



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

February 2010



DEPARTMENT OF PLANNING & ZONING

Marsha S. McLaughlin, Director

A Message from the Planning Director:

I am pleased to present the 18th annual Development Monitoring System Report. This report has been issued each year since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. It 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. Sections on housing sales data and land preservation are included as well as are statistics on age-restricted and moderate income housing units.

Last year, only 1,163 housing units were completed, the smallest number reported over the last five years. In fact, it is the smallest number since 1982 when only 1,131 units were built. This slowdown clearly reflects the impact the current recession has had on housing construction. The annual reporting period begins October 1, 2008, the month the national credit crisis accelerated. It appears, however, that the economy has bottomed out as building starts actually increased last year compared to the previous year — 1,237 issued building permits during this current reporting period compared to 1,157 permits issued the previous year.

There are 7,338 units in the subdivision process. Most of these units are in phased plans and will be built over the next 10 years. The County's APFO will continue to regulate the annual pace based on General Plan growth targets. As the economy continues to recover, Howard County will be well-positioned for planned housing growth to balance a growing employment base, largely caused by the Base Realignment and Closure (BRAC) impacting Ft. Meade starting in 2010/2011.

Of the 1,163 homes built last year, 277 were age-restricted for those 55 years and older, about 1 in every 4 new homes, a surprising up-tick compared to last year when only 16% of new homes were age-restricted. Over the last 5 years about 27% of new homes built have been age-restricted. The moderate income housing program is continuing to yield results with 36 units recently approved and another 637 in the planning pipeline. The decline in housing prices by almost 11% last year is also helping the affordability picture. Housing prices now are only 16% higher than they were 5 years ago reflecting the significant correction that has occurred over the last several years.

Non-residential building has continued to slow. Building permits were issued for about 1.1 million square feet of space compared to 1.5 million square feet the year before and 2.2 million square feet two years prior. However, there are 1.7 million square feet under site development plan review prior to approval, 21% more than the 1.5 million square feet under review the previous year. There are clear signs that the commercial building market will continue to grow as the economy recovers and the impact from BRAC accelerates. The County will no doubt continue to attract employers given its ideal location, excellent school system, and high quality of life.

Sincerely,

A handwritten signature in cursive script that reads "Marsha S. McLaughlin".

Marsha S. McLaughlin

Development Monitoring System Report

Date Issued:

February 2010

Reporting Period:

October 1, 2008 to September 30, 2009
With countywide summaries from October 1, 2004

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 248 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 six elementary school districts closed to development. Thus far into the current fiscal year, three projects with 14 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.

Section 16.1108 of the Adequate Public Facilities Act directs that “The Department of Planning and Zoning will monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- (1) Subdivision plans and site development plans approved during the last several years, including the number of residences and the number of new employees projected for the approved subdivisions and land developments.
- (2) Subdivision plans and site development plans in-process at the time of the report, including the number of housing unit allocations and the number of new employees projected for the proposed subdivisions and land development.
- (3) Building permits and certificates of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued.”

This is the 18th 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. Annual data for development activity are reported for the period October 1 through September 30 for the past five years beginning in October 1, 2004. More detailed information is reported for the most recent year, October 1, 2008 to September 30, 2009. The report is divided into Residential and Nonresidential parts. 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.

Residential Development

Total Housing Activity

- Over the last five years, there has been an average of 1,503 new housing units built in the County per year. About 34% of these have been single family detached, 34% single family attached, and 32% apartment units (including both rental and condo). Over this time period, the number of new single family detached units has declined while the percentage of new townhouse and apartment units has increased. (Chart 1)
- Last year, only 1,163 housing units were completed. This is the smallest number of completed permits of each of the last five years. In fact, it is the smallest number since 1982 when only 1,131 units were built. This slowdown clearly reflects the impact the current recession has had on housing construction.
- The number of building permits issued (housing starts) during this current reporting period was 1,237, slightly more than the 1,157 permits issued the previous year which was the smallest annual amount since 1979, the earliest year for which DPZ has permit data.
- Of the 1,163 completed units, 29% were for single family detached, 38% for single family attached and 33% 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.
- About 33% of all units were built in Elkridge, another 28% in Ellicott City, 18% in the Southeast, 10% each in Columbia and the Rural West. (See map on Page 6 that show these five planning areas.)
- Last year, there was potential for 569 units from recorded lots and 576 units approved in site development plans (Chart 2). This compares to five year annual averages of 1,304 units from recorded lots and 1,424 units in approved site development plans and is another indicator of the slowing housing market.
- As of September 30, 2009 there were 7,338 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 7,557 units in process one year earlier (September 30, 2008).

Chart 1
Issued Use & Occupancy Permits by Unit Type
 10/1/04 to 9/30/09

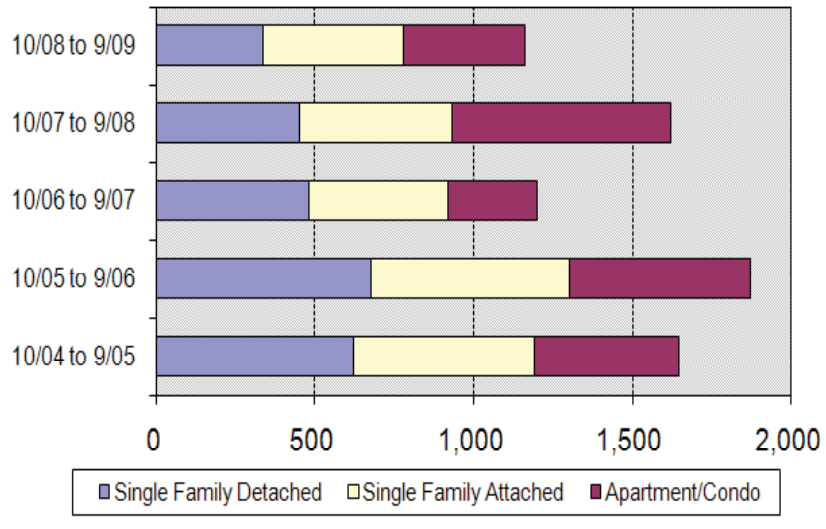
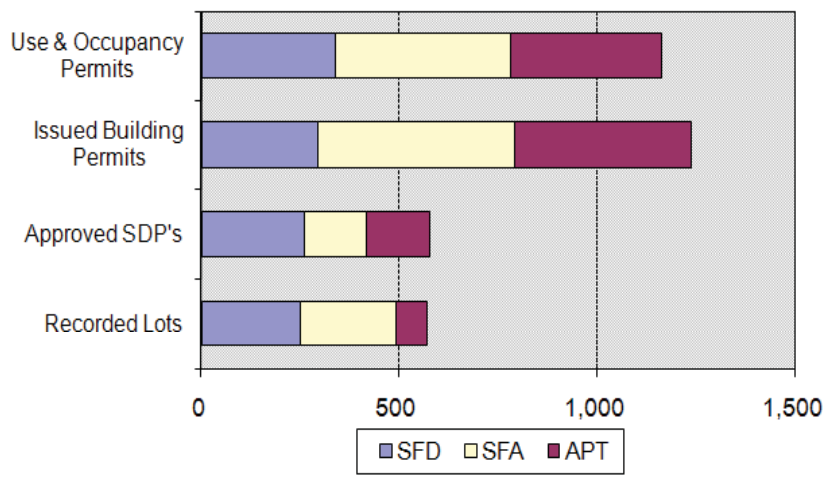


Chart 2
Housing Units
 10/01/08 to 9/30/09



- A significant number of the in-process units – 5,464 or 75% of the total 7,338 – are part of phased projects with development planned as far out as 2019. Some of the larger phased plans include Maple Lawn and Westover Glen in the Southeast; The Overlook at Blue Stream, Howard Square, and Shipley’s Grant in Elkridge; and Turf Valley and the Courtyards in Ellicott City.

- Countywide, 30% of the units in process on September 30, 2009 were single family detached units. About 29% were single family attached units and another 42% were apartment units (including both condo and rental).

Age-Restricted Units

- There were 277 age-restricted housing units built last year, 24% of the total 1,163 units built in the County. These 277 units consisted of 1 SFD unit, 89 townhouse units and 187 apartment or condo units. About 55% of these were built in Ellicott City, 31% in the Southeast, 11% in Columbia, and 3% in the Rural West.

- As of September 30, 2009 there were 1,187 age-restricted units in the planning process – 247 single family detached units, 248 townhouse units and 692 apartment or condo units. About 70% these are in Ellicott City, 15% in Columbia, 12% in the Southeast, and 3% in Elkridge. For the last reporting period there were 1,336 age-restricted units in process, 149 more than the current year.

Moderate Income Housing Units

- Last year there were 36 MIHU units in approved plans - 23 townhouse units in Elkridge and 13 apartment units in the Southeast. This is much less than the 361 approved MIHU units the previous year.

- As of September 30, 2009 there were 637 MIHU units in process – 10 single family detached, 125 townhouse units and 502 apartment or condo units. About 77% of the units are in Elkridge, 10% in Ellicott City. 8% in Columbia and 4% in the Southeast. By comparison, there were 628 MIHU units in process one year earlier.

- Of the 637 MIHU units in process, 87 are age-restricted. This is about 14% of all MIHU units in process and includes 76 apartment or condo units and 11 townhouse units.

Rural Land Preservation

- For the current 08/09 reporting period, 308 acres of agricultural and environmentally sensitive land were permanently preserved in the Rural West. This includes 36 acres purchased through the Howard County Agricultural Land Preservation program. The other 272 acres were preserved as a result of subdivision activity using the cluster subdivision zoning regulations and Density/Cluster Exchange Options (DEO/CEO).
- Since 1992, 14,222 acres have been subdivided in the Rural West using the DEO/CEO and cluster subdivision zoning regulations. About 72% of this total, 10,260 acres, has gone into preservation. The remaining 28%, 3,962 acres, has been developed or is planned for development on 3,210 lots and 391 acres of roadway.
- Preservation easements in the Rural West have been steadily increasing and now total 27,704 acres. This includes 20,347 acres of agricultural preservation easements and 7,357 acres of environmental preservation parcels dedicated through the subdivision process. This totals about 29% 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

- Average home prices declined 10.7% last year. For the year prior they had fallen by 4.1%, They had fallen slightly less than 1% the year before that, which was the first time prices have fallen for at least 15 years.
- The median price for a single family detached house decreased by \$62,000, from \$525,000 in 07/08 to \$463,000 in 08/09, a 11.8% reduction. Townhouse units decreased by about \$27,000, from \$337,000 to \$310,000 (8.0%). Condo units dropped by \$34,000, from \$252,000 to \$218,000 (13.5%).
- Total new and existing home sales continue to drop, from over 3,864 units sold in 07/08 to only about 3,403 last year. This is a 12% one year decline. Compared to four years ago, a peak sales year when over 6,900 homes were sold, it was a 50% decline, clearly reflecting the slowing market.

Non-Residential Development

- Last year, a little more than 1 million square feet of building space were approved in site development plans. Building permits were issued for close to 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 the peak of more than 3.5 million square feet in the 2004/05 year.
- Over the last five years, there were an average of 2.3 million square feet in approved site development plans and 2.3 million square feet in issue building permits.
- Most of the new building space is located in Columbia, ElkrIDGE, and the Southeast. Comparably less space is located in Ellicott City and the Rural West.
- As of September 30, 2009, there were 1.7 million square feet in-process in site development plans. This is 21% more than the 1.5 million square feet in process the previous year, a positive sign.
- According to the State Department of Labor, Licensing and Regulation, the County lost 5,300 jobs last year (1st quarter 2008 to 1st quarter 2009 statistics), a 3.6% annual decline.

Chart 3
Non-Residential Square Feet (X 1,000)
10/1/08 to 9/30/09

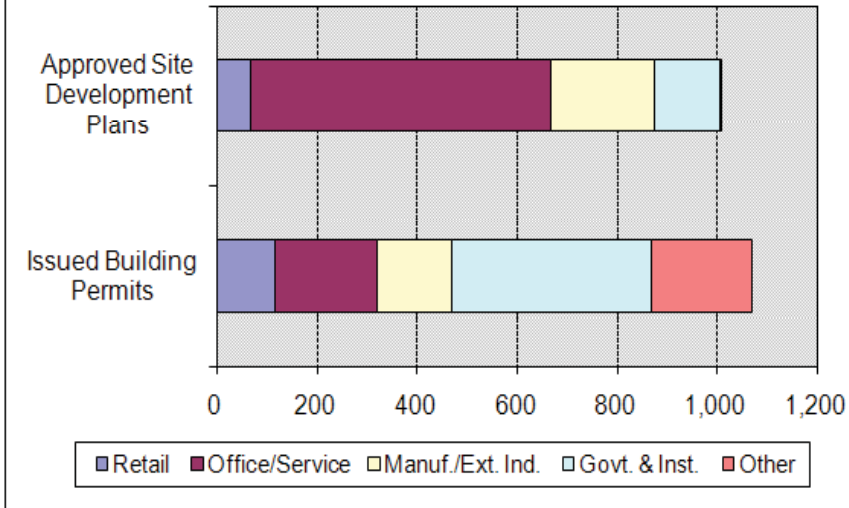
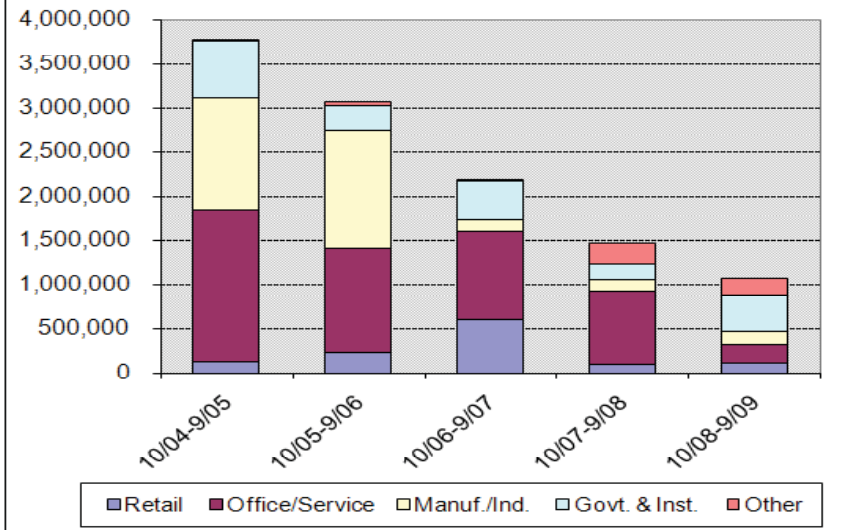
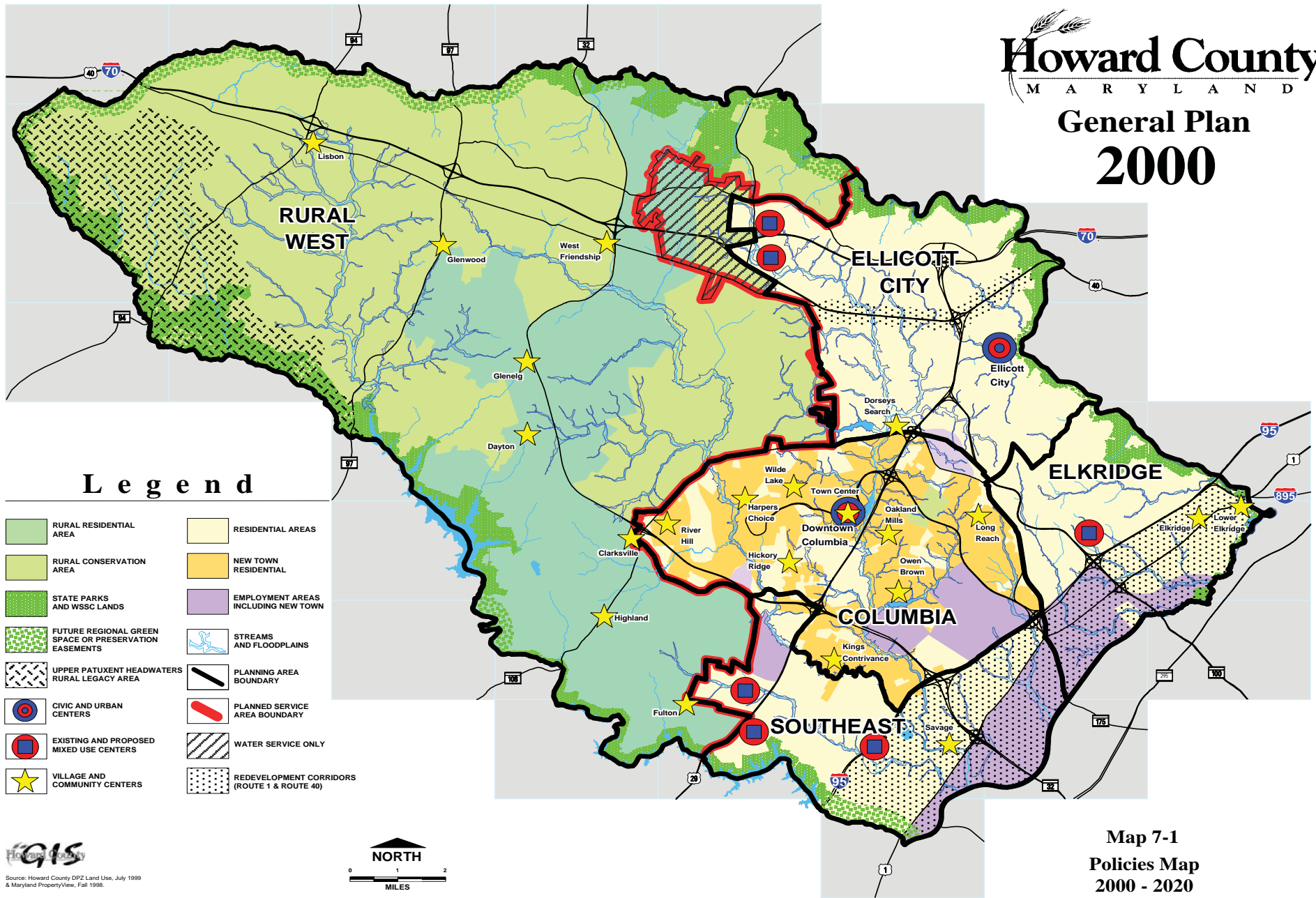


Chart 4
Sq. Ft. in Issued Building Permits
10/1/04 to 9/30/09



Howard County MARYLAND

General Plan 2000



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

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 three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- a consolidated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review (four buildable lots or less) involving only 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 2004, 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. Annual data for development activity are reported for the period October 1 through September 30.

Summary of Last Year

Last year there was potential for 569 housing units from recorded lots countywide in 116 subdivision plans totaling 2,678 acres (Table 1). The Southeast had the most with 229 units, 40% of the total. Elkrige had potential for 167 units, 29% of the total. The Rural West has the potential for 129 new units followed by Ellicott City with 38 units. Columbia had only 6 units in recorded plans. These represent net new unit potential and do not include total recorded lots from resubdivisions. For example,

resubdivisions may combine existing lots to create a smaller number of new lots compared to the original. Or subdivisions may be recorded to simply adjust lot lines or add easements. If known, condo townhouse or apartment units are included in the unit total for large parcel recordations.

Of the total 2,678 acres recorded, 1,968 acres, or about 73%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity. A significant amount were 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 2 shows new units from recorded lots by unit type. Of the 569 units from recorded lots, 249 are for single family detached units (SFD), 243 are for single family attached or townhouse units (SFA) and 77 are for apartment units. This represents 44, 43 and 14% of the total units, respectively. Chart 5 shows these results graphically by Planning Area.

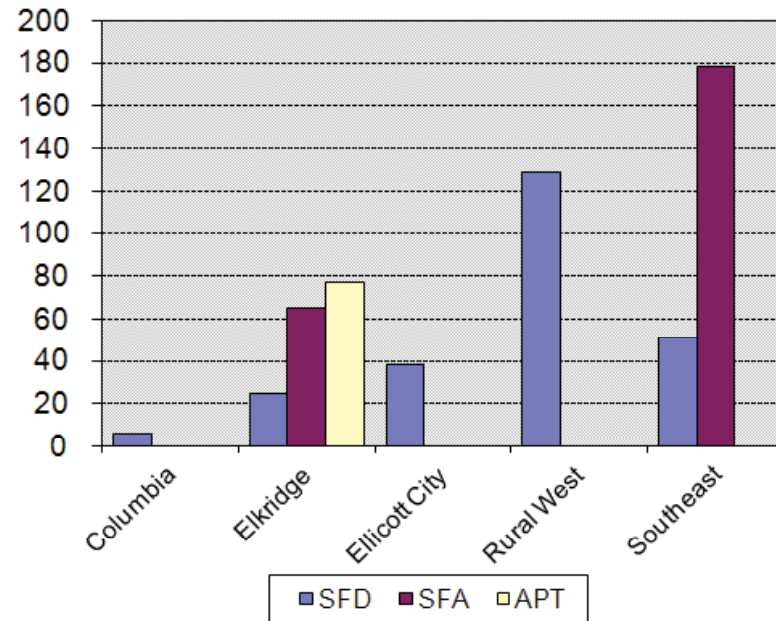
Table 1
Recorded Residential Subdivisions, 10/01/08 to 9/30/09

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	6	1%	5	4%	8	0%
Elkridge	167	29%	17	15%	144	5%
Ellicott City	38	7%	23	20%	381	14%
Rural West	129	23%	45	39%	1,968	73%
Southeast	229	40%	26	22%	177	7%
TOTAL	569	100%	116	100%	2,678	100%

Table 2
Unit Potential from Recorded Lots by Unit Type, 10/01/08 to 9/30/09

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	6	0	0	0	6	1%
Elkridge	25	65	77	0	167	29%
Ellicott City	38	0	0	0	38	7%
Rural West	129	0	0	0	129	23%
Southeast	51	178	0	0	229	40%
TOTAL	249	243	77	0	569	100%
PERCENT	44%	43%	14%	0%	100%	

Chart 5
New Unit Potential From Recorded Lots
10/1/08 to 9/30/09



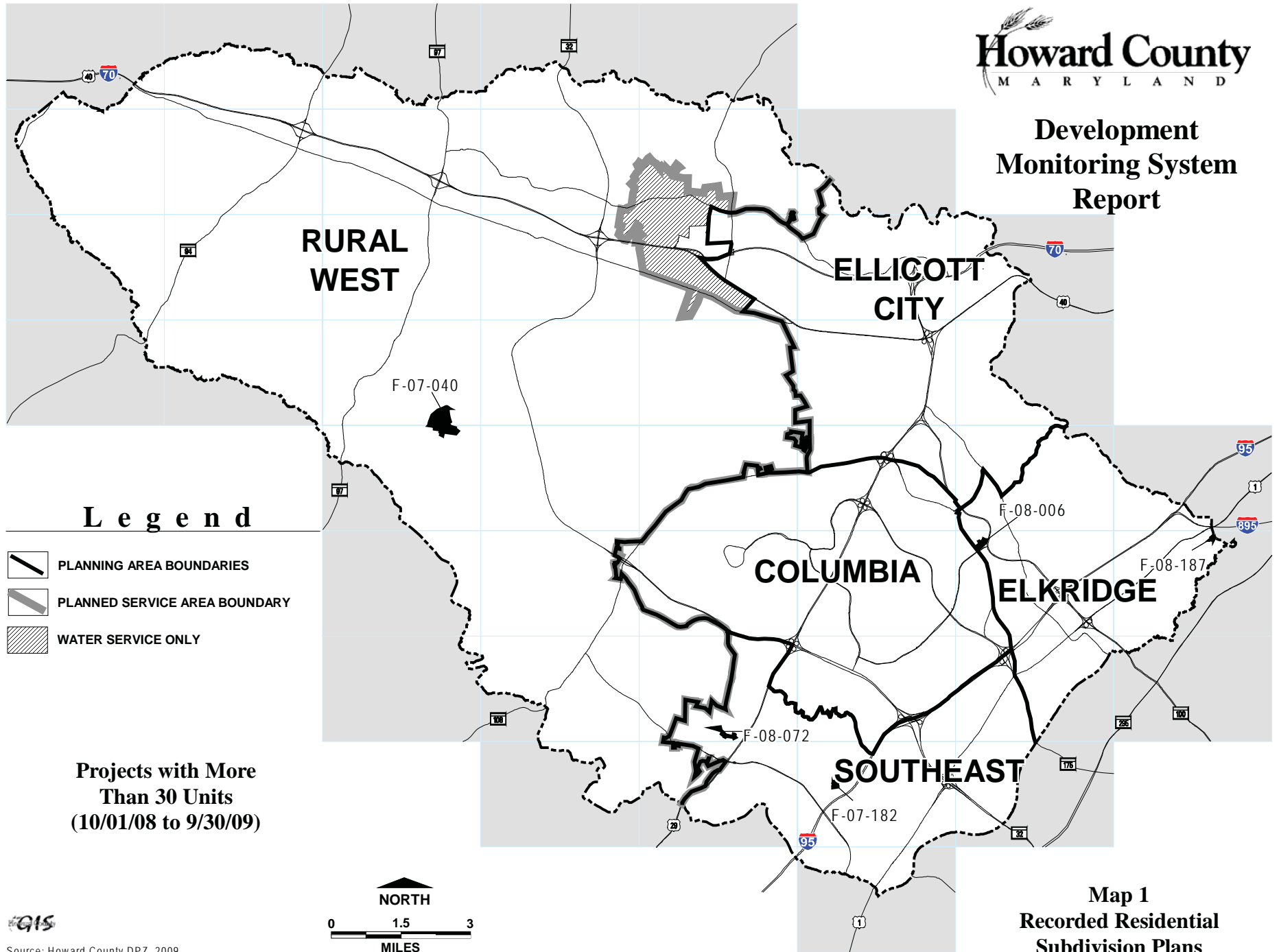
Last Year's Projects - Greater than 30 Units

Of the total 569 units from lots recorded last year, 380 or about 67% were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 3, are located in three of the five planning areas. The precise location of these plans are shown on Map 1.

These larger plans include Maple Lawn and Emerson in the Southeast, Riverwatch and Shipley's Grant Phase 3 in Elkridge, and the Warfields II in the Rural West.



Development Monitoring System Report



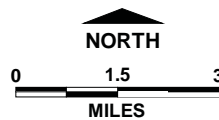
Legend

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

Projects with More Than 30 Units (10/01/08 to 9/30/09)



Source: Howard County DPZ, 2009.



Map 1
Recorded Residential Subdivision Plans

Table 3
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/08 to 9/30/09

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-08-187	Riverwatch	APT & MIHU APT	77	142
	F-08-006	Shipley's Grant - Phase 3	SFA & MIHU SFA	65	
Rural West	F-07-040	The Warfields II, Sec. 2	SFD	60	60
Southeast	F-08-072	Maple Lawn Farms	SFA	100	178
	F-07-182	Emerson	SFA	78	
TOTAL					380

Five Year Results

Table 4 shows the recorded subdivisions for the last five years from October 1, 2004 to September 30, 2009. Over this five year period lots for 6,521 units countywide in 798 subdivision plans totaling 22,098 acres were recorded. This equates to a five year average of 1,304 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 purpose of adding easements or adjusting parcel lines.

Table 5 summarizes the number of units from recorded lots by unit type for each of the last five years. Over the last five years, recorded lots created the potential for 2,487 single family detached units, 38% of the total 6,521. A total of 1,734, 27%, were for single family attached units and the remaining 2,300, 35%, were for apartments units. (As indicated earlier, these represent net new unit potential from recordations and do not include totals from resubdivisions.)

Table 4
Recorded Residential Subdivisions, 10/01/04 to 9/30/09

Year	Units	Plans	Acreage
10/04 to 9/05	1,075	149	2,554
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	2,678
TOTAL	6,521	798	22,098
5 YEAR AVG.	1,304	160	4,420

Table 5
Unit Potential From Recorded Lots by Unit Type, 10/01/04 to 9/30/09

Year	SFD	SFA	APT	MH	Total
10/04 to 9/05	573	392	110	0	1,075
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
TOTAL	2,487	1,734	2,300	0	6,521
PERCENT	38%	27%	35%	0%	100%
5 YEAR AVG.	497	347	460	0	1,304

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 three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- a consolidated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review involving only a final plan.

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of September 30, 2009 are tabulated and compared with those in process a year earlier (as of September 30, 2008).

Number of Plans

Thirty less residential plans were in process as of September 30, 2009 than there were one year earlier – 214 plans in 2009 compared to 244 plans in 2008 (Table 6).

For the current year, the Rural West had the greatest number of residential plans in process with 69, followed by the Elkridge with 51. Ellicott City and the Southeast had 43 and 34 plans in process, respectively. Columbia had 17 plans in process.

Of the 214 plans in process on September 30, 2009, 161 were final plans, 13 were sketch plans, 31 were preliminary equivalent sketch plans and 9 were preliminary plans.

Number of Potential Units

There were slightly less potential units in process as of September 30, 2009 compared to a year earlier – 7,338 units compared to 7,557 units (Table 7).

It is important to note that a significant number of the 7,338 potential units

Table 6
Number of Residential Subdivision Plans in Process, 09/30/09
(With comparisons to Countywide total as of 09/30/08)

Planning Area	Preliminary Equivalent				TOTAL PLANS
	Sketch	Sketch	Preliminary	Final	
Columbia	0	3	0	14	17
Elkridge	8	11	4	28	51
Ellicott City	3	7	2	31	43
Rural West	0	9	0	60	69
Southeast	2	1	3	28	34
TOTAL	13	31	9	161	214
As of 09/30/08	15	33	10	186	244

in process are part of phased projects with building planned for future years. Phasing is sometimes a developer's preference, but usually results from APFO regulations that limit the number of allocations available each year. As shown in Table 8, 5,464 units are part of phased plans, with building planned as far out as 2019 (in the case of Elkridge Village Centre, now known as Howard Square). This represents 74% of the total units in process.

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

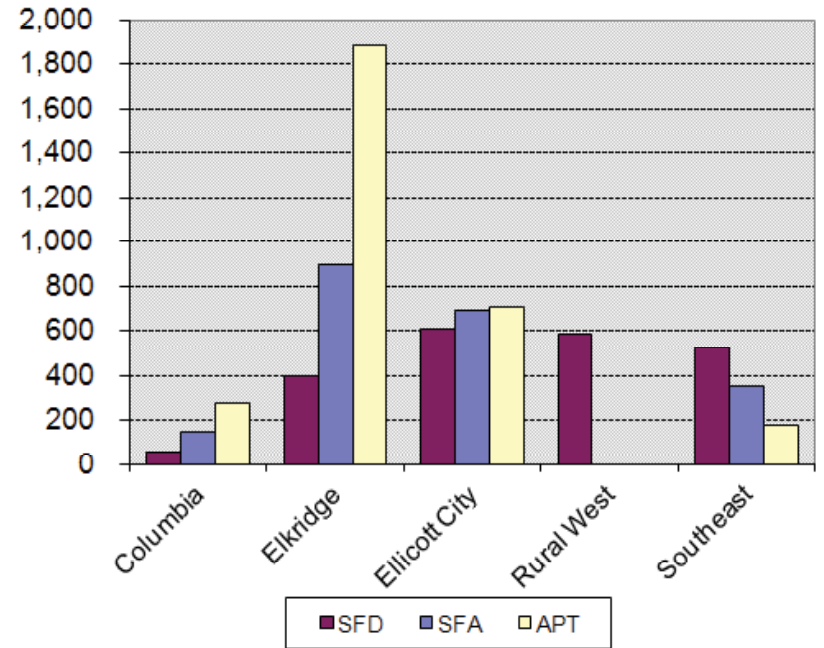
As reflected in Table 7, 30% of the units in process are single family detached units. About 29% are single family attached units and another 42% are apartment units. Table 9 shows details by plan stage and unit type for this year by planning area. Chart 6 graphically illustrates the units in process by unit type for each planning area.

Table 7

**Number of Potential Units from Subdivision Plans in Process, 09/30/09
(With comparisons to Countywide total as of 09/30/08)**

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	62	150	281	0	493
Elkridge	397	898	1,886	0	3,181
Ellicott City	609	696	710	0	2,015
Rural West	589	0	0	0	589
Southeast	530	351	179	0	1,060
TOTAL	2,187	2,095	3,056	0	7,338
PERCENT	30%	29%	42%	0%	100%
As of 09/30/08	2,347	2,230	2,980	0	7,557

**Chart 6
Subdivisions in Process - New Unit Potential
9/30/09**



**Table 8
Potential Units from Phased Projects**

Planning Area	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	TOTAL
Columbia	0	0	20	40	80	70	52	0	0	0	262
Elkridge	488	219	338	317	219	290	266	266	150	150	2,703
Ellicott City	195	219	237	224	296	205	132	0	0	0	1,508
Southeast	53	66	174	160	128	151	80	41	0	0	853
Rural West	45	45	48	0	0	0	0	0	0	0	138
TOTAL	781	549	817	741	723	716	530	307	150	150	5,464

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

Table 9
Number of Potential Units from Subdivision Plans in Process by Unit Type, 09/30/09

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	14	150	112	0	276
Elkridge	105	288	1,230	0	1,623	172	0	0	0	172
Ellicott City	351	394	316	0	1,061	50	93	0	0	143
Rural West	0	0	0	0	0	185	0	0	0	185
Southeast	345	161	63	0	569	4	0	0	0	4
TOTAL	801	843	1,609	0	3,253	425	243	112	0	780

Planning Area	Preliminary					Final					TOTAL - 09/30/09				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	48	0	169	0	217	62	150	281	0	493
Elkridge	8	59	0	0	67	112	551	656	0	1,319	397	898	1,886	0	3,181
Ellicott City	33	2	122	0	157	175	207	272	0	654	609	696	710	0	2,015
Rural West	0	0	0	0	0	404	0	0	0	404	589	0	0	0	589
Southeast	72	108	0	0	180	109	82	116	0	307	530	351	179	0	1,060
TOTAL	113	169	122	0	404	848	840	1,213	0	2,901	2,187	2,095	3,056	0	7,338

Number of Acres

As of September 30, 2009 a total of 6,637 acres of residential land were in the subdivision process. This is more than 1,000 acres less compared to the previous year, at which time there were 7,763 acres in process (Table 10).

Major Projects

Table 11 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive or phased projects. Map 2 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, Maple Lawn Farms, and Westover Glen. These major projects include 6,145 units which account for 84% of the total 7,338 units in the subdivision process.

Table 10
Acres of Residential Subdivision Plans in Process, 09/30/09
(With comparisons to Countywide total as of 09/30/08)

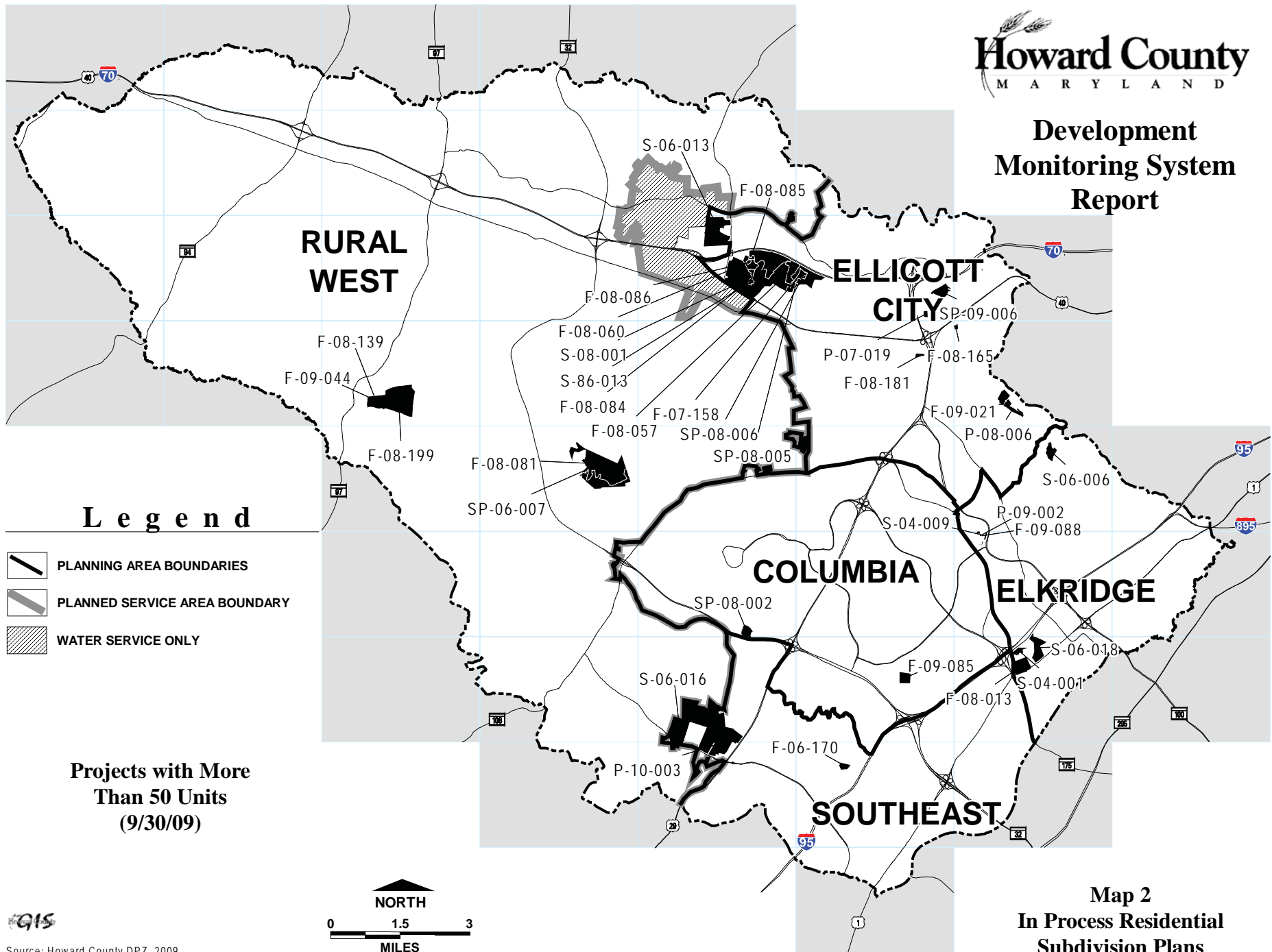
Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Columbia	0	40	0	46	86
Elkridge	107	181	137	238	663
Ellicott City	360	77	41	736	1,214
Rural West	0	745	0	3,467	4,212
Southeast	264	29	31	139	463
TOTAL	730	1,072	209	4,626	6,637
As of 09/30/08	733	1,164	314	5,552	7,763

**Table 11
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 09/30/09**




Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SP-08-002	Riverdale	SFA, APT - 27 MIHU, 112 Age Rest.	262	431
	F-09-085	Guilford Gardens	APT - 27 MIHU, 45 Age-Rest.	169	
Elkridge	S-06-018	The Overlook at Blue Stream	SFA, APT - 202 MIHU	1,345	2,776
	F-08-013	Howard Square	SFA, APT - 252 MIHU	1,067	
	S-04-001	Village Towns	SFA, APT - 8 MIHU	90	
	S-04-009	Shipley's Grant - Phase 6	SFA, APT - 6 MIHU	83	
	S-06-006	Locust Chapel	SFD	67	
	F-09-088	Shipley's Grant - Phase 4	SFA, APT - 4 MIHU	65	
	P-09-002	Shipley's Grant - Phase 5	SFA - 8 MIHU	59	
	Ellicott City	S-86-013	Turf Valley - Remaining Phases	SFD, SFA, APT	
S-06-013		The Courtyards at Waverly Woods - West	SFD, SFA - Age Restricted	340	
F-08-060/F-08-084,-85,-86		Villages at Turf Valley	SFD, SFA, APT	177	
F-08-165		Alta at Regency Crest	APT - Age Restricted, 15 MIHU	150	
S-08-001		Turf Valley Clubhouse	SFD, APT	128	
P-07-019		The Meadows at Ellicott City III	APT, 15 MIHU	122	
SP-08-005/SP-08-006/F-07-158		Fairways at Turf Valley	SFA	98	
F-09-021/P-08-006		Autumn River	SFD, SFA	93	
F-08-057		Vantage Condominiums at Turf Valley	APT	69	
SP-09-006		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 & 3	SFD	138	197
	F-08-199/F-08-139/F-09-044	Meriwether Farm	SFD	59	
Southeast	S-06-016	Maple Lawn Farms - Future Phases	SFD, SFA, APT	560	850
	F-06-170	Westover Glen	APT, SFA - Age Restricted - 15 MIHU	143	
	P-10-003	Maple Lawn Farms - Hillside District	SFA	147	
TOTAL					6,145



Development Monitoring System Report



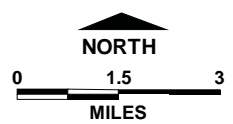
Legend

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

Projects with More Than 50 Units (9/30/09)



Source: Howard County DPZ, 2009.



**Map 2
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. The analysis includes last year's site development plan activity as well as activity for the last five years.

Summary of Last Year

Last year there were 576 housing units approved in 47 site development plans totaling about 154 acres (Table 12). The Southeast had 265 approved units followed by Elkridge with 148, Ellicott City with 146, and Columbia with 17.

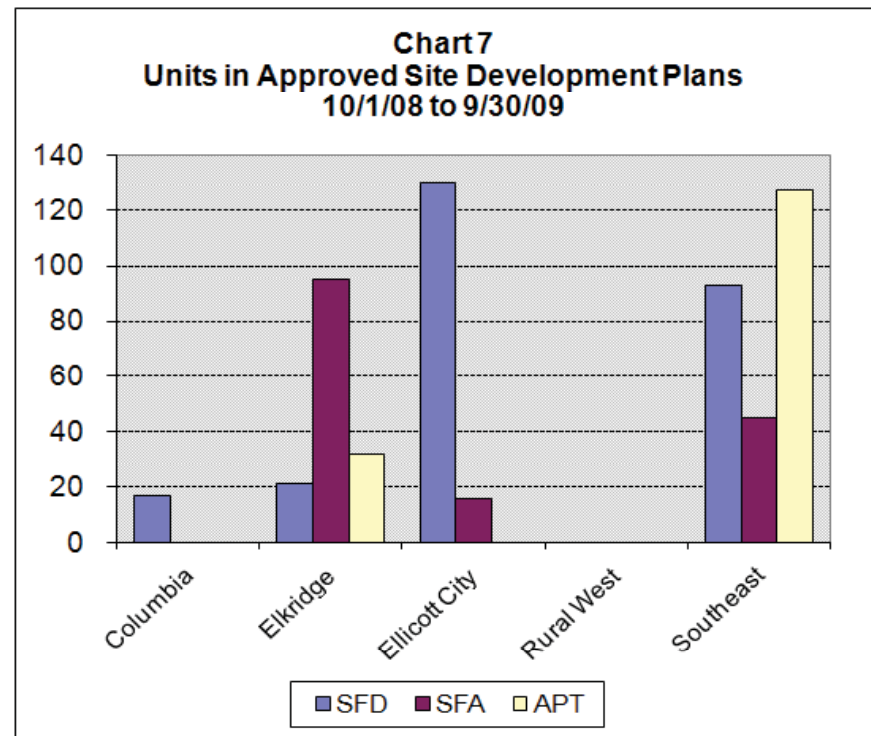
Table 13 shows new units from approved site development plans by unit type. Of the 576 approved units, 45% were for single family detached units, 27% were for single family attached or townhouse units and 28% for apartment units. Chart 7 shows these results graphically.

Table 12
Approved Residential Site Development Plans, 10/01/08 to 9/30/09

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	17	3%	4	9%	13	8%
Elkridge	148	26%	11	23%	35	23%
Ellicott City	146	25%	17	36%	48	31%
Rural West	0	0%	1	2%	22	14%
Southeast	265	46%	14	30%	36	23%
TOTAL	576	100%	47	100%	154	100%

Table 13
Approved Units from SDP's by Unit Type, 10/01/08 to 9/30/09

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	17	0	0	0	17	3.0%
Elkridge	21	95	32	0	148	25.7%
Ellicott City	130	16	0	0	146	25.3%
Rural West	0	0	0	0	0	0.0%
Southeast	93	45	127	0	265	46.0%
TOTAL	261	156	159	0	576	100.0%
PERCENT	45%	27%	28%	0%	100%	



Last Year's Projects - Greater than 50 Units

Of the total 576 units approved in site development plans last year, 313 or about 54% were in site development plans consisting of more than 50 units. These larger projects, shown in Table 14, are located in three planning areas. The location of these plans are shown on Map 3.

Five Year Results

Tables 15 and 16 show the approved residential site development plans for the last five years from October 1, 2004 to September 30, 2009. Over this five year period 7,122 units were approved countywide in 381 site development plans totaling about 1,277 acres.

Last year, with only 576 approved units, had the smallest number of all five years, and about only one-third of the 1,563 units approved in the prior year.

Table 14
Approved Residential SDP's, Projects With More Than 30 Units, 10/01/08 to 9/30/09

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	SDP-06-070	Duckett's Ridge	SFA - 6 MIHU	52	127
	SDP-08-046	Elkridge Village Center	SFA - 11 MIHU	43	
	SDP-04-152	Elkridge Town Center - Phase 4	APT	32	
Ellicott City	SDP-09-056	Worthington Fields	SFD	59	59
Southeast	SDP-08-057	Cherrytree Park	APT - Age Restricted - 13 MIHU	127	127
TOTAL					313

Table 15
Approved Units in Residential Site Development Plans, 10/01/04 to 9/30/09

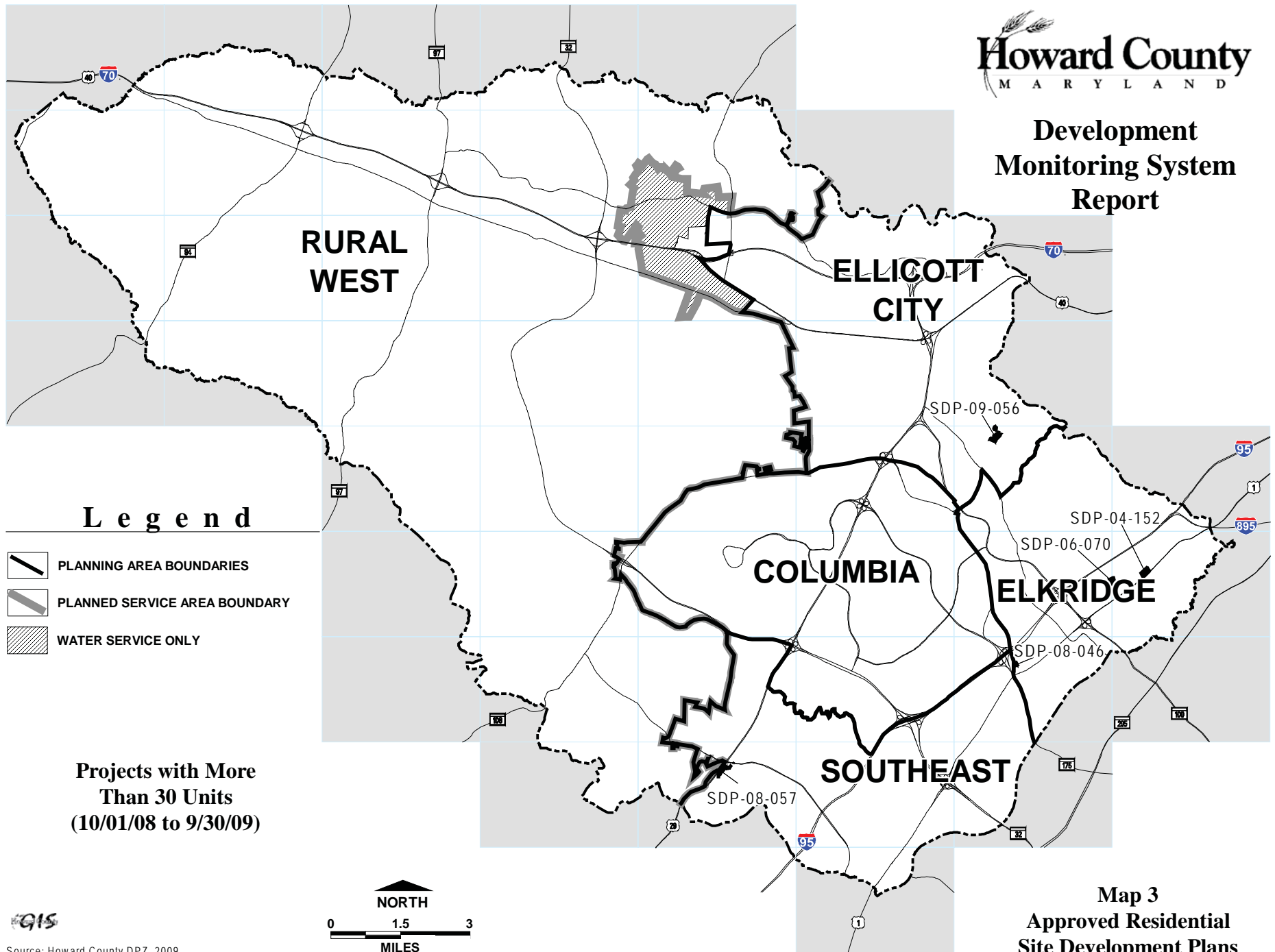
Year	SFD	SFA	APT	MH	Total
10/04 to 9/05	524	708	392	0	1,624
10/05 to 9/06	337	359	290	0	986
10/06 to 9/07	341	917	1,076	39	2,373
10/07 to 9/08	285	466	812	0	1,563
10/08 to 9/09	261	156	159	0	576
TOTAL	1,748	2,606	2,729	39	7,122
PERCENT	25%	37%	38%	1%	100%
5 YEAR AVG.	350	521	546	8	1,424

Table 16
Approved Residential Site Development Plans, 10/01/04 to 9/30/09

Year	Units	Plans	Acreage
10/04 to 9/05	1,624	91	345
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
TOTAL	7,122	381	1,277
5 YEAR AVG.	1,424	76	255



Development Monitoring System Report



Legend

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

Projects with More
Than 30 Units
(10/01/08 to 9/30/09)



Source: Howard County DPZ, 2009.

Map 3
Approved Residential
Site Development Plans

In-Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of plans, potential units and acreage currently being processed as of September 30, 2009 are tabulated and compared to those in process a year earlier (as of September 30, 2008). 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 less residential site development plans in process as of September 30, 2009 compared to one year earlier, 36 plans compared to 54 plans (Table 17).

Table 17

Number of Residential SDP's In Process, 09/30/08 & 09/30/09

Planning Area	2009	2008
Columbia	4	6
Elkridge	15	16
Ellicott City	8	15
Rural West	0	0
Southeast	9	17
TOTAL	36	54

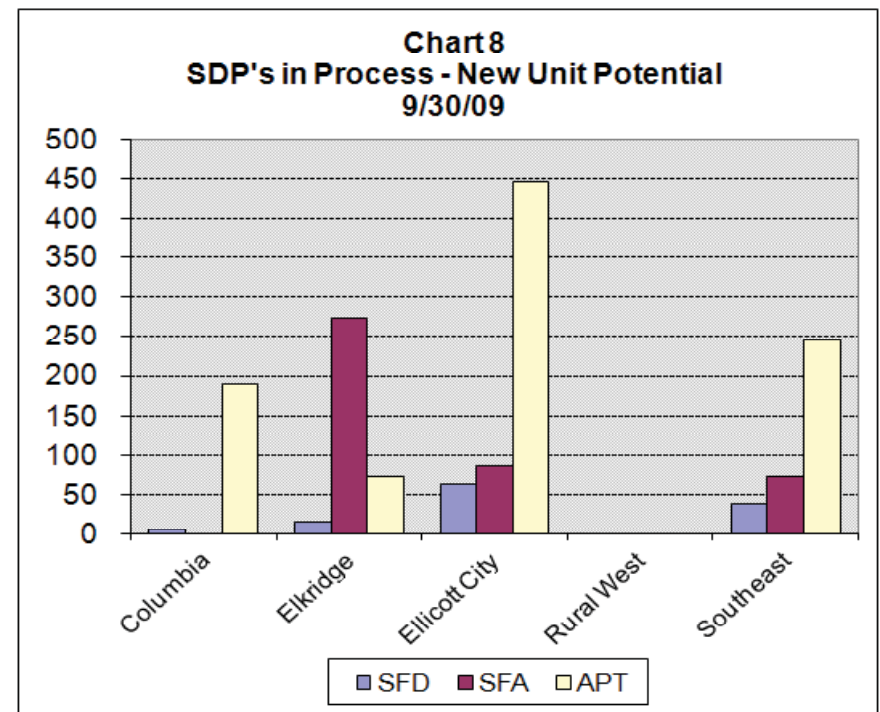
Number of Potential Units

There were slightly less units in process as of September 30, 2009 compared to a year earlier, 1,507 units compared to 1,517 units (Table 18). The greatest number of units in process are for apartments (including rental and condo) with 954 proposed units in 2009. This is followed by 432 proposed single family attached or townhouse units and 121 single family detached units. Chart 8 graphically illustrates the units in process by unit type for the current year by planning area.

Table 18

**Number of Potential Units from Site Development Plans in Process, 09/30/09
(With comparisons to Countywide total as of 09/30/08)**

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
	Columbia	5	0	189	
Elkridge	15	273	73	0	361
Ellicott City	63	87	446	0	596
Rural West	0	0	0	0	0
Southeast	38	72	246	0	356
TOTAL	121	432	954	0	1,507
As of 09/30/08	167	494	856	0	1,517



Number of Acres

As of September 30, 2009 a total of 405 acres of residential land were in the site development plan process. This is more than the previous year when there were 295 acres in process (Table 19).

Major Projects

Table 20 shows a list of potential units from larger projects with 30 units or more. Map 4 shows the location of these projects. Of the 1,507 units in the site development plan process, 1,381 or about 92% were in projects with 30 units or more. About half of the units in these larger projects are part of age-restricted developments

Table 19
Acreeage of Residential SDP's In Process, 09/30/08 & 09/30/09

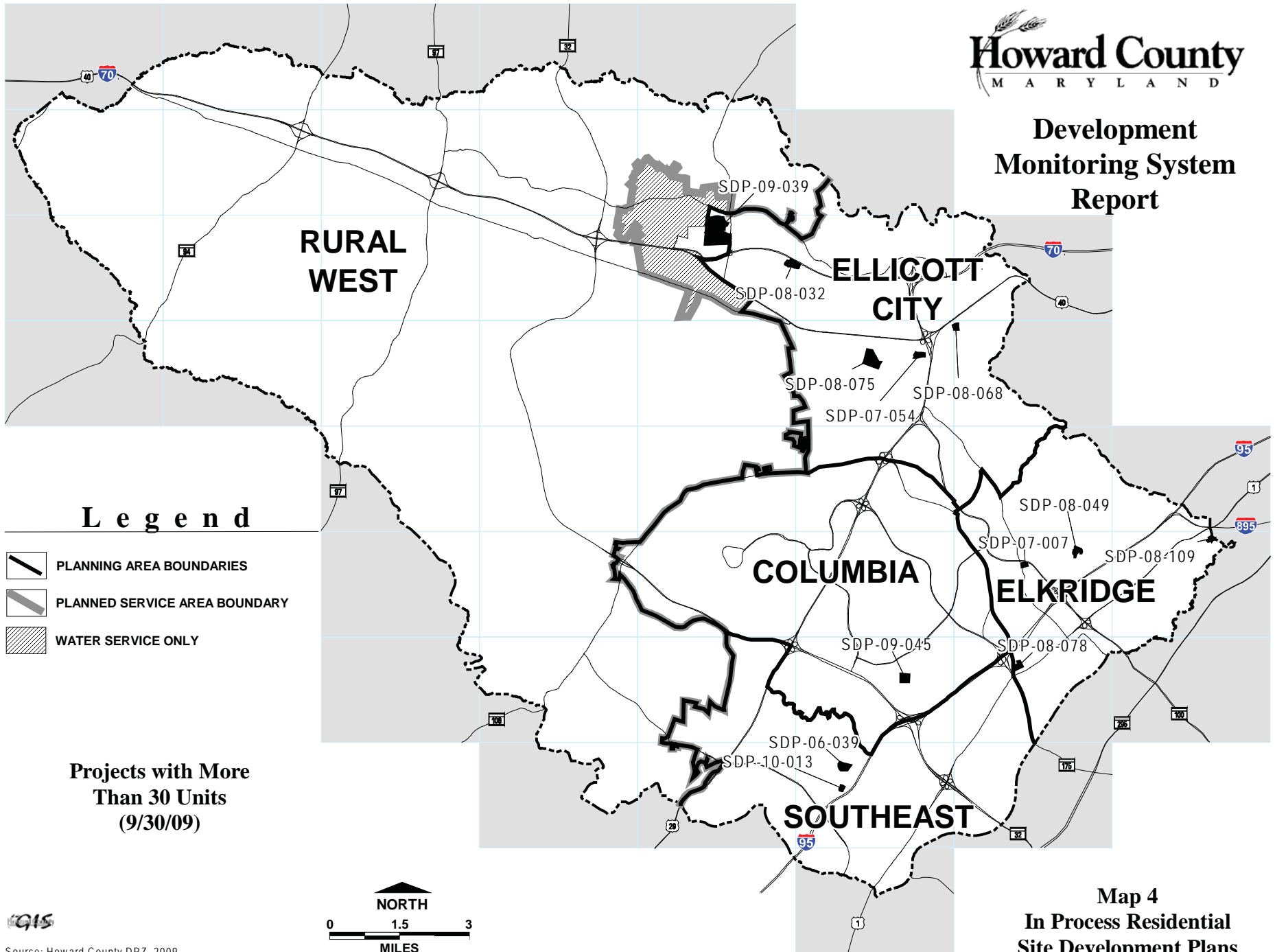
Planning Area	2009	2008
Columbia	26	20
Elkridge	44	76
Ellicott City	297	133
Rural West	0	0
Southeast	38	66
TOTAL	405	295

Table 20
In Process Residential Site Development Plans, Projects With More Than 30 Units, 9/30/09

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-09-045	Guilford Gardens	APT, APT - Age Restricted - 27 MIHU	169	169
Elkridge	SDP-08-078	Elkridge Village Centre	SFA - 41 MIHU	185	326
	SDP-08-109	Riverwatch	APT - 12 MIHU	73	
	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	SFD, APT - Age Restricted - 29 MIHU	284	583
	SDP-08-068	Alta at Regency Crest	APT - Age Restricted - 15 MIHU	150	
	SDP-07-054	Villas of Dunloggin	SFA - Age Restricted - 6 MIHU	51	
	SDP-09-039	Waverly Woods - Courtyards West	SFD, SFA - Age Restricted	50	
	SDP-08-032	Vantage Condominiums at Turf Valley	APT	48	
Southeast	SDP-10-013	The Enclave at Emerson Apartments	SFA, APT	164	303
	SDP-06-039	Westover Glen	SFA, APT - Age Restricted - 15 MIHU	139	
TOTAL					1,381



Development Monitoring System Report



Source: Howard County DPZ, 2009.



Residential Building Permits & Use and Occupancy Permits

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

Issued Building Permits

Summary of Last Year

Last year from October 1, 2008 to September 30, 2009, the County issued 1,237 residential building permits for new construction (Table 21). This is the second smallest number of issued permits since tracking for the Development Monitoring System began in 1991. Last year had the smallest with only 1,157 permits issued. The Southeast had the greatest number issued with 458, followed by Ellicott City and then Elkridge. Countywide, 24% of the permits were for single family units. About 40% were for townhouse units and 36% for apartment units. Chart 9 shows these results graphically by planning area.

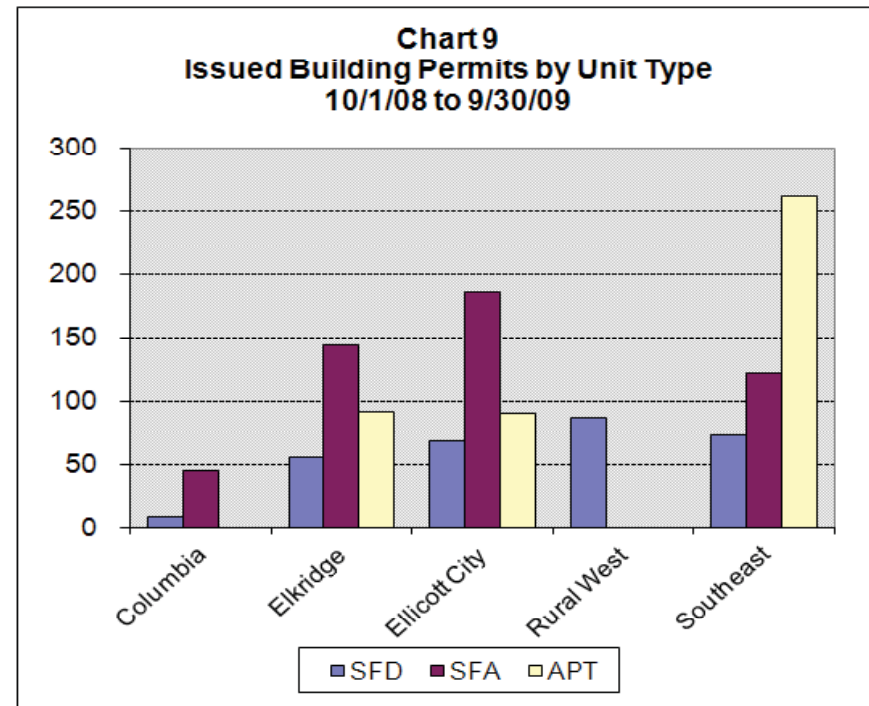


Table 21

Issued Residential Building Permits by Unit Type, 10/01/08 to 9/30/09

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	9	45	0	0	54	4%
Elkridge	56	144	92	0	292	24%
Ellicott City	69	186	91	0	346	28%
Rural West	87	0	0	0	87	7%
Southeast	73	122	262	1	458	37%
TOTAL	294	497	445	1	1,237	100%
PERCENT	24%	40%	36%	0%	100%	

Last Year's Projects - Greater than 25 Units

Table 22 summarizes the issued residential building permits in larger subdivisions with more than 25 units. About 70%, or 864 of the total 1,237 permits issued last year, fall into this category. Map 5 shows the locations of each of the subdivisions.

Five Year Results

Over five years, from October 1, 2004 to September 30, 2009, a total of 7,307 residential permits have been issued in Howard County (Table 23). This is an average of 1,461 permits per year.

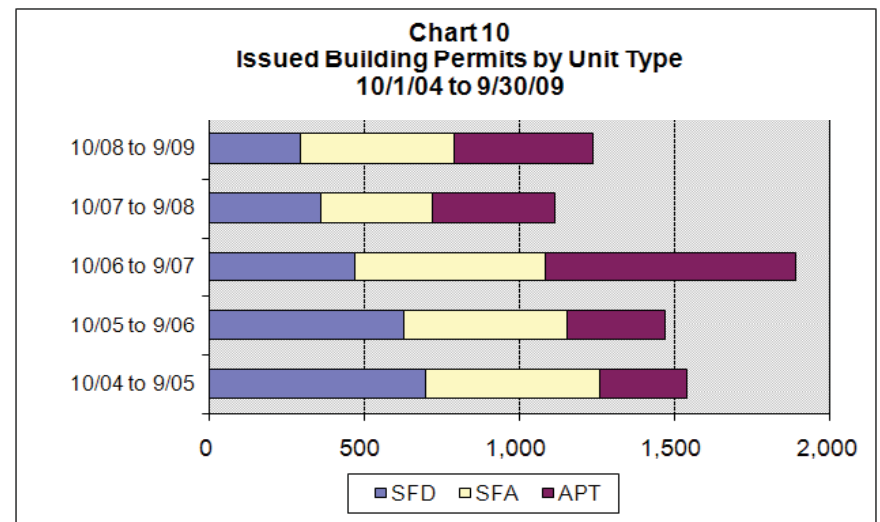
Of the 7,307 total permits issued over five years, 2,457, or 34%, were for single family detached units. There were 2,557 permits (35%) for single family attached units and 2,234 permits (31%) for apartment units (both rental and condo). Chart 10 shows the results by unit type graphically over time.

Table 22
Issued Residential Building Permits in
Subdivisions With More Than 25 Units, 10/01/08 to 9/30/09

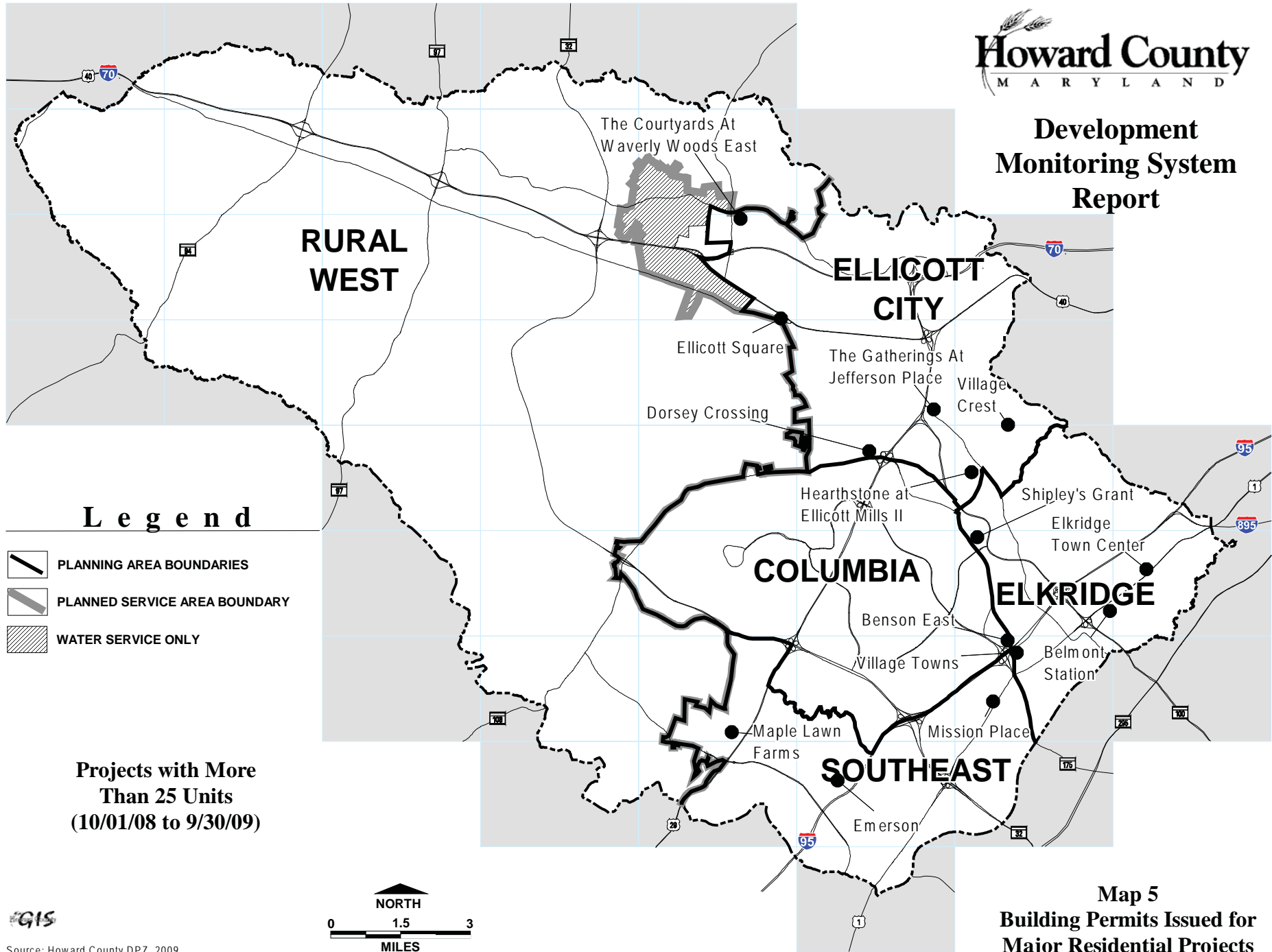
Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Benson East	Townhomes	34	34
Elkridge	Elkridge Town Center Belmont Station Village Towns Shipley's Grant	Apartments	92	219
		Townhomes	50	
		Townhomes	44	
		Townhomes	33	
Ellicott City	Dorsey Crossing The Courtyards At Waverly Woods East Village Crest Ellicott Square Hearthstone at Ellicott Mills II The Gatherings At Jefferson Place	Townhomes	55	238
		Townhomes/Apartments-Age Restricted	48	
		Townhomes/Apartments-Age Restricted	46	
		Townhomes	34	
		Townhomes-Age Restricted	28	
		Apartments-Age Restricted	27	
Southeast	Mission Place Maple Lawn Farms	Townhomes/Apartments	299	373
		Single-Family Detached/Townhomes	74	
TOTAL				864

Table 23
Issued Residential Building Permits by Unit Type, 10/01/04 to 9/30/09

Year	SFD	SFA	APT	MH	Total
10/04 to 9/05	699	561	280	0	1,540
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
TOTAL	2,457	2,557	2,234	59	7,307
PERCENT	34%	35%	31%	0.8%	100%
5 YEAR AVG.	491	511	447	12	1,461



**Development
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Report**



Issued Use and Occupancy Permits

Summary of Last Year

Last year from October 1, 2008 to September 30, 2009, the County issued 1,163 use and occupancy permits (Table 24). Of all planning areas, ElkrIDGE had the most with 389. This is followed by Ellicott City with 325, the Southeast with 213, and the Rural West and Columbia with 118 each. Countywide, 29% of the permits were for single family detached units, 38% were for single family attached units and 33% were for apartment units.

Table 24
Issued Use and Occupancy Permits by Unit Type, 10/01/08 to 9/30/09

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	25	92	1	0	118	10%
ElkrIDGE	69	124	196	0	389	33%
Ellicott City	73	145	107	0	325	28%
Rural West	110	8	0	0	118	10%
Southeast	61	72	80	0	213	18%
TOTAL	338	441	384	0	1,163	100%
PERCENT	29%	38%	33%	0%	100%	

Five Year Results

Over five years, from October 1, 2004 to September 30, 2009, a total of 7,515 use and occupancy permits have been issued in Howard County (Table 25). This is an average of about 1,503 permits per year.

Of the 7,515 total permits issued over five years, 34% were for single family detached units, 34% for single family attached units, and 32% for apartment units. Chart 11 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 338 last year.

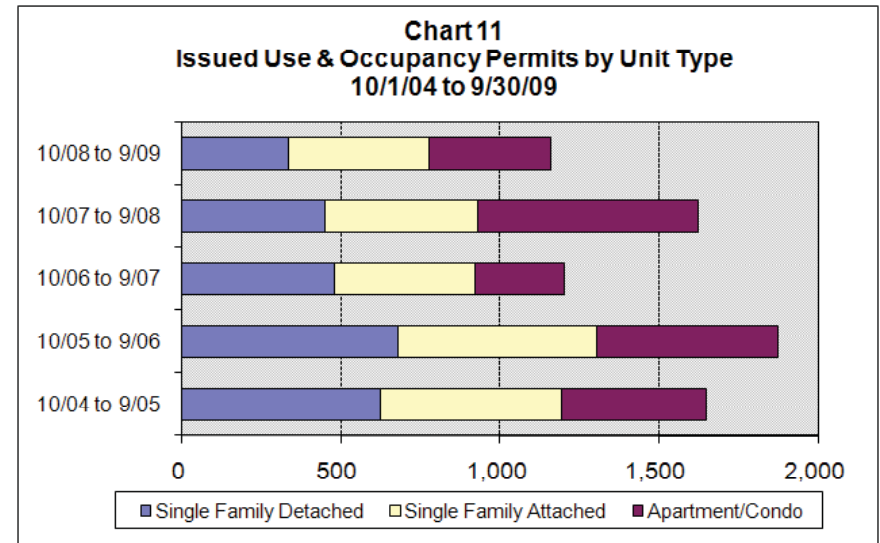


Table 25
Issued Use and Occupancy Permits by Unit Type, 10/01/04 to 9/30/09

Year	SFD	SFA	APT	MH	Total
10/04 to 9/05	625	570	455	0	1,650
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	480	691	0	1,623
10/08 to 9/09	338	441	384	0	1,163
TOTAL	2,579	2,555	2,377	4	7,515
PERCENT	34%	34%	32%	0%	100%
5 YEAR AVE.	516	511	475	1	1,503

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, 2008 to September 30, 2009.

In-Process Plans

Table 26 shows the age-restricted units from in-process plans by unit type and by planning area as of September 30, 2009. This includes both subdivision and site development plans. There were 1,187 units in process, most of which are in Ellicott City. The timing of actual development will be paced by APFO.

Countywide there were 692 apartments (including rental and condo), 248 SFA units and 247 SFD age-restricted units. Map 6 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, 1,336 units versus 1,187, respectively.

Table 26
Age Restricted Units from Plans in Process, 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	177	177	15%
Elkridge	0	36	0	36	3%
Ellicott City	247	190	398	835	70%
Rural West	0	0	0	0	0%
Southeast	0	22	117	139	12%
TOTAL	247	248	692	1,187	100%
PERCENT	21%	21%	58%	100%	
<hr/>					
As of 09/30/08	247	316	773	1,336	

Table 27 shows the total MIHU units in process. These total 637, the majority of which are in Elkridge. This is about the same number in process compared to the previous year which had 628.

Table 27
MIHU Units from Plans in Process, 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	15	39	54	8%
Elkridge	0	104	389	493	77%
Ellicott City	0	6	59	65	10%
Rural West	0	0	0	0	0%
Southeast	10	0	15	25	4%
TOTAL	10	125	502	637	100%
PERCENT	2%	20%	79%	100%	
<hr/>					
As of 09/30/08	10	140	478	628	

Table 28 shows just the age-restricted MIHU units in process, 87 of the 1,187 total. The remaining 550 units are not age-restricted MIHU units. There were 89 age-restricted MIHU units in process one year earlier.

Map 7 shows the particular projects that include MIHU units. Table 32 shows the details of each of these projects.

Table 28
Age-Res. MIHU Units from Plans in Process, 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	17	17	20%
Elkridge	0	5	0	5	6%
Ellicott City	0	6	44	50	57%
Rural West	0	0	0	0	0%
Southeast	0	0	15	15	17%
TOTAL	0	11	76	87	100%
PERCENT	0%	13%	87%	100%	

As of 09/30/08	0	18	71	89	
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Approved Site Development Plans

Table 29 shows the age-restricted units in site development plans that were approved between October 1, 2008 and September 30, 2009. There were a total of 189 units approved, a larger number than the 80 units approved the year before. The 189 units include 127 apartment units in the Southeast planing area, 52 townhouse units in Elkridge, and 10 townhouse units in Ellicott City. Map 6 show this approved age-restricted project during this time period. Table 33 shows the details for each of the plans (including MIHU's).

Table 30 shows the MIHU units in approved site development plans. A total of 36 units were approved, 13 in the Southeast and 23 in Elkridge. Nineteen of these units were age-restricted - shown in table 31. Map 7 shows the approved projects with MIHU units and Table 33 shows the plan details.

Table 29
Age Restricted Units from Approved Plans, 10/01/08 to 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	0	0	0%
Elkridge	0	52	0	52	28%
Ellicott City	0	10	0	10	5%
Rural West	0	0	0	0	0%
Southeast	0	0	127	127	67%
TOTAL	0	62	127	189	100%
PERCENT	0%	33%	67%	100%	

10/01/07 to 09/30/08	0	0	80	80	
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Table 30
MIHU Units from Approved Plans, 10/01/08 to 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	0	0	0%
Elkridge	0	23	0	23	64%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	13	13	36%
TOTAL	0	23	13	36	100%
PERCENT	0%	64%	36%	100%	

10/01/07 to 09/30/08	0	96	265	361	
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Table 31
Age-Res. MIHU Units from Approved Plans, 10/01/08 to 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	0	0	0	0	0%
Elkridge	0	6	0	6	32%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	13	13	68%
TOTAL	0	6	13	19	100%
PERCENT	0%	32%	68%	100%	

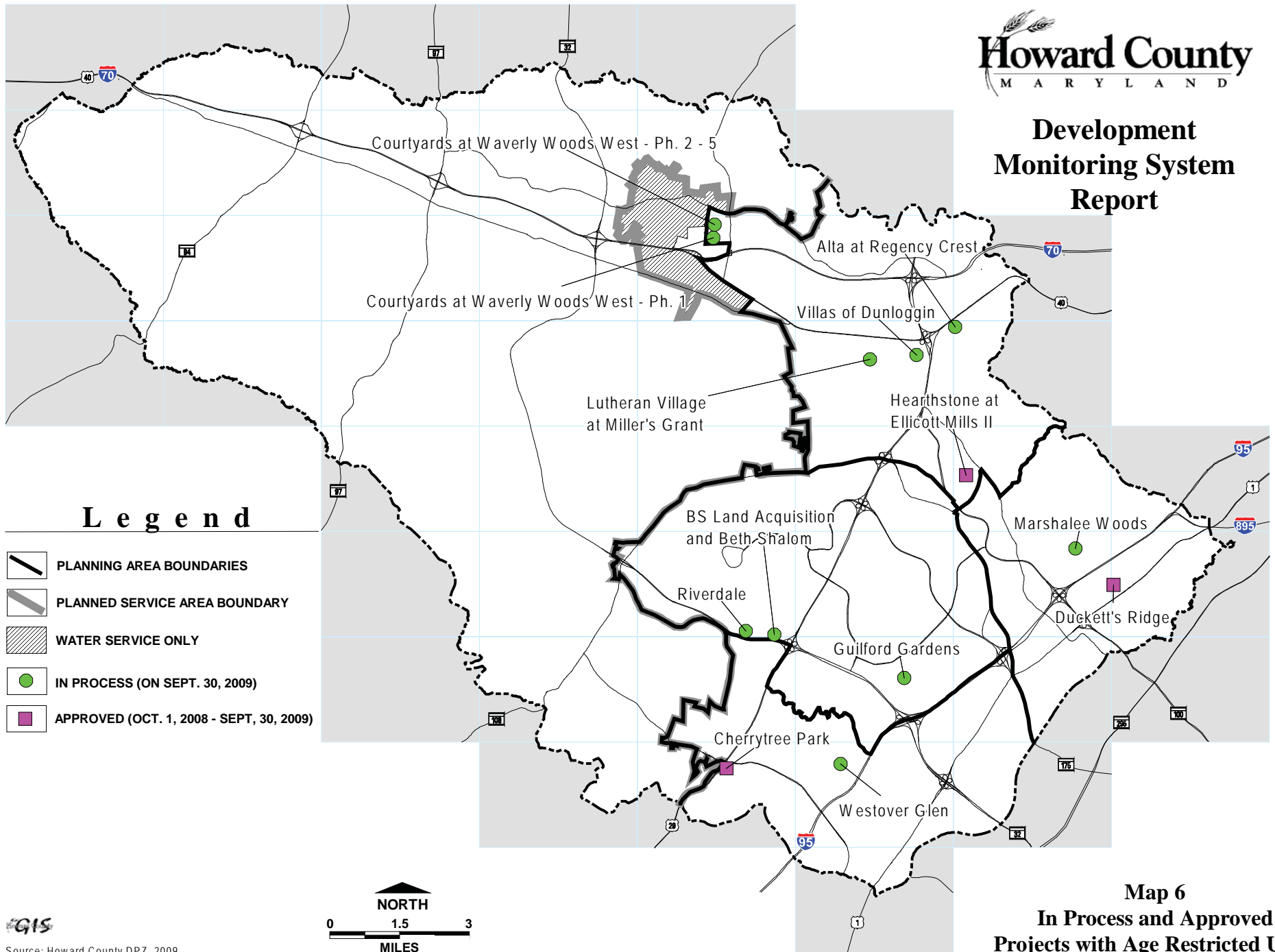
10/01/07 to 09/30/08	0	0	80	80	
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**Table 32
In Process Plans With MIHU and Age Restricted Units On September 30, 2009**






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
Alta at Regency Crest	SDP-08-068	POR	0	0	0	0	0	0	15	15	0	0	15	15	0	0	135	135
BS Land Acquisition and Beth Shalom	SDP-08-083	R-20	0	0	0	0	0	0	0	0	0	0	0	0	0	0	20	20
Courtyards at Waverly Woods West - Ph. 1	SDP-09-037	PSC	0	0	0	0	0	0	0	0	0	0	0	0	2	8	0	10
Courtyards at Waverly Woods West - Ph. 2	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	22	28	0	50
Courtyards at Waverly Woods West - Ph. 3 to 5	S-06-013	PSC	0	0	0	0	0	0	0	0	0	0	0	0	187	103	0	290
Fox Hunt Estates	SDP-07-007	R-SA-8	0	4	0	4	0	0	0	0	0	4	4	0	0	0	0	0
Guilford Gardens	SDP-09-045	R-A-15	0	0	22	22	0	0	5	5	0	0	27	27	0	0	40	40
Howard Square	F-08-013	CAC-CLI	0	0	200	200	0	0	0	0	0	0	200	200	0	0	0	0
Howard Square	SDP-08-078	CAC-CLI	0	41	0	41	0	0	0	0	0	41	41	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
Marshalee Woods	SDP-08-049	R-12, R-20	0	0	0	0	0	5	0	5	0	5	5	0	31	0	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
Riverwatch	SDP-08-109	CAC-CLI	0	0	12	12	0	0	0	0	0	0	12	12	0	0	0	0
Shiple's Grant - Phase 4	F-09-008	R-A-15	0	0	4	4	0	0	0	0	0	0	4	4	0	0	0	0
Shiple's Grant - Phase 5	P-09-002	R-A-15	0	8	0	8	0	0	0	0	0	8	8	0	0	0	0	0
Shiple's Grant - Phase 6	S-04-009	R-A-15	0	6	0	6	0	0	0	0	0	6	6	0	0	0	0	0
The Glens at Guilford	P-07-015	R-12	10	0	0	10	0	0	0	0	10	0	0	10	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
The Overlook at Bluestream	S-06-018	CAC-CLI	0	31	171	202	0	0	0	0	0	31	171	202	0	0	0	0
Village Towns	S-10-001	R-MH	0	6	0	6	0	0	0	0	0	6	6	0	0	0	0	0
Village Towns	S-04-001	R-MH	0	0	2	2	0	0	0	0	0	0	2	2	0	0	0	0
Village Towns Phase 3B - Area 1	SDP-10-001	R-MH	0	3	0	3	0	0	0	0	0	3	3	0	0	0	0	0
Villas of Dunloggin	SDP-07-054	R-SC	0	0	0	0	0	6	0	6	0	6	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	114	426	550	0	11	76	87	10	125	502	637	247	237	616	1,100



Development Monitoring System Report

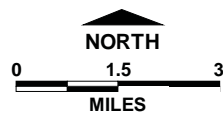


Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON SEPT. 30, 2009)
-  APPROVED (OCT. 1, 2008 - SEPT. 30, 2009)



Source: Howard County DPZ, 2009.



Map 6
In Process and Approved
Projects with Age Restricted Units

Table 33
Approved SDP's with MIHU and Age Restricted Units - October 1, 2008 to September 30, 2009

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
Cherrytree Park	SDP-08-057	POR-MXD-6	0	0	0	0	0	0	13	13	0	0	13	13	0	0	114	114
Duckett's Ridge	SDP-06-070	R-12	0	0	0	0	0	6	0	6	0	6	0	6	0	46	0	46
Hearthstone at Ellicott Mills II	SDP-09-004	R-20	0	0	0	0	0	0	0	0	0	0	0	0	10	0	10	
Howard Square	SDP-08-046	CAC-CLI	0	11	0	11	0	0	0	0	0	11	0	11	0	0	0	
Shipley's Grant - Phase 3	F-08-006	R-A-15	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	
TOTAL			0	17	0	17	0	6	13	19	0	23	13	36	0	56	114	170

Number of Plans

Tables 34 through 36 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, 2008 and September 30, 2009 there were 3 site plans approved with age-restricted units and 3 site plans approved with MIHU units. Three were age-restricted MIHU plans.

On September 30, 2009 there were 11 plans in process that included age-restricted units and 20 plans with MIHU units. Seven plans were age-restricted MIHU plans.

Table 34
Number of Plans with Age-Res. Units
10/01/08 to 09/30/09

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	3	0
Elkridge	1	1
Ellicott City	6	1
Rural West	0	0
Southeast	1	1
TOTAL	11	3

(1) In Process on Sept. 30, 2009

Table 35
Number of Plans with MIHU Units
10/01/08 to 09/30/09

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	2	0
Elkridge	12	2
Ellicott City	4	0
Rural West	0	0
Southeast	2	1
TOTAL	20	3

(1) In Process on Sept. 30, 2009

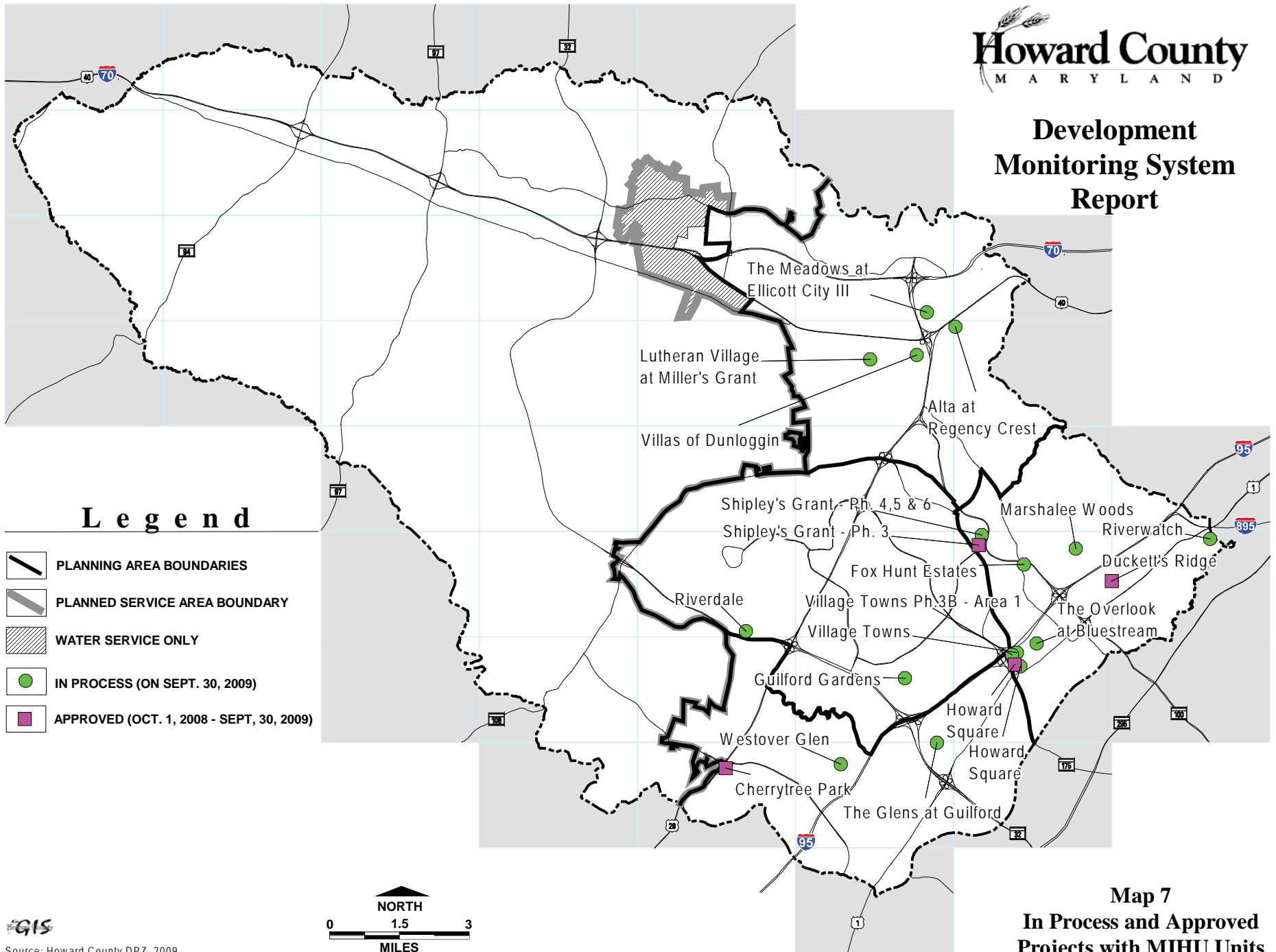
Table 36
Number of Plans with Age- Res. MIHU Units
10/01/08 to 09/30/09

Planning Area	Plans	
	In Process (1)	Approved Plans
Columbia	2	0
Elkridge	1	1
Ellicott City	3	0
Rural West	0	0
Southeast	1	1
TOTAL	7	2

(1) In Process on Sept. 30, 2009



Development Monitoring System Report



Legend

- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY
- IN PROCESS (ON SEPT. 30, 2009)
- APPROVED (OCT. 1, 2008 - SEPT. 30, 2009)

GIS Source: Howard County DPZ, 2009.



Map 7
In Process and Approved
Projects with MIHU Units

Use & Occupancy Permits

Table 37 below summarizes the use and occupancy permits issued by unit type for age-restricted units. Between October 1, 2008 and September 30, 2009 277 age-restricted units were built, 24% of the total 1,163 housing units built in the County last year. This percentage is an increase compared to the previous year when only 16% of the total 1,623 units built were age-restricted. Prior to that there were several years when as many as 1 in 3 homes built were age-restricted. Sixty-eight percent of those built last year were apartments (rental or condo) and 32% were townhouse units. There was only 1 single family detached age-restricted home built last year.

There were slightly more age-restricted units built last year compared to the previous year when there were 263 units built.

Table 37
Age Restricted Units Built, 10/01/08 to 09/30/09
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Columbia	1	29	0	30	11%
Elkridge	0	0	0	0	0%
Ellicott City	0	45	107	152	55%
Rural West	0	8	0	8	3%
Southeast	0	7	80	87	31%
TOTAL	1	89	187	277	100%
PERCENT	0%	32%	68%	100%	

10/01/07 to 09/30/08	7	110	146	263	
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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, 2008 to September 30, 2009, have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 38). The data is graphically represented in Charts 12, 13, and 14.

Average home prices declined 10.7% last year. For the year prior they had fallen 4.1%. They had fallen slightly less than 1% the year before that,

which was the first time prices have fallen for at least 15 years. It is clear that the downward trend has continued. Median prices for single family detached units fell by 11.8% last year. The median for SFA units fell by only 8.0% and condos fell by 13.5%.

In dollar terms, the median price for a single family detached house decreased by \$62,000, from \$525,000 in 07/08 to \$463,000 in 08/09. Single family attached units decreased by about \$27,000, from \$337,000 to \$310,000. The median price for condo units dropped by \$34,000, from \$252,000 to \$218,000.

Table 38
Housing Sales by Type, 10/01/04 to 9/30/09

10/04 to 9/05				10/05 to 9/06			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	1,052	\$245,472	\$232,270	Condo	886	\$279,802	\$276,815
MH	8	\$97,000	\$76,000	MH	5	\$106,200	\$121,000
SFA	2,589	\$327,308	\$310,000	SFA	2,340	\$371,880	\$349,348
SFD	3,278	\$544,994	\$505,128	SFD	2,863	\$612,088	\$575,000
TOTAL	6,927	\$417,627	\$365,000	TOTAL	6,094	\$471,126	\$400,000

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

10/08 to 9/09			
Unit Type	# of Sales	Mean	Median
Condo	391	\$222,730	\$218,000
MH	3	\$115,000	\$114,500
SFA	1,324	\$321,505	\$310,000
SFD	1,685	\$504,788	\$463,250
TOTAL	3,403	\$400,726	\$350,000

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

Total sales continue to drop. Total sales dropped from 3,864 units in 07/08 to only about 3,403 last year. This is 12% one year decline. Compared to four years ago, a peak sales year when over 6,900 homes were sold, it was a 50% decline, clearly indicating a slowing market.

This decrease in both home sales and prices is not unusual, nor unexpected, given it follows a significant run up beginning at the start of the decade.

Chart 12
Mean Sales Price by Unit Type

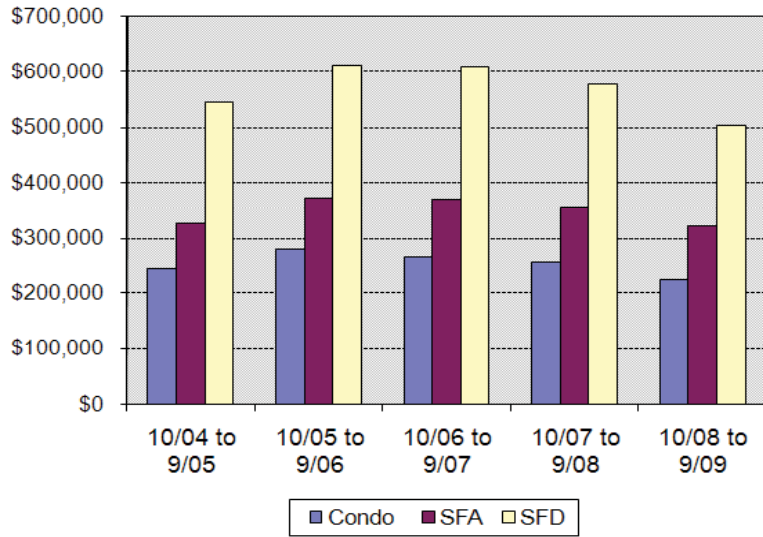


Chart 13
Median Sales Price by Unit Type

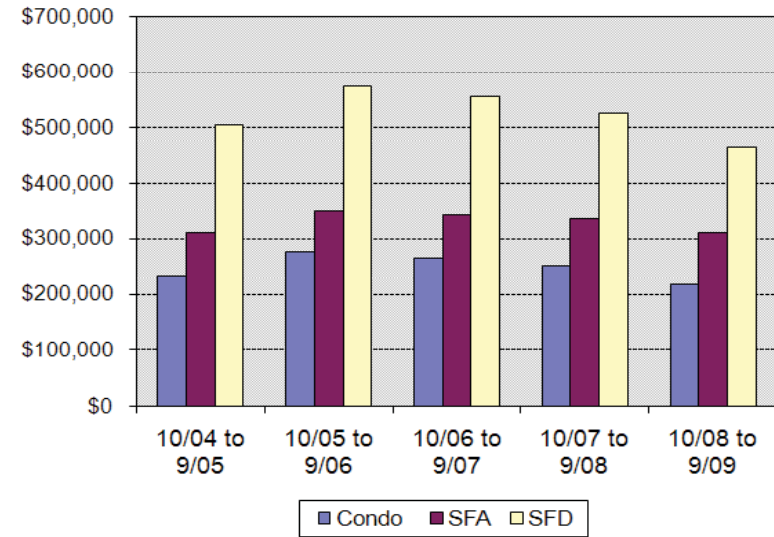
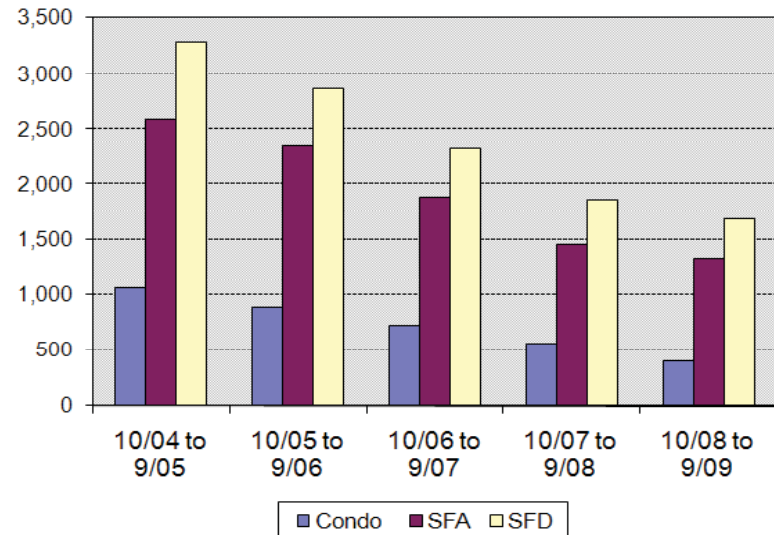
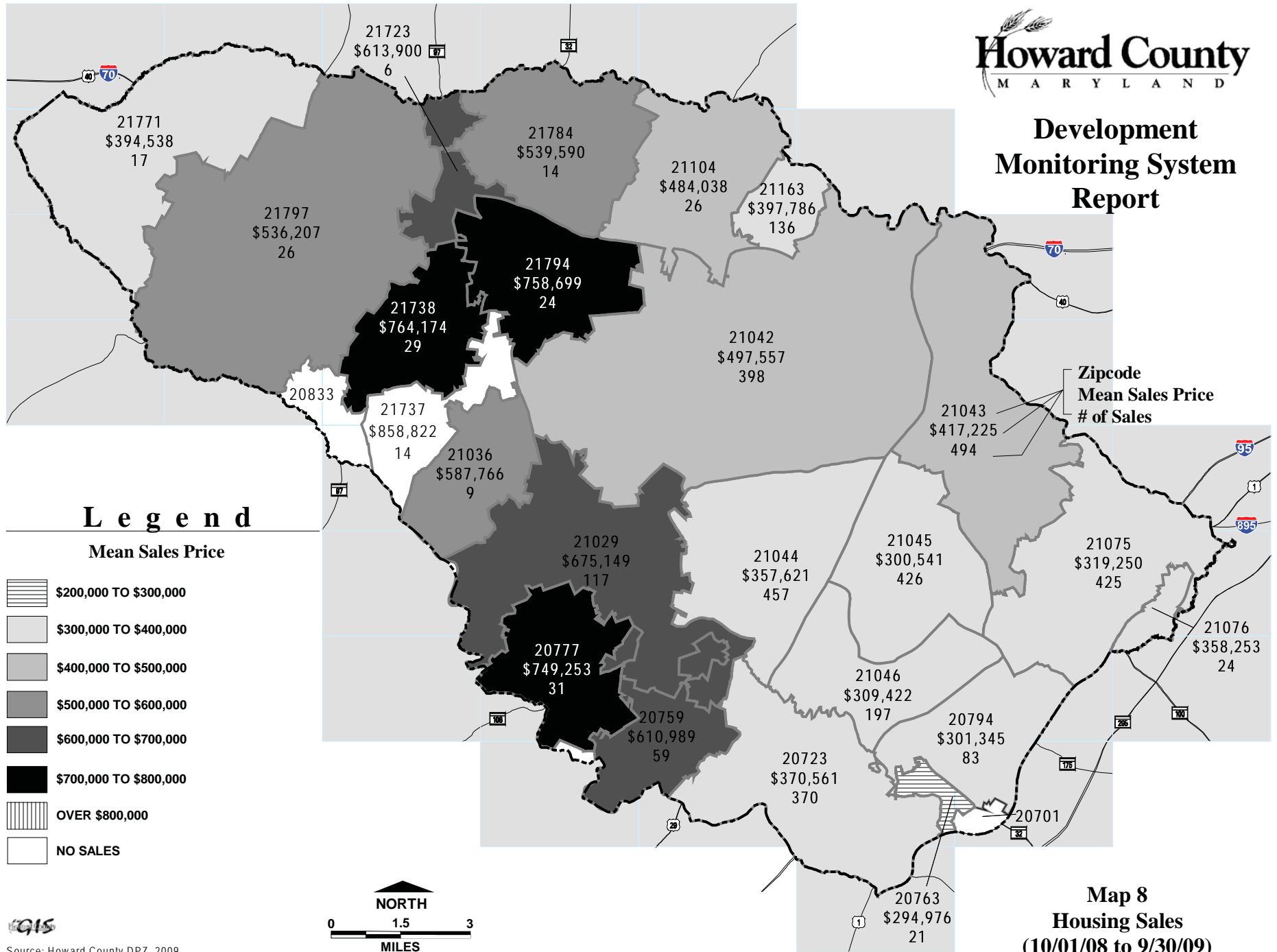


Chart 14
Number of Sales by Unit Type





Development Monitoring System Report



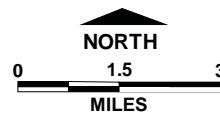
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Mean Sales Price

- \$200,000 TO \$300,000
- \$300,000 TO \$400,000
- \$400,000 TO \$500,000
- \$500,000 TO \$600,000
- \$600,000 TO \$700,000
- \$700,000 TO \$800,000
- OVER \$800,000
- NO SALES



Source: Howard County DPZ, 2009.



Map 8
Housing Sales
(10/01/08 to 9/30/09)

Rural 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. As an additional enhancement, new payment options were approved, including cash and a shorter term IPA. A new application period, known as "Batch 13," occurred during the fall of 2006. This batch brought in three applicants with high quality properties. ALPP subsequently acquired easements on these properties between 2007 and 2009 totaling 253 acres. The last of these three, the 36 acre de Fries farm, was settled and added to the program during this current reporting period in June 2009.

Building on the recent success, in the spring of 2009 the County Executive announced the opening of "Batch 14", which ran from June 1 through July 31, and attracted 13 applicants. All but two of the applicant 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. By the end of this current DMS reporting period, September 30, 2009, the Agricultural Land Preservation Board had begun their review of the applicants, a process that has continued through the fall. Offers have been made on the top scoring 7 properties totaling 1,036 acres in early December 2009.

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, 1 property totaling 36 acres was preserved with an agricultural easement through the development process.

As of September 30, 2009, there were 20,347 acres of permanently preserved agricultural land. This includes 13,494 acres of purchased easements through the County's Program, 3,950 acres of easements purchased by the State and 2,903 preservation acres dedicated as part of the development process (Table 39).

Table 39
Agricultural Preservation Easements, September 30, 2009

Type	Acres	Percent
County Purchased Agric. Easements	13,494	66%
State Purchased Agric. Easements	3,950	19%
Dedicated Agric. Preservation Parcels	2,903	14%
TOTAL	20,347	100%

Other Rural Easement Dedication

As previously indicated, last year 36 acres were created through the development process and were enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 2,903 acres.

Besides agricultural easements, parcels are also preserved through the development process as environmental preservation parcels. Last year, 180 acres of land in 19 parcels were dedicated as joint Howard County/Homeowner's Association preservation parcels, and another 92 acres in 2 parcels were dedicated as joint Howard County Conservancy/Howard County preservation parcels. Table 40 shows the land preservation totals from dedicated easements to date for all easement types.

Since 1992, preservation easements on 10,260 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 5,759 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 2,903 acres are held by the Howard County Agricultural Land Preservation Program. A total of 1,042 acres are jointly held by the Howard County Conservancy and Howard County. 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 40 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 14,222 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 3,962 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 10,260 acres, is land in dedicated preservation easements and open space as described earlier. Of the 3,962 acres for residential development, about 908 acres are not yet developed (built on), 2,663 acres are developed (built on) and 391 acres are for roads.

Preservation easements in the Rural West discussed above total 27,704 acres. This includes all 20,347 acres of agricultural preservation easements and 7,357 acres of environmental preservation parcels dedicated through the subdivision process. This represents about 29% of the approximate 94,660 total acres of land in the Rural West.

Table 40
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	491	565	
Undeveloped Lots (From Density Transfer)	323	343	
Total Undeveloped Lots	814	908	
Developed Lots (By Right)	1,627	1,848	
Developed Lots (From Density Transfer)	769	815	
Total Developed Lots	2,396	2,663	
Roadway		391	
TOTAL	3,210	3,962	27.9%
<hr/>			
Preservation	Lots	Acres	
Agricultural Preservation	84	2,903	
Howard County/Homeowner's Association	510	5,759	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	29	1,042	
Other	100	426	
Total Preservation	728	10,260	72.1%
<hr/>			
GRAND TOTAL (Includes Res. Develop.)	3,938	14,222	100.0%

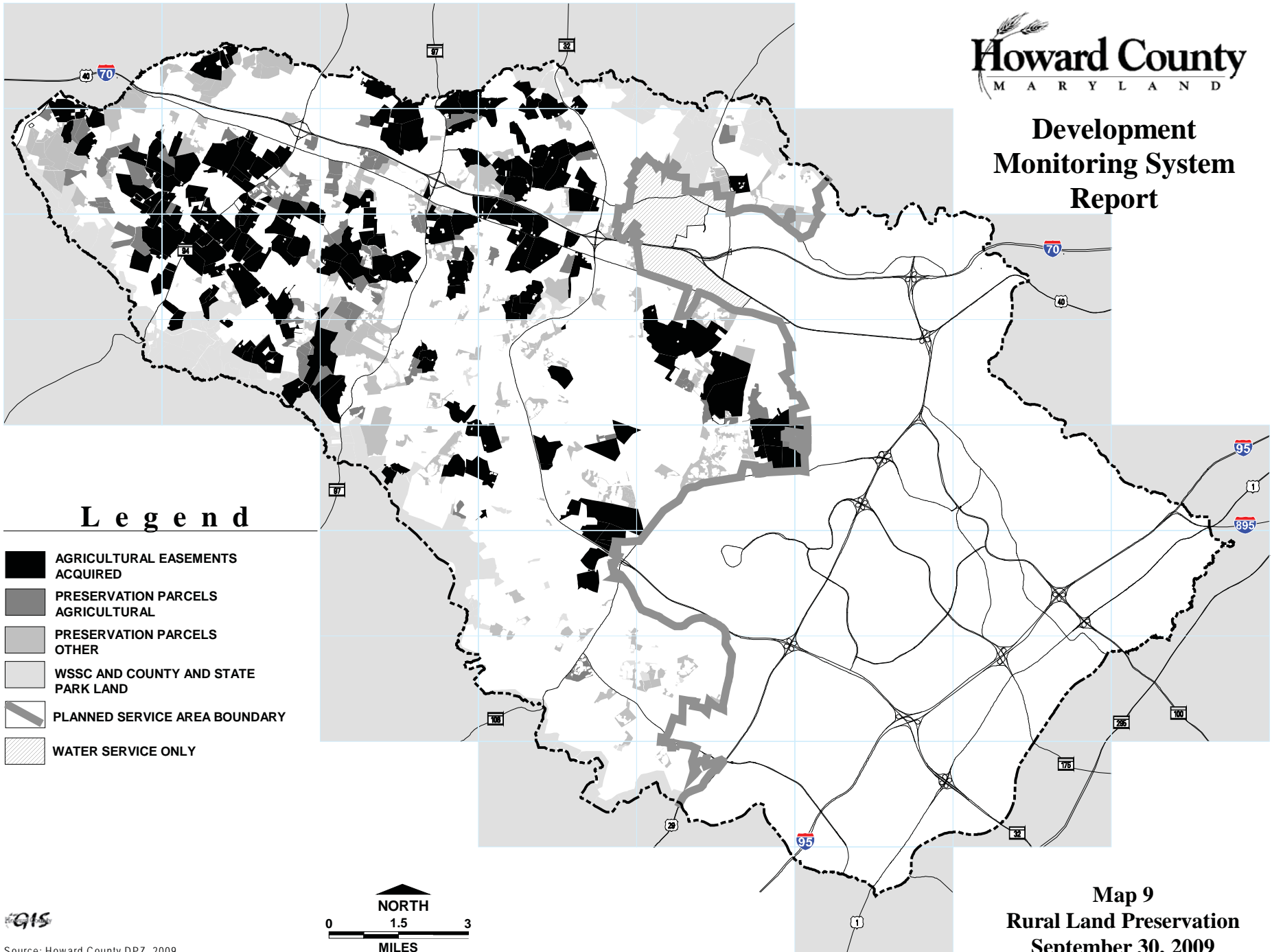
Total Preserved Land in the Rural West

Including County and State parks (7,989), WSSC land (2,466 acres), permanent historic easements (102 acres) and other environmental easements (1,062 acres) the total preserved land amounts to 39,323 acres, about 42% of all land in the Rural West.

Map 15 shows the preserved land as of September 30, 2009 including acquired (purchased) agricultural easements, dedicated agricultural and environmental preserved parcels, other environmental easements, as well as WSSC, County and State park land.



Development Monitoring System Report



Source: Howard County DPZ, 2009.

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

Last year there were 3 non-residential lots recorded countywide in 18 subdivision plans totaling 371 acres (Table 41). 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 41
Recorded Non-Residential Subdivisions, 10/01/08 to 9/30/09

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	1	33%	5	28%	56	15%
Elkridge	(2)	-67%	6	33%	101	27%
Ellicott City	0	0%	1	6%	2	0%
Rural West	0	0%	1	6%	115	31.0%
Southeast	4	133%	5	28%	98	26%
TOTAL	3	100%	18	100%	371	100%

Table 42 shows the recorded non-residential subdivisions for the last five years from October 1, 2004 to September 30, 2009. Over this five year period there were 60 non-residential lots recorded countywide in 181 subdivision plans totaling 4,788 acres. The five year average amounts to 12 lots in 36 plans encompassing 958 acres.

Table 42
Recorded Non-Residential Subdivisions, 10/01/04 to 9/30/09

Countywide	Lots	Plans	Acreage
10/04 to 09/05	11	43	1,469
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
5 YEAR TOTAL	60	181	4,788
5 YEAR AVG.	12	36	958

In-Process Plans

Countywide, there were 18 non-residential subdivision plans in process as of September 30, 2009. This compares to 19 plans in process one year earlier (Table 43). Six plans were in the Southeast, 6 plans in Elkrigde, 3 in Columbia, 2 in Ellicott City and 1 in the Rural West. Most of the plans were in the final plan stage.

Table 44 shows the number of potential non-residential lots in process. As of September 30, 2009, there were 7 lots in process, compared to 6 in process on September 30, 2008. These include resubdivisions for the purpose of adding roadway or easements.

There were a total of 472 non-residential acres in the subdivision process as of September 30, 2009 (Table 45). This compares to 309 acres in process one year earlier. For the current year the greatest acreage amount is in the Southeast (143 acres). This is followed by Elkrigde with 142 acres, Columbia with 135 acres, the Rural West with 31 acres and Ellicott City with 21 acres.

Table 43
Number of Non-Residential Plans in Process, 09/30/09
with Comparisons to 09/30/08 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Columbia	0	0	0	3	3
Elkrigde	1	0	0	5	6
Ellicott City	0	0	0	2	2
Rural West	0	1	0	0	1
Southeast	0	1	1	4	6
TOTAL	1	2	1	14	18
09/30/08 Total	0	2	3	14	19

Table 44
Non-Residential Lots from Subdivision Plans in Process, 09/30/09
with Comparisons to 09/30/08 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Columbia	0	0	0	0	0
Elkrigde	3	0	0	0	3
Ellicott City	0	0	0	2	2
Rural West	0	0	0	0	0
Southeast	0	1	0	1	2
TOTAL	3	1	0	3	7
09/30/08 Total	0	2	3	1	6

Table 45
Acreage of Non-Residential Subdivision Plans in Process, 09/30/09
with Comparisons to 09/30/08 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Columbia	0	0	0	135	135
Elkrigde	73	0	0	69	142
Ellicott City	0	0	0	21	21
Rural West	0	31	0	0	31
Southeast	0	35	45	63	143
TOTAL	73	66	45	289	472
09/30/08 Total	0	33	72	204	309

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 last five years.

Summary of Last Year

Last year about 1 million square feet were approved in 34 site development plans on 260 acres (Table 46). The greatest amount of square footage approved by far was in the Southeast, followed by Elkridge and then Columbia.

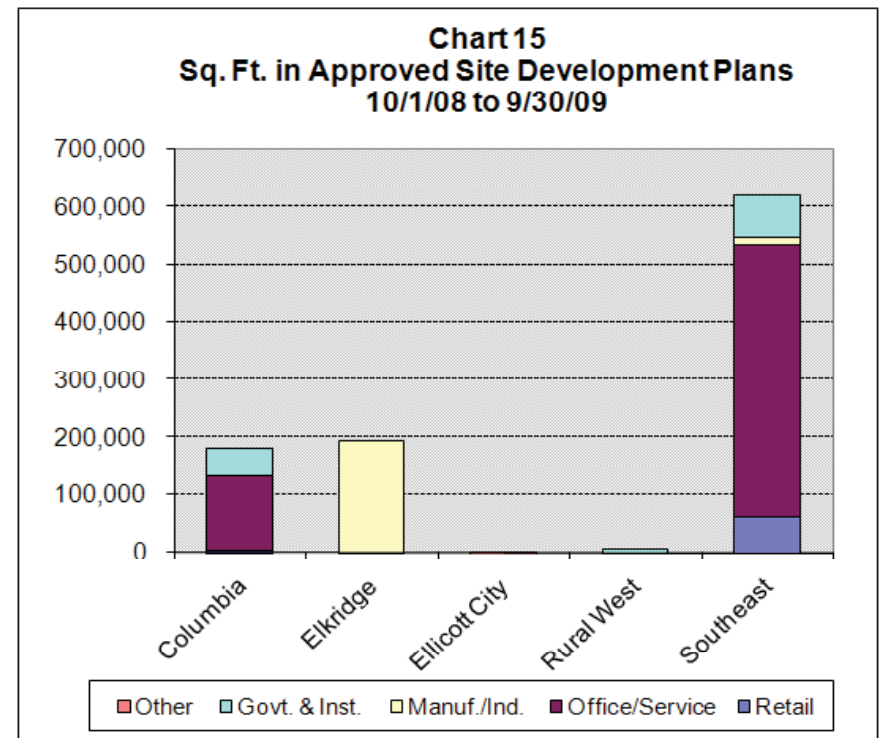
Table 47 shows the approved square footage by building type. About 600,000 square feet, almost 60% of the total, are for office/service uses. About 205,000 square feet, 20%, are for manufacturing/extensive industrial uses, most all of which is in Elkridge. This is followed by government & institutional and then retail uses. Chart 15 shows this breakdown graphically.

Table 47
Building Square Feet in Approved Site Development Plans
10/01/08 to 9/30/09

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	3,886	127,038	0	50,409	0	181,333
Elkridge	0	1,936	193,296	0	0	195,232
Ellicott City	0	0	0	0	720	720
Rural West	1,970	0	0	5,000	0	6,970
Southeast	62,016	472,229	12,000	75,007	0	621,252
TOTAL	67,872	601,203	205,296	130,416	720	1,005,507
PERCENT	6.8%	59.8%	20.4%	13.0%	0.1%	100.0%

Table 46
Approved Non-Residential Site Development Plans, 10/01/08 to 9/30/09

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	181,333	18%	9	26%	84	32%
Elkridge	195,232	19%	4	12%	20	8%
Ellicott City	720	0%	5	15%	11	4%
Rural West	6,970	1%	2	6%	4	1%
Southeast	621,252	62%	14	41%	141	54%
TOTAL	1,005,507	100%	34	100%	260	100%



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

Of the 1 million square feet of non-residential building space approved in site development plans last year, about 841,000 square feet, 84% of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 48. The location of these plans are shown on Map 10.

In Columbia, 1 large plans with more 50,000 square feet of building space was approved last year - an office building in River's Corporate Park.

In Elkridge, there were 2 large plans approved. The largest was the 128,000 square foot self storage facility. There was also a 60,000 square foot warehouse approved in the Brookdale Industrial Park.

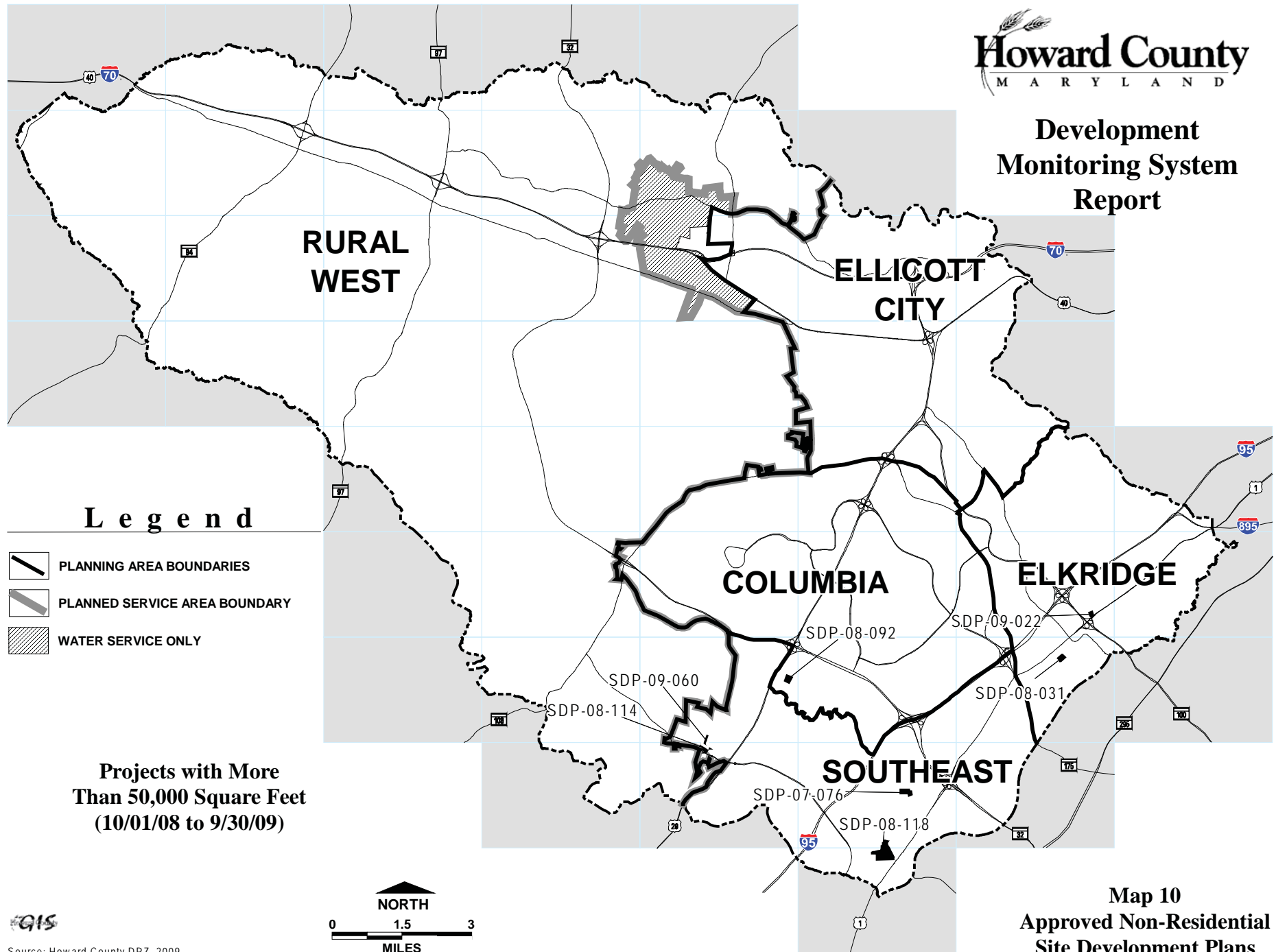
In the Southeast, 4 large buildings were approved. The largest was an office building in Maple Lawn Farms, the largest of all buildings approved Countywide last year. A new 170,000 square foot hotel/restaurant was approved in the Savage Mill area. A second 96,000 square foot office/retail building was approved in Maple Lawn Farms. A new 62,500 square foot community center in the North Laurel Park was also approved

Table 48
Projects With More Than 50,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/08 to 9/30/09

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-08-092	Rivers Corporate Park	Office	69,136	69,136
Elkridge	SDP-09-022	EZ Storage Facility	Self Storage Facility	128,122	188,122
	SDP-08-031	Brookdale Industrial Park	Warehouse	60,000	
Southeast	SDP-09-060	Maple Lawn Farms	Office	254,918	584,059
	SDP-07-076	Savage Mill Hotels	Hotel/Restaurant	170,028	
	SDP-08-114	Maple Lawn Farms	Office/Retail	96,593	
	SDP-08-118	North Laurel Park	Community Center	62,520	
TOTAL					841,317



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Source: Howard County DPZ, 2009.

Five Year Results

Table 49 shows the Countywide approved non-residential site development plans for the last five years from October 1, 2004 to September 30, 2009. Over this five year period there were 252 plans approved on 2,860 acres including 11.3 million square feet of building space. This equates to a five year average of about 2.3 million square feet of new building space per year.

Last year, with about 1 million square feet of approved space, was the smallest of all five years. Around 3 to 3.9 million square feet were approved annually during the late 1990s into 2000/01. This was followed by a significant slowdown during the mild recession where only about half that amount was approved from 2001 through 2004. This was then followed by the substantial increase 3 years ago and then a more moderate 2.5 and 2.4 million square feet the subsequent two years. Last year and the previous year reflects a significant drop from those levels and reflects the slowing economy once again.

Table 50 shows the five year history by building type. Over the five years, about 48% of the total 11.3 million square feet was for office/service space. About 31% was for manufacturing/extensive industrial space, 12% for retail uses, 8% for government and institutional uses, and 1% for other uses. Chart 16 shows this graphically.

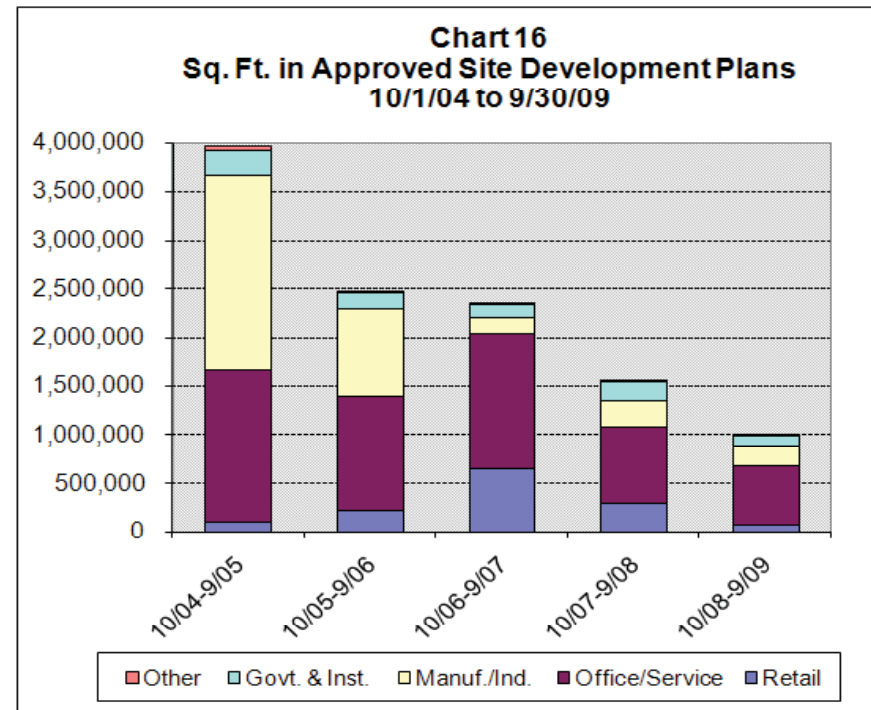


Table 49
Approved Non-Residential Site Development Plans
10/01/04 to 9/30/09

Year	Square Feet	Number or Plans	Acreage
10/04-9/05	3,961,683	58	1,332
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
TOTAL	11,344,191	252	2,860
5 YR AVE.	2,268,838	50	572

Table 50
Building Square Feet in Approved Site Development Plans
10/01/04 to 9/30/09

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/04-9/05	96,349	1,549,016	2,018,475	254,357	43,486	3,961,683
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
TOTAL	1,318,671	5,490,741	3,561,285	904,798	68,696	11,344,191
PERCENT	11.6%	48.4%	31.4%	8.0%	0.6%	100.0%

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of September 30, 2009 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 52 non-residential site development plans in process as of September 30, 2009. These plans include about 1.7 million square feet of building space covering 456 acres. This compares to about 1.5 million square feet in 57 plans on 415 acres that were in process the previous year (on September 30, 2008).

As shown in Table 51, Elkridge had the most square footage in process, followed by the Southeast. Table 52 shows a more detailed breakdown of square footage by building type. About 875,000 square feet are for office/service buildings and 615,000 for manufacturing/extensive industrial uses. Retail space accounts for 87,000 square feet and there is 125,000 square feet of government and institutional space in process.

Major Projects

Table 53 shows site development plans with buildings greater than 50,000 square feet. Map 11 shows the locations of these projects. These projects account for about 72% of the total 1.5 million square feet of building space in process.

Table 51
In-Process Non-Residential Site Development Plans, 9/30/09
with Comparisons to Countywide In-Process on 09/30/08

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	297,545	17%	10	19%	100	22%
Elkridge	566,422	33%	13	25%	150	33%
Ellicott City	195,132	11%	13	25%	44	10%
Rural West	207,306	12%	4	8%	97	21%
Southeast	452,191	26%	12	23%	66	15%
TOTAL	1,718,596	100%	52	100%	456	100%
9/30/2008	1,530,412		57		415	

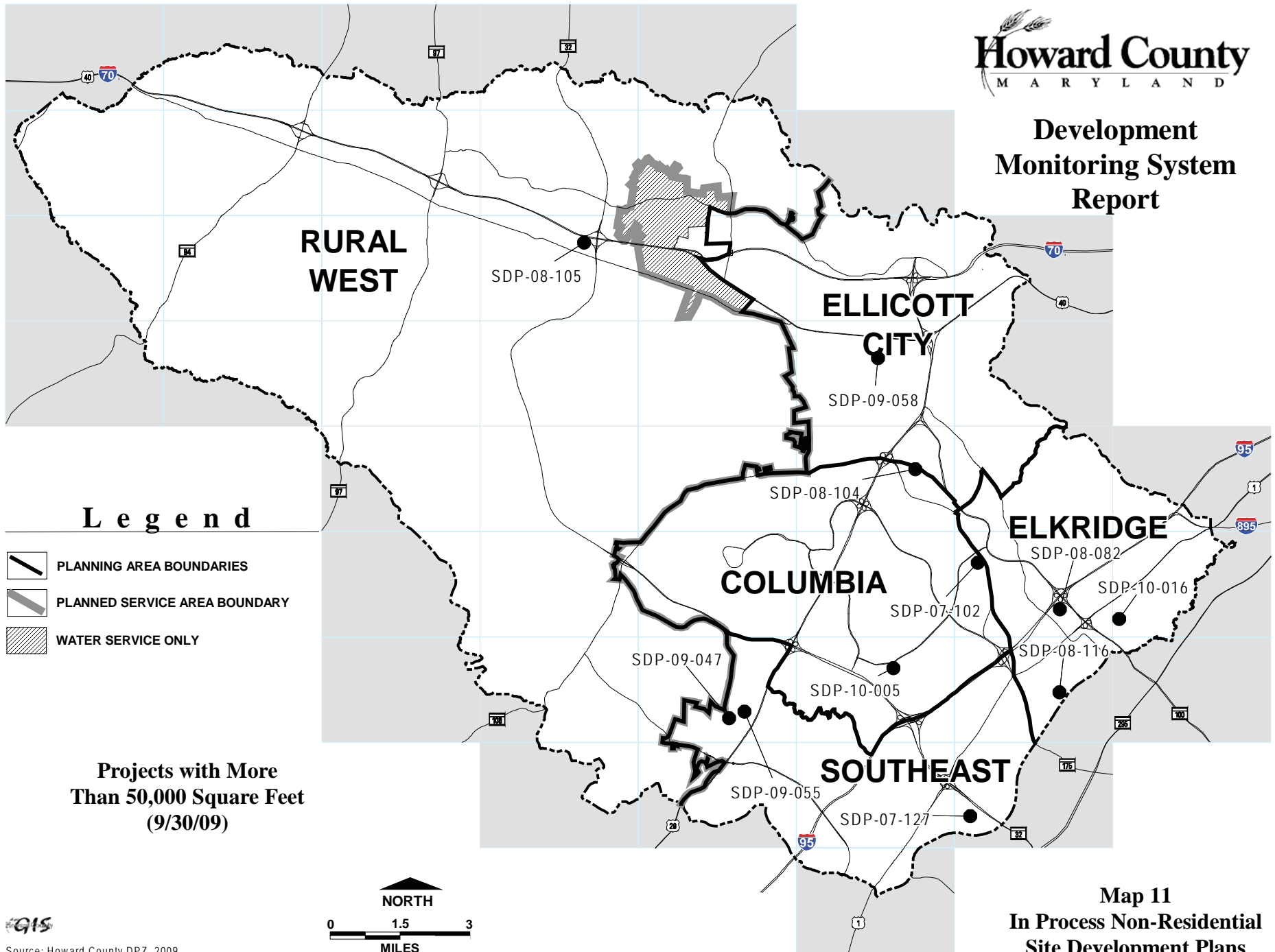
Table 52
Building Square Feet in In-Process Site Development Plans, 9/30/09
with Comparisons to Countywide In-Process on 09/30/08

Region	Office/Service		Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
	Retail	Service	Ext. Ind.	& Inst.	Other	
Columbia	14,820	78,309	172,700	31,716	0	297,545
Elkridge	2,850	202,039	361,533	0	0	566,422
Ellicott City	38,476	51,900	0	92,990	11,766	195,132
Rural West	3,580	203,726	0	0	0	207,306
Southeast	26,797	339,446	80,855	0	5,093	452,191
TOTAL	86,523	875,420	615,088	124,706	16,859	1,718,596
PERCENT	5.0%	50.9%	35.8%	7.3%	1.0%	100.0%
9/30/2008	139,309	677,788	544,139	155,640	13,536	1,530,412

Table 53
Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 9/30/09

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	6685 Santa Barbara Court	Warehouse	166,789	437,589
	SDP-08-116	Dorsey Run Industrial Center	Warehouse	162,800	
	SDP-08-082	Corridor 95 Business Park	Office	108,000	
Ellicott City	SDP-09-058	Miller Library and Historical Center	Library	66,350	66,350
Rural West	SDP-08-105	Friendship at 70 (Wah Property)	Office/Flex	201,224	201,224
Southeast	SDP-09-047	JHU - APL Building 200	Office	200,000	368,614
	SDP-09-055	Homewood Suites	Hotel/Restaurant	96,614	
	SDP-07-127	Corridor Road LLC	Office/Warehouse	72,000	
TOTAL					1,321,117

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Non-Residential Building Permits

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

Summary of Last Year

Last year, from October 1, 2008 to September 30, 2009, 86 permits were issued for about 1.1 million square feet in non-residential building space (Table 54). The greatest amount of square footage was in the Southeast, followed by Ellicott City and then Elkridge.

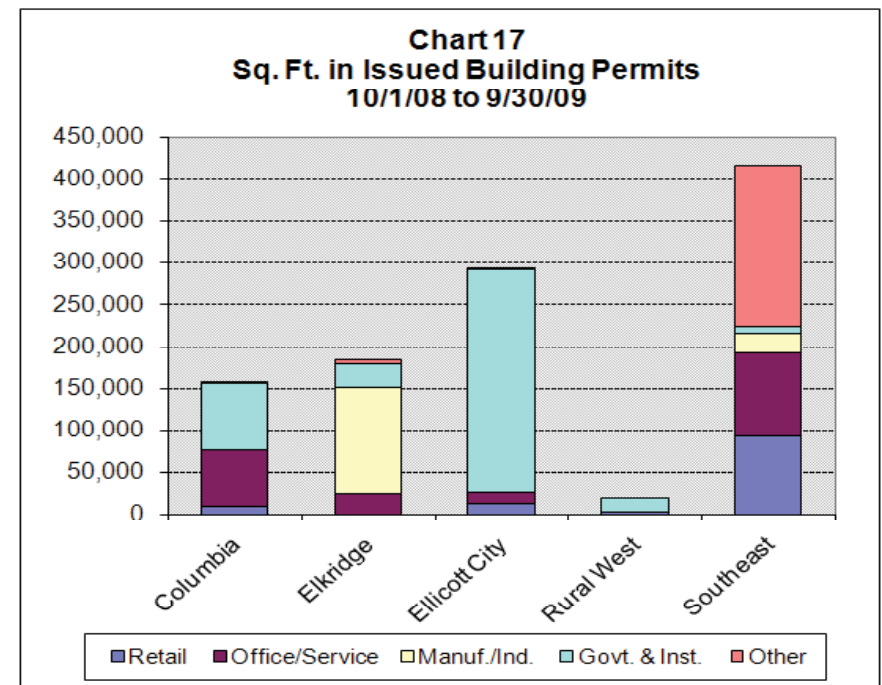
Table 54
Issued Non-Residential Building Permits, 10/01/08 to 9/30/09

Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Columbia	156,285	15%	21	24%
Elkridge	182,720	17%	14	16%
Ellicott City	293,777	28%	21	24%
Rural West	19,417	2%	6	7%
Southeast	415,951	39%	24	28%
TOTAL	1,068,150	100%	86	100%

Table 55 shows the approved square footage by building type. About 400,000 square feet, 37% of the total, are for government & institutional uses. About 200,000 square feet, 19%, are for office/service space. This is followed by other, manufacturing/extensive industrial and retail uses. The large amount in the Other category in the Southeast is a new parking garage as part of Mission Place. Chart 17 shows this breakdown graphically.

Table 55
Building Square Feet in Issued Building Permits
10/01/08 to 9/30/09

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	9,360	67,022	0	79,703	200	156,285
Elkridge	0	24,208	126,186	27,358	4,968	182,720
Ellicott City	11,900	14,151	0	266,122	1,604	293,777
Rural West	2,917	0	0	16,500	0	19,417
Southeast	91,422	100,345	22,509	9,657	192,018	415,951
TOTAL	115,599	205,726	148,695	399,340	198,790	1,068,150
PERCENT	10.8%	19.3%	13.9%	37.4%	18.6%	100.0%



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

Of the 1.1 million square feet of non-residential building space in issued permits last year, about 524,000 square feet, 50% of the total, were in plans with more than 50,000 square feet. These larger buildings are shown in Table 56. The location of these buildings are shown on Map 12.

In Columbia, 1 large building greater than 50,000 square began construction – an office building in Columbia Gateway. There was also one larger building that began construction in ElkrIDGE - an EZ Storage facility.

A building permit was issued for a new 103,000 square foot nursing home in Ellicott City

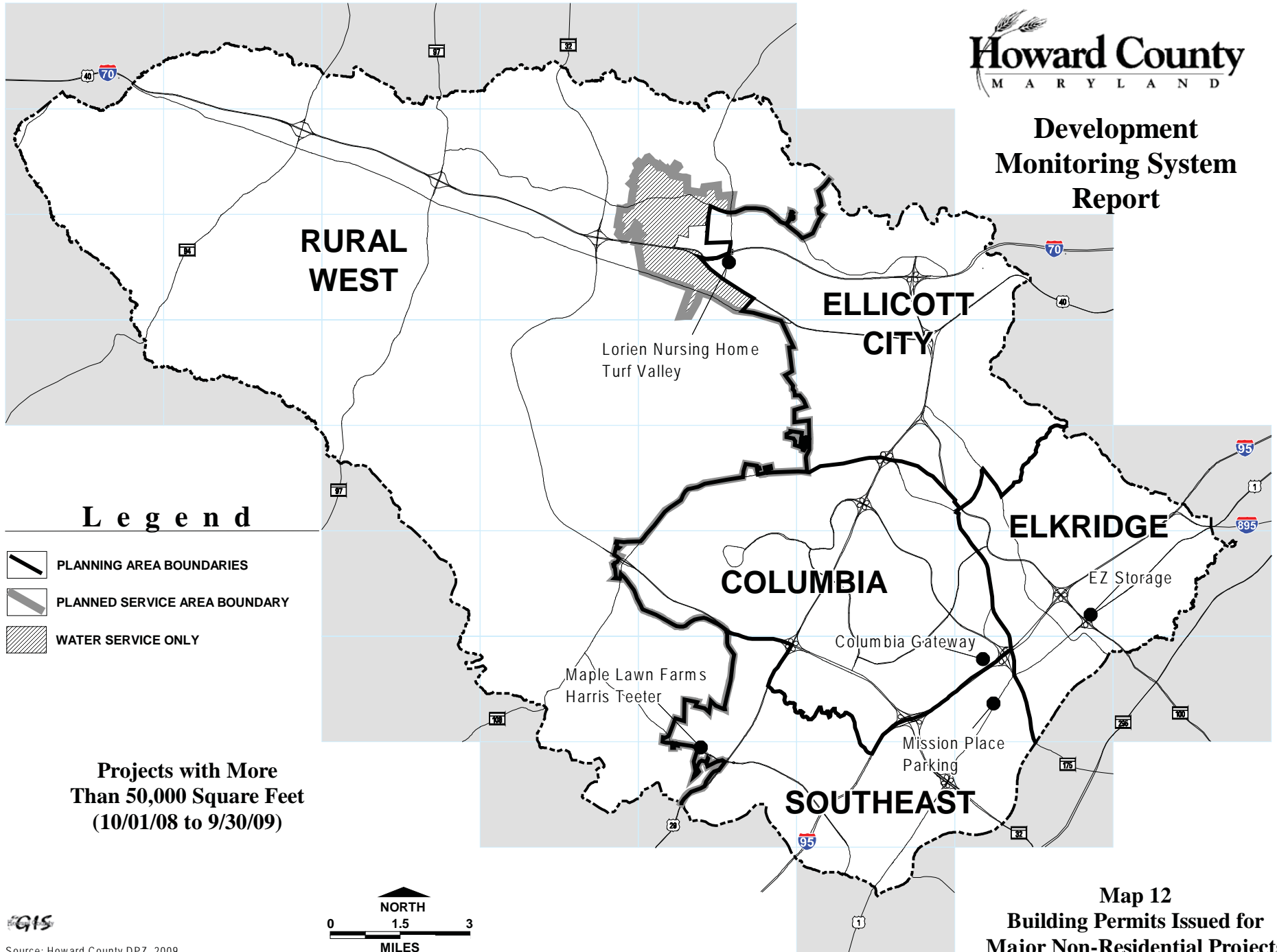
In the Southeast, there were 2 larger facilities: a 186,000 square foot parking garage for the Mission Place development and a 54,000 square foot Harris Teeter grocery store in Maple Lawn Farms.

Table 56
Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/08 to 9/30/09

Region	Subdivision/Name	Proposed Use	Square Feet	TOTAL
Columbia	Columbia Gateway	Office	55,332	55,332
ElkrIDGE	EZ Storage	Storage Building/Warehouse	126,186	126,186
Ellicott City	Lorien Nursing Home - Turf Valley	Nursing Home & Assisted Living	103,102	103,102
Southeast	Mission Place Parking	Parking Garage	185,504	239,190
	Maple Lawn Farms Harris Teeter	Grocery Store	53,686	
TOTAL				523,810



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Source: Howard County DPZ, 2009.

Five Year Results

Table 57 shows issued non-residential building permits Countywide for the last five years from October 1, 2004 to September 30, 2009. Over this five year period there were 524 permits issued for about 11.5 million square feet of building space. This equates to a five year average of about 2.3 million square feet per year.

Last year, with about 1.1 million square in issued permits, was the smallest of all five years. In the year prior to that, there were about 1.5 million square feet in issued permits, and previous to that about 2.2 million square feet. Around 3 to 3.5 million square feet were approved during the late 1990s into 2000/01. This was followed by a slowdown during the mild recession that occurred then where only about half that amount was approved from 2001 through 2004. This was then followed by the substantial increase between '04 and '06 with more than 3 million square feet approved each year. The slowdown from the peak in 04/05 to the last reporting period is clearly apparent.

Table 58 shows the five year history by building type. Over the five years, 43% of the total 11.5 million square feet was for office/service space. About 26% was for manufacturing/extensive industrial space, 17% for government and institutional uses, about 10% for retail and 4% for other uses. Chart 18 shows this graphically.

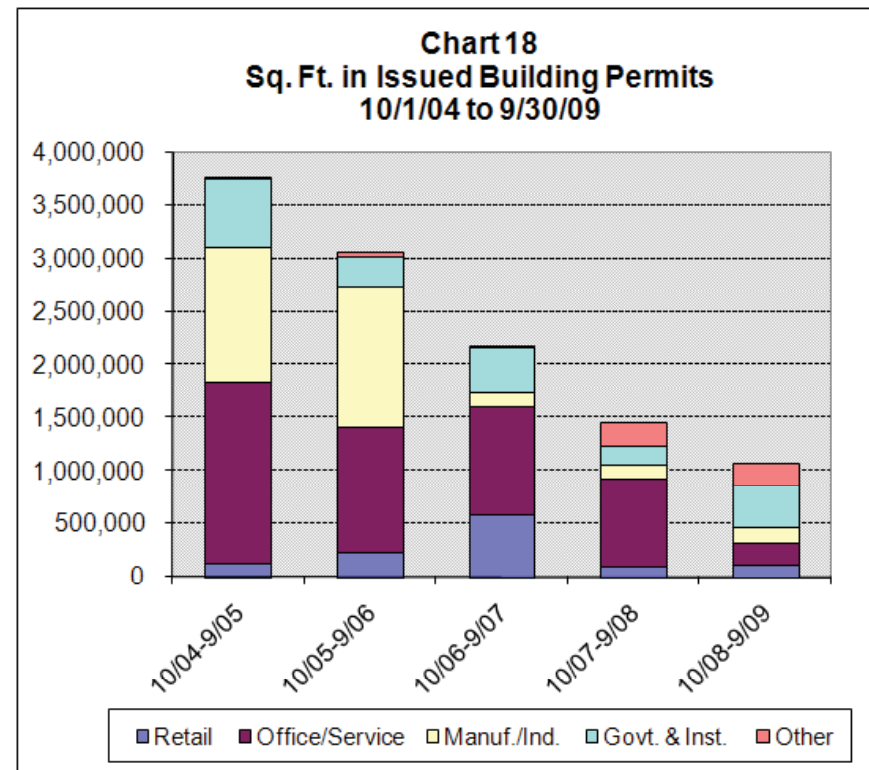


Table 57
Issued Non-Residential Building Permits
10/01/04 to 9/30/09

Year	Square Feet	Number of Permits
10/04-9/05	3,777,092	113
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
TOTAL	11,544,974	524
5 YR AVE.	2,308,995	105

Table 58
Building Square Feet in Issued Building Permits
10/01/04 to 9/30/09

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/04-9/05	126,560	1,717,385	1,260,566	649,769	22,812	3,777,092
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
TOTAL	1,148,174	4,945,411	3,006,733	1,934,184	510,472	11,544,974
PERCENT	9.9%	42.8%	26.0%	16.8%	4.4%	100.0%

Employment Estimates

New job potential has been estimated based on the standard square feet per employee factors shown in Table 59. These factors are multiplied times the square footage of planned building space which is included on site development plans and building permits.

Table 59
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, 2008 to September 30, 2009 could accommodate an estimated 3,041 employees (Table 60). About 20% of the potential jobs are located in Columbia, where they are mostly office/service jobs. About 73% of the potential jobs are in the Southeast, also mostly office/service jobs. About 7% of the jobs are in Elkridge.

Countywide, 2,405 potential jobs, or about 79% of the total are office/service jobs. This is followed by 9% government & institutional jobs, 7% manufacturing/extensive industrial, and 6% retail jobs.

Table 60
Potential Employment from Approved Non-Residential SDP's
By Use Category, 10/01/08 to 9/30/09

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Columbia	10	508	0	101	619	20%
Elkridge	0	8	193	0	201	7%
Ellicott City	0	0	0	0	0	0%
Rural West	5	0	0	10	15	0%
Southeast	155	1,889	12	150	2,206	73%
TOTAL	170	2,405	205	261	3,041	100%
PERCENT	5.6%	79.1%	6.8%	8.6%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 61 below, there is a potential of 2,059 new jobs that could be accommodated based on issued building permits. About 40% of the potential are office/service jobs, the majority in the Southeast and Columbia. This is followed by 40% government and institutional jobs, 14% retail jobs and 7% manufacturing/extensive industrial jobs.

Table 61
Potential Employment from Issued Building Permits
By Use Category, 10/01/08 to 9/30/09

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Columbia	23	268	0	159	451	22%
Elkridge	0	97	126	55	278	13%
Ellicott City	30	57	0	532	619	30%
Rural West	7	0	0	33	40	2%
Southeast	229	401	23	19	672	33%
TOTAL	289	823	149	799	2,059	100%
PERCENT	14.0%	40.0%	7.2%	38.8%	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. This would include a increases in employment from new development as well as 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 22% of Howard County’s employment in 2007 was not reported by the State.

Table 62 shows both DLLR and BEA employment data and the annual increase from 2000 to 2009. BEA data generally has a two year lag time resulting in no available data for 2008 and 2009. Observing the most recent State data, reflecting the first quarter employment data for each year, there has been an average increase of about 2,841 jobs per year for the last 9 years. This is lower than the 2000 General Plan growth target of 4,000 new jobs per year between 2000 and 2010. Jobs reported by the BEA through 2007 report an annual average of 4,122 new jobs, much closer to the General Plan target.

Last year, from 2008 to 2009, the State reports a significant decrease of 5,307 jobs. It should be noted, however, that there was a net increase of 298 jobs in Howard County in this time period due to “non-economic” code changes. Non-economic code changes are address corrections in DLLR’s unemployment insurance file. These corrections generally occur every year. For example, for the 2007 to 2008 time period, 1,508 of the 2,188 job increase were from “non-economic” code changes. For the 2004 to 2005 time period, there was a net loss of 2,083 jobs due to “non-economic” code changes, hence the loss shown for that year. These should be considered when looking at job growth statistics as reported by the State.

Table 63 shows the jobs and average wages by job type as reported by the State for the first quarter of 2008 and 2009. In the first quarter of 2009, the State reported that there were 142,266 jobs in Howard County with an average weekly wage of \$1,038. This compares to 147,385 jobs one year earlier with an average wage of \$1,025. This is a 1.3% increase in average wages over the one year time period.

**Table 62
Jobs in Howard County**

Year	DLLR ¹		BEA ²	
	Jobs	Change	Jobs	Increase
2000	124,843		160,732	
2001	130,717	5,874	166,670	5,938
2002	133,338	2,621	169,425	2,755
2003	133,231	(107)	169,988	563
2004	136,493	3,262	174,753	4,765
2005	135,462	(1,031)	180,218	5,465
2006	141,236	5,774	186,941	6,723
2007	145,385	4,149	189,586	2,645
2008	147,573	2,188	NA	NA
2009	142,266	(5,307)	NA	NA
Average		2,841		4,122

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

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

Table 63
Jobs and Weekly Wages by Industry, 2008 and 2009¹

Job Type	2008		2009	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	621	\$1,105	623	\$1,130
State Government	3,204	\$865	3,252	\$856
Local Government	13,727	\$866	14,152	\$913
Subtotal/Average	17,552	\$874	18,027	\$1,038
Goods Producing				
Natural Resources and Mining	217	\$538	463	\$637
Construction	11,437	\$1,027	10,141	\$1,017
Manufacturing	7,035	\$1,254	6,097	\$1,178
Subtotal/Average	18,689	\$1,107	16,701	\$1,065
Service Providing				
Trade, Transportation, and Utilities	34,221	\$892	31,748	\$873
Information	3,979	\$1,396	3,818	\$1,596
Financial Activities	8,597	\$1,451	8,358	\$1,495
Professional and Business Services	33,208	\$1,471	33,121	\$1,483
Education and Health Services	13,647	\$772	14,556	\$781
Leisure and Hospitality	13,439	\$337	11,657	\$344
Other Services	4,241	\$632	4,280	\$630
Subtotal/Average	111,332	\$1,034	107,538	\$1,056
Unclassified				
TOTAL	147,573	\$1,025	142,266	\$1,038

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

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