



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

May 2015

A Message from the Planning Director:

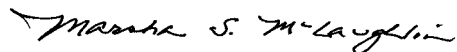
I am pleased to present this year's Development Monitoring System report (DMS). The DMS report has been issued each year since the County Council adopted the Adequate Public Facilities Ordinance (APFO) in 1992. As with last year's report we have included some additional information required per the recent amendments to State law, known collectively as the Smart, Green and Growing legislation. Most of the reporting requirements in the Smart, Green and Growing legislation had already been included in our DMS reports. However, there are some additional smart growth measures and indicators now included such as descriptions of zoning map and text amendments, subdivision regulation amendments, new General Plan elements and amendments, residential density and new infrastructure. The section of this report beginning on Page 7 includes this additional information.

This DMS report summarizes all development activity in the County from initial subdivision sketch plan to final use & occupancy permit. Both residential and nonresidential development are evaluated with comparisons to previous years' development activity going back five years. In 2014 there were 1,829 housing units built in the County. Of these, 29% were single family detached homes, 27% were townhouses and 44% were condo or rental apartments. This is a 19% increase from the 2013 total of 1,535 new homes completed, an indication of the recovering housing market. In 2014, there were 1,833 residential units in approved site development plans (23% single family detached, 33% townhomes, and 44% rental or apartment condos). Once these site plans are approved building permits for these units can then be issued. The trend of larger numbers of rental and condo apartments constructed compared to single family units will continue with the on-going redevelopment of the Route 1 and Route 40 corridors and Downtown Columbia.

Building permits were issued for 915,000 square feet of non-residential space in 2014. This is less than the 1.3 million square feet issued the previous year in 2013, and also less than the 1.1 square feet issued in 2012. This lower trend is likely to continue over the next few years as there were only 583,000 square feet of building space in approved site development plans in 2014, and at the end of 2014 there were only 682,000 square feet of commercial space in the site development plan process awaiting final approval. Despite this slowdown, however, more commercial activity is on the horizon as the redevelopment of Downtown Columbia progresses.

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

Sincerely,



Marsha S. McLaughlin,
Department of Planning and Zoning

Development Monitoring System Report

Date Issued:

May 2015

Reporting Period:

January 1, 2014 to December 31, 2014
With countywide summaries from 2009

Produced by:

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Executive Summary

Adequate Public Facilities Act

The Adequate Public Facilities Act of 1992 addresses “the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist.”

Adoption of the Adequate Public Facilities Act (commonly known as APFO) in 1992 has allowed the County to effectively manage the amount and distribution of residential growth in accordance with growth policy set by the General Plan. Prior to adoption of APFO, the County was averaging more than 3,000 new houses per year. This rate has been reduced by about half since the adoption of the 2000 General Plan, which established the annual number of housing unit allocations for new homes that can move through the development process. Howard County’s latest general plan, PlanHoward 2030 adopted in July, 2012, maintains the same pace of overall housing unit growth but under a new geographic distribution aligned with Designated Place Types in addition to Planning Areas (See PlanHoward 2030 Map 6-2 on Page 6.) This new allocation distribution became effective March 14, 2013 when the APFO legislation was amended to align with PlanHoward 2030.

Also part of APFO are the Open/Closed Schools test, which limits construction in areas of the County facing school overcrowding, and the adequate roads test which determines necessary road improvements. In addition, excise taxes on new construction fund road and school capacity needs to keep pace with new growth.

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

Development Monitoring System Report (DMS)

This is the 23rd annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits. Both approved and currently in-process plans are tabulated. Current year as well as a five year history are discussed. The report is divided into Residential and Non-Residential sections. Map 6-2 from PlanHoward 2030 on Page 6 shows the five Planning Areas that are used in the analysis.

For the third year development activity in Downtown Columbia is included in the DMS report given that the implementation of the Downtown Columbia Plan has begun.

Additional Reporting Requirements and Timeframe

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

DPZ has issued an annual Development Monitoring System (DMS) report since 1992 when the County's Adequate Public Facilities Ordinance was first adopted. This report had covered development activity from October 1 through September 30 each year. Since the new reporting requirement from the State stipulates that the period covered is to be January through December, the DMS has been adjusted to report on a calendar year. This is the fifth DMS report that incorporates this time adjustment and covers calendar year 2014.

Most of the reporting requirements outlined in the Smart, Green and Growing legislation were already covered in the DMS report. There are some additional items, however, that are new. Thus a new section has been added beginning on Page 7. The additional information includes smart growth measures and indicators, planning-related regulatory amendments, and new General Plan elements and amendments. Newly built infrastruc-

ture is also reported on. This is followed by a discussion on whether these changes are consistent with Howard County's General Plan and other policies.

Another key reporting requirement is an analysis of residential development density that occurred during the last calendar year both inside and outside the county's priority funding area (PFA). Related to this is a discussion on Howard County's growth goals, and how recent development and planning activity is consistency with these goals. A discussion on APFO restrictions, which is required to be reported every other year, is also included in this year's report

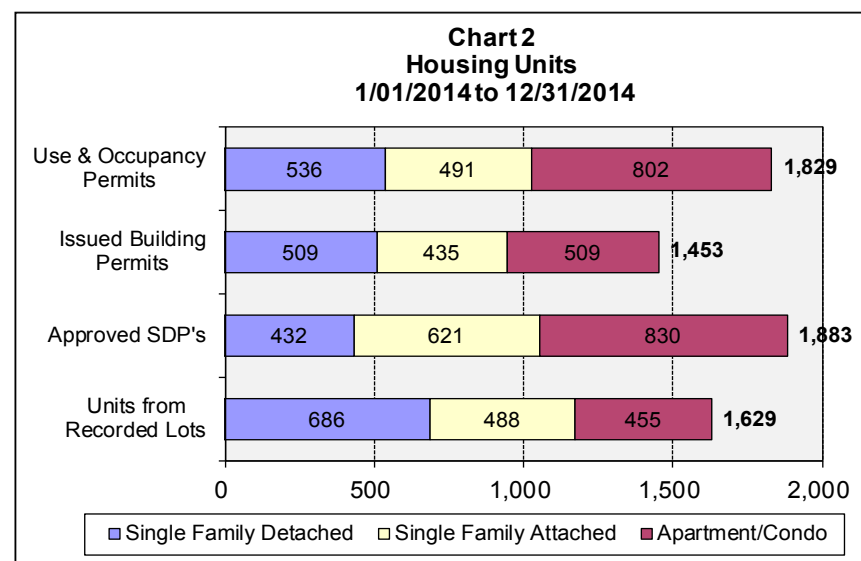
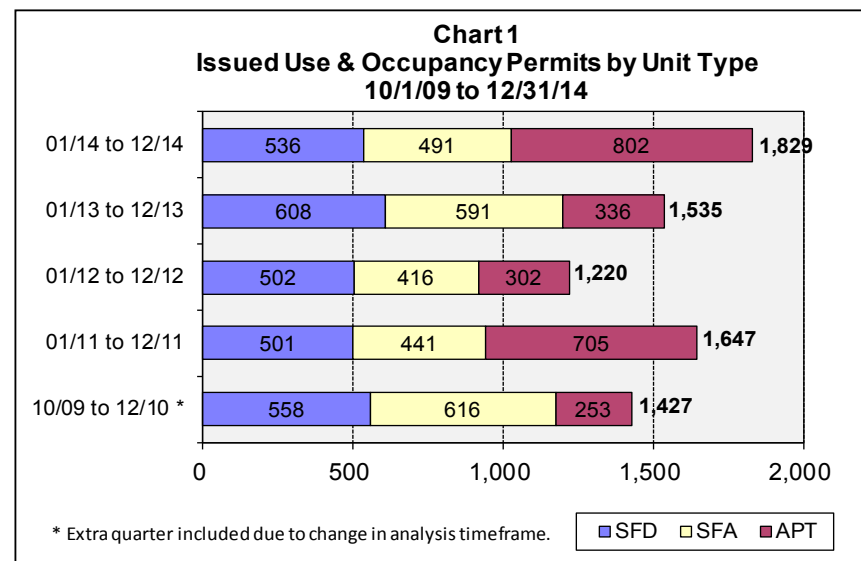
The reporting of these additional items not only meet the State planning requirements, but given that they will be integrated into DPZ's existing reporting process and structure, further context will be created—a context that will enable a better understanding of land development issues, policies and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

Residential Development

Total Housing Activity

- During the latest reporting period, from January through December 2014, 1,829 housing units were built. This is an increase from the previous reporting period when 1,535 units were built, and the most built over each of the last five years (Chart 1).
- Of the 1,829 completed units last year, 29% were single family detached units, 27% were townhouse units and 44% were apartment units (condo or rental). Greater percentages of townhouse and apartment units are likely to persist given the zoning of the remaining undeveloped land in the County as well as higher density redevelopment initiatives.
- Over the last five years, there has been an annual average of 1,459 new housing units built in the County. About 35% of these have been single family detached units, 33% single family attached or townhouse units, and 31% apartment units (including both rental and condo).
- Last year, 34% of all units were built in Elkridge, 23% in Columbia, 18% in Ellicott City, 14% in the Southeast, and 11% in the Rural West. (See map on Page 6 that show these five planning areas.)
- There were 1,453 building permits issued (housing starts) during 2014 (Chart 2). This is 37% less than the 2,317 permits issued in 2013 which included several large apartment project starts in the Route 1 Corridor.
- In 2014 there was potential for 1,629 housing units from recorded lots and 1,883 units approved in site development plans (Chart 2).
- As of December 31, 2014 there were 9,339 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 7,740 units in process for the prior reporting period (December 31, 2013).
- A significant number of the in-process units—8,145 or 87% of the total 9,339—are included in future phases of phased projects with development planned as far out as 2025. The larger phased plans include Laurel Park Station in the Southeast; The Overlook at Blue Stream, Oxford Square, Howard Square and the Park at Locust Thicket in Elkridge; Turf Valley and Westmount in Ellicott City; and the Crescent Property in Downtown Columbia.

- Countywide, 18% of the units in process on December 31, 2014 were single family detached units. About 15% were single family attached units and another 67% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 210 age-restricted housing units built in 2014, 11% of the 1,829 total units built in the County. Of these, 41 were single family detached units, 56 were townhouse units and 113 were apartment or condo units.
- As of December 31, 2014 there were 194 age-restricted units in the planning process, all of which are apartment or condo units. Of these, 162 units are in Ellicott City (The Gatherings at Ellicott's Retreat) and 32 units in the Southeast (Cherrytree Park). For the previous reporting period there were 360 age-restricted units in process, 166 more than the current year.

Moderate Income Housing Units

- During 2014 there were 177 MIHU units in approved plans – 91 townhouse units and 86 apartment or condo units. This is almost three times as many as the 62 approved MIHU units the previous reporting period.
- As of December 31, 2014 there were 728 MIHU units in process – 3 single family detached units, 150 townhomes and 575 apartment or condo units. About 77% of the units were in Elkrigde, 21% in the Southeast, and 2% in Ellicott City. By comparison, there were 779 MIHU units in process the previous reporting period.
- Of the 728 MIHU units in process, 4 are age-restricted. These 4 are part of the 32 unit Cherrytree Park project in the Southeast.

Rural Land Preservation

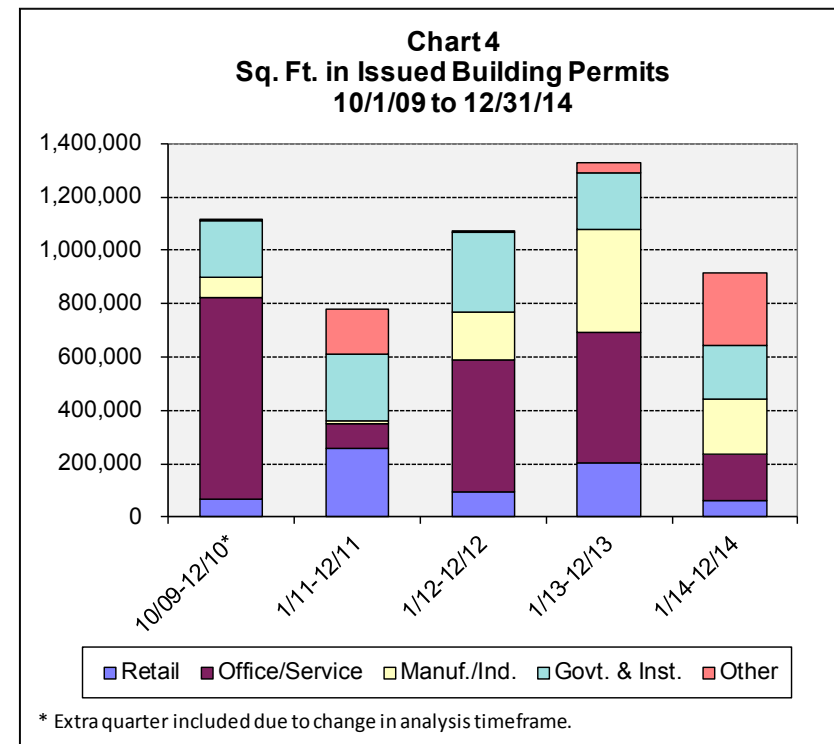
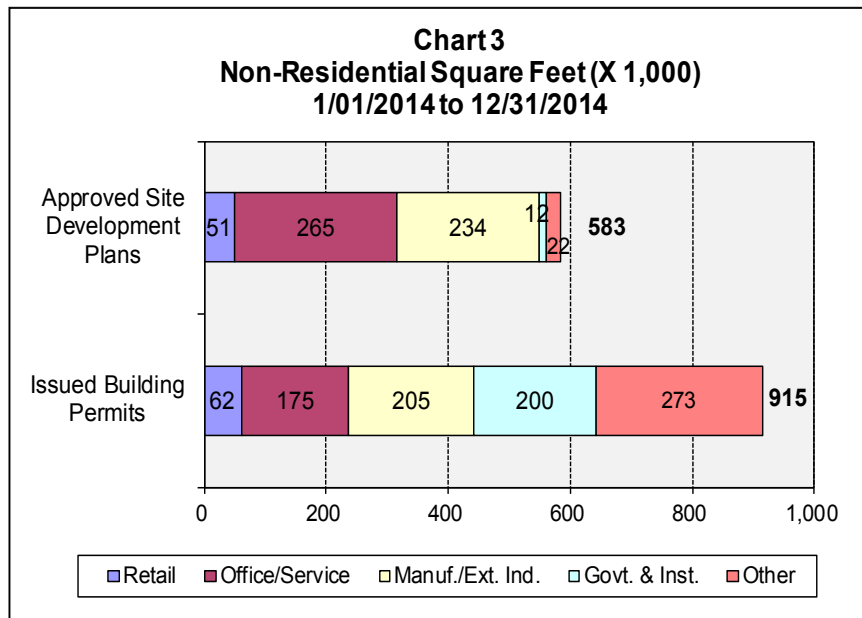
- In 2014 five settlements totalling 358 acres were added to the County's Agricultural Land Preservation Program. An additional 268 acres of environmentally sensitive land were permanently preserved in the Rural West through subdivision activity using the cluster subdivision zoning regulations and Density/Cluster Exchange Options (DEO/CEO).
- Preservation easements in the Rural West have been steadily increasing and now total 30,327 acres. This includes 22,010 acres of agricultural preservation easements and 8,317 acres of environmental preservation parcels dedicated through the subdivision process. This totals 32% of all land in the Rural West. Including park land, WSSC land and other environmental easements, 44% of the Rural West is now permanently preserved.

Non-Residential Development

- From January through December 2014, close to 600,000 square feet of building space were approved in site development plans. Building permits were issued for slightly more than 915,000 square feet. (Chart 3).
- As shown in Chart 4 there was a decrease in the square footage of issued building permits last year, from 1.3 million square feet issued in 2013 to 915,000 square feet issued in 2014.
- Over the last five years, there was an annual average of 740,000 square feet in approved non-residential site development plans and 990,000 square feet in non-residential issued building permits.
- About 47% of the new building space constructed last year is located in the Southeast and 23% in Elkrige. About 16% of the total was construct-

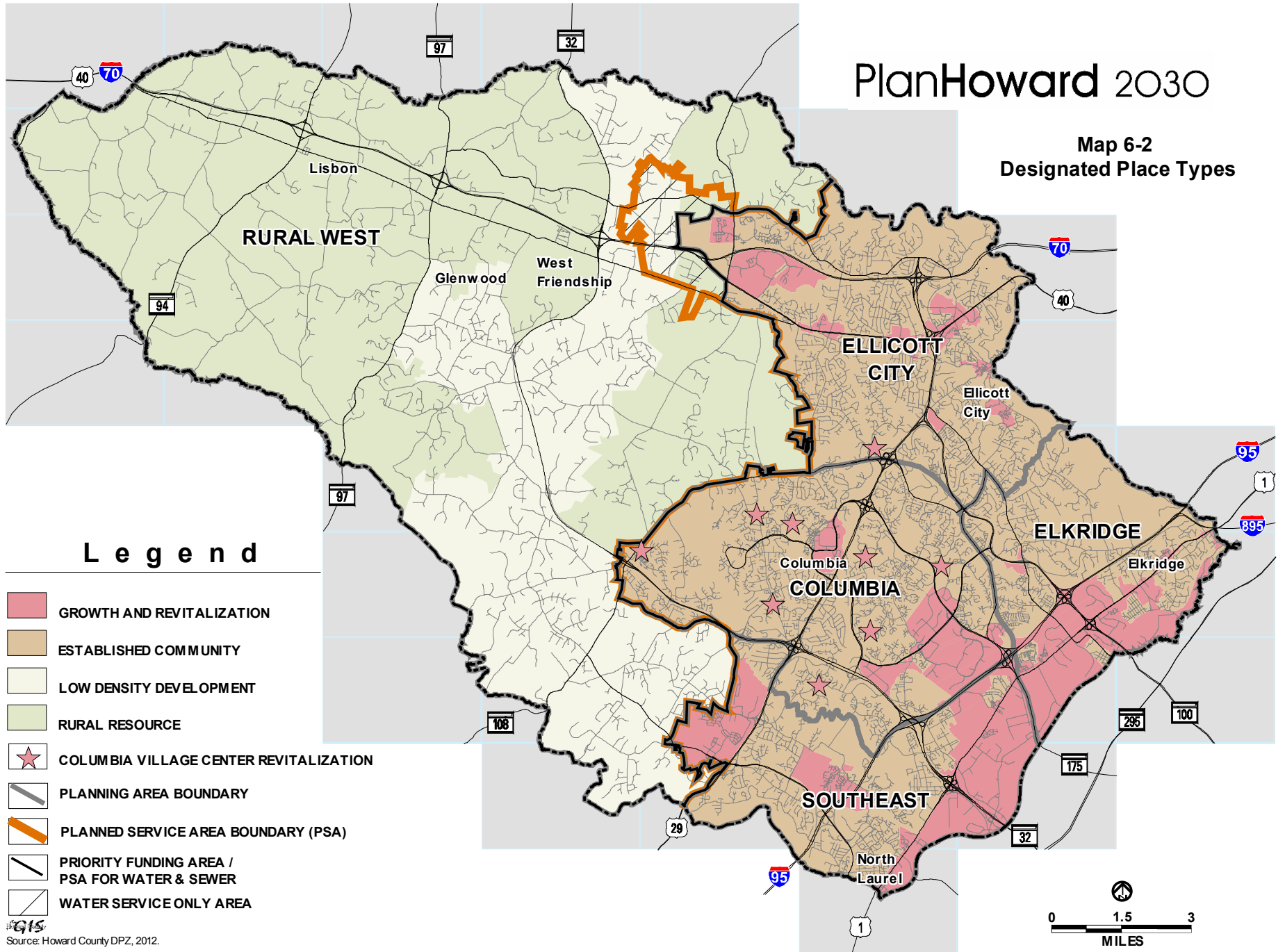
ed in Columbia (non-Downtown), 14% in Ellicott City, and 1% in the Rural West. There was no non-residential building space built in Downtown Columbia last year.

- As of December 31, 2014, there were 682,000 square feet of non-residential in-process in site development plans. This is more than the 620,000 square feet in process the previous year.
- According to the State Department of Labor, Licensing and Regulation, the County lost 449 jobs last year (1st quarter 2013 to 1st quarter 2014 statistics). The total number of jobs in Howard County as of the 1st quarter 2014 is 155,951.



PlanHoward 2030

Map 6-2
Designated Place Types



Legend

- GROWTH AND REVITALIZATION
- ESTABLISHED COMMUNITY
- LOW DENSITY DEVELOPMENT
- RURAL RESOURCE
- ★ COLUMBIA VILLAGE CENTER REVITALIZATION
- PLANNING AREA BOUNDARY
- PLANNED SERVICE AREA BOUNDARY (PSA)
- PRIORITY FUNDING AREA / PSA FOR WATER & SEWER
- WATER SERVICE ONLY AREA

Source: Howard County DPZ, 2012.

Smart Growth Information

Smart, Green and Growing Legislation

This section of the DMS report has been produced to satisfy amendments to State law enacted in 2009, known collectively as the Smart, Green and Growing legislation. All jurisdictions in Maryland are required to report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions. (Note that reporting on APFO restrictions are required every other year. Reporting on this will be included in next year's DMS report.) These reports are due in July covering development activity for the previous calendar year.

This DMS report, issued annually by DPZ as required by the county's 1992 APFO law, already includes most of what is required per the State law and these items continue to be covered in the subsequent sections of this report. There are some additional items, however, that were not included. The purpose of this section is to cover these additional items.

This section summarizes planning-related regulatory activity including zoning map and text amendments, subdivision and land development regulation amendments, and new General Plan elements and amendments. Newly built infrastructure is also reported on, including new roads and other major transportation facilities, major water and sewer facilities, and new schools and school additions. A discussion on whether these changes are consistent with Howard County's General Plan follows.

Another key reporting requirement is residential development density that occurred during the last calendar year both inside and outside the county's Priority Funding Area (PFA). Related to this is a discussion on Howard County's growth goals and how recent development and planning activity is consistent with these goals.

Regulatory Activity

General Plan Amendments and Related Legislation in Support of the General Plan

CR 22-2014 — Long Reach Village Center Property Acquisition

In accordance with Howard County's Urban Renewal Law, this resolution finds that certain properties in the Long Reach Village Center in Columbia constitute a blighted area, finds that the rehabilitation or redevelopment of these properties by means of an Urban Renewal Project is in the interest of the health, safety and welfare of County residents, establishes the area in which the Project will take place, authorizes the acquisition of certain properties, and authorizes the preparation of plans required for the Project.

CB 9-2014 — Route 1 Tax Credit

This bill establishes a real property tax credit for properties located adjacent to Route 1 that are renovated, upgraded, or rehabilitated, under certain conditions, and provides for an application procedure and administration of the credit.

CR 27-2014 — Howard County Historic Preservation Plan

This resolution adopts the Howard County Historic Preservation Plan in accordance to the goals and objectives of PlanHoward 2030. The purpose of this plan is to provide guidance and direction for the current and future preservation of Howard County's non-renewable historic and cultural resources, as well as to ensure that the County's future plans for growth will protect historic resources in a coordinated, recognized and measured manner.

CB 18-2014 — Amendments to the Rehabilitation Loan Program and MIHU Provisions

This bill amends the County's Rehabilitation Loan Program to allow loans for renovations and expansions, amends the moderate income housing unit provisions to prohibit certain alternatives in certain areas, requires the use of fee in lieu funds for homeownership opportunities in certain areas, and prohibits the Department of Housing and Community Development and the Housing Commission from participating in housing projects in already existing low income areas of Howard County.

CR 87-2014 — The 2015 Patuxent River Policy Plan

This resolution approves and adopts the 2015 Patuxent River Policy Plan. This plan is an update from the 1997 Plan and is a joint effort of many local governments and units of State government.

CR 90-2014 — Payment in Lieu of Taxes for Solar Array

This resolution approves the terms and conditions of a Payment in Lieu of Taxes Agreement by and between Howard County, Maryland and 2800 Nixon's Farm Lane, LLC regarding the construction and operation of a solar array located on the property known as Nixon's Farm.

CR 95-2014 — Application for Main Street Maryland Designation

This resolution approves an application to the State of Maryland for the Main Street Maryland designation by the State Department of Housing and Community Development, indicates support for the Main Street Maryland Program in Ellicott City, Maryland, and authorizes certain actions necessary to carry out the intent of this resolution.

CR 96-2014 — Patapsco Heritage Area Management Plan

This resolution approves authorizes the submittal of a Management Plan for the certification of the Patapsco Heritage Area as a Certified Maryland Heritage Area.

CB 47-2014 — Agricultural Preservation Installment Purchase Agreement

This bill approves and provides for a multi-year Installment Purchase Agreement by Howard County, Maryland to acquire development rights in approximately 81.4 acres of agricultural land located at 12570 Highland-Laurel Road, in Highland, Howard County, Maryland.

CB 48-2014 — Agricultural Preservation Installment Purchase Agreement

This bill approves and provides for a multi-year Installment Purchase Agreement by Howard County, Maryland to acquire development rights in approximately 57.4 acres of agricultural land located on Annapolis Rock Road, in Woodbine, Howard County, Maryland.

CB 36-2014 — Plug-In Vehicles

This bill prohibits a person from stopping, standing, or parking a vehicle that is not a plug-in vehicle in a parking space that is designated for the use of plug-in vehicles and provides access to a plug-in vehicle recharging station, establishes sign standards for certain plug-in vehicles, and authorizes property owners to have a vehicle that is in violation of this Act towed or removed under certain circumstances.

CR 114-2014 — Payment in Lieu of Taxes for Senior Housing Renovation and Operation

This resolution approves the terms and conditions of a Payment in Lieu of Taxes Agreement by and between Howard County, Maryland and Ellicott LLP, a limited liability limited partnership, for the renovation and operation of an existing 81 unit senior rental housing project known as Park View at Ellicott City.

CR 120-2014 — Columbia Downtown Housing Corporation

This resolution requests the Columbia Downtown Housing Corporation to consider whether legislative changes are necessary and appropriate to ensure that the Downtown Columbia Plan's vision for a full spectrum of affordable housing can be achieved and to recommend any changes believed necessary and appropriate to the County Council and County Executive.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County in 2014. Related land use legislation is also included.

CB 1-2014 — Amending the TOD District

This bill amends the TOD zoning district to allow Light Industrial as a permitted use, if such a use is well separated from the areas immediately around a MARC station, where the higher density core would first be established and extended outward over time. The TOD district was also amended to allow single-family attached dwellings as a permitted use for projects greater than 3 acres and encompassing less than 50 acres that is entirely located more than 2,000 feet from a marc station, provided that the minimum density shall not apply and that such dwellings shall not occupy more than 40% of the gross development of such a project.

CR 28-2014 — Recommending Denial of Termination of MALPF Easement

This resolution recommends the denial of Elizabeth Mullinix's request to terminate a Maryland Agricultural Land Preservation Foundation (MALPF) easement on property located on the south side of Carrs Mill Road, containing approximately 142 acres, more commonly known as the "Clevenger Farm." Per State law, an established MALPF easement may only be terminated under extraordinary circumstance and with the approval of the County's governing body. Subsequent to this resolution adopted by the County, the State also denied the termination request.

CR 38-2014 — Environmental Impacts of Locating Composting Facility and Mulch Manufacturing Uses

This resolution requests that the Howard County Sustainability Board review the potential environmental impacts of locating Composting Facility & Mulch Manufacturing uses on agricultural land in Howard County and make a recommendation to the County Council and requests the County Executive to provide appropriate county resources to support this effort.

CR 39-2014 — Fueling Stations

This resolution creates a task force to study standards and related parking issues for locating fueling stations and to recommend standards for locating such facilities.

CB 19-2014 — MXD-6 Zoning

This bill amends the Howard County Zoning Regulations to change certain bonus density options and percentages of employment land use areas that apply when age-restricted adult housing is provided in MXD-6 developments, and amends the process for certain Preliminary Plan amendments under certain conditions.

CB 20-2014 — Composting, Sawmills and Mulch Manufacturing

This bill amends the Howard County Zoning Regulations to remove references to composting and to limit areas where sawmills and mulch manufacturing are permitted.

Subdivision & Land Development Regulation Amendments (and related)

The following highlights all amendments to the Subdivision & Land Development Regulations (and other land use related code amendments) that were approved in Howard County in 2014.

CB 55-2013 — Temporary Use Provision Amendments

This bill amends the Howard County Subdivision and Land Development regulations to delete language concerning the Department of Planning and Zoning's authority to grant Temporary Uses of land. The deletion of this language is necessary to ensure consistency between the County Code and the recently amended zoning regulations.

CB 10-2014 — Forest Conservation Amendments

This bill amends the Howard County Forest Conservation regulations, which are in Subtitle 12 of the Subdivision and Land Development regulations, to allow for certain fees-in-lieu to be used to create urban tree canopies and for the maintenance of existing forests in accordance with State law.

CB 11-2014 — Historic Preservation Amendments

This bill amends the Howard County Historic Preservation regulations, which are in Subtitle 6 of the Subdivision and Land Development regulations, to change the name of the Historic District Commission to be the Historic Preservation Commission, defines certain terms, allows for certain single-site historic districts, clarifies certain membership of the Commission, extends certain voting deadlines, clarifies the advisory role of the Commission, clarifies certain powers of the Commission and staff, and clarifies certain appeal provisions.

CR 93-2014 — Adopting the Housing Unit Allocation Chart

This resolution adopts the Housing Unit Allocation Chart for Fiscal Year 2015 pursuant to the Adequate Public Facilities Act of Howard County.

CR 94-2014 — Adopting the Open/Closed Schools Chart

This resolution adopts the Open/Closed Schools chart for Fiscal Year 2015 pursuant of the Adequate Public Facilities Act of Howard County to designate the school regions and school districts that are open for residential development.

CB 33-2014 — Presubmission Community Meetings

This bill amends the Howard County Subdivision and Land Development regulations to revise the requirements that developers of residential property hold community meetings before submitting their development plans for County approval.

Zoning Map Amendments

There were no piecemeal zoning map amendments in 2014. This is to be expected given that just last year the County's Comprehensive Zoning Plan was adopted. Comprehensive Zoning is conducted only about once every 10 years after a new General Plan is adopted. The recently approved Comprehensive Zoning Plan in 2013 re-zoned 159 parcels totalling 702 acres adding a net additional capacity of 1,862 residential units. Please refer to last year's DMS for further discussion on this as well as a map showing where the rezonings occurred in the County.

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2014, 6.79 miles of new or extended roadway were constructed in Howard County. These additions were built in 20 new subdivisions as part of developer's agreements executed with the County. A total of 0.06 miles of roadway was abandoned in 2014. There was one road realigned through the County's capital project process resulting in a net addition of .03 road miles (Ilchester Landing relocated to opposite Ilchester Point Circle). Detailed information about all roadway construction projects is documented in Howard County's 2014 annual report to the State Highway Administration. The road additions are all shown on Map 1.

New Schools, School Renovations and Additions to Schools

The Howard County Public School System completed a major classroom addition and the new Thomas Viaduct Middle School in the 2014 calendar year. The concentration of the renovation and expansion efforts continues to be within the priority funding area.

Thomas Viaduct Middle School

Thomas Viaduct Middle School is a new 95,838 square foot school with a capacity of 701 6th through 8th grade students and was built to provide relief to crowded schools in the northeast region. The environmental sustainability features of the building are expected to attain a LEED silver rating.

Running Brook Elementary School Addition

The Running Brook Elementary School project addresses the population growth of Columbia West region due to the redevelopment of Downtown Columbia into a higher density mixed use community. To address this growth, the project provides at least 100 seats of additional classroom space by adding a two-story addition, cafeteria expansion and additional core infrastructure space necessary to operate effectively as a larger school. This expansion improves the utility and effectiveness of the existing academic support spaces.

Other Major Community Facilities and Infrastructure

In 2014, the Department of Public Works completed construction and placed into operation a new Solar Energy Project at the Little Patuxent Water Reclamation Plant (LPWRP), which provides an additional energy source for non-process related uses. Additionally, a variety of pipeline, pumping station and other LPWRP related facility improvements are currently underway and scheduled for completion in 2015. These include a complete backup power generation system at the plant, a new North Laurel Sewage Pumping Station, a relocated Whiskey Bottom Water Pumping Station, and construction of the new Southwest water transmission main from Baltimore County. The Fort Meade Reclaimed Water System is nearly complete.

The installation of the main portions of Howard County Fiber Network project was completed in 2014. This has been a multi-year project as part of the Inter-County Broadband Network project, which was created to provide affordable, accessible high-speed broadband access to community institutions, businesses and residents throughout central Maryland.

A major \$5.8 million renovation of the Savage Branch of the Howard County Public Library System was completed in 2014.

A bridge replacement near 8150 Old Montgomery Road, which crosses under Route 100 and over the Deep Run tributary was completed in 2014 at a cost of \$1.7 million.

Consistency

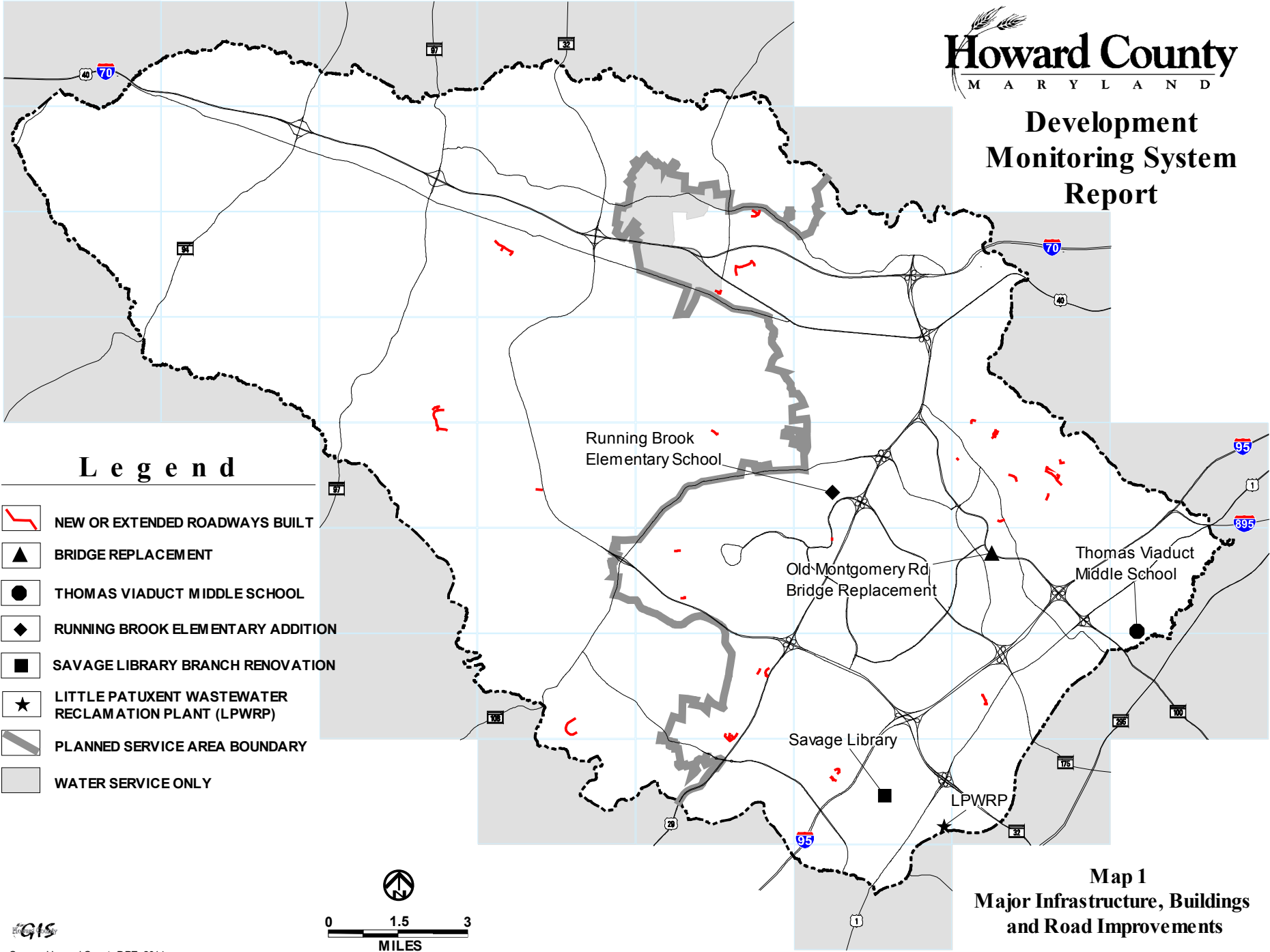
The Smart, Green and Growing Legislation requires that development patterns and infrastructure improvements that have occurred over the last year be evaluated for consistency with adopted local plans. An evaluation of whether these changes are consistent with each other as well as the adopted plans of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

Overall, private development, new infrastructure and regulatory and zoning map amendments that took place in Howard County last year are consistent with our local plans—most importantly the county’s General Plan known as PlanHoward 2030—as well as with each other and the adopted plans of adjoining jurisdictions.

Howard County’s growth policy is to concentrate higher density development in the eastern portion of the county while preserving the Rural West. The development patterns and regulatory initiatives summarized in this report continue to support this goal. For example, all the major community facilities and school projects that have been completed in 2014 are located within the Priority Funding Area. The designation of Ellicott City as a Main Street Maryland Designation also furthers growth and revitalization within the Priority Funding Area. The acquisition of the Long Reach Village Center for future redevelopment and the Route 1 Tax credit will also help realize the County’s redevelopment goals.



Development Monitoring System Report



Legend

- NEW OR EXTENDED ROADWAYS BUILT
- BRIDGE REPLACEMENT
- THOMAS VIADUCT MIDDLE SCHOOL
- RUNNING BROOK ELEMENTARY ADDITION
- SAVAGE LIBRARY BRANCH RENOVATION
- LITTLE PATUXENT WASTEWATER RECLAMATION PLANT (LPWRP)
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY



Map 1
Major Infrastructure, Buildings
and Road Improvements

Lot Densities

The information provided in the subsequent sections of this report include details on the amount, type and location of development in Howard County in 2014. Progress on land preservation is also reported on. The Smart, Green and Growing legislation now requires all jurisdictions in Maryland to report on net density of growth both inside outside priority funding areas (PFA).

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

Lot Density by Planning Area

Table 1 shows the lot density of residential development in 2014 based on building permit completions. A weighted average of density is calculated from built dwelling units and their associated lot size. Note that for multiple units built on a single parcel, only completed projects are included. For example, if only one apartment building on a parcel is completed in 2014, but the parcel is to include more than one building, then that project and associated density is not counted in the current year. It will be counted in a future year when the entire project is finished. This also applies to rental and condo apartments and condo townhomes.

The greatest average lot density occurred in Elkridge at 44.41 units per acre based on 628 units built. This was followed by Columbia at 17.92 units per acre, the Southeast at 14.09 units per acre, and Ellicott City at 12.62 units per acre. The Rural West, as expected, had the lowest average lot density at 0.89 units per acre. This is shown graphically in Chart 5.

Lot Density Inside Versus Outside PFA

Table 2 shows the lot density inside and outside the PFA. Outside the PFA is the combined results of all planning areas excluding the Rural West. Combining all east county planning areas results in a lot density of 25.37 units per acre. This compares to a much smaller lot density of 0.89 units per acre outside the PFA.

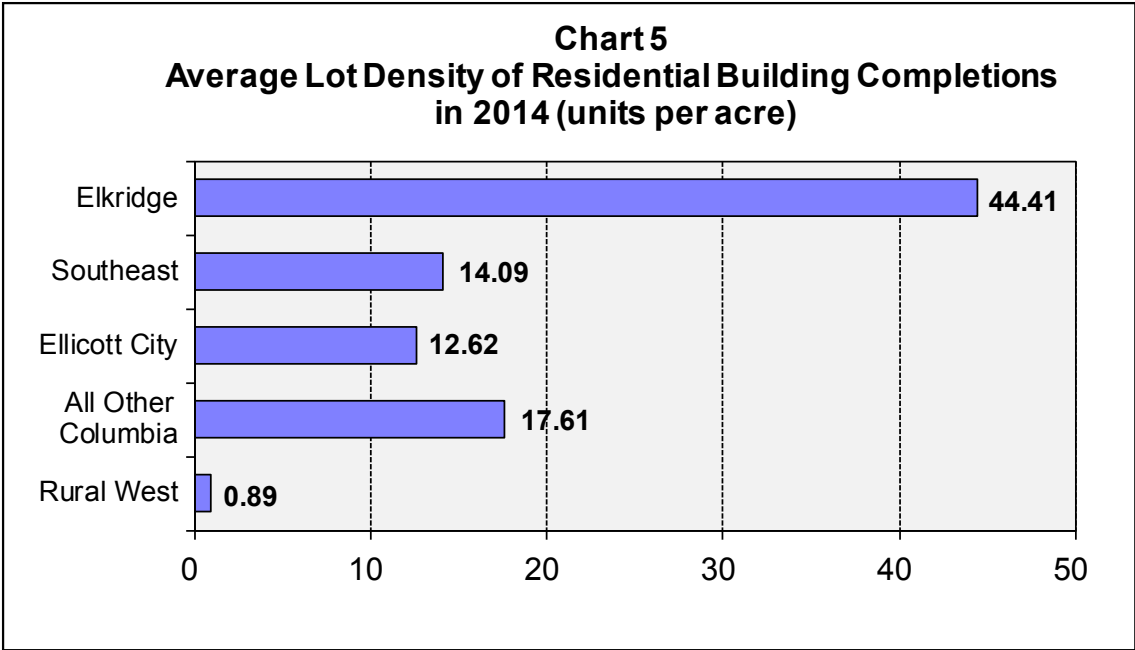
Map 3 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2014 - By Planning Area

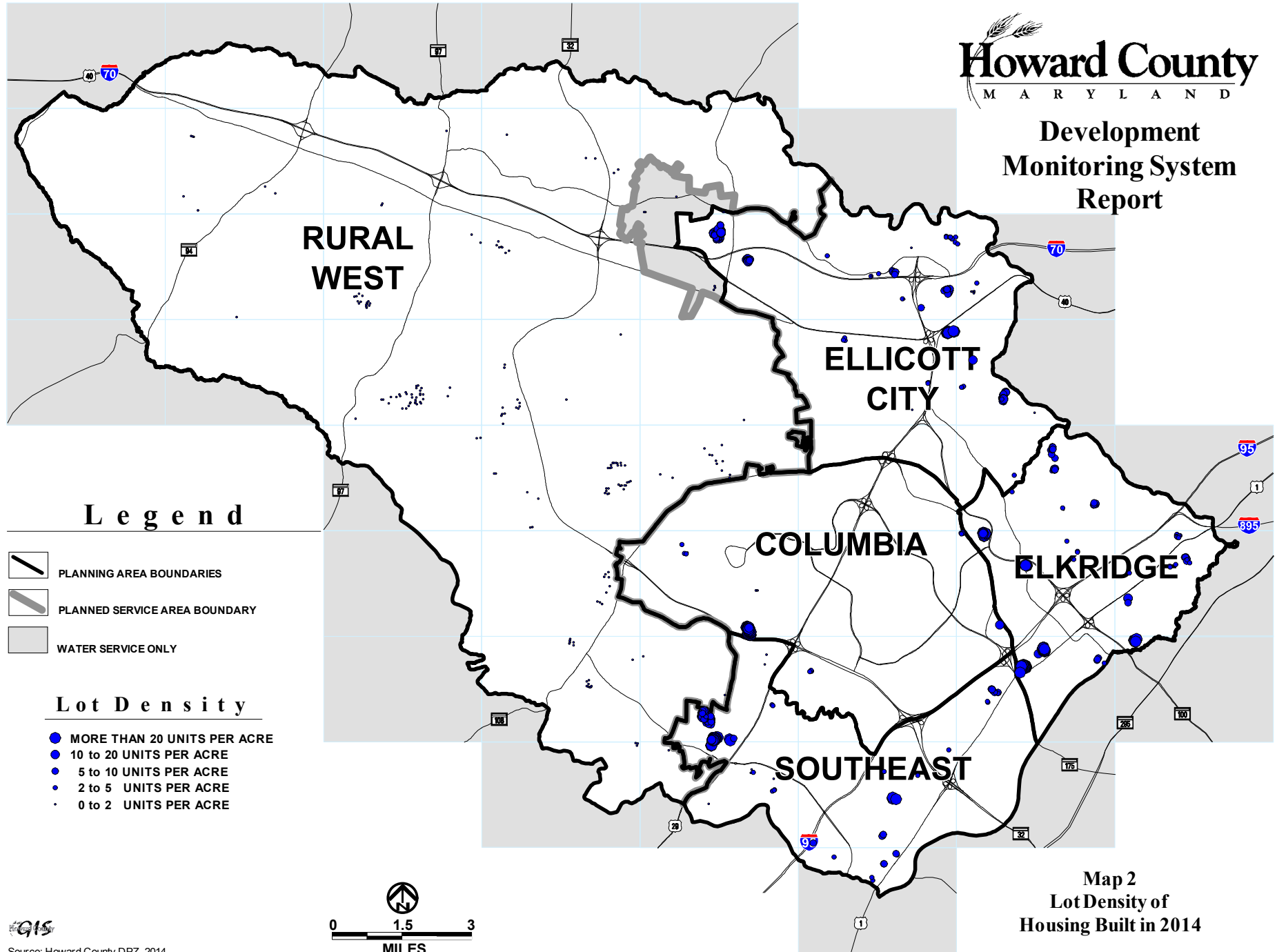
Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Downtown Columbia	0	0%	0	0%	NA
All Other Columbia	427	22%	30	6%	17.61
Elkridge	628	32%	36	7%	44.41
Ellicott City	477	24%	68	13%	12.62
Rural West	196	10%	359	68%	0.89
Southeast	227	12%	31	6%	14.09
TOTAL	1,955	100%	525	100%	22.92

Table 2
Lot Density of Total Units Built in 2014 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,759	90%	166	32%	25.37
Outside PFA	196	10%	359	68%	0.89
TOTAL	1,955	100%	525	100%	22.92



**Development
Monitoring System
Report**



Local Growth Goal

The Smart, Green and Growing legislation stipulates that the statewide land use goal is to increase the percentage of growth located within the Priority Funding Areas and to decrease the percentage of growth located outside the Priority Funding Areas (PFA). Under the legislation local jurisdictions are required to report on their local goal, the timeframe for achieving the local goal, the resources necessary for infrastructure inside the priority funding area and land preservation outside the priority funding area, and any incremental progress made towards achieving the local goal.

Howard County's Growth Goal

The basis for Howard County's growth goal is the latest general plan, known as PlanHoward 2030, adopted in July, 2012. This plan specifically indicates how many units are to be built each year both inside and outside the County's Priority Funding Area. The County's Adequate Public Facilities Ordinance (APFO) is the mechanism to ensure that this growth goal is adhered to.

PlanHoward 2030 reduces the annual number of housing unit allocations outside the Priority Funding Area in the Rural West to 100 per year. It had been 150 per year just prior to PlanHoward 2030 based on recent amendments to APFO. Prior to that with the adoption of the 2000 General Plan in November of 2000 the number had been 250 per year. The initial reduction from 250 units to 150 units were based on the re-allocation of 100 units to a new "Green Neighborhood" allocation pool. To receive Green Neighborhood allocations, the project must meet both site and building design criteria for environmental sustainability. Green Neighborhood projects may be located anywhere in the County. With the recent adoption of PlanHoward 2030 an additional 50 units were shifted from the Rural West to the Green Neighborhood allocation pool. This policy change therefore not only potentially reduces the annual number of units built outside the PFA, but also promotes more sustainable development within the County.

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

Table 3 summarizes future growth based on PlanHoward 2030 to the year 2030. A total of 1,600 units are allocated to areas outside the PFA, representing only 4.8% of all units countywide. The remaining 95.2% of units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2014 unit counts, 12.4% of all housing units in the County are outside the PFA. The remaining 87.6% are inside the PFA. This is summarized in Table 4.

Comparing this to the PlanHoward 2030 policy of allocating only 4.8% of future units to areas outside the PFA it is clear that progress towards the goal of decreasing the percentage of growth outside the PFA is being met. Table 5 below shows total units built and allocated by 2030. The percentage of total units outside the PFA will decrease between now and then, from 12.4% currently to 10.6% in 2030.

Table 3
PlanHoward 2030 Growth Projections
2014 to 2030

Inside PFA	31,750	95.2%
Outside PFA	1,600	4.8%
Total	33,350	100.0%

Table 4
Total Built Units in Howard County
September 30, 2014

Inside PFA	99,185	87.6%
Outside PFA	13,978	12.4%
Total	113,163	100.0%

Table 5
Total Units by 2030 based on PlanHoward 2030

Inside PFA	130,935	89.4%
Outside PFA	15,578	10.6%
Total	146,513	100.0%

Resources to Achieve Goal

Besides the County's APFO described above that regulates the timing and location of growth, the Agricultural Land Preservation Program, described in detail beginning on Page 45 of this report, also helps reduce development capacity outside of the PFA while preserving land. The County's rural zoning is an additional mechanism preserving environmental or agricultural easements in place of housing units through a density transfer mechanism. This has been in place since the early 1990s.

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

The County has also created higher density mixed-use zones along redevelopment areas such as Route 1 and Route 40 over the last decade. These higher density zones have been further increased with last year's adoption of the 2013 Comprehensive Zoning Plan. This zoning approach has created additional capacity in the east concentrating growth there rather than the Rural West part of the County outside the PFA.

Furthermore, with the adoption of PlanHoward 2030, Designated Places and Growth Tiers are now established in Howard County further limiting growth in the Rural West and concentrating growth in redevelopment areas within the Priority Funding Area. Please refer to PlanHoward 2030 for a discussion on and maps depicting the Designated Places and Growth Tiers in Howard County.

Residential Development

Recorded Residential Subdivisions

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

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

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units, such as apartment buildings and condominium developments on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on in 2014 were recorded or in existence prior to 2009, the first year of this current DMS analysis period. Therefore, units from recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential plans recorded, the number of potential units from recorded lots, and the acreage of plans recorded have been compiled by the planning areas shown on the Designated Places Map on Page 6 plus Downtown Columbia as it's own area.

Summary of Latest Reporting Period

For the latest reporting period from January 1, 2014 through December 31, 2014, there was potential for 1,629 housing units from recorded lots countywide in 122 subdivision plans totaling 2,517 acres (Table 6). The Southeast had the most with 1,021 units, 63% of the total. Elkridge had 289 units, 18% of the total. Ellicott City had potential for 224 units, 14% of the total. There were 87 units in recorded subdivision plans in the Rural West (5%) and 8 units in Columbia. These represent net new unit potential

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

Of the total 2,517 acres recorded, 1,304 acres, or about 52%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity given that these figures include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

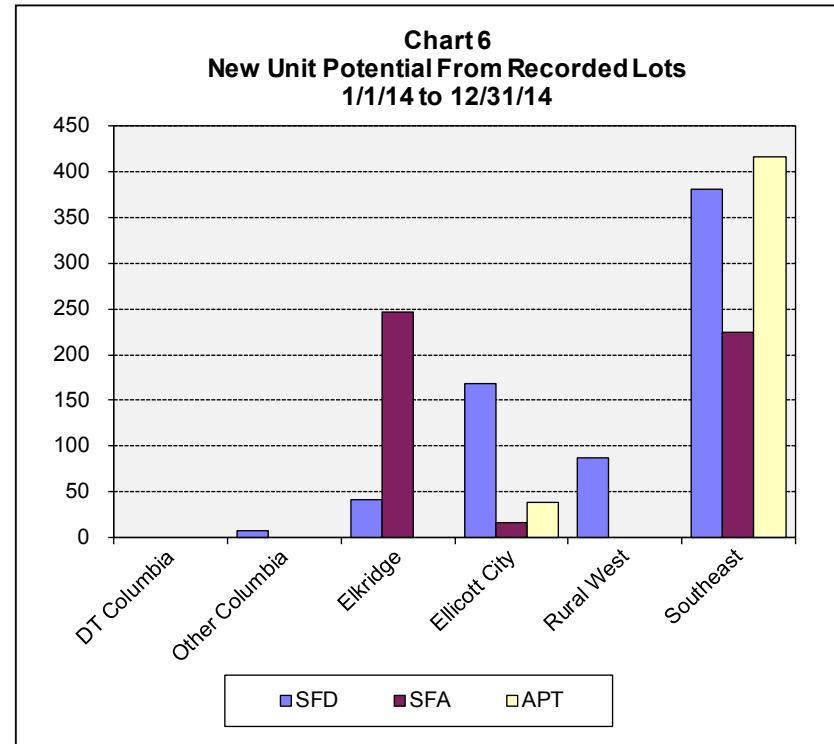
Table 7 shows new units from recorded lots by unit type. Of the 1,629 units from recorded lots, 686 are for single family detached units (SFD), 488 are for single family attached or townhouse units (SFA), and 455 are for apartment units (both rental and condo). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions, 1/01/14 to 12/31/2014

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	8	0%	6	5%	39	2%
Elkridge	289	18%	25	20%	211	8%
Ellicott City	224	14%	28	23%	594	24%
Rural West	87	5%	42	34%	1,304	52%
Southeast	1,021	63%	21	17%	368	15%
TOTAL	1,629	100%	122	100%	2,517	100%

Table 7
Unit Potential from Recorded Lots by Unit Type, 1/01/14 to 12/31/2014

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	8	0	0	0	8	0%
Elkridge	42	247	0	0	289	18%
Ellicott City	168	17	39	0	224	14%
Rural West	87	0	0	0	87	5%
Southeast	381	224	416	0	1,021	63%
TOTAL	686	488	455	0	1,629	100%
PERCENT	42%	30%	28%	0%	100%	

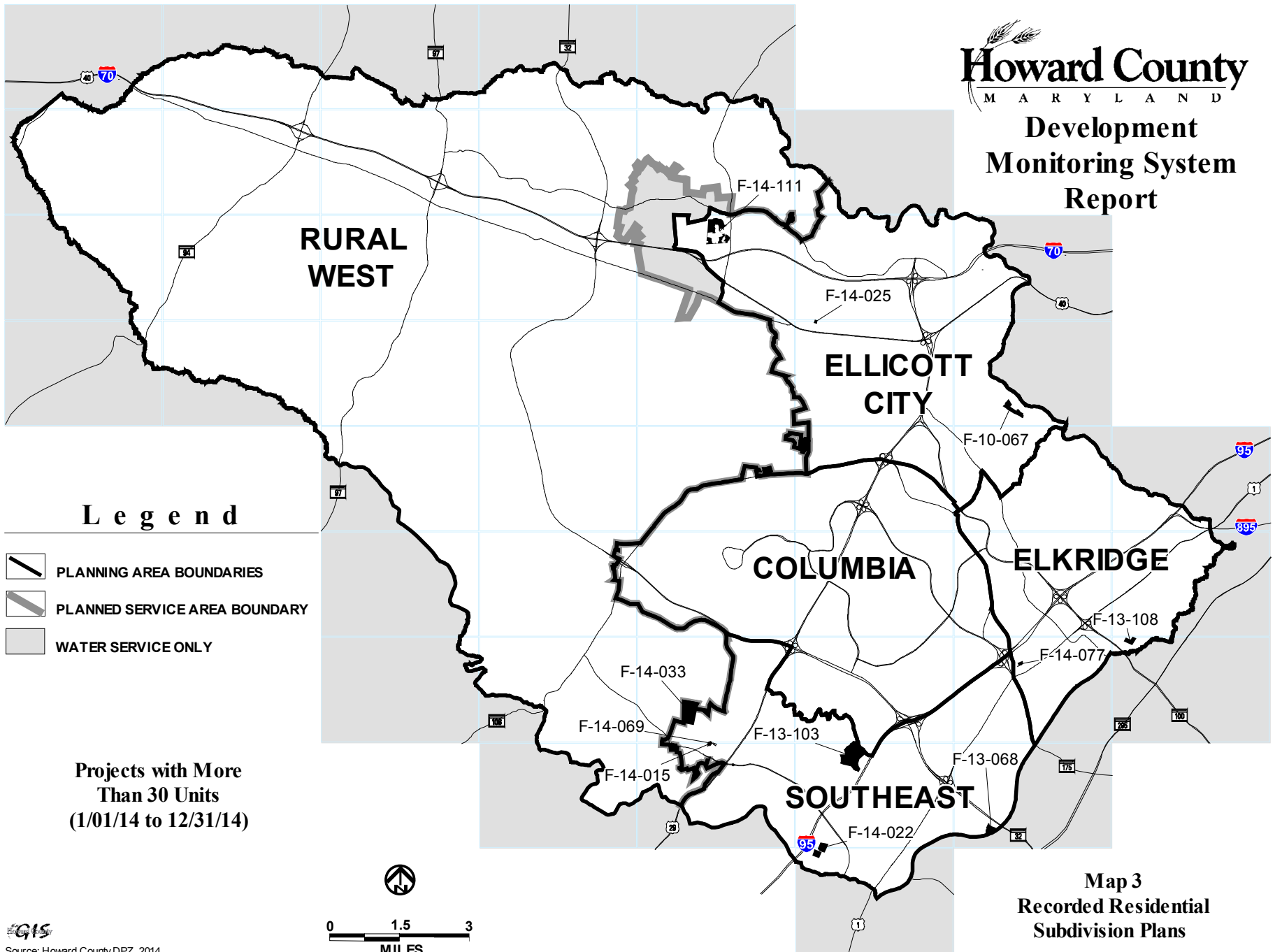


Last Year's Projects - Greater than 30 Units

Of the total 1,629 units from lots recorded for the latest reporting period, 1,242 or about 76% were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 8, are located in three planning areas. The precise location of these plans are shown on Map 4.

These larger plans include Oxford Square and Howard Square in Elkridge; Waverly Woods, Orchard Park and Autumn River in Ellicott City; and Annapolis Junction Town Center, Wincopia Farms, three Maple Lawn Farms projects, and High Ridge Meadows in the Southeast.

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



Legend

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

**Projects with More
Than 30 Units
(1/01/14 to 12/31/14)**

**Map 3
Recorded Residential
Subdivision Plans**

Source: Howard County DPZ, 2014.

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 1/01/14 to 12/31/14

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-13-108	Oxford Square	SFA - 13 MIHU	101	202
	F-14-077	Howard Square	SFA	101	
Ellicott City	F-14-111	GTW's Waverly Woods, Sec. 12	Age Restricted SFD, SFA	90	164
	F-14-025	Orchard Park, Sec. 3	APT - 4 MIHU	39	
	F-10-067	Autumn River - Ph. 3	SFD, SFA	35	
Southeast	F-13-068	Annapolis Junction Town Center	APT - 32 MIHU	416	876
	F-13-103	Wincofia Farms	SFD, SFA	220	
	F-14-033	Maple Lawn Farms Garden District	SFD	98	
	F-14-022	High Ridge Meadows, Sec. 1	SFD	54	
	F-14-015	Maple Lawn Farms	SFA	53	
	F-14-069	Maple Lawn Farms Westside Dist. Area 5	SFA	35	
TOTAL					1,242

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in October 1, 2009. (Note there is an extra quarter included due to the change in the analysis timeframe.) Over this time period lots for 5,927 units countywide in 523 subdivision plans totaling 10,549 acres were recorded. This equates to an annual average of 1,129 units per year.

Note that the acreage figure represents all acreage on recorded plats including open space and preservation easements, as well as resubdivisions, sending and receiving preservation parcels, and recordations that do not

add any new units such as recording for the purpose of adding easements or adjusting parcel lines.

Table 10 summarizes the number of units from recorded lots by unit type for each of the last five reporting periods. Over this timeframe, recorded lots created the potential for 2,021 single family detached units, 34% of the total 5,927. A total of 1,911, 32%, were for single family attached units and the remaining 1,995, 34%, were for apartments units (rental and condo).

Table 9
Recorded Residential Subdivisions, 10/01/09 to 12/31/14

Year	Units	Plans	Acreage
10/09 to 12/10 *	979	126	1,793
1/11 to 12/11	656	88	2,347
1/12 to 12/12	1,742	91	1,334
1/13 to 12/13	921	96	2,558
1/14 to 12/14	1,629	122	2,517
TOTAL	5,927	523	10,549
ANNUAL AVG.	1,129	100	2,009

* Extra quarter included due to change in analysis timeframe

Table 10
Unit Potential From Recorded Lots by Unit Type, 10/01/09 to 12/31/14

Year	SFD	SFA	APT	MH	Total
10/09 to 12/10 *	362	400	217	0	979
1/11 to 12/11	319	337	0	0	656
1/12 to 12/12	330	451	961	0	1,742
1/13 to 12/13	324	235	362	0	921
1/14 to 12/14	686	488	455	0	1,629
TOTAL	2,021	1,911	1,995	0	5,927
PERCENT	34%	32%	34%	0%	100%
ANNUAL AVG.	385	364	380	0	1,129

* Extra quarter included due to change in analysis timeframe

In-Process Residential Subdivisions

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

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

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in several stages (environmental concept, sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of December 31, 2014 are tabulated and compared with those in process the prior year (as of December 31, 2013).

Number of Plans

There were less residential plans in process as of December 31, 2014 than there were one year earlier – 165 plans in 2014 compared to 182 in 2013 (Table 11).

For the current year, Ellicott City had the greatest number of residential plans in process with 48, followed by ElkrIDGE with 38, the Rural West with 36, the Southeast with 26, Columbia with 8 and Downtown Columbia with 1.

Of the 165 plans in process on December 31, 2014, 93 were final plans, 35 were environmental concept plans, 17 were sketch plans, 18 were preliminary equivalent sketch plans and 2 were preliminary plans.

Number of Potential Units

There were 1,599 more units in process on December 31, 2014 compared to the previous year – 9,339 units compared to 7,740 units (Table 12).

It is important to note that a significant number of the 9,339 units in process are part of phased projects with building planned for future years.

Table 11
Number of Residential Subdivision Plans in Process, 12/31/14
 (With comparisons to Countywide total as of 12/31/13)

Planning Area	Environmental		Preliminary Equivalent		Final	TOTAL PLANS
	Concept	Sketch	Sketch	Preliminary		
Downtown Columbia	0	0	0	0	1	1
All Other Columbia	5	0	3	0	8	16
ElkrIDGE	10	8	2	1	17	38
Ellicott City	9	7	5	0	27	48
Rural West	6	0	4	0	26	36
Southeast	5	2	4	1	14	26
TOTAL	35	17	18	2	93	165
As of 12/31/13	30	17	13	4	118	182

Phasing is often a developer's preference, but also results from APFO regulations that limit the number of allocations available each year. As shown in Table 13, 8,145 units are part of phased plans, with building planned as far out as 2025. Phased plans represent 87% of the total units in process.

The larger phased projects include Laurel Park Station and Maple Lawn in the Southeast; The Overlook at Blue Stream, Howard Square, Oxford Square, ElkrIDGE Crossing, Morris Place, and the Park at Locust Thicket in ElkrIDGE; Turf Valley and Westmount in Ellicott City; the Enclave at Tierney in Columbia; The Crescent Property in Downtown Columbia; and Walnut Creek in the Rural West.

As reflected in Table 12, 18% of the units in process are single family detached units. About 15% are single family attached units and 67% are apartment units (condo or rental). Table 14 shows details by plan stage and unit type for this year by planning area. Chart 7 graphically illustrates the units in process by unit type for each planning area.

Table 12
Number of Potential Units from Subdivision Plans in Process, 12/31/14
 (With comparisons to Countywide total as of 12/31/13)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	2,300	0	2,300
All Other Columbia	181	0	0	0	181
Elkridge	93	627	2,714	0	3,434
Ellicott City	855	676	246	0	1,777
Rural West	347	0	0	0	347
Southeast	203	64	1,033	0	1,300
TOTAL	1,679	1,367	6,293	0	9,339
PERCENT	18%	15%	67%	0%	100%
As of 12/31/13	1,554	1,706	4,480	0	7,740

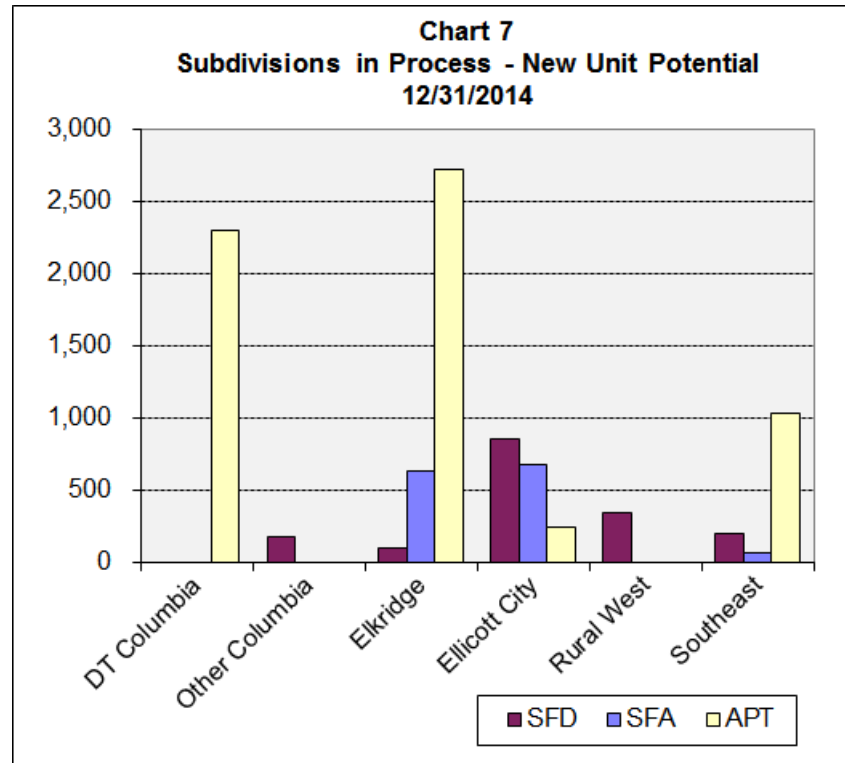


Table 13
Potential Units from Phased Projects in Process, 12/31/14

Planning Area	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	TOTAL
Downtown Columbia	0	0	0	300	300	300	300	300	300	300	200	2,300
All Other Columbia	0	74	74	0	0	0	0	0	0	0	0	148
Elkridge	0	497	635	752	607	456	314	0	0	0	0	3,261
Ellicott City	0	125	175	207	225	241	143	141	0	0	0	1,257
Southeast	0	30	274	250	250	250	0	0	0	0	32	1,086
Rural West	45	48	0	0	0	0	0	0	0	0	0	93
TOTAL	45	774	1,158	1,509	1,382	1,247	757	441	300	300	232	8,145

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

Table 14
Number of Potential Units from Subdivision Plans in Process by Unit Type, 12/31/14

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	164	0	0	0	164
Elkridge	19	225	2,714	0	2,958	35	0	0	0	35
Ellicott City	127	349	246	0	722	385	69	0	0	454
Rural West	0	0	0	0	0	102	0	0	0	102
Southeast	32	0	748	0	780	45	0	33	0	78
TOTAL	178	574	3,708	0	4,460	731	69	33	0	833

Planning Area	Preliminary					Final					TOTAL - 12/31/14				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	2,300	0	2,300	0	0	2,300	0	2,300
All Other Columbia	0	0	0	0	0	17	0	0	0	17	181	0	0	0	181
Elkridge	0	0	0	0	0	39	402	0	0	441	93	627	2,714	0	3,434
Ellicott City	0	0	0	0	0	343	258	0	0	601	855	676	246	0	1,777
Rural West	0	0	0	0	0	245	0	0	0	245	347	0	0	0	347
Southeast	0	0	252	0	252	126	64	0	0	190	203	64	1,033	0	1,300
TOTAL	0	0	252	0	252	770	724	2,300	0	3,794	1,679	1,367	6,293	0	9,339

Number of Acres

As of December 31, 2014 a total of 3,312 acres of residential land were in the subdivision process. This is 1,380 less acres compared to the previous year, at which time there were 4,692 acres in process (Table 15).

Major Projects

Table 16 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive and phased projects. Map 5 shows the location of these projects. Some of the larger projects in this list include The Crescent Property, Oxford Square, The Overlook at Blue Stream, Howard Square, The Park at Locust Thicket, Turf Valley, Westmount and Laurel Park Station. These major projects with 50 or more units total 8,678 units which account for about 93% of the total 9,339 units in the subdivision process.

Table 15
Acreege of Residential Subdivision Plans in Process, 12/31/14
(With comparisons to Countywide total as of 12/31/13)

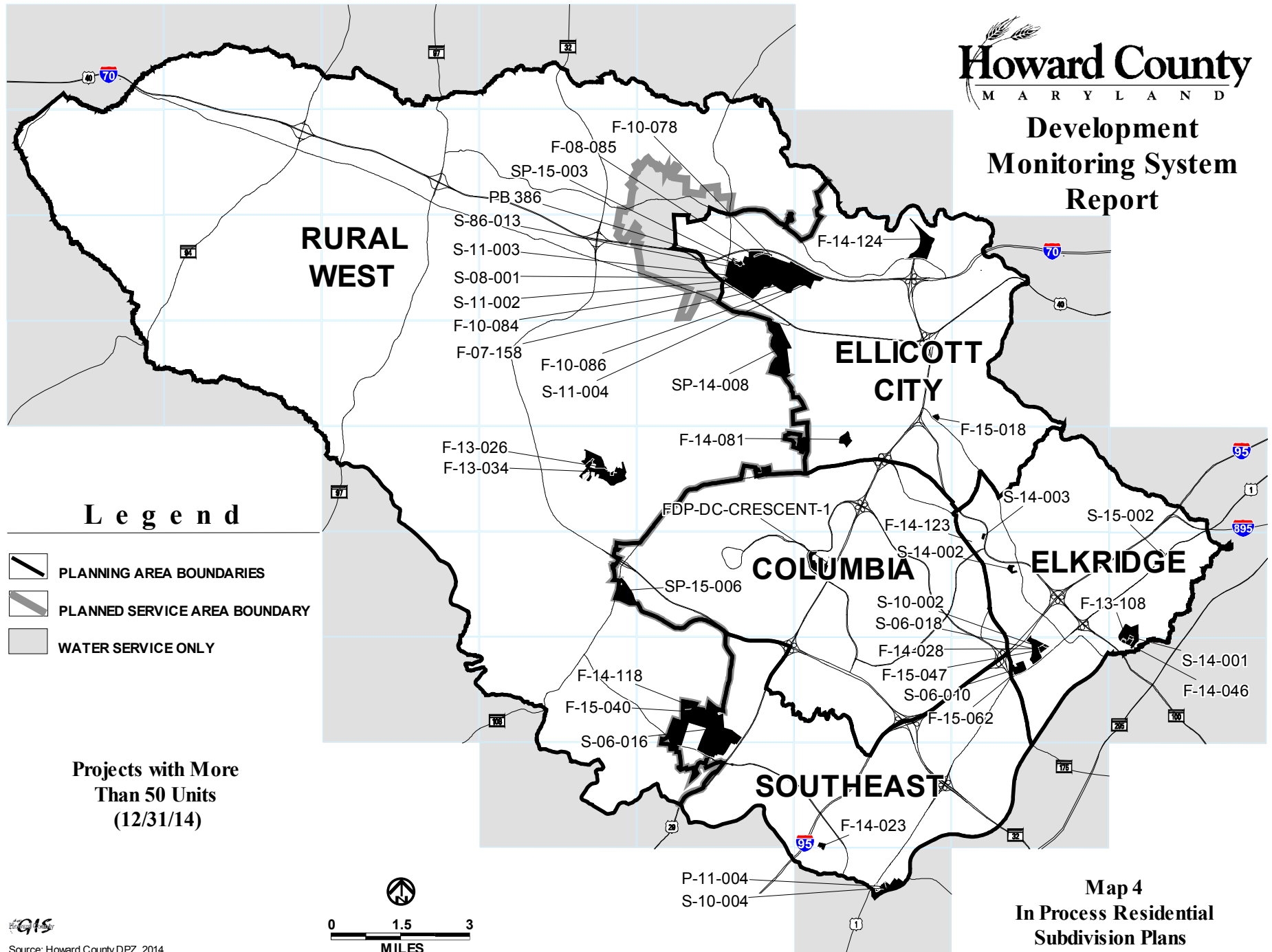
Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	69	69
All Other Columbia	0	102	0	14	117
Elkridge	344	19	76	159	597
Ellicott City	96	285	0	303	684
Rural West	0	327	0	1,312	1,639
Southeast	49	64	15	79	206
TOTAL	489	796	90	1,936	3,312
As of 12/31/13	1,185	732	190	2,585	4,692

Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/14




Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	FDP-DC-CRSCNT-1	Downtown Columbia - Crescent	APT	2,300	2,300
All Other Columbia	SP-15-006	Enclave at Tierney Farm	SFD	148	148
Elkridge	S-14-001, F-13-108, F-14-046	Oxford Square - Remaining Phases	APT - 173 MIHU	1,143	3,341
	S-06-018	The Overlook at Blue Stream - Remaining Phases	SFA, APT - 178 MIHU	966	
	S-06-010, F-15-062	Howard Square - Remaining Phases	SFA, APT - 71 MIHU	390	
	S-14-002	The Park at Locust Thicket	APT - 50 MIHU	387	
	S-15-002	Elkridge Crossing - Remaining Phases	SFA, APT	211	
	S-10-002, F-14-028, F-15-047	Morris Place	SFA - 25 MIHU	166	
	F-14-123, S-14-003	ShIPLEY'S Grant - Remaining Phases	SFA - 7 MIHU	78	
Ellicott City	S-86-013, PB 386	Turf Valley - Remaining Phases	SFD, SFA, APT	335	1,635
	SP-14-008	Westmount	SFD	325	
	F-14-124	The Estates at Patapsco Park	SFD	195	
	F-08-85, -86/F-10-078/SP-15-003	Villages at Turf Valley	SFD, SFA	166	
	S-08-001	Turf Valley Clubhouse	SFD, SFA, APT	128	
	S-11-002	The Bluffs at Turf Valley	APT	114	
	F-10-084/F-10-086/F-07-158	Fairways at Turf Valley	SFD, SFA	98	
	F-15-018	Long Gate Overlook	SFA	79	
	S-11-004	Turf Valley - Pod E	SFD, SFA	74	
	F-14-081	Centennial Lake Overlook, Sec. 2	SFD	68	
	S-11-003	Turf Valley Clubhouse II	SFD, SFA	53	
Rural West	F-13-026/F-13-034	Walnut Creek - Phases 3 & 4	SFD	93	93
Southeast	S-10-004/P-11-004	Laurel Park Station - All Phases	APT - 150 MIHU	1,000	1,161
	F-15-040/F-14-118/S-06-016	Maple Lawn Farms - Remaining Phases	SFD	86	
	F-14-023	Deer Springs, Sec. 2	SFD, SFA	75	
TOTAL					8,678



Development Monitoring System Report



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

Projects with More Than 50 Units (12/31/14)



Map 4
In Process Residential Subdivision Plans



Source: Howard County DPZ, 2014.

Approved Residential Site Development Plans

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

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

Summary of Latest Reporting Period

From 01/01/2014 thru 12/31/2014 there were 1,883 housing units approved in 71 site development plans totaling about 278 acres (Table 17). The Southeast had 837 approved units followed by Elkridge with 652 units, Ellicott City with 382, and Columbia with 12.

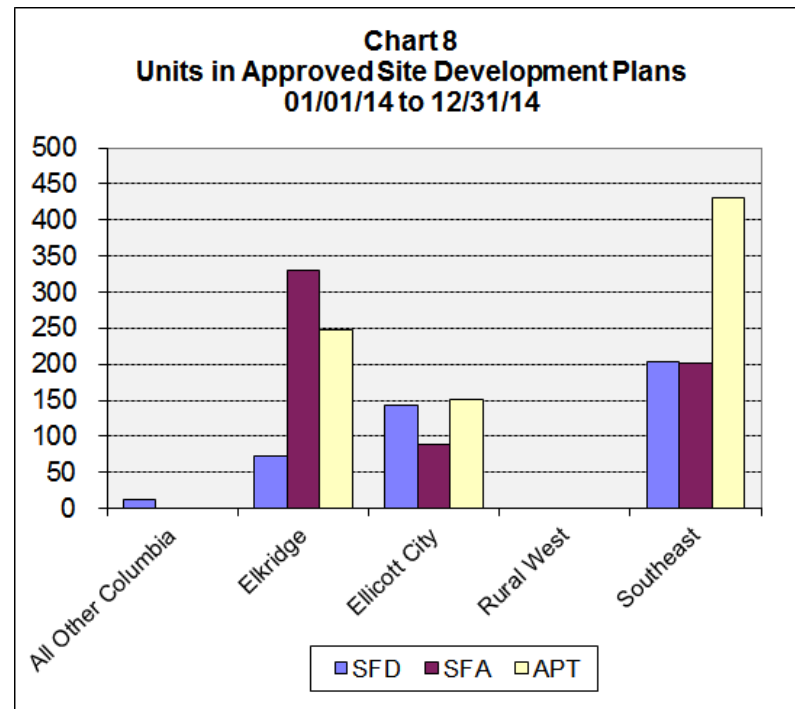
Table 18 shows new units from approved site development plans by unit type. Of the 1,883 approved units, 23% were for single family detached units, 33% were for single family attached or townhouse units and 44% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 17
Approved Residential Site Development Plans, 1/01/14 to 12/31/14

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	12	1%	6	8%	9	3%
Elkridge	652	35%	22	31%	78	28%
Ellicott City	382	20%	16	23%	36	13%
Rural West	0	0%	1	1%	31	11%
Southeast	837	44%	26	37%	124	44%
TOTAL	1,883	100%	71	100%	278	100%

Table 18
Approved Units from SDP's by Unit Type, 1/01/14 to 12/31/14

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	12	0	0	0	12	1%
Elkridge	73	331	248	0	652	35%
Ellicott City	143	88	151	0	382	20%
Rural West	0	0	0	0	0	0%
Southeast	204	202	431	0	837	44%
TOTAL	432	621	830	0	1,883	100%
PERCENT	23%	33%	44%	0%	100%	



Last Year's Projects - Greater than 30 Units

Of the total 1,883 units approved in site development plans last year, 1,572 or about 83% were in part of projects consisting of more than 30 units. These larger projects, shown in Table 19, are located in three planning areas. The location of these plans are shown on Map 6.

Five Year Results

Tables 20 and 21 show the approved residential site development plans from October 1, 2009 to December 31, 2014. Over this five and a quarter year period 7,748 units were approved countywide in 296 site development plans totaling about 1,495 acres.

Table 19
Approved Residential SDP's, Projects With More Than 30 Units, 1/01/14 to 12/31/14

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	SDP-14-027	Oxford Square - Parcel K	APT - 38 MIHU	248	579
	SDP-13-068	Oxford Square	SFA - 13 MIHU	101	
	SDP-14-043	Howard Square	SFA - 24 MIHU	101	
	SDP-08-109	Riverwatch	SFA - 42 MIHU	84	
	SDP-13-085	Enclave at Park Forest	SFA - 5 MIHU	45	
Ellicott City	SDP-13-031	Waverly Mews	Age-Restricted APT - 12 MIHU	112	312
	SDP-09-039	Waverly Woods - Courtyards West - Ph. 5	SFD, SFA - Age Restricted	90	
	SDP-13-054	Towns at Patuxent Orchard	SFA - 7 MIHU	71	
	SDP-13-055	Orchard Park, Sec. 3	APT - 4 MIHU	39	
Southeast	SDP-13-048	Annapolis Junction Town Center	APT - 32 MIHU	416	681
	SDP-13-023	Walden Woods	SFD, SFA - Age Restricted	97	
	SDP-14-056	Wincopia Farms	SFD	56	
	SDP-14-083	Wincopia Farms	SFD	42	
	SDP-14-048	Maple Lawn Farms	SFA	35	
	SDP-14-076	Maple Lawn Farms	SFA	35	
TOTAL					1,572

Table 20
Approved Units in Residential Site Development Plans, 10/01/09 to 12/31/14

Year	SFD	SFA	APT	MH	Total
10/09 to 12/10 *	413	572	324	0	1,309
1/11 to 12/11	279	322	222	0	823
1/12 to 12/12	342	584	741	0	1,667
1/13 to 12/13	352	322	1,392	0	2,066
1/14 to 12/14	432	621	830	0	1,883
TOTAL	1,818	2,421	3,509	0	7,748
PERCENT	23%	31%	45%	0%	100%
ANNUAL AVG.	346	461	668	0	1,476

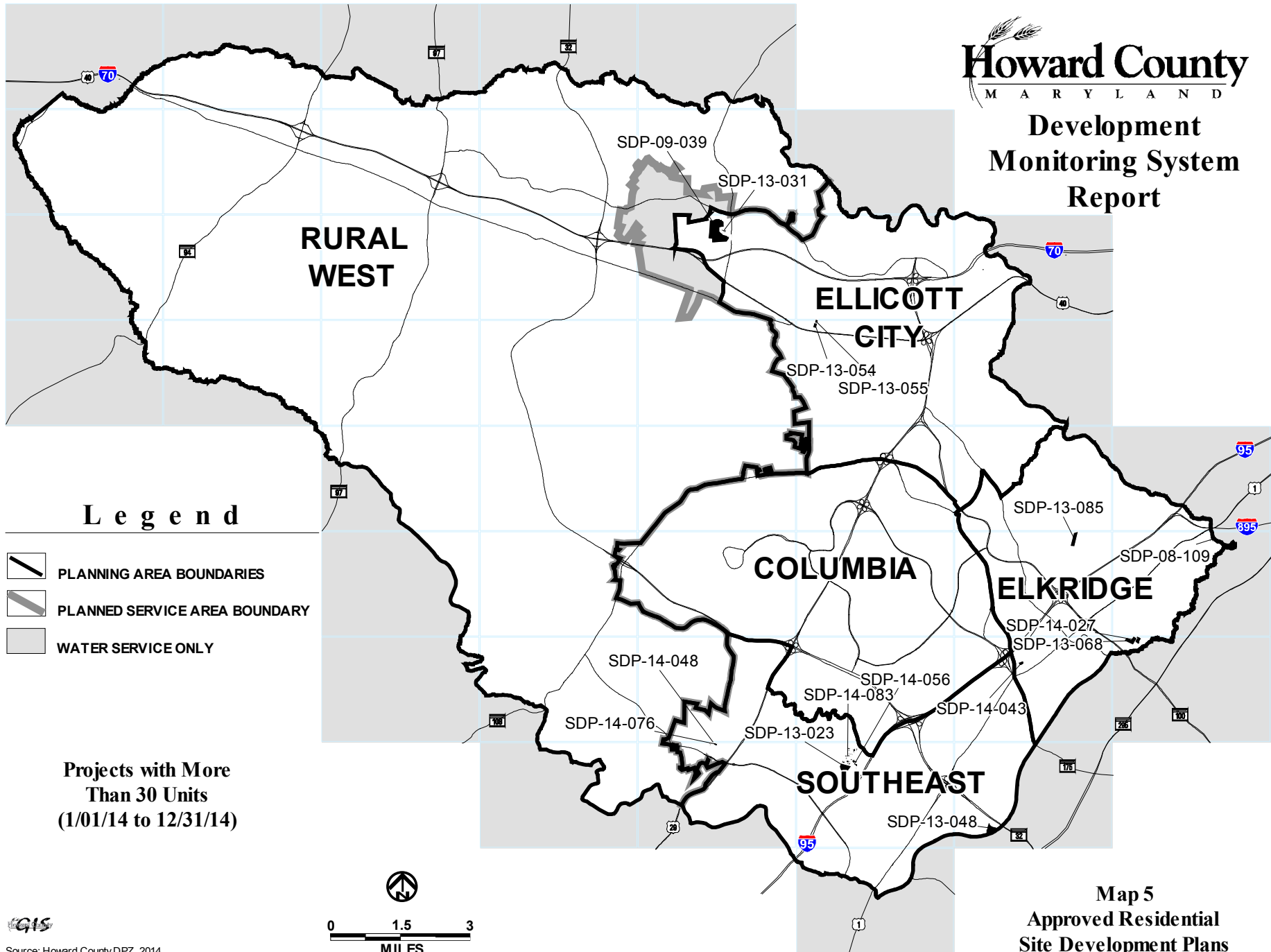
* Extra quarter included due to change in analysis timeframe

Table 21
Approved Residential Site Development Plans, 10/01/09 to 12/31/14




Year	Units	Plans	Acreage
10/09 to 12/10 *	1,309	72	433
1/11 to 12/11	823	42	175
1/12 to 12/12	1,667	55	312
1/13 to 12/13	2,066	56	297
1/14 to 13/14	1,883	71	278
TOTAL	7,748	296	1,495
ANNUAL AVG.	1,476	56	285

* Extra quarter included due to change in analysis timeframe

**Development
Monitoring System
Report**



Legend

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

**Projects with More
Than 30 Units
(1/01/14 to 12/31/14)**



Source: Howard County DPZ, 2014.

**Map 5
Approved Residential
Site Development Plans**

In-Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of plans, potential units and acreage currently being processed as of December 31, 2014 are tabulated and compared to those in process a year earlier (as of December 31, 2013). 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 26 less residential site development plans in process as of December 31, 2014 compared to the prior reporting period, 33 plans compared to 59 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 1/1/13 & 12/31/14

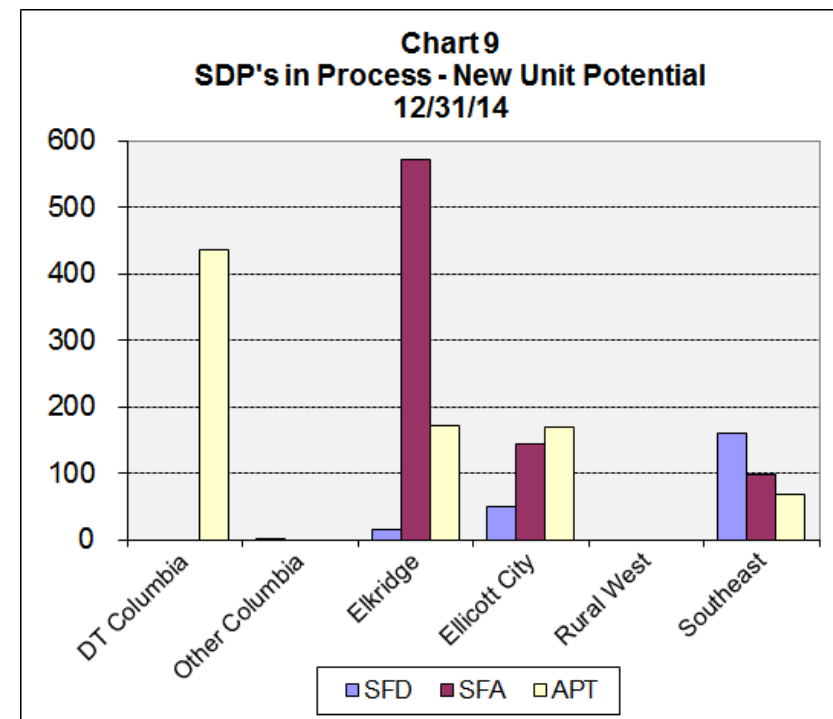
Planning Area	2014	2013
Downtown Columbia	1	1
All Other Columbia	1	4
Elkridge	15	22
Ellicott City	8	17
Rural West	0	2
Southeast	8	13
TOTAL	33	59

Number of Potential Units

There were 481 less units in process as of December 31, 2014 compared to December 31 of the previous year, 1,882 units compared to 2,363 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 844 proposed units in 2014. This is followed by 811 proposed single family attached or townhouse units and 227 single family detached units. Chart 9 graphically illustrates the units in process by unit type for the current year by planning area.

Table 23
Number of Potential Units from Site Development Plans in Process, 12/31/14
(With comparisons to Countywide total as of 12/31/13)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	437	0	437
All Other Columbia	1	0	0	0	1
Elkridge	16	571	171	0	758
Ellicott City	50	143	169	0	362
Rural West	0	0	0	0	0
Southeast	160	97	67	0	324
TOTAL	227	811	844	0	1,882
As of 12/31/13	226	772	1,365	0	2,363



Number of Acres

As of December 31, 2014 a total of 303 acres of residential land were in the site development plan process. This is less than the previous year when there were 381 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects containing 30 units or more. Map 7 shows the location of these projects. Of the 1,882 units in the site development plan process, 1,781 or about 95% were in projects with more than 30 units.

Some of the larger projects include the Warfield Phase 2 in Downtown Columbia, Brompton House in Blue Stream, plans in Oxford Square, the Gatherings at Ellicott's Retreat, and High Ridge Meadows.

Table 24
Acreeage of Residential SDP's In Process, 12/31/14 & 12/31/13

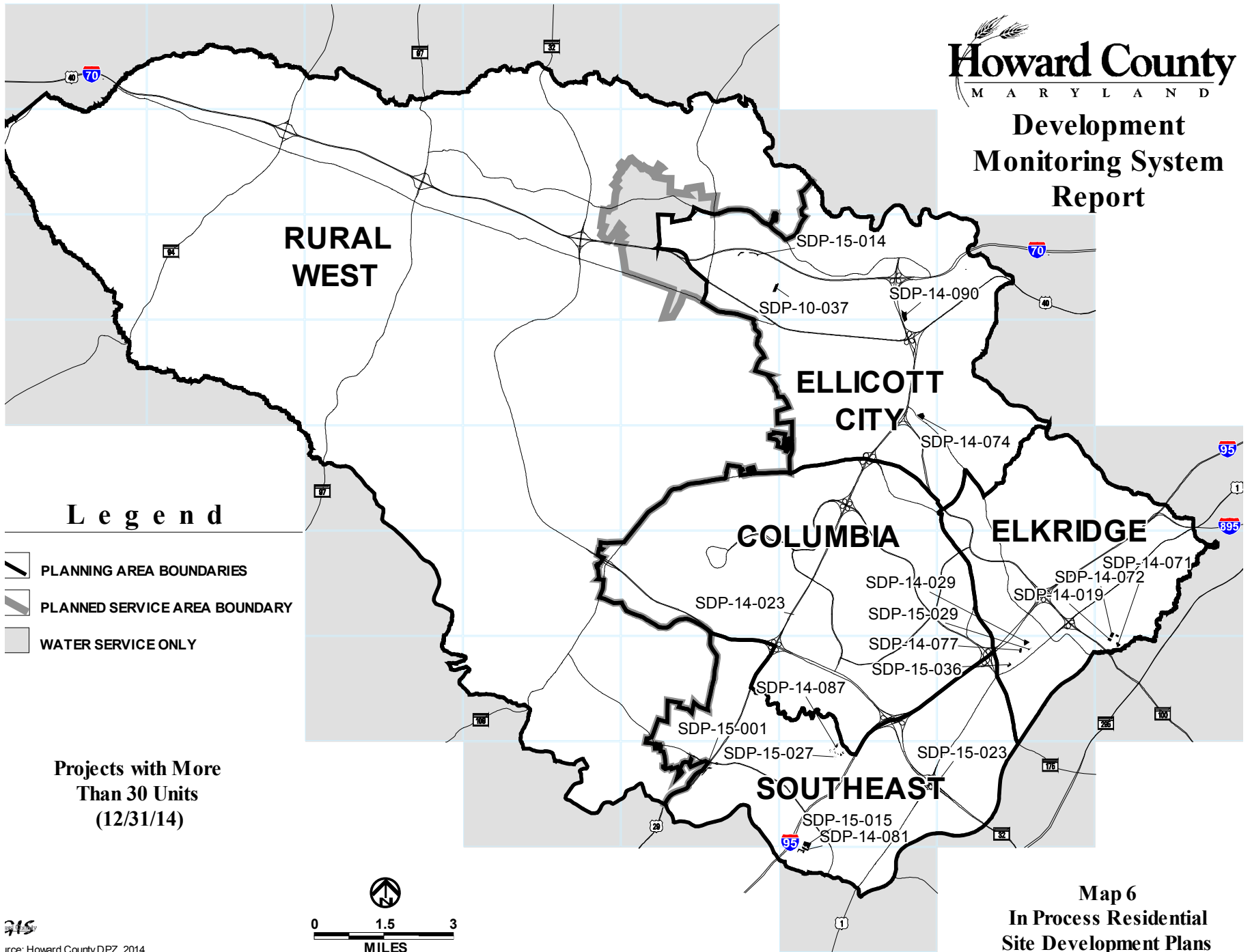
Planning Area	2014	2013
Downtown Columbia	5	5
All Other Columbia	0.5	2
Elkridge	66	119
Ellicott City	66	146
Rural West	0	37
Southeast	76	71
TOTAL	214	381

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/14

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-14-023	Warfield, Phase II	APT	437	437
Elkridge	SDP-14-077	Brompton House (Blue Stream)	SFA, APT - 36 MIHU	194	
	SDP-14-072	Oxford Square, Parcel E	SFA - 24 MIHU	156	
	SDP-14-029	Blue Stream Towns, Sec. 2	SFA - 19 MIHU	105	
	SDP-14-019	Oxford Square	SFA - 13 MIHU	96	
	SDP-15-036	Howard Square	SFA - 19 MIHU	83	
	SDP-14-071	Oxford Square	SFA - 7 MIHU	42	
	SDP-15-029	Morris Place	SFA - 5 MIHU	34	710
Ellicott City	SDP-14-090	The Gatherings at Ellicott's Retreat	APT - Age Restricted	162	
	SDP-14-074	Long Gate Overlook	SFA - 8 MIHU	73	
	SDP-15-014	Villages at Turf Valley, Ph. 2, Sec. 2	SFD	48	
	SDP-10-037	Fairways at Turf Valley	SFA	47	330
Southeast	SDP-15-015	High Ridge Meadows (Deer Springs)	SFD, SFA	75	
	SDP-14-087	Wincopia Farms	SFD	59	
	SDP-14-081	Deer Springs	SFD	54	
	SDP-15-027	Wincopia Farms	SFA	49	
	SDP-15-023	Day Resource Center	APT	35	
	SDP-15-001	Cherrytree Park	APT - Age Restricted - 4 MIHU	32	304
TOTAL					1,781



Development Monitoring System Report



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- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Projects with More Than 30 Units (12/31/14)



0 1.5 3
MILES



Source: Howard County DPZ, 2014.

Map 6
In Process Residential Site Development Plans

Residential Building Permits & Use and Occupancy Permits

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

Issued Building Permits

Summary of Last Year

From January 1, 2014 to December 31, 2014, the County issued 1,453 residential building permits for new construction (Table 26). Ellicott City had the greatest number issued with 499, followed by Elkridge with 490 and then the Southeast with 205. Countywide, 35% of the permits were for apartment units (both rental and condo). About 30% were for single family detached units and 35% for single family attached units. Chart 10 shows these results graphically by planning area.

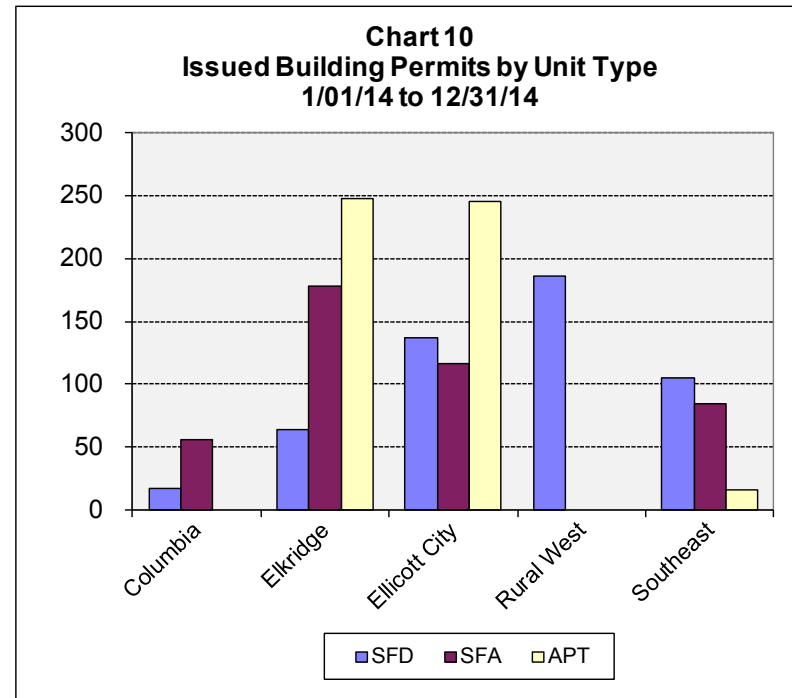


Table 26
Issued Residential Building Permits by Unit Type, 1/01/14 to 12/31/14

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	17	56	0	0	73	5%
Elkridge	64	178	248	0	490	34%
Ellicott City	137	117	245	0	499	34%
Rural West	186	0	0	0	186	13%
Southeast	105	84	16	0	205	14%
TOTAL	509	435	509	0	1,453	100%
PERCENT	35%	30%	35%	0%	100%	

Last Year's Projects - 25 or More Units

Table 27 summarizes the issued residential building permits in larger developments with 25 or more units. About 75%, or 1,089 of the total 1,453 permits issued last year, fall into this category. Map 8 shows the locations of each of the developments.

Five Year Results

Over five and a quarter years, from October 1, 2009 to December 31, 2014, a total of 8,437 residential permits have been issued in Howard County (Table 28). This is an average of 1,687 permits per year. Last year's 1,453 issued permits was 37% less than the 2,317 permits issued the year before and the least since 2011.

Of the 8,437 total permits issued over the 5 and a quarter year time period, 2,859, or 34%, were for single family detached units. There were 2,447 permits (29%) for single family attached units and 3,113 permits (37%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

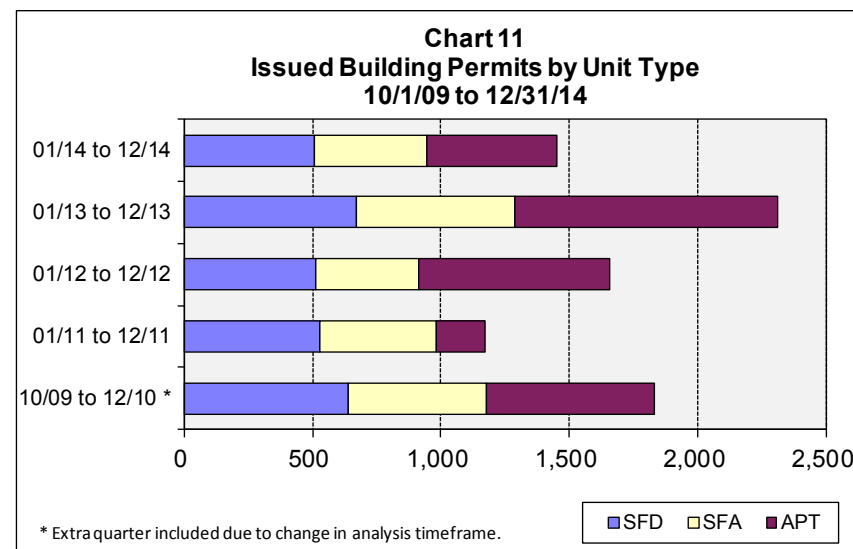
Table 27
Issued Residential Building Permits in Subdivisions with 25 or More Units, 1/01/14 to 12/31/14

Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Simpson Mill	Townhomes	56	56
Elkridge	Oxford Square	Townhomes/Apartments	292	415
	Shipley's Grant	Townhomes	62	
	Howard Square	Townhomes	61	
Ellicott City	Lutheran Village at Miller's Grant	Apartments-Age Restricted	205	441
	GTW's Waverly Woods	Single-Family Detached/Townhomes-Age Restricted	79	
	Autumn River	Single-Family Detached/Townhomes	48	
	Ellicott Crossing	Townhomes	44	
	Orchard Park Sec. 3	Apartments	40	
	Villages at Turf Valley	Single-Family Detached/Townhomes	25	
Rural West	Walnut Creek	Single-Family Detached	38	38
Southeast	Maple Lawn Farms	Single-Family Detached/Townhomes	139	139
TOTAL				1,089

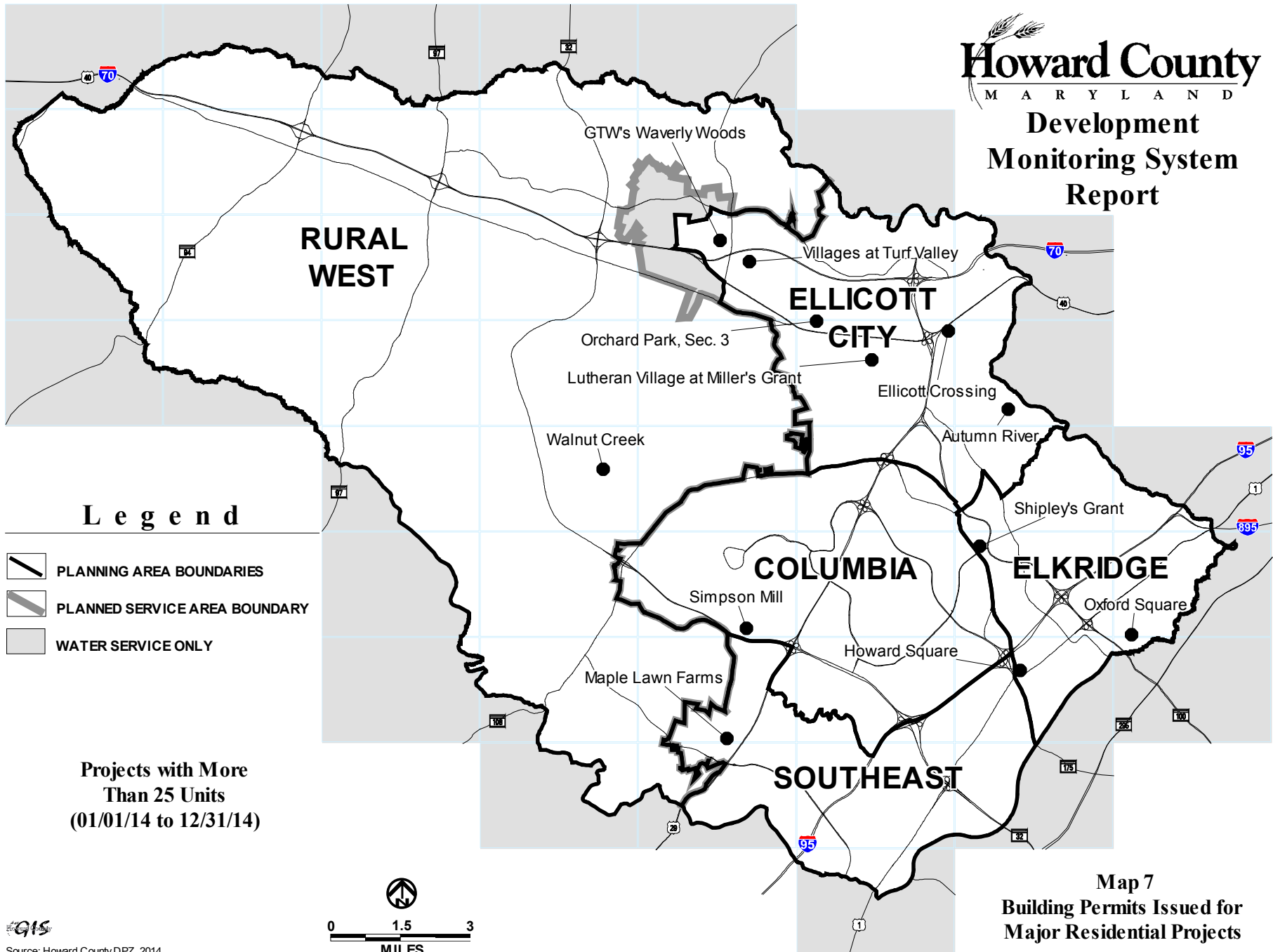
Table 28
Issued Residential Building Permits by Unit Type, 10/01/09 to 12/31/14

Year	SFD	SFA	APT	MH	Total
10/09 to 12/10 *	637	541	650	5	1,833
01/11 to 12/11	528	456	186	2	1,172
01/12 to 12/12	514	401	744	3	1,662
01/13 to 12/13	671	614	1,024	8	2,317
01/14 to 12/14	509	435	509	0	1,453
TOTAL	2,859	2,447	3,113	18	8,437
PERCENT	34%	29%	37%	0.2%	100%
ANNUAL AVG.	545	466	593	3	1,687

* Extra quarter included due to change in analysis timeframe



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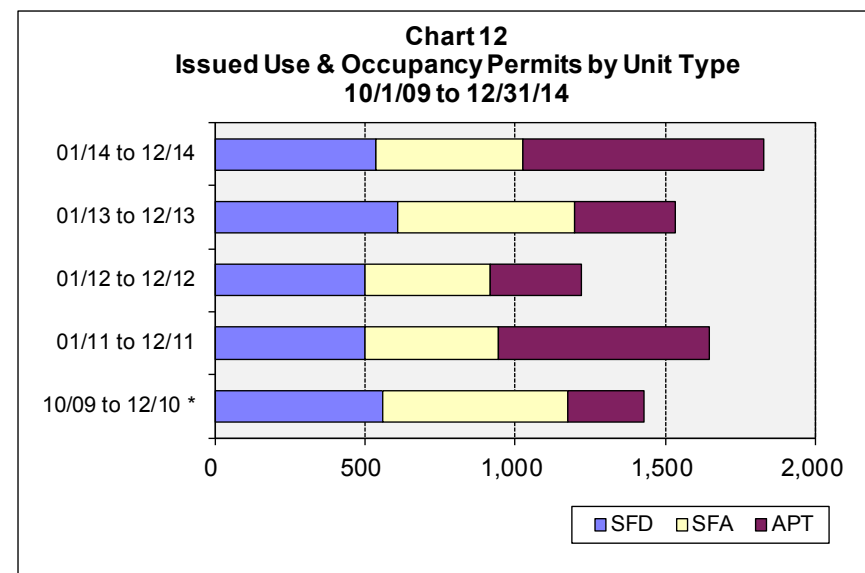
Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2014 to December 31, 2014, the County issued 1,829 use and occupancy permits (Table 29). Of all planning areas, Elkridge had the most with 615. This is followed by Columbia (not Downtown) with 427, Ellicott City with 328, the Southeast with 264 and the Rural West with 195. Countywide, 29% of the permits were for single family detached units, 27% were for single family attached units and 44% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type, 1/01/2014 to 12/31/2014

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	18	89	320	0	427	23%
Elkridge	70	185	360	0	615	34%
Ellicott City	138	100	90	0	328	18%
Rural West	195	0	0	0	195	11%
Southeast	115	117	32	0	264	14%
TOTAL	536	491	802	0	1,829	100%
PERCENT	29%	27%	44%	0%		



Five Year Results

From October 1, 2009 to December 31, 2014, a total of 7,658 use and occupancy permits have been issued in Howard County (Table 30). This is an annual average of 1,459 permits per year.

Of the 7,658 total use and occupancy permits issued over the five and a quarter year timeframe, 35% were for single family detached units, 33% for single family attached units, and 31% for apartment units. There were 19% more units built last year compared to the year before, 1,829 completions in 2014 compared to 1,535 in 2013, and the most built over the 5 year analysis time period and, in fact, the most since 2005/06 when there were 1,877 completions. Chart 12 shows the results by unit type graphically over time.

Table 30
Issued Use and Occupancy Permits by Unit Type, 10/09 to 12/14

Year	SFD	SFA	APT	MH	Total
10/09 to 12/10 *	558	616	253	0	1,427
01/11 to 12/11	501	441	705	0	1,647
01/12 to 12/12	502	416	302	0	1,220
01/13 to 12/13	608	591	336	0	1,535
01/14 to 12/14	536	491	802	0	1,829
TOTAL	2,705	2,555	2,398	0	7,658
PERCENT	35%	33%	31%	0%	100%
ANNUAL AVG.	515	487	457	0	1,459

* Extra quarter included due to change in analysis timeframe.

Age-Restricted and Moderate Income Housing Units

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

Age-restricted housing can be built as a conditional use in residential zoning districts as well as by-right in the Planned Office Research (POR), Planned Senior Community (PSC), Community Center Transition (CCT) and Residential: Senior-Institutional (RSI) districts.

The 2004 comprehensive rezoning expanded the MIHU regulations to include more zoning districts. New projects in higher density and mixed-use zones as well as all age-restricted projects must build a certain percentage of affordable units, anywhere from 5% to 15%, depending on particular criteria such as the zone, unit type and density.

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

The following summarizes recent development activity of age-restricted and MIHU units from January 1, 2014 to December 31, 2014, as well as some comparisons to the previous year reporting period.

In-Process Plans

Table 31 shows the age-restricted units from in-process plans by unit type and by planning area as of December 31, 2014. This includes both subdivision and site development plans. There were 194 units in process, most of which are in Ellicott City and a smaller amount in the Southeast. The timing of actual development will be paced by APFO.

All 194 of these units are apartments (including rental and condo). Map 9 shows location and names of the particular projects. Table 37 shows the details of each of these projects.

Compared to last year, there are less age-restricted units in process in this current reporting period, 194 units versus 360 units, respectively.

Table 31
Age Restricted Units from Plans in Process, 12/31/2014
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	162	162	84%
Rural West	0	0	0	0	0%
Southeast	0	0	32	32	16%
TOTAL	0	0	194	194	100%
PERCENT	0%	0%	100%	100%	

As of 12/31/13	94	138	128	360	
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Table 32 shows the total MIHU units in process. These total 728, the majority of which are in Elkridge. This is less than the number in process the previous year which had 779.

Table 32
MIHU Units from Plans in Process, 12/31/2014
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	142	421	563	77%
Ellicott City	3	8	0	11	2%
Rural West	0	0	0	0	0%
Southeast	0	0	154	154	21%
TOTAL	3	150	575	728	100%
PERCENT	0%	21%	79%	100%	

As of 12/31/13	0	132	647	779	
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Table 33 shows just the age-restricted MIHU units in process, 4 of the 728 MIHU unit total. The remaining 724 are MIHU units that are not age-restricted. There were 27 age-restricted MIHU units in process for the previous reporting period.

Map 10 shows the particular projects that include MIHU units. Table 37 shows the details of each of these projects.

Table 33
Age-Res. MIHU Units from Plans in Process, 12/31/2014
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	4	4	100%
TOTAL	0	0	4	4	100%
PERCENT	0%	0%	100%	100%	

As of 12/31/13	0	15	12	27	
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Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2014 and December 31, 2014. There were a total of 359 units approved. This is less than the 431 units approved during the previous reporting period. The 359 units include 127 apartment units (35%), 138 single family attached units (38%) and 94 single family detached units (26%). Map 9 shows the approved age-restricted projects during this time period. Table 38 shows the details for each of the plans (including MIHU's).

Table 35 shows the MIHU units in approved site development plans. A total of 177 units were approved—122 in Elkridge, 23 in Ellicott City and 32 in the Southeast. Seventeen of these units were age-restricted—shown in Table 36. Map 10 shows the approved projects with MIHU units and Table 38 shows the plan details.

Table 34
Age Restricted Units from Approved Plans, 1/01/2014 to 12/31/2014
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	45	0	45	13%
Ellicott City	84	6	112	202	56%
Rural West	0	0	0	0	0%
Southeast	10	87	15	112	31%
TOTAL	94	138	127	359	100%
PERCENT	26%	38%	35%	100%	

1/01/2013 to 12/31/2013	36	46	349	431	
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Table 35
MIHU Units from Approved Plans, 1/01/14 to 12/31/14
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	84	38	122	69%
Ellicott City	0	7	16	23	13%
Rural West	0	0	0	0	0%
Southeast	0	0	32	32	18%
TOTAL	0	91	86	177	100%
PERCENT	0%	51%	49%	100%	

1/01/2013 to 12/31/2013	0	20	42	62	
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Table 36
Age-Res. MIHU Units from Approved Plans, 1/01/14 to 12/31/14
(with comparisons to the previous reporting period)

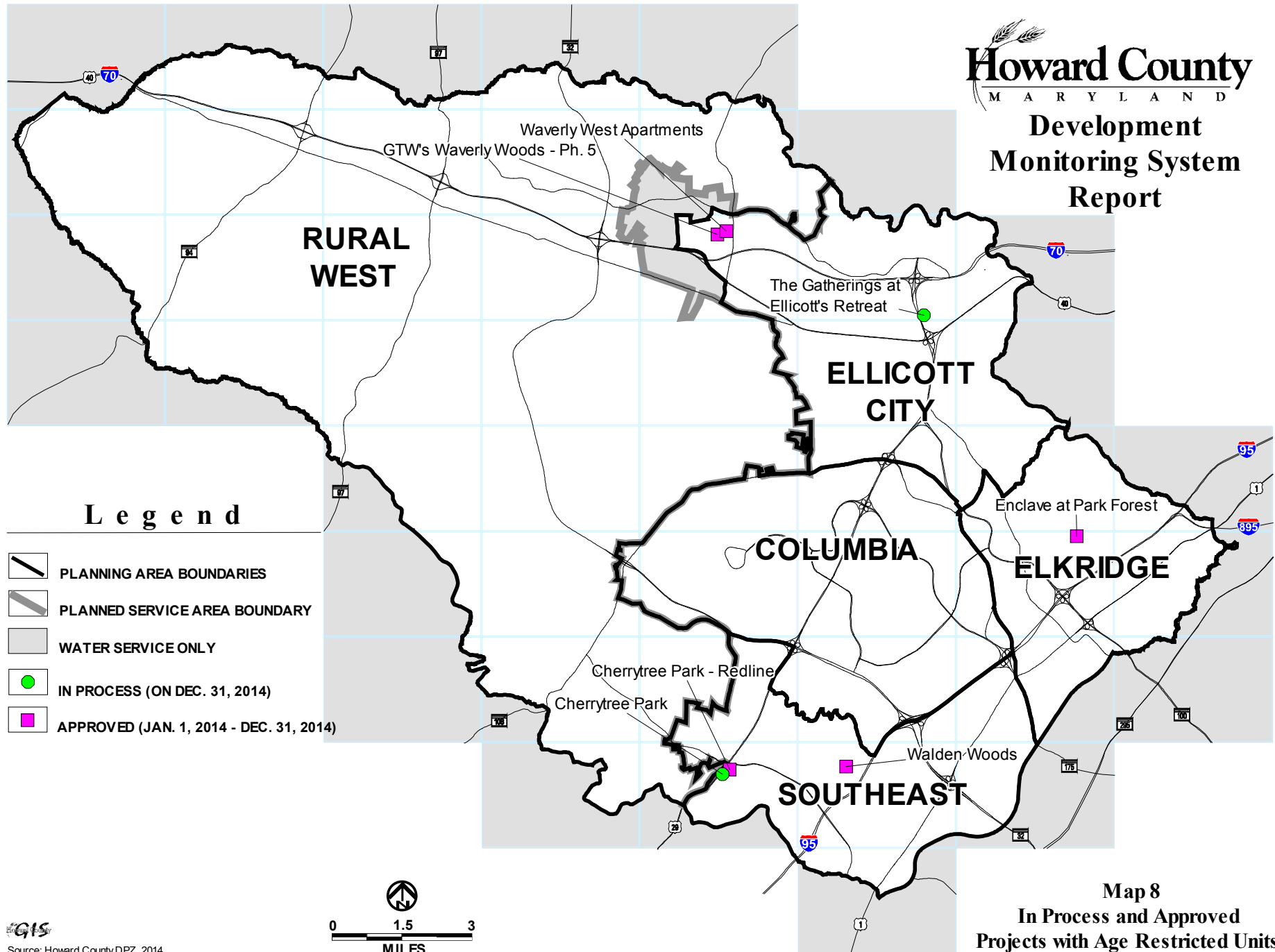
Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	5	0	5	0%
Ellicott City	0	0	12	12	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	5	12	17	0%
PERCENT	0%	0%	0%	0%	

1/01/2013 to 12/31/2013	0	0	42	42	
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Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2014

Plan Name	File Number	Zoning	MIHU Units												Market Rate Age Restricted Units			
			Not Age Restricted				Age Restricted				Total MIHU				Age Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
The Overlook at Bluestream - Remaining Units	S-06-018	CAC	0	25	134	159	0	0	0	0	0	25	134	159	0	0	0	0
Laurel Park Station	S-10-004	TOD	0	0	150	150	0	0	0	0	0	0	150	150	0	0	0	0
Oxford Square - Remaining Units	S-15-001	TOD	0	0	129	129	0	0	0	0	0	0	129	129	0	0	0	0
Howard Square - Remaining Units	S-06-010	CAC	0	0	71	71	0	0	0	0	0	0	71	71	0	0	0	0
The Park at Locust Thicket	S-14-002	R-A-15, POR	0	0	50	50	0	0	0	0	0	0	50	50	0	0	0	0
Brompton House (Bluestream)	SDP-14-077	CAC	0	0	36	36	0	0	0	0	0	0	36	36	0	0	0	0
Oxford Square - Parcel E	SDP-14-072	TOD	0	24	0	24	0	0	0	0	0	24	0	24	0	0	0	0
Bluestream Towns - Section 2	SDP-14-029	CAC	0	19	0	19	0	0	0	0	0	19	0	19	0	0	0	0
Howard Square	SDP-15-036	CAC	0	19	0	19	0	0	0	0	0	19	0	19	0	0	0	0
Morris Place - Remaining Units	S-10-002	CAC	0	17	0	17	0	0	0	0	0	17	0	17	0	0	0	0
Oxford Square	SDP-14-019	TOD	0	13	0	13	0	0	0	0	0	13	0	13	0	0	0	0
Long Gate Overlook	SDP-14-074	R-A-15	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Shipley's Grant	S-14-003	R-A-15	0	7	0	7	0	0	0	0	0	7	0	7	0	0	0	0
Oxford Square	SDP-14-071	TOD	0	7	0	7	0	0	0	0	0	7	0	7	0	0	0	0
Morris Place	SDP-15-029	CAC	0	5	0	5	0	0	0	0	0	5	0	5	0	0	0	0
Cherrytree Park	SDP-15-001	POR-MXD-6	0	0	0	0	0	0	4	4	0	0	4	4	0	0	28	28
Morris Place	F-14-028	CAC	0	3	0	3	0	0	0	0	0	3	0	3	0	0	0	0
St. Charles Woods	SP-15-010	R-ED	3	0	0	3	0	0	0	0	3	0	0	3	0	0	0	0
Buch Property	SDP-12-001	CAC	0	2	1	3	0	0	0	0	0	2	1	3	0	0	0	0
Shipley's Grant - Ph. 7	SDP-14-063	R-A-15	0	1	0	1	0	0	0	0	0	1	0	1	0	0	0	0
The Gatherings at Ellicott's Retreat	SDP-14-090	POR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	162	162
TOTAL			3	150	571	724	0	0	4	4	3	150	575	728	0	0	190	190

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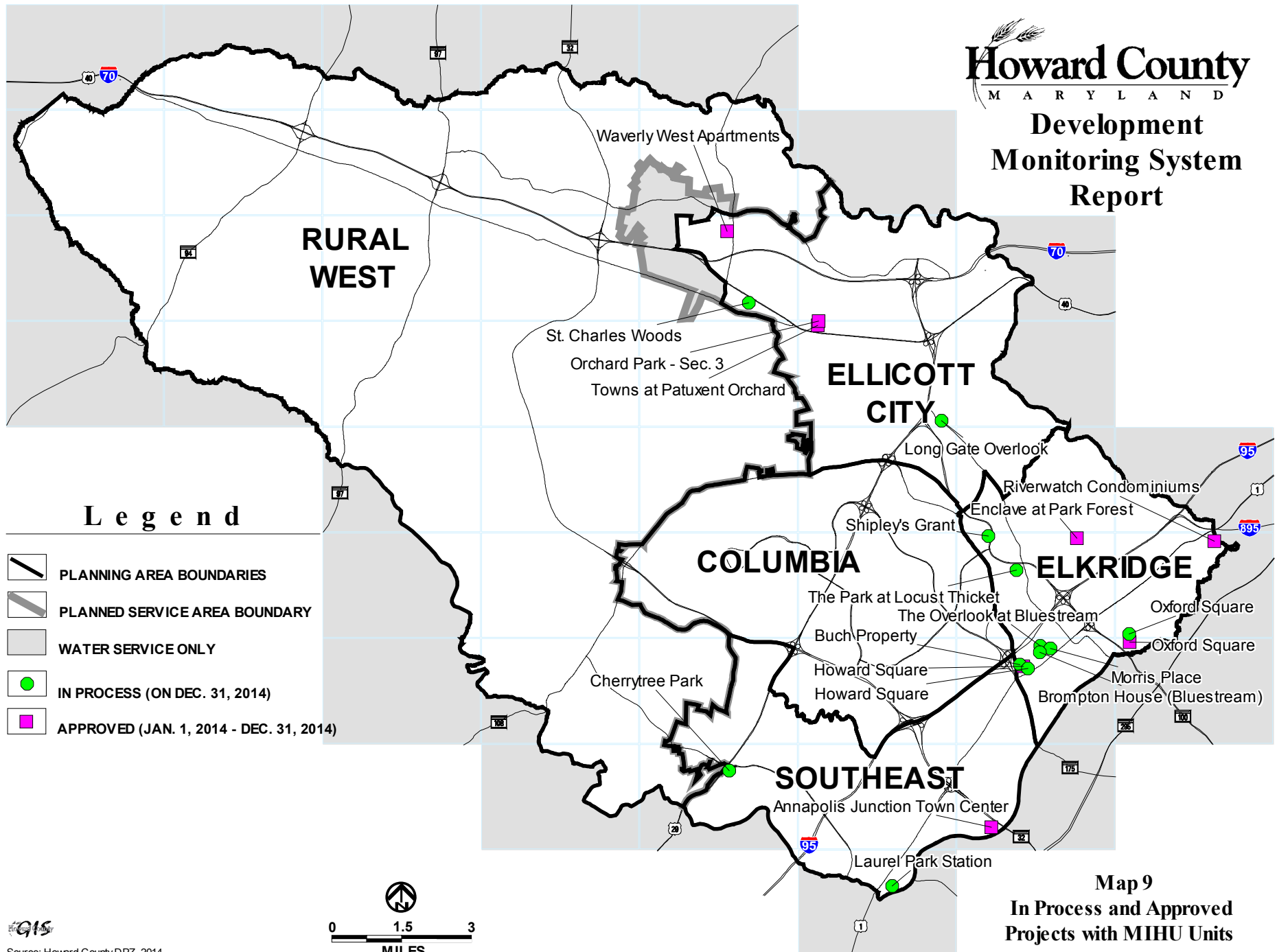
GIS
 Source: Howard County DPZ, 2014.

Map 8
**In Process and Approved
 Projects with Age Restricted Units**






Table 38
Approved SDP's with MIHU and Age Restricted Units - January 1, 2013 to December 31, 2014

Plan Name	File Number	Zoning	MIHU Units											Market Rate Age Restricted Units					
			Not Age Restricted				Age Restricted				Total MIHU			SFD	SFA	APT	Total		
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT					Total	
Riverwatch Condominiums	SDP-08-109	CAC	0	42	0	42	0	0	0	0	0	42	0	0	0	0	0	0	0
Oxford Square - Parcel K	SDP-14-027	TOD	0	0	38	38	0	0	0	0	0	0	0	0	38	38	0	0	0
Annapolis Junction Town Center	SDP-13-048	TOD	0	0	32	32	0	0	0	0	0	0	0	0	32	32	0	0	0
Howard Square	SDP-14-043	CAC	0	24	0	24	0	0	0	0	0	24	0	24	24	0	0	0	0
Oxford Square	SDP-13-068	TOD	0	13	0	13	0	0	0	0	0	13	0	13	13	0	0	0	0
Waverly West Apartments	SDP-13-031	PSC	0	0	0	0	0	0	12	12	0	0	12	12	0	0	100	100	0
Towns at Patuxent Orchard	SDP-13-054	R-A-15	0	7	0	7	0	0	0	0	0	7	0	7	7	0	0	0	0
Enclave at Park Forest	SDP-13-085	R-20	0	0	0	0	0	5	0	5	0	5	0	5	5	0	40	0	40
Orchard Park - Section 3	SDP-13-055	R-A-15	0	0	4	4	0	0	0	0	0	4	0	4	4	0	0	0	0
GTW's Waverly Woods - Ph. 5	SDP-09-039	PSC	0	0	0	0	0	0	0	0	0	0	0	0	0	84	6	0	90
Cherrytree Park - Redline	SDP-08-057	POR-MXD-6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	15	15
Walden Woods	SDP-13-023	PSC	0	0	0	0	0	0	0	0	0	0	0	0	10	87	0	97	97
TOTAL			0	86	74	160	0	5	12	17	0	91	86	177	94	133	115	342	342

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Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON DEC. 31, 2014)
-  APPROVED (JAN. 1, 2014 - DEC. 31, 2014)



Map 9
**In Process and Approved
 Projects with MIHU Units**

GIS
 Source: Howard County DPZ, 2014.

Use & Occupancy Permits

Table 39 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2014 and December 31, 2014 210 age-restricted units were built, 11% of the total 1,829 housing units built in the County over this latest reporting period.

There were 89 more age-restricted units built in the current reporting period compared to the previous period when there were 121 units built.

Since the 2004/2005 DMS, which was the first time age-restricted units were reported soon after recently passed regulatory changes enabling these type of units, 20% of all new homes built in Howard County have been age-restricted. This is summarized in Table 40.

Table 39
Age Restricted Units Built, 1/01/14 to 12/31/14
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	41	50	81	172	82%
Rural West	0	0	0	0	0%
Southeast	0	6	32	38	18%
TOTAL	41	56	113	210	100%
PERCENT	20%	27%	54%	100%	

1/01/13 to 12/31/13	37	36	48	121	
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Table 40
Age Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/14

Planning Area	SFD	SFA	APT	TOTAL	Total All Units Built	Age-Restricted % of Total
10/04 to 9/05	22	171	291	484	1,650	29%
10/05 to 9/06	35	233	369	637	1,877	34%
10/06 to 9/07	10	168	196	374	1,202	31%
10/07 to 9/08	7	105	130	242	1,602	15%
10/08 to 9/09	0	75	171	246	1,132	22%
10/09 to 12/10 *	0	132	118	250	1,427	18%
01/11 to 12/11	6	46	182	234	1,647	14%
01/12 to 12/12	34	62	115	211	1,220	17%
01/13 to 12/13	37	36	48	121	1,545	8%
01/14 to 12/14	41	56	113	210	1,829	11%
TOTAL	192	1,084	1,733	3,009	15,131	20%
PERCENT	6%	36%	58%	100%		

* Extra quarter included due to change in analysis timeframe.

Land Preservation

Agricultural Land Preservation Program

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

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

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

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

Building on that success, in the spring of 2009 "Batch 14" was initiated, which attracted 13 high quality applications. All but two of the properties were over 50 acres and most were within one mile of over 1,000 acres of land already preserved. Batch 14 was a competitive application cycle,

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

Of the seven total property owners who accepted their ALPP offers, settlement occurred on four of the farms during 2010. The remaining three properties settled in 2011. At the conclusion of Batch 14, 14,631 acres had been preserved through the County purchase program.

Several changes were made to the ALPP prior to its reopening in March 2013. The law was amended to eliminate the batching process so applications are now accepted on a rolling basis. Other changes included reducing the minimum acreage requirement and adding points to the scoring system for properties containing green infrastructure. Since the program reopened, close to 40 property owners have requested scoring for their farms. Of those, eight applied to the ALPP during 2013, with one 50 acre farm going to settlement in August of that year. The other seven were in various stages of the acquisition process by the end of 2013.

During 2014 an additional six properties applied to the ALPP, and there have been five settlements on prior year applicants. In these five settlements that occurred in 2014 a total of 358 easement acres were acquired by the ALPP.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/ CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992. During the current reporting period, calendar year 2014, no properties were preserved with an agricultural easement through the development process.

As of December 31, 2014, there were 22,000 acres of permanently preserved agricultural land. This includes 15,030 acres of purchased easements through the County's program, 4,041 acres of easements purchased by the State and 2,929 preservation acres dedicated as part of the land development process (Table 41).

Table 41
Agricultural Preservation Easements, December 31, 2014

Type	Acres	Percent
County Purchased Agric. Easements	15,030	68%
State Purchased Agric. Easements	4,041	18%
Dedicated Agric. Preservation Parcels	2,929	13%
TOTAL	22,000	100%

Other Rural Easement Dedication

As previously indicated, last year no acres were preserved through the development process and enrolled in the Agricultural Land Preservation Program. The total acres of land dedicated in this manner through 2014 therefore remain at 2,929.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 214 acres of land in 21 parcels were dedicated as joint Howard County/Homeowner’s Association preservation parcels, a 29 acre parcel was dedicated as a joint Howard County/Howard County Conservancy preservation parcel and another 25 acre parcel was dedicated as a Howard County/Patuxent Conservation Corps. Inc. preservation parcel. Table 42 shows the land preservation totals from dedicated easements through then end of 2014 for all easement types.

Since 1992, preservation easements on 11,246 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 6,309 acres, are jointly held by Howard County and various homeowner’s associations. As indicated earlier, 2,929 acres are held by the Howard County Agricultural Land Preservation Program. A total of 1,094 acres are jointly held by the Howard County Conservancy and Howard County and 391 acres are jointly held by Howard County and the Patuxent Conservation Corps. The remaining acres are jointly held by Howard County and the Audubon Society and by homeowner’s associations and the Audubon Society as well as other holders.

Table 42 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 15,545 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,299 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 11,246 acres, is land

Table 42
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	312	358	
Undeveloped Lots (From Density Transfer)	129	141	
Total Undeveloped Lots	441	499	
Developed Lots (By Right)	2,054	2,291	
Developed Lots (From Density Transfer)	1,019	1,081	
Total Developed Lots	3,073	3,372	
Roadway		428	
TOTAL	3,514	4,299	27.7%

Preservation	Parcels	Acres	
Agricultural Preservation	85	2,929	
Howard County/Homeowner’s Association	596	6,309	
Howard County/The Audubon Society	3	69	
Homeowner’s Assoc./The Audubon Society	2	61	
Howard County/Howard County Conservancy	33	1,094	
Howard County/Patuxent Conservation Corps. Inc.	16	391	
Other	88	393	
Total Preservation	823	11,246	72.3%

GRAND TOTAL (Includes Res. Develop.)	4,337	15,545	100.0%
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in dedicated preservation easements. Of the 4,299 acres subdivided for residential development, about 499 acres are not yet developed (built on), 3,372 acres are developed (built on) and 428 acres are for roads.

Total Preserved Land in the Rural West

Preservation easements in the Rural West discussed above total 30,317 acres. This includes all 22,000 acres of agricultural preservation easements and 8,317 acres of environmental preservation parcels dedicated through the subdivision process. This represents about 32% of the approximate 94,660 total acres of land in the Rural West.

Including County and State parks (8,064 acres), WSSC land (2,438 acres), permanent historic easements (101 acres) and other environmental easements (1,118 acres) the total preserved land amounts to 42,038 acres, about 44% of all land in the Rural West.

Map 10 shows the preserved land as of December 31, 2014 including acquired (purchased) agricultural easements, dedicated agricultural and environmental preserved parcels, other environmental easements, as well as WSSC, County and State park land.

Neighborhood Preservation in the East

The Howard County Zoning regulations were amended effective on September 9, 2008 to allow neighborhood preservation parcels in eastern Howard County. Similar to preservation in the Rural West, neighborhood preservation parcels are created in the east by transferring density rights from a sending parcel, which is permanently preserved, to a receiving parcel to allow additional density above what the by right zoning there allows. For each transaction, sending and receiving parcels must be within the same planning area or within a two-mile radius regardless of the planning area. Additionally, sending parcels that contain a historic structure may exchange density with a receiving parcel in any planning area. Properties must be zoned R-ED, R-20, R-12 or R-SC.

For the current reporting period covering calendar year 2014 there were three receiving subdivisions utilizing this option acquiring a total of five development rights. Table 43 shows the aggregate results since the beginning of this program. A total of seven neighborhood preservation parcels have been created totaling 16.2 acres. The easement holder for all of these acres is Howard County. Through this process, additional density was created for 8 additional single family detached homes, six additional townhomes and 3 additional apartment units on a total of 2.4 acres. These additional units are part of receiving subdivisions that total 311 housing units on 135 acres. Thus far through the end of 2014, 237 of these 311 units are built. It should be noted that 70.2 of the 135 acres are open space acres as normally required by the zoning and subdivision regulations.

Total Preservation Easements in the East

In addition to neighborhood preservation parcels in the east, there are also 194 permanent historic easements, 316 Maryland Environmental Trust and 112 other land trust conservation easements. Total preservation easements in the east therefore amount to 639 acres. This is summarized in Table 44.

Total Preserved Land in the East

Including County and State parks (10,307 acres), WSSC land (677 acres), non-County Open space such as HOA land (2,613) and Columbia Association open space (3,633 acres) the total preserved land amounts to 17,869 acres, about 27% of all land in the east. Map 10 shows the locations of the preserved land by the various types.

Table 43
Neighborhood Preservation, December 31, 2014

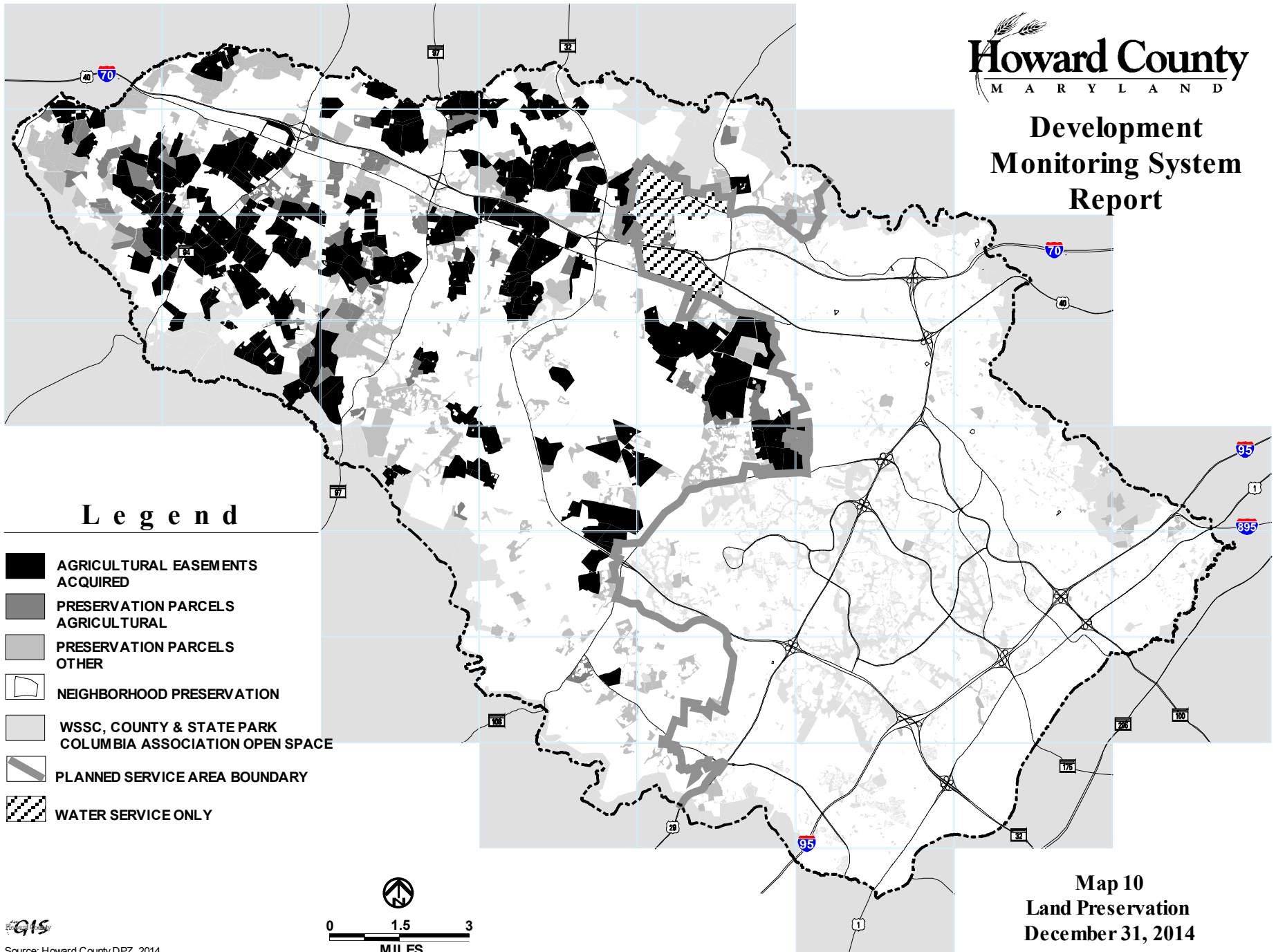
Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Undeveloped Lots (By Right)	31	0	37	68	11.1
Undeveloped Lots (From Density Transfer)	3	0	3	6	0.8
Total Undeveloped Lots	34	0	40	74	11.9
Developed Lots (By Right)	166	60	0	226	40.1
Developed Lots (From Density Transfer)	5	6	0	11	1.6
Total Developed Lots	171	66	0	237	41.7
Open Space					70.2
Roadway					10.3
Other					0.9
Total	205	66	40	311	135.0 89.3%

East Preserved Land - Sending Parcels	Preservation	
Easement Holder	Parcels	Acres
Howard County Government	7	16.2
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Total Preservation	7	16.2 10.7%
GRAND TOTAL		151.2 100.0%

Table 44
East Preservation Easements, December 31, 2014

Type	Acres	Percent
Neighborhood Preservation	16	100%
Permanent Historic Easements	194	31%
Maryland Environmental Trust Easements	316	51%
Land Trust Conservation Easements	112	18%
Total Other Easements	622	100%
TOTAL EAST PRESERVATION	639	

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Non-Residential Development

Non-Residential Subdivisions

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

Recorded Plans

For the latest reporting period there were 8 non-residential lots recorded countywide in 17 subdivision plans totaling 407 acres (Table 45). 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 45
Recorded Non-Residential Subdivisions, 01/01/2014 to 12/31/2014

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	0	0%	3	18%	95	23%
Elkridge	(1)	-13%	5	29%	106	26%
Ellicott City	0	0%	2	12%	59	15%
Rural West	1	13%	2	12%	28	7%
Southeast	8	100%	5	29%	118	29%
TOTAL	8	100%	17	100%	407	100%

Table 49 shows the recorded non-residential subdivisions from October 1, 2009 to December 31, 2014. Over this five year period there were 27 non-residential lots recorded countywide in 101 subdivision plans totaling 1,989 acres. This amounts to an annual average over the analysis time period of 5 lots in 19 plans encompassing 379 acres.

Table 46
Recorded Non-Residential Subdivisions, 10/01/09 to 12/31/14

Countywide	Lots	Plans	Acreage
10/09 to 12/10 *	5	26	647
01/11 to 12/11	6	12	210
01/12 to 12/12	4	22	432
01/13 to 12/13	4	24	293
01/14 to 12/14	8	17	407
TOTAL	27	101	1,989
ANNUAL AVG.	5	19	379

* Extra quarter included due to change in analysis timeframe

In-Process Plans

Countywide, there were 31 non-residential subdivision plans in process as of December 31, 2014. This compares to 23 plans in process for the previous reporting period (Table 47). Two plans were in Downtown Columbia, 8 plans in the rest of Columbia, 6 plans each in Elkridge, Ellicott City, and the Southeast, and 3 plans in the Rural West. Most of the plans were in the final plan or environmental concept plan stage.

Table 48 shows the number of potential non-residential lots in process. As of December 31, 2014, there were 21 lots in process, compared to 14 in process on December 31, 2013. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 415 non-residential acres in the subdivision process as of December 31, 2014 (Table 49). This compares to 366 acres in process one year earlier. For the current year the greatest acreage amount is in Elkridge (162 acres). This is followed by the Rural West with 110 acres, Downtown Columbia with 82 acres, 30 acres in the Southeast, 26 acres in Ellicott City, and 6 acres in the rest of Columbia.

Table 47
Number of Non-Residential Plans in Process, 12/31/2014
with Comparisons to 12/31/2013 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	0	0	2	2
All Other Columbia	6	0	0	0	2	8
Elkridge	2	2	0	0	2	6
Ellicott City	3	0	0	0	3	6
Rural West	2	0	0	0	1	3
Southeast	3	0	0	1	2	6
TOTAL	16	2	0	1	12	31
12/31/13 Total	12	1	0	2	8	23

Table 48
Non-Residential Lots from Subdivision Plans in Process, 12/31/2014
with Comparisons to 12/31/2013 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	0	1	1
Elkridge	7	0	0	0	7
Ellicott City	0	0	0	6	6
Rural West	0	0	0	0	0
Southeast	0	0	2	5	7
TOTAL	7	0	2	12	21
12/31/13 Total	5	0	3	6	14

Table 49
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2014
with Comparisons to 12/31/2013 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	82	82
All Other Columbia	0	0	0	6	6
Elkridge	147	0	0	15	162
Ellicott City	0	0	0	26	26
Rural West	0	0	0	110	110
Southeast	0	0	15	15	30
TOTAL	147	0	15	254	415
12/31/13 Total	122	0	32	212	366

Approved Non-Residential Site Development Plans

The site development plan (SDP) process follows lot creation and is a better gauge of non-residential development activity than subdivision. Once a SDP is approved, construction permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by Planning Area. The number of non-residential site development plans approved, the building square footage, and the acreage of approved plans have been compiled for each Planning Area. The analysis includes last year's site development plan activity as well as activity for the previous four reporting periods.

Summary of Last Year

For the latest reporting period 583,425 square feet were approved in 23 site development plans on 379 acres (Table 50). The greatest amount of square footage approved was in the Southeast, followed by Elkridge, Elliccott City and then Columbia (non-Downtown).

Table 51 shows the approved square footage by building type. About 265,000 square feet, 45% of the total, are for office/service uses, all of which is in the Southeast and Elkridge. About 234,000 square feet, 40% of the total, are for manufacturing/extensive industrial uses all in the Southeast. Retail uses account for about 51,000 square feet, and government and institutional uses account for 12,000 square feet. Chart 13 shows this breakdown graphically.

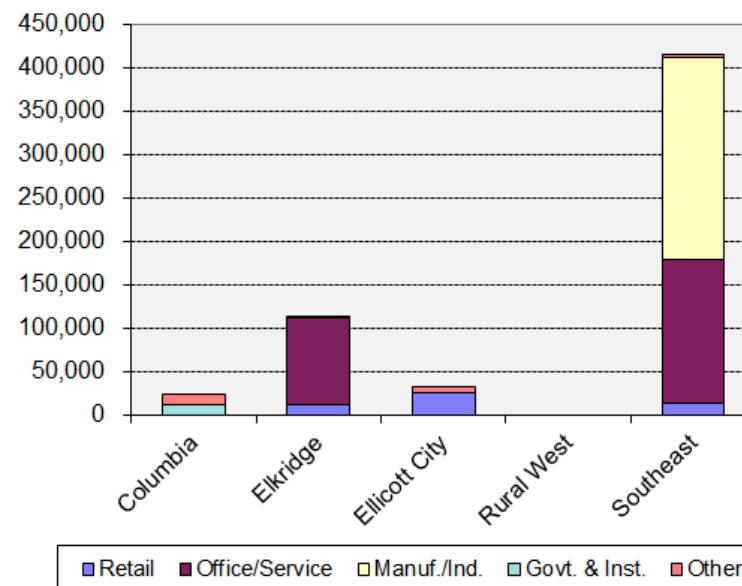
Table 51
Building Square Feet in Approved Non-Residential Site Development Plans
1/1/14 to 12/31/14

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	0	0	0	11,664	12,259	23,923
Elkridge	11,200	101,253	0	0	1,012	113,465
Ellicott City	25,446	0	0	0	6,373	31,819
Rural West	0	0	0	0	0	0
Southeast	14,000	164,052	233,866	0	2,300	414,218
TOTAL	50,646	265,305	233,866	11,664	21,944	583,425
PERCENT	8.7%	45.5%	40.1%	2.0%	3.8%	100.0%

Table 50
Approved Non-Residential Site Development Plans, 1/1/14 to 12/31/14

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	23,923	4%	5	22%	26	7%
Elkridge	113,465	19%	6	26%	76	20%
Ellicott City	31,819	5%	4	17%	16	4%
Rural West	0	0%	4	17%	182	48%
Southeast	414,218	71%	4	17%	79	21%
TOTAL	583,425	100%	23	100%	379	100%

Chart 13
Sq. Ft. in Approved Site Development Plans
1/1/14 to 12/31/14



Last Year's Projects - Greater than 10,000 Square Feet

Of the 583,000 square feet of non-residential building space approved in site development plans last year, about 552,000 square feet, 95% of the total, were in plans with more than 10,000 square feet. These larger plans are shown in Table 52. The locations of these plans are shown on Map 12.

In Columbia, two plans with more than 10,000 square feet were approved last year—the Hobbit's Glen Clubhouse and an expansion of the Owen Brown Interfaith Center. In Elkridge, two larger plans were approved—a total of 89,000 square feet for an office and a retail building in the Meadows Corporate Park and a 13,000 square foot wellness center on Mar-

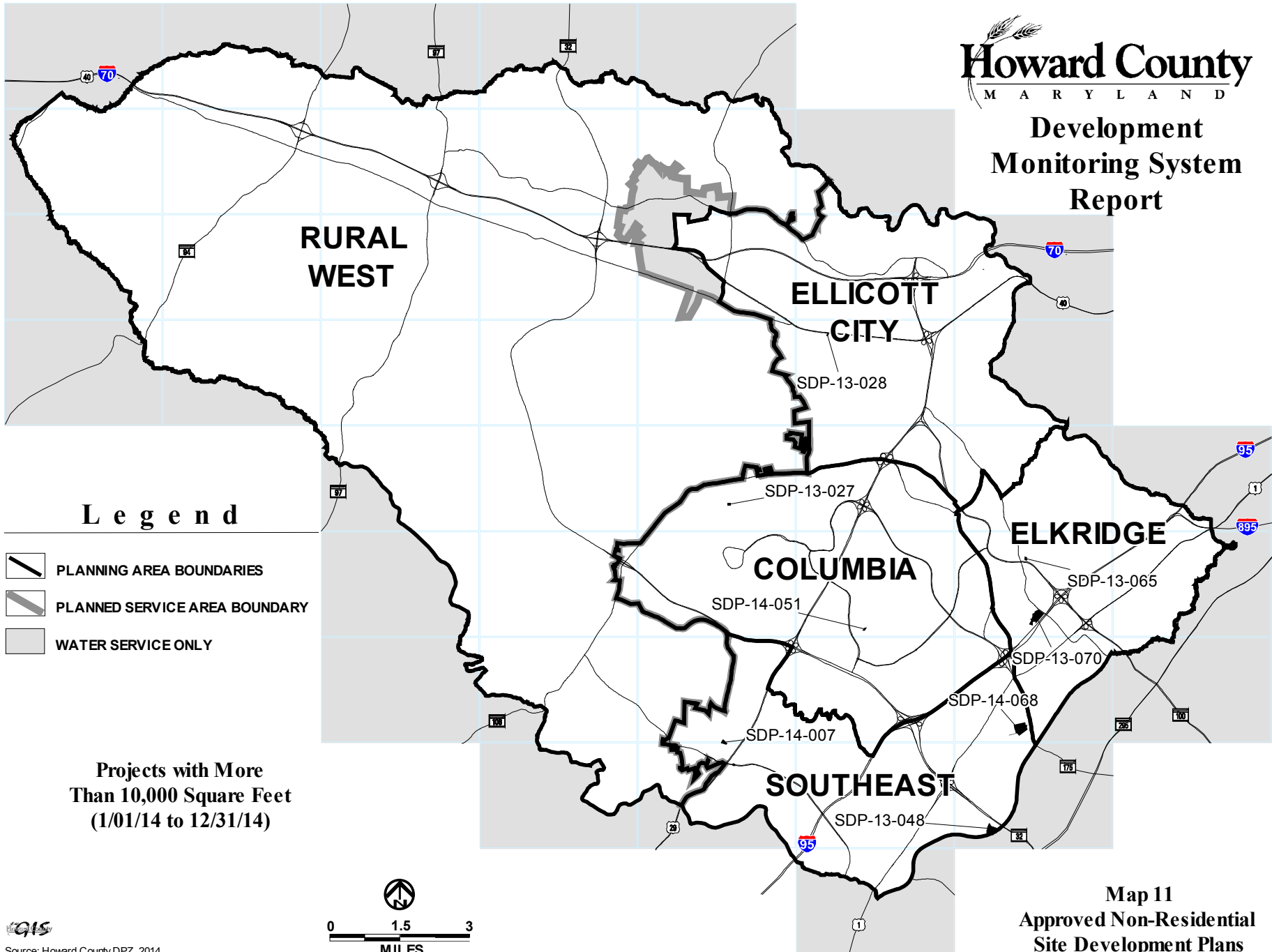
shalee Drive. In Ellicott City, a new 14,550 square foot Walgreens was approved. The largest buildings on approved site plans last year were in the Southeast—a new 267,000 square foot warehouse and office building at the Maryland Food Center, and new 130,000 square foot office building in the Maple Lawn Business District. There was also a 14,000 square foot retail building as part of Annapolis Junction Town Center.

Table 52
Projects With More Than 10,000 Square Feet in Approved Non-Residential Site Development Plans, 1/1/14 to 12/31/14

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-13-027	Hobbit's Glen Golf Clubhouse	Community Room	12,259	23,923
	SDP-14-051	Owen Brown Interfaith Center	Church Expansion	11,664	
Elkridge	SDP-13-070	The Meadows Corporate Park	Office/Retail Building	88,687	101,687
	SDP-13-065	Wellness Center of Howard County	Wellness Center	13,000	
Ellicott City	SDP-13-028	Walgreens	Retail	14,550	14,550
Southeast	SDP-14-068	Maryland Food Center	Warehouse/Office	267,289	411,918
	SDP-14-007	Maple Lawn Farms Business District	Office Building	130,629	
	SDP-13-048	Annapolis Junction Town Center	Retail	14,000	
TOTAL					552,078

Howard County MARYLAND

Development Monitoring System Report



Source: Howard County DPZ, 2014.

Map 11
Approved Non-Residential
Site Development Plans

Five Year Results

Table 53 shows the Countywide approved non-residential site development plans for the last five reporting periods from October 1, 2009 to December 31, 2014. Over this timeframe there were 124 plans approved on 1,461 acres including 3.9 million square feet of building space. This equates to an annual average of about 739,000 square feet of new building space per year.

Last year, with 583,000 square feet of approved space, was less than the 1.1 million square feet approved the year before. Chart 17 depicts these annual amounts. The amount of non-residential building square feet in approved site development plans had been on the rise since 2011, but dropped last year.

Table 54 shows the five year history by building type. Over the five years, about 49% of the total 3.9 million square feet was for office/service space. About 25% was for manufacturing/extensive industrial space, 14% for government and institutional uses, 11% for retail uses and less than 2% for other uses.

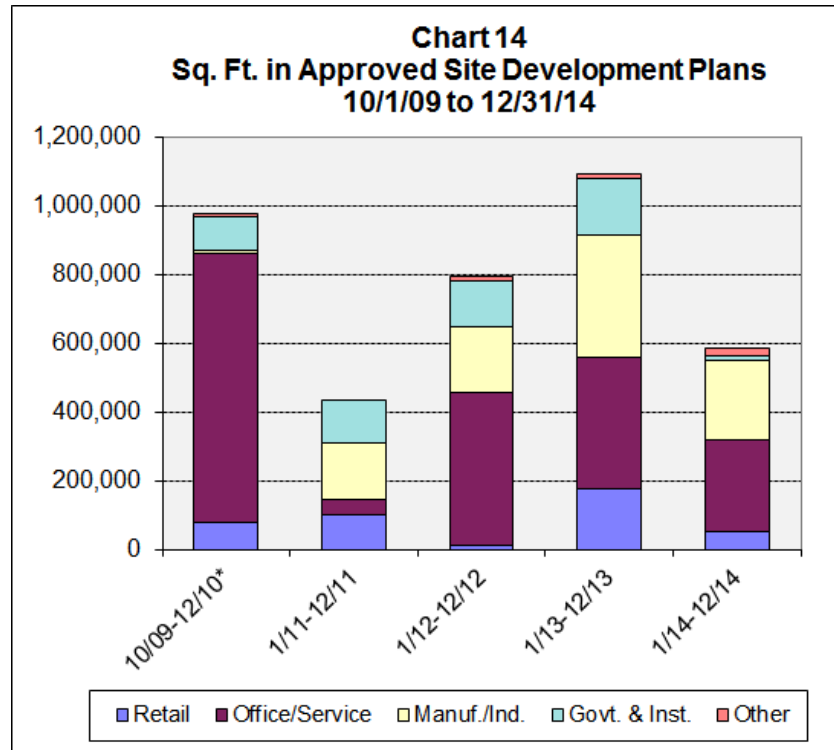


Table 53
Approved Non-Residential Site Development Plans
10/01/09 to 12/31/14

Year	Square Feet	Number or Plans	Acreage
10/09-12/10*	977,620	35	315
1/11-12/11	434,304	19	152
1/12-12/12	794,171	16	191
1/13-12/13	1,091,021	31	424
1/14-12/14	583,425	23	379
TOTAL	3,880,541	124	1,461
ANNUAL AVG.	739,151	24	278

* Extra quarter included due to change in analysis timeframe

Table 54
Building Square Feet in Approved Non-Residential Site Development Plans
10/01/09 to 12/31/14

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/09-12/10*	77,363	783,249	10,420	94,929	11,659	977,620
1/11-12/11	99,797	42,560	167,419	124,528	0	434,304
1/12-12/12	10,180	446,128	188,527	136,306	13,030	794,171
1/13-12/13	175,929	379,888	355,902	164,677	14,625	1,091,021
1/14-12/14	50,646	265,305	233,866	11,664	21,944	583,425
TOTAL	413,915	1,917,130	956,134	532,104	61,258	3,880,541
PERCENT	10.7%	49.4%	24.6%	13.7%	1.6%	100.0%

* Extra quarter included due to change in analysis timeframe

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of December 31, 2014 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 25 non-residential site development plans in process as of December 31, 2014. These plans include about 683,000 square feet of building space covering 292 acres. This compares to about 620,000 square feet in 32 plans on 425 acres that were in process the previous year (on December 31, 2013).

As shown in Table 55, Columbia had the most square footage in process, followed by the Southeast and then Elkridge. Table 56 shows a more detailed breakdown of square footage by building type. About 222,000 square feet are for government and institutional use buildings and 188,000 square feet for retail uses. Manufacturing/extensive industrial space accounts for 151,000 square feet.

Major Projects

Table 57 shows site development plans with buildings greater than 20,000 square feet. Map 13 shows the locations of these projects. These projects account for about 74% of the total 682,000 square feet of building space in process.

Table 55
In-Process Non-Residential Site Development Plans, 12/31/14
with Comparisons to Countywide In-Process on 12/31/13

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	44,190	6%	2	8%	22	7%
All Other Columbia	344,354	50%	8	32%	76	26%
Elkridge	83,814	12%	6	24%	23	8%
Ellicott City	70,331	10%	3	12%	8	3%
Rural West	46,384	7%	4	16%	146	50%
Southeast	93,382	14%	2	8%	16	6%
TOTAL	682,455	100%	25	100%	292	100%
12/31/2013	619,755		32		425	

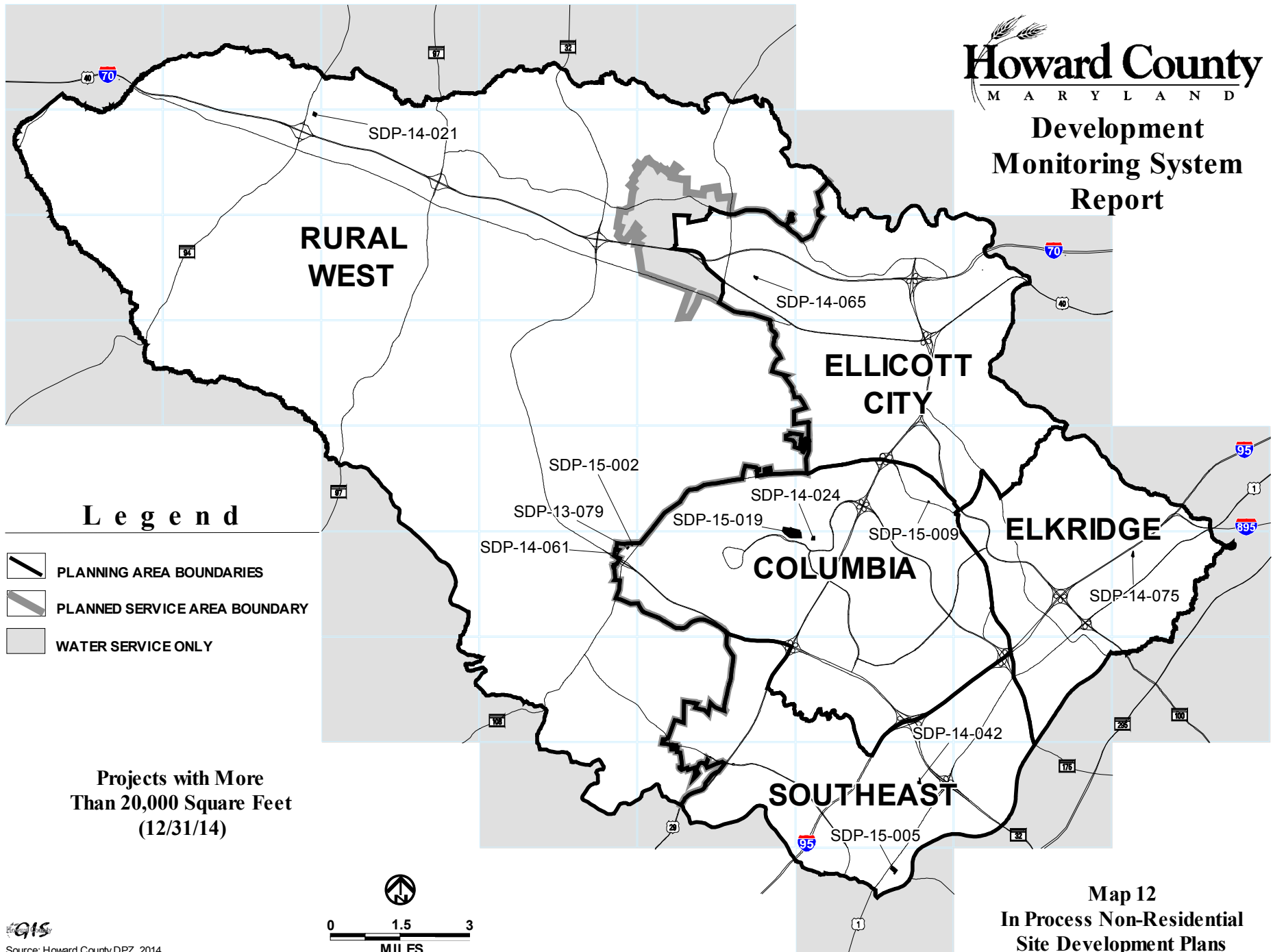
Table 56
Building Square Feet in In-Process Site Development Plans, 12/31/14
with Comparisons to Countywide In-Process on 12/31/13

Region	Building Type					TOTAL
	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	
Downtown Columbia	32,980	0	0	0	11,210	44,190
All Other Columbia	113,377	3,712	121,044	106,221	0	344,354
Elkridge	12,739	18,314	0	52,761	0	83,814
Ellicott City	2,031	68,300	0	0	0	70,331
Rural West	27,200	19,184	0	0	0	46,384
Southeast	0	0	30,015	63,367	0	93,382
TOTAL	188,327	109,510	151,059	222,349	11,210	682,455
PERCENT	27.6%	16.0%	22.1%	32.6%	1.6%	100.0%
12/31/2013	148,092	384,805	28,744	42,709	15,405	619,755

Table 57
Projects With More Than 20,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/14

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-14-024	Downtown Columbia	Restaurant/Retail	27,025	27,025
Columbia	SDP-15-009	ez Storage	Self-Storage Building	121,044	
	SDP-15-019	Wilde Lake Middle School	School Replacement	106,221	
	SDP-13-079	Clarksville Commons	Shopping Center	53,782	
	SDP-15-002	Conscious Corner	Commercial Building	21,757	
	SDP-14-061	Antwerpen Hyundai	Auto Sales/Service, Car Wash	21,370	324,174
Elkridge	SDP-14-075	Elkridge Volunteer Fire Station	Fire Station	34,052	34,052
Ellicott City	SDP-14-065	Turf Valley Tennis Center	Tennis Clubhouse	56,000	
Rural West	SDP-14-021	Wilson Village	Shopping Center	27,200	27,200
Southeast	SDP-14-042	Bethel Ministries, Inc.	School	63,367	
	SDP-15-005	Napa Washington	Warehouse	30,015	93,382
TOTAL					505,833

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

Summary of Last Year

For the latest reporting period, from January 1, 2014 to December 31, 2014, 67 permits were issued for 915,000 square feet in non-residential building space (Table 58). The greatest amount of square footage was in the Southeast, followed by Elkridge, Columbia and Ellicott City.

Table 58
Issued Non-Residential Building Permits, 1/01/14 to 12/31/14

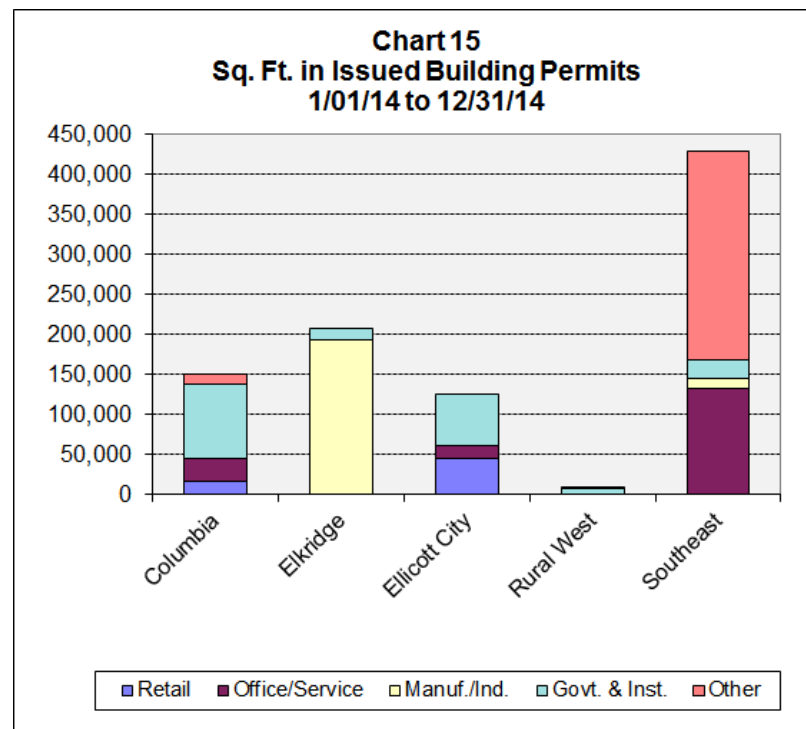
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%
All Other Columbia	149,415	16%	25	37%
Elkridge	206,093	23%	9	13%
Ellicott City	124,003	14%	17	25%
Rural West	7,785	1%	6	9%
Southeast	428,063	47%	10	15%
TOTAL	915,359	100%	67	100%

Table 59 shows the approved square footage by building type. About 261,000 square feet, 30% of the total, are categorized in the Other uses category. Most of this is for a large parking structure as part of the Annapolis Junction Town Center mixed use project. Another 22%, about 205,000 square feet, are for manufacturing/Extensive industrial uses. This is followed by Government & institutional, Office/Service and Retail uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 59
Building Square Feet in Issued Non-Residential Building Permits
01/01/14 to 12/31/14

Region	Office/Service		Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
	Retail	Service	Ext. Ind.	& Inst.	Other	
Downtown Columbia	0	0	0	0	0	0
Columbia	16,455	28,053	0	93,407	11,500	149,415
Elkridge	0	0	193,314	12,779	0	206,093
Ellicott City	44,783	16,466	0	62,754	0	124,003
Rural West	0	0	0	7,593	192	7,785
Southeast	571	130,886	11,978	23,329	261,299	428,063
TOTAL	61,809	175,405	205,292	199,862	272,991	915,359
PERCENT	6.8%	19.2%	22.4%	21.8%	29.8%	100.0%

Chart 15
Sq. Ft. in Issued Building Permits
1/01/14 to 12/31/14



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

Of the 915,000 square feet of non-residential building space in issued permits over the current reporting period, about 677,000 square feet, 74% of the total, were in plans with more than 30,000 square feet. These larger buildings and structures are shown in Table 60. The location of these buildings are shown on Map 14.

The largest project was the Savage Marc Commuter Station parking garage as part of the Annapolis Junction Town Center mixed-use development (258,355 square feet) in the Southeast Planning Area. A large 130,886 of-fice building in Maple Lawn was also permitted in the Southeast.

In ElkrIDGE's Jessup Park, a building permit for a large 156,140 square foot warehouse and office building was issued.

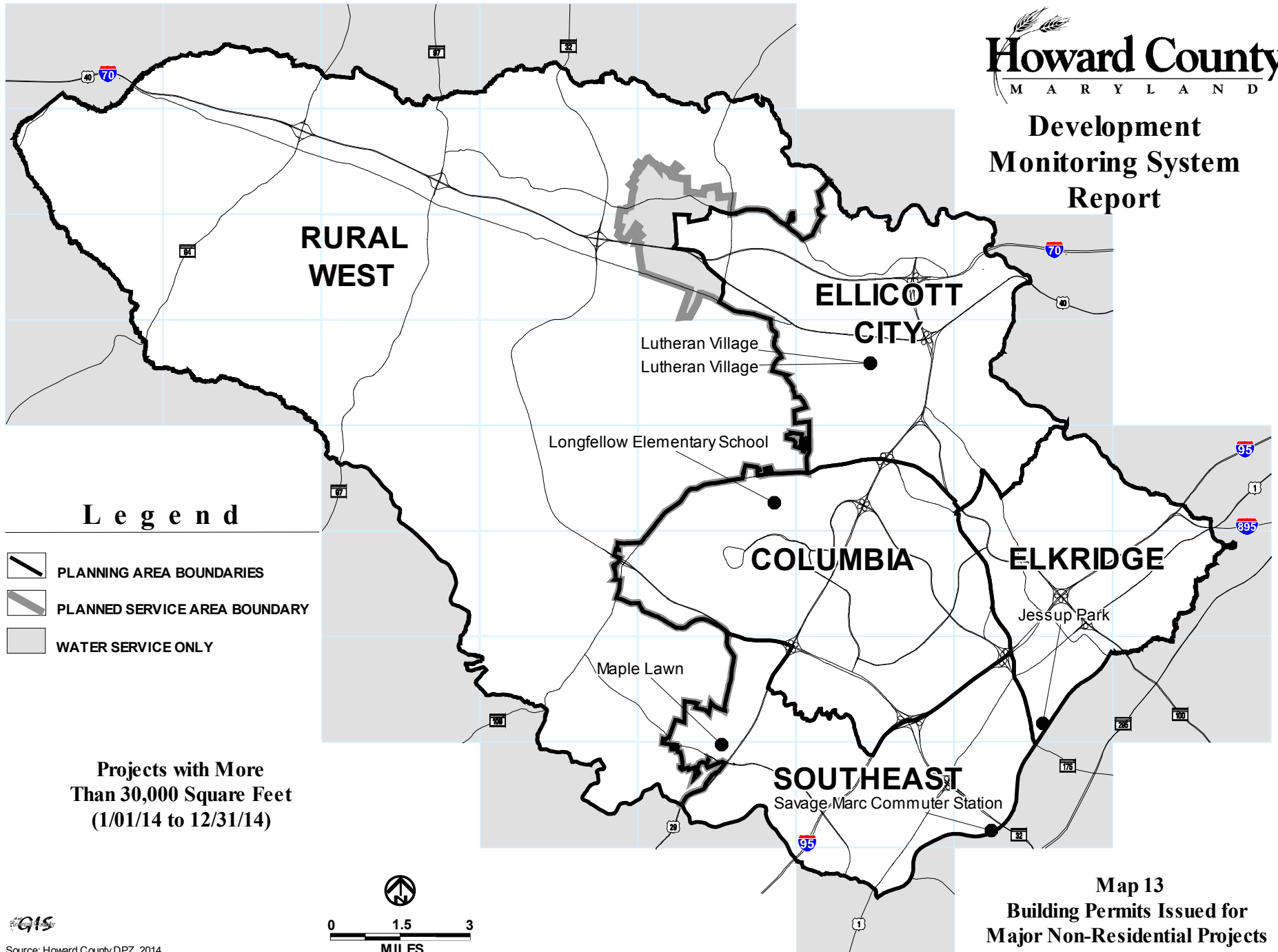
In Columbia, Longfellow Elementary School received a building permit for an addition and alterations (68,590 square feet).

In Ellicott City, a new 31,698 square foot community center and a new 31,056 square foot institutional care facility were permitted as part of Lutheran Village.




Table 60
Building Permits Issued for Major Non-Residential Projects With More Than 30,000 Square Feet, 1/01/14 to 12/31/14

Region	Name	Proposed Use	Square Feet	TOTAL
Columbia	Longfellow Elementary School	School Addition/Alterations	68,590	68,590
ElkrIDGE	Jessup Park	New Warehouse/Office Building	156,140	156,140
Ellicott City	Lutheran Village	Community Center	31,698	62,754
	Lutheran Village	Institutional - Care Facility	31,056	
Southeast	Maple Lawn	Office Building	130,886	389,241
	Savage Marc Commuter Station	Parking Garage	258,355	
TOTAL				676,725

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Legend

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

**Projects with More
Than 30,000 Square Feet
(1/01/14 to 12/31/14)**

**Map 13
Building Permits Issued for
Major Non-Residential Projects**



Source: Howard County DPZ, 2014.



Five Year Results

Table 61 shows issued non-residential building permits countywide for the last five reporting periods from October 1, 2009 to December 31, 2014. Over this timeframe there were 361 permits issued for about 5.2 million square feet of building space. This equates to an annual average of about 992,000 square feet per year.

The latest reporting period, with 915,359 square feet in issued permits is a 31% decrease from the 1,327,421 square feet permitted the year before.

Table 62 shows the five year history by building type. Over the five years, 38% of the total 5.2 million square feet was for office/service space. About 13% was for retail space, 23% for government and institutional uses and 16% for manufacturing/extensive industrial space. Chart 16 shows this graphically.

Table 61
Issued Non-Residential Building Permits
10/01/09 to 12/31/14

Year	Square Feet	Number of Permits
10/09-12/10*	1,117,809	83
1/11-12/11	777,912	61
1/12-12/12	1,071,462	60
1/13-12/13	1,327,421	90
1/14-12-14	915,359	67
TOTAL	5,209,963	361
ANNUAL AVG.	992,374	69

* Extra quarter included due to change in analysis timeframe

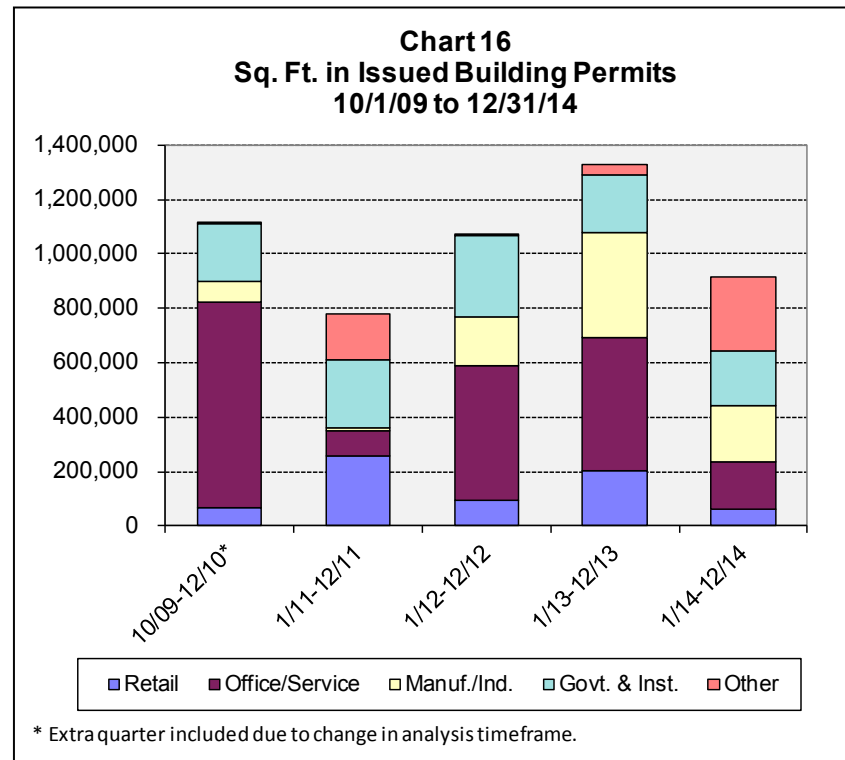


Table 62
Building Square Feet in Issued Non-Residential Building Permits
10/01/09 to 12/31/14

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
10/09-12/10*	68,708	752,768	75,881	212,786	7,666	1,117,809
1/11-12/11	259,420	90,853	9,310	253,670	164,659	777,912
1/12-12/12	95,062	493,817	178,211	298,531	5,841	1,071,462
1/13-12/13	202,457	490,437	383,615	216,024	34,888	1,327,421
1/14-12/14	61,809	175,405	205,292	199,862	272,991	915,359
TOTAL	687,456	2,003,280	852,309	1,180,873	486,045	5,209,963
PERCENT	13.2%	38.5%	16.4%	22.7%	9.3%	100.0%

Employment Estimates

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

Table 63
Square Feet per Employee Standard Factors

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

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

Job Potential from Site Development Plans

Based on the above factors, building space in site development plans approved last year from January 1, 2014 to December 31, 2014 could accommodate an estimated 1,445 employees (Table 65). About 64% of the potential jobs are located in the Southeast with a mix of job types. About 30% of the potential jobs are located in Elkridge. Only 4% of the jobs are in Ellicott City and 2% in Columbia.

Countywide, 1,061 potential jobs, about 73% of the total, are office/service jobs. Another 234 are manufacturing/extensive industrial jobs (16%). This is followed by 127 retail jobs (9%) and 23 government & institutional jobs (2%).

Table 64
Potential Employment from Approved Non-Residential SDP's
By Use Category, 1/1/14 to 12/31/14

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	0	0	0	23	23	2%
Elkridge	28	405	0	0	433	30%
Ellicott City	64	0	0	0	64	4%
Rural West	0	0	0	0	0	0%
Southeast	35	656	234	0	925	64%
TOTAL	127	1,061	234	23	1,445	100%
PERCENT	8.8%	73.4%	16.2%	1.6%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 65 below, there is a potential of 1,461 new jobs that could be accommodated based on issued building permits. About 48% of the total are potential office/service jobs, mostly in the Southeast. This is followed by 27% government and institutional jobs, 14% manufacturing/extensive industrial jobs and 11% retail jobs.

Table 65
Potential Employment from Issued Building Permits
By Use Category, 1/1/14 to 12/31/14

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	41	112	0	187	340	23%
Elkridge	0	0	193	26	219	15%
Ellicott City	112	66	0	126	303	21%
Rural West	0	0	0	15	15	1%
Southeast	1	524	12	47	584	40%
TOTAL	155	702	205	400	1,461	100%
PERCENT	10.6%	48.0%	14.0%	27.4%	100.0%	

State DLLR and U.S. BEA Employment Estimates

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

DLLR reports statistics produced by Maryland’s ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance Law of Maryland and the unemployment compensation for federal employees program. Together these two account for approximately 98% of all wage and salary civilian employment. Since wage and salary employment represents approximately 93% of total civilian employment, DLLR estimates that their data reflects over 91% of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 29% of Howard County’s employment in 2013 was not reported by the State.

Table 66 shows both DLLR and BEA employment data beginning in 2000. BEA data have a one year reporting time lag resulting in no available data for 2014. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,222 jobs per year for the last 15 years. Job losses for 2009 and 2010 due to the recession as reported by DLLR have lowered this longer term average.

Jobs reported by the BEA through 2013 (the latest year available) result in an annual average of 3,529 new jobs from 2000 to 2014.

For the most recent reporting period, from 2013 to 2014, the State reports a decrease of 449 jobs in Howard County. This follows three years of job increases, which in turn had followed two years of job losses due to the recession, which lasted from December 2007 through June 2009. That had been the first two year decline in jobs in Howard County in recent history (at least as far back as 1969).

Table 67 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2013 and 2014. In the first quarter of 2014, DLLR reported that there were 155,951 jobs in Howard County with an average weekly wage of \$1,220. This compares to 156,400 jobs one year earlier with an average wage of \$1,188. This is a 2.7% increase in average weekly wages over the one year time period.

Table 66
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Change	Jobs	Increase
2000	124,843		159,188	
2001	130,717	5,874	165,691	6,503
2002	133,338	2,621	168,458	2,767
2003	133,231	(107)	168,918	460
2004	136,493	3,262	173,641	4,723
2005	135,462	(1,031)	178,718	5,077
2006	141,236	5,774	186,766	8,048
2007	145,385	4,149	189,021	2,255
2008	147,573	2,188	190,256	1,235
2009	142,266	(5,307)	188,238	(2,018)
2010	141,169	(1,097)	189,573	1,335
2011	147,357	6,188	195,619	6,046
2012	154,504	7,147	202,127	6,508
2013	156,400	1,896	205,071	2,944
2014	155,951	(449)	NA	NA
Average		2,222		3,529

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

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

Table 67
Jobs and Weekly Wages by Industry, 2013 and 2014

Job Type	2013		2014	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	601	\$1,547	595	\$1,647
State Government	1,506	\$990	1,484	\$910
Local Government	14,627	\$1,020	14,741	\$1,044
Subtotal/Average	16,734	\$1,036	16,819	\$1,036
Goods Producing				
Natural Resources and Mining	257	\$631	255	\$643
Construction	9,661	\$1,202	9,893	\$1,227
Manufacturing	7,500	\$1,431	7,497	\$1,433
Subtotal/Average	17,417	\$1,292	17,645	\$1,306
Service Providing				
Trade, Transportation, and Utilities	33,450	\$963	32,660	\$1,028
Information	3,825	\$1,998	3,818	\$2,073
Financial Activities	8,938	\$1,747	8,903	\$1,816
Professional and Business Services	41,596	\$1,643	40,912	\$1,678
Education and Health Services	16,072	\$882	16,744	\$899
Leisure and Hospitality	13,884	\$366	13,925	\$372
Other Services	4,485	\$569	4,525	\$669
Subtotal/Average	122,249	\$1,195	121,487	\$1,231
TOTAL	156,400	\$1,188	155,951	\$1,220

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

Howard County Department of Planning and Zoning
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