



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

April 2018

Development Monitoring System Report

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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.) 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.

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 in planning 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 26th 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.

Development activity in Downtown Columbia is included in the DMS report given that the implementation of the Downtown Columbia Plan has begun.

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.

Most of the reporting requirements outlined in the Smart, Green and Growing legislation were already covered in this DMS report. There are some additional items, however, that are new. Thus, an additional 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 not included in this year's report but was included in last years.

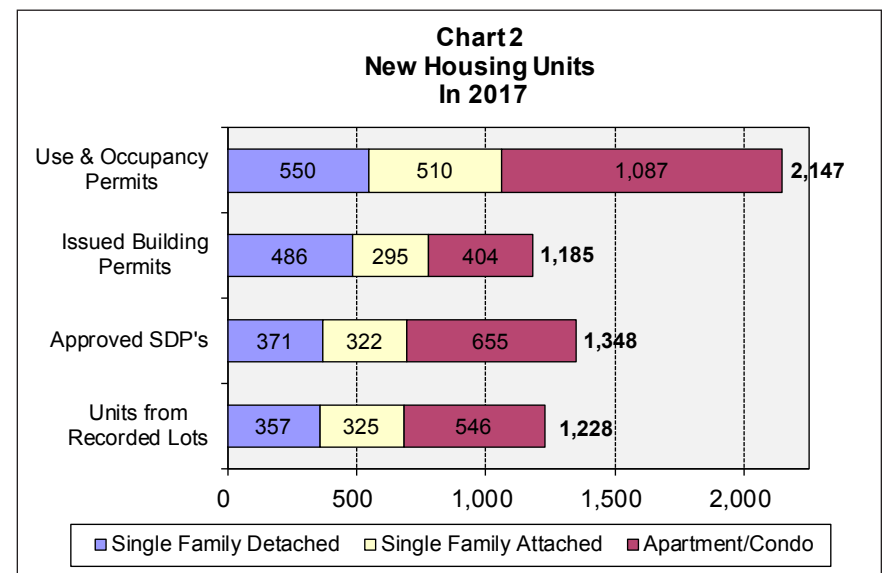
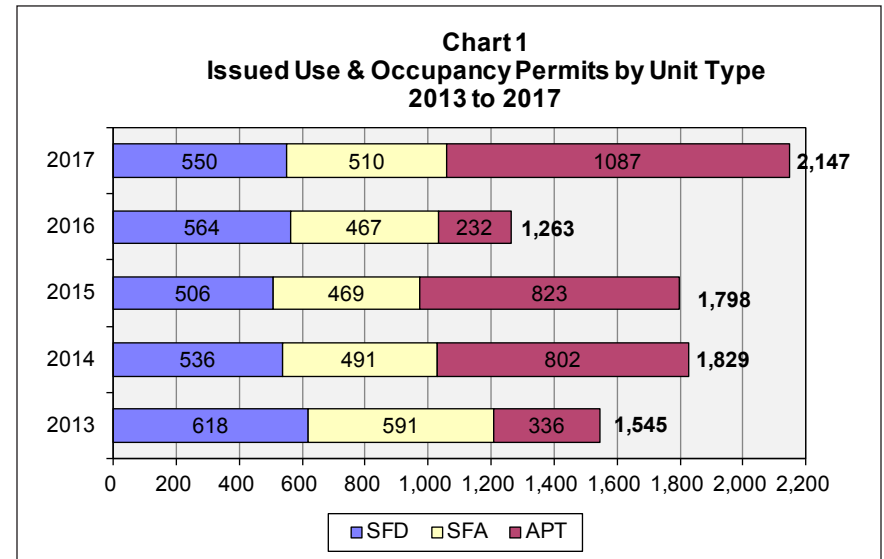
The reporting of these additional items meet the State planning requirements and also enable a better understanding of Howard County's land development issues, policies and goals.

Residential Development

Total Housing Activity

- During the latest reporting period, from January through December 2017, 2,147 housing units were built. This is an increase from the previous reporting period when 1,263 units were built, and the greatest number built over the last five years (Chart 1).
- Of the 2,147 completed units last year, 26% were single family detached units, 24% were townhouse units and 50% were 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.
- Over the last five years, there has been an annual average of 1,716 new housing units built in the County. About 32% of these have been single family detached units, 29% single family attached or townhouse units, and 38% apartment units (including both rental and condo).
- Last year, 36% of all units were built in the Southeast, 23% in Elkridge, 15% in Ellicott City, 13% in non-Downtown Columbia, 7% in Downtown Columbia and 5% in the Rural West. (See the map on Page 6 that show these five planning areas.)
- There were 1,185 building permits issued (housing starts) during 2017 (Chart 2). This is 52% less than the 2,475 permits issued in 2016.
- In 2017, there was potential for 1,228 housing units from recorded lots and 1,348 units approved in site development plans (Chart 2).
- As of December 31, 2017, there were 8,732 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 9,245 units in process for the prior reporting period (December 31, 2016). Many of these units are part of phased plans.
- A significant number of the in-process units—6,962 or 78% of the total 8,732—are included in future phases of phased projects with development planned as far out as 2027. The larger phased plans include Laurel Park Station and Maple Lawn South in the Southeast; The Overlook at Blue Stream, Oxford Square, and the Park at Locust Thicket in Elkridge; Turf Valley and Westmount in Ellicott City; The Enclave at Tierney Farm and Simpson Oaks in Columbia; and the Crescent and Lakefront neighborhoods in Downtown Columbia.

- Countywide, 16% of the units in process on December 31, 2016, were single family detached units. About 15% were single family attached units and another 69% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 124 age-restricted housing units built in 2017, 6% of the 2,147 total units built in the County. Of these, 29 were single family detached units, 47 were townhouse units and 48 were apartment or condo units.
- As of December 31, 2017, there were no age-restricted units in the planning process. This is the first time there have been no age-restriction units in process since the tracking of them began in 2004. For the previous reporting period there were only 12 age-restricted units in process.
- Since the 2004/2005 DMS, which was the first time age-restricted units were reported soon after recently passed regulatory changes enabling more of these type of units, 18% of all new homes built in Howard County have been age-restricted.

Moderate Income Housing Units (MIHU)

- During 2017 there were 149 MIHU units in approved plans—26 townhouse units and 123 apartment or condo units. This is more than the 106 approved MIHU units the previous reporting period.
- As of December 31, 2017, there were 843 MIHU units in process—169 townhouse units and 674 apartment or condo units. About 38% of the units are in ElkrIDGE, 37% in Downtown Columbia, 19% in the Southeast, and 6% in Ellicott City. There were 891 MIHU units in process the previous reporting period.
- Of the 891 MIHU units in process, none are in age-restricted projects.

Rural Land Preservation

- In 2017, six purchase settlements totalling 438 acres were added to the County's Agricultural Land Preservation Program. An additional 197 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 31,662 acres. This includes 22,763 acres of agricultural preservation easements and 8,899 acres of environmental preservation parcels dedicated through the subdivision process. This totals 33% of all land in the Rural West. Including park land, WSSC land and other environmental easements, 46% of the Rural West is now permanently preserved.

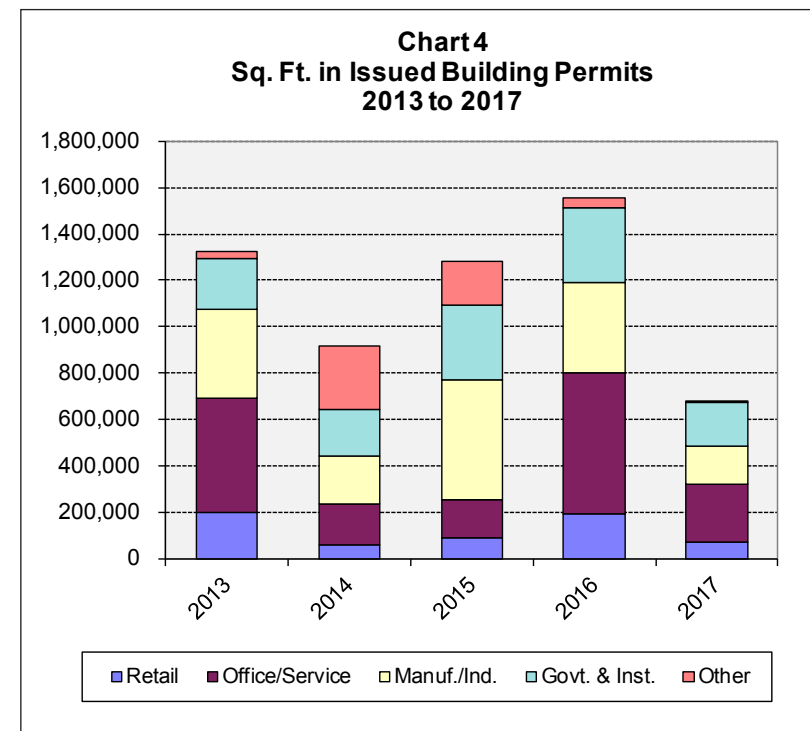
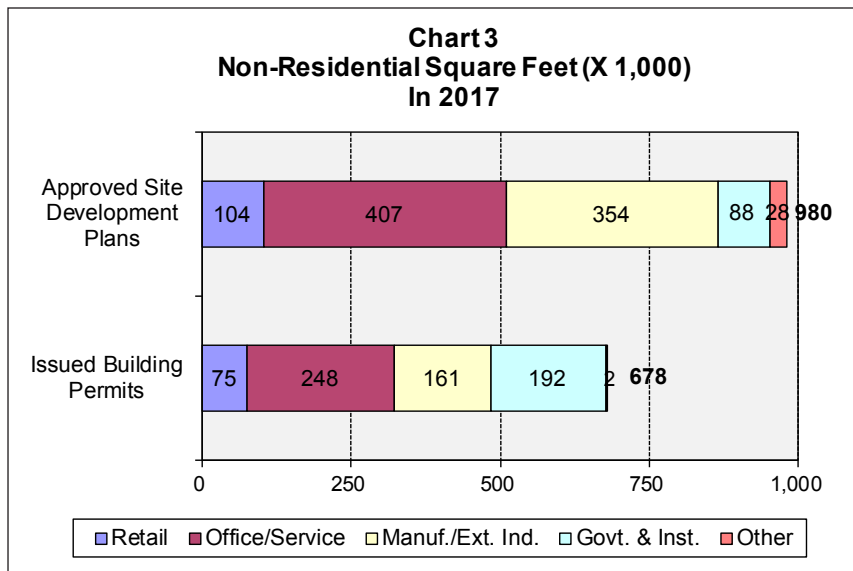
Land Preservation in the East

- In 2017, no land was preserved in eastern Howard County as part of the Neighborhood Preservation Program. That program, which began in 2008, currently includes a total of 73 acres of permanently preserved land in the east and has allowed for the density transfer of 49 dwelling units to other parts of eastern Howard County.
- Including all other preservation easement types—historic, Maryland environmental and other land trusts, and agricultural easements—a total of 693 acres are permanently preserved in eastern Howard County.
- When including County and State parks, WSSC land, non-County open space such as HOA land and Columbia Association open space, the total preserved land in eastern Howard County is 18,506 acres, 28% of all land in the east.

Non-Residential Development

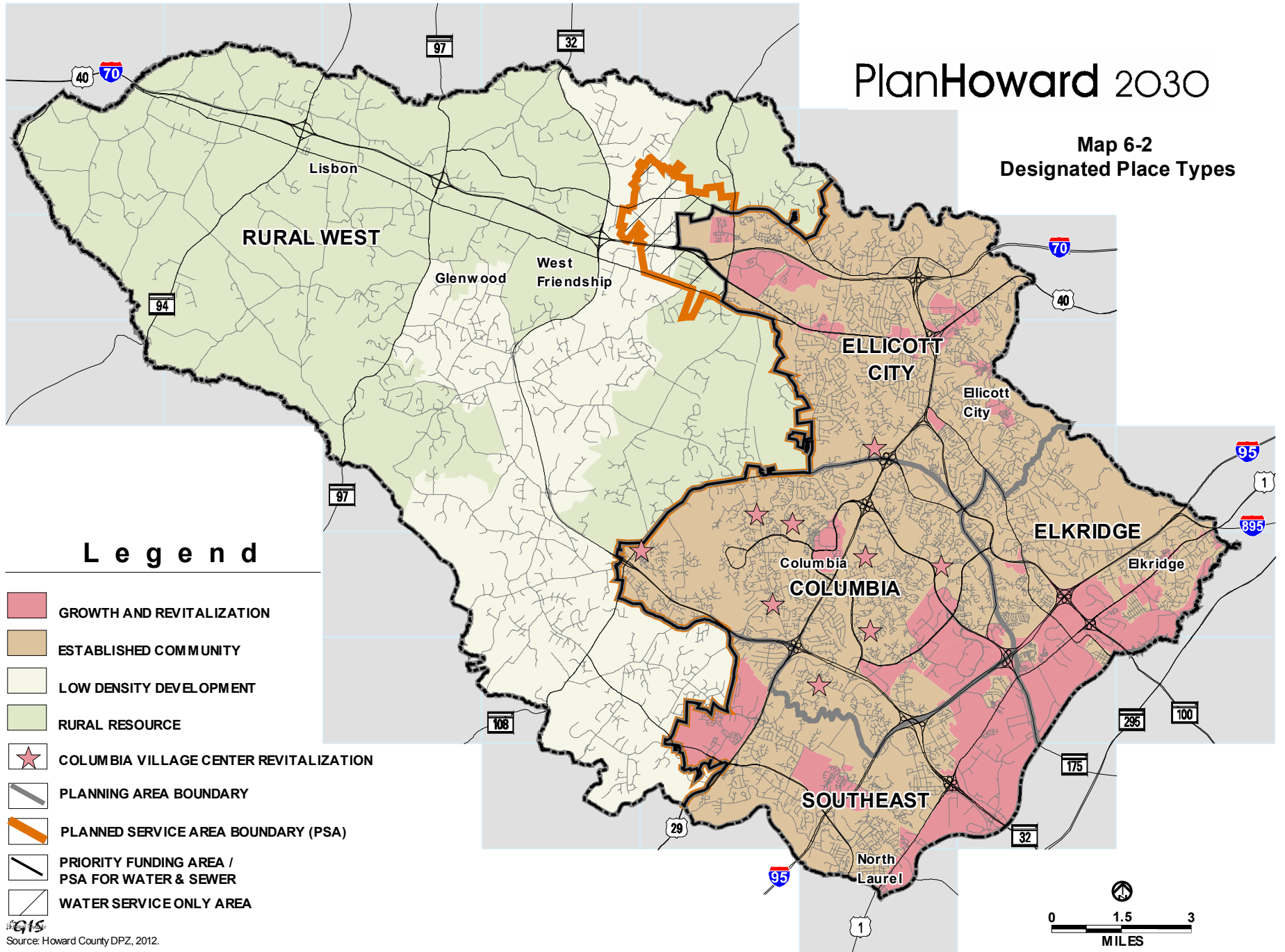
- In 2017, 980,000 square feet of building space were approved in site development plans. Building permits were issued for almost 700,000 square feet. (Chart 3).
- As shown in Chart 4 there was a decrease in the square footage of issued building permits last year, from 1.56 million square feet issued in 2016 to 678,000 square feet issued in 2017, which was the least amount in the last five years.
- About 38% of the new building space constructed last year is located in the Southeast and 24% in the non-Downtown parts of Columbia. About 15% of the total was constructed in Ellicott City, 10% in Elkridge, 7% in the Rural West, and 6% in Downtown Columbia.
- Over the last five years, there was an annual average of 932,000 square feet in approved non-residential site development plans and 1.15 million square feet in issued non-residential building permits.

- As of December 31, 2017, there were 1.8 million square feet of building space under plan review in non-residential site development plans. This is more than double the 870,000 square feet under review the previous year.
- According to the State Department of Labor, Licensing and Regulation, Howard County gained 2,154 jobs last year (1st quarter 2016 to 1st quarter 2017 estimates). The total number of jobs in Howard County as of the 1st quarter 2017 was 167,701.



PlanHoward 2030

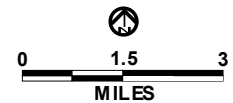
Map 6-2
Designated Place Types



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. Note that this DMS report also include 5 year development summaries and other information that satisfy the more recent 2013 amendments to the Smart, Green and Growing legislation.

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 Related Legislation in Support of the General Plan

The following highlights General Plan amendments and other adopted legislation in 2017 in support of the current General Plan, known as *Plan-Howard 2030*.

CB 3-2017 — Ellicott City Flood Response Funding

This bill amends the Annual Budget and Appropriation Ordinance for Fiscal Year 2017 in order to fund unanticipated expenses related to the Ellicott City flood response and recovery efforts, increasing the General Fund for certain departments.

CB 6-2017 — Restoration and Rehabilitation of Historic or Heritage Properties Tax Credits

This bill clarifies the definition of eligible properties, clarifies certain qualified expenses for purposes of qualifying to receive the tax credit, clarifies the process to receive the tax credit, removes certain obsolete provisions, and makes certain technical corrections related to the tax credit for the restoration and rehabilitation of historic or heritage properties.

CB 7-2017 — Livable Homes Tax Credit for Accessibility Features

This bill amends the Livable Homes Tax Credit in order to amend the features for which one may receive the tax credit, adds certain features, amends the amount of the credit that may be received, and amends certain reporting requirements relating to real property tax credits.

CB 15-2017 — Howard County Right to Farm Act

This bill further states the purpose of the Howard County Right-To-Farm Act, recommends certain legal fees under certain conditions, and generally relates to the Howard county Right-To-Farm Act.

CR 16-2017 — Howard County Watershed Protection Restoration Fee

This resolution adds a one-time reimbursement amount related to the Watershed Protection and Restoration Fee.

CB 23-2017 — Agricultural Preservation Program

This bill amends the Howard County Code to clarify that parcels may be eligible for the County's Agricultural Land Preservation Program notwithstanding the effect of the Growth Tier designation of the parcel on the County's General Plan.

CB 20-2017 — Office of Transportation and Public Transportation Board

This bill amends the qualifications of the Administrator of the Office of Transportation and the duties of the Office of Transportation, amends the general powers and duties of members of the Public Transportation Board, and adds the Office of Transportation to agencies serving on the Subdivision Review Committee.

CB 47-2017 — Agricultural Preservation Installment Purchase Agreement

This bill approves and provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights on approximately 109.07 acres of agricultural land located at 755 East Watersville Road, Mt. Airy, Howard County, Maryland, at a maximum purchase price of \$3,404,600.

CB 19-2017 — Agricultural Preservation Installment Purchase Agreement

This bill approves and provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights on approximately 20.56 acres of agricultural land located at 1401 Woodbine Road, Howard County, Maryland, at a maximum purchase price of \$536,500.

CB 25-2017 — *PlanHoward 2030* Technical Correction

This bill approves a technical correction and ensures that *PlanHoward 2030* is consistent with amendments adopted by the passage of CB 53-2016, a part of the Downtown Columbia affordable housing provisions. The bill corrects a chart to correspond to an amendment that was passed under CB 53-2016.

CB 33-2017 — Route 1 Tax Credit

This bill amends an uncodified section in Council Bill No. 9-2014 in order to extend the Renovated, Upgraded, or Rehabilitated Property Adjacent to Route 1 tax credit, and provides that applications for the credit received by a certain date will be eligible to receive the credit the full four years of the credit.

CB 34-2017 — High Performance Buildings Tax Credit

This bill extends the life of the tax credit for certain high performance LEED certified buildings until June 30, 2023, amends certain definitions, and requires certain reviews prior to the expiration of the credit.

CB 47-2017 — Agricultural Preservation Installment Purchase Agreement Program Reauthorization

This bill authorizes and empowers Howard County, Maryland, to enter into installment purchase agreements to acquire development rights in agricultural lands located within the County, for an aggregate purchase price of not more than \$29,801,632, plus interest thereon.

CR 52-2016 — Howard County's Annual Housing Action Plan

This resolution adopts Howard County's Annual Action Plan for housing and community services to qualify for the receipt of federal Community Development Block Grant and Home Investment Partnership Program funds.

CB 57-2017 — Agricultural Preservation Installment Purchase Agreement

This bill approves and provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights on approximately 50.09 acres of agricultural land located on the east side of Manor Lane, Howard County, Maryland, from the Ziegler Family Irrevocable Trust at a maximum purchase price of \$1,303,400.

CB 58-2017 — Agricultural Preservation Installment Purchase Agreement

This bill approves and provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights on approximately 61.52 acres of agricultural land located on Manor Lane, Howard County, Maryland, from The Trust FBO Thomas Lee Carroll at a maximum purchase price of \$1,955,200.

CB 73-2017 — Department of Planning and Zoning Technical Staff Reports

This bill amends the Howard County Code to require that Department of Planning and Zoning Technical Staff Reports and Planning Board Recommendations be submitted to the County Council prior to the addition of any land use legislation to the Council's Legislative Agenda.

CB 75-2017 — Fixed Route Bus Purchase

This bill approves a Multi-Year Tax-Exempt Lease/Purchase Agreement for financing the acquisition of six new buses to be used as part of the Regional Transportation Agency's fixed-route fleet.

CR 95-2017 — Land Preservation and Recreation Plan

This resolution adopts the 2017 Howard County Land Preservation & Recreation Plan.

CR 98-2017 — Long Reach Urban Renewal Project

This resolution approves the urban renewal project for the Long Reach Village Center in Columbia pursuant to Section 13.1106 of the Howard County Code.

CR 124-2017 — Enlarging Downtown Columbia TIF Area

This resolution enlarges the Downtown Columbia area of Howard County designated as the development district by County Council Resolution 105-2016 for purposes of the State Tax Increment Financing Act.

CR 119-2017 — Economic Opportunity and Prosperity Task Force

This resolution creates an Economic Opportunity and Prosperity Task Force to identify and study policies, programs, and potential legislation to facilitate economic growth and increase economic opportunities for individuals, businesses, and organizations in Howard County and to make recommendations to the Howard County Council and Howard County Executive.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County in 2017.

CB 22-2017 — Rural Conservation (RC) and Rural Residential (RR) Districts

This bill amends the Howard County Zoning Regulations exempting farms in the Rural Conservation (RC) Zoning District and farms 20 acres or larger in the Rural Residential (RR) Zoning District from animal shelter and riding academy and stable setback requirements from dwellings on future new residential lots.

CB 28-2017 — Cottage Food Businesses

This bill amends the Howard County Zoning Regulations to define Cottage Food Business and allow Cottage Food Business as a Home Occupation.

CB 29-2017 — Business Rural Crossroads (BRX)

This bill amends the Howard County Zoning Regulations to remove the Business Rural Crossroads (BRX) zoning district.

CB 31-2017 — Instructional School Conditional Use

This bill amends the Howard County Zoning Regulations Conditional Use section to add a new Instructional School use to the R-20 Zoning District. This includes schools providing instruction in music, dance, martial arts, yoga, and meditation practice.

CB 32-2017 — Historic Buildings Conditional Use

This bill amends the Howard County Zoning Regulations to make certain Neighborhood Preservation sending parcels eligible for a Conditional Use for Historic Building Uses.

CB 53-2017 — New Storage Use Category

This bill amends the Howard County Zoning Regulations to establish a new use category of Storage or Use of Trailers, Modular Offices, Shipping Containers, and Refuse Containers.

CB 59-2017 — Country Inns Conditional Use

This bill amends the Howard County Zoning Regulations Conditional Use section to allow Country Inns in the Residential Village Housing (R-VH) Zoning District, under certain condition, and generally relating to Country Inns.

Subdivision & Land Development Regulation Amendments (and related)

The following highlights amendments to the Subdivision & Land Development Regulations (and other related land use code amendments) that were approved in Howard County in 2017.

CB 5-2017 — Clarifying That Certain Court-Ordered Petitions of Real Property are not Included in Definitions of Minor Subdivisions

This bill amends the Subdivision and Land Development regulations to clarify that court-ordered partitions of real property under certain conditions are not included within the definitions of minor subdivision or resubdivisions.

CB 4-2017 — Review of Howard County Design Manual

This bill requires periodic reviews and certain revisions to the Howard County Design Manual, and generally relates to standards for design and construction in Howard County.

CR 96-2017 — Housing Unit Allocation Chart

This resolution adopts the Housing Unit Allocation Chart for Fiscal Year 2018 pursuant to the Adequate Public Facilities Act of Howard County.

CR 97-2017 — Open/Closed School Chart

This resolution adopts the Open/Closed Chart, pursuant to the Adequate Public Facilities Act of Howard County, to designate the school regions and school districts that are open for residential development.

CR 94-2017 — Design Manual Volume I Revision

This resolution revises Volume I (Storm Drainage) of the Design Manual to mandate a specified amount of rainfall for 100-year storms, clarifies provisions related to open channels, and amends provisions related to stormwater management facilities in Howard County.

CR 138-2017 — Design Manual Volume III Revision

This resolution adopts a comprehensive revision of Volume III (Roads and Bridges) of the Design Manual to revise the criteria and standards for the design of road systems in Howard County.

CR 139-2017 — Design Manual Volume IV Revision

This resolution adopts a comprehensive revision of Volume IV (Standard

Specifications and Details for Construction) of the Design Manual to revise the standards and specifications relating to the construction of roads and utilities in Howard County

Zoning Map Amendments

The following highlights all zoning map amendments including the amendment number, name, and description that were approved in Howard County during 2017. Map 1 shows the location of each.

ZB 1107M-2017 — Old Scaggsville, LLC

To rezone 1.99 acres of land located on the northwest corner of the intersection of Scaggsville Rd and Old Columbia Rd from RR-MXD-3 (Rural Residential: Mixed Use) to B-1 (Business: Local).

ZB 1108M-2017 — Kevin and Maria Garvey

To rezone .70 acres of land on the east side of MD 97 approximately 500 feet south of McKendree Rd from POR (Planned Office Research) to RR-DEO (Rural Residential: Density Exchange Option).

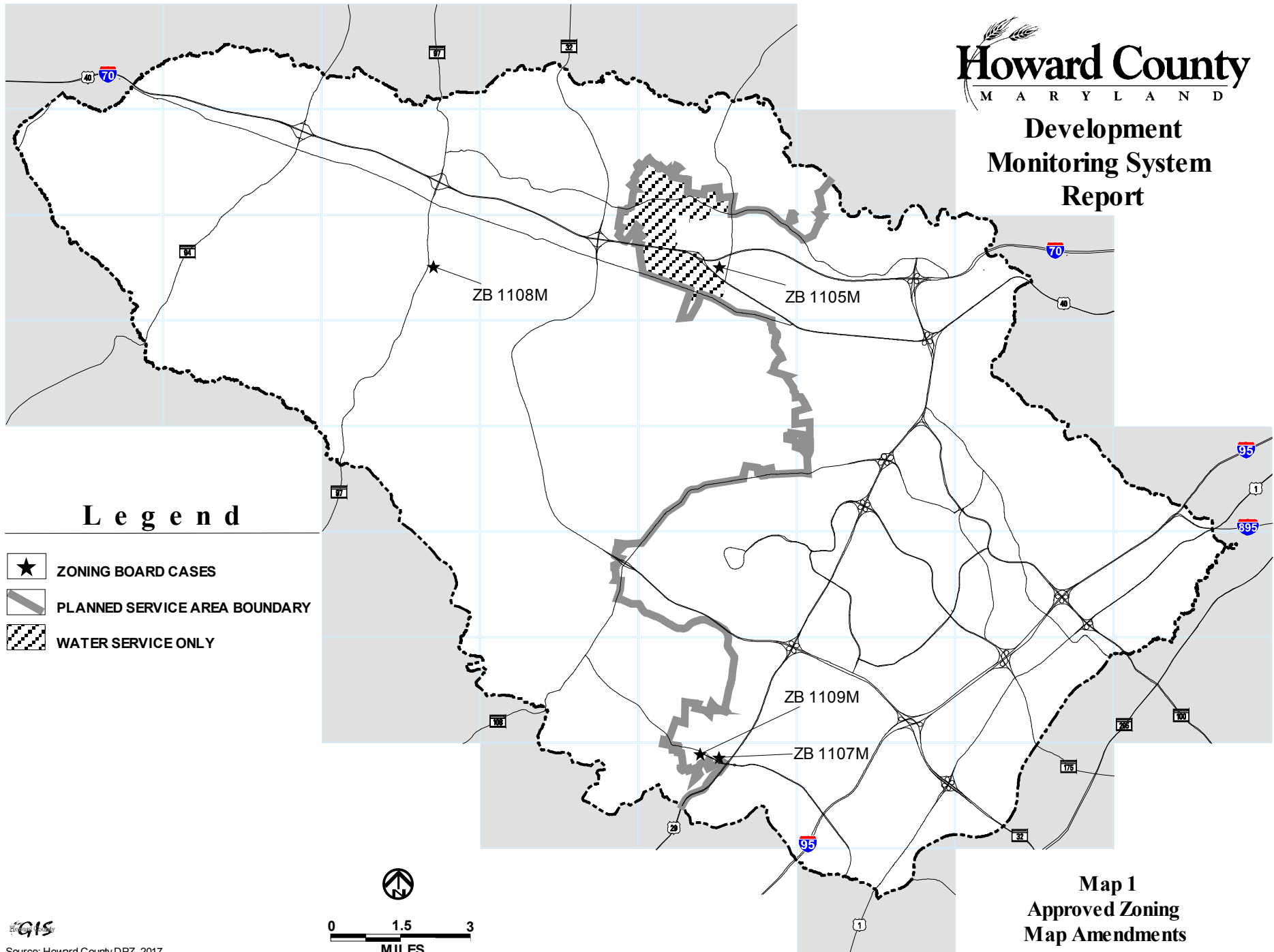
ZB 1105M-2017 — Chapelgate Presbyterian Church

To rezone 61.83 acres of land located on the northwest quadrant of the intersection of US 40 and Marriottsville Rd from R-20 (Residential: Single) to CEF-M (Community Enhancement Floating-Mixed Use).




ZB 1109M-2017 — Bozzuto Homes, LLC

To rezone 3.70 acres of land located southeast of the roundabout intersection of Scaggsville Rd (MD 216), Old Columbia Rd, and West Side Blvd. from RR-DEO (Rural Residential: Density Exchange Option) to R-SA-8 (Residential: Single Attached).

**Development
Monitoring System
Report**



Legend

-  ZONING BOARD CASES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

**Map 1
Approved Zoning
Map Amendments**

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2017, 4.42 miles of new or extended roadway were constructed in Howard County. These additions were built in 10 new subdivisions as part of developer's agreements executed with the County. A portion of one roadway was abandoned in 2017, the removal of 0.36 miles of Oakland Mills Road as part of the construction of Blandair Park. Other road improvements not directly associated with new subdivisions include: adding new turn lanes to Governor Warfield and Little Patuxent Parkways in Downtown Columbia, adding an acceleration/deceleration lane onto Cedar Lane from MD Route 32, the widening of Guilford Road east of Kindler Road, and the construction of a new mini-roundabout on Port Capital Drive at the intersection of New Colony Boulevard and Harbor Drive.

Detailed information about all roadway construction projects is documented in Howard County's 2017 annual report to the State Highway Administration. The road additions are all shown on Map 2.

School Additions and Renovations

The Howard County Public School System completed two major projects in 2017. Renovation and expansion efforts continue to be concentrated within the priority funding area.

Patuxent Valley Middle School

The Patuxent Valley Middle School project was a complete renovation of the existing two-story school, originally built in 1989, including new mechanical, electrical and technology systems. Cluster teaching stations were reconfigured into self-contained classrooms, and additions were constructed for a new administration area with improved security and a COMAR compliant health suite. The balance of the interior spaces was reconfigured, providing better circulation with improved accessibility and new finishes. The existing modular classroom section was demolished and replaced with permanent classrooms. This project will receive a LEED certification.

Wilde Lake Middle School

The Wilde Lake Middle School project replaced the former single-story school, originally built in 1969, with a new state-of-the-art two-story net

zero facility. The new facility is 49% larger, accommodating 752 students. The school was constructed behind the original building which was later demolished and replaced with play fields and parking. The renovation was based on the sixth iteration of the middle school prototype which was updated to address current systemic and programmatic needs. The school was designed and partially funded in collaboration with the Maryland Environmental Agency as the first net zero school in the state. The use of solar panels and a geothermal system not only allows for greater energy efficiency, but also provides a teaching tool to students and staff through the use of the energy dashboard. This project is also slated to receive a LEED platinum certification.

Other Major Community Facilities and Infrastructure (valued at over \$1 million)

In 2017, the Elkridge Library and 50+ Center was renovated at a cost of \$16 million. About \$10 million was spent on Dorsey Run Road improvements including grading, sediment control, utilities and stormwater management improvements. A Bureau of Utilities building was renovated at a cost of \$7 million. The Little Patuxent interceptor sewer rehabilitation project was completed at a cost of \$4.5 million. Improvements to a pump station in Elkridge was completed at a cost of \$1.6 million. Interior alterations for the Police Department's Gempler Building was completed at a cost of \$1.3 million. The Trotter Road Water and Sewer extension project was also completed at a cost of \$1.3 million.

In 2017, the County completed the construction of one of the nation's first wireless bus charging systems and placed three electric transit buses into service. The wireless charging system, located at the RTA's transit hub at the Mall in Columbia, uses an inductive system embedded into the ground to recharge buses. The total cost to deliver the project was \$3.3 million. The County also placed 15 fixed route and paratransit buses into service in 2017, for a total cost of \$3.3 million. In addition, pads, shelters and other passenger amenities were built at 38 bus stops for a total cost of \$257,000.

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, all the major community facilities and school projects that have been completed in 2017 are located within the Priority Funding Area. Furthermore, many of the bills and resolutions adopted by the Howard County Council support the furtherance of many *PlanHoward 2030* goals and objectives. This includes the historic, livable homes, and Route 1 tax credit legislation, the approval of the Long Reach Urban Renewal project, updates to the Howard County Design Manual, the adoption of the 2017 Land Preservation and Recreation Plan, and the various zoning regulation and map amendments, among other action items listed beginning on Page 8 above.

APFO Restrictions

The State of Maryland's Smart, Green and Growing legislation requires that each locality report and explain APFO restrictions that are within their Priority Funding Area (PFA). Starting July 1, 2010 local jurisdictions' first APFO reports were due to the Maryland Department of Planning, then every two years thereafter. Howard County DPZ first reported on this in 2010. This is the fifth 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 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 2017

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, parks, commu-

nity, public safety, and other public infrastructure.

At the end of 2017, there were no residential subdivisions delayed due to allocation limitations. The Allocations chart, which must be approved by the County Council, is adopted each July. The current chart was adopted on July 7, 2017. Under Howard County's latest General Plan, *PlanHoward 2030*, allocations are now distributed in this adopted chart by Designated Place Type, and no projects were in the waiting bin for allocations in each of these designated areas at the end of 2017.

Prior to the adoption of this latest chart in July 2017, there were also no subdivisions delayed due to allocation limitations. This is the second year in a row this has occurred, and the first time in the history of Howard County's APFO where there have been no projects on hold due to allocation limitations. For all previous years beginning with the adoption of APFO in 1992, projects have been delayed due to allocation limitations. The last two years were an exception. This reflects the recent slowdown of new subdivision projects submitted for review and approval.

Closed School Restrictions in 2017

As indicated above, after a development project receives allocations, it then takes the 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 20 middle schools, each in their own district. The elementary schools are divided up into six elementary school regions.

At the end of 2017 there were 9 closed elementary school districts including all districts in the northern elementary school region which is closed (Talbot Springs, Centennial Lane, Hollifield Station, Manor Woods, Northfield, St. Johns Lane, Waverly, Forest Ridge, and Fulton) and 6 closed middle school districts (Harpers Choice, Ellicott Mills, Thomas Viaduct, Burleigh Manor, Dunloggin, and Murray Hill). This resulted in a total of 804 housing units in 30 subdivision plans on hold due to closed school districts.

A new elementary school, recently named Hanover Hills, is under construction in ElkrIDGE near the Oxford Square development. It is scheduled to open in the fall of 2018 and will help to increase elementary school

capacity in the northeast part of the county. Planned additions to Dunloggin and Ellicott Mills middle schools will add additional middle school capacity. A new high school is planned to open in 2023. The school capital budget includes other new schools and school additions in the outer years based on planned residential growth.

Recent Revisions to APFO

The County Executive convened and a APFO task force in 2015. The 26 member task force met over eight months and developed a series of recommendations on amendments to the law. DPZ evaluated the recommendations and prepared a technical staff report on proposed changes. The proposed amendments were presented to the Board of Education, the Planning Board and the County Council. The public had an opportunity to opine through several public hearings. The County Council adopted legislative changes APFO resulting from this process in early 2018.

The major changes include: 1) exempting moderate income housing units from the allocations requirement, 2) exempting certain low income housing tax credit projects from the schools test on a case by case basis by County Council resolution, 4) eliminating the shared Growth and Revitalization and Established Communities allocation area, 5) decreasing the Growth and Revitalization area from 1,200 allocations per year to 1,000 per year and increasing the Established Communities area allocations to 600 per year from 400 per year, 6) limiting the wait time for projects that are on hold due to the allocations test and schools test to a combined 7 years, 8) lowering the capacity utilization percentage when elementary districts and regions are closed to development from 115% to 105%, and lowering middle school districts from 115% to 110%, and 9) adding a high school district test at a 115% threshold.

The last two items (8 and 9) are not effective until 2019 and will likely have a major impact on development. Unless the Howard County Public School System undergoes a comprehensive redistricting to utilize available systemwide capacity in the near term, it is estimated that as much as 90% of all new residential development will be delayed for up to 4 years due to closed schools.

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 2017. Progress on land preservation is also reported on. The Smart, Green and Growing legislation also requires 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 2011, they decided upon a methodology which is to calculate the number of units built divided by the unit 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.

Lot Density by Planning Area

Table 1 shows the lot density of residential development in Howard County in 2017 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 2017, but the project 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 completed. This also applies to rental and condo apartments and condo townhomes.

The greatest average lot density occurred in Downtown Columbia at 144 units per acre for the 160 unit Little Patuxent Square project. This was followed by all other Columbia at 70 units per acre, Elkridge at 31 units per acre, Ellicott City at 11 units per acre, and the Southeast at 35 units per acre. The Rural West, as expected, had the lowest average lot density at 0.84 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 40 units per acre. This compares to a much smaller lot density of 0.84 units per acre outside the PFA.

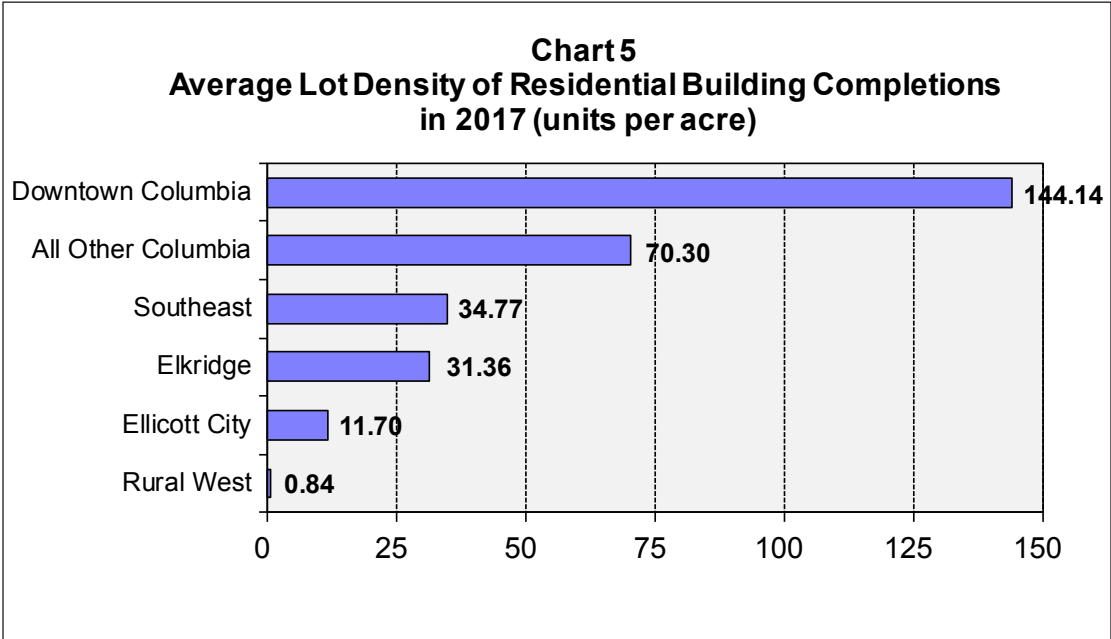
Map 3 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2017 - By Planning Area

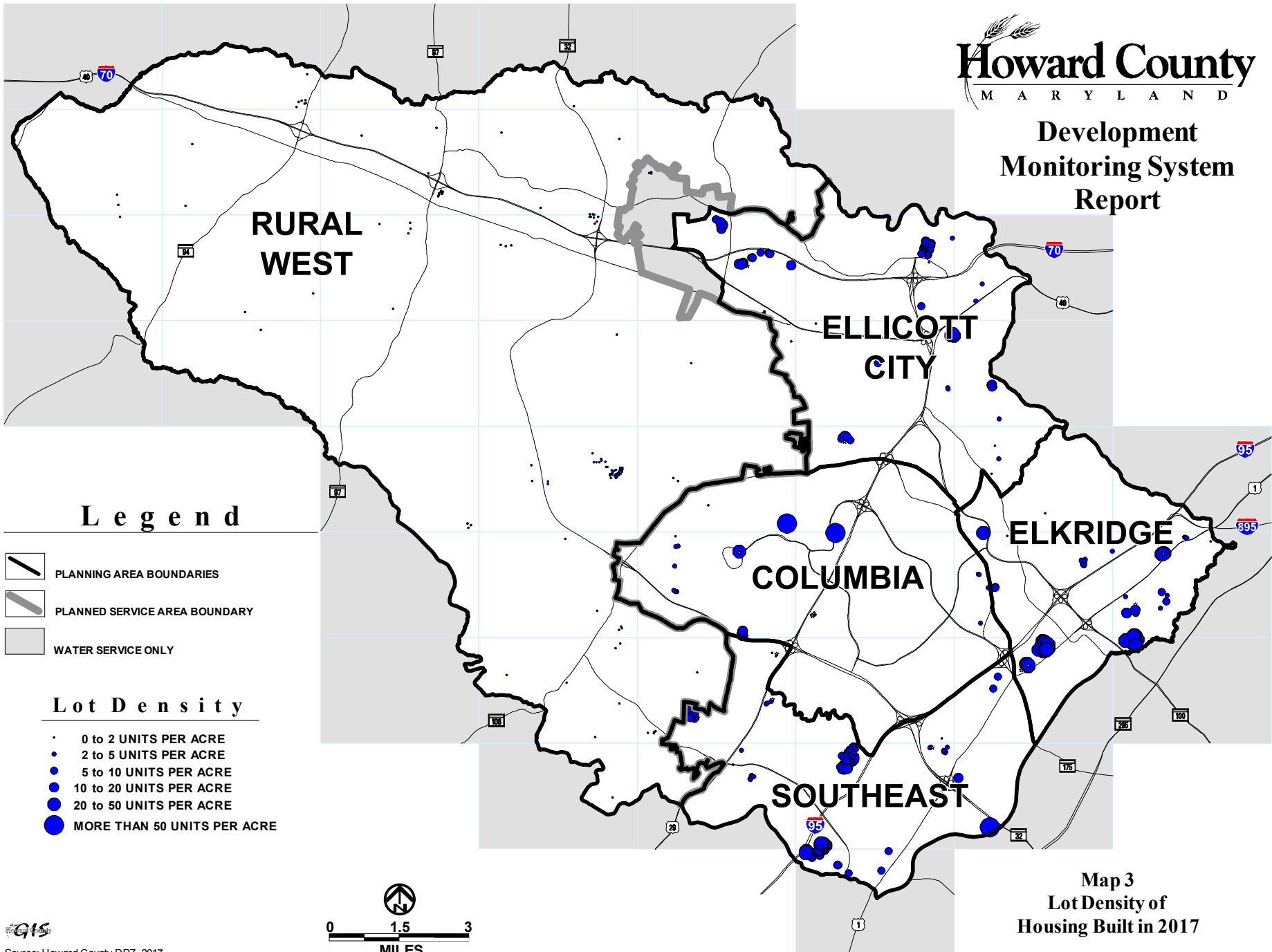
Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Downtown Columbia	160	6%	1	0%	144.14
All Other Columbia	276	11%	13	3%	70.30
Elkridge	764	30%	34	8%	31.36
Ellicott City	474	18%	59	15%	11.70
Rural West	116	5%	227	56%	0.84
Southeast	779	30%	69	17%	34.77
TOTAL	2,569	100%	403	100%	38.60

Table 2
Lot Density of Total Units Built in 2017 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	2,453	95%	176	44%	40.38
Outside PFA	116	5%	227	56%	0.84
TOTAL	2,569	100%	403	100%	38.60



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Source: Howard County DPZ, 2017.

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 been 150 per year just prior to *PlanHoward 2030* based on recent amendments to APFO. Prior to that, with the adoption of the 2000 General Plan in November 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 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 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* from 2017 to 2030. A total of 1,300 new units are allocated to areas outside the PFA, representing only 4.9% of all units countywide. The remaining 95.1% of future units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2017, unit counts, 12.2% of all housing units in the County are outside the PFA. The remaining 87.8% are inside the PFA. This is summarized in Table 4.

Comparing this to the *PlanHoward 2030* policy of allocating only 4.9% 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 the sum of total units currently built plus those newly allocated by 2030. The percentage of total units outside the PFA will decrease between now and then, from 12.2% currently to 10.8% in 2030.

Table 3
PlanHoward 2030 Growth Projections
2017 to 2030

Inside PFA	25,450	95.1%
Outside PFA	1,300	4.9%
Total	26,750	100.0%

Table 4
Total Built Units in Howard County
September 30, 2017

Inside PFA	103,371	87.8%
Outside PFA	14,372	12.2%
Total	117,743	100.0%

Table 5
Total Units by 2030 based on PlanHoward 2030

Inside PFA	128,821	89.2%
Outside PFA	15,672	10.8%
Total	144,493	100.0%

Resources to Achieve Goal

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

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 the 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 2017 were recorded or in existence prior to 2013, the first year of this current DMS analysis period. Therefore, units from 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, 2017, through December 31, 2017, there was potential for 1,229 housing units from recorded lots countywide in 84 subdivision plans totaling 1,746 acres (Table 6). Elkridge had the most with 572 units, 47% of the total. Downtown Columbia had 202 units, 26% of the total. Ellicott City had potential for 189 units, 15% of the total. There were 127 units in recorded subdivision plans in the Southeast (10%), 85 units in the Rural West (7%), and 54 units in the rest of

Columbia. 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 and apartment units are included in the unit total for large parcel recordations.

Of the total 1,746 acres recorded, 935 acres, or about 54%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity given that these figures include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

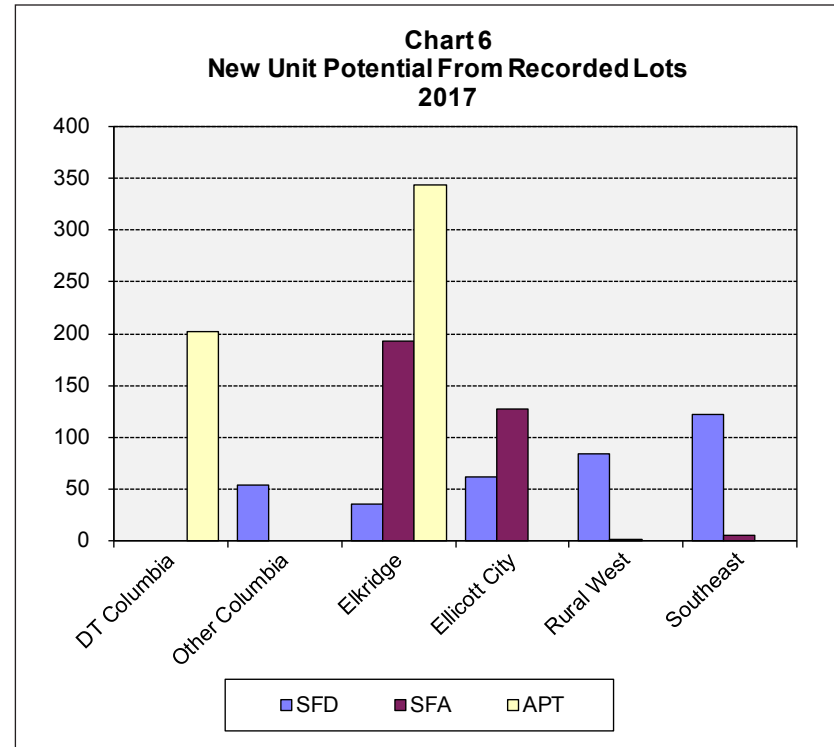
Table 7 shows new units from recorded lots by unit type. Of the 1,228 units from recorded lots, 357 are for single family detached units (SFD), 325 are for single family attached or townhouse units (SFA), and 546 are for apartment units (APT). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions in 2017

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	202	16%	1	1%	3	0%
All Other Columbia	54	4%	7	8%	160	9%
Elkridge	572	47%	12	14%	108	6%
Ellicott City	189	15%	21	25%	410	23%
Rural West	84	7%	24	29%	935	54%
Southeast	127	10%	19	23%	131	7%
TOTAL	1,228	100%	84	100%	1,746	100%

Table 7
Unit Potential from Recorded Lots by Unit Type in 2017

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	202	0	202	16%
All Other Columbia	54	0	0	0	54	4%
Elkridge	35	193	344	0	572	47%
Ellicott City	62	127	0	0	189	15%
Rural West	84	0	0	0	84	7%
Southeast	122	5	0	0	127	10%
TOTAL	357	325	546	0	1,228	100%
PERCENT	29%	26%	44%	0%	100%	



Last Year's Projects - Greater than 20 Units

Of the total 1,228 units from lots recorded for the latest reporting period, 1,082 or about 88% were in subdivisions consisting of more than 20 units. These larger subdivisions, shown in Table 8, are located in all six planning areas. The precise location of these plans are shown on Map 4.

These larger recorded plans include the final development plan for the Crescent Arts Center in Downtown Columbia; Howard Square, Oxford Square, and Shipley's Grant in Elkridge; the Fairways at Turf Valley, Westmount, and Waverly Grove in Ellicott City; Fairlaine Farm in the Rural West; and Maple Lawn South and Honeysuckle Ridge in the Southeast.

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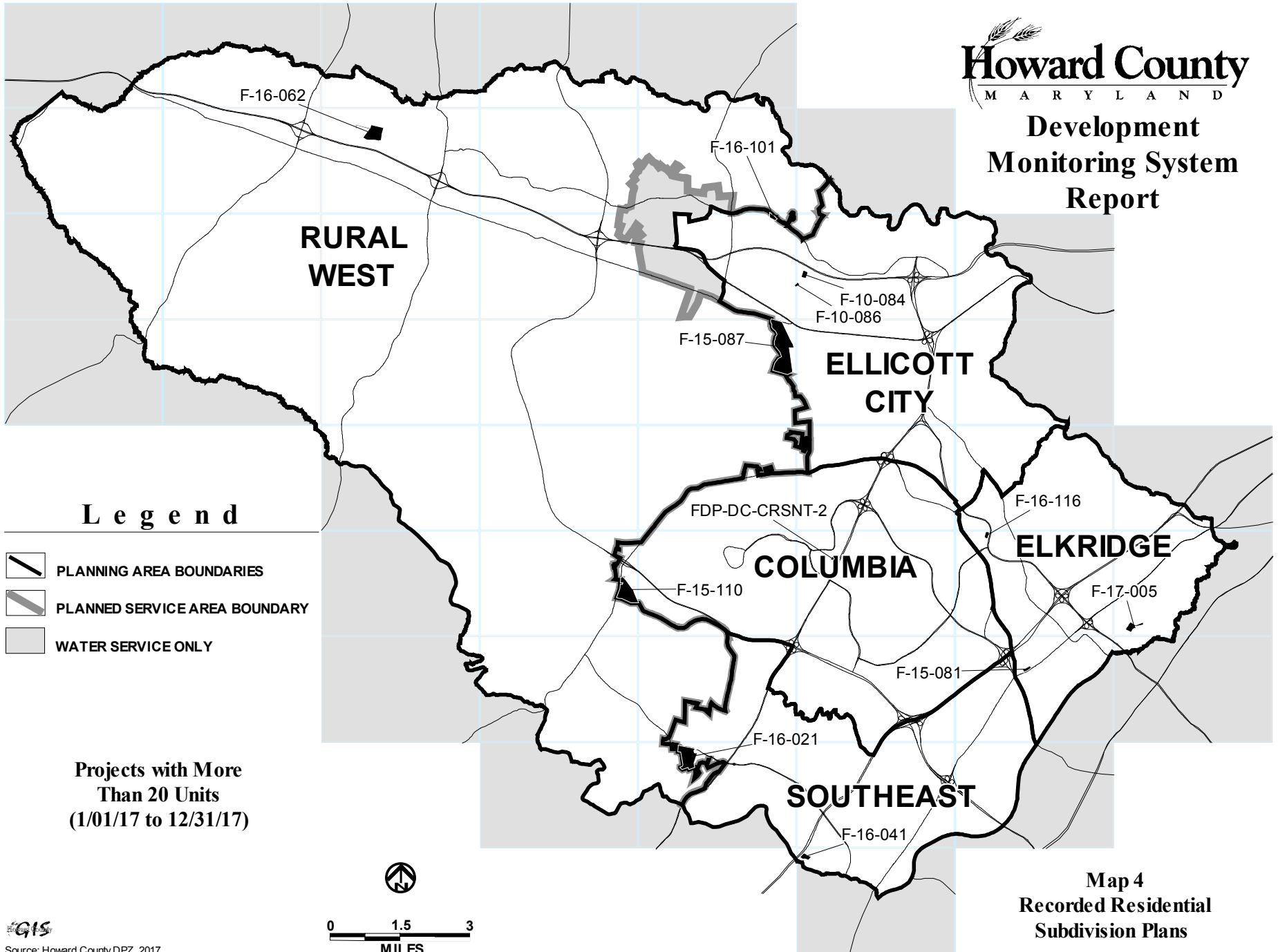


Table 8
Recorded Residential Subdivision Plans, Projects With More Than 20 Units in 2017

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Downtown Columbia	FDP-DC-CRSNT-2	Crescent Arts Center	APT - 101 MIHU	202	202
All Other Columbia	F-15-110	Enclave at Tierney Farm - Ph. 1	SFD	48	48
Elkridge	F-15-081	Howard Square	APT - 78 MIHU	344	537
	F-17-005	Oxford Square - River Overlook	SFA - 19 MIHU	126	
	F-16-116	Shipley's Grant	SFA - 7 MIHU	67	
Ellicott City	F-10-086	Fairways at Turf Valley	SFD, SFA	65	178
	F-15-087	Westmount	SFD	50	
	F-10-084	Fairways at Turf Valley	SFA	33	
	F-16-101	Waverly Grove	SFA	30	
Rural West	F-16-062	Fairlane Farm - Ph. 2	SFD	25	25
Southeast	F-16-021	Maple Lawn South - Ph. 1	SFD	63	92
	F-16-041	Honeysuckle Ridge	SFD, SFA	29	
TOTAL					1,082

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in 2013. Over this time period lots for 5,465 units countywide in 501 subdivision plans totaling 12,140 acres were recorded. This equates to an annual average of 1,093 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 recordings 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 2,097 single family detached units, 38% of the total 5,465. A total of 1,722, 32%, were for single family attached units and the remaining 1,646, 30%, were for apartments units (rental and condo).

Table 9
Recorded Residential Subdivision, 2013 to 2017

Year	Units	Plans	Acreage
2013	921	96	2,558
2014	1,629	122	2,517
2015	908	100	2,570
2016	778	99	2,749
2017	1,229	84	1,746
TOTAL	5,465	501	12,140
ANNUAL AVG.	1,093	100	2,428

Table 10
Unit Potential From Recorded Lots by Unit Type, 2013 to 2017

Year	SFD	SFA	APT	MH	Total
2013	324	235	362	0	921
2014	686	488	455	0	1,629
2015	546	362	0	0	908
2016	184	311	283	0	778
2017	357	326	546	0	1,229
TOTAL	2,097	1,722	1,646	0	5,465
PERCENT	38%	32%	30%	0%	100%
ANNUAL AVG.	419	344	329	0	1,093

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, 2017, are tabulated and compared with those in process the prior year (as of December 31, 2016).

Number of Plans

There were 9 less residential plans in process as of December 31, 2017, than there were one year earlier – 145 plans in 2017 compared to 154 in 2016 (Table 11).

For the current year, Ellicott City had the greatest number of residential plans in process with 48, followed by Elkridge with 34, the Rural West with 31, the Southeast with 16, Columbia with 13, and Downtown Columbia with 3.

Of the 145 plans in process on December 31, 2017, 78 were final plans, 26 were environmental concept plans, 24 were preliminary equivalent sketch plans, 12 were sketch plans and 5 were preliminary plans.

Number of Potential Units

There were 513 less units in process on December 31, 2017, compared to the previous year – 8,732 units compared to 9,245 units (Table 12).

It is important to note that a significant number of the 8,732 units in pro-

Table 11
Number of Residential Subdivision Plans in Process, 12/31/17
 (With comparisons to Countywide total as of 12/31/16)

Planning Area	Environmental		Preliminary Equivalent		Final	TOTAL PLANS
	Concept	Sketch	Sketch	Preliminary		
Downtown Columbia	0	0	1	0	2	3
All Other Columbia	2	1	1	1	8	13
Elkridge	9	3	7	0	15	34
Ellicott City	4	5	6	1	32	48
Rural West	8	0	8	0	15	31
Southeast	3	3	1	3	6	16
TOTAL	26	12	24	5	78	145
As of 12/31/16	30	13	22	2	87	154

cess are part of phased projects with building planned for future 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, 6,962 units are part of phased plans, with building planned as far out as 2027. Phased plans represent 80% of the total units in process.

The larger phased projects include Laurel Park Station and Maple Lawn South in the Southeast; The Overlook at Blue Stream, Oxford Square, and the Park at Locust Thicket in Elkridge; Turf Valley and Westmount in Ellicott City; the Enclave at Tierney Farm and Simpson Oaks in Columbia; and The Crescent and Lakefront properties in Downtown Columbia.

As reflected in Table 12, 15% of the units in process are single family detached units. About 12% are single family attached units and 73% 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, 12/31/17
 (With comparisons to Countywide total as of 12/31/16)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	2,809	0	2,809
All Other Columbia	225	95	0	0	320
Elkridge	113	103	2,005	0	2,221
Ellicott City	497	615	719	0	1,831
Rural West	273	0	0	0	273
Southeast	209	225	844	0	1,278
TOTAL	1,317	1,038	6,377	0	8,732
PERCENT	15%	12%	73%	0%	100%
As of 12/31/16	1,482	1,392	6,371	0	9,245

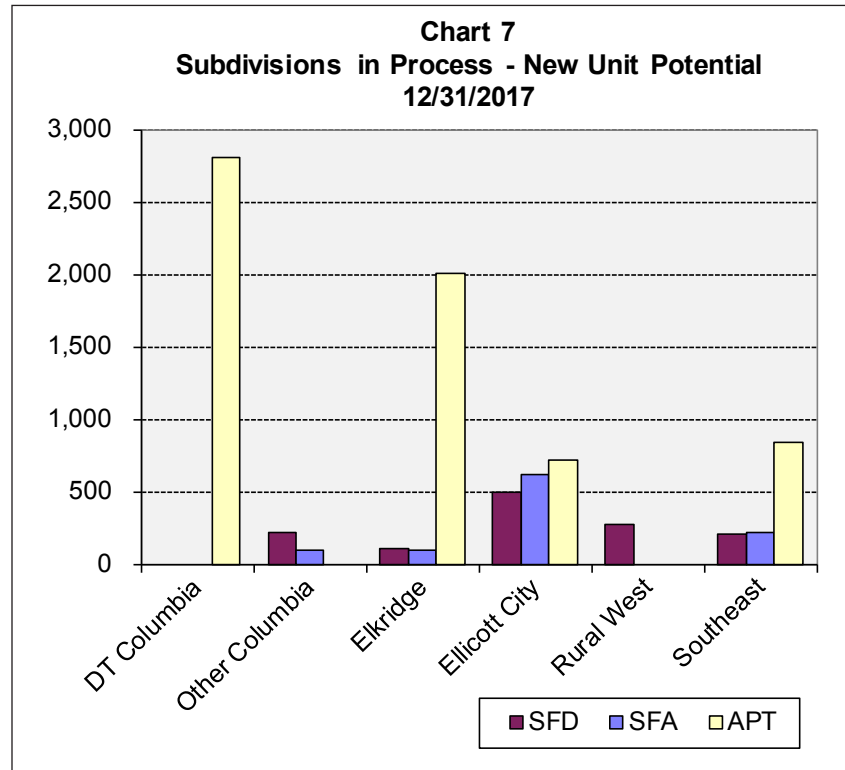


Table 13
Potential Units from Phased Projects in Process, 12/31/17

Planning Area	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	TOTAL
Downtown Columbia	300	550	559	300	300	300	300	200	0	0	2,809
All Other Columbia	0	55	85	90	53	0	0	0	0	0	283
Elkridge	0	462	460	445	158	0	0	0	0	0	1,525
Ellicott City	0	160	160	160	160	160	126	110	110	55	1,201
Southeast	0	280	292	290	250	0	0	0	32	0	1,144
Rural West	0	0	0	0	0	0	0	0	0	0	0
TOTAL	300	1,507	1,556	1,285	921	460	426	310	142	55	6,962

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, 12/31/17

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	882	0	882
All Other Columbia	55	0	0	0	55	0	12	0	0	12
Elkridge	0	0	1,363	0	1,363	30	25	0	0	55
Ellicott City	45	269	448	0	762	173	100	164	0	437
Rural West	0	0	0	0	0	191	0	0	0	191
Southeast	59	156	844	0	1,059	18	17	0	0	35
TOTAL	159	425	2,655	0	3,239	412	154	1,046	0	1,612

Planning Area	Preliminary					Final					TOTAL - 12/31/17				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	1,927	0	1,927	0	0	2,809	0	2,809
All Other Columbia	46	83	0	0	129	124	0	0	0	124	225	95	0	0	320
Elkridge	0	0	0	0	0	83	78	642	0	803	113	103	2,005	0	2,221
Ellicott City	0	6	0	0	6	279	240	107	0	626	497	615	719	0	1,831
Rural West	0	0	0	0	0	82	0	0	0	82	273	0	0	0	273
Southeast	16	52	0	0	68	116	0	0	0	116	209	225	844	0	1,278
TOTAL	62	141	0	0	203	684	318	2,676	0	3,678	1,317	1,038	6,377	0	8,732

Number of Acres

As of December 31, 2017, a total of 2,535 acres of residential land were in the subdivision process. This is 865 less acres compared to the previous year, at which time there were 3,400 acres in process (Table 15).

Major Projects

Table 16 shows a list of potential units from larger projects with 40 units or more. This list includes comprehensive and phased projects. Map 5 shows the location of these projects. The larger projects in this list include the Crescent and Lakefront properties, Simpson Oaks, The Enclave at Tierney Farm, Oxford Square, The Overlook at Blue Stream, The Park at Locust Thicket, Corridor Square, Dorsey Center, Turf Valley, Westmount, Taylor Highlands, Laurel Park Station, and Maple Lawn South. These major projects with 40 or more units total 8,022 units which account for about 92% of the total 8,732 units in the subdivision process.

Table 15
Acreege of Residential Subdivision Plans in Process, 12/31/17
(With comparisons to Countywide total as of 12/31/16)

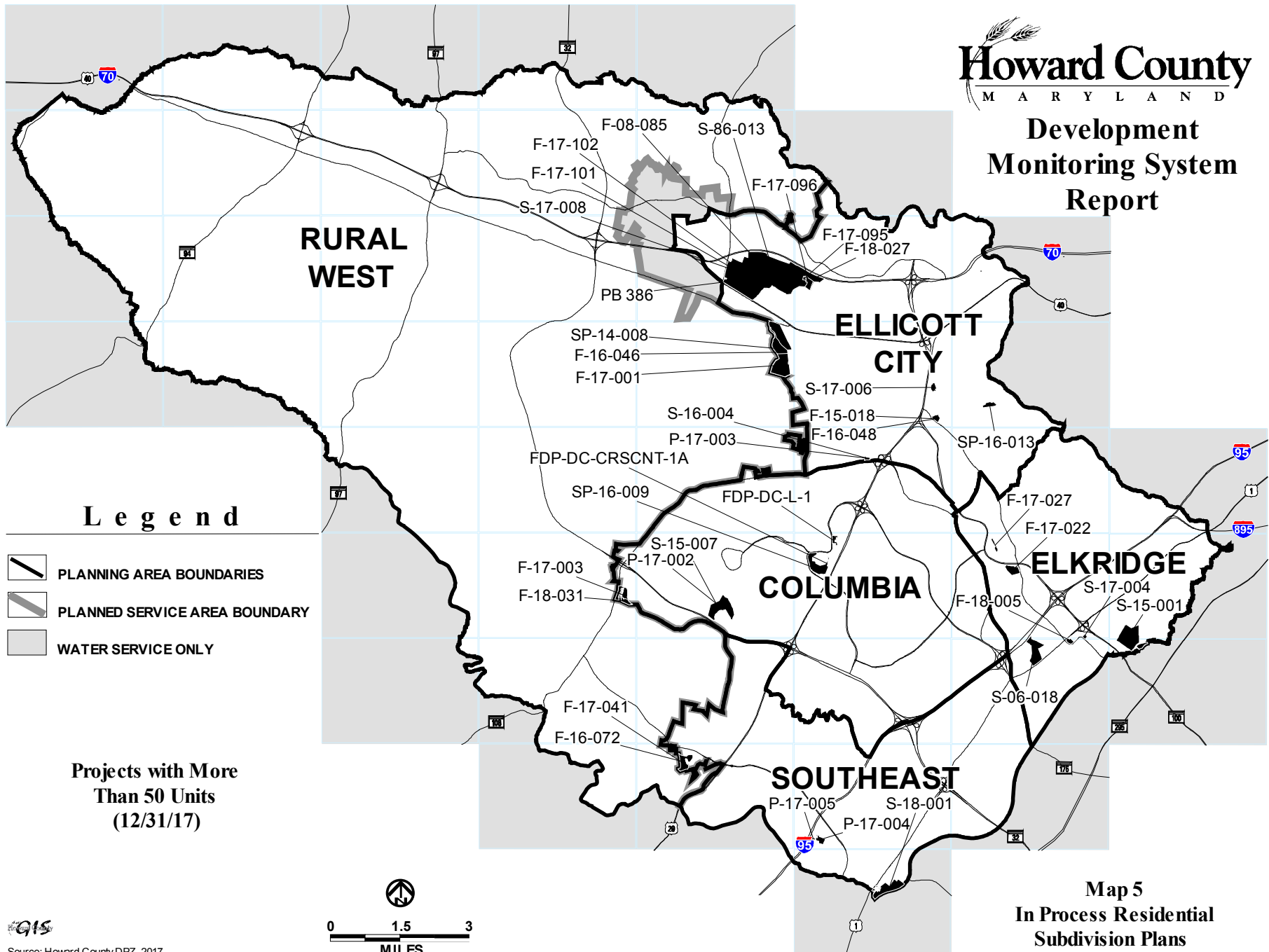
Planning Area	Preliminary Equivalent				TOTAL ADRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	30	0	12	42
All Other Columbia	0	5	98	72	175
Elkridge	134	34	0	102	270
Ellicott City	50	301	5	525	881
Rural West	0	545	0	412	957
Southeast	76	8	20	107	210
TOTAL	260	923	123	1,229	2,535
As of 12/31/16	404	821	40	2,136	3,400

Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/17

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	FDP-DC-CRSCNT-1A, SP-16-009 FDP-DC-L-1	Downtown Columbia - Crescent Downtown Columbia - Lakefront Core	APT - 184 MIHU APT - 41 MIHU	2,300 509	2,809
All Other Columbia	S-15-007, P-17-002 F-18-031, F-17-003	Simpson Oaks Enclave at River Hill (Tierney Farm) - Phases 2 & 3	SFD, SFA SFD	184 100	284
Elkridge	S-06-018 S-15-001 F-17-022 F-18-005 S-17-004 F-17-027	The Overlook at Blue Stream - Remaining Phases Oxford Square - Remaining Phases The Park at Locust Thicket Corridor Square Dorsey Center - Parcel R Trotter's Knoll - Section 1	APT - 98 MIHU APT - 69 MIHU APT - 40 MIHU APT - 38 MIHU APT - 35 MIHU SFA - 8 MIHU	668 465 392 250 230 78	2,083
Ellicott City	S-86-013, PB 386 F-17-001, F-16-046, SP-14-008 SP-16-013 S-17-008 F-18-027 F-17-101, F-17-102 F-15-018, F-16-048 S-16-004, P-17-003 F-17-095, F-17-096 S-17-006 F-08-85	Turf Valley - Remaining Phases Westmount - Remaining Phases Taylor Highlands - Phase 1 The Village at Town Square (in Turf Valley) Ravenwood at Turf Valley (Bluffs) Caperton Village at Turf Valley (Clubhouse) Long Gate Overlook Dorsey Overlook Turf Valley - Pod E Dorsey's Ridge Villages at Turf Valley - Phase 3	SFD, SFA, APT SFD SFA, APT - 26 MIHU SFD, SFA SFA, APT SFA, APT SFA - 7 MIHU SFA SFD, SFA SFA, APT - 6 MIHU SFA	469 266 252 153 114 86 84 81 72 57 40	1,674
Southeast	S-18-001 F-16-072, F-17-041 P-17-004, P-17-005	Laurel Park Station - All Phases Maple Lawn South, Phase 2 Magnolia Manor & Magnolia Manor West	APT, SFA - 150 MIHU SFD SFD, SFA - 6 MIHU	1,000 112 60	1,172
TOTAL					8,022



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Source: Howard County DPZ, 2017.



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

In 2017 there were 1,348 housing units approved in 39 site development plans totaling about 324 acres (Table 17). Elkridge had 857 approved units followed by Ellicott City with 328 units, the Southeast with 104, and Columbia with 59.

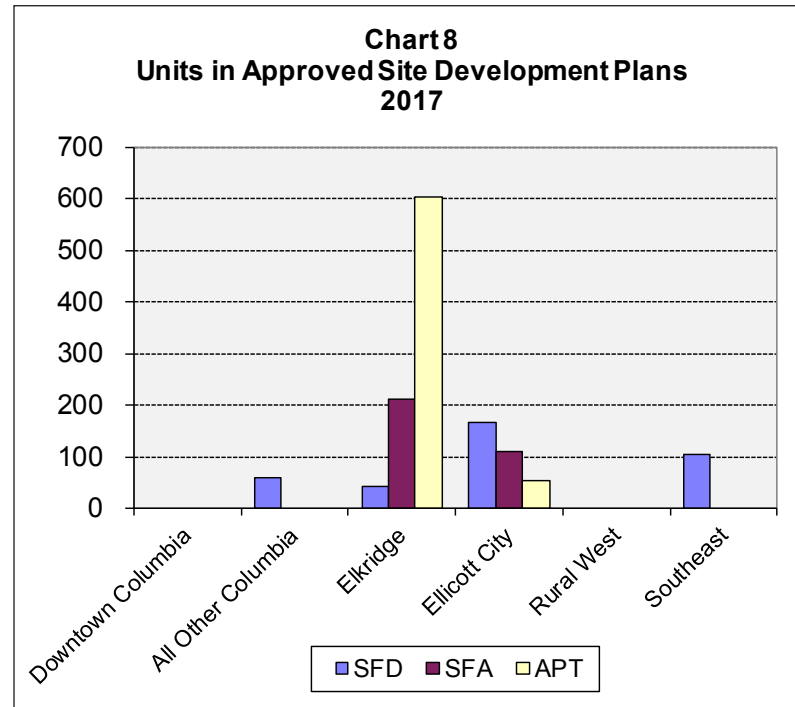
Table 18 shows new units from approved site development plans by unit type. Of the 1,348 approved units, 28% were for single family detached units, 24% were for single family attached units and 49% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 17
Approved Residential Site Development Plans in 2017

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	59	4%	5	13%	28	9%
Elkridge	857	64%	10	26%	50	15%
Ellicott City	328	24%	14	36%	53	16%
Rural West	0	0%	1	3%	168	52%
Southeast	104	8%	9	23%	26	8%
TOTAL	1,348	100%	39	100%	324	100%

Table 18
Approved Units in SDP's by Unit Type in 2017

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	59	0	0	0	59	4%
Elkridge	42	213	602	0	857	64%
Ellicott City	166	109	53	0	328	24%
Rural West	0	0	0	0	0	0%
Southeast	104	0	0	0	104	8%
TOTAL	371	322	655	0	1,348	100%
PERCENT	28%	24%	49%	0%	100%	



Last Year's Projects - Greater than 20 Units

Of the total 1,348 units approved in site development plans last year, 1,234 or about 92% were in part of projects with 20 units or more. These larger projects, shown in Table 19, are located in four planning areas. The location of these plans are shown on Map 6.

Five Year Results

Tables 20 and 21 show the approved residential site development plans from January 1, 2013 to December 31, 2017. Over this five year period 7,935 units were approved countywide in 251 site development plans totaling 1,338 acres.

Table 19
Approved Residential SDP's, Projects With 20 Units or More in 2017

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-17-014	Enclave at River Hill (Tierney)	SFD	48	48
Elkridge	SDP-16-017	Howard Square	APT - 78 MIHU	344	
	SDP-15-053	Oxford Square, Parcel F	APT - 39 MIHU	258	
	SDP-16-052	Oxford Square, River Overlook	SFA - 19 MIHU	126	
	SDP-17-031	Shipley's Grant	SFA - 7 MIHU	67	
	SDP-17-029	Pine Acres	SFD	21	
	SDP-16-079	Shipley's Grant	SFA	20	836
Ellicott City	SDP-17-009	Estates at Patapsco Park	SFD	136	
	SDP-17-058	Fairways at Turf Valley - Phase 3	SFA	64	
	SDP-16-016	Burgess Mill Station - Phase 2	APT - 6 MIHU	53	
	SDP-17-057	Fairways at Turf Valley - Phase 2	SFA	33	286
Southeast	SDP-17-022	Maple Lawn South	SFD	64	64
TOTAL					1,234

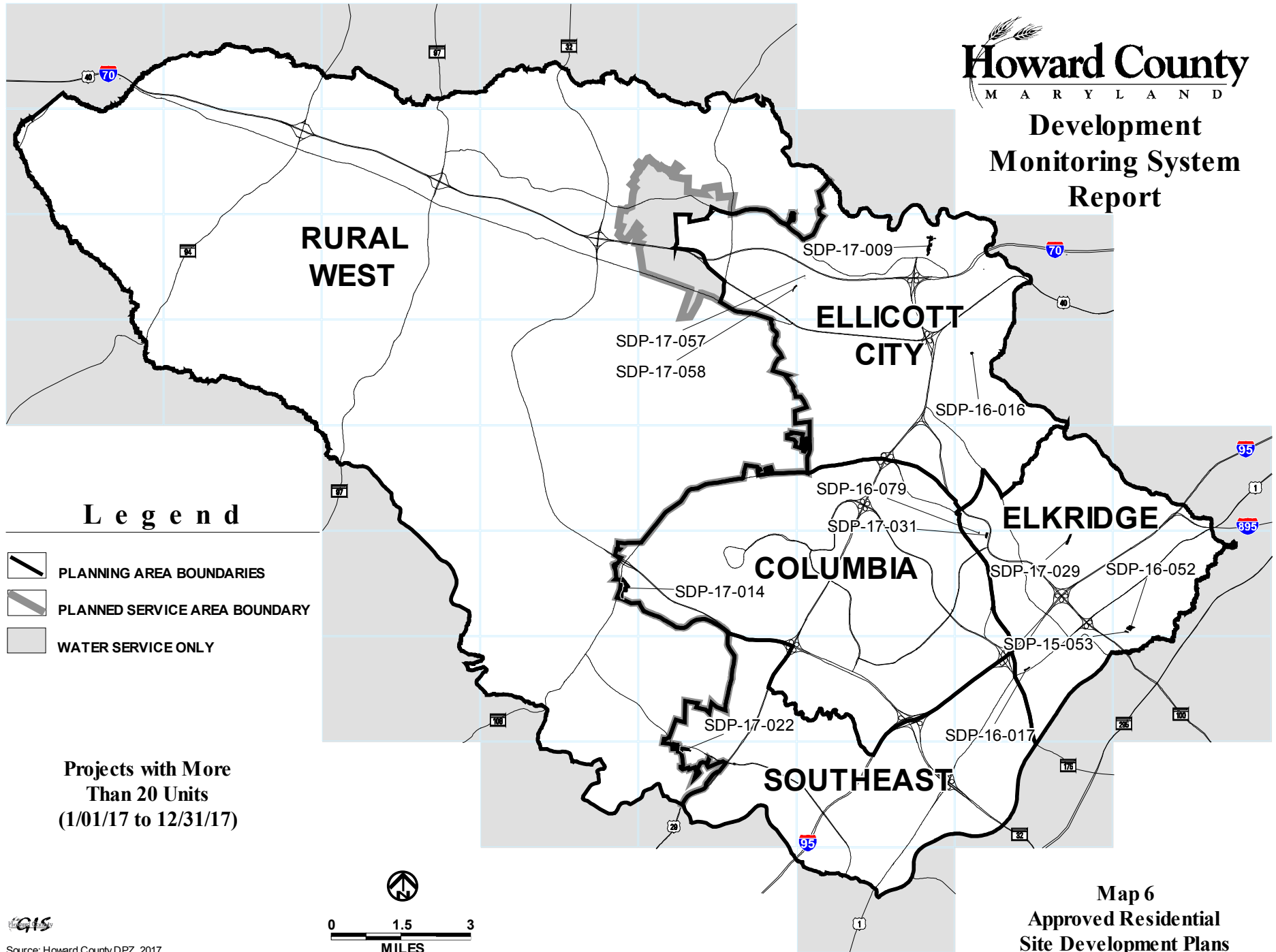
Table 20
Approved Units in Residential Site Development Plans, 2013 to 2017

Year	SFD	SFA	APT	MH	Total
2013	352	322	1,392	0	2,066
2014	432	621	830	0	1,883
2015	402	444	806	0	1,652
2016	255	413	318	0	986
2017	371	322	655	0	1,348
TOTAL	1,812	2,122	4,001	0	7,935
PERCENT	23%	27%	50%	0%	100%
ANNUAL AVG.	362	424	800	0	1,587

Table 21
Approved Residential Site Development Plans, 2013 to 2017

Year	Units	Plans	Acreage
2013	2,066	56	297
2014	1,883	71	278
2015	1,652	46	207
2016	986	39	232
2017	1,348	39	324
TOTAL	7,935	251	1,338
ANNUAL AVG.	1,587	50	268

**Development
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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, 2017, are tabulated and compared to those in process a year earlier (as of December 31, 2016). 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 8 more residential site development plans in process as of December 31, 2017, compared to the prior reporting period, 32 plans compared to 24 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 12/31/17 & 12/31/16

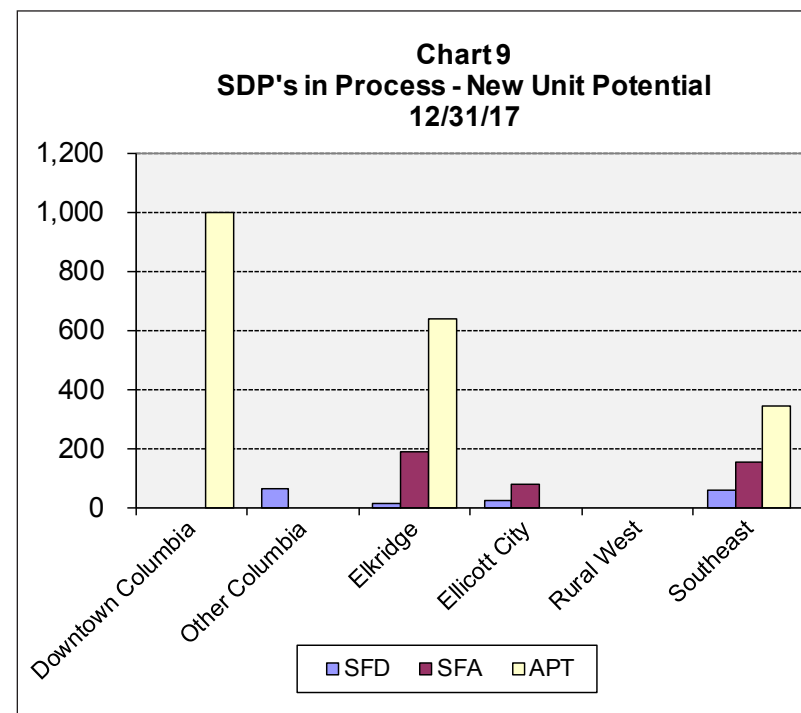
Planning Area	2017	2016
Downtown Columbia	3	0
All Other Columbia	2	1
Elkridge	11	8
Ellicott City	6	7
Rural West	0	1
Southeast	10	7
TOTAL	32	24

Number of Potential Units

There were 894 more units in process as of December 31, 2017, compared to December 31 of the previous year, 2,569 units compared to 1,675 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 1,983 proposed units in 2017. This is followed by 423 proposed single family attached or townhouse units and 163 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, 12/31/17
(With comparisons to Countywide total as of 12/31/16)

Planning Area	Single Family	Single Family	Apartments	Mobile Homes	TOTAL UNITS
	Detached	Attached			
Downtown Columbia	0	0	997	0	997
All Other Columbia	64	0	0	0	64
Elkridge	16	188	642	0	846
Ellicott City	23	79	0	0	102
Rural West	0	0	0	0	0
Southeast	60	156	344	0	560
TOTAL	163	423	1,983	0	2,569
As of 12/31/16	243	434	998	0	1,675



Number of Acres

As of December 31, 2017, a total of 164 acres of residential land were in the site development plan process. This is less than the previous year when there were 301 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects with more than 30 units. Map 7 shows the location of these projects. Of the 2,569 units in the site development plan process, 2,460 or about 96% were in projects with more than 30 units.

These large projects include the three SDPs in the Crescent Neighborhood in Downtown Columbia, the Enclave at River Hill in Columbia, The Park at Locust Thicket, Corridor Square, and Blue Stream in Elkridge; Long Gate Overlook in Ellicott City; and two SDPs in Laurel Park Station in the Southeast.

Table 24
Acreege of Residential SDP's In Process, 12/31/17 & 12/31/16

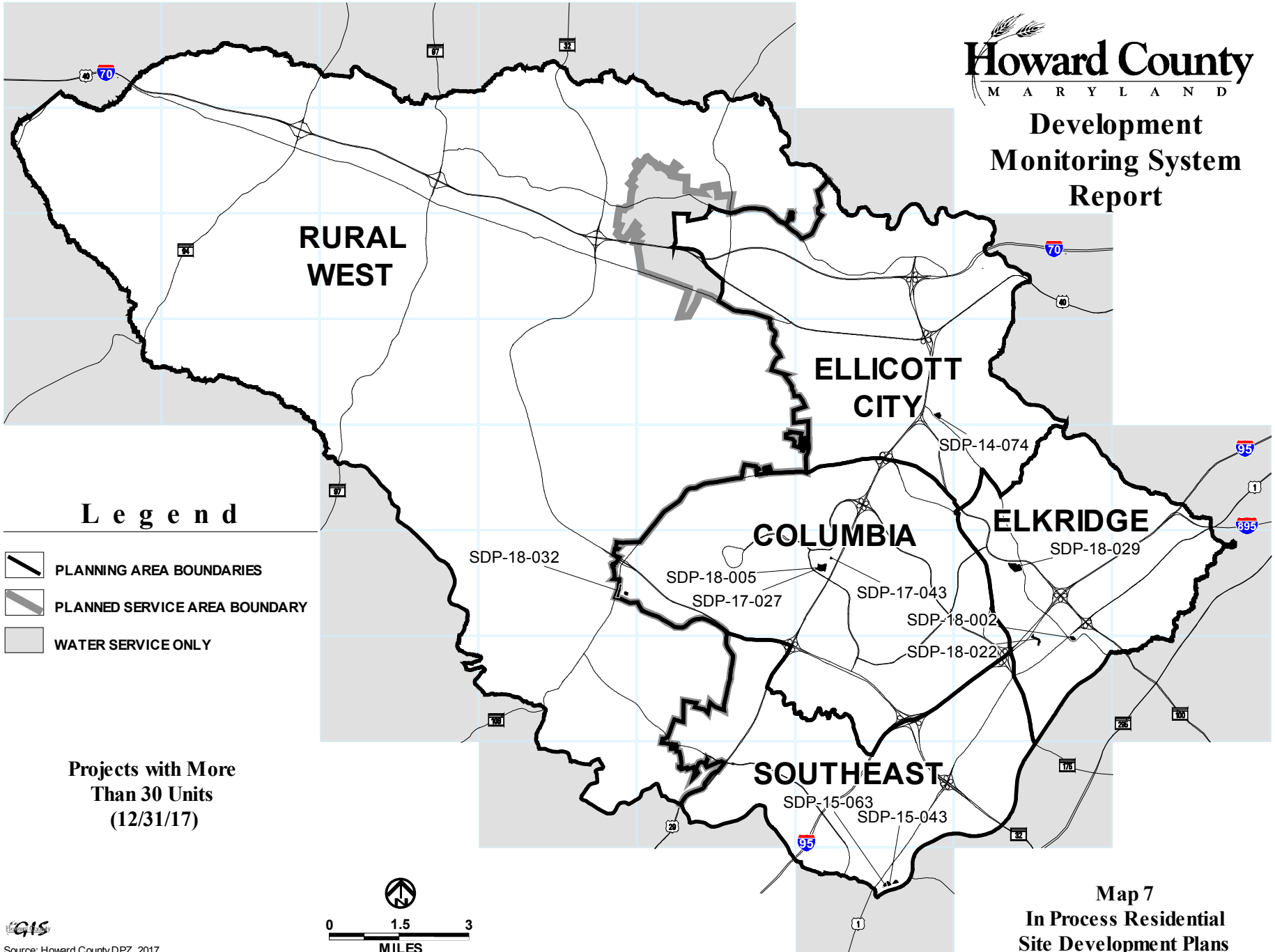
Planning Area	2017	2016
Downtown Columbia	45	0
All Other Columbia	21	1
Elkridge	47	36
Ellicott City	15	57
Rural West	0	168
Southeast	37	39
TOTAL	164	301

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/17

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-18-005	Crescent Neighborhood	APT - 34 MIHU	423	997
	SDP-17-027	Crescent Neighborhood	APT - 31 MIHU	382	
	SDP-17-043	Crescent Arts Center	SFA - 96 MIHU	192	
Columbia	SDP-18-032	Enclave at River Hill (Tierney)	SFD	62	62
Elkridge	SDP-18-029	The Park at Locust Thicket	APT - 40 MIHU	392	822
	SDP-18-002	Corridor Square	APT - 38 MIHU	250	
	SDP-18-022	Blue Stream Towns - Section 2	SFA - 34 MIHU	180	
Ellicott City	SDP-14-074	Long Gate Overlook	SFA - 8 MIHU	79	79
Southeast	SDP-15-063	Laurel Park Station	APT - 42 MIHU	280	500
	SDP-15-043	Laurel Park Station	SFA, APT - 33 MIHU	220	
TOTAL					2,460



Development Monitoring System Report



Legend

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

Projects with More Than 30 Units (12/31/17)



Source: Howard County DPZ, 2017.

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, 2017, to December 31, 2017, the County issued 1,185 residential building permits for new construction (Table 26). Elkridge had the greatest number issued with 459, followed by the Southeast with 292 and then Ellicott City with 246. Countywide, 41% of the permits were for single family detached units. About 34% were for apartment units (both rental and condo) and 25% for single family attached units. Chart 10 shows these results graphically by planning area.

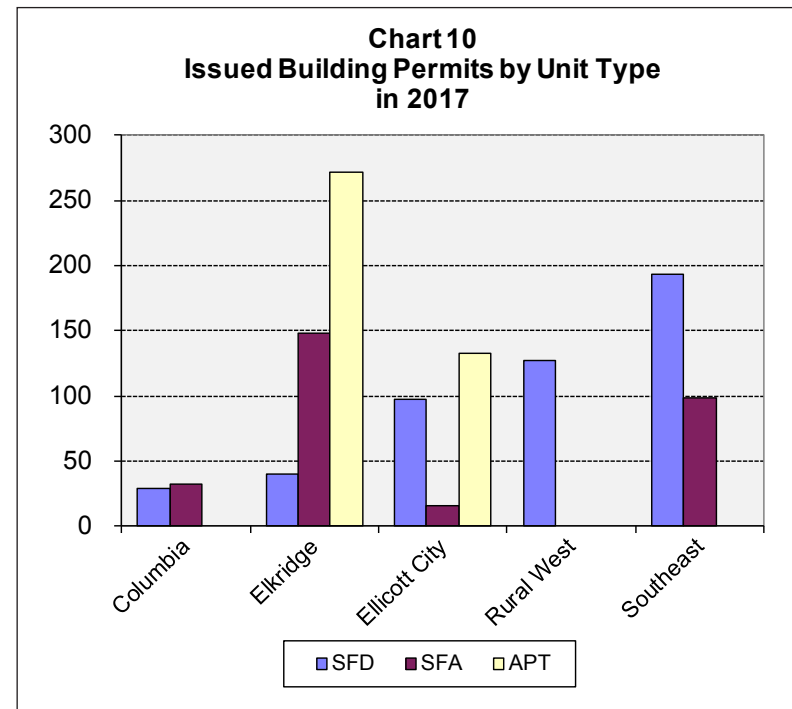


Table 26
Issued Residential Building Permits by Unit Type in 2017

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	29	32	0	0	61	5%
Elkridge	40	148	271	0	459	39%
Ellicott City	97	16	133	0	246	21%
Rural West	127	0	0	0	127	11%
Southeast	193	99	0	0	292	25%
TOTAL	486	295	404	0	1,185	100%
PERCENT	41%	25%	34%	0%	100%	

Last Year's Projects - 25 or More Units

Table 27 summarizes the issued residential building permits in larger developments with 25 or more units. About 74%, or 872 of the total 1,185 permits issued last year, fall into this category. Map 8 shows the locations of each of the developments.

Five Year Results

Over five years, from 2013 to 2017, a total of 9,050 residential permits have been issued in Howard County (Table 28). This is an average of 1,810 permits per year. Last year's 1,185 issued permits was 52% less than the 2,475 permits issued the year before and the lowest since 2014.

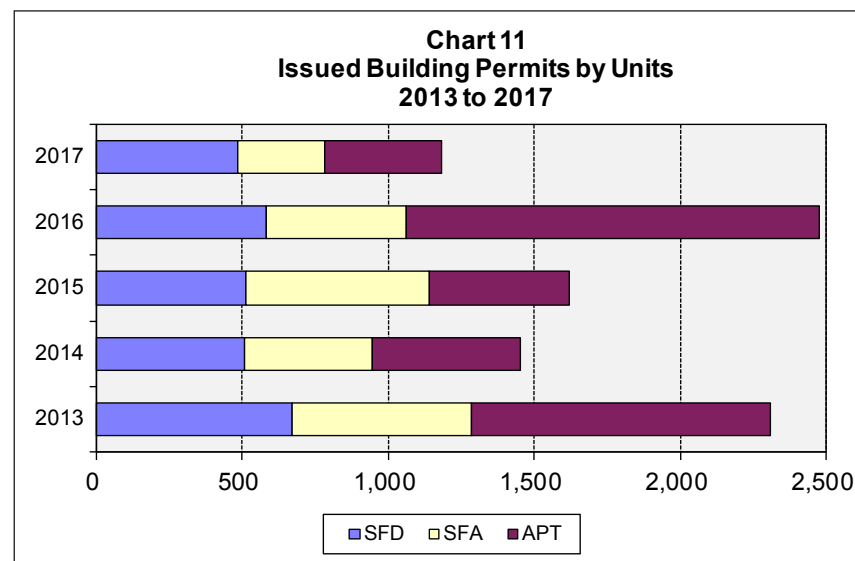
Of the 9,050 total permits issued over the 5 year time period, 2,763, or 31%, were for single family detached units. There were 2,450 permits (27%) for single family attached units and 3,829 permits (42%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

Table 27
Issued Residential Building Permits, Subdivisions With 25 or More Units in 2017

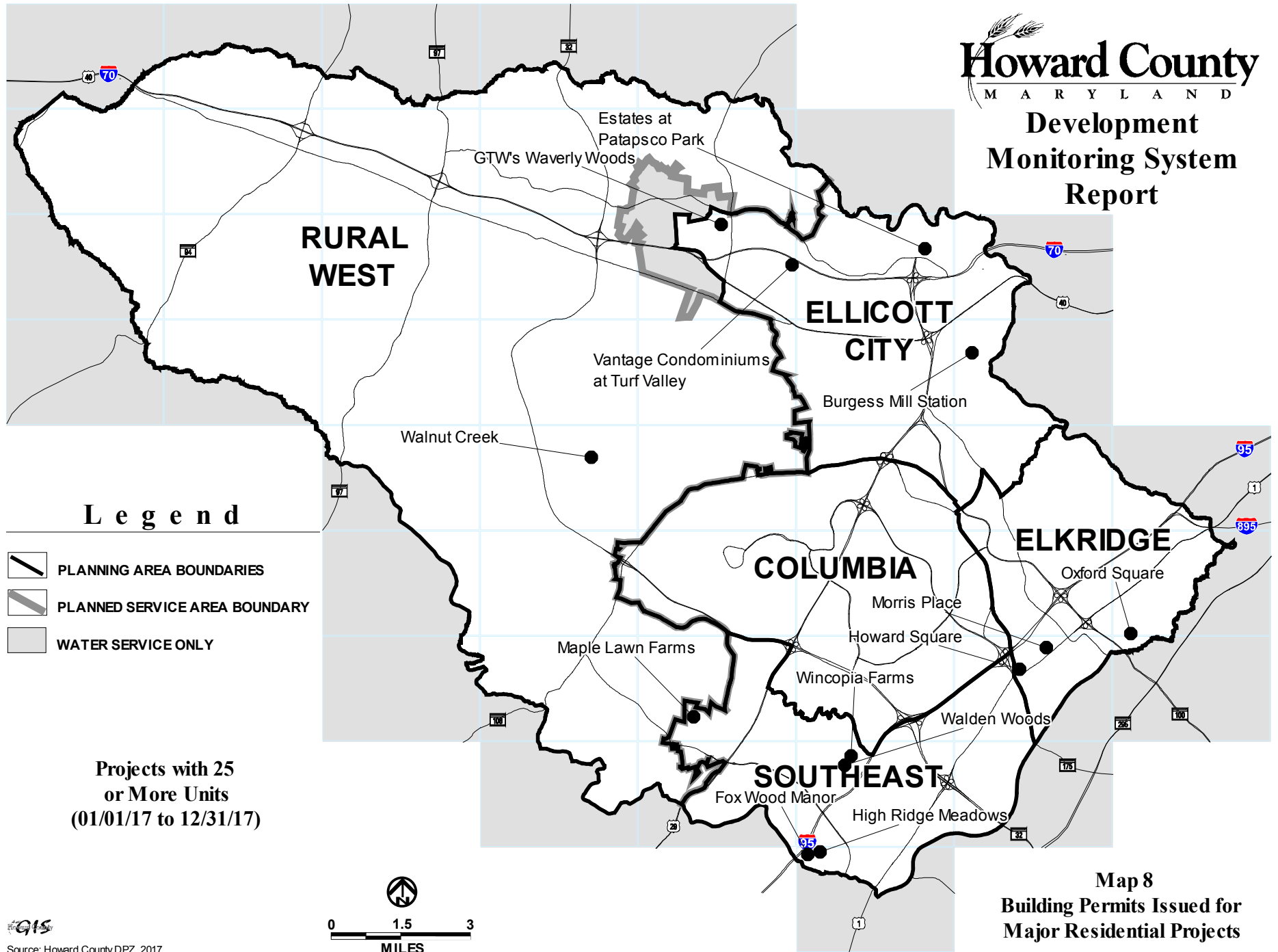
Planning Area	Subdivision	Unit Type	Units	TOTAL
Elkridge	Howard Square	Townhomes/Apartments	274	396
	Morris Place	Townhomes	71	
	Oxford Square	Townhomes	51	
Ellicott City	Estates at Patapsco Park	Single-Family Detached	64	191
	Burgess Mill Station	Apartments	53	
	GTW's Waverly Woods	Townhomes/Apartments-Age Restricted	44	
	Vantage Condominiums at Turf Valley	Apartments	30	
Rural West	Walnut Creek	Single-Family Detached	42	42
Southeast	High Ridge Meadows	Single-Family Detached/Townhomes	79	243
	Wincopia Farms	Single-Family Detached/Townhomes	49	
	Maple Lawn Farms	Single-Family Detached	48	
	Fox Wood Manor	Single-Family Detached/Townhomes	35	
	Walden Woods	Single-Family Detached/Townhomes-Age Restricted	32	
TOTAL				872

Table 28
Issued Residential Building Permits by Unit Type, 2013 to 2107




Year	SFD	SFA	APT	MH	Total
2013	671	614	1,024	8	2,317
2014	509	435	509	0	1,453
2015	514	628	478	0	1,620
2016	583	478	1,414	0	2,475
2017	486	295	404	0	1,185
TOTAL	2,763	2,450	3,829	8	9,050
PERCENT	31%	27%	42%	0.1%	100%
ANNUAL AVG.	553	490	766	2	1,810



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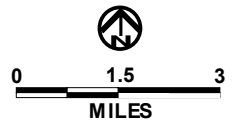
Legend

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

**Projects with 25
 or More Units
 (01/01/17 to 12/31/17)**

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


 Source: Howard County DPZ, 2017.



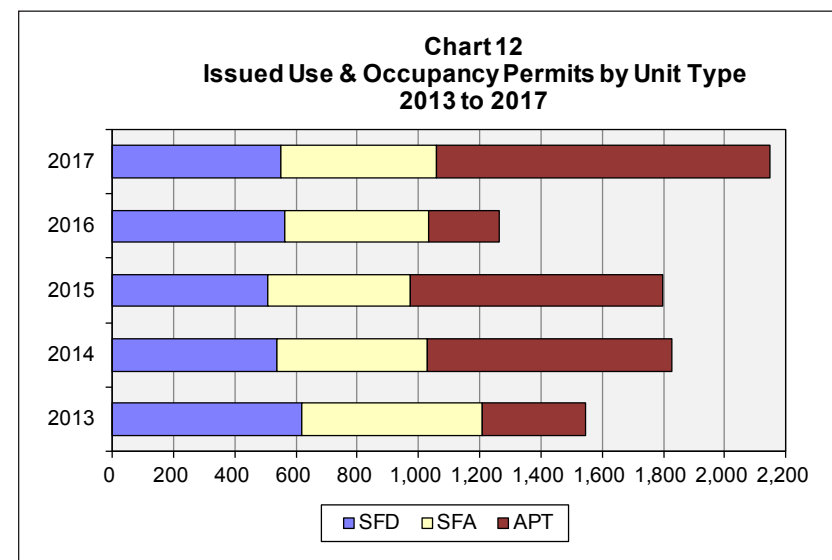
Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2017, to December 31, 2017, the County issued 2,147 use and occupancy permits (Table 29). Of all planning areas, the Southeast had the most with 779. This is followed by Elkridge with 485, Ellicott City with 330, Columbia with 276, Downtown Columbia with 160, and the Rural West with 117. Countywide, 26% of the permits were for single family detached units, 24% were for single family attached units and 51% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type in 2017

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	160	0	160	7%
All Other Columbia	20	26	230	0	276	13%
Elkridge	36	281	168	0	485	23%
Ellicott City	146	106	78	0	330	15%
Rural West	117	0	0	0	117	5%
Southeast	231	97	451	0	779	36%
TOTAL	550	510	1,087	0	2,147	93%
PERCENT	26%	24%	51%	0%	100%	



Five Year Results

From 2013 to 2017, a total of 8,582 use and occupancy permits were issued in Howard County (Table 30). This is an annual average of 1,716 permits per year.

Of the 8,582 total use and occupancy permits issued over the five year timeframe, 32% were for single family detached units, 29% for single family attached units, and 38% for apartment units. There were 70% more units built last year compared to the year before, 2,147 completions in 2017 compared to 1,263 in 2016. Chart 12 shows the results by unit type graphically over time.

Table 30
Issued Use and Occupancy Permits by Unit Type, 2013 to 2017

Year	SFD	SFA	APT	MH	Total
2013	618	591	336	0	1,545
2014	536	491	802	0	1,829
2015	506	469	823	0	1,798
2016	564	467	232	0	1,263
2017	550	510	1,087	0	2,147
TOTAL	2,774	2,528	3,280	0	8,582
PERCENT	32%	29%	38%	0%	100%
ANNUAL AVG.	555	506	656	0	1,716

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, 2017, to December 31, 2017, 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, 2017. This includes both subdivision and site development plans. During this latest time period there were no age-restricted units in process. This is the first time there are no plans in Howard County with age-restricted units under review since the adoption of the 2000 General Plan 18 years ago. Last year in 2016 there were only 12 age-restricted apartment units in process.

Table 31
Age Restricted Units from Plans in Process, 12/31/2017
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	0%
As of 12/31/16	0	12	0	12	

Table 32 shows the total MIHU units in process. These total 843, the greatest number of which are in Elkridge. This is slightly less than the number in process the previous year when there were 891 in process.

Table 32
MIHU Units from Plans in Process, 12/31/2017
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia *	0	0	315	315	37%
All Other Columbia	0	0	0	0	0%
Elkridge	0	44	280	324	38%
Ellicott City	0	21	27	48	6%
Rural West	0	0	0	0	0%
Southeast	0	104	52	156	19%
TOTAL	0	169	674	843	63%
PERCENT	0%	20%	80%	100%	
As of 12/31/16	2	63	826	891	

* Includes very low and middle income units and MIHU units in accordance to the DT Columbia Plan.

Table 33 shows just the age-restricted MIHU units in process. For this year, none of the 843 MIHU units are age-restricted. There were also no 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, 12/31/2017
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	
As of 12/31/17	0	0	0	0	

Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2016, and December 31, 2016. There were a total of 12 units approved. This is less than the 22 units approved during the previous reporting period. All 12 units are single family attached units in a single project. Map 9 shows the location of this one approved age-restricted project 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 149 units were approved, all but 6 of them in Elkridge. None of these units are 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 in 2017
(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	12	0	12	100%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	12	0	12	100%
PERCENT	0%	100%	0%	100%	
Year 2016	0	22	0	22	

Table 35
MIHU Units from Approved Plans in 2017
(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	26	117	143	96%
Ellicott City	0	0	6	6	4%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	26	123	149	100%
PERCENT	0%	17%	83%	100%	
Year 2016	0	63	43	106	

Table 36
Age-Res. MIHU Units from Approved Plans in 2017
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	
Year 2016	0	0	0	0	

Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2017

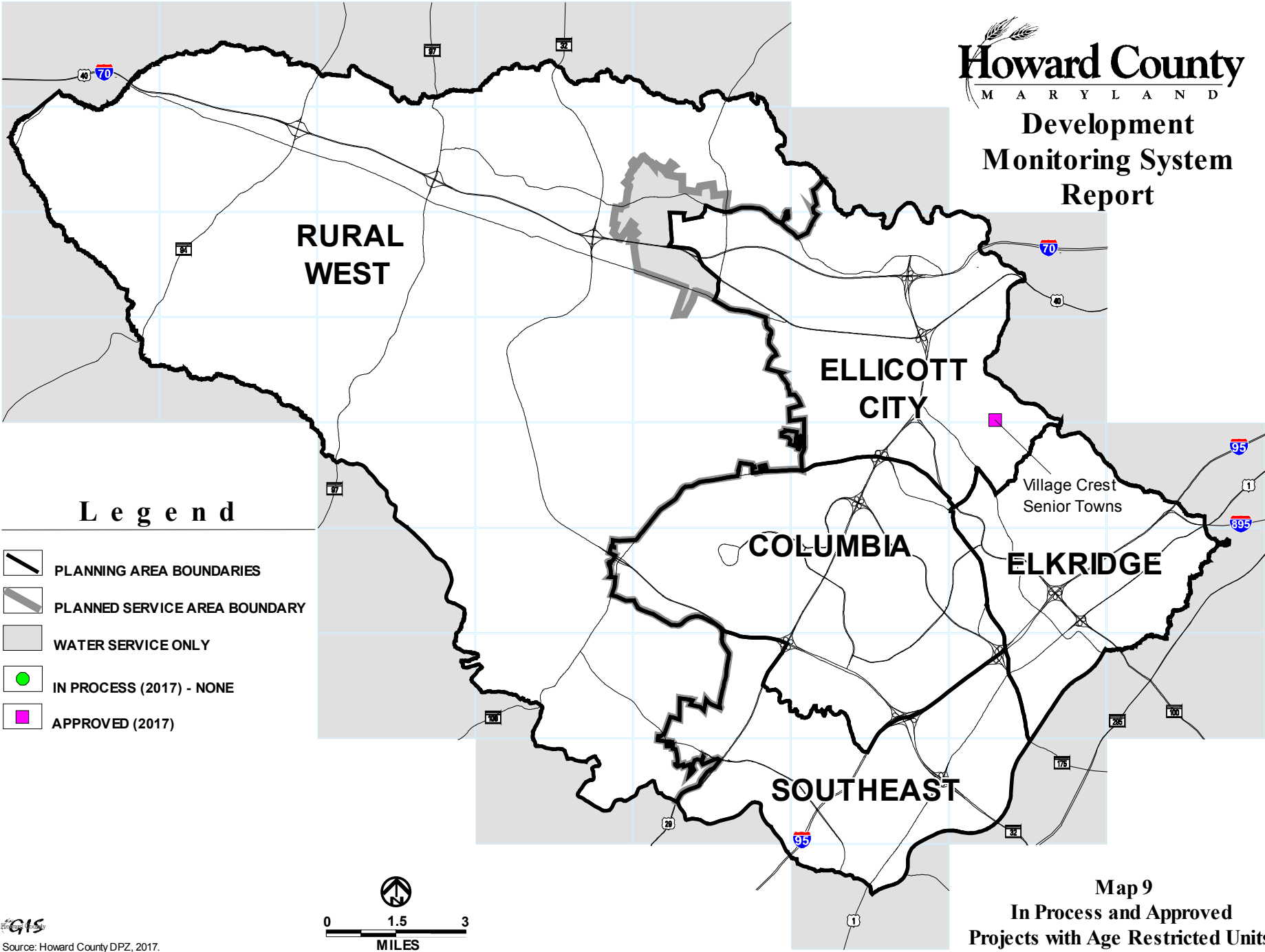
Plan Name	File Number	Zoning	MIHU Units												Market Rate Age Restricted Units			
			Not Age Restricted				Age Restricted				Total MIHU				Age Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
The Crescent - DT Columbia - Remaining Units	FDP-DC-CRSNT-1A	NT	0	0	113	113	0	0	0	0	0	0	113	113	0	0	0	0
The Overlook at Blue Stream - Remaining Units	S-06-018	CAC	0	0	98	98	0	0	0	0	0	0	98	98	0	0	0	0
Arts Center - DT Columbia	SDP-17-043	NT	0	0	96	96	0	0	0	0	0	0	96	96	0	0	0	0
Laurel Park Station - Remaining Units	S-18-001	TOD	0	0	75	75	0	0	0	0	0	0	75	75	0	0	0	0
Oxford Square - Remaining Units	S-15-001	TOD	0	0	69	69	0	0	0	0	0	0	69	69	0	0	0	0
Laurel Park Station	SDP-15-063	TOD	0	0	42	42	0	0	0	0	0	0	42	42	0	0	0	0
Lakefront Core - DT Columbia	FDP-DC-L-1	NT	0	0	41	41	0	0	0	0	0	0	41	41	0	0	0	0
The Park at Locust Thicket	SDP-18-029	R-A-15, POR	0	0	40	40	0	0	0	0	0	0	40	40	0	0	0	0
Corridor Square Parcel C	SDP-18-002	TOD	0	0	38	38	0	0	0	0	0	0	38	38	0	0	0	0
Dorsey Center - Parcel R	S-17-004	TOD R	0	0	35	35	0	0	0	0	0	0	35	35	0	0	0	0
The Crescent - DT Columbia	SDP-18-005	NT	0	0	34	34	0	0	0	0	0	0	34	34	0	0	0	0
Blue Stream Towns - Section 3	SDP-18-022	CAC	0	34	0	34	0	0	0	0	0	34	0	34	0	0	0	0
Laurel Park Station	SDP-15-043	TOD	0	23	10	33	0	0	0	0	0	23	10	33	0	0	0	0
The Crescent - DT Columbia	SDP-17-027	NT	0	0	31	31	0	0	0	0	0	0	31	31	0	0	0	0
Taylor Highlands Phase 1	SP-16-013	R-A-15	0	0	26	26	0	0	0	0	0	0	26	26	0	0	0	0
Trotter's Knoll, Section 1	F-17-027	R-SA-8	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Long Gate Overlook	SDP-14-074	R-A-15	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Dorsey's Ridge	S-17-006	CEF	0	5	1	6	0	0	0	0	0	5	1	6	0	0	0	0
Magnolia Manor	P-17-004	R-SC	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0
Tiber Woods	F-18-001	R-SC	0	4	0	4	0	0	0	0	0	4	0	4	0	0	0	0
St. Charles Woods	SP-15-010	R-ED	0	3	0	3	0	0	0	0	0	3	0	3	0	0	0	0
Trotter's Knoll, Section 2	SP-17-005	R-SA-8	0	2	0	2	0	0	0	0	0	2	0	2	0	0	0	0
The Towns at Court Hill	S-17-007	R-A-15	0	1	0	1	0	0	0	0	0	1	0	1	0	0	0	0
TOTAL			0	94	749	843	0	0	0	0	0	94	749	843	0	0	0	0

Table 38
Approved SDP's with MIHU and Age Restricted Units in 2017

Plan Name	File Number	Zoning	MIHU Units												Market Rate Age Restricted Units			
			Not Age Restricted				Age Restricted				Total MIHU				Age Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Howard Square	SDP-16-017	CAC	0	0	78	78	0	0	0	0	0	0	78	78	0	0	0	0
Shipley's Grant	SDP-17-031	R-A-15	0	7	0	7	0	0	0	0	0	7	0	7	0	0	0	0
Oxford Square Parcel F-F	SDP-15-053	TOD	0	0	39	39	0	0	0	0	0	0	39	39	0	0	0	0
Oxford Square River Overlook	SDP-16-052	TOD	0	19	0	19	0	0	0	0	0	19	0	19	0	0	0	0
Burgess Mill Station Phase 2	SDP-16-016	R-A-15	0	0	6	6	0	0	0	0	0	0	6	6	0	0	0	0
Village Crest Senior Towns	SDP-17-007	POR	0	0	0	0	0	0	0	0	0	0	0	0	0	12	12	
TOTAL			0	26	123	149	0	0	0	0	0	26	123	149	0	0	12	12



Development Monitoring System Report



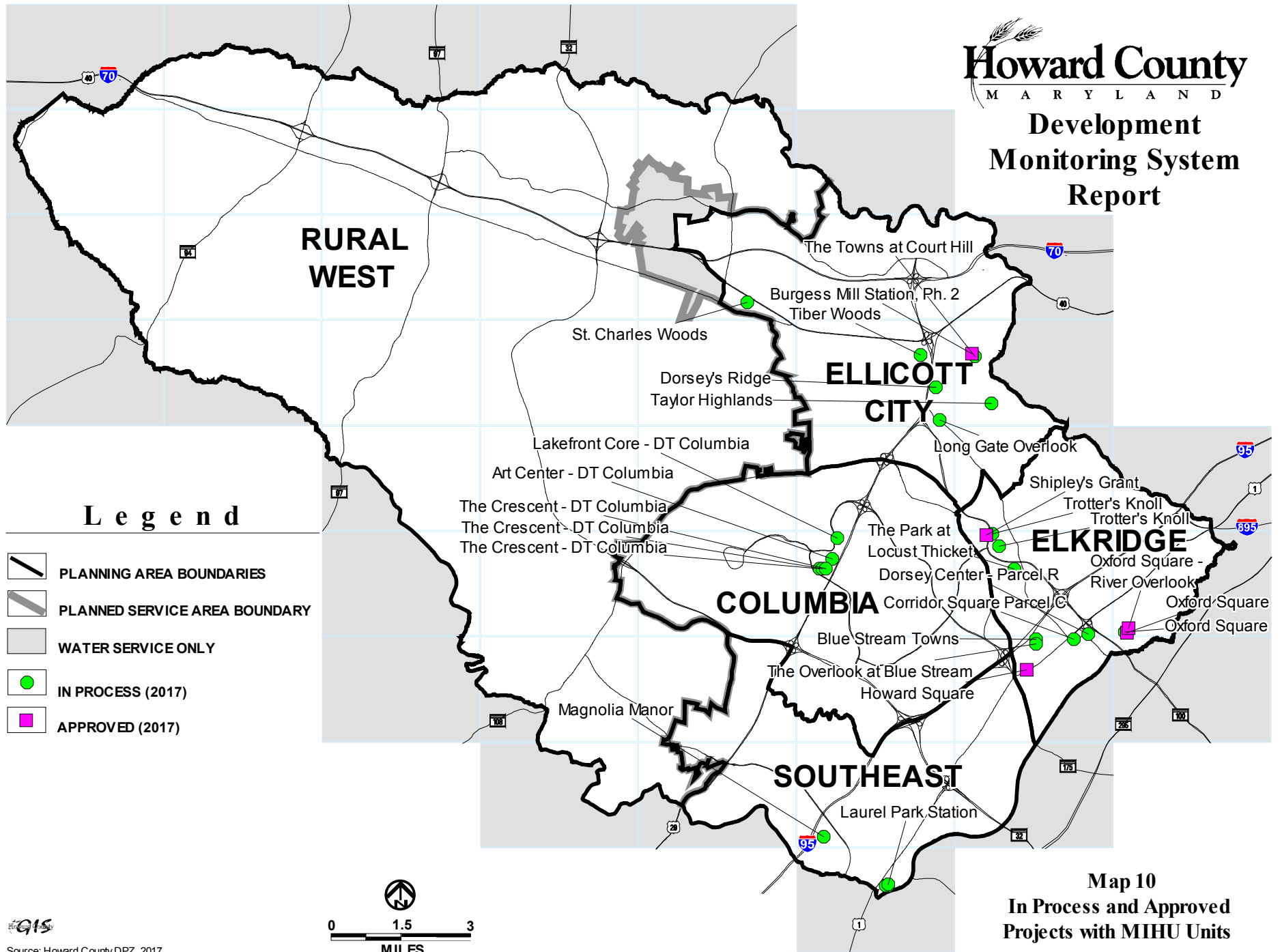
Legend

- PLANNING AREA BOUNDARIES
PLANNED SERVICE AREA BOUNDARY
WATER SERVICE ONLY
IN PROCESS (2017) - NONE
APPROVED (2017)

Source: Howard County DPZ, 2017.

Map 9 In Process and Approved Projects with Age Restricted Units

Howard County
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Source: Howard County DPZ, 2017.



Use & Occupancy Permits

Table 39 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2017, and December 31, 2017, 124 age-restricted units were built, 6% of the total 2,147 housing units built in the County over this latest reporting period.

There were 210 less age-restricted units built in the current reporting period compared to the previous period when there were 334 units built. The 2017 annual amount of 124 units built is the smallest number built since 2004, the time when legislation was adopted enabling increased opportunities to build age-restricted units.

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, 18% of all new homes built in Howard County have been age-restricted. This is summarized in Table 40.

Table 39
Age Restricted Units Built in 2017
(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	21	0	21	17%
Elkridge	0	0	0	0	0%
Ellicott City	26	1	48	75	60%
Rural West	0	0	0	0	0%
Southeast	3	25	0	28	23%
TOTAL	29	47	48	124	100%
PERCENT	23%	38%	39%	100%	

Year 2016	SFD	SFA	APT	TOTAL
	89	64	181	334

Table 40
Age Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/17

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%
01/14 to 12/14	41	56	113	210	1,829	11%
01/15 to 12/15	48	72	48	168	1,798	9%
01/16 to 12/16	89	64	181	334	1,263	26%
01/17 to 12/17	29	47	48	124	2,147	6%
TOTAL	358	1,267	2,010	3,635	20,339	18%
PERCENT	10%	35%	55%	100%		

* Extra quarter included due to change in analysis timeframe.

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 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.

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 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 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. 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 scoring farms in 2009 and 2010. At the conclusion of Batch 14, 14,631 acres had been preserved through the County purchase program.

Several changes were made to the ALPP prior to the most recent application cycle, which began in March 2013. The law was amended to eliminate the batching process, and applications are now accepted on a rolling basis. Other changes include reducing the minimum acreage requirement and adding points to the scoring system for properties containing green infrastructure. For this current application cycle, over 50 property owners have requested scoring for their farms. From 2013 through 2016, there have been 11 settlements totaling 657 acres added to the ALPP. In addition, an easement on a 71 acre property was acquired by MALPF in 2015, the first time in many years a new MALPF easement had been acquired.

In 2017, the current DMS reporting period, six applicant properties went to settlement, adding 438 acres to the ALPP.

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 2017, no properties were preserved with an agricultural easement through the development process.

As of December 31, 2017, there were 22,800 acres of permanently preserved agricultural land. This includes 15,720 acres of purchased easements through the County's program, 4,098 acres of easements purchased by the MALPF (including 81 acres in the Rural Legacy program), and 2,982 preservation acres dedicated as part of the land development process (Table 41)

Table 41
Agricultural Preservation Easements, December 31, 2017

Type	Acres	Percent
County Purchased Agric. Easements (1)	15,720	69%
State Purchased Agric. Easements	4,098	18%
Dedicated Agric. Preservation Parcels	2,982	13%
TOTAL	22,800	100%

(1) Note that 37 of these acres are in the east (R-ED zoning) given a preservation parcel crosses over the Priority Service Area line. This was enabled through CB 54-2014.

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 2017 is 2,982.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 197 acres of land in 15 parcels were dedicated as Howard County/Homeowner’s Association preservation parcels. Table 42 shows the land preservation totals from dedicated easements through then end of 2017 for all easement types.

Since 1992, preservation easements on 11,881 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 6,918 acres, are jointly held by Howard County and various homeowner’s associations. As indicated earlier, 2,982 acres are held by the Howard County Agricultural Land Preservation Program. A total of 1,067 acres are jointly held by the Howard County Conservancy and Howard County and 391 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 42 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 16,461 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,580 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 11,881 acres, is land in dedicated preservation easements. Of the 4,580 acres subdivided for

residential development, about 443 acres are not yet developed (built on), 3,685 acres are developed (built on) and 452 acres are for roads.

Table 42
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	256	314	
Undeveloped Lots (From Density Transfer)	117	129	
Total Undeveloped Lots	373	443	
Developed Lots (By Right)	2,259	2,501	
Developed Lots (From Density Transfer)	1,122	1,184	
Total Developed Lots	3,381	3,685	
Roadway		452	
TOTAL	3,754	4,580	27.8%

Preservation	Parcels	Acres	
Agricultural Preservation	88	2,982	
Howard County/Homeowner's Association	637	6,918	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County/Howard County Conservancy	31	1,067	
Howard County/Patuxent Conservation Corps. Inc.	16	391	
Other	88	393	
Total Preservation	865	11,881	72.2%

GRAND TOTAL (Includes Res. Develop.)	4,619	16,461	100.0%
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Total Preserved Land in the Rural West

Preservation easements in the Rural West discussed above total 31,662 acres. This includes 22,763 acres of agricultural preservation easements and 8,899 acres of environmental preservation parcels dedicated through the subdivision process. This represents about 33% of the approximate 94,660 total acres of land in the Rural West.

Including County and State parks (8,087 acres), WSSC land (2,438 acres), permanent historic easements (103 acres) and other environmental easements (1,160 acres) the total preserved land amounts to 43,450 acres, about 46% of all land in the Rural West.

Map 11 shows the preserved land as of December 31, 2017, 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 to allow additional density above what the by right zoning there allows. For each transaction, sending and receiving parcels must be within the same planning area or within a two-mile radius regardless of the planning area. Additionally, sending parcels that contain a historic structure may exchange density with a receiving parcel in any planning area. Properties must be zoned R-ED, R-20, R-12 or R-SC.

For the current reporting period covering calendar year 2017 there was one receiving subdivision utilizing this option acquiring one additional development right. This subdivisions received the transferred density from an already existing sending parcel that had additional density available to send. Table 43 shows the aggregate results since the beginning of this program. A total of 13 neighborhood preservation parcels have been created totaling 73.1 acres. The easement holder for 12 of these acres is Howard County. The Taylor Property Community Association is the holder of the one other easement. Through this process, additional density was created for 18 additional single family detached homes, 6 additional townhomes and 25 additional apartment units on a total of 4.9 acres. These additional units are part of receiving subdivisions that total 919 housing units on 335 acres. Thus far through the end of 2017, 493 of these 919 units are built. It should be noted that 188 of the 335 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 acres in permanent historic easements, 316 acres in Maryland Environmental Trust easements, 112 acres in other land trust conservation easements, and 37 acres in a county purchased agricultural preservation easement. Total preservation easements in the east therefore amount to 693 acres. This is summarized in Table 44.

Total Preserved Land in the East

Including County and State parks (10,546 acres), WSSC land (680 acres), non-County Open space such as HOA land (2,950) and Columbia Association open space (3,637 acres) the total preserved land amounts to 18,506 acres, about 28% of all land in the east. Map 11 shows the locations of the preserved land by the various types.

Table 43
Neighborhood Preservation, December 31, 2017

Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Undeveloped Lots (By Right)	142	0	261	403	33.4
Undeveloped Lots (From Density Transfer)	1	0	22	23	0.7
Total Undeveloped Lots	143	0	283	426	34.1
Developed Lots (By Right)	370	60	37	467	80.9
Developed Lots (From Density Transfer)	17	6	3	26	4.2
Total Developed Lots	387	66	40	493	85.1
Open Space					188.3
Roadway					26.7
Other					0.9
Total	530	66	323	919	335.1 82.1%

East Preserved Land - Sending Parcels Easement Holder	Preservation Parcels	Acres
Howard County Government	12	69.8
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Taylor Properties Community Association, Inc.	1	3.3
Total Preservation	13	73.1 17.9%
GRAND TOTAL		408.2 100.0%

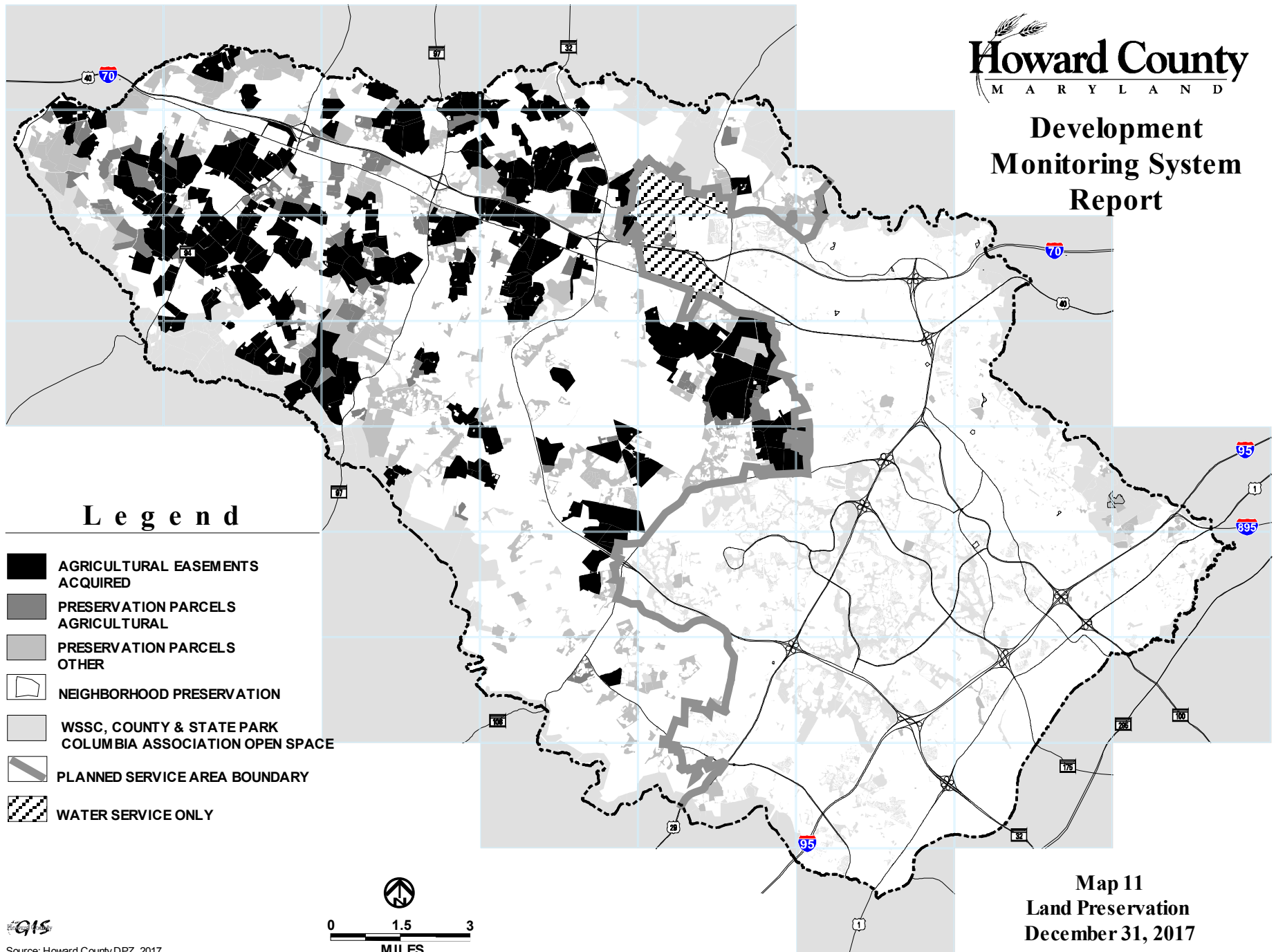
Table 44
East Preservation Easements, December 31, 2017

Type	Acres	Percent
Neighborhood Preservation	73	100%
Permanent Historic Easements	194	29%
Maryland Environmental Trust Easements	316	48%
Land Trust Conservation Easements	112	17%
Agricultural Easement (County Purchased)	37	6%
Total Other Easements	659	100%
TOTAL EAST PRESERVATION (1)	693	

(1) Total excludes double count of 39 acres on the Belmont property that has both a neighborhood preservation and a permanent historic easement on it.



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, 2017.



Map 11
Land Preservation
December 31, 2017

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 24 non-residential subdivision plans were recorded totaling 348 acres (Table 45). It should be noted that many of these are resubdivisions that do not create new lots, but simply create new easements. Also, some are parcel consolidations where the net number of lots actually get reduced.

Table 45
Recorded Non-Residential Subdivisions in 2017

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	1	NA	2	8%	14	4%
All Other Columbia	(6)	NA	6	25%	112	32%
Elkridge	0	NA	5	21%	57	16%
Ellicott City	0	NA	1	4%	1	0%
Rural West	0	NA	1	4%	21	6%
Southeast	1	NA	9	38%	144	41%
TOTAL	(4)	NA	24	100%	348	100%

Table 46 shows the recorded non-residential subdivisions from January 1, 2013 to December 31, 2017. Over this five year period there were 44 non-residential lots recorded countywide in 89 subdivision plans totaling 1,479 acres. This amounts to an annual average over the five year analysis time period of 9 lots in 18 plans encompassing 296 acres.

Table 46
Recorded Non-Residential Subdivisions, 2013 to 2017

Countywide	Lots	Plans	Acreage
2013	4	24	293
2014	8	17	407
2015	12	18	231
2016	20	30	548
2017	(4)	24	348
TOTAL	44	89	1,479
ANNUAL AVG.	9	18	296

In-Process Plans

Countywide, there were 37 non-residential subdivision plans in process as of December 31, 2017. This compares to 34 plans in process for the previous reporting period (Table 47). Eleven plans were in Columbia, 11 plans in Elkridge, 7 plans in the Southeast, 5 plans Downtown Columbia, 3 plans in Ellicott City, and no plans in the Rural West. Most of the plans were in the final plan or environmental concept plan stage.

Table 48 shows the number of potential non-residential lots in process. As of December 31, 2017, there were 48 lots in process, compared to 22 in process on December 31, 2016. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 660 non-residential acres in the subdivision process as of December 31, 2017 (Table 49). This compares to 353 acres in process one year earlier. For the current year the greatest acreage amount is in Elkridge (273 acres). This is followed by the Southeast with 252 acres, 61 acres in Downtown Columbia, 38 acres each in other parts of Columbia and 36 acres in Ellicott City.

Table 47
Number of Non-Residential Plans in Process, 12/31/17
with Comparisons to 12/31/2016 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	1	0	4	5
All Other Columbia	8	0	0	0	3	11
Elkridge	6	2	0	0	3	11
Ellicott City	0	0	1	0	2	3
Rural West	0	0	0	0	0	0
Southeast	3	1	0	0	3	7
TOTAL	17	3	2	0	15	37
12/31/16 Total	19	1	2	0	12	34

Table 48
Non-Residential Lots from Subdivision Plans in Process, 12/31/2017
with Comparisons to 12/31/2016 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	9	0	16	25
All Other Columbia	0	0	0	3	3
Elkridge	11	0	0	(1)	10
Ellicott City	0	1	0	0	1
Rural West	0	0	0	0	0
Southeast	2	0	0	7	9
TOTAL	13	10	0	25	48
12/31/16 Total	6	10	0	6	22

Table 49
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2017
with Comparisons to 12/31/2016 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	30	0	31	61
All Other Columbia	0	0	0	38	38
Elkridge	252	0	0	21	273
Ellicott City	0	21	0	16	36
Rural West	0	0	0	0	0
Southeast	63	0	0	189	252
TOTAL	315	51	0	295	660
12/31/16 Total	130	51	0	172	353

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 980,165 square feet were approved in 30 site development plans on 1,004 acres (Table 50). The greatest amount of square footage approved was in the Southeast, followed by Elkridge, Columbia, Downtown Columbia and Ellicott City.

Table 51 shows the approved square footage by building type. About 407,000 square feet, 42% of the total, are for office/service uses, most all of which is in the Southeast. About 354,000 square feet, 36% of the total, are for manufacturing/extensive industrial uses, split between Elkridge and Columbia. Retail uses account for about 104,000 square feet, and Government and institutional uses account for about 88,000 square feet. Chart 13 shows this breakdown graphically.

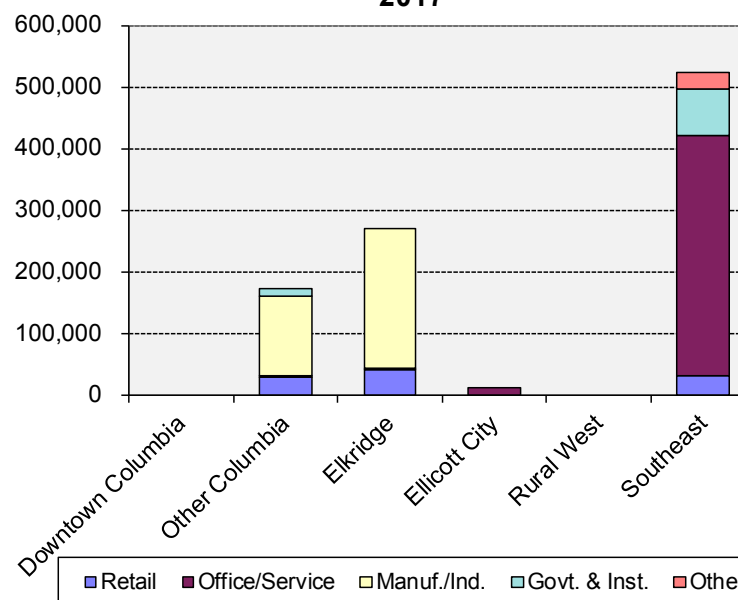
Table 51
Building Square Feet in Approved Non-Residential Site Development Plans in 2017

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	30,416	1,570	127,749	12,945	0	172,680
Elkridge	40,857	4,126	225,944	0	0	270,927
Ellicott City	0	12,404	0	0	0	12,404
Rural West	0	0	0	0	0	0
Southeast	32,284	389,067	0	75,000	27,803	524,154
TOTAL	103,557	407,167	353,693	87,945	27,803	980,165
PERCENT	10.6%	41.5%	36.1%	9.0%	2.8%	100.0%

Table 50
Approved Non-Residential Site Development Plans in 2017

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	2	7%	23	2%
All Other Columbia	172,680	18%	9	30%	96	10%
Elkridge	270,927	28%	8	27%	174	17%
Ellicott City	12,404	1%	2	7%	592	59%
Rural West	0	0%	0	0%	0	0%
Southeast	524,154	53%	9	30%	119	12%
TOTAL	980,165	100%	30	100%	1,004	98%

Chart 13
Sq. Ft. in Approved Site Development Plans 2017



Last Year's Projects - Greater than 15,000 Square Feet

Of the 980,165 square feet of non-residential building space approved in site development plans last year, most all were in plans with more than 15,000 square feet. These larger plans are shown in Table 52. The locations of these plans are shown on Map 12.

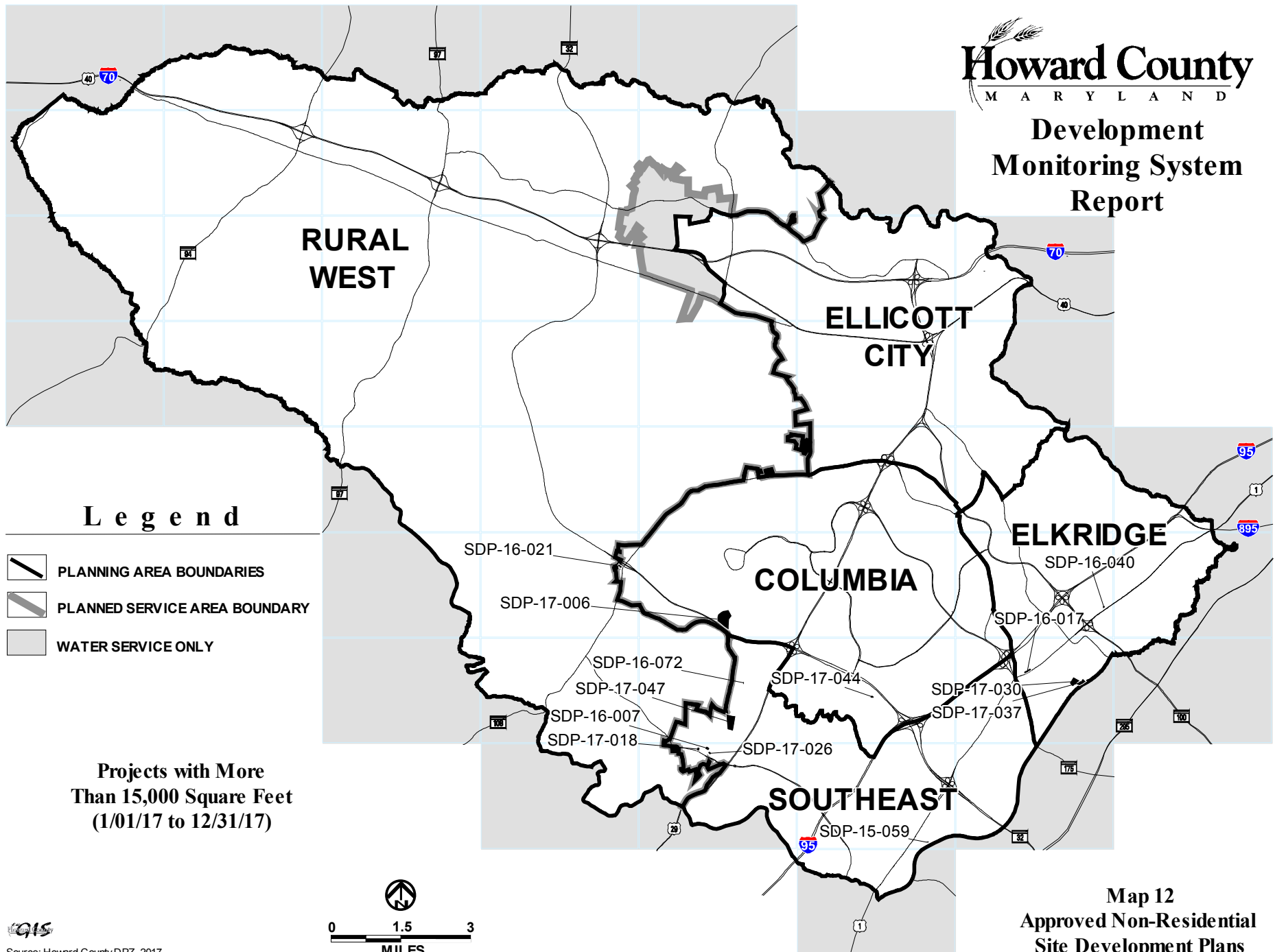
In Columbia (non-Downtown), 3 plans with more than 15,000 square feet were approved last year—the Guilford Self-Storage facility, retail and restaurant space as part of Antwerpen Properties, and a warehouse in Grace Tech Park. In Elkridge, two warehouse buildings in the Terrapin Commerce Center, a retail building in Howard Square and a small shopping center in the Troy Hill Corporate Center were approved. The Southeast

saw the most activity, with approvals for 6 large non-residential projects—an office building in the Johns Hopkins University APL campus, a hotel and office space in Maple Lawn Farms, the Arbor Terrage Fulton nursing home, a maintenance building at Johns Hopkins APL, a retail building in Maple Lawn and the Emilia Gymnasium.

Table 52
Projects With More Than 15,000 Square Feet in Approved Non-Residential Site Development Plans in 2017

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-17-044	Guilford Self Storage	Self Storage Facility	112,426	153,920
	SDP-16-021	Antwerpen Properties	Restaurant & Retail	24,601	
	SDP-17-006	Grace Tech Park	Warehouse	16,893	
Elkridge	SDP-17-030	Terrapin Commerce Center	Warehouse	126,000	257,794
	SDP-17-037	Terrapin Commerce Center	Warehouse	93,500	
	SDP-16-017	Howard Square	Retail	22,304	
	SDP-16-040	Troy Hill Corporate Center	Shopping Center	15,990	
Southeast	SDP-17-047	Johns Hopkins University APL - South Campus	Office	263,000	512,128
	SDP-16-007	Maple Lawn Farms	Hotel and Office	108,667	
	SDP-17-018	Arbor Terrace Fulton	Nursing Home	75,000	
	SDP-16-072	Johns Hopkins University APL	Maintenance Building	27,803	
	SDP-17-026	Maple Lawn Farms	Retail	20,258	
	SDP-15-059	Emilia Gymnasium	Fitness Center	17,400	
TOTAL					923,842

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Five Year Results

Table 53 shows the countywide approved non-residential site development plans for the last five reporting periods from January 1, 2013 to December 31, 2017. Over this timeframe there were 126 plans approved on 2,366 acres including close to 4.7 million square feet of building space. This equates to an annual average of about 932,000 square feet of new building space approved per year.

Last year, with 980,165 square feet of approved space, was more than the 721,000 square feet approved the year before. Chart 14 depicts these annual amounts.

Table 54 shows the five year history by building type. Over the five years, about 36% of the total 4.7 million square feet was for office/service space. About 33% was for manufacturing/extensive industrial space, 17% for government and institutional uses, 12% for retail uses and about 2% for other uses.

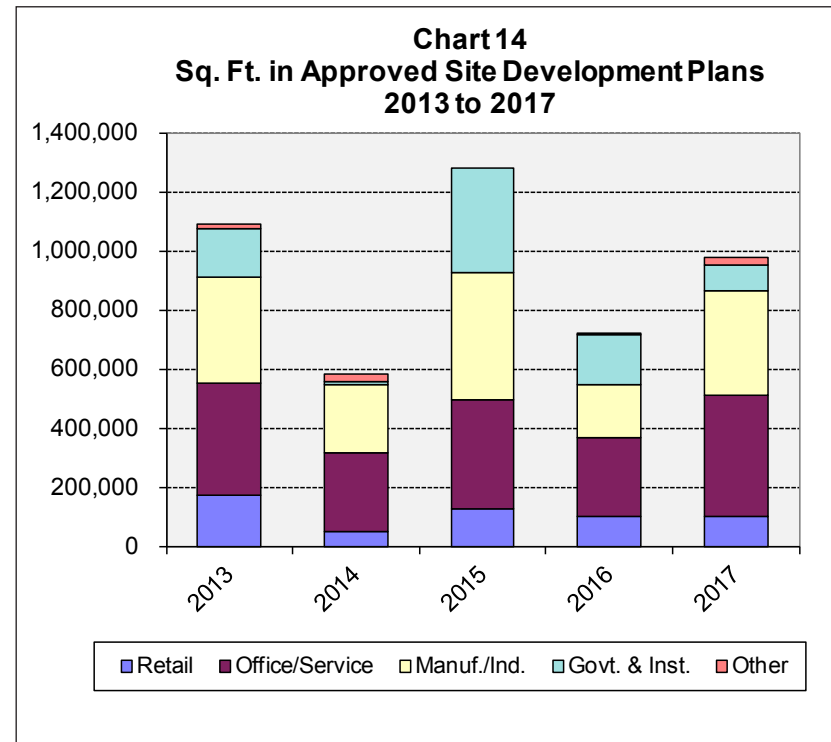


Table 53
Approved Non-Residential Site Development Plans
2013 to 2017

Year	Square Feet	Number or Plans	Acreage
2013	1,091,021	31	424
2014	583,425	23	379
2015	1,281,525	23	405
2016	721,415	19	154
2017	980,165	30	1,004
TOTAL	4,657,551	126	2,366
ANNUAL AVG.	931,510	25	473

Table 54
Building Square Feet in Approved Non-Residential Site Development Plans
2013 to 2017

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2013	175,929	379,888	355,902	164,677	14,625	1,091,021
2014	50,646	265,305	233,866	11,664	21,944	583,425
2015	126,246	373,591	428,019	353,669	0	1,281,525
2016	102,933	264,346	183,026	167,110	4,000	721,415
2017	103,557	407,167	353,693	87,945	27,803	980,165
TOTAL	559,311	1,690,297	1,554,506	785,065	68,372	4,657,551
PERCENT	12.0%	36.3%	33.4%	16.9%	1.5%	100.0%

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, 2017, are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 26 non-residential site development plans in process as of December 31, 2017. These plans include about 1.8 million square feet of building space covering 216 acres. This compares to about 870,000 square feet in 37 plans on 447 acres that were in process the previous year (on December 31, 2016).

As shown in Table 55, Downtown Columbia had the most square footage in process, followed by the Southeast and then Elkridge. Table 56 shows a more detailed breakdown of square footage by building type. Close to one million square feet are for office/service uses, 231,000 square feet for manufacturing/extensive industrial uses, 231,000 square feet for government and institutional uses, and 215,000 square feet for retail uses. Other uses account for close to 124,000 square feet.

Projects Greater than 15,000 Square Feet

Table 57 shows site development plans with buildings greater than 15,000 square feet. Map 13 shows the locations of these projects. These projects account for about 96% of the total 1.8 million square feet in process.

Table 55
In-Process Non-Residential Site Development Plans, 12/31/17
with Comparisons to Countywide In-Process on 12/31/16

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	613,689	34%	3	12%	45	21%
All Other Columbia	269,015	15%	4	15%	13	6%
Elkridge	292,986	16%	6	23%	63	29%
Ellicott City	18,688	1%	3	12%	9	4%
Rural West	39,096	2%	3	12%	14	7%
Southeast	586,492	32%	7	27%	73	34%
TOTAL	1,819,966	100%	26	100%	216	100%
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12/31/2016	869,714		37		447	

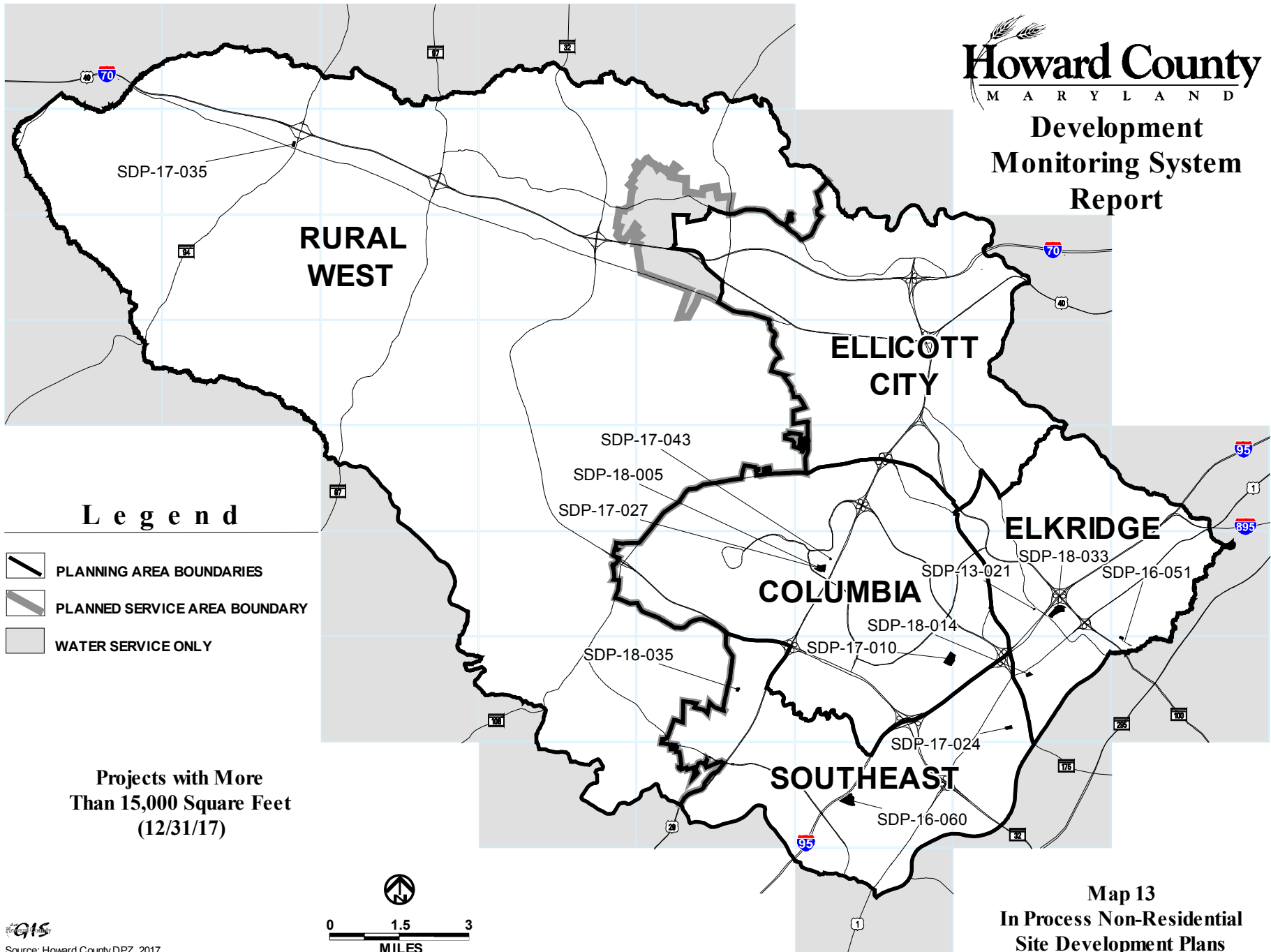
Table 56
Building Square Feet in In-Process Site Development Plans, 12/31/17
with Comparisons to Countywide In-Process on 12/31/16

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other	TOTAL
All Other Columbia	11,439	257,576	0	0	0	269,015
Elkridge	5,166	0	75,800	206,855	5,165	292,986
Ellicott City	18,688	0	0	0	0	18,688
Rural West	12,966	1,716	0	24,414	0	39,096
Southeast	8,103	400,499	175,200	0	2,690	586,492
TOTAL	215,429	998,721	251,000	231,269	123,547	1,819,966
PERCENT	11.8%	54.9%	13.8%	12.7%	6.8%	100.0%
<hr/>						
12/31/2016	134,934	571,821	23,337	134,457	5,165	869,714




Table 57
Projects With More Than 15,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/17

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-17-027	Crescent Neighborhood	Office/Retail/Restaurant	419,257	613,689
	SDP-17-043	Crescent Neighborhood	Arts Center	115,692	
	SDP-18-005	Crescent Neighborhood	Retail/Restaurant	78,740	
Columbia	SDP-17-010	7125 Columbia Gateway Drive	Office Building/Restaurant	254,500	254,500
Elkridge	SDP-18-033	Sheppard Pratt Behavior Health Facility	Medical Facility	155,691	282,655
	SDP-16-051	Oxford Square	Self-Storage Facility	75,800	
	SDP-18-014	Waterloo Fire Station	Fire Station	32,455	
	SDP-13-021	Mayfield Logistics Facility	Government Facility	18,709	
Rural West	SDP-17-035	Lisbon Volunteer Fire Company	Fire Station	24,414	24,414
Southeast	SDP-18-035	Johns Hopkins University APL	Office - Laboratory	210,500	569,876
	SDP-16-060	Emerson Corporate Commons	Office Building	184,176	
	SDP-17-024	Maryland Wholesale Food	Warehouse	175,200	
TOTAL					1,745,134

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

**Projects with More
Than 15,000 Square Feet
(12/31/17)**

**Map 13
In Process Non-Residential
Site Development Plans**


Source: Howard County DPZ, 2017.

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, 2017, to December 31, 2017, 82 permits were issued for about 678,000 square feet in non-residential building space (Table 58). The greatest amount of square footage was in the Southeast, followed by the non-downtown portion of Columbia.

Table 58
Issued Non-Residential Building Permits in 2017

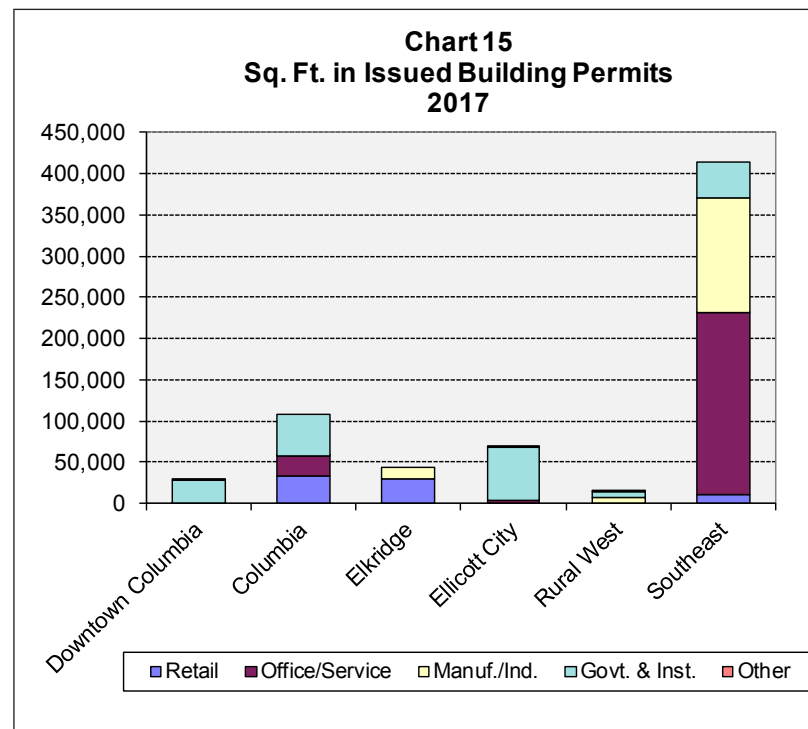
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	28,933	4%	5	6%
All Other Columbia	108,554	16%	20	24%
Elkridge	43,262	6%	8	10%
Ellicott City	67,579	10%	12	15%
Rural West	16,047	2%	6	7%
Southeast	413,818	61%	31	38%
TOTAL	678,193	100%	82	100%

Table 59 shows the approved square footage by building type. About 248,000 square feet, 37% of the total, are for office/service uses, the majority of which is in the Southeast. Another 28%, about 192,000 square feet, are for governmental and institutional uses. About 24% of the total, or 161,000 square feet, are for manufacturing/extensive industrial uses, and 11% (75,000 square feet) are for retail uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 59
Building Square Feet in Issued Non-Residential Building Permits in 2017

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	548	0	0	27,425	960	28,933
All Other Columbia	33,244	23,908	1,063	50,339	0	108,554
Elkridge	30,538	0	12,724	0	0	43,262
Ellicott City	0	3,221	0	64,198	160	67,579
Rural West	0	0	7,360	7,682	1,005	16,047
Southeast	10,892	220,998	139,499	42,429	0	413,818
TOTAL	75,222	248,127	160,646	192,073	2,125	678,193
PERCENT	11.1%	36.6%	23.7%	28.3%	0.3%	100.0%

Chart 15
Sq. Ft. in Issued Building Permits 2017



Last Year's Projects - Greater than 25,000 Square Feet

Of the 678,000 total square feet of non-residential building space in issued permits over the current reporting period, 515,000 square feet, 76% of the total, were in projects larger than 25,000 square feet. These larger buildings and structures are shown in Table 60. The location of these buildings are shown on Map 14.

The largest project consists of a 108,000 square foot self-storage building on Guilford Road in the Southeast. Other large buildings in the Southeast include a 103,000 square foot office building in Maple Lawn, a 79,000 square foot Residence Inn hotel, a 42,000 square foot expansion to the Howard County wastewater treatment facility, a smaller 30,000 square foot office building in Maple Lawn, and a new 28,000 square foot warehouse building at the Johns Hopkins APL.

In Columbia, a building permit for a new 50,000 square foot Columbia Association indoor tennis club was issued in 2017.

In Ellicott City, a 48,000 square foot addition was added to the Bethel Korean Presbyterian Church.

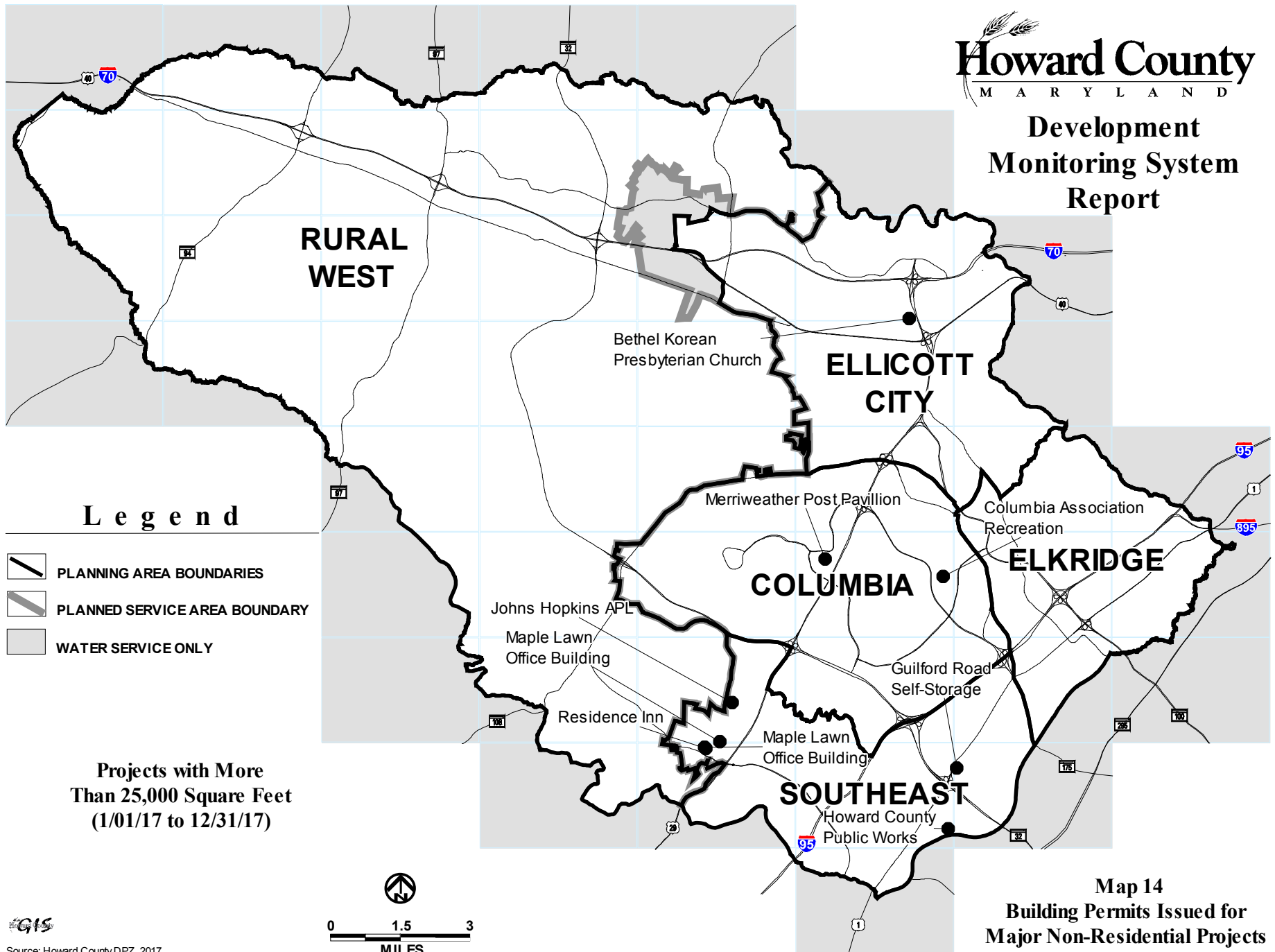
In Downtown Columbia, building permits were issued in 2017 as part of the Merriweather Post Pavilion renovation project totalling 27,000 square feet.

Table 60
Building Permits Issued for Major Non-Residential Projects With More Than 25,000 Square Feet in 2017




Region	Name	Proposed Use	Square Feet	TOTAL
Downtown Columbia	Merriweather Post Pavilion	Box Office, Restrooms, Backstage Office	27,425	27,425
Columbia	Columbia Association Recreation	Indoor Tennis Club	49,766	49,766
Ellicott City	Bethel Korean Presbyterian Church	Church Addition	47,831	47,831
Southeast	Guilford Road Self-Storage	Self-Storage Building	107,640	
	Maple Lawn Office Building	Office Building	103,172	
	Residence Inn	Hotel	78,972	
	Howard County Public Works	Wastewater Treatment Facility Improvements	42,429	
	Maple Lawn Office Building	Office Building	29,560	
	Johns Hopkins APL	Warehouse Building	28,059	
TOTAL				514,854

Howard County M A R Y L A N D

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

**Projects with More
Than 25,000 Square Feet
(1/01/17 to 12/31/17)**



Source: Howard County DPZ, 2017.



**Map 14
Building Permits Issued for
Major Non-Residential Projects**

Five Year Results

Table 61 shows issued non-residential building permits countywide for the last five reporting periods from 2013 to 2017. Over this five year time-frame there were 416 permits issued for close to 5.8 million square feet of building space. This equates to an annual average of about 1.2 million square feet per year.

The latest reporting period, with 678,000 square feet in issued permits, is a 56% decrease from the close to 1.6 square feet permitted the year before, and the least amount of all five years.

Table 62 shows the five year history by building type. Over the five years, 29% of the total 5.8 million square feet was for office/service space. About 29% was manufacturing/extensive industrial space, another 22% for government and institutional uses and 11% for retail space. Chart 16 shows this five year history graphically.

Table 61
Issued Non-Residential Building Permits
2013 to 2017

Year	Square Feet	Number of Permits
2013	1,327,421	90
2014	915,359	67
2015	1,280,147	88
2016	1,556,122	89
2017	678,193	82
TOTAL	5,757,242	416
ANNUAL AVG.	1,151,448	83

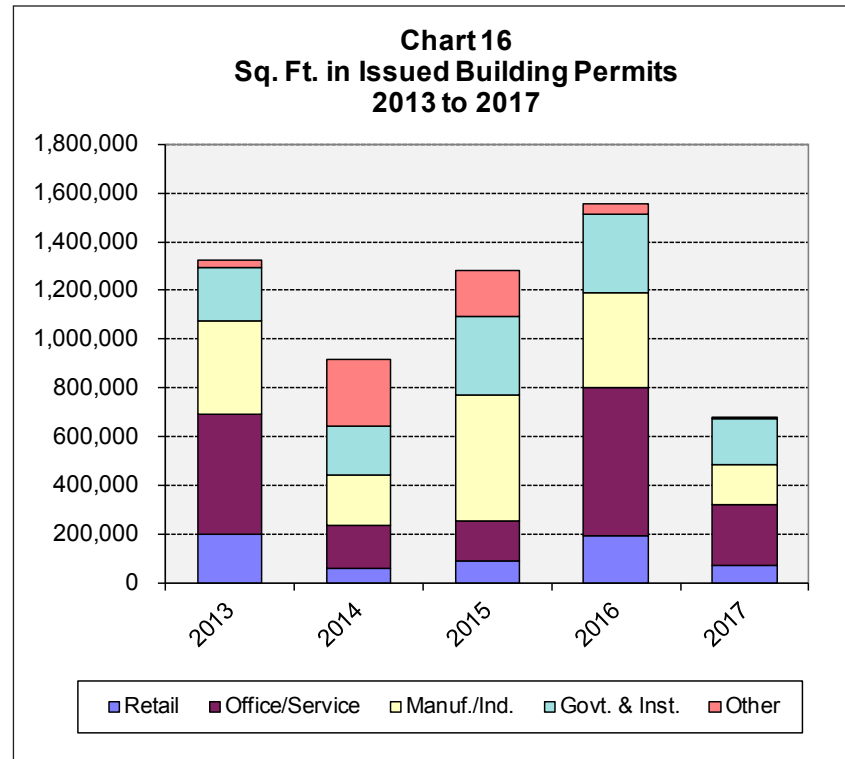


Table 62
Building Square Feet in Issued Non-Residential Building Permits
2013 to 2017

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2013	202,457	490,437	383,615	216,024	34,888	1,327,421
2014	61,809	175,405	205,292	199,862	272,991	915,359
2015	92,482	161,620	517,991	321,881	186,173	1,280,147
2016	192,019	609,632	390,168	323,500	40,803	1,556,122
2017	75,222	248,127	160,646	192,073	2,125	678,193
TOTAL	623,989	1,685,221	1,657,712	1,253,340	536,980	5,757,242
PERCENT	10.8%	29.3%	28.8%	21.8%	9.3%	100.0%

Employment Estimates

New job potential has been estimated based on the standard square feet per employee factors shown in Table 63. These factors are multiplied times the square footage of planned building space which is included on approved site development plans and building permits.

Table 63
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, 2017, to December 31, 2017, could accommodate an estimated 2,417 employees (Table 64). About 74% of the potential jobs are located in the Southeast, mostly office jobs. About 14% of the potential jobs are located in Elkridge, 10% are located in non-Downtown Columbia, and 2% located in Ellicott City.

Countywide, 1,629 potential jobs, about 67% of the total, are office/service jobs. Another 354 are manufacturing/extensive industrial jobs (15%), 259 are retail jobs (11%), and 176 are government & institutional jobs (7%).

Table 64
Potential Employment from Approved Non-Residential SDP's in 2017
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	76	6	128	26	236	10%
Elkridge	102	17	226	0	345	14%
Ellicott City	0	50	0	0	50	2%
Rural West	0	0	0	0	0	0%
Southeast	81	1,556	0	150	1,787	74%
TOTAL	259	1,629	354	176	2,417	100%
PERCENT	10.7%	67.4%	14.6%	7.3%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 65 below, there is a potential of 1,725 new jobs that could be accommodated based on issued building permits. About 58% of the total are potential office/service jobs, mostly in the Southeast. This is followed by 22% government and institutional jobs, 11% retail jobs and 9% manufacturing/extensive industrial jobs.

Table 65
Potential Employment from Issued Building Permits in 2017
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	1	0	0	55	56	3%
All Other Columbia	83	96	1	101	280	16%
Elkridge	76	0	13	0	89	5%
Ellicott City	0	13	0	128	141	8%
Rural West	0	0	7	15	23	1%
Southeast	27	884	139	85	1,136	66%
TOTAL	188	993	161	384	1,725	100%
PERCENT	10.9%	57.5%	9.3%	22.3%	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 there are a lot more non-wage and salary jobs. These would include proprietors and also include part-time jobs.

Table 66 shows both DLLR and BEA employment data beginning in 2001. BEA data have a one year reporting time lag resulting in no available data for 2017. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,145 jobs per year for the last 16 years. Job losses for 2009 and 2010 due to the most recent recession, and losses in a few other years, as reported by DLLR have lowered this longer term average.

Jobs reported by the BEA through 2016 (the latest year available) result in an annual average of 4,020 new jobs from 2001 to 2016. This higher average job growth reflects the increasing number of proprietors.

For the most recent reporting period, from 2016 to 2017, the State reports an increase of 2,663 jobs in Howard County. This follows a larger 5,507 job increase the previous year.

Table 67 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2016 and 2017. In the first quarter of 2017, DLLR reported that there were 167,701 jobs in Howard County with an average weekly wage of \$1,309. This compares to 165,038 jobs one year earlier with an average wage of \$1,232 reflecting a 6.25% increase in average weekly wages over the one year time period.

Table 66
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Change	Jobs	Increase
2001	130,717		171,973	
2002	133,338	2,621	174,171	2,198
2003	133,231	(107)	174,545	374
2004	136,493	3,262	179,778	5,233
2005	135,462	(1,031)	185,363	5,585
2006	141,236	5,774	194,174	8,811
2007	145,385	4,149	198,615	4,441
2008	147,573	2,188	200,614	1,999
2009	142,266	(5,307)	199,142	(1,472)
2010	141,169	(1,097)	200,591	1,449
2011	147,357	6,188	206,914	6,323
2012	154,504	7,147	213,683	6,769
2013	156,400	1,896	217,518	3,835
2014	155,951	(449)	219,493	1,975
2015	159,531	3,580	227,144	7,651
2016	165,038	5,507	232,266	5,122
2017	167,701	2,663		
Average		2,145		4,020

1. Maryland State Department of Labor, Licensing and Regulation

(1st quarter employment)

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

Table 67
Jobs and Weekly Wages by Industry, 2016 and 2017

Job Type	2016		2017	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	632	\$1,467	629	\$1,557
State Government	1,818	\$987	1,738	\$1,020
Local Government	14,949	\$973	14,814	\$1,067
Subtotal/Average	17,399	\$993	17,181	\$1,080
Goods Producing				
Natural Resources and Mining	261	\$768	297	\$941
Construction	11,089	\$1,275	11,398	\$1,369
Manufacturing	7,747	\$1,510	8,124	\$1,692
Subtotal/Average	19,098	\$1,364	19,820	\$1,495
Service Providing				
Trade, Transportation, and Utilities	34,327	\$1,067	33,998	\$1,067
Information	3,315	\$1,845	3,947	\$2,258
Financial Activities	9,715	\$1,809	10,042	\$1,935
Professional and Business Services	44,243	\$1,707	44,814	\$1,800
Education and Health Services	18,249	\$860	18,342	\$906
Leisure and Hospitality	14,342	\$377	15,105	\$408
Other Services	4,350	\$694	4,447	\$746
Subtotal/Average	128,541	\$1,245	130,695	\$1,311
TOTAL	165,038	\$1,232	167,701	\$1,309

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

Howard County Department of Planning and Zoning
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