



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

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Development Monitoring System Report

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Executive Summary

Adequate Public Facilities Act

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

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

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

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

Development Monitoring System Report (DMS)

This is the 28th 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, require that local jurisdictions report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas 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 annual DMS report. There are some additional requirements that are now also included in this report, specifically in the section 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 2019.

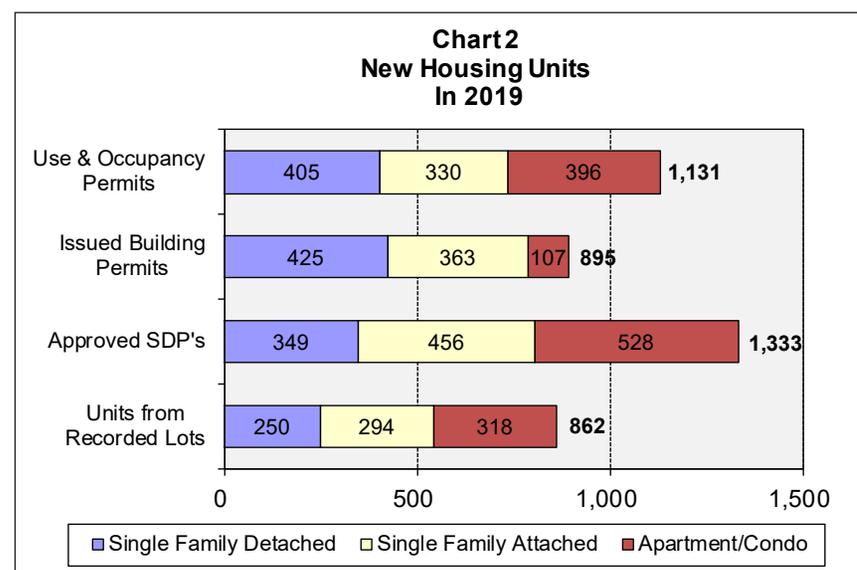
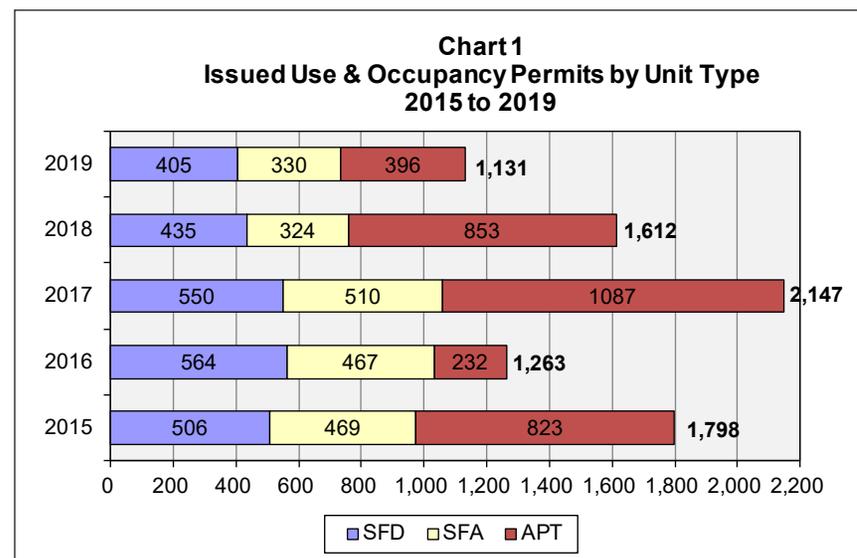
The reporting of these additional items meets the State planning requirements and enable a better understanding of Howard County's land development issues, policies and goals.

Residential Development

Total Housing Activity

- During the latest reporting period, from January through December 2019, 1,131 housing units were built. This is a decrease from the previous reporting period when 1,612 units were built, and the smallest number built over the last five years (Chart 1).
- Of the 1,612 completed units last year, 36% were single family detached units, 29% were townhouse units and 35% 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 1,590 new housing units built in the County. About 31% of these have been single family detached units, 26% single family attached or townhouse units, and 43% apartment units (including both rental and condo).
- Last year, 54% of all units were built in Elkridge, 22% in Ellicott City, 10% in the Rural West, 8% in the Southeast, 5% in non-Downtown Columbia and no units built in Downtown Columbia. (See the map on Page 6 that show the five planning areas and Downtown Columbia.)
- There were 895 building permits issued (housing starts) during 2019 (Chart 2). This is 58% less than the 2,475 permits issued in 2019.
- In 2019, there was potential for 862 housing units from recorded lots and 1,333 units approved in site development plans (Chart 2).
- As of December 31, 2019, there were 5,975 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 6,937 units in process for the prior reporting period (December 31, 2018). Many of these units are part of phased plans.
- A significant number of the in-process units—4,712 or 79% of the total 5,975—are included in future phases of phased projects with development planned as far out as 2029. The larger phased plans include Laurel Park Station, Maple Lawn South and the Milk Producers in the Southeast; The Overlook at Blue Stream and Elkridge Crossing II 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, 20% of the units in process on December 31, 2019, were single family detached units. About 20% were single family attached units and another 60% were apartment units (including both condo and rental).



Age-Restricted Units

- There were 70 age-restricted housing units built in 2019, 6% of the 1,131 total units built in the County. Of these, 1 was a single family detached home, 21 were townhouse units and 48 were apartment units.
- As of December 31, 2019, there were 149 age-restricted units in the planning process. This includes 125 apartment units in the Lakefront Neighborhood of Downtown Columbia and 24 townhouse units as part of Eden Brook. For the previous reporting period there were 114 age-restricted units in the subdivision process.
- Since the 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, 16% of all new homes built in Howard County have been age-restricted.

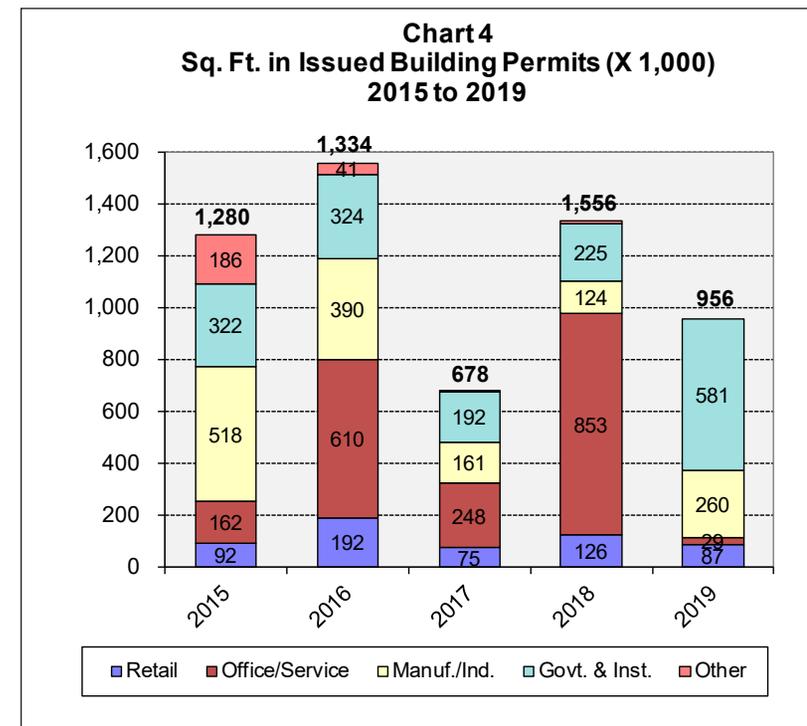
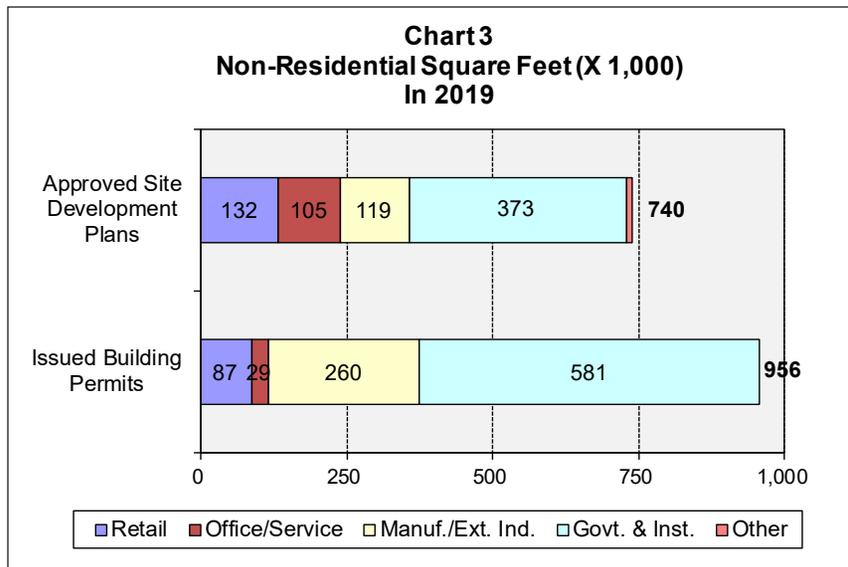
Moderate Income Housing Units (MIHU)

- During 2019 there were 88 MIHU units in approved plans—60 townhouse units and 28 apartment units. This is less than the 136 approved MIHU units the previous reporting period.
- As of December 31, 2019, there were 626 MIHU units in process—3 single family detached units, 66 townhouse units and 557 apartment units. About 36% of the units are in Downtown Columbia, 26% in the Southeast, 25% in Elkridge, 8% in Ellicott City, and 4% in non-Downtown Columbia. There were 701 MIHU units in process the previous reporting period.
- Of the 626 MIHU units in process, 10 are in the Lakefront Neighborhood age-restricted proposal.

Non-Residential Development

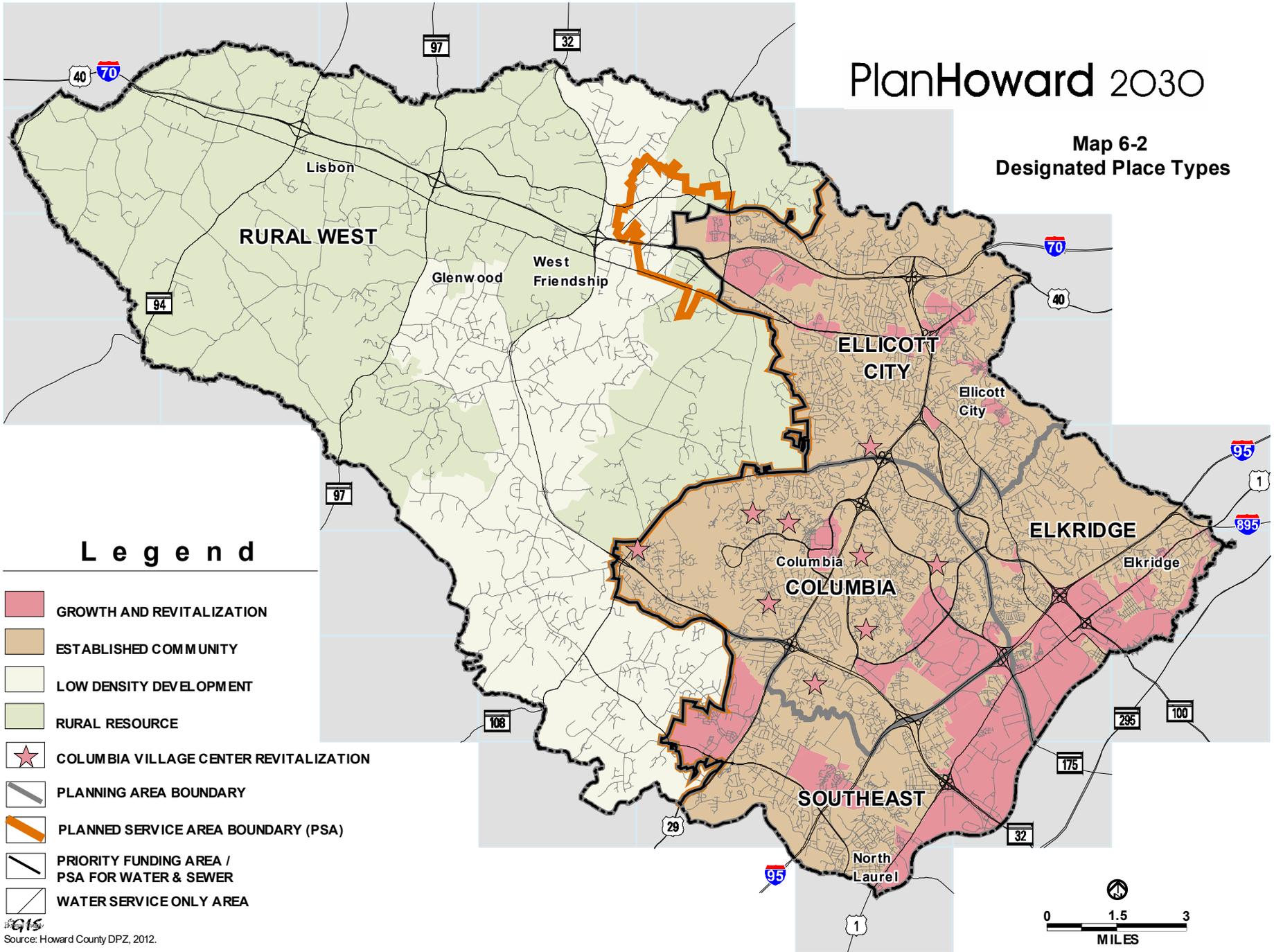
- In 2019, about 740,000 square feet of building space were approved in site development plans. Building permits were issued for 956,000 square feet. (Chart 3).
- As shown in Chart 4 there was a decrease in the square footage of issued building permits last year, from close to 1.6 million square feet issued in 2018 to 956,000 square feet issued in 2019, which was the second lowest amount in the last five years.
- About 28% of the new building space constructed last year is located in the Southeast, 28% in non-Downtown Columbia, and 10% each in Elkridge and Ellicott City. About 12% of the total was constructed in the Rural West, and 12% each in Downtown Columbia.
- Over the last five years, there was an annual average of about 950,000 square feet in approved non-residential site development plans and 1.2 million square feet in issued non-residential building permits.

- As of December 31, 2019, there were 1.2 million square feet of building space under plan review in non-residential site development plans. This is 9% more than the 1.1 million square feet under review the previous year.
- According to the State Department of Labor, Licensing and Regulation, Howard County gained 2,132 jobs last year (1st quarter 2018 to 1st quarter 2019 estimates). The total number of jobs in Howard County as of the 1st quarter 2019 was 170,949.



PlanHoward 2030

Map 6-2
Designated Place Types



Smart Growth Information

Smart, Green and Growing Legislation

This section of the DMS report has been produced to satisfy amendments to State law enacted in 2009, known collectively as the Smart, Green and Growing legislation. All jurisdictions in Maryland are required to report on development activity, comment on consistency with state and local smart growth goals, track defined measures and indicators, and report on APFO restrictions in priority funding areas and the resolution of the restrictions. 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 five-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 2019 in support of the current General Plan, known as *Plan-Howard 2030*.

CB 20-2019 — Tiber Branch Watershed and Plumtree Branch Watershed Safety Act

This bill extends the Effective Period of the temporary prohibition on the issuance of certain permits and certain approvals of development plans and zoning changes for property that drains wholly or partly to the Tiber Branch Watershed or the Plumtree Branch Watershed in Howard County that was imposed by CB 56-2018; and declaring this to be an emergency bill.

CR 34-2019 — Historic Sites Inventory

This resolution adds eleven additional historic sites to the Howard County Historic Site Inventory.

CR 35-2019 — Cemetery and Grave Site Inventory

This resolution adds two additional cemeteries to the Howard County Cemetery and Grave Site Inventory.

CB 39-2019 — Development Rights and Responsibilities Agreements

This bill amends the Howard County Code to repeal the Development Rights and Responsibility Agreements provision and replaces the repealed provision with provisions for amending and terminating executed agreements; and generally relating to Development Rights and Responsibility Agreements.

CB 42-2019 — School Facilities Surcharge

This bill increases the School Facilities Surcharge in accordance with Chapter 744 of the Acts of the Maryland General Assembly of 2019, increasing the surcharge amount from \$1.32 per square foot to \$7.50 per square foot, phased in over 2 years.

CB 50-2019 — Moderate Income Housing Units

This bill amends the code for implementing the County's Moderate Income Housing Unit program including changes to accounting for Disability Income Housing, adding unit type and size for studio apartments, amending the fee in lieu option, and other items.

CR 97-2019 — Robinson Overlook APFO School Test Exemption

This resolution approves the terms and conditions of a Payment in Lieu of Taxes Agreement by and between the Howard County, Maryland and Robinson Overlook Limited Partnership for a rental housing development, and finding that the Development meets the requirements of certain Special Affordable Housing Opportunities exempting the Development from requiring to pass the APFO Schools Test.

CR 123-2019 — Storm Drainage Design Manual

This resolution amends Volume I, Storm Drainage, of the Design Manual providing that development within the Tiber Branch and Plumtree watersheds provide adequate management and conveyance of runoff for the 24-hour, 100-year and 3.55-hour, 6.6-inch storm event to a stormwater management facility.

CR 133-2019 — Commercial Solar Facilities Task Force

This resolution creates a Task Force to study commercial solar facilities on agricultural land preservation parcels.

CR 143-2019 — Master Plan for Water and Sewerage

This resolution approves the 2019 Interim Amendment to the Howard County Master Plan for Water and Sewerage, consisting of text, tables, and maps incorporating various revisions based on and including: 1. Changes to capital projects related to the capital budget, the ten-year capital improvement program, or completed engineering studies; 2. The entry of properties into the County's Metropolitan District; 3. Changes in service area priorities for individual property parcels, subdivisions and developer projects based upon the review of capital and developer project progress; and 4. Changes to the water and sewer Planned Service Area.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation (zoning text) amendments that were approved in Howard County in 2019.

CB 30-2019 — Corridor Activity Center (CAC)

This bill amends the maximum floor area requirements for a hotel in a Corridor Activity Center District in developments on parcels less than 20 acres in size to a maximum of 50,000 square feet.

CB 31-2019 — Age-Restricted Adult Housing Conditional Uses

This bill amends the Howard County Zoning Regulations to require Age-Restricted Adult Housing Conditional Uses with densities that exceed the base zoning district to have frontage on and direct access to a collector or arterial road; and to allow Age-Restricted Adult Housing as a Conditional Use in the Rural Conservation (RC) and Rural Residential (RR) zoning districts.

CB 65-2019 — Commercial Athletic Facilities

This bill amends the Howard County Zoning Regulations to authorize the hearing authority to reduce the setback for buildings and parking uses associated with Commercial Athletic Facilities to no less than 25 feet if the petition includes detailed plans for screening that presents an attractive and effective visual barrier for neighboring properties.

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 2019.

CB 4-2019 — Reporting on Necessary Disturbances

This bill amends the Howard County Code requiring the Department of Planning and Zoning to report on the necessary disturbance exemption for development near wetlands, streams, and steep slopes, and generally relating to the protection of wetlands, streams and steep slopes.

CB 61-2019 — Criteria for Granting Waivers

This bill amends the criteria for granting waivers from the requirements of the Howard County Subdivision and Land Development regulations,

requiring survey bearings and distances on plans to delineate wetlands and required wetland and stream buffers, prohibiting the impact on certain steep slopes established by the prior development of the property, requiring that the Office of Community Sustainability and the Department of Public Works review certain requests for necessary disturbances, establishing criteria for alternative compliance from the provisions of the Subdivision and Land Development Regulations, and providing that the Office of Transportation will also review requests to eliminate sidewalk requirements.

CB 62-2019 — Forest Conservation Act

This bill repeals and reenacts the Forest Conservation Act of Howard County, requiring a Forest Conservation Plan for any person, or unit of local government, developing land 40,000 square feet or greater, subject to certain exceptions; requiring a Declaration of Intent for certain exemptions, setting forth the requirements of a Forest Conservation Plan, providing for the review process of a Forest Conservation Plan, requiring a Forest Conservation Manual to be prepared and adopted, and other implementing details of forest conservation.

CB 63-2019 — Development Along Scenic Roads

This bill amends the Howard County Code by clarifying that new developments outside of the Planned Service Area must continue to maintain a certain buffer, altering the requirements for a certain buffer between a road and a new major subdivision that is located along a Scenic Road, and altering a certain approval process for a major or minor subdivision that abuts or adjoins a scenic road.

CR 99-2019 — 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.

CR 142-2019 — Forest Conservation Fees-In-Lieu

This resolution increases the Forest Conservation fees-in-lieu and non-compliance fees. Afforestation and reforestation fees increase from \$0.75 to \$1.25 per square foot within the PSA and from \$0.95 to \$1.50 per square foot outside the PSA. Easement abandonment fees increase from \$1.25 to

\$2.00 per square foot. Non-compliance fees increase from \$1.25 to \$5.00 per square foot.

CR 145-2019 — Variances for the 13th High School

This resolution grants variances for government uses from the use setbacks and height requirements for the 13th high school and ancillary roads, parking, sports fields, fences, and bleachers to be constructed on property located along Mission Road in Jessup, Howard County, Maryland.

Zoning Map Amendments

There were no amendments to the zoning map in 2019.

Major Infrastructure

New Roads and Changes in Roads

In 2019, 10.22 miles of new or extended roadway were constructed in Howard County. These additions were built in 32 new and existing subdivisions as part of developer's agreements executed with the County and other planned improvements. Detailed information about all roadway construction projects is documented in Howard County's 2019 annual report to the State Highway Administration. The road additions are all shown on Map 1.

School Additions and Renovations

The Howard County Public School System (HCPSS) has several projects in the planning stages in 2019. Renovation and expansion efforts continue to be concentrated within the priority funding area.

New High School 13

New High School 13 will be a new facility and is needed to accommodate projected enrollment growth. The school is an adaptation of the original three-story prototype high school design, which was designed to accommodate a population of 1,650 ninth through twelfth grade students. The school will be located on Mission Road, north of MD 32 and is anticipated to begin construction in spring 2020.

Talbot Springs Elementary School Replacement

The Talbott Springs Elementary School project will replace an aging elementary school with a modern facility. Talbott Springs opened in 1973 and was renovated in 2000. The art room and gymnasium were expanded in 2000, and all-day kindergarten was added in 2008. The school will be completely replaced to provide students with a modern energy efficient building in compliance with the HCPSS General Educational Specifications. This project calls for an expansion of the educational program spaces, including additional programmatic space needed for Title I services. The project is located on the current site, and construction is anticipated to start in fall of 2020.

Hammond High School Renovation and Addition

The Hammond High School project will renovate and expand the existing school. Hammond High School is a one-story building that first opened in 1976 and underwent renovation and addition work in 1996, followed by a

dance studio addition in 2011. The present need is a complete renovation of the school with systemic upgrades to bring it into compliance with the Howard County Public School Systems Guidelines Manual for Renovations and Modernizations of Existing Schools. An addition of 200 seats of new capacity is planned for this project. Construction is anticipated to start in fall of 2020.

Systemic Renovation Projects

Systemic renovation projects include improvements and installation of systems at various school sites, including projects of a critical nature such as sprinkler repair, HVAC repair, and window replacement. The following HVAC replacements are underway at Burleigh Manor Middle School, Mount View Middle School, Pointers Run Elementary School and Rockburn Elementary School.

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

In 2019, further work on Blandair Regional Park was completed, including finalizing the road construction in and around Phase J of the park.

Additional upgrades to the Little Patuxent Wastewater Treatment Plant (LPWTP) in Savage were also completed, including upgrades the digester equipment, phosphorus precipitation, motor control center, gravity belt thickeners, waste gas burner, solids screening area equipment, and ancillary equipment buildings, along with other important plant upgrades.

A new 36-inch US 29 water transmission main was completed from Little Patuxent Parkway to MD 108. A 12-inch water transmission main along Montgomery Road near Millers Corner was completed. A 30-inch water transmission main extension was installed on Broken Land Parkway. Pumping stations were constructed and upgraded on Whiskey Bottom Road, Edgar Road, and Dorsey Run Road.

The Thomas B. Dorsey Building was demolished to make way for the new Circuit Courthouse to be constructed there. This courthouse is currently under construction.

Also, in 2019, the County placed seven new transit vehicles into service. The fixed route service received two 35-foot low floor buses at a cost of \$740,000 and the paratransit service (RTA Mobility) received five vehicles at a cost of \$285,000.

Consistency

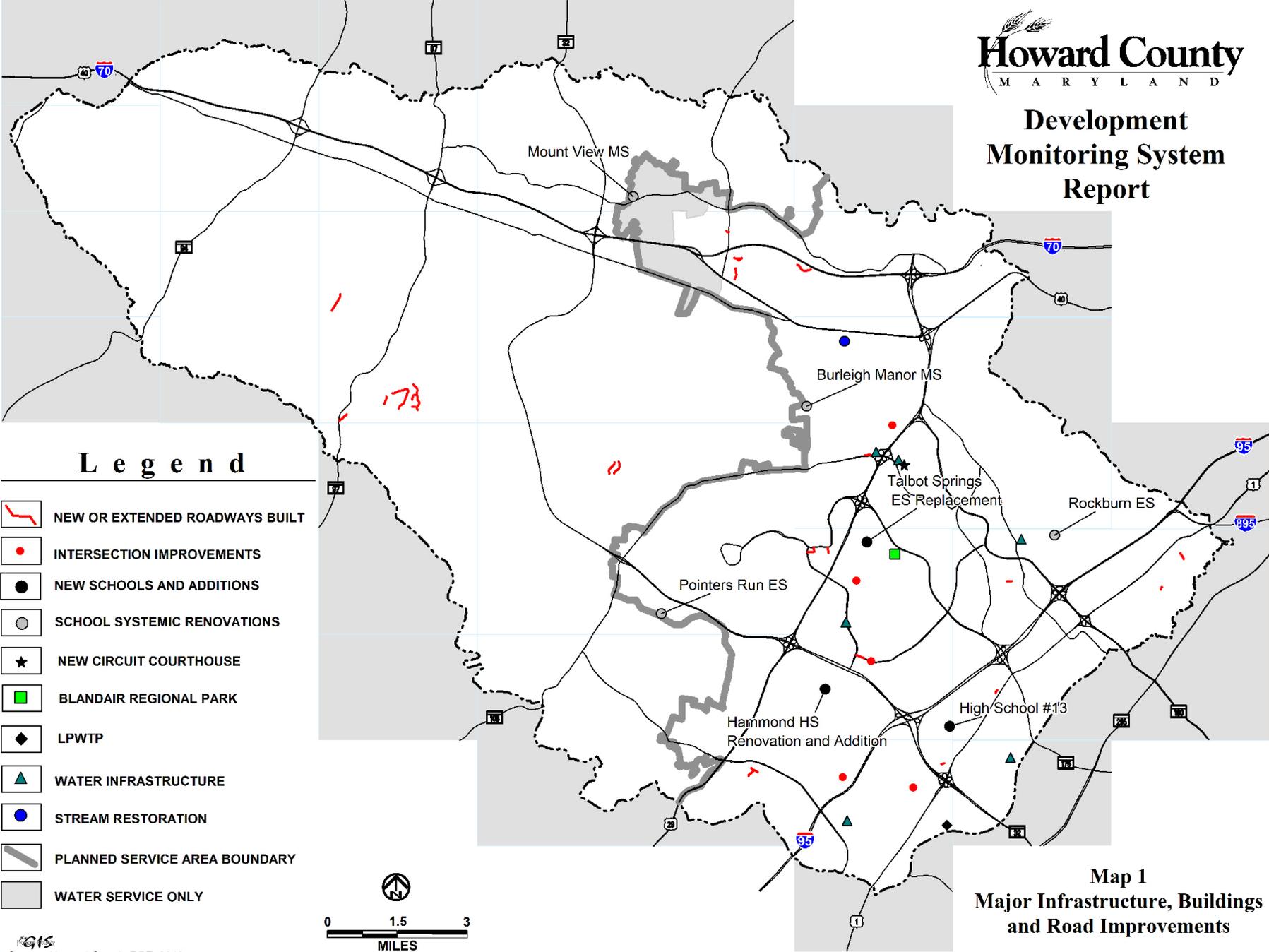
The Smart, Green and Growing Legislation requires that development patterns and infrastructure improvements that have occurred over the last year be evaluated for consistency with adopted local plans. An evaluation of whether these changes are consistent with each other as well as the adopted plans of 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 infrastructure and school projects that have been completed in 2019 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 the various amendments to the Subdivision and Land Development Regulations, updates to the Storm Drainage Design Manual, additions to the Historic Sites and Cemetery inventories, amendments to the Moderate Income Housing Unit regulations, among other action items listed beginning on Page 8 above.



Development Monitoring System Report



Legend

- NEW OR EXTENDED ROADWAYS BUILT
- INTERSECTION IMPROVEMENTS
- NEW SCHOOLS AND ADDITIONS
- SCHOOL SYSTEMIC RENOVATIONS
- NEW CIRCUIT COURTHOUSE
- BLANDAIR REGIONAL PARK
- LPWTP
- WATER INFRASTRUCTURE
- STREAM RESTORATION
- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Map 1
Major Infrastructure, Buildings
and Road Improvements

Source: Howard County DPZ, 2019.

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 Ordinance (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 2019

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.

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 2019, there were no residential subdivisions delayed due to allocation limitations. This is the fourth 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 four years have been an exception and reflects the recent slowdown of new subdivision projects submitted for review and approval.

The Allocations chart, which must be approved by the County Council, is adopted each July. The current chart was adopted on July 2, 2018. The Howard County Council did not adopt a new allocations chart in July 2019 due to a concern that the number of allocations that would be available in the new chart, at more than 3,000 over the next two years, is too high. This high number in the proposed annual chart had resulted from the "rolling average" provision of APFO, which allows unused allocation to roll forward into future years. Given that the number of new residential plans requesting allocations has slowed over the last several years, this has resulted in this gradual buildup of available allocations.

An amendment to APFO was recently introduced by the County Council that would reduce the number of available allocations back down to the original General Plan target of 1,850 allocations for the current and future APFO years (plus the allocations for Downtown Columbia, which are treated separately). The amendment would also limit the rolling average to no more than 10% of any unused allocations. This will limit the future annual buildups of unused allocations, precluding the possibility of a large number of housing units being built in a single year or years. This amendment is really only a precautionary measure, as the number of new plans has slowed dramatically and are unlikely to increase in the near term. Furthermore, this amendment is a temporary measure and is set to expire with the adoption of Howard County's next General Plan, anticipated to be completed at the end of 2021, as this new plan will include new alloca-

tion targets most likely using new allocation geographies. If adopted, this amendment will be effective at the beginning of June 2020 in time for the adoption of a new allocation chart in July 2020.

Closed School Restrictions in 2019

After a development project receives allocations, it then takes the School Capacity test. To pass this test the elementary school district, the elementary school region, the middle school district, and the high school district where the project is located must each be under 105%, 105%, 110%, and 115% local-rated capacity, respectively. Howard County has 42 elementary schools, 20 middle schools, and 12 high 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 2019 there were 19 closed elementary school districts, 6 closed middle school districts, and 6 closed high school districts. This resulted in a total of 423 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 proposed FY21 six-year capital budget includes funding for planning and construction for five new or replacement schools and additions to add student capacity. The final FY21 capital budget will be adopted by the Howard County Council at the end of May 2020.

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) became effective with the adoption of the July 2019 School Capacity chart and have had a significant impact on proposed new residential development. In the 9 months since July 2019, the number of presubmission community meetings for new residential development has dropped significantly to only 10 meetings with 50 residential units. This compares to an average of 36 meetings with 1,185 new units every 9 months since 2010 through the first half of 2019 before the reduced capacity utilization percentages and the new high school test took effect.

The Howard County Public School System completed a comprehensive redistricting in November 2019, which has re-balanced capacity utilization among schools, better utilizing available systemwide capacity. This new redistricting will become effective with the school year beginning in the fall of 2020. The new School Capacity chart that will reflect the latest pupil projections under the new school district boundaries will be completed at the end of May 2020. Capital projects expanding capacity will be included in this new chart and will provide some relief, potentially opening up more school districts to development.

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 should 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 have been actions to address each of these three items. APFO has been amended, and the next general plan update is on the horizon. Regarding funding, the General Assembly adopted enabling legislation in the 2019 session to allow the Howard County Council to raise the school surcharge rate on new residential construction. The County Council acted on this, adopting a local bill in November 2019 (effective January 6, 2020) raising the school surcharge from \$1.32 per square foot of new residential construction to \$7.50 per square foot, with the increase phased in over 2 years. This increase will bring in needed additional revenues for school construction. However, these increased revenues will be limited to the extent that new residential development does not occur given APFO restrictions. Regarding redistricting, the Howard County Board of Education completed a comprehensive redistricting for the upcoming 2020/21 school year to more effectively utilize existing systemwide capacity.

Lot Densities

The information provided in the subsequent sections of this report include details on the amount, type and location of development in Howard County in 2019. 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 2019 based on building permit completions. A weighted average of density is calculated from built dwelling units and their associated lot size.

The greatest average lot density occurred in Elkridge at 34 units per acre. This was followed by the Ellicott City at 8 units per acre, Southeast at 6 units per acre, and the non-downtown portion of Columbia at 6 units per acre. The Rural West, as expected, had the lowest average lot density at 0.75 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 23 units per acre. This compares to a much smaller lot density of 0.75 units per acre outside the PFA.

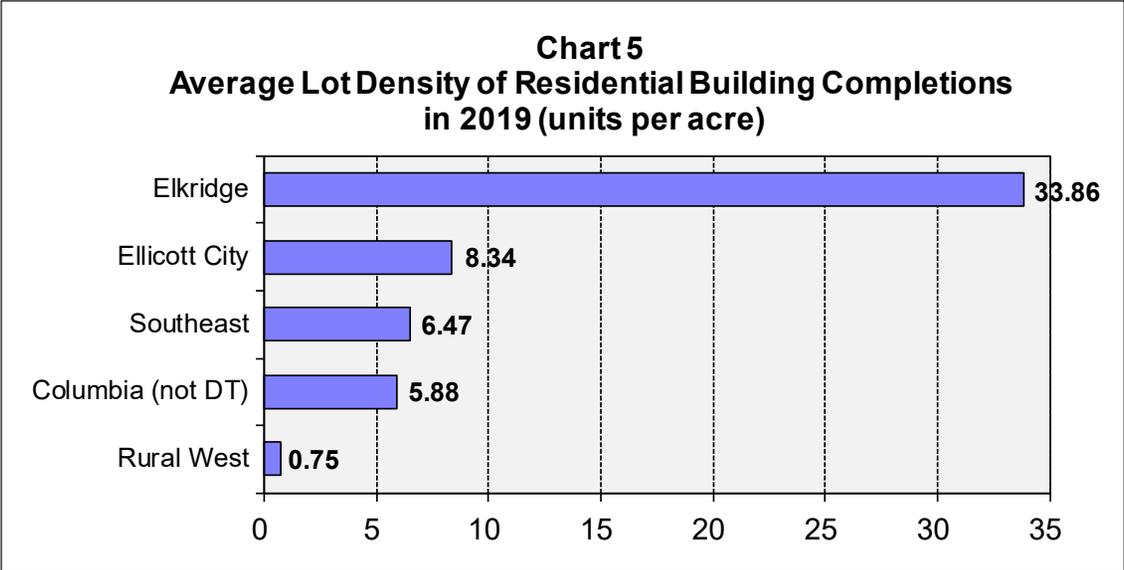
Map 2 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2019 - By Planning Area

Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Downtown Columbia	0	0%	0	0%	0.00
All Other Columbia	57	5%	17	3%	5.88
Elkridge	612	54%	42	8%	33.86
Ellicott City	254	22%	88	17%	8.34
Rural West	115	10%	343	67%	0.75
Southeast	93	8%	20	4%	6.47
TOTAL	1,131	100%	509	100%	21.10

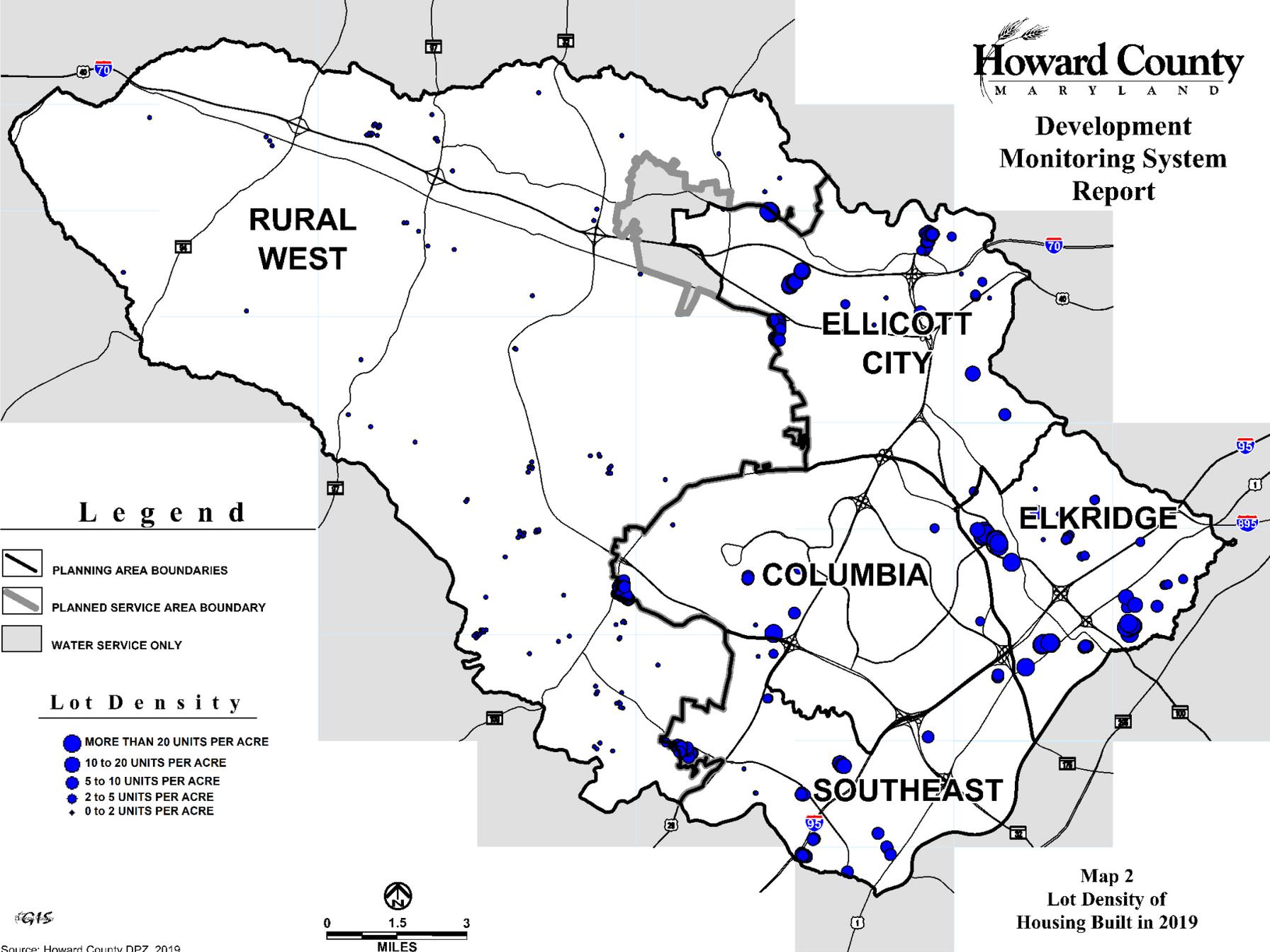
Table 2
Lot Density of Total Units Built in 2019 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,016	90%	167	33%	23.41
Outside PFA	115	10%	343	67%	0.75
TOTAL	1,131	100%	509	100%	21.10





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- PLANNED SERVICE AREA BOUNDARY
- WATER SERVICE ONLY

Lot Density

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

Map 2 Lot Density of Housing Built in 2019

Source: Howard County DPZ, 2019.

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 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 projections based on *PlanHoward 2030* from 2019 to 2030. A total of 1,100 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, 2019, 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 10.9% in 2030.

Table 3
PlanHoward 2030 Growth Projections
2019 to 2030

Inside PFA	21,750	95.2%
Outside PFA	1,100	4.8%
Total	22,850	100.0%

Table 4
Total Built Units in Howard County
September 30, 2019

Inside PFA	106,340	88.0%
Outside PFA	14,521	12.0%
Total	120,861	100.0%

Table 5
Total Units by 2030 based on PlanHoward 2030

Inside PFA	128,090	89.1%
Outside PFA	15,621	10.9%
Total	143,711	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 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 2019 were recorded or in existence prior to 2015, 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 its own area.

Summary of Latest Reporting Period

For the latest reporting period from January 1, 2019, through December 31, 2019, there was potential for 862 housing units from recorded lots countywide in 79 subdivision plans totaling 1,367 acres (Table 6). Elkridge had the most with 622 units, 72% of the total. Ellicott City had potential for 132 units, 15% of the total. There were 97 units in recorded subdivision plans in the Rural West (11%), 7 units in the Southeast (1%), and 4 units in Columbia. There was no unit potential in Downtown Columbia from

recorded subdivision plans in 2019. 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 1,367 acres recorded, 890 acres, or about 65%, 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.

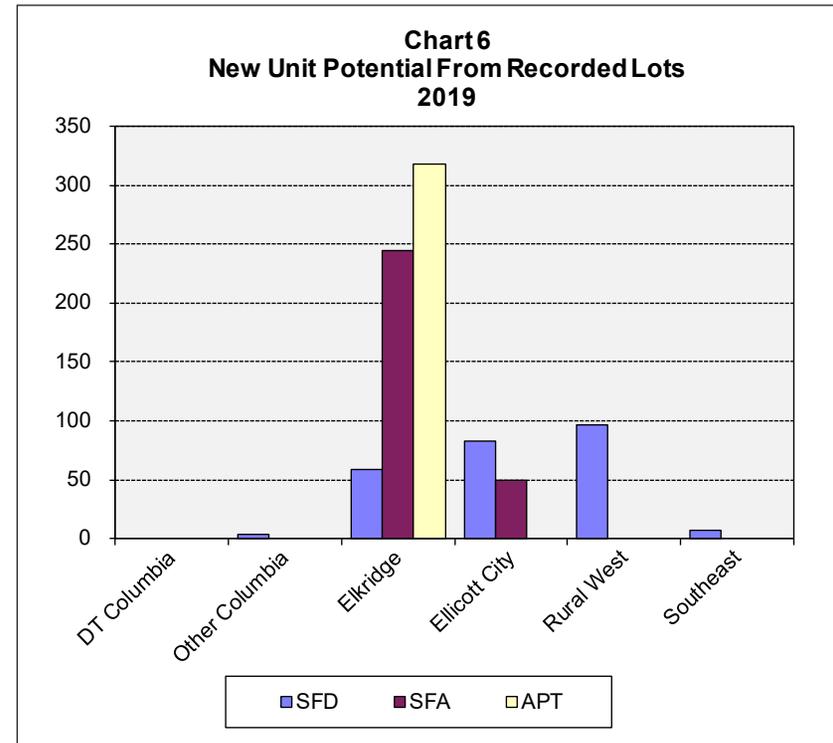
Table 7 shows new units from recorded lots by unit type. Of the 862 units from recorded lots, 250 are for single family detached units (SFD), 294 are for single family attached or townhouse units (SFA), and 318 are for apartment units (APT). Chart 6 shows these results graphically by Planning Area.

Table 6
Recorded Residential Subdivisions in 2019

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	4	0%	6	8%	32	2%
Elkridge	622	72%	15	19%	101	7%
Ellicott City	132	15%	21	27%	177	13%
Rural West	97	11%	27	34%	890	65%
Southeast	7	1%	10	13%	167	12%
TOTAL	862	100%	79	100%	1,367	100%

Table 7
Unit Potential from Recorded Lots by Unit Type in 2019

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	4	0	0	0	4	0%
Elkridge	59	245	318	0	622	72%
Ellicott City	83	49	0	0	132	15%
Rural West	97	0	0	0	97	11%
Southeast	7	0	0	0	7	1%
TOTAL	250	294	318	0	862	100%
PERCENT	29%	34%	37%	0%	100%	



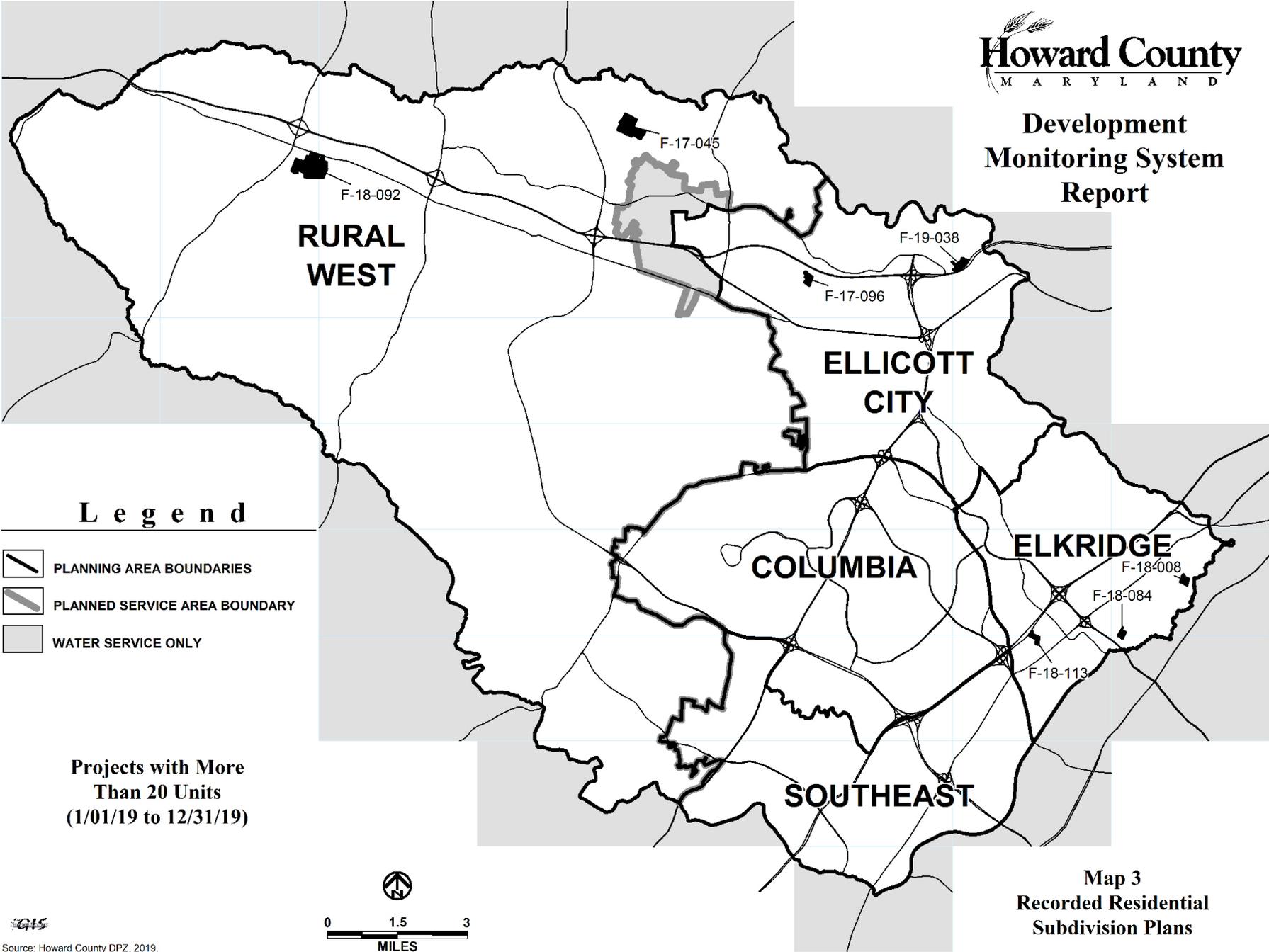
Last Year's Projects - Greater than 20 Units

Of the total 862 units from lots recorded for the latest reporting period, 746 or about 87% were in subdivisions consisting of more than 20 units. These larger subdivisions, shown in Table 8, are located in three of the six planning areas. The precise locations of these plans are shown on Map 3.

These larger recorded plans include Oxford Square Parcel H-H, Delacour at Blue Stream and Elkridge Woods in Elkridge; Turf Valley Pod E Phase 2 and Patapsco Crossing in Ellicott City; and Walker Meadows and Linden Grove Phase 1 in the Rural West.



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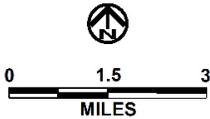
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Projects with More Than 20 Units (1/01/19 to 12/31/19)



Source: Howard County DPZ, 2019.



Map 3 Recorded Residential Subdivision Plans

Table 8
Recorded Residential Subdivision Plans, Projects With More Than 20 Units in 2019

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Elkridge	F-18-084	Oxford Square Parcel H-H	SFA & APT - 57 MIHU	374	594
	F-18-113	Delacour at Blue Stream	SFA - 34 MIHU	180	
	F-18-008	Elkridge Woods	APT - 40 MIHU	40	
Ellicott City	F-17-096	Turf Valley Pod E-1, Ph. 2	SFA & SFD	55	93
	F-19-038	Patapsco Crossing	SFD	38	
Rural West	F-17-045	Walker Meadows	SFD	35	59
	F-18-092	Linden Grove - Ph. 1	SFD	24	
TOTAL					746

Five Year Results

Table 9 shows the recorded subdivisions for the last five years beginning in 2015. Over this time period, lots for 5,474 units countywide in 446 subdivision plans totaling 10,211 acres were recorded. This equates to an annual average of 1,095 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 recordings 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, 2015 to 2019

Year	Units	Plans	Acreage
2015	908	100	2,570
2016	778	99	2,749
2017	1,229	84	1,746
2018	1,697	84	1,779
2019	862	79	1,367
TOTAL	5,474	446	10,211
ANNUAL AVG.	1,095	89	2,042

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 1,768 single family detached units, 32% of the total 5,474. A total of 1,406, 26%, were for single family attached units and the remaining 2,300, 42%, were for apartments units (rental and condo).

Table 10
Unit Potential from Recorded Lots by Unit Type, 2015 to 2019

Year	SFD	SFA	APT	MH	Total
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
2019	250	294	318	0	862
TOTAL	1,768	1,406	2,300	0	5,474
PERCENT	32%	26%	42%	0%	100%
ANNUAL AVG.	354	281	460	0	1,095

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, 2019, are tabulated and compared with those in process the prior year (as of December 31, 2018).

Number of Plans

There were 27 less residential plans in process as of December 31, 2019, than there were one year earlier – 134 plans in 2019 compared to 161 in 2018 (Table 11).

For the current year, Ellicott City had the greatest number of residential plans in process with 52, followed by Elkrige with 27, the Rural West with 21, the Southeast with 17, Columbia with 15, and Downtown Columbia with 2.

Of the 134 plans in process on December 31, 2019, 77 were final plans, 24 were environmental concept plans, 13 were preliminary equivalent sketch plans, 12 were sketch plans and 8 were preliminary plans.

Number of Potential Units

There were 962 less units in process on December 31, 2019, compared to the previous year – 5,975 units compared to 6,937 units (Table 12).

It is important to note that a significant number of the 5,975 units in pro-

Table 11
Number of Residential Subdivision Plans in Process, 12/31/19
(With comparisons to Countywide total as of 12/31/18)

Planning Area	Environmental		Preliminary Equivalent		Final	TOTAL PLANS
	Concept	Sketch	Sketch	Preliminary		
Downtown Columbia	0	0	0	0	2	2
All Other Columbia	2	0	1	2	10	15
Elkrige	9	3	2	3	10	27
Ellicott City	10	5	6	3	28	52
Rural West	1	0	3	0	17	21
Southeast	2	4	1	0	10	17
TOTAL	24	12	13	8	77	134
As of 12/31/18	32	18	12	4	95	161

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, 4,712 units are part of phased plans, with building planned as far out as 2029. Phased plans represent 79% 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 Blue Stream and Elkrige Crossing II in Elkrige; Turf Valley, Westmount, Taylor Highlands and Chapelgate Woods in Ellicott City; Cedar Creek (formally known as Simpson Oaks) in Columbia; and the Crescent and Lakefront neighborhoods in Downtown Columbia.

As reflected in Table 12, 20% of the units in process are single family detached units. About 20% are single family attached units and 60% 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, 12/31/19
 (With comparisons to Countywide total as of 12/31/18)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	1,616	0	1,616
All Other Columbia	142	138	0	0	280
Elkridge	94	204	507	0	805
Ellicott City	478	535	712	0	1,725
Rural West	173	0	0	0	173
Southeast	292	328	756	0	1,376
TOTAL	1,179	1,205	3,591	0	5,975
PERCENT	20%	20%	60%	0%	100%
As of 12/31/18	1,208	1,518	4,211	0	6,937

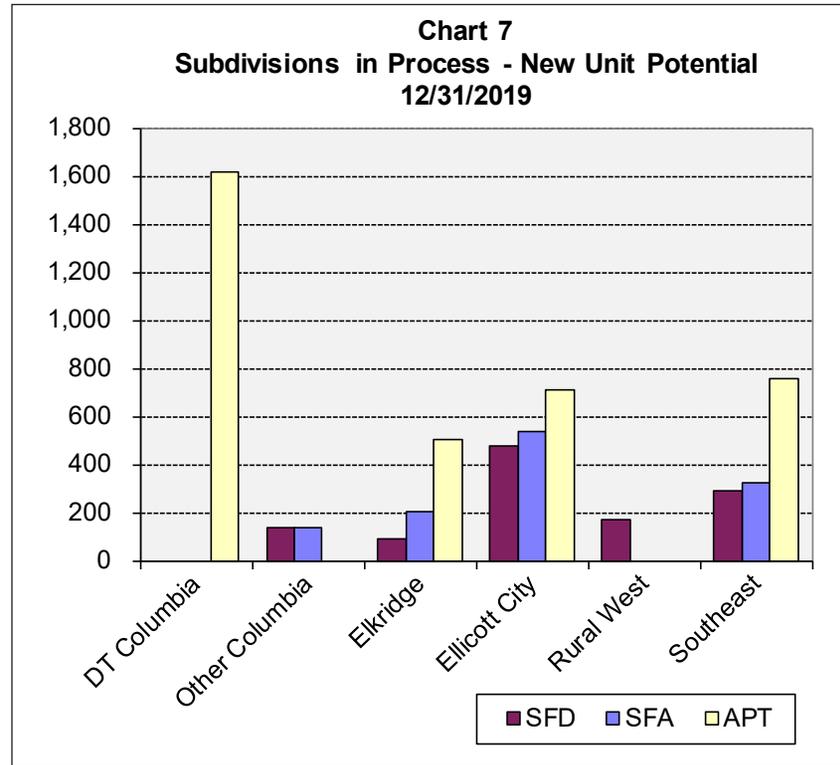


Table 13
Potential Units from Phased Projects in Process, 12/31/19

Planning Area	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	TOTAL
Downtown Columbia	0	0	0	175	400	270	313	458	0	0	1,616
All Other Columbia	0	50	50	50	34	0	0	0	0	0	184
Elkridge	35	75	75	75	75	60	0	0	0	0	395
Ellicott City	115	115	210	210	207	130	132	80	80	32	1,311
Southeast	0	250	300	300	80	50	82	50	50	44	1,206
Rural West	0	0	0	0	0	0	0	0	0	0	0
TOTAL	150	490	635	810	796	510	527	588	130	76	4,712

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, 12/31/19

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	4	0	0	0	4
Elkridge	0	122	348	0	470	34	0	0	0	34
Ellicott City	60	93	391	0	544	261	88	254	0	603
Rural West	0	0	0	0	0	43	0	0	0	43
Southeast	221	259	756	0	1,236	18	17	0	0	35
TOTAL	281	474	1,495	0	2,250	360	105	254	0	719

Planning Area	Preliminary					Final					TOTAL - 12/31/19				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	1,616	0	1,616	0	0	1,616	0	1,616
All Other Columbia	7	15	0	0	22	131	123	0	0	254	142	138	0	0	280
Elkridge	28	30	159	0	217	32	52	0	0	84	94	204	507	0	805
Ellicott City	6	220	67	0	293	151	134	0	0	285	478	535	712	0	1,725
Rural West	0	0	0	0	0	130	0	0	0	130	173	0	0	0	173
Southeast	0	0	0	0	0	53	52	0	0	105	292	328	756	0	1,376
TOTAL	41	265	226	0	532	497	361	1,616	0	2,474	1,179	1,205	3,591	0	5,975

Number of Acres

As of December 31, 2019, a total of 1,949 acres of residential land were in the subdivision process. This is 436 less acres compared to the previous year, at which time there were 2,285 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 4 shows the location of these projects. The larger projects in this list include the Crescent and Lakefront neighborhoods, Cedar Creek (formerly known as Simpson Oaks), Dorsey Center, Elkridge Crossing II, Turf Valley, Taylor Highlands, Westmount, Laurel Park Station and the Milk Producers property. These major projects with 40 or more units total 5,341 units which account for about 89% of the total 5,975 units in the subdivision process.

Table 15
Acreege of Residential Subdivision Plans in Process, 12/31/19
(With comparisons to Countywide total as of 12/31/18)

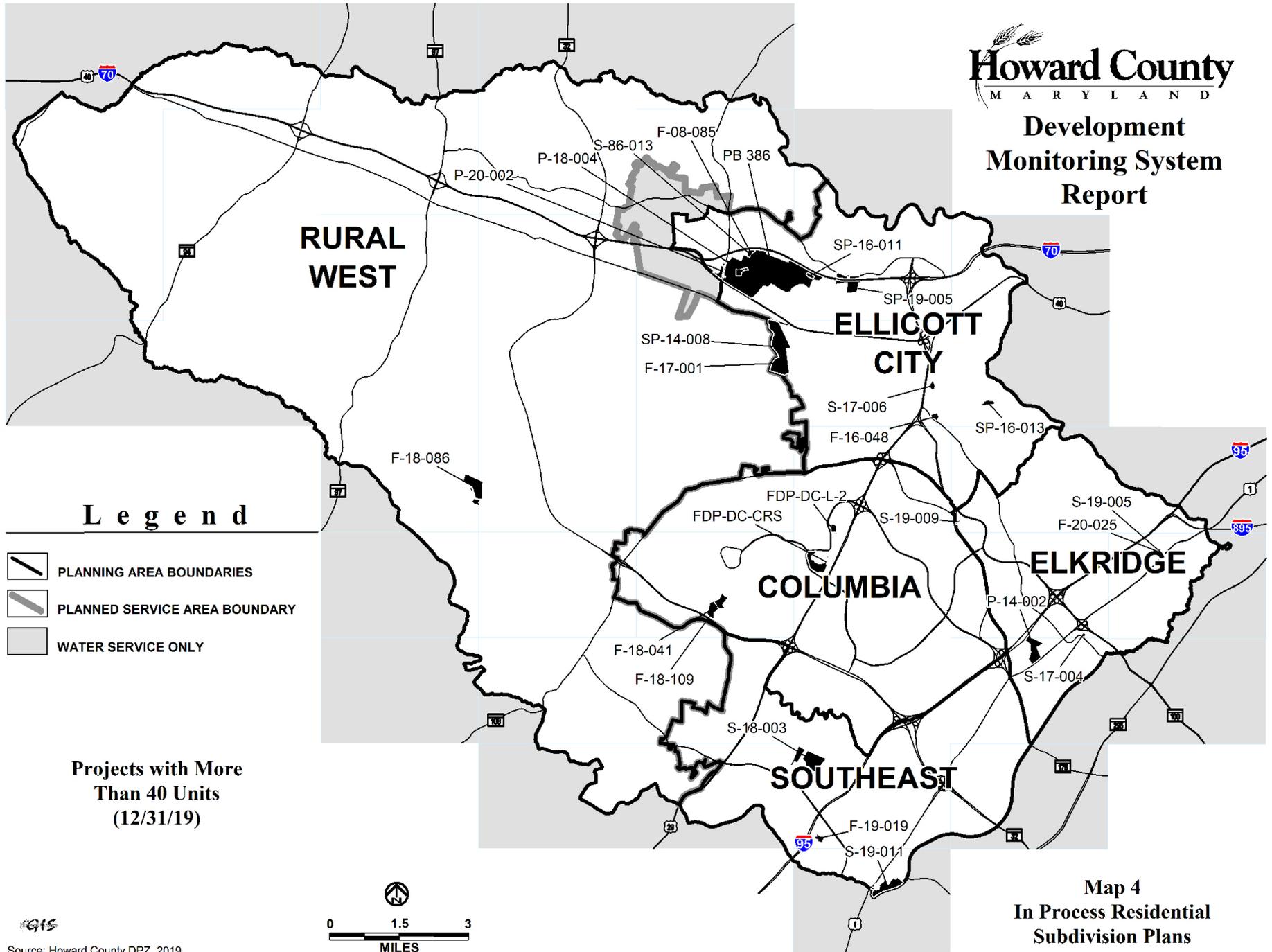
Planning Area	Preliminary Equivalent				TOTAL ADRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	82	82
All Other Columbia	0	2	5	101	107
Elkridge	20	18	90	60	188
Ellicott City	41	238	44	244	567
Rural West	0	128	0	649	777
Southeast	178	8	0	43	229
TOTAL	239	393	139	1,178	1,949
As of 12/31/18	275	378	49	1,683	2,385

Table 16
In-Process Residential Subdivision Plans, Projects With 40 Units or More, 12/31/19

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	FDP-DC-CRSCNT-1	Downtown Columbia - Crescent	APT - 67 MIHU	841	1,616
	FDP-DC-L-2	Downtown Columbia - Lakefront North	APT, APT - Age Restricted - 62 MIHU	775	
All Other Columbia	F-18-041, F-18-109	Cedar Creek (Simpson Oaks) - Phases 1 & 2	SFD, SFA	184	184
Elkridge	S-17-004	Dorsey Center	APT- 23 MIHU	230	695
	S-19-005, F-20-025	Elkridge Crossing II	APT, SFA - 36 MIHU	206	
	P-14-002	Blue Stream	APT, SFA - 35 MIHU	189	
	S-19-009	Ellicott Gardens II	APT - 7 MIHU	70	
Ellicott City	S-86-013, PB 386	Turf Valley - Remaining Phases	SFD, SFA, APT	469	1,573
	SP-16-013	Taylor Highlands - Phase 1	SFA, APT - 26 MIHU	252	
	F-17-001, SP-14-008	Westmount - Remaining Phases	SFD	193	
	P-18-004	The Village at Town Square (in Turf Valley)	SFA, APT	153	
	P-20-002	Chapelgate Woods	SFA - 14 MIHU	134	
	SP-19-005	Bethany Glen	SFD	111	
	SP-16-011	Ravenwood at Turf Valley	APT	90	
	F-16-048	Long Gate Overlook	SFA - 5 MIHU	79	
	S-17-006	Dorsey's Ridge	SFA, APT - 6 MIHU	52	
	F-08-085	Villages at Turf Valley - Phase 3	SFA	40	
Rural West	F-18-086	Willowshire	SFD	43	43
Southeast	S-19-011	Laurel Park Station - Phases 2 thru 4	APT - 116 MIHU	780	1,230
	S-18-003	Milk Producers	SFD, SFA - 40 MIHU	394	
	F-19-019	Magnolia Manor	SFD, SFA - 6 MIHU	56	
TOTAL					5,341



Development Monitoring System Report



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- PLANNING AREA BOUNDARIES
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Projects with More Than 40 Units (12/31/19)



Map 4
In Process Residential Subdivision Plans



Source: Howard County DPZ, 2019.

Approved Residential Site Development Plans

The site development plan (SDP) process is typically the next development stage after lots are recorded. Once a SDP has received signature approval, building permits can be issued after which actual land development can begin. SDP signature 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 2019 there were 1,333 housing units approved in 39 site development plans totaling 171 acres (Table 17). Elkridge had 444 approved units followed by Downtown Columbia with 436 units, Ellicott City with 218, the Southeast with 127, and all other Columbia with 106.

Table 18 shows new units from approved site development plans by unit type. Of the 1,333 approved units, 26% were for single family detached units, 34% were for single family attached units and 40% for apartment units (rental and condo). Chart 8 shows these results graphically.

Table 18
Approved Units in SDP's by Unit Type in 2019

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	436	0	436	33%
All Other Columbia	16	0	90	0	106	8%
Elkridge	63	379	2	0	444	33%
Ellicott City	141	77	0	0	218	16%
Rural West	2	0	0	0	2	0%
Southeast	127	0	0	0	127	10%
TOTAL	349	456	528	0	1,333	67%
PERCENT	26%	34%	40%	0%	100%	

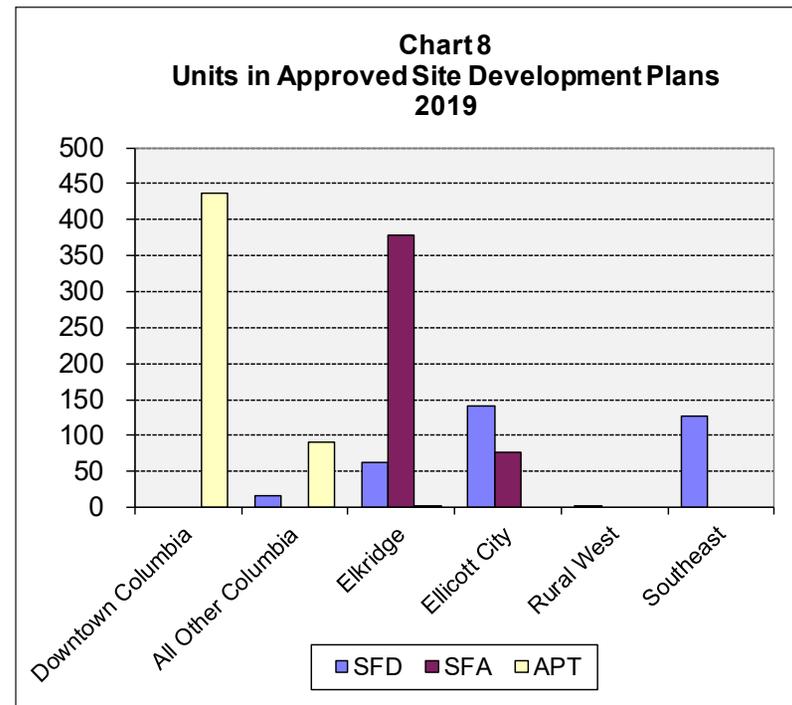


Table 17
Approved Residential Site Development Plans in 2019

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	436	33%	1	3%	21	12%
All Other Columbia	106	8%	4	10%	13	8%
Elkridge	444	33%	11	28%	55	32%
Ellicott City	218	16%	13	33%	54	32%
Rural West	2	0%	2	5%	3	2%
Southeast	127	10%	8	21%	25	15%
TOTAL	1,333	100%	39	100%	171	88%

Last Year's Projects - Greater than 20 Units

Of the total 1,333 units approved in site development plans last year, 1,225 or about 92% were in part of projects with more than 20 units. These larger projects, shown in Table 19, are located in four planning areas. The location of these plans are shown on Map 5.

Five Year Results

Tables 20 and 21 show the approved residential site development plans from January 1, 2015 to December 31, 2019. Over this five-year period 6,840 units were approved countywide in 203 site development plans totaling 1,149 acres.

Table 19
Approved Residential SDP's, Projects With More Than 20 Units in 2019

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-18-005	Crescent Neighborhood	APT - 28 MIHU	436	436
All Other Columbia	SDP-19-032	Brightview Columbia	APT-Age Restricted	90	90
Elkridge	SDP-18-022	Delacour at Blue Stream	SFA - 34 MIHU	180	413
	SDP-18-065	Trotters Knoll - Section 1	SFA - 8 MIHU	78	
	SDP-19-027	Riverwatch II	SFA, APT - 9 MIHU	58	
	SDP-18-019	Oxford Square	SFA - 9 MIHU	56	
	SDP-19-015	Elkridge Woods	SFD	41	
Ellicott City	SDP-19-056	Caperton Village at Turf Valley	SFD, SFA	80	174
	SDP-20-002	Park View at Turf Valley	SFD, SFA	55	
	SDP-19-044	Westmount - Phase 2	SFD	39	
Southeast	SDP-17-052	Maple Lawn South	SFD	112	112
TOTAL					1,225

Table 20
Approved Units in Residential Site Development Plans, 2015 to 2019

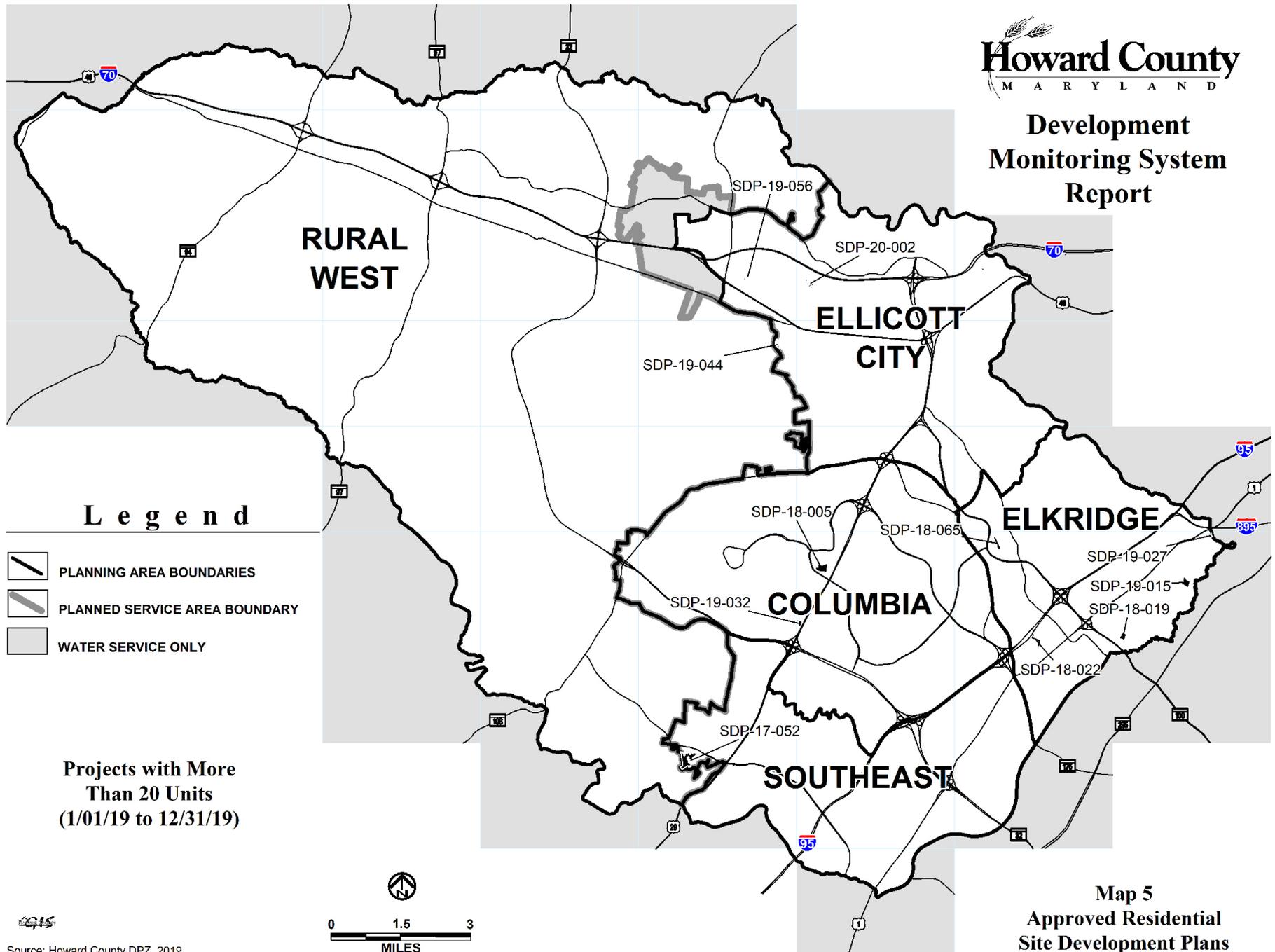
Year	SFD	SFA	APT	MH	Total
2015	402	444	806	0	1,652
2016	255	413	318	0	986
2017	371	322	655	0	1,348
2018	237	194	1,090	0	1,521
2019	349	456	528	0	1,333
TOTAL	1,614	1,829	3,397	0	6,840
PERCENT	24%	27%	50%	0%	100%
ANNUAL AVG.	323	366	679	0	1,368

Table 21
Approved Residential Site Development Plans, 2015 to 2019

Year	Units	Plans	Acreage
2015	1,652	46	207
2016	986	39	232
2017	1,348	39	324
2018	1,521	40	215
2019	1,333	39	171
TOTAL	6,840	203	1,149
ANNUAL AVG.	1,368	41	230



Development Monitoring System Report



Source: Howard County DPZ, 2019.

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, 2019, are tabulated and compared to those in process a year earlier (as of December 31, 2018). 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 the same number of residential site development plans in process as of December 31, 2019, compared to the prior reporting period in 2018, with 33 plans for each year (Table 22).

Table 22
Number of Residential SDP's In Process, 12/31/19 & 12/31/18

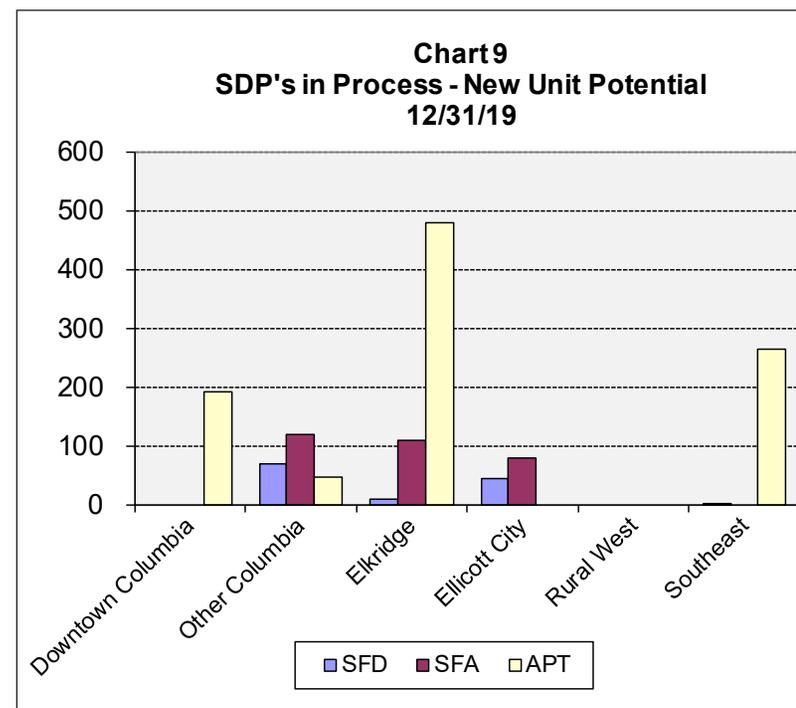
Planning Area	2019	2018
Downtown Columbia	1	2
All Other Columbia	7	4
Elkridge	12	11
Ellicott City	9	9
Rural West	1	1
Southeast	3	6
TOTAL	33	33

Number of Potential Units

There were 803 less units in process as of December 31, 2019, compared to December 31 of the previous year, 1,417 units compared to 2,220 units (Table 23). The greatest number of units in process are for apartments (including rental and condo) with 983 proposed units in 2019. This is followed by 307 proposed single family attached or townhouse units and 127 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, 12/31/19
(With comparisons to Countywide total as of 12/31/18)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
	Downtown Columbia	0	0	192	
All Other Columbia	69	119	48	0	236
Elkridge	11	109	479	0	599
Ellicott City	46	79	0	0	125
Rural West	0	0	0	0	0
Southeast	1	0	264	0	265
TOTAL	127	307	983	0	1,417
As of 12/31/18	156	468	1,596	0	2,220



Number of Acres

As of December 31, 2019, a total of 132 acres of residential land were in the site development plan process. This is 37 acres less than the previous year when there were 169 acres in process (Table 24).

Major Projects

Table 25 shows a list of potential units from larger projects with more than 20 units. Map 6 shows the location of these projects. Of the 1,417 units in the site development plan process, 1,328 or about 94% were in projects with more than 20 units.

These large projects include the Crescent Arts Center in Downtown Columbia; Cedar Creek Phase I, Robinson Overlook, and Eden Brook in Columbia; Oxford Square Bristol Court, Blue Stream 3, Elkridge Crossing II Section 1, and Potter's Place in Elkridge; Long Gate Overlook and Westmount Phase 2 in Ellicott City; and Laurel Park Station Phase 2 in the Southeast.

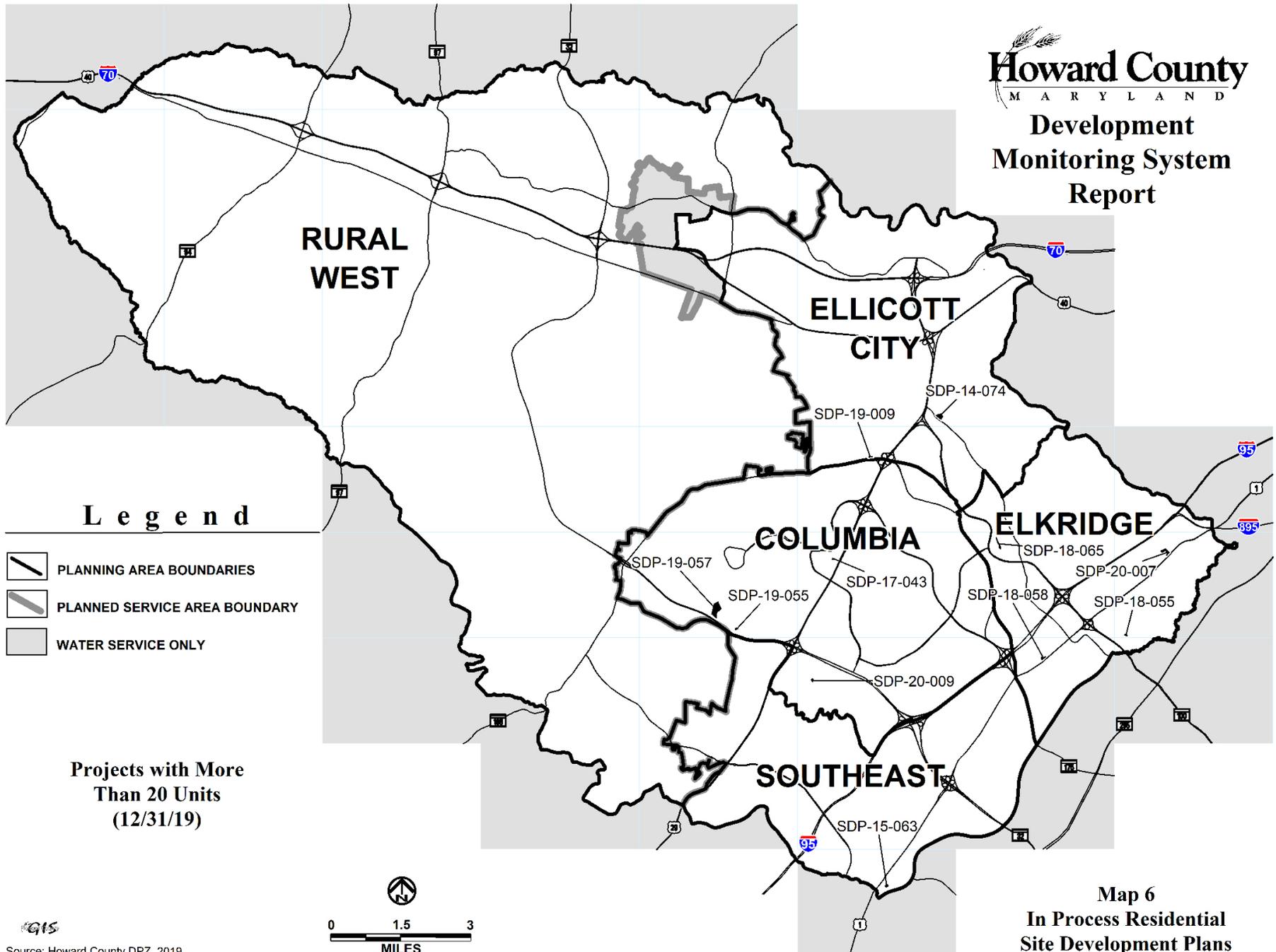
Table 24
Acreege of Residential SDP's In Process, 12/31/19 & 12/31/18

Planning Area	2019	2018
Downtown Columbia	3	24
All Other Columbia	32	13
Elkridge	42	60
Ellicott City	23	19
Rural West	25	25
Southeast	8	28
TOTAL	132	169

Table 25
In Process Residential Site Development Plans, Projects With More Than 20 Units, 12/31/19

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-17-043	Crescent Arts Center	APT - 96 MIHU	192	192
Remaining Columbia	SDP-19-057	Cedar Creek - Phase 1	SFD, SFA - 19 MIHU	122	194
	SDP-19-055	Robinson Overlook	APT - 5 MIHU	48	
	SDP-20-009	Eden Brook	SFA - Age-Restricted	24	
Elkridge	SDP-18-055	Oxford Square - Bristol Court	APT - 48 MIHU	318	569
	SDP-18-058	Blue Stream 3	SFA, APT - 35 MIHU	189	
	SDP-20-007	Elkridge Crossing II, Section 1	SFA - 5 MIHU	36	
	SDP-18-065	Potter's Place	SFA - 3 MIHU	26	
Ellicott City	SDP-14-074	Long Gate Overlook	SFA - 5 MIHU	79	113
	SDP-19-009	Westmount - Phase 2	SFD	34	
Southeast	SDP-15-063	Laurel Park Station - Phase 2	APT - 39 MIHU	260	260
TOTAL					1,328

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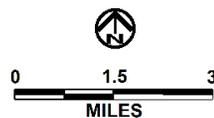


Legend

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

**Projects with More
 Than 20 Units
 (12/31/19)**

GIS
 Source: Howard County DPZ, 2019.



**Map 6
 In Process Residential
 Site Development Plans**

Residential Building Permits & Use and Occupancy Permits

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

Issued Building Permits

Summary of Last Year

From January 1, 2019, to December 31, 2019, the County issued 895 residential building permits for new construction (Table 26). Elkridge had the greatest number issued with 346, followed by Ellicott City with 198 and then Columbia with 146. Countywide, 47% of the permits were for single family detached units. About 41% were for single family attached units and 12% for apartment units (both rental and condo). Chart 10 shows these results graphically by planning area.

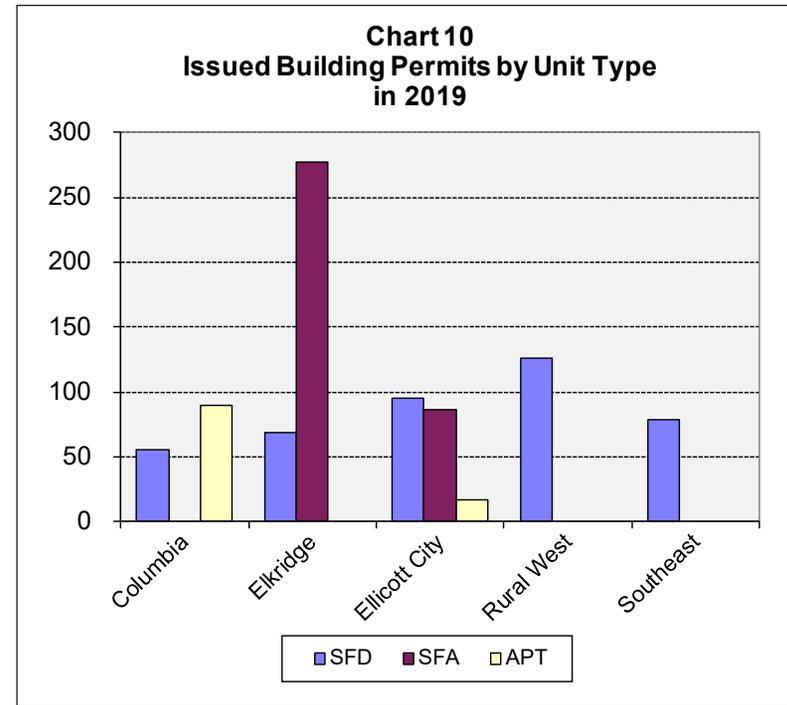


Table 26
Issued Residential Building Permits by Unit Type in 2019

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	56	0	90	0	146	16%
Elkridge	69	277	0	0	346	39%
Ellicott City	95	86	17	0	198	22%
Rural West	126	0	0	0	126	14%
Southeast	79	0	0	0	79	9%
TOTAL	425	363	107	0	895	100%
PERCENT	47%	41%	12%	0%	100%	

Last Year's Projects - More Than 15 Units

Table 27 summarizes the issued residential building permits in larger developments with more than 15 units. About 69%, or 619 of the total 895 permits issued last year, fall into this category. Map 7 shows the locations of each of the developments.

Five Year Results

Over five years, from 2015 to 2019, a total of 8,289 residential permits have been issued in Howard County (Table 28). This is an average of 1,658 permits per year. Last year's 895 issued permits was 58% less than the 2,114 permits issued the year before and the lowest since at least 1979, the earliest year when tracking data are available.

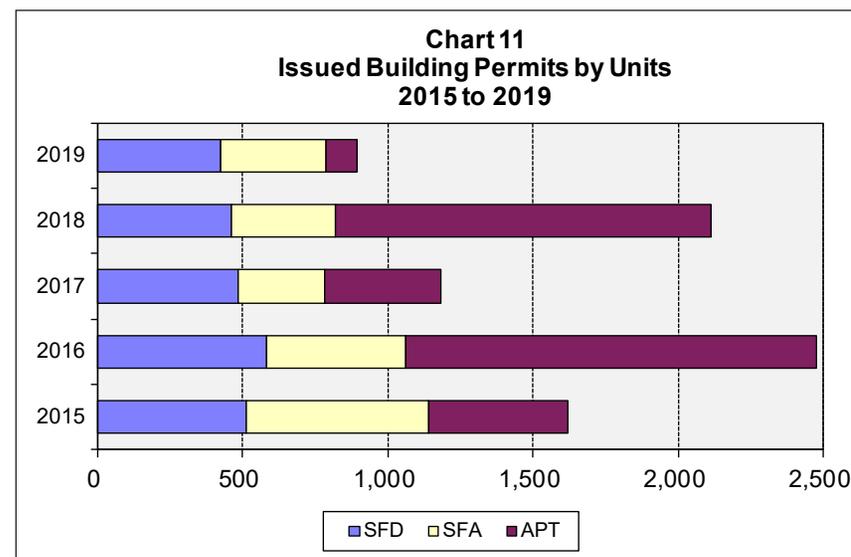
Of the 8,289 total permits issued over the five-year time period, 2,469, or 30%, were for single family detached units. There were 2,124 permits (26%) for single family attached units and 3,696 permits (45%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

Table 27
Issued Residential Building Permits, Subdivisions With 15 or More Units in 2019

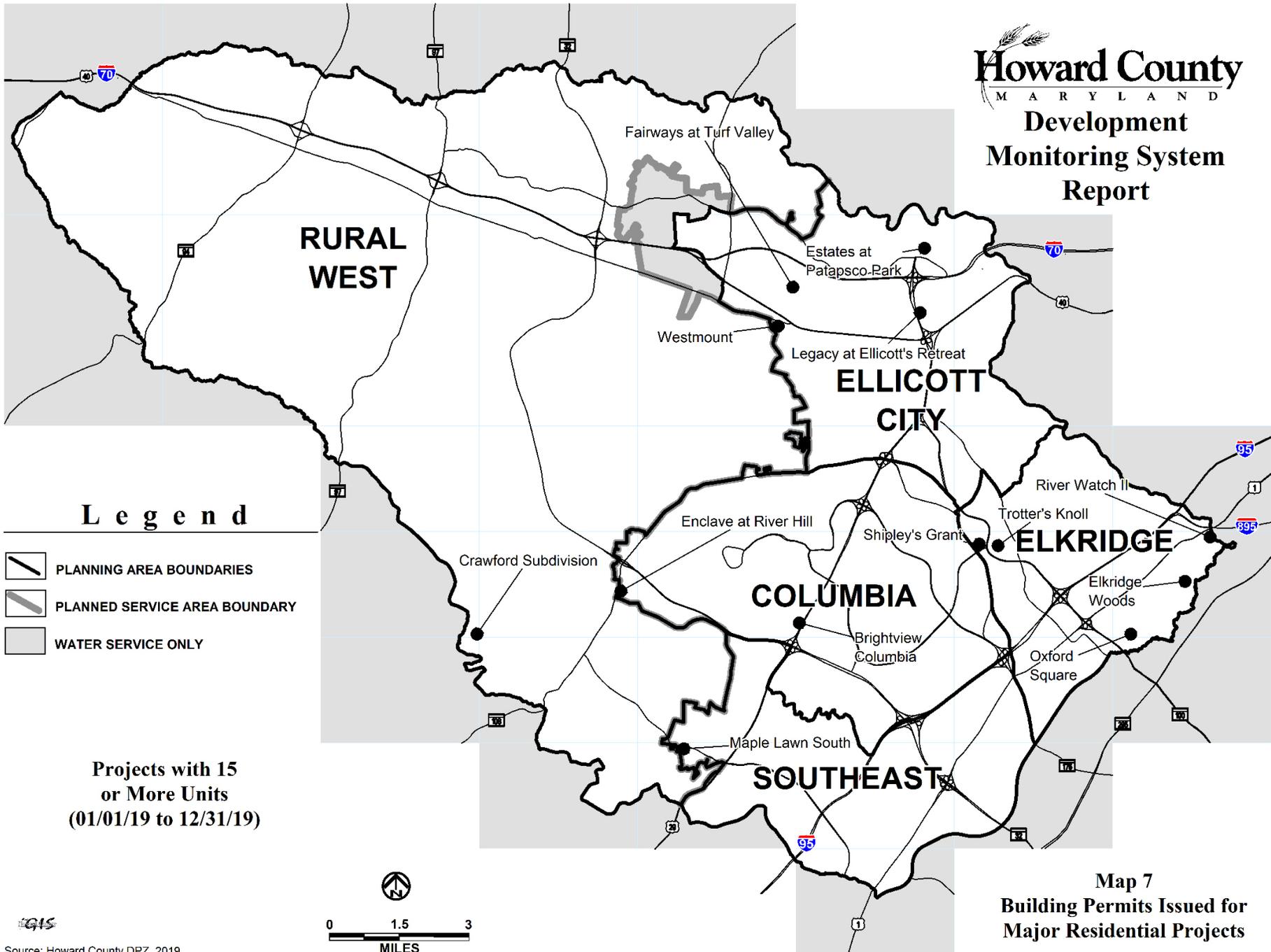
Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Brightview Columbia	Age-Restricted Apartments	90	136
	Enclave at River Hill	Single-Family Detached	46	
Elkridge	Oxford Square	Townhomes	128	279
	Riverwatch II	Townhomes	58	
	Trotter's Knoll	Townhomes	57	
	Elkridge Woods	Single-Family Detached	19	
	Shipley's Grant	Townhomes	17	
Ellicott City	Fairways at Turf Valley	Townhomes	56	148
	Estates at Patapsco Park	Single-Family Detached	41	
	Westmount	Single-Family Detached	35	
	Legacy at Ellicott's Retreat	Age-Restricted Apartments	16	
Southeast	Maple Lawn South	Single-Family Detached	37	37
Rural West	Crawford Subdivision	Single-Family Detached	19	19
TOTAL				619

Table 28
Issued Residential Building Permits by Unit Type, 2015 to 2109

Year	SFD	SFA	APT	MH	Total
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
2019	425	363	107	0	895
TOTAL	2,469	2,124	3,696	0	8,289
PERCENT	30%	26%	45%	0.0%	100%
ANNUAL AVG.	494	425	739	0	1,658



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Source: Howard County DPZ, 2019.

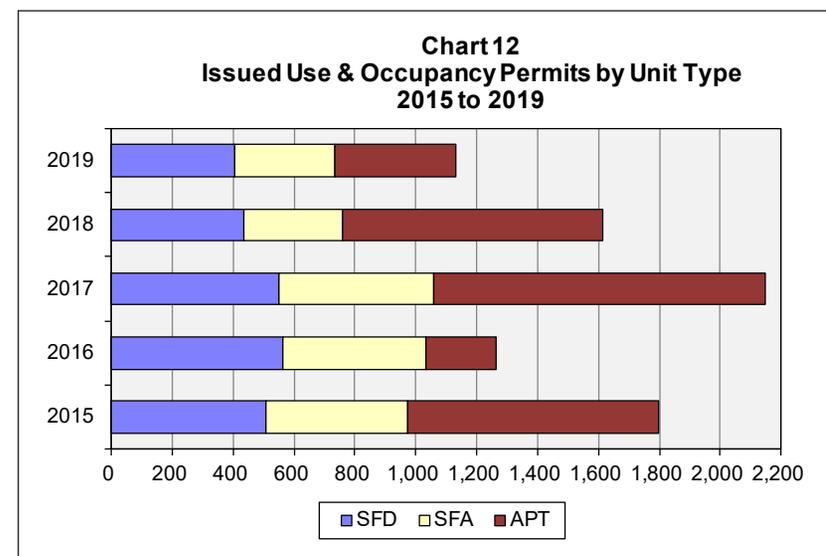
Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2019, to December 31, 2019, the County issued 1,131 use and occupancy permits (Table 29). Of all planning areas, Elkridge had the most with 612. This is followed by Ellicott City with 254, The Rural West with 115, the Southeast with 93, and Columbia with 57. Countywide, 36% of the permits were for single family detached units, 29% were for single family attached units and 35% were for apartment units (both rental and condo).

Table 29
Issued Use and Occupancy Permits by Unit Type in 2019

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	56	1	0	0	57	5%
Elkridge	41	223	348	0	612	54%
Ellicott City	110	96	48	0	254	22%
Rural West	115	0	0	0	115	10%
Southeast	83	10	0	0	93	8%
TOTAL	405	330	396	0	1,131	100%
PERCENT	36%	29%	35%	0%	100%	



Five Year Results

From 2015 to 2019, a total of 7,951 use and occupancy permits were issued in Howard County (Table 30). This is an annual average of 1,590 permits per year.

Of the 7,951 total use and occupancy permits issued over the five-year timeframe, 31% were for single family detached units, 26% for single family attached units, and 43% for apartment units (both rental and condo). There were 30% less units built last year compared to the year before, 1,131 completions in 2019 compared to 1,612 in 2018. Chart 12 shows the results by unit type graphically over time.

Table 30
Issued Use and Occupancy Permits by Unit Type, 2015 to 2019

Year	SFD	SFA	APT	MH	Total
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
2019	405	330	396	0	1,131
TOTAL	2,460	2,100	3,391	0	7,951
PERCENT	31%	26%	43%	0%	100%
ANNUAL AVG.	492	420	678	0	1,590

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, 2019, to December 31, 2019, 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, 2019. This includes both subdivision and site development plans. During this latest time period there were 149 age-restricted units in process. These units are from two projects in the Columbia planning area, Lakefront North (125 apartment units) and Eden Brook (24 townhomes). Last year in 2018 there were 114 age-restricted apartment units in process. Map 8 shows these 2019 projects.

Table 31
Age-Restricted Units from Plans in Process, 12/31/2019
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	125	125	84%
All Other Columbia	0	24	0	24	16%
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	125	149	16%
PERCENT	0%	16%	84%	100%	
As of 12/31/18	0	24	90	114	

Table 32 shows the total MIHU units in process. These total 626, the greatest number of which are in Downtown Columbia. This is less than the number in process the previous year when there were 701 in process.

Table 32
MIHU Units from Plans in Process, 12/31/2019
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia *	0	0	225	225	36%
All Other Columbia	0	23	5	28	4%
Elkridge	0	12	145	157	25%
Ellicott City	0	25	27	52	8%
Rural West	0	0	0	0	0%
Southeast	3	6	155	164	26%
TOTAL	3	66	557	626	64%
PERCENT	0%	11%	89%	100%	
As of 12/31/18	0	153	548	701	

* 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, 10 of the 626 MIHU units are age-restricted. There were 9 age-restricted MIHU units in process for the previous reporting period.

Map 9 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, 12/31/2019
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	10	10	100%
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	10	10	0%
PERCENT	0%	0%	100%	100%	

As of 12/31/18	0	0	9	9	
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Approved Site Development Plans

Table 34 shows the age-restricted units in site development plans that were approved between January 1, 2019, and December 31, 2019, with comparisons to the previous year. There were 90 units approved in 2019 and none approved in 2018. Map 8 shows these 2019 projects.

Table 35 shows the MIHU units in approved site development plans. A total of 88 units were approved, 60 in Elkridge and 28 in Downtown Columbia. None of these units are age-restricted—shown in Table 36. Map 9 shows the approved projects with MIHU units, and Table 38 shows the plan details.

Table 34
Age-Restricted Units from Approved Plans in 2019
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	90	90	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	90	90	0%
PERCENT	0%	0%	0%	0%	

Year 2018	0	0	0	0	
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Table 35
MIHU Units from Approved Plans in 2019
(with comparisons to the previous reporting period)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	28	28	32%
All Other Columbia	0	0	0	0	0%
Elkridge	0	60	0	60	68%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	60	28	88	68%
PERCENT	0%	68%	32%	100%	

Year 2018	0	24	112	136	
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Table 36
Age-Res. MIHU Units from Approved Plans in 2019
(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 2018	0	0	0	0	
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Table 37
In Process Plans With MIHU and Age-Restricted Units On December 31, 2019

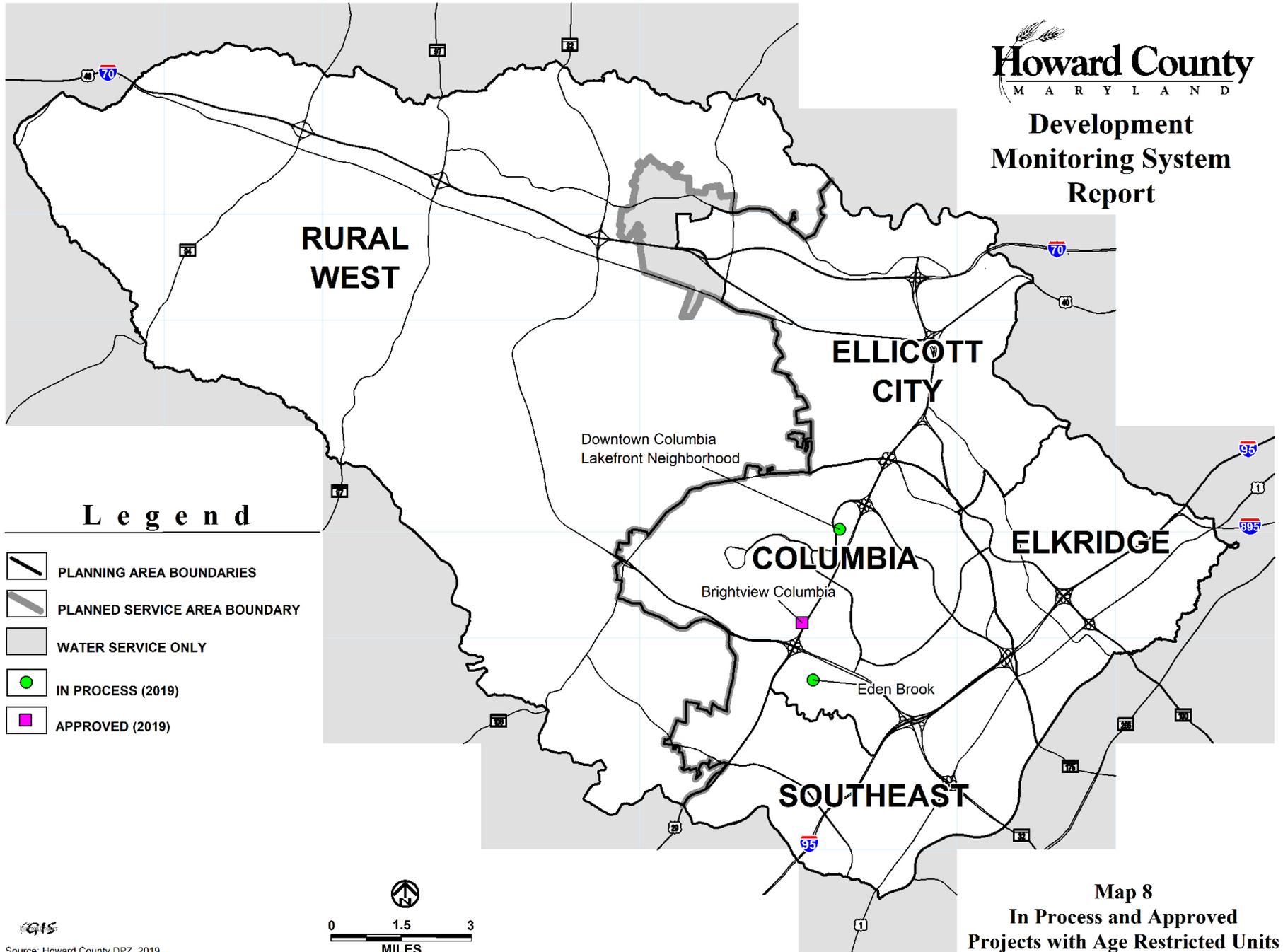
Plan Name	File Number	Zoning	MIHU Units											Market Rate				
			Not Age-Restricted				Age-Restricted				Total MIHU			Age-Restricted Units				
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Laurel Park Station - Phases 3 & 4	S-19-011	TOD	0	0	116	116	0	0	0	0	0	0	0	0	0	0	0	0
The Arts Center - DT Columbia	SDP-17-043	NT	0	0	96	96	0	0	0	0	0	0	0	0	0	0	0	0
The Crescent - DT Columbia	FDP-DC-CRSNT-1	NT	0	0	67	67	0	0	0	0	0	0	0	0	0	0	0	0
The Lakefront - DT Columbia	FDP-DC-L-2	NT	0	0	52	52	0	0	10	10	0	0	62	62	0	0	115	115
Oxford Square - Bristol Court	SDP-18-055	TOD	0	0	48	48	0	0	0	0	0	0	48	48	0	0	0	0
Laurel Park Station - Phase 2	SDP-15-063	TOD	0	0	39	39	0	0	0	0	0	0	39	39	0	0	0	0
Blue Stream 3 - Apts/Commercial	SDP-18-058	CAC	0	0	35	35	0	0	0	0	0	0	35	35	0	0	0	0
Elkridge Crossing II, Remaining Units	S-19-005	CAC-CLI	0	0	31	31	0	0	0	0	0	0	31	31	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
Cedar Creek - Phase 1	SDP-19-057	CEF	0	19	0	19	0	0	0	0	0	19	0	19	0	0	0	0
Chapelgate Woods	P-20-002	CEF	0	14	0	14	0	0	0	0	0	14	0	14	0	0	0	0
Ellicott Gardens II	S-19-009	POR	0	0	7	7	0	0	0	0	0	0	7	7	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	F-19-019	R-SC	0	6	0	6	0	0	0	0	0	6	0	6	0	0	0	0
Elkridge Crossing II, Section 1	SDP-20-007	CAC-CLI	0	5	0	5	0	0	0	0	0	5	0	5	0	0	0	0
Robinson Overlook	SDP-19-055	POR	0	0	5	5	0	0	0	0	0	0	5	5	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
Greenwood Village - Phase 2	F-19-052	R-12	3	0	0	3	0	0	0	0	3	0	0	3	0	0	0	0
Buch Property	SDP-12-001	CAC-CLI	0	2	1	3	0	0	0	0	0	2	1	3	0	0	0	0
Potter's Place	SDP-20-004	R-A-15	0	3	0	3	0	0	0	0	0	3	0	3	0	0	0	0
Glen Oaks Place	P-20-005	R-SA-8	0	2	0	2	0	0	0	0	0	2	0	2	0	0	0	0
Hidden Ridge	SDP-19-065	R-12	0	2	0	2	0	0	0	0	0	2	0	2	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
Eden Brook	SDP-20-009	R-12	0	0	0	0	0	0	0	0	0	0	0	0	24	0	24	
TOTAL			3	66	547	616	0	0	10	10	3	66	557	626	0	24	115	139

Table 38
Approved Subdivisions & SDP's with MIHU and Age-Restricted Units in 2019

Plan Name	File Number	Zoning	MIHU Units											Market Rate				
			Not Age-Restricted				Age-Restricted				Total MIHU			Age-Restricted Units				
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Delacour at Blue Stream	SDP-18-022	CAC	0	34	0	34	0	0	0	0	0	34	0	34	0	0	0	0
The Crescent - DT Columbia	SDP-18-005	NT	0	0	28	28	0	0	0	0	0	0	28	28	0	0	0	0
River Watch 2	SDP-19-027	CAC	0	9	0	9	0	0	0	0	0	9	0	9	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
Trotter's Knoll, Section 1	SDP-18-065	R-SA-8	0	8	0	8	0	0	0	0	0	8	0	8	0	0	0	0
Brightview Columbia	SDP-19-032	CEF	0	0	0	0	0	0	0	0	0	0	0	0	0	90	90	
TOTAL			0	60	28	88	0	0	0	0	0	60	28	88	0	0	90	90

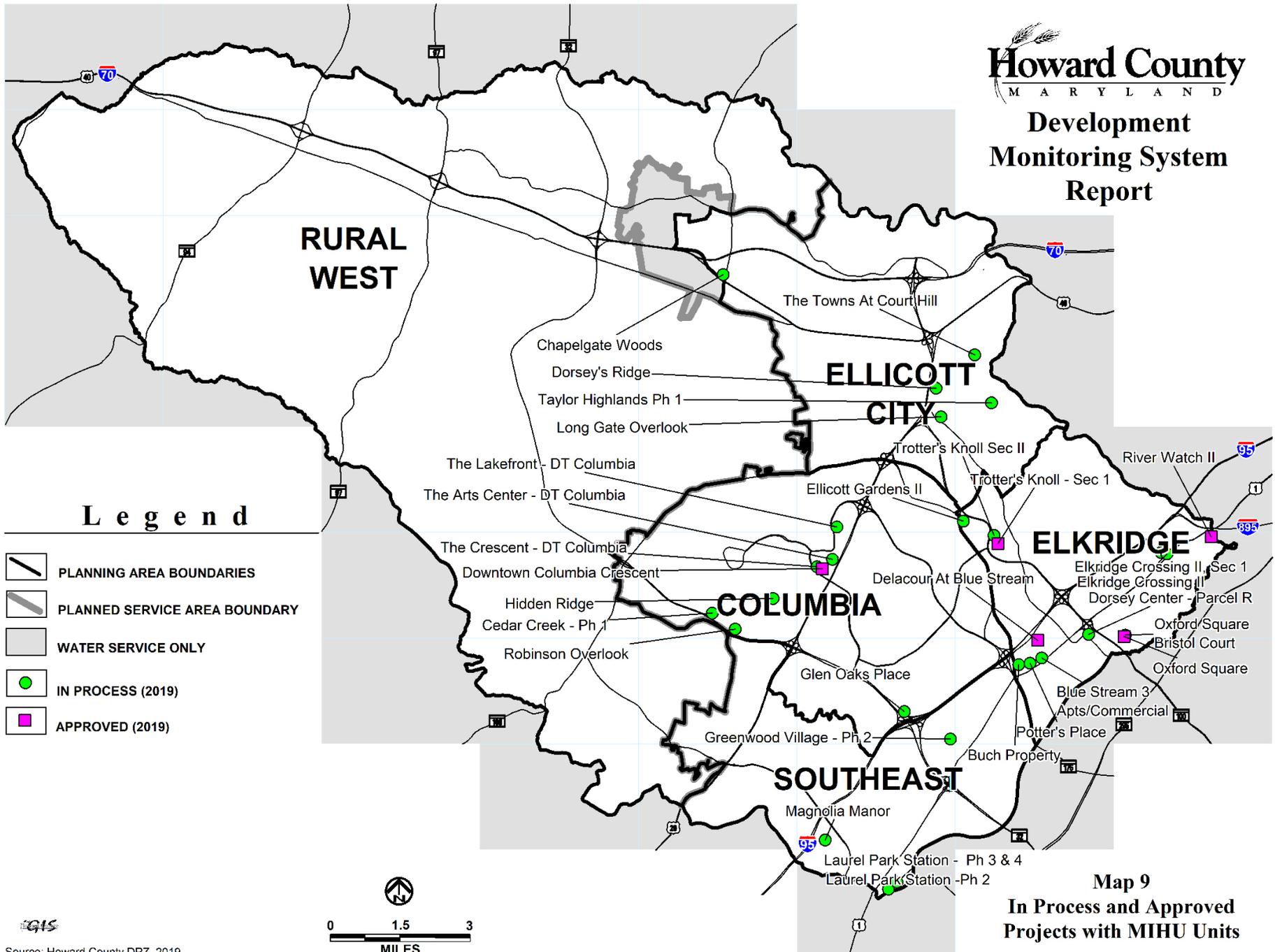


Development Monitoring System Report



Source: Howard County DPZ, 2019.

**Development
Monitoring System
Report**



Source: Howard County DPZ, 2019.

Use & Occupancy Permits

Table 39 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2019, and December 31, 2019, 70 age-restricted units were built, 6% of the total 1,131 housing units built in the County over this latest reporting period.

There were 13 less age-restricted units built in the current reporting period compared to the previous period when there were 83 units built. The 2019 annual amount of 70 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, 16% 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 2019
(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	1	11	48	60	86%
Rural West	0	0	0	0	0%
Southeast	0	10	0	10	14%
TOTAL	1	21	48	70	100%
PERCENT	1%	30%	69%	100%	

Year 2018	SFD	SFA	APT	TOTAL
	0	35	48	83

Table 40
Age-Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/19

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%
01/19 to 12/19	1	21	48	70	1,131	6%
TOTAL	359	1,323	2,106	3,788	23,082	16%
PERCENT	9%	35%	56%	100%		

* Extra quarter included due to change in analysis timeframe.

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 15 non-residential subdivision plans were recorded totaling 166 acres (Table 41). 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 41
Recorded Non-Residential Subdivisions in 2019

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	3	20%	6	3%
All Other Columbia	0	0%	4	27%	48	29%
Elkridge	0	0%	1	7%	7	4%
Ellicott City	0	0%	2	13%	12	7%
Rural West	0	0%	1	7%	1	0%
Southeast	4	100%	4	27%	93	56%
TOTAL	4	100%	15	100%	166	100%

Table 42 shows the recorded non-residential subdivisions from January 1, 2015 to December 31, 2019. Over this five-year period there were 94 non-residential lots recorded countywide in 108 subdivision plans totaling 1,615 acres. This amounts to an annual average over the five-year analysis time period of 19 lots in 22 plans encompassing 323 acres.

Table 42
Recorded Non-Residential Subdivisions, 2015 to 2019

Countywide	Lots	Plans	Acreage
2015	12	18	231
2016	20	30	548
2017	(4)	24	348
2018	62	21	322
2019	4	15	166
TOTAL	94	108	1,615
ANNUAL AVG.	19	22	323

In-Process Plans

Countywide, there were 34 non-residential subdivision plans in process as of December 31, 2019. This compares to 26 plans in process for the previous reporting period (Table 43). Twelve plans were in Elkrigde, 8 plans in the Southeast, 6 plans in the Rural West, 4 plans in Columbia and 2 plans each in Downtown Columbia and Ellicott City. Most of the plans were in the final plan or environmental concept plan stage.

Table 44 shows the number of potential non-residential lots in process. As of December 31, 2019, there were 11 lots in process, compared to 3 in process on December 31, 2018. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There was a total of 482 non-residential acres in the subdivision process as of December 31, 2019 (Table 45). This compares to 205 acres in process one year earlier. For the current year the greatest acreage amount is in the Southeast (245 acres). This is followed by 133 acres in Elkrigde, 47 acres in Columbia, 24 acres in Ellicott City, 17 acres in the Rural West, and 16 acres in Downtown Columbia.

Table 43
Number of Non-Residential Plans in Process, 12/31/19
with Comparisons to 12/31/2018 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	0	0	2	2
All Other Columbia	2	0	0	0	2	4
Elkrigde	6	1	0	0	5	12
Ellicott City	1	0	0	0	1	2
Rural West	4	0	0	0	2	6
Southeast	3	1	0	0	4	8
TOTAL	16	2	0	0	16	34
12/31/18 Total	16	1	0	0	9	26

Table 44
Non-Residential Lots from Subdivision Plans in Process, 12/31/2019
with Comparisons to 12/31/2018 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	2	2
All Other Columbia	0	0	0	2	2
Elkrigde	2	0	0	0	2
Ellicott City	0	0	0	0	0
Rural West	0	0	0	4	4
Southeast	0	0	0	1	1
TOTAL	2	0	0	9	11
12/31/18 Total	0	0	0	3	3

Table 45
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2019
with Comparisons to 12/31/2018 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	16	16
All Other Columbia	0	0	0	47	47
Elkrigde	13	0	0	119	133
Ellicott City	0	0	0	24	24
Rural West	0	0	0	17	17
Southeast	63	0	0	181	245
TOTAL	77	0	0	405	482
12/31/18 Total	63	0	0	141	205

Approved Non-Residential Site Development Plans

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

Summary of Last Year

For the latest reporting period close to 740,000 square feet were approved in 18 site development plans on 123 acres (Table 46). The greatest amount of square footage approved was in Columbia, followed by the Southeast, Downtown Columbia, Elkridge, and Ellicott City.

Table 47 shows the approved square footage by building type. About 373,000 square feet, 50% of the total, are for government and institutional uses, most all of which are in Columbia with lesser amounts in the Southeast. About 132,000 square feet, 18% of the total, are for retail uses. Office/service uses totalled 105,000 square feet, most of which are in the Southeast. Manufacturing/extensive industrial uses, all in Columbia, total 119,000 square feet, 16% of the total. Other uses account for the remaining 10,000 square feet, about 1% of the total. Chart 13 shows this graphically.

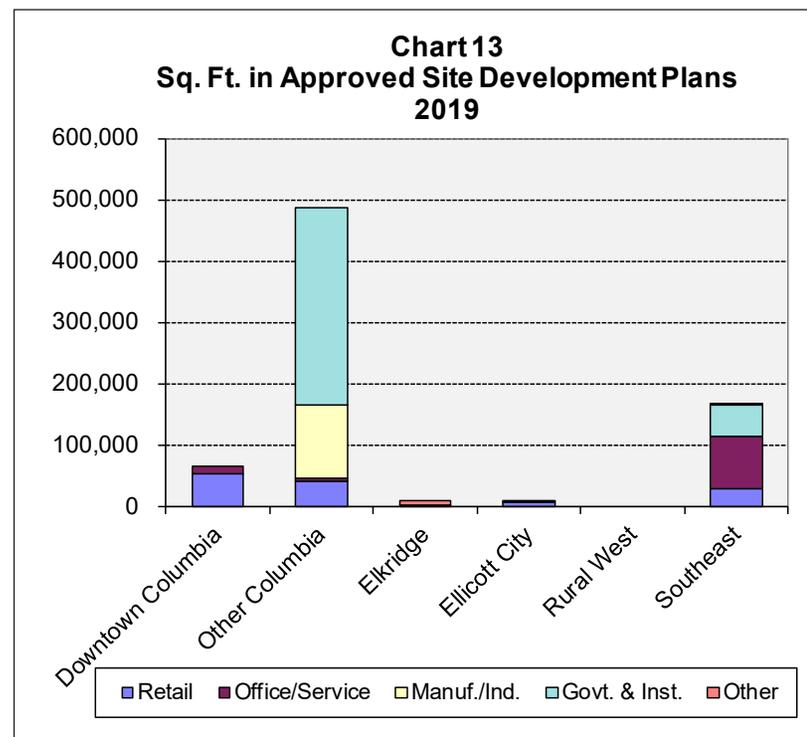
Table 47
Building Square Feet in Approved Non-Residential Site Development Plans in 2019

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	54,376	11,150	0	0	0	65,526
All Other Columbia	42,214	3,930	118,549	323,164	0	487,857
Elkridge	0	3,839	0	0	7,090	10,929
Ellicott City	7,000	0	0	182	0	7,182
Rural West	0	0	0	0	0	0
Southeast	28,855	86,565	0	49,998	2,690	168,108
TOTAL	132,445	105,484	118,549	373,344	9,780	739,602
PERCENT	17.9%	14.3%	16.0%	50.5%	1.3%	100.0%

Table 46
Approved Non-Residential Site Development Plans in 2019

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	65,526	9%	2	11%	22	18%
All Other Columbia	487,857	66%	6	33%	40	33%
Elkridge	10,929	1%	3	17%	18	15%
Ellicott City	7,182	1%	2	11%	1	1%
Rural West	0	0%	2	11%	34	28%
Southeast	168,108	23%	3	17%	7	6%
TOTAL	739,602	91%	18	100%	123	82%

Chart 13
Sq. Ft. in Approved Site Development Plans 2019



Last Year's Projects - Greater than 40,000 Square Feet

Of the close to 740,000 square feet of non-residential building space approved in site development plans last year, most all were in plans with more than 40,000 square feet. These larger plans are shown in Table 48. The locations of these plans are shown on Map 10.

In Downtown Columbia, 65,500 square feet of new retail and office space were approved in the Crescent Neighborhood. (Please refer to the 2018 Downtown Columbia Monitoring Report for further details on new and planned development in Downtown Columbia.) In Columbia, a new 233,000 square foot Howard County Circuit Courthouse was approved. Three other large buildings were also approved in Columbia – a new self-

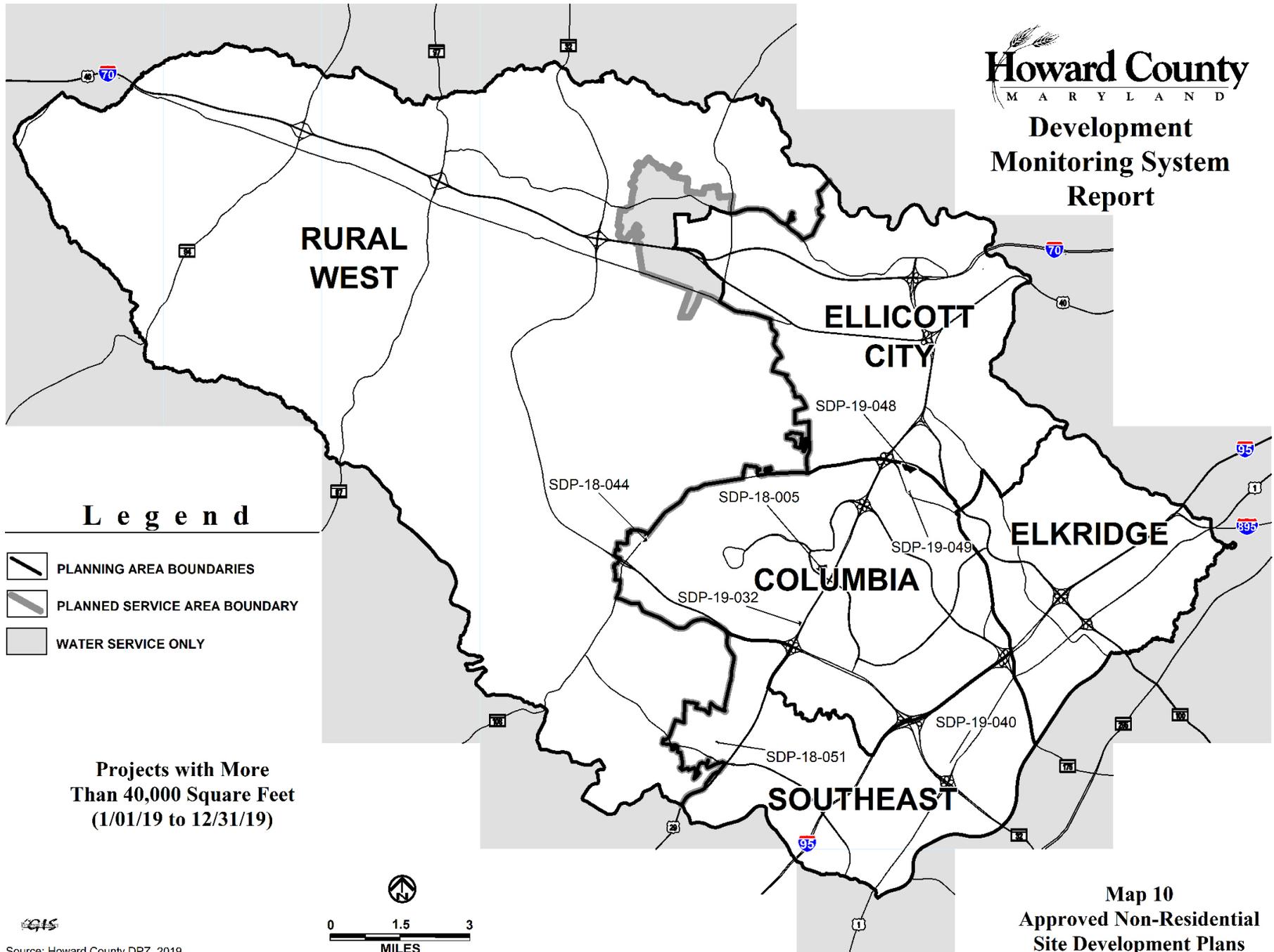
storage building on Red Branch Road, a new nursing home as part of the Brightview Columbia development, and retail and service space as part of River Hill Square. There were two larger plans approved in the Southeast – a new 115,000 office and retail building in Maple Lawn Farms and the new 50,000 square foot Guilford Assisted Living facility.

Table 48
Projects With More Than 40,000 Square Feet in Approved Non-Residential Site Development Plans in 2019

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-18-005	Crescent Neighborhood	Retail and Office	65,526	65,526
Columbia	SDP-19-048	Howard County Circuit Courthouse	Government	233,265	481,866
	SDP-19-049	9199 Red Branch Road	Self-Storage Building	118,549	
	SDP-19-032	Brightview Columbia	Nursing Home	89,899	
	SDP-18-044	River Hill Square	Retail and Service	40,153	
Southeast	SDP-18-051	Maple Lawn Farms	Retail and Office	115,420	165,418
	SDP-19-040	Guilford Assisted Living	Nursing Home	49,998	
TOTAL					712,810



Development Monitoring System Report



Legend

- PLANNING AREA BOUNDARIES
PLANNED SERVICE AREA BOUNDARY
WATER SERVICE ONLY

Projects with More Than 40,000 Square Feet (1/01/19 to 12/31/19)

Map 10 Approved Non-Residential Site Development Plans

Source: Howard County DPZ, 2019.

Five Year Results

Table 49 shows the countywide approved non-residential site development plans for the last five reporting periods from January 1, 2015 to December 31, 2019. Over this timeframe there were 104 plans approved on 1,783 acres including about 4.7 million square feet of building space. This equates to an annual average of about 947,000 square feet of new building space approved per year.

Last year, with about 740,000 square feet of approved space, was less than the 1 million square feet approved the year before. Chart 14 depicts these annual amounts.

Table 50 shows the five-year history by building type. Over the five years, about 36% of the total 4.7 million square feet was for office/service space. About 27% was for manufacturing/extensive industrial space, 24% for government and institutional uses, 12% for retail uses and about 1% for other uses.

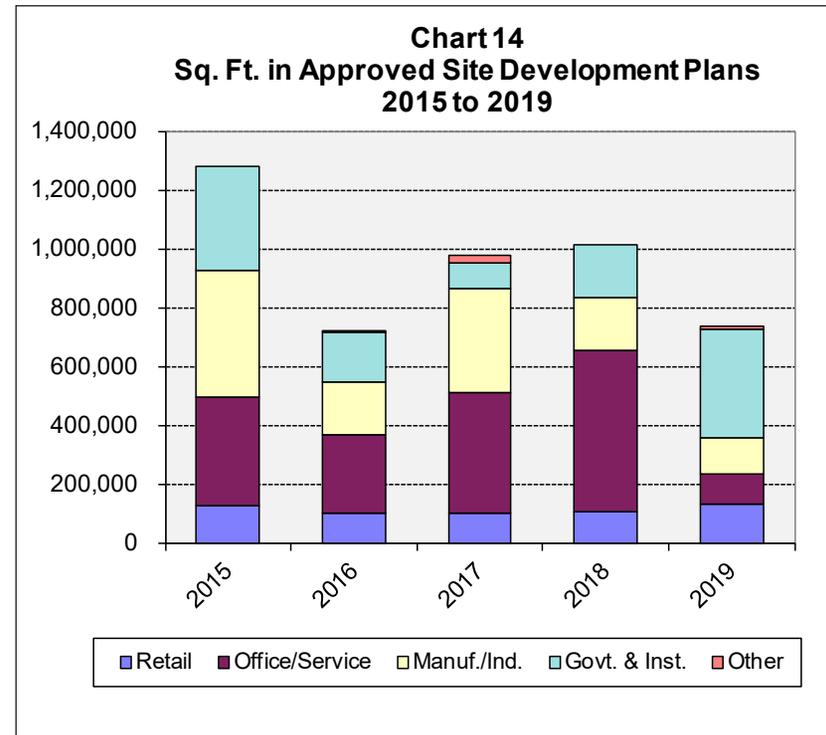


Table 49
Approved Non-Residential Site Development Plans
2015 to 2019

Year	Square Feet	Number or Plans	Acreage
2015	1,281,525	23	405
2016	721,415	19	154
2017	980,165	30	1,004
2018	1,013,502	14	97
2019	739,602	18	123
TOTAL	4,736,209	104	1,783
ANNUAL AVG.	947,242	21	357

Table 50
Building Square Feet in Approved Non-Residential Site Development Plans
2015 to 2019

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
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
2019	132,445	105,484	118,549	373,344	9,780	739,602
TOTAL	574,530	1,700,018	1,258,487	1,161,591	41,583	4,736,209
PERCENT	12.1%	35.9%	26.6%	24.5%	0.9%	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, 2019, are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 28 non-residential site development plans in process as of December 31, 2019. These plans include about 1.2 million square feet of building space covering 315 acres. This compares to 1.1 million square feet in 32 plans on 348 acres that were in process the previous year (on December 31, 2018).

As shown in Table 51, the Southeast had the most square footage in process, followed by Columbia and then Elkridge. Table 52 shows a more detailed breakdown of square footage by building type. About 483,000 square feet are for office/service uses, 451,000 square feet for government and institutional uses, 268,000 square feet for manufacturing/extensive industrial uses, and 26,000 square feet for retail uses.

Projects Greater than 15,000 Square Feet

Table 53 shows site development plans with buildings greater than 15,000 square feet. Map 11 shows the locations of these projects. These projects account for about 96% of the total 1.2 million square feet in process.

Table 51
In-Process Non-Residential Site Development Plans, 12/31/19
with Comparisons to Countywide In-Process on 12/31/18

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	115,692	9%	1	4%	3	1%
All Other Columbia	258,863	21%	4	14%	115	37%
Elkridge	253,265	21%	8	29%	35	11%
Ellicott City	2,666	0%	2	7%	3	1%
Rural West	24,932	2%	5	18%	51	16%
Southeast	571,835	47%	8	29%	108	34%
TOTAL	1,227,253	100%	28	100%	315	100%
12/31/2018	1,094,291		32		348	

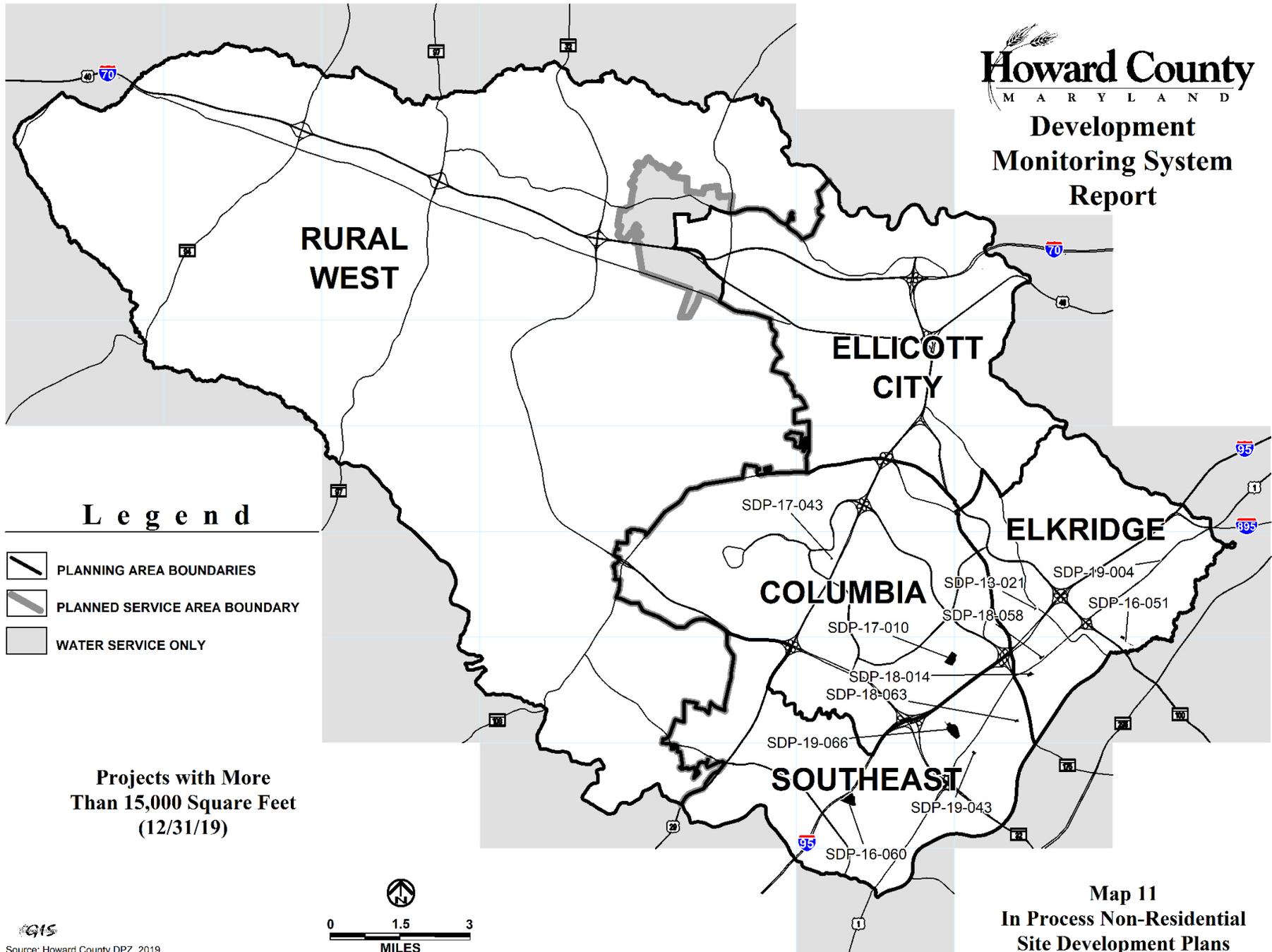
Table 52
Building Square Feet in In-Process Site Development Plans, 12/31/19
with Comparisons to Countywide In-Process on 12/31/18

Region	Building Type					TOTAL
	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	
Downtown Columbia	0	0	0	115,692	0	115,692
All Other Columbia	0	254,000	0	4,863	0	258,863
Elkridge	2,753	21,021	187,425	42,066	0	253,265
Ellicott City	2,666	0	0	0	0	2,666
Rural West	12,966	11,966	0	0	0	24,932
Southeast	7,268	195,876	80,691	288,000	0	571,835
TOTAL	25,653	482,863	268,116	450,621	0	1,227,253
PERCENT	2.1%	39.3%	21.8%	36.7%	0.0%	100.0%
12/31/2018	176,893	550,894	187,425	53,607	125,472	1,094,291

Table 53
Projects With More Than 15,000 Square Feet in In-Process Non-Residential Site Development Plans, 12/31/19

Region	File Number	Plan Name	Use	Building Area	TOTAL
Downtown Columbia	SDP-17-043	Crescent Neighborhood	Arts Center	115,692	115,692
Columbia	SDP-17-010	7125 Columbia Gateway Drive	Office Building	254,000	254,000
Elkridge	SDP-19-004	Cubsmart Storage	Self-Storage Facility	111,625	250,512
	SDP-16-051	Oxford Square	Self-Storage Facility	75,800	
	SDP-18-014	Waterloo Fire Station	Fire Station	23,357	
	SDP-18-058	Blue Stream	Office	21,021	
	SDP-13-021	Mayfield Logistics Facility	Government Facility	18,709	
Southeast	SDP-19-066	High School # 13	New High School	288,000	552,867
	SDP-16-060	Emerson Corporate Commons	Office Building	184,176	
	SDP-18-063	Maryland Food Center	Recycling Facility	42,360	
	SDP-19-043	8106 Stayton Drive	Warehouse	38,331	
TOTAL					1,173,071

Howard County
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GIS
 Source: Howard County DPZ, 2019.

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, 2019, to December 31, 2019, 50 permits were issued for about 956,000 square feet in non-residential building space (Table 54). The greatest amount of square footage was in Columbia, followed by the Southeast, and then Elkridge.

Table 54
Issued Non-Residential Building Permits in 2019

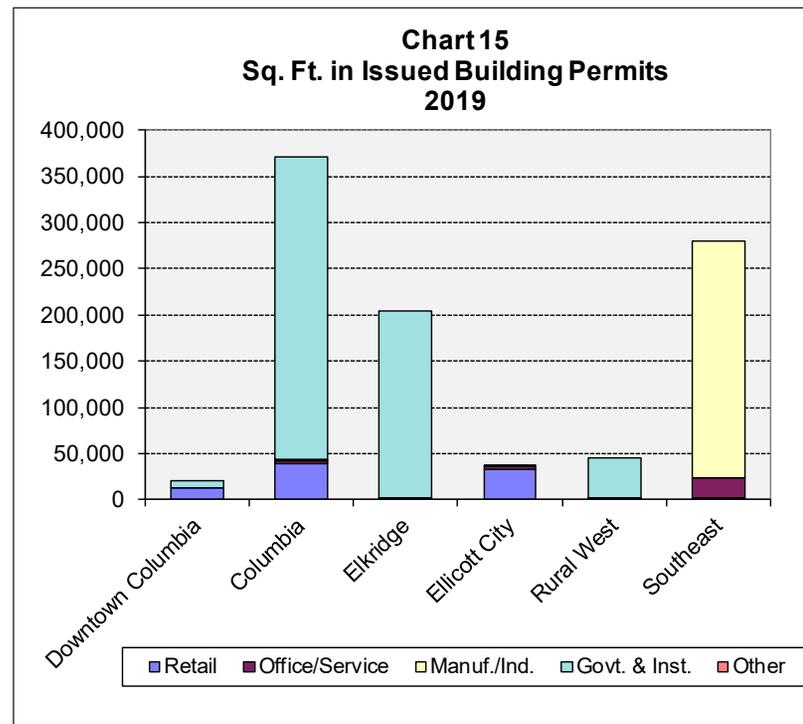
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	19,829	2%	6	12%
All Other Columbia	370,981	39%	14	28%
Elkridge	203,810	21%	5	10%
Ellicott City	35,862	4%	5	10%
Rural West	45,587	5%	6	12%
Southeast	279,582	29%	14	28%
TOTAL	955,651	100%	50	100%

Table 55 shows the approved square footage by building type. About 581,000 square feet, 61% of the total, are for government and institutional uses, the majority of which is in Columbia. Another 27%, about 260,000 square feet, are for manufacturing/extensive industrial uses. About 9% of the total, or 87,000 square feet, are for retail uses, and 29,000 square feet are for office/service uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 55
Building Square Feet in Issued Non-Residential Building Permits in 2019

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	12,716	0	0	7,113	0	19,829
All Other Columbia	39,112	3,265	875	327,729	0	370,981
Elkridge	0	1,005	1,228	201,577	0	203,810
Ellicott City	33,143	2,565	0	154	0	35,862
Rural West	72	0	1,200	44,315	0	45,587
Southeast	1,500	21,835	256,247	0	0	279,582
TOTAL	86,543	28,670	259,550	580,888	0	955,651
PERCENT	9.1%	3.0%	27.2%	60.8%	0.0%	100.0%

Chart 15
Sq. Ft. in Issued Building Permits 2019



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

Of the 956,000 total square feet of non-residential building space in issued permits over the current reporting period, 773,000 square feet, 81% of the total, were in projects larger than 25,000 square feet. These larger buildings and structures are shown in Table 56. The locations of these buildings are shown on Map 12.

The largest project consists of a new 236,000 square foot courthouse in Columbia. A permit was also issued for an 89,000 square foot assisted living facility in Columbia, Brightview Columbia.

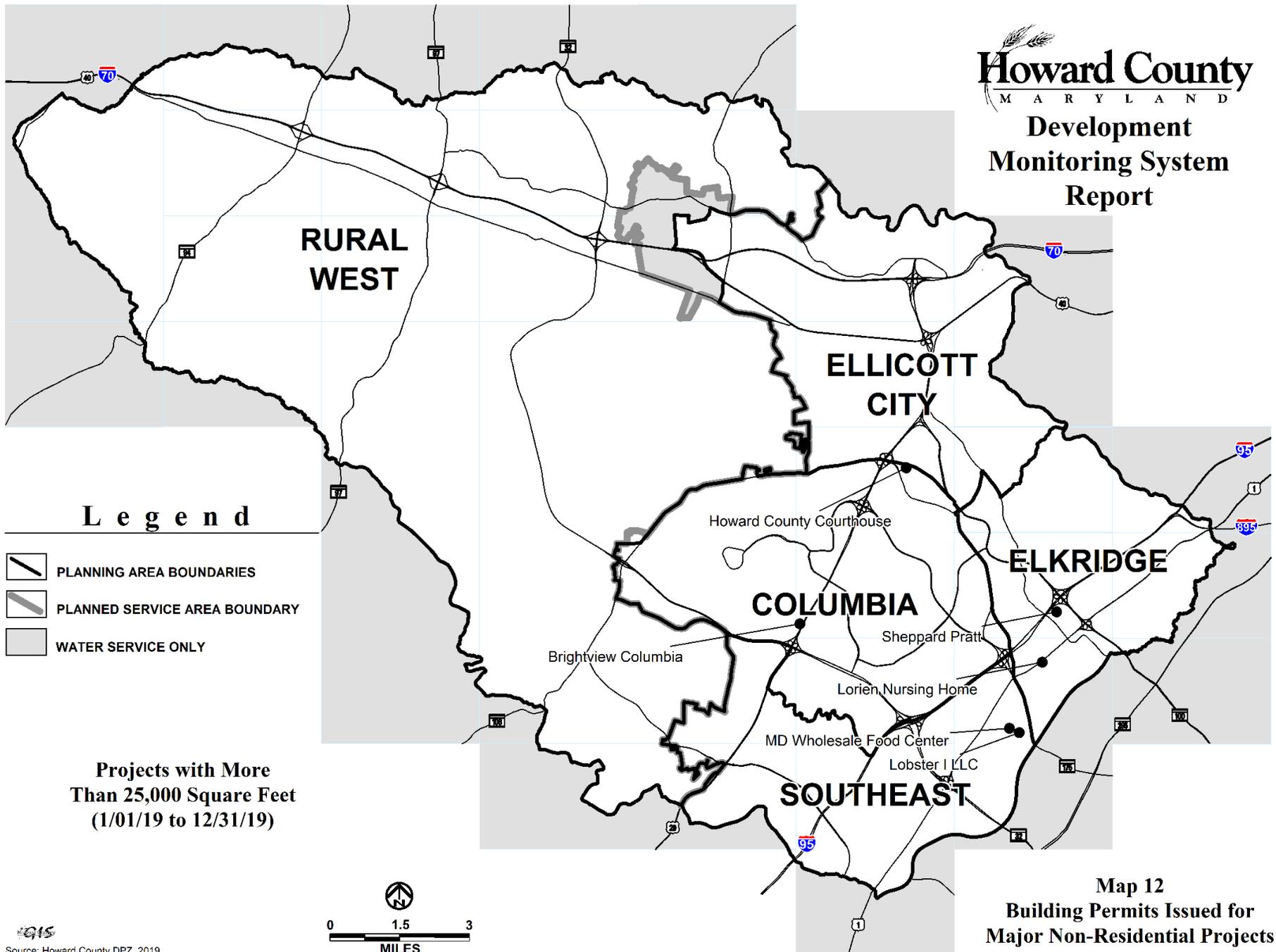
Two larger projects in Elkridge began construction in 2019—a new 155,000 square foot Sheppard Pratt behavior health hospital and a 46,000 square foot addition to the Lorien Nursing Home.

In the Southeast, a new 175,000 warehouse building was permitted at the Maryland Wholefood Center. In addition, a 70,000 square foot cold storage building received a building permit to begin construction in 2019.

Table 56
Building Permits Issued for Major Non-Residential Projects With More Than 25,000 Square Feet in 2019

Region	Name	Proposed Use	Square Feet	TOTAL
Columbia	Howard County Court House	Office Building	236,430	326,329
	Birghtview Columbia	Assisted Living Facility	89,899	
Elkridge	Sheppard Pratt	Behavior Health Hospital	155,109	201,577
	Lorien Nursing Home	Nursing Home Addition	46,468	
Southeast	MD Wholefood Center	Warehouse Building	175,200	245,200
	Lobster I LLC	Cold Storage Building	70,000	
TOTAL				773,106

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Source: Howard County DPZ, 2019.

Five Year Results

Table 57 shows issued non-residential building permits countywide for the last five reporting periods from 2015 to 2019. Over this five-year time-frame there were 370 permits issued for about 5.8 million square feet of building space. This equates to an annual average of about 1.16 million square feet per year.

The latest reporting period, with 956,000 square feet in issued permits, is 28% less than the 1.3 million square feet permitted the year before, and the fourth smallest amount of all five years.

Table 58 shows the five-year history by building type. Over the five years, 33% of the total 5.8 million square feet was for office/service space. About 28% was for government and institutional uses, 25% for manufacturing/ extensive industrial uses, 10% for retail space, and 4% for other uses. Chart 16 shows this five-year history graphically.

Table 57
Issued Non-Residential Building Permits
2015 to 2019

Year	Square Feet	Number of Permits
2015	1,280,147	88
2016	1,556,122	89
2017	678,193	82
2018	1,334,513	61
2019	955,651	50
TOTAL	5,804,626	370
ANNUAL AVG.	1,160,925	74

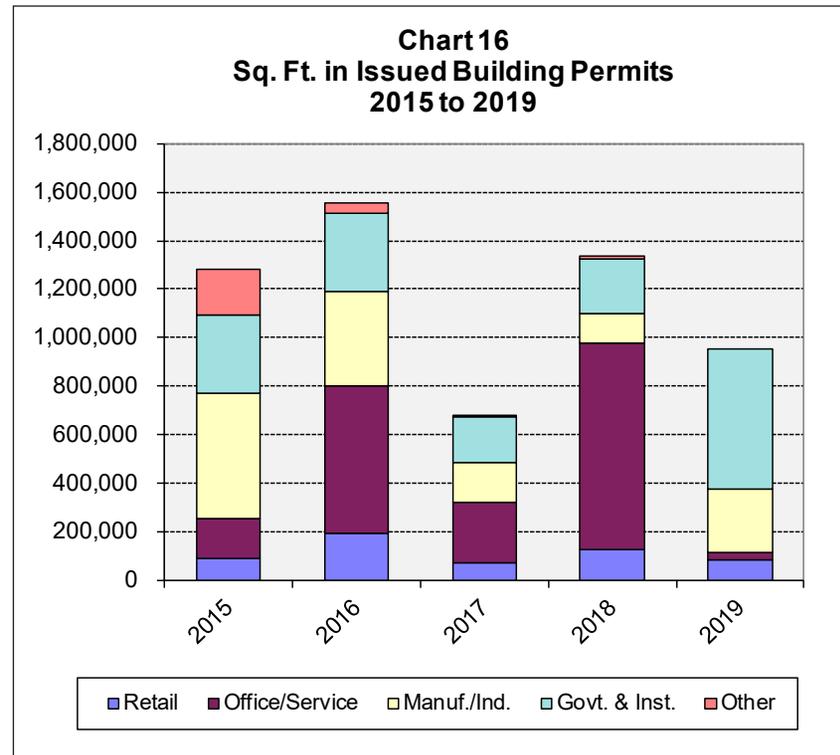


Table 58
Building Square Feet in Issued Non-Residential Building Permits
2015 to 2019

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
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
2019	86,543	28,670	259,550	580,888	0	955,651
TOTAL	572,019	1,900,655	1,451,914	1,643,556	236,482	5,804,626
PERCENT	9.9%	32.7%	25.0%	28.3%	4.1%	100.0%

Employment Estimates

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

Table 59
Square Feet per Employee Standard Factors

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

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

Job Potential from Site Development Plans

Based on the above factors, building space in site development plans approved last year from January 1, 2019, to December 31, 2019, could accommodate an estimated 1,618 employees (Table 60). About 52% of the potential jobs are located in non-Downtown Columbia, mostly all government and institutional jobs. About 32% of the potential jobs are located in the Southeast, 11% are located in Downtown Columbia, and 1% each in Elkridge and Ellicott City.

Countywide, 747 potential jobs, about 46% of the total, are government and institutional jobs. Another 422 are office/service jobs (26%), 331 are retail jobs (21%), and 119 are manufacturing/extensive industrial jobs (7%).

Table 60
Potential Employment from Approved Non-Residential SDP's in 2019
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	136	45	0	0	181	11%
All Other Columbia	106	16	119	646	886	55%
Elkridge	0	15	0	0	15	1%
Ellicott City	18	0	0	0	18	1%
Rural West	0	0	0	0	0	0%
Southeast	72	346	0	100	518	32%
TOTAL	331	422	119	747	1,618	100%
PERCENT	20.5%	26.1%	7.3%	46.1%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 61 below, there is a potential of 1,752 new jobs that could be accommodated based on issued building permits. About 66% of the total are potential government and institutional jobs, mostly in Elkridge and Columbia. This is followed by 15% manufacturing/extensive industrial jobs, and 12% retail jobs, and 7% office/service jobs.

Table 61
Potential Employment from Issued Building Permits in 2019
By Use Category

Region	Office/ Manuf./ Govt.				TOTAL	PERCENT
	Retail	Service	Ext. Ind.	& Inst.		
Downtown Columbia	32	0	0	14	46	3%
All Other Columbia	98	13	1	655	767	44%
Elkridge	0	4	1	403	408	23%
Ellicott City	83	10	0	0	93	5%
Rural West	0	0	1	89	90	5%
Southeast	4	87	256	0	347	20%
TOTAL	216	115	260	1,162	1,752	100%
PERCENT	12.3%	6.5%	14.8%	66.3%	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 62 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 2019. Observing State DLLR data, reflecting the first quarter employment data for each year, there has been an average increase of 2,235 jobs per year for the last 18 years. Job losses in 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 2018 (the latest year available) result in an annual average of 3,871 new jobs from 2001 to 2018. 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 2,132 jobs in Howard County. This follows a smaller 1,116 job increase the previous year.

Table 63 shows the jobs and average wages by job type as reported by the State DLLR for the first quarter of 2018 and 2019. In the first quarter of 2019, DLLR reported that there were 170,949 jobs in Howard County with an average weekly wage of \$1,387. This compares to 168,817 jobs one year earlier with an average wage of \$1,387 reflecting a 2.8% increase in average weekly wages over the one-year time period.

Table 62
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)	219,357	1,906
2015	159,531	3,580	227,027	7,670
2016	165,038	5,507	230,885	3,858
2017	167,701	2,663	233,913	3,028
2018	168,817	1,116	237,767	3,854
2019	170,949	2,132		
Average		2,235		3,871

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

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

Table 63
Jobs and Weekly Wages by Industry, 2018 and 2019

Job Type	2018		2019	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	663	\$1,585	661	\$1,521
State Government	1,693	\$1,090	1,757	\$1,103
Local Government	14,834	\$1,111	15,161	\$1,107
Subtotal/Average	17,190	\$1,127	17,579	\$1,122
Goods Producing				
Natural Resources and Mining	283	\$1,111	280	\$835
Construction	11,736	\$1,402	11,214	\$1,415
Manufacturing	8,204	\$1,673	8,247	\$1,689
Subtotal/Average	20,224	\$1,508	19,741	\$1,521
Service Providing				
Trade, Transportation, and Utilities	33,673	\$1,093	33,497	\$1,141
Information	3,743	\$2,219	3,737	\$2,727
Financial Activities	10,281	\$2,094	9,722	\$2,060
Professional and Business Services	45,021	\$1,862	46,398	\$1,930
Education and Health Services	19,062	\$919	19,757	\$918
Leisure and Hospitality	15,213	\$418	16,012	\$476
Other Services	4,407	\$782	4,505	\$795
Subtotal/Average	131,402	\$1,353	133,629	\$1,402
TOTAL	168,817	\$1,349	170,949	\$1,387

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

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