



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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With countywide summaries from 2014

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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 27th 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.

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. This is followed by

a discussion on current APFO restrictions in Howard County and recent amendments to APFO. This section concludes with a summary of lot densities for housing units constructed in 2018.

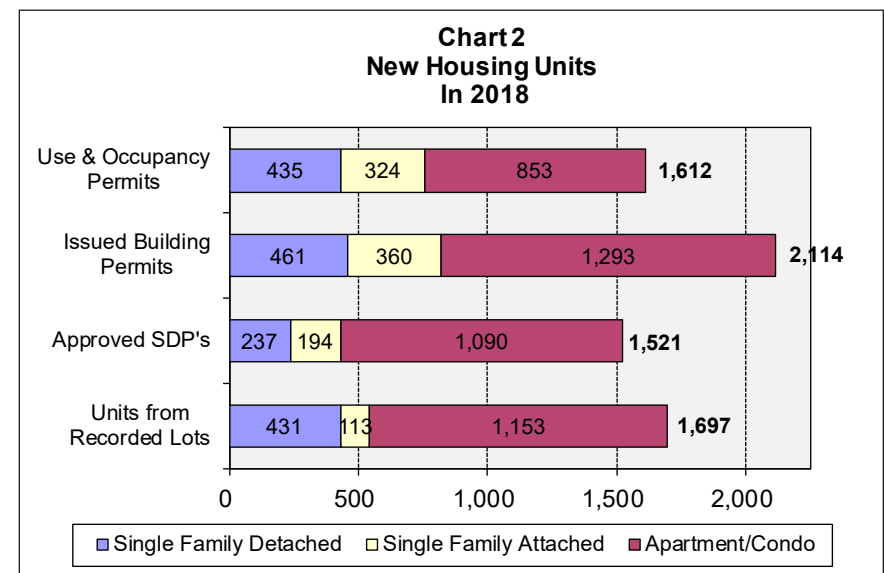
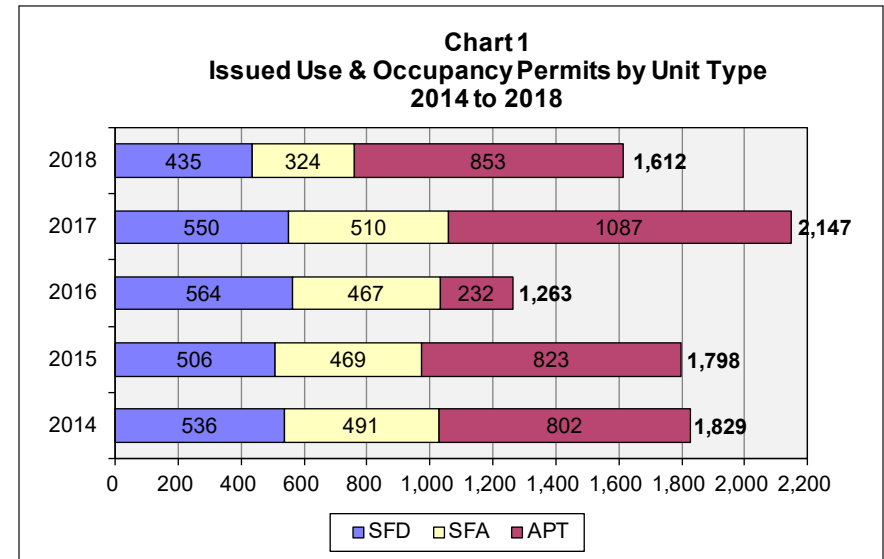
The reporting of these additional items meet the State planning requirements and also enable a better understanding of Howard County's land development issues, policies and goals.

Residential Development

Total Housing Activity

- During the latest reporting period, from January through December 2018, 1,612 housing units were built. This is a decrease from the previous reporting period when 2,147 units were built, and the fourth least number built over the last five years (Chart 1).
- Of the 1,612 completed units last year, 27% were single family detached units, 20% were townhouse units and 53% 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 1,730 new housing units built in the County. About 30% of these have been single family detached units, 26% single family attached or townhouse units, and 44% apartment units (including both rental and condo).
- Last year, 28% of all units were built in the Southeast, 27% in Downtown Columbia, 17% in Ellicott City, 15% in Elkridge, 7% in the Rural West and 5% in non-Downtown Columbia. (See the map on Page 6 that show the five planning areas and Downtown Columbia.)
- There were 2,114 building permits issued (housing starts) during 2018 (Chart 2). This is 78% more than the 1,185 permits issued in 2017.
- In 2018, there was potential for 1,697 housing units from recorded lots and 1,521 units approved in site development plans (Chart 2).
- As of December 31, 2018, there were 6,937 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 8,732 units in process for the prior reporting period (December 31, 2017). Many of these units are part of phased plans.
- A significant number of the in-process units—5,427 or 78% of the total 6,937—are included in future phases of phased projects with development planned as far out as 2027. The larger phased plans include Laurel Park Station, Maple Lawn South and the Milk Producers in the Southeast; The Overlook at Blue Stream and Oxford Square in Elkridge; Turf Valley, Westmount, Chapelgate and Taylor Highlands in Ellicott City; Simpson Oaks in Columbia; and the Crescent and Lakefront neighborhoods in Downtown Columbia.

- Countywide, 16% of the units in process on December 31, 2016, were single family detached units. About 15% were single family attached units and another 69% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 83 age-restricted housing units built in 2018, 5% of the 1,612 total units built in the County. Of these, 35 were townhouse units and 48 were apartment units.
- As of December 31, 2018, there were 114 age-restricted units in the planning process. This includes 90 apartment units in Brightview Columbia and 24 townhouse units as part of Eden Brook. For the previous reporting period there were no age-restricted units in the subdivision process.
- Since the 2004/2005 DMS, which was the first time age-restricted units were reported soon after recently passed regulatory changes enabling more of these type of units, 17% of all new homes built in Howard County have been age-restricted.

Moderate Income Housing Units (MIHU)

- During 2018 there were 136 MIHU units in approved plans—24 townhouse units and 112 apartment units. This is slightly less than the 149 approved MIHU units the previous reporting period.
- As of December 31, 2018, there were 701 MIHU units in process—153 townhouse units and 548 apartment or condo units. About 39% of the units are in Downtown Columbia, 24% in Elkridge, 23% in the Southeast, 13% in Columbia, and 1% in non-Downtown Columbia. There were 843 MIHU units in process the previous reporting period.
- Of the 701 MIHU units in process, 9 are in the Brightview Columbia age-restricted proposal.

Rural Land Preservation

- No new properties were added to the County's Agricultural Land Preservation Program in 2018. However, there are two properties currently being evaluated that may be added to the program in 2019. Additionally, a property owner applied to the Maryland Agricultural Land Preservation Foundation (MALPF) in 2018, with acquisition likely to occur in 2019. Approximately 197 acres of land in 13 parcels were dedicated as environmental preservation easements in 2018 through the cluster subdivision process.
- Preservation easements in the Rural West now total 31,840 acres. This includes 22,762 acres of agricultural preservation easements and 9,078 acres of environmental preservation parcels dedicated through the sub-

division process. This totals 34% of all land in the Rural West. Including park land, WSSC land and other environmental easements, 46% of the Rural West is now permanently preserved.

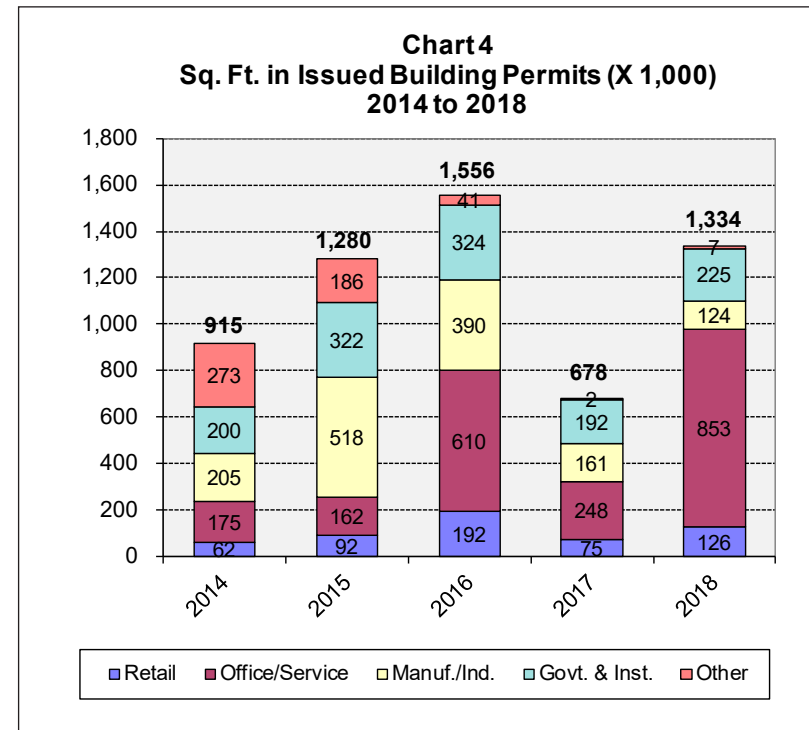
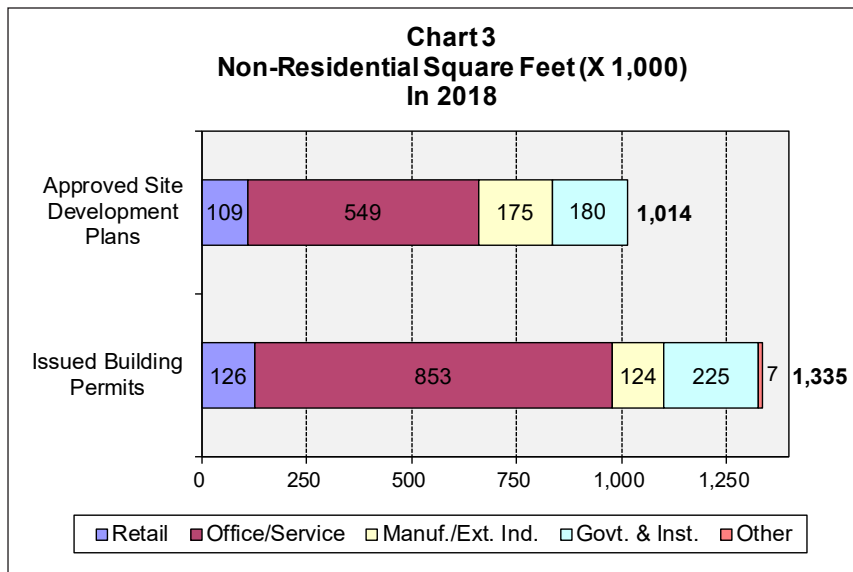
Land Preservation in the East

- In 2018, no new land was preserved in eastern Howard County as part of the Neighborhood Preservation Program. That program, which began in 2008, currently includes a total of 73 acres of permanently preserved land in the east and has allowed for the density transfer of 129 dwelling units to other parts of eastern Howard County.
- Including all other preservation easement types—historic, Maryland environmental and other land trusts, and agricultural easements—a total of 803 acres are permanently preserved in eastern Howard County.
- When including County and State parks, WSSC land, non-County open space such as HOA land and Columbia Association open space, the total preserved land in eastern Howard County is 18,620 acres, 28% of all land in the east.

Non-Residential Development

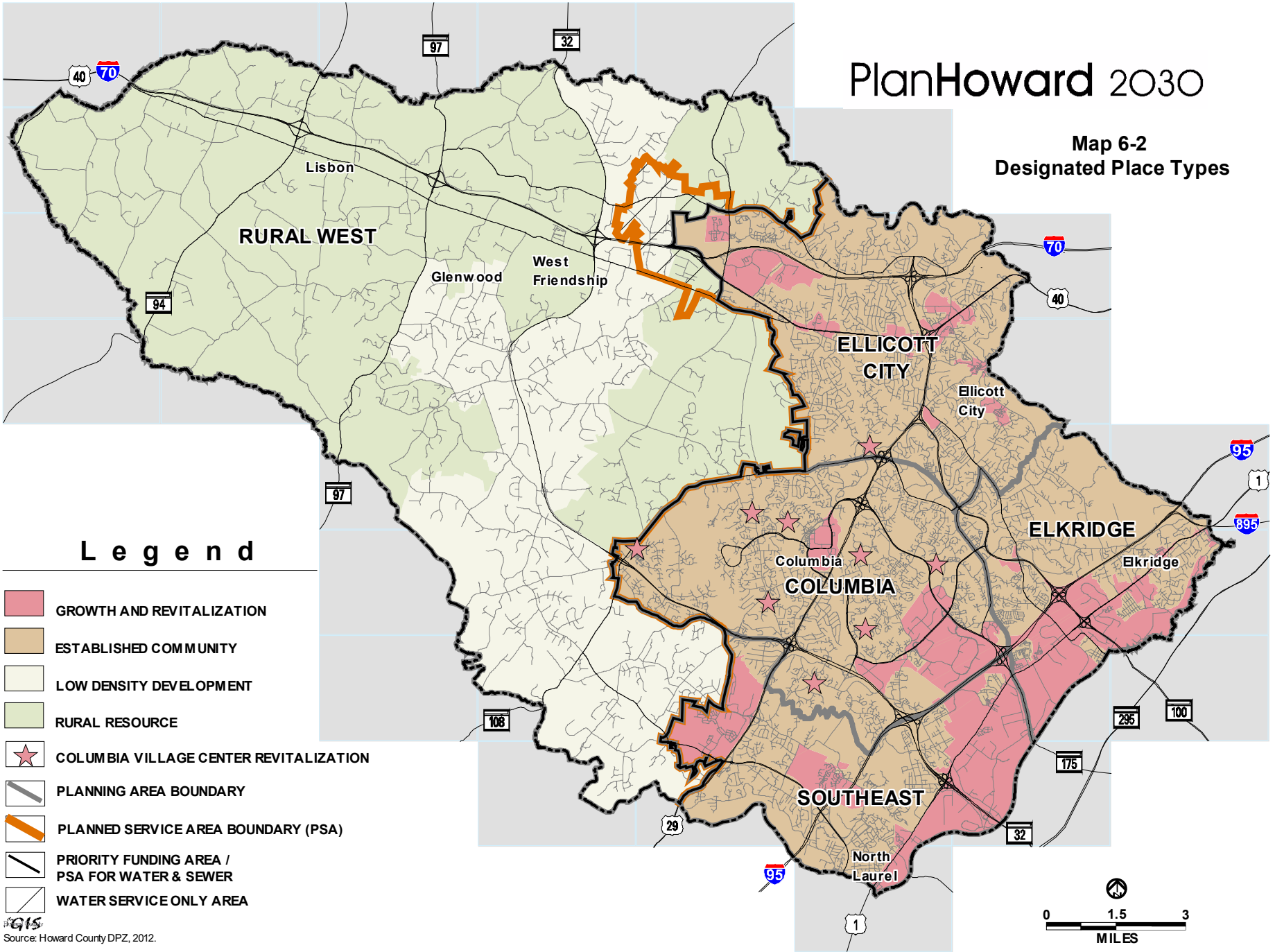
- In 2018, about 1 million square feet of building space were approved in site development plans. Building permits were issued for 1.3 million square feet. (Chart 3).
- As shown in Chart 4 there was an increase in the square footage of issued building permits last year, from 678,000 square feet issued in 2017 to 1.3 million square feet issued in 2018, which was the second highest amount in the last five years.
- About 48% of the new building space constructed last year is located in the Southeast, 32% in Downtown Columbia, and 16% in the non-Downtown parts of Columbia. About 2% of the total was constructed in Elkridge, and 1% each in Ellicott City and the Rural West.
- Over the last five years, there was an annual average of about 916,000 square feet in approved non-residential site development plans and 1.15 million square feet in issued non-residential building permits.

- As of December 31, 2018, there were 1.1 million square feet of building space under plan review in non-residential site development plans. This is 40% less than the 1.8 million square feet under review the previous year.
- According to the State Department of Labor, Licensing and Regulation, Howard County gained 1,116 jobs last year (1st quarter 2017 to 1st quarter 2018 estimates). The total number of jobs in Howard County as of the 1st quarter 2018 was 168,817.



PlanHoward 2030

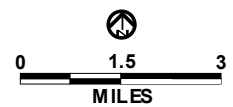
Map 6-2
Designated Place Types



Legend

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

Source: Howard County DPZ, 2012.



Smart Growth Information

Smart, Green and Growing Legislation

This section of the DMS report has been produced to satisfy amendments to State law enacted in 2009, known collectively as the Smart, Green and Growing legislation. All jurisdictions in Maryland are required to report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions. 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

The following highlights General Plan amendments and other adopted legislation in 2018 in support of the current General Plan, known as *Plan-Howard 2030*.

CB 2-2018 — Amendments to PlanHoward 2030

This bill amends *PlanHoward 2030*, the general plan for Howard County, to reduce the number of allocations in the Growth and Revitalization category and to increase the number of allocations in the Established Communities category beginning in the 2020 allocation year.

CR 47-2018 — Annual Action Plan for Housing

This resolution adopts Howard County's Annual Action Plan for housing and community services to qualify for the receipt of federal Community Development Block Grant and Home Investment Partnership Program funds.

CR 48-2018 — Central Maryland Transit Development Plan

This resolution endorses the Central Maryland Transit Development Plan as a guide for future transit development in Howard County and in the Central Maryland region.

CB 56-2018 — Tiber Branch Watershed and Plumtree Branch Watershed Safety Act

This bill temporarily prohibits the issuance of certain permits and certain approvals of development plans and zoning changes for property that drains in whole or in part to the Tiber Branch Watershed (and amended to also include the Plumtree Branch Watershed) and to study flooding events that threaten public health, safety, and welfare. The bill requests the Department of Planning and Zoning, the Department of Public Works, and other County agencies to study past, present, and future land uses, drainage infrastructure, storm water management, and flood mitigation, and all other factors related to flooding in the Watersheds, and report and make recommendations on changes to land uses, drainage infrastructure, storm-water management, and flood mitigation.

CB 59-2018 — Planned Service Area Amendment

This bill amends *PlanHoward 2030* by adjusting the Planned Service Area boundary for water and sewer service to include approximately 61 acres of property located west of Clarksville Pike (MD Route 108) and south of Sheppard Lane in Clarksville, adjusts the Growth Tier Map of Howard County to reflect the incorporation of this property into Growth Tier 1, and designates this property as a Targeted Growth and Revitalization Designated Place Type.

CB 61-2018 — Ellicott City Flood Mitigation Plan

This bill enacts emergency appropriations to implement the Ellicott City flood mitigation plan, and declares it as an Emergency Bill necessary to meet a public emergency affecting life, health or property.

CB 63-2018 — Agricultural Preservation Act Amendments

This bill amends the purpose of the Howard County Agricultural Land Preservation Act, amends the title of the Howard County Agricultural Land Preservation Act to be the Howard County Agricultural Sustainability and Land Preservation Act, amends the name of the Agricultural Land Preservation Board to be the Agricultural Preservation Board, clarifies the duties and responsibilities of the Agricultural Preservation Board, and reorganizes the Executive Branch of County Government to allow the Office of Community Sustainability to act as the Executive Secretary to the Agricultural Preservation Board.

CR 67-2018 — Moderate Income Housing Unit Fee-In-Lieu

This resolution sets the fee-in-lieu rate for moderate income housing.

CB 74-2018 — Amendments to CB 56-2018

This bill repeals and reenacts the Exemptions Subsection of Section 6 of Council Bill 56-2018 to clarify that certain exemptions are not to increase the amount of impervious surface in the watershed, creates exemptions to the "Tiber Branch Watershed and Plumtree Branch Watershed Safety Act" for the relocation of historic properties and the Department of Planning and Zoning and Hearing Authority approvals, and specifies that certain county approvals were allowed as exemptions.

CB 76-2018 — Historic Structures Certificate of Approval Process

This bill amends the Howard County Code to create an approval requirement for the Certificate of Approval process for certain actions involving historic structures and public safety.

CR 114-2018 — Maryland Agricultural Land Preservation Foundation

This resolution approves an application by the owners to sell an agricultural land preservation easement on their property, located at 830 Morgan Station Road in Woodbine, Howard County, Maryland and shown as Tax Map 8, Parcel 1, consisting of approximately 26.6 acres to the Maryland Agricultural Land Preservation Foundation.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County in 2018.

CB 16-2018 — Modification of Piecemeal Zoning Map Amendment Process

This bill amends the Howard County Code to modify the process for piecemeal map amendments and development plan approvals by the Zoning Board and generally relating to Zoning Board hearings.

CB 17-2018 — Further Modification of Piecemeal Zoning Map Amendment Process

This bill amends the Howard County Zoning Code to provide that in piecemeal amendment cases that the Zoning Board initially limit the hearing to the evidence relevant to the applicable criteria which would justify the requested rezoning.

CB 38-2018 — Nursing Homes and Residential Care Facilities

This bill amends the Howard County Zoning Regulations to permit nursing homes and residential care facilities as a matter of right in the Planned Service Area for Water and Sewage area of the B-2 zoning district.

CB 46-2018 — Single Site Historic Districts

This bill amends the Howard County Zoning Code to modify the process for establishing Single Site Historic Districts, and generally relating to Single Site Historic Districts.

Subdivision & Land Development Regulation Amendments (and related)

The following highlights amendments to the Subdivision & Land Development Regulations (and other related land use code amendments) that were approved in Howard County in 2018.

CB 1-2018 — Amendments to APFO

This bill amends the Adequate Public Facilities Ordinance by changing the capacities at which elementary and middle school districts are closed to development and adding a new high school capacity test, specifying completion timelines for certain types of road remediation projects, requiring that certain agreements contain certain provisions with regard to the timing of road mitigation projects, adding certain exemptions, amending certain definitions and making technical corrections.

CB 40-2018 — Presubmission Community Meetings

This bill amends the Howard County Code to require presubmission community meetings for projects on publicly owned land and for projects that abut open space.

CR 82-2018 — Housing Unit Allocation Chart

This resolution adopts the Housing Unit Allocation Chart for Fiscal Year 2019 pursuant to the Adequate Public Facilities Act of Howard County.

CR 83-2018 — School Capacity Chart

This resolution adopts the School Capacity Chart, pursuant to the Adequate Public Facilities Act of Howard County, to designate the school regions and school districts that are open for residential development.

Zoning Map Amendments

The following highlights all zoning map amendments including the amendment number, name, and description that were approved in Howard County during 2018. Map 1 shows the location of each.

ZB 115M-2018 — Brightview Senior Living-Columbia

To rezone 6.69 acres of land located on the southeastern corner of Seneca Drive and Martin Road, described as 6680 Martin Road, from R-12 (Residential: Single) to CEF-M (Community Enhancement Floating: Mixed Use).

ZB 1117M-2018 — Michael and Caroline Boosalis

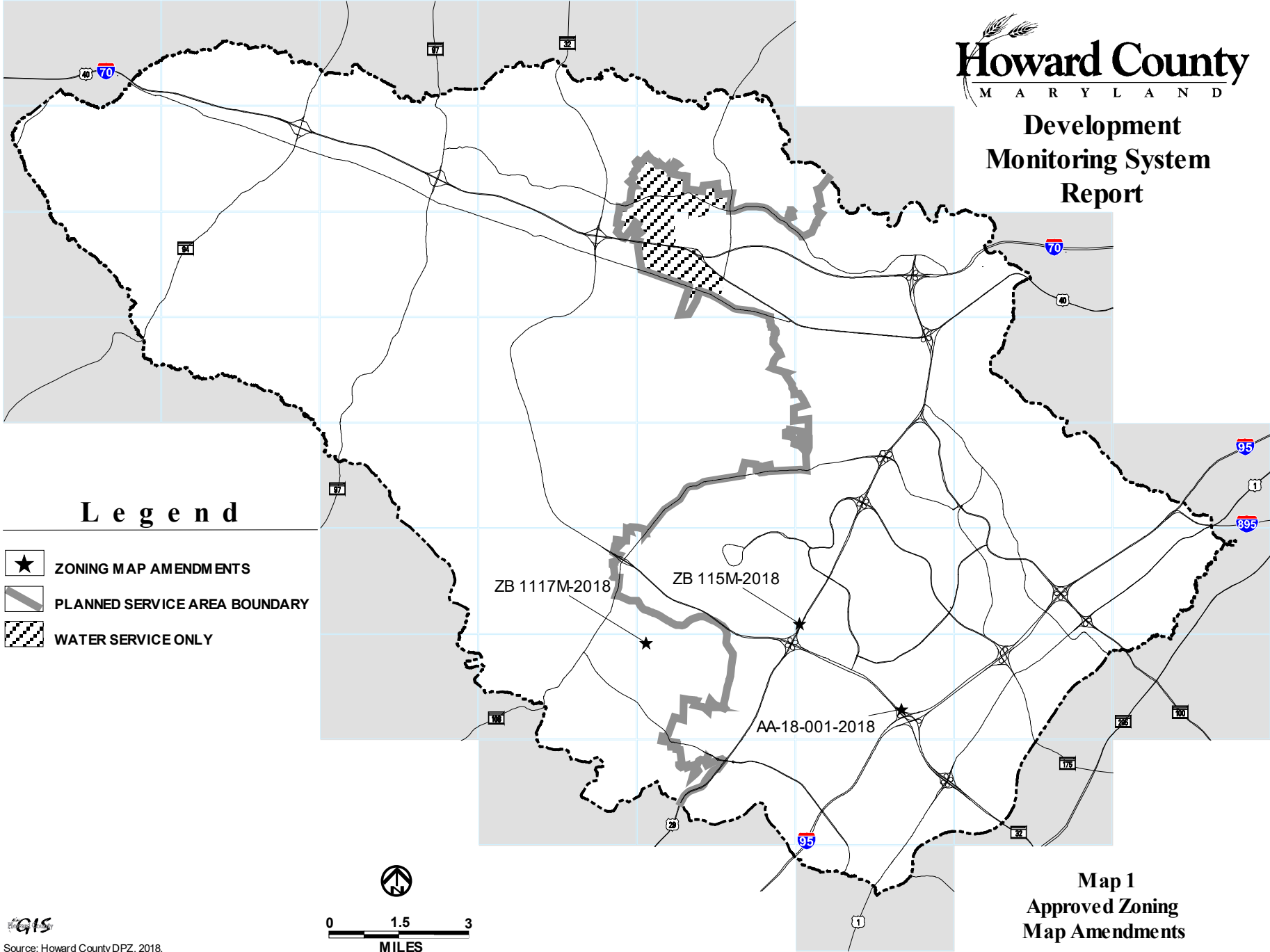
To rezone 1.04 acres of land located on the west side of Hall Shop Road approximately 1,731 feet northeast of Simpson Road, described as 12064 Hall Shop Road, from RR-DEO (Rural Residential-Density Exchange Option) to BR (Business Rural).

AA-18-001-2018 — Michael and Caroline Boosalis




To rezone a portion of land located at 9580 Glen Oaks Lane, from NT (New Town) to R-S-A-8 (Residential: Single Attached), as authorized under the Administrative Adjustment Procedure, Section 100.0.F.2, to correct a map drafting error.

Howard County MARYLAND

Development Monitoring System Report



Legend

-  ZONING MAP AMENDMENTS
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY



Source: Howard County DPZ, 2018.



Map 1
Approved Zoning
Map Amendments

Major Infrastructure

New Roads and Substantial Changes in Roads

In 2018, 6.84 miles of new or extended roadway were constructed in Howard County. These additions were built in 10 new subdivisions as part of developer's agreements executed with the County.

Other road improvements not directly associated with new subdivisions include: safety improvements to Watersville Road from West Watersville Road to 250 east of West Watersville Road; road improvements and widening on Pine Orchard Lane opposite Corporate Court; road improvements on Sheppard Lane north of Preakness Circle Lane; multiple turning lane improvements on Little Patuxent Parkway, Governor Warfield Parkway, and Broken Land Parkway in Downtown Columbia; road improvements on Ten Oaks Road at Route 108 Clarksville Pike; a multi-way stop installed at the intersection of Martin Road and Seneca Drive; a roundabout installed on College Avenue near Village Crest Drive and Bending Sky Way; an acceleration/deceleration lane on Hanover Road near Flory Road; a multi-way stop installed at the intersection of Murray Hill Road and Vollmerhausen Road; a multi-way stop installed at the intersection of Guilford Road and Gerwig Lane; safety improvements on Hall Shop Road near Brown Bridge Road, and sight realignment of Brown Bridge Road.

Detailed information about all roadway construction projects is documented in Howard County's 2018 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 projects in 2018. Renovation and expansion efforts continue to be concentrated within the priority funding area.

Hanover Hills Elementary School

The Hanover Hills Elementary School project was constructed to provide relief to the crowded elementary schools in the northeast region. The school is an adaptation of the original two-story prototype elementary school design, which was designed to accommodate a population of 788 kindergarten through fifth grade students. The environmental sustainability features of the building are anticipated to achieve LEED Gold certifi-

cation. The school is located adjacent to Thomas Viaduct Middle School within the Oxford Square community which was built as a walkable community with access to public transportation.

Waverly Elementary School

The Waverly Elementary School project renovated the original 1990 single story structure. The project included replacement of the modular classrooms with permanent construction, adding 100 seats of capacity, and conversion of the open space pods into individual classrooms. A larger administration suite was created by relocating the office space to the existing gymnasium adjacent to the front entrance. A new, larger gymnasium was constructed and the cafetorium and the music suite were expanded to increase the capacity of each space. Interior spaces were reconfigured to provide better circulation with improved accessibility and new finishes. The project is anticipated to achieve LEED certification.

Other Major Community Facilities and Infrastructure (valued at over \$1 million)

In 2018, Phase II of Blandair Regional Park was completed including the construction of park fields, a pavilion, a comfort station and picnic shelters. The new Elkridge Fire Station was also completed in 2018. Interior alterations and HVAC improvements were completed for the Circuit Court. The East Columbia Branch Library underwent interior alterations. Improvement work continued on the county's wastewater treatment plant with the construction of three new anaerobic digesters. Improvements to Troy Park Phase II were completed with the construction of bleachers, a scoreboard and a press box. The roof replacement project of the Public Safety Complex were also completed in 2018.

In 2018, 15 new transit buses were placed into service—7 fixed route buses leased over 10 years and 8 purchased paratransit buses. In addition, pads, shelters and other passenger amenities were built at 50 Howard County bus stops.

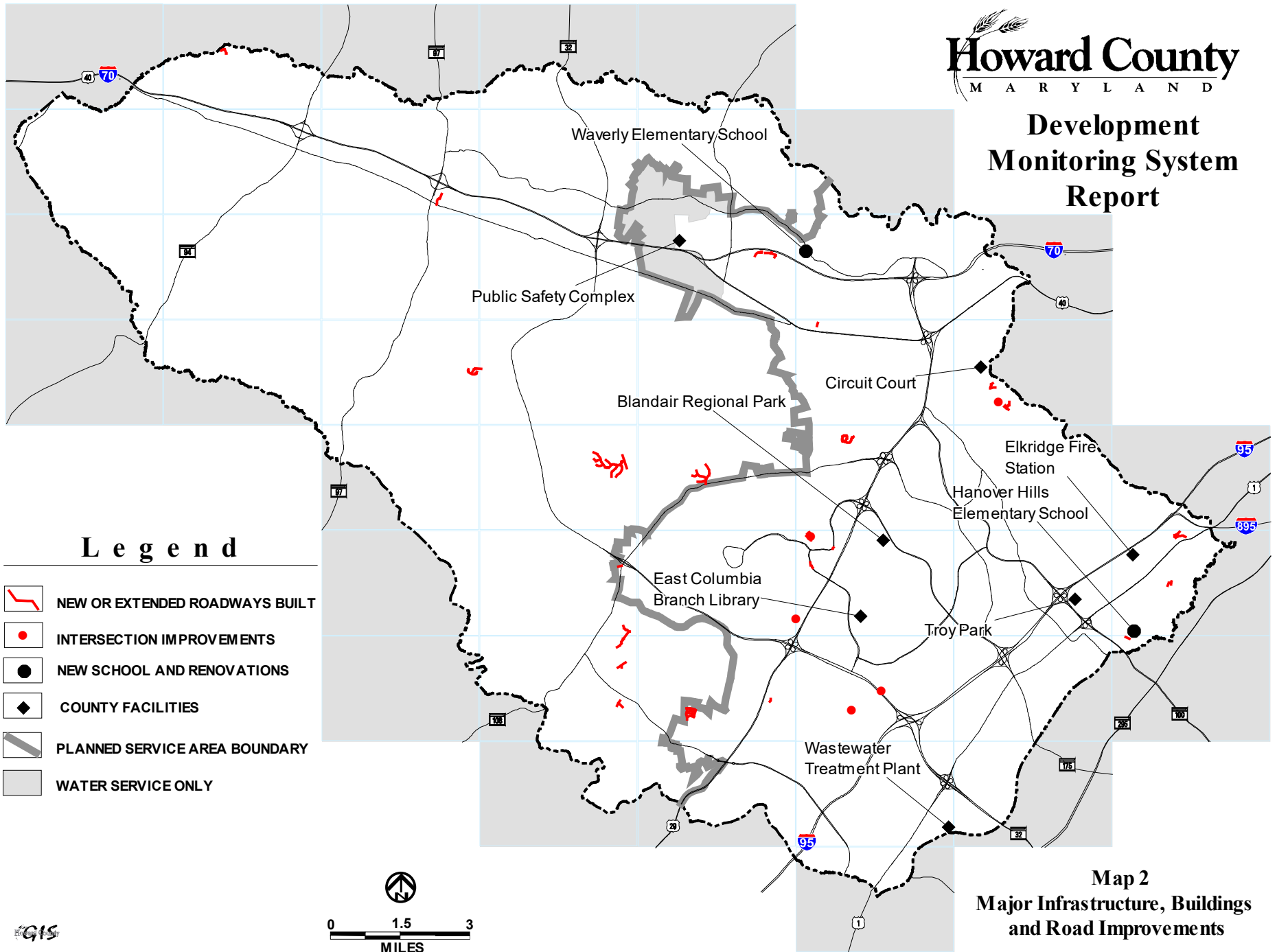
Consistency

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 2018 are located within the Priority Funding Area. Furthermore, many of the bills and resolutions adopted by the Howard County Council support the furtherance of many *PlanHoward 2030* goals and objectives. This includes an amendment to the Adequate Public Facilities Ordinance strengthening the School Capacity and Roads tests, expanding the requirements for pre-submission community meetings, and placing a pause on new building in downtown Ellicott City to allow time for study and the implementation of new stormwater management regulations, among other action items listed beginning on Page 8 above.

**Development
Monitoring System
Report**



Legend

-  NEW OR EXTENDED ROADWAYS BUILT
-  INTERSECTION IMPROVEMENTS
-  NEW SCHOOL AND RENOVATIONS
-  COUNTY FACILITIES
-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY



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



Source: Howard County DPZ, 2018.

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.

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 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 2018

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, public

safety, and other public infrastructure. An allocation is a single housing unit, regardless of type of housing. So if a subdivision plan has 30 single family detached homes proposed, then that plan would need 30 allocations. Likewise, a plan for a 30 unit apartment building or with 30 town-house units, would also need 30 allocations.

The Allocations chart, which must be approved by the County Council, is adopted each July. The current chart was adopted on July 2, 2018. Under Howard County's latest General Plan, *PlanHoward 2030*, allocations are now distributed in this adopted chart by Designated Place Type. At the end of 2018, there were no residential subdivisions delayed due to allocation limitations. This is the third year in a row this has occurred. For all previous years, beginning with the adoption of APFO in 1992, projects have been delayed to due allocation limitations. The last three years have been an exception and reflects the recent slowdown of new subdivision projects submitted for review and approval.

Closed School Restrictions in 2018

After a development project receives allocations, it then takes the Schools Capacity test. To pass this test the elementary school district, the elementary school region, and the middle school district where the project is located must each be under 115% capacity. Howard County has 42 elementary schools and 20 middle schools, each in their own district. There are 6 elementary school regions containing anywhere from 6 to 10 contiguous elementary school districts.

At the end of 2018 there were 8 closed elementary school districts (Talbot Springs, Bryant Woods, Running Brook, Hanover Hills, St. Johns Lane, Fulton, Pointers Run, and Triadelphia Ridge) and 3 closed middle school districts (Ellicott Mills, Dunloggin, and Murray Hill). This resulted in a total of 684 housing units in 18 subdivision plans on hold due to closed school districts. Projects are retested each year after the County Council adoption of a new School Capacity chart and may be held up for up to a maximum of 4 years.

The school system's FY20 5-year capital budget includes planning and construction for 10 new or replacement schools and additions to add student capacity. The final FY20 capital budget will be adopted by the Howard County Council at the end of May, 2019.

Recent Revisions to APFO

The County Council adopted amendments to APFO in early 2018. Significant changes to the law include: 1) exempting moderate income housing units from the allocations requirement, 2) exempting certain low income housing tax credit projects from the schools test on a case by case basis by County Council resolution, 4) eliminating the shared Growth and Revitalization and Established Communities allocation area, 5) decreasing the Growth and Revitalization area from 1,200 allocations per year to 1,000 per year and increasing the Established Communities area allocations to 600 per year from 400 per year, 6) limiting the wait time for projects that are on hold due to the allocations test and schools test to a combined 7 years, 8) lowering the capacity utilization percentage when elementary districts and regions are closed to development from 115% to 105%, and lowering middle school districts from 115% to 110%, and 9) adding a high school district test at a 115% threshold.

The last two items (8 and 9) will become effective with the adoption of the July 2019 School Capacity chart and will have a major impact on development. Unless the Howard County Public School System undergoes a comprehensive redistricting to utilize available systemwide capacity in the near term, it is estimated that as much as 75% of all new residential development will be delayed for up to 4 years due to school districts that will be closed to new development. Howard County's Spending Affordability Advisory Committee recommended that a fiscal impact study be conducted to evaluate the fiscal impact of this reduced residential development pace. The final report for this expected in May, 2019.

Accommodating Future Needs

To effectively accommodate future needs, three important components must all work in conjunction and be in place: 1) effective land use planning and growth management, 2) adequate school funding and construction, and 3) attendance area redistricting when necessary. *PlanHoward 2030* and APFO establish the land use policies and tools for the first item. Continuous review and updates to these policies and regulatory tools must occur to adapt to changing demographics, market conditions, and land use patterns. Fulfilling the second item is a continuous challenge, particularly in the current time of increasing levels of service expectations and the growing capital needs to replace or renovate older schools that are near the end of their useful lives and that had been designed based on decades-old

service level expectations. Furthermore, in recent years school construction costs have been increasing faster than the general rate of inflation. Fulfilling the third item is always challenging given the public's resistance of being assigned to different schools, while also striving to achieve important policy goals including balancing socio-economic equity among schools, keeping neighborhoods together, having a logical feeder system from elementary to middle school and from middle to high school, implementing a fair and efficient pupil transportation system, and other important factors. However, with limited funding and land availability for new schools, redistricting is necessary to utilize available systemwide capacity.

Over the last year, there has been positive dialogue and action to address each of these three items. APFO has been amended, and the county's subdivision and zoning regulations have been evaluated. Furthermore, the next general plan update is on the horizon. Regarding funding, the General Assembly adopted enabling legislation in the recent 2019 session to allow the County Council to raise the school surcharge rate on new residential construction. Furthermore, the 2019 Spending Affordability Advisory Committee has recommended that the county's 1% transfer tax be increased and/or amended to allow more of the collected revenues to go towards new and replacement school construction. Regarding redistricting, the Howard County Board of Education, at the recommendation of the Superintendent, recently voted in the affirmative to evaluate potential larger-scale redistricting for the 2020/21 school year to more effectively utilize existing systemwide capacity. Howard County's newly elected leaders know of the challenges ahead and are working towards a solution.

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 2018. Progress on land preservation is also reported on. The Smart, Green and Growing legislation also requires 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 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.

Lot Density by Planning Area

Table 1 shows the lot density of residential development in Howard County in 2018 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 2018, 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 completed. This also applies to rental and condo apartments and condo townhomes.

The greatest average lot density occurred in Downtown Columbia at 91 units per acre for the 437 units in the Ten.M and m.flats buildings. This was followed by the Southeast at 29 units per acre, Elkridge at 28 units per acre, the non-downtown portion of Columbia at 12 units per acre, and Ellicott City at 10 units per acre. The Rural West, as expected, had the lowest average lot density at 0.81 units per acre. This is shown graphically in Chart 5.

Lot Density Inside Versus Outside the County’s Priority Funding Area (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 44 units per acre. This compares to a much smaller lot density of 0.81 units per acre outside the PFA.

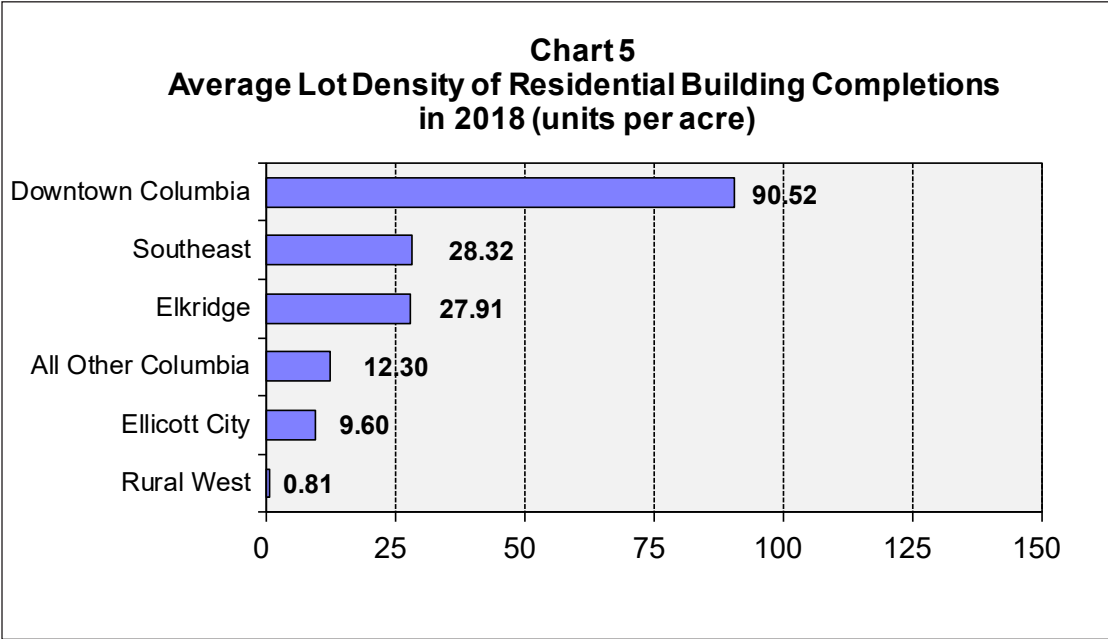
Map 3 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2018 - By Planning Area

Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Downtown Columbia	437	29%	5	1%	90.52
All Other Columbia	84	6%	13	3%	12.30
Elkridge	206	14%	14	4%	27.91
Ellicott City	220	14%	32	9%	9.60
Rural West	116	8%	265	71%	0.81
Southeast	457	30%	45	12%	28.32
TOTAL	1,520	100%	373	100%	40.45

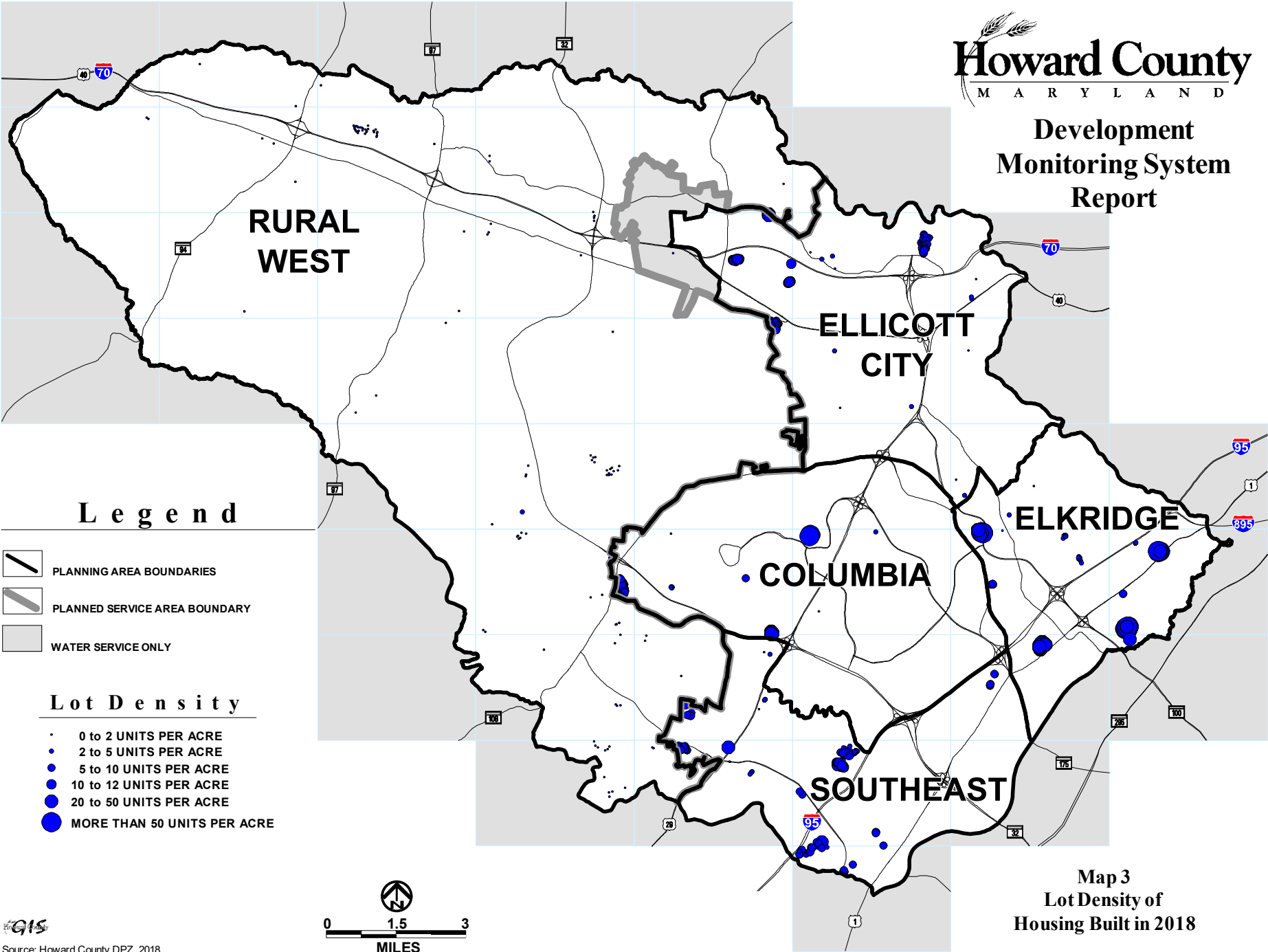
Table 2
Lot Density of Total Units Built in 2018 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,404	92%	109	29%	43.73
Outside PFA	116	8%	265	71%	0.81
TOTAL	1,520	100%	373	100%	40.45





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Lot Density

- 0 to 2 UNITS PER ACRE
2 to 5 UNITS PER ACRE
5 to 10 UNITS PER ACRE
10 to 12 UNITS PER ACRE
20 to 50 UNITS PER ACRE
MORE THAN 50 UNITS PER ACRE



Map 3 Lot Density of Housing Built in 2018

Source: Howard County DPZ, 2018.

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 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 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 2018 to 2030. A total of 1,200 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, 2018, unit counts, 12.0% of all housing units in the County are outside the PFA. The remaining 88.0% 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 12.0% currently to 10.8% in 2030.

Table 3
PlanHoward 2030 Growth Projections
2018 to 2030

Inside PFA	23,600	95.2%
Outside PFA	1,200	4.8%
Total	24,800	100.0%

Table 4
Total Built Units in Howard County
September 30, 2018

Inside PFA	105,567	88.0%
Outside PFA	14,384	12.0%
Total	119,951	100.0%

Table 5
Total Units by 2030 based on PlanHoward 2030

Inside PFA	129,167	89.2%
Outside PFA	15,584	10.8%
Total	144,751	100.0%

Resources to Achieve Goal

Besides the County's APFO described above that regulates the timing and location of growth, the Agricultural Land Preservation Program, described in detail beginning on Page 48 of this report, also helps reduce development capacity outside of the PFA while preserving land. The County's rural zoning is an additional mechanism preserving environmental or agricultural easements in place of housing units through a density transfer mechanism. 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 the 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 2018 were recorded or in existence prior to 2014, 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, 2018, through December 31, 2018, there was potential for 1,697 housing units from recorded lots countywide in 84 subdivision plans totaling 1,779 acres (Table 6). Elkridge had the most with 748 units, 44% of the total. Downtown Columbia had 509 units, 30% of the total. Ellicott City had potential for 167 units, 10% of the total. There were 113 units in recorded subdivision plans in the Southeast (7%), 112 units in the rest of Columbia (7%), and 48 units in the Ru-

ral West (3%). These represent net new unit potential and do not include total recorded lots from resubdivisions. For example, resubdivisions may combine existing lots to create a smaller number of new lots compared to the original. Or, subdivisions may be recorded to simply adjust lot lines or add easements. If known, condo and apartment units are included in the unit total for large parcel recordations.

Of the total 1,779 acres recorded, 1,041 acres, or about 59%, were in the Rural West. It should be noted that recorded acreage is not necessarily a clear indicator of development activity given that these figures include subdivisions and resubdivisions with the sole purpose of revising lot lines or adding easements resulting in no additional units.

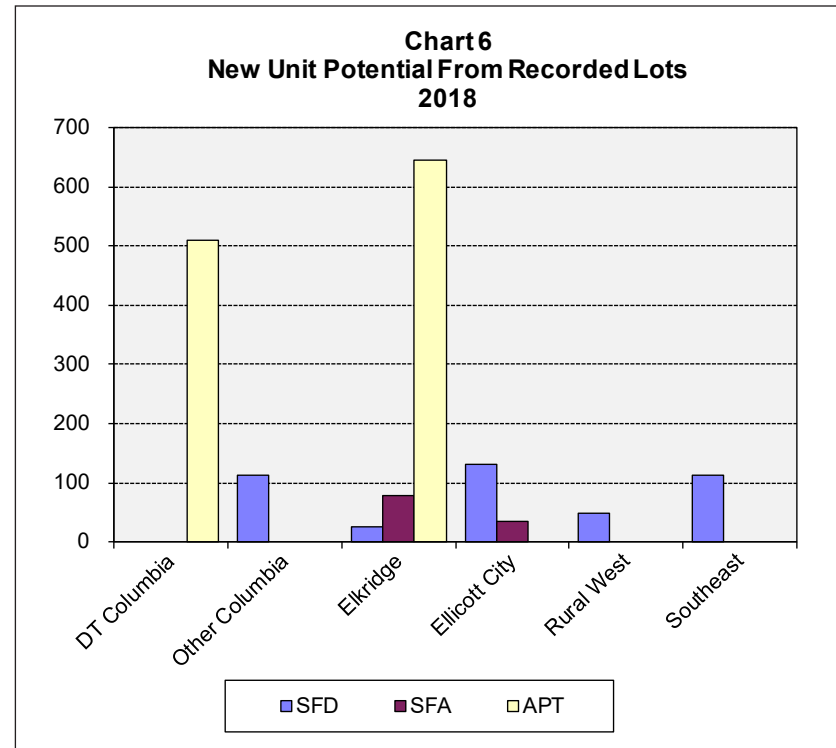
Table 7 shows new units from recorded lots by unit type. Of the 1,697 units from recorded lots, 431 are for single family detached units (SFD), 113 are for single family attached or townhouse units (SFA), and 1,153 are for apartment units (APT). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions in 2018

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	509	30%	2	2%	18	1%
All Other Columbia	112	7%	12	14%	117	7%
Elkridge	748	44%	14	17%	156	9%
Ellicott City	167	10%	16	19%	261	15%
Rural West	48	3%	25	30%	1,041	59%
Southeast	113	7%	15	18%	186	10%
TOTAL	1,697	100%	84	100%	1,779	100%

Table 7
Unit Potential from Recorded Lots by Unit Type in 2018

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	509	0	509	30%
All Other Columbia	112	0	0	0	112	7%
Elkridge	26	78	644	0	748	44%
Ellicott City	132	35	0	0	167	10%
Rural West	48	0	0	0	48	3%
Southeast	113	0	0	0	113	7%
TOTAL	431	113	1,153	0	1,697	100%
PERCENT	25%	7%	68%	0%	100%	



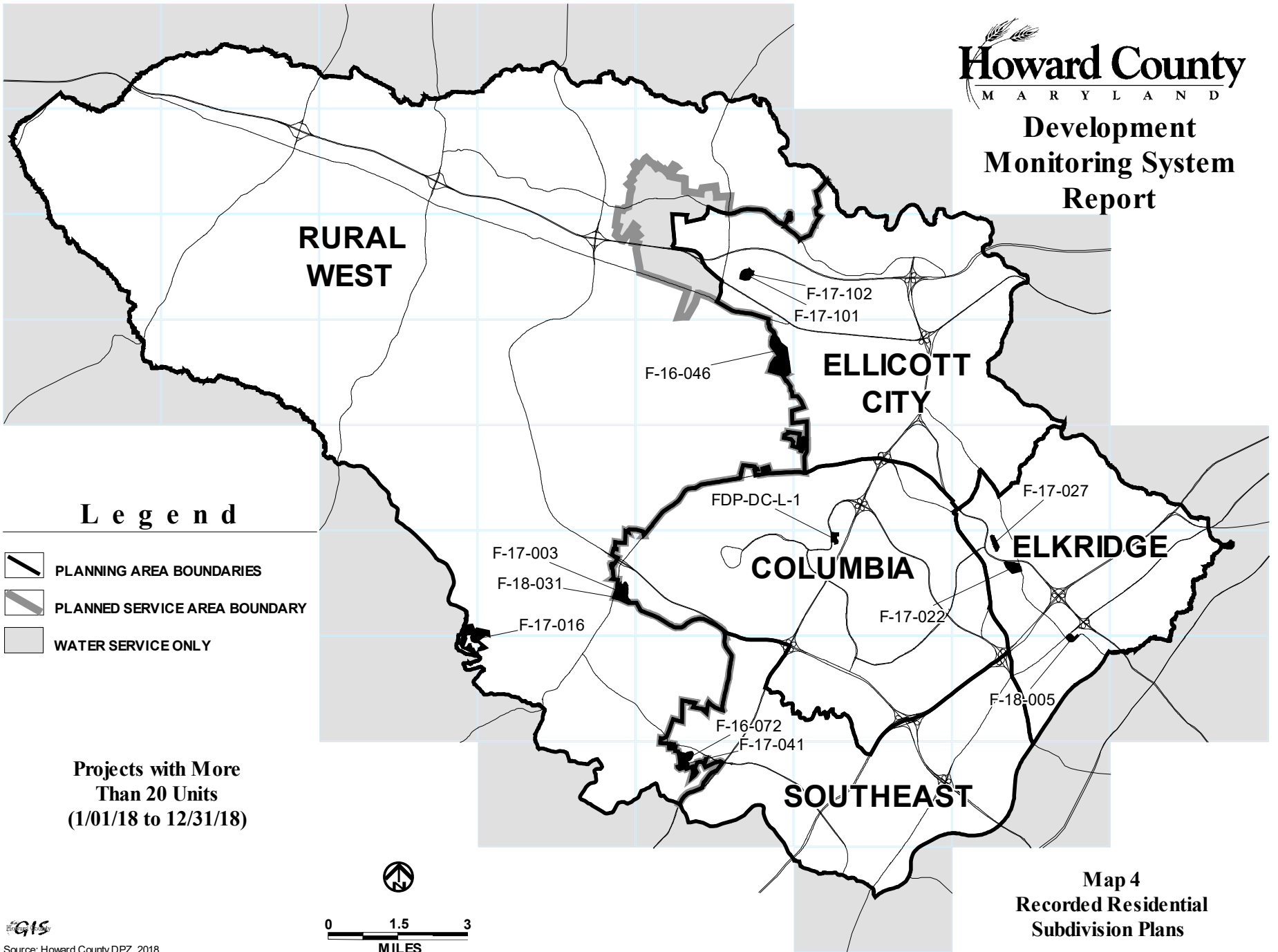
Last Year's Projects - Greater than 20 Units

Of the total 1,697 units from lots recorded for the latest reporting period, 1,624 or about 96% were in subdivisions consisting of more than 20 units. These larger subdivisions, shown in Table 8, are located in all six planning areas. The precise location of these plans are shown on Map 4.

These larger recorded plans include the final development plan for the Lakefront Core in Downtown Columbia; The Enclave at River Hill in Columbia; The Wexley at 100, Corridor Square, and Trotter's Knoll in Elkridge; Westmount and Caperton Village at Turf Valley in Ellicott City; the Crawford Subdivision in the Rural West; and Maple Lawn South in the Southeast.



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Projects with More Than 20 Units (1/01/18 to 12/31/18)



Map 4 Recorded Residential Subdivision Plans



Source: Howard County DPZ, 2018.

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 20 Units in 2018

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Downtown Columbia	FDP-DC-L-1	Lakefront Core	APT - 41 MIHU	509	509
All Other Columbia	F-17-003	Enclave at River Hill - Phase 2	SFD	70	100
	F-18-031	Enclave at River Hill - Phase 3	SFD	30	
Elkridge	F-17-022	The Wexley at 100	APT - 40 MIHU	394	722
	F-18-005	Corridor Square	APT - 38 MIHU	250	
	F-17-027	Trotter's Knoll - Section 1	SFA - 8 MIHU	78	
Ellicott City	F-16-046	Westmount - Phase 2	SFD	73	159
	F-17-101	Caperton Village at Turf Valley - Phase 1	SFA, SFD	50	
	F-17-102	Caperton Village at Turf Valley - Phase 2	SFD	36	
Rural West	F-17-016	Crawford Subdivision	SFD	22	22
Southeast	F-16-072, F-17-041	Maple Lawn South	SFD	112	112
TOTAL					1,624

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in 2014. Over this time period lots for 6,241 units countywide in 489 subdivision plans totaling 11,361 acres were recorded. This equates to an annual average of 1,248 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 9
Recorded Residential Subdivision, 2014 to 2018

Year	Units	Plans	Acreage
2014	1,629	122	2,517
2015	908	100	2,570
2016	778	99	2,749
2017	1,229	84	1,746
2018	1,697	84	1,779
TOTAL	6,241	489	11,361
ANNUAL AVG.	1,248	98	2,272

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 2,204 single family detached units, 35% of the total 6,241. A total of 1,600, 26%, were for single family attached units and the remaining 2,437, 39%, were for apartments units (rental and condo).

Table 10
Unit Potential From Recorded Lots by Unit Type, 2014 to 2018

Year	SFD	SFA	APT	MH	Total
2014	686	488	455	0	1,629
2015	546	362	0	0	908
2016	184	311	283	0	778
2017	357	326	546	0	1,229
2018	431	113	1,153	0	1,697
TOTAL	2,204	1,600	2,437	0	6,241
PERCENT	35%	26%	39%	0%	100%
ANNUAL AVG.	441	320	487	0	1,248

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, 2018, are tabulated and compared with those in process the prior year (as of December 31, 2017).

Number of Plans

There were 16 more residential plans in process as of December 31, 2018, than there were one year earlier – 161 plans in 2018 compared to 145 in 2017 (Table 11).

For the current year, Ellicott City had the greatest number of residential plans in process with 51, followed by the Rural West with 37, Elkridge with 35, the Southeast with 20, Columbia with 7, and Downtown Columbia with 1.

Of the 161 plans in process on December 31, 2018, 95 were final plans, 32 were environmental concept plans, 18 were sketch plans, 12 were preliminary equivalent sketch plans and 4 were preliminary plans.

Number of Potential Units

There were 1,795 less units in process on December 31, 2018, compared to the previous year – 6,937 units compared to 8,732 units (Table 12).

It is important to note that a significant number of the 6,937 units in pro-

Table 11
Number of Residential Subdivision Plans in Process, 12/31/18
(With comparisons to Countywide total as of 12/31/17)

Planning Area	Environmental		Preliminary Equivalent		Final		TOTAL PLANS
	Concept	Sketch	Sketch	Preliminary	Final	Final	
Downtown Columbia	0	0	0	0	1		1
All Other Columbia	3	1	2	0	11		17
Elkridge	12	5	1	0	17		35
Ellicott City	9	7	5	2	28		51
Rural West	3	0	3	0	31		37
Southeast	5	5	1	2	7		20
TOTAL	32	18	12	4	95		161
As of 12/31/17	26	12	24	5	78		145

cess are part of phased projects with building planned for future years. Phasing is often a developer's preference, but also results from APFO regulations that limit the number of allocations available each year. As shown in Table 13, 5,427 units are part of phased plans, with building planned as far out as 2027. Phased plans represent 78% of the total units in process.

The larger phased projects include Laurel Park Station, Maple Lawn South, and the Milk Producers property in the Southeast; The Overlook at Blue Stream and Oxford Square in Elkridge; Turf Valley, Westmount, Taylor Highlands and Chapelgate in Ellicott City; Cedar Creek (formally known as Simpson Oaks) in Columbia; and The Crescent property in Downtown Columbia.

As reflected in Table 12, 17% of the units in process are single family detached units. About 22% are single family attached units and 61% 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, 12/31/18
 (With comparisons to Countywide total as of 12/31/17)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	1,918	0	1,918
All Other Columbia	144	123	90	0	357
Elkridge	117	365	744	0	1,226
Ellicott City	401	703	703	0	1,807
Rural West	247	0	0	0	247
Southeast	299	327	756	0	1,382
TOTAL	1,208	1,518	4,211	0	6,937
PERCENT	17%	22%	61%	0%	100%
As of 12/31/17	1,317	1,038	6,377	0	8,732

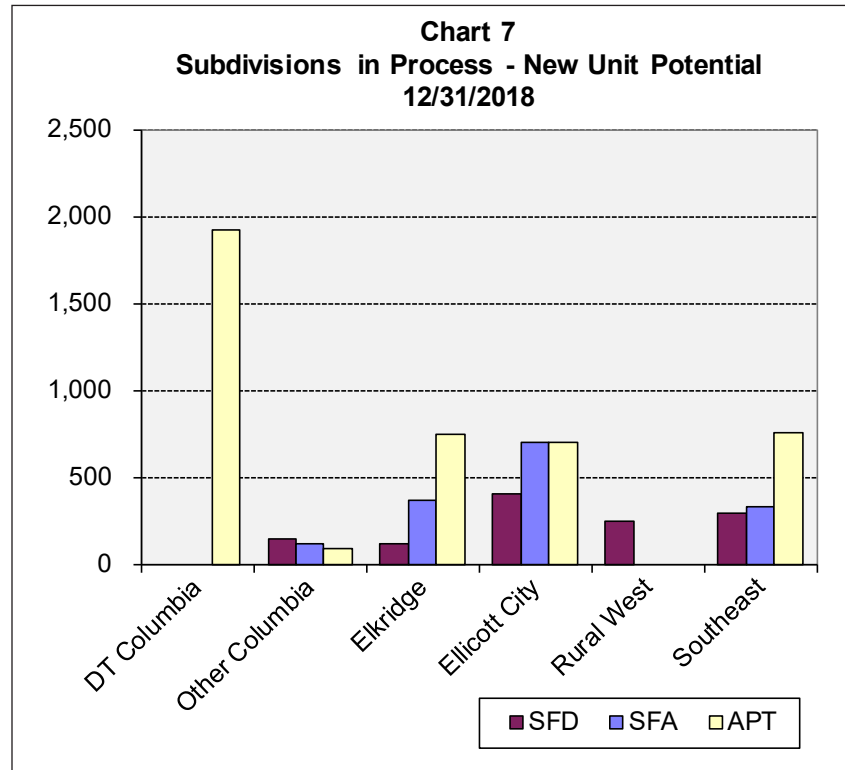


Table 13
Potential Units from Phased Projects in Process, 12/31/18

Planning Area	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	TOTAL
Downtown Columbia	0	218	300	300	300	300	300	200	0	0	1,918
All Other Columbia	55	55	55	19	0	0	0	0	0	0	184
Elkridge	110	250	256	134	0	0	0	0	0	0	750
Ellicott City	50	160	160	248	205	160	160	162	61	0	1,366
Southeast	0	250	310	310	90	60	60	95	34	0	1,209
Rural West	0	0	0	0	0	0	0	0	0	0	0
TOTAL	215	933	1,081	1,011	595	520	520	457	95	0	5,427

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, 12/31/18

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	18	0	0	0	18	4	24	0	0	28
Elkridge	17	26	386	0	429	17	0	0	0	17
Ellicott City	60	302	391	0	753	140	88	164	0	392
Rural West	0	0	0	0	0	56	0	0	0	56
Southeast	252	258	756	0	1,266	18	17	0	0	35
TOTAL	347	586	1,533	0	2,466	235	129	164	0	528

Planning Area	Preliminary					Final					TOTAL - 12/31/18				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	1,918	0	1,918	0	0	1,918	0	1,918
All Other Columbia	0	0	0	0	0	122	99	90	0	311	144	123	90	0	357
Elkridge	0	0	0	0	0	83	339	358	0	780	117	365	744	0	1,226
Ellicott City	0	101	58	0	159	201	212	90	0	503	401	703	703	0	1,807
Rural West	0	0	0	0	0	191	0	0	0	191	247	0	0	0	247
Southeast	16	44	0	0	60	13	8	0	0	21	299	327	756	0	1,382
TOTAL	16	145	58	0	219	610	658	2,456	0	3,724	1,208	1,518	4,211	0	6,937

Number of Acres

As of December 31, 2018, a total of 2,385 acres of residential land were in the subdivision process. This is 150 less acres compared to the previous year, at which time there were 2,535 acres in process (Table 15).

Major Projects

Table 16 shows a list of potential units from larger projects with 40 units or more. This list includes comprehensive and phased projects. Map 5 shows the location of these projects. The larger projects in this list include the Crescent property, Cedar Creek (formerly known as Simpson Oaks), Oxford Square, Blue Stream, Dorsey Center, Turf Valley, Taylor Highlands, Westmount, Laurel Park Station and the Milk Producers property. These major projects with 40 or more units total 6,020 units which account for about 87% of the total 6,937 units in the subdivision process.

Table 15
Acreege of Residential Subdivision Plans in Process, 12/31/18
(With comparisons to Countywide total as of 12/31/17)

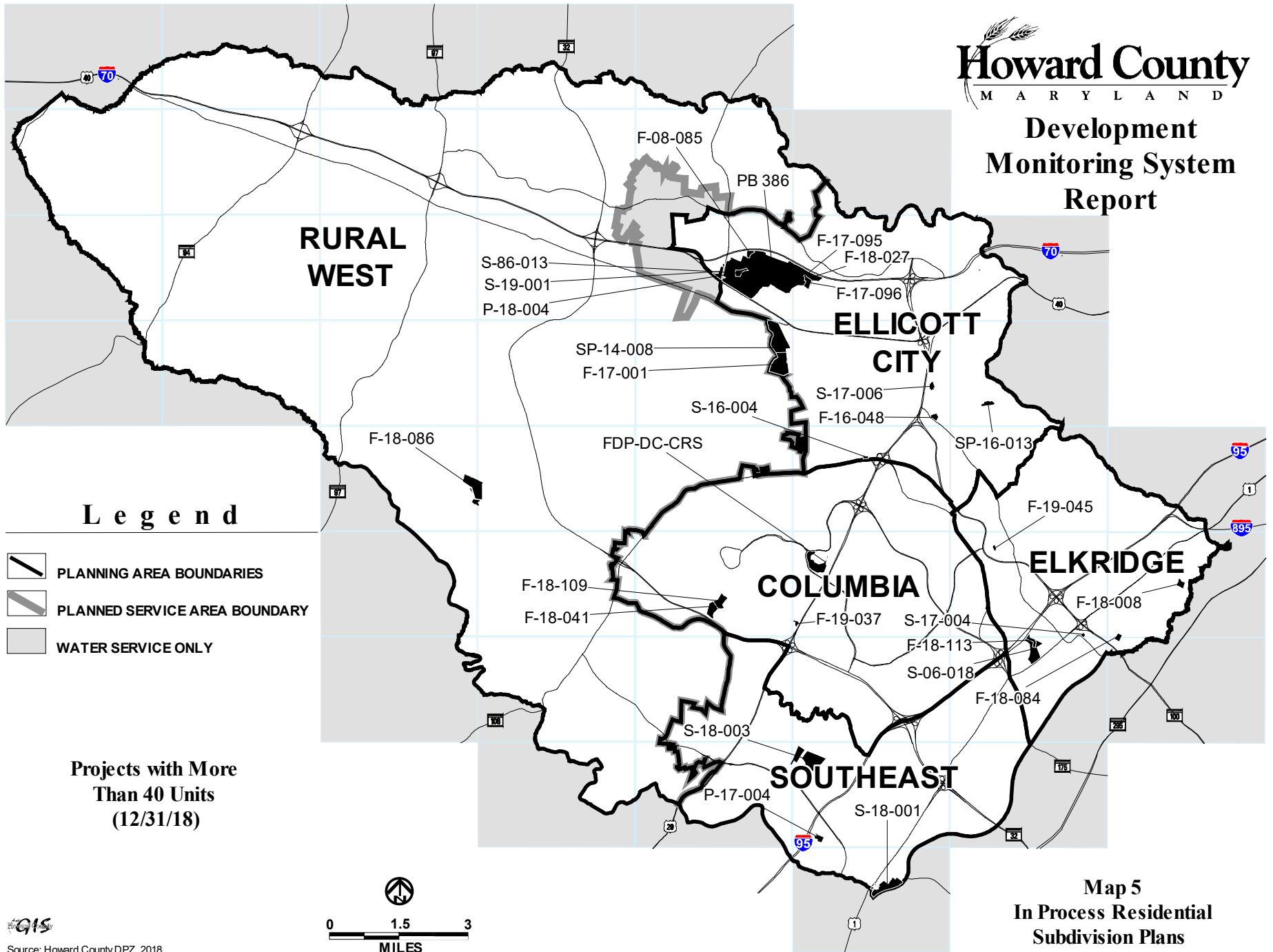
Planning Area	Preliminary Equivalent				TOTAL ADRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	69	69
All Other Columbia	5	7	0	105	117
Elkridge	14	9	0	109	132
Ellicott City	65	267	21	366	720
Rural West	0	88	0	1,009	1,097
Southeast	191	8	28	24	251
TOTAL	275	378	49	1,683	2,385
As of 12/31/17	260	923	123	1,229	2,535

**Table 16
In-Process Residential Subdivision Plans, Projects With More Than 40 Units, 12/31/18**

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	FDP-DC-CRSCNT-1	Downtown Columbia - Crescent	APT - 153 MIHU	1,756	1,756
All Other Columbia	F-18-041, F-18-109 F-19-037	Cedar Creek (Simpson Oaks) - Phases 1 & 2 Brightview Columbia	SFD, SFA APT - Age Restricted	184 90	274
Elkridge	F-18-084 S-17-004 F-18-113 S-06-018 F-19-045 F-18-008	Oxford Square - Parcel H-H Dorsey Center Parcel R Blue Stream Blue Stream - Remaining Phase Trotter's Knoll - Section 1 Elkridge Woods	APT - 63 MIHU APT- 23 MIHU SFA - 34 MIHU APT - 29 MIHU SFA - 8 MIHU SFD	414 230 180 156 78 40	1,098
Ellicott City	S-86-013, PB 386 SP-16-013 F-17-001, SP-14-008 P-18-004 S-19-001 F-18-027 F-16-048 S-16-004 F-17-095, F-17-096 S-17-006 F-08-085	Turf Valley - Remaining Phases Taylor Highlands - Phase 1 Westmount - Remaining Phases The Village at Town Square (in Turf Valley) Chapelgate Ravenwood at Turf Valley (Bluffs) Long Gate Overlook Dorsey Overlook Turf Valley, Pod E - Phases 1 & 2 Dorsey's Ridge Villages at Turf Valley - Phase 3	SFD, SFA, APT SFA, APT - 26 MIHU SFD SFA, APT SFA - 14 MIHU SFA, APT SFA - 5 MIHU SFA - 13 MIHU SFD, SFA SFA, APT - 6 MIHU SFA	469 252 193 153 134 97 79 75 72 52 40	1,616
Rural West	F-18-086	Willowshire	SFD	43	43
Southeast	S-18-001 S-18-003 P-17-004	Laurel Park Station - Phases 2 thru 4 Milk Producers Magnolia Manor	APT - 116 MIHU SFD, SFA - 40 MIHU SFD, SFA - 6 MIHU	780 397 56	1,233
TOTAL					6,020



Development Monitoring System Report



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Projects with More Than 40 Units (12/31/18)



Source: Howard County DPZ, 2018.



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

In 2018 there were 1,521 housing units approved in 40 site development plans totaling 215 acres (Table 17). Elkrigde had 681 approved units followed by Downtown Columbia with 382 units, the Southeast with 275, all other Columbia with 98, and Ellicott City with 85.

Table 18 shows new units from approved site development plans by unit type. Of the 1,521 approved units, 16% were for single family detached units, 13% were for single family attached units and 72% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 18
Approved Units in SDP's by Unit Type in 2018

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	382	0	382	25%
All Other Columbia	98	0	0	0	98	6%
Elkrigde	29	8	644	0	681	45%
Ellicott City	55	30	0	0	85	6%
Rural West	0	0	0	0	0	0%
Southeast	55	156	64	0	275	18%
TOTAL	237	194	1,090	0	1,521	75%
PERCENT	16%	13%	72%	0%	100%	

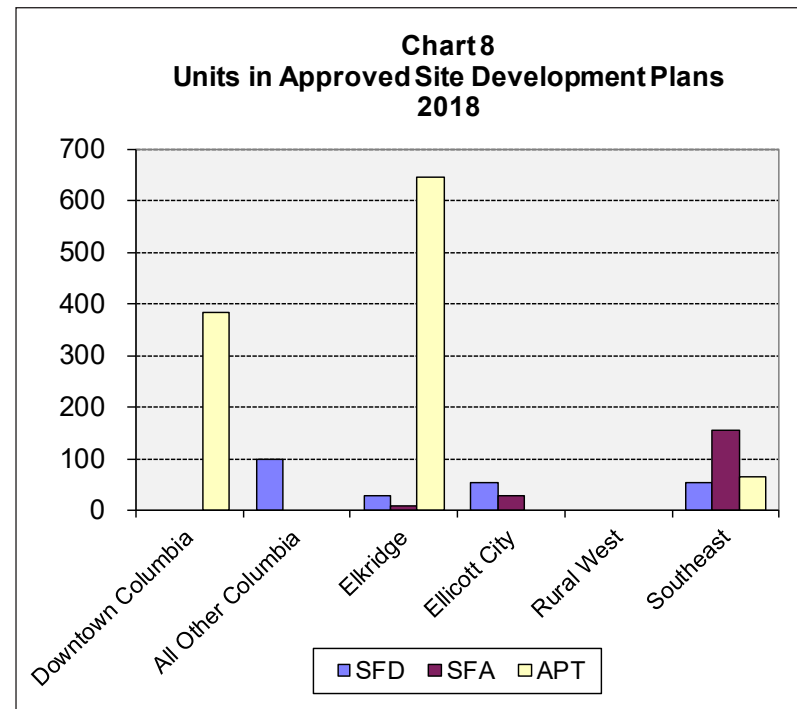


Table 17
Approved Residential Site Development Plans in 2018

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	382	25%	1	3%	21	10%
All Other Columbia	98	6%	4	10%	112	52%
Elkrigde	681	45%	13	33%	35	16%
Ellicott City	85	6%	12	30%	17	8%
Rural West	0	0%	0	0%	0	0%
Southeast	275	18%	10	25%	31	14%
TOTAL	1,521	100%	40	100%	215	90%

Last Year's Projects - Greater than 20 Units

Of the total 1,521 units approved in site development plans last year, 1,392 or about 92% were in part of projects with 20 units or more. These larger projects, shown in Table 19, are located in four 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, 2014 to December 31, 2018. Over this five year period 7,390 units were approved countywide in 235 site development plans totaling 1,164 acres.

Table 19
Approved Residential SDP's, Projects With 20 Units or More in 2018

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-17-027	Crescent Neighborhood	APT - 24 MIHU	382	382
All Other Columbia	SDP-18-032	Enclave at River Hill - Phase 2	SFD	62	92
	SDP-18-040	Enclave at River Hill - Phase 3	SFD	30	
Elkridge	SDP-18-029	The Wexley at 100	APT - 40 MIHU	394	644
	SDP-18-002	Corridor Square	APT - 38 MIHU	250	
Ellicott City	SDP-18-017	Waverly Grove	SFA	30	30
Southeast	SDP-15-043	Laurel Park Station - Phase 1	SFA, APT - 34 MIHU	220	244
	SDP-18-003	Honeysuckle Ridge	SFD - 3 MIHU	24	
TOTAL					1,392

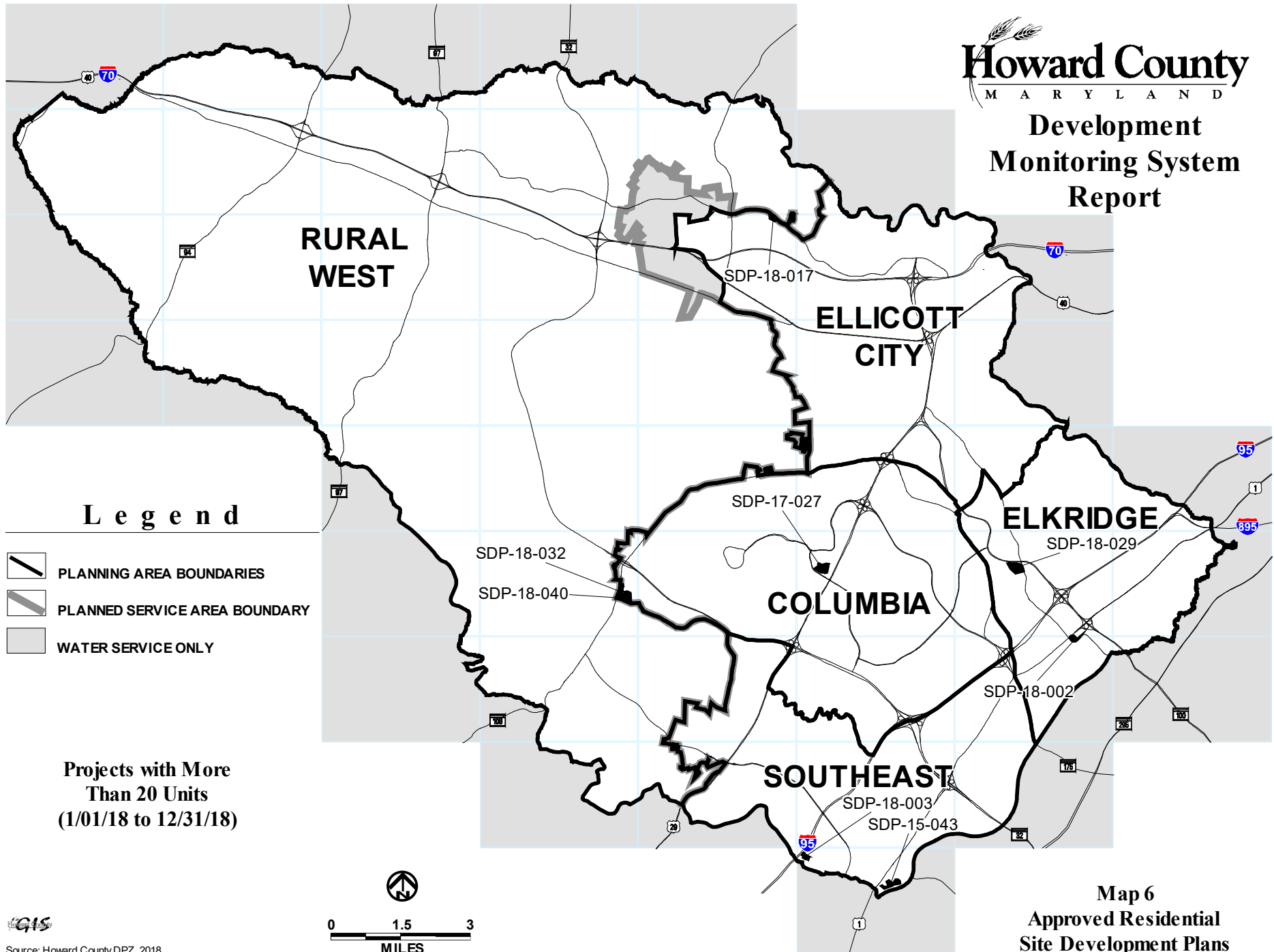
Table 20
Approved Units in Residential Site Development Plans, 2014 to 2018

Year	SFD	SFA	APT	MH	Total
2014	432	621	830	0	1,883
2015	402	444	806	0	1,652
2016	255	413	318	0	986
2017	371	322	655	0	1,348
2018	237	194	1,090	0	1,521
TOTAL	1,697	1,994	3,699	0	7,390
PERCENT	23%	27%	50%	0%	100%
ANNUAL AVG.	339	399	740	0	1,478




Table 21
Approved Residential Site Development Plans, 2014 to 2018

Year	Units	Plans	Acreage
2014	1,883	71	278
2015	1,652	46	207
2016	986	39	232
2017	1,348	39	232
2018	1,521	40	215
TOTAL	7,390	235	1,164
ANNUAL AVG.	1,478	47	233

**Development
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Report**



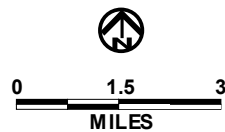
Legend

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

**Projects with More
Than 20 Units
(1/01/18 to 12/31/18)**



Source: Howard County DPZ, 2018.



**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, 2018, are tabulated and compared to those in process a year earlier (as of December 31, 2017). SDPs are generally not required for large lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Number of Plans

There were one more residential site development plans in process as of December 31, 2018, compared to the prior reporting period in 2017, 33 plans in 2018 compared to 32 plans in 2017 (Table 22).

Table 22
Number of Residential SDP's In Process, 12/31/18 & 12/31/17

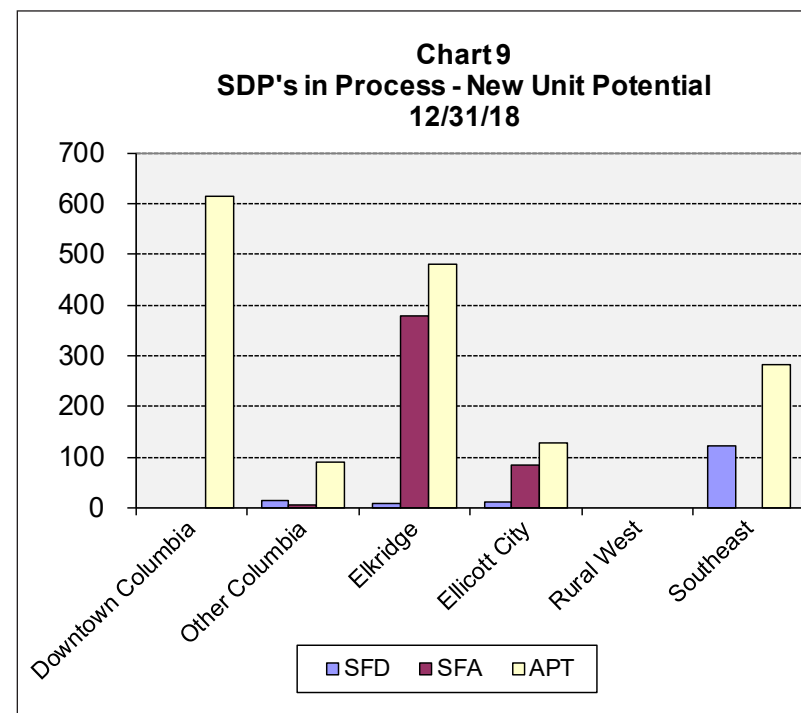
Planning Area	2018	2017
Downtown Columbia	2	3
All Other Columbia	4	2
Elkridge	11	11
Ellicott City	9	6
Rural West	1	0
Southeast	6	10
TOTAL	33	32

Number of Potential Units

There were 349 less units in process as of December 31, 2018, compared to December 31 of the previous year, 2,220 units compared to 2,569 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 1,596 proposed units in 2018. This is followed by 468 proposed single family attached or townhouse units and 156 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, 12/31/18
(With comparisons to Countywide total as of 12/31/17)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	615	0	615
All Other Columbia	14	5	90	0	109
Elkridge	9	379	480	0	868
Ellicott City	12	84	127	0	223
Rural West	0	0	0	0	0
Southeast	121	0	284	0	405
TOTAL	156	468	1,596	0	2,220
As of 12/31/17	163	423	1,983	0	2,569



Number of Acres

As of December 31, 2018, a total of 169 acres of residential land were in the site development plan process. This is about the same as the previous year when there were 164 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects with more than 30 units. Map 7 shows the location of these projects. Of the 2,220 units in the site development plan process, 2,151 or about 97% were in projects with more than 30 units.

These large projects include two SDPs in the Crescent Neighborhood in Downtown Columbia; Brightview Columbia in Columbia, Oxford Square, Blue Stream, Trotter’s Knoll, and River Watch 2 in Elkridge; Dorsey Overlook and Long Gate Overlook in Ellicott City; and Laurel Park Station and Maple Lawn South in the Southeast.

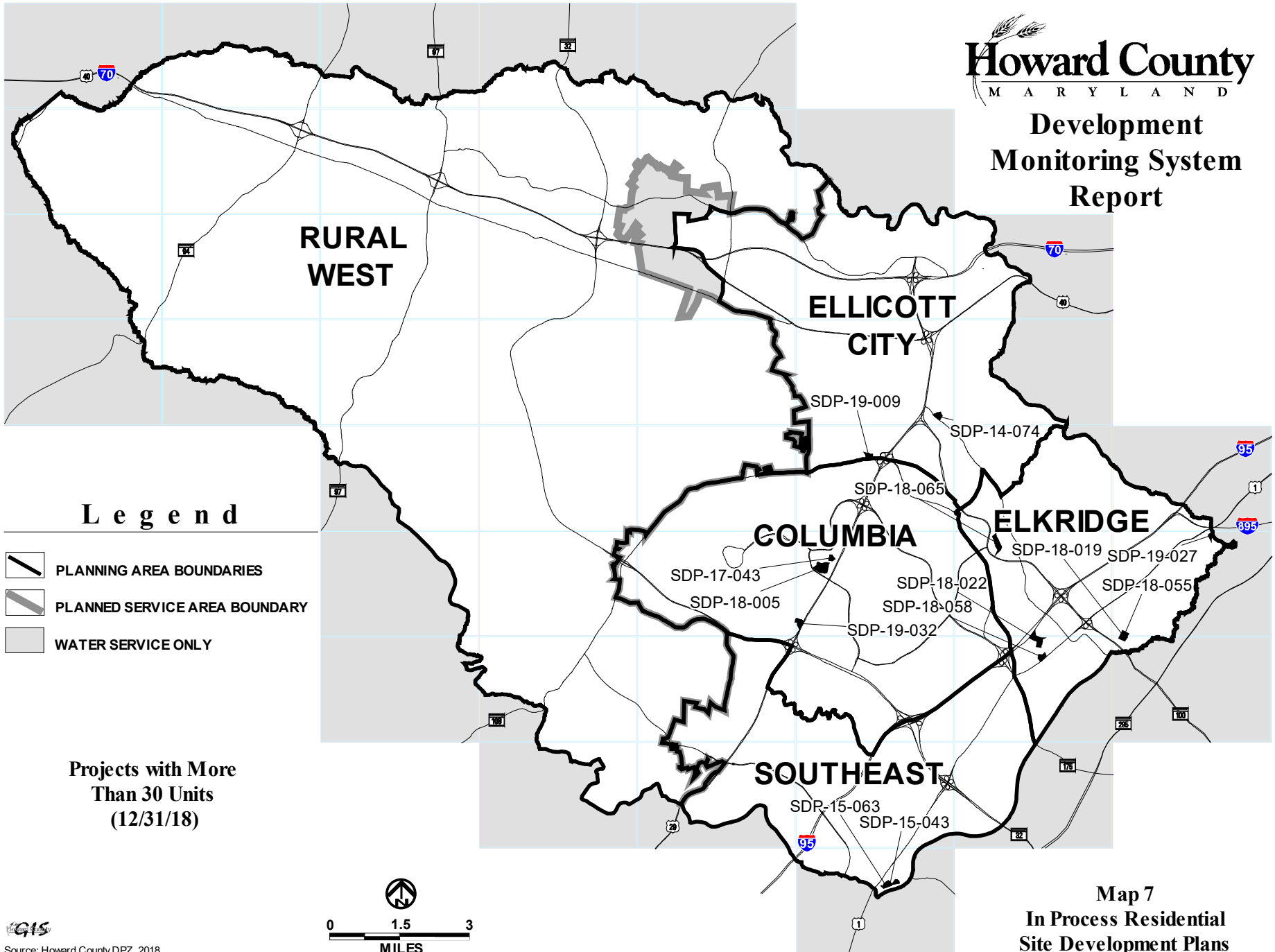
Table 24
Acreeage of Residential SDP's In Process, 12/31/18 & 12/31/17

Planning Area	2018	2017
Downtown Columbia	24	45
All Other Columbia	13	21
Elkridge	60	47
Ellicott City	19	15
Rural West	25	0
Southeast	28	37
TOTAL	169	164

Table 25
In Process Residential Site Development Plans, Projects With More Than 30 Units, 12/31/18

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-18-005	Crescent Neighborhood	APT - 26 MIHU	423	615
	SDP-17-043	Crescent Arts Center	APT - 96 MIHU	192	
Remaining Columbia	SDP-19-032	Brightview Columbia	Age-Restricted APT - 9 MIHU	90	90
Elkridge	SDP-18-055	Oxford Square - Bristol Court	APT - 49 MIHU	322	848
	SDP-18-022	Delacour at Blue Stream	SFA - 34 MIHU	180	
	SDP-18-058	Blue Stream 3	APT - 29 MIHU	156	
	SDP-18-065	Trotter's Knoll - Section 1	SFA - 8 MIHU	78	
	SDP-18-019	Oxford Square	SFA - 9 MIHU	56	
	SDP-19-027	River Watch 2	SFA - 9 MIHU	56	
Ellicott City	SDP-19-009	Dorsey Overlook Apartments	APT - 20 MIHU	127	206
	SDP-14-074	Long Gate Overlook	SFA - 5 MIHU	79	
Southeast	SDP-15-063	Laurel Park Station	APT - 42 MIHU	280	392
	SDP-15-043	Maple Lawn South	SFD	112	
TOTAL					2,151

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Source: Howard County DPZ, 2018.

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, 2018, to December 31, 2018, the County issued 2,114 residential building permits for new construction (Table 26). Elkridge had the greatest number issued with 1,114, followed by Downtown Columbia with 382 and then Ellicott City with 280. Countywide, 21% of the permits were for single family detached units. About 61% were for apartment units (both rental and condo) and 17% for single family attached units. Chart 10 shows these results graphically by planning area.

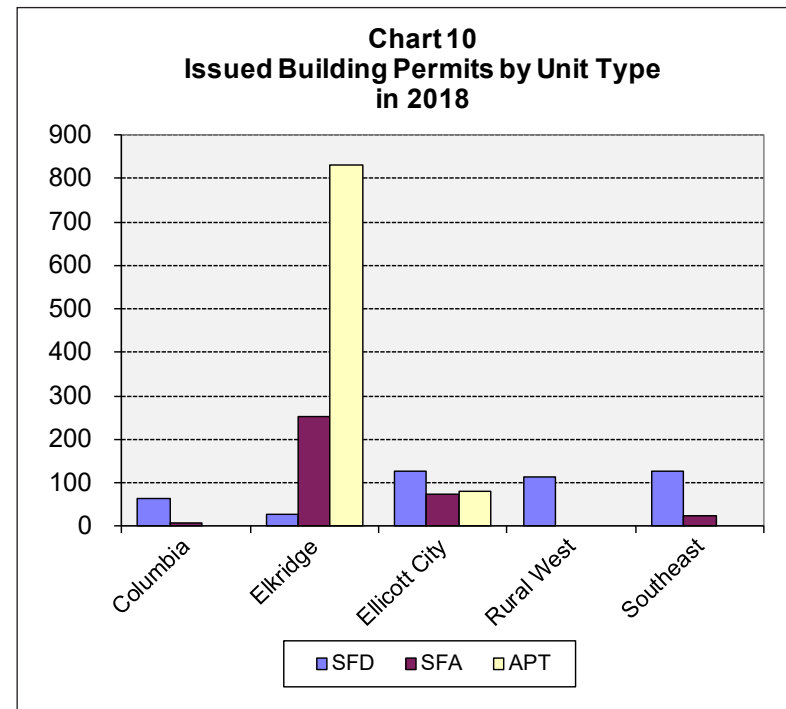


Table 26
Issued Residential Building Permits by Unit Type in 2018

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	382	0	382	18%
All Other Columbia	63	9	0	0	72	3%
Elkridge	29	254	831	0	1,114	53%
Ellicott City	127	73	80	0	280	13%
Rural West	114	0	0	0	114	5%
Southeast	128	24	0	0	152	7%
TOTAL	461	360	1,293	0	2,114	100%
PERCENT	22%	17%	61%	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 87%, or 1,831 of the total 2,114 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 2014 to 2018, a total of 8,847 residential permits have been issued in Howard County (Table 28). This is an average of 1,769 permits per year. Last year's 2,114 issued permits was 78% more than the 1,185 permits issued the year before and the highest since 2016.

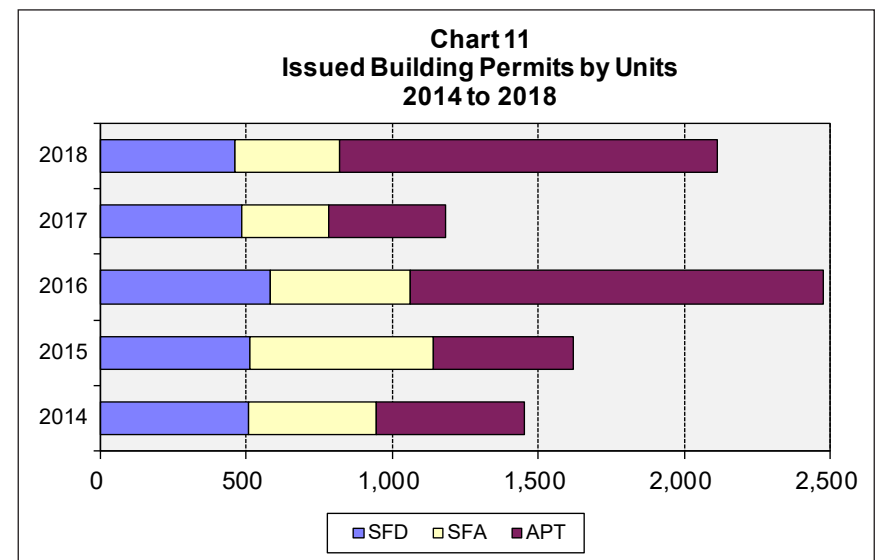
Of the 8,847 total permits issued over the 5 year time period, 2,553, or 29%, were for single family detached units. There were 2,196 permits (25%) for single family attached units and 4,098 permits (46%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

Table 27
Issued Residential Building Permits, Subdivisions With 25 or More Units in 2018

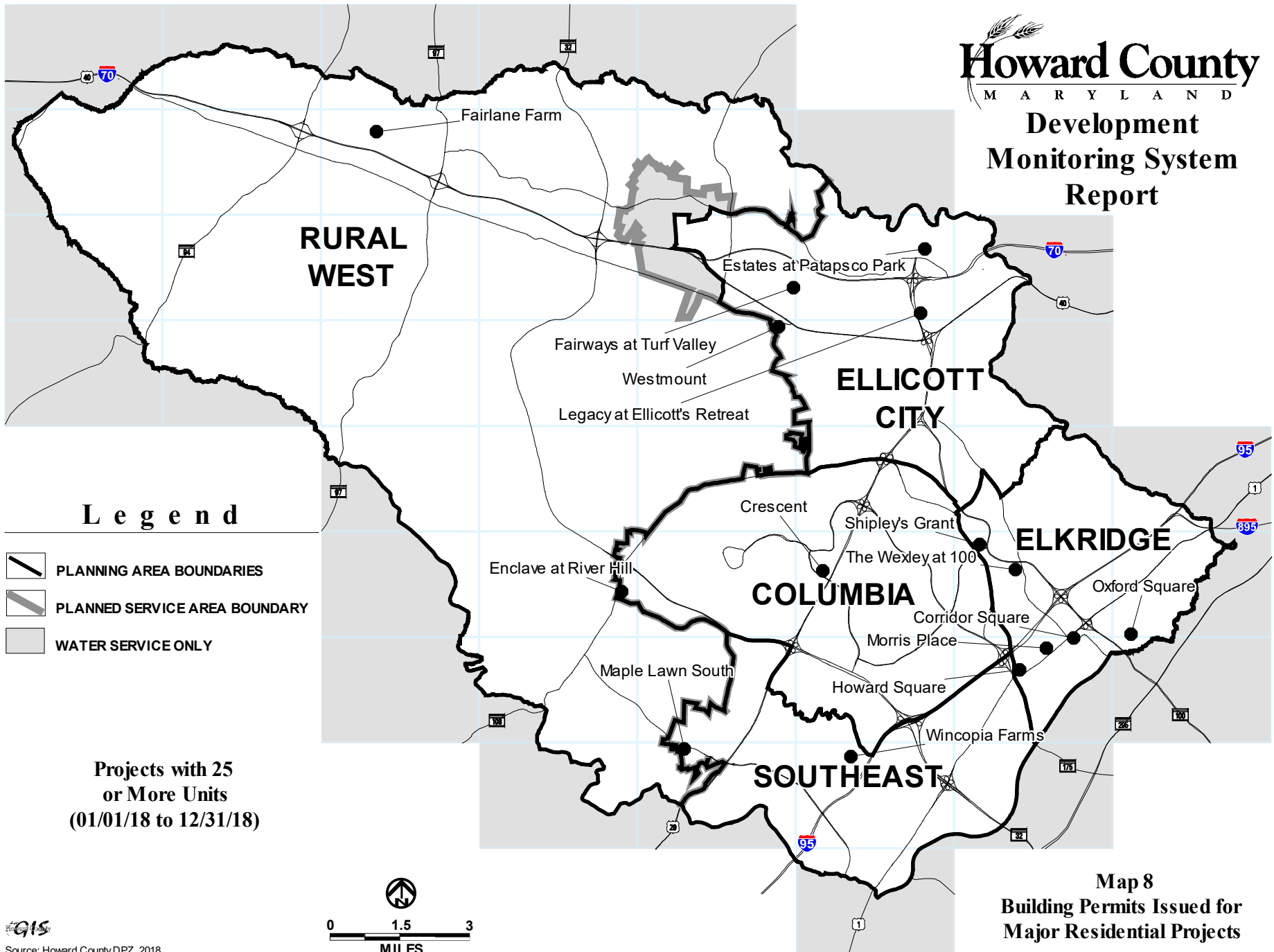
Planning Area	Subdivision	Unit Type	Units	TOTAL
Downtown Columbia	Crescent	Apartments	382	382
All Other Columbia	Enclave at River Hill	Single-Family Detached	50	50
Elkridge	Oxford Square	Townhomes/Apartments	382	1,085
	The Wexley at 100	Apartments	259	
	Corridor Square	Apartments	250	
	Shipley's Grant	Townhomes	70	
	Howard Square	Apartments	64	
	Morris Place	Townhomes	60	
Ellicott City	Legacy At Ellicott's Retreat	Apartments-Age Restricted	80	227
	Estates at Patapsco Park	Single-Family Detached	65	
	Fairways at Turf Valley	Townhomes	41	
	Westmount	Single-Family Detached	41	
Rural West	Fairlane Farm	Single-Family Detached	27	27
Southeast	Maple Lawn South	Single-Family Detached	30	60
	Wincopia Farms	Single-Family Detached	30	
TOTAL				1,831

Table 28
Issued Residential Building Permits by Unit Type, 2013 to 2107

Year	SFD	SFA	APT	MH	Total
2014	509	435	509	0	1,453
2015	514	628	478	0	1,620
2016	583	478	1,414	0	2,475
2017	486	295	404	0	1,185
2018	461	360	1,293	0	2,114
TOTAL	2,553	2,196	4,098	0	8,847
PERCENT	29%	25%	46%	0.0%	100%
ANNUAL AVG.	511	439	820	0	1,769



Howard County
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**Projects with 25
 or More Units
 (01/01/18 to 12/31/18)**



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

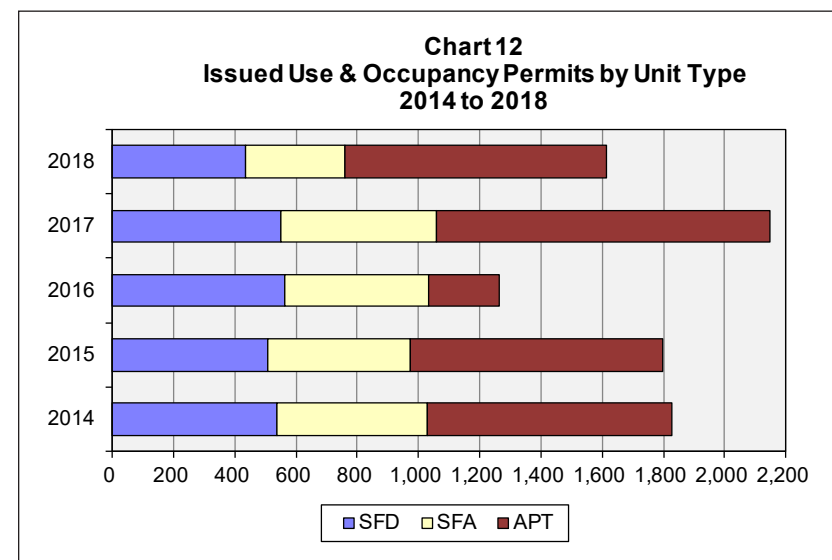
Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2018, to December 31, 2018, the County issued 1,612 use and occupancy permits (Table 29). Of all planning areas, the Southeast had the most with 457. This is followed by Downtown Columbia with 437, Ellicott City with 270, Elkridge with 248, the Rural West with 116, and Columbia with 84. Countywide, 27% of the permits were for single family detached units, 20% were for single family attached units and 53% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type in 2018

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	437	0	437	27%
All Other Columbia	61	23	0	0	84	5%
Elkridge	23	225	0	0	248	15%
Ellicott City	98	39	133	0	270	17%
Rural West	116	0	0	0	116	7%
Southeast	137	37	283	0	457	28%
TOTAL	435	324	853	0	1,612	73%
PERCENT	27%	20%	53%	0%	100%	



Five Year Results

From 2014 to 2018, a total of 8,649 use and occupancy permits were issued in Howard County (Table 30). This is an annual average of 1,730 permits per year.

Of the 8,649 total use and occupancy permits issued over the five year timeframe, 30% were for single family detached units, 26% for single family attached units, and 44% for apartment units (both rental and condo). There were 25% less units built last year compared to the year before, 1,612 completions in 2018 compared to 2,147 in 2017. Chart 12 shows the results by unit type graphically over time.

Table 30
Issued Use and Occupancy Permits by Unit Type, 2014 to 2018

Year	SFD	SFA	APT	MH	Total
2014	536	491	802	0	1,829
2015	506	469	823	0	1,798
2016	564	467	232	0	1,263
2017	550	510	1,087	0	2,147
2018	435	324	853	0	1,612
TOTAL	2,591	2,261	3,797	0	8,649
PERCENT	30%	26%	44%	0%	100%
ANNUAL AVG.	518	452	759	0	1,730

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 (R-SI) 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, 2018, to December 31, 2018, 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, 2018. This includes both subdivision and site development plans. During this latest time period there were 114 age-restricted units in process. These units are from two projects in the Columbia planning area, Brightview Columbia (90 apartment units) and Eden Brook (24 townhomes). Last year in 2017 there were no age-restricted apartment units in process.

Table 31
Age Restricted Units from Plans in Process, 12/31/2018
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	24	90	114	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	24	90	114	100%
PERCENT	0%	21%	79%	100%	
As of 12/31/17	0	0	0	0	

Table 32 shows the total MIHU units in process. These total 701, the greatest number of which are in Downtown Columbia. This is less than the number in process the previous year when there were 843 in process.

Table 32
MIHU Units from Plans in Process, 12/31/2018
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia *	0	0	275	275	39%
All Other Columbia	0	0	9	9	1%
Elkridge	0	65	101	166	24%
Ellicott City	0	42	47	89	13%
Rural West	0	0	0	0	0%
Southeast	0	46	116	162	23%
TOTAL	0	153	548	701	61%
PERCENT	0%	22%	78%	100%	
As of 12/31/17	0	169	674	843	

* Includes very low and middle income units and MIHU units in accordance to the DT Columbia Plan.

Table 33 shows just the age-restricted MIHU units in process. For this year, 9 of the 701 MIHU units are age-restricted. There were no 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, 12/31/2018
(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	9	9	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	0	9	9	100%
PERCENT	0%	0%	100%	100%	
As of 12/31/17	0	0	0	0	

Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2018, and December 31, 2018, with comparisons to the previous year. There were no units approved in 2018 and 12 approved in 2017.

Table 35 shows the MIHU units in approved site development plans. A total of 136 units were approved, all but 24 of them in Elkridge. None of these units are 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 2018
(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	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	
Year 2017	0	12	0	12	

Table 35
MIHU Units from Approved Plans in 2018
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	24	24	18%
All Other Columbia	0	0	0	0	0%
Elkridge	0	24	88	112	82%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	24	112	136	82%
PERCENT	0%	18%	82%	100%	
Year 2017	0	26	123	149	

Table 36
Age-Res. MIHU Units from Approved Plans in 2018
(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	0	0	0%
TOTAL	0	0	0	0	0%
PERCENT	0%	0%	0%	0%	
Year 2017	0	0	0	0	

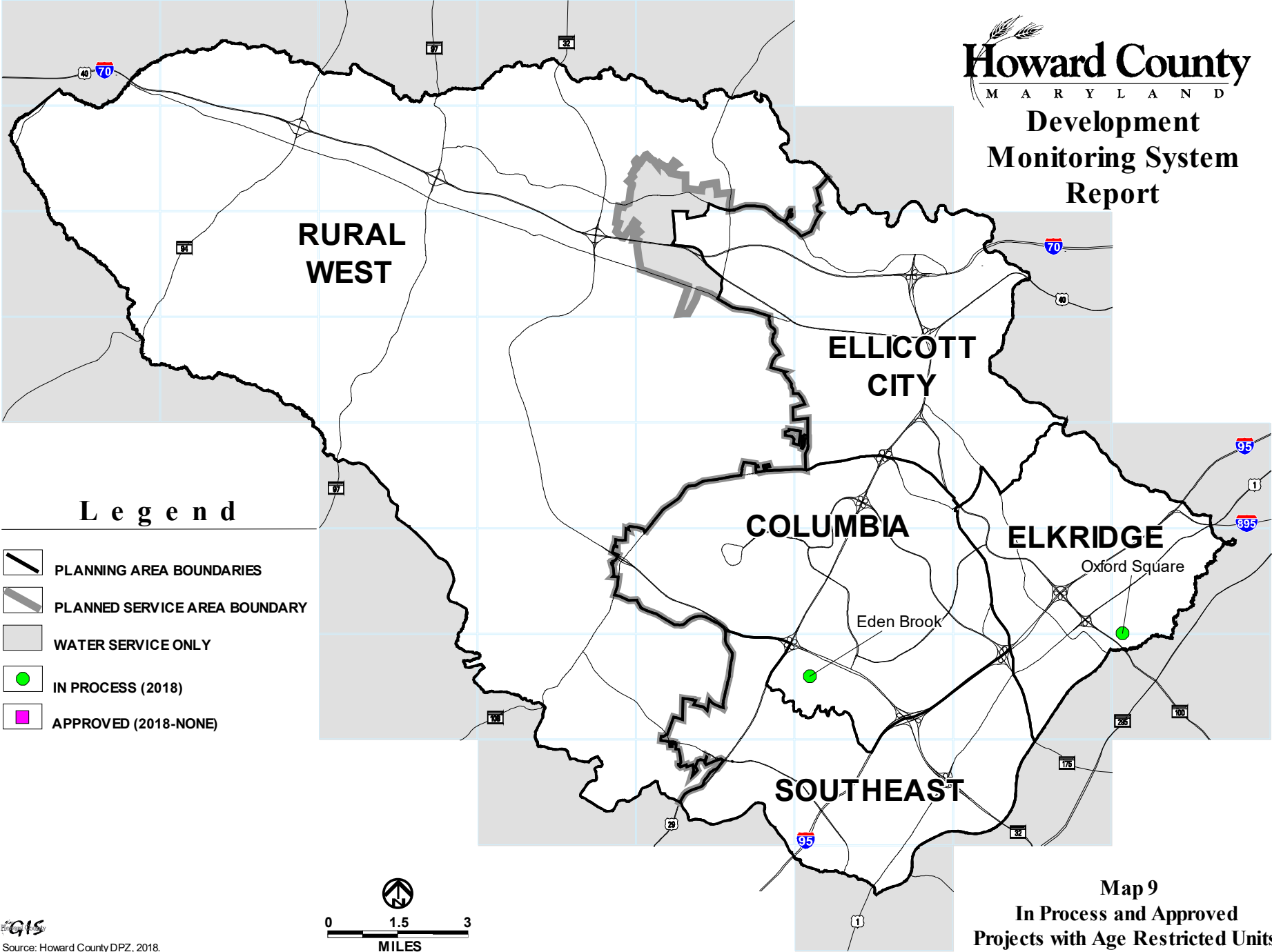
Table 37
In Process Plans With MIHU and Age Restricted Units On December 31, 2018

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				
The Crescent - DT Columbia - Remaining Units	FDP-DC-CRSNT-1A	NT	0	0	153	153	0	0	0	0	0	0	153	153	0	0	0	0
Arts Center - DT Columbia	SDP-17-043	NT	0	0	96	96	0	0	0	0	0	0	96	96	0	0	0	0
Laurel Park Station - Remaining Units	S-18-001	TOD	0	0	74	74	0	0	0	0	0	0	74	74	0	0	0	0
Oxford Square - Bristol Court	SDP-18-055	TOD	0	0	49	49	0	0	0	0	0	0	49	49	0	0	0	0
Laurel Park Station	SDP-15-063	TOD	0	0	42	42	0	0	0	0	0	0	42	42	0	0	0	0
Milk Producers	S-18-003	R-SC, R-SC	0	40	0	40	0	0	0	0	0	40	0	40	0	0	0	0
Delacour at Blue Stream	SDP-18-022	CAC	0	34	0	34	0	0	0	0	0	34	0	34	0	0	0	0
Blue Stream 3 - Apts/Commercial	SDP-18-058	CAC	0	0	29	29	0	0	0	0	0	0	29	29	0	0	0	0
The Crescent - DT Columbia	SDP-18-005	NT	0	0	26	26	0	0	0	0	0	0	26	26	0	0	0	0
Taylor Highlands Phase 1	SP-16-013	R-A-15	0	0	26	26	0	0	0	0	0	0	26	26	0	0	0	0
Dorsey Center - Parcel R	S-17-004	TOD	0	0	23	23	0	0	0	0	0	0	23	23	0	0	0	0
Chapelgate	S-19-001	CEF	0	14	0	14	0	0	0	0	0	14	0	14	0	0	0	0
Dorsey Overlook	S-16-004	R-APT	0	13	0	13	0	0	0	0	0	13	0	13	0	0	0	0
Oxford Square	SDP-18-019	TOD	0	9	0	9	0	0	0	0	0	9	0	9	0	0	0	0
Brightview Columbia	F-19-037	CEF	0	0	0	0	0	0	9	9	0	0	9	9	0	0	81	81
River Watch 2	SDP-19-027	CAC	0	9	0	9	0	0	0	0	0	9	0	9	0	0	0	0
Trotter's Knoll, Section 1	SDP-18-068	R-SA-8	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Dorsey's Ridge	S-17-006	CEF	0	5	1	6	0	0	0	0	0	5	1	6	0	0	0	0
Magnolia Manor	P-17-004	R-SC	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0
Long Gate Overlook	SDP-14-074	R-A-15	0	5	0	5	0	0	0	0	0	5	0	5	0	0	0	0
Terrapin Woods (Tiber Woods)	F-18-001	R-SC	0	4	0	4	0	0	0	0	0	4	0	4	0	0	0	0
Potter's Place	S-18-008	R-A-15	0	3	0	3	0	0	0	0	0	3	0	3	0	0	0	0
Trotter's Knoll, Section 2	F-18-107	R-SA-8	0	2	0	2	0	0	0	0	0	2	0	2	0	0	0	0
The Towns at Court Hill	S-17-007	R-A-15	0	1	0	1	0	0	0	0	0	1	0	1	0	0	0	0
Dorsey Overlook Apartments	SDP-19-009	R-APT	0	0	20	20	0	0	0	0	0	0	20	20	0	0	0	0
Eden Brook	SP-18-003	R-12	0	0	0	0	0	0	0	0	0	0	0	0	24	0	0	24
TOTAL			0	153	539	692	0	0	9	9	0	153	548	701	0	24	81	105

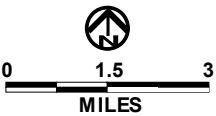
Table 38
Approved Subdivisions & SDP's with MIHU and Age Restricted Units in 2018

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				
The Crescent - DT Columbia	SDP-17-027	NT	0	0	24	24	0	0	0	0	0	0	24	24	0	0	0	0
Corridor Square Parcel C	SDP-18-002	TOD	0	0	38	38	0	0	0	0	0	0	38	38	0	0	0	0
The Wexley at 100 (The Park at Locust Thicket)	SDP-18-029	R-A-15, POR	0	0	40	40	0	0	0	0	0	0	40	40	0	0	0	0
Laurel Park Station	SDP-15-043	TOD	0	24	10	34	0	0	0	0	0	24	10	34	0	0	0	0
TOTAL			0	24	112	136	0	0	0	0	0	24	112	136	0	0	0	0

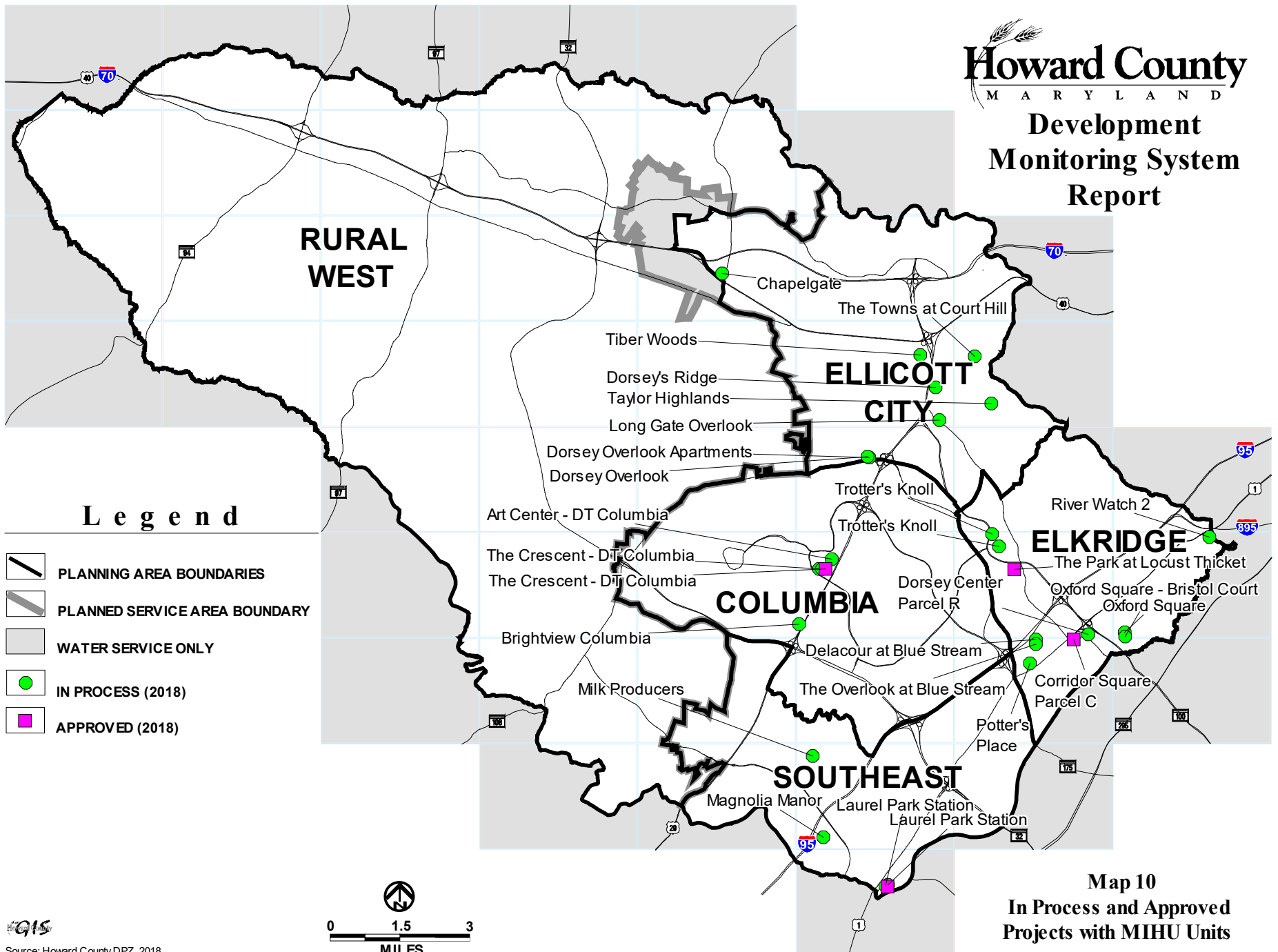
Howard County M A R Y L A N D Development Monitoring System Report



GIS
Source: Howard County DPZ, 2018.

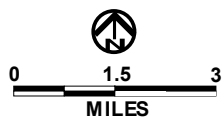


**Development
Monitoring System
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Legend

- PLANNING AREA BOUNDARIES
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY
- IN PROCESS (2018)
- APPROVED (2018)



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

GIS
Source: Howard County DPZ, 2018.

Use & Occupancy Permits

Table 39 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2018, and December 31, 2018, 83 age-restricted units were built, 5% of the total 1,612 housing units built in the County over this latest reporting period.

There were 41 less age-restricted units built in the current reporting period compared to the previous period when there were 124 units built. The 2018 annual amount of 83 units built is the smallest number built since 2004, the time when legislation was adopted enabling increased opportunities to build age-restricted units.

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, 17% 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 2018
(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	48	48	58%
Rural West	0	0	0	0	0%
Southeast	0	35	0	35	42%
TOTAL	0	35	48	83	100%
PERCENT	0%	42%	58%	100%	

Year 2017	SFD	SFA	APT	TOTAL
	29	47	48	124

Table 40
Age Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/18

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%
01/15 to 12/15	48	72	48	168	1,798	9%
01/16 to 12/16	89	64	181	334	1,263	26%
01/17 to 12/17	29	47	48	124	2,147	6%
01/18 to 12/18	0	35	48	83	1,612	5%
TOTAL	358	1,302	2,058	3,718	21,951	17%
PERCENT	10%	35%	55%	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 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 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 scoring farms in 2009 and 2010. 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 the most recent application cycle, which began in March 2013. The law was amended to eliminate the batching process, and 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. For this current application cycle, over 50 property owners have requested scoring for their farms. From 2013 through 2017, there were 17 settlements totaling 1,094 acres added to the ALPP. In addition, an easement on a 71 acre property was acquired by MALPF in 2015, the first time in many years a new MALPF easement had been acquired. In 2018, the current DMS reporting period, there were no new acquisitions to either the ALPP or the MALPF. However, a property owner applied to MALPF in 2018, with acquisition likely to occur in 2019. An additional two properties are currently being evaluated for the county's ALPP with the potential for acquisition in 2019.

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 2018 reporting period, no properties were preserved with an agricultural easement through the development process.

As of December 31, 2018, there were 22,799 acres of permanently preserved agricultural land. This includes 15,719 acres of purchased easements through the County's program, 4,017 acres of easements purchased by the MALPF (plus an additional 81 acres in the Rural Legacy program), and 2,982 preservation acres dedicated as part of the land development process (Table 41).

Table 41
Agricultural Preservation Easements, December 31, 2018

Type	Acres	Percent
County Purchased Agric. Easements (1)	15,719	69%
State Purchased Agric. Easements	4,098	18%
Dedicated Agric. Preservation Parcels	2,982	13%
TOTAL	22,799	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 2018 is 2,982.

Besides agricultural easements, parcels can also be preserved through the development process as environmental preservation parcels. Over the current reporting period, 197 acres of land in 13 parcels were dedicated as Howard County/Homeowner’s Association preservation parcels. Table 42 shows the land preservation totals from dedicated easements through then end of 2018 for all easement types.

Since 1992, preservation easements on 12,060 acres have been created by cluster development and the Density/Cluster Exchange Options. The majority of the total dedicated preservation easements, 7,097 acres, are jointly held by Howard County and various homeowner’s associations. As indicated earlier, 2,982 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 16,685 acres have been subdivided using these zoning options in the Rural West. About 28% of this total, or 4,625 acres, is used for the development of residential lots and road right of ways. The remaining 72%, or 12,060 acres, is land in dedicated preservation easements. Of the 4,625 acres subdivided for

residential development, about 380 acres are not yet developed (built on), 3,789 acres are developed (built on) and 456 acres are for roads.

Table 42
Rural Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	230	289	
Undeveloped Lots (From Density Transfer)	80	91	
Total Undeveloped Lots	310	380	
Developed Lots (By Right)	2,320	2,566	
Developed Lots (From Density Transfer)	1,160	1,223	
Total Developed Lots	3,480	3,789	
Roadway		456	
TOTAL	3,790	4,625	27.7%

Preservation	Parcels	Acres	
Agricultural Preservation	88	2,982	
Howard County/Homeowner's Association	650	7,097	
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	878	12,060	72.3%

GRAND TOTAL (Includes Res. Develop.)	4,668	16,685	100.0%
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Total Preserved Land in the Rural West

Preservation easements in the Rural West discussed above total 31,840 acres. This includes 22,762 acres of agricultural preservation easements and 9,078 acres of environmental preservation parcels dedicated through the subdivision process. This accounts for about 34% of the approximate 94,660 total acres of land in the Rural West.

Including County and State parks (8,124 acres), WSSC land (2,438 acres), permanent historic easements (103 acres) and other environmental easements (1,221 acres) the total preserved land amounts to 43,726 acres, about 46% of all land in the Rural West.

Map 11 shows the preserved land as of December 31, 2018, including acquired (purchased) agricultural easements, dedicated agricultural and environmental preserved parcels, other environmental easements, as well as WSSC, County and State park land.

Neighborhood Preservation in the East

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

For the current reporting period covering calendar year 2018 there were two receiving subdivisions utilizing this option thereby acquiring additional development rights. These subdivisions received the transferred density from an already existing sending parcel on Belmont Manor that had additional density available to send. Table 43 shows the aggregate results since the beginning of this program. A total of 13 neighborhood preservation parcels have been created totaling 73.1 acres. The easement holder for 12 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 19 additional single family detached homes, 6 additional townhomes and 104 additional apartment units on a total of 7.8 acres. These additional units are part of receiving subdivisions that total 1,324 housing units on 370 acres. Thus far through the end of 2018, 831 of these 1,324 units are built. It should be noted that close to 198 of the 335 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, 222 acres in other land trust conservation easements (of these, 110 acres were newly acquired in 2018 by the Howard County Conservancy), and 37 acres in a county purchased agricultural preservation easement. Total preservation easements in the east therefore amount to 803 acres. This is summarized in Table 44.

Total Preserved Land in the East

Including County and State parks (10,471 acres), WSSC land (680 acres), non-County Open space such as HOA land (3,016) and Columbia Association open space (3,650 acres) the total preserved land amounts to 18,620 acres, about 28% of all land in the east. Map 11 shows the locations of the preserved land by the various types.

Table 43
Neighborhood Preservation, December 31, 2018

Receiving Parcels	Unit Type				Acres
	SFD	SFA	APT	Total	
Unbuilt Units (By Right)	97	0	359	456	34.9
Unbuilt Units (From Density Transfer)	2	0	35	37	2.0
Total Undeveloped Lots	99	0	394	493	36.9
Built Units (By Right)	425	60	254	739	95.9
Built Units (From Density Transfer)	17	6	69	92	5.8
Total Built Units	442	66	323	831	101.7
Open Space					197.7
Commercial					3.6
Institutional					0.9
Roadway					29.6
Total	541	66	717	1,324	370.4 83.5%

East Preserved Land - Sending Parcels	Preservation	Acres
Easement Holder	Parcels	
Howard County Government	12	69.8
Maryland Environmental Trust	0	0.0
Maryland Historical Trust	0	0.0
Taylor Properties Community Association	1	3.3
Total Preservation	13	73.1 16.5%
GRAND TOTAL		443.5 100.0%

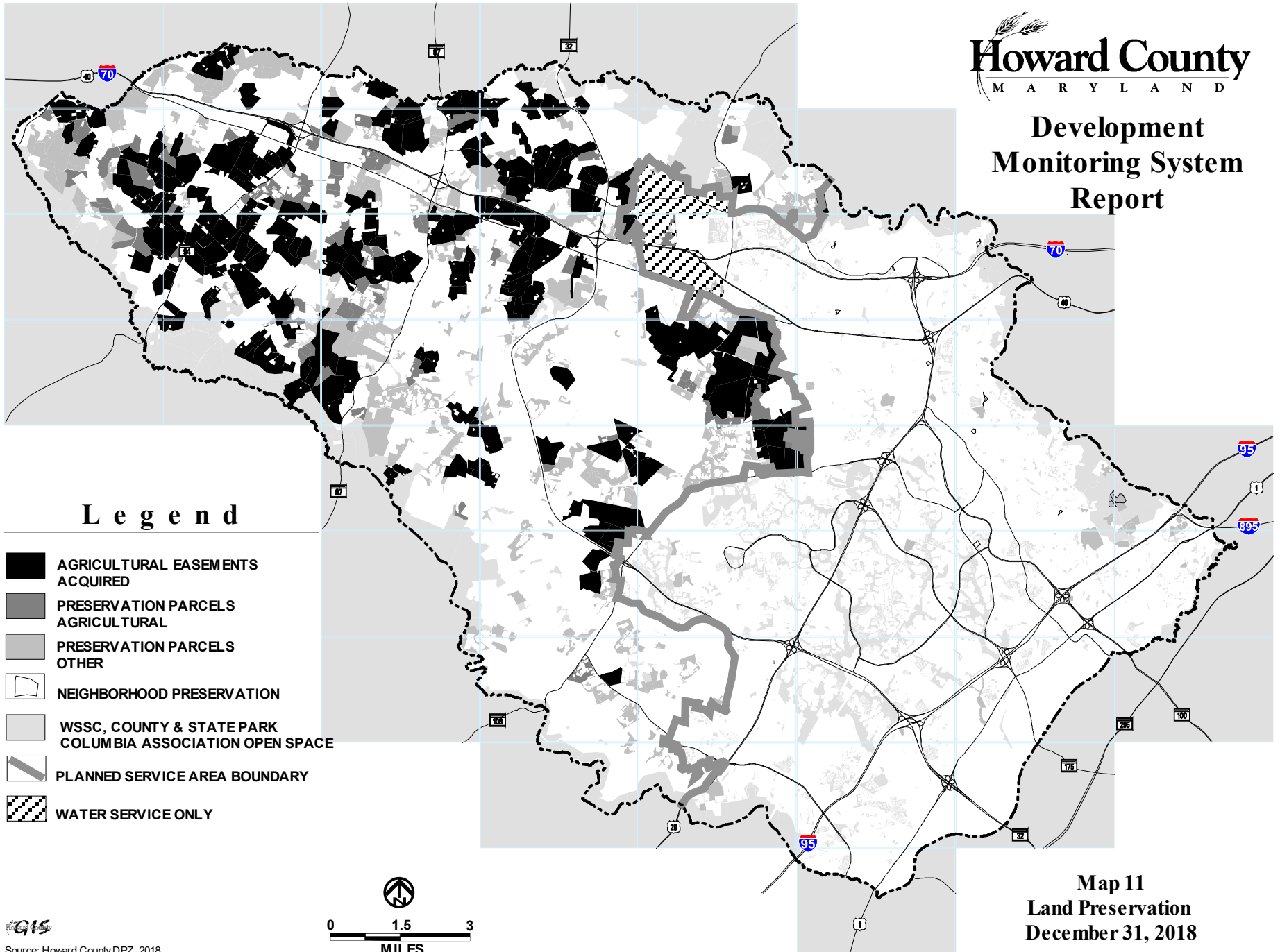
Table 44
East Preservation Easements, December 31, 2018

Type	Acres	Percent
Neighborhood Preservation	73	100%
Permanent Historic Easements	194	25%
Maryland Environmental Trust Easements	316	41%
Land Trust Conservation Easements	222	29%
Agricultural Easement (County Purchased)	37	5%
Total Other Easements	769	100%
TOTAL EAST PRESERVATION (1)	803	








(1) Total excludes double count of 39 acres on the Belmont property that has both a neighborhood preservation and a permanent historic easement on it.

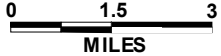


Development Monitoring System Report



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



Source: Howard County DPZ, 2018.

Map 11
Land Preservation
December 31, 2018

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 21 non-residential subdivision plans were recorded totaling 322 acres (Table 45). It should be noted that many of these are resubdivisions that do not create new lots, but simply create new easements. Also, some are parcel consolidations where the net number of lots actually get reduced.

Table 45
Recorded Non-Residential Subdivisions in 2018

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	37	60%	5	24%	49	15%
All Other Columbia	3	5%	3	14%	10	3%
Elkridge	6	10%	5	24%	67	21%
Ellicott City	2	3%	2	10%	5	1%
Rural West	0	0%	0	0%	0	0%
Southeast	14	23%	6	29%	191	59%
TOTAL	62	100%	21	100%	322	100%

Table 46 shows the recorded non-residential subdivisions from January 1, 2014 to December 31, 2018. Over this five year period there were 98 non-residential lots recorded countywide in 110 subdivision plans totaling 1,856 acres. This amounts to an annual average over the five year analysis time period of 20 lots in 22 plans encompassing 371 acres.

Table 46
Recorded Non-Residential Subdivisions, 2014 to 2018

Countywide	Lots	Plans	Acreage
2014	8	17	407
2015	12	18	231
2016	20	30	548
2017	(4)	24	348
2018	62	21	322
TOTAL	98	110	1,856
ANNUAL AVG.	20	22	371

In-Process Plans

Countywide, there were 26 non-residential subdivision plans in process as of December 31, 2018. This compares to 37 plans in process for the previous reporting period (Table 47). Eight plans were in Elkrige, 7 plans each in Columbia and the Southeast, 2 plans in the Rural West, and 1 plan each in Downtown Columbia and Ellicott City. 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, 2018, there were 3 lots in process, compared to 48 in process on December 31, 2017. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There were a total of 205 non-residential acres in the subdivision process as of December 31, 2018 (Table 49). This compares to 661 acres in process one year earlier. For the current year the greatest acreage amount is in the Southeast (109 acres). This is followed by the Rural West with 35 acres, 34 acres in Columbia, 24 acres in Elkrige, 3 acres in Downtown Columbia and no acres in Ellicott City.

Table 47
Number of Non-Residential Plans in Process, 12/31/18
with Comparisons to 12/31/2017 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	0	0	1	1
All Other Columbia	5	0	0	0	2	7
Elkrige	5	0	0	0	3	8
Ellicott City	1	0	0	0	0	1
Rural West	0	0	0	0	2	2
Southeast	5	1	0	0	1	7
TOTAL	16	1	0	0	9	26
12/31/17 Total	17	3	2	0	15	37

Table 48
Non-Residential Lots from Subdivision Plans in Process, 12/31/2018
with Comparisons to 12/31/2017 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	0	2	2
Elkrige	0	0	0	0	0
Ellicott City	0	0	0	0	0
Rural West	0	0	0	1	1
Southeast	0	0	0	0	0
TOTAL	0	0	0	3	3
12/31/17 Total	13	10	0	25	48

Table 49
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2018
with Comparisons to 12/31/2017 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	3	3
All Other Columbia	0	0	0	34	34
Elkrige	0	0	0	24	24
Ellicott City	0	0	0	0	0
Rural West	0	0	0	35	35
Southeast	63	0	0	45	109
TOTAL	63	0	0	141	205
12/31/17 Total	315	51	0	295	661

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 slightly more than 1 million square feet were approved in 14 site development plans on 97 acres (Table 50). The greatest amount of square footage approved was in Downtown Columbia, followed by the Southeast, Elkridge, the Rural West, Ellicott City and the rest of Columbia.

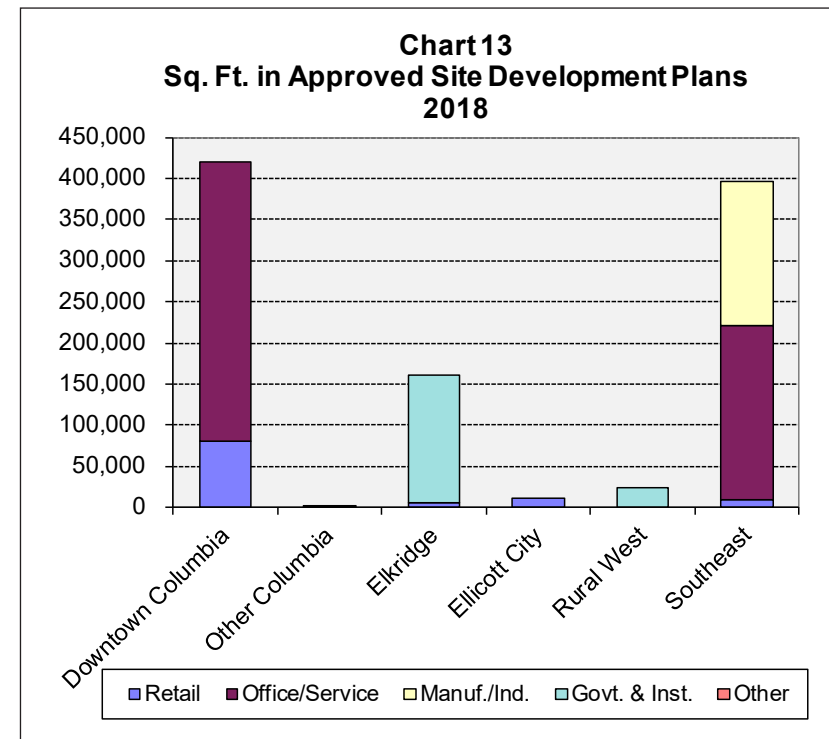
Table 51 shows the approved square footage by building type. About 549,000 square feet, 54% of the total, are for office/service uses, all of which are in Downtown Columbia and the Southeast. About 180,000 square feet, 18% of the total, are for government and institutional uses. Manufacturing/extensive industrial uses, all in the Southeast, total 175,000 square feet, 17% of the total. Retail uses account for the remaining 109,000 square feet, about 11% of the total. Chart 13 shows this graphically.

Table 51
Building Square Feet in Approved Non-Residential Site Development Plans in 2018

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	80,327	338,930	0	0	0	419,257
All Other Columbia	2,268	0	0	0	0	2,268
Elkridge	5,166	0	0	155,109	0	160,275
Ellicott City	11,688	0	0	0	0	11,688
Rural West	0	0	0	24,414	0	24,414
Southeast	9,900	210,500	175,200	0	0	395,600
TOTAL	109,349	549,430	175,200	179,523	0	1,013,502
PERCENT	10.8%	54.2%	17.3%	17.7%	0.0%	100.0%

Table 50
Approved Non-Residential Site Development Plans in 2018

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	419,257	41%	1	7%	21	21%
All Other Columbia	2,268	0%	2	14%	2	2%
Elkridge	160,275	16%	2	14%	12	13%
Ellicott City	11,688	1%	1	7%	3	3%
Rural West	24,414	2%	2	14%	16	16%
Southeast	395,600	39%	6	43%	44	45%
TOTAL	1,013,502	59%	14	100%	97	79%



Last Year’s Projects - Greater than 20,000 Square Feet

Of the slightly more than 1 million square feet of non-residential building space approved in site development plans last year, most all were in plans with more than 20,000 square feet. These larger plans are shown in Table 52. The locations of these plans are shown on Map 12.

In Downtown Columbia, a new building in the Crescent Neighborhood was approved totaling 419,000 square feet of mostly office space, with some retail included. (Please refer to the recently published Downtown Columbia Monitoring Report for further details on new and planned development in Downtown.) There was one larger plan in Elkridge for a new 155,000 square foot behavior health facility. In the Rural West, a new

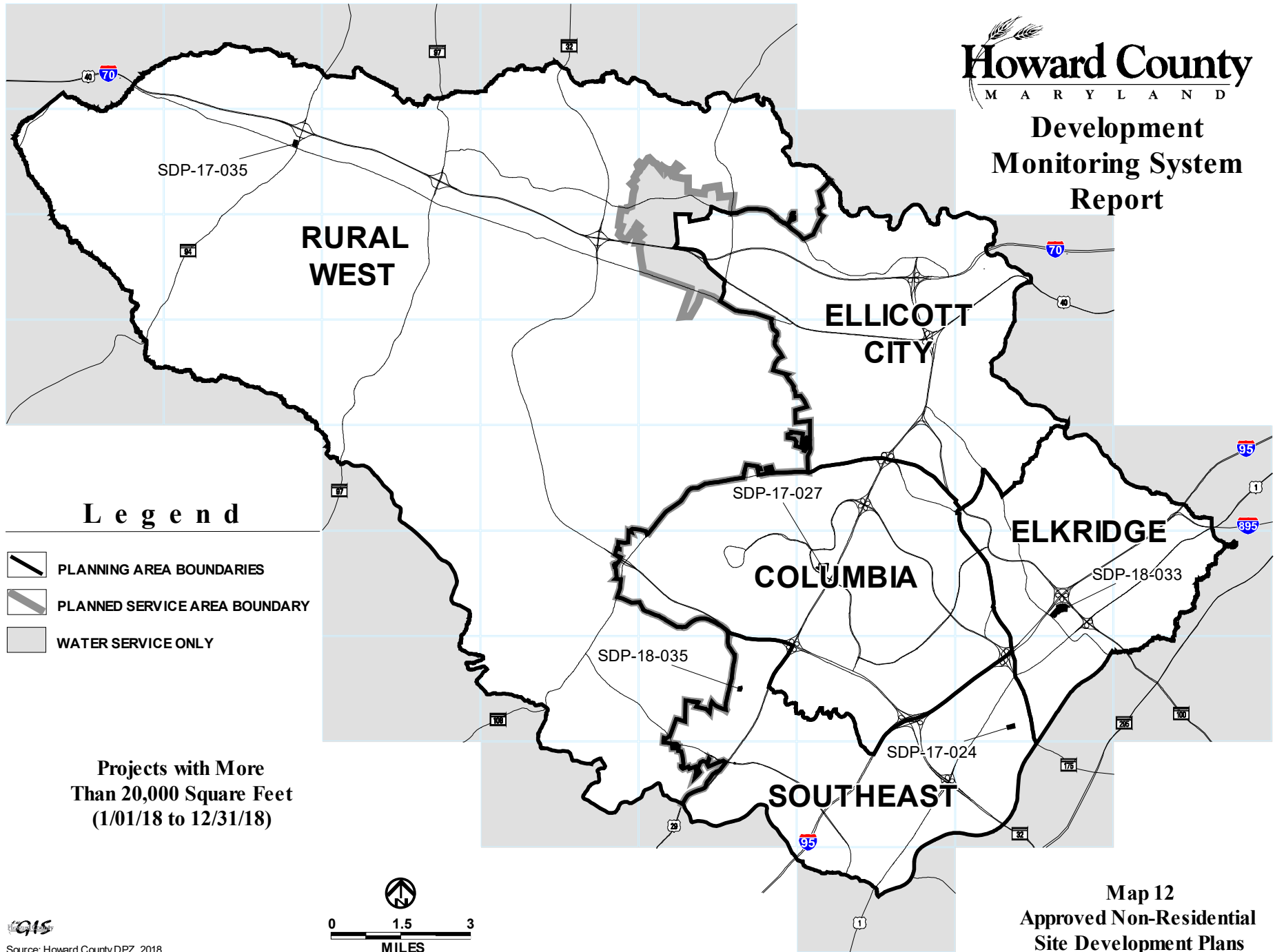
24,000 square foot Lisbon fire station was approved. Two larger plans were approved in the Southeast – a 175,000 square foot warehouse for the Maryland Wholesale Food Center and a new 210,500 square foot office and laboratory at the Johns Hopkins University Applied Physics Lab.

Table 52
Projects With More Than 20,000 Square Feet in Approved Non-Residential Site Development Plans in 2018

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-17-027	Crescent Neighborhood	Retail and Office	419,257	419,257
Elkridge	SDP-18-033	Behavior Health Facility	Hospital	155,109	155,109
Rural West	SDP-17-035	Lisbon Fire Station	Fire Station	24,414	24,414
Southeast	SDP-17-024	Maryland Wholesale Food Center	Warehouse	175,200	385,700
	SDP-18-035	Johns Hopkins University APL	Office-Laboratory	210,500	
TOTAL					984,480



Development Monitoring System Report



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- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Projects with More Than 20,000 Square Feet (1/01/18 to 12/31/18)



Source: Howard County DPZ, 2018.



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, 2014 to December 31, 2018. Over this timeframe there were 109 plans approved on 2,039 acres including close to 4.6 million square feet of building space. This equates to an annual average of about 916,000 square feet of new building space approved per year.

Last year, with about 1 million square feet of approved space, was more than the 980,000 square feet approved the year before. Chart 14 depicts these annual amounts.

Table 54 shows the five year history by building type. Over the five years, about 41% of the total 4.6 million square feet was for office/service space. About 30% was for manufacturing/extensive industrial space, 17% for government and institutional uses, 10% for retail uses and about 1% for other uses.

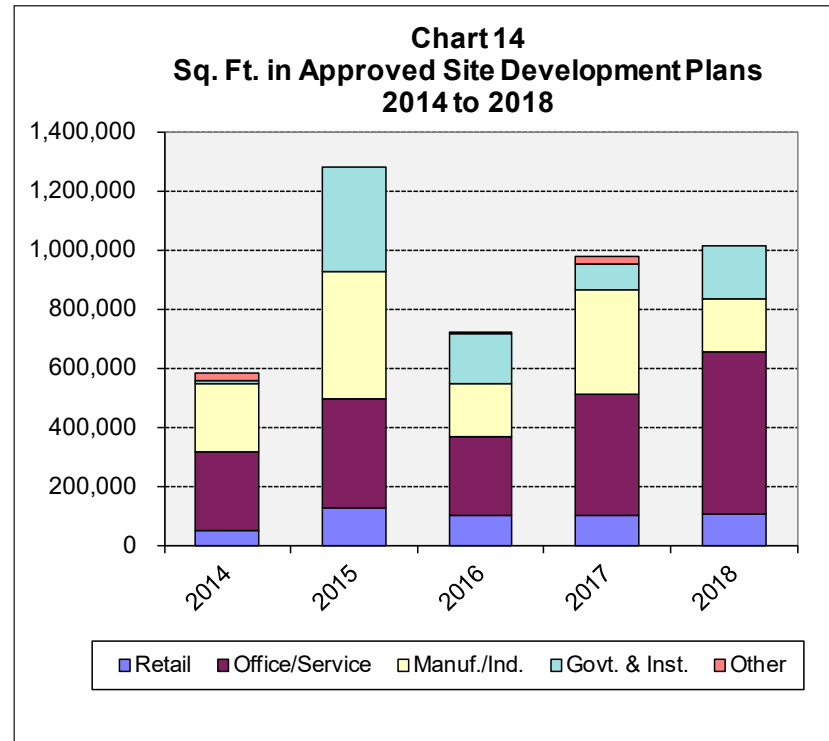


Table 53
Approved Non-Residential Site Development Plans
2014 to 2017

Year	Square Feet	Number or Plans	Acreage
2014	583,425	23	379
2015	1,281,525	23	405
2016	721,415	19	154
2017	980,165	30	1,004
2018	1,013,502	14	97
TOTAL	4,580,032	109	2,039
ANNUAL AVG.	916,006	22	408

Table 54
Building Square Feet in Approved Non-Residential Site Development Plans
2014 to 2018

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2014	50,646	265,305	233,866	11,664	21,944	583,425
2015	126,246	373,591	428,019	353,669	0	1,281,525
2016	102,933	264,346	183,026	167,110	4,000	721,415
2017	103,557	407,167	353,693	87,945	27,803	980,165
2018	109,349	549,430	175,200	179,523	0	1,013,502
TOTAL	492,731	1,859,839	1,373,804	799,911	53,747	4,580,032
PERCENT	10.8%	40.6%	30.0%	17.5%	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, 2018, 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, 2018. These plans include about 1.1 million square feet of building space covering 348 acres. This compares to 1.8 million square feet in 26 plans on 216 acres that were in process the previous year (on December 31, 2017).

As shown in Table 55, the Southeast had the most square footage in process, followed by Columbia and then Elkridge. Table 56 shows a more detailed breakdown of square footage by building type. About 551,000 square feet are for office/service uses, 187,000 square feet for manufacturing/extensive industrial uses, 177,000 square feet for retail uses, 125,000 square feet for other uses (a proposed art center in Downtown Columbia), and 54,000 square feet for government and institutional uses.

Projects Greater than 15,000 Square Feet

Table 57 shows site development plans with buildings greater than 15,000 square feet. Map 13 shows the locations of these projects. These projects account for about 94% of the total 1.1 million square feet in process.

Table 55
In-Process Non-Residential Site Development Plans, 12/31/18
with Comparisons to Countywide In-Process on 12/31/17

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	176,242	16%	3	9%	25	7%
All Other Columbia	311,375	28%	7	22%	130	37%
Elkridge	264,265	24%	8	25%	48	14%
Ellicott City	7,000	1%	2	6%	2	1%
Rural West	14,682	1%	6	19%	83	24%
Southeast	320,727	29%	6	19%	58	17%
TOTAL	1,094,291	100%	32	100%	348	100%
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12/31/2017	1,819,966		26		216	

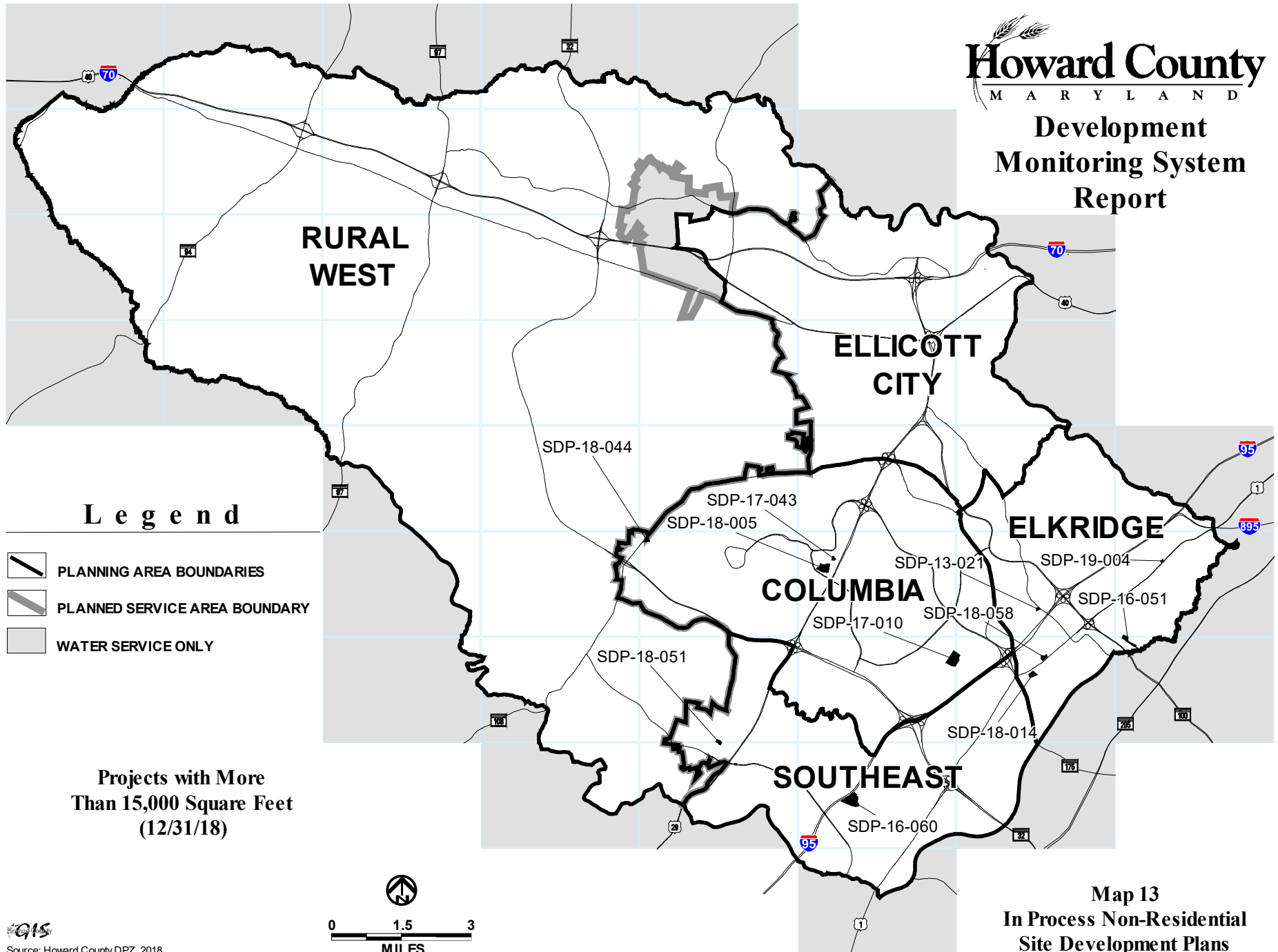
Table 56
Building Square Feet in In-Process Site Development Plans, 12/31/18
with Comparisons to Countywide In-Process on 12/31/17

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other	TOTAL
All Other Columbia	39,220	260,614	0	11,541	0	311,375
Elkridge	15,684	12,000	187,425	42,066	7,090	264,265
Ellicott City	7,000	0	0	0	0	7,000
Rural West	12,966	1,716	0	0	0	14,682
Southeast	41,473	276,564	0	0	2,690	320,727
TOTAL	176,893	550,894	187,425	53,607	125,472	1,094,291
PERCENT	16.2%	50.3%	17.1%	4.9%	11.5%	100.0%
<hr/>						
12/31/2017	215,429	998,721	251,000	231,269	123,547	1,819,966

Table 57
Projects With More Than 15,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/18

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-17-043	Crescent Neighborhood	Arts Center	115,692	176,242
	SDP-18-005	Crescent Neighborhood	Retail/Restaurant	60,550	
Columbia	SDP-17-010	7125 Columbia Gateway Drive	Office Building	254,000	294,293
	SDP-18-044	River Hill Square	Retail/Bank/Post Office	40,293	
Elkridge	SDP-19-004	Cubesmart Storage	Self-Storage Facility	111,625	255,291
	SDP-16-051	Oxford Square	Self-Storage Facility	75,800	
	SDP-18-058	Blue Stream	Retail/Office	25,800	
	SDP-18-014	Waterloo Fire Station	Fire Station	23,357	
	SDP-13-021	Mayfield Logistics Facility	Government Facility	18,709	
Southeast	SDP-16-060	Emerson Corporate Commons	Office Building	184,176	299,596
	SDP-18-051	Maple Lawn Farms	Office/Retail	115,420	
TOTAL					1,025,422

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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, 2018, to December 31, 2018, 61 permits were issued for about 1.3 million square feet in non-residential building space (Table 58). The greatest amount of square footage was in the Southeast, followed by Downtown Columbia, and then non-Downtown portion of Columbia.

Table 58
Issued Non-Residential Building Permits in 2018

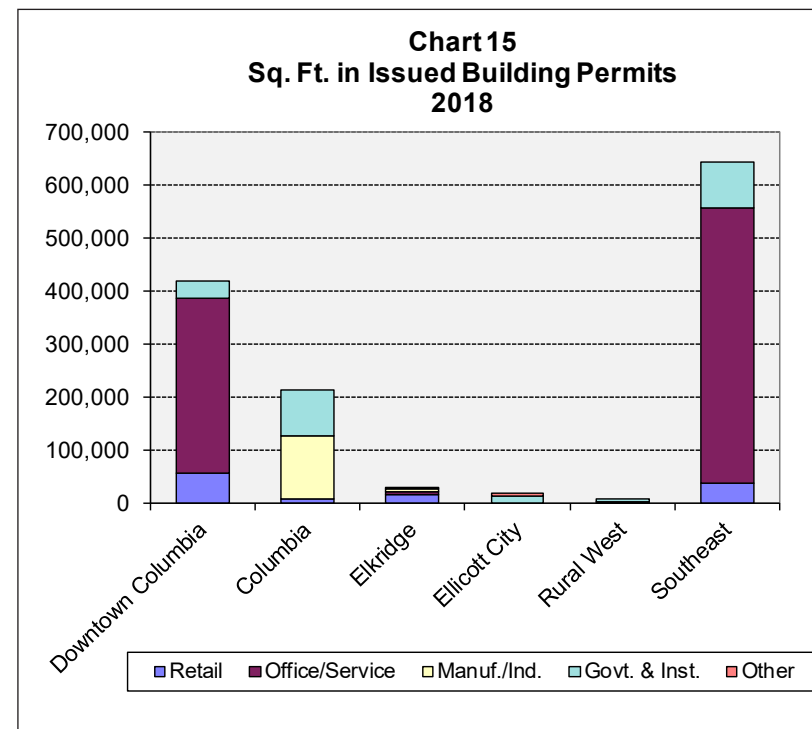
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	420,529	32%	4	7%
All Other Columbia	213,064	16%	18	30%
Elkridge	30,638	2%	13	21%
Ellicott City	18,534	1%	4	7%
Rural West	9,077	1%	5	8%
Southeast	642,671	48%	17	28%
TOTAL	1,334,513	100%	61	100%

Table 59 shows the approved square footage by building type. About 853,000 square feet, 64% of the total, are for office/service uses, the majority of which is in the Southeast. Another 17%, about 225,000 square feet, are for governmental and institutional uses. About 9% each of the total, or 125,000 square feet each, are for retail and manufacturing/extensive industrial uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 59
Building Square Feet in Issued Non-Residential Building Permits in 2018

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	57,419	329,390	0	33,720	0	420,529
All Other Columbia	8,218	0	120,229	84,617	0	213,064
Elkridge	17,951	5,240	3,330	0	4,117	30,638
Ellicott City	0	0	0	15,270	3,264	18,534
Rural West	4,032	0	0	5,045	0	9,077
Southeast	38,133	517,976	0	86,562	0	642,671
TOTAL	125,753	852,606	123,559	225,214	7,381	1,334,513
PERCENT	9.4%	63.9%	9.3%	16.9%	0.6%	100.0%

Chart 15
Sq. Ft. in Issued Building Permits 2018



Last Year's Projects - Greater than 25,000 Square Feet

Of the 1.3 million total square feet of non-residential building space in issued permits over the current reporting period, 1.2 million square feet, 86% of the total, were in projects larger than 25,000 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 consists of a new 329,000 square foot office building in the Crescent Neighborhood of Downtown Columbia. A permit was also issued for 57,000 square feet of retail space on the first floor of a new residential building in the Crescent Neighborhood. Additional work at Merriweather Post Pavilion is also underway.

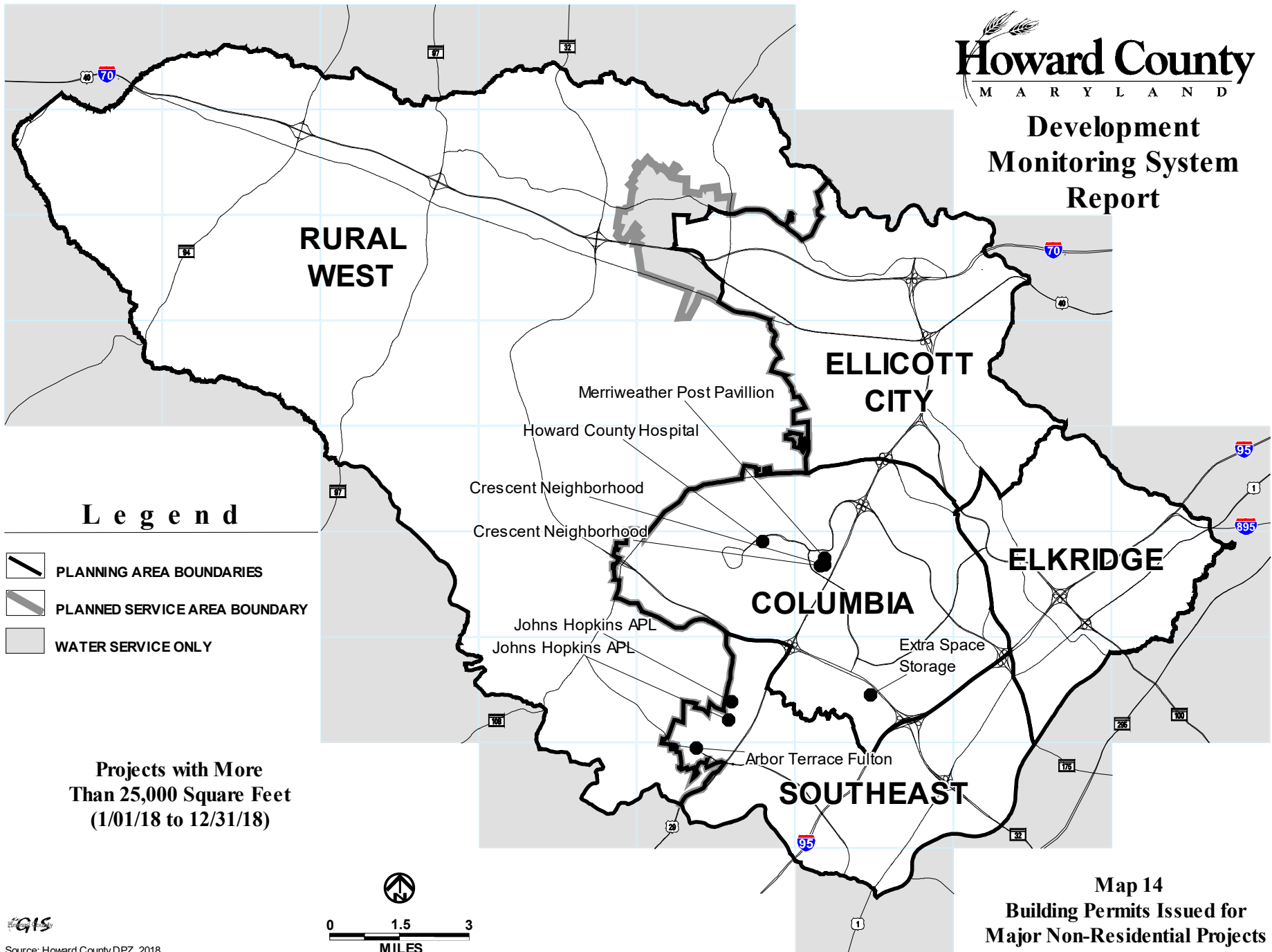
Two larger projects in the non-Downtown portion of Columbia began construction in 2018—a 119,000 square foot climate controlled self-storage building and a 51,000 square foot addition to the Howard County General Hospital.

In the Southeast, two new office buildings were permitted (265,000 square feet and 224,000 square feet) at the Johns Hopkins Applied Physics Lab. In addition, a 76,000 square foot assisted living facility, Arbor Terrace in Fulton, receive a building permit to begin construction.




Table 60
Building Permits Issued for Major Non-Residential Projects With More Than 25,000 Square Feet in 2018

Region	Name	Proposed Use	Square Feet	TOTAL
Downtown Columbia	Crescent Neighborhood	Office Building	329,390	419,729
	Crescent Neighborhood	Retail Space on 1st Floor New Residential Bldg.	56,619	
	Merriweather Post Pavillion	Seating Area Renovation	33,720	
Columbia	Extra Space Storage	Climate Controlled Self-Storage Building	118,882	169,856
	Howard County Hospital	Emergency Department Addition	50,974	
Southeast	Johns Hopkins APL	Office and Laboratory Building	264,972	564,498
	Johns Hopkins APL	Office Building	223,742	
	Arbor Terrace Fulton	Assisted Living and Memory Care Facility	75,784	
TOTAL				1,154,083

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-  PLANNED SERVICE AREA BOUNDARY
-  WATER SERVICE ONLY

**Projects with More
Than 25,000 Square Feet
(1/01/18 to 12/31/18)**



**Map 14
Building Permits Issued for
Major Non-Residential Projects**

GIS
Source: Howard County DPZ, 2018.

Five Year Results

Table 61 shows issued non-residential building permits countywide for the last five reporting periods from 2014 to 2018. Over this five year time-frame there were 387 permits issued for about 5.8 million square feet of building space. This equates to an annual average of about 1.2 million square feet per year.

The latest reporting period, with 1.3 million square feet in issued permits, is almost double the 678,000 square feet permitted the year before, and the second greatest amount of all five years.

Table 62 shows the five year history by building type. Over the five years, 35% of the total 5.8 million square feet was for office/service space. About 24% was manufacturing/extensive industrial space, another 22% for government and institutional uses, 10% for retail space, and 9% for other uses. Chart 16 shows this five year history graphically.

Table 61
Issued Non-Residential Building Permits
2014 to 2018

Year	Square Feet	Number of Permits
2014	915,359	67
2015	1,280,147	88
2016	1,556,122	89
2017	678,193	82
2018	1,334,513	61
TOTAL	5,764,334	387
ANNUAL AVG.	1,152,867	77

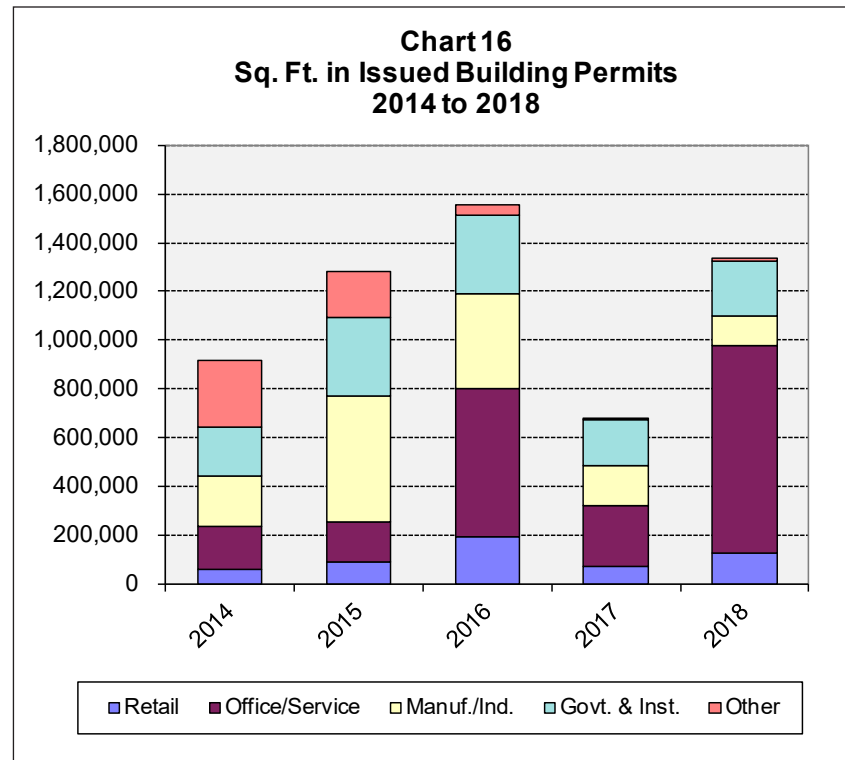


Table 62
Building Square Feet in Issued Non-Residential Building Permits
2014 to 2018

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2014	61,809	175,405	205,292	199,862	272,991	915,359
2015	92,482	161,620	517,991	321,881	186,173	1,280,147
2016	192,019	609,632	390,168	323,500	40,803	1,556,122
2017	75,222	248,127	160,646	192,073	2,125	678,193
2018	125,753	852,606	123,559	225,214	7,381	1,334,513
TOTAL	547,285	2,047,390	1,397,656	1,262,530	509,473	5,764,334
PERCENT	9.5%	35.5%	24.2%	21.9%	8.8%	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, 2018, to December 31, 2018, could accommodate an estimated 3,005 employees (Table 64). About 52% of the potential jobs are located in Downtown Columbia, mostly all office jobs. About 35% of the potential jobs are located in the Southeast, 11% are located in Elkridge, 2% in the Rural West, and 1% in Ellicott City.

Countywide, 2,198 potential jobs, about 73% of the total, are office/service jobs. Another 359 are government & institutional jobs (12%), 273 are retail jobs (9%), and 175 are manufacturing/extensive industrial jobs (6%).

Table 64
Potential Employment from Approved Non-Residential SDP's in 2018
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	201	1,356	0	0	1,557	52%
All Other Columbia	6	0	0	0	6	0%
Elkridge	13	0	0	310	323	11%
Ellicott City	29	0	0	0	29	1%
Rural West	0	0	0	49	49	2%
Southeast	25	842	175	0	1,042	35%
TOTAL	273	2,198	175	359	3,005	100%
PERCENT	9.1%	73.1%	5.8%	11.9%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 65 below, there is a potential of 4,229 new jobs that could be accommodated based on issued building permits. About 79% of the total are potential office/service jobs, mostly in the Southeast and Downtown Columbia. This is followed by 11% government and institutional jobs, 7% retail jobs and 3% manufacturing/extensive industrial jobs.

Table 65
Potential Employment from Issued Building Permits in 2018
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	144	1,318	0	67	1,529	36%
All Other Columbia	21	0	120	169	310	7%
Elkridge	45	21	3	0	69	2%
Ellicott City	0	0	0	31	31	1%
Rural West	10	0	0	10	20	0%
Southeast	95	2,072	0	173	2,340	54%
TOTAL	314	3,410	124	450	4,299	100%
PERCENT	7.3%	79.3%	2.9%	10.5%	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 there are a lot more non-wage and salary jobs. These would include proprietors and also include part-time jobs.

Table 66 shows both DLLR and BEA employment data beginning in 2001. BEA data have a one year reporting time lag resulting in no available data for 2018. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,241 jobs per year for the last 17 years. Job losses for 2009 and 2010 due to the most recent recession, and losses in a few other years, as reported by DLLR have lowered the longer term average.

Jobs reported by the BEA through 2017 (the latest year available) result in an annual average of 3,856 new jobs from 2001 to 2017. This higher average job growth reflects the increasing number of proprietors.

For the most recent reporting period, from 2017 to 2018, the State reports an increase of 1,116 jobs in Howard County. This follows a larger 2,663 job increase the previous year.

Table 67 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2017 and 2018. In the first quarter of 2018, DLLR reported that there were 168,817 jobs in Howard County with an average weekly wage of \$1,349. This compares to 167,701 jobs one year earlier with an average wage of \$1,309 reflecting a 3.1% 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
2001	130,717		171,966	
2002	133,338	2,621	174,102	2,136
2003	133,231	(107)	174,407	305
2004	136,493	3,262	179,546	5,139
2005	135,462	(1,031)	185,045	5,499
2006	141,236	5,774	193,851	8,806
2007	145,385	4,149	198,183	4,332
2008	147,573	2,188	200,059	1,876
2009	142,266	(5,307)	198,351	(1,708)
2010	141,169	(1,097)	200,426	2,075
2011	147,357	6,188	206,672	6,246
2012	154,504	7,147	213,578	6,906
2013	156,400	1,896	217,451	3,873
2014	155,951	(449)	219,385	1,934
2015	159,531	3,580	227,055	7,670
2016	165,038	5,507	230,918	3,863
2017	167,701	2,663	233,656	2,738
2018	168,817	1,116		
Average		2,241		3,856

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, 2017 and 2018

Job Type	2017		2018	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	629	\$1,557	663	\$1,585
State Government	1,738	\$1,020	1,693	\$1,090
Local Government	14,814	\$1,067	14,834	\$1,111
Subtotal/Average	17,181	\$1,080	17,190	\$1,127
Goods Producing				
Natural Resources and Mining	297	\$941	283	\$1,111
Construction	11,398	\$1,369	11,736	\$1,402
Manufacturing	8,124	\$1,692	8,204	\$1,673
Subtotal/Average	19,820	\$1,495	20,224	\$1,508
Service Providing				
Trade, Transportation, and Utilities	33,998	\$1,067	33,673	\$1,093
Information	3,947	\$2,258	3,743	\$2,219
Financial Activities	10,042	\$1,935	10,281	\$2,094
Professional and Business Services	44,814	\$1,800	45,021	\$1,862
Education and Health Services	18,342	\$906	19,062	\$919
Leisure and Hospitality	15,105	\$408	15,213	\$418
Other Services	4,447	\$746	4,407	\$782
Subtotal/Average	130,695	\$1,311	131,402	\$1,353
TOTAL	167,701	\$1,309	168,817	\$1,349

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

Howard County Department of Planning and Zoning
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