



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

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Development Monitoring System Report

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Executive Summary

Adequate Public Facilities Act

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

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

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

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

Development Monitoring System Report (DMS)

This is the 24th 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 fourth 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.

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

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

APFO restrictions, which is required to be reported every other year, is also included in this year's report

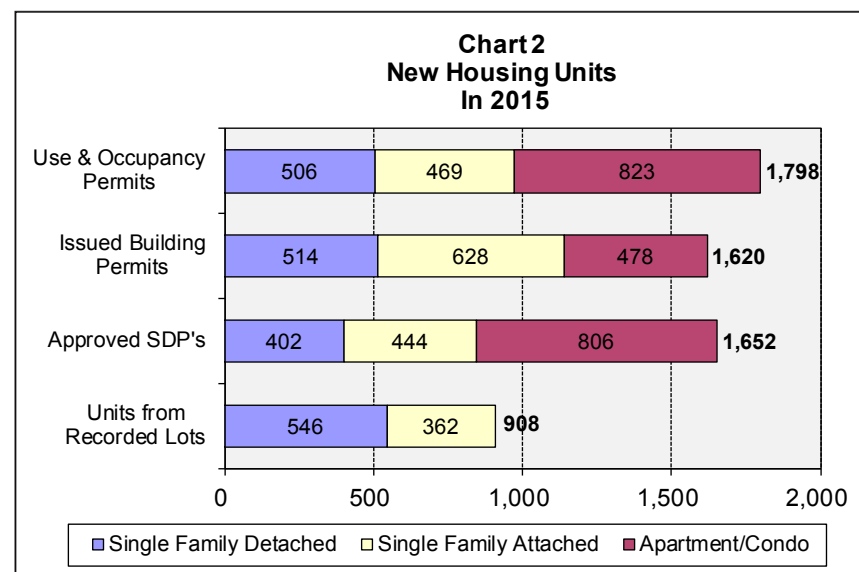
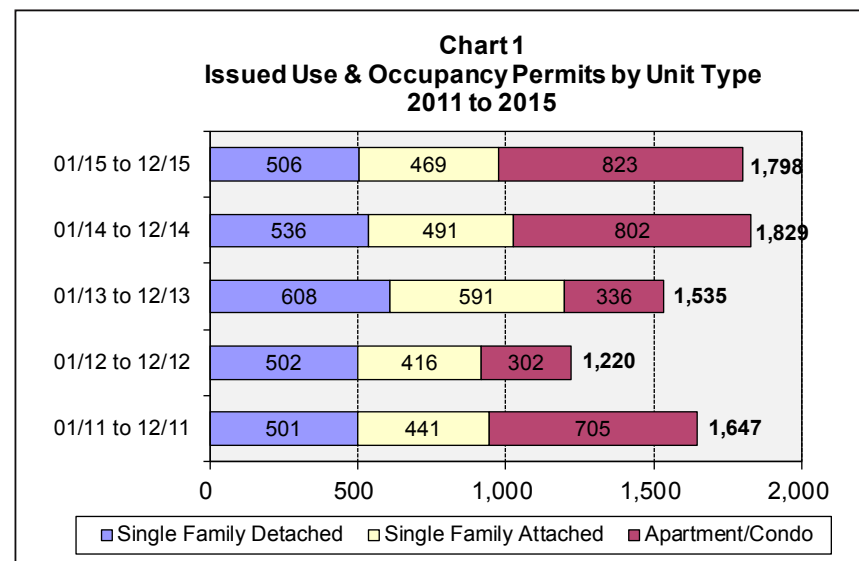
The reporting of these additional items not only meet the State planning requirements, but given that they will be integrated into DPZ's existing reporting process and structure, further context will be created—a context that will enable a better understanding of land development issues, policies and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

Residential Development

Total Housing Activity

- During the latest reporting period, from January through December 2015, 1,798 housing units were built. This is a slight decrease from the previous reporting period when 1,829 units were built, and the second highest number built over the last five years (Chart 1).
- Of the 1,798 completed units last year, 28% were single family detached units, 26% were townhouse units and 46% 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 1,606 new housing units built in the County. About 33% of these have been single family detached units, 30% single family attached or townhouse units, and 37% apartment units (including both rental and condo).
- Last year, 28% of all units were built in Ellicott City, 25% in Elkridge, 21% in Downtown Columbia, 15% in the Southeast, 9% in the Rural West, and 1% in the rest of Columbia. (See the map on Page 6 that show these five planning areas.)
- There were 1,620 building permits issued (housing starts) during 2015 (Chart 2). This is 11% more than the 1,453 permits issued in 2014.
- In 2015 there was potential for 908 housing units from recorded lots and 1,652 units approved in site development plans (Chart 2).
- As of December 31, 2015 there were 9,241 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 9,339 units in process for the prior reporting period (December 31, 2014).
- A significant number of the in-process units—7,786 or 84% of the total 9,241—are included in future phases of phased projects with development planned as far out as 2026. The larger phased plans include Laurel Park Station and Maple Lawn South 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, 16% of the units in process on December 31, 2015 were single family detached units. About 18% were single family attached units and another 66% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 168 age-restricted housing units built in 2015, 9% of the 1,798 total units built in the County. Of these, 48 were single family detached units, 72 were townhouse units and 48 were apartment or condo units.
- As of December 31, 2015 there were 22 age-restricted units in the planning process, all of which are single family attached units in a single subdivision plan called Simpson Mill in Columbia. For the previous reporting period there were 194 age-restricted units in process, 172 more than the current year.

Moderate Income Housing Units

- During 2015 there were 90 MIHU units in approved plans—50 townhouse units and 40 apartment or condo units. This is less than the 177 approved MIHU units the previous reporting period.
- As of December 31, 2015 there were 625 MIHU units in process—3 single family detached units, 112 townhomes, and 510 apartment or condo units. About 64% of the units were in Elkridge, 31% in the Southeast, 3% in Columbia (not downtown) and 2% in Ellicott City. By comparison, there were 728 MIHU units in process the previous reporting period.
- Of the 625 MIHU units in process, none are in age-restricted projects.

Rural Land Preservation

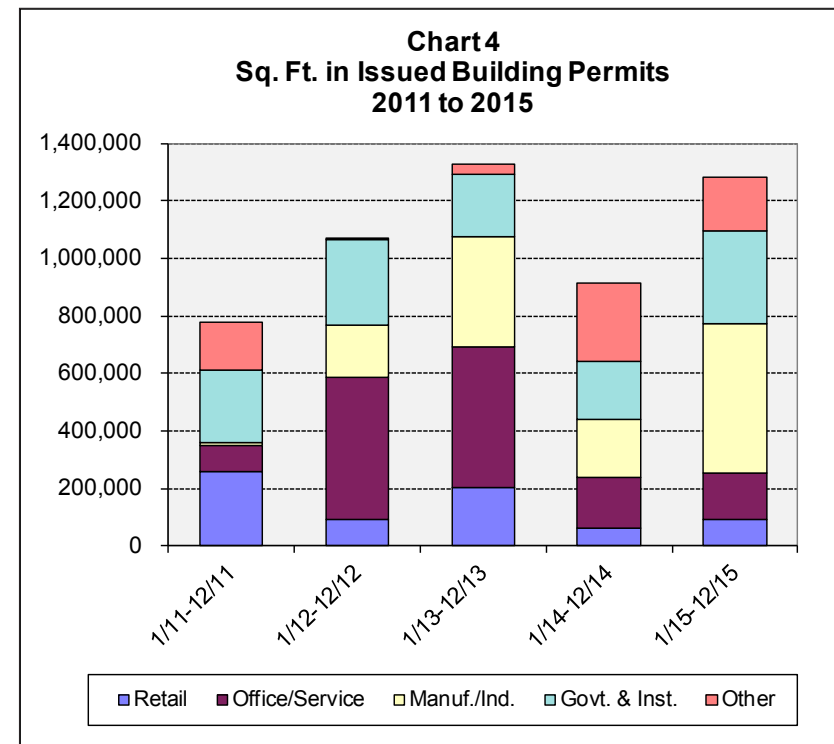
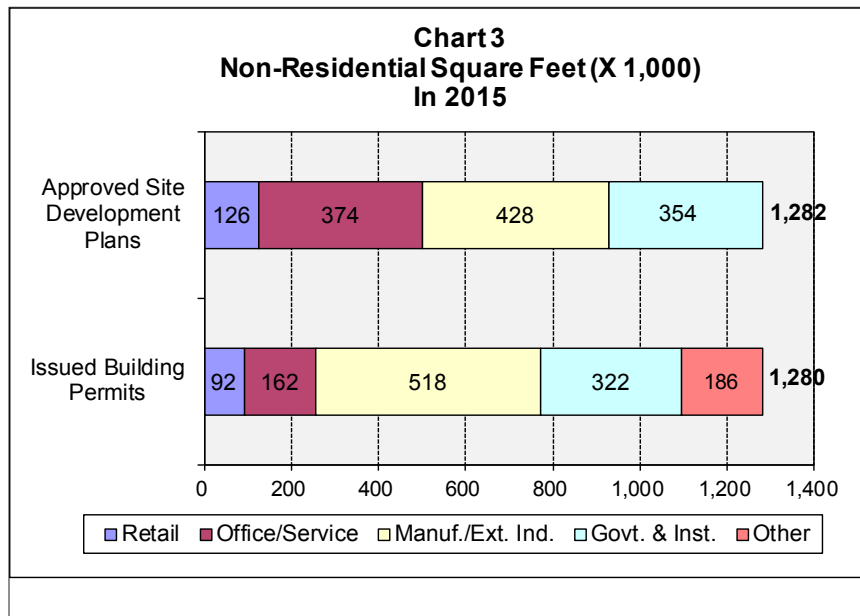
- In 2014 four settlements totalling 190 acres were added to the County's Agricultural Land Preservation Program. An additional 210 acres of environmentally sensitive land were permanently preserved in the Rural West through subdivision activity using the cluster subdivision zoning regulations and Density/Cluster Exchange Options (DEO/CEO).
- Preservation easements in the Rural West have been steadily increasing and now total 30,725 acres. This includes 22,225 acres of agricultural preservation easements and 8,500 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, 45% of the Rural West is now permanently preserved.

Non-Residential Development

- In 2015, close to 1.3 million square feet of building space were approved in site development plans. Building permits were issued for about the same amount, also close to 1.3 million square feet. (Chart 3).
- As shown in Chart 4 there was an increase in the square footage of issued building permits last year, from a little more than 900,000 square feet issued in 2014 to almost 1.3 million square feet issued in 2015.
- Over the last five years, there was an annual average of 834,000 square feet in approved non-residential site development plans and 1.07 million square feet in issued non-residential building permits.
- About 60% of the new building space constructed last year is located in the Southeast and 24% in Columbia (non-downtown). About 8% of the

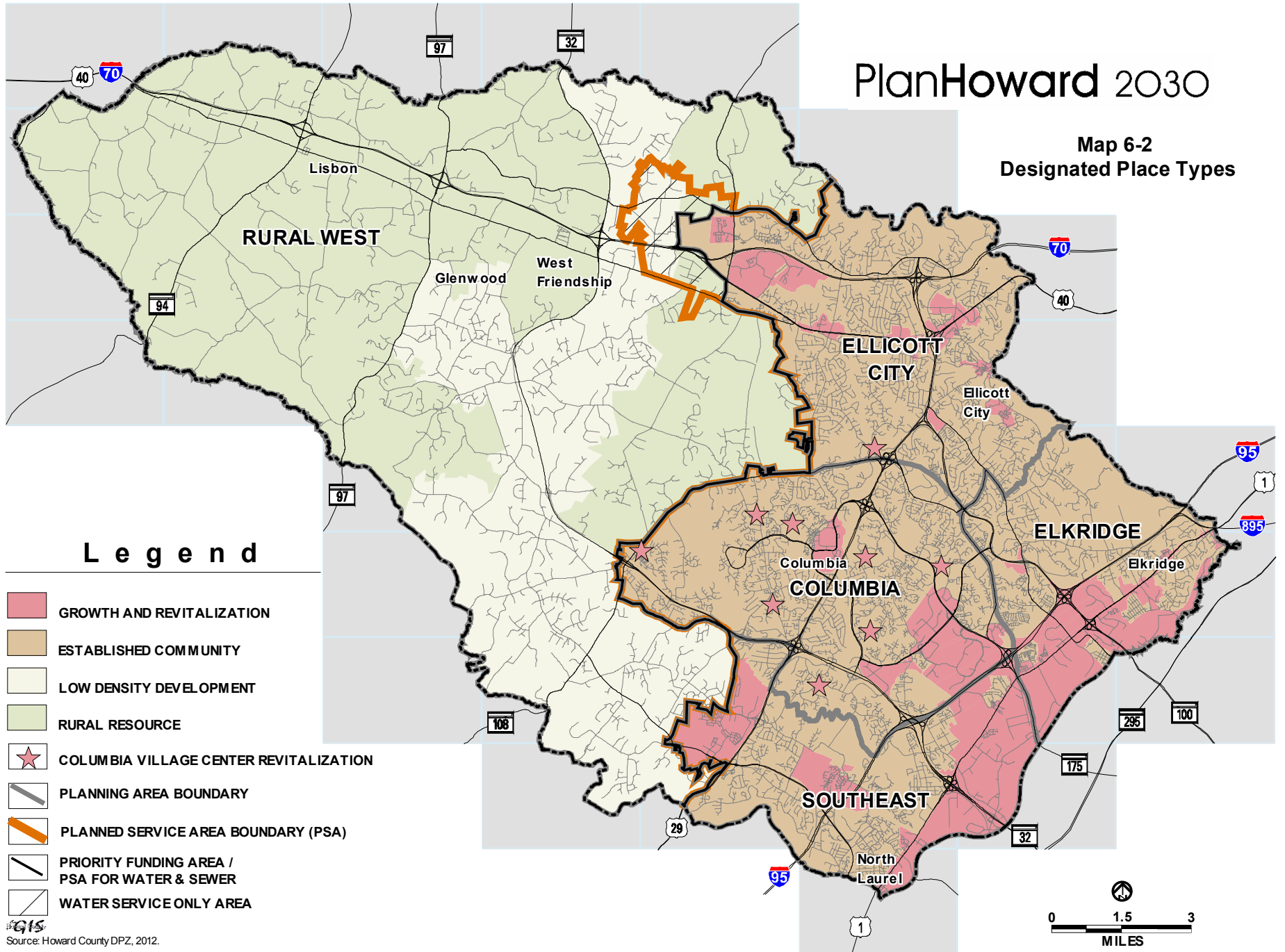
total was constructed in Elkridge, 5% in Ellicott City, 2% in Downtown Columbia, and 1% in the Rural West.

- As of December 31, 2015, there were 529,000 square feet of non-residential in-process in site development plans. This is more than the 682,000 square feet in process the previous year.
- According to the State Department of Labor, Licensing and Regulation, the County gained 3,580 jobs last year (1st quarter 2014 to 1st quarter 2015 statistics). The total number of jobs in Howard County as of the 1st quarter 2015 was 159,531.



PlanHoward 2030

Map 6-2
Designated Place Types



Smart Growth Information

Smart, Green and Growing Legislation

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

This DMS report, issued annually by DPZ as required by the county's 1992 APFO law, already includes most of what is required per the State law and these items continue to be covered in the subsequent sections of this report. There are some additional items, however, that were not included. The purpose of this section is to cover these additional items. Note that this DMS report also include 5 year development summaries and other information that satisfy the more recent 2013 amendments to the Smart, Green and Growing legislation.

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

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

Regulatory Activity

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

CR 42-2015 — Community Legacy Financing

This resolution approves the application and receipt of financing for a Community Legacy Project in Howard County. The grant-financed project is for facade improvements in the Sustainable Community of Ellicott City, to be financed either directly by the Maryland Department of Housing and Community Development or through other departments or agencies of the State of Maryland.

CB 15-2015 — Special Event Recycling

This bill requires certain recycling services for certain special events as required by State law. It required compliance with the County's Solid Waste Management Plan and authorizes certain inspections and provides for certain penalties.

CR 40-2015 — Revision to the Howard County Solid Waste Management Plan

This resolution approves a comprehensive revision to the Howard County Solid Waste Management Plan that also includes special events recycling as required by State law.

CR 17-2015 — Neighborhood Revitalization Community Development Block Grant Program

This resolution endorses the Howard County's Office of Emergency management's application with the Division of Neighborhood Revitalization, Community Development Block Grant Program, in the Maryland Department of Housing and Community Development for certain grants under the National Disaster Resilience Competition in the U.S. Department of Housing and Urban Development. Grant monies would specifically address flooding issues in downtown Ellicott City by implementing projects including the purchase of certain properties, the repair of river banks and retaining walls, the installation of more storm drains and other storm water management systems, and improvements to the water channel in the Patapsco River through Ellicott City.

CB 43-2015 — 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 58.7 acres of agricultural land located at 15685 Old Frederick Road, Woodbine, Howard County, Maryland.

CB 40-2015 — 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 29.38 acres of agricultural land located at 13945 Forsythe Road, Sykesville, Howard County, Maryland.

CB 30-2015 — 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 50.12 acres of agricultural land located at Winstead Road, Woodstock, Howard County, Maryland.

CB 14-2015 — 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 52.95 acres of agricultural land located on Manor Lane, Ellicott City, Howard County, Maryland.

CB 12-2015 — 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 167.82 acres of agricultural land located at 15325 Leondina Drive, Glenwood, Howard County, Maryland.

CB 3-2015 — Office of Community Sustainability

This bill changes the name of the Office of Environmental Sustainability in the Executive Branch to the Office of Community Sustainability. It amends the qualifications of the Office administrator, the duties and responsibilities of the Office, and makes certain technical corrections.

CB 18-2015 — Patapsco Heritage Area Management Plan

This bill amends PlanHoward 2030, the general plan for Howard County, to include Patapsco Heritage Area Management Plan and recognizes that the Plan is a way to further opportunities for recreation, environmental and historic conservation, and heritage tourism and to support economic development.

CR 123-2014 — Riverwatch Payment in Lieu of Taxes Agreement

This resolution approves the terms and conditions of a Payment in Lieu of Taxes Agreement by and between the Howard County, Maryland and Riverwatch Elkridge LLP, a limited liability limited partnership, for a multi-family affordable rental housing development to be known as Riverwatch.

CB 42-2015 — Providing \$50,000 for the Village of Oakland Mills

This budget bill includes a provision of \$50,000 to be used by the Department of Planning and Zoning for master planning efforts to include a concept development plan, feasibility study and financial analysis for the Village of Oakland Mills in Columbia, MD.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County in 2015. Related land use legislation is also included.

CB 55-2015 — Temporary BRX/BR Interim Development Act

This bill establishes the temporary BRX/BR Interim Development Act, which temporarily prohibits applications for proposed rezonings to the BRX and BR zoning districts finding that such applications, if approved under the current Zoning Regulations, could lead to development incompatible with surrounding residential uses. The purposes of this Act are to provide the Department of Planning and Zoning time to study the deficiencies in the BRX and BR districts, investigate alternatives and make recommendations for improvement and give the County Council time to act on the recommendations. The temporary prohibition is to expire on April 11, 2017.

CB 39-2015 — Limited Outdoor Social Assemblies Conditional Use

This bill amends the Howard County Zoning Regulations' Limited Outdoor Social Assemblies conditional use provision to permit the interior use of existing farm structures during events.

CB 38-2015 — Demirel Plaza-Personal Service Establishments

This bill amends the Howard County Zoning Regulations' OT (Office Transition) District to add Personal Service Establishments as a permitted use, provided that the floor area of such uses does not exceed 50% of the floor area of all nonresidential uses on the approved OT site development plan.

CB 37-2015 — Home-Based Contractors Conditional Use

This bill amends the Howard County Zoning Regulations' Home-Based Contractors conditional use to permit the Home-Based Contractors conditional use in the R-20 zoning district under certain conditions, and generally relating to Home-Based Contractors.

CB 36-2015 — R-APT Zoning District Amendment

This bill amends the Howard County Zoning Regulations' R-APT (Residential: Apartments) District to change the maximum by-right building length limitation to 300 feet. This amendment also includes a provision that this length may be exceeded to a maximum of 600 feet under certain conditions.

CB 35-2015 — B-1 Zoning District Amendment

This bill amends the Howard County Zoning Regulations' B-1 (Business: Local) District to add Commercial Schools as a permitted use.

CB 54-2014 — R-ED Zoning District Amendment

This bill amends the Howard County Zoning Regulations' R-ED (Residential: Environmental Development) District to add provisions concerning the use and subdivision of R-ED properties that contain Agricultural Land Preservation Easements.

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 2015.

CR 169-2015 — Clarksville Pike Streetscape Plan and Design Guidelines

This resolution adopts the Clarksville Streetscape Plan and Design Guidelines which will apply to new development or redevelopment in the Clarksville Pike/Route 108 corridor. (Note that this was delayed and passed in early 2016.)

CB 51-2015 — Design Advisory Panel - Clarksville Pike Streetscape Plan

This bill amends Title 16, Planning, Zoning and Subdivision and Land Development Regulations, stipulating that the Design Advisory Panel will provide advice on projects in certain additional Zoning Districts consistent with the Zoning Regulations including projects that are subject to the Clarksville Pike Streetscape Plan and Design Guidelines. The bill also

reorganizes the Panel's purpose and applicability sections, removes redundant language, clarifies certain principles of review, and makes certain technical corrections. (Note that this was delayed and passed in early 2016.)

CB 6-2015 — Timing of DPZ Technical Staff Reports

This bill amends Title 16, Planning, Zoning and Subdivision and Land Development Regulations, to clarify that the Department of Planning and Zoning is required to send their technical staff reports for any petitions considered by the Zoning Board, County Council, Planning Board, Hearing Examiner, or Board of Appeals to the appropriate decision making body and the general public at least two weeks prior to the required public hearing or meeting.

CR 104-2015 — Adopting the Housing Unit Allocation Chart

This resolution adopts the Housing Unit Allocation Chart for Fiscal Year 2016 pursuant to the Adequate Public Facilities Act of Howard County.

CR 105-2015 — Adopting the Open/Closed Schools Chart

This resolution adopts the Open/Closed Schools chart for Fiscal Year 2016 pursuant of the Adequate Public Facilities Act of Howard County to designate the school regions and school districts that are open for residential

Zoning Map Amendments

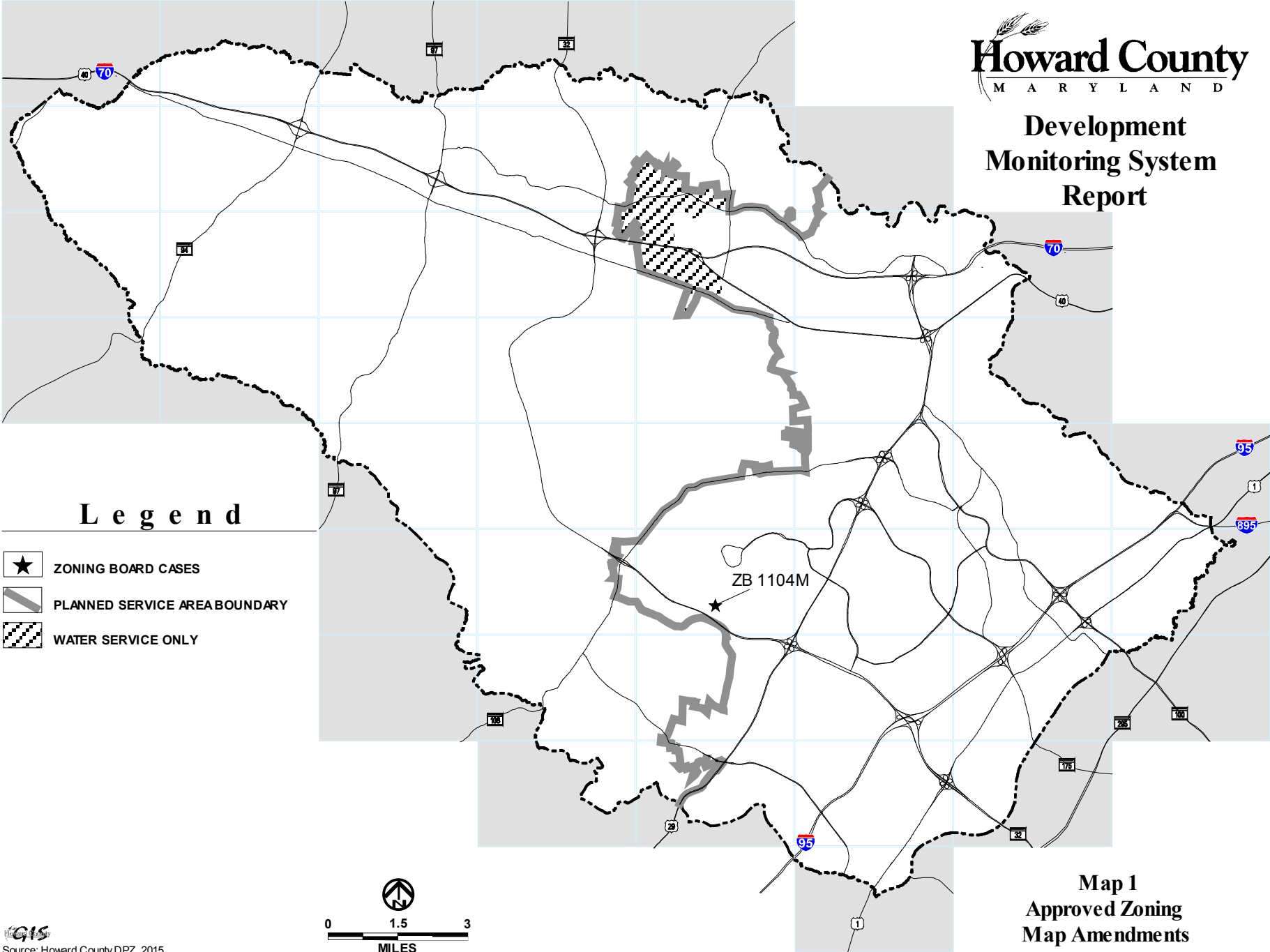
The following highlights all zoning map amendments including the amendment number, name, and description that were approved in Howard County during 2015. Map 1 shows the location of each. Note that in 2015, there was only one zoning map amendment.

ZB 1104M-2015 — Simpson Oaks

To rezone a 66.8 acre parcel of land located on the north side of Grace Drive, approximately 200 feet east of Quiet Night Ridge, with an address of 7600 Grace Drive, from PEC (Planned Employment Center) to CEF-R (Community Enhancement Floating-Residential).



Development Monitoring System Report



Legend

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

ZB 1104M

Source: Howard County DPZ, 2015.



Map 1 Approved Zoning Map Amendments

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2015, 7.12 miles of new or extended roadway were constructed in Howard County. These additions were built in 15 new subdivisions as part of developer's agreements executed with the County. A total of 0.13 miles of roadway was abandoned in 2015. Detailed information about all roadway construction projects is documented in Howard County's 2015 annual report to the State Highway Administration. The road additions are all shown on Map 2.

School Additions and Renovations

The Howard County Public School System completed two major renovations, a major addition along with a renovation, enhanced security features and new energy initiatives in the 2015 calendar year. The concentration of the renovation and expansion efforts continues to be within the priority funding area.

Longfellow Elementary School Renovation

Longfellow was originally constructed in 1970 and last renovated in 1987. The primary focus of the 2015 renovation was the conversion of the open space teaching pods into individual classrooms and the relocation of the administrative offices near the front entrance. Additionally, the health suite was upgraded to meet current standards.

Atholton High School Renovation

The renovation of Atholton High School was a complete modernization of the entire 52,000 square foot facility. All mechanical, electrical, and information technology systems were updated. The interior and exterior renovations provide for a more functional and modernized facility. The project was planned to achieve a Leadership in Energy and Environmental Design (LEED) Silver Certification.

Laurel Woods Elementary School Addition and Renovation

This project included a two-story classroom addition, expansion of the cafetorium and physical education activity area, and upgrades to the health center, kindergarten, music and art spaces. Emergency vehicle access has also been extended around the building.

Security Features

Comprehensive security renovations followed the recommendations of the 2013 Joint Task Force on school safety. Visitor access controls for all elementary and middle schools were installed. This includes security card access and camera-monitored authorization. Systemic improvements further secure the interior of school buildings during lockdowns. These security enhancements have been completed for all elementary and middle schools.

Energy Initiatives

Energy utilization improvements at six schools were completed in 2015: Bushy Park Elementary, Dayton Oaks Elementary, Veterans Elementary, Ellicott Mills Middle, Folly Quarter Middle, and Lime Kiln Middle. These improvements include upgrades to light fixtures and improved zone control for heating and cooling. These upgrades will save money and energy and qualify the school system to receive utility rebates.

Other Major Community Facilities and Infrastructure

In 2015, DPW Utilities initiated design and installation of 100% backup emergency power generation at the Little Patuxent Wastewater Treatment Plant (LPWTP), with final completion in 2016. The department also began design on a biosolids improvement project at the LPWTP, which is projected to reduce the volume of waste solids that are removed from the treatment facility by a factor of seven.

Design of new large diameter water mains on Little Patuxent Parkway and Broken Land Parkway are underway which will provide redundant water transmission mains and improved system performance well into the future.

New and improvements to wastewater pumping stations were completed on Washington Blvd. in Laurel and on Rockburn Hill Road in Elkridge.

The Central Maryland Regional Transit Facility was also completed in 2015. This 22,000 square foot \$14.8 million LEED Silver facility serves as a maintenance, fueling and storage location for transit buses and vehicles.

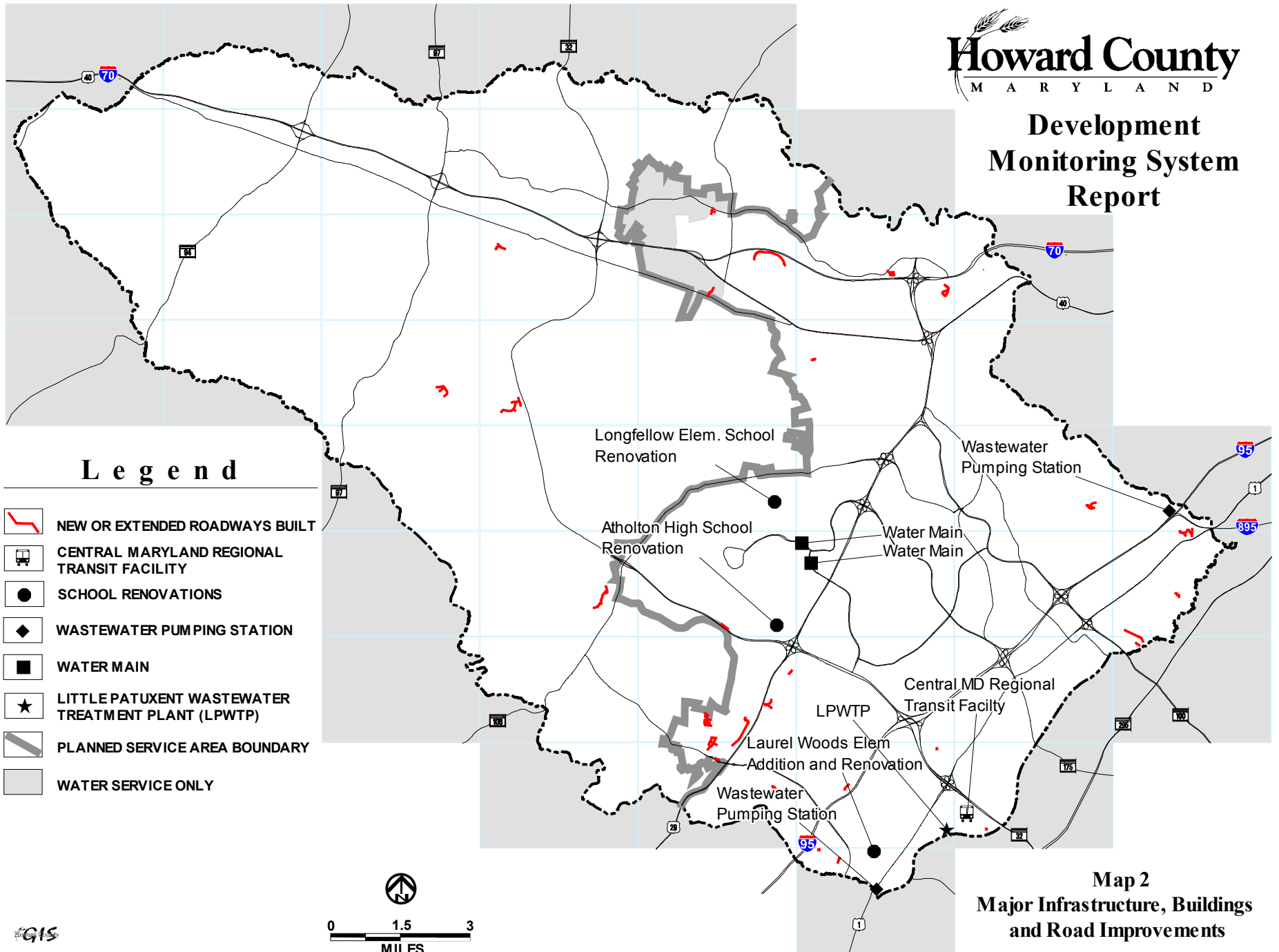
Consistency

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 2015 are located within the Priority Funding Area. Furthermore, the County Council approved the purchase of agricultural easements on five properties totaling more than 190 acres in the Rural West. Community Legacy and Neighborhood Revitalization financing approvals were also adopted, as well as the adoption of an amendment to PlanHoward 2030 recognizing the Patapsco Heritage Area Management Plan, a necessary step in the certification for this area to become Maryland’s 13th Heritage Area.

**Development
Monitoring System
Report**



Legend

-  NEW OR EXTENDED ROADWAYS BUILT
-  CENTRAL MARYLAND REGIONAL TRANSIT FACILITY
-  SCHOOL RENOVATIONS
-  WASTEWATER PUMPING STATION
-  WATER MAIN
-  LITTLE PATUXENT WASTEWATER TREATMENT PLANT (LPWTP)
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY



**Map 2
Major Infrastructure, Buildings
and Road Improvements**



Source: Howard County DPZ, 2015.

APFO Restrictions

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

The report is to include: 1) the location of the restriction, 2) the type of infrastructure affected by the restriction, 3) the proposed resolution of the restriction, if available, 4) the estimated date for the resolution of the restriction, if available, 5) if a restriction was lifted, the date the restriction was lifted, and 6) the resolution that lifted the restriction.

Overview of Howard County's APFO

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

Adoption of the Adequate Public Facilities Act (commonly known as APFO) in 1992 has allowed the County to effectively manage the amount and distribution of residential growth in accordance with growth policy set by the General Plan. Prior to adoption of APFO, the County was averaging more than 3,000 new houses per year. This rate was reduced by about half since the adoption of the 2000 General Plan, which establishes the annual number of housing unit allocations for new homes that can move through the development process. The recent adoption of PlanHoward 2030 maintains this lower pace of growth. Also part of APFO is the Open/Closed Schools Test, which limits construction in areas of the County facing school overcrowding, and the adequate roads test which determines necessary road improvements.

Allocation Restrictions in 2015

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

At the end of 2015, there were no residential subdivisions delayed due to allocation limitations. The Allocations chart, which must be approved by the County Council, is adopted each July. The current chart was adopted on July 7, 2015. Under Howard County's latest General Plan, PlanHoward 2030, allocations are now distributed in this adopted chart by Designated Place Type, and no projects were in the waiting bin for allocations in each of these designated areas at the end of 2015.

Prior to the adoption of this latest chart in July 2015, there were 484 units in 26 subdivision plans on hold in the Established Communities area and 1 unit on hold in the Rural West. All of these projects received allocations when the new chart was adopted, and then each project took the Open/Closed Schools test. Of the 484 units in the Established Communities area (which is within the PFA), 405 passed the Open/Closed Schools test and 30 units in 7 subdivision plans failed the Open/Closed Schools test. The 1 planned unit in the Rural West passed the Open/Closed Schools test.

Closed School Restrictions in 2015

As indicated above, after a development project receives allocations, it then takes the Open/Closed Schools test. To pass this test the elementary school district, the elementary school region, and the middle school district where the project is located all must be under 115% capacity. Howard County has 41 elementary schools and 18 middle schools, each in their own district. The elementary schools are divided up into six elementary school regions.

At the end of 2015 there were 5 closed elementary school districts (Cardlerock, Veterans, Centennial Lane, St. Johns Lane, and Fulton) and 4 closed middle school districts (Harpers Choice, Ellicott Mills, Dunloggin, and Patapsco). This results in a total of 186 units in 7 subdivision plans on hold due to closed elementary school districts and an additional 110 units in 14 subdivision plans on hold due to closed middle school districts.

A new elementary school is under construction in Elkridge near the Oxford Square development. It is scheduled to open in the fall of 2017 and will help to increase elementary school capacity in the northeast part of the county. Planned additions to Dunloggin and Ellicott Mills middle schools will add additional middle school capacity.

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 2015. 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*. As indicated, this is not how one typically considers density, which normally includes open and common space and roads and other amenities that are always included as part of a new development. For example, the *lot density* in Downtown Columbia reported here is about 88 units per acre. This is simply derived by dividing the 380 units in the new Metropolitan building built next to the Columbia Mall by the 4 acre lot size that the building resides on.

Lot Density by Planning Area

Table 1 shows the lot density of residential development in 2015 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 2015, but the project is to include more than one building, then that project and associated density is not counted in the current year. It will be counted in a future year when the entire project is finished. This also applies to rental and condo apartments and condo townhomes.

The greatest average lot density occurred in Downtown Columbia at 87.96 units per acre based on 380 units built. This was followed by Elkridge at 21.69 units per acre, Ellicott City at 19.23 units per acre, the Southeast at 14.47 units per acre, and the rest of Columbia at 11.85 units per acre. The Rural West, as expected, had the lowest average lot density at 0.87 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 35.03 units per acre. This compares to a much smaller lot density of 0.87 units per acre outside the PFA.

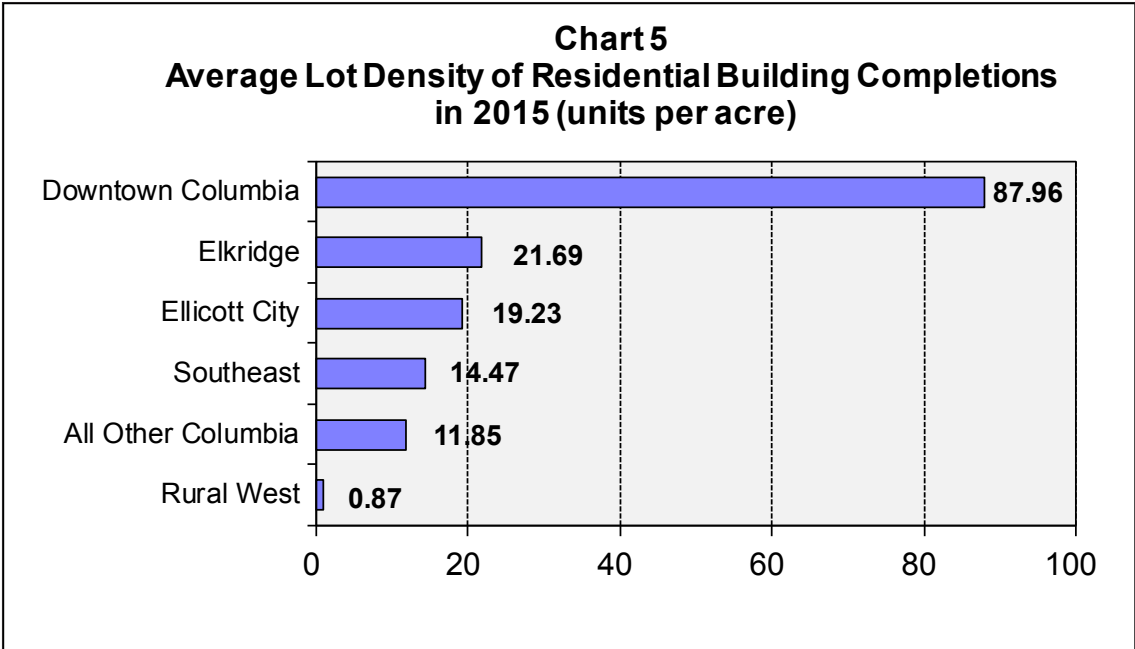
Map 3 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2015 - By Planning Area

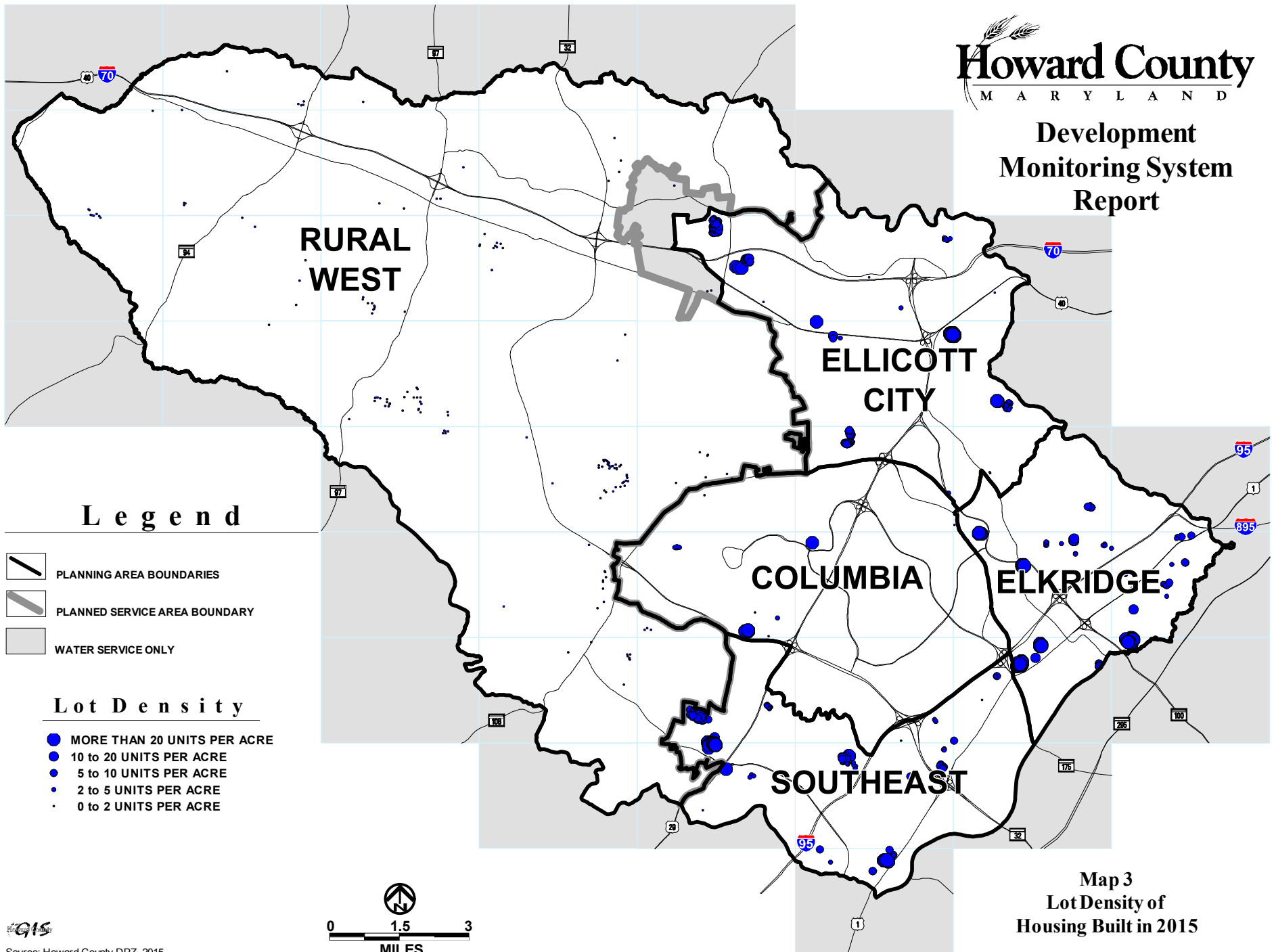
Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Downtown Columbia	380	22%	4	1%	87.96
All Other Columbia	24	1%	8	1%	11.85
Elkridge	305	18%	28	5%	21.69
Ellicott City	457	26%	48	8%	19.23
Rural West	158	9%	420	74%	0.87
Southeast	402	23%	58	10%	14.47
TOTAL	1,726	78%	566	99%	31.90

Table 2
Lot Density of Total Units Built in 2015 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,568	91%	146	26%	35.03
Outside PFA	158	9%	420	74%	0.87
TOTAL	1,726	100%	566	100%	31.90



**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 from 2015 to 2030. A total of 1,500 new units are allocated to areas outside the PFA, representing only 4.8% of all units countywide. The remaining 95.2% of future units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2015 unit counts, 12.2% of all housing units in the County are outside the PFA. The remaining 87.8% are inside the PFA. This is summarized in Table 4.

Comparing this to the PlanHoward 2030 policy of allocating only 4.8% 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 the sum of total units currently built plus those newly allocated by 2030. The percentage of total units outside the PFA will decrease between now and then, from 12.2% currently to 10.7% in 2030.

Table 3
PlanHoward 2030 Growth Projections
2015 to 2030

Inside PFA	29,600	95.2%
Outside PFA	1,500	4.8%
Total	31,100	100.0%

Table 4
Total Built Units in Howard County
September 30, 2015

Inside PFA	100,812	87.8%
Outside PFA	14,046	12.2%
Total	114,858	100.0%

Table 5
Total Units by 2030 based on PlanHoward 2030

Inside PFA	130,412	89.3%
Outside PFA	15,546	10.7%
Total	145,958	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 2015 were recorded or in existence prior to 2011, 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, 2015 through December 31, 2015, there was potential for 908 housing units from recorded lots countywide in 100 subdivision plans totaling 2,750 acres (Table 6). Ellicott City had the most with 345 units, 38% of the total. Elkrige had 296 units, 33% of the total. The Southeast had potential for 144 units, 16% of the total. There were 111 units in recorded subdivision plans in the Rural West (12%) and 12 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 and apartment units are included in the unit total for large parcel recordations.

Of the total 2,750 acres recorded, 2,138 acres, or about 78%, 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.

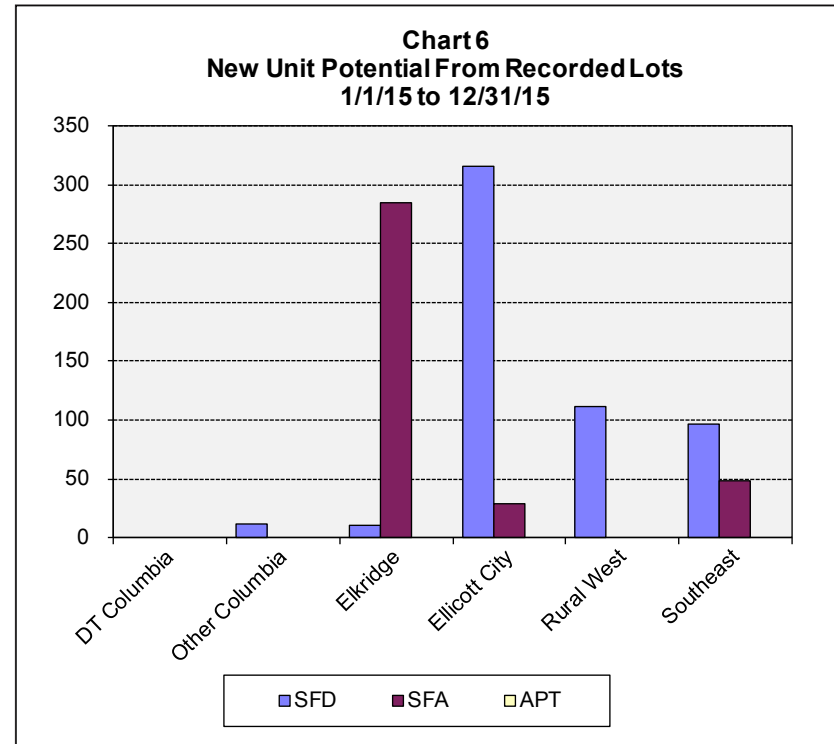
Table 7 shows new units from recorded lots by unit type. Of the 908 units from recorded lots, 546 are for single family detached units (SFD) and 368 are for single family attached or townhouse units (SFA). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions in 2015

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	12	1%	7	7%	80	3%
Elkridge	296	33%	20	20%	97	4%
Ellicott City	345	38%	22	22%	344	13%
Rural West	111	12%	33	33%	2,138	78%
Southeast	144	16%	18	18%	91	3%
TOTAL	908	100%	100	100%	2,750	100%

Table 7
Unit Potential from Recorded Lots by Unit Type in 2015

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	11	285	0	0	296	33%
Ellicott City	316	29	0	0	345	38%
Rural West	111	0	0	0	111	12%
Southeast	96	48	0	0	144	16%
TOTAL	546	362	0	0	908	100%
PERCENT	60%	40%	0%	0%	100%	



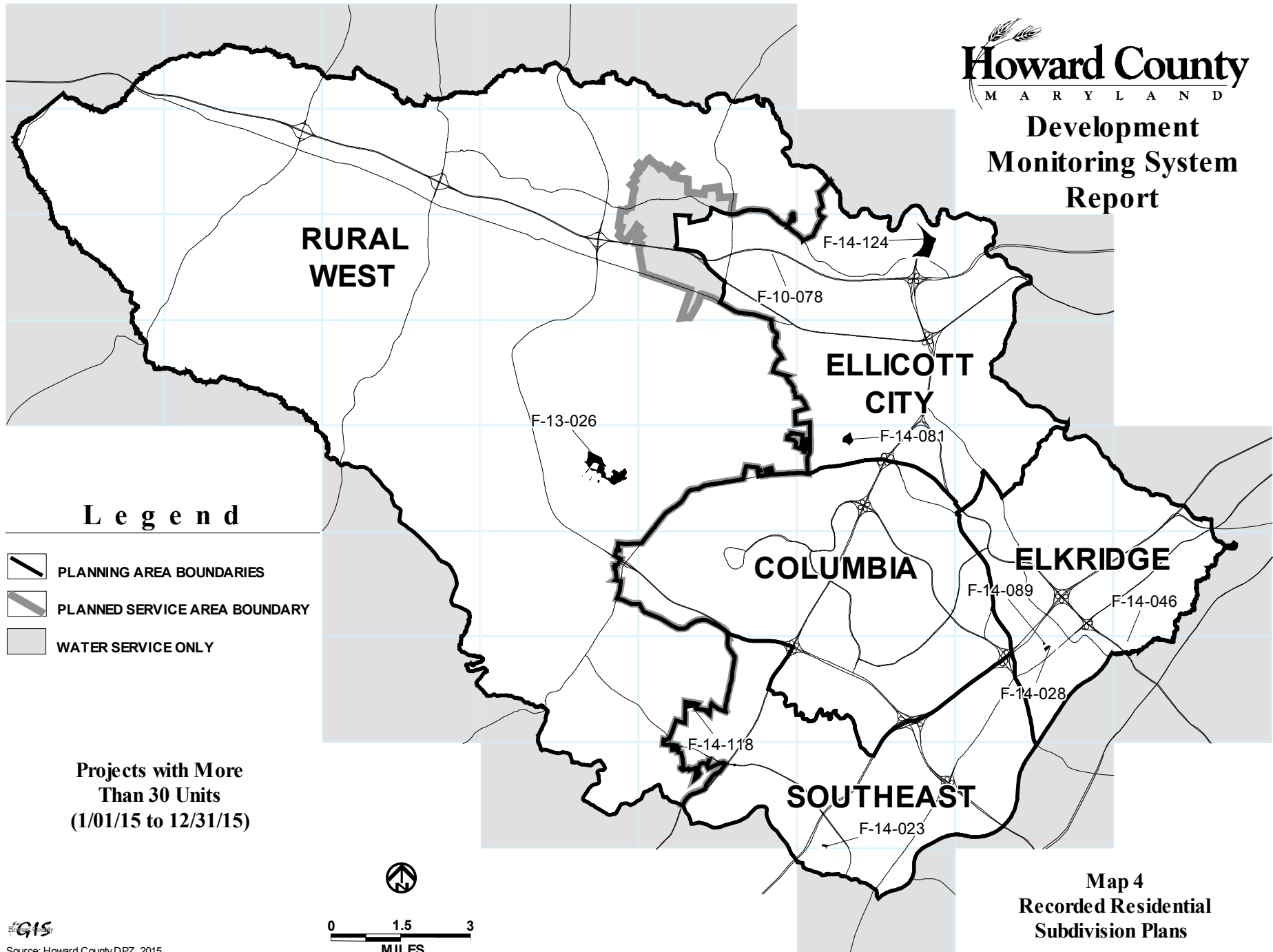
Last Year's Projects - Greater than 30 Units

Of the total 908 units from lots recorded for the latest reporting period, 730 or about 80% were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 8, are located in four planning areas. The precise location of these plans are shown on Map 4.

These larger plans include Blue Stream Section 2, Oxford Square and Morris Place in Elkridge; the Estates at Patapsco Park, Centennial Lake Overlook Section 2, and the Villages at Turf Valley in Ellicott City; Walnut Creek in the Rural West; and High Ridge Meadows Section 2 and another portion of Maple Lawn Farms in the Southeast.



Development Monitoring System Report



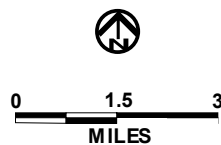
Legend

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

**Projects with More
Than 30 Units
(1/01/15 to 12/31/15)**



Source: Howard County DPZ, 2015.



**Map 4
Recorded Residential
Subdivision Plans**

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 30 Units in 2015

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-14-089	Blue Stream Towns - Section 2	SFA - 19 MIHU	105	254
	F-14-046	Oxford Square	SFA - 14 MIHU	96	
	F-14-028	Morris Place	SFA - 8 MIHU	53	
Ellicott City	F-14-124	Estates at Patapsco Park	SFD	195	311
	F-14-081	Centennial Lake Overlook, Section 2	SFD	68	
	F-10-078	Villages at Turf Valley	SFD	48	
Rural West	F-13-026	Walnut Creek - Phase 3	SFD	45	45
Southeast	F-14-023	High Ridge Meadows - Section 2	SFD, SFA	75	120
	F-14-118	Maple Lawn Farms	SFD	45	
TOTAL					730

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in 2011. Over this time period lots for 5,856 units countywide in 497 subdivision plans totaling 11,507 acres were recorded. This equates to an annual average of 1,171 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 2,205 single family detached units, 38% of the total 5,856. A total of 1,873, 32%, were for single family attached units and the remaining 1,778, 30%, were for apartments units (rental and condo).

Table 9
Recorded Residential Subdivision, 2011 to 2015

Year	Units	Plans	Acreage
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
1/15 to 12/15	908	100	2,750
TOTAL	5,856	497	11,507
ANNUAL AVG.	1,171	99	2,301

Table 10
Unit Potential From Recorded Lots by Unit Type, 2011 to 2015

Year	SFD	SFA	APT	MH	Total
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
1/15 to 12/15	546	362	0	0	908
TOTAL	2,205	1,873	1,778	0	5,856
PERCENT	38%	32%	30%	0%	100%
ANNUAL AVG.	441	375	356	0	1,171

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, 2015 are tabulated and compared with those in process the prior year (as of December 31, 2014).

Number of Plans

There were slightly more residential plans in process as of December 31, 2015 than there were one year earlier – 174 plans in 2015 compared to 165 in 2014 (Table 11).

For the current year, Ellicott City had the greatest number of residential plans in process with 61, followed by the Rural West with 37, Elkrige with 32, the Southeast with 26, Columbia with 16 and Downtown Columbia with 2.

Of the 174 plans in process on December 31, 2015, 93 were final plans, 42 were environmental concept plans, 21 were sketch plans, 16 were preliminary equivalent sketch plans and 2 were preliminary plans.

Number of Potential Units

There were 98 less units in process on December 31, 2015 compared to the previous year – 9,241 units compared to 9,339 units (Table 12).

It is important to note that a significant number of the 9,241 units in process are part of phased projects with building planned for future years.

Table 11
Number of Residential Subdivision Plans in Process, 12/31/15
(With comparisons to Countywide total as of 12/31/14)

Planning Area	Environmental		Preliminary Equivalent		Final	TOTAL PLANS
	Concept	Sketch	Sketch	Preliminary		
Downtown Columbia	0	0	0	0	2	2
All Other Columbia	2	2	1	0	11	16
Elkrige	8	7	1	2	14	32
Ellicott City	14	8	7	0	32	61
Rural West	13	0	5	0	19	37
Southeast	5	4	2	0	15	26
TOTAL	42	21	16	2	93	174
As of 12/31/14	35	17	18	2	93	165

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, 7,786 units are part of phased plans, with building planned as far out as 2026. Phased plans represent 84% 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, Elkrige Crossing, Morris Place, and the Park at Locust Thicket in Elkrige; 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, 16% of the units in process are single family detached units. About 18% are single family attached units and 66% 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, 12/31/15
 (With comparisons to Countywide total as of 12/31/14)

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	283	126	0	0	409
Elkridge	85	636	2,187	0	2,908
Ellicott City	535	747	482	0	1,764
Rural West	249	0	0	0	249
Southeast	312	172	1,127	0	1,611
TOTAL	1,464	1,681	6,096	0	9,241
PERCENT	16%	18%	66%	0%	100%
As of 12/31/14	1,679	1,367	6,293	0	9,339

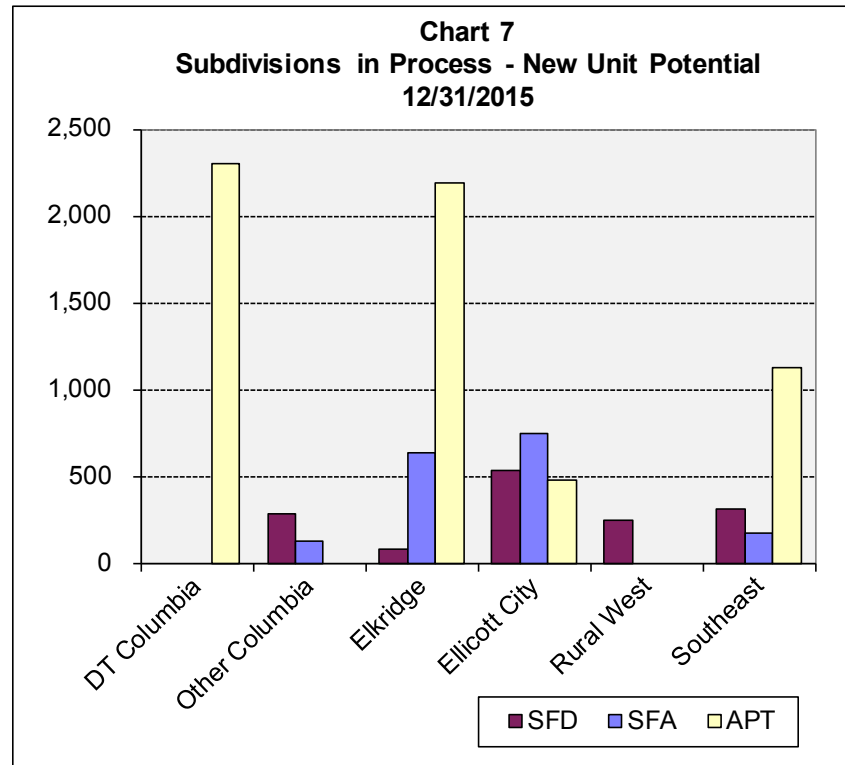


Table 13
Potential Units from Phased Projects in Process, 12/31/15

Planning Area	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	TOTAL
Downtown Columbia	0	0	300	300	300	300	300	300	300	200	0	2,300
All Other Columbia	0	0	48	70	30	0	0	0	0	0	0	148
Elkridge	213	547	610	678	481	150	0	0	0	0	0	2,679
Ellicott City	0	175	207	225	218	148	143	141	150	0	0	1,407
Southeast	0	421	254	250	250	0	0	0	0	0	32	1,207
Rural West	45	0	0	0	0	0	0	0	0	0	0	45
TOTAL	258	1,143	1,419	1,523	1,279	598	443	441	450	200	32	7,786

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, 12/31/15

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	109	81	0	0	190	100	0	0	0	100
Elkridge	19	377	2,187	0	2,583	0	77	0	0	77
Ellicott City	95	413	482	0	990	278	63	0	0	341
Rural West	0	0	0	0	0	117	0	0	0	117
Southeast	41	156	844	0	1,041	126	0	0	0	126
TOTAL	264	1,027	3,513	0	4,804	621	140	0	0	761

Planning Area	Preliminary					Final					TOTAL - 12/31/15				
	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	74	45	0	0	119	283	126	0	0	409
Elkridge	0	65	0	0	65	66	117	0	0	183	85	636	2,187	0	2,908
Ellicott City	0	0	0	0	0	162	271	0	0	433	535	747	482	0	1,764
Rural West	0	0	0	0	0	132	0	0	0	132	249	0	0	0	249
Southeast	0	0	0	0	0	145	16	283	0	444	312	172	1,127	0	1,611
TOTAL	0	65	0	0	65	579	449	2,583	0	3,611	1,464	1,681	6,096	0	9,241

Number of Acres

As of December 31, 2015 a total of 3,616 acres of residential land were in the subdivision process. This is 305 more acres compared to the previous year, at which time there were 3,311 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, Simpson Oaks, The Enclave at Tierney Farm, Oxford Square, The Overlook at Blue Stream, The Park at Locust Thicket, Turf Valley, Westmount and Laurel Park Station. These major projects with 50 or more units total 8,189 units which account for about 89% of the total 9,241 units in the subdivision process.

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

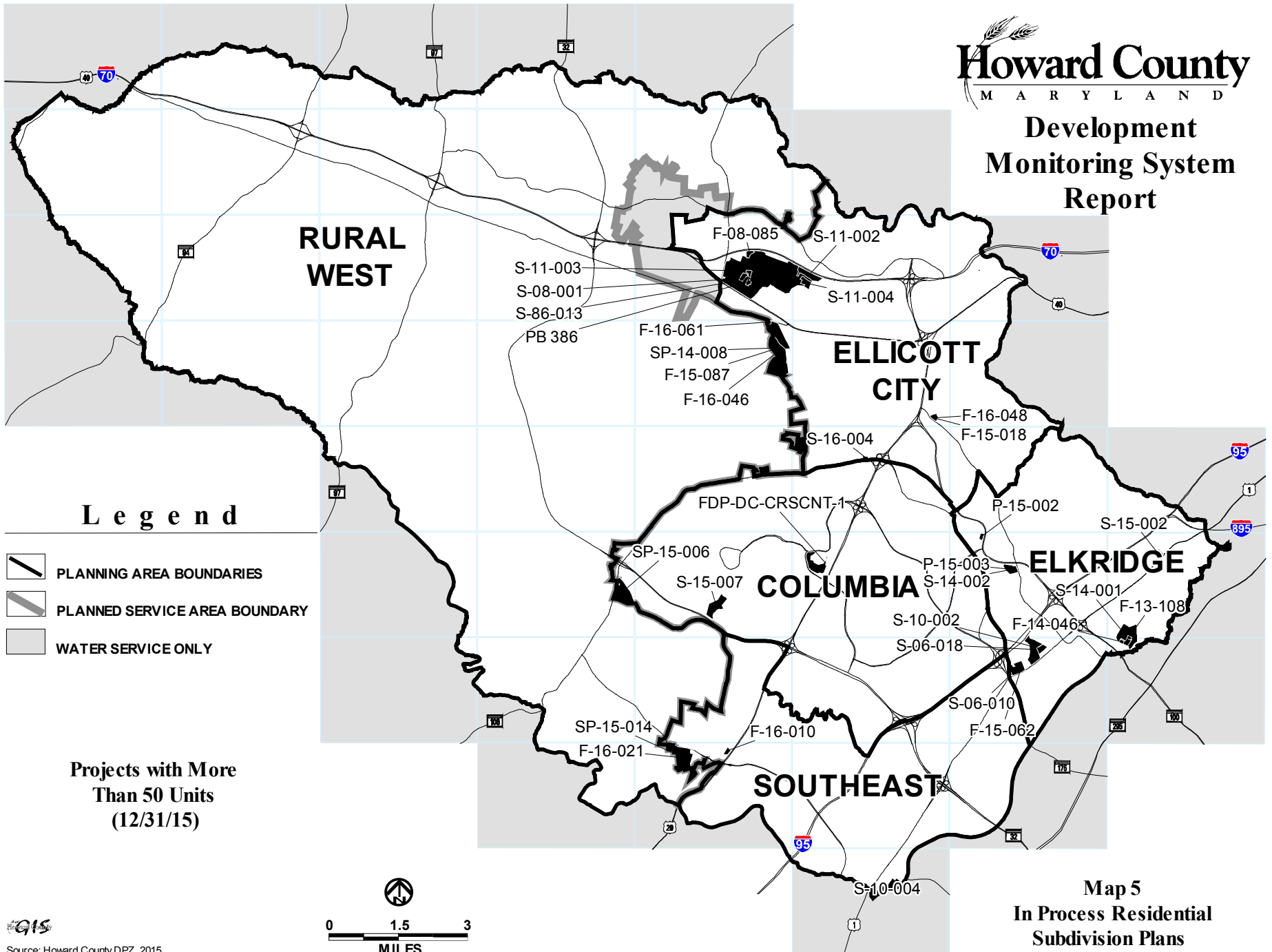
Planning Area	Preliminary Equivalent				TOTAL ADRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	169	169
All Other Columbia	69	89	0	232	390
Elkridge	245	12	37	153	447
Ellicott City	101	301	0	593	996
Rural West	0	366	0	908	1,274
Southeast	52	100	0	190	341
TOTAL	467	867	37	2,245	3,616
As of 12/31/14	489	796	90	1,936	3,311

Table 16
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 12/31/15




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	S-15-007	Simpson Oaks	SFD, SFA - 19 MIHU	184	284
	SP-15-006	Enclave at Tierney Farm - Phase 2 & 3	SFD	100	
Elkridge	S-14-001, F-13-108, F-14-046	Oxford Square - Remaining Phases	APT - 151 MIHU	1,005	2,712
	S-06-018	The Overlook at Blue Stream - Remaining Phases	APT - 98 MIHU	668	
	S-14-002, P-15-003	The Park at Locust Thicket	APT - 50 MIHU	387	
	S-06-010, F-15-062	Howard Square - Remaining Phases	SFA, APT - 62 MIHU	366	
	S-15-002	Elkridge Crossing - Remaining Phases	SFA	142	
	S-10-002	Morris Place - Remaining Phase	SFA - 15 MIHU	79	
	P-15-002	Shipley's Grant	SFA - 7 MIHU	65	
Ellicott City	S-86-013, PB 386	Turf Valley - Remaining Phases	SFA, APT	520	1,435
	F-15-087, F-16-046, 061, SP-14-008	Westmount	SFD	325	
	S-08-001	Turf Valley Clubhouse	SFD, SFA, APT	128	
	S-11-002	The Bluffs at Turf Valley	APT	114	
	S-16-004	Dorsey Overlook	SFD, SFA	83	
	F-15-018, F-16-048	Long Gate Overlook	SFA	79	
	S-11-004	Turf Valley - Pod E	SFD, SFA	74	
	F-08-85	Villages at Turf Valley - Phase 3	SFA	59	
	S-11-003	Turf Valley Clubhouse 2	SFD, SFA	53	
Southeast	S-10-004	Laurel Park Station - All Phases	APT, SFA - 150 MIHU	1,000	1,458
	F-16-010	The Vine - Buch Apartments	APT - 43 MIHU	283	
	F-16-021, SP-15-014	Maple Lawn South, Phases 1 & 2	SFD	175	
TOTAL					8,189



Development Monitoring System Report



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-  PLANNING AREA BOUNDARIES
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-  WATER SERVICE ONLY

Projects with More Than 50 Units (12/31/15)



Source: Howard County DPZ, 2015.

Map 5
In Process Residential Subdivision Plans

Approved Residential Site Development Plans

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

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

Summary of Latest Reporting Period

From 01/01/2015 thru 12/31/2015 there were 1,652 housing units approved in 46 site development plans totaling about 207 acres (Table 17). Elkridge had 521 approved units followed by Downtown Columbia with 437 units, the Southeast with 356, Ellicott City with 319, and the remainder of Columbia with 19.

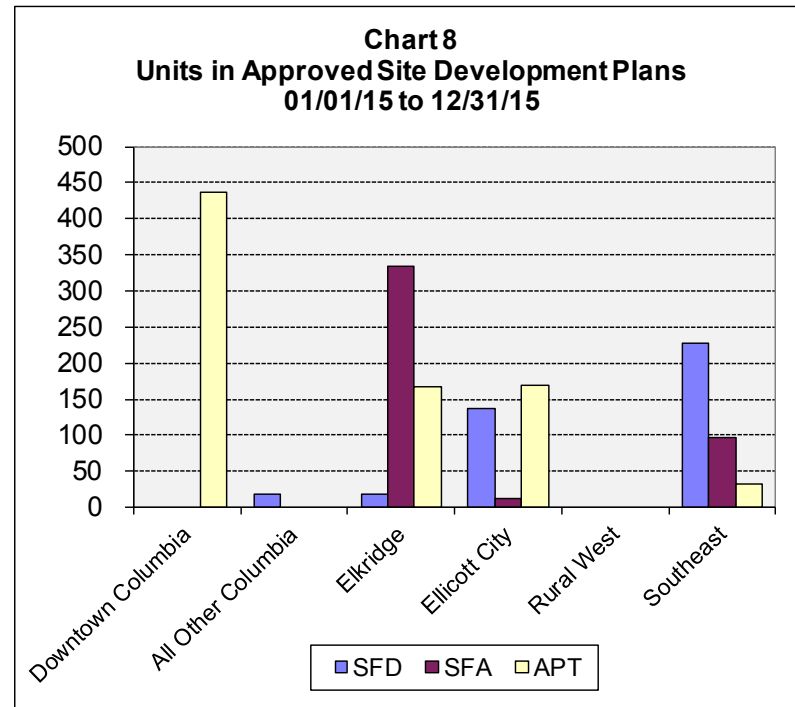
Table 18 shows new units from approved site development plans by unit type. Of the 1,652 approved units, 24% were for single family detached units, 27% were for single family attached units and 49% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 17
Approved Residential Site Development Plans in 2015

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	437	26%	1	2%	5	2%
All Other Columbia	19	1%	7	15%	8	4%
Elkridge	521	32%	13	28%	60	29%
Ellicott City	319	19%	9	20%	45	22%
Rural West	0	0%	1	2%	5	2%
Southeast	356	22%	15	33%	83	40%
TOTAL	1,652	74%	46	98%	207	98%

Table 18
Approved Units in SDP's by Unit Type in 2015

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	437	0	437	26%
All Other Columbia	19	0	0	0	19	1%
Elkridge	19	334	168	0	521	32%
Ellicott City	137	13	169	0	319	19%
Rural West	0	0	0	0	0	0%
Southeast	227	97	32	0	356	22%
TOTAL	402	444	806	0	1,652	74%
PERCENT	24%	27%	49%	0%	100%	



Last Year's Projects - Greater than 30 Units

Of the total 1,652 units approved in site development plans last year, 1,475 or about 89% 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 January 1, 2011 to December 31, 2015. Over this five year period 8,091 units were approved countywide in 270 site development plans totaling 1,269 acres.

Table 19
Approved Residential SDP's, Projects With More Than 30 Units in 2015

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-14-024	Warfield Neighborhood, Parcel C	APT	437	437
Elkridge	SDP-14-077	Brompton House (Blue Stream)	SFA, APT - 36 MIHU	193	489
	SDP-14-029	Blue Stream Towns, Section 2	SFA - 19 MIHU	105	
	SDP-14-019	Oxford Square	SFA - 15 MIHU	96	
	SDP-15-017	Morris Place	SFA - 8 MIHU	53	
	SDP-14-071	Oxford Square	SFA - 7 MIHU	42	
Ellicott City	SDP-14-090	The Gatherings at Ellicotts Retreat	Age-Restricted APT	162	280
	SDP-15-040, SDP-15-066	Centennial Lake Overlook	SFD	70	
	SDP-15-014	Villages at Turf Valley, Ph. 2 Sec. 2	SFD	48	
Southeast	SDP-15-015	High Ridge Meadows, Sec. 2	SFD, SFA	75	269
	SDP-14-087	Wincopia Farms	SFD	59	
	SDP-14-081	High Ridge Meadows, Sec. 1	SFD	54	
	SDP-15-027	Wincopia Farms	SFA	49	
	SDP-15-001	Cherrytree Park	Age-Restricted APT, 4 MIHU	32	
TOTAL					1,475

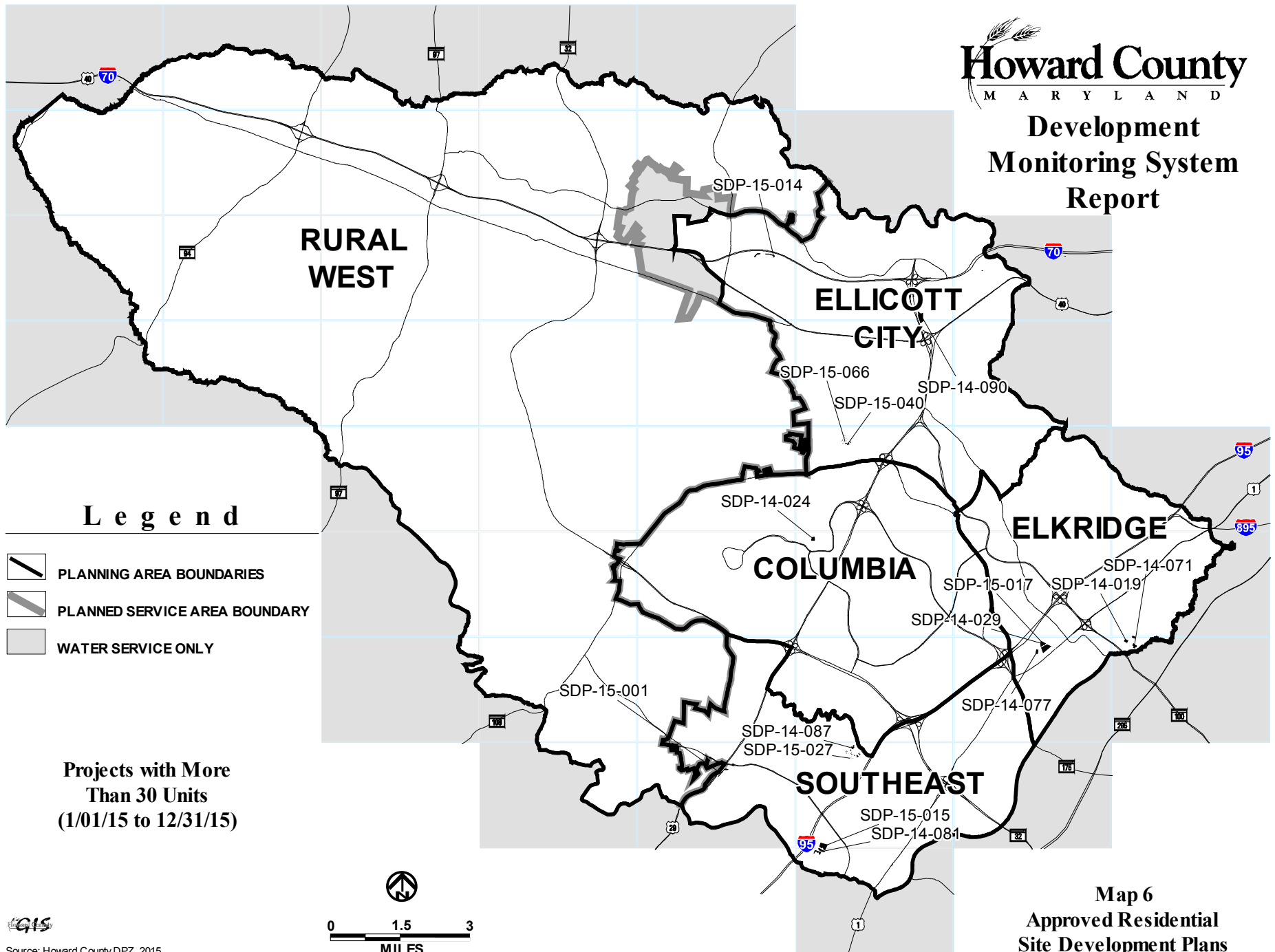
Table 20
Approved Units in Residential Site Development Plans, 2011 to 2015

Year	SFD	SFA	APT	MH	Total
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
1/15 to 12/15	402	444	806	0	1,652
TOTAL	1,807	2,293	3,991	0	8,091
PERCENT	22%	28%	49%	0%	100%
ANNUAL AVG.	361	459	798	0	1,618




Table 21
Approved Residential Site Development Plans, 2011 to 2015

Year	Units	Plans	Acreage
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 12/14	1,883	71	278
1/15 to 12/15	1,652	46	207
TOTAL	8,091	270	1,269
ANNUAL AVG.	1,618	54	254

**Development
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-  PLANNING AREA BOUNDARIES
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**Projects with More
Than 30 Units
(1/01/15 to 12/31/15)**



Source: Howard County DPZ, 2015.



**Map 6
Approved Residential
Site Development Plans**

In-Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of plans, potential units and acreage currently being processed as of December 31, 2015 are tabulated and compared to those in process a year earlier (as of December 31, 2014). 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 was 1 less residential site development plans in process as of December 31, 2015 compared to the prior reporting period, 32 plans compared to 33 plans (Table 22).

Table 22
Number of Residential SDP's In Process, 1/1/15 & 12/31/14

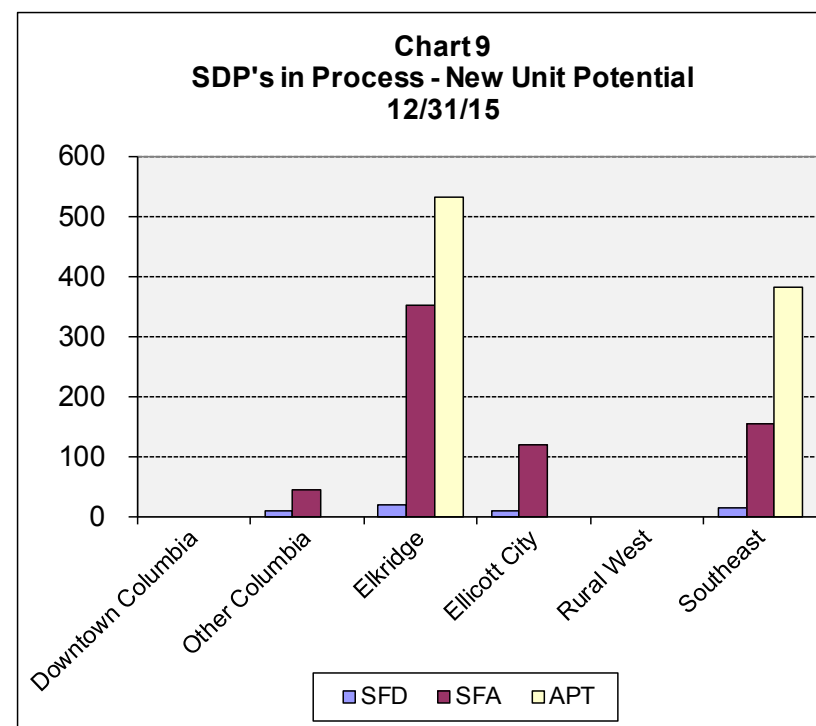
Planning Area	2015	2014
Downtown Columbia	0	1
All Other Columbia	4	1
Elkridge	13	15
Ellicott City	7	8
Rural West	2	0
Southeast	6	8
TOTAL	32	33

Number of Potential Units

There were 241 less units in process as of December 31, 2015 compared to December 31 of the previous year, 1,641 units compared to 1,882 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 915 proposed units in 2015. This is followed by 673 proposed single family attached or townhouse units and 53 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, 12/31/15
(With comparisons to Countywide total as of 12/31/14)

Planning Area	Single Family		Apartments	Mobile Homes	TOTAL UNITS
	Detached	Attached			
Downtown Columbia	0	0	0	0	0
All Other Columbia	11	45	0	0	56
Elkridge	19	352	533	0	904
Ellicott City	9	120	0	0	129
Rural West	0	0	0	0	0
Southeast	14	156	382	0	552
TOTAL	53	673	915	0	1,641
As of 12/31/14	227	811	844	0	1,882



Number of Acres

As of December 31, 2015 a total of 441 acres of residential land were in the site development plan process. This is more than the previous year when there were 214 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 1,641 units in the site development plan process, 1,543 or about 94% were in projects with more than 30 units.

These large projects include Howard Square, Oxford Square and Morris Place in Elkridge; Long Gate Overlook and Fairways at Turf Valley in Ellicott City; and The Vine, Laurel Park Station and the Day Resource Center in the Southeast.

Table 24
Acreeage of Residential SDP's In Process, 12/31/15 & 12/31/14

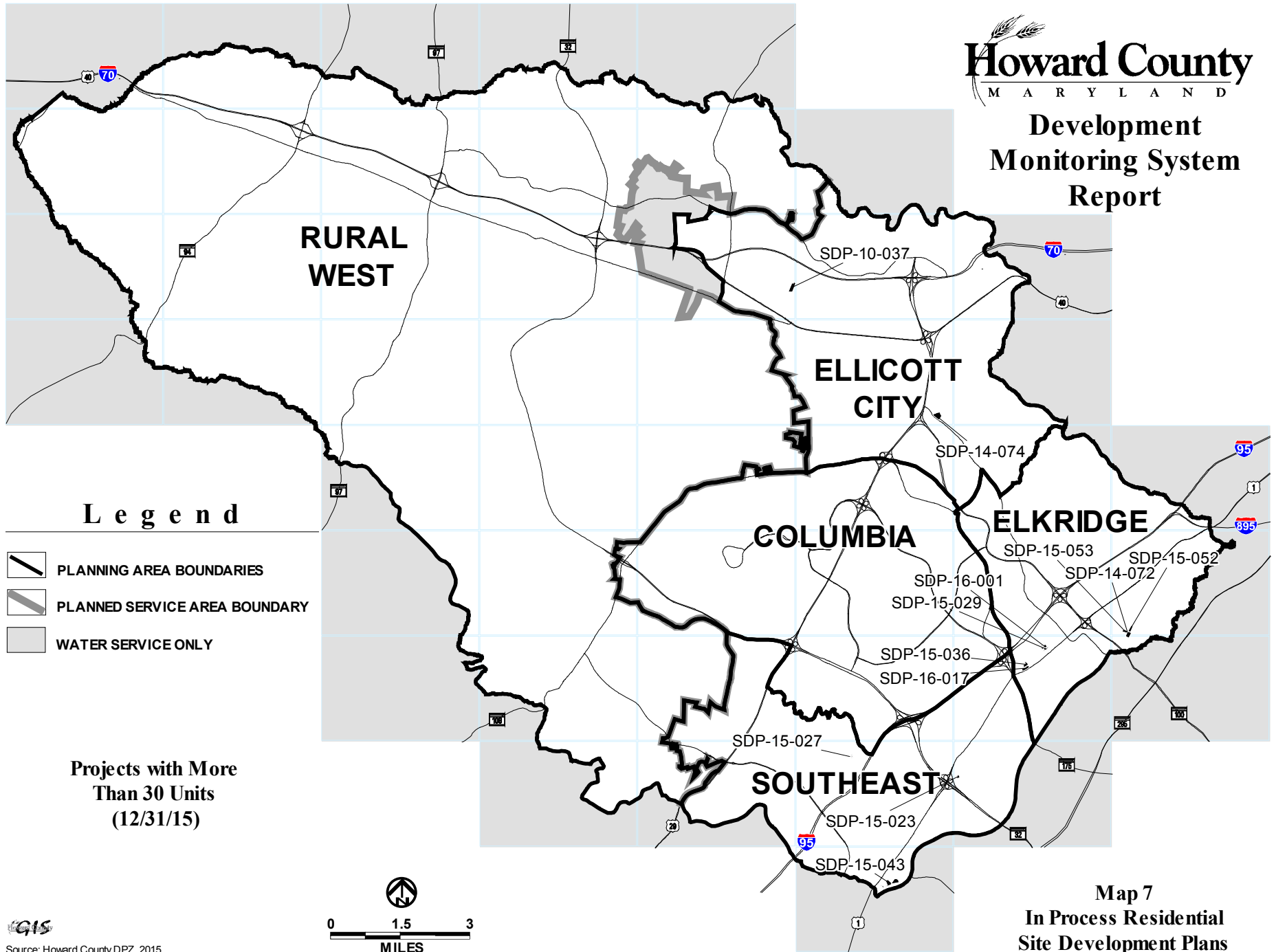
Planning Area	2015	2014
Downtown Columbia	0	5
All Other Columbia	11	0.5
Elkridge	35	66
Ellicott City	147	66
Rural West	216	0
Southeast	31	76
TOTAL	441	214

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/15




Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	SDP-16-017	Howard Square	APT - 42 MIHU	283	885
	SDP-15-053	Oxford Square, Parcel X	APT - 29 MIHU	190	
	SDP-14-072	Oxford Square, Parcel Y	SFA - 24 MIHU	156	
	SDP-15-036	Howard Square	SFA - 20 MIHU	83	
	SDP-16-001	Moris Place	SFA - 11 MIHU	79	
	SDP-15-052	Oxford Square, Parcel A-A	APT - 9 MIHU	60	
	SDP-15-029	Morris Place	SFA - 5 MIHU	34	
Ellicott City	SDP-14-074	Long Gate Overlook	SFA - 8 MIHU	73	120
	SDP-10-037	Fairways at Turf Valley, Phase 1	SFA	47	
Southeast	SDP-15-027	The Vine - Buch Apartments	APT - 43 MIHU	283	538
	SDP-15-043	Laurel Park Station	SFA, APT - 33 MIHU	220	
	SDP-15-023	Day Resource Center	APT	35	
TOTAL					1,543

Howard County M A R Y L A N D

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Projects with More
Than 30 Units
(12/31/15)



Source: Howard County DPZ, 2015.



Map 7
In Process Residential
Site Development Plans

Residential Building Permits & Use and Occupancy Permits

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

Issued Building Permits

Summary of Last Year

From January 1, 2015 to December 31, 2015, the County issued 1,620 residential building permits for new construction (Table 26). Elkridge had the greatest number issued with 614, followed by Ellicott City with 331 and then the Southeast with 302. Countywide, 30% of the permits were for apartment units (both rental and condo). About 32% were for single family detached units and 39% for single family attached units. Chart 10 shows these results graphically by planning area.

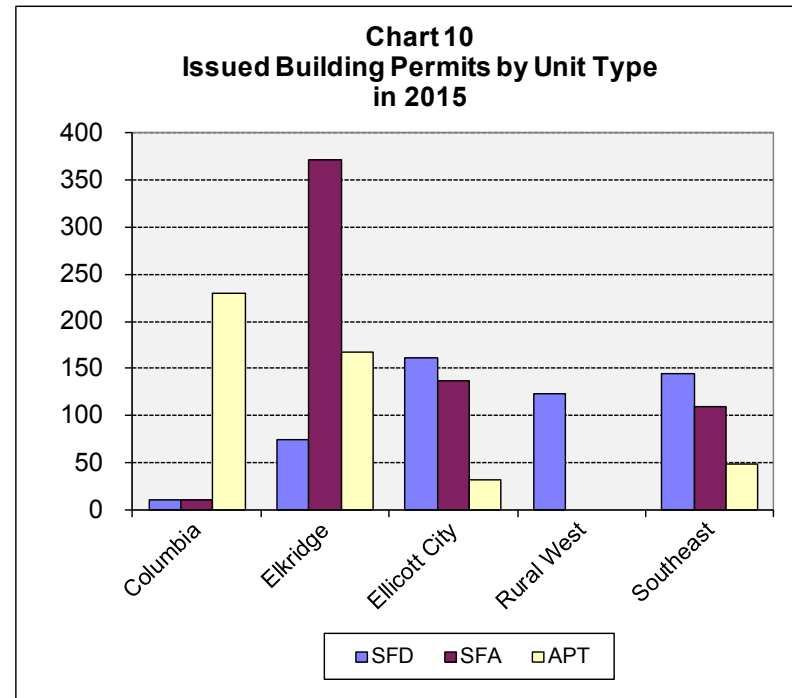


Table 26
Issued Residential Building Permits by Unit Type in 2015

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	10	10	230	0	250	15%
Elkridge	74	372	168	0	614	38%
Ellicott City	162	137	32	0	331	20%
Rural West	123	0	0	0	123	8%
Southeast	145	109	48	0	302	19%
TOTAL	514	628	478	0	1,620	100%
PERCENT	32%	39%	30%	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 1,210 of the total 1,620 permits issued last year, fall into this category. Map 8 shows the locations of each of the developments.

Five Year Results

Over five years, from 2011 to 2015, a total of 8,224 residential permits have been issued in Howard County (Table 28). This is an average of 1,645 permits per year. Last year's 1,620 issued permits was 11% more than the 1,453 permits issued the year before and third highest since 2011.

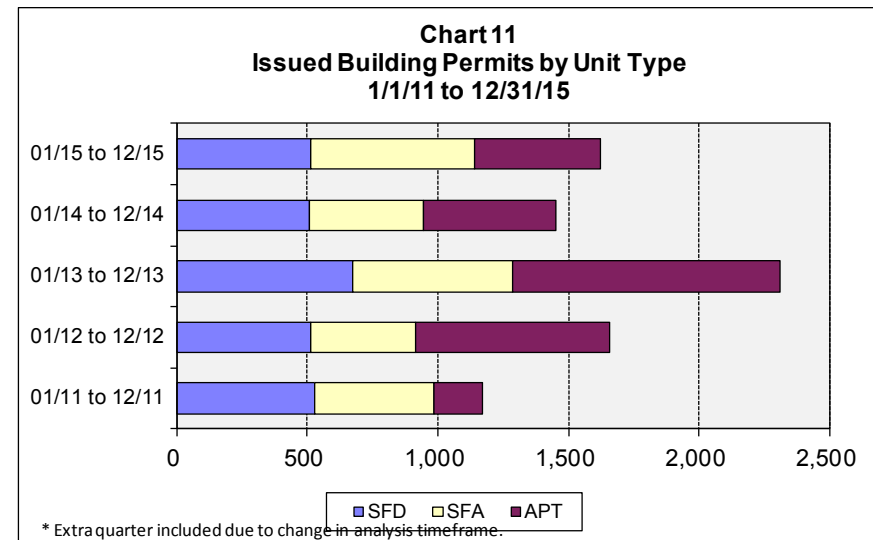
Of the 8,224 total permits issued over the 5 year time period, 2,736, or 33%, were for single family detached units. There were 2,534 permits (31%) for single family attached units and 2,941 permits (36%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

Table 27
Issued Residential Building Permits, Subdivisions With 25 or More Units in 2015

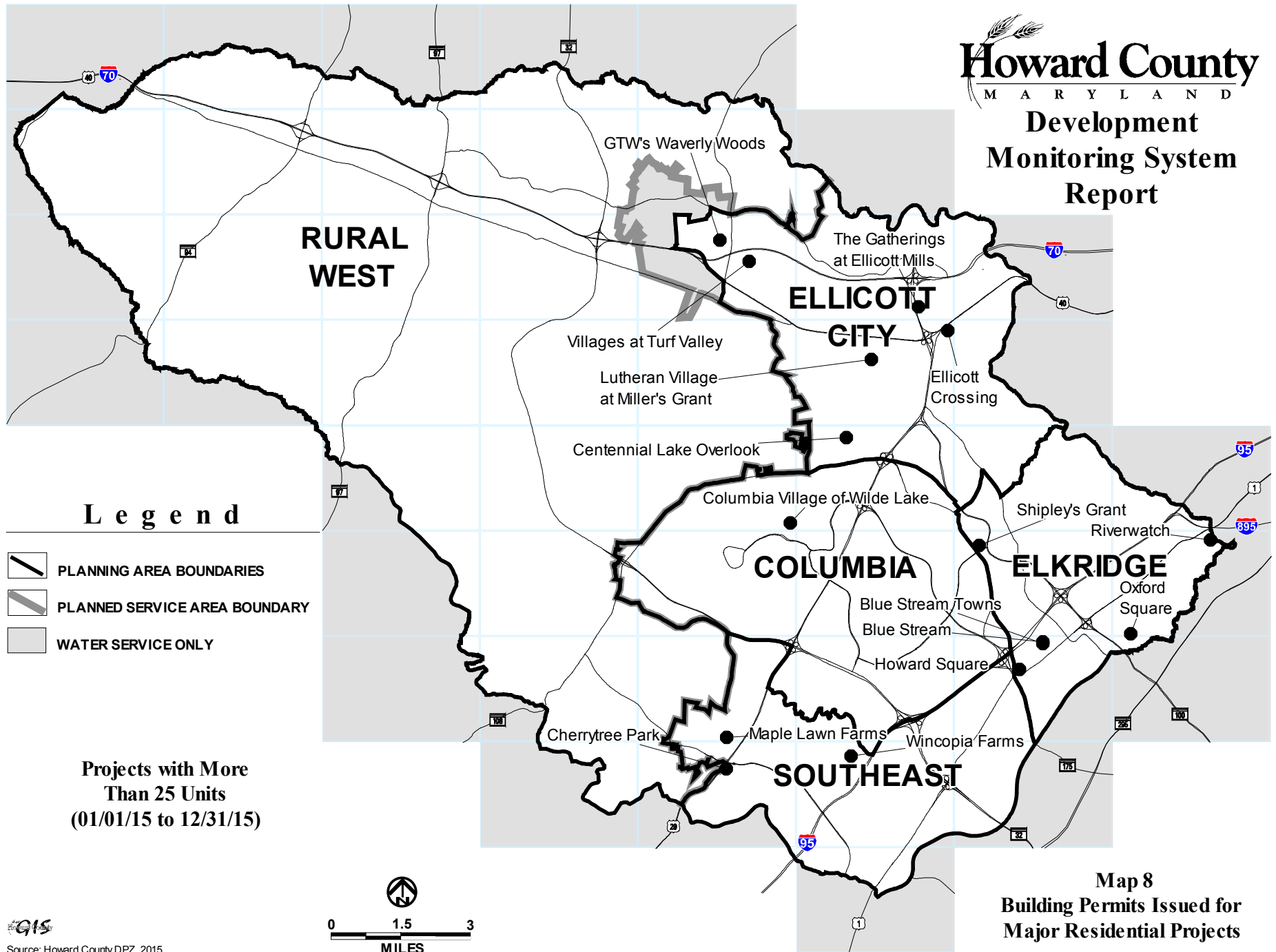
Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Columbia Village of Wilde Lake	Apartments	230	230
Elkridge	Blue Stream	Townhomes/Apartments	193	515
	Howard Square	Townhomes	87	
	Riverwatch	Townhomes	84	
	Oxford Square	Townhomes	81	
	Blue Stream Towns	Townhomes	39	
	Shipley's Grant	Townhomes	31	
Ellicott City	GTW's Waverly Woods	Single-Family Detached/Townhomes/Apartments-Age Restricted	118	288
	Ellicott Crossing	Townhomes	47	
	Centennial Lake Overlook	Single-Family Detached	46	
	The Gatherings at Ellicott Mills	Townhomes-Age Restricted	27	
	Lutheran Village at Miller's Grant	Single-Family Detached/Duplex-Age Restricted	25	
	Villages at Turf Valley	Single-Family Detached/Duplex/Townhomes	25	
Southeast	Maple Lawn Farms	Single-Family Detached/Townhomes	85	177
	Wincopia Farms	Single-Family Detached/Townhomes	60	
	Cherytree Park	Apartments-Age Restricted	32	
TOTAL				1,210

Table 28
Issued Residential Building Permits by Unit Type, 2011 to 2015

Year	SFD	SFA	APT	MH	Total
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
01/15 to 12/15	514	628	478	0	1,620
TOTAL	2,736	2,534	2,941	13	8,224
PERCENT	33%	31%	36%	0.2%	100%
ANNUAL AVG.	547	507	588	3	1,645



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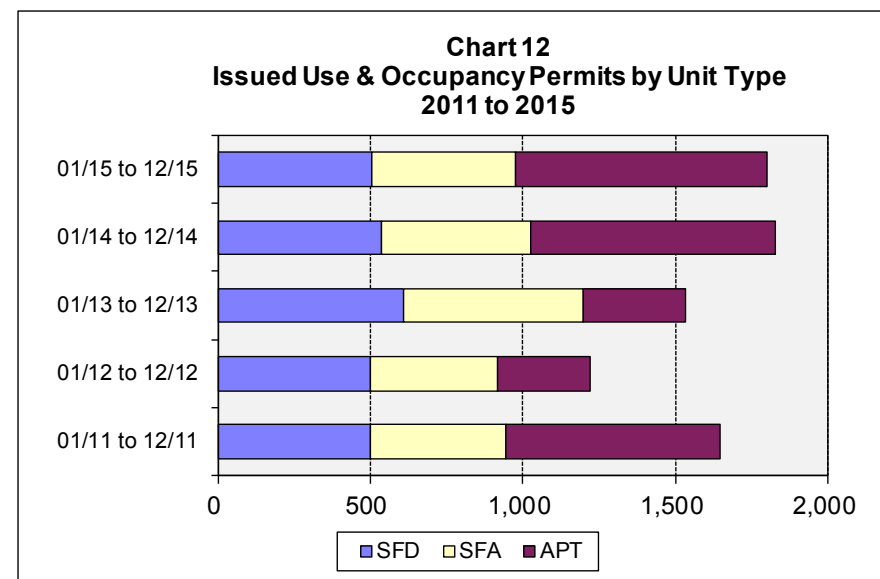
Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2015 to December 31, 2015, the County issued 1,798 use and occupancy permits (Table 29). Of all planning areas, Ellicott City had the most with 509. This is followed by Elkridge with 457, Downtown Columbia with 380, the Southeast with 270, the Rural West with 158, and 24 in the rest of Columbia. Countywide, 28% of the permits were for single family detached units, 26% were for single family attached units and 46% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type in 2015

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	380	0	380	21%
All Other Columbia	12	12	0	0	24	1%
Elkridge	75	202	180	0	457	25%
Ellicott City	137	157	215	0	509	28%
Rural West	158	0	0	0	158	9%
Southeast	124	98	48	0	270	15%
TOTAL	506	469	823	0	1,798	79%
PERCENT	28%	26%	46%	0%	100%	



Five Year Results

From 2011 to 2015, a total of 8,029 use and occupancy permits were issued in Howard County (Table 30). This is an annual average of 1,606 permits per year.

Of the 8,029 total use and occupancy permits issued over the five year timeframe, 33% were for single family detached units, 30% for single family attached units, and 37% for apartment units. There were only 2% less units built last year compared to the year before, 1,798 completions in 2015 compared to 1,829 in 2014, which was the most built over the 5 year analysis time period. Chart 12 shows the results by unit type graphically over time.

Table 30
Issued Use and Occupancy Permits by Unit Type, 2011 to 2015

Year	SFD	SFA	APT	MH	Total
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
01/15 to 12/15	506	469	823	0	1,798
TOTAL	2,653	2,408	2,968	0	8,029
PERCENT	33%	30%	37%	0%	100%
ANNUAL AVG.	531	482	594	0	1,606

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, 2015 to December 31, 2015, 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, 2015. This includes both subdivision and site development plans. There were 22 units in process, all of which in are in Columbia. The timing of actual development will be paced by APFO.

All 22 of these units are single family attached units as part of a single project, Simpson Mill. Map 9 shows the location of this particular project, and it is also included in the summary Table 37.

Compared to last year, there are less age-restricted units in process in this current reporting period, 22 units versus 194 units, respectively.

Table 31
Age Restricted Units from Plans in Process, 12/31/2015
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	22	0	22	100%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	22	0	22	100%
PERCENT	0%	100%	0%	100%	

As of 12/31/14	0	0	194	194	
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Table 32 shows the total MIHU units in process. These total 625, the majority of which are in Elkridge. This is less than the number in process the previous year which had 728.

Table 32
MIHU Units from Plans in Process, 12/31/2015
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	19	0	19	3%
Elkridge	0	85	317	402	64%
Ellicott City	3	8	0	11	2%
Rural West	0	0	0	0	0%
Southeast	0	0	193	193	31%
TOTAL	3	112	510	625	100%
PERCENT	0%	18%	82%	100%	

As of 12/31/14	3	150	575	728	
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Table 33 shows just the age-restricted MIHU units in process. For this year, none of the 625 MIHU units are age-restricted. There were 4 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, 12/31/2015
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	0%
As of 12/31/14					
	0	0	4	4	

Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2015 and December 31, 2015. There were a total of 194 units approved. This is less than the 359 units approved during the previous reporting period. All 194 units are apartment units (rental or condo). 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 90 units were approved—86 in Elkridge and 4 in the Southeast. These 4 units in the Southeast 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 in 2015
(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	162	162	84%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	32	32	16%
TOTAL	0	0	194	194	100%
PERCENT	0%	0%	100%	100%	
1/1/2014 to 12/31/2014					
	94	138	127	359	

Table 35
MIHU Units from Approved Plans in 2015
(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	50	36	86	96%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	4	4	4%
TOTAL	0	50	40	90	100%
PERCENT	0%	56%	44%	100%	
1/1/2014 to 12/31/2014					
	0	91	86	177	

Table 36
Age-Res. MIHU Units from Approved Plans in 2015
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	0	0	0%
Elkridge	0	0	0	0	0%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	4	4	100%
TOTAL	0	0	4	4	100%
PERCENT	0%	0%	100%	100%	
1/1/2014 to 12/31/2014					
	0	5	12	17	

Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2015

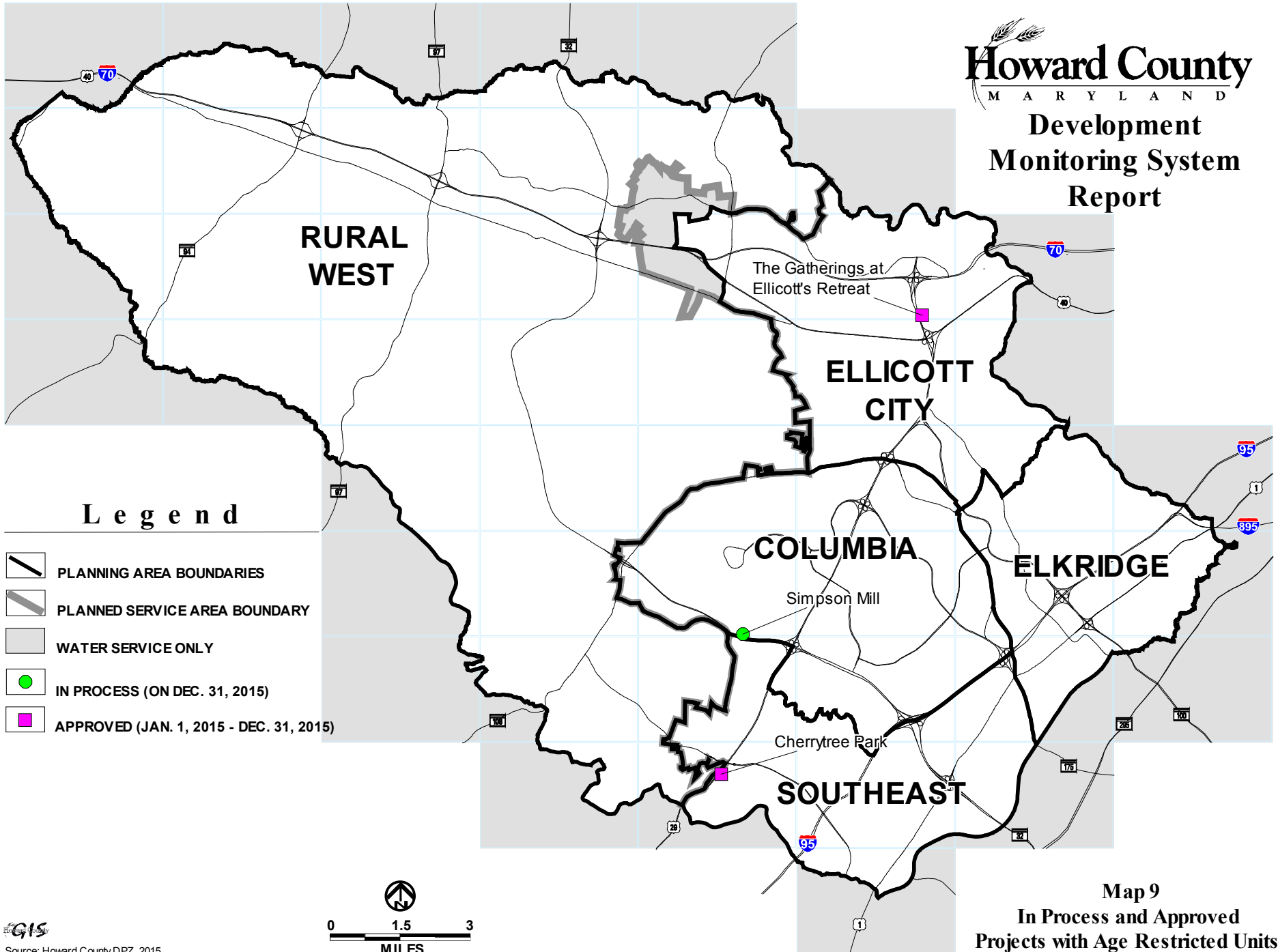
Plan Name	File Number	Zoning	MIHU Units												Market Rate Age Restricted Units			
			Not Age Restricted				Age Restricted				Total MIHU				SFD	SFA	APT	Total
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total				
Laurel Park Station - Remaining Units	S-10-004	TOD	0	0	117	117	0	0	0	0	0	0	117	117	0	0	0	0
The Overlook at Blue Stream - Remaining Units	S-06-018	CAC	0	0	98	98	0	0	0	0	0	0	98	98	0	0	0	0
Oxford Square - Remaining Units	S-15-001	TOD	0	0	89	89	0	0	0	0	0	0	89	89	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
The Vine - Buch Apartments	SDP-15-044	R-APT	0	0	43	43	0	0	0	0	0	0	43	43	0	0	0	0
Howard Square	SDP-16-017	CAC	0	0	42	42	0	0	0	0	0	0	42	42	0	0	0	0
Laurel Park Station	SDP-15-043	TOD	0	0	33	33	0	0	0	0	0	0	33	33	0	0	0	0
Oxford Square - Parcel X	SDP-15-053	TOD	0	0	29	29	0	0	0	0	0	0	29	29	0	0	0	0
Oxford Square - Parcel Y	SDP-14-072	TOD	0	24	0	24	0	0	0	0	0	24	0	24	0	0	0	0
Howard Square	SDP-15-036	CAC	0	20	0	20	0	0	0	0	0	20	0	20	0	0	0	0
Simpson Oaks	S-15-007	CEF	0	19	0	19	0	0	0	0	0	19	0	19	0	0	0	0
Morris Place	SDP-16-001	CAC	0	11	0	11	0	0	0	0	0	11	0	11	0	0	0	0
Morris Place - Remaining Units	S-10-002	CAC	0	10	0	10	0	0	0	0	0	10	0	10	0	0	0	0
Oxford Square - Parcel A-A	SDP-15-052	TOD	0	0	9	9	0	0	0	0	0	0	9	9	0	0	0	0
Trotter's Knoll, Section 1	SP-16-002	R-SA-8	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Long Gate Overlook	SDP-14-074	R-A-15	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Shipleys Grant	P-15-002	R-A-15	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
St. Charles Woods	SP-15-010	R-ED	3	0	0	3	0	0	0	0	3	0	0	3	0	0	0	0
Simpson Mill	SDP-15-057	POR	0	0	0	0	0	0	0	0	0	0	0	0	0	22	0	22
TOTAL			3	112	510	625	0	0	0	0	3	112	510	625	0	22	0	22

Table 38
Approved SDP's with MIHU and Age Restricted Units in 2015






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				
Oxford Square	SDP-14-019	TOD	0	15	0	15	0	0	0	0	0	15	0	15	0	0	0	0
Blue Stream Towns - Section 2	SDP-14-029	CAC	0	19	0	19	0	0	0	0	0	19	0	19	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
Brompton House (Blue Stream Apts)	SDP-14-077	CAC	0	0	36	36	0	0	0	0	0	0	36	36	0	0	0	0
Shipleys Grant - Phase VII	SDP-14-063	R-A-15	0	1	0	1	0	0	0	0	0	1	0	1	0	0	0	0
Morris Place	SDP-15-017	CAC	0	8	0	8	0	0	0	0	0	8	0	8	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
Cherrytree Park	SDP-15-001	POR-MXD-6	0	0	0	0	0	0	4	4	0	0	4	4	0	0	28	28
TOTAL			0	50	36	86	0	0	4	4	0	50	40	90	0	0	190	190

Howard County M A R Y L A N D

Development Monitoring System Report



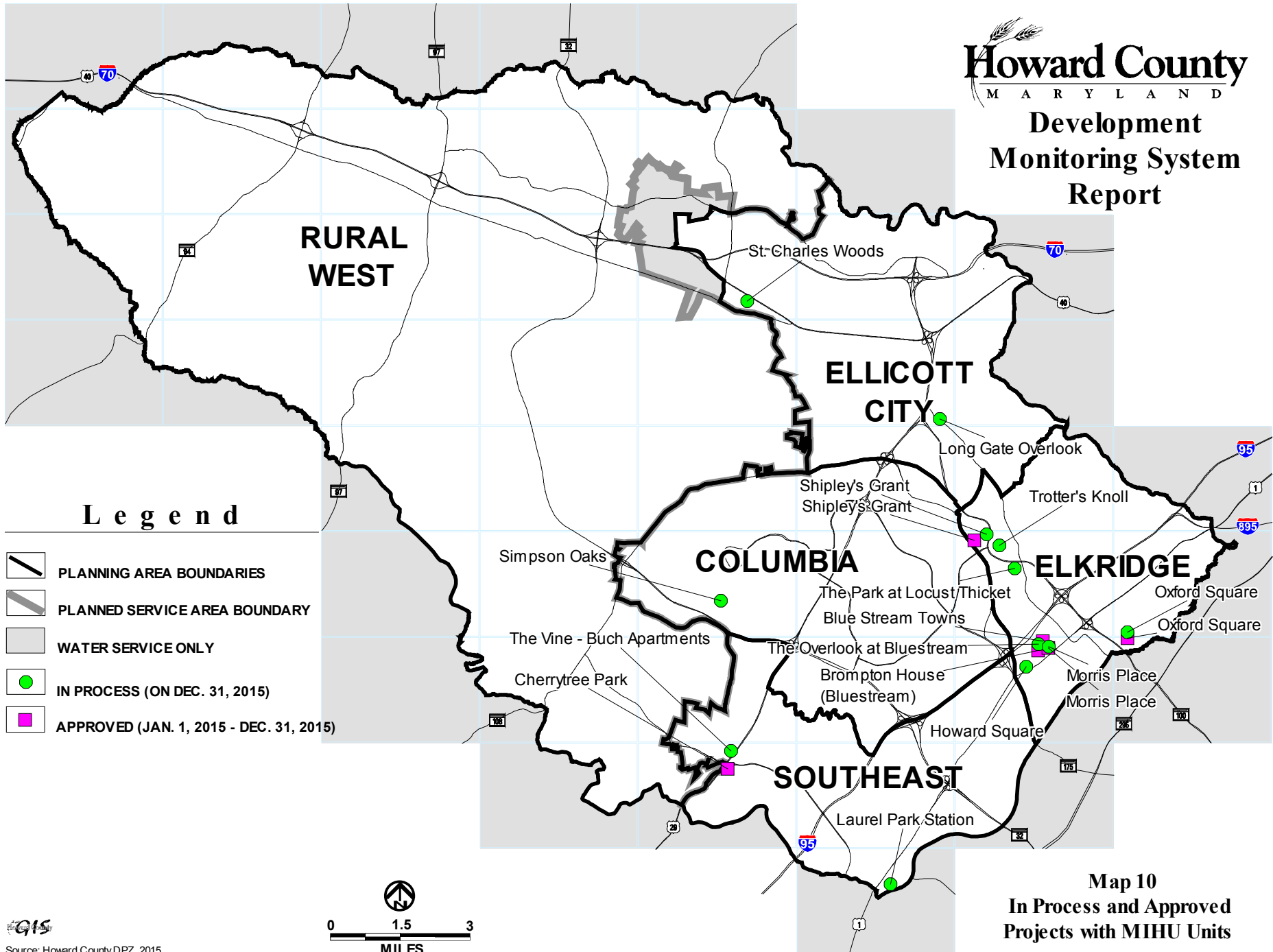
Legend

-  PLANNING AREA BOUNDARIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY
-  IN PROCESS (ON DEC. 31, 2015)
-  APPROVED (JAN. 1, 2015 - DEC. 31, 2015)



Map 9
In Process and Approved
Projects with Age Restricted Units

**Development
Monitoring System
Report**



Use & Occupancy Permits

Table 39 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2015 and December 31, 2015 168 age-restricted units were built, 9% of the total 1,798 housing units built in the County over this latest reporting period.

There were 42 less age-restricted units built in the current reporting period compared to the previous period when there were 210 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, 19% of all new homes built in Howard County have been age-restricted. This is summarized in Table 40.

Table 39
Age Restricted Units Built in 2015
(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	5	4	0	9	5%
Ellicott City	43	64	16	123	73%
Rural West	0	0	0	0	0%
Southeast	0	4	32	36	21%
TOTAL	48	72	48	168	100%
PERCENT	29%	43%	29%	100%	
1/1/2014 to 12/31/2014	41	56	113	210	

Table 40
Age Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/15

Planning Area	SFD	SFA	APT	TOTAL	Total All Units Built	Age-Restricted % of Total
10/04 to 9/05	22	171	291	484	1,650	29%
10/05 to 9/06	35	233	369	637	1,877	34%
10/06 to 9/07	10	168	196	374	1,202	31%
10/07 to 9/08	7	105	130	242	1,602	15%
10/08 to 9/09	0	75	171	246	1,132	22%
10/09 to 12/10 *	0	132	118	250	1,427	18%
01/11 to 12/11	6	46	182	234	1,647	14%
01/12 to 12/12	34	62	115	211	1,220	17%
01/13 to 12/13	37	36	48	121	1,545	8%
01/14 to 12/14	41	56	113	210	1,829	11%
01/14 to 12/15	48	72	48	168	1,798	9%
TOTAL	240	1,156	1,781	3,177	16,929	19%
PERCENT	8%	36%	56%	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.

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

Building on that success, in the spring of 2009 "Batch 14" was initiated, which attracted 13 high quality applications. All but two of the properties were over 50 acres. Batch 14 was a competitive application cycle, meaning there wasn't enough funding to acquire easements on all of the applicant properties. Offers were made on the top seven scoring farms in early De-

ember 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 were five settlements on prior year applications. The 2014 settlements added 358 acres to the ALPP. In 2015, there were three new applicant properties and four settlements on prior year applications, for a 2015 acquisition total of 190 ALPP acres. There was also one MALPF settlement in 2015 on a 71 acre farm.

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 2015, no properties were preserved with an agricultural easement through the development process.

As of December 31, 2014, there were 22,262 acres of permanently preserved agricultural land. This includes 15,220 acres of purchased easements through the County's program, 4,100 acres of easements purchased by the State and 2,942 preservation acres dedicated as part of the land development process (Table 41).

Table 41
Agricultural Preservation Easements, December 31, 2015

Type	Acres	Percent
County Purchased Agric. Easements (1)	15,220	68%
State Purchased Agric. Easements	4,100	18%
Dedicated Agric. Preservation Parcels	2,942	13%
TOTAL	22,262	100%

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

Other Rural Easement Dedication

As previously indicated, last year no acres were preserved through the development process and enrolled in the Agricultural Land Preservation Program. The total acres of land dedicated in this manner through 2015 is 2,942.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 210 acres of land in 10 parcels were dedicated as joint Howard County/Homeowner’s Association preservation parcels. Table 42 shows the land preservation totals from dedicated easements through then end of 2015 for all easement types.

Since 1992, preservation easements on 11,442 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 6,519 acres, are jointly held by Howard County and various homeowner’s associations. As indicated earlier, 2,942 acres are held by the Howard County Agricultural Land Preservation Program. A total of 1,067 acres are jointly held by the Howard County Conservancy and Howard County and 391 acres are jointly held by Howard County and the Patuxent Conservation Corps. The remaining acres are jointly held by Howard County and the Audubon Society and by homeowner’s associations and the Audubon Society as well as other holders.

Table 42 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 15,848 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,406 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 11,442 acres, is land in dedicated preservation easements. Of the 4,406 acres subdivided for

residential development, about 469 acres are not yet developed (built on), 3,502 acres are developed (built on) and 435 acres are for roads.

Table 42
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	311	360	
Undeveloped Lots (From Density Transfer)	97	109	
Total Undeveloped Lots	408	469	
Developed Lots (By Right)	2,144	2,382	
Developed Lots (From Density Transfer)	1,057	1,120	
Total Developed Lots	3,201	3,502	
Roadway		435	
TOTAL	3,609	4,406	27.8%

Preservation	Parcels	Acres	
Agricultural Preservation	85	2,942	
Howard County/Homeowner's Association	606	6,519	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County/Howard County Conservancy	31	1,067	
Howard County/Patuxent Conservation Corps. Inc.	16	391	
Other	88	393	
Total Preservation	831	11,442	72.2%

GRAND TOTAL (Includes Res. Develop.)	4,440	15,848	100.0%
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Total Preserved Land in the Rural West

Preservation easements in the Rural West discussed above total 30,725 acres. This includes all 22,225 acres of agricultural preservation easements and 8,500 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 (8,047 acres), WSSC land (2,438 acres), permanent historic easements (103 acres) and other environmental easements (1,159 acres) the total preserved land amounts to 42,472 acres, about 45% of all land in the Rural West.

Map 11 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.

Nighborhood 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 2015 there were two receiving subdivisions utilizing this option acquiring a total of eight development rights. These subdivisions received the transferred density from four new sending parcels totalling 15.2 acres. Table 43 shows the aggregate results since the beginning of this program. A total of 11 neighborhood preservation parcels have been created totaling 31.3 acres. The easement holder for 10 of these acres is Howard County. The Taylor Property Community Association is the holder of the one other easement. Through this process, additional density was created for 16 additional single family detached homes, 6 additional townhomes and 3 additional apartment units on a total of 3.9 acres. These additional units are part of receiving subdivisions that total 576 housing units on 287 acres. Thus far through the end of 2015, 323 of these 576 units are built. It should be noted that 163.9 of the 287 acres are open space acres as normally required by the zoning and subdivision regulations.

Total Preservation Easements in the East

In addition to neighborhood preservation parcels in the east, there are also 194 acres in permanent historic easements, 316 acres in Maryland Environmental Trust easements, 112 acres in other land trust conservation easements, and 37 acres in a county purchased agricultural preservation easement. Total preservation easements in the east therefore amount to 690 acres. This is summarized in Table 44.

Total Preserved Land in the East

Including County and State parks (10,438 acres), WSSC land (677 acres), non-County Open space such as HOA land (2,743) and Columbia Association open space (3,616 acres) the total preserved land amounts to 18,164 acres, about 28% 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, 2015

Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Undeveloped Lots (By Right)	245	0	0	245	44.8
Undeveloped Lots (From Density Transfer)	8	0	0	8	1.4
Total Undeveloped Lots	253	0	0	253	46.2
Developed Lots (By Right)	209	60	37	306	49.9
Developed Lots (From Density Transfer)	8	6	3	17	2.5
Total Developed Lots	217	66	40	323	52.4
Open Space					163.9
Roadway					23.6
Other					0.9
Total	470	66	40	576	287.0 90.2%

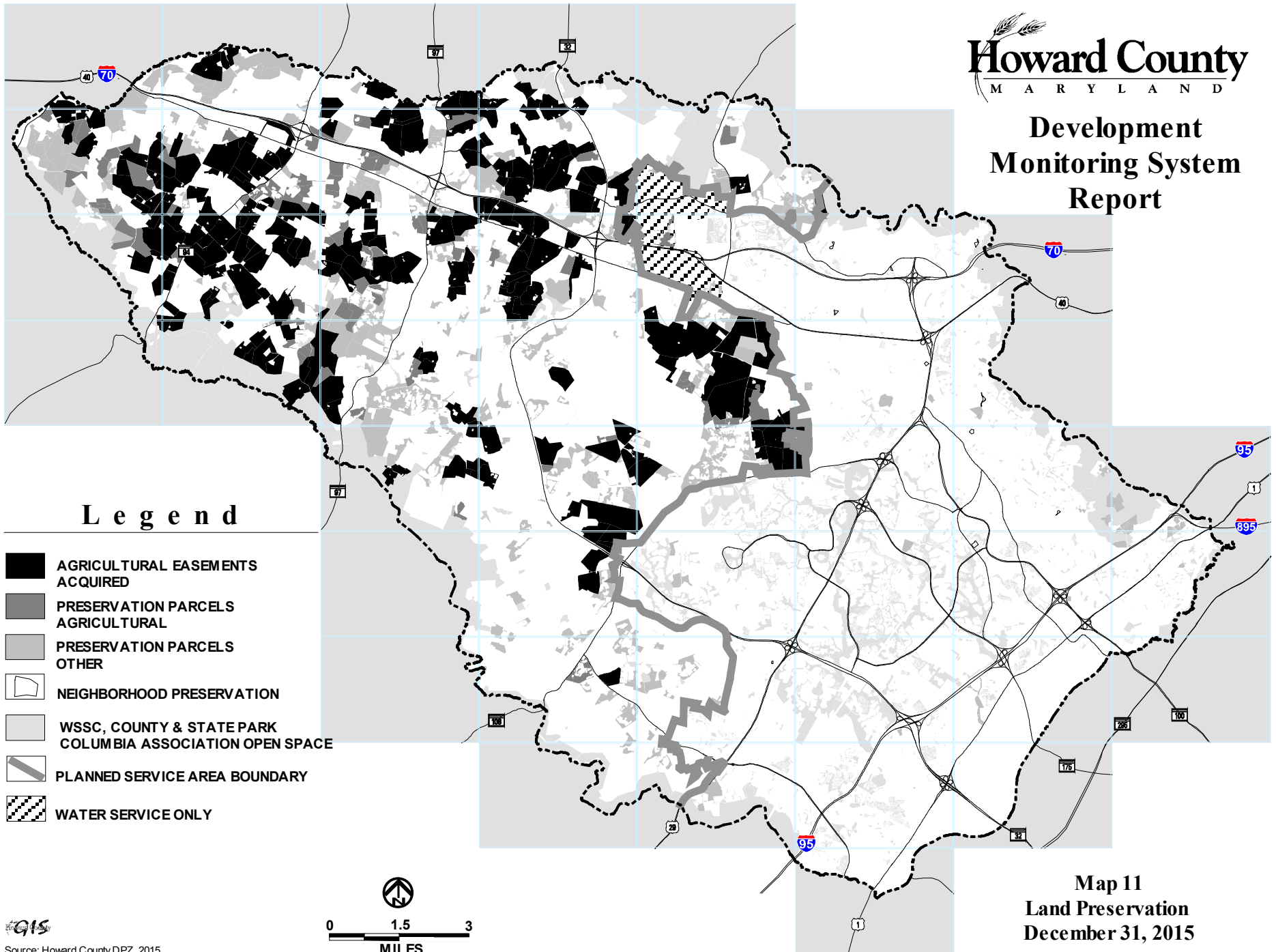
East Preserved Land - Sending Parcels Easement Holder	Preservation Parcels	Acres
Howard County Government	10	28.0
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Taylor Properties Community Association, Inc.	1	3.3
Total Preservation	11	31.3 9.8%
GRAND TOTAL		318.3 100.0%

Table 44
East Preservation Easements, December 31, 2015

Type	Acres	Percent
Neighborhood Preservation	31	100%
Permanent Historic Easements	194	29%
Maryland Environmental Trust Easements	316	48%
Land Trust Conservation Easements	112	17%
Agricultural Easement (County Purchased)	37	6%
Total Other Easements	659	100%
TOTAL EAST PRESERVATION	690	



Development Monitoring System Report



Legend

- AGRICULTURAL EASEMENTS ACQUIRED
- PRESERVATION PARCELS AGRICULTURAL
- PRESERVATION PARCELS OTHER
- NEIGHBORHOOD PRESERVATION
- WSSC, COUNTY & STATE PARK COLUMBIA ASSOCIATION OPEN SPACE
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY



0 1.5 3
MILES

Map 11
Land Preservation
December 31, 2015



Source: Howard County DPZ, 2015.

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 12 non-residential lots recorded countywide in 18 subdivision plans totaling 231 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 in 2015

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	2	17%	6	33%	24	10%
Elkridge	0	0%	2	11%	15	7%
Ellicott City	6	50%	5	28%	28	12%
Rural West	0	0%	2	11%	116	50%
Southeast	4	33%	3	17%	49	21%
TOTAL	12	100%	18	100%	231	100%

Table 46 shows the recorded non-residential subdivisions from January 1, 2011 to December 31, 2015. Over this five year period there were 22 non-residential lots recorded countywide in 75 subdivision plans totaling 1,342 acres. This amounts to an annual average over the five year analysis time period of 4 lots in 15 plans encompassing 268 acres.

Table 46
Recorded Non-Residential Subdivisions, 2011 to 2015

Countywide	Lots	Plans	Acreage
1/11 to 12/11	6	12	210
1/12 to 12/12	4	22	432
1/13 to 12/13	4	24	293
1/14 to 12/14	8	17	407
1/15 to 12/15	12	18	231
TOTAL	22	75	1,342
ANNUAL AVG.	4	15	268

In-Process Plans

Countywide, there were 41 non-residential subdivision plans in process as of December 31, 2015. This compares to 31 plans in process for the previous reporting period (Table 47). Thirteen plans were in the Southeast, 11 plans in Columbia, 8 plans in Elkridge, 6 plans Ellicott City, 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, 2015, there were 33 lots in process, compared to 21 in process on December 31, 2014. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 608 non-residential acres in the subdivision process as of December 31, 2015 (Table 49). This compares to 416 acres in process one year earlier. For the current year the greatest acreage amount is in Elkridge (221 acres). This is followed by the Southeast with 162 acres, 127 acres in Columbia, 58 acres in Ellicott City, and 40 acres in the Rural West.

Table 47
Number of Non-Residential Plans in Process, 12/31/15
with Comparisons to 12/31/2014 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	6	0	0	0	5	11
Elkridge	2	4	0	0	2	8
Ellicott City	4	0	0	0	2	6
Rural West	2	0	0	0	1	3
Southeast	6	0	0	1	6	13
TOTAL	20	4	0	1	16	41
12/31/14 Total	16	2	0	1	12	31

Table 48
Non-Residential Lots from Subdivision Plans in Process, 12/31/2015
with Comparisons to 12/31/2014 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	0	15	15
Elkridge	10	0	0	0	10
Ellicott City	0	0	0	2	2
Rural West	0	0	0	0	0
Southeast	0	0	6	0	6
TOTAL	10	0	6	17	33
12/31/14 Total	7	0	2	12	21

Table 49
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2015
with Comparisons to 12/31/2014 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	0	127	127
Elkridge	209	0	0	12	221
Ellicott City	0	0	0	58	58
Rural West	0	0	0	40	40
Southeast	0	0	49	113	162
TOTAL	209	0	49	350	608
12/31/14 Total	147	0	15	254	416

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 close to 1.3 million square feet were approved in 23 site development plans on 405 acres (Table 50). The greatest amount of square footage approved was in Downtown Columbia, followed by the rest of Columbia, the Southeast, Elkridge, the Rural West and then Ellicott City.

Table 51 shows the approved square footage by building type. About 428,000 square feet, 33% of the total, are for manufacturing/extensive industrial uses, most of which is in the Southeast and Columbia. About 374,000 square feet, 29% of the total, are for office/service uses with the vast majority in Downtown Columbia. Government and institutional uses account for about 354,000 square feet, and retail uses account for 126,000 square feet. Chart 13 shows this breakdown graphically.

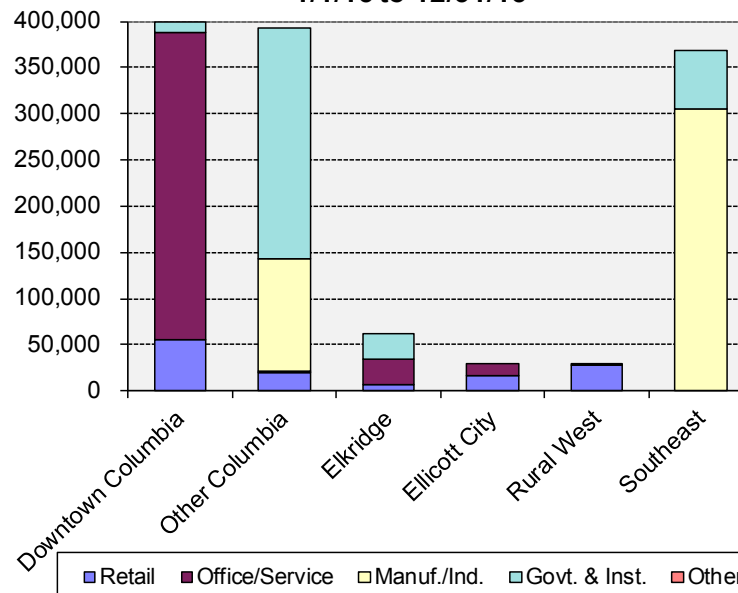
Table 51
Building Square Feet in Approved Non-Residential Site Development Plans in 2015

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	54,741	333,500	0	11,210	0	399,451
All Other Columbia	20,386	984	121,044	251,007	0	393,421
Elkridge	6,888	26,807	0	28,085	0	61,780
Ellicott City	17,031	12,300	0	0	0	29,331
Rural West	27,200	0	2,400	0	0	29,600
Southeast	0	0	304,575	63,367	0	367,942
TOTAL	126,246	373,591	428,019	353,669	0	1,281,525
PERCENT	9.9%	29.2%	33.4%	27.6%	0.0%	100.0%

Table 50
Approved Non-Residential Site Development Plans in 2015

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	399,451	31%	3	13%	28	7%
All Other Columbia	393,421	31%	4	17%	64	16%
Elkridge	61,780	5%	4	17%	18	4%
Ellicott City	29,331	2%	3	13%	4	1%
Rural West	29,600	2%	7	30%	252	62%
Southeast	367,942	29%	2	9%	39	10%
TOTAL	1,281,525	69%	23	100%	405	93%

Chart 13
Sq. Ft. in Approved Site Development Plans 1/1/15 to 12/31/15



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

Of the 1.3 million square feet of non-residential building space approved in site development plans last year, most all of it was 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 Downtown Columbia, three plans with more than 10,000 square feet were approved last year—a large office, restaurant and retail complex in the Crescent neighborhood, retail and restaurant space in the Warfield neighborhood, and a small restaurant and park facilities in Symphony Woods. In the rest of Columbia, four larger plans were approved—the new SET building at Howard Community College, a self-storage building, the

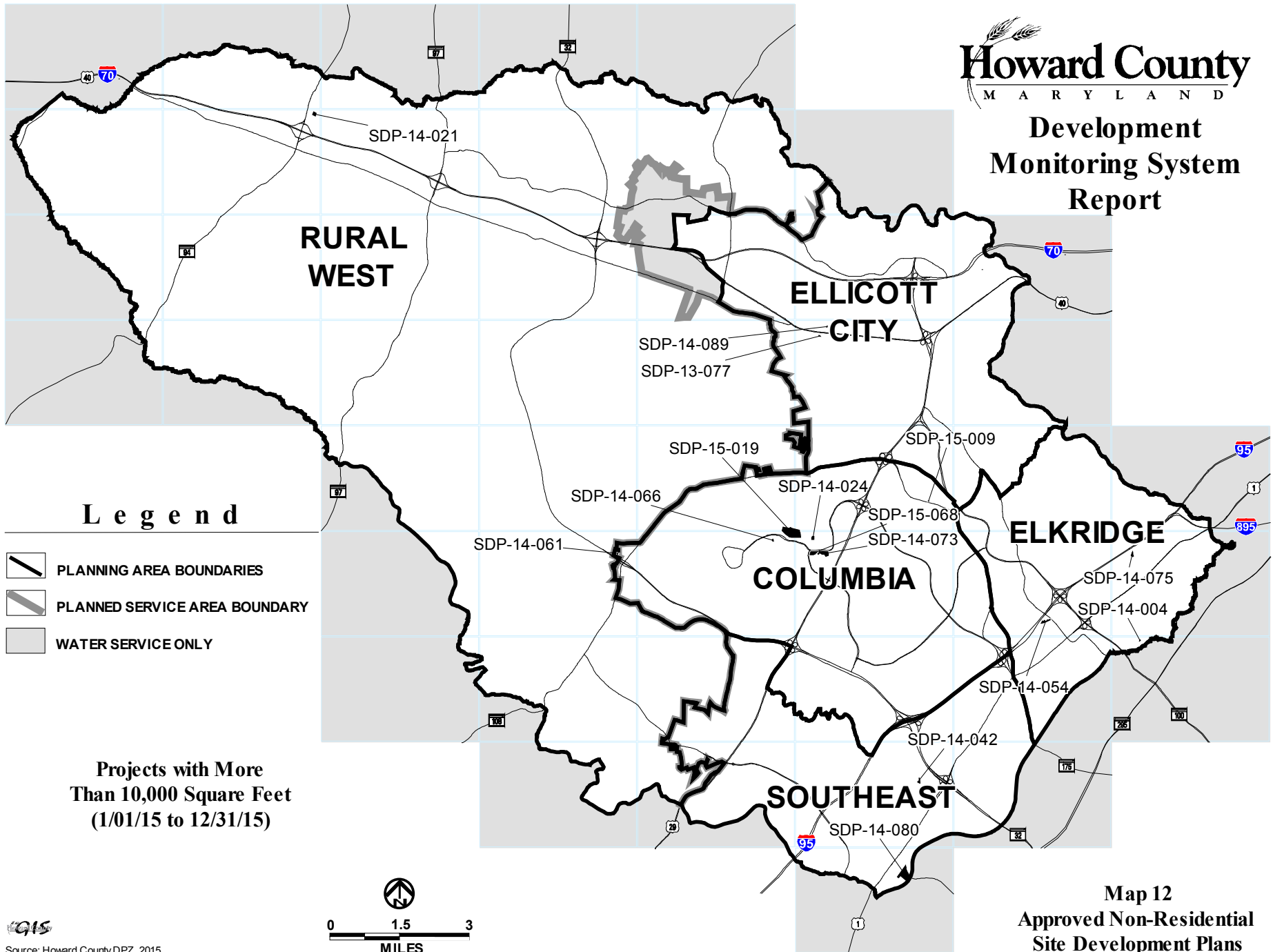
new Wilde Lake Middle School replacement, and a new sales center and car wash at Antwerpen Hyundai. In Elkridge, a new fire station replacement, a new restaurant and day care in Oxford Square, and some storage space in the Meadowridge Business Park were approved. In Ellicott City a small retail building was added to the Bethany Market Place and a small office building approved in Demirel Plaza. A new shopping center called Wilson Village was approved in the Rural West. In the Southeast, a large warehouse/distribution center was approved for Coastal Sunbelt Produce and new school for Bethel Ministries was also approved.

Table 52
Projects With More Than 10,000 Square Feet in Approved Non-Residential Site Development Plans in 2015

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-15-068	Columbia Town Center, Crescent	Office/Restaurant/Retail	353,500	399,451
	SDP-14-024	Warfield Neighborhood, Parcel C	Retail/Restaurant	28,786	
	SDP-14-073	Symphony Woods	Restaurant/Park Facilities	17,165	
Columbia	SDP-14-066	Howard Community College	Science, Engineering, Tech. Bldg.	144,786	393,421
	SDP-15-009	ezStorage	Self-Storage Bldg.	121,044	
	SDP-15-019	Wilde Lake Middle School	New School Replacement	106,221	
	SDP-14-061	Antwerpen Hyundai	Sales Center/Car Wash	21,370	
Elkridge	SDP-14-075	Elkridge Volunteer Fire Station	New Fire Station Replacement	28,085	57,105
	SDP-14-004	Oxford Square Parcel P	Restaurant/Day Care	15,364	
	SDP-14-054	Meadowridge 95 Par A	Storage/Office	13,656	
Ellicott City	SDP-14-089	Bethany Market Place	Retail	15,000	27,300
	SDP-13-077	Demirel Plaza	Office	12,300	
Rural West	SDP-14-021	Wilson Village	Shopping Center	27,200	27,200
Southeast	SDP-14-080	Coastal Sunbelt Produce	Warehouse/Distribution	304,575	367,942
	SDP-14-042	Bethel Ministries, Inc.	New School	63,367	
TOTAL					1,272,419



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Legend

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

**Projects with More
Than 10,000 Square Feet
(1/01/15 to 12/31/15)**



Source: Howard County DPZ, 2015.



**Map 12
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 January 1, 2011 to December 31, 2015. Over this timeframe there were 112 plans approved on 1,4551 acres including close to 4.2 million square feet of building space. This equates to an annual average of about 837,000 square feet of new building space approved per year.

Last year, with 1.3 million square feet of approved space, was the most of all five years and more than double the 583,000 square feet approved the year before. Chart 14 depicts these annual amounts. The amount of non-residential building square feet in approved in site development plans over the five year period shows a rising trend with last year being an anomaly.

Table 54 shows the five year history by building type. Over the five years, about 36% of the total 4.2 million square feet was for office/service space. About 33% was for manufacturing/extensive industrial space, 19% for government and institutional uses, 11% for retail uses and about 1% for other uses.

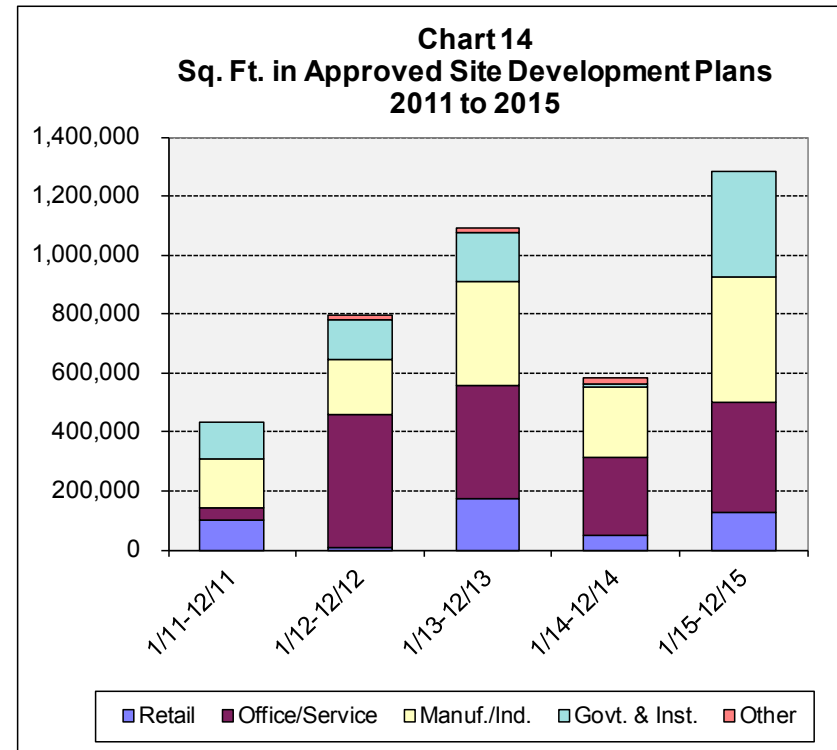


Table 53
Approved Non-Residential Site Development Plans
2011 to 2015

Year	Square Feet	Number or Plans	Acreage
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
1/15-12/15	1,281,525	23	405
TOTAL	4,184,446	112	1,551
ANNUAL AVG.	836,889	22	310

Table 54
Building Square Feet in Approved Non-Residential Site Development Plans
2011 to 2015

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
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
1/15-12/15	126,246	373,591	428,019	353,669	0	1,281,525
TOTAL	462,798	1,507,472	1,373,733	790,844	49,599	4,184,446
PERCENT	11.1%	36.0%	32.8%	18.9%	1.2%	100.0%

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of December 31, 2015 are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 32 non-residential site development plans in process as of December 31, 2015. These plans include about 529,000 square feet of building space covering 357 acres. This compares to about 682,000 square feet in 25 plans on 292 acres that were in process the previous year (on December 31, 2014).

As shown in Table 55, Elkridge had the most square footage in process, followed by the Southeast and then Columbia. Table 56 shows a more detailed breakdown of square footage by building type. About 194,000 square feet are for office/service uses, 167,000 square feet for government and institutional uses, and 130,000 square feet for retail uses. Manufacturing/extensive industrial space accounts for 30,000 square feet.

Major Projects

Table 57 shows site development plans with buildings greater than 10,000 square feet. Map 13 shows the locations of these projects. These projects account for about 62% of the total 529,000 square feet in process.

Table 55
In-Process Non-Residential Site Development Plans, 12/31/15
with Comparisons to Countywide In-Process on 12/31/14

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	48,930	9%	1	3%	5	1%
All Other Columbia	141,437	27%	10	31%	44	12%
Elkridge	175,635	33%	10	31%	165	46%
Ellicott City	2,400	0%	2	6%	7	2%
Rural West	15,981	3%	3	9%	99	28%
Southeast	144,821	27%	6	19%	38	11%
TOTAL	529,204	100%	32	100%	357	100%
12/31/2014	682,455		25		292	

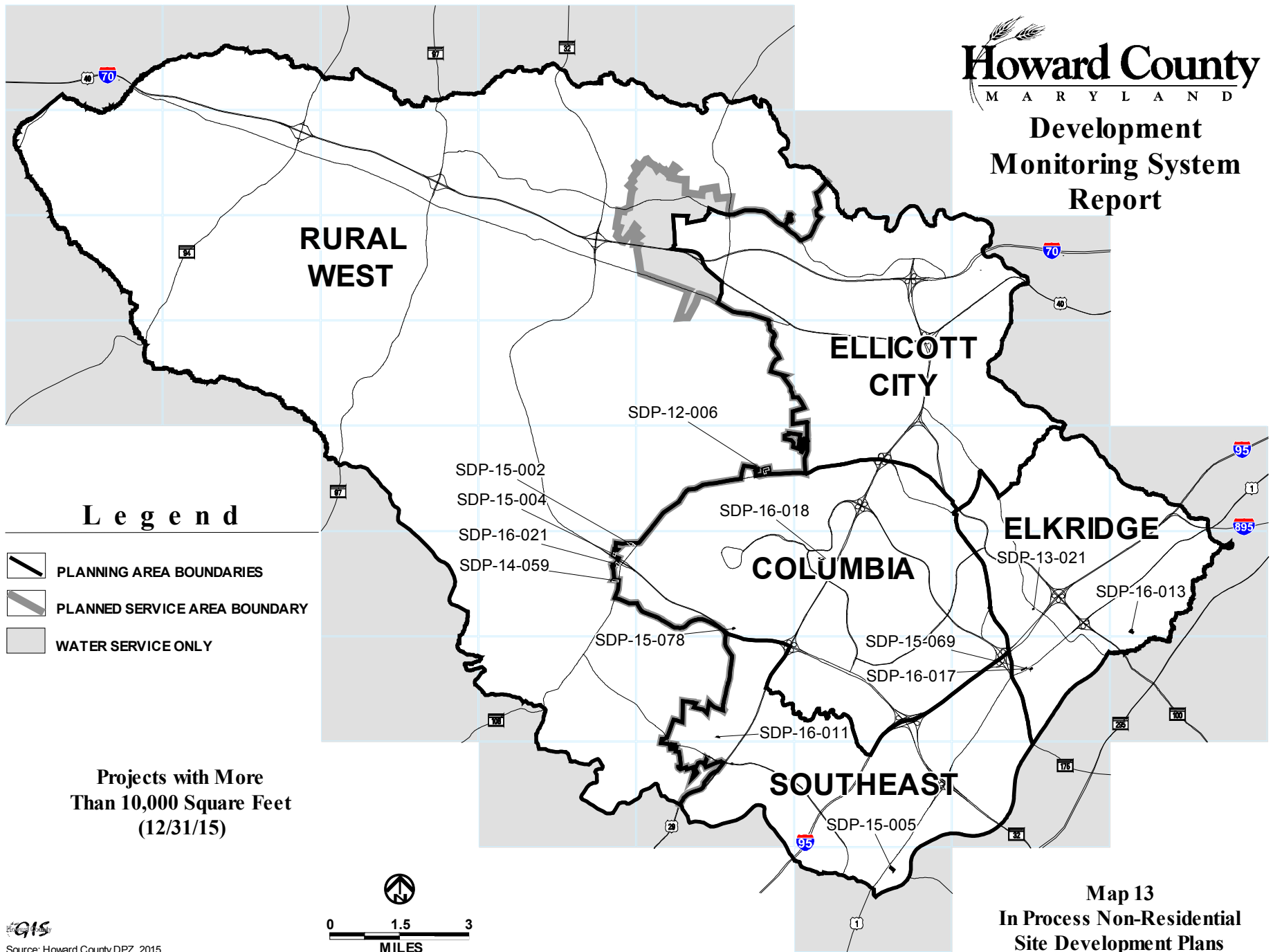
Table 56
Building Square Feet in In-Process Site Development Plans, 12/31/15
with Comparisons to Countywide In-Process on 12/31/14

Region	Office/ Service		Manuf./ Ext. Ind.	Govt. & Inst.	Other	TOTAL
	Retail	Service	Ext. Ind.	& Inst.	Other	
Downtown Columbia	35,903	13,027	0	0	0	48,930
All Other Columbia	73,783	43,654	0	24,000	0	141,437
Elkridge	18,387	16,741	0	135,342	5,165	175,635
Ellicott City	2,400	0	0	0	0	2,400
Rural West	0	15,981	0	0	0	15,981
Southeast	0	104,412	30,017	6,392	4,000	144,821
TOTAL	130,473	193,815	30,017	165,734	9,165	529,204
PERCENT	24.7%	36.6%	5.7%	31.3%	1.7%	100.0%
12/31/2014	188,327	109,510	151,059	222,349	11,210	682,455

Table 57
Projects With More Than 10,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/15

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-16-018	Merriweather Post Pavillion and Park	Office/Commercial	48,930	48,930
Columbia	SDP-15-078	Grace Drive	Office/Restaurant	45,915	
	SDP-16-021	Antwerpen Properties - Ten Oaks	Retail	24,671	
	SDP-12-006	Dar-Al-Taqwa	Temple Expansion	24,000	
	SDP-15-002	Clarksville Commons	Shopping Center	21,710	
	SDP-15-004	Coleman Fiat	Auto Sales/Service	13,952	130,248
Elkridge	SDP-16-013	Elementary School #42	New School	116,633	158,623
	SDP-13-021	Mayfield Logistics Facility	Government Facility	18,709	
	SDP-15-069	CVS	Pharmacy	13,281	
	SDP-16-017	Howard Square	Retail Site	10,000	
Rural West	SDP-14-059	Donaldson Funeral Home	Funeral Home	15,981	15,981
Southeast	SDP-16-011	Maple Lawn Business District	Office Building	104,412	134,429
	SDP-15-005	Napa Washington	Warehouse	30,017	
TOTAL					329,588

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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, 2015 to December 31, 2015, 88 permits were issued for almost 1.3 million square feet in non-residential building space (Table 58). The greatest amount of square footage was in the Southeast, followed by Columbia, Elkridge and Ellicott City.

Table 58
Issued Non-Residential Building Permits in 2015

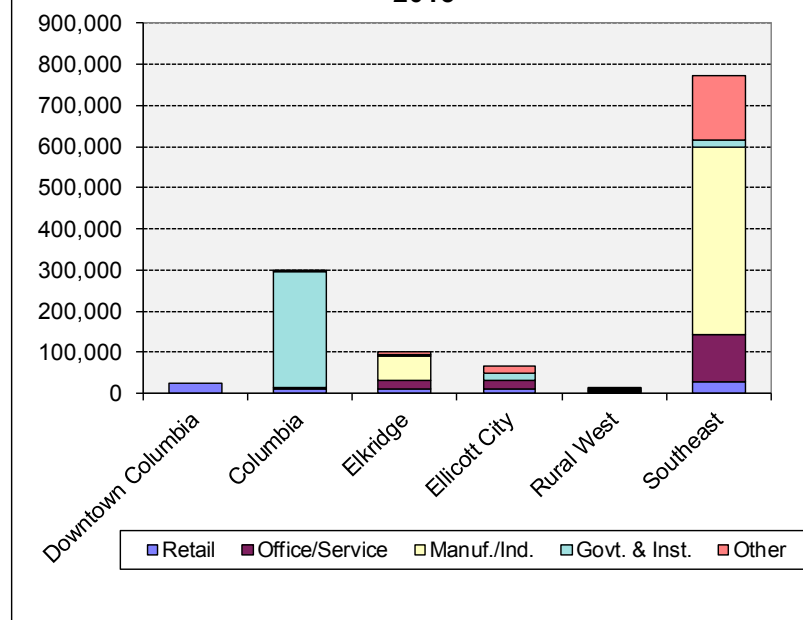
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	26,277	2%	5	6%
All Other Columbia	300,814	23%	19	22%
Elkridge	102,116	8%	17	19%
Ellicott City	66,669	5%	21	24%
Rural West	11,665	1%	5	6%
Southeast	772,606	60%	21	24%
TOTAL	1,280,147	100%	88	100%

Table 59 shows the approved square footage by building type. About 518,000 square feet, 40% of the total, are for manufacturing/extensive industrial uses, the majority of which is in the Southeast. Another 25%, about 322,000 square feet, are for governmental and institutional uses. About 12% of the total, or 162,000 square feet, are for office/service uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 59
Building Square Feet in Issued Non-Residential Building Permits in 2015

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	26,277	0	0	0	0	26,277
Columbia	12,451	686	0	283,832	3,845	300,814
Elkridge	10,637	19,890	60,000	3,503	8,086	102,116
Ellicott City	10,416	22,384	0	15,610	18,259	66,669
Rural West	4,827	3,274	2,264	1,300	0	11,665
Southeast	27,874	115,386	455,727	17,636	155,983	772,606
TOTAL	92,482	161,620	517,991	321,881	186,173	1,280,147
PERCENT	7.2%	12.6%	40.5%	25.1%	14.5%	100.0%

Chart 15
Sq. Ft. in Issued Building Permits 2015



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

Of the close to 1.3 million total square feet of non-residential building space in issued permits over the current reporting period, 988,000 square feet, 77% of the total, were in projects larger 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 new Coastal Sunbelt Produce warehouse and office building in the Southeast Planning Area. A large 101,000 square foot office building accompanied by a 152,000 square foot parking garage as part of the Annapolis Junction Town Center mixed-use project was also permitted in the Southeast.

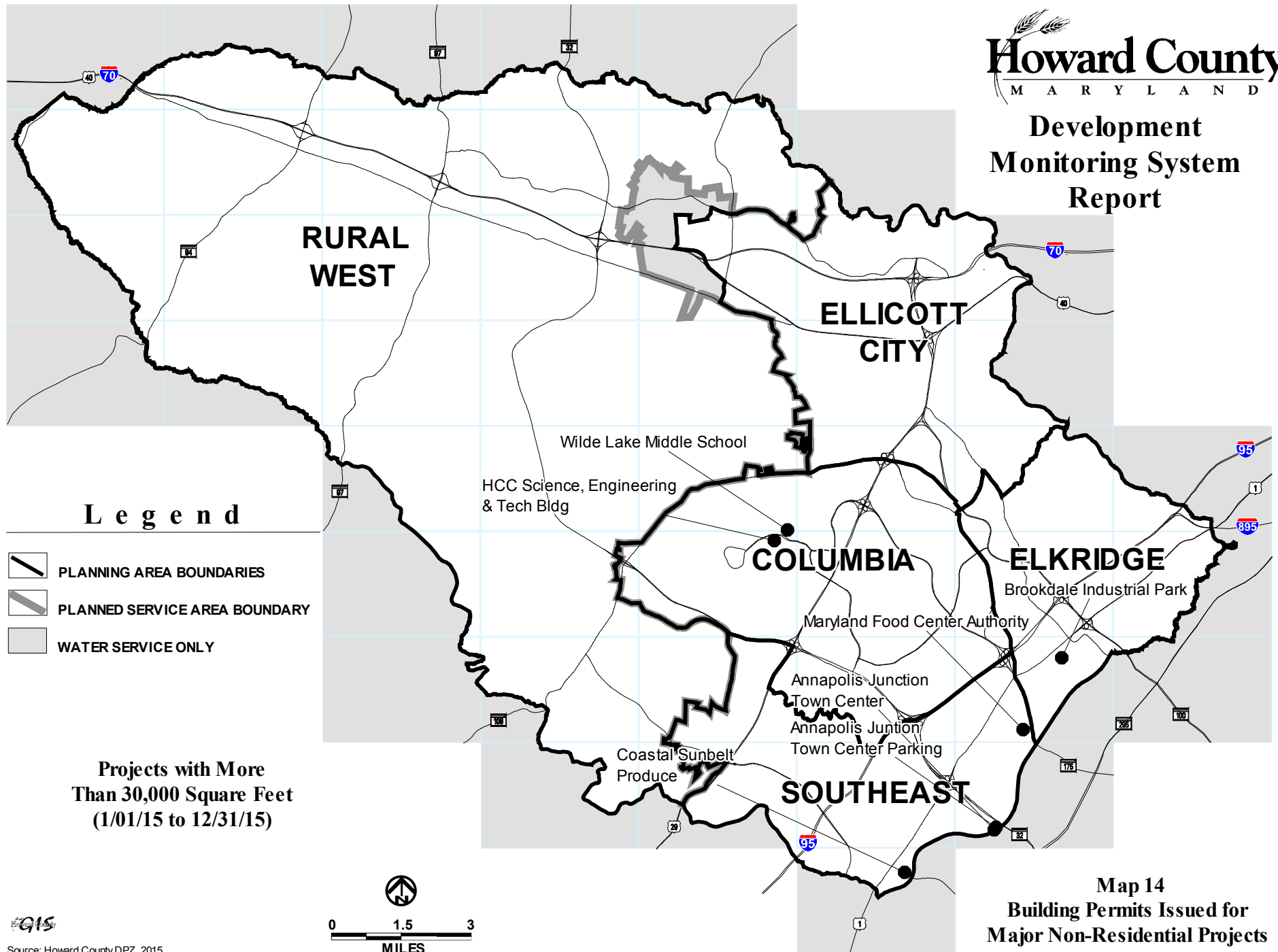
In Elkridge, a building permit for a 60,000 square foot warehouse and office building was issued in the Brookdale Industrial Center.

In Columbia, the new 145,000 square foot Science, Engineering and Technology (SET) building on the Howard Community College is under construction. In addition, the new 106,000 square foot Wilde Lake Middle School replacement was permitted in Columbia.

Table 60
Building Permits Issued for Major Non-Residential Projects With More Than 30,000 Square Feet in 2015

Region	Name	Proposed Use	Square Feet	TOTAL
Columbia	HCC Science, Engineering and Technology Building	Instructional, Research and Office Space	144,786	251,007
	Wilde Lake Middle School	New Replacement School	106,221	
Elkridge	Brookdale Industrial Park	New Warehouse/Office Building	60,000	60,000
Southeast	Coastal Sunbelt Produce	New Storage/Warehouse Building	336,217	677,417
	Annapolis Junction Town Center Parking	New 2 Story Parking Garage	152,000	
	Annapolis Junction Town Center	New 4 Story Office Building	101,200	
	Maryland Food Center Authority	New Warehouse/Office Building	88,000	
TOTAL				988,424

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Source: Howard County DPZ, 2015.



Five Year Results

Table 61 shows issued non-residential building permits countywide for the last five reporting periods from 2011 to 2015. Over this five year time-frame there were 366 permits issued for close to 5.4 million square feet of building space. This equates to an annual average of almost 1.1 million square feet per year.

The latest reporting period, with 1.3 million square feet in issued permits is a 40% increase from the 915,000 square feet permitted the year before.

Table 62 shows the five year history by building type. Over the five years, 26% of the total 5.4 million square feet was for office/service space. About 24% was manufacturing/extensive industrial space, another 24% for government and institutional uses and 13% for retail space. Chart 16 shows this graphically.

Table 61
Issued Non-Residential Building Permits
2011 to 2015

Year	Square Feet	Number of Permits
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
1/15-12/15	1,280,147	88
TOTAL	5,372,301	366
ANNUAL AVG.	1,074,460	73

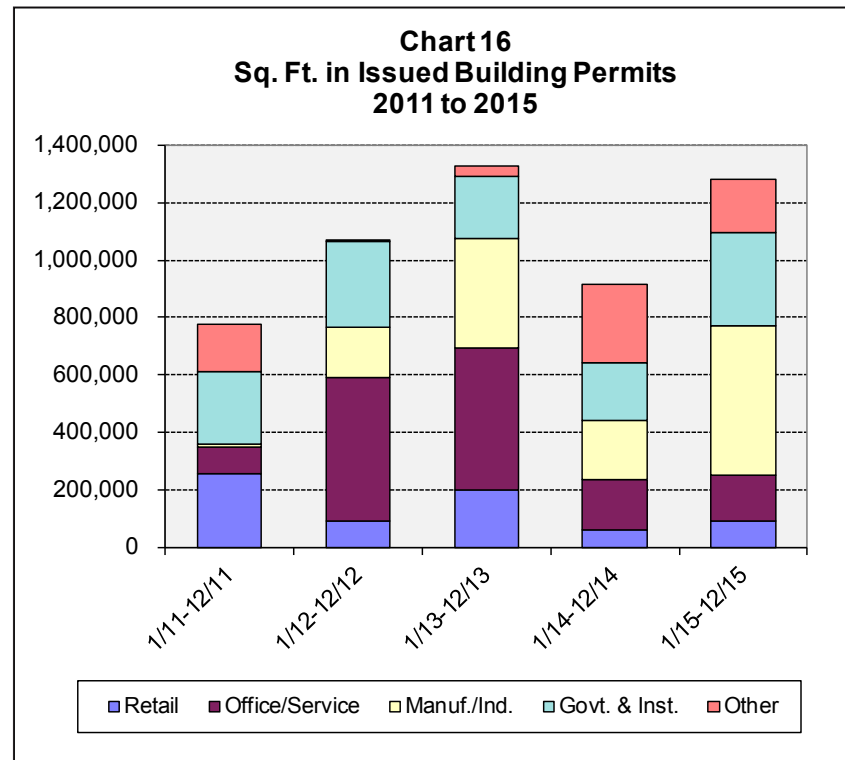


Table 62
Building Square Feet in Issued Non-Residential Building Permits
2011 to 2015

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
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
1/15-12/15	92,482	161,620	517,991	321,881	186,173	1,280,147
TOTAL	711,230	1,412,132	1,294,419	1,289,968	664,552	5,372,301
PERCENT	13.2%	26.3%	24.1%	24.0%	12.4%	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, 2015 to December 31, 2015 could accommodate an estimated 2,945 employees (Table 64). About 51% of the potential jobs are located in Downtown Columbia, mostly office jobs. About 23% of the potential jobs are located in other parts of Columbia, 15% are located in the Southeast, 6% in Elkridge, 3% in Ellicott City, and 2% in the Rural West.

Countywide, 1,494 potential jobs, about 51% of the total, are office/service jobs. Another 707 are government & institutional jobs (24%), 428 manufacturing/extensive industrial jobs (15%), and 316 retail jobs (11%).

Table 64
Potential Employment from Approved Non-Residential SDP's in 2015
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	137	1,334	0	22	1,493	51%
All Other Columbia	51	4	121	502	678	23%
Elkridge	17	107	0	56	181	6%
Ellicott City	43	49	0	0	92	3%
Rural West	68	0	2	0	70	2%
Southeast	0	0	305	127	431	15%
TOTAL	316	1,494	428	707	2,945	100%
PERCENT	10.7%	50.7%	14.5%	24.0%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 65 below, there is a potential of 2,039 new jobs that could be accommodated based on issued building permits. About 32% of the total are potential office/service jobs, mostly in the Southeast. This is followed by 32% government and institutional jobs, 25% manufacturing/extensive industrial jobs and 11% retail jobs.

Table 65
Potential Employment from Issued Building Permits in 2015
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	66	0	0	0	66	3%
All Other Columbia	31	3	0	568	602	29%
Elkridge	27	80	60	7	173	8%
Ellicott City	26	90	0	31	147	7%
Rural West	12	13	2	3	30	1%
Southeast	70	462	456	35	1,022	50%
TOTAL	231	646	518	644	2,039	100%
PERCENT	11.3%	31.7%	25.4%	31.6%	100.0%	

State DLLR and U.S. BEA Employment Estimates

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

DLLR reports statistics produced by Maryland’s ES-202 Program. The data are generated and published on a quarterly basis and include all workers covered by the Unemployment Insurance Law of Maryland and the unemployment compensation for federal employees program. Together these two account for approximately 98% of all wage and salary civilian employment. Since wage and salary employment represents approximately 93% of total civilian employment, DLLR estimates that their data reflects over 91% of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 29% of Howard County’s employment in 2014 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 2015. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,313 jobs per year for the last 15 years. Job losses for 2009 and 2010 due to the most recent recession and a few other years as reported by DLLR have lowered this longer term average.

Jobs reported by the BEA through 2014 (the latest year available) result in an annual average of 3,375 new jobs from 2000 to 2014.

For the most recent reporting period, from 2014 to 2015, the State reports an increase of 3,580 jobs in Howard County. This follows a small 449 job decrease the previous year, which had followed three years of significant 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 2014 and 2015. In the first quarter of 2015, DLLR reported that there were 159,531 jobs in Howard County with an average weekly wage of \$1,238. This compares to 156,400 jobs one year earlier with an average wage of \$1,188. This is a 1.5% 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	190,243	1,222
2009	142,266	(5,307)	188,212	(2,031)
2010	141,169	(1,097)	189,534	1,322
2011	147,357	6,188	195,567	6,033
2012	154,504	7,147	201,755	6,188
2013	156,400	1,896	205,083	3,328
2014	155,951	(449)	206,433	1,350
2015	159,531	3,580		
Average		2,313		3,375

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, 2014 and 2015

Job Type	2014		2015	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	595	\$1,647	622	\$1,675
State Government	1,484	\$910	1,844	\$963
Local Government	14,741	\$1,044	14,740	\$1,080
Subtotal/Average	16,819	\$1,054	17,206	\$1,089
Goods Producing				
Natural Resources and Mining	255	\$643	265	\$658
Construction	9,893	\$1,227	9,948	\$1,211
Manufacturing	7,497	\$1,433	7,572	\$1,573
Subtotal/Average	17,645	\$1,306	17,785	\$1,357
Service Providing				
Trade, Transportation, and Utilities	32,660	\$1,028	32,898	\$1,063
Information	3,818	\$2,073	3,310	\$2,118
Financial Activities	8,903	\$1,816	9,314	\$1,896
Professional and Business Services	40,912	\$1,678	42,101	\$1,657
Education and Health Services	16,744	\$899	18,197	\$929
Leisure and Hospitality	13,925	\$372	14,241	\$370
Other Services	4,525	\$669	4,479	\$684
Subtotal/Average	121,487	\$1,231	124,540	\$1,242
TOTAL	155,951	\$1,220	159,531	\$1,238

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

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