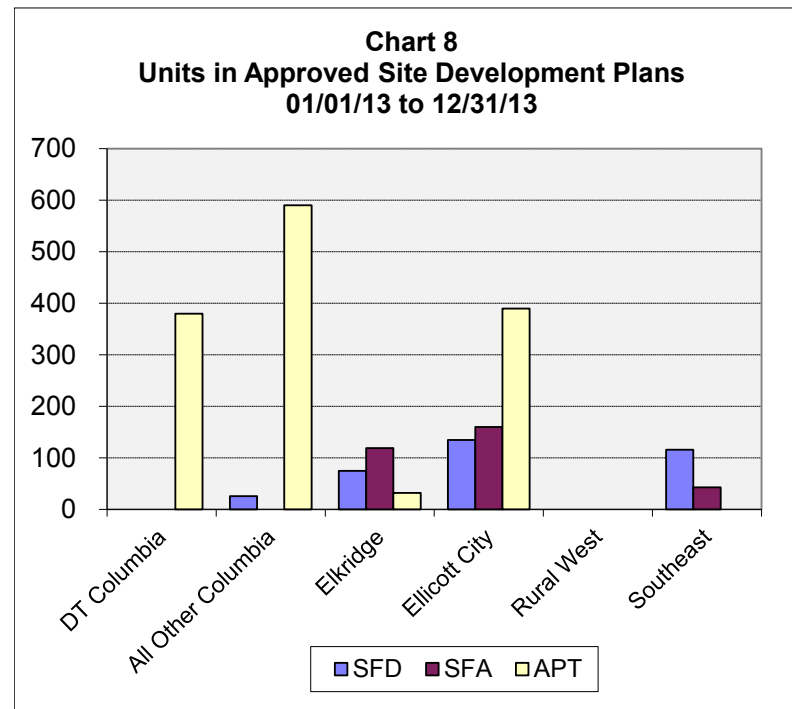


Table 17
Approved Residential Site Development Plans, 1/01/13 to 12/31/13

| Planning Area | Units | | Site Dev. Plans | | Acreage | |
|--------------------|--------------|------------|-----------------|------------|------------|------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Downtown Columbia | 380 | 18% | 1 | 2% | 5 | 2% |
| All Other Columbia | 616 | 30% | 8 | 14% | 47 | 16% |
| Elkridge | 226 | 11% | 15 | 27% | 36 | 12% |
| Ellicott City | 685 | 33% | 16 | 29% | 150 | 51% |
| Rural West | 0 | 0% | 1 | 2% | 21 | 7% |
| Southeast | 159 | 8% | 15 | 27% | 38 | 13% |
| TOTAL | 2,066 | 82% | 56 | 98% | 297 | 98% |

Last Year's Projects - Greater than 30 Units

Of the total 2,066 units approved in site development plans last year, 1,844 or about 89% were in part of projects consisting of more than 30 units. These larger projects, shown in Table 19, are located in all five 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, 2008 to December 31, 2013. Over this five and a quarter year period 6,441 units were approved countywide in 272 site development plans totaling about 1,371 acres.

The last reporting period saw a marked increase in approved units compared to the previous period - 2,066 versus 1,667 units approved.

Table 19
Approved Residential SDP's, Projects With More Than 30 Units, 1/01/13 to 12/31/13

| Region | File Number | Plan Name | Unit Type | Units | TOTAL |
|--------------------|--|------------------------------------|------------------------------------|-------|--------------|
| Downtown Columbia | SDP-13-007 | Warfield - Phase 1 | APT | 380 | 380 |
| All Other Columbia | SDP-13-002 | Paragon at Gateway Overlook | APT | 320 | 570 |
| | SDP-13-046 | Village of Wilde Lake | APT | 250 | |
| Elkridge | SDP-12-061 | Shipley's Grant | SFA - 4 MIHU | 87 | 151 |
| | SDP-07-007 | Fox Hunt Estates | SFA - 4 MIHU | 32 | |
| | SDP-12-045 | Shipley's Grant | APT | 32 | |
| Ellicott City | SDP-08-075 | Lutheran Village at Miller's Grant | Age-Restricted SFD & APT - 29 MIHU | 284 | 614 |
| | SDP-12-038 | The Gatherings at Ellicott Mills | Age-Restricted SFA & APT - 13 MIHU | 127 | |
| | SDP-13-004 | Ellicott Crossing, Part 2 | SFA - 12 MIHU | 81 | |
| | SDP-10-026 | Villages at Turf Valley | SFD, SFA | 62 | |
| | SDP-08-032 | Vantage Condos at Turf Valley | APT | 60 | |
| Southeast | SDP-13-086 & 087, SDP-14-001 & 002, SDP-13-090 | | Maple Lawn Farms | SFD | 86 |
| | SDP-13-071 & 072 | | Maple Lawn Farms | SFA | 43 |
| TOTAL | | | | | 1,844 |

Table 20
Approved Units in Residential Site Development Plans, 10/01/08 to 12/31/13

| Year | SFD | SFA | APT | MH | Total |
|--------------------|--------------|--------------|--------------|-----------|--------------|
| 10/08 to 9/09 | 261 | 156 | 159 | 0 | 576 |
| 10/09 to 12/10 * | 413 | 572 | 324 | 0 | 1,309 |
| 1/11 to 12/11 | 279 | 322 | 222 | 0 | 823 |
| 1/12 to 12/12 | 342 | 584 | 741 | 0 | 1,667 |
| 1/13 to 12/13 | 352 | 322 | 1,392 | 0 | 2,066 |
| TOTAL | 1,647 | 1,956 | 2,838 | 0 | 6,441 |
| PERCENT | 26% | 30% | 44% | 0% | 100% |
| ANNUAL AVG. | 314 | 373 | 541 | 0 | 1,227 |

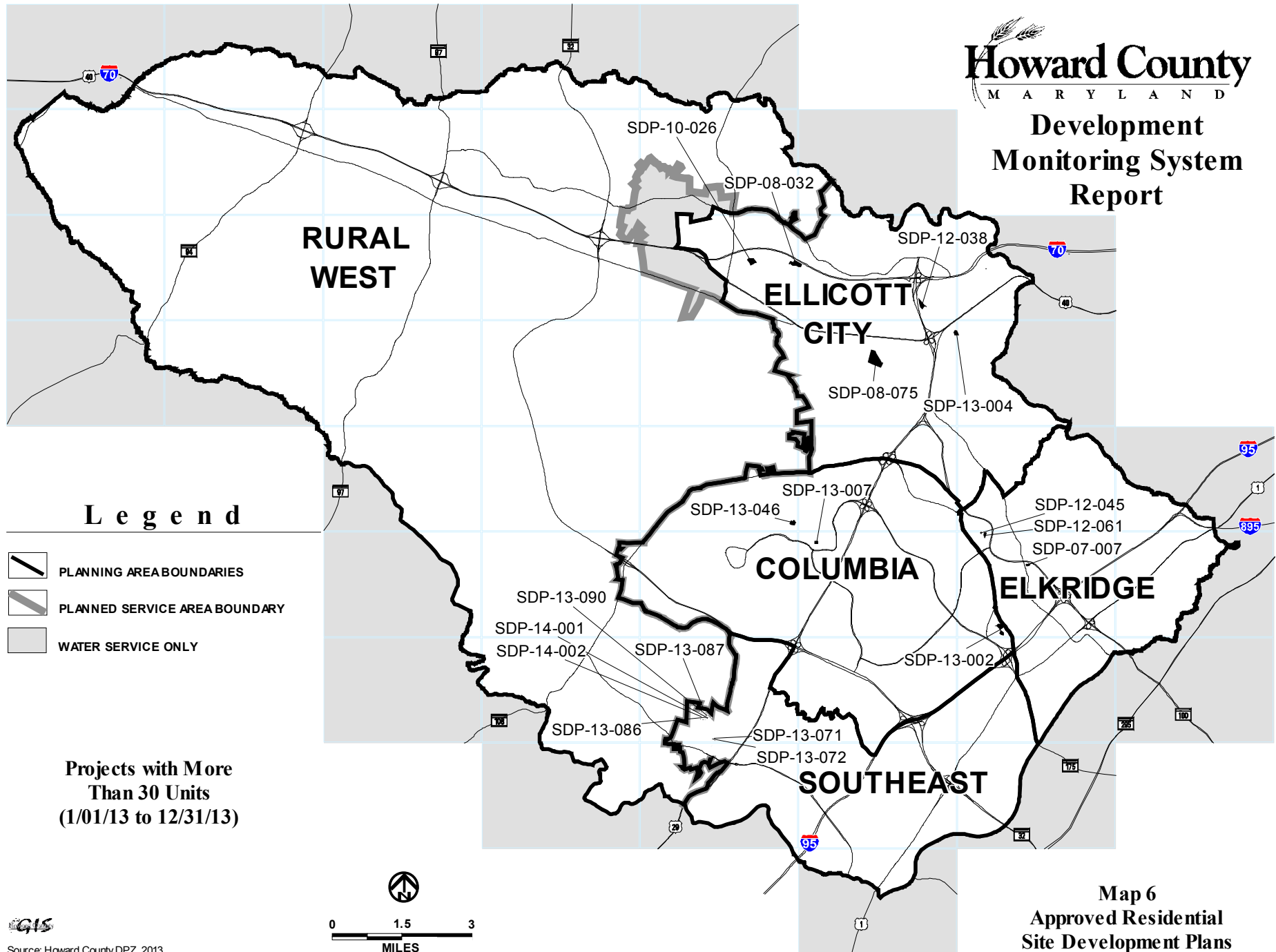
* Extra quarter included due to change in analysis timeframe

Table 21
Approved Residential Site Development Plans, 10/01/08 to 12/31/13

| Year | Units | Plans | Acreage |
|--------------------|--------------|------------|--------------|
| 10/08 to 9/09 | 576 | 47 | 154 |
| 10/09 to 12/10 * | 1,309 | 72 | 433 |
| 1/11 to 12/11 | 823 | 42 | 175 |
| 1/12 to 12/12 | 1,667 | 55 | 312 |
| 1/13 to 12/13 | 2,066 | 56 | 297 |
| TOTAL | 6,441 | 272 | 1,371 |
| ANNUAL AVG. | 1,227 | 52 | 261 |

* Extra quarter included due to change in analysis timeframe

**Development
Monitoring System
Report**



Source: Howard County DPZ, 2013.

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, 2013 are tabulated and compared to those in process a year earlier (as of December 31, 2012). 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 16 more residential site development plans in process as of December 31, 2013 compared to the prior reporting period, 59 plans compared to 43 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 1/1/12 & 12/31/13

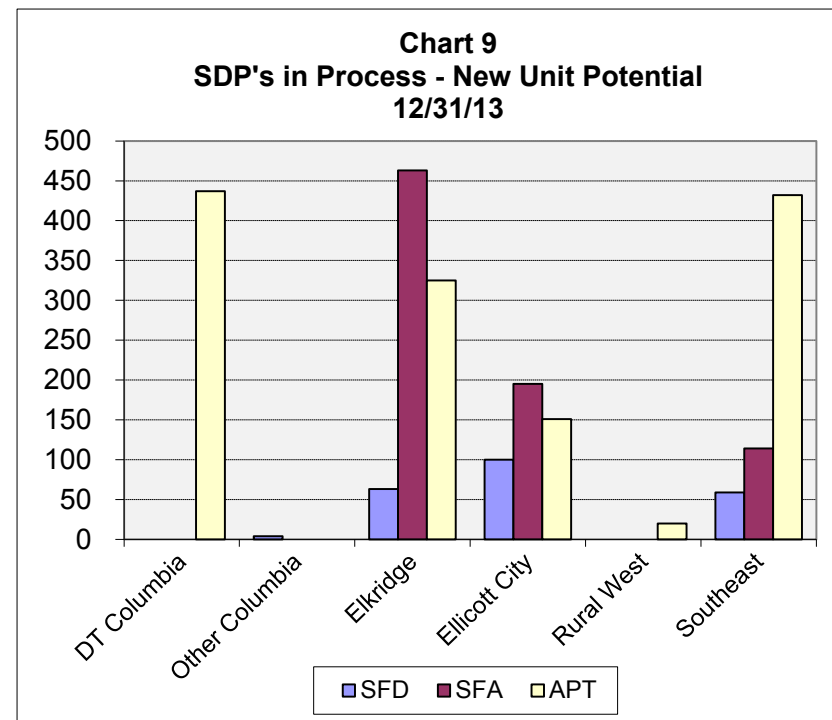
| Planning Area | 2013 | 2012 |
|--------------------|-----------|-----------|
| Downtown Columbia | 1 | 1 |
| All Other Columbia | 4 | 5 |
| Elkridge | 22 | 12 |
| Ellicott City | 17 | 20 |
| Rural West | 2 | 0 |
| Southeast | 13 | 5 |
| TOTAL | 59 | 43 |

Number of Potential Units

There were 272 more units in process as of December 31, 2013 compared to December 31 of the previous year, 2,363 units compared to 2,091 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 1,365 proposed units in 2013. This is followed by 772 proposed single family attached or townhouse units and 226 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, 12/31/13
(With comparisons to Countywide total as of 12/31/12)

| Planning Area | Single Family Detached | Single Family Attached | Apartments | Mobile Homes | TOTAL UNITS |
|-----------------------|------------------------|------------------------|--------------|--------------|--------------|
| Downtown Columbia | 0 | 0 | 437 | 0 | 437 |
| All Other Columbia | 4 | 0 | 0 | 0 | 4 |
| Elkridge | 63 | 463 | 325 | 0 | 851 |
| Ellicott City | 100 | 195 | 151 | 0 | 446 |
| Rural West | 0 | 0 | 20 | 0 | 20 |
| Southeast | 59 | 114 | 432 | 0 | 605 |
| TOTAL | 226 | 772 | 1,365 | 0 | 2,363 |
| As of 12/31/11 | 243 | 598 | 1,250 | 0 | 2,091 |



Number of Acres

As of December 31, 2013 a total of 381 acres of residential land were in the site development plan process. This is slightly more than the previous year when there were 375 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 2,363 units in the site development plan process, 2,117 or about 90% were in projects with more than 30 units.

Some of the larger projects include the Warfield Phase 2 in Downtown Columbia, Oxford Square Blue Stream Towns, Waverly Woods West Apartments and Annapolis Junction Town Center.

Table 24
Acreeage of Residential SDP's In Process, 12/31/13 & 12/31/12

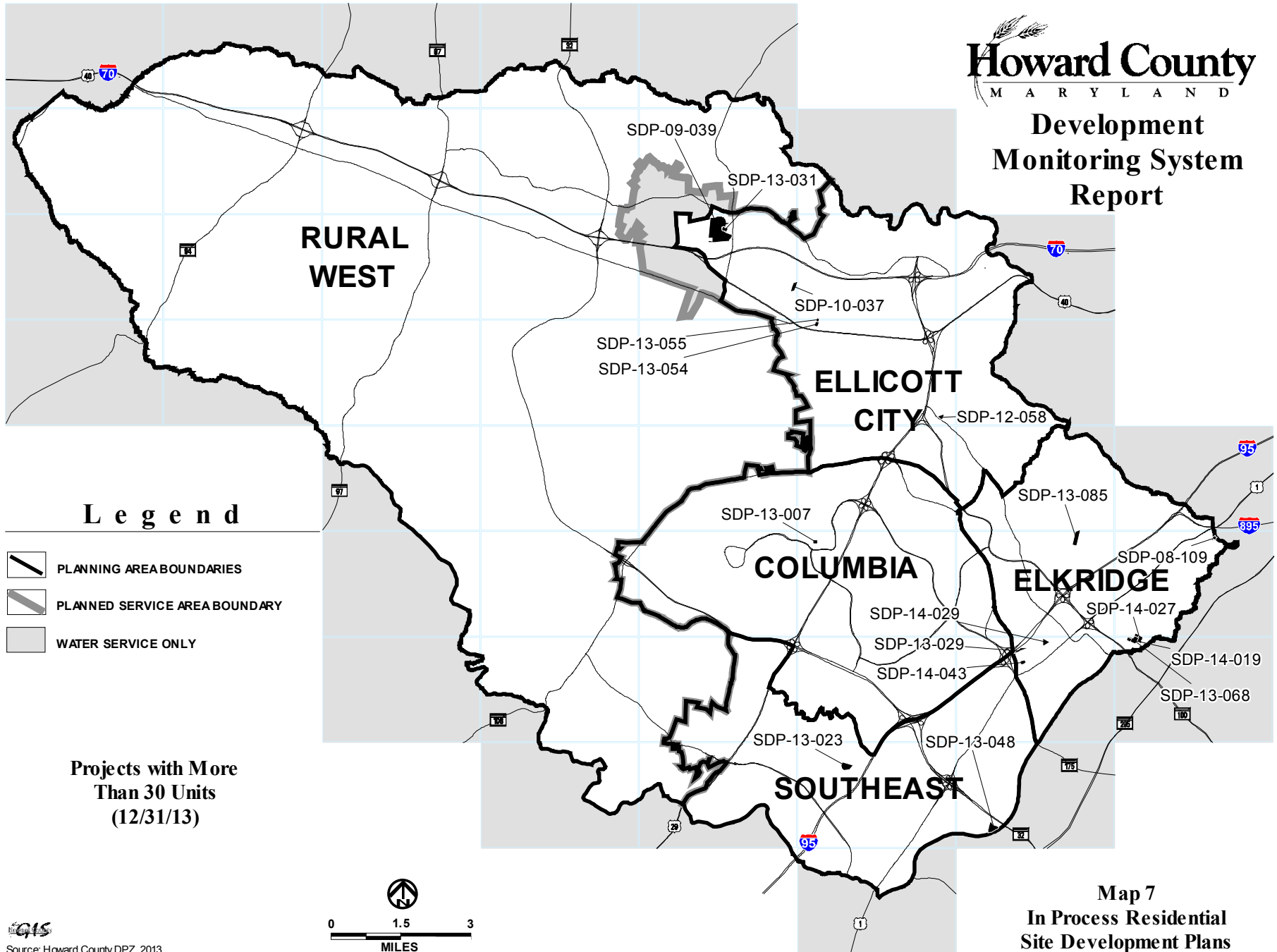
| Planning Area | 2013 | 2012 |
|--------------------|------------|------------|
| Downtown Columbia | 5 | 5 |
| All Other Columbia | 2 | 28 |
| Elkridge | 119 | 38 |
| Ellicott City | 146 | 270 |
| Rural West | 37 | 0 |
| Southeast | 71 | 34 |
| TOTAL | 381 | 375 |

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/13




| Region | File Number | Plan Name | Unit Type | Units | TOTAL |
|-------------------|-------------|---|-------------------------------------|-------|--------------|
| Downtown Columbia | SDP-13-007 | Warfield, Phase II | APT | 437 | 437 |
| Elkridge | SDP-14-027 | Oxford Square - Woodfield | APT | 196 | |
| | SDP-14-029 | Blue Stream Towns | SFA - 19 MIHU | 103 | |
| | SDP-14-043 | Howard Square | SFA - 24 MIHU | 101 | |
| | SDP-13-068 | Oxford Square | SFA - 13 MIHU | 101 | |
| | SDP-14-019 | Oxford Square | SFA - 13 MIHU | 96 | |
| | SDP-13-029 | Deep Falls | APT - 55 MIHU | 80 | |
| | SDP-08-109 | Riverwatch | APT - 12 MIHU | 47 | |
| | SDP-13-085 | Enclave at Park Forest | SFA - Age Restricted - 5 MIHU | 45 | |
| Ellicott City | SDP-13-031 | Waverly Woods West Apartments | APT - Age Restricted - 12 MIHU | 112 | |
| | SDP-09-039 | Waverly Woods - Courtyards West - Ph. 5 | SFD, SFA - Age Restricted | 90 | |
| | SDP-13-054 | Towns at Patuxent Orchard | SFA - 7 MIHU | 71 | |
| | SDP-10-037 | Fairways at Turf Valley | SFA | 47 | |
| | SDP-13-055 | Orchard Park - Section 3 | APT - 4 MIHU | 39 | |
| | SDP-12-058 | Long Gate Overlook | SFA - 5 MIHU | 39 | |
| Southeast | SDP-13-048 | Annapolis Junction Town Center | APT - 32 MIHU | 416 | |
| | SDP-13-023 | Walden Woods | SFD, SFA - Age Restricted - 10 MIHU | 97 | |
| TOTAL | | | | | 2,117 |

Howard County M A R Y L A N D

Development Monitoring System Report



Legend

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

**Projects with More
Than 30 Units
(12/31/13)**



Source: Howard County DPZ, 2013.

**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 planning area.

Issued Building Permits

Summary of Last Year

From January 1, 2013 to December 31, 2013, the County issued 2,317 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.

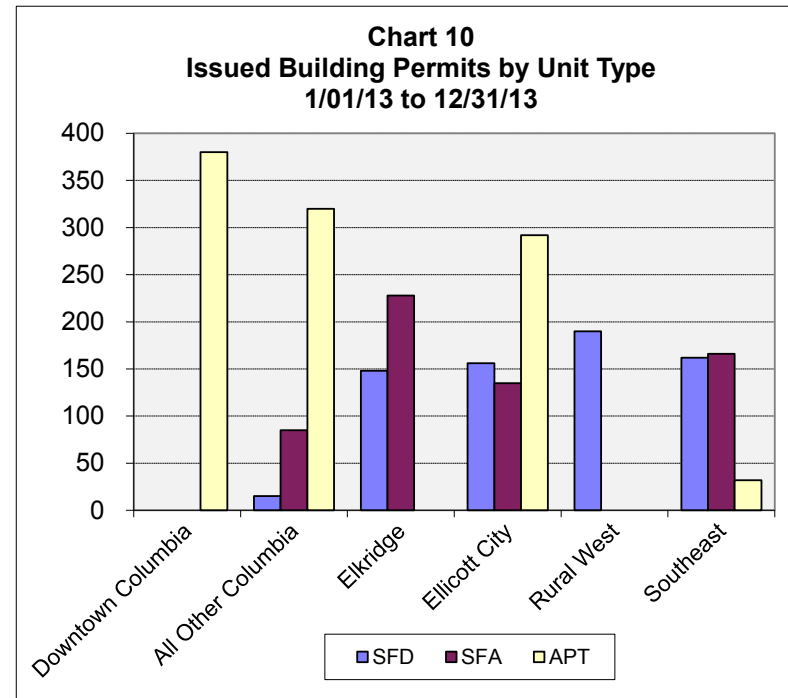


Table 26
Issued Residential Building Permits by Unit Type, 1/01/13 to 12/31/13

| Planning Area | SFD | SFA | APT | MH | TOTAL | PERCENT |
|--------------------|------------|------------|--------------|-----------|--------------|------------|
| Downtown Columbia | 0 | 0 | 380 | 0 | 380 | 16% |
| All Other Columbia | 15 | 85 | 320 | 0 | 420 | 18% |
| Elkridge | 148 | 228 | 0 | 0 | 376 | 16% |
| Ellicott City | 156 | 135 | 292 | 0 | 583 | 25% |
| Rural West | 190 | 0 | 0 | 0 | 190 | 8% |
| Southeast | 162 | 166 | 32 | 8 | 368 | 16% |
| TOTAL | 671 | 614 | 1,024 | 8 | 2,317 | 84% |
| PERCENT | 29% | 26% | 44% | 0% | 100% | |

Last Year's Projects - Greater than 25 Units

Table 27 summarizes the issued residential building permits in larger developments with more than 25 units. About 77%, or 1,776 of the total 2,317 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, 2008 to December 31, 2013, a total of 8,221 residential permits have been issued in Howard County (Table 28). This is an average of 1,644 permits per year. Last year's 2,317 issued permits was 39% greater than the 1,662 permits issued the year before and the most of the last 5 years. In fact, it was the most issued since 1999 when there were 2,367 permits issued.

Of the 8,221 total permits issued over the 5 and a quarter year time period, 2,644, or 32%, were for single family detached units. There were 2,509 permits (31%) for single family attached units and 3,049 permits (37%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

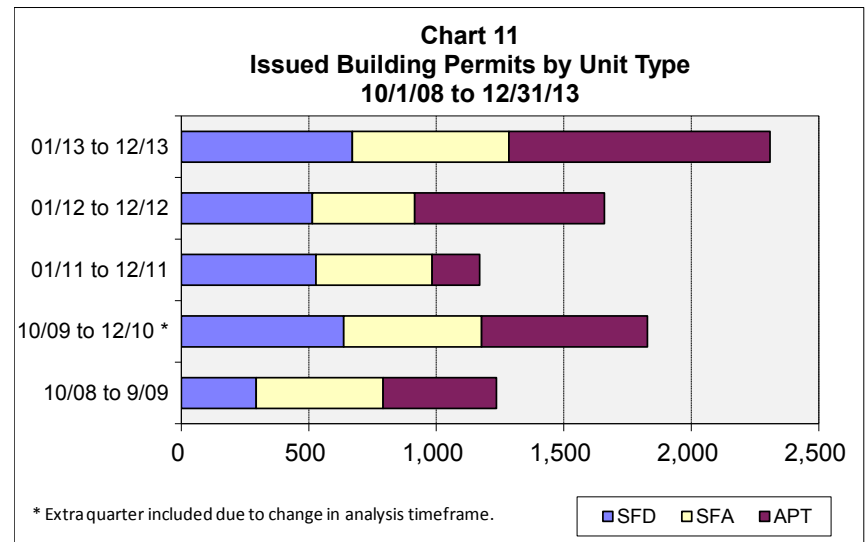
Table 27
Issued Residential Building Permits in Subdivisions with More than 25 Units, 1/01/13 to 12/31/13

| Planning Area | Subdivision | Unit Type | Units | TOTAL |
|--------------------|----------------------------------|---|-------|--------------|
| Downtown Columbia | Warfield Phase I | Apartments | 380 | 380 |
| All Other Columbia | Benson East | Apartments | 320 | 404 |
| | Simpson Mill | Townhomes | 84 | |
| Elkridge | Blue Stream | Townhomes | 102 | 244 |
| | Howard Square | Townhomes | 66 | |
| | Shipley's Grant | Townhomes | 48 | |
| | Locust Chapel | Single-Family Detached | 28 | |
| Ellicott City | Oakmont at Turf Valley | Apartments | 192 | 474 |
| | The Gatherings At Ellicott Mills | Townhomes-/Apartments-Age Restricted | 90 | |
| | GTW's Waverly Woods | Single-Family Detached/Townhomes-Age Restricted | 66 | |
| | Autumn River | Single-Family Detached/Townhomes | 43 | |
| | Rockland At Rogers | Single-Family Detached/Townhomes | 42 | |
| | Ellicott Crossing, Part 1 | Townhomes | 41 | |
| Southeast | Maple Lawn Farms | Single-Family Detached/Townhomes | 214 | 274 |
| | Cherrytree Park | Apartments-Age Restricted | 32 | |
| | Riverwalk | Townhomes | 28 | |
| TOTAL | | | | 1,776 |

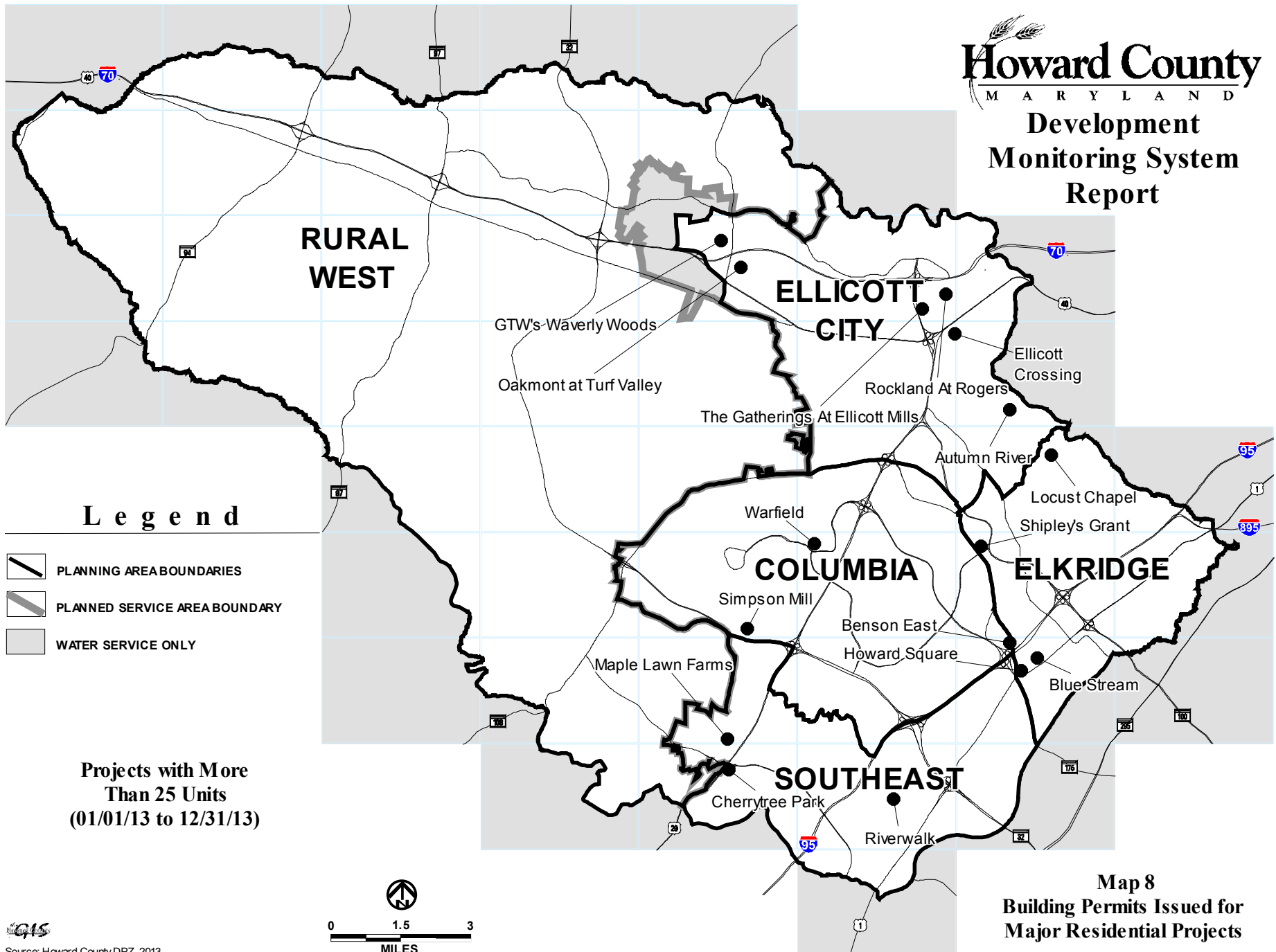
Table 28
Issued Residential Building Permits by Unit Type, 10/01/08 to 12/31/13

| Year | SFD | SFA | APT | MH | Total |
|--------------------|--------------|--------------|--------------|-------------|--------------|
| 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 |
| 01/13 to 12/13 | 671 | 614 | 1,024 | 8 | 2,317 |
| TOTAL | 2,644 | 2,509 | 3,049 | 19 | 8,221 |
| PERCENT | 32% | 31% | 37% | 0.2% | 100% |
| ANNUAL AVG. | 504 | 478 | 581 | 4 | 1,644 |

* Extra quarter included due to change in analysis timeframe



Howard County
 MARYLAND
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GIS
 Source: Howard County DPZ, 2013.

Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2013 to December 31, 2013, the County issued 1,545 use and occupancy permits (Table 29). Of all planning areas, Elkridge had the most with 544. This is followed by the Southeast with 390, Ellicott City with 389, the Rural West with 160 and Columbia with 62. Countywide, 40% of the permits were for single family detached units, 38% were for single family attached units and 22% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type, 1/01/2013 to 12/31/2013

| Planning Area | SFD | SFA | APT | MH | TOTAL | PERCENT |
|--------------------|------------|------------|------------|-----------|--------------|-------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 | 0% |
| All Other Columbia | 13 | 49 | 0 | 0 | 62 | 4% |
| Elkridge | 155 | 224 | 165 | 0 | 544 | 35% |
| Ellicott City | 126 | 141 | 122 | 0 | 389 | 25% |
| Rural West | 160 | 0 | 0 | 0 | 160 | 10% |
| Southeast | 164 | 177 | 49 | 0 | 390 | 25% |
| TOTAL | 618 | 591 | 336 | 0 | 1,545 | 100% |
| PERCENT | 40% | 38% | 22% | 0% | 100% | |

Five Year Results

From October 1, 2008 to December 31, 2013, a total of 6,971 use and occupancy permits have been issued in Howard County (Table 30). This is an annual average of 1,328 permits per year.

Of the 6,971 total use and occupancy permits issued over the five and a quarter year timeframe, 36% were for single family detached units, 36% for single family attached units, and 28% for apartment units. There were 27% more units built last year compared to the year before, 1,545 completions in 2013 compared to 1,220 in 2012. Chart 12 shows the results by unit type graphically over time.

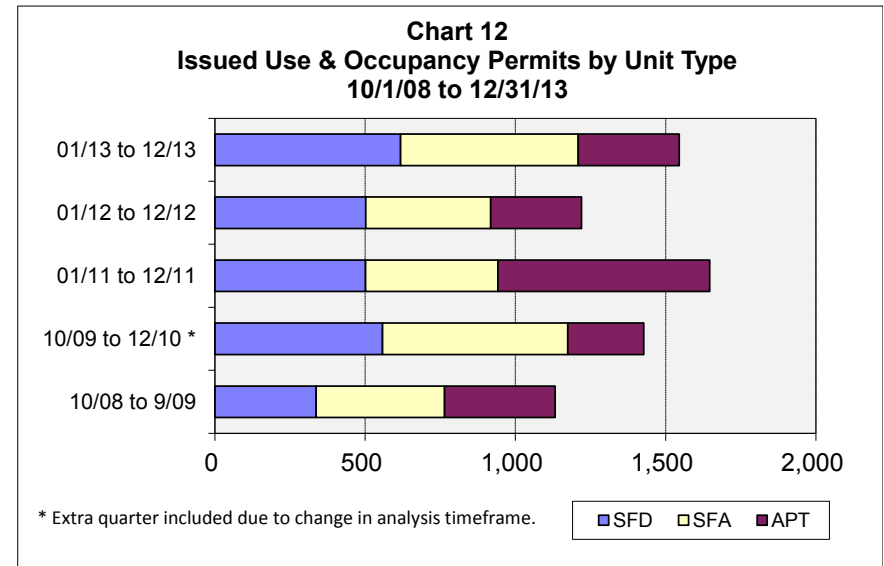


Table 30
Issued Use and Occupancy Permits by Unit Type, 10/08 to 12/13

| Year | SFD | SFA | APT | MH | Total |
|--------------------|--------------|--------------|--------------|-----------|--------------|
| 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 |
| 01/13 to 12/13 | 618 | 591 | 336 | 0 | 1,545 |
| TOTAL | 2,516 | 2,491 | 1,964 | 0 | 6,971 |
| PERCENT | 36% | 36% | 28% | 0% | 100% |
| ANNUAL AVG. | 479 | 474 | 374 | 0 | 1,328 |

* 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 2013 comprehensive zoning further expanded the MIHU regulations requiring a 10% moderate income unit total in the lower density zones including R-20, R-ED, R-12, R-SC, R-SA-8, RR-DEO, RC-DEO, and R-H-ED. A fee in lieu option applies.

The following summarizes recent development activity of age-restricted and MIHU units from January 1, 2013 to December 31, 2013, 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, 2013. This includes both subdivision and site development plans. There were 360 units in process, most of which are in Ellicott City and smaller numbers in the Southeast and Elkridge. The timing of actual development will be paced by APFO.

Countywide there were 128 apartments (including rental and condo), 138 SFA units and 94 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, 12/31/2013
(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 | 45 | 0 | 45 | 13% |
| Ellicott City | 84 | 6 | 112 | 202 | 56% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 10 | 87 | 16 | 113 | 31% |
| TOTAL | 94 | 138 | 128 | 360 | 100% |
| PERCENT | 26% | 38% | 36% | 100% | |

| | | | | | |
|-----------------------|------------|------------|------------|------------|--|
| As of 12/31/12 | 130 | 190 | 349 | 669 | |
|-----------------------|------------|------------|------------|------------|--|

Table 32 shows the total MIHU units in process. These total 779, the majority of which are in Elkridge. This is less than the number in process the previous year which had 784.

Table 32
MIHU Units from Plans in Process, 12/31/2013
(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 | 110 | 449 | 559 | 72% |
| Ellicott City | 0 | 12 | 16 | 28 | 4% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 0 | 10 | 182 | 192 | 25% |
| TOTAL | 0 | 132 | 647 | 779 | 100% |
| PERCENT | 0% | 17% | 83% | 100% | |

| | | | | | |
|-----------------------|----------|-----------|------------|------------|--|
| As of 12/31/12 | 0 | 81 | 703 | 784 | |
|-----------------------|----------|-----------|------------|------------|--|

Table 33 shows just the age-restricted MIHU units in process, 27 of the 779 MIHU unit total. The remaining 752 units are MIHU units that are not age-restricted. There were 58 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, 12/31/2013
(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 | 5 | 0 | 5 | 19% |
| Ellicott City | 0 | 0 | 12 | 12 | 44% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 0 | 10 | 0 | 10 | 37% |
| TOTAL | 0 | 15 | 12 | 27 | 100% |
| PERCENT | 0% | 56% | 44% | 100% | |
| As of 12/31/12 | 0 | 16 | 42 | 58 | |

Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2013 and December 31, 2013. There were a total of 431 units approved. This is substantially more than the 132 units approved during the previous reporting period. The 431 units include 349 apartment units (81%), 46 single family attached units (11%) and 36 single family detached units (8%). 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 62 units were approved – 54 in Ellicott City and 8 in Elkridge. Forty-two 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, 1/01/2013 to 12/31/2013
(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 | 20 | 20 | 5% |
| Elkridge | 0 | 0 | 0 | 0 | 0% |
| Ellicott City | 36 | 46 | 329 | 411 | 95% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 0 | 0 | 0 | 0 | 0% |
| TOTAL | 36 | 46 | 349 | 431 | 100% |
| PERCENT | 8% | 11% | 81% | 100% | |

| | | | | |
|--------------------------------|-----------|-----------|-----------|------------|
| 1/01/2012 to 12/31/2012 | 51 | 49 | 32 | 132 |
|--------------------------------|-----------|-----------|-----------|------------|

Table 35
MIHU Units from Approved Plans, 1/01/13 to 12/31/13
(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 | 8 | 0 | 8 | 13% |
| Ellicott City | 0 | 12 | 42 | 54 | 87% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 0 | 0 | 0 | 0 | 0% |
| TOTAL | 0 | 20 | 42 | 62 | 100% |
| PERCENT | 0% | 32% | 68% | 100% | |

| | | | | |
|--------------------------------|----------|-----------|-----------|-----------|
| 1/01/2012 to 12/31/2012 | 0 | 64 | 15 | 79 |
|--------------------------------|----------|-----------|-----------|-----------|

Table 36
Age-Res. MIHU Units from Approved Plans, 1/01/13 to 12/31/13
(with comparisons to the previous reporting period)

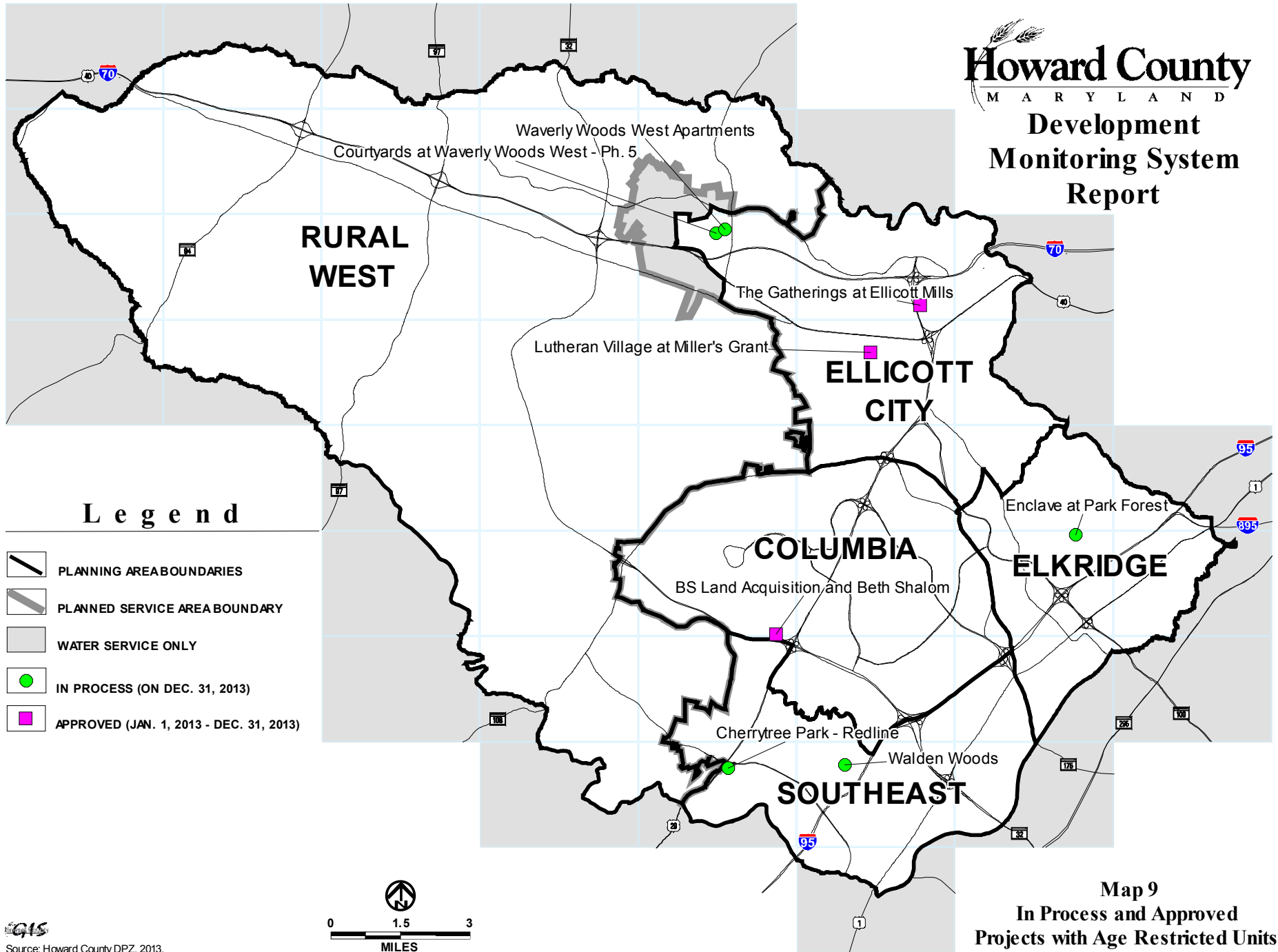
| Planning Area | SFD | SFA | APT | TOTAL | PERCENT |
|--------------------|-----------|-----------|-----------|-----------|-----------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0% |
| All Other Columbia | 0 | 0 | 0 | 0 | 0% |
| Elkridge | 0 | 0 | 0 | 0 | 0% |
| Ellicott City | 0 | 0 | 42 | 42 | 0% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 0 | 0 | 0 | 0 | 0% |
| TOTAL | 0 | 0 | 42 | 42 | 0% |
| PERCENT | 0% | 0% | 0% | 0% | |

| | | | | |
|--------------------------------|----------|----------|----------|----------|
| 1/01/2012 to 12/31/2012 | 0 | 0 | 0 | 0 |
|--------------------------------|----------|----------|----------|----------|






**Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2013**

| 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 |
| The Overlook at Bluestream - Remaining Phs. | S-06-018 | CAC | 0 | 0 | 159 | 159 | 0 | 0 | 0 | 0 | 0 | 0 | 159 | 159 | 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 - Remaining Phases | S-11-001 | TOD | 0 | 0 | 117 | 117 | 0 | 0 | 0 | 0 | 0 | 0 | 117 | 117 | 0 | 0 | 0 | 0 |
| Howard Square - Remaining Phases | S-06-010 | CAC | 0 | 0 | 105 | 105 | 0 | 0 | 0 | 0 | 0 | 0 | 105 | 105 | 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 |
| Annapolis Junction Town Center | SDP-13-048 | TOD | 0 | 0 | 32 | 32 | 0 | 0 | 0 | 0 | 0 | 0 | 32 | 32 | 0 | 0 | 0 | 0 |
| Howard Square | SDP-14-043 | CAC | 0 | 24 | 0 | 24 | 0 | 0 | 0 | 0 | 0 | 24 | 0 | 24 | 0 | 0 | 0 | 0 |
| Morris Place - Remaining Phases | S-10-002 | CAC | 0 | 20 | 0 | 20 | 0 | 0 | 0 | 0 | 0 | 20 | 0 | 20 | 0 | 0 | 0 | 0 |
| The Overlook at Bluestream - Section 2 | SDP-14-029 | CAC | 0 | 19 | 0 | 19 | 0 | 0 | 0 | 0 | 0 | 19 | 0 | 19 | 0 | 0 | 0 | 0 |
| Oxford Square | SDP-14-019 | TOD | 0 | 13 | 0 | 13 | 0 | 0 | 0 | 0 | 0 | 13 | 0 | 13 | 0 | 0 | 0 | 0 |
| Oxford Square | SDP-13-068 | TOD | 0 | 13 | 0 | 13 | 0 | 0 | 0 | 0 | 0 | 13 | 0 | 13 | 0 | 0 | 0 | 0 |
| Waverly Woods West Apartments | SDP-13-031 | PSC | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 12 | 0 | 12 | 0 | 12 | 0 | 0 | 100 | 100 |
| Riverwatch | SDP-08-109 | CAC | 0 | 0 | 12 | 12 | 0 | 0 | 0 | 0 | 0 | 0 | 12 | 12 | 0 | 0 | 0 | 0 |
| Walden Woods | SDP-13-023 | PSC | 0 | 0 | 0 | 0 | 0 | 10 | 0 | 10 | 0 | 10 | 0 | 10 | 10 | 77 | 0 | 87 |
| Morris Place | F-14-028 | CAC | 0 | 8 | 0 | 8 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 8 | 0 | 0 | 0 | 0 |
| Towns at Patuxent Orchard | SDP-13-054 | R-A-15 | 0 | 7 | 0 | 7 | 0 | 0 | 0 | 0 | 0 | 7 | 0 | 7 | 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 |
| Enclave at Park Forest | SDP-13-085 | R-20 | 0 | 0 | 0 | 0 | 0 | 5 | 0 | 5 | 0 | 5 | 0 | 5 | 0 | 40 | 0 | 40 |
| 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 |
| Orchard Park - Section 3 | SDP-13-055 | R-A-15 | 0 | 0 | 4 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 4 | 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 |
| Cherrytree Park - Redline | SDP-08-057 | POR-MXD-6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 16 | 16 |
| 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 |
| TOTAL | | | 0 | 117 | 635 | 752 | 0 | 27 | 0 | 27 | 0 | 144 | 635 | 779 | 94 | 123 | 116 | 333 |

Howard County M A R Y L A N D Development Monitoring System Report



Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON DEC. 31, 2013)
-  APPROVED (JAN. 1, 2013 - DEC. 31, 2013)



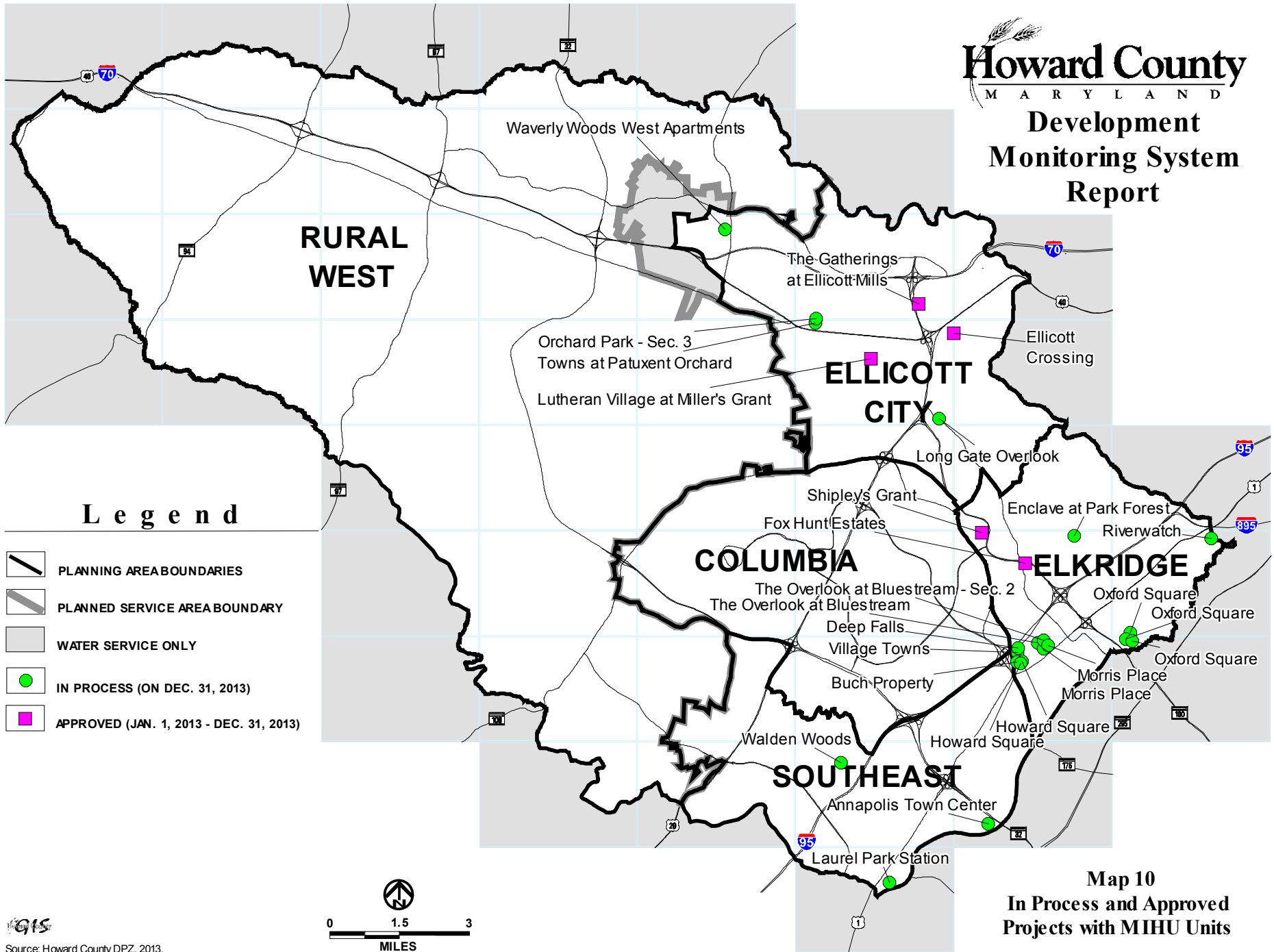
GIS
Source: Howard County DPZ, 2013.

Map 9
In Process and Approved
Projects with Age Restricted Units






Table 38
Approved SDP's with MIHU and Age Restricted Units - January 1, 2013 to December 31, 2013

| 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 |
| 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 |
| 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 |
| Ellicott Crossing - Part 2 | SDP-13-004 | POR-MXD-6 | 0 | 12 | 0 | 12 | 0 | 0 | 0 | 0 | 0 | 12 | 0 | 12 | 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 |
| Shipley's 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 |
| BS Land Acquisition and Beth Shalom | SDP-08-083 | R-20 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 20 | 20 | |
| TOTAL | | | 0 | 20 | 0 | 20 | 0 | 0 | 42 | 42 | 0 | 20 | 42 | 62 | 36 | 46 | 307 | 389 |

Howard County
 MARYLAND
**Development
 Monitoring System
 Report**



Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON DEC. 31, 2013)
-  APPROVED (JAN. 1, 2013 - DEC. 31, 2013)



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

GIS
 Source: Howard County DPZ, 2013.

Use & Occupancy Permits

Table 39 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2013 and December 31, 2013 121 age-restricted units were built, 8% of the total 1,545 housing units built in the County over this latest reporting period.

There were 90 less age-restricted units built in the current reporting period compared to the previous period when there were 211 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, 21% of all new homes built in Howard County have been age-restricted. This is summarized in Table 40.

Table 39
Age Restricted Units Built, 1/01/13 to 12/31/13
(with comparisons to the previous reporting period)

| Planning Area | SFD | SFA | APT | TOTAL | PERCENT |
|----------------------------|------------|------------|------------|-------------|-------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0% |
| All Other Columbia | 2 | 0 | 0 | 2 | 2% |
| Elkridge | 0 | 0 | 0 | 0 | 0% |
| Ellicott City | 35 | 29 | 0 | 64 | 53% |
| Rural West | 0 | 0 | 0 | 0 | 0% |
| Southeast | 0 | 7 | 48 | 55 | 45% |
| TOTAL | 37 | 36 | 48 | 121 | 100% |
| PERCENT | 31% | 30% | 40% | 100% | |
| 1/01/12 to 12/31/12 | 34 | 62 | 115 | 211 | |

Table 40
Age Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/13

| 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% |
| 01/13 to 12/13 | 37 | 36 | 48 | 121 | 1,545 | 8% |
| TOTAL | 151 | 1,028 | 1,620 | 2,799 | 13,302 | 21% |
| PERCENT | 5% | 37% | 58% | 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, 2013 to December 31, 2013, have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 41). The data is graphically represented in Charts 13, 14, and 15.

Home sales prices in Howard County increased last year by 5.3%, from a median sales price of \$380,000 in 2012 for all housing types combined to \$400,000 in 2013. This is the first increase in two years, as prices had remained about the same from 2011 to 2012. Prices had steadily declined from their peak \$400,000 median sales price in 2005/2006 for to a median

of \$350,000 in 2008/2009 and again in 2009/2010. In 2011, however, the median sales price for all housing types combined increased by 8.6% to \$380,000 and then remained at this level in 2012. The mean sales price also increased last year to \$434,306 from \$411,911, a 5.4% increase. Single family detached, attached and condo mean home prices all increased last year at rates of 4.0%, 5.3%, and 6.6%, respectively.

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 9.6%. The median for SFA or townhouse units are down by 5.9% and condos are down by a much larger 25%.

Table 41
Housing Sales by Type, 10/01/08 to 12/31/13

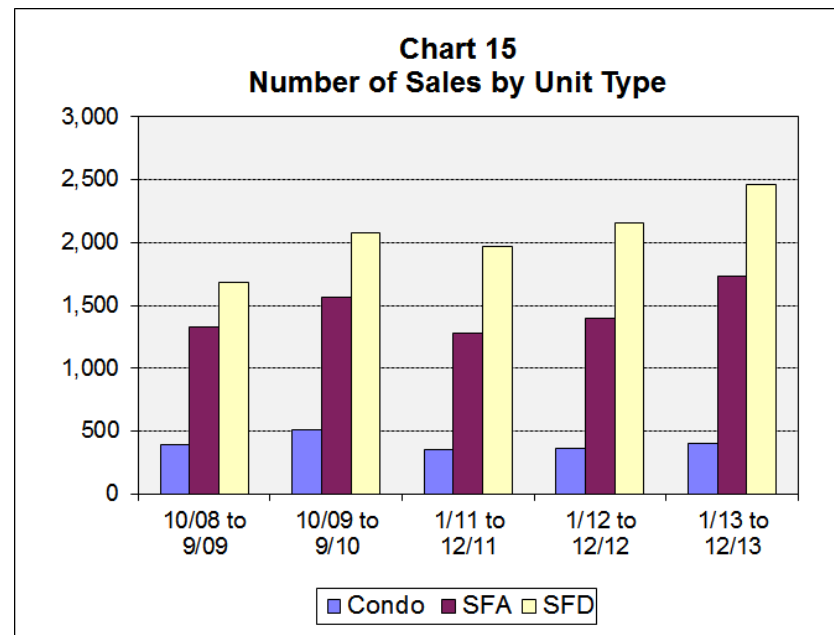
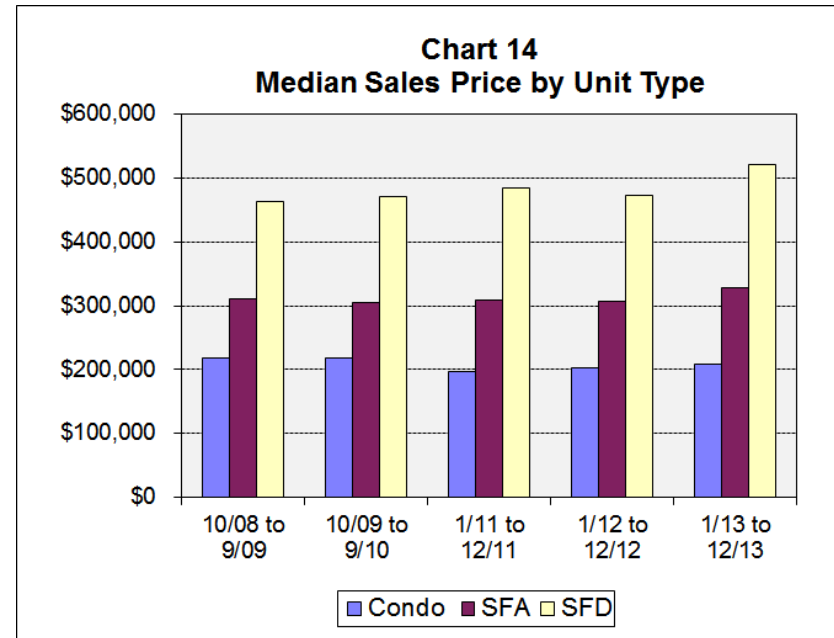
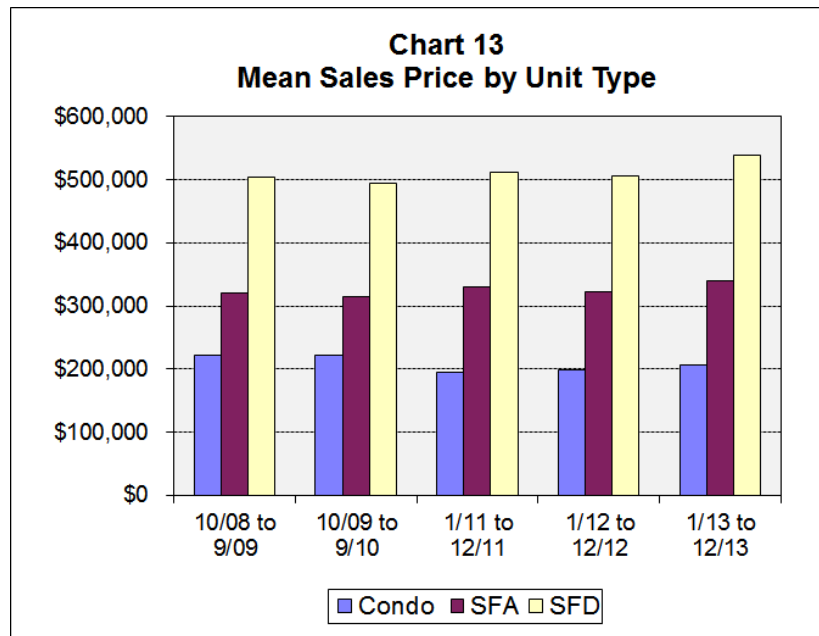
| 10/08 to 9/09 | | | | 10/09 to 9/10 | | | |
|---------------|--------------|------------------|------------------|---------------|--------------|------------------|------------------|
| Unit Type | # of Sales | Mean | Median | Unit Type | # of Sales | Mean | Median |
| Condo | 391 | \$222,730 | \$218,000 | Condo | 512 | \$222,211 | \$217,500 |
| MH | 3 | \$115,000 | \$114,500 | MH | 1 | \$90,000 | \$90,000 |
| SFA | 1,324 | \$321,505 | \$310,000 | SFA | 1,565 | \$313,832 | \$305,000 |
| SFD | 1,685 | \$504,788 | \$463,250 | SFD | 2,072 | \$494,261 | \$470,000 |
| TOTAL | 3,403 | \$400,726 | \$350,000 | TOTAL | 4,150 | \$392,558 | \$350,000 |

| 1/11 to 12/11 | | | | 1/12 to 12/12 | | | |
|---------------|--------------|------------------|------------------|---------------|--------------|------------------|------------------|
| Unit Type | # of Sales | Mean | Median | Unit Type | # of Sales | Mean | Median |
| Condo | 355 | \$194,247 | \$196,365 | Condo | 358 | \$198,496 | \$202,000 |
| MH | 0 | \$0 | \$0 | MH | 3 | \$146,633 | \$175,000 |
| SFA | 1,283 | \$330,800 | \$308,000 | SFA | 1,396 | \$322,141 | \$307,565 |
| SFD | 1,972 | \$511,613 | \$485,000 | SFD | 2,154 | \$506,075 | \$472,500 |
| TOTAL | 3,610 | \$416,143 | \$380,000 | TOTAL | 3,911 | \$411,991 | \$380,000 |

| 1/13 to 12/13 | | | |
|---------------|--------------|------------------|------------------|
| Unit Type | # of Sales | Mean | Median |
| Condo | 405 | \$206,440 | \$208,000 |
| MH | 4 | \$111,025 | \$112,550 |
| SFA | 1,734 | \$339,192 | \$328,823 |
| SFD | 2,459 | \$539,433 | \$520,000 |
| TOTAL | 4,602 | \$434,306 | \$400,000 |

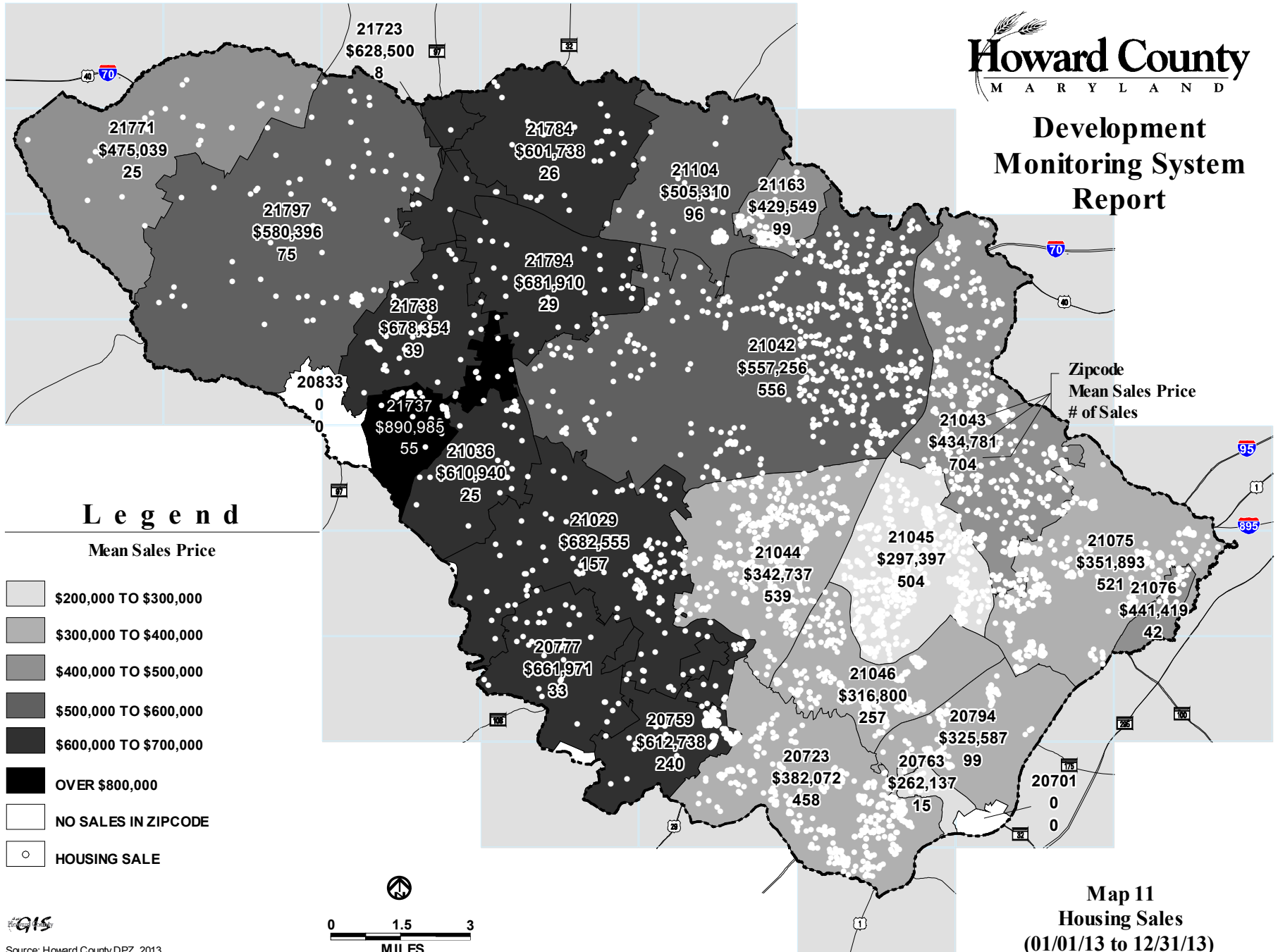
Source: Howard County DPZ analysis of housing sales data from SDAT

The number of home sales increased significantly last year with a total of 4,602 sales. This is 17.7% increase from the 3,911 sales reported in 2012. 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
- OVER \$800,000
- NO SALES IN ZIPCODE
- HOUSING SALE



Source: Howard County DPZ, 2013.



Map 11
Housing Sales
(01/01/13 to 12/31/13)

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 "Batch 14" was initiated, 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. At the conclusion of Batch 14, 14,631 acres had been preserved through the County purchase program.

In March 2013, the law governing the ALPP was amended to eliminate the batching process and applications can now be accepted on a rolling basis. Over the course of 2013, approximately 30 property owners requested scoring for their farms. Of those, eight applied to the ALPP during 2013, with one 50 acre farm going to settlement in August. The other seven were in the various stages of the acquisition process by the end of 2013.

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 2013, no properties were preserved with an agricultural easement through the development process.

As of December 31, 2013, there were 21,651 acres of permanently preserved agricultural land. This includes 14,681 acres of purchased easements through the County's program, 4,041 acres of easements purchased by the State and 2,929 preservation acres dedicated as part of the land development process (Table 42).

Table 42
Agricultural Preservation Easements, December 31, 2013

| Type | Acres | Percent |
|---------------------------------------|---------------|-------------|
| County Purchased Agric. Easements | 14,681 | 68% |
| State Purchased Agric. Easements | 4,041 | 19% |
| Dedicated Agric. Preservation Parcels | 2,929 | 14% |
| TOTAL | 21,651 | 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, 71 acres of land in 21 parcels were dedicated as joint Howard County/Homeowner's Association preservation parcels and another 94 acres in 4 parcels were dedicated as joint Howard County/Howard County Conservancy preservation parcels. Table 43 shows the land preservation totals from dedicated easements through then end of 2013 for all easement types.

Since 1992, preservation easements on 10,978 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 6,095 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 1,065 acres are jointly held by the Howard County Conservancy and Howard County and 366 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 43 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 15,185 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,207 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 10,978 acres, is land in dedicated preservation easements as described earlier. Of the 4,207 acres for residential development, about 581 acres are not yet developed (built on), 3,205 acres are developed (built on) and 421 acres are for roads.

Preservation easements in the Rural West discussed above total 29,700 acres. This includes all 21,651 acres of agricultural preservation easements and 8,049 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 43
Rural Land Preservation Through Dedicated Easements

| Residential Unit Cluster Development | Lots | Acres | |
|---|--------------|--------------|--------------|
| Undeveloped Lots (By Right) | 360 | 398 | |
| Undeveloped Lots (From Density Transfer) | 170 | 183 | |
| Total Undeveloped Lots | 530 | 581 | |
| Developed Lots (By Right) | 1,951 | 2,187 | |
| Developed Lots (From Density Transfer) | 960 | 1,018 | |
| Total Developed Lots | 2,911 | 3,205 | |
| Roadway | | 421 | |
| TOTAL | 3,441 | 4,207 | 27.7% |

| Preservation | Parcels | Acres | |
|---|----------------|---------------|--------------|
| Agricultural Preservation | 85 | 2,929 | |
| Howard County/Homeowner's Association | 575 | 6,095 | |
| Howard County/The Audubon Society | 3 | 69 | |
| Homeowner's Assoc./The Audubon Society | 2 | 61 | |
| Howard County/Howard County Conservancy | 32 | 1,065 | |
| Howard County/Patuxent Conservation Corps. Inc. | 15 | 366 | |
| Other | 88 | 393 | |
| Total Preservation | 800 | 10,978 | 72.3% |

| | | | |
|---|--------------|---------------|---------------|
| GRAND TOTAL (Includes Res. Develop.) | 4,241 | 15,185 | 100.0% |
|---|--------------|---------------|---------------|

Total Preserved Land in the Rural West

Including County and State parks (8,063 acres), WSSC land (2,438 acres), permanent historic easements (101 acres) and other environmental easements (1,118 acres) the total preserved land amounts to 41,420 acres, about 44% of all land in the Rural West.

Map 12 shows the preserved land as of December 31, 2013 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 were no subdivisions utilizing this option. Table 44 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 2013, 192 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 45.

Total Preserved Land in the East

Including County and State parks (10,212 acres), WSSC land (677 acres) and Columbia Association open space (3,628 acres) the total preserved land amounts to 15,148 acres, about 23% of all land in the east. Map 12 shows the locations of the preserved land by the various types.

Table 44
Neighborhood Preservation

| Receiving Parcels | Unit Type | | | | Acres |
|--|------------|-----------|----------|------------|-------------------|
| | SFD | SFA | APT | Total | |
| Undeveloped Lots (By Right) | 17 | 0 | 0 | 17 | 2.7 |
| Undeveloped Lots (From Density Transfer) | 0 | 0 | 0 | 0 | 0.0 |
| Total Undeveloped Lots | 17 | 0 | 0 | 17 | 2.7 |
| Developed Lots (By Right) | 122 | 60 | 0 | 182 | 32.0 |
| Developed Lots (From Density Transfer) | 4 | 6 | 0 | 10 | 1.4 |
| Total Developed Lots | 126 | 66 | 0 | 192 | 33.4 |
| Open Space | | | | | 53.9 |
| Roadway | | | | | 6.1 |
| Other | | | | | 0.9 |
| Total | 143 | 66 | 0 | 209 | 96.9 91.7% |

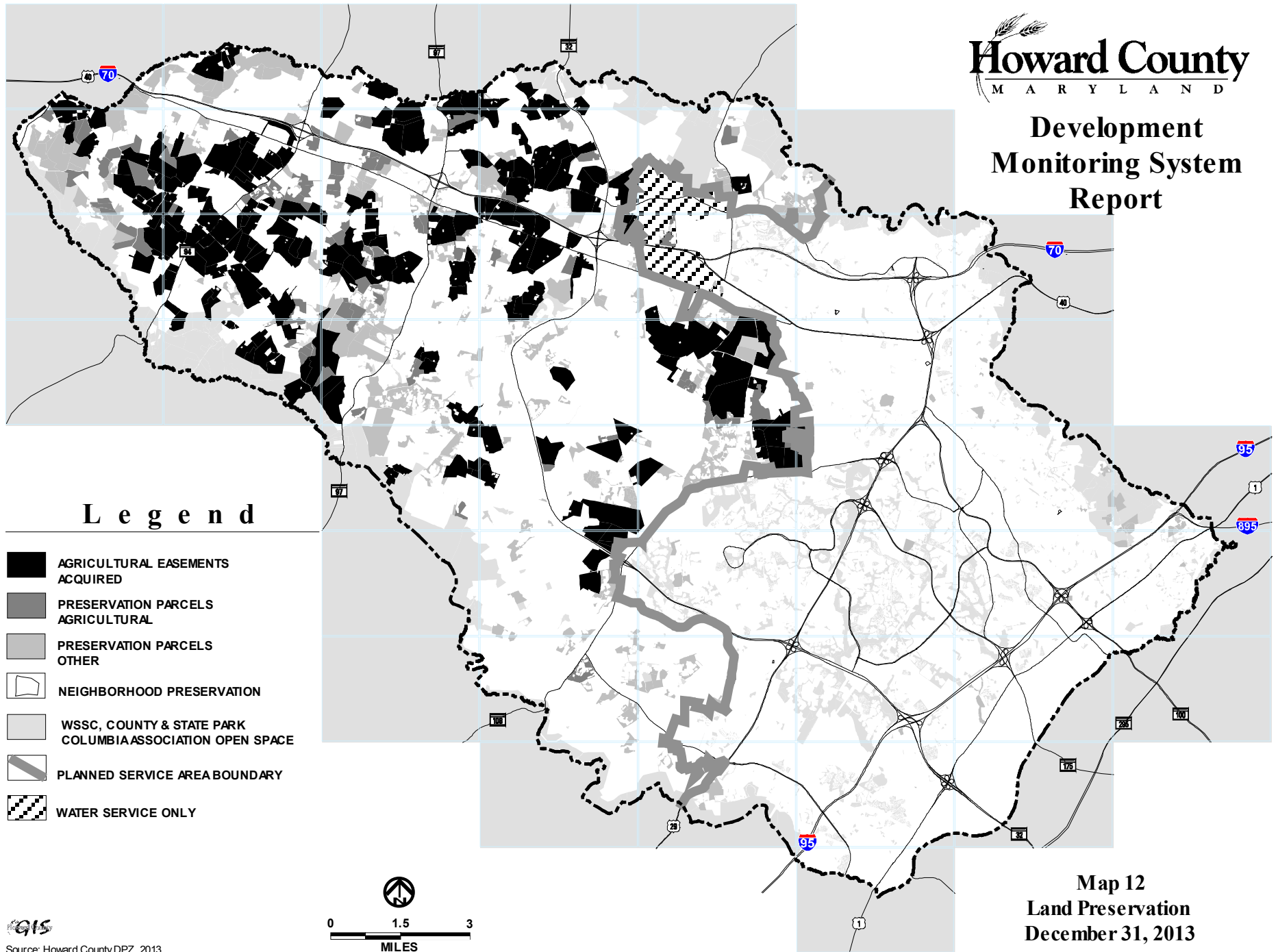
| East Preserved Land - Sending Parcels | Preservation | |
|---------------------------------------|--------------|---------------------|
| Easement Holder | Parcels | Acres |
| Howard County Government | 5 | 8.8 |
| Maryland Environmental Trust | 0 | 0.0 |
| Maryland Historical Trust | 0 | 0.0 |
| Total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

Table 45
East Preservation Easements, December 31, 2013








| 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 | |

Howard County M A R Y L A N D

Development Monitoring System Report

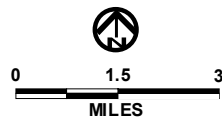


Legend

-  AGRICULTURAL EASEMENTS ACQUIRED
-  PRESERVATION PARCELS AGRICULTURAL
-  PRESERVATION PARCELS OTHER
-  NEIGHBORHOOD PRESERVATION
-  WSSC, COUNTY & STATE PARK COLUMBIA ASSOCIATION OPEN SPACE
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY



Source: Howard County DPZ, 2013.



Map 12
Land Preservation
December 31, 2013

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 24 subdivision plans totaling 293 acres (Table 46). 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 46
Recorded Non-Residential Subdivisions, 01/01/2013 to 12/31/2013

| Region | Lots | | Subdivision Plans | | Acreage | |
|--------------------|----------|-------------|-------------------|-------------|------------|-------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Downtown Columbia | 6 | 150% | 1 | 4% | 10 | 3% |
| All Other Columbia | (5) | -125% | 6 | 25% | 59 | 20% |
| Elkridge | (1) | -25% | 7 | 29% | 124 | 42% |
| Ellicott City | 3 | 75% | 4 | 17% | 46 | 16% |
| Rural West | 0 | 0% | 0 | 0% | 0 | 0% |
| Southeast | 1 | 25% | 6 | 25% | 53 | 18% |
| TOTAL | 4 | 100% | 24 | 100% | 293 | 100% |

Table 49 shows the recorded non-residential subdivisions from October 1, 2008 to December 31, 2013. Over this five year period there were 22 non-residential lots recorded countywide in 102 subdivision plans totaling 1,953 acres. This amounts to an annual average over the analysis time period of 4 lots in 19 plans encompassing 372 acres.

Table 47
Recorded Non-Residential Subdivisions, 10/01/08 to 12/31/13

| Countywide | Lots | Plans | Acreage |
|--------------------|-----------|------------|--------------|
| 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 |
| 01/13 to 12/13 | 4 | 24 | 293 |
| TOTAL | 22 | 102 | 1,953 |
| ANNUAL AVG. | 4 | 19 | 372 |

* Extra quarter included due to change in analysis timeframe

In-Process Plans

Countywide, there were 23 non-residential subdivision plans in process as of December 31, 2013. This compares to 26 plans in process for the previous reporting period (Table 48). Eight plans were in Columbia, six plans in Ellicott City, five plans in Elkrige, four plans in the Southeast, and one plan was in the Rural West. Most of the plans were in the final plan or environmental concept plan stage.

Table 49 shows the number of potential non-residential lots in process. As of December 31, 2013, there were 14 lots in process, compared to 10 in process on December 31, 2012. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 366 non-residential acres in the subdivision process as of December 31, 2013 (Table 50). This compares to 240 acres in process one year earlier. For the current year the greatest acreage amount is in Elkrige (226 acres). This is followed by Ellicott City with 59 acres, Columbia with 47 acres, and 34 acres in the Southeast.

Table 48
Number of Non-Residential Plans in Process, 12/31/2013
with Comparisons to 12/31/2012 Countywide Totals

| Region | Environmental Concept | Sketch | Preliminary Equivalent Sketch | Preliminary | Final | TOTAL PLANS |
|-----------------------|-----------------------|----------|-------------------------------|-------------|-----------|-------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 6 | 0 | 0 | 0 | 2 | 8 |
| Elkrige | 0 | 1 | 0 | 1 | 3 | 5 |
| Ellicott City | 4 | 0 | 0 | 0 | 2 | 6 |
| Rural West | 1 | 0 | 0 | 0 | 0 | 1 |
| Southeast | 1 | 0 | 0 | 1 | 1 | 3 |
| TOTAL | 12 | 1 | 0 | 2 | 8 | 23 |
| 12/31/12 Total | 11 | 1 | 1 | 1 | 12 | 26 |

Table 49
Non-Residential Lots from Subdivision Plans in Process, 12/31/2013
with Comparisons to 12/31/2012 Countywide Totals

| Region | Sketch | Preliminary Equivalent Sketch | Preliminary | Final | TOTAL LOTS |
|-----------------------|----------|-------------------------------|-------------|----------|------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 0 | 0 | 0 | 0 | 0 |
| Elkrige | 5 | 0 | 1 | (1) | 5 |
| Ellicott City | 0 | 0 | 0 | 0 | 0 |
| Rural West | 0 | 0 | 0 | 0 | 0 |
| Southeast | 0 | 0 | 2 | 7 | 9 |
| TOTAL | 5 | 0 | 3 | 6 | 14 |
| 12/31/12 Total | 1 | 3 | 2 | 4 | 10 |

Table 50
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2013
with Comparisons to 12/31/2012 Countywide Totals

| Region | Sketch | Preliminary Equivalent Sketch | Preliminary | Final | TOTAL ACRES |
|-----------------------|------------|-------------------------------|-------------|------------|-------------|
| Downtown Columbia | 0 | 0 | 0 | 0 | 0 |
| All Other Columbia | 0 | 0 | 0 | 47 | 47 |
| Elkrige | 122 | 0 | 17 | 87 | 226 |
| Ellicott City | 0 | 0 | 0 | 59 | 59 |
| Rural West | 0 | 0 | 0 | 0 | 0 |
| Southeast | 0 | 0 | 15 | 19 | 34 |
| TOTAL | 122 | 0 | 32 | 212 | 366 |
| 12/31/12 Total | 17 | 10 | 15 | 198 | 240 |

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 almost 1.1 million square feet were approved in 31 site development plans on 424 acres (Table 51). The greatest amount of square footage approved was in the Southeast, followed by Columbia (excluding downtown), Elkridge and then Downtown Columbia. Ellicott City had the smallest amount approved.

Table 52 shows the approved square footage by building type. About 380,000 square feet, 35% of the total, are for office/service uses, most of which is in the Southeast and Elkridge. About 356,000 square feet, 33% of the total, are for manufacturing/extensive industrial uses. Retail uses account for about 176,000 square feet, and government and institutional uses account for 165,000 square feet. Chart 16 shows this breakdown graphically.

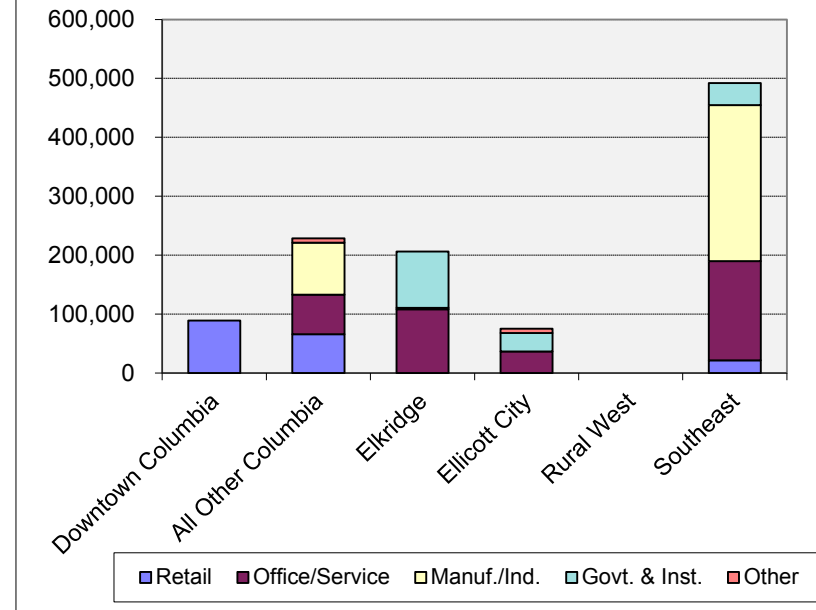
Table 51
Approved Non-Residential Site Development Plans, 1/1/13 to 12/31/13

| Region | Square Feet | | Site Dev. Plans | | Acreage | |
|--------------------|------------------|------------|-----------------|-------------|------------|------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Downtown Columbia | 89,000 | 8% | 4 | 13% | 33 | 8% |
| All Other Columbia | 228,564 | 21% | 6 | 19% | 87 | 21% |
| Elkridge | 206,122 | 19% | 6 | 19% | 120 | 28% |
| Ellicott City | 75,132 | 7% | 7 | 23% | 142 | 34% |
| Rural West | 0 | 0% | 1 | 3% | 3 | 1% |
| Southeast | 492,203 | 45% | 7 | 23% | 40 | 9% |
| TOTAL | 1,091,021 | 92% | 31 | 100% | 424 | 92% |

Table 52
Building Square Feet in Approved Non-Residential Site Development Plans
1/1/13 to 12/31/13

| Region | Retail | Office/Service | Manuf./Ext. Ind. | Govt. & Inst. | Other | TOTAL |
|--------------------|----------------|----------------|------------------|----------------|---------------|------------------|
| Downtown Columbia | 89,000 | 0 | 0 | 0 | 0 | 89,000 |
| All Other Columbia | 65,525 | 67,133 | 88,525 | 0 | 7,381 | 228,564 |
| Elkridge | 0 | 108,000 | 2,375 | 95,747 | 0 | 206,122 |
| Ellicott City | 0 | 36,402 | 0 | 31,486 | 7,244 | 75,132 |
| Rural West | 0 | 0 | 0 | 0 | 0 | 0 |
| Southeast | 21,404 | 168,353 | 265,002 | 37,444 | 0 | 492,203 |
| TOTAL | 175,929 | 379,888 | 355,902 | 164,677 | 14,625 | 1,091,021 |
| PERCENT | 16.1% | 34.8% | 32.6% | 15.1% | 1.3% | 100.0% |

Chart 16
Sq. Ft. in Approved Site Development Plans
1/1/13 to 12/31/13



Last Year's Projects - Greater than 20,000 Square Feet

Of the 1.1 million square feet of non-residential building space approved in site development plans last year, about 950,000 square feet, 87% of the total, were in plans with more than 20,000 square feet. These larger plans are shown in Table 53. The locations of these plans are shown on Map 13.

In Downtown Columbia, one large plans was approved last year - a restaurant and retail space as part of the Columbia Mall redevelopment. In the rest of Columbia, two large plans were approved - a warehouse/office building in the Midway Business Center and additional office, restaurant and retail space in the Village of Wilde Lake. There were also two larger

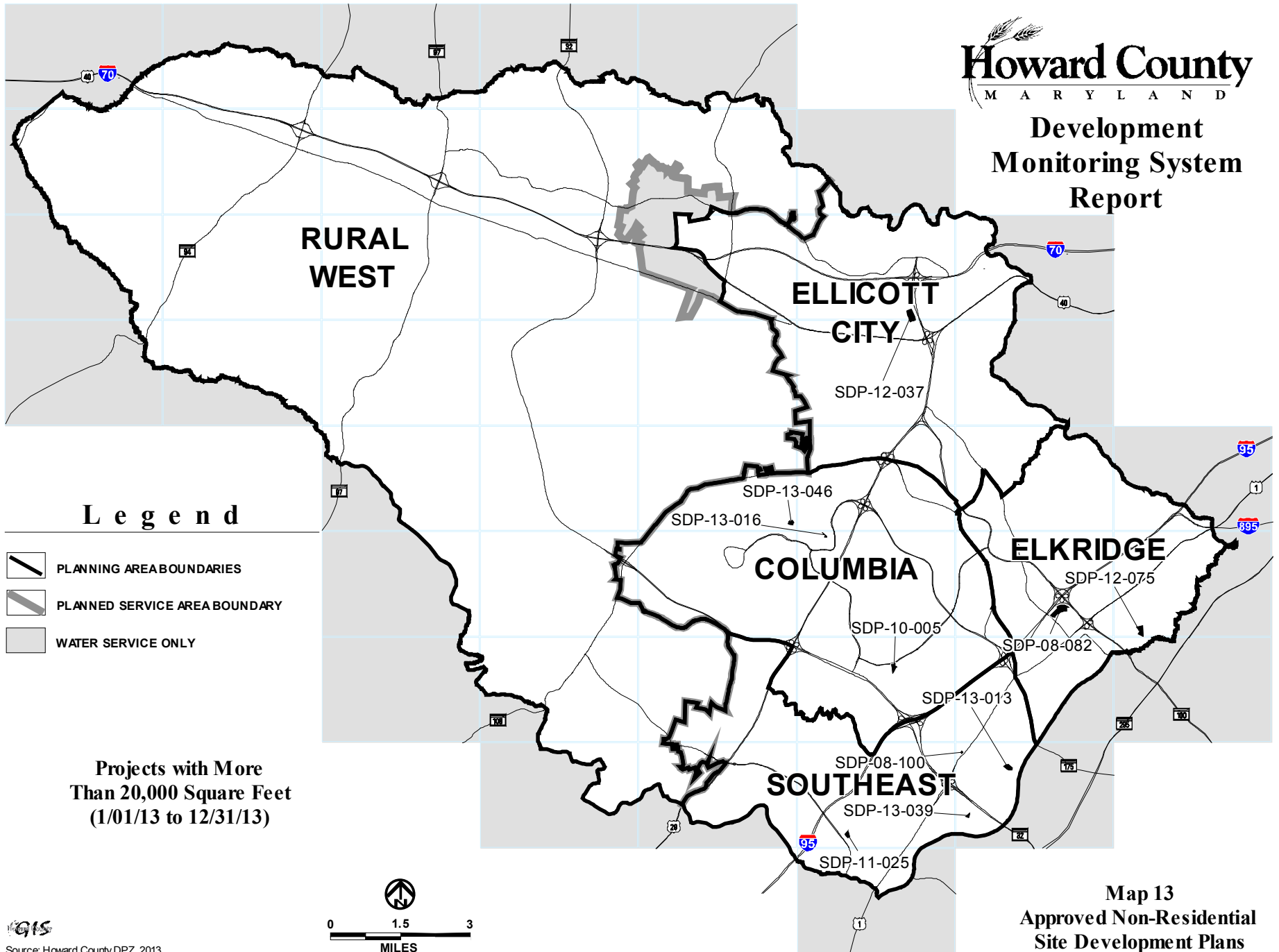
plans approved in Elkridge - an office building in the Corridor 95 Business Park and the new Thomas Viaduct Middle School located near Oxford Square. In Ellicott City, there was an approved plan for the Bethel Korean Presbyterian Church. In the Southeast four larger plans were approved - restaurant and retail space as part of Columbia Junction, a new large office building in Emerson, a large warehouse/office building in the Patuxent Park Industrial Area, and the new Central Maryland Transit Facility.

Table 53
Projects With More Than 20,000 Square Feet in Approved Non-Residential Site Development Plans, 1/1/13 to 12/31/13

| Region | File Number | Plan Name | Use | Building Area | TOTAL |
|--------------------|-------------|-----------------------------------|----------------------------|---------------|----------------|
| Downtown Columbia | SDP-13-016 | The Mall in Columbia | Restaurant, Retail | 75,000 | 75,000 |
| All Other Columbia | SDP-10-005 | Midway Business Center | Warehouse/Office | 88,525 | 179,517 |
| | SDP-13-046 | Village of Wilde Lake | Office, Restaurant, Retail | 90,992 | |
| Elkridge | SDP-08-082 | Corridor 95 Business Park | Office Building | 108,000 | 203,747 |
| | SDP-12-075 | Thomas Viaduct Middle School | Public School | 95,747 | |
| Ellicott City | SDP-12-037 | Bethel Korean Presbyterian Church | Church | 31,486 | 31,486 |
| Southeast | SDP-08-100 | Columbia Junction | Restaurant, Retail | 21,404 | 458,213 |
| | SDP-11-025 | Emerson - Revitz Property | Office Building | 153,454 | |
| | SDP-13-013 | Patuxent Park Industrial Area | Warehouse/Office | 262,155 | |
| | SDP-13-039 | Central MD Transit Facility | Bus Maintenance Facility | 21,200 | |
| TOTAL | | | | | 947,963 |



Development Monitoring System Report



GIS Source: Howard County DPZ, 2013.

Five Year Results

Table 54 shows the Countywide approved non-residential site development plans for the last five reporting periods from October 1, 2008 to December 31, 2013. Over this timeframe there were 135 plans approved on 1,342 acres including 4.3 million square feet of building space. This equates to an annual average of about 820,000 square feet of new building space per year.

Last year, with 1.1 million square feet of approved space, was the most since 2008/09. Chart 17 depicts this annual amounts and clearly shows the increasing approval amounts over the last three years since 2011. This is a good sign indicating that growing strength of the economy.

Table 55 shows the five year history by building type. Over the five years, about 52% of the total 4.3 million square feet was for office/service space. About 21% was for manufacturing/extensive industrial space, 15% for government and institutional uses, 10% for retail uses and less than 1% for other uses.

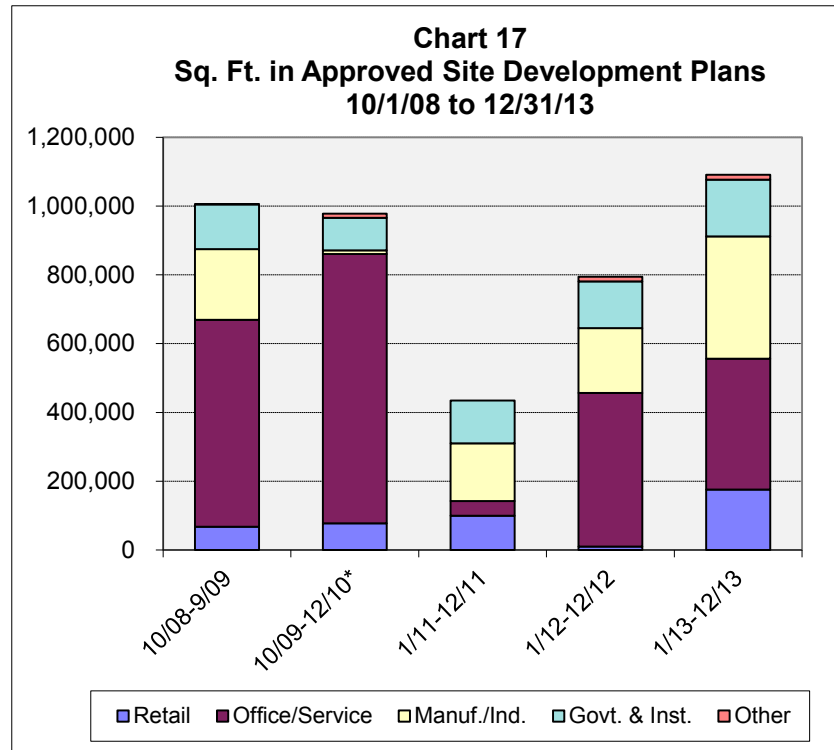


Table 54
Approved Non-Residential Site Development Plans
10/01/08 to 12/31/13

| Year | Square Feet | Number or Plans | Acreage |
|--------------------|------------------|-----------------|--------------|
| 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 |
| 1/13-12/13 | 1,091,021 | 31 | 424 |
| TOTAL | 4,302,623 | 135 | 1,342 |
| ANNUAL AVG. | 819,547 | 26 | 256 |

* Extra quarter included due to change in analysis timeframe

Table 55
Building Square Feet in Approved Non-Residential Site Development Plans
10/01/08 to 12/31/13

| Year | Retail | Office/Service | Manuf./Ext. Ind. | Govt. & Inst. | Other | TOTAL |
|----------------|----------------|------------------|------------------|----------------|---------------|------------------|
| 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 |
| 1/13-12/13 | 175,929 | 379,888 | 355,902 | 164,677 | 14,625 | 1,091,021 |
| TOTAL | 431,141 | 2,253,028 | 927,564 | 650,856 | 40,034 | 4,302,623 |
| PERCENT | 10.0% | 52.4% | 21.6% | 15.1% | 0.9% | 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, 2013 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 32 non-residential site development plans in process as of December 31, 2013. These plans include about 620,000 square feet of building space covering 425 acres. This compares to about 1.1 million square feet in 41 plans on 426 acres that were in process the previous year (on December 31, 2012).

As shown in Table 56, the Southeast had the most square footage in process, followed by Elkridge. Table 57 shows a more detailed breakdown of square footage by building type. About 385,000 square feet are for office/service buildings and 148,000 for retail uses. Manufacturing/extensive industrial space accounts for 29,000 square feet and there was 43,000 square feet of government and institutional space in process.

Major Projects

Table 58 shows site development plans with buildings greater than 20,000 square feet. Map 14 shows the locations of these projects. These projects account for about 77% of the total 620,000 square feet of building space in process.

Table 56
In-Process Non-Residential Site Development Plans, 12/31/13
with Comparisons to Countywide In-Process on 12/31/12

| Region | Square Feet | | Site Dev. Plans | | Acreage | |
|--------------------|------------------|-------------|-----------------|-------------|------------|-------------|
| | Number | Percent | Number | Percent | Number | Percent |
| Downtown Columbia | 24,975 | 4% | 1 | 3% | 5 | 1% |
| All Other Columbia | 77,378 | 12% | 5 | 16% | 31 | 7% |
| Elkridge | 187,040 | 30% | 10 | 31% | 58 | 14% |
| Ellicott City | 46,150 | 7% | 7 | 22% | 20 | 5% |
| Rural West | 34,400 | 6% | 5 | 16% | 262 | 62% |
| Southeast | 249,812 | 40% | 4 | 13% | 49 | 11% |
| TOTAL | 619,755 | 100% | 32 | 100% | 425 | 100% |
| 12/31/2012 | 1,092,575 | | 42 | | 426 | |

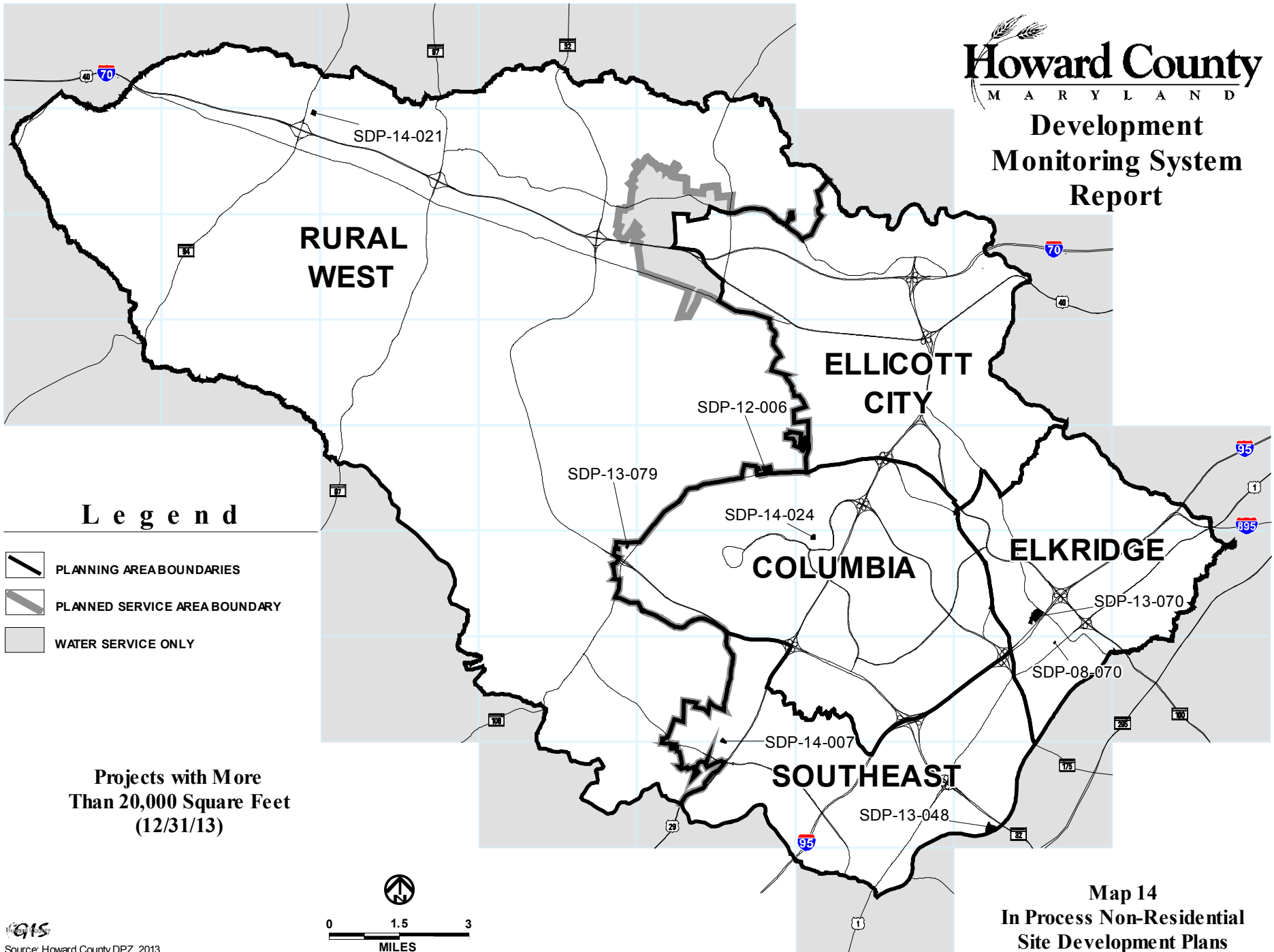
Table 57
Building Square Feet in In-Process Site Development Plans, 12/31/13
with Comparisons to Countywide In-Process on 12/31/12

| Region | Retail | Office/ | | Govt. | | TOTAL |
|--------------------|----------------|----------------|----------------|----------------|---------------|------------------|
| | | Service | Manuf./ | & Inst. | Other | |
| Downtown Columbia | 24,975 | 0 | 0 | 0 | 0 | 24,975 |
| All Other Columbia | 36,158 | 17,220 | 0 | 24,000 | 0 | 77,378 |
| Elkridge | 20,432 | 117,223 | 28,744 | 18,709 | 1,932 | 187,040 |
| Ellicott City | 27,477 | 12,300 | 0 | 0 | 6,373 | 46,150 |
| Rural West | 24,800 | 4,800 | 0 | 0 | 4,800 | 34,400 |
| Southeast | 14,250 | 233,262 | 0 | 0 | 2,300 | 249,812 |
| TOTAL | 148,092 | 384,805 | 28,744 | 42,709 | 15,405 | 619,755 |
| PERCENT | 23.9% | 62.1% | 4.6% | 6.9% | 2.5% | 100.0% |
| 12/31/2012 | 127,232 | 411,684 | 351,646 | 186,185 | 15,825 | 1,092,572 |

Table 58
Projects With More Than 20,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/13

| Region | File Number | Plan Name | Use | Building Area | TOTAL |
|-------------------|-------------|--------------------------------|--------------------------|---------------|----------------|
| Downtown Columbia | SDP-14-024 | Warfield Neighborhood | Retail | 24,975 | 24,975 |
| Columbia | SDP-13-079 | Clarksville Commons | Shopping Center | 36,158 | 60,158 |
| | SDP-12-006 | Dar-Al-Taqwa | Religious Facility | 24,000 | |
| Elkridge | SDP-13-070 | The Meadows Corporate Park | Retail & Office | 88,687 | 117,431 |
| | SDP-08-070 | Washington Manor Park | Manufacturing | 28,744 | |
| Rural West | SDP-14-021 | Wilson Village | Retail & Community Room | 29,600 | 29,600 |
| Southeast | SDP-14-007 | Maple Lawn Farms | Office | 130,062 | 247,512 |
| | SDP-13-048 | Annapolis Junction Town Center | Office, Bank, Restaurant | 117,450 | |
| TOTAL | | | | | 479,676 |

**Development
Monitoring System
Report**



Legend

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

**Projects with More
Than 20,000 Square Feet
(12/31/13)**



**Map 14
In Process Non-Residential
Site Development Plans**

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. This data comes from the Howard County Department of Inspections, Licenses and Permits.

Summary of Last Year

For the latest reporting period, from January 1, 2013 to December 31, 2013, 90 permits were issued for over 1.3 million square feet in non-residential building space (Table 59). The greatest amount of square footage was in the Southeast, followed by Columbia and then Elkridge.

Table 59
Issued Non-Residential Building Permits, 1/01/13 to 12/31/13

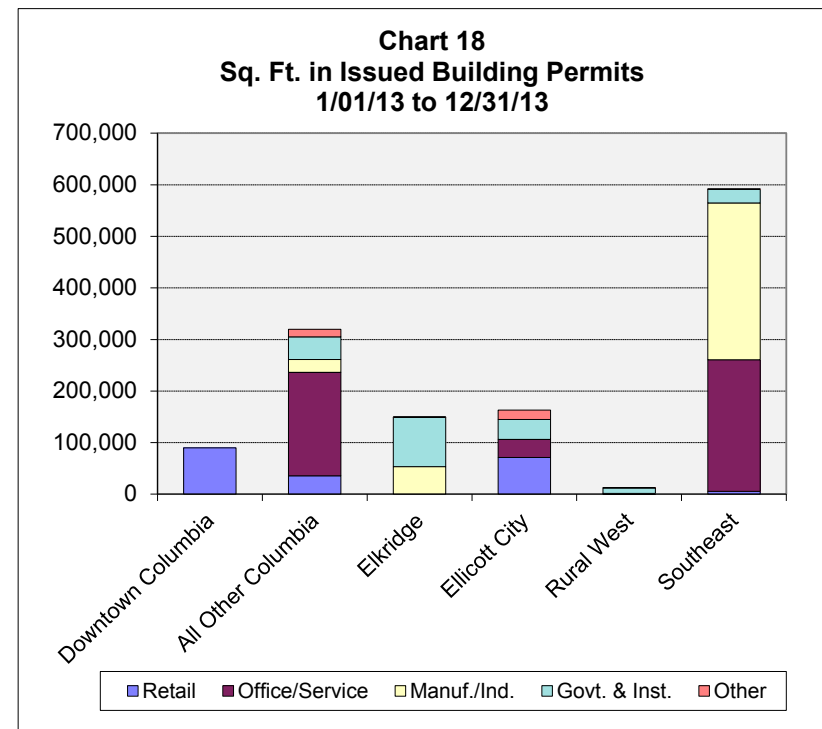
| Region | Square Feet | | Permits Issued | |
|--------------------|------------------|-------------|----------------|-------------|
| | Number | Percent | Number | Percent |
| Downtown Columbia | 89,647 | 7% | 5 | 6% |
| All Other Columbia | 319,940 | 24% | 36 | 40% |
| Elkridge | 149,738 | 11% | 7 | 8% |
| Ellicott City | 163,297 | 12% | 12 | 13% |
| Rural West | 12,433 | 1% | 7 | 8% |
| Southeast | 592,366 | 45% | 23 | 26% |
| TOTAL | 1,327,421 | 100% | 90 | 100% |

Table 60 shows the approved square footage by building type. About 490,000 square feet, 37% of the total, are for office/service uses. Another 29%, about 384,000 square feet, are for manufacturing/Extensive industrial uses. This is followed by government & institutional, retail, and other uses. These last three categories combined make up the remaining 34% of the total square footage issued. Chart 18 shows this breakdown graphically by Planning Area. It is clear that office/service and manufacturing/ extensive industrial space in the Southeast were the majority permitted.

Table 60
Building Square Feet in Issued Non-Residential Building Permits
01/01/13 to 12/31/13

| Region | Office/ | | Manuf./ | Govt. | Other | TOTAL |
|-------------------|----------------|----------------|----------------|----------------|---------------|------------------|
| | Retail | Service | Ext. Ind. | & Inst. | | |
| Downtown Columbia | 89,647 | 0 | 0 | 0 | 0 | 89,647 |
| Columbia | 35,777 | 200,374 | 24,832 | 44,146 | 14,811 | 319,940 |
| Elkridge | 0 | 0 | 53,610 | 95,838 | 290 | 149,738 |
| Ellicott City | 71,417 | 34,808 | 0 | 38,740 | 18,332 | 163,297 |
| Rural West | 126 | 0 | 1,200 | 10,915 | 192 | 12,433 |
| Southeast | 5,490 | 255,255 | 303,973 | 26,385 | 1,263 | 592,366 |
| TOTAL | 202,457 | 490,437 | 383,615 | 216,024 | 34,888 | 1,327,421 |
| PERCENT | 15.3% | 36.9% | 28.9% | 16.3% | 2.6% | 100.0% |

Chart 18
Sq. Ft. in Issued Building Permits
1/01/13 to 12/31/13



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

Of the 1.3 million square feet of non-residential building space in issued permits over the current reporting period, about 1.05 million square feet, 79% of the total, were in plans with more than 30,000 square feet. These larger buildings are shown in Table 61. The location of these buildings are shown on Map 15.

The largest projects were a storage/warehouse building in the Patuxent Park Industrial Area (241,755 square feet) and an office building in Emerson (154,275 square feet), both located in the Southeast.

In Elkridge, building permits for two large projects were issued - a new middle school (95,838 square feet) and an office/warehouse building on Montevideo Road (47,794 square feet).

In Columbia, three new large office buildings was permitted, two in the Midway Business Center and one on the W.R. Grace campus. Building permits for the Columbia Mall expansion were also issued and construction is underway there.

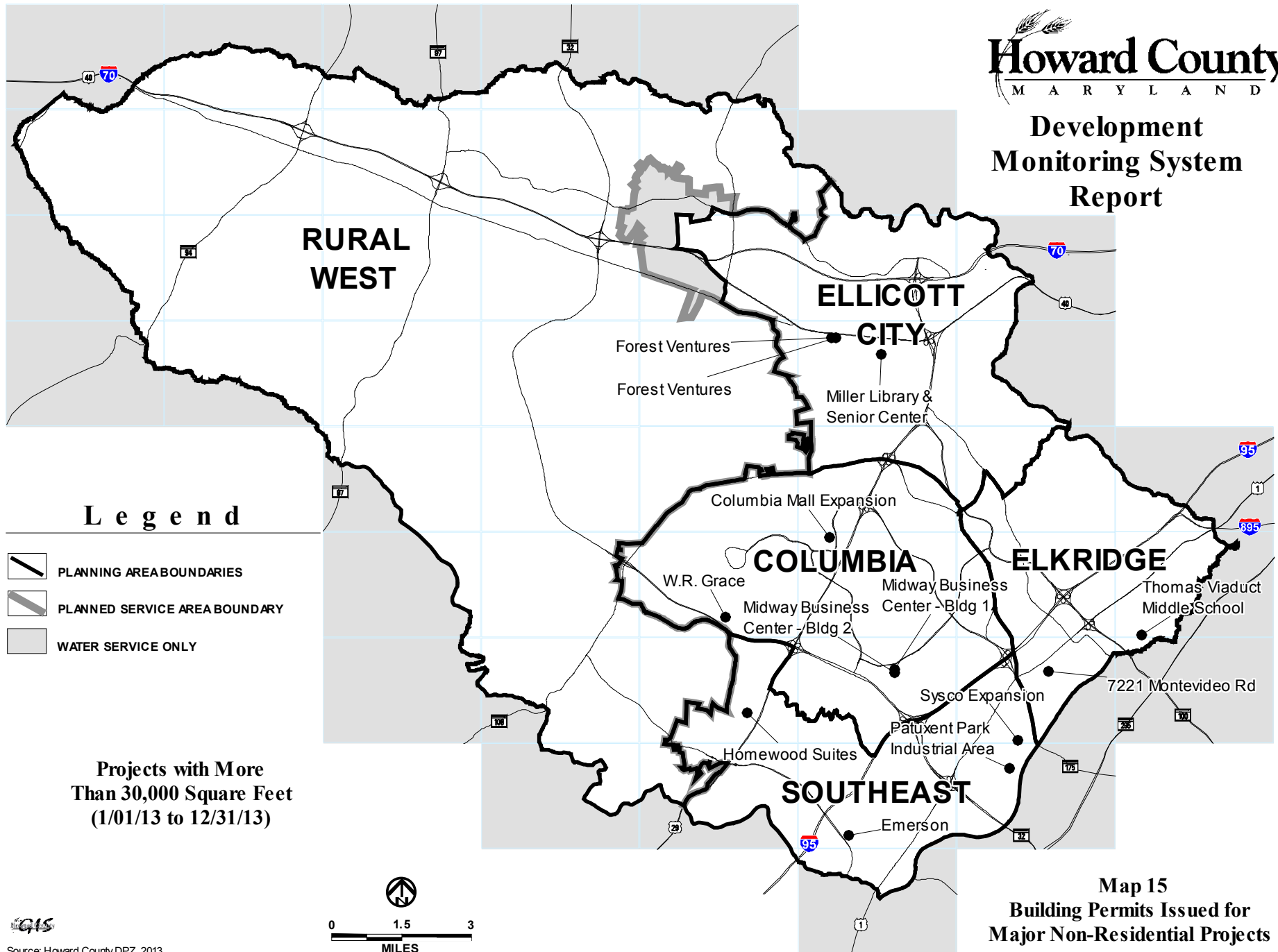
In Ellicott City, a new 43,728 square foot retail building and new 34,648 office building were permitted as part of Forest Ventures. The 32,752 square foot re-development of the old Miller Library is also underway.

Table 61
Building Permits Issued for Major Non-Residential Projects With More Than 30,000 Square Feet, 1/01/13 to 12/31/13




| Region | Name | Proposed Use | Square Feet | TOTAL |
|--------------------|-----------------------------------|----------------------------------|-------------|------------------|
| Downtown Columbia | Columbia Mall Expansion | Retail/Restaurant | 89,647 | 89,647 |
| All Other Columbia | W.R. Grace | Office Building | 87,471 | 177,421 |
| | Midway Businesss Center - Bldg. 1 | Office Building | 58,594 | |
| | Midway Businesss Center - Bldg. 2 | Office Building | 31,356 | |
| Elkridge | Thomas Viaduct Middle School | New Public Middle School | 95,838 | 143,632 |
| | 7221 Montevideo Road | Office/Warehouse | 47,794 | |
| Ellicott City | Forest Ventures | Retail | 43,728 | 111,128 |
| | Forest Ventures | Office Building | 34,648 | |
| | Miller Library & Senior Center | Library Admin. and Senior Center | 32,752 | |
| Southeast | Patuxent Park Industrial Area | Storage/Warehouse | 241,755 | 525,092 |
| | Emerson | Office Building | 154,275 | |
| | Homewood Suites | Hotel | 96,644 | |
| | Sysco Expansion | Industrial | 32,418 | |
| TOTAL | | | | 1,046,920 |



Development Monitoring System Report



Legend

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

Projects with More Than 30,000 Square Feet (1/01/13 to 12/31/13)

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



Source: Howard County DPZ, 2013.



Five Year Results

Table 62 shows issued non-residential building permits countywide for the last five reporting periods from October 1, 2008 to December 31, 2013. Over this timeframe there were 380 permits issued for about 5.4 million square feet of building space. This equates to an annual average of about 1.02 million square feet per year.

The latest reporting period, with 1,327,421 square feet in issued permits is a 24% increase from the 1,071,462 square feet permitted the year before, and the greatest amount permitted over the last five years.

Table 63 shows the five year history by building type. Over the five years, 38% of the total 5.4 million square feet was for office/service space. About 14% was for retail space, 26% for government and institutional uses and 15% for manufacturing/extensive industrial space. Chart 19 shows this graphically.

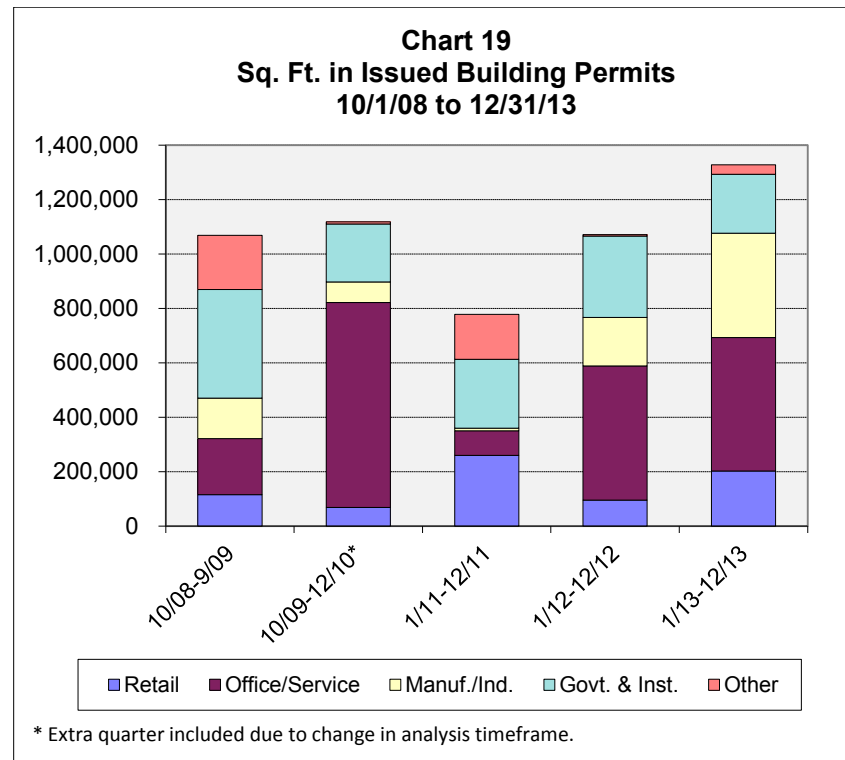


Table 62
Issued Non-Residential Building Permits
10/01/08 to 12/31/13

| Year | Square Feet | Number of Permits |
|--------------------|------------------|-------------------|
| 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 |
| 1/13-12-13 | 1,327,421 | 90 |
| TOTAL | 5,362,754 | 380 |
| ANNUAL AVG. | 1,021,477 | 72 |

* Extra quarter included due to change in analysis timeframe

Table 63
Building Square Feet in Issued Non-Residential Building Permits
10/01/08 to 12/31/13

| Year | Retail | Office/Service | Manuf./Ext. Ind. | Govt. & Inst. | Other | TOTAL |
|----------------|----------------|------------------|------------------|------------------|----------------|------------------|
| 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 |
| 1/13-12/13 | 202,457 | 490,437 | 383,615 | 216,024 | 34,888 | 1,327,421 |
| TOTAL | 741,246 | 2,033,601 | 795,712 | 1,380,351 | 411,844 | 5,362,754 |
| PERCENT | 13.8% | 37.9% | 14.8% | 25.7% | 7.7% | 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 64. These factors are multiplied times the square footage of planned building space which is included on approved site development plans and building permits.

Table 64
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, 2013 to December 31, 2013 could accommodate an estimated 2,645 employees (Table 65). About 40% of the potential jobs are located in the Southeast with a mix of job types. About 28% of the potential jobs are located in Columbia. About 24% of the jobs are in Elkridge. Only 8% of the new jobs are in Ellicott City.

Countywide, about 1,520 potential jobs, about 58% of the total, are office/service jobs. Another 440 are retail jobs (17%). This is followed by 356 manufacturing/extensive industrial jobs (14%) and 329 government & institutional jobs (13%).

Table 65
Potential Employment from Approved Non-Residential SDP's
By Use Category, 1/1/13 to 12/31/13

| Region | Office/ Manuf./ Govt. | | | | TOTAL | PERCENT |
|--------------------|-----------------------|--------------|--------------|--------------|---------------|-------------|
| | Retail | Service | Ext. Ind. | & Inst. | | |
| Downtown Columbia | 223 | 0 | 0 | 0 | 223 | 8% |
| All Other Columbia | 164 | 269 | 89 | 0 | 521 | 20% |
| Elkridge | 0 | 432 | 2 | 191 | 626 | 24% |
| Ellicott City | 0 | 146 | 0 | 63 | 209 | 8% |
| Rural West | 0 | 0 | 0 | 0 | 0 | 0% |
| Southeast | 54 | 673 | 265 | 75 | 1,067 | 40% |
| TOTAL | 440 | 1,520 | 356 | 329 | 2,645 | 100% |
| PERCENT | 16.6% | 57.5% | 13.5% | 12.5% | 100.0% | |

Job Potential from Issued Building Permits

As shown in Table 66 below, there is a potential of 3,284 new jobs that could be accommodated based on issued building permits. About 60% of the total are potential office/service jobs, mostly in the Southeast. This is followed by 15% retail jobs, 12% manufacturing/extensive industrial jobs and 13% government and institutional jobs.

Table 66
Potential Employment from Issued Building Permits
By Use Category, 1/1/13 to 12/31/13

| Region | Office/ Manuf./ Govt. | | | | TOTAL | PERCENT |
|--------------------|-----------------------|--------------|--------------|--------------|---------------|-------------|
| | Retail | Service | Ext. Ind. | & Inst. | | |
| Downtown Columbia | 224 | 0 | 0 | 0 | 224 | 7% |
| All Other Columbia | 89 | 801 | 25 | 88 | 1,004 | 31% |
| Elkridge | 0 | 0 | 54 | 192 | 245 | 7% |
| Ellicott City | 179 | 139 | 0 | 77 | 395 | 12% |
| Rural West | 0 | 0 | 1 | 22 | 23 | 1% |
| Southeast | 14 | 1,021 | 304 | 53 | 1,391 | 42% |
| TOTAL | 506 | 1,962 | 384 | 432 | 3,284 | 100% |
| PERCENT | 15.4% | 59.7% | 11.7% | 13.2% | 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 2011 was not reported by the State.

Table 67 shows both DLLR and BEA employment data beginning in 2000. BEA data have a two year lag time resulting in no available data for 2012 and 2013. 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 13 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 2011 (the latest year available) result in an annual average of 3,367 new jobs from 2000 to 2011.

For the most recent reporting period, from 2012 to 2013, the State reports an increase of 1,896 jobs in Howard County. This is the third 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).

Table 68 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2012 and 2013. In the first quarter of 2013, DLLR reported that there were 156,400 jobs in Howard County with an average weekly wage of \$1,188. This compares to 154,504 jobs one year earlier with an average wage of \$1,205. This is a 1.4% decrease in average weekly wages over the one year time period.

Table 67
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 | 188,353 | 2,544 |
| 2008 | 147,573 | 2,188 | 189,755 | 1,402 |
| 2009 | 142,266 | (5,307) | 187,794 | (1,961) |
| 2010 | 141,169 | (1,097) | 189,961 | 2,167 |
| 2011 | 147,357 | 6,188 | 196,220 | 6,259 |
| 2012 | 154,504 | 7,147 | NA | NA |
| 2013 | 156,400 | 1,896 | NA | NA |
| Average | | 2,427 | | 3,367 |

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

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

Table 68
Jobs and Weekly Wages by Industry, 2012 and 2013

| Job Type | 2012 | | 2013 | |
|--------------------------------------|----------------|----------------|----------------|----------------|
| | Jobs | Avg. Wage | Jobs | Avg. Wage |
| Government Sector | | | | |
| Federal Government | 616 | \$1,482 | 601 | \$1,547 |
| State Government | 3,576 | \$1,020 | 1,506 | \$990 |
| Local Government | 14,392 | \$1,002 | 14,627 | \$1,020 |
| Subtotal/Average | 18,584 | \$1,021 | 16,734 | \$1,036 |
| Goods Producing | | | | |
| Natural Resources and Mining | 708 | \$689 | 257 | \$631 |
| Construction | 9,174 | \$1,142 | 9,661 | \$1,202 |
| Manufacturing | 6,850 | \$1,680 | 7,500 | \$1,431 |
| Subtotal/Average | 16,732 | \$1,343 | 17,417 | \$1,292 |
| Service Providing | | | | |
| Trade, Transportation, and Utilities | 31,471 | \$986 | 33,450 | \$963 |
| Information | 3,589 | \$1,808 | 3,825 | \$1,998 |
| Financial Activities | 8,803 | \$1,751 | 8,938 | \$1,747 |
| Professional and Business Services | 41,825 | \$1,693 | 41,596 | \$1,643 |
| Education and Health Services | 15,569 | \$828 | 16,072 | \$882 |
| Leisure and Hospitality | 13,373 | \$378 | 13,884 | \$366 |
| Other Services | 4,557 | \$666 | 4,485 | \$569 |
| Subtotal/Average | 119,187 | \$1,214 | 122,249 | \$1,195 |
| TOTAL | 154,504 | \$1,205 | 156,400 | \$1,188 |

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

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