



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

May 2012

A Message from the Planning Director:

I am pleased to present this year's Development Monitoring System report (DMS). The DMS report has been issued each year since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. Beginning with last year's report, the reporting period has been adjusted to include the full calendar year, rather than an October 1 through September 30 time period. This is a result of amendments to State law, known collectively as the Smart, Green and Growing legislation, that require local jurisdictions to report annually with reports due in July covering development and other activity for the previous calendar year.

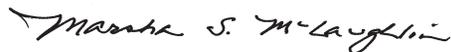
Most of the reporting requirements in the Smart, Green and Growing legislation had already been included in our DMS reports. However, there are some additional smart growth measures and indicators now included such as descriptions of zoning map and text amendments, subdivision regulation amendments, new General Plan elements and amendments, residential density, and new infrastructure. The section of this report beginning on Page 7 includes this additional information. A summary of what's new can be found on Page 2.

For the second time, we have also included information on neighborhood preservation in the eastern part of the County as a result of the density exchange option that was added to the zoning regulations effective in September 2008. Several projects have utilized this option, and the results are highlighted in the section on Land Preservation (beginning on Page 50). Land preservation in the Rural West was also very active during this reporting period with over 1,000 acres preserved in the County's Agricultural Land Preservation program or as dedicated environmental easements, the most since 1996.

This DMS report summarizes all development activity in the County from initial subdivision sketch plan to final use & occupancy permit. Both residential and nonresidential development are evaluated with comparisons to previous years' development activity going back five years. For the latest reporting period, there were 1,647 housing units completed in the County. Of these, 30% were single family detached homes, 27% were townhouses and 43% were condo or rental apartments. This is 44% more homes built than during last year's reporting period on an average monthly basis and may be an indication that the housing market is recovering from the recent downturn in the economy. However, building starts were down 20% this reporting period compared to the last, an indication that consistent stronger residential market demand has not yet come to fruition.

This report shows that the recent recession has clearly impacted the non-residential market in Howard County. Building permits were issued for about 778,000 square feet of non-residential space in the latest reporting period, the smallest amount ever reported since the DMS was established in 1992. It is clear from the data that there has been a slowing trend in non-residential development over the last five years. Five years ago almost 2.2 million square feet of building space was permitted for construction. There is anticipation, however, that the commercial building market will strengthen as the economy continues to recover and the impact from Fort Meade growth and cyber security initiatives persist. The County is expected to continue to attract employers and residents given its location, excellent school system, and high quality of life.

Sincerely,



Marsha S. McLaughlin,
Department of Planning and Zoning

Development Monitoring System Report

Date Issued:

May 2012

Reporting Period:

January 1, 2010 to December 31, 2011
With countywide summaries from 2006

Produced by:

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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 establishes the annual number of housing unit allocations for new homes that can move through the development process. 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 to keep pace with new growth.

Currently, there are 37 housing units being delayed due to the APFO allocations test, all on hold in the Elkridge Planning Area. Planning for these units will be allowed to proceed once allocations become available. The Open/Closed schools test occurs after allocations are received. Currently, there are three elementary school and one middle school districts closed to development. Thus far into the current fiscal year, 1 project with 2 units are on hold due to closed schools.

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

Development Monitoring System Report (DMS)

This is the 20th 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.

New Reporting Requirements and Timeframe

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

DPZ has issued an annual Development Monitoring System (DMS) report since 1992 when the County's Adequate Public Facilities Ordinance was first adopted. This report had covered development activity from October 1 through September 30 each year. Since the new reporting requirement from the State stipulates that the period covered is to be January through December, the DMS has been adjusted to report on a calendar year. This is the second DMS report that incorporates this time adjustment and covers calendar year 2011.

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

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

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

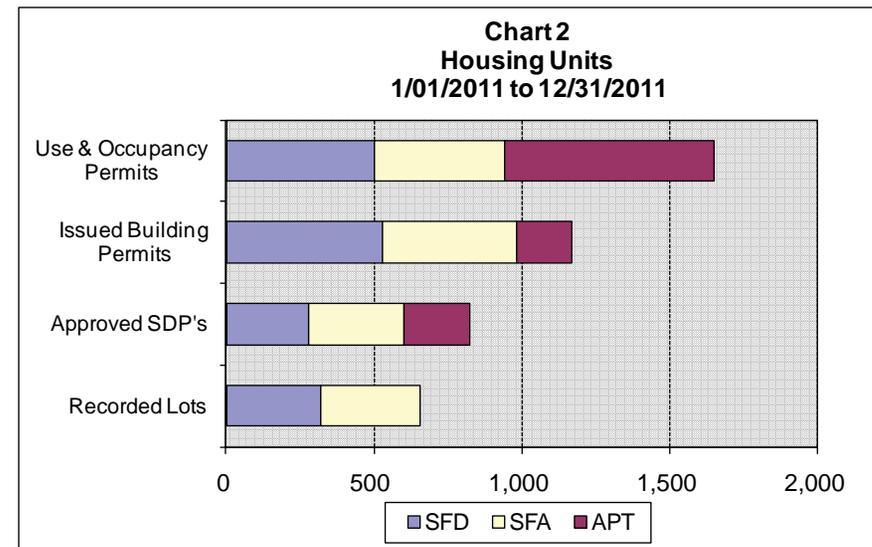
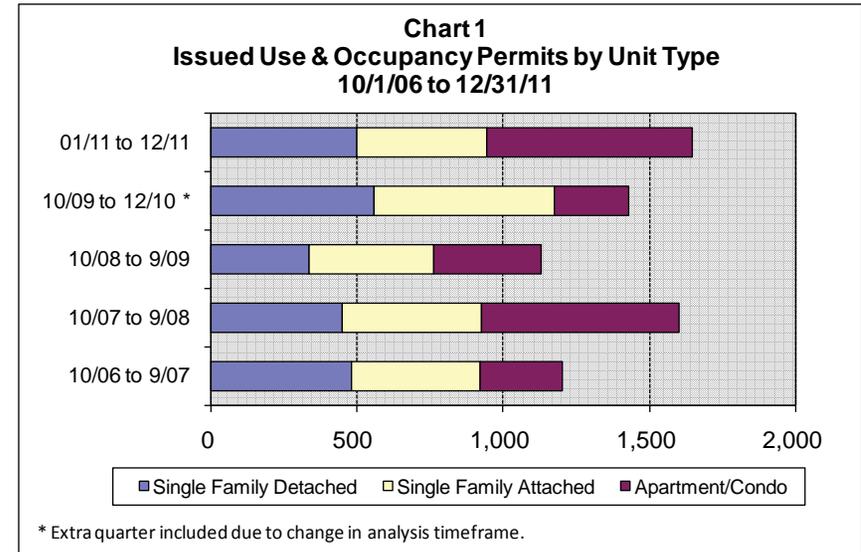
The sections below summarize the development activity in this year's report. The 2000 General Plan Policies Map on Page 6 shows the five Planning Areas that are used in the analysis.

Residential Development

Total Housing Activity

- Over the last five years, there has been an annual average of 1,335 new housing units built in the County. About one-third of these have been single family detached, one-third single family attached or townhouse units, and one-third apartment units (including both rental and condo). (Chart 1)
- During the latest reporting period, from January through December 2011, 1,647 housing units were built. This is an increase from the previous reporting period when 1,427 units were built, and the greatest number built over each of the last five years. (Chart 1)
- Of the 1,647 completed units last year, 30% were for single family detached, 27% for townhouse, and 43% for apartment units (condo or rental). Greater percentages of townhouse and apartment units are likely to persist given the zoning of the undeveloped land in the County as well as redevelopment initiatives.
- Last year, about 41% of all units were built in the Southeast, 19% in Ellicott City, 16% in Columbia, 13% in Elkridge, and 11% in the Rural West. (See map on Page 6 that show these five planning areas.)
- The number of building permits issued (housing starts) during this current reporting period was 1,172. This is significantly less than the 1,833 permits issued during the previous reporting period.
- Over the latest reporting period, there was potential for 656 units from recorded lots and 823 units approved in site development plans (Chart 2).
- As of December 31, 2011 there were 8,018 units in the subdivision process. This represents all units in plans under review prior to being recorded or approved in a site plan. This compares to 8,108 units in process for the prior reporting period (December 31, 2010).
- A significant number of the in-process units – 7,236 or 90% of the total 8,018 – are part of phased projects with development planned as far out as 2020. The larger phased plans include Maple Lawn and Laurel Park Station in the Southeast, The Overlook at Blue Stream, Oxford Square and Howard Square in Elkridge, and Turf Valley and the Courtyards in Ellicott City.
- Countywide, 21% of the units in process on December 31, 2011 were

single family detached units. About 23% were single family attached units and another 55% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 234 age-restricted housing units built between January and December 2011, 14% of the total 1,647 units built in the County. These 234 units consisted of 6 single family detached units, 46 townhomes and 182 apartment or condo units. Most of the units were built in Ellicott City.
- As of December 31, 2011 there were 689 age-restricted units in the planning process – 93 single family detached units, 184 townhouse units and 412 apartment or condo units. About 81% these are in Ellicott City with the remaining 19% in Columbia. For the previous reporting period there were 890 age-restricted units in process, 201 more than the current year.

Moderate Income Housing Units

- For the current reporting period there were 51 MIHU units in approved plans - 10 single family detached units, 8 townhouse units and 33 apartment or condo units. This is less than the 70 approved MIHU units the previous reporting period.
- As of December 31, 2011 there were 881 MIHU units in process – 149 townhomes and 732 apartment or condo units. About 73% of the units were in Elkridge, 17% in the Southeast, 8% in Ellicott City and 2% in Columbia. By comparison, there were 771 MIHU units in process the previous reporting period.
- Of the 881 MIHU units in process, 47 are age-restricted. This is about 5% of all MIHU units in process and includes 41 apartment or condo units and 6 townhomes.

Rural Land Preservation

- For the current reporting period, 1,018 acres of agricultural and environmentally sensitive land were permanently preserved in the Rural West. This includes 793 acres purchased through the Howard County Agricultural Land Preservation program. The other 225 acres were preserved as a result of subdivision activity using the cluster subdivision zoning regulations and Density/Cluster Exchange Options (DEO/CEO).
- Preservation easements in the Rural West have been steadily increasing and now total 29,344 acres. This includes 21,603 acres of agricultural preservation easements and 7,741 acres of environmental preservation parcels dedicated through the subdivision process. This totals 31% of the

land in the Rural West. Including park land, WSSC land and other environmental easements, 43% of the Rural West is now permanently preserved.

Housing Sales

- Home sales prices in Howard County increased last year. The median sales price for all housing types combined increased by 8.6% from \$350,000 to \$380,000. The mean sales price increased by 6.0%, from \$393,000 to \$416,000.
- Whereas single family detached and attached median home prices increased last year by 1.0% and 3.2% respectively, condos units, however, have continued to drop with median prices decreasing by 9.7%
- For the latest reporting period, the median sales price for condos was \$196,365. Townhouse units sold on average for \$308,000. The median single family detached home in the county sold for \$485,000.
- Mean sales prices were \$194,247 for condo units, \$330,800 for single family attached units and \$511,613 for single family detached units.

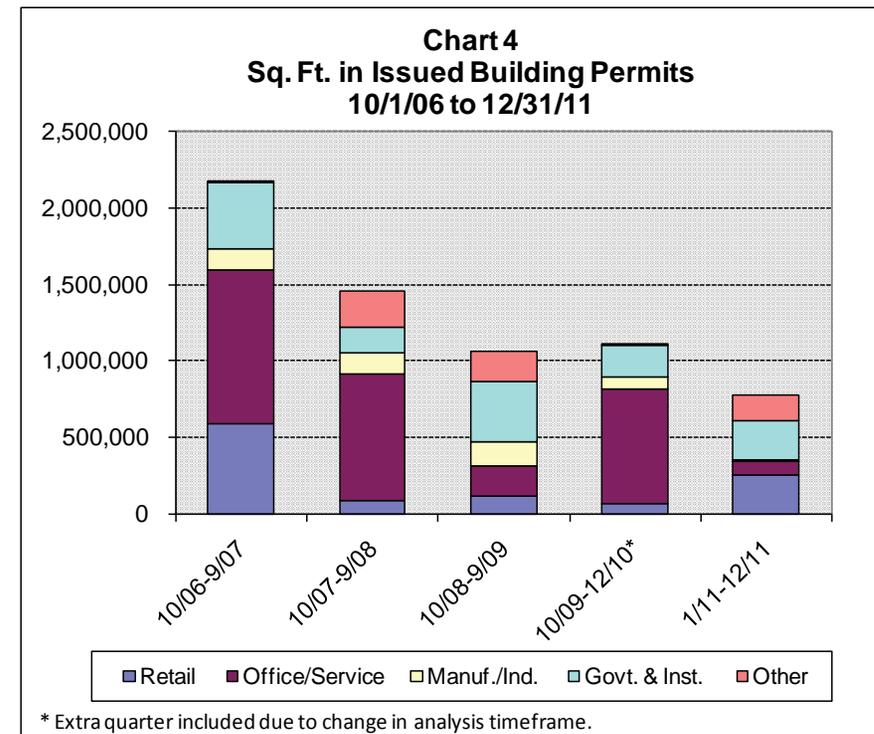
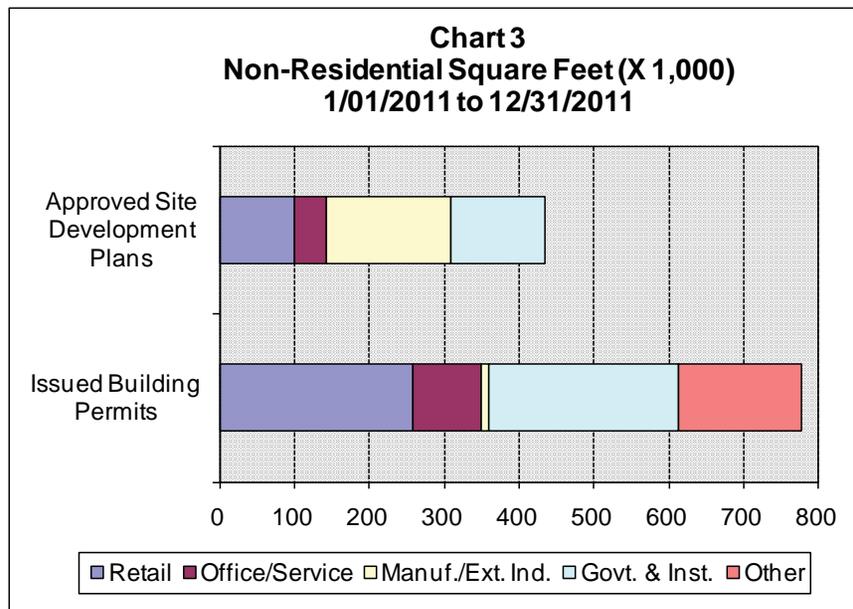
Net Density of Growth

- The greatest average net density of new residential construction in Howard County during 2011 occurred in the Southeast at 19.66 units per acre. This was followed by the Elkridge at 18.26 units per acre, Ellicott City at 13.56 units per acre and Columbia at 12.08 units per acre. The average net density for new residential construction in the Rural West was 0.89 units per acre. (Net density is calculated by dividing units by lot size based on a method outlined by the Maryland Department of Planning in order to obtain consistent reporting between jurisdictions.)

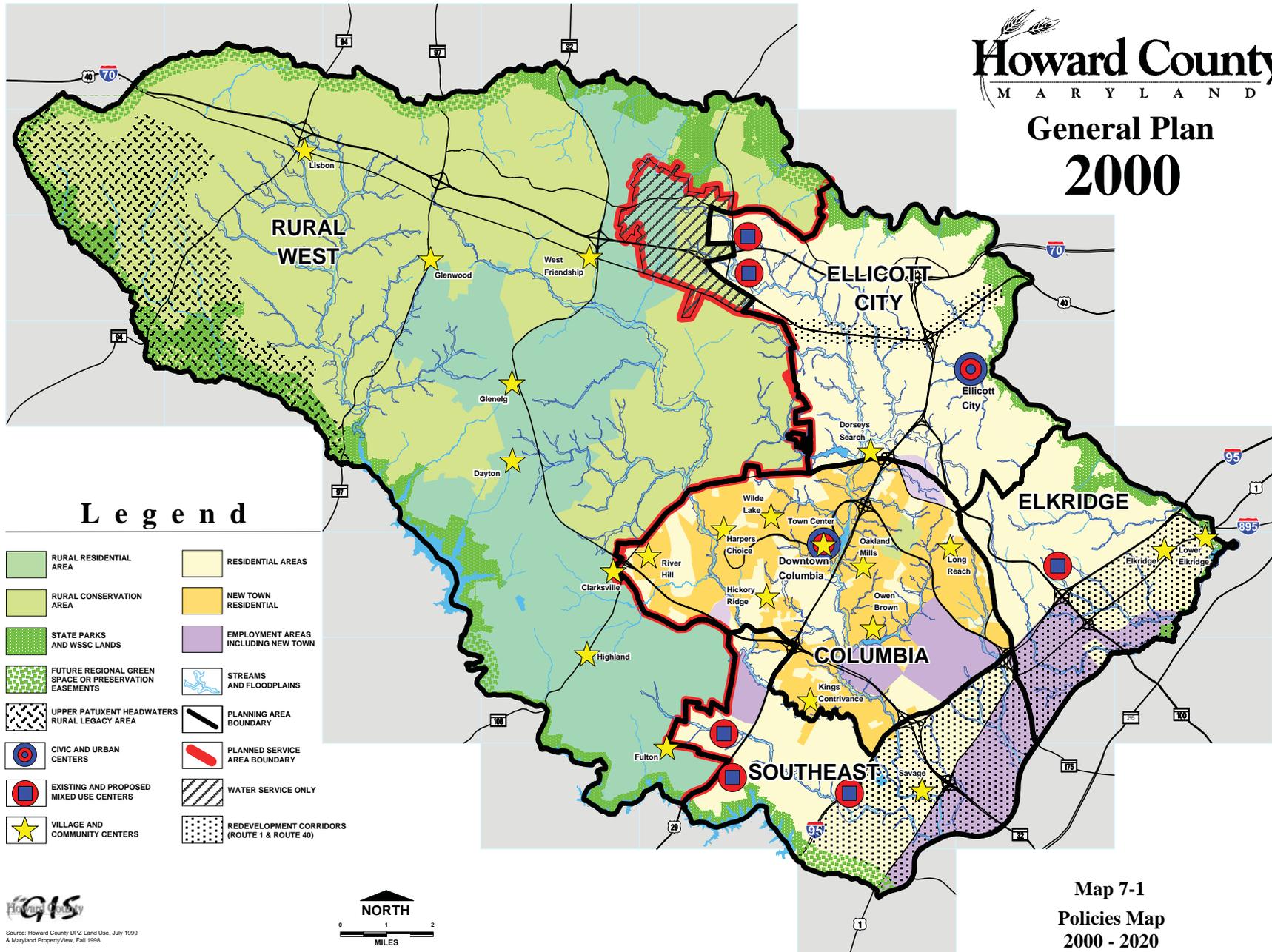
Non-Residential Development

- From January through December 2011, 434,000 square feet of building space were approved in site development plans. Building permits were issued for about 778,000 square feet. (Chart 3).
- As shown in Chart 4, there has been a steady annual slowdown in nonresidential construction activity from around 2.2 million square feet in the 2006/07 year. The latest 12 month reporting period had the smallest amount of permitted space over each of the last five years. In fact, last year with only 778,000 square feet in issued building permits was the smallest annual amount since this DMS report began in 1992.
- Over the last five years, there was an annual average of 1.2 million square feet in approved site development plans and 1.3 million square feet in issue building permits.

- Just over half of the new building space constructed last year is located in Columbia. About 16% is located in the Southeast, 14% in Ellicott City, 11% in Elkridge and 2% in the Rural West.
- As of December 31, 2011, there were 1.1 million square feet in-process in site development plans. This is close to the same amount in process the previous year..
- According to the State Department of Labor, Licensing and Regulation, the County gained 6,188 jobs last year (1st quarter 2010 to 1st quarter 2011 statistics), more than a 4% increase. This almost makes up for the 6,404 jobs that were lost over the previous two years (1st quarter 2008 to 1st quarter 2010) that resulted from the recent recession.



Howard County
 MARYLAND
General Plan
2000



Legend

- | | |
|---|--|
| RURAL RESIDENTIAL AREA | RESIDENTIAL AREAS |
| RURAL CONSERVATION AREA | NEW TOWN RESIDENTIAL |
| STATE PARKS AND WSSC LANDS | EMPLOYMENT AREAS INCLUDING NEW TOWN |
| FUTURE REGIONAL GREEN SPACE OR PRESERVATION EASEMENTS | STREAMS AND FLOODPLAINS |
| UPPER PATUXENT HEADWATERS RURAL LEGACY AREA | PLANNING AREA BOUNDARY |
| CIVIC AND URBAN CENTERS | PLANNED SERVICE AREA BOUNDARY |
| EXISTING AND PROPOSED MIXED USE CENTERS | WATER SERVICE ONLY |
| VILLAGE AND COMMUNITY CENTERS | REDEVELOPMENT CORRIDORS (ROUTE 1 & ROUTE 40) |

GIS
 Source: Howard County DPZ Land Use, July 1999 & Maryland Property View, Fall 1998.



Map 7-1
Policies Map
2000 - 2020

New 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 now 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.) These reports are due in July covering development activity for the previous calendar year.

The Maryland Department of Planning (MDP) has issued guidelines for the new State requirements which indicate how the reporting is to be phased in over time. Beginning in July 2011 local jurisdictions are required to include the smart growth measures and indicators. The DMS report, issued annually by DPZ for the last 20 years as required by the county's 1992 APFO law, already includes most of what is required per the State law and these items are included 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.

Information that is provided in this section include planning-related regulatory activity such as 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 or substantial changes in roads and other transportation facilities and new schools and additions to schools. A discussion on whether these changes are consistent with Howard County's General Plan and other items follows. APFO restrictions, required biannually, are also included in this year's report.

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 consistency with these goals.

Regulatory Activity

General Plan Amendments and New Elements (and related)

There were no General Plan amendments or new elements adopted in 2011. However, some related measures were adopted as noted below.

CB-56-2010 – Downtown Columbia Signs

In early 2011, revisions to the Howard County Sign Code were adopted to accommodate the new Downtown Columbia Plan, which had been adopted the previous year in 2010. The sign bill clarified certain sign requirements specific to Downtown Columbia including allowing signs of a certain size, allowing signs in the County rights-of-way, and allowing certain signs to be illuminated.

CR-138-2010 - Downtown Columbia Design Guidelines

A resolution was adopted for the Downtown Columbia Design Guidelines. These Guidelines will be used as a measure against which specific Neighborhood Design Guidelines will be developed for each of the five Downtown Columbia Neighborhoods (Warfield, Symphony Overlook, The Lakefront and Lakefront Core, The Mall, Merriweather-Symphony Woods and The Crescent.) The Neighborhood Design Guidelines will then be used to evaluate the design elements of specific projects downtown.

Zoning Regulation Amendments

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County during 2011.

ZRA - 117 – Greg Fox, Councilperson and Mary Kay Sigaty, Councilperson

Zoning Regulation Amendment to Section 128.A.4 (Supplementary Zoning District Regulations) to allow apiaries to be located within the current 200 foot setback on residential lots under certain conditions; to create a new Section 128.M to permit apiaries as an accessory use and to allow apiaries to be located in the NT and MXD districts.

ZRA 121 – 10071 WBO LLC c/o Patriot Realty

Zoning Regulation Amendments to permit increased residential density on certain CAC zoned parcels and to allow the Director of the Department of Planning and Zoning to further reduce the minimum commercial space requirement under certain conditions.

ZRA-128 – Ralph Ballman

Zoning Regulation Amendment to amend the Enforcement provisions of Section 102: Violations, Enforcement, and Penalties by changing and clarifying the notification procedures and appeal rights for persons requesting an inspection of a suspected violation.

ZRA - 130 – Farm Wineries

To amend the RC (Rural Conservation) District regulations to add “Farm Winery – Class 1” as a permitted accessory use subject to certain permit provisions; to add “Farm Winery – Class 1” and “Farm Winery – Class 2” as Conditional Use categories that are permitted on Preservation Parcels.

To amend the Supplementary Zoning District Regulations to establish the criteria and permit requirements for a “Farm Winery – Class 1” use as an accessory use to farming uses in the RC and RR Districts.

To establish the specific criteria for a “Farm Winery – Class 1” use as a Conditional Use on parcels including a Preservation Parcel less than 10 acres in the RC District, and to establish the specific criteria for a “Farm Winery – Class 2” use as a Conditional Use on parcels that are 25 acres or greater in the RC and RR Districts.

ZRA-131 – Funeral Home Parking

To amend the Zoning Regulations to establish an alternate method for calculating the minimum requirement for off-street parking for funeral homes; and generally relating to off-street parking for funeral homes.

ZRA-134 – Zoning Variances

To amend the Zoning Regulations to establish a new provision whereby approved variances would be exempt from the potential to become void for projects for which development plans are being actively processed in the Department of Planning and Zoning.

Zoning Map Amendments

The following highlights all zoning map amendments including the amendment number, name, and description that were approved in Howard County during 2011. Map 1 shows the location of each.

ZB 1083M – Stephen Klein and Cathy Klein

To rezone 6.33 acres located on the south side of MD 108 approximately 150 feet southwest of Sheppard Lane at 12161 and 12171 Clarksville Pike from R-20 to B-1.

ZB 1090M – Normandy Venture Limited Partnership

To rezone 24.43 acres located on the north side of US 40 approximately 1,230 feet northeast of Rogers Avenue, and also the east side of Rogers Avenue approximately 1,120 feet northeast of US 40, at 8450 and 8480 Baltimore National Pike, 8488 and 8492 Baltimore National Pike, and 3095 Rogers Avenue from B-2 to B-2-TNC.

ZB 1091M – Trotter 5857, LLC

To rezone 1.01 acres located on the east side of Trotter Road approximately one mile south of the intersection with MD 108 at 5857 Trotter Road from NT to R-20.

ZB 1092M – Jesse Tubb

To rezone 4,266 square feet located 433 feet east of US 1, approximately 530 feet north of Gatewood Drive at 8283 Washington Boulevard from CE-CLI to R-MH.

ZB 1093M – 3330 Rogers Avenue LLC

Approval of a Preliminary Development Plan and Criteria for a MXD-6 Mixed Use Development on a POR-MXD-6 zoned, 26.41 acre property located on the west side of Rogers Avenue approximately 400 feet southeast of US 40, and also at the terminus of Ellicott Center Drive approximately 650 feet northeast of Ridge Road, at 3330 Rogers Avenue and 3355 Ellicott Center Drive.

Subdivision & Land Development Regulation Amendments

The following highlights the Subdivision and Land Development Regulation amendments that were adopted in Howard County during 2011.

CB-6-2011 – Pre-Submission Community Meeting Requirements

Subtitle 1, Section 16.128 was amended to revise the requirements for pre-submission community meetings to require the distribution of DPZ prepared handout materials that provide an explanation of the development plan review process and the DPZ web page address at the community meeting. Additionally, the developer must provide a written response to all unanswered questions and send the response to all meeting attendees within 60 days of the community meeting, either electronically or by first class mail. At the discretion of the DPZ Director, if plans are submitted that are significantly different from what was presented at the pre-submission community meeting, another pre-submission community meeting may be required, unless the changes are in response to community input.

CB-46-2011 – Technical Correction to APFO Open School Definitions

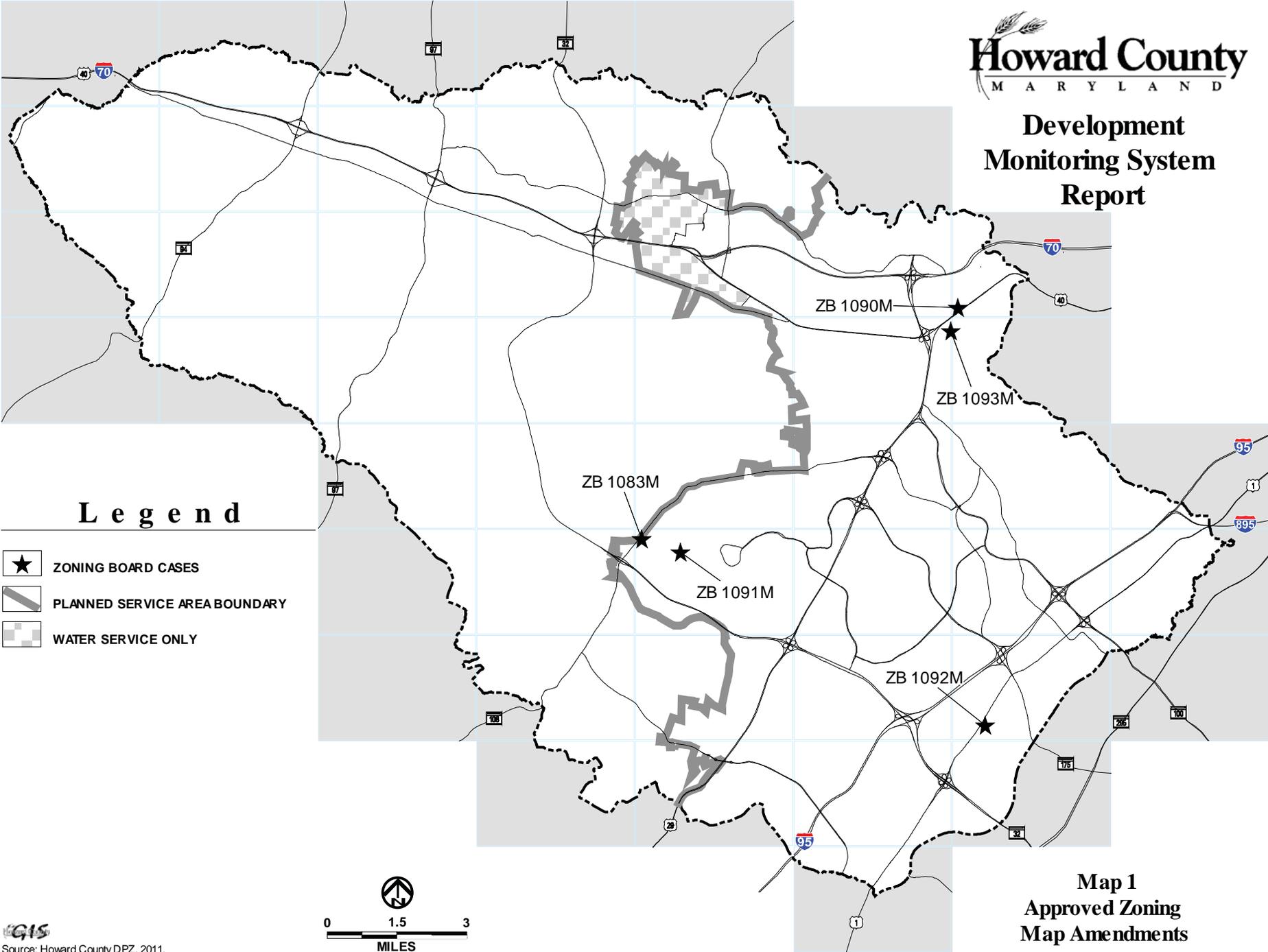
Subtitle 11, Section 16.1110(y) was amended to correct the definition for open school region, elementary school and middle school to indicate that “open” means the projected enrollment is 115 percent of the program capacity of the school region or school.

CB-47-2011 – Stormwater Management Regulations

An Act pursuant to the Stormwater Management Act of 2007, amending certain stormwater management regulations in the Howard County Code, amending certain definitions, defining certain terms, referring to various stages instead of plans, removing certain alternative compliance, clarifying certain waiver provisions and allowing alternative measures instead of alternative compliance, providing that the Howard County Design Manual shall contain certain provisions, making certain technical corrections, and generally relating to stormwater management requirements in Howard County.



Development Monitoring System Report



Legend

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



Map 1
Approved Zoning
Map Amendments

Source: Howard County DPZ, 2011.

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2011, 2.08 miles of new or extended roadway were constructed in Howard County. All of these additions were built in 13 new subdivisions as part of developer's agreements executed with the County. A total of 0.32 miles of roadway was abandoned in 2011, a cul-de-sac on Sterling Drive per Council Resolution 113-11. There were no roads built through the County's capital project process. Detailed information about all roadway construction projects is documented in Howard County's 2010 annual report to the State Highway Administration. These roads are shown on Map 2.

Other Transportation Facilities

Howard County continued its aggressive efforts to replace buses, install new shelters, improve pedestrian access to bus stops and develop a central maintenance facility. In 2011, three new fixed route low-floor heavy duty hybrid buses were placed into service and an additional three medium duty hybrid buses were ordered. Seven bus shelters were rehabbed or replaced, including expanding the Howard Transit hub with new shelters and pads.

There are a number of new bus shelter projects underway, including the installation of new upgraded fixtures. These projects, once completed, will be reported in future reports. The pace of development for the Central Maryland Transit Operations Facility continues to quicken as a space allocation plan has been developed and the construction plan will be finalized in 2012, for a forecasted opening in the summer of 2013.

New Schools, School Renovations and Additions to Schools

The Howard County Public School system completed seven renovation and/or addition projects in the 2011 calendar year. Most all of the renovation and expansion efforts have been within the priority funding area. Only one project was outside the priority funding area, and this project only renovated a mechanical system so it did not increase the floor area of the facility. Projects which increase school capacity support smart growth goals by positioning infrastructure to serve growth within the priority funding area.

Bellows Spring Elementary School

This 13,000 sq. ft. addition to Bellows Spring ES has increased the capacity of the school from 662 to 762 seats. In addition to classroom capacity, core areas were expanded to improve the function of the school with a larger enrollment. Mechanical systems were replaced, making the facility more energy efficient. The school system will maintain seven relocatable classrooms there until ES #41 is completed and opened in August 2013.

Hammond Elementary School & Hammond Middle School

In the southeastern region the school system completed a renovation/addition to the building which contains both Hammond ES and Hammond MS. The approximately 7,000 square foot addition increased the ES capacity to 597. During the renovation, the addition created swing space for the school allowing a year-round renovation schedule which was less expensive. This project is a part of an overall strategy to utilize existing capacity through redistricting and building additions to existing schools where feasible. In 2011, the school system enacted a major elementary redistricting which utilized capacity at Fulton ES, Pointers Run ES, and Dayton Oaks ES to provide some relief to southeastern schools.

Northfield Elementary School

Northfield ES serves the northern region which includes Ellicott City. First opened in 1968, this school was in need of renovation and expansion. The project added six classrooms, as well as new space for related arts and core facilities. The capacity of the school was increased from 522 to 671. Existing space was completely renovated improving administrative function and repartitioning the "open concept" spaces to create self-contained classrooms. The project included environmental design concepts.

Centennial High School & Hammond High School Dance Studios

Centennial HS and Hammond HS share the same building floor plan. Neither school had space dedicated exclusively to their dance programs. Both schools made do by scheduling time on the auditorium stage and utilizing corridors or other impromptu spaces when the stage was not available. This created disturbances for the dance program as well as surrounding instructional spaces and forced dance activities into spaces without finishes

or equipment designed for dance. Dance classroom additions of approximately 2,000 square feet were added to both schools. These projects put all twelve high schools in compliance with state curriculum requirements.

Mount Hebron High School Renovation

This project positioned the school system to serve the Ellicott City area with a newly renovated high school and did not require a temporary school during construction. The school continued to operate during the 30 month renovation and many of the logistics of this renovation are being applied to the Atholton HS renovation. The project also finished well under budget. Demolition of the old English wing area allowed for construction of a new 55,000 square foot addition in its place. Significant program space improvements were made in all academic areas. Basic core improvements upgraded the facility's wiring, plumbing, and mechanical systems. Interior and exterior circulation has been improved. The resulting facility has significantly improved indoor air quality, energy efficiency, building safety and learning environments.

Other Community Facilities and Infrastructure

There were several other major community facilities and infrastructure completed in 2011. For the county's water and sewer system the following were built: 1) the Fulton elevated water pumping station (off of Route 216) was placed in operating, 2) the Maple Lawn Farms water pumping station, which serves the Fulton tank, was placed in operation, 3) denitrification facilities at the Little Patuxent Water Reclamation Plant were completed and are now in operation, and 4) several more sections of the Little Patuxent parallel sewerage interceptor were completed.

Other major projects that were completed in 2011 include: 1) the renovation of the Howard County Government campus in Ellicott City, 2) the North Laurel Community Center, 3) the Robinson Nature Center, 4) the new Miller Library, and 5) a new 5 story parking garage at the Howard County Community College.

Consistency

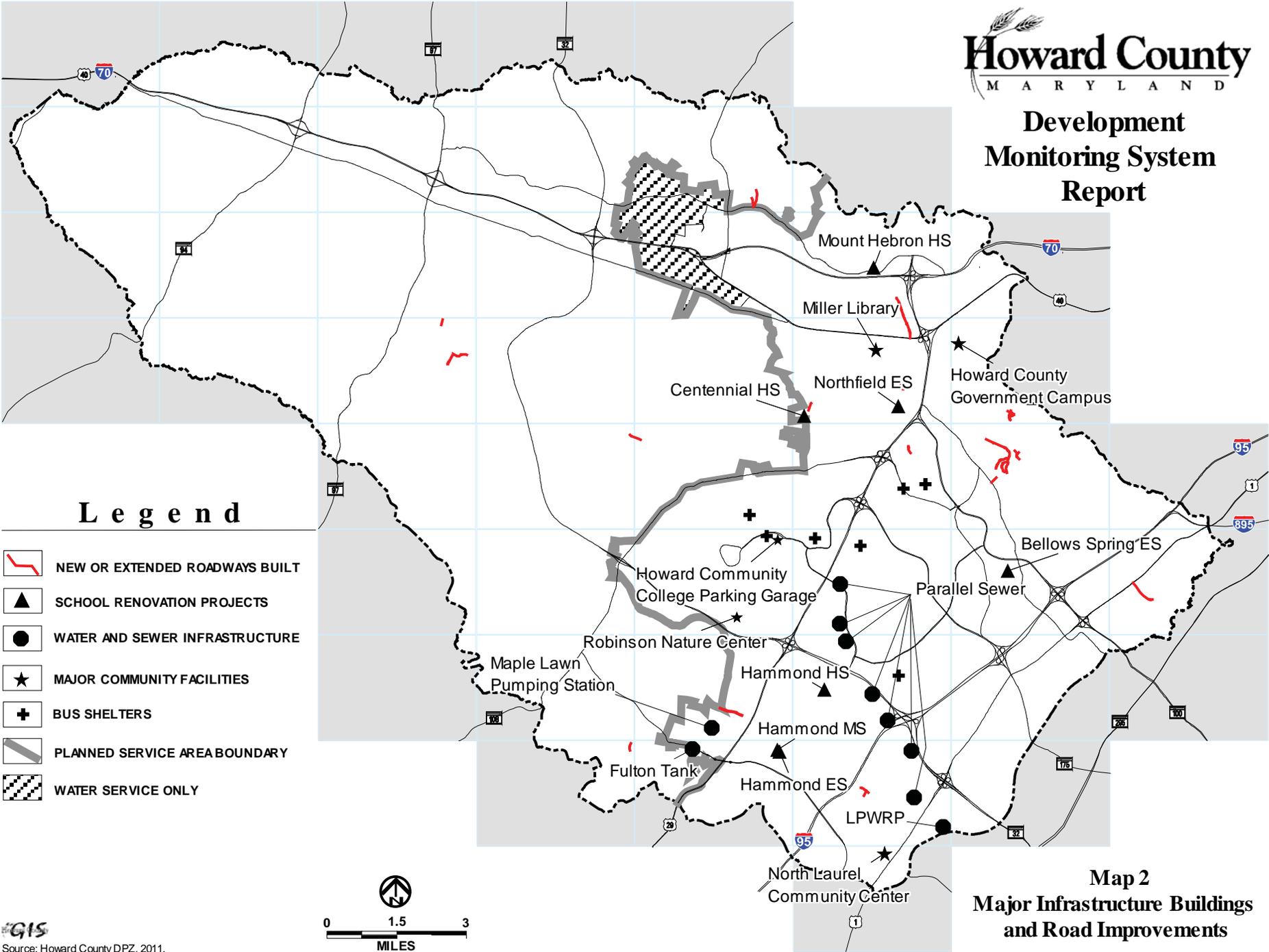
The Smart, Green and Growing Legislation requires that development patterns and infrastructure improvements that have occurred over the last year be evaluated for consistency with adopted local plans. An evaluation of whether these changes are consistent with each other as well as the adopted plans of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

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

Howard County's growth policy is to concentrate higher density development in the eastern portion of the county while preserving the Rural West. The development patterns and regulatory initiatives summarized in this report continue to support this goal. For example, all the major community facilities and school projects that have been completed in 2011 are located within the Priority Funding Area. Furthermore, with the adoption of the Downtown Columbia Design Guidelines further progress has been achieved on establishing the implementing structure for the revitalization of Downtown Columbia, which will be transformed into a higher density mixed-use community over the next several decades.



Development Monitoring System Report



Legend

- NEW OR EXTENDED ROADWAYS BUILT
- SCHOOL RENOVATION PROJECTS
- WATER AND SEWER INFRASTRUCTURE
- MAJOR COMMUNITY FACILITIES
- BUS SHELTERS
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Map 2
Major Infrastructure Buildings and Road Improvements

GIS
Source: Howard County DPZ, 2011.



APFO Restrictions

The Smart Green and Growing law of 2009 requires that each locality report and explain APFO restrictions that are within the Priority Funding Area. Starting July 1, 2010 local jurisdiction's first APFO reports were due to MDP, then every two years thereafter. Howard County DPZ first reported on this in 2010. This is the second 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 has been 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. Also part of APFO is the Open/Closed Schools Test, which limits construction in areas of the County facing school overcrowding, and the adequate roads test which determines necessary road improvements.

Allocation Restrictions in 2011

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

By the end of 2011, there were 18 residential subdivisions including 211 housing units delayed due to allocation limitations in the Elkridge Planning Area. The Elkridge area has seen relatively strong development activity over the last several years largely due to mixed-use redevelopment projects in the Route 1 corridor. This has resulted in projects being forced to wait until more allocations are made available each year.

The Allocations chart, which must be approved by the County Council, is typically adopted each July. However, during this last year its adoption was delayed from July 2011 to February 2012 given the Howard County Public School System was in the process of acquiring two school sites. These sites (one for a middle school and one for an elementary school), both in the Elkridge area, were successfully acquired by early 2012 and the chart was subsequently passed (CR-174-2011). As a result, 15 of the 18 projects totalling 174 housing units were allowed to proceed with plan processing.

Closed School Restrictions

After a development project receives allocations, it takes what is called the Open/Closed Schools Test. To pass this test the elementary school district, the elementary school region, and the middle school district where the project is located all must be under 115% capacity. Howard County has 40 elementary schools and 18 middle schools, each in their own district. The elementary schools are divided up into six elementary school regions.

In 2011 there were 5 closed elementary school districts and 2 closed middle school districts. The closed elementary school districts included Bellows Springs, Elkridge and Waterloo in the Northeast region and Forest Ridge and Gorman Crossing in the Southeast region. The closed middle school districts included Elkridge Landing and Ellicott Mills. There were a total of 9 projects including 1,355 housing units on hold due to these closures.

As a result of the additional school sites acquired by the School System as indicated above, a new Open/Closed School chart was adopted in February, 2012. With the adoption of this chart (CR-175-2011), and the associated redistricting approved by the School Board in November, 2011 all 9 projects were allowed to proceed with processing.

Net Density of Growth

The information provided in the subsequent sections of this report include details on the amount, type and location of development in Howard County in 2011. Progress on land preservation is also reported on. The Smart, Green and Growing legislation now requires all jurisdictions in Maryland to report on net density of growth both inside outside priority funding areas (PFA).

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

Net Density by Planning Area

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

The greatest average net density occurred in the Southeast at 19.66 units per acre based on 442 units built. This was followed by Elkridge at 18.26 units per acre, and then Ellicott City at 13.56 units per acre. Columbia saw an average net density of 12.08 units per acre for projects completed in 2011. The Rural West, as expected, had the lowest average net density at 0.89 units per acre. This is shown graphically in Chart 5.

Net Density Inside Versus Outside PFA

Table 2 shows the net 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 net density of 16.27 units per acre. This compares to a much smaller net density of 0.89 units per acre outside the PFA.

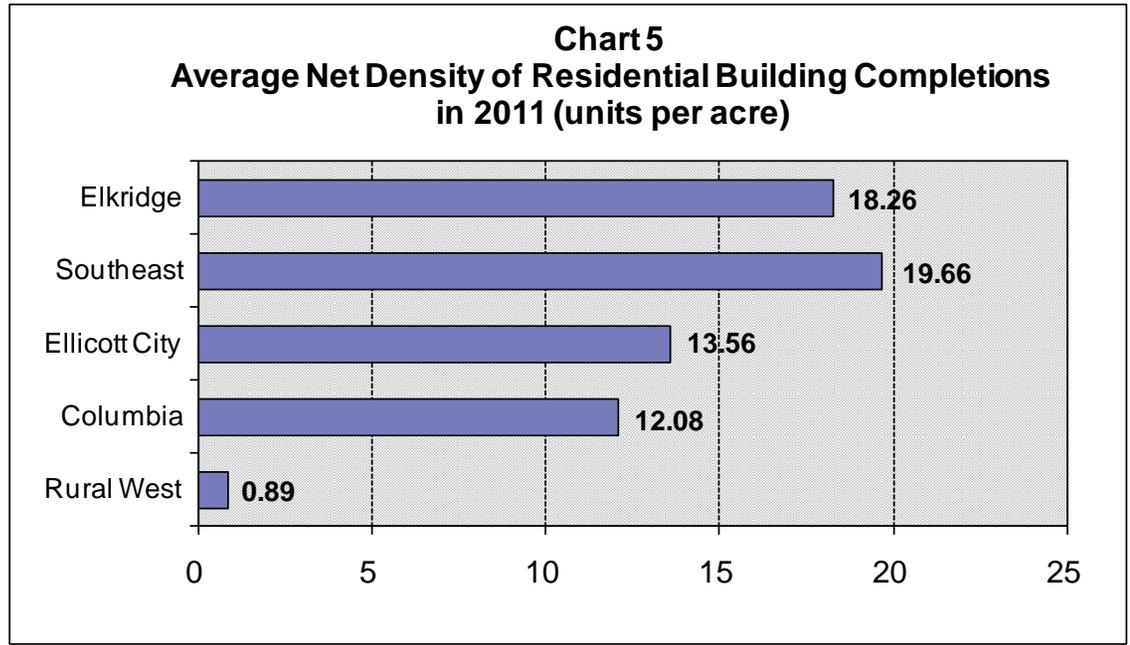
Map 3 shows the location of the completed units and also the relative densities. The map includes the PFA line. It is clear from the map that greater densities are being achieved inside the PFA.

Table 1
Density of Units Built in 2011 - By Planning Area

Planning Area	Units		Total Net Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Columbia	250	16%	25	4%	12.08
Elkridge	266	17%	36	6%	18.26
Ellicott City	364	24%	63	10%	13.56
Rural West	203	13%	489	75%	0.89
Southeast	442	29%	39	6%	19.66
TOTAL	1,525	100%	652	100%	14.22

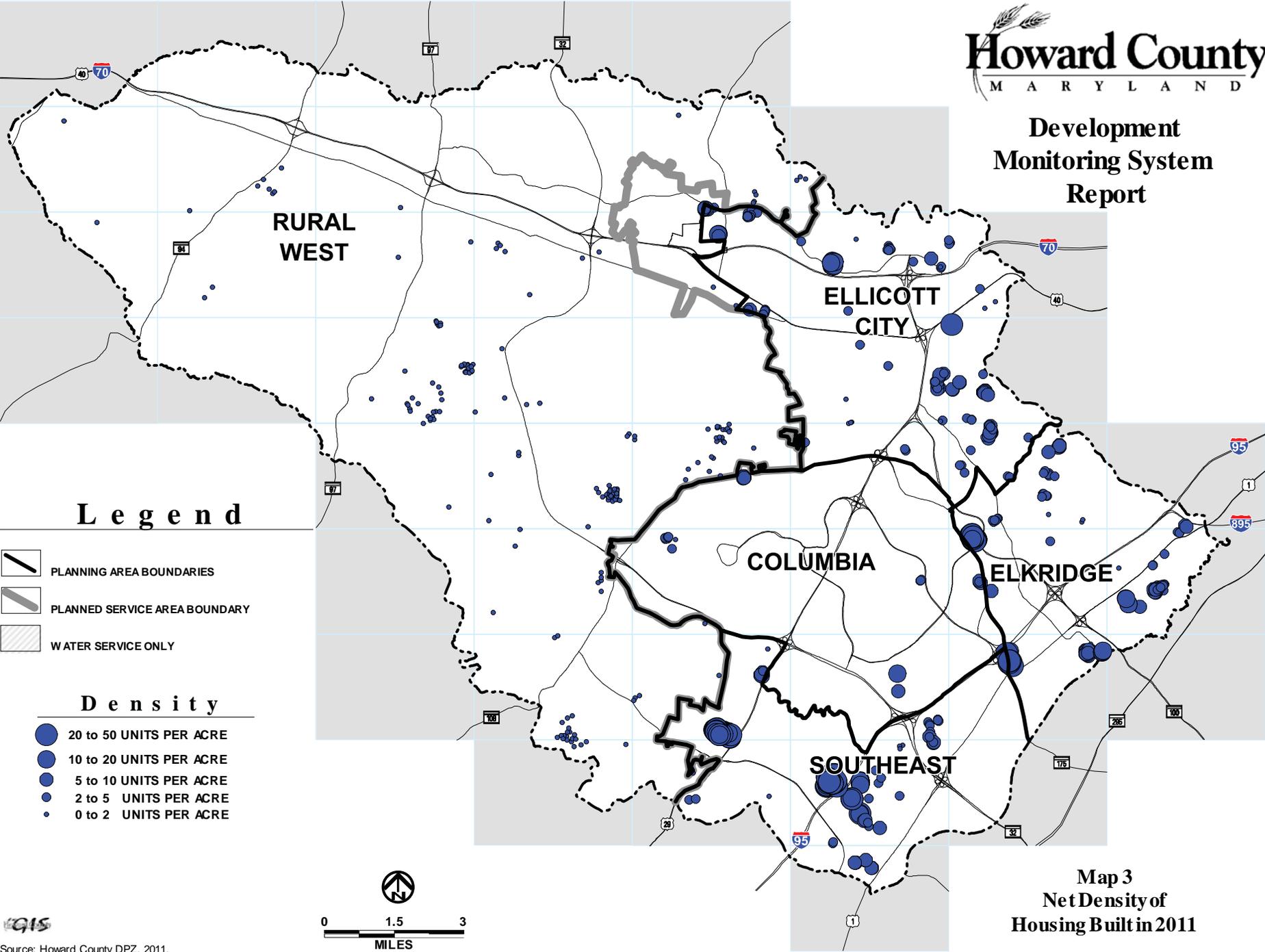
Table 2
Density of Total Units Built in 2011- Inside vs. Outside PFA

Planning Area	Units		Net Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,322	87%	163	25%	16.27
Outside PFA	203	13%	489	75%	0.89
TOTAL	1,525	100%	652	100%	14.22





Development Monitoring System Report



Legend

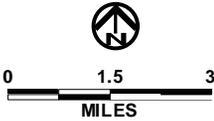
- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Density

- 20 to 50 UNITS PER ACRE
- 10 to 20 UNITS PER ACRE
- 5 to 10 UNITS PER ACRE
- 2 to 5 UNITS PER ACRE
- 0 to 2 UNITS PER ACRE



Source: Howard County DPZ, 2011.



Map 3
Net Density of
Housing Built in 2011

Local Growth Goal

The Smart, Green and Growing legislation stipulates that the statewide land use goal is to increase the current percentage of growth located within the Priority Funding Areas and to decrease their percentage of growth located outside the Priority Funding Areas (PFA). To achieve this, 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 adopted General Plan. Howard County's current General 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.

APFO was recently amended to reduce the annual number of housing unit allocations outside the priority funding area to 150 per year from the original 250 per year. These 100 units were re-allocated as part of a new "green neighborhood" allocation pool reserved for units inside the priority funding area. To receive green neighborhood allocations, the project must meet both site and building design criteria for environmental sustainability. This policy change therefore not only reduces the annual number of units built outside the PFA, but also enables more sustainable development within the PFA.

The General Plan was also recently amended in 2010 to allow additional units to Downtown Columbia as part of the Downtown Master Plan. The APFO housing unit allocation chart, adopted annually by the County Council, reflects all General Plan amendments.

Table 3 summarizes the growth based on current General Plan policy to the year 2020 over the next 9 years. A total of 1,350 units are allocated to areas outside the PFA, representing only 7.7% of all units countywide. The remaining 92.3% of units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2011 unit counts, 12.6% of all housing units in the County are outside the PFA. The remaining 87.4% are inside the PFA. This is summarized in Table 4.

Comparing this to the current General Plan policy of allocating only 7.7% of future units to areas outside the PFA it is clear that progress towards the goal of decreasing the percentage of growth outside the PFA is being met. Table 5 below shows total units built and allocated by 2020. The percentage of total units outside the PFA will decrease.

Table 3
Howard County General Plan Growth
(2012 to 2020 - Including GP Amendments)

Inside PFA	16,096	92.3%
Outside PFA	1,350	7.7%
Total	17,446	100.0%

Table 4
Total Built Units in Howard County
September 30, 2011

Inside PFA	94,964	87.4%
Outside PFA	13,685	12.6%
Total	108,649	100.0%

Table 5
Total Units by 2020 based on GP Policy

Inside PFA	111,060	88.1%
Outside PFA	15,035	11.9%
Total	126,095	100.0%

Resources to Achieve Goal

Besides the County's APFO described above that regulates the timing and location of growth, the Agricultural Land Preservation Program, described in detail beginning on Page 50 of this report, also helps reduce development capacity outside of the PFA while preserving land. The County's rural zoning is an additional mechanism preserving environmental or agricultural easements in place of housing units through a density transfer mechanism. The General Plan has a clear goal of preserving land outside of the PFA and much progress has been made over the last several decades.

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

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

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 were recorded or in existence prior to 2006, 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 General Plan 2000 Policies Map on Page 6.

Summary of Latest Reporting Period

For the latest reporting period from January 1, 2011 through December 31, 2011, there was potential for 656 housing units from recorded lots countywide in 88 subdivision plans totaling 2,347 acres (Table 6). ElkrIDGE had the most with 278 units, 42% of the total. The Southeast had potential for 147 units, 13% of the total. There were 129 units in recorded subdivision plans in Ellicott City (20%). The Rural West had 82 units (22%) and Columbia had 20 units (3%). These represent net new unit potential

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

Of the total 2,347 acres recorded, 1,396 acres, or about 59%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity. A significant amount was for plats sending or receiving density as part of the density and cluster exchange subdivision process. Also, the recorded acres for all areas include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

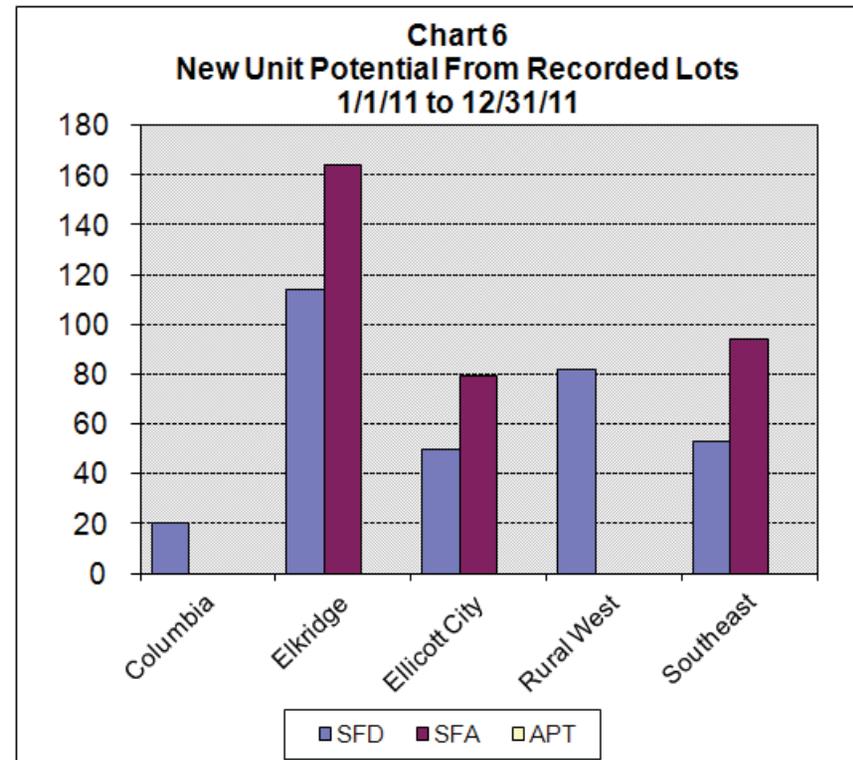
Table 7 shows new units from recorded lots by unit type. Of the 656 units from recorded lots, 319 are for single family detached units (SFD) and 337 are for single family attached or townhouse units (SFA). This represents 49% and 51% of the total units, respectively. Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions, 1/01/11 to 12/31/2011

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	20	3%	10	11%	36	2%
Elkridge	278	42%	25	28%	397	17%
Ellicott City	129	20%	12	14%	465	20%
Rural West	82	13%	28	32%	1,396	59%
Southeast	147	22%	13	15%	52	2%
TOTAL	656	100%	88	100%	2,347	100%

Table 7
Unit Potential from Recorded Lots by Unit Type, 1/01/11 to 12/31/2011

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	20	0	0	0	20	3%
Elkridge	114	164	0	0	278	42%
Ellicott City	50	79	0	0	129	20%
Rural West	82	0	0	0	82	13%
Southeast	53	94	0	0	147	22%
TOTAL	319	337	0	0	656	100%
PERCENT	49%	51%	0%	0%	100%	



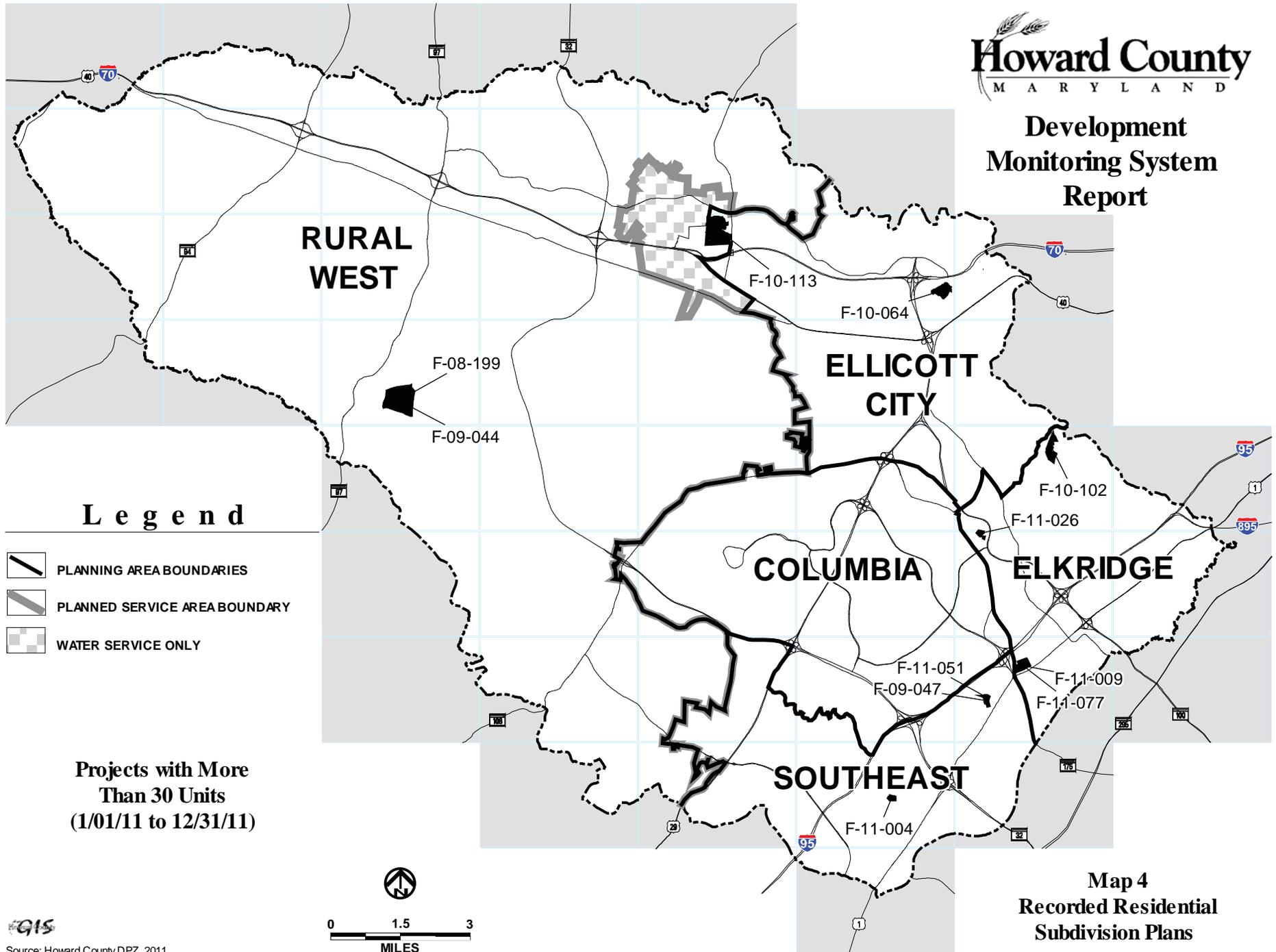
Last Year's Projects - Greater than 30 Units

Of the total 656 units from lots recorded for the latest reporting period, 433 or about 66% were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 8, are located in four of the five planning areas. The precise location of these plans are shown on Map 4.

These larger plans include Howard Square, Locust Chapel and Shipley's Grant in Elkridge, Rockland at Rogers and Courtyards at Waverly in Ellicott City, Gabriel's Courtyard and Riverwalk in the Southeast, and Meriwether Farm in the Rural West.



Development Monitoring System Report



Source: Howard County DPZ, 2011.

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 1/01/11 to 12/31/11

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-11-009	Howard Square	SFA & MIHU SFA	57	164
	F-11-077	Howard Square	SFA	56	
	F-10-102	Locust Chapel	SFD	64	
	F-11-026	Shipley's Grant - Phase 6	SFA & MIHU SFA	51	
Ellicott City	F-10-064	Rockland at Rogers	SFA & SFD	67	127
	F-10-113	Courtyards at Waverly - Phase 1 & 2	Age Restricted SFA & SFD	60	
Southeast	F-09-047, F-11-051	Gabriel's Courtyard	SFD & SFA	40	96
	F-11-004	Riverwalk	SFA & MIHU SFA	56	
Rural West	F-09-044, F-08-199	Meriwether Farm	SFD	46	46
TOTAL					433

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in October 1, 2006. (Note there is an extra quarter included due to the change in the analysis timeframe.) Over this time period lots for 6,222 units countywide in 693 subdivision plans totaling 19,741 acres were recorded. This equates to an annual average of 1,185 units per year.

Note that the acreage figure represents all acreage on recorded plats including resubdivisions, sending and receiving preservation parcels, and recordations that do not add any new units such as recording for the pur-

pose 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 2,156 single family detached units, 35% of the total 6,222. A total of 1,803, 29%, were for single family attached units and the remaining 2,263, 36%, were for apartments units. (As indicated earlier, these represent net new unit potential from recordations and do not include totals from resubdivisions.)

Table 9
Recorded Residential Subdivisions, 10/01/06 to 12/31/11

Year	Units	Plans	Acreage
10/06 to 9/07	2,145	198	6,054
10/07 to 9/08	1,873	165	6,869
10/08 to 9/09	569	116	2,678
10/09 to 12/10 *	979	126	1,793
1/11 to 12/11	656	88	2,347
TOTAL	6,222	693	19,741
ANNUAL AVG.	1,185	132	3,760

* Extra quarter included due to change in analysis timeframe

Table 10
Unit Potential From Recorded Lots by Unit Type, 10/01/06 to 12/31/11

Year	SFD	SFA	APT	MH	Total
10/06 to 9/07	671	533	941	0	2,145
10/07 to 9/08	555	290	1,028	0	1,873
10/08 to 9/09	249	243	77	0	569
10/09 to 12/10 *	362	400	217	0	979
1/11 to 12/11	319	337	0	0	656
TOTAL	2,156	1,803	2,263	0	6,222
PERCENT	35%	29%	36%	0%	100%
ANNUAL AVG.	411	343	431	0	1,185

* Extra quarter included due to change in analysis timeframe

In-Process Residential Subdivisions

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

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

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in several stages (environmental concept, sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of December 31, 2011 are tabulated and compared with those in process the prior year (as of December 31, 2010).

Number of Plans

Two less residential plans were in process as of December 31, 2011 than there were one year earlier – 188 plans in 2010 compared to 190 plans in 2010 (Table 11).

For the current year, the Rural West had the greatest number of residential plans in process with 60, followed by Ellicott City with 46. Elkridge and the Southeast had 44 and 27 plans in process, respectively. Columbia had 11 plans in process.

Of the 188 plans in process on December 31, 2011, 138 were final plans, 11 were environmental concept plans, 17 were sketch plans, 21 were preliminary equivalent sketch plans and 1 was a preliminary plan.

Number of Potential Units

There were slightly less units in process on December 31, 2011 compared to the previous year – 8,018 units compared to 8,108 units (Table 12).

It is important to note that a significant number of the 8,018 potential units in process are part of phased projects with building planned for future

Table 11
Number of Residential Subdivision Plans in Process, 12/31/11
(With comparisons to Countywide total as of 12/31/10)

Planning Area	Environmental Concept	Preliminary Equivalent			Final	TOTAL PLANS
		Sketch	Sketch	Preliminary		
Columbia	1	0	1	0	9	11
Elkridge	2	8	8	0	26	44
Ellicott City	5	7	3	0	31	46
Rural West	1	0	8	0	51	60
Southeast	2	2	1	1	21	27
TOTAL	11	17	21	1	138	188
As of 12/31/10	12	12	24	2	140	190

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, 6,728 units are part of phased plans, with building planned as far out as 2020 (for Howard Square and The Overlook at Blue Stream). Phased plans represent 84% of the total units in process.

The larger phased projects include Maple Lawn Farms and Laurel Park Station in the Southeast; The Overlook at Blue Stream, Howard Square, Oxford Square and Morris Place in Elkridge; Turf Valley, Autumn River and the Courtyards in Ellicott City; and Simpson Mill in Columbia.

As reflected in Table 12, 21% of the units in process are single family detached units. About 23% are single family attached units and 55% are apartment units (condo or rental). Table 14 shows details by plan stage and unit type for this year by planning area. Chart 7 graphically illustrates the units in process by unit type for each planning area.

Table 12
Number of Potential Units from Subdivision Plans in Process, 12/31/11
 (With comparisons to Countywide total as of 12/31/10)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	32	150	112	0	294
Elkridge	260	730	2,766	0	3,756
Ellicott City	449	790	519	0	1,758
Rural West	418	0	0	0	418
Southeast	559	207	1,026	0	1,792
TOTAL	1,718	1,877	4,423	0	8,018
PERCENT	21%	23%	55%	0%	100%
As of 12/31/10	2,281	2,073	3,754	0	8,108

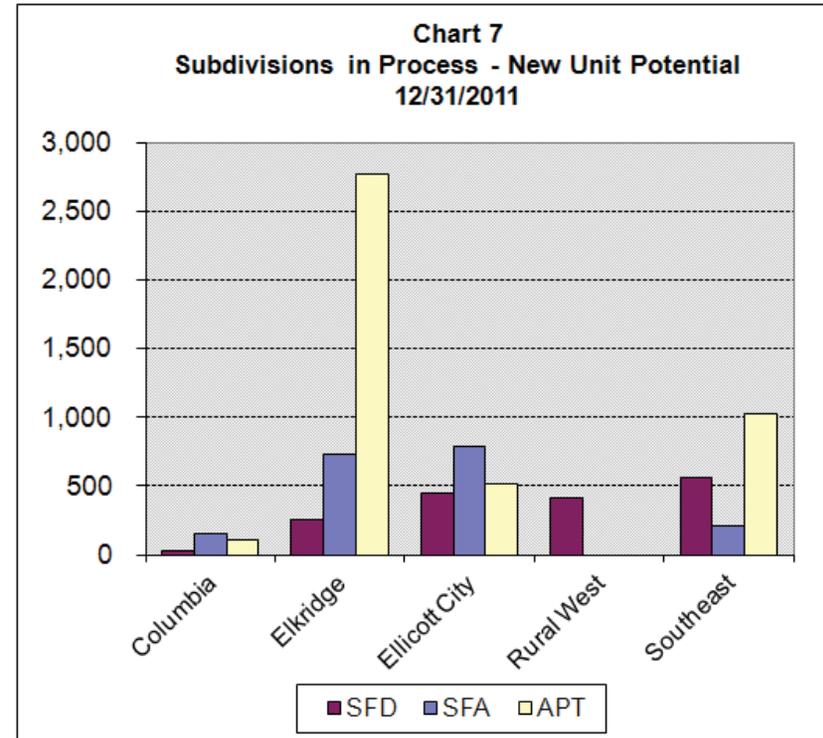


Table 13
Potential Units from Phased Projects

Planning Area	2012	2013	2014	2015	2016	2017	2018	2019	2020	TOTAL
Columbia	0	40	40	80	70	32	0	0	0	262
Elkridge	0	413	449	470	468	570	502	301	221	3,394
Ellicott City	234	252	153	153	197	200	200	0	0	1,389
Southeast	0	400	371	406	330	41	0	0	0	1,548
Rural West	0	0	45	0	45	0	45	0	0	135
TOTAL	234	1,105	1,058	1,109	1,110	843	747	301	221	6,728

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, 12/31/11

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	8	0	112	0	120
Elkridge	22	674	2,766	0	3,462	135	0	0	0	135
Ellicott City	261	522	328	0	1,111	11	9	0	0	20
Rural West	0	0	0	0	0	162	0	0	0	162
Southeast	235	91	774	0	1,100	170	49	0	0	219
TOTAL	518	1,287	3,868	0	5,673	486	58	112	0	656

Planning Area	Preliminary					Final					TOTAL - 12/31/11				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	24	150	0	0	174	32	150	112	0	294
Elkridge	0	0	0	0	0	103	56	0	0	159	260	730	2,766	0	3,756
Ellicott City	0	0	0	0	0	177	259	191	0	627	449	790	519	0	1,758
Rural West	0	0	0	0	0	256	0	0	0	256	418	0	0	0	418
Southeast	0	0	252	0	252	154	67	0	0	221	559	207	1,026	0	1,792
TOTAL	0	0	252	0	252	714	532	191	0	1,437	1,718	1,877	4,423	0	8,018

Number of Acres

As of December 31, 2011 a total of 4,515 acres of residential land were in the subdivision process. This is 1,364 acres less compared to the previous year, at which time there were 5,879 acres in process (Table 15).

Major Projects

Table 16 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive and phased projects. Map 5 shows the location of these projects. Some of the larger projects in this list include The Overlook at Blue Stream, Oxford Square, Howard Square, Turf Valley, The Courtyards at Waverly Woods West, Walnut Creek, Laurel Park Station, Maple Lawn Farms, and Wincopia Farms. These major projects include 7,236 units which account for about 90% of the total 8,018 units in the subdivision process.

Table 15
Acreege of Residential Subdivision Plans in Process, 12/31/11
(With comparisons to Countywide total as of 12/31/10)

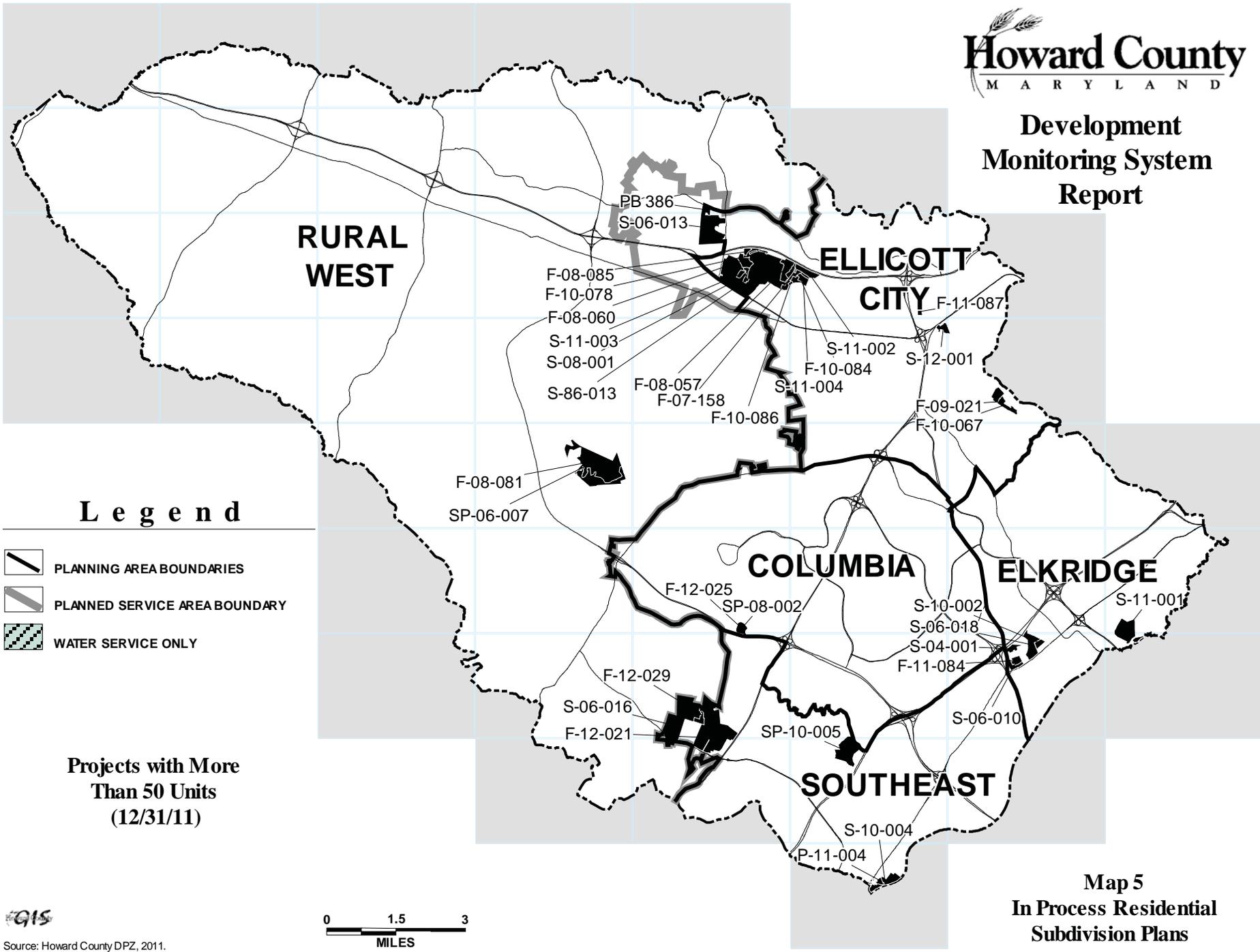
Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Columbia	0	37	0	50	87
Elkridge	312	111	0	252	675
Ellicott City	352	12	0	398	762
Rural West	0	704	0	1,829	2,534
Southeast	199	128	15	116	457
TOTAL	863	992	15	2,645	4,515
As of 12/31/10	792	1,060	85	3,942	5,879

**Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/11**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	F-12-025	Simpson Mill	SFA - 5 MIHU	150	262
	SP-08-002	Riverdale	APT - Age Restricted, 12 MIHU	112	
Elkridge	S-06-018	The Overlook at Blue Stream	SFA, APT - 202 MIHU	1,345	3,461
	S-11-001	Oxford Square	APT - 143 MIHU	954	
	S-06-010, F-11-084	Howard Square	SFA, APT - 226 MIHU	911	
	S-10-002	Morris Place	SFA - 28 MIHU	184	
	S-04-001	Village Towns	APT	67	
Ellicott City	S-86-013, PB 386	Turf Valley - Remaining Phases	SFD, SFA, APT	384	1,669
	S-06-013	The Courtyards at Waverly Woods West - Ph. 4 & 5	SFD, SFA - Age Restricted	190	
	F-08-060/F-08-085, -86/F-10-078	Villages at Turf Valley	SFD, SFA, APT	177	
	S-12-001	Ellicott Mills Overlook	SFA - 17 MIHU, APT - Age Restricted	168	
	S-08-001	Turf Valley Clubhouse	SFD, APT	128	
	F-11-087	Orchard Meadows	APT, 15 MIHU	122	
	S-11-002	The Bluffs at Turf Valley	APT	114	
	F-10-084/F-10-086/F-07-158	Fairways at Turf Valley	SFA	97	
	F-10-067/F-09-021	Autumn River	SFD, SFA	93	
	S-11-004	Turf Valley - Pod E	SFD, SFA	74	
	F-08-057	Vantage Condominiums at Turf Valley	APT	69	
S-11-003	Turf Valley Clubhouse II	SFD, SFA	53		
Rural West	SP-06-007/F-08-081	Walnut Creek - Phase 2 to 4	SFD	135	135
Southeast	S-10-004	Laurel Park Station - Phases 2 to 4	APT, 150 MIHU	748	1,709
	S-06-016	Maple Lawn Farms - Phases 9 to 12	SFD, SFA, APT	352	
	P-11-004	Laurel Park Station - Phase 1	APT	252	
	SP-10-005	Wincopia Farms	SFD, SFA	219	
	F-12-021, F-12-029	Maple Lawn Farms - Phase 8	SFD, SFA	138	
TOTAL					7,236



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Projects with More Than 50 Units (12/31/11)



Source: Howard County DPZ, 2011.



**Map 5
In Process Residential Subdivision Plans**

Approved Residential Site Development Plans

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

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

Summary of Latest Reporting Period

From 01/01/2011 thru 12/31/2011 there were 823 housing units approved in 42 site development plans totaling about 175 acres (Table 17). The Southeast had 308 approved units followed by Ellicott City with 280 units, Elkridge with 211 and Columbia with 24.

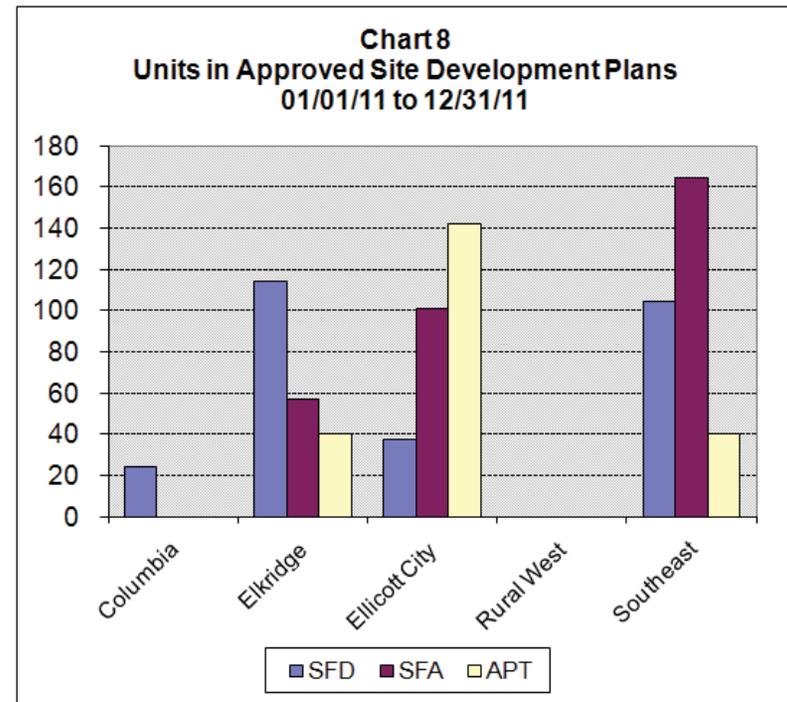
Table 18 shows new units from approved site development plans by unit type. Of the 823 approved units, 34% were for single family detached units, 39% were for single family attached or townhouse units and 27% for apartment units. Chart 8 shows these results graphically.

Table 17
Approved Residential Site Development Plans, 1/01/11 to 12/31/11

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	24	3%	8	19%	13	8%
Elkridge	211	26%	13	31%	62	35%
Ellicott City	280	34%	6	14%	51	29%
Rural West	0	0%	0	0%	0	0%
Southeast	308	37%	15	36%	48	28%
TOTAL	823	100%	42	100%	175	100%

Table 18
Approved Units from SDP's by Unit Type, 1/01/11 to 12/31/11

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	24	0	0	0	24	2.9%
Elkridge	114	57	40	0	211	25.6%
Ellicott City	37	101	142	0	280	34.0%
Rural West	0	0	0	0	0	0.0%
Southeast	104	164	40	0	308	37.4%
TOTAL	279	322	222	0	823	100.0%
PERCENT	34%	39%	27%	0%	100%	



Last Year's Projects - Greater than 30 Units

Of the total 823 units approved in site development plans last year, 693 or about 84% were in part of projects consisting of more than 30 units. These larger projects, shown in Table 19, are located in three planning areas. The location of these plans are shown on Map 6.

Five Year Results

Tables 20 and 21 show the approved residential site development plans from October 1, 2006 to December 31, 2011. Over this five and a quarter year period 6,644 units were approved countywide in 325 site development plans totaling about 1,325 acres.

The last reporting period saw a decrease in approved units compared to the previous period - 823 versus a 1,309 units approved.

Table 19
Approved Residential SDP's, Projects With More Than 30 Units, 1/01/11 to 12/31/11

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	SDP-11-042	Locust Chapel	SFD, SFA	64	161
	SDP-08-078	Howard Square	SFA - 15 MIHU	57	
	SDP-10-087	Shipleys Grant	APT	40	
Ellicott City	SDP-11-051	Hilltop Redevelopment	APT - 20 MIHU, SFA	104	268
	SDP-12-005	Rockland at Rogers	SFD, SFA	68	
	SDP-10-052	Taylor Way at Village Crest	Apt-Age Restricted, SFA-Age Restricted	58	
	SDP-10-036	Forest Green	APT	38	
Southeast	SDP-11-013/SDP-12-004	Maple Lawn Farms	SFD, SFA	98	264
	SDP-10-060	Riverwalk	SFA - 6 MIHU	56	
	SDP-10-050	Beechcrest Apartments	APT - 13 MIHU	40	
	SDP-11-024	Gabriel's Courtyard	SFA	37	
	SDP-10-086	Pleasant Chase	SFD	33	
TOTAL					693

Table 20
Approved Units in Residential Site Development Plans, 10/01/06 to 12/31/11

Year	SFD	SFA	APT	MH	Total
10/06 to 9/07	341	917	1,076	39	2,373
10/07 to 9/08	285	466	812	0	1,563
10/08 to 9/09	261	156	159	0	576
10/09 to 12/10 *	413	572	324	0	1,309
01/11 to 12/11	279	322	222	0	823
TOTAL	1,579	2,433	2,593	39	6,644
PERCENT	24%	37%	39%	1%	100%
ANNUAL AVG.	301	463	494	7	1,266

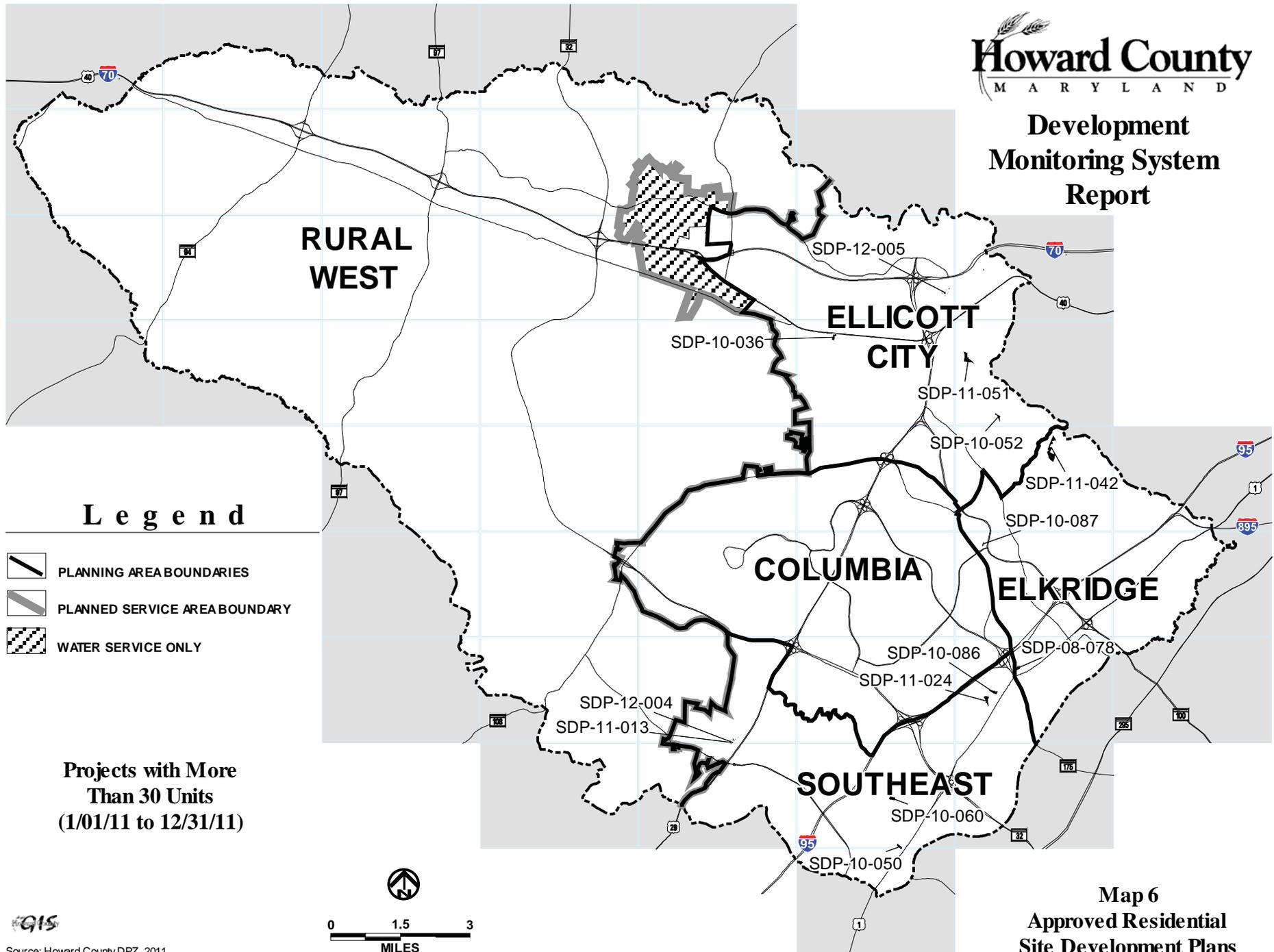
* Extra quarter included due to change in analysis timeframe

Table 21
Approved Residential Site Development Plans, 10/01/06 to 12/31/11

Year	Units	Plans	Acreage
10/06 to 9/07	2,373	92	371
10/07 to 9/08	1,563	72	192
10/08 to 9/09	576	47	154
10/09 to 12/10 *	1,309	72	433
01/11 to 12/11	823	42	175
TOTAL	6,644	325	1,325
ANNUAL AVG.	1,266	62	252

* Extra quarter included due to change in analysis timeframe

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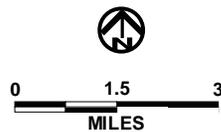
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**Projects with More
Than 30 Units
(1/01/11 to 12/31/11)**



Source: Howard County DPZ, 2011.



**Map 6
Approved Residential
Site Development Plans**

In-Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of plans, potential units and acreage currently being processed as of December 31, 2011 are tabulated and compared to those in process a year earlier (as of December 31, 2010). 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 more residential site development plans in process as of December 31, 2011 compared to the prior reporting period, 46 plans compared to 43 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 12/31/10 & 12/31/11

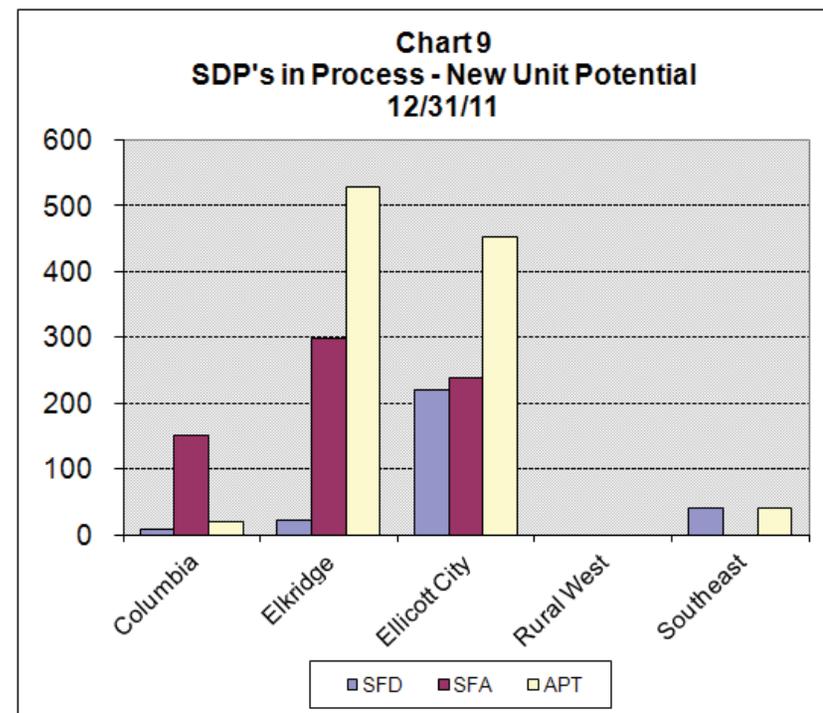
Planning Area	2011	2010
Columbia	6	5
Elkridge	14	14
Ellicott City	18	14
Rural West	0	0
Southeast	8	10
TOTAL	46	43

Number of Potential Units

There were significantly more units in process as of December 31, 2011 compared to December 31 of the previous year, 2,019 units compared to 1,412 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 1,042 proposed units in 2011. This is followed by 686 proposed single family attached or townhouse units and 291 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, 12/31/11
(With comparisons to Countywide total as of 12/31/10)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	9	150	20	0	179
Elkridge	23	297	529	0	849
Ellicott City	219	239	453	0	911
Rural West	0	0	0	0	0
Southeast	40	0	40	0	80
TOTAL	291	686	1,042	0	2,019
As of 12/31/10	183	592	637	0	1,412



Number of Acres

As of December 31, 2011 a total of 390 acres of residential land were in the site development plan process. This is more than the previous year when there were 355 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects containing 30 units or more. Map 7 shows the location of these projects. Of the 2,019 units in the site development plan process, 1,799 or about 89% were in projects with 30 units or more.

Table 24
Acres of Residential SDP's In Process, 12/31/11 & 12/31/10

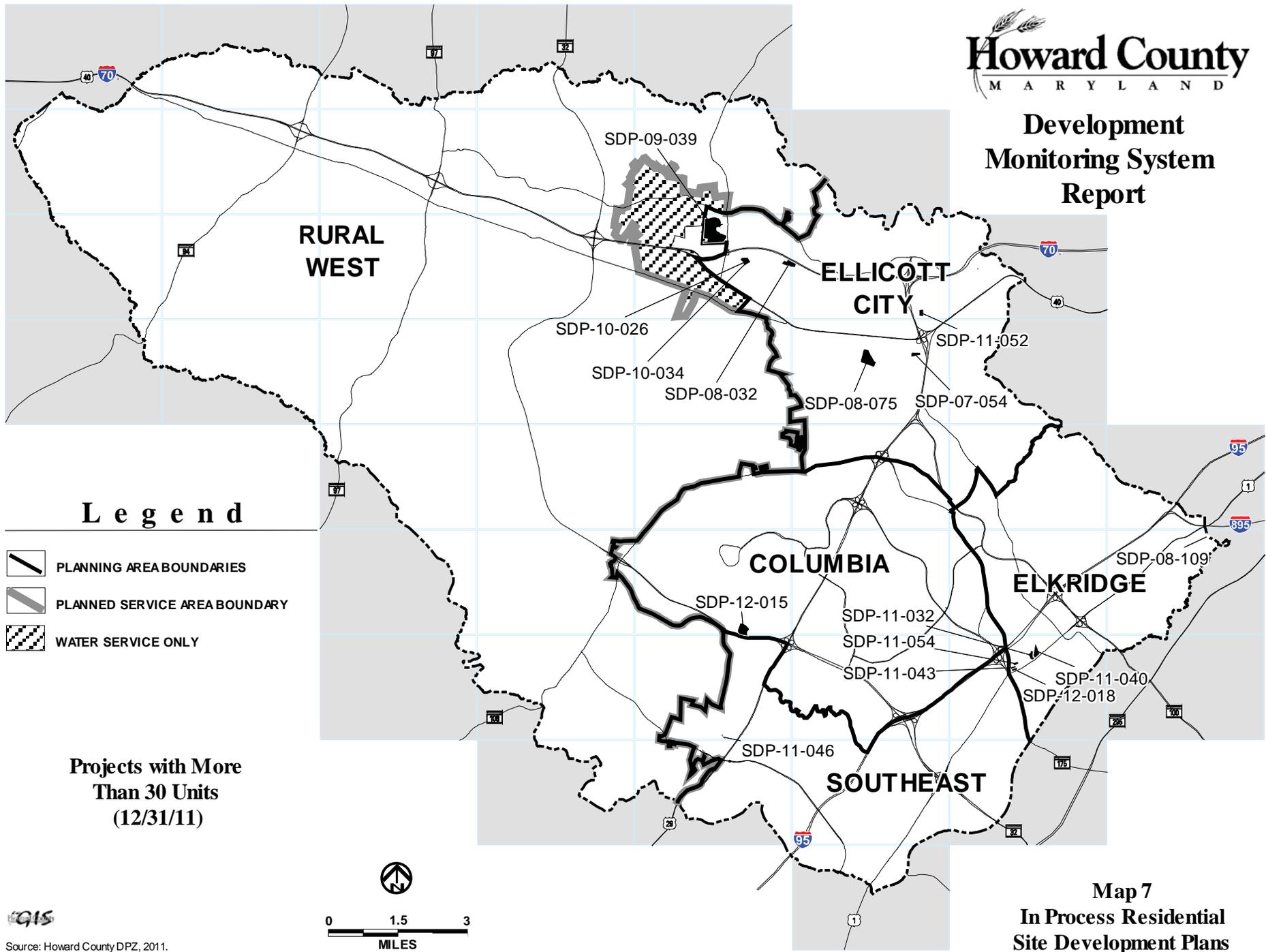
Planning Area	2011	2010
Columbia	38	14
Elkridge	87	43
Ellicott City	255	247
Rural West	0	0
Southeast	10	51
TOTAL	390	355

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/11

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-12-015	Simpson Mill	SFA - 5 MIHU	150	150
Elkridge	SDP-12-018	Howard Square	APT	256	794
	SDP-11-032	Grosvenor House (Blue Stream)	SFA, APT	254	
	SDP-11-040	Dorset Gardens (Blue Stream)	SFA - 24 MIHU	125	
	SDP-11-043	Howard Square	SFA - 14 MIHU	56	
	SDP-11-054	Howard Square	SFA - 14 MIHU	56	
	SDP-08-109	Riverwatch	APT - 12 MIHU	47	
Ellicott City	SDP-08-075	Lutheran Village at Millers Grant	SFA, APT - Age Restricted - 29 MIHU	284	815
	SDP-09-039	Waverly Woods - Courtyards West	SFD, SFA - Age Restricted	190	
	SDP-11-052	Orchard Meadows	APT - 15 MIHU	144	
	SDP-10-034/SDP-10-026	Villages at Turf Valley	SFA	86	
	SDP-08-032	Vantage Condominiums at Turf Valley	APT	60	
	SDP-07-054	Villas of Dunloggin	SFA - Age Restricted - 6 MIHU	51	
Southeast	SDP-11-046	Maple Lawn Farms	APT	40	40
TOTAL					1,799



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Projects with More Than 30 Units (12/31/11)



Source: Howard County DPZ, 2011.



**Map 7
In Process Residential Site Development Plans**

Residential Building Permits & Use and Occupancy Permits

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

Issued Building Permits

Summary of Latest Reporting Period

From January 1, 2011 to December 31, 2011, the County issued 1,172 residential building permits for new construction (Table 26). Ellicott City had the greatest number issued with 363, followed by the Southeast with 320 and then Elkridge with 269. Countywide, 45% of the permits were for single family units. About 39% were for townhouse units and 16% for apartment units. Chart 10 shows these results graphically by planning area.

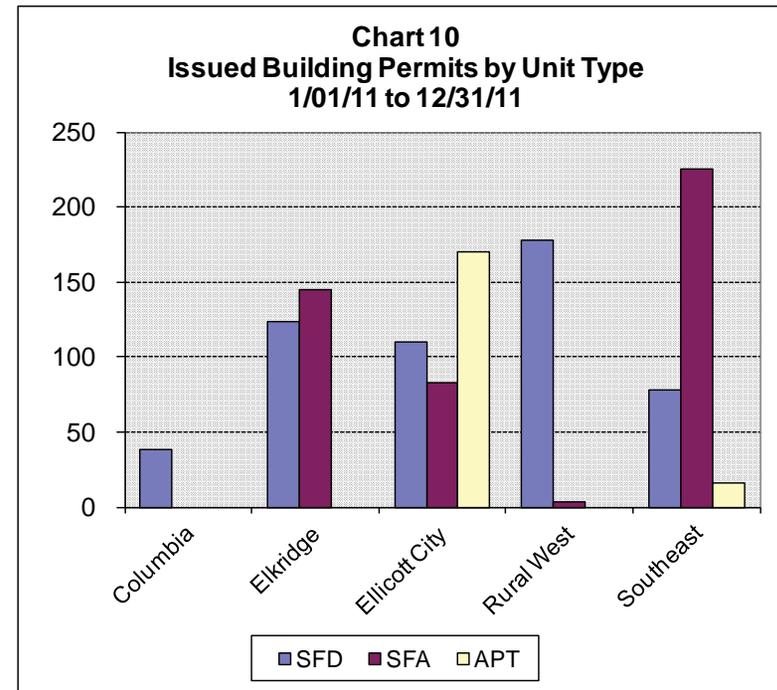


Table 26
Issued Residential Building Permits by Unit Type, 1/01/11 to 12/31/11

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	38	0	0	0	38	3%
Elkridge	124	145	0	0	269	23%
Ellicott City	110	83	170	0	363	31%
Rural West	178	3	0	1	182	16%
Southeast	78	225	16	1	320	27%
TOTAL	528	456	186	2	1,172	100%
PERCENT	45%	39%	16%	0%	100%	

Last Year's Projects - Greater than 20 Units

Table 27 summarizes the issued residential building permits in larger subdivisions with more than 20 units. About 58%, or 685 of the total 1,172 permits issued last year, fall into this category. Map 8 shows the locations of each of the subdivisions.

Five Year Results

Over five and a quarter years, from October 1, 2006 to December 31, 2011, a total of 7,298 residential permits have been issued in Howard County (Table 28). This is an average of 1,460 permits per year.

Of the 7,298 total permits issued over this time period, 2,292, or 31%, were for single family detached units. There were 2,468 permits (34%) for single family attached units and 2,478 permits (34%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

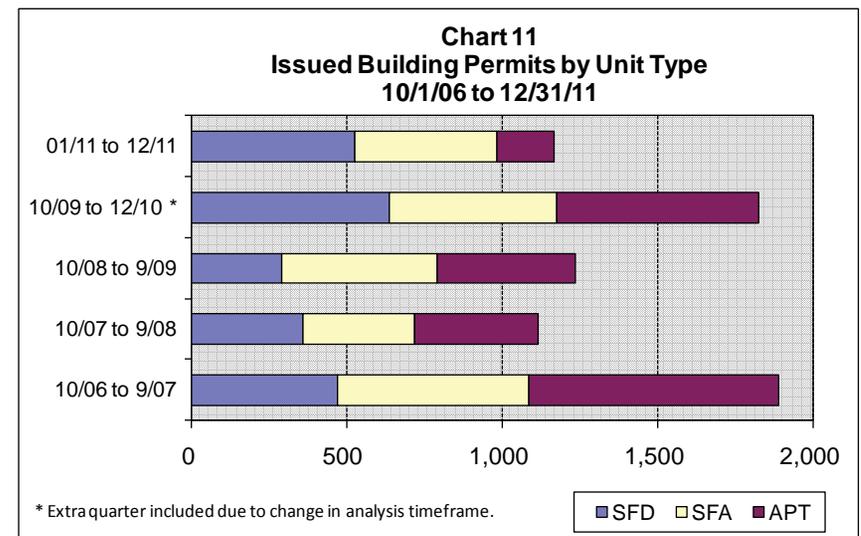
Table 27
Issued Residential Building Permits in
Subdivisions With More Than 20 Units, 1/01/11 to 12/31/11

Planning Area	Subdivision	Unit Type	Units	TOTAL
Elkridge	Elkridge Crossing	Townhomes	24	173
	Lennox Park	Single-Family Detached	28	
	Shipley's Grant	Townhomes	51	
	Howard Square	Townhomes	70	
Ellicott City	Enclave at Ellicott Station	Townhomes-Age Restricted	20	242
	GTW's Waverly Woods	Single-Family Detached/Townhomes-Age Restricted	24	
	Hilltop Redevelopment - Ph. 1	Townhomes/Apartments	198	
Rural West	Lime Kiln Valley	Single-Family Detached	20	53
	Walnut Grove	Single-Family Detached	33	
Southeast	Stone Lake	Single-Family Detached/Townhomes	20	217
	Emerson	Townhomes	97	
	Maple Lawn Farms	Single-Family Detached/Townhomes	100	
TOTAL				685

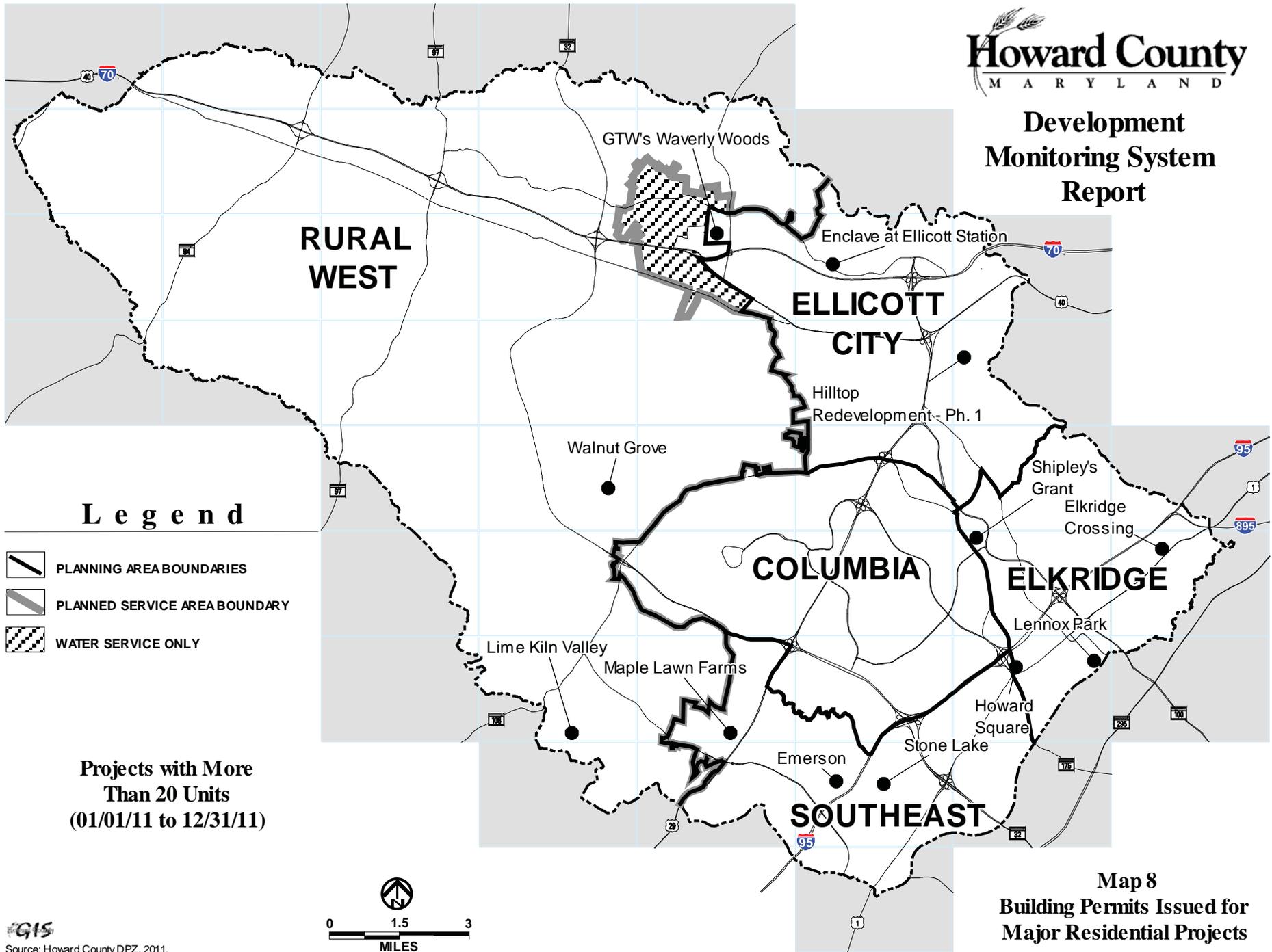
Table 28
Issued Residential Building Permits by Unit Type, 10/01/06 to 12/31/11

Year	SFD	SFA	APT	MH	Total
10/06 to 9/07	472	614	803	10	1,899
10/07 to 9/08	361	360	394	42	1,157
10/08 to 9/09	294	497	445	1	1,237
10/09 to 12/10 *	637	541	650	5	1,833
01/11 to 12/11	528	456	186	2	1,172
TOTAL	2,292	2,468	2,478	60	7,298
PERCENT	31%	34%	34%	0.8%	100%
ANNUAL AVG.	437	470	472	11	1,460

* Extra quarter included due to change in analysis timeframe



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**Projects with More
Than 20 Units
(01/01/11 to 12/31/11)**

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

Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2011 to December 31, 2011, the County issued 1,647 use and occupancy permits (Table 29). Of all planning areas, the Southeast had the most with 679. This is followed by the Ellicott City with 315, Columbia with 258, Elkridge with 208 and the Rural West with 187. Countywide, 30% of the permits were for single family detached units, 27% were for single family attached units and 43% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type, 1/01/2011 to 12/31/2011

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	31	3	224	0	258	16%
Elkridge	96	112	0	0	208	13%
Ellicott City	125	40	150	0	315	19%
Rural West	183	4	0	0	187	11%
Southeast	66	282	331	0	679	41%
TOTAL	501	441	705	0	1,647	100%
PERCENT	30%	27%	43%	0%	100%	

Five Year Results

From October 1, 2006 to December 31, 2011, a total of 7,010 use and occupancy permits have been issued in Howard County (Table 30). This is an annual average of 1,335 permits per year.

Of the 7,010 total use and occupancy permits issued over the five and a quarter year total, 33% were for single family detached units, 34% for single family attached units, and 33% for apartment units. Chart 12 shows the results by unit type graphically over time.

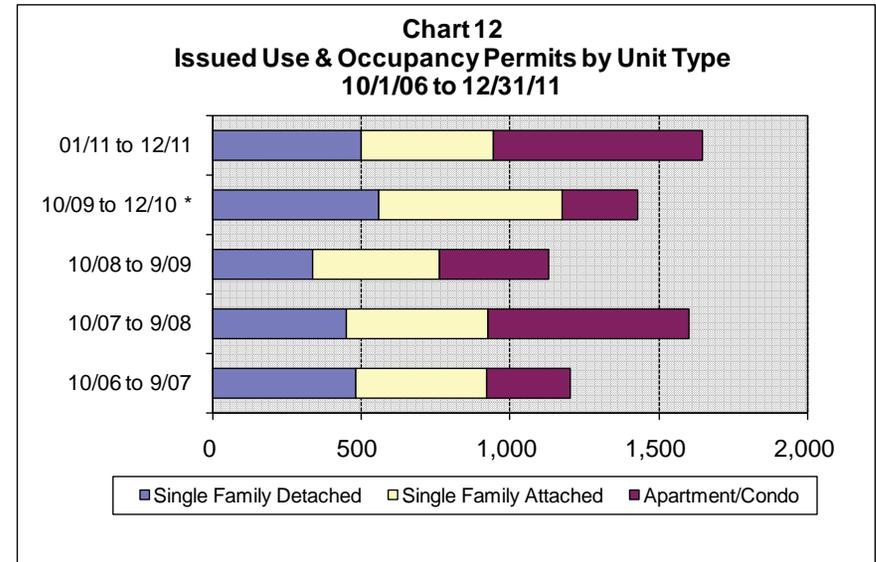


Table 30
Issued Use and Occupancy Permits by Unit Type, 1/01/11 to 12/31/11

Year	SFD	SFA	APT	MH	Total
10/06 to 9/07	484	438	280	0	1,202
10/07 to 9/08	452	475	675	0	1,602
10/08 to 9/09	337	427	368	0	1,132
10/09 to 12/10 *	558	616	253	0	1,427
01/11 to 12/11	501	441	705	0	1,647
TOTAL	2,332	2,397	2,281	0	7,010
PERCENT	33%	34%	33%	0%	100%
ANNUAL AVG.	444	457	434	0	1,335

* Extra quarter included due to change in analysis timeframe.

Age-Restricted and Moderate Income Housing Units

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

The General Plan established an annual 250 unit housing allocation set-aside for age-restricted units in the eastern part of the County as part of the County’s APFO. 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 20%, depending on particular criteria such as the zone, unit type and density. An additional 100 MIHU allocations were also added to the annual APFO chart.

The following summarizes recent development activity of age-restricted and MIHU units from January 1, 2011 to December 31, 2011, 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, 2011. This includes both subdivision and site development plans. There were 689 units in process, most of which are in Ellicott City and a smaller number in Columbia. The timing of actual development will be paced by APFO.

Countywide there were 412 apartments (including rental and condo), 184 SFA units and 93 SFD age-restricted units. Map 9 shows location and names of the particular projects. Table 37 shows the details of each of these projects.

Compared to last year, there are less age-restricted units in process in this current reporting period, 890 units versus 689, respectively.

Table 31
Age Restricted Units from Plans in Process, 12/31/2011
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	132	132	19%
Elkridge	0	0	0	0	0%
Ellicott City	93	184	280	557	81%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	93	184	412	689	100%
PERCENT	13%	27%	60%	100%	
As of 12/31/10	93	272	525	890	

Table 32 shows the total MIHU units in process. These total 881, the majority of which are in Elkridge. This is more than the number in process the previous year which had 771.

Table 32
MIHU Units from Plans in Process, 12/31/2011
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	5	12	17	2%
Elkridge	0	121	526	647	73%
Ellicott City	0	23	44	67	8%
Rural West	0	0	0	0	0%
Southeast	0	0	150	150	17%
TOTAL	0	149	732	881	100%
PERCENT	0%	17%	83%	100%	
As of 12/31/10	10	144	617	771	

Table 33 shows just the age-restricted MIHU units in process, 47 of the 881 MIHU unit total. The remaining 834 units are MIHU units that are not age-restricted. There were 67 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, 12/31/2010
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	12	12	26%
Elkridge	0	0	0	0	0%
Ellicott City	0	6	29	35	74%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	6	41	47	100%
PERCENT	0%	13%	87%	100%	

As of 12/31/10	0	11	56	67	
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Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2011 and December 31, 2011. There were a total of 58 units approved, a much smaller number than the 355 units approved during the previous reporting period. The 58 units include 28 apartment units and 30 townhouse units, all part of the Taylor Way project in the Village Crest development of Ellicott City. Map 9 shows the approved age-restricted projects during this time period. Table 38 shows the details for each of the plans (including MIHU's).

Table 35 shows the MIHU units in approved site development plans. A total of 51 units were approved – 20 in Ellicott City, 2 in Elkridge and 29 in the Southeast. None of these units were age-restricted - shown in Table 36. Map 10 shows the approved projects with MIHU units and Table 38 shows the plan details.

Table 34
Age Restricted Units from Approved Plans, 1/01/2011 to 12/31/2011
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	30	28	58	100%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	30	28	58	100%
PERCENT	0%	52%	48%	100%	

10/01/09 to 12/31/10	75	85	195	355	
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Table 35
MIHU Units from Approved Plans, 1/01/11 to 12/31/11
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	0	0	0%
Elkridge	0	2	0	2	4%
Ellicott City	0	0	20	20	39%
Rural West	0	0	0	0	0%
Southeast	10	6	13	29	57%
TOTAL	10	8	33	51	100%
PERCENT	20%	16%	65%	100%	

10/01/09 to 12/31/10	0	24	46	70	
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Table 36
Age-Res. MIHU Units from Approved Plans, 1/01/11 to 12/31/11
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
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%	

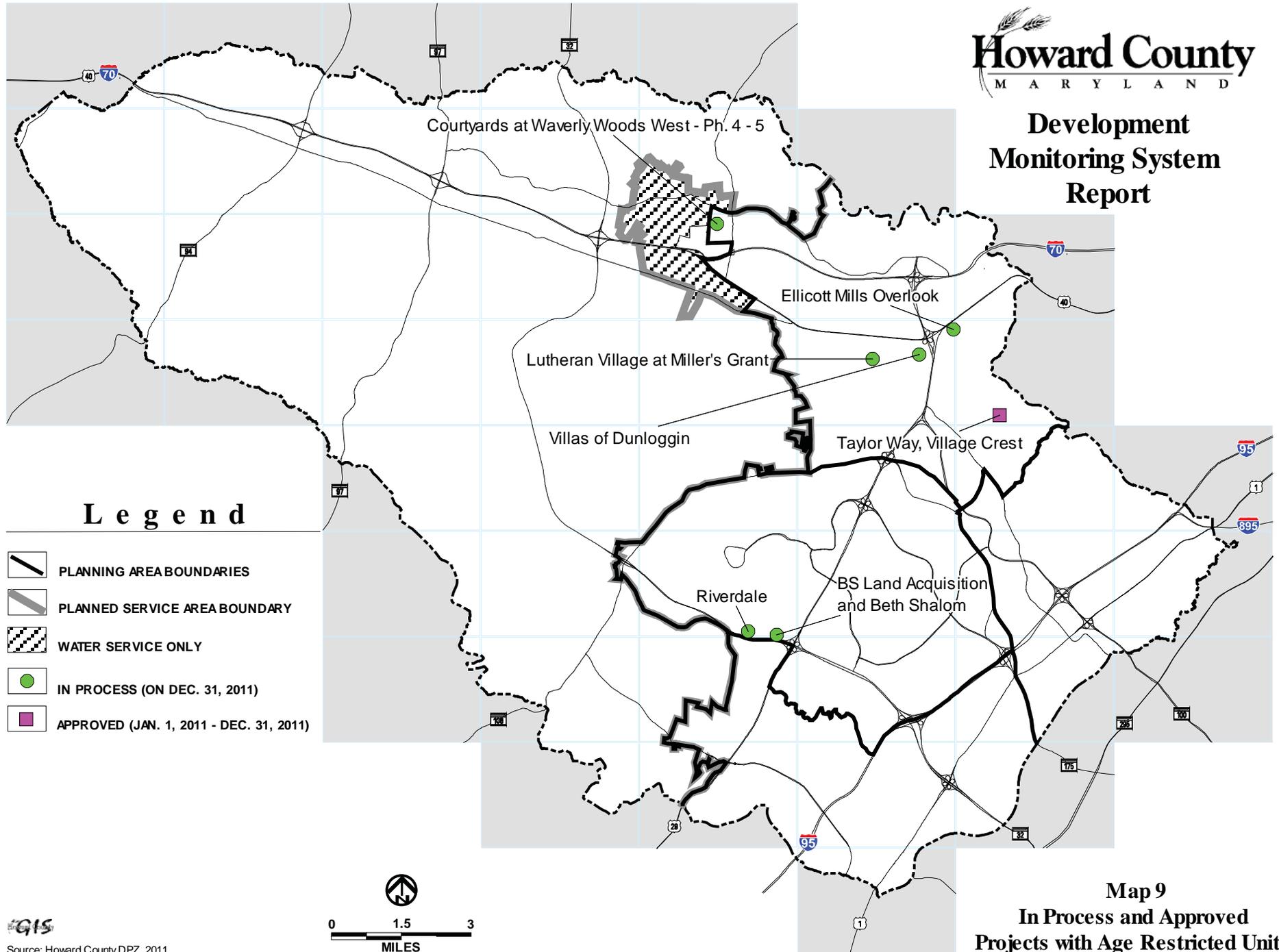
10/01/09 to 12/31/10	0	6	13	19	
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**Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2010**

Plan Name	File Number	Zoning	MIHU Units												Market Rate			
			Not Age Restricted				Age Restricted				Total MIHU				Age Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Howard Square	S-06-010	CAC	0	0	200	200	0	0	0	0	0	0	200	200	0	0	0	0
The Overlook at Bluestream	S-06-018	CAC	0	31	171	202	0	0	0	0	0	31	171	202	0	0	0	0
Village Towns	S-10-001	R-MH	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0
Morris Place	S-10-002	CAC	0	28	0	28	0	0	0	0	0	28	0	28	0	0	0	0
Laurel Park Station	S-10-004	CAC, TOD	0	0	150	150	0	0	0	0	0	0	150	150	0	0	0	0
Oxford Square	S-11-001	TOD	0	0	143	143	0	0	0	0	0	0	143	143	0	0	0	0
Ellicott Mills Overlook	S-12-001	POR-MXD-6	0	17	0	17	0	0	0	0	0	17	0	17	0	0	32	32
Fox Hunt Estates	SDP-07-007	R-SA-8	0	4	0	4	0	0	0	0	0	4	0	4	0	0	0	0
Villas of Dunloggin	SDP-07-054	R-SC	0	0	0	0	0	6	0	6	0	6	0	6	0	45	0	45
Lutheran Village at Miller's Grant	SDP-08-075	PSC	0	0	0	0	0	0	29	29	0	0	29	29	36	0	219	255
BS Land Acquisition and Beth Shalom	SDP-08-083	R-20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	20
Riverwatch	SDP-08-109	CAC	0	0	12	12	0	0	0	0	0	0	12	12	0	0	0	0
Courtyards at Waverly Woods West - Ph. 4 & 5	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	57	133	0	190
Dorset Gardens (Blue Stream)	SDP-11-040	CAC	0	24	0	24	0	0	0	0	0	24	0	24	0	0	0	0
Howard Square	SDP-11-043	CAC	0	14	0	14	0	0	0	0	0	14	0	14	0	0	0	0
Orchard Meadows	SDP-11-052	R-A-15	0	0	15	15	0	0	0	0	0	0	15	15	0	0	0	0
Howard Square	SDP-11-054	CAC	0	14	0	14	0	0	0	0	0	14	0	14	0	0	0	0
Simpson Mill	SDP-12-015	POR, R-SA-8	0	5	0	5	0	0	0	0	0	5	0	5	0	0	0	0
Riverdale	SP-08-002	POR, R-SA-8	0	0	0	0	0	0	12	12	0	0	12	12	0	0	100	100
TOTAL			0	143	691	834	0	6	41	47	0	149	732	881	93	178	371	642



Development Monitoring System Report



Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON DEC. 31, 2011)
-  APPROVED (JAN. 1, 2011 - DEC. 31, 2011)



0 1.5 3
MILES



Source: Howard County DPZ, 2011.

Map 9
In Process and Approved
Projects with Age Restricted Units

Table 38
Approved SDP's with MIHU and Age Restricted Units - January 1, 2011 to December 31, 2011

Plan Name	File Number	Zoning	MIHU Units											Market Rate Age Restricted Units				
			Not Age Restricted				Age Restricted				Total MIHU							
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Shipley's Grant - Phase 6	F-11-026	R-A-15	0	2	0	2	0	0	0	0	0	2	0	2	0	0	0	0
Beechcrest Apartments	SDP-10-050	CE-CLI, R-MH	0	0	13	13	0	0	0	0	0	13	0	0	0	0	0	0
Taylor Way, Village Crest	SDP-10-052	POR	0	0	0	0	0	0	0	0	0	0	0	30	28		58	
Riverwalk	SDP-10-060	R-SA-8	0	6	0	6	0	0	0	0	6	0	6	0	0	0	0	0
The Glens at Guilford	SDP-10-085	R-12	10	0	0	10	0	0	0	0	0	10	0	0	0	0	0	0
Hilltop Redevelopment	SDP-11-051	POR, R-A-15, R-VH	0	0	20	20	0	0	0	0	0	20	0	0	0	0	0	0
TOTAL			10	8	33	51	0	0	0	0	10	8	33	51	0	30	28	58

Number of Plans

Tables 39 through 41 show the number of plans that have age-restricted and MIHU units. Both plan in process and approved site development plans are shown. Between January 1, 2011 and December 31, 2011 there was 1 site plan approved with age-restricted units and 5 site plans approved with MIHU units. No age-restricted MIHU plans were approved.

On December 31, 2011 there were 6 plans in process that included age-restricted units and 17 plans with MIHU units. Three in process plans were age-restricted MIHU plans.

Table 39
Number of Plans with Age-Res. Units
1/01/11 to 12/31/2011

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

(1) In Process on Dec. 31, 2011

Table 40
Number of Plans with MIHU Units
1/01/11 to 12/31/2011

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	2	0
Elkridge	10	1
Ellicott City	4	1
Rural West	0	0
Southeast	1	3
TOTAL	17	5

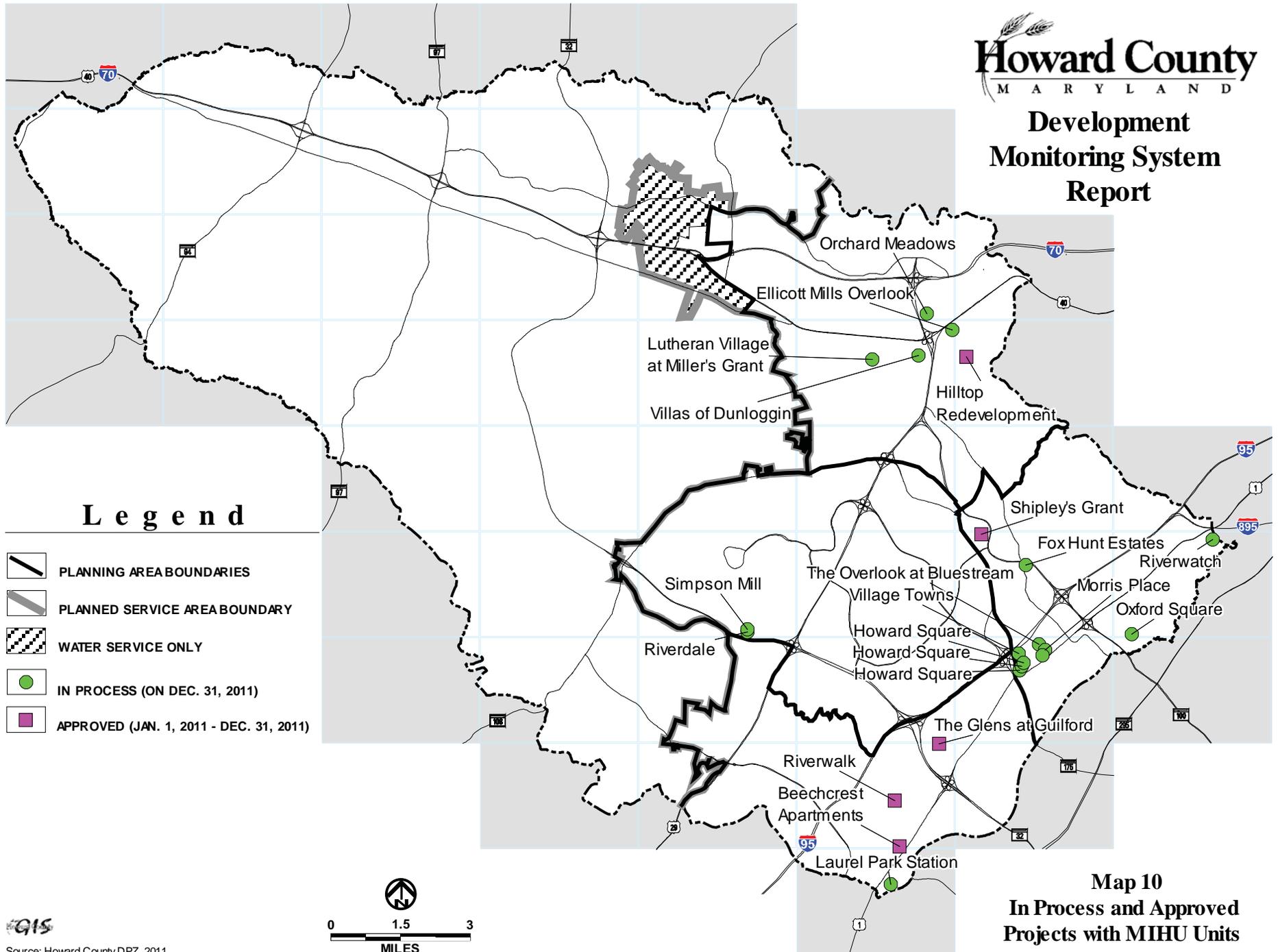
(1) In Process on Dec. 31, 2011

Table 41
Number of Plans with Age-Res. MIHU Units
1/01/11 to 12/31/2011

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	1	0
Elkridge	0	0
Ellicott City	2	0
Rural West	0	0
Southeast	0	0
TOTAL	3	0

(1) In Process on Dec. 31, 2011

**Development
Monitoring System
Report**



Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON DEC. 31, 2011)
-  APPROVED (JAN. 1, 2011 - DEC. 31, 2011)



Source: Howard County DPZ, 2011.



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

Use & Occupancy Permits

Table 42 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2011 and December 31, 2011 234 age-restricted units were built, 14% of the total 1,647 housing units built in the County over this latest reporting period.

There were slightly less age-restricted units built in the current reporting period compared to the previous period when there were 250 units built. (Note that the previous period covered 15 months compared to the current 12 month prior period due to the new reporting timeframe starting then.)

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

Table 42
Age Restricted Units Built, 1/01/11 to 12/31/11
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	5	3	0	8	3%
Elkridge	0	0	0	0	0%
Ellicott City	1	34	150	185	79%
Rural West	0	4	0	4	2%
Southeast	0	5	32	37	16%
TOTAL	6	46	182	234	100%
PERCENT	3%	20%	78%	100%	
10/01/09 to 12/31/10	0	132	118	250	

Table 43
Age Restricted Units Built Compared to Total Units, 10/01/05 to 12/31/11

Planning Area	SFD	SFA	APT	TOTAL	Total All Age-Restricted Units Built	% 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%
TOTAL	80	930	1,457	2,467	10,537	23%
PERCENT	3%	38%	59%	100%		

* Extra quarter included due to change in analysis timeframe.

Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from January 1, 2011 to December 31, 2011, have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 44). The data is graphically represented in Charts 13, 14, and 15.

Home prices in Howard County have increased last year compared to the previous reporting period. They had steadily declined from their \$394,000 median sales price in 2006/2007 for all housing types combined to a median of \$350,000 in 2008/2009 and again in 2009/2010. Last year, however, the median sales price for all housing types combined increased by 8.6%

to \$380,000. The mean sales price increased by 6.0% over the last year, from \$393,000 to \$416,000. Whereas single family detached and attached home prices increased last year, condos units, however, have continued to drop with median prices decreasing by 9.7%

Prices began declining slightly in 2006/2007, which was the first time prices had fallen for at least 15 years. Price declines accelerated thereafter. This downward trend has stopped, at least for single family units, and prices have rebounded. From the peak in 05/06, however, median prices for single family detached units are down 15.7%. The median for SFA or townhouse units are down by 11.8% and condos are down by a much larger 29%. Sales last year by zip code are shown on Map 11.

Table 44
Housing Sales by Type, 10/01/06 to 12/31/11

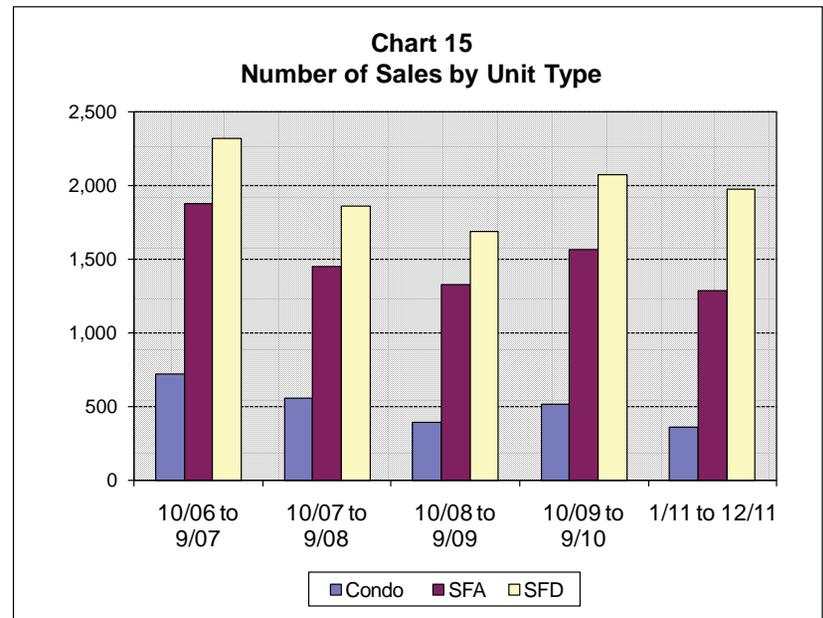
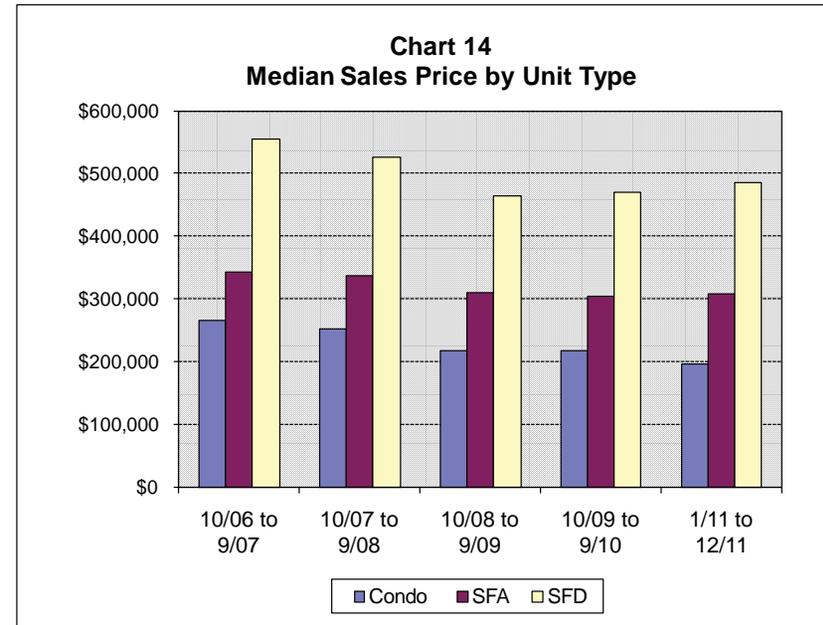
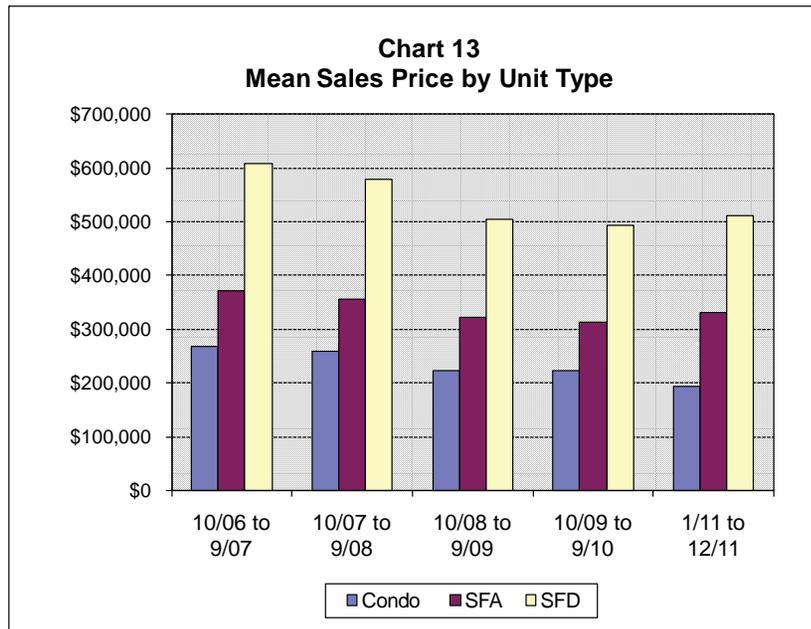
10/06 to 9/07				10/07 to 9/08			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	715	\$267,218	\$266,075	Condo	552	\$258,172	\$252,152
MH	6	\$125,133	\$130,150	MH	6	\$124,900	\$126,250
SFA	1,873	\$370,918	\$342,500	SFA	1,450	\$356,582	\$337,000
SFD	2,320	\$609,104	\$555,000	SFD	1,856	\$578,952	\$525,000
TOTAL	4,914	\$467,982	\$394,058	TOTAL	3,864	\$448,975	\$380,000

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

1/11 to 12/11			
Unit Type	# of Sales	Mean	Median
Condo	355	\$194,247	\$196,365
MH	0	\$0	\$0
SFA	1,283	\$330,800	\$308,000
SFD	1,972	\$511,613	\$485,000
TOTAL	3,610	\$416,143	\$380,000

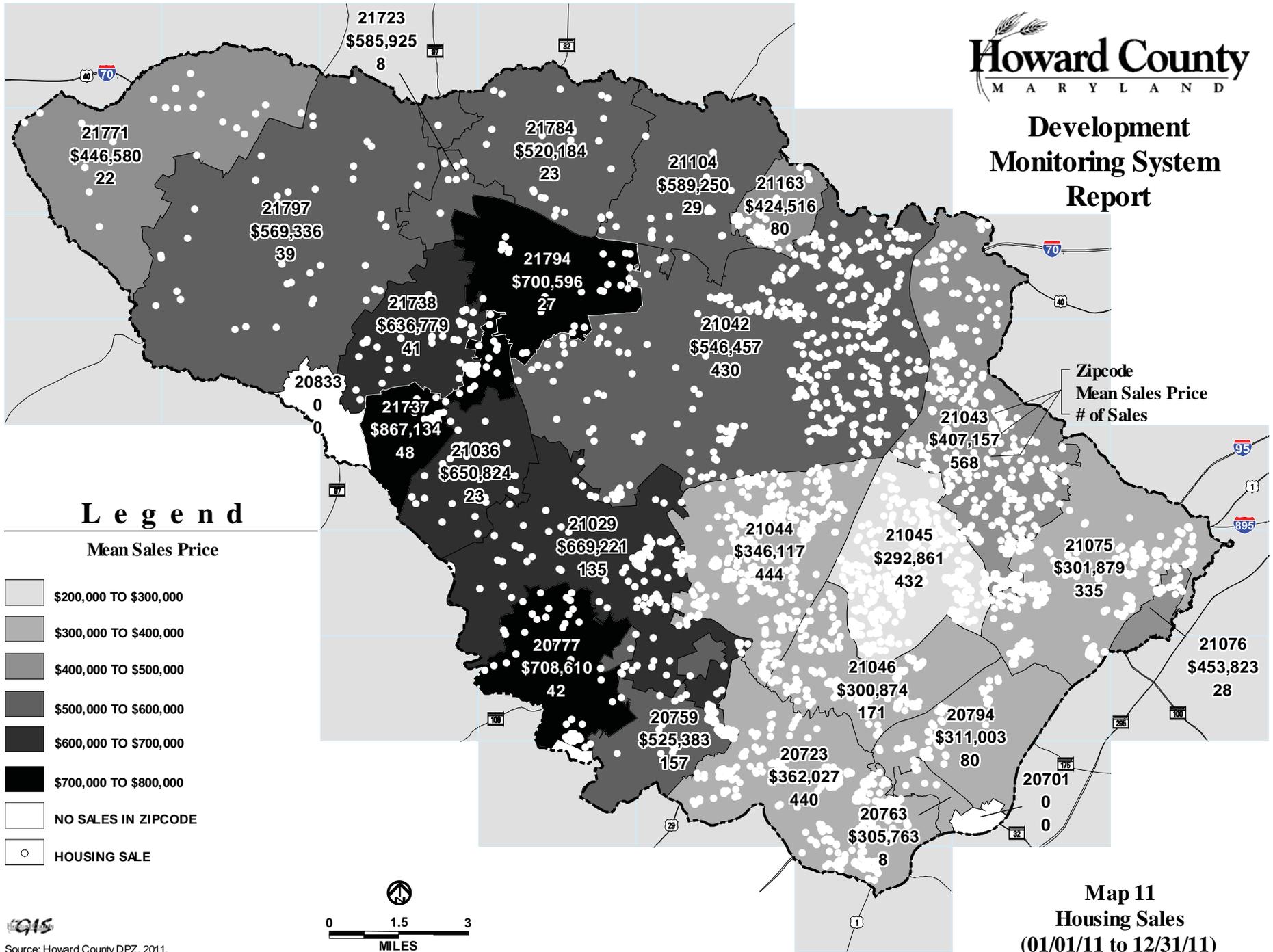
Source: Howard County DPZ analysis of housing sales data from SDAT

The number of home sales decreased last year with a total of 3,610 sales. This is a decrease from 4,150 sales reported in the previous reporting period, but more than the year before that when only 3,403 homes were sold. Chart 15 depicts these numbers by unit type.





Development Monitoring System Report



Source: Howard County DPZ, 2011.



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

Land Preservation

Agricultural Land Preservation Program

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

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

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

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

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

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

Of the seven total property owners who accepted their ALPP offers, settlement occurred on four of the farms during 2010. The remaining three properties settled during this current DMS reporting period and include a total of 793 acres that are now permanently preserved. Batch 14 concluded with the last settlement in August 2011, and there are now 14,633 total acres that have been preserved through the County purchase program.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/ CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992. During the current reporting period, one property totaling 13 acres was preserved with an agricultural easement through the development process.

As of December 31, 2011, there were 21,603 acres of permanently preserved agricultural land. This includes 14,633 acres of purchased easements through the County’s program, 4,041 acres of easements purchased by the State and 2,929 preservation acres dedicated as part of the development process (Table 45).

Table 45
Agricultural Preservation Easements, December 31, 2011

Type	Acres	Percent
County Purchased Agric. Easements	14,633	68%
State Purchased Agric. Easements	4,041	19%
Dedicated Agric. Preservation Parcels	2,929	14%
TOTAL	21,603	100%

Other Rural Easement Dedication

As previously indicated, last year 13 acres were preserved through the development process and enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 2,929.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 212 acres of land in 18 parcels were dedicated as joint Howard County/Homeowner's Association preservation parcels. Table 46 shows the land preservation totals from dedicated easements to date for all easement types.

Since 1992, preservation easements on 10,670 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 5,897 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 2,929 acres are held by the Howard County Agricultural Land Preservation Program. A total of 974 acres are jointly held by the Howard County Conservancy and Howard County and 339 acres are jointly held by Howard County and the Patuxent Conservation Corps. The remaining acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society as well as other holders.

Table 46 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 14,765 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,095 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 10,670 acres, is land in dedicated preservation easements as described earlier. Of the 4,095 acres for residential development, about 751 acres are not yet developed (built on), 2,936 acres are developed (built on) and 408 acres are for roads.

Preservation easements in the Rural West discussed above total 29,344 acres. This includes all 21,603 acres of agricultural preservation easements and 7,741 acres of environmental preservation parcels dedicated through the subdivision process. This represents about 31% of the approximate 94,660 total acres of land in the Rural West.

Table 46
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	417	493	
Undeveloped Lots (From Density Transfer)	240	258	
Total Undeveloped Lots	657	751	
Developed Lots (By Right)	1,787	2,018	
Developed Lots (From Density Transfer)	866	918	
Total Developed Lots	2,653	2,936	
Roadway		408	
TOTAL	3,310	4,095	27.7%
<hr/>			
Preservation	Lots	Acres	
Agricultural Preservation	85	2,929	
Howard County/Homeowner's Association	540	5,897	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	29	974	
Howard County/Patuxent Conservation Corps. Inc.	14	339	
Other	90	401	
Total Preservation	763	10,670	72.3%
<hr/>			
GRAND TOTAL (Includes Res. Develop.)	4,073	14,765	100.0%

Total Preserved Land in the Rural West

Including County and State parks (8,059 acres), WSSC land (2,466 acres), permanent historic easements (101 acres) and other environmental easements (1,199 acres) the total preserved land amounts to 41,169 acres, about 43% of all land in the Rural West.

Map 12 shows the preserved land as of December 31, 2011 including acquired (purchased) agricultural easements, dedicated agricultural and environmental preserved parcels, other environmental easements, as well as WSSC, County and State park land.

Neighborhood Preservation in the East

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

For the current reporting period covering calendar year 2011 there was one subdivision utilizing this option. Table 47 shows the aggregate results since the beginning of this program. A total of 4 neighborhood preservation parcels have been created totaling 7.6 acres. The easement holder for all six of these acres is Howard County. Through this process, additional density was created for 3 additional single family detached homes and 6 additional townhomes on a total of about 1.2 acres. These additional units are part of receiving subdivisions that total 184 housing units on 84.5 acres. Thus far through the end of 2011, 103 of these 184 units are built. It should be noted that 47.4 of the 84.5 acres are open space acres as normally required by the zoning and subdivision regulations.

Total Preservation Easements in the East

In addition to neighborhood preservation parcels in the east, there are also 194 permanent historic easements, 316 Maryland Environmental Trust and 112 other land trust conservation easements. Total preservation easements in the east therefore amount to 630 acres. This is summarized in Table 48.

Total Preserved Land in the East

Including County and State parks (10,081 acres), WSSC land (680 acres) and Columbia Association open space (3,718 acres) the total preserved land amounts to 15,109 acres, about 23% of all land in the east. Map 12 shows the locations of the preserved land by the various types.

Table 47
Neighborhood Preservation

Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Undeveloped Lots (By Right)	79	0	0	79	12.9
Undeveloped Lots (From Density Transfer)	2	0	0	2	0.3
Total Undeveloped Lots	81	0	0	81	13.2
Developed Lots (By Right)	36	60	0	96	17.9
Developed Lots (From Density Transfer)	1	6	0	7	0.9
Total Developed Lots	37	66	0	103	18.8
Open Space					47.4
Roadway					4.2
Other					0.9
Total	118	66	0	184	84.5 91.7%

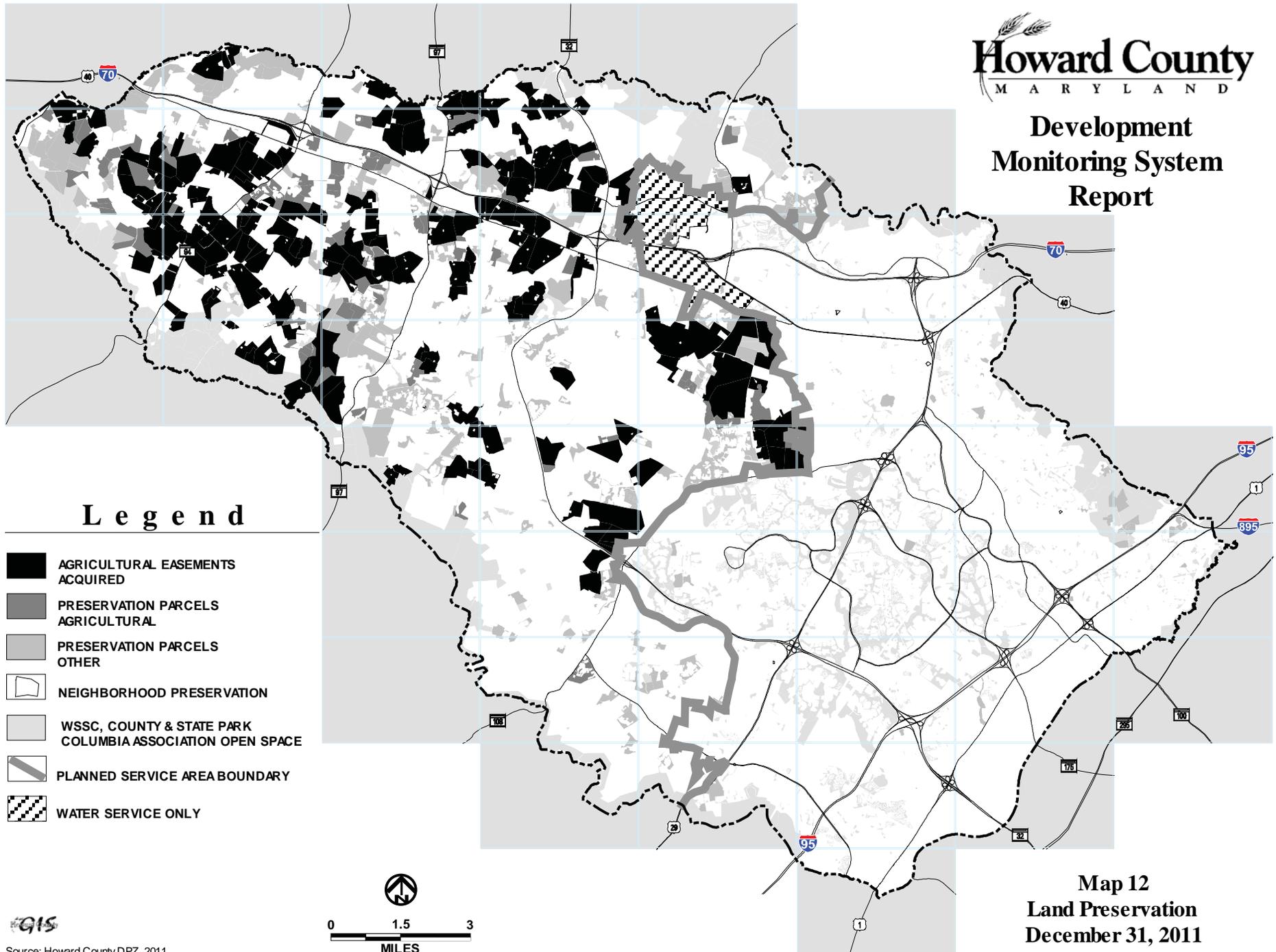
East Preserved Land - Sending Parcels Easement Holder	Preservation Parcels	Acres
Howard County Government	4	7.6
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Total Preservation	4	7.6 8.3%
GRAND TOTAL		92.1 100.0%

Table 48
East Preservation Easements, December 31, 2011

Type	Acres	Percent
Neighborhood Preservation	8	100%
Permanent Historic Easements	194	31%
Maryland Environmental Trust Easements	316	51%
Land Trust Conservation Easements	112	18%
TOTAL	622	100%
TOTAL EAST PRESERVATION	630	



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



Map 12
Land Preservation
December 31, 2011



Source: Howard County DPZ, 2011.

Non-Residential Development

Non-Residential Subdivisions

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

Recorded Plans

For the latest reporting period there were 6 non-residential lots recorded countywide in 12 subdivision plans totaling 210 acres (Table 49). It should be noted that many of these are resubdivisions that do not create new lots, but simply create roadway or easements. Some are parcel consolidations where the net number of lots actually get reduced.

Table 49
Recorded Non-Residential Subdivisions, 01/01/2011 to 12/31/2011

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	0	0%	2	17%	9	5%
Elkridge	1	17%	2	17%	123	59%
Ellicott City	0	0%	2	17%	22	11%
Rural West	0	0%	0	0%	0	0%
Southeast	5	83%	6	50%	55	26%
TOTAL	6	100%	12	100%	210	100%

Table 50 shows the recorded non-residential subdivisions from October 1, 2006 to December 31, 2011. Over this five year period there were 37 non-residential lots recorded countywide in 133 subdivision plans totaling 2,825 acres. This amounts to an annual average over the analysis time period of 7 lots in 25 plans encompassing 538 acres.

Table 50
Recorded Non-Residential Subdivisions, 10/01/06 to 12/31/10

Countywide	Lots	Plans	Acreage
10/06 to 09/07	9	41	1,120
10/07 to 09/08	14	36	477
10/08 to 09/09	3	18	371
10/09 to 12/10 *	5	26	647
01/11 to 12/11	6	12	210
TOTAL	37	133	2,825
ANNUAL AVG.	7	25	538

* Extra quarter included due to change in analysis timeframe

In-Process Plans

Countywide, there were 30 non-residential subdivision plans in process as of December 31, 2011. This compares to 24 plans in process for the previous reporting period (Table 51). Nine plans each were in the Southeast and Columbia, five plans each were in Ellicott City and Elkrigde, two were in the Rural West and three in Elkrigde. Most of the plans were in the final plan stage.

Table 52 shows the number of potential non-residential lots in process. As of December 31, 2011, there were 8 lots in process, compared to 26 in process on December 31, 2010. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 479 non-residential acres in the subdivision process as of December 31, 2011 (Table 53). This compares to 234 acres in process one year earlier. For the current year the greatest acreage amount is in the Elkrigde (202 acres). This is followed by the Southeast with 124 acres, Ellicott City with 91 acres, Columbia with 43 acres, and the Rural West with 20 acres in process.

Table 51
Number of Non-Residential Plans in Process, 12/31/2011
with Comparisons to 12/31/2010 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Columbia	4	0	0	0	5	9
Elkrigde	1	1	0	0	3	5
Ellicott City	1	1	0	0	3	5
Rural West	1	0	0	0	1	2
Southeast	3	0	1	1	4	9
TOTAL	10	2	1	1	16	30
12/31/10 Total	10	2	0	0	12	24

Table 52
Non-Residential Lots from Subdivision Plans in Process, 12/31/2011
with Comparisons to 12/31/2010 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Columbia	0	0	0	0	0
Elkrigde	1	0	0	0	1
Ellicott City	1	0	0	(1)	0
Rural West	0	0	0	1	1
Southeast	0	2	2	2	6
TOTAL	2	2	2	2	8
12/31/10 Total	6	0	0	20	26

Table 53
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2011
with Comparisons to 12/31/2010 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Columbia	0	0	0	43	43
Elkrigde	17	0	0	185	202
Ellicott City	26	0	0	64	91
Rural West	0	0	0	20	20
Southeast	0	13	15	96	124
TOTAL	44	13	15	408	479
12/31/10 Total	64	0	0	170	234

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 434,304 square feet were approved in 19 site development plans on 152 acres (Table 54). The greatest amount of square footage approved was in Elkrigde, followed by the Southeast and Ellicott City. Columbia and the Rural West had smaller amounts approved.

Table 55 shows the approved square footage by building type. About 167,000 square feet, 39% of the total, are for manufacturing/extensive industrial uses, most all of which is in Elkrigde. About 125,000 square feet, 29% of the total, are for government and institutional uses. Retail uses account for close to 100,000 square feet, followed by office/service uses with 43,000 square feet. Chart 16 shows this breakdown graphically.

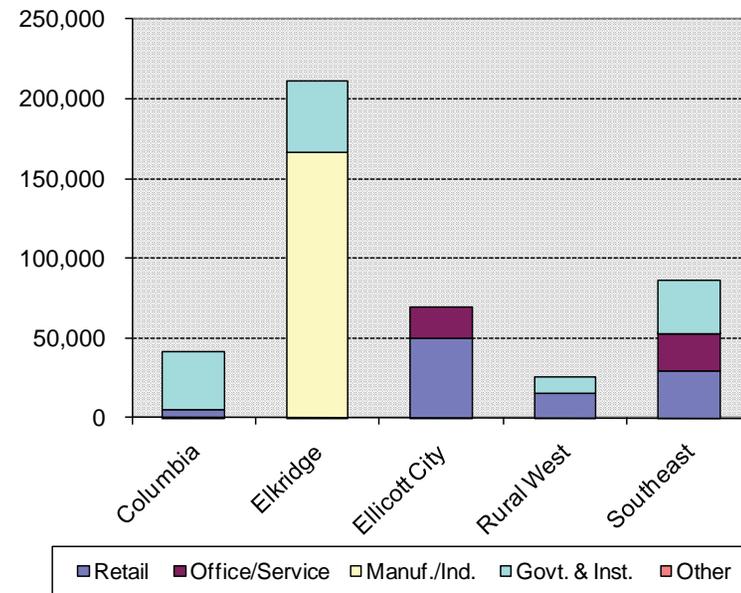
Table 55
Building Square Feet in Approved Site Development Plans
1/1/11 to 12/31/11

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	4,730	0	0	37,002	0	41,732
Elkrigde	0	0	166,789	44,187	0	210,976
Ellicott City	50,358	19,012	0	0	0	69,370
Rural West	15,726	0	0	9,950	0	25,676
Southeast	28,983	23,548	630	33,389	0	86,550
TOTAL	99,797	42,560	167,419	124,528	0	434,304
PERCENT	23.0%	9.8%	38.5%	28.7%	0.0%	100.0%

Table 54
Approved Non-Residential Site Development Plans, 1/1/11 to 12/31/11

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	41,732	10%	2	11%	7	5%
Elkrigde	210,976	49%	3	16%	23	15%
Ellicott City	69,370	16%	6	32%	59	39%
Rural West	25,676	6%	5	26%	51	33%
Southeast	86,550	20%	3	16%	13	8%
TOTAL	434,304	100%	19	100%	152	100%

Chart 16
Sq. Ft. in Approved Site Development Plans
1/1/11 to 12/31/11



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

Of the 434,304 square feet of non-residential building space approved in site development plans last year, about 332,000 square feet, 76% of the total, were in plans with more than 30,000 square feet. These larger plans are shown in Table 56. The locations of these plans are shown on Map 13.

In Columbia, one large plan was approved last year - a new Health Sciences building on the Howard County Community College campus. In ElkrIDGE, two large plans with more 30,000 square feet of building space were approved last year - a new warehouse in the Route One Hundred Business Park and a new nursing home and residential care facility.

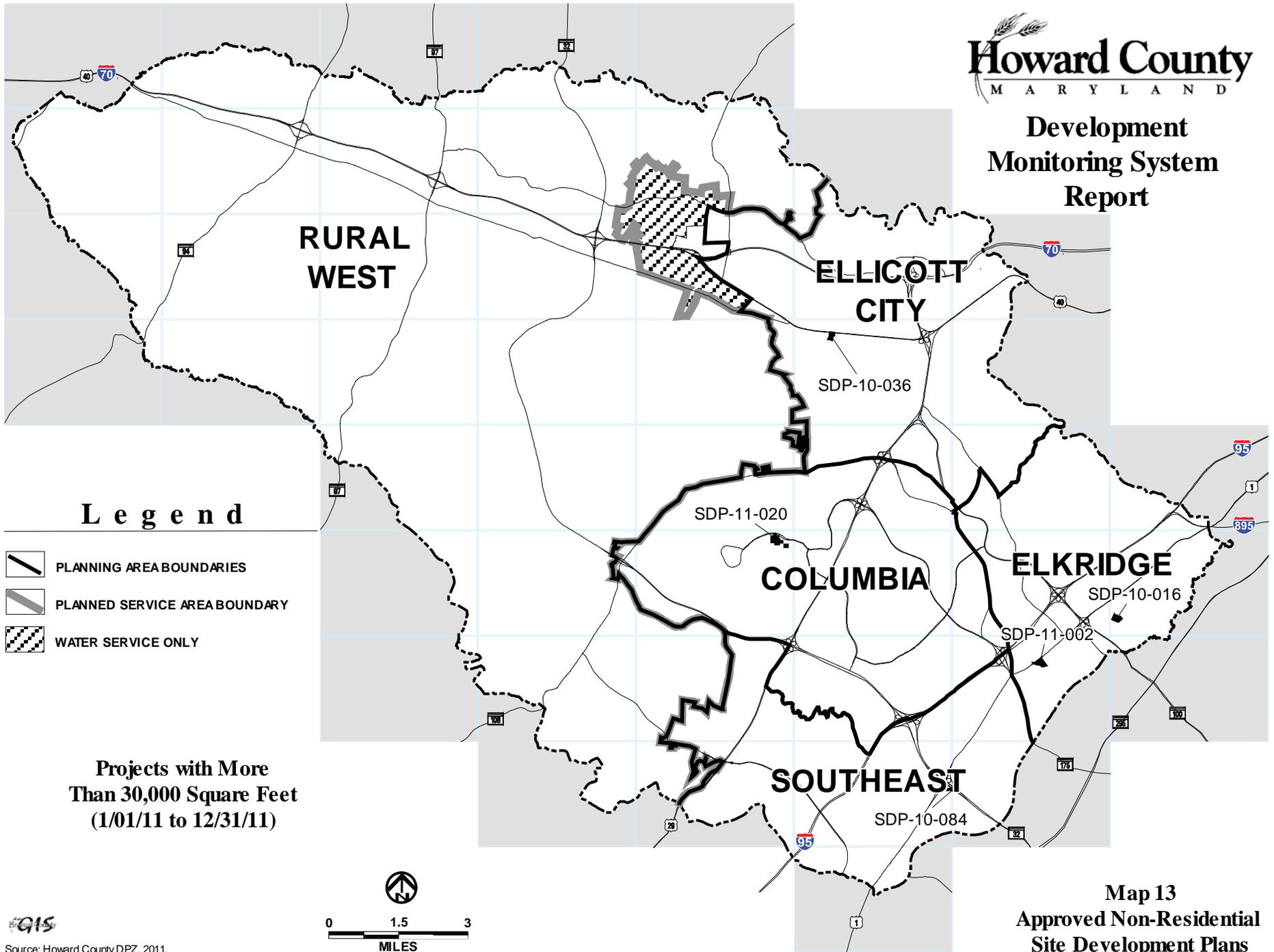
In Ellicott City a site plan with 50,000 square feet of retail space as part of the Forest Green project on Route 40 was approved. In the Southeast a new 33,000 square foot fire station on Route 1 was approved.

Table 56
Projects With More Than 30,000 Square Feet in Approved Non-Residential Site Development Plans, 1/1/11 to 12/31/11

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-11-020	Howard County Community College	Health Sciences Building	37,002	37,002
ElkrIDGE	SDP-10-016	Route One Hundred Business Park	Warehouse	166,789	210,976
	SDP-11-002	Lorien-ElkrIDGE Nursing Home & Assisted Living	Nursing Home & Residential Care	44,187	
Ellicott City	SDP-10-036	Forest Green	Retail	50,358	50,358
Southeast	SDP-10-084	Savage Volunteer Fire Station	Fire Station	33,389	33,389
TOTAL					331,725



Development Monitoring System Report



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PLANNED SERVICE AREA BOUNDARY
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Projects with More Than 30,000 Square Feet (1/01/11 to 12/31/11)



Map 13 Approved Non-Residential Site Development Plans

Five Year Results

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

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

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

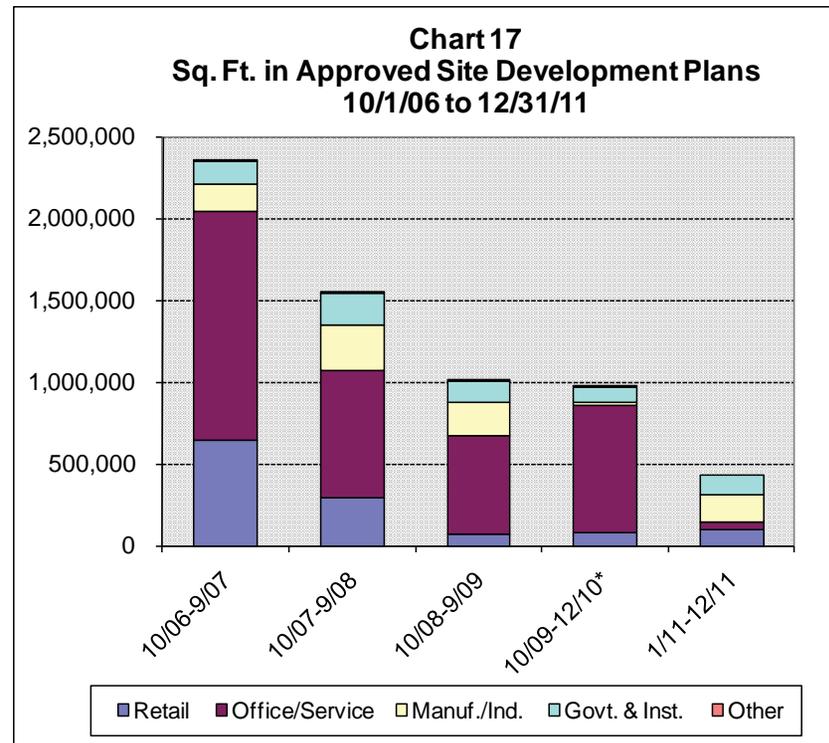


Table 57
Approved Non-Residential Site Development Plans
10/01/06 to 12/31/11

Year	Square Feet	Number or Plans	Acreage
10/06-9/07	2,352,254	61	542
10/07-9/08	1,551,216	49	333
10/08-9/09	1,005,507	34	260
10/09-12/10*	977,620	35	315
1/11-12/11	434,304	19	152
TOTAL	6,320,901	198	1,602
ANNUAL AVG.	1,203,981	38	305

* Extra quarter included due to change in analysis timeframe

Table 58
Building Square Feet in Approved Site Development Plans
10/01/06 to 12/31/11

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/06-9/07	643,215	1,400,027	160,676	142,799	5,537	2,352,254
10/07-9/08	290,184	776,645	278,920	197,662	7,805	1,551,216
10/08-9/09	67,872	601,203	205,296	130,416	720	1,005,507
10/09-12/10*	77,363	783,249	10,420	94,929	11,659	977,620
1/11-12/11	99,797	42,560	167,419	124,528	0	434,304
TOTAL	1,178,431	3,603,684	822,731	690,334	25,721	6,320,901
PERCENT	18.6%	57.0%	13.0%	10.9%	0.4%	100.0%

* Extra quarter included due to change in analysis timeframe

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of December 31, 2011 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 31 non-residential site development plans in process as of December 31, 2011. These plans include about 1.1 million square feet of building space covering 306 acres. This compares to about 1.1 million square feet in 37 plans on 472 acres that were in process the previous year (on December 31, 2010).

As shown in Table 59, Elkridge had the most square footage in process, followed closely by the Southeast. Table 60 shows a more detailed breakdown of square footage by building type. About 583,000 square feet are for office/service buildings and 357,000 for manufacturing/extensive industrial uses. Retail space accounts for 51,000 square feet and there is 83,000 square feet of government and institutional space in process.

Major Projects

Table 61 shows site development plans with buildings greater than 50,000 square feet. Map 14 shows the locations of these projects. These projects account for about 75% of the total 1.1 million square feet of building space in process.

Table 59
In-Process Non-Residential Site Development Plans, 12/31/11
with Comparisons to Countywide In-Process on 12/31/10

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	286,833	26%	7	23%	75	24%
Elkridge	348,563	32%	8	26%	151	49%
Ellicott City	100,589	9%	10	32%	48	16%
Rural West	6,000	1%	1	3%	6	2%
Southeast	347,548	32%	5	16%	27	9%
TOTAL	1,089,533	100%	31	100%	306	100%
12/31/2010	1,100,607		37		472	

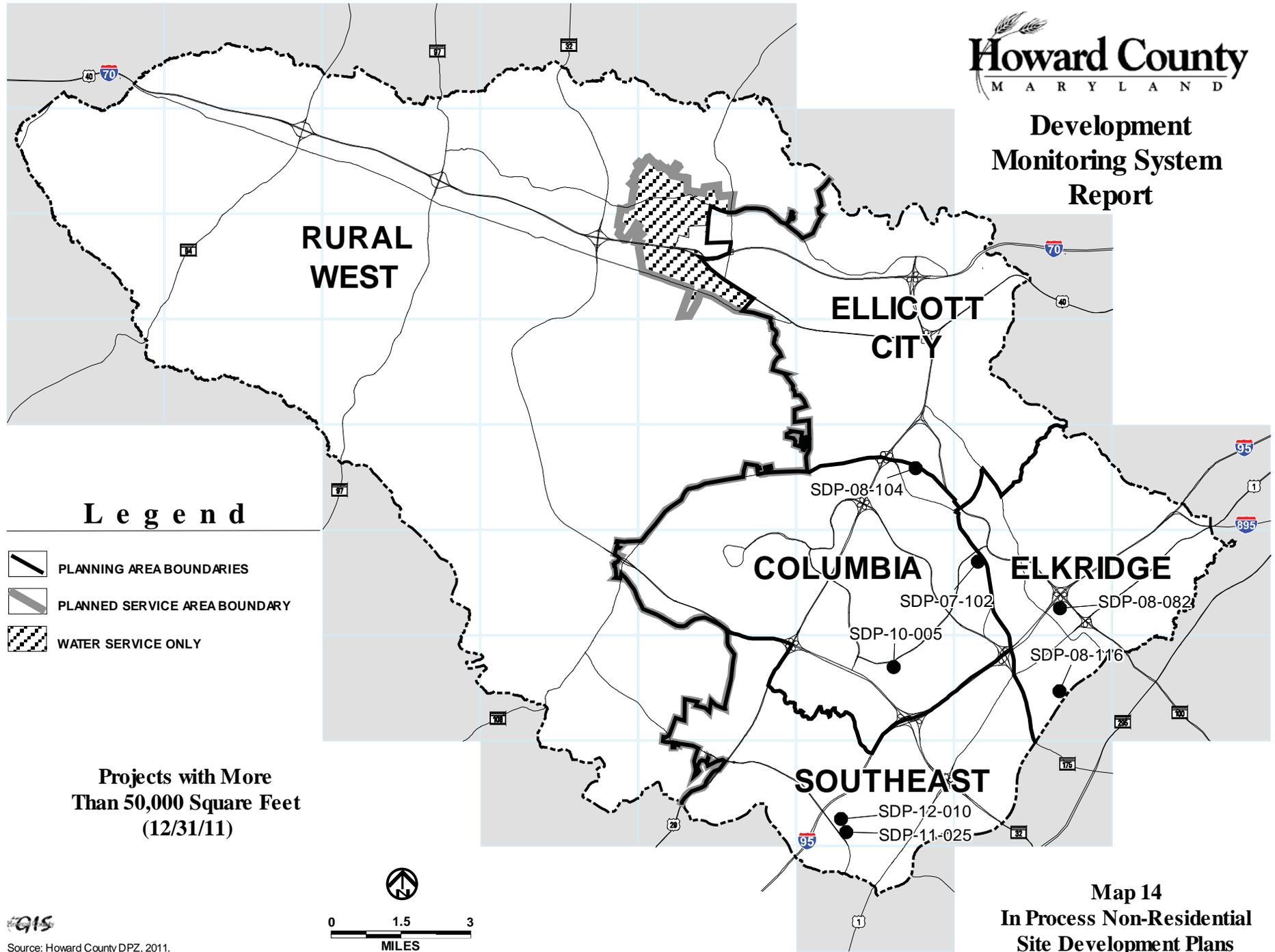
Table 60
Building Square Feet in In-Process Site Development Plans, 12/31/11
with Comparisons to Countywide In-Process on 12/31/10

Region	Office/Service		Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
	Retail	Service	Ext. Ind.	& Inst.	Other	
Columbia	10,180	66,000	172,700	37,953	0	286,833
Elkridge	2,850	152,089	184,044	0	9,580	348,563
Ellicott City	16,872	52,288	0	25,629	5,800	100,589
Rural West	0	6,000	0	0	0	6,000
Southeast	21,404	306,908	0	19,236	0	347,548
TOTAL	51,306	583,285	356,744	82,818	15,380	1,089,533
PERCENT	4.7%	53.5%	32.7%	7.6%	1.4%	100.0%
12/31/2010	133,027	311,846	527,615	128,119	0	1,100,607

Table 61
Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/11

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-10-005	Midway Business Center	Office/Warehouse	112,700	238,700
	SDP-07-102	Waterloo Crossing	Office	66,000	
	SDP-08-104	Dorsey Storage Building	Storage	60,000	
Elkridge	SDP-08-116	Dorsey Run Industrial Center	Warehouse/Office	162,800	270,800
	SDP-08-082	Corridor 95 Business Park	Office	108,000	
Southeast	SDP-11-025	Emerson Parcel G-1/Revitz Property	Office	153,454	306,908
	SDP-12-010	Emerson Parcel B and E-1	Office	153,454	
TOTAL					816,408

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Non-Residential Building Permits

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

Summary of Last Year

For the latest reporting period, from January 1, 2011 to December 31, 2011, 61 permits were issued for almost 778,000 square feet in non-residential building space (Table 62). The greatest amount of square footage was in Columbia, followed by the Southeast and then Ellicott City.

Table 62
Issued Non-Residential Building Permits, 1/01/11 to 12/31/11

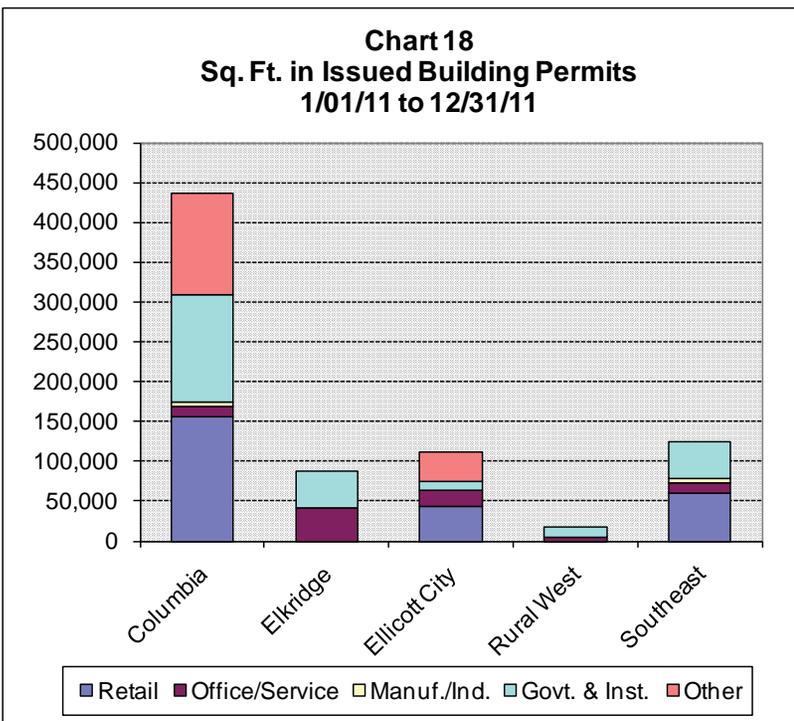
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Columbia	436,974	56%	21	34%
Elkridge	87,577	11%	6	10%
Ellicott City	110,728	14%	12	20%
Rural West	18,222	2%	7	11%
Southeast	124,411	16%	15	25%
TOTAL	777,912	100%	61	100%

Table 63 shows the approved square footage by building type. About 259,000 square feet, one-third of the total, are for retail uses. Another third, about 254,000 square feet, are for government & institutional uses. This is followed by other, office/service and manufacturing/extensive industrial uses. These last three categories combined make up the remaining third of the total square footage issued. Chart 18 shows this breakdown graphically by Planning Area. It is clear that retail space in the Columbia was the majority permitted.

Table 63
Building Square Feet in Issued Building Permits
01/01/11 to 12/31/11

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	155,266	13,300	4,940	134,944	128,524	436,974
Elkridge	0	40,953	0	46,624	0	87,577
Ellicott City	43,881	19,080	0	11,632	36,135	110,728
Rural West	288	3,744	0	14,190	0	18,222
Southeast	59,985	13,776	4,370	46,280	0	124,411
TOTAL	259,420	90,853	9,310	253,670	164,659	777,912
PERCENT	33.3%	11.7%	1.2%	32.6%	21.2%	100.0%

Chart 18
Sq. Ft. in Issued Building Permits
1/01/11 to 12/31/11



Last Year's Projects - Greater than 50,000 Square Feet

Of the 778,000 square feet of non-residential building space in issued permits over the current reporting period, about 602,000 square feet, 77% of the total, were in plans with more than 30,000 square feet. These larger buildings are shown in Table 64. The location of these buildings are shown on Map 15.

The largest project was Wegman's Food Market in Columbia, which includes a 149,000 square foot store and an adjacent 129,000 square foot parking garage. A new 113,000 square foot health sciences building was also permitted in Columbia at Howard Community College.

In Elkridge, building permits for two large projects were issued - a new Lorien Nursing Home (47,000 square feet) and a new flex medical office building (41,000 square feet) in the Meadowridge Center.

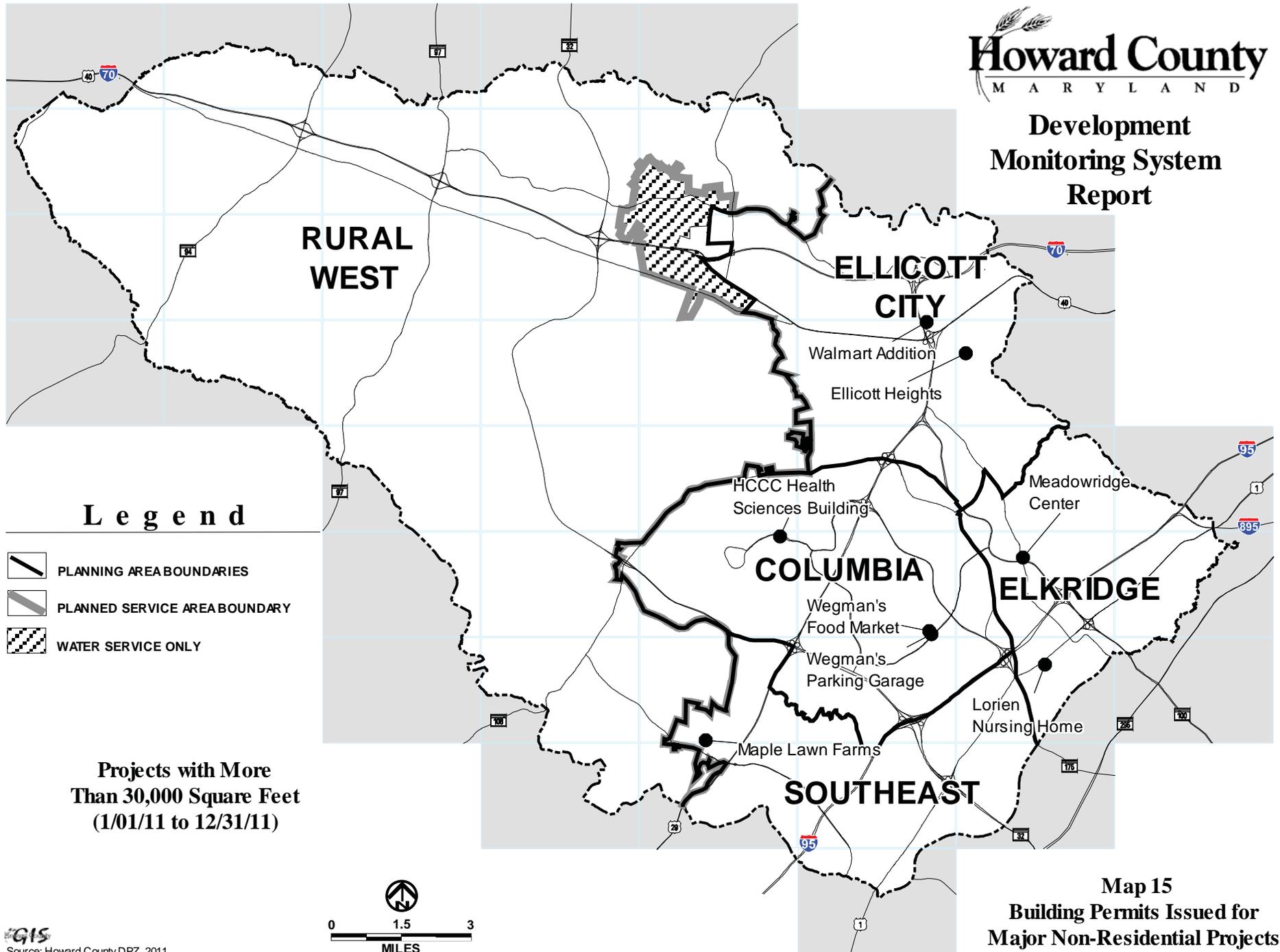
A 43,000 square foot addition was permitted for the Ellicott City Walmart. Another larger project in Ellicott City was a 36,000 square foot parking garage as part of the Ellicott Heights development (which is the first part of the Hilltop Housing redevelopment project).

In the Southeast, there was one larger project, a 47,000 retail building as part of Maple Lawn Farms.

Table 64
Building Permits Issued for Major Non-Residential Projects With More Than 30,000 Square Feet, 1/01/11 to 12/31/11

Region	Subdivision/Name	Proposed Use	Square Feet	TOTAL
Columbia	Wegman's Food Market	Grocery Store	147,848	389,403
	Wegman's Parking Garage	2 Level Structured Parking	128,524	
	HCC Health Sciences Building	Educational Building	113,031	
Elkridge	Lorien Nursing Home	Nursing Home & Assisted Living	46,624	87,334
	Meadowridge Center	Flex/Medical/Office Bldg	40,710	
Ellicott City	Walmart Addition	Store Addition	43,045	78,577
	Ellicott Heights	Parking Gagage	35,532	
Southeast	Maple Lawn Farms	Retail Building	46,620	46,620
TOTAL				601,934

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**Projects with More
Than 30,000 Square Feet
(1/01/11 to 12/31/11)**



0 1.5 3
MILES



Source: Howard County DPZ, 2011.

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

Five Year Results

Table 65 shows issued non-residential building permits countywide for the last five reporting periods from October 1, 2006 to December 31, 2011. Over this timeframe there were 412 permits issued for about 6.6 million square feet of building space. This equates to an annual average of about 1.3 million square feet per year.

The latest reporting period, with about 778,000 square feet in issued permits, is the smallest amount of activity in the last 5 years. In fact it is the smallest annual amount ever reported since the Development Monitoring System was established in 1992. It is clear from the data that there has been a slowing trend over the last five years with about 2.2 million square feet issued in 06/07, followed by 1.5 million square feet issued in 07/08, and then 1.1 million square feet issued in 08/09 and about the same in 09/10. The recent recession has no doubt played a major role in this slowdown.

Table 66 shows the five year history by building type. Over the five years, 44% of the total 6.6 million square feet was for office/service space. About 17% was for retail space, 22% for government and institutional uses and 8% for manufacturing/extensive industrial space. Chart 19 shows this graphically.

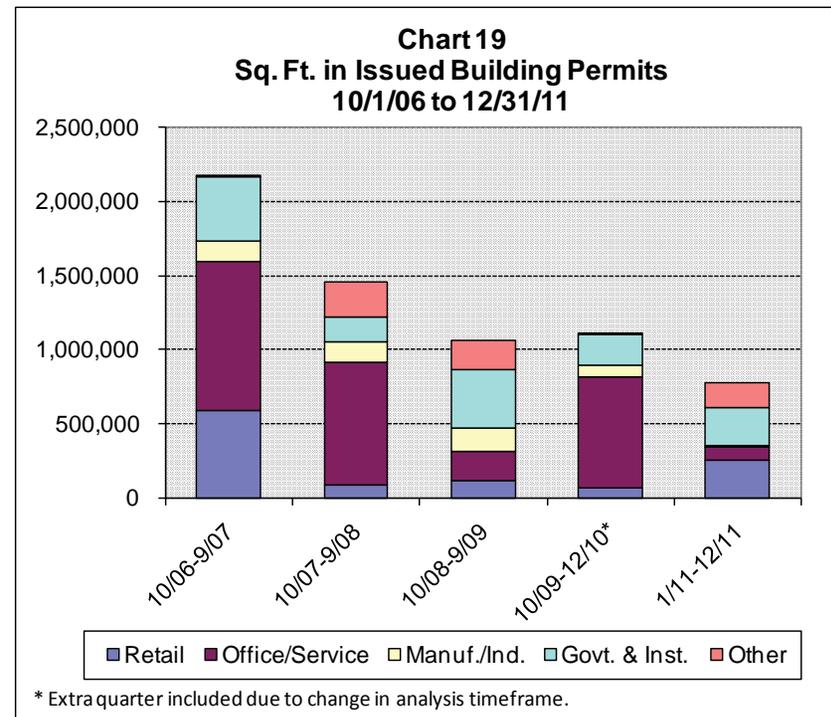


Table 65
Issued Non-Residential Building Permits
10/01/06 to 12/31/11

Year	Square Feet	Number of Permits
10/06-9/07	2,178,823	89
10/07-9/08	1,459,126	93
10/08-9/09	1,068,150	86
10/09-12/10*	1,117,809	83
1/11-12/11	777,912	61
TOTAL	6,601,820	412
ANNUAL AVG.	1,257,490	78

* Extra quarter included due to change in analysis timeframe

Table 66
Building Square Feet in Issued Building Permits
10/01/06 to 12/31/11

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/06-9/07	589,973	1,004,609	139,455	431,236	13,550	2,178,823
10/07-9/08	94,586	827,946	133,171	171,269	232,154	1,459,126
10/08-9/09	115,599	205,726	148,695	399,340	198,790	1,068,150
10/09-12/10*	68,708	752,768	75,881	212,786	7,666	1,117,809
1/11-12/11	259,420	90,853	9,310	253,670	164,659	777,912
TOTAL	1,128,286	2,881,902	506,512	1,468,301	616,819	6,601,820
PERCENT	17.1%	43.7%	7.7%	22.2%	9.3%	100.0%

* Extra quarter included due to change in analysis timeframe

Employment Estimates

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

Table 67
Square Feet per Employee Standard Factors

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

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

Job Potential from Site Development Plans

Based on the above factors, building space in site development plans approved last year from January 1, 2011 to December 31, 2011 could accommodate an estimated 836 employees (Table 68). About 31% of the potential jobs are located in ElkrIDGE, where they are mostly manufacturing/extensive industrial jobs. About 24% of the potential jobs are Ellicott City, mostly retail jobs. About 28% of the jobs each are in the Southeast.

Countywide, about 250 potential jobs, or about 30% of the total are retail jobs. Another 250 are government and institutional jobs. This is followed by 20% each for office/service and manufacturing/extensive industrial jobs.

Table 68
Potential Employment from Approved Non-Residential SDP's
By Use Category, 1/01/11 to 12/31/11

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Columbia	12	0	0	74	86	10%
ElkrIDGE	0	0	167	88	255	31%
Ellicott City	126	76	0	0	202	24%
Rural West	39	0	0	20	59	7%
Southeast	72	94	1	67	234	28%
TOTAL	249	170	167	249	836	100%
PERCENT	29.8%	20.4%	20.0%	29.8%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 69 below, there is a potential of 1,529 new jobs that could be accommodated based on issued building permits. About 42% of the potential are retail jobs, with the most in Columbia. This is followed by 33% government and institutional jobs, 24% office/service jobs, and 0.6% manufacturing/extensive industrial jobs.

Table 69
Potential Employment from Issued Building Permits
By Use Category, 1/01/11 to 12/31/11

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Columbia	388	53	5	270	716	47%
ElkrIDGE	0	164	0	93	257	17%
Ellicott City	110	76	0	23	209	14%
Rural West	1	15	0	28	44	3%
Southeast	150	55	4	93	302	20%
TOTAL	649	363	9	507	1,529	100%
PERCENT	42.4%	23.8%	0.6%	33.2%	100.0%	

State DLLR and U.S. BEA Employment Estimates

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

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance Law of Maryland and the unemployment compensation for federal employees program. Together these two account for approximately 98% of all wage and salary civilian employment. Since wage and salary employment represents approximately 93% of total civilian employment, DLLR estimates that their data reflects over 91% of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 23% of Howard County's employment in 2008 was not reported by the State.

Table 70 shows both DLLR and BEA employment data beginning in 2000. BEA data have a two year lag time resulting in no available data for 2010 and 2011. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,047 jobs per year for the last 11 years. This is lower than the 2000 General Plan growth target of 4,000 new jobs per year between 2000 and 2010. Job losses for 2009 and 2010 due to the recession as reported by DLLR have significantly lowered the 10 year average.

Jobs reported by the BEA through 2009 (the latest year available) result in an annual average of 3,101 new jobs from 2000 to 2009, closer in-line with the General Plan target.

For the most recent reporting period, from 2010 to 2011, the State reports a significant increase of 6,188 jobs in Howard County. This increase follows two years of job losses resulting from the Great Recession, which lasted from December 2007 through June 2009. That was the first two year decline in jobs in Howard County ever recorded (at least as far back as 1969). The last time a single year job loss occurred was in 1991 when 373 jobs were lost as reported by DLLR.

Table 71 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2010 and 2011. In the first quarter of 2011, DLLR reported that there were 147,357 jobs in Howard County with an average weekly wage of \$1,139. This compares to 141,169 jobs one year earlier with an average wage of \$1,066. This is a 6.9% increase in average weekly wages over the one year time period.

Table 70
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Change	Jobs	Increase
2000	124,843		159,188	
2001	130,717	5,874	164,984	5,796
2002	133,338	2,621	167,832	2,848
2003	133,231	(107)	168,209	377
2004	136,493	3,262	172,847	4,638
2005	135,462	(1,031)	178,019	5,172
2006	141,236	5,774	185,809	7,790
2007	145,385	4,149	190,036	4,227
2008	147,573	2,188	193,187	3,151
2009	142,266	(5,307)	187,096	(6,091)
2010	141,169	(1,097)	NA	NA
2011	147,357	6,188	NA	NA
Average		2,047		3,101

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

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

Table 71
Jobs and Weekly Wages by Industry, 2010 and 2011

Job Type	2010		2011	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	656	\$1,243	647	\$1,296
State Government	3,387	\$948	3,626	\$883
Local Government	14,156	\$890	14,175	\$881
Subtotal/Average	18,199	\$913	18,448	\$896
Goods Producing				
Natural Resources and Mining	451	\$651	657	\$588
Construction	9,104	\$1,168	9,279	\$1,232
Manufacturing	5,847	\$1,166	6,250	\$1,573
Subtotal/Average	15,402	\$1,152	16,186	\$1,337
Service Providing				
Trade, Transportation, and Utilities	30,443	\$884	30,927	\$902
Information	3,651	\$1,526	3,752	\$1,756
Financial Activities	8,078	\$1,594	8,731	\$1,753
Professional and Business Services	34,453	\$1,538	37,469	\$1,634
Education and Health Services	14,648	\$770	14,764	\$773
Leisure and Hospitality	11,947	\$327	12,459	\$353
Other Services	4,348	\$609	4,621	\$624
Subtotal/Average	107,568	\$1,080	112,723	\$1,151
TOTAL	141,169	\$1,066	147,357	\$1,139

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

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