



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

April 2011



Howard County

M A R Y L A N D

DEPARTMENT OF PLANNING & ZONING

Marsha S. McLaughlin, Director

A Message from the Planning Director:

I am pleased to present this year's Development Monitoring System report (DMS). This report has been issued each year since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. For the first time with this issue, the reporting period has been adjusted to include the full 2010 calendar year, rather than an October 1 through September 30 time period. This is a result of recent amendments to State law, known collectively as the Smart, Green and Growing legislation. These amendments require 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. The reports are due in July covering development activity for the previous calendar year. This is the first DMS report that incorporates this time adjustment and thus covers calendar year 2010 (plus the last 3 months of 2009).

Most of the reporting requirements in the Smart, Green and Growing legislation were already covered in our DMS report. However, there are some additional items. A new section beginning on Page 7 includes the additional information. The reporting of this information not only meets the new State planning requirements, but its integration into DPZ's existing reporting format provides a better understanding of land development issues, policies and goals. A summary of what's new can be found on Page 2. We have also added an interactive web map showing the net density of residential growth in 2010 - click here: [Net Density of Growth](#).

For the first 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 (Page 50). Land preservation in the Rural West was very active over the this reporting period with 580 acres preserved in the County's Agricultural Land Preservation program as dedicated environmental easements.

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 one and a quarter year reporting period, there were 1,427 housing units built in the County. Of these, 39% were single family detached homes, 43% were townhouses and 18% were condo or rental apartments. On an average annual basis, this is about the same number of homes built during last year's reporting period and reflects the continued slow down in the housing market compared to previous years prior to 2009.

Non-residential building was also relatively slow. Building permits were issued for about 1.1 million square feet of space in the latest reporting period. This compares to a five (and a quarter) year annual average of 1.7 million square feet in issued permits. Furthermore, the non-residential pipeline activity has declined with only 1.1 million square feet in-process in site development plans, 35% less than the 1.7 million square feet in process the previous year. There is anticipation, however, that the commercial building market will strengthen as the economy continues to recover and the impact from BRAC and cyber security initiatives accelerate. The County will no doubt continue to attract employers and residents given its ideal location, excellent school system, and high quality of life.

Sincerely,



Marsha S. McLaughlin

Development Monitoring System Report

Date Issued:

April 2011

Reporting Period:

October 1, 2009 to December 31, 2010

With countywide summaries from October 1, 2005

Produced by:

Howard County Department of Planning and Zoning
Division of Research

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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 197 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 five elementary school and two middle school districts closed to development. Thus far into the current fiscal year, four projects with 243 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 19th 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 first DMS report that incorporates this time adjustment and thus covers calendar year 2010 (plus the last 3 months of 2009).

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). For an interactive density map select this link: [Net Density of Growth](#). 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 1,379 new housing units built in the County. About 35% of these have been single family detached, 36% single family attached or townhouse units, and 29% apartment units (including both rental and condo). Over this time period, the number of new single family detached units has generally declined while the percentage of new townhouse and apartment units has increased. (Chart 1)

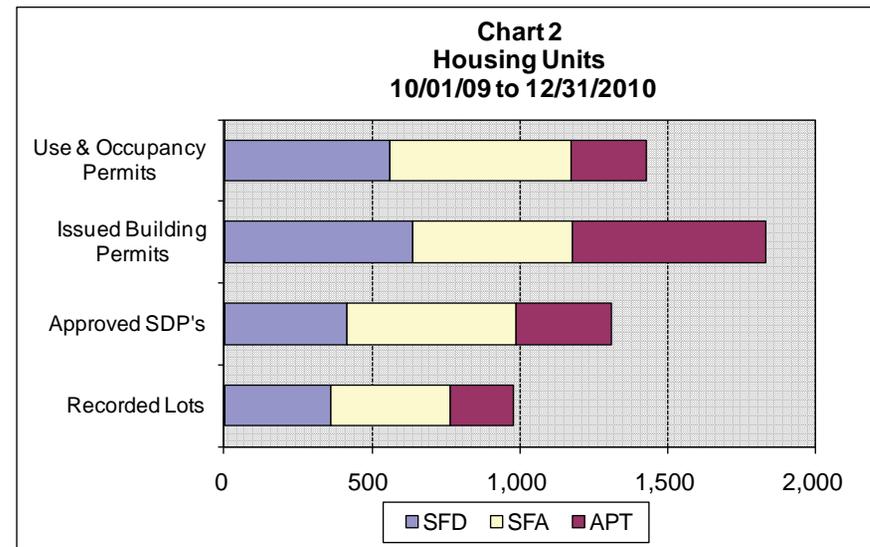
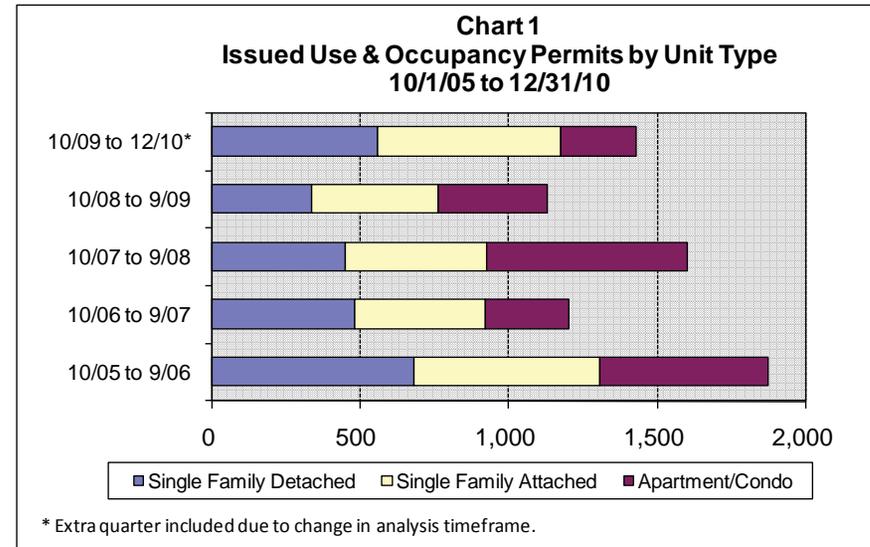
- During the latest reporting period, from 10/09 through 12/10, 1,427 housing units were built. This is an increase from the previous reporting period when only 1,131 units were built, the smallest number since 1981. However, taking into consideration that the latest reporting period includes an extra quarter, unit completion activity is roughly the same at an average annual amount of 95 units per month.

- Of the 1,427 completed units, 39% were for single family detached, 43% for townhouse, and 18% 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.

- About 33% of all units were built in Ellicott City, another 31% in the Southeast, 20% in Elkrigde, 11% each in the Rural West and 4% in Columbia. (See map on Page 6 that show these five planning areas.)

- The number of building permits issued (housing starts) during this current reporting period was 1,833, significantly more than the 1,237 permits issued the previous reporting period. Comparing monthly averages, building permit activity during the latest reporting period is still up almost 20% with an average of 122 monthly permits issued in the current reporting period compared to 103 during the previous reporting period.

- Over the latest reporting period, there was potential for 979 units from recorded lots and 1,309 units approved in site development plans (Chart 2). This compares to five (and a quarter) year annual averages of 1,224 units from recorded lots and 1,297 units in approved site development plans.



- As of December 31, 2010 there were 8,108 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 7,338 units in process for the prior reporting period (September 30, 2009).
- A significant number of the in-process units – 6,098 or 75% of the total 8,108 – 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 and Howard Square in Elkridge, and Turf Valley and the Courtyards in Ellicott City.
- Countywide, 28% of the units in process on September 31, 2010 were single family detached units. About 26% were single family attached units and another 46% were apartment units (including both condo and rental).

Age-Restricted Units

- There were 250 age-restricted housing units built during the latest reporting period, 18% of the total 1,427 units built in the County. These 250 units consisted of 132 townhouse units and 118 apartment or condo units. Most of the units were built in Ellicott City.
- As of December 31, 2010 there were 890 age-restricted units in the planning process – 93 single family detached units, 272 townhouse units and 525 apartment or condo units. About 66% these are in Ellicott City, 15% in Columbia, 16% in the Southeast, and 4% in Elkridge. For the previous reporting period there were 1,187 age-restricted units in process, 297 more than the current year.

Moderate Income Housing Units

- For the current reporting period there were 70 MIHU units in approved plans - 24 townhouse units and 46 apartment or condo units. This is more than the 36 approved MIHU units the previous reporting period.
- As of December 31, 2010 there were 771 MIHU units in process – 10 single family detached, 144 townhouse units and 617 apartment or condo units. About 65% of the units were in Elkridge, 25% in the Southeast, 6% in Ellicott City and 4% in Columbia. By comparison, there were 637 MIHU units in process the previous reporting period.
- Of the 771 MIHU units in process, 67 are age-restricted. This is about 9% of all MIHU units in process and includes 56 apartment or condo units and 11 townhouse units.

Rural Land Preservation

- For the current reporting period, 580 acres of agricultural and environmentally sensitive land were permanently preserved in the Rural West. This includes 374 acres purchased through the Howard County Agricultural Land Preservation program. The other 206 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 28,353 acres. This includes 20,824 acres of agricultural preservation easements and 7,529 acres of environmental preservation parcels dedicated through the subdivision process. This totals 30% of the land in the Rural West. Including park land, WSSC land and other environmental easements, 42% of the Rural West is now permanently preserved.

Housing Sales

- Home prices in Howard County appear to have stabilized, remaining essentially flat compared to the previous year. They had declined from their peak \$400,000 mean sales price in 2005/2006 for all housing types combined to a mean of \$350,000 in 2008/2009, and remained at that level last year in 2009/2010.
- Prices began declining slightly in 2006/2007, which was the first time prices had fallen for at least 15 years. Price declines accelerated thereafter. The downward trend appears to have stopped. Since the peak in 05/06, median prices for single family detached units have fallen by 18%. The median for townhouse units have fallen by 13% and condos by 21%.
- For the latest reporting period, the median sales price for condos was \$217,500. Townhouse units sold on average for \$305,000. The median single family detached home in the county sold for \$470,000.

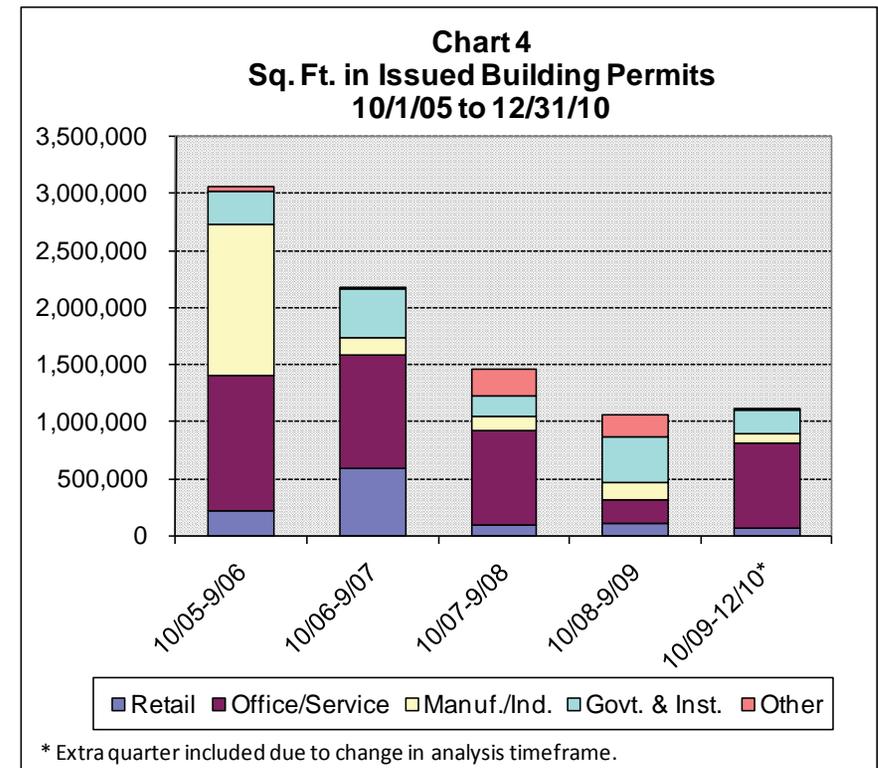
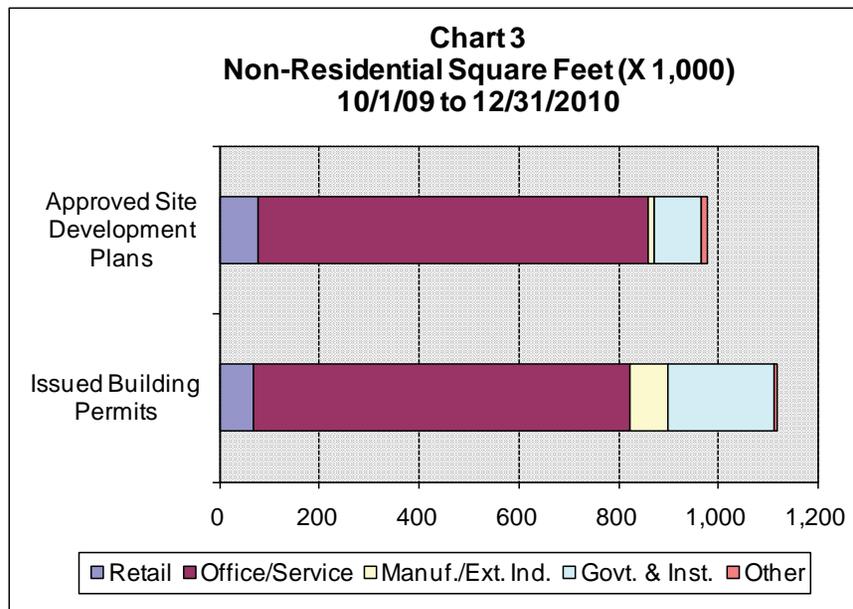
Net Density of Growth

- The greatest average net density of new residential construction in Howard County during 2010 occurred in Elkridge at 20.44 units per acre. This was followed by the Southeast at 11.65 units per acre, Ellicott City at 8.29 units per acre and Columbia at 6.69 units per acre. The average net density for new residential construction in the Rural West was 0.83 units per acre. For an interactive density map select this link: [Net Density of Growth](#).

Non-Residential Development

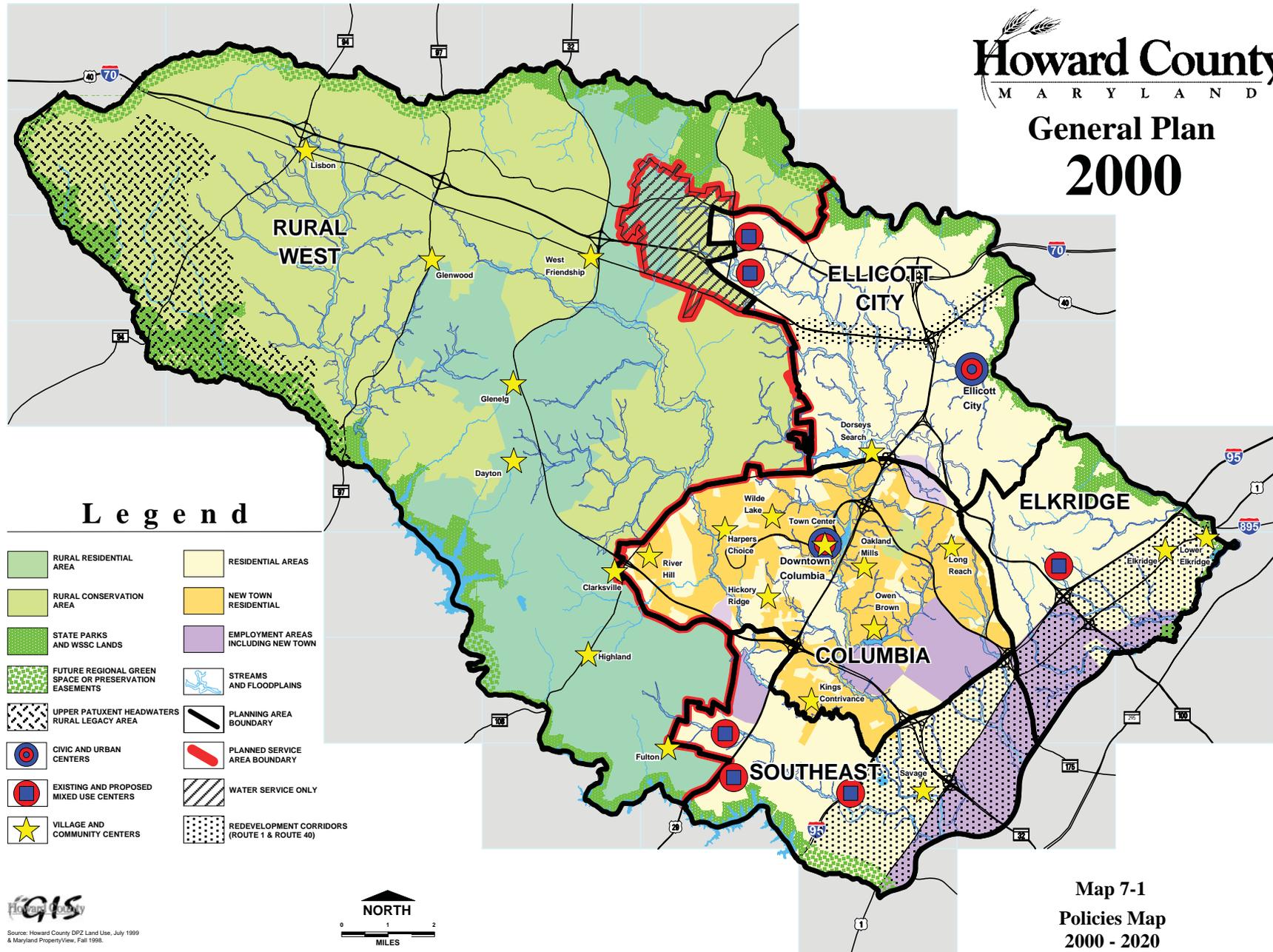
- Over the last reporting period, almost 1 million square feet of building space were approved in site development plans. Building permits were issued for about 1.1 million square feet. (Chart 3).
- As shown in Chart 4, there has been a steady annual slowdown in non-residential construction activity from around 3 million square feet in the 2005/06 year. The latest 15 month reporting period (10/09 through 12/10) had about the same amount of square feet in issued building permits compared to the previous period (10/08 through 9/09).
- Over the last five years (and a quarter), there was an annual average of 1.6 million square feet in approved site development plans and 1.7 million square feet in issue building permits.

- Most of the new building space constructed is located in the Southeast and Ellicott City. Comparably less space is located in ElkrIDGE, Columbia and the Rural West.
- As of December 31, 2010, there were 1.1 million square feet in-process in site development plans. This is 35% less than the 1.7 million square feet in process the previous year, pointing out declining pipeline activity.
- According to the State Department of Labor, Licensing and Regulation, the County lost 1,100 jobs last year (1st quarter 2009 to 1st quarter 2010 statistics), almost a 1% annual decline. This is on top of 5,300 jobs lost the previous year (1st quarter 2008 to 1st quarter 2009).



Howard County M A R Y L A N D

General Plan 2000



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



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. Howard County reported this for the first time last year. Thus it will be included in this report next year.) 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. By July 2011 local jurisdictions will be required to include the smart growth measures and indicators. The DMS report, issued annually by DPZ for the last 19 years as required by the county's 1992 APFO law, already includes most of what is required per the State law and are part of the previous sections of this report. There are some additional items, however, that were not included. The purpose of this section is to cover these 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.

Another key reporting requirement is residential development density that occurred during the last calendar year both inside and outside the 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

There were two General Plan amendments approved in Howard County during 2010. An additional General Plan Element was also approved. These are listed below.

CB-58-2009 – Downtown Columbia

To amend the General Plan to provide for a sustainable, diverse, pedestrian-friendly and mixed-use downtown in Columbia. The General Plan Amendment adopted in tandem with the zoning regulation amendment includes new concepts for affordable housing, multi-modal transportation, distinct neighborhoods, sustainability, environmental restoration, cultural facilities and programs, and public art.

During 2010, the Howard County Green Buildings Law, Adequate Public Facilities Act, and the Design Advisory Panel act were updated to implement the provision of CB-58-2009.

CB-9-2010 – Planned Service Area Expansion, Doughoregan Manor

To amend the General Plan by adjusting the Planned Service Area boundary of the Master Plan for Water and Sewerage for water and sewer service to include approximately 221.1 acres of the historic Doughoregan property located south of Frederick Road (Md Route 144) and west of the Kiwanis-Wallis Park, in Ellicott City.

CB-10-2010 – Water Resource Element

To amend the General Plan adopting the Howard County Water Resources Element in accordance with State law.

Zoning Regulation Amendments

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County during 2010.

ZRA-113 – Mary Kay Sigaty, councilperson, for General Growth Properties, Inc.

Zoning Regulation Amendments to allow new development of up to 5,500 new dwelling units, 1.25 million square feet of new retail, 4.3 million square feet of new office uses, 640 new hotel rooms and a variety of new community and cultural uses to be constructed in Downtown over the next 30 years.

ZRA-114 – Tim Keane

Zoning Regulation Amendment to amend Section 103.B.122, the definition for Neighborhood Preservation Parcel, to add provisions allowing unimproved properties to also be Neighborhood Preservation Parcels.

ZRA-118 – MDG Companies, Agent for the Owner

Zoning Regulation Amendments to amend Section 127.2, the CE (Corridor Employment) District to increase the flexibility of uses within this zone in the Route 1 corridor by increasing the amount of first floor retail in office buildings and to decrease the minimum size of parcels within the zone permitting uses allowed in larger CE zone properties.

ZRA-122 – Forest Venture II, LLC

Zoning Regulation Amendments to permit residential dwelling units in the B-1 and B-2 Districts to comprise up to a maximum of 50 percent of the floor area of a structure provided the dwelling units are located above the first floor level.

ZRA-126 – Kimberly Harbin Taylor and Michael Taylor

Zoning Regulation Amendment to amend Section 131 Conditional Uses to establish a new use category, “Farmer’s Market and Produce Stand”, as a new Section 131.N.21.

ZRA-127 – Marsha S. McLaughlin, Director, Department of Planning and Zoning

To amend Section 122.B of the Zoning Regulations to add the use category Special Hospitals - Psychiatric as a use permitted as a matter of right in the M-1 District.

ZRA - 129 – Calvin B. Ball, Councilperson

1. To amend Section 128.A (Supplementary Zoning District Regulations) to create new subsections to add Small Wind Energy Systems in certain zoning districts as a permitted accessory use;
2. To amend Section 131.N (Conditional Uses) to create new subsections to permit Small Wind Energy Systems in certain zoning districts as a Conditional Use;
3. To amend Sections 104, 105, 107, 108, 109, 110, 111, 112, 113.3, 115, 116, 117.1, 117.2, 117.4, 118, 119, 120, 122, 123, 126, 127.2, 127.4, and 127.5 to permit Small Wind Energy Systems as accessory and/or Conditional Uses in these zoning districts and in the NT District.

Zoning Map Amendments

The following highlights all zoning map amendments including the amendment number, name, and description that were approved in Howard County during 2010. Map 13 shows the location of each.

ZB 1082M – Highland Holding LLC

To rezone 3.06 acres at the south side of Highland Road approximately 600 feet northwest of MD 108 from the RR-DEO (Rural Residential – Density Exchange Option Overlay) District designation to the BR (Business: Rural) District.

ZB 1084M – Forest Venture II, LLC

To rezone 1.37 acres at the south side of US 40 approximately 900 feet east of Centennial Lane/Bethany Lane from the R-20 (Residential: Single) District to the B-1 (Business: Local) District.

ZB 1086M – Preston Capital Management, Inc.

To rezone 122 acres at the west side of Coca Cola Drive approximately 1,375 feet northeast of MD 100 and the northeast corner of the Park Circle Drive intersection with Coca Cola Drive from the M-2 (Manufacturing: Heavy) District designation to the TOD (Transit Oriented Development) District.

ZB 1087M – Camilla Carroll, Philip D. Carroll

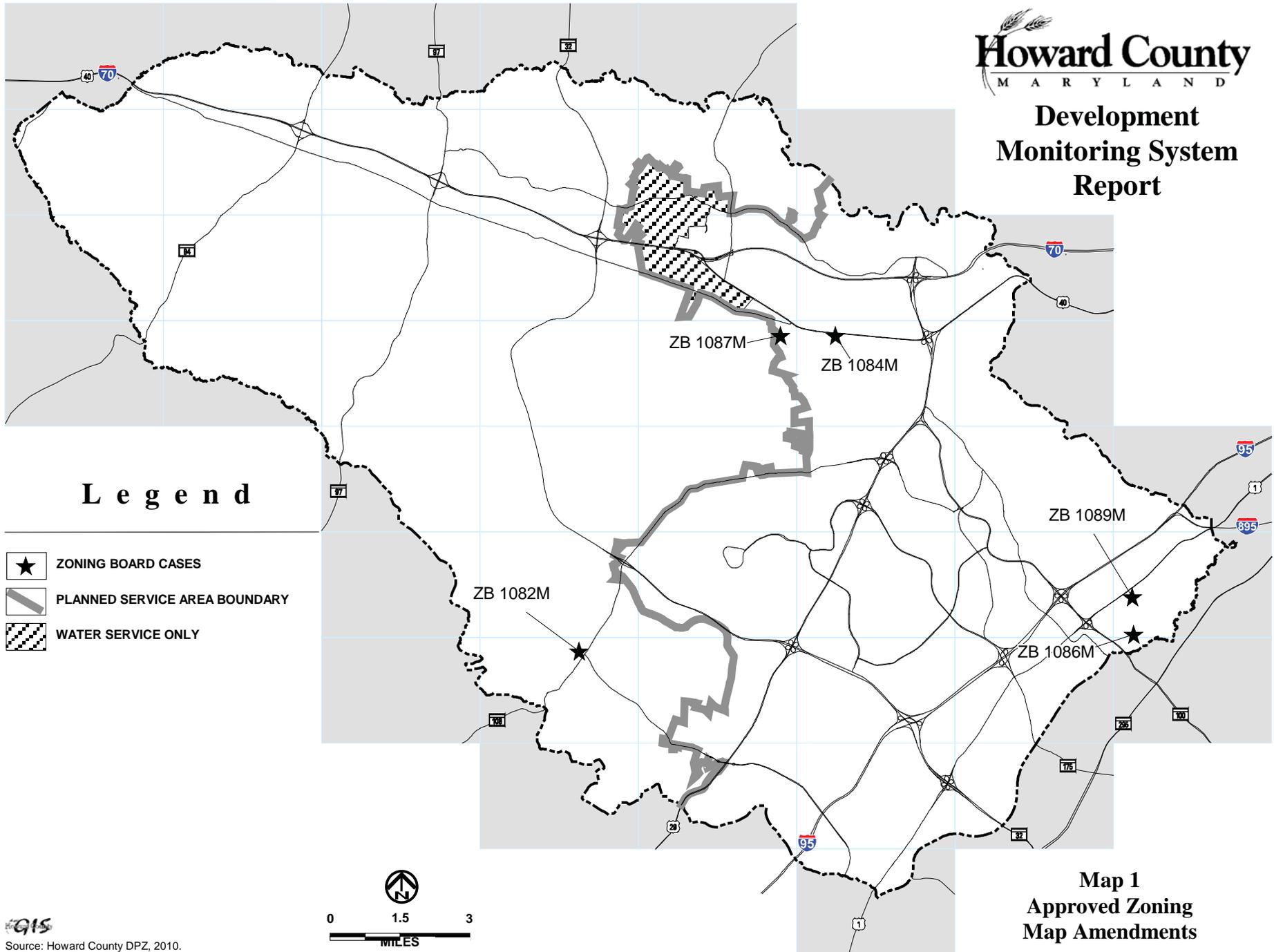
To rezone 221.1 acres at the south side of MD 144 approximately 1,300 feet west of US 40 from the RC-DEO (Rural Conservation-Density Exchange Option Overlay) District designation to the R-ED (Residential: Environmental Development) District.

ZB 1089M – HH Land, LLC

To rezone 11,012.5 square feet at the east side of Loudon Avenue approximately 210 feet northwest of Highland Avenue from the CE-CLI (Corridor Employment-Continuing Light Industrial) District designation to the R-12 (Residential: Single) District.



Development Monitoring System Report



Legend

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

Map 1
Approved Zoning
Map Amendments

GIS
Source: Howard County DPZ, 2010.

Subdivision & Land Development Regulation Amendments

The following highlights all Subdivision and Land Development Regulation amendments that were adopted in Howard County during 2010.

CB-15-2010 – Design Advisory Panel, Downtown Columbia

Update Subtitle 15 of the Howard County Subdivision and Land Development Regulations to add a requirement for the Design Advisory Panel (DAP) to review and provide design advice for the new Downtown Columbia revitalization development plans.

CB-38-2010 – Design Advisory Panel, Route 40

Update Subtitle 15 of the Howard County Subdivision and Land Development Regulations to add a requirement for the Design Advisory Panel (DAP) to review and provide design advice for the development of parcels located within the Route 40 corridor as defined in the Route 40 Manual.

CB-47-2010 – Roads APFO, Downtown Columbia

Update Subtitle 11 of the Howard County Subdivision and Land Development Regulations to expand adequate road facilities testing to include pedestrian and bicycle provisions and mitigation provisions, and new housing unit allocations applicable for the new Downtown Columbia revitalization development plans.

CB-13-2010 – Stormwater Management Regulations

Pursuant to the Maryland Stormwater Management Act of 2007, amending certain stormwater management regulations in the Howard County Code; clarifying certain goals; defining certain terms; amending certain definitions; proving that new regulations shall apply to certain projects; requiring certain stormwater management measures and certain design criteria; requiring certain plans including an Environmental Concept Plan; requiring that certain plans be approved before certain permits can be issued; providing a process for certain stormwater management alternative compliance and stormwater management waivers; requiring certain sureties; amending certain inspection authority in accordance with changes to the Howard County Design Manual; making certain technical corrections and reorganizing certain sections; and generally related to stormwater management in Howard County.

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2010, 6.13 miles of new or extended roadways were constructed in Howard County. Of this total, 5.81 miles were built in new subdivisions as part of developer's agreements executed with the County and .32 miles were built by the developer and paid by Howard County through the capital project process. Private road takeover accounted for .50 miles for a total of 6.63 additional miles. 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 purchased 8 fixed route diesel electric hybrid vehicles for the Howard Transit system, continuing an aggressive vehicle replacement that began in 2009. A master vehicle replacement schedule was updated and includes the purchase of diesel-electric hybrid vehicles for both the fixed route and paratransit systems.

New Schools, School Renovations and Additions to Schools

The Howard County Public School system has reported that there were no new schools or additions completed in calendar year 2010. Furthermore, no major renovations were completed. The school system has indicated that there are a number of projects currently underway, however. These projects, once completed, will be reported in future reports.

Note that last year's report summarized several additions that were completed, most of which were related to the final group of expanded elementary schools to accommodate all day Kindergarten. All elementary schools in Howard County have now fully incorporated all day Kindergarten. This was a major undertaking with construction taking place over 4 years adding a total of 58 classrooms to 28 elementary schools.

Other Community Facilities

There were several other community facilities under construction in 2010 including the new Miller Library in Ellicott City, the North Laurel Community Center and the major renovation of the Howard County government campus in Ellicott City. The one major facility that was completed and received a certificate of occupancy in 2010 was a new fire station building which is to serve as the West Friendship Fire Station replacement.

Consistency

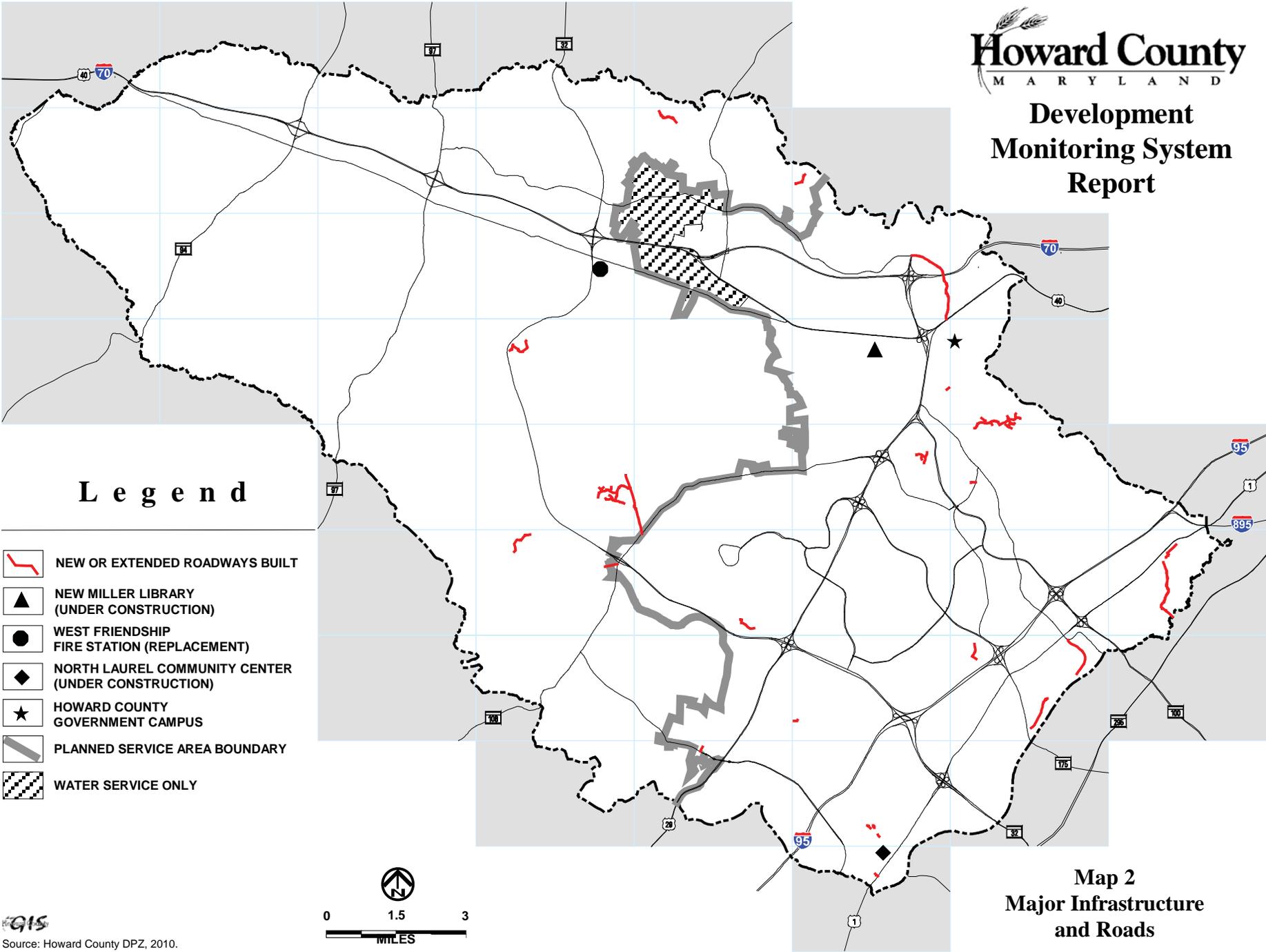
The Smart, Green and Growing Legislation requires that development patterns and infrastructure improvements that have occurred over the last year be evaluated for consistency with adopted local plans. An evaluation of whether these changes are consistent with each other as well as the adopted plans of 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, with the passage in 2010 of amendments to the General Plan and zoning regulations to create the framework for further higher density mixed-use development in Downtown Columbia, the county is able to provide for housing and employment opportunities in a compact, well-designed urban form in a central area already supported by existing infrastructure and services, while at the same time improving stormwater management and providing enhanced public amenities. This perhaps is an ideal example of achieving County and State goals alike.



Development Monitoring System Report



Legend

-  NEW OR EXTENDED ROADWAYS BUILT
-  NEW MILLER LIBRARY (UNDER CONSTRUCTION)
-  WEST FRIENDSHIP FIRE STATION (REPLACEMENT)
-  NORTH LAUREL COMMUNITY CENTER (UNDER CONSTRUCTION)
-  HOWARD COUNTY GOVERNMENT CAMPUS
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

Map 2
Major Infrastructure
and Roads

GIS
Source: Howard County DPZ, 2010.

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 2010. 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 2010 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 2010, 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 Elkridge at 20.44 units per acre based on 432 units built. This was followed by the Southeast at 11.65 units per acre, and then Ellicott City at 8.29 units per acre. Columbia saw an average net density of 6.69 units per acre in 2010. The Rural West, as expected, had the lowest average net density at 0.83 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 12.86 units per acre. This compares to a much smaller net density of 0.83 units per acre outside the PFA.

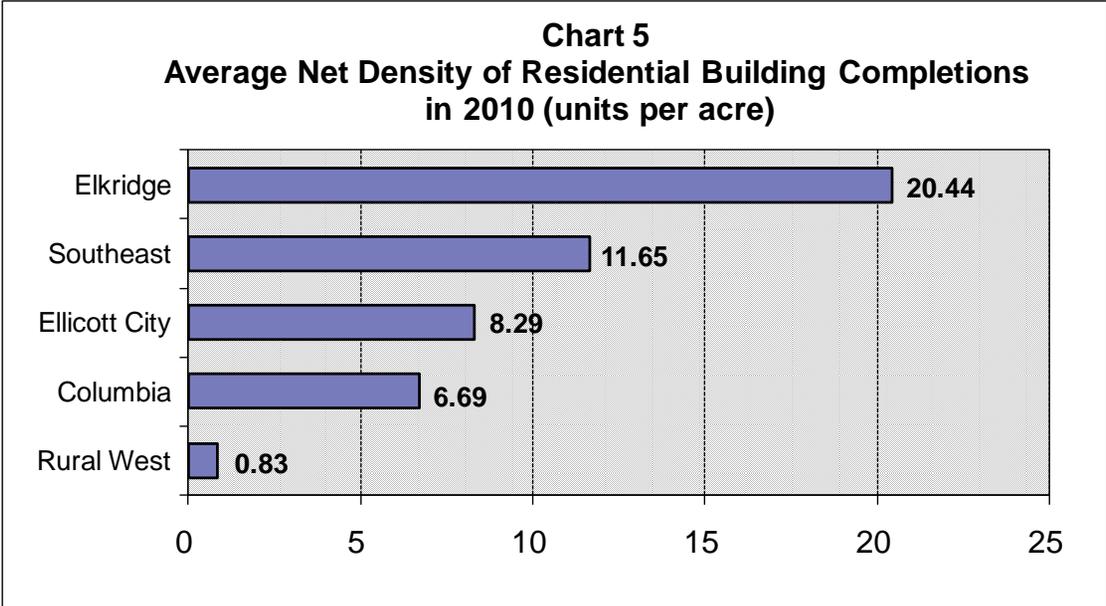
Map 3 shows the location of the completed units and also the relative densities. The map includes the PFA line. It is clear from the map that greater densities are being achieved inside the PFA. For more detail and an interactive map experience, please click on the following link: [Net Density of Growth](#).

Table 1
Density of Units Built in 2010 - By Planning Area

Planning Area	Units		Total Net Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Columbia	103	7%	19	4%	6.69
Elkridge	432	31%	37	7%	20.44
Ellicott City	520	37%	81	16%	8.29
Rural West	137	10%	333	66%	0.83
Southeast	220	16%	31	6%	11.65
TOTAL	1,412	100%	500	100%	11.69

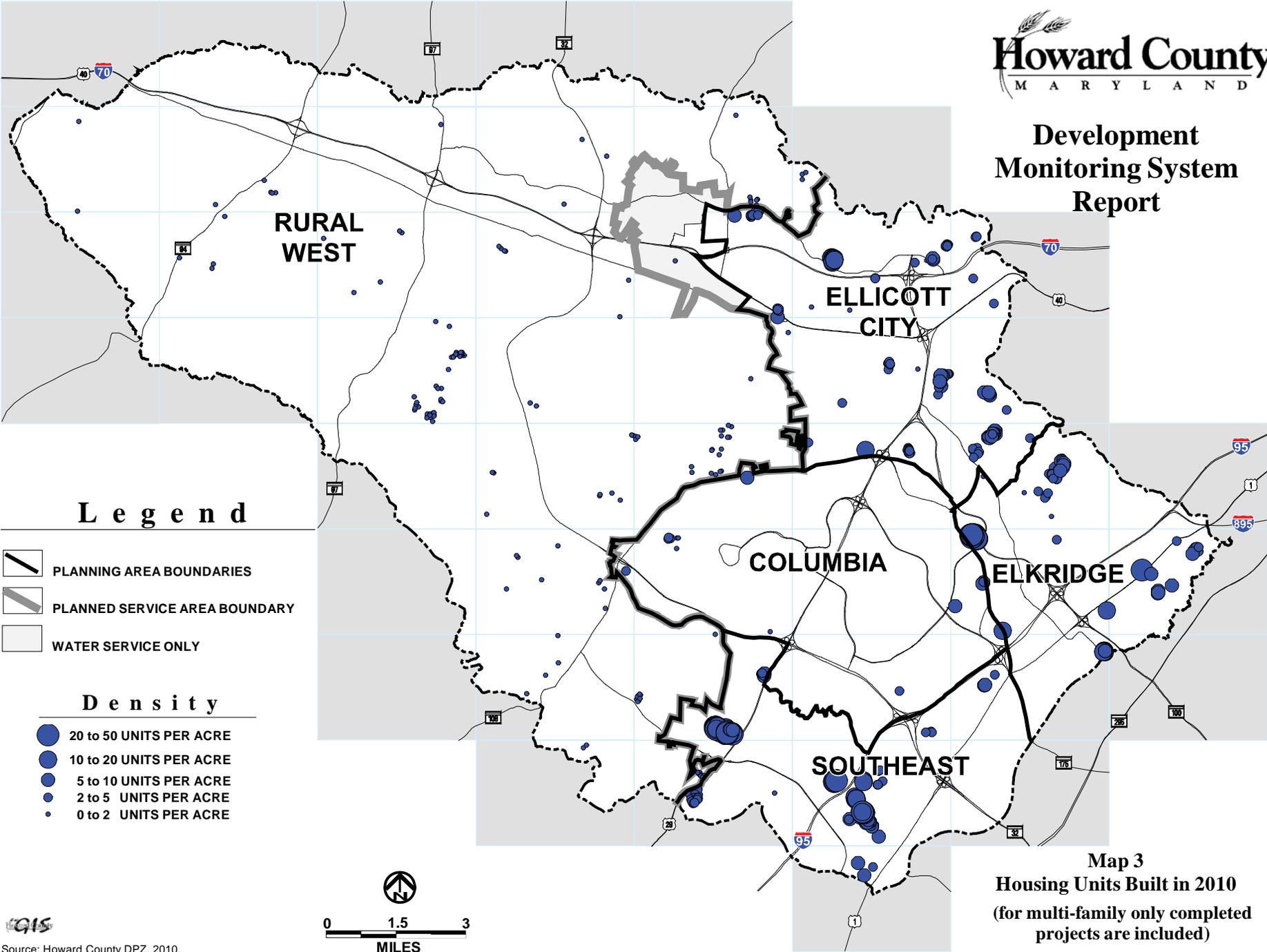
Table 2
Density of Total Units Built in 2010 - Inside vs. Outside PFA

Planning Area	Units		Net Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,275	90%	168	34%	12.86
Outside PFA	137	10%	333	66%	0.83
TOTAL	1,412	100%	500	100%	11.69





Development Monitoring System Report



Source: Howard County DPZ, 2010.

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 early 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 goal based on current General Plan policy to the year 2020 over the next 10 years. A total of 1,500 units are allocated to areas outside the PFA, representing only 7.8% of all units county-wide. The remaining 92.2% of units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2010 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 7.8% 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 Goal
(2011 to 2020 - Including GP Amendments)

Inside PFA	17,796	92.2%
Outside PFA	1,500	7.8%
Total	19,296	100.0%

Table 4
Total Built Units in Howard County
September 30, 2010

Inside PFA	93,617	87.4%
Outside PFA	13,532	12.6%
Total	107,149	100.0%

Table 5
Total Units by 2020 based on GP Policy

Inside PFA	111,413	88.1%
Outside PFA	15,032	11.9%
Total	126,445	100.0%

Resources to Achieve Goal

Besides the County's APFO described above that regulates the timing and location of growth, the Agricultural Land Preservation Program, described in detail beginning on Page 48 of this report, also helps reduce development capacity outside of the PFA while preserving land. The County's rural zoning is an additional mechanism preserving environmental or agricultural easements in place of housing units through a density transfer mechanism. 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 and 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 2005, 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 October 1, 2009 through December 31, 2010 there was potential for 979 housing units from recorded lots countywide in 126 subdivision plans totaling 1,793 acres (Table 6). Ellicott City had the most with 248 units, 25% of the total. The Southeast had potential for 245 units, also about 25% of the total. There were 239 units in recorded subdivision plans in Elkridge (24%). Columbia had 200 units (20%) and the Rural West had 47 (5%). These represent net new unit potential

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

Of the total 1,793 acres recorded, 924 acres, or about 52%, 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.

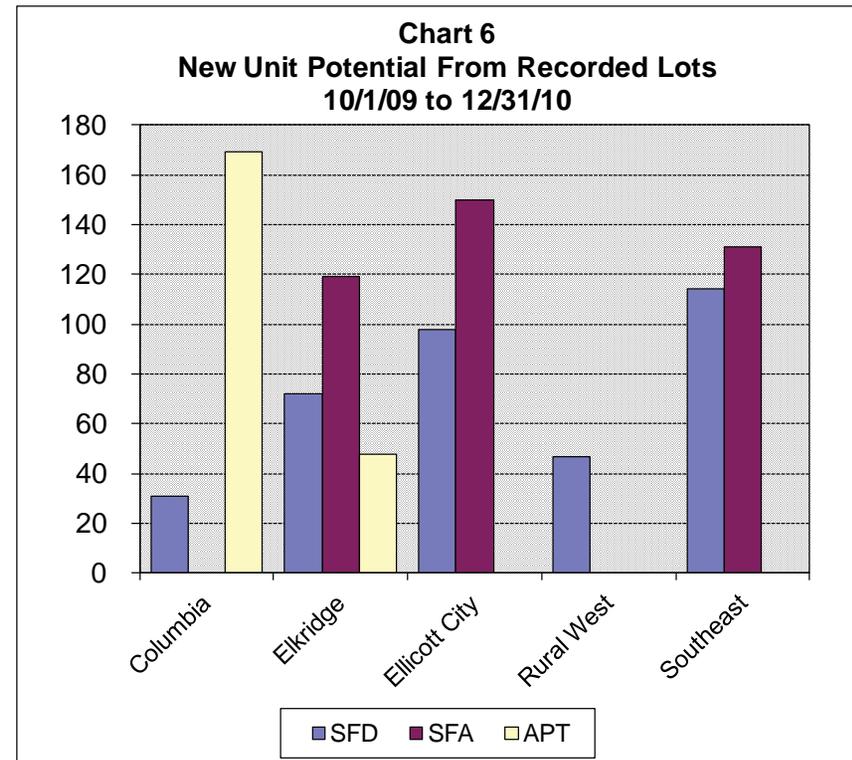
Table 7 shows new units from recorded lots by unit type. Of the 979 units from recorded lots, 362 are for single family detached units (SFD), 400 are for single family attached or townhouse units (SFA) and 217 are for apartment units. This represents 37%, 41% and 22% of the total units, respectively. Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions, 10/01/09 to 12/31/2010

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	200	20%	10	8%	60	3%
Elkridge	239	24%	26	21%	192	11%
Ellicott City	248	25%	31	25%	436	24%
Rural West	47	5%	27	21%	924	52%
Southeast	245	25%	32	25%	181	10%
TOTAL	979	100%	126	100%	1,793	100%

Table 7
Unit Potential from Recorded Lots by Unit Type, 10/01/09 to 12/31/2010

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	31	0	169	0	200	20%
Elkridge	72	119	48	0	239	24%
Ellicott City	98	150	0	0	248	25%
Rural West	47	0	0	0	47	5%
Southeast	114	131	0	0	245	25%
TOTAL	362	400	217	0	979	100%
PERCENT	37%	41%	22%	0%	100%	



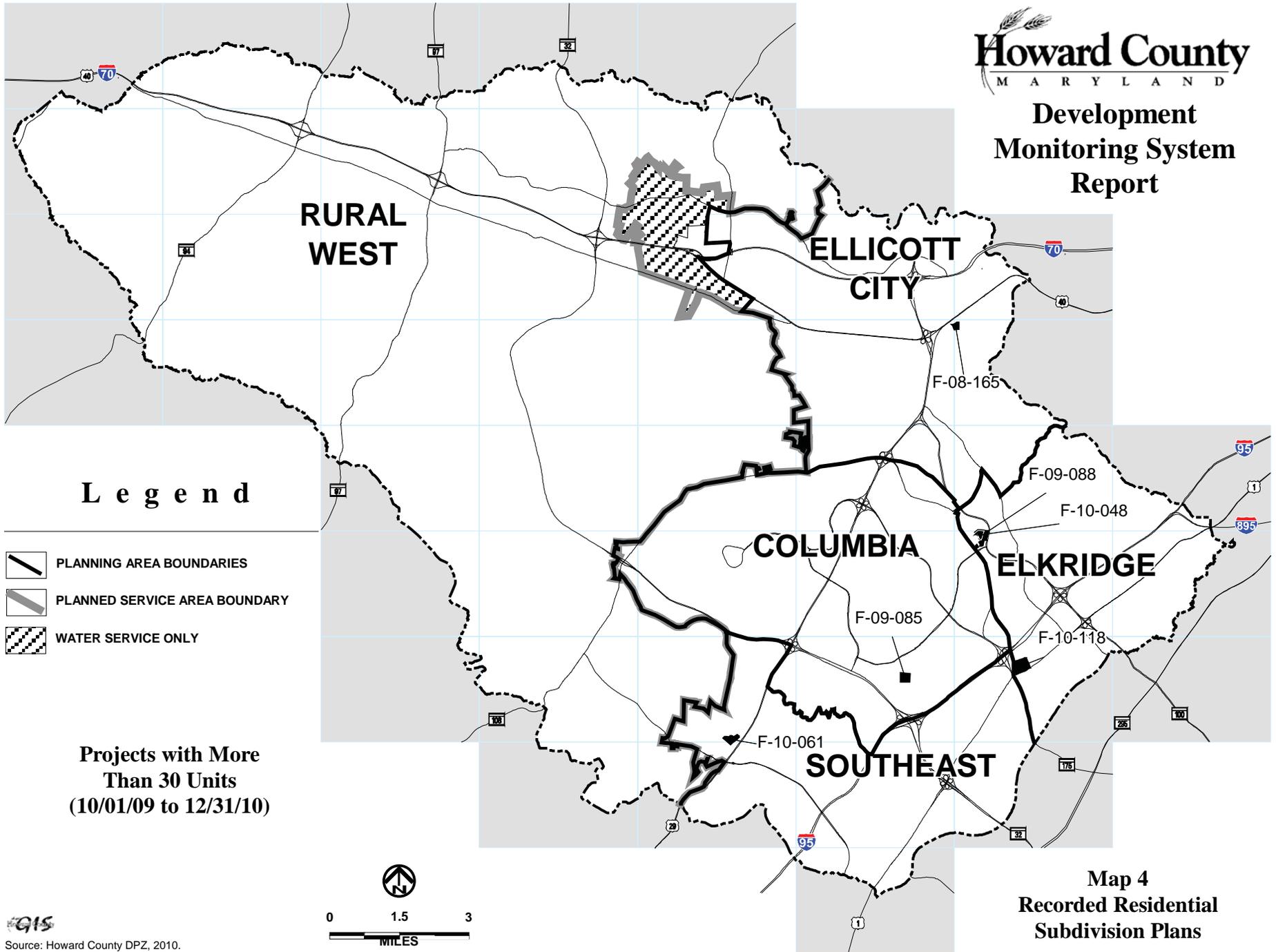
Last Year's Projects - Greater than 30 Units

Of the total 979 units from lots recorded for the latest reporting period, 642 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 Maple Lawn in the Southeast, Howard Square and Shipley's Grant in Elkridge, Guilford Gardens in Columbia, and Alta at Regency Crest in Ellicott City.



Development Monitoring System Report



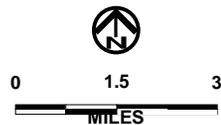
Legend

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

Projects with More Than 30 Units (10/01/09 to 12/31/10)



Source: Howard County DPZ, 2010.



**Map 4
Recorded Residential
Subdivision Plans**

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/09 to 12/31/10

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Columbia	F-09-085	Guilford Gardens	APT & MIHU APT (some Age-Res.)	169	169
Elkridge	F-10-118	Howard Square	SFA & MIHU SFA	43	176
	F-09-088	Shipley's Grant - Phase 4	SFA, APT & MIHU APT	65	
	F-10-048	Shipley's Grant - Phase 5	SFA & MIHU SFA	68	
Ellicott City	F-08-165	Alta at Regency Crest	SFA - Age Restricted	150	150
Southeast	F-10-061	Maple Lawn Farms	SFD & SFA	147	147
TOTAL					642

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in October 1, 2005. (Note there is an extra quarter included due to the change in the analysis timeframe.) Over this time period lots for 6,425 units countywide in 775 subdivision plans totaling 25,528 acres were recorded. This equates to an annual average of 1,224 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 2,276 single family detached units, 35% of the total 6,425. A total of 1,742, 27%, were for single family attached units and the remaining 2,407, 37%, 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, 10/01/05 to 12/31/10

Year	Units	Plans	Acreage
10/05 to 9/06	859	170	3,943
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	6,869
10/09 to 12/10 *	979	126	1,793
TOTAL	6,425	775	25,528
ANNUAL AVG.	1,224	148	4,862

* Extra quarter included due to change in analysis timeframe

Table 10
Unit Potential From Recorded Lots by Unit Type, 10/01/05 to 12/31/10

Year	SFD	SFA	APT	MH	Total
10/05 to 9/06	439	276	144	0	859
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
TOTAL	2,276	1,742	2,407	0	6,425
PERCENT	35%	27%	37%	0%	100%
ANNUAL AVG.	434	332	458	0	1,224

* 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, 2010 are tabulated and compared with those in process the prior year (as of September 30, 2009).

Number of Plans

Twenty-four less residential plans were in process as of December 31, 2010 than there were one year earlier – 190 plans in 2010 compared to 214 plans in 2009 (Table 11).

For the current year, the Rural West had the greatest number of residential plans in process with 63, followed by the ElkrIDGE with 50. Ellicott City and the Southeast had 39 and 24 plans in process, respectively. Columbia had 14 plans in process.

Of the 190 plans in process on December 31, 2009, 140 were final plans, 12 were environmental concept plans, 12 were sketch plans, 24 were preliminary equivalent sketch plans and two were preliminary plans.

Number of Potential Units

There were more units in process as of December 31, 2009 compared to the previous year – 8,108 units compared to 7,338 units (Table 12).

It is important to note that a significant number of the 8,108 potential units in process are part of phased projects with building planned for future

Table 11
Number of Residential Subdivision Plans in Process, 12/31/2010
(With comparisons to Countywide total as of 09/30/09)

Planning Area	Environmental Concept	Preliminary Equivalent		Final	TOTAL PLANS	
		Sketch	Sketch			
Columbia	1	0	1	0	12	14
ElkrIDGE	2	7	10	1	30	50
Ellicott City	4	3	2	1	29	39
Rural West	4	0	8	0	51	63
Southeast	1	2	3	0	18	24
TOTAL	12	12	24	2	140	190
As of 09/30/09	NA *	13	31	9	161	214

* Environmental Concept Plans (ECP) first required June, 2010.

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, 6,098 units are part of phased plans, with building planned as far out as 2020 (in the case of ElkrIDGE Village Centre, now known as Howard Square). This represents 75% of the total units in process.

The larger phased projects include Maple Lawn Farms, Westover Glen and Laurel Park Station in the Southeast; The Overlook at Blue Stream, Howard Square, Village Towns, and Shipley's Grant in ElkrIDGE; Turf Valley, Autumn River and the Courtyards in Ellicott City; and Riverdale in Columbia.

As reflected in Table 12, 28% of the units in process are single family detached units. About 26% are single family attached units and 46% 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, 12/31/10
 (With comparisons to Countywide total as of 09/30/09)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	60	150	112	0	322
Elkridge	408	892	1,814	0	3,114
Ellicott City	568	704	584	0	1,856
Rural West	592	0	0	0	592
Southeast	653	327	1,244	0	2,224
TOTAL	2,281	2,073	3,754	0	8,108
PERCENT	28%	26%	46%	0%	100%
As of 09/30/09	2,187	2,095	3,056	0	7,338

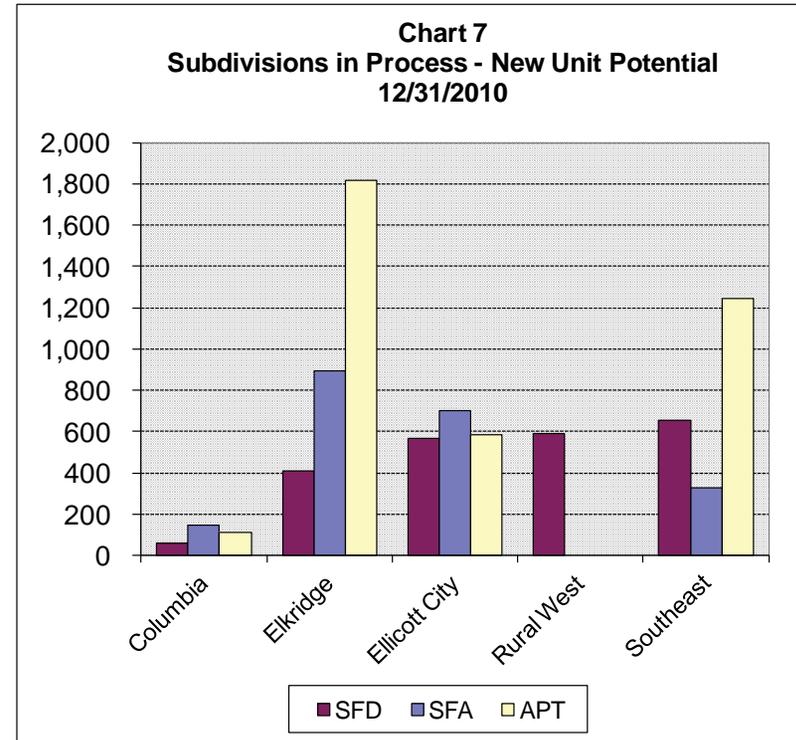


Table 13
Potential Units from Phased Projects

Planning Area	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	TOTAL
Columbia	0	20	40	80	70	52	0	0	0	0	262
Elkridge	380	278	238	250	219	290	266	266	150	150	2,487
Ellicott City	137	221	265	252	296	205	132	0	0	0	1,508
Southeast	0	53	478	395	406	330	41	0	0	0	1,703
Rural West	0	45	45	48	0	0	0	0	0	0	138
TOTAL	517	617	1,066	1,025	991	877	439	266	150	150	6,098

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, 12/31/10

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	0	150	112	0	262
Elkridge	35	425	738	0	1,198	174	0	0	0	174
Ellicott City	329	366	316	0	1,011	30	0	0	0	30
Rural West	0	0	0	0	0	176	0	0	0	176
Southeast	336	161	1,063	0	1,560	197	49	0	0	246
TOTAL	700	952	2,117	0	3,769	577	199	112	0	888

Planning Area	Preliminary					Final					TOTAL - 12/31/10				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	60	0	0	0	60	60	150	112	0	322
Elkridge	0	0	161	0	161	199	467	915	0	1,581	408	892	1,814	0	3,114
Ellicott City	0	0	122	0	122	209	338	146	0	693	568	704	584	0	1,856
Rural West	0	0	0	0	0	416	0	0	0	416	592	0	0	0	592
Southeast	0	0	0	0	0	120	117	181	0	418	653	327	1,244	0	2,224
TOTAL	0	0	283	0	283	1,004	922	1,242	0	3,168	2,281	2,073	3,754	0	8,108

Number of Acres

As of December 31, 2010 a total of 5,879 acres of residential land were in the subdivision process. This is 758 acres less compared to the previous year, at which time there were 6,637 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 or phased projects. Map 5 shows the location of these projects. Some of the larger projects in this list include The Overlook at Blue Stream, Howard Square, Turf Valley, The Courtyards at Waverly Woods, Walnut Creek, Laurel Park Station, Maple Lawn Farms, and Wincopia Farms. These major projects include 6,928 units which account for about 85% of the total 8,108 units in the subdivision process.

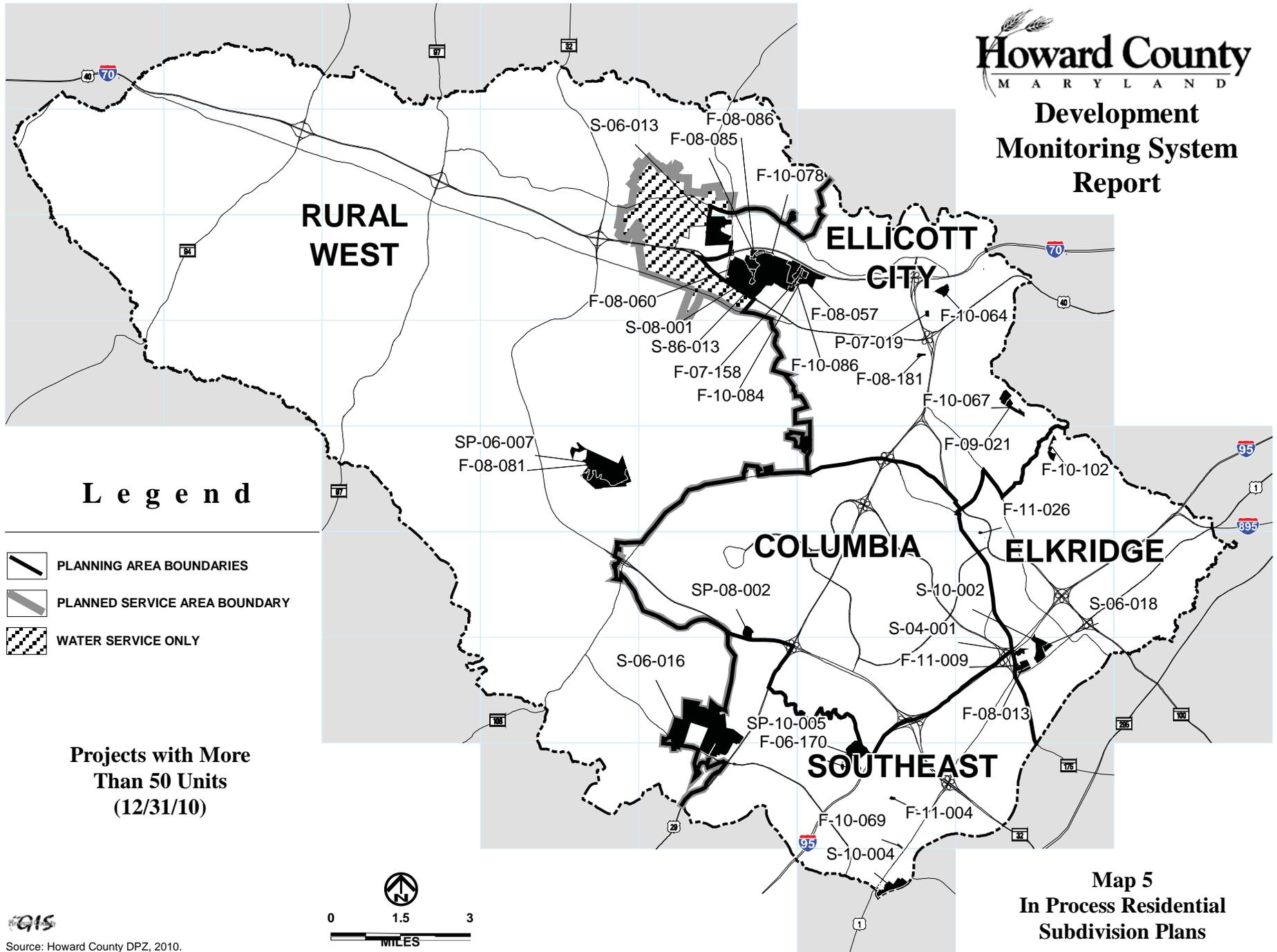
Table 15
Acreeage of Residential Subdivision Plans in Process, 09/30/10
(With comparisons to Countywide total as of 12/31/10)

Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Columbia	0	29	0	31	60
Elkridge	218	169	76	359	822
Ellicott City	249	16	10	559	834
Rural West	0	705	0	2,898	3,603
Southeast	324	141	0	95	560
TOTAL	792	1,060	85	3,942	5,879
As of 09/30/09	730	1,072	209	4,626	6,637

**Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/10**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SP-08-002	Riverdale	SFA, APT - 27 MIHU, 112 Age Rest.	262	262
Elkridge	S-06-018	The Overlook at Blue Stream	SFA, APT - 202 MIHU	1,345	
	F-08-013, F-11-009	Howard Square	SFA, APT - 252 MIHU	1,024	
	S-10-002	Morris Place	SFA - 28 MIHU	184	
	F-11-026	Shipley's Grant - Phase 6	SFA - 2 MIHU	51	
	S-04-001	Village Towns	APT	67	
	F-10-102	Locust Chapel	SFD	64	
Ellicott City	S-86-013	Turf Valley - Remaining Phases	SFD, SFA, APT	593	
	S-06-013	The Courtyards at Waverly Woods - West	SFD, SFA - Age Restricted	350	
	F-08-060/F-08-085,-86/F-10-078	Villages at Turf Valley	SFD, SFA, APT	177	
	S-08-001	Turf Valley Clubhouse	SFD, APT	128	
	P-07-019	The Meadows at Ellicott City III	APT, 15 MIHU	122	
	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	
	F-08-057	Vantage Condominiums at Turf Valley	APT	69	
	F-10-064	Rogers Property	SFD, SFA	68	
	F-08-181	Villas of Dunloggin	APT - Age Restricted, 6 MIHU	53	
Rural West	SP-06-007/F-08-081	Walnut Creek - Phase 2 to 4	SFD	138	138
Southeast	S-10-004	Laurel Park Station - Phases 1 to 4	APT, 150 MIHU	1,000	
	S-06-016	Maple Lawn Farms - Phases 8 to 12	SFD, SFA, APT	560	
	SP-10-005	Wincopia Farms	SFD, SFA	220	
	F-06-170	Westover Glen	APT, SFA - Age Restricted - 15 MIHU	143	
	F-10-069	Beechcrest Apartments	APT - 13 MIHU	64	
	F-11-004	Riverwalk	SFA - 6 MIHU	56	
TOTAL					6,928

**Development
Monitoring System
Report**



Legend

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

**Projects with More
Than 50 Units
(12/31/10)**



Source: Howard County DPZ, 2010.



**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. As such, SDP approval is 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 10/1/2009 thru 12/31/2010 there were 1,309 housing units approved in 72 site development plans totaling about 433 acres (Table 17). The Southeast had 448 approved units followed by Ellicott City with 406 units, Elkridge with 256 and Columbia with 199.

Table 18 shows new units from approved site development plans by unit type. Of the 1,309 approved units, 32% were for single family detached units, 44% were for single family attached or townhouse units and 25% for apartment units. Chart 8 shows these results graphically.

Table 18
Approved Units from SDP's by Unit Type, 10/01/2009 to 12/31/2010

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	30	0	169	0	199	15.2%
Elkridge	129	101	26	0	256	19.6%
Ellicott City	171	235	0	0	406	31.0%
Rural West	0	0	0	0	0	0.0%
Southeast	83	236	129	0	448	34.2%
TOTAL	413	572	324	0	1,309	100.0%
PERCENT	32%	44%	25%	0%	100%	

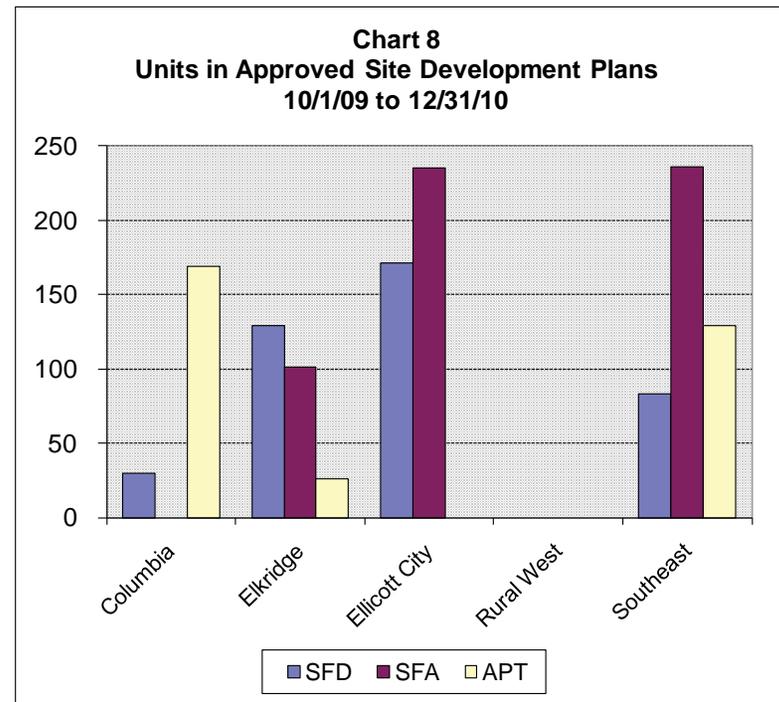


Table 17
Approved Residential Site Development Plans, 10/01/09 to 12/31/2010

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	199	15%	5	7%	26	6%
Elkridge	256	20%	28	39%	85	20%
Ellicott City	406	31%	18	25%	272	63%
Rural West	0	0%	0	0%	0	0%
Southeast	448	34%	21	29%	51	12%
TOTAL	1,309	100%	72	100%	433	100%

Last Year's Projects - Greater than 50 Units

Of the total 1,309 units approved in site development plans last year, 900 or about 69% were in site development plans 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, 2005 to December 31, 2010. Over this five and a quarter year period 6,807 units were approved countywide in 362 site development plans totaling about 1,365 acres.

The last reporting period saw an increase in approved units compared to the previous period - 1,309 units approved versus a significantly smaller 576 units approved.

Table 19
Approved Residential SDP's, Projects With More Than 30 Units, 10/01/09 to 12/31/2010

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-09-045	Guilford Gardens	APT, APT - Age Restricted - 29 MIHU	169	169
Elkridge	SDP-10-082	Shipley's Grant - Ph. 3 & 4	SFA	81	81
Ellicott City	SDP-09-039	Courtyards West - Ph. 2 & 3	SFD, SFA	150	300
	SDP-08-068	Alta at Regency Crest	APT - Age Restricted - 15 MIHU	150	
Southeast	SDP-10-013	The Enclave at Emerson	APT, SFA	164	350
	SDP-10-023	Emerson	SFA	86	
	SDP-10-063	Maple Lawn Farms - Hillside District	SFA	60	
	SDP-10-073	Maple Lawn Farms - Hillside District	SFA	40	
TOTAL					900

Table 20
Approved Units in Residential Site Development Plans, 10/01/05 to 12/31/10

Year	SFD	SFA	APT	MH	Total
10/05 to 9/06	337	359	290	0	986
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
TOTAL	1,637	2,470	2,661	39	6,807
PERCENT	24%	36%	39%	1%	100%
ANNUAL AVG.	312	470	507	7	1,297

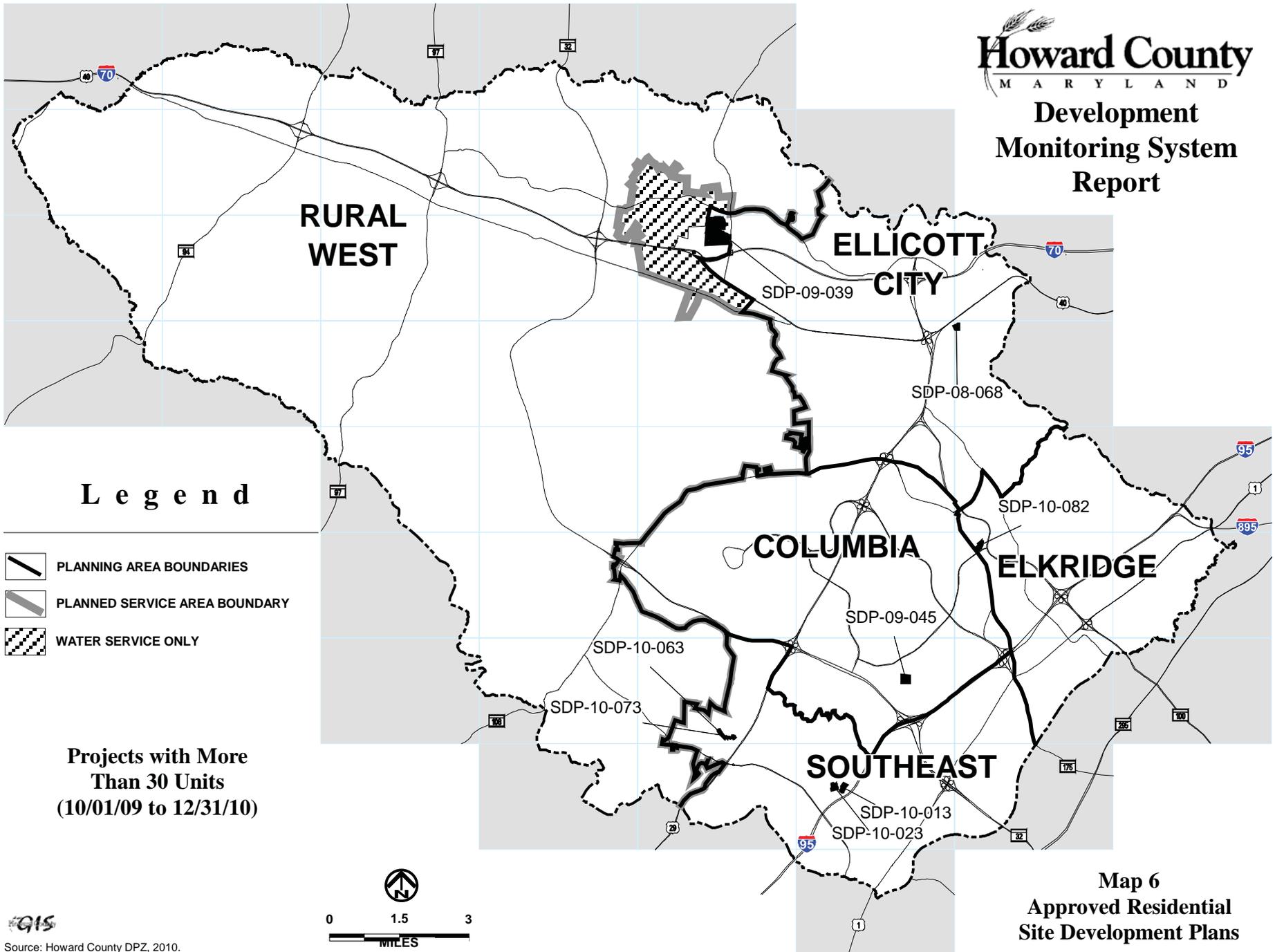
* Extra quarter included due to change in analysis timeframe

Table 21
Approved Residential Site Development Plans, 10/01/05 to 12/31/10

Year	Units	Plans	Acreage
10/05 to 9/06	986	79	215
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
TOTAL	6,807	362	1,365
ANNUAL AVG.	1,297	69	260

* Extra quarter included due to change in analysis timeframe

Howard County
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GIS
 Source: Howard County DPZ, 2010.

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, 2010 are tabulated and compared to those in process a year earlier (as of September 30, 2009). 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, 2010 compared to the prior reporting period, 43 plans compared to 36 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 09/30/09 & 12/31/10

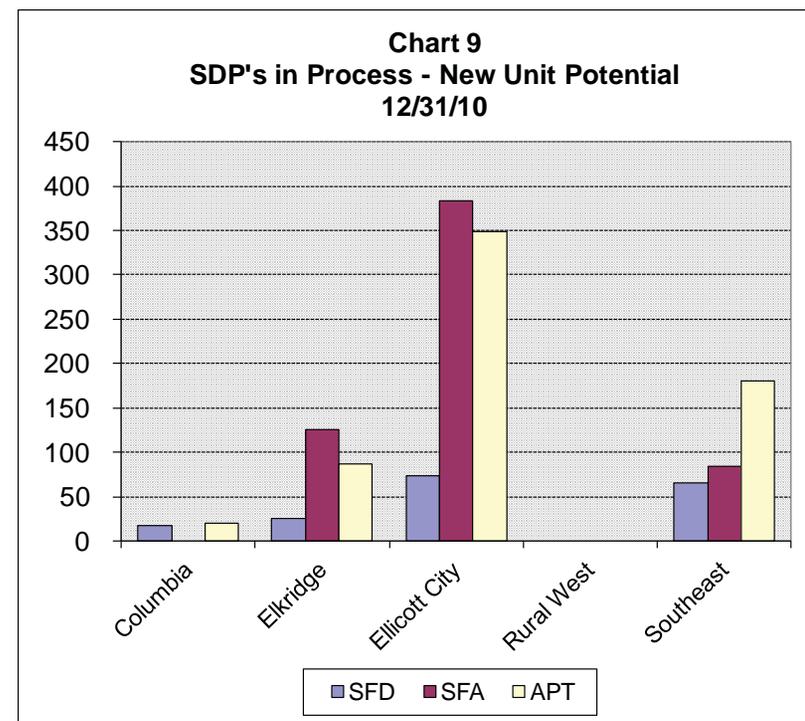
Planning Area	2010	2009
Columbia	5	4
Elkridge	14	15
Ellicott City	14	8
Rural West	0	0
Southeast	10	9
TOTAL	43	36

Number of Potential Units

There were less units in process as of December 31, 2010 compared to September 30 of the previous year, 1,406 units compared to 1,517 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 637 proposed units in 2010. This is followed by 586 proposed single family attached or townhouse units and 183 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, 12/31/10
(With comparisons to Countywide total as of 09/30/09)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	17	0	20	0	37
Elkridge	26	125	87	0	238
Ellicott City	74	383	349	0	806
Rural West	0	0	0	0	0
Southeast	66	84	181	0	331
TOTAL	183	592	637	0	1,412
As of 09/30/09	121	432	954	0	1,507



Number of Acres

As of December 31, 2010 a total of 355 acres of residential land were in the site development plan process. This is less than the previous year when there were 405 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects with 30 units or more. Map 7 shows the location of these projects. Of the 1,406 units in the site development plan process, 1,268 or about 90% were in projects with 30 units or more. More than half of the units in these larger projects are part of age-restricted developments.

Table 24
Acreege of Residential SDP's In Process, 09/30/09 & 12/31/10

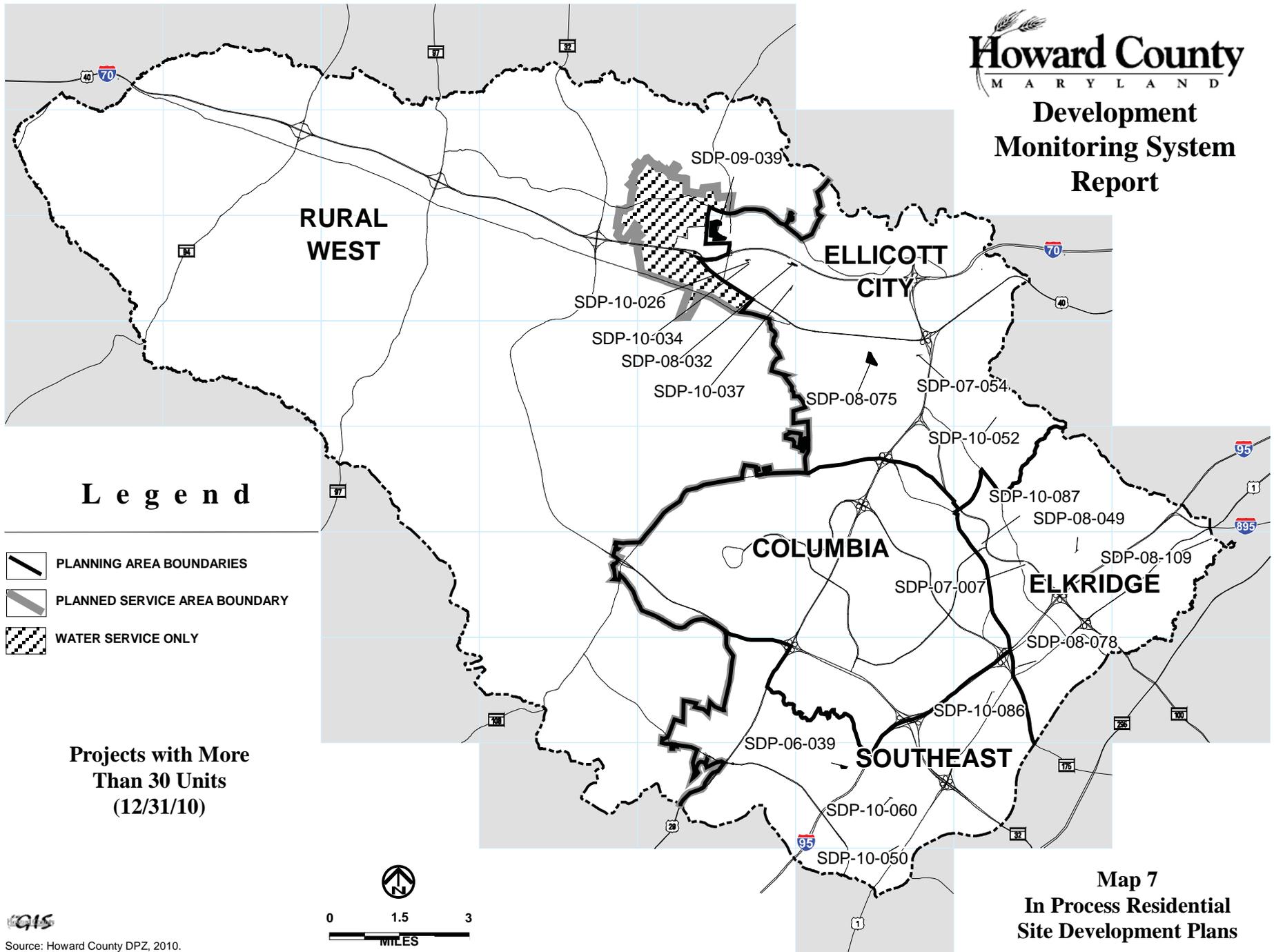
Planning Area	2010	2009
Columbia	14	26
Elkridge	43	44
Ellicott City	247	297
Rural West	0	0
Southeast	51	38
TOTAL	355	405

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/10

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	SDP-08-078	Howard Square	SFA - 13 MIHU	57	212
	SDP-08-109	Riverwatch	APT - 12 MIHU	47	
	SDP-10-087	Shipleys Grant	APT	40	
	SDP-08-049	Marshalee Woods	SFA Age Restricted - 5 MIHU	36	
	SDP-07-007	Fox Hunt Estates	SFA - 4 MIHU	32	
Ellicott City	SDP-08-075	Lutheran Village at Miller's Grant	SFA, APT - Age Restricted - 29 MIHU	284	764
	SDP-07-054	Villas of Dunloggin	SFA - Age Restricted - 6 MIHU	51	
	SDP-09-039	Waverly Woods - Courtyards West	SFD, SFA - Age Restricted	190	
	SDP-10-034/SDP-10-026	Villages at Turf Valley	SFA	86	
	SDP-10-052	Taylor Way, Village Crest	SFA, APT	58	
	SDP-10-037	Fairways at Turf Valley	SFA	47	
	SDP-08-032	Vantage Condominiums at Turf Valley	APT	48	
Southeast	SDP-10-050	Beechcrest Apartments	APT - 13 MIHU	64	292
	SDP-10-060	Riverwalk	SFA - 6 MIHU	56	
	SDP-10-086	Pleasant Chase	SFD	33	
	SDP-06-039	Westover Glen	SFA, APT - Age Restricted - 15 MIHU	139	
TOTAL					1,268



Development Monitoring System Report



Legend

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

**Projects with More
Than 30 Units
(12/31/10)**



Source: Howard County DPZ, 2010.



**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 October 1, 2009 to December 31, 2010, the County issued 1,833 residential building permits for new construction (Table 26). The Southeast had the greatest number issued with 588, followed by Ellicott City with 514 and then Columbia with 292. Countywide, 35% of the permits were for single family units. About 30% were for townhouse units and 35% for apartment units. Chart 10 shows these results graphically by planning area.

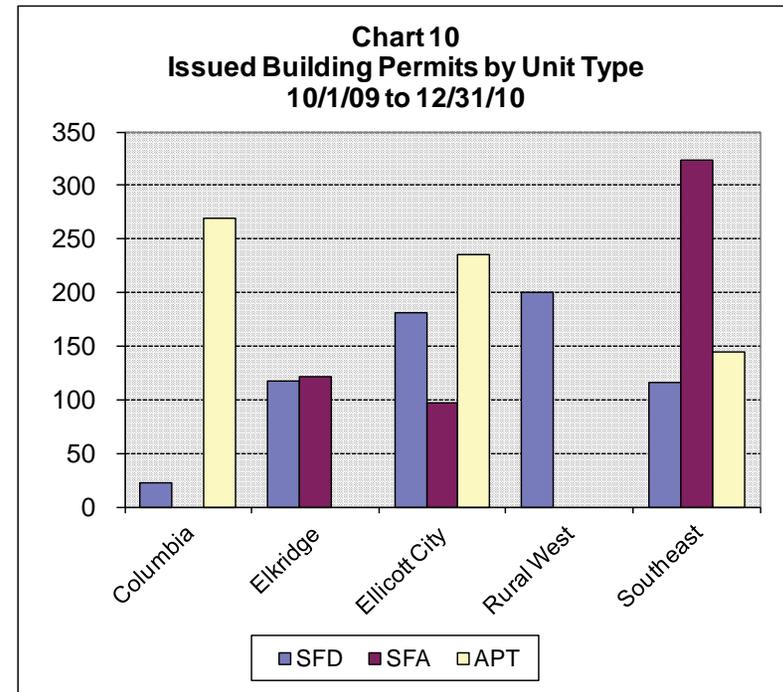


Table 26

Issued Residential Building Permits by Unit Type, 10/01/09 to 12/31/10

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	23	0	269	0	292	16%
Elkridge	117	121	0	1	239	13%
Ellicott City	181	97	236	0	514	28%
Rural West	200	0	0	0	200	11%
Southeast	116	323	145	4	588	32%
TOTAL	637	541	650	5	1,833	100%
PERCENT	35%	30%	35%	0%	100%	

Last Year's Projects - Greater than 25 Units

Table 27 summarizes the issued residential building permits in larger subdivisions with more than 25 units. About 65%, or 1,189 of the total 1,833 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, 2005 to December 31, 2010, a total of 7,600 residential permits have been issued in Howard County (Table 28). This is an average of 1,520 permits per year.

Of the 7,600 total permits issued over this time period, 2,395, or 32%, were for single family detached units. There were 2,537 permits (33%) for single family attached units and 2,604 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 25 Units, 10/01/09 to 12/31/10

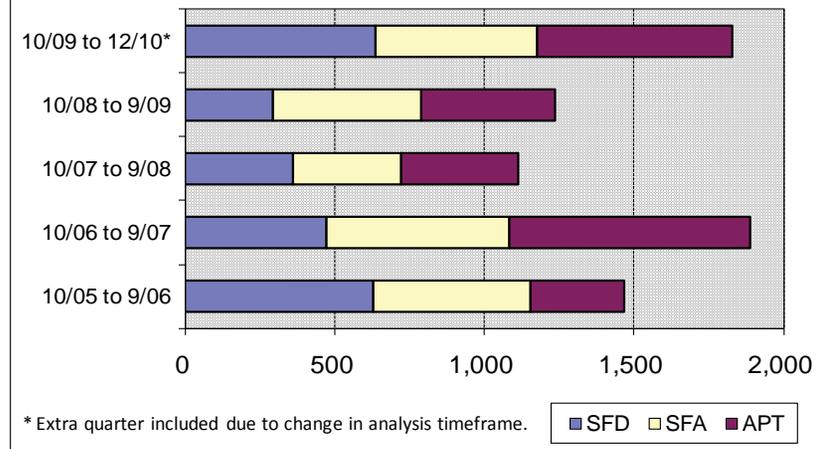
Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Guilford Gardens	Apartments	269	269
Elkridge	Shipley's Grant	Townhomes	71	97
	Village Towns	Townhomes	26	
Ellicott City	Alta At Regency Crest	Apartments-Age Restricted	150	391
	The Gatherings At Jefferson Place	Apartments-Age Restricted	54	
	Worthington Fields	Single-Family Detached	44	
	The Courtyards At Waverly Woods-East	Apartments-Age Restricted	32	
	Ellicott Square	Townhomes	31	
	Enclave At Ellicott Station	Townhomes-Age Restricted	29	
	Hearthstone At Ellicott Mills II	Townhomes-Age Restricted	26	
	The Woods of Tiber Branch II	Single-Family Detached	25	
Southeast	Emerson	Single-Family Detached/Townhomes/Apartments	224	432
	Maple Lawn Farms	Single-Family Detached/Townhomes	146	
	Mission Place	Townhomes	62	
TOTAL				1,189

Table 28
Issued Residential Building Permits by Unit Type, 10/01/05 to 12/31/10

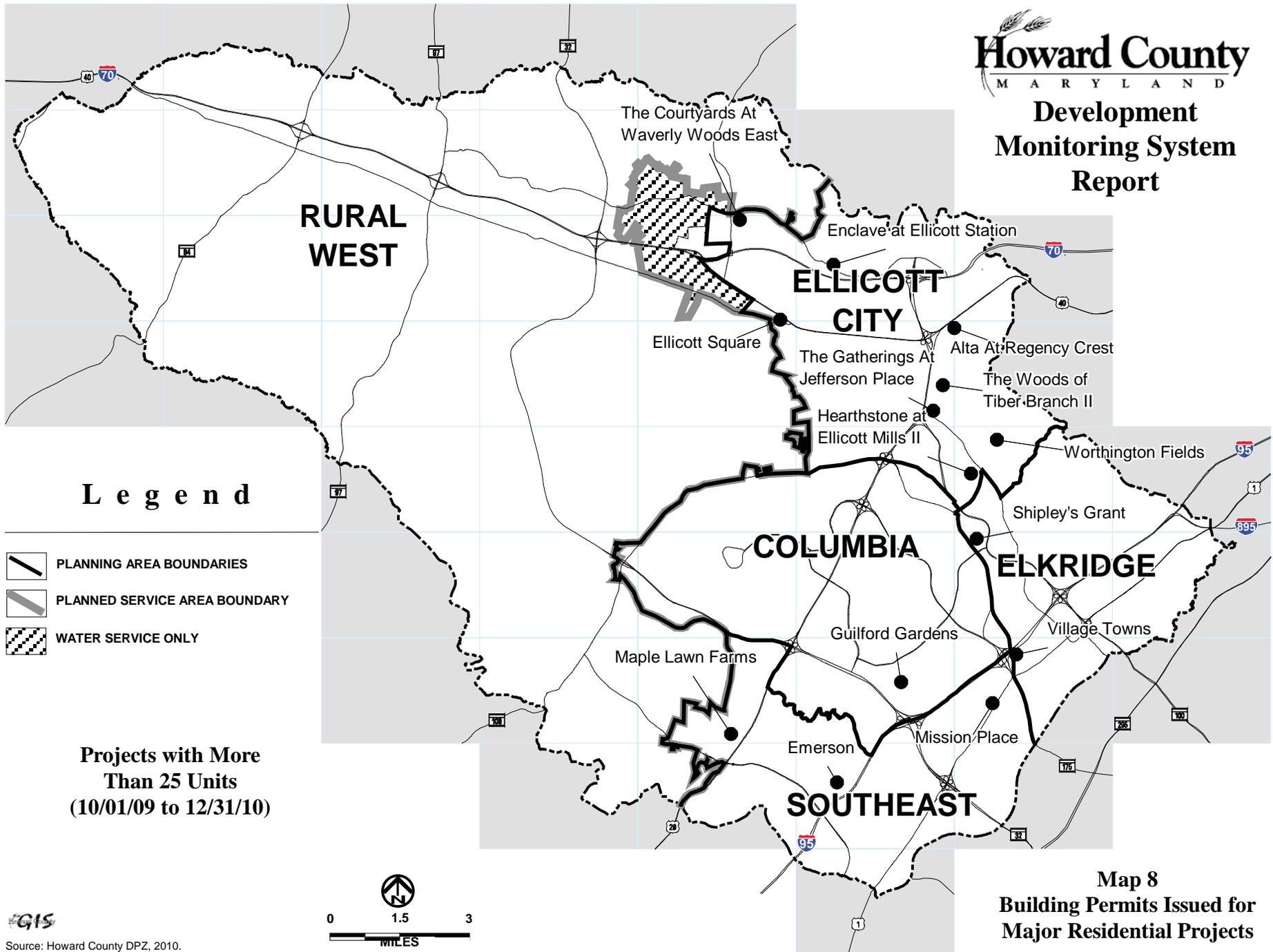
Year	SFD	SFA	APT	MH	Total
10/05 to 9/06	631	525	312	6	1,474
10/06 to 9/07	472	614	803	10	1,899
10/07 to 9/08	361	360	394	42	1,157
10/08 to 9/09	294	497	445	1	1,237
10/09 to 12/10 *	637	541	650	5	1,833
TOTAL	2,395	2,537	2,604	64	7,600
PERCENT	32%	33%	34%	0.8%	100%
ANNUAL AVG.	456	483	496	12	1,520

* Extra quarter included due to change in analysis timeframe

Chart 11
Issued Building Permits by Unit Type
10/1/05 to 12/31/10



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GIS
Source: Howard County DPZ, 2010.

Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from October 1, 2009 to December 31, 2010, the County issued 1,427 use and occupancy permits (Table 29). Of all planning areas, Ellicott City had the most with 470. This is followed by the Southeast with 448, ElkrIDGE with 290, the Rural West with 161 and Columbia with 58. Countywide, 39% of the permits were for single family detached units, 43% were for single family attached units and 18% were for apartment units.

Table 29
Issued Use and Occupancy Permits by Unit Type, 10/01/09 to 12/31/2010

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	17	41	0	0	58	4%
ElkrIDGE	88	142	60	0	290	20%
Ellicott City	171	165	134	0	470	33%
Rural West	158	3	0	0	161	11%
Southeast	124	265	59	0	448	31%
TOTAL	558	616	253	0	1,427	100%
PERCENT	39%	43%	18%	0%	100%	

Five Year Results

From October 1, 2005 to December 31, 2010, a total of 7,240 use and occupancy permits have been issued in Howard County (Table 30). This is an annual average of 1,379 permits per year.

Of the 7,240 total permits issued over the five and a quarter year total, 35% were for single family detached units, 36% for single family attached units, and 30% for apartment units. Chart 12 shows the results by unit type graphically over time. Over this time period, the number of completions for single family detached units has declined from a high of 680 in 05/06 to only 337 in 08/09, followed by an increase to 558 from 10/09 to 12/10.

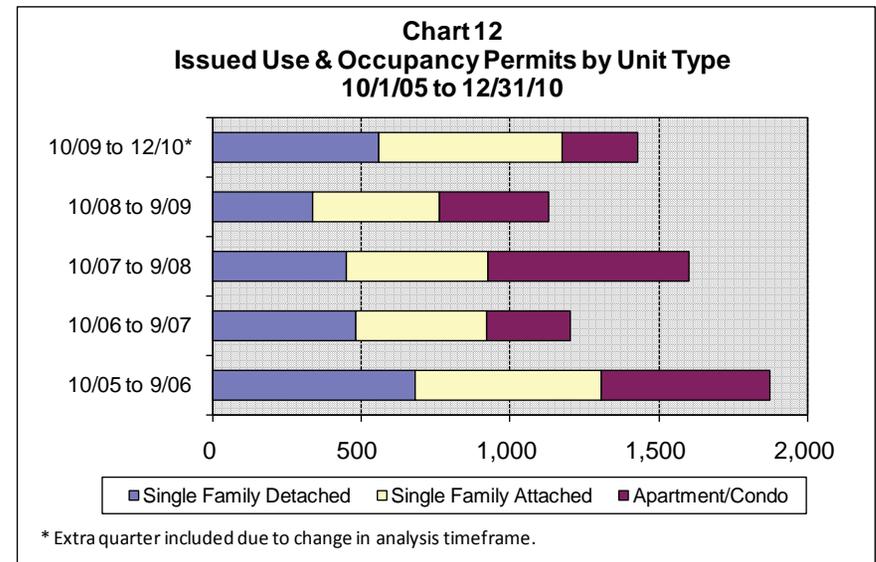


Table 30
Issued Use and Occupancy Permits by Unit Type, 10/01/05 to 12/31/10

Year	SFD	SFA	APT	MH	Total
10/05 to 9/06	680	626	567	4	1,877
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
TOTAL	2,511	2,582	2,143	4	7,240
PERCENT	35%	36%	30%	0%	100%
ANNUAL AVG.	478	492	408	1	1,379

* 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 recently established to the annual APFO chart.

The following summarizes recent development activity of age-restricted and MIHU units from October 1, 2009 to December 31, 2010, 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, 2010. This includes both subdivision and site development plans. There were 890 units in process, most of which are in Ellicott City. The timing of actual development will be paced by APFO.

Countywide there were 525 apartments (including rental and condo), 272 SFA units and 93 SFD age-restricted units. Map 9 shows location and names of the particular projects. Table 32 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, 1,187 units versus 890, respectively.

Table 31
Age Restricted Units from Plans in Process, 12/31/2010
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	132	132	15%
Elkridge	0	36	0	36	4%
Ellicott City	93	214	276	583	66%
Rural West	0	0	0	0	0%
Southeast	0	22	117	139	16%
TOTAL	93	272	525	890	100%
PERCENT	10%	31%	59%	100%	
As of 09/30/09	247	248	692	1,187	

Table 32 shows the total MIHU units in process. These total 771, the majority of which are in Elkridge. This is more than the number in process the previous year which had 637.

Table 32
MIHU Units from Plans in Process, 12/31/2010
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	15	12	27	4%
Elkridge	0	117	383	500	65%
Ellicott City	0	6	44	50	6%
Rural West	0	0	0	0	0%
Southeast	10	6	178	194	25%
TOTAL	10	144	617	771	100%
PERCENT	1%	19%	80%	100%	
As of 09/30/09	10	125	502	637	

Table 33 shows just the age-restricted MIHU units in process, 67 of the 771 MIHU unit total. The remaining 704 units are MIHU units that are not age-restricted. There were 89 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	18%
Elkridge	0	5	0	5	7%
Ellicott City	0	6	29	35	52%
Rural West	0	0	0	0	0%
Southeast	0	0	15	15	22%
TOTAL	0	11	56	67	100%
PERCENT	0%	16%	84%	100%	
As of 09/30/09	0	11	76	87	

Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between October 1, 2009 and December 31, 2010. There were a total of 355 units approved, a larger number than the 189 units approved during the previous reporting period. The 355 units include 195 apartment units most of which are in the Ellicott City planing area, 85 town-house and 75 single family units all of which are in 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 70 units were approved – 15 in Ellicott City, 28 in Elkridge and 27 in Columbia. Twenty of these units were age-restricted - shown in Table 36. Map 7 shows the approved projects with MIHU units and Table 38 shows the plan details.

Table 34
Age Restricted Units from Approved Plans, 10/01/09 to 12/31/2010
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	45	45	13%
Elkridge	0	0	0	0	0%
Ellicott City	75	85	150	310	87%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	75	85	195	355	100%
PERCENT	21%	24%	55%	100%	
10/01/08 to 09/30/09	0	62	127	189	

Table 35
MIHU Units from Approved Plans, 10/01/09 to 12/31/10
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	27	27	39%
Elkridge	0	24	4	28	40%
Ellicott City	0	0	15	15	21%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	24	46	70	100%
PERCENT	0%	34%	66%	100%	
10/01/08 to 09/30/09	0	23	13	36	

Table 36
Age-Res. MIHU Units from Approved Plans, 10/01/09 to 12/31/10
(with comparisons to the previous year)

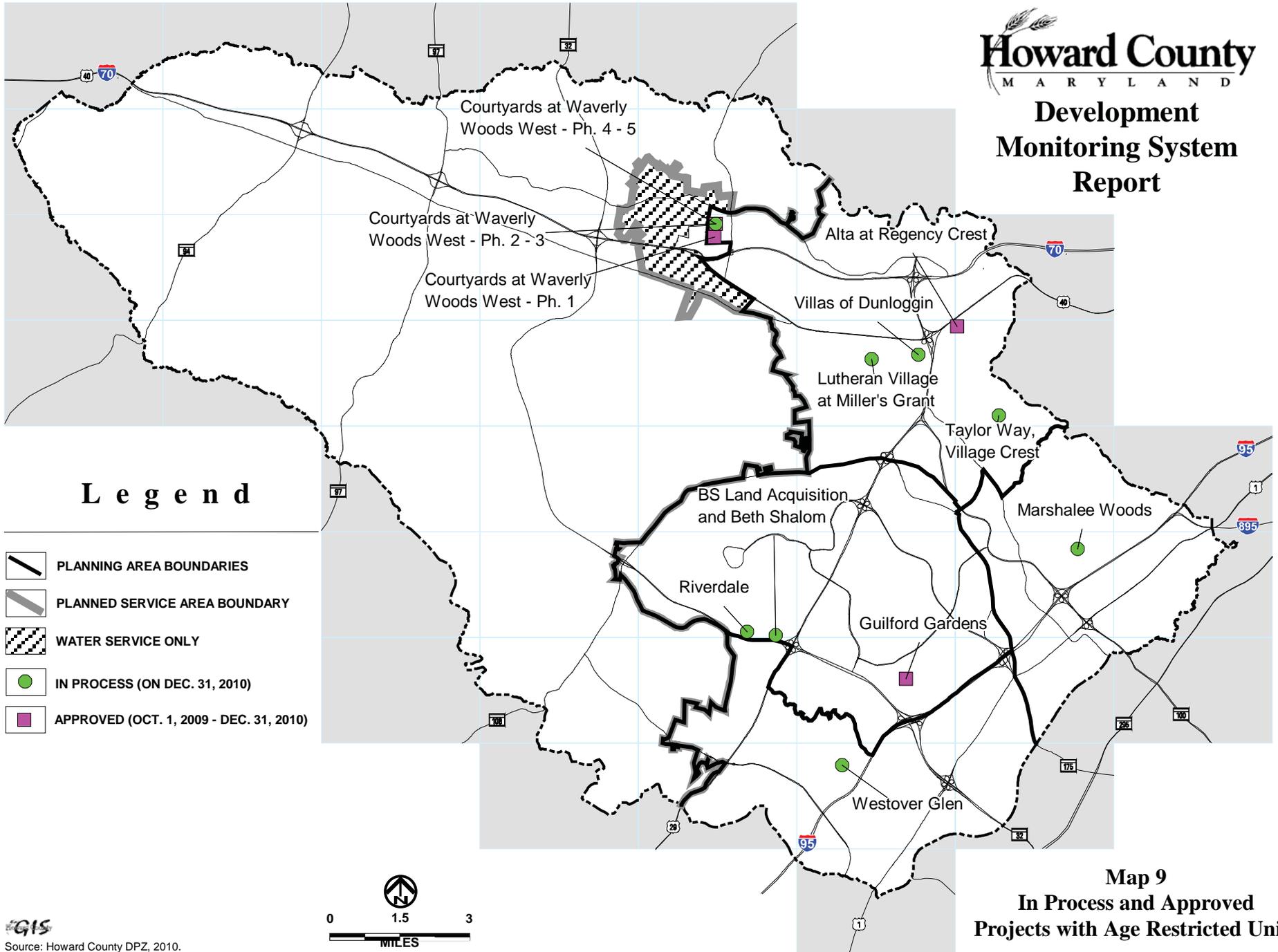
Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	5	5	25%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	15	15	75%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	20	20	100%
PERCENT	0%	0%	100%	100%	
10/01/08 to 09/30/09	0	6	13	19	

**Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2010**

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						
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	0	20	20	
Courtyards at Waverly Woods West - Ph. 4 & 5	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	57	133	0	190
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	0	
Riverwalk	SDP-10-060	R-SA-8	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0	0	
Howard Square	F-08-013	CAC	0	28	200	228	0	0	0	0	0	28	200	228	0	0	0	0	0	
Howard Square	SDP-08-078	CAC	0	13	0	13	0	0	0	0	0	13	0	13	0	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	0	
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		
Morris Place	S-10-002	CAC	0	28	0	28	0	0	0	0	0	28	0	28	0	0	0	0	0	
Marshalee Woods	SDP-08-049	R-12, R-20	0	0	0	0	0	5	0	5	0	5	0	5	0	31	0	31		
Riverdale	SP-08-002	POR, R-SA-8	0	15	0	15	0	0	12	12	0	15	12	27	0	0	100	100		
Beechcrest Apartments	SDP-10-050	CE-CLI, R-MH	0	0	13	13	0	0	0	0	0	0	13	13	0	0	0	0	0	
Riverwatch	SDP-08-109	CAC	0	0	12	12	0	0	0	0	0	0	12	12	0	0	0	0	0	
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	0	
The Glens at Guilford	SDP-10-085	R-12	10	0	0	10	0	0	0	0	10	0	0	10	0	0	0	0	0	
The Meadows at Ellicott City III	P-07-019	R-A-15	0	0	15	15	0	0	0	0	0	0	15	15	0	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	0	
Village Towns	S-10-001	R-MH	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0	0	
Taylor Way, Village Crest	SDP-10-052	POR	0	0	0	0	0	0	0	0	0	0	0	0	0	30	28	58		
Villas of Dunloggin	SDP-07-054	R-SC	0	0	0	0	0	6	0	6	0	6	0	6	0	45	0	45		
Westover Glen	SDP-06-039	PSC	0	0	0	0	0	0	15	15	0	0	15	15	0	22	102	124		
TOTAL			10	133	561	704	0	11	56	67	10	144	617	771	93	261	469	823		



Development Monitoring System Report



Legend

- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY
- IN PROCESS (ON DEC. 31, 2010)
- APPROVED (OCT. 1, 2009 - DEC. 31, 2010)

GIS
Source: Howard County DPZ, 2010.



Map 9
In Process and Approved
Projects with Age Restricted Units

Table 38
Approved SDP's with MIHU and Age Restricted Units - October 1, 2009 to December 31, 2010

Plan Name	File Number	Zoning	MIHU Units												Market Rate Age Restricted Units							
			Not Age Restricted				Age Restricted				Total MIHU				Age Restricted Units							
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total				
Courtyards West - Waverly Woods - Ph. 1	SDP-09-037	PSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	8	0	10
Courtyards West - Waverly Woods - Ph. 2 & 3	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	73	77	0	150
Alta at Regency Crest	SDP-08-068	POR	0	0	0	0	0	0	15	15	0	0	0	0	0	0	0	0	0	0	135	135
Village Towns - Phase 3B	SDP-10-001	R-MH	0	5	0	5	0	0	0	0	0	5	0	5	0	0	0	0	0	0	0	0
Guilford Gardens	SDP-09-045	R-A-15	0	0	22	22	0	0	5	5	0	0	0	0	0	0	0	0	0	0	40	40
Howard Square	F-10-118	CAC-CLI	0	11	0	11	0	0	0	0	0	11	0	11	0	0	0	0	0	0	0	0
Shiple's Grant - Phase 5	F-10-048	R-A-15	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0	0	0	0	0
Shiple's Grant - Phase 4	F-09-088	R-A-15	0	0	4	4	0	0	0	0	0	0	4	4	0	0	0	0	0	0	0	0
TOTAL			0	24	26	50	0	0	20	20	0	24	4	28	0	24	4	28	75	85	175	335

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 October 1, 2009 and December 31, 2010 there were 4 site plans approved with age-restricted units and 6 site plans approved with MIHU units. Two were age-restricted MIHU plans.

On December 31, 2010 there were eight plans in process that included age-restricted units and 18 plans with MIHU units. Five plans were age-restricted MIHU plans.

Table 40
Number of Plans with MIHU Units
10/01/09 to 12/31/2010

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	1	1
Elkridge	9	4
Ellicott City	3	1
Rural West	0	0
Southeast	5	0
TOTAL	18	6

(1) In Process on Dec. 31, 2010

Table 39
Number of Plans with Age-Res. Units
10/01/09 to 12/31/2010

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	2	1
Elkridge	1	0
Ellicott City	4	3
Rural West	0	0
Southeast	1	0
TOTAL	8	4

(1) In Process on Dec. 31, 2010

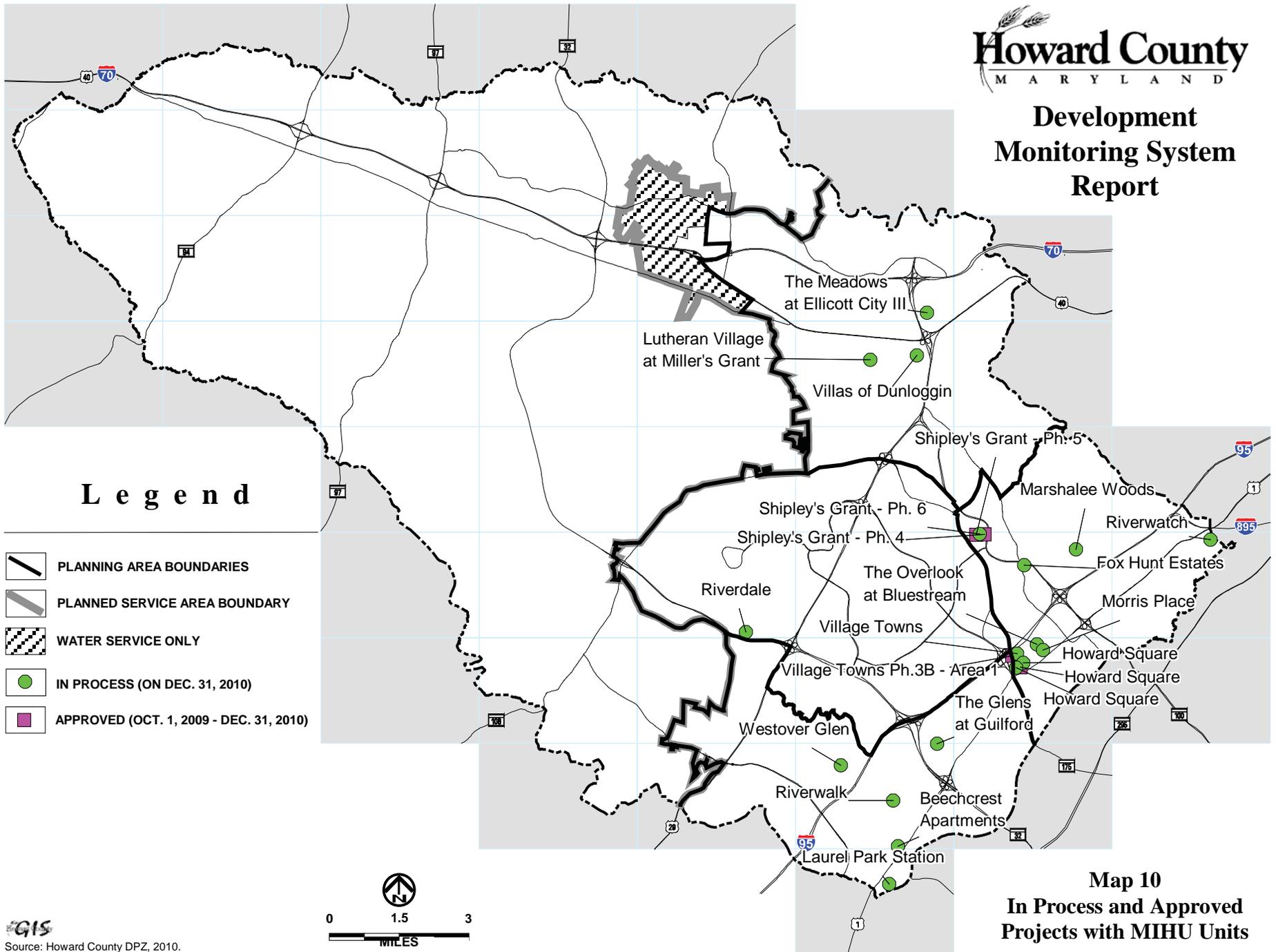
Table 41
Number of Plans with Age-Res. MIHU Units
10/01/09 to 12/31/2010

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

(1) In Process on Dec. 31, 2010



Development Monitoring System Report



Map 10
In Process and Approved
Projects with MIHU Units

GIS
 Source: Howard County DPZ, 2010.

Use & Occupancy Permits

Table 42 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between October 1, 2009 and December 31, 2010 250 age-restricted units were built, 18% of the total 1,427 housing units built in the County over this latest reporting period.

There were about the same number of age-restricted units built in the current reporting period compared to the previous period when there were 246 units built. (Note that the current period covers 15 months compared to the 12 month prior period due to the new reporting timeframe.)

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, one of every five homes built in Howard County have been age-restricted. This is summarized in Table 43.

Table 42
Age Restricted Units Built, 10/01/09 to 12/31/10
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	27	0	27	11%
Elkridge	0	0	0	0	0%
Ellicott City	0	100	118	218	87%
Rural West	0	3	0	3	1%
Southeast	0	2	0	2	1%
TOTAL	0	132	118	250	100%
PERCENT	0%	53%	47%	100%	
10/01/08 to 09/30/09	0	75	171	246	

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

Planning Area	SFD	SFA	APT	TOTAL	Total All Units Built	Age-Restricted % of Total
10/04 to 9/05	22	171	291	484	1,650	29%
10/05 to 9/06	35	233	369	637	1,877	34%
10/06 to 9/07	10	168	196	374	1,202	31%
10/07 to 9/08	7	105	130	242	1,602	15%
10/08 to 9/09	0	75	171	246	1,132	22%
10/09 to 12/10 *	0	132	118	250	1,427	18%
TOTAL	52	713	984	1,749	8,890	20%
PERCENT	3%	41%	56%	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 October 1, 2009 to September 30, 2010, 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 appear to have stabilized, remaining flat compared to the previous year. They have steadily declined from their \$400,000 mean sales price peak in 2005/2006 for all housing types combined to a mean of \$350,000 in 2008/2009 and again last year in 2009/2010.

Prices began declining slightly in 2006/2007, which was the first time prices had fallen for at least 15 years. Price declines accelerated thereafter. The downward trend appears to have stopped. Since the peak in 05/06, median prices for single family detached units have fallen by 18%. The median for SFA or townhouse units have fallen by 13% and condos by 21%.

For the latest reporting period, the median sales price for condos was \$217,500. SFA or townhouse units sold on average for \$305,000. The average single family detached home in the county sold for \$470,000. Sales varied by zip code as indicated on Map 11.

Table 44
Housing Sales by Type, 10/01/05 to 9/30/10

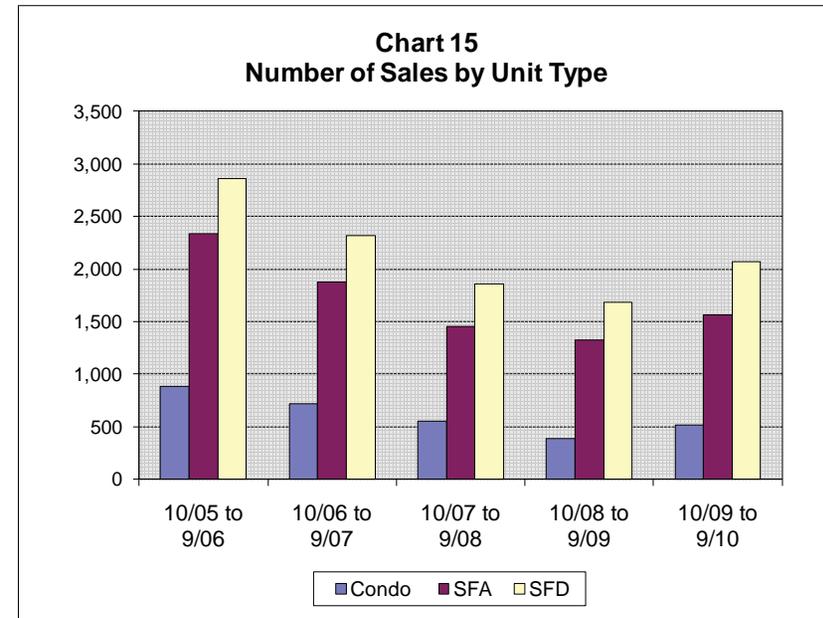
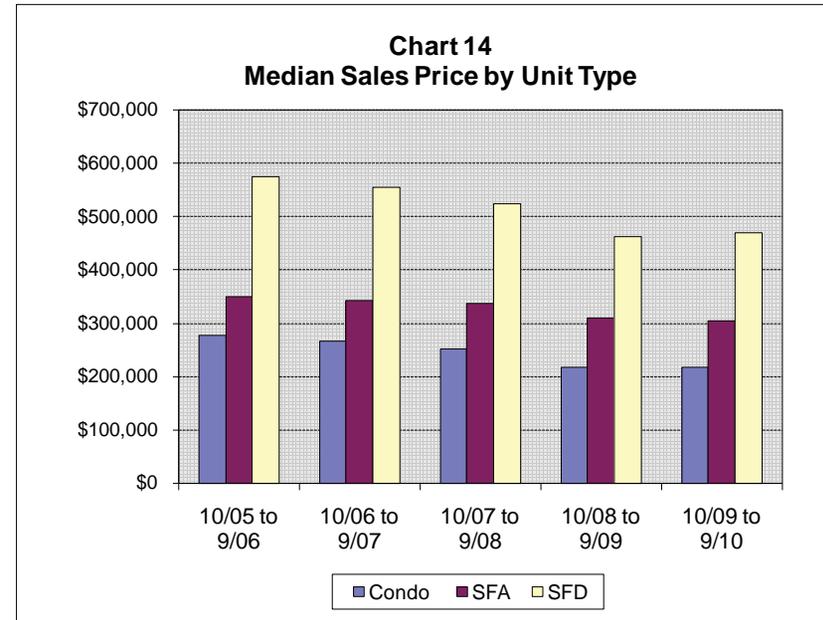
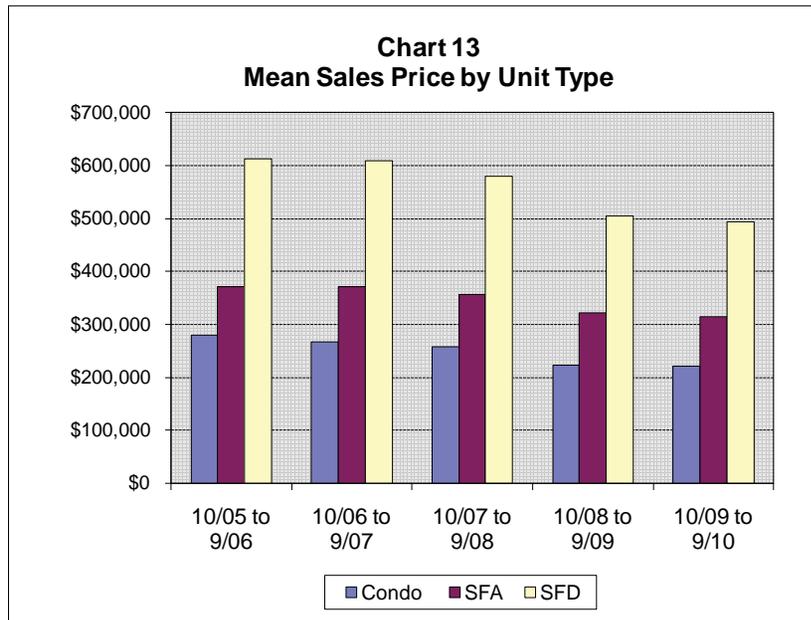
10/05 to 9/06				10/06 to 9/07			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	886	\$279,802	\$276,815	Condo	715	\$267,218	\$266,075
MH	5	\$106,200	\$121,000	MH	6	\$125,133	\$130,150
SFA	2,340	\$371,880	\$349,348	SFA	1,873	\$370,918	\$342,500
SFD	2,863	\$612,088	\$575,000	SFD	2,320	\$609,104	\$555,000
TOTAL	6,094	\$471,126	\$400,000	TOTAL	4,914	\$467,982	\$394,058

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

10/09 to 9/10			
Unit Type	# of Sales	Mean	Median
Condo	512	\$222,211	\$217,500
MH	1	\$90,000	\$90,000
SFA	1,565	\$313,832	\$305,000
SFD	2,072	\$494,261	\$470,000
TOTAL	4,150	\$392,558	\$350,000

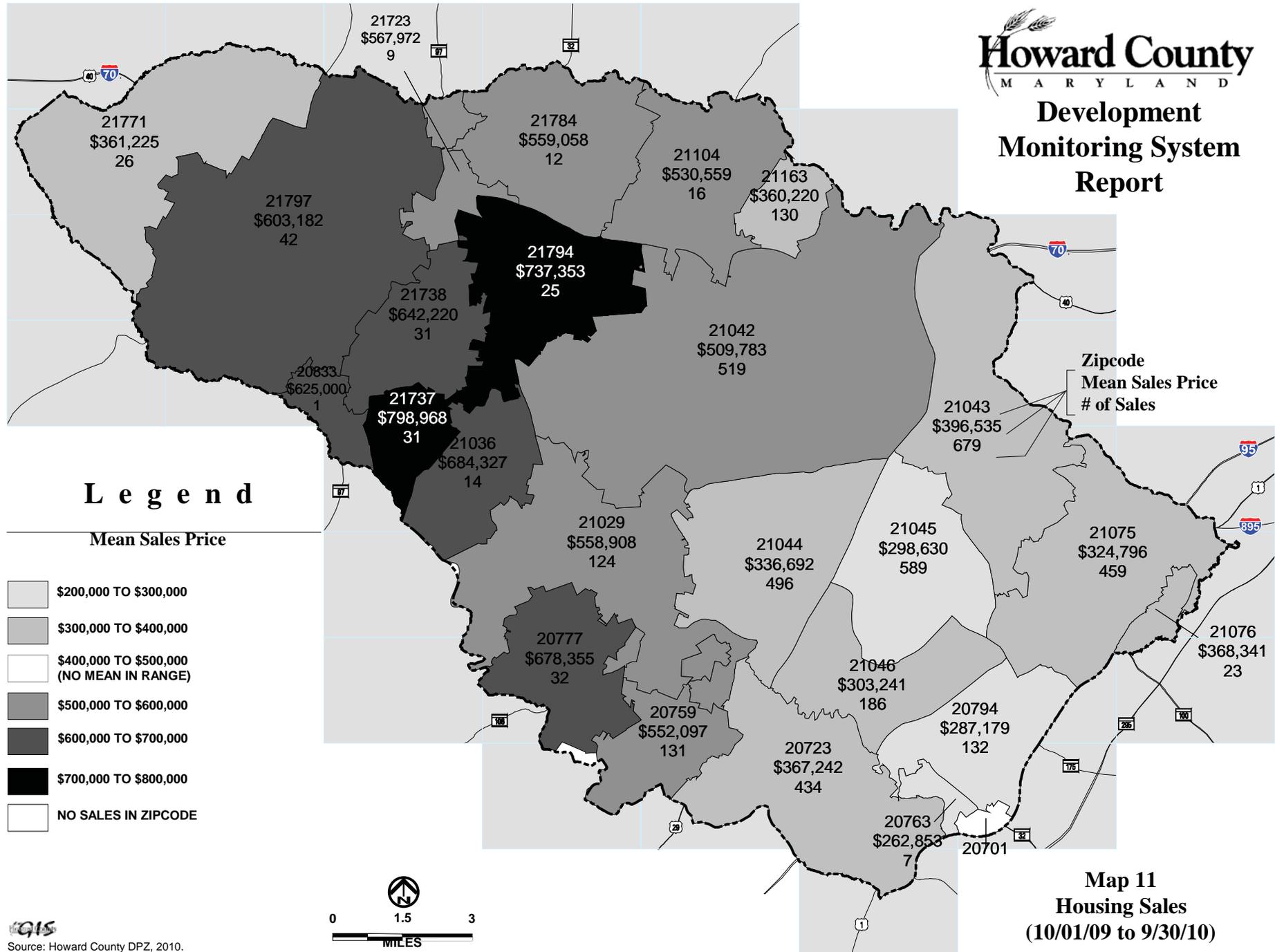
Source: Howard County DPZ analysis of housing sales data from SDAT

A good sign in the residential housing market is that the total number of sales have increased for the first time in several years. Total sales increased from 3,403 units in 08/09 to 4,150 last year. This is 22% one year increase. Total sales are still less than five years ago, however, a peak sales year when over 6,900 homes were sold.





Development Monitoring System Report



Legend

Mean Sales Price

- \$200,000 TO \$300,000
- \$300,000 TO \$400,000
- \$400,000 TO \$500,000
(NO MEAN IN RANGE)
- \$500,000 TO \$600,000
- \$600,000 TO \$700,000
- \$700,000 TO \$800,000
- NO SALES IN ZIPCODE

Source: Howard County DPZ, 2010.



Map 11
Housing Sales
(10/01/09 to 9/30/10)

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 has been a competitive application cycle, meaning there isn’t enough funding to acquire easements on all of the applicant properties. Offers were made on the top seven scoring properties 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 have accepted the offer.

Of the seven total property owners who accepted their ALPP offers, settlement occurred on four of the farms by December 31, 2010, the end of this current DMS reporting period. These four properties include a total of 374 acres that are now permanently preserved. The other three properties totaling 793 acres are hoping to settle in 2011. In addition to the four Batch 14 properties, the ALPP was offered an easement donation on a 53 acre farm in Mt. Airy. The ALPP happily acquired this easement in November 2010.

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 22 acres was preserved with an agricultural easement through the development process.

As of December 31, 2010, there were 20,824 acres of permanently preserved agricultural land. This includes 13,858 acres of purchased easements through the County’s Program, 4,041 acres of easements purchased by the State and 2,925 preservation acres dedicated as part of the development process (Table 45).

**Table 45
Agricultural Preservation Easements, December 31, 2010**

Type	Acres	Percent
County Purchased Agric. Easements	13,858	67%
State Purchased Agric. Easements	4,041	19%
Dedicated Agric. Preservation Parcels	2,925	14%
TOTAL	20,824	100%

Other Rural Easement Dedication

As previously indicated, last year 22 acres were created 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 2,925.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 95 acres of land in 17 parcels were dedicated as joint Howard County/Homeowner's Association preservation parcels, 68 acres on one parcel was dedicated as a joint Howard County Conservancy/Homeowner's Association parcel, and another 21 acres on one parcel was dedicated as a joint Howard County/Patuxent Conservation Corps preservation parcel. Table 46 shows the land preservation totals from dedicated easements to date for all easement types.

Since 1992, preservation easements on 10,454 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 5,672 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 2,925 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 14,460 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,006 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 10,454 acres, is land in dedicated preservation easements and open space as described earlier. Of the 4,006 acres for residential development, about 819 acres are not yet developed (built on), 2,787 acres are developed (built on) and 400 acres are for roads.

Preservation easements in the Rural West discussed above total 28,353 acres. This includes all 20,824 acres of agricultural preservation easements

and 7,529 acres of environmental preservation parcels dedicated through the subdivision process. This represents about 30% 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)	436	509	
Undeveloped Lots (From Density Transfer)	289	310	
Total Undeveloped Lots	725	819	
Developed Lots (By Right)	1,705	1,930	
Developed Lots (From Density Transfer)	809	857	
Total Developed Lots	2,514	2,787	
Roadway		400	
TOTAL	3,239	4,006	27.7%

Preservation	Lots	Acres	
Agricultural Preservation	85	2,925	
Howard County/Homeowner's Association	519	5,672	
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	93	414	
Total Preservation	745	10,454	72.3%

GRAND TOTAL (Includes Res. Develop.)	3,984	14,460	100.0%
---	--------------	---------------	---------------

Total Preserved Land in the Rural West

Including County and State parks (7,989 acres), WSSC land (2,466 acres), permanent historic easements (102 acres) and other environmental easements (1,073 acres) the total preserved land amounts to 39,983 acres, about 42% of all land in the Rural West.

Map 12 shows the preserved land as of December 31, 2010 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.

This is the first time that the results of this option have been reported in the Development Monitoring System report. Thus far, from the start of this program in September 2008 through 2010, there have been three subdivisions utilizing this option.

Table 47 shows the aggregate results. A total of 3 neighborhood preservation parcels have been created totaling 6 acres. The easement holder for all six of these acres is Howard County. Through this process, additional density was created for two additional single family detached homes and six additional townhomes on a total of about 1.1 acres. These additional units are part of receiving subdivisions that total 120 housing units on 50.2 acres. Thus far through the end of 2010, 77 of these 120 units are built. It should be noted that 27 of the 50.2 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 94 other land trust conservation easements. Total preservation easements in the east therefore amount to 610 acres. This is summarized in Table 48.

Total Preserved Land in the East

Including County and State parks (10,070 acres), WSSC land (680 acres) and Columbia Association open space (3,752 acres) the total preserved land amounts to 15,112 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

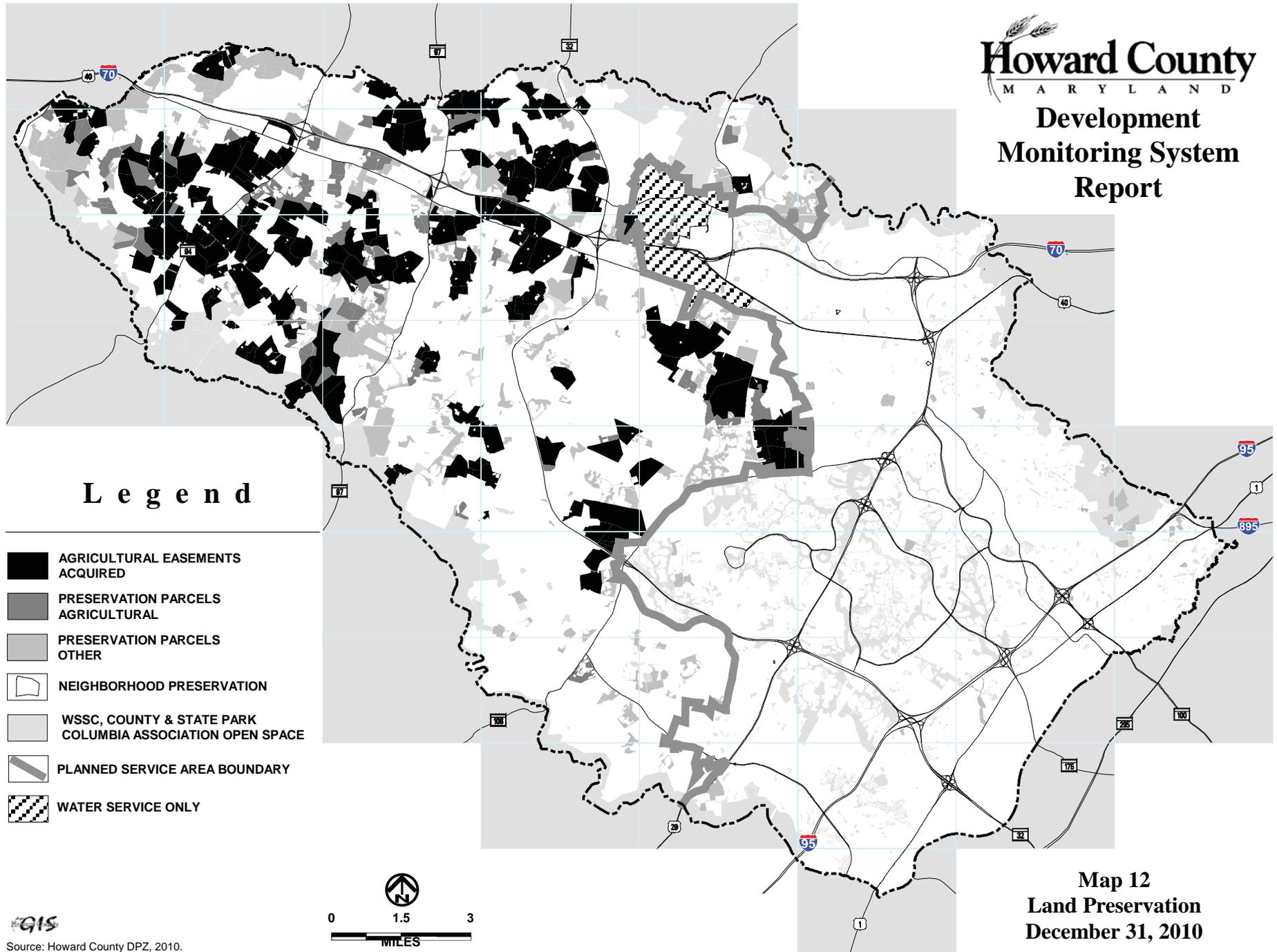
Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Undeveloped Lots (By Right)	41	0	0	41	6.9
Undeveloped Lots (From Density Transfer)	2	0	0	2	0.4
Total Undeveloped Lots	43	0	0	43	7.3
Developed Lots (By Right)	11	60	0	71	11.0
Developed Lots (From Density Transfer)	0	6	0	6	0.7
Total Developed Lots	11	66	0	77	11.7
Open Space					27.0
Roadway					3.3
Other					0.9
Total	54	66	0	120	50.2 89.3%

East Preserved Land - Sending Parcels	Preservation	Acres
Easement Holder	Parcels	
Howard County Government	3	6.0
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Total Preservation	3	6.0 10.7%
GRAND TOTAL		56.2 100.0%

Table 48
East Preservation Easements, December 31, 2010

Type	Acres	Percent
Neighborhood Preservation	6	100%
Permanent Historic Easements	194	32%
Maryland Environmental Trust Easements	316	52%
Land Trust Conservation Easements	94	16%
TOTAL	604	100%
TOTAL EAST PRESERVATION	610	

Howard County
M A R Y L A N D
**Development
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Source: Howard County DPZ, 2010.

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 5 non-residential lots recorded countywide in 26 subdivision plans totaling 647 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, 10/01/2009 to 12/31/2010

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	1	20%	5	19%	164	25%
Elkridge	3	60%	6	23%	207	32%
Ellicott City	0	0%	5	19%	82	13%
Rural West	0	0%	0	0%	0	0%
Southeast	1	20%	10	38%	193	30%
TOTAL	5	100%	26	100%	647	100%

Table 50 shows the recorded non-residential subdivisions from October 1, 2005 to December 31, 2010. Over this five year period there were 54 non-residential lots recorded countywide in 164 subdivision plans totaling 3,966 acres. This amounts to an annual average over the analysis time period of 10 lots in 31 plans encompassing 755 acres.

Table 50
Recorded Non-Residential Subdivisions, 10/01/05 to 12/31/10

Countywide	Lots	Plans	Acreage
10/05 to 09/06	23	43	1,351
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
TOTAL	54	164	3,966
ANNUAL AVG.	10	31	755

* Extra quarter included due to change in analysis timeframe

In-Process Plans

Countywide, there were 24 non-residential subdivision plans in process as of December 31, 2010. This compares to 18 plans in process for the previous reporting period (Table 51). Six plans were in the Southeast, five plans each in Ellicott City, the Rural West and Columbia, two in Ellicott City and three in Elkridge. 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, 2010, there were 26 lots in process, compared to 7 in process on September 30, 2009. These include resubdivisions for the purpose of adding roadways or easements.

There were a total of 234 non-residential acres in the subdivision process as of December 31, 2010 (Table 53). This compares to 473 acres in process one year earlier. For the current year the greatest acreage amount is in the Southeast (140 acres). This is followed by Elkridge with 52 acres, the Rural West with 20, Columbia with 13 acres, and Ellicott City with eight acres.

Table 51
Number of Non-Residential Plans in Process, 12/31/2010
with Comparisons to 09/30/09 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Columbia	3	0	0	0	2	5
Elkridge	0	0	0	0	3	3
Ellicott City	3	0	0	0	2	5
Rural West	4	0	0	0	1	5
Southeast	0	2	0	0	4	6
TOTAL	10	2	0	0	12	24
09/30/09 Total	NA *	1	2	1	14	18

* Environmental Concept Plans (ECP) first required June, 2010.

Table 52
Non-Residential Lots from Subdivision Plans in Process, 12/31/2010
with Comparisons to 09/30/09 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Columbia	0	0	0	3	3
Elkridge	0	0	0	4	4
Ellicott City	0	0	0	3	3
Rural West	0	0	0	1	1
Southeast	6	0	0	9	15
TOTAL	6	0	0	20	26
09/30/09 Total	3	1	0	3	7

Table 53
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2010
with Comparisons to 09/30/09 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Columbia	0	0	0	13	13
Elkridge	0	0	0	52	52
Ellicott City	0	0	0	8	8
Rural West	0	0	0	20	20
Southeast	64	0	0	76	140
TOTAL	64	0	0	170	234
09/30/09 Total	73	66	45	289	473

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 about 978,000 square feet were approved in 35 site development plans on 315 acres (Table 54). The greatest amount of square footage approved by far was in the Southeast, followed by Ellicott City. Columbia, Elkridge and the Rural West had smaller amounts approved.

Table 55 shows the approved square footage by building type. About 783,000 square feet, 80% of the total, are for office/service uses, most of which is in the Southeast. About 77,000 square feet, 8% of the total, are for retail uses. Government & institutional account for 95,000 square feet. There were minimal amounts of approved square feet for manufacturing/extensive industrial and other uses. Chart 16 shows this breakdown graphically.

Table 55
Building Square Feet in Approved Site Development Plans
10/01/09 to 12/31/10

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	14,820	0	0	17,763	0	32,583
Elkridge	2,850	17,075	1,620	0	0	21,545
Ellicott City	54,300	126,622	0	72,798	6,566	260,286
Rural West	0	0	0	4,368	0	4,368
Southeast	5,393	639,552	8,800	0	5,093	658,838
TOTAL	77,363	783,249	10,420	94,929	11,659	977,620
PERCENT	7.9%	80.1%	1.1%	9.7%	1.2%	100.0%

Chart 16
Sq. Ft. in Approved Site Development Plans
10/1/09 to 12/31/10

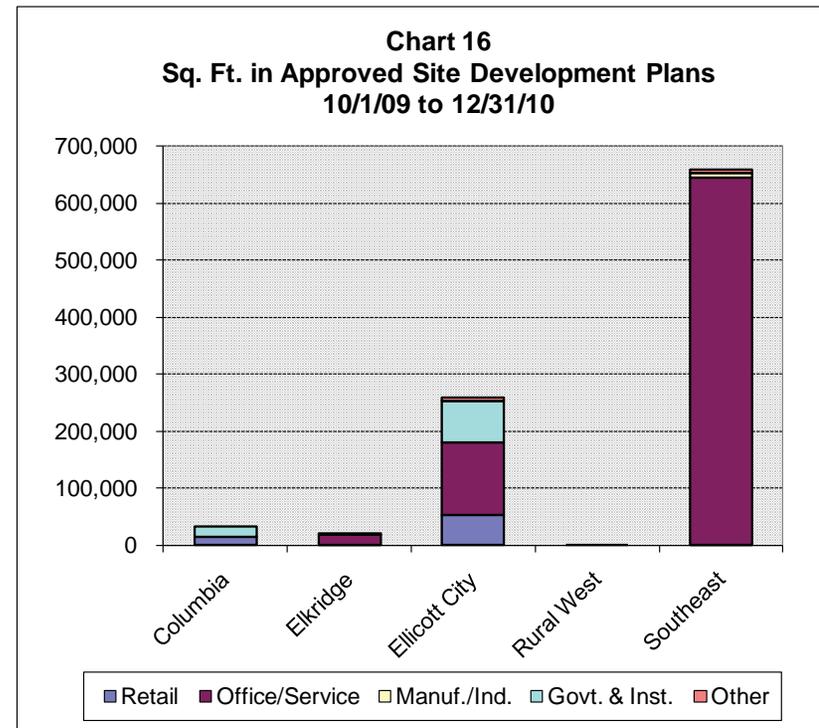


Table 54
Approved Non-Residential Site Development Plans, 10/01/09 to 12/31/10

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	32,583	3%	5	14%	43	14%
Elkridge	21,545	2%	9	26%	80	25%
Ellicott City	260,286	27%	9	26%	74	23%
Rural West	4,368	0%	2	6%	42	13%
Southeast	658,838	67%	10	29%	76	24%
TOTAL	977,620	100%	35	100%	315	100%

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

Of the 978,000 square feet of non-residential building space approved in site development plans last year, about 823,000 square feet, 84% of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 56. The location of these plans are shown on Map 13.

In Ellicott City, two large plans with more 50,000 square feet of building space were approved last year - the new Miller Library and Historical Center and office and retail space in Turf Valley.

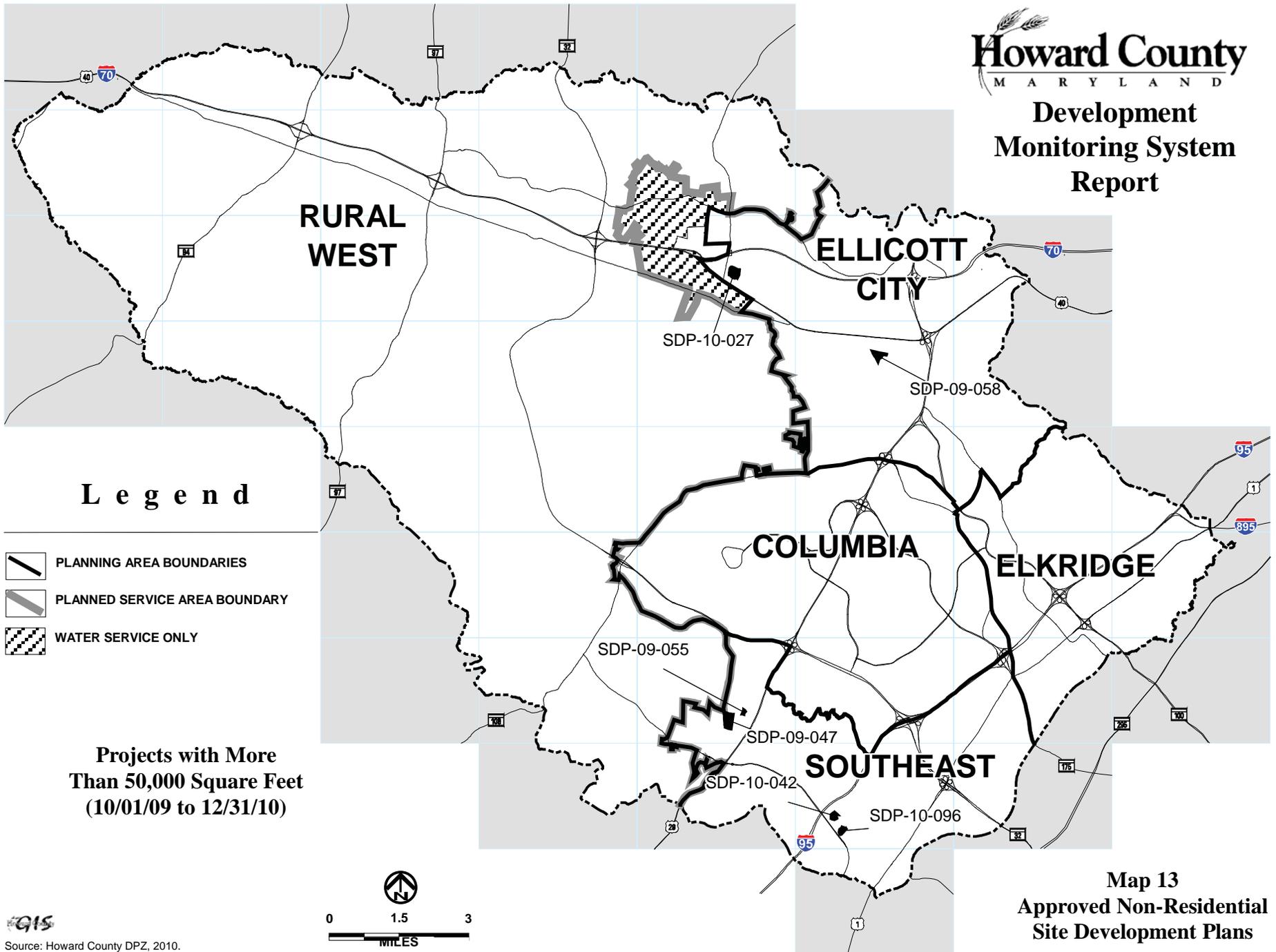
In the Southeast, four large buildings were approved. The largest was a 200,000 square foot office building at the Johns Hopkins Applied Physics Lab, the largest of all buildings approved in the County last year. Two 150,000 square foot office buildings were approved in Emerson. A 97,000 square foot Homewood Suites hotel and restaurant was also approved.

Table 56
Projects With More Than 50,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/09 to 12/31/10

Region	File Number	Plan Name	Use	Building Area	TOTAL
Ellicott City	SDP-10-027	Town Square at Turf Valley	Office and Grocery Store/Retail	160,000	226,350
	SDP-09-058	Miller Library & Historical Center	New Public Library	66,350	
Southeast	SDP-09-047	JHU-APL - Building 200	Office	200,000	596,612
	SDP-10-096	Emerson - Parcel F	Office	149,999	
	SDP-10-042	Emerson - Parcel C	Office	149,999	
	SDP-09-055	Homewood Suites	Hotel/Restaurant	96,614	
TOTAL					822,962



Development Monitoring System Report



Legend

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

Projects with More Than 50,000 Square Feet (10/01/09 to 12/31/10)

GIS Source: Howard County DPZ, 2010.

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, 2005 to December 31, 2010. Over this timeframe there were 229 plans approved on 1,843 acres including 8.4 million square feet of building space. This equates to an annual average of about 1.6 million square feet of new building space per year.

Last year, with about 980,000 square feet of approved space, was the smallest of all time periods. The previous year saw about 1 million square feet of approved space. Prior to that there were 1.5 million square feet approved. This reflects a slowdown from the 2005 and 2006 years when there was about 2.4 million square feet approved annually. 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 56% of the total 8.4 million square feet was for office/service space. About 19% was for manufacturing/extensive industrial space, 16% for retail uses, 9% for government and institutional uses, and less than 1% for other uses.

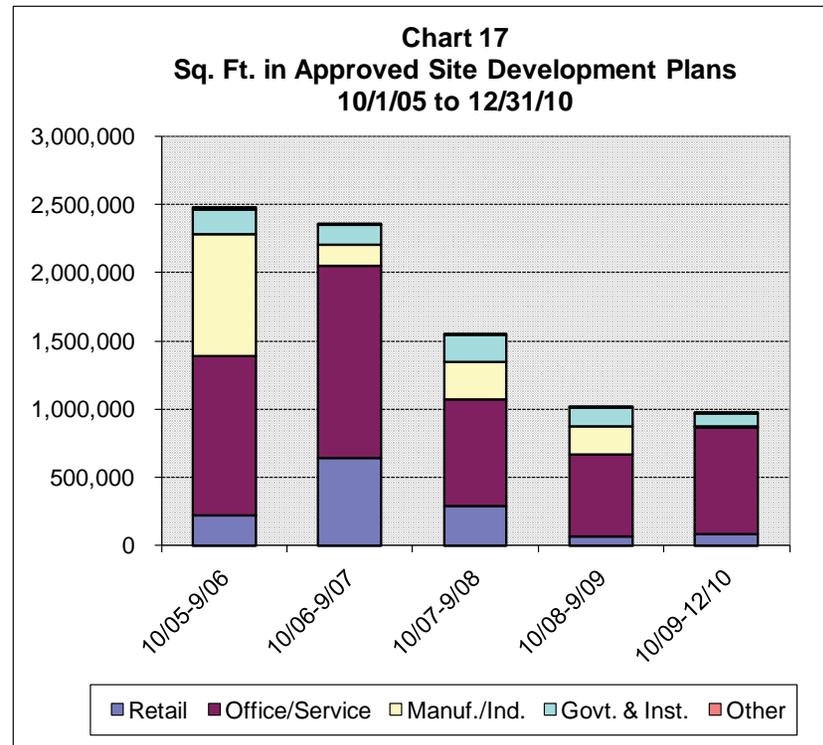


Table 57
Approved Non-Residential Site Development Plans
10/01/05 to 12/31/10

Year	Square Feet	Number or Plans	Acreage
10/05-9/06	2,473,531	50	393
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
TOTAL	8,360,128	229	1,843
ANNUAL AVG.	1,592,405	44	351

* Extra quarter included due to change in analysis timeframe

Table 58
Building Square Feet in Approved Site Development Plans
10/01/05 to 12/31/10

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/05-9/06	221,051	1,163,850	897,918	179,564	11,148	2,473,531
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
TOTAL	1,299,685	4,724,974	1,553,230	745,370	36,869	8,360,128
PERCENT	15.5%	56.5%	18.6%	8.9%	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, 2010 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 37 non-residential site development plans in process as of December 31, 2010. These plans include about 1.1 million square feet of building space covering 472 acres. This compares to about 1.7 million square feet in 52 plans on 456 acres that were in process the previous year (on September 30, 2009).

As shown in Table 59, Elkridge had the most square footage in process, followed by Columbia. Table 60 shows a more detailed breakdown of square footage by building type. About 312,000 square feet are for office/service buildings and 528,000 for manufacturing/extensive industrial uses. Retail space accounts for 133,000 square feet and there is 128,000 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 72% of the total 1.1 million square feet of building space in process

Table 59
In-Process Non-Residential Site Development Plans, 12/31/10
with Comparisons to Countywide In-Process on 09/30/09

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	261,293	24%	4	11%	56	12%
Elkridge	534,559	49%	9	24%	159	34%
Ellicott City	156,631	14%	12	32%	121	26%
Rural West	36,718	3%	8	22%	120	25%
Southeast	111,406	10%	4	11%	17	4%
TOTAL	1,100,607	100%	37	100%	472	100%
9/30/2009	1,719,596		52		456	

Table 60
Building Square Feet in In-Process Site Development Plans, 12/31/10
with Comparisons to Countywide In-Process on 09/30/09

Region	Retail	Office/	Manuf./	Govt.	Other	TOTAL
		Service	Ext. Ind.	& Inst.		
Columbia	0	74,640	172,700	13,953	0	261,293
Elkridge	0	139,539	350,833	44,187	0	534,559
Ellicott City	63,334	66,657	0	26,640	0	156,631
Rural West	19,306	7,462	0	9,950	0	36,718
Southeast	50,387	23,548	4,082	33,389	0	111,406
TOTAL	133,027	311,846	527,615	128,119	0	1,100,607
PERCENT	12.1%	28.3%	47.9%	11.6%	0.0%	100.0%
9/30/2009	86,523	875,420	615,008	124,706	16,859	1,718,516

Table 61
Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/10

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-10-005	Midway Business Center	Office/Warehouse	112,700	247,340
	SDP-07-102	Waterloo Crossing	Office	74,640	
	SDP-08-104	Dorsey Storage Building	Storage	60,000	
Elkridge	SDP-10-016	Route 100 Business Park	Warehouse	166,789	437,589
	SDP-08-116	Dorsey Run Industrial Center	Warehouse/Office	162,800	
	SDP-08-082	Corridor 95 Business Park	Office	108,000	
Ellicott City	SDP-10-036	Forest Green	Retail/Small Office	51,858	51,858
Southeast	SDP-10-067	Maple Lawn Farms - Westside District	Office/Restaurant	52,531	52,531
TOTAL					789,318

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 October 1, 2009 to December 31, 2010, 83 permits were issued for almost 1.2 million square feet in non-residential building space (Table 62). The greatest amount of square footage by far was in the Southeast, followed by Columbia and then Ellicott City.

Table 62
Issued Non-Residential Building Permits, 10/01/09 to 12/31/10

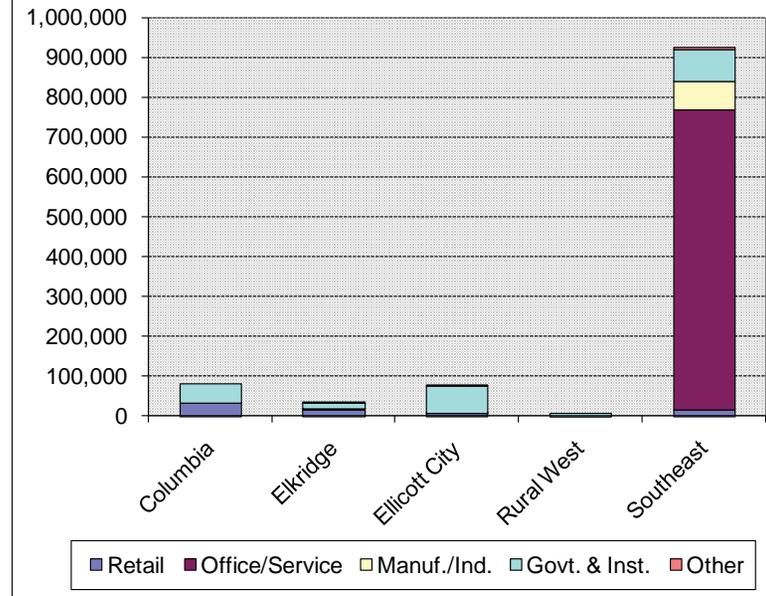
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Columbia	79,788	7%	14	17%
Elkridge	32,425	3%	13	16%
Ellicott City	75,819	7%	9	11%
Rural West	6,036	1%	14	17%
Southeast	923,741	83%	33	40%
TOTAL	1,117,809	100%	83	100%

Table 63 shows the approved square footage by building type. About 753,000 square feet, two-thirds of the total, are for office/service uses. About 213,000 square feet, 19% or the total, are for government & institutional uses. This is followed by manufacturing/extensive industrial, retail and other uses. These last three categories combined make up the remaining 14% of the total square footage issued. Chart 18 shows this breakdown graphically by Planning Area. It is clear that office space in the Southeast was the majority permitted.

Table 63
Building Square Feet in Issued Building Permits
10/01/09 to 12/31/10

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	32,086	264	0	47,438	0	79,788
Elkridge	14,408	0	3,556	12,987	1,474	32,425
Ellicott City	6,380	0	330	67,759	1,350	75,819
Rural West	1,920	0	0	4,116	0	6,036
Southeast	13,914	752,504	71,995	80,486	4,842	923,741
TOTAL	68,708	752,768	75,881	212,786	7,666	1,117,809
PERCENT	6.1%	67.3%	6.8%	19.0%	0.7%	100.0%

Chart 18
Sq. Ft. in Issued Building Permits
10/1/09 to 12/31/10



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

Of the 1.2 million square feet of non-residential building space in issued permits over the current reporting period, about 786,000 square feet, 70% of the total, were in plans with more than 50,000 square feet. These larger buildings are shown in Table 64. The location of these buildings are shown on Map 15.

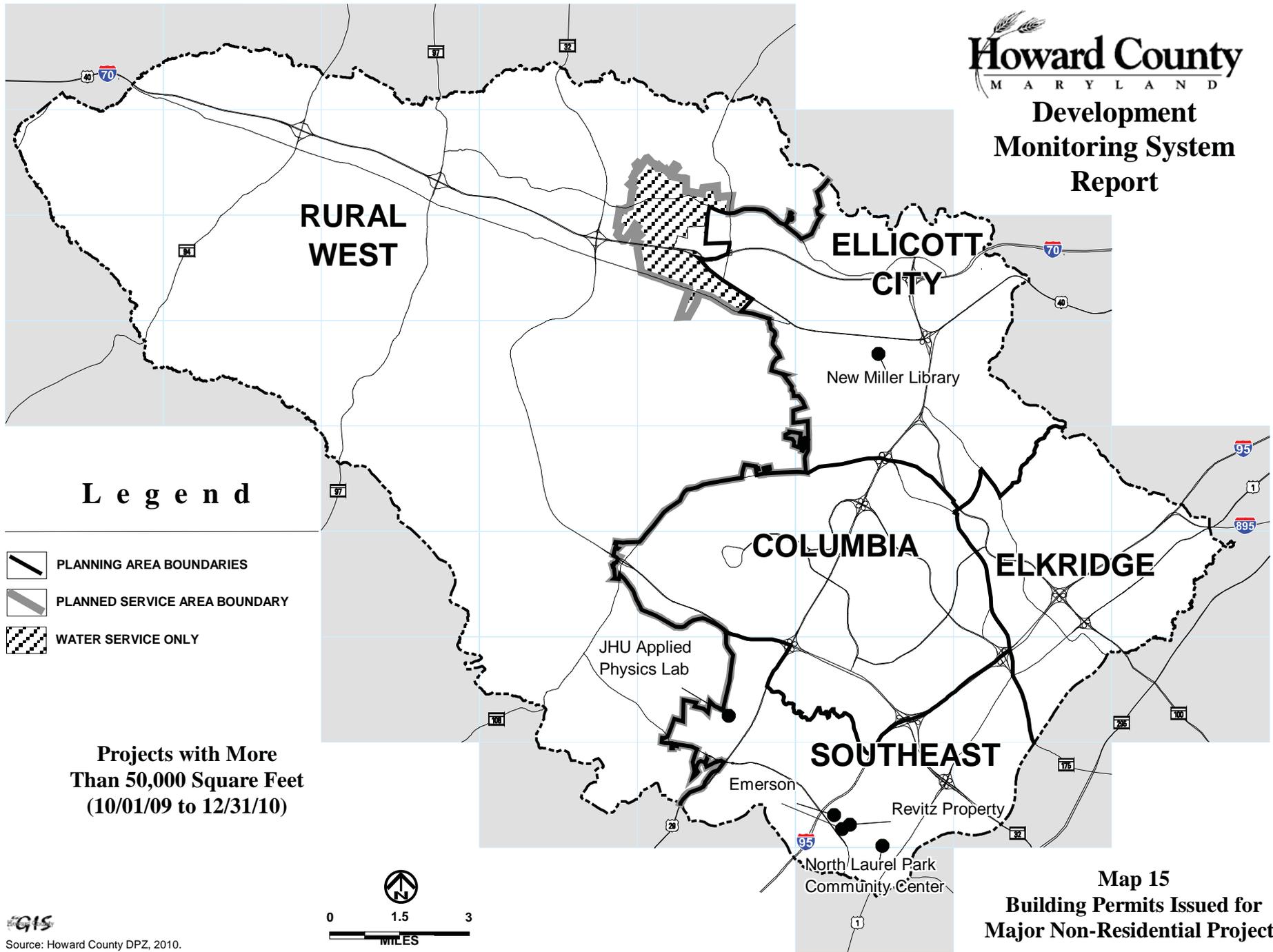
In Ellicott City, one large building greater than 50,000 square began construction – the new Miller Library.

In the Southeast, there were five larger facilities: a 200,000 square foot office building on the Johns Hopkins University Applied Physics Lab campus, a 161,607 square foot building on the Revitz Property, 2 buildings (154,420 and 149,999 square feet) in Emerson, and the new 62,520 square foot North Laurel Park Community Center.

Table 64
Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/09 to 12/31/10

Region	Subdivision/Name	Proposed Use	Square Feet	TOTAL
Ellicott City	New Miller Library	Library	57,550	57,550
Southeast	JHU Applied Physics Lab	Office Building	200,000	
	Revitz Property	Office Building	161,607	
	Emerson	Office Building	154,420	
	Emerson	Office Building	149,999	
	North Laurel Park Community Center	Community Center	62,520	
TOTAL				728,546
				786,096

Howard County
 MARYLAND
 Development
 Monitoring System
 Report



Legend

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

Projects with More Than 50,000 Square Feet (10/01/09 to 12/31/10)



Source: Howard County DPZ, 2010.



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, 2005 to December 31, 2010. Over this timeframe there were 494 permits issued for about 8.9 million square feet of building space. This equates to an annual average of about 1.7 million square feet per year.

The latest reporting period, with about 1.2 million square feet in issued permits, had about the same amount issued as the previous reporting period. (Note, however, that there is an extra quarter in this latest reporting period.) It is clear from the data that there has been a significant slowing trend with about 3 million square feet issued in 05/06, followed by 2.2 million square feet issued in 06/07 and then 1.5 million square feet issued in 07/08. The recent recession has played a major part in this slowdown.

Table 66 shows the five year history by building type. Over the five years, 45% of the total 8.9 million square feet was for office/service space. About 20% was for manufacturing/extensive industrial space, 17% for government and institutional uses, about 12% for retail and 6% for other uses. Chart 19 shows this graphically.

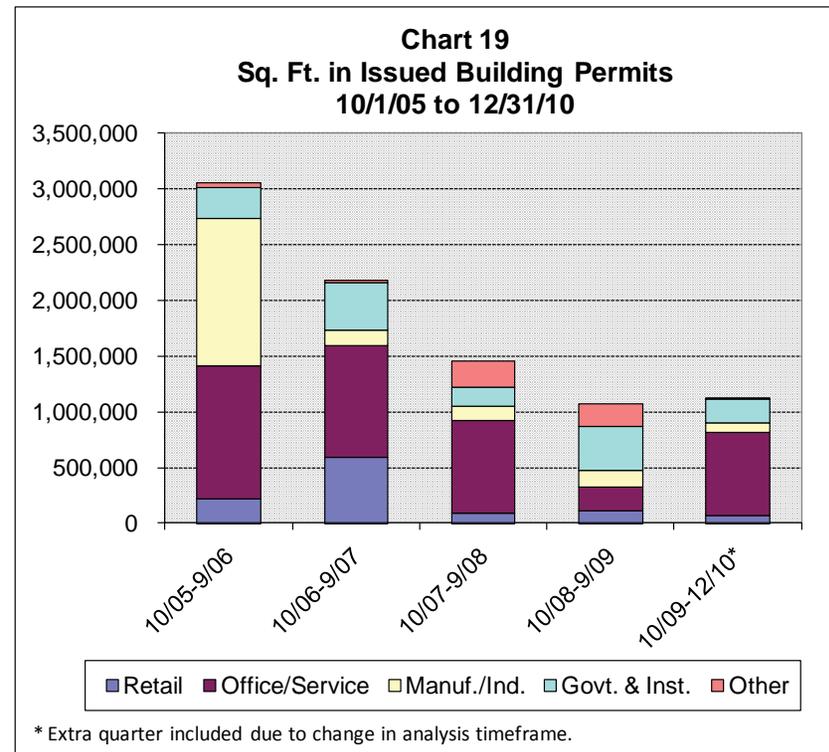


Table 65
Issued Non-Residential Building Permits
10/01/05 to 12/31/10

Year	Square Feet	Number of Permits
10/05-9/06	3,061,783	143
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
TOTAL	8,885,691	494
ANNUAL AVG.	1,692,513	94

* Extra quarter included due to change in analysis timeframe

Table 66
Building Square Feet in Issued Building Permits
10/01/05 to 12/31/10

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/05-9/06	221,456	1,189,745	1,324,846	282,570	43,166	3,061,783
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
TOTAL	1,090,322	3,980,794	1,822,048	1,497,201	495,326	8,885,691
PERCENT	12.3%	44.8%	20.5%	16.8%	5.6%	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 October 1, 2009 to December 31, 2010 could accommodate an estimated 3,527 employees (Table 68). About 22% of the potential jobs are located in Ellicott City, where they are mostly office/service jobs. About 73% of the potential jobs are in the Southeast, also mostly office/service jobs. Only about 2% of the jobs each are in Elkridge and Columbia.

Countywide, 3,133 potential jobs, or about 89% of the total are office/service jobs. This is followed by 5.4% government & institutional jobs, 5.5% retail, and only 0.3% manufacturing/extensive industrial.

Table 68
Potential Employment from Approved Non-Residential SDP's
By Use Category, 10/01/09 to 12/31/2010

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	TOTAL	PERCENT
Columbia	37	0	0	36	73	2%
Elkridge	7	68	2	0	77	2%
Ellicott City	136	506	0	146	788	22%
Rural West	0	0	0	9	9	0%
Southeast	13	2,558	9	0	2,580	73%
TOTAL	193	3,133	10	190	3,527	100%
PERCENT	5.5%	88.8%	0.3%	5.4%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 69 below, there is a potential of 3,684 new jobs that could be accommodated based on issued building permits. About 82% of the potential are office/service jobs, all in the Southeast planning area. This is followed by 11.6% government and institutional jobs, 4.7% retail jobs and 2.1% manufacturing/extensive industrial jobs.

Table 69
Potential Employment from Issued Building Permits
By Use Category, 10/01/09 to 12/31/2010

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	TOTAL	PERCENT
Columbia	80	1	0	95	176	5%
Elkridge	36	0	4	26	66	2%
Ellicott City	16	0	0	136	152	4%
Rural West	5	0	0	8	13	0%
Southeast	35	3,010	72	161	3,278	89%
TOTAL	172	3,011	76	426	3,684	100%
PERCENT	4.7%	81.7%	2.1%	11.6%	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 2009 and 2010. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of about 1,633 jobs per year for the last 10 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 the last two years as reported by DLLR have significantly lowered the 10 year average.

Jobs reported by the BEA through 2008 (the latest year available) result in an annual average of 4,250 new jobs from 2000 to 2008, in-line with the General Plan target. Of course, this does not include the job losses that have occurred the last two years as reported by the State DLLR due to the recession.

For the most recent reporting period, from 2009 to 2010, the State reports a decrease of 1,097 jobs in Howard County. This is the second year in a row that there have been job losses. Much steeper job losses occurred the year before from 2008 to 2009 when 5,307 jobs disappeared. This is 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 2009 and 2010. In the first quarter of 2010, DLLR reported that there were 141,169 jobs in Howard County with an average weekly wage of \$1,066. This compares to 142,266 jobs one year earlier with an average wage of \$1,038. This is a 2.7% increase in average 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)	NA	NA
2010	141,169	(1,097)	NA	NA
Average		1,633		4,250

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, 2009 and 2010

Job Type	2009		2010	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	623	\$1,130	656	\$1,243
State Government	3,252	\$856	3,387	\$948
Local Government	14,152	\$913	14,156	\$890
Subtotal/Average	18,027	\$1,038	18,199	\$913
Goods Producing				
Natural Resources and Mining	463	\$637	451	\$651
Construction	10,141	\$1,017	9,104	\$1,168
Manufacturing	6,097	\$1,178	5,847	\$1,166
Subtotal/Average	16,701	\$1,065	15,402	\$1,152
Service Providing				
Trade, Transportation, and Utilities	31,748	\$873	30,443	\$884
Information	3,818	\$1,596	3,651	\$1,526
Financial Activities	8,358	\$1,495	8,078	\$1,594
Professional and Business Services	33,121	\$1,483	34,453	\$1,538
Education and Health Services	14,556	\$781	14,648	\$770
Leisure and Hospitality	11,657	\$344	11,947	\$327
Other Services	4,280	\$630	4,348	\$609
Subtotal/Average	107,538	\$1,056	107,568	\$1,080
TOTAL	142,266	\$1,038	141,169	\$1,066

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

Howard County Department of Planning and Zoning
3430 Court House Drive
Ellicott City, MD 21043
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