



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. The allocations chart in the latest adopted General Plan, *HoCo By Design*, continues to manage residential growth in the County at a predictable annual rate.

Also part of APFO is the School Capacity 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 provides for the timely construction of schools, roads, and other public infrastructure.

Development Monitoring System Report (DMS)

The Development Monitoring System 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. A section on Land Preservation is also included. Data are tabulated countywide and also by five Planning Areas, which are shown in summary maps.

Development activity in Downtown Columbia is also included in the DMS report given that the implementation of the Downtown Columbia Plan is currently in process.

Additional Reporting Requirements

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. The required 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 consistent 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 2024.

In 2024, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This reporting is due by July 1 of each year for the previous calendar year. This is the first time this information is reported in Howard County's DMS report.

The reporting of all these 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 2024, 1,381 housing units were built. This is an increase from the previous reporting period when 1,248 units were built, and the second greatest number built over the last five years (Chart 1).
- Of the 1,381 completed units last year, 19% were single family detached units, 27% were townhouse units and 54% were apartment units. Greater percentages of apartment units are likely to be built in future years 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 1,233 new housing units built in the County. About 27% of these have been single family detached units, 27% single family attached or townhouse units, and 46% apartment units.
- Last year, 40% of all units were built in Elkridge, 29% in Ellicott City, 16% in the Southeast, 12% in Columbia, and 3% in the Rural West. (See the maps later in this report for a depiction of the five planning areas and Downtown Columbia.)
- There were 981 building permits issued (housing starts) during 2024 (Chart 2). This is 12% more than the 795 permits issued in 2023.
- In 2024, there was potential for 228 housing units from recorded lots and 704 units approved in site development plans (Chart 2).
- As of December 31, 2024, there were 3,606 units in the subdivision process. This represents all units in plans under review prior to being recorded. This compares to 4,086 units in process for the prior reporting period (December 31, 2023). Many of these units are part of phased plans.
- A significant number of the in-process units—1,760 or 49% of the total 3,606—are included in future phases of phased projects with development planned as far out as 2032. The larger phased plans include Elkridge Crossing II in Elkridge; Turf Valley and Crested View at Taylor Highlands in Ellicott City; and Erickson-Oxford Hills in Columbia.

- Countywide, 9% of the units in process on December 31, 2023, were single family detached units. About 10% were single family attached units and another 81% were apartment units (including both condo and rental).

Chart 1
Issued Use & Occupancy Permits by Unit Type
2020 to 2024

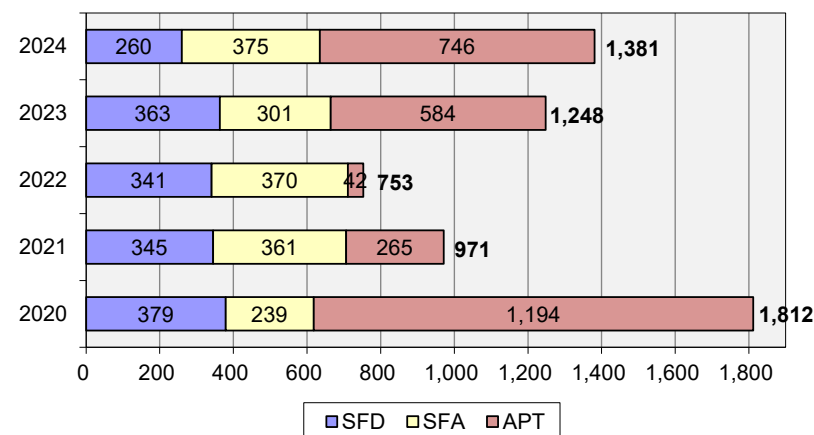
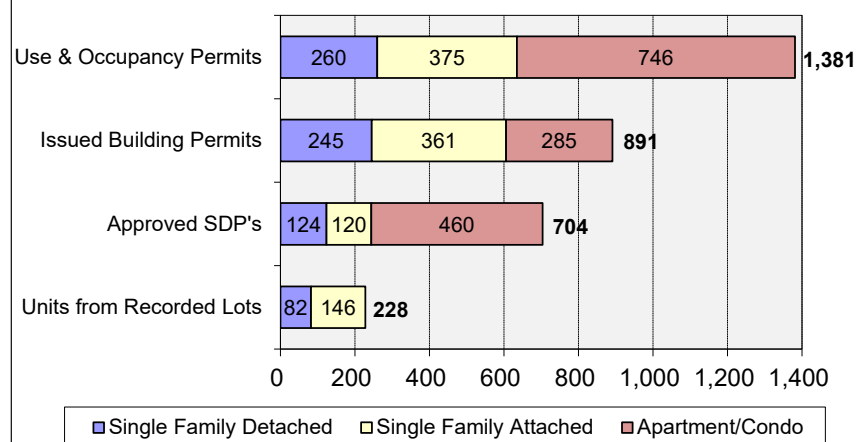


Chart 2
New Housing Units
In 2024



Age-Restricted Units

- There were 55 age-restricted housing units built in 2024, 4% of the 1,381 total units built in the County. Thirty-seven of these age-restricted units were townhomes and 18 were single family detached units. For the year prior in 2023, 37 age-restricted townhomes and 18 age-restricted single family homes were built.
- As of December 31, 2024, there were 1,611 age-restricted units in the planning process. This includes 1,200 apartment units as part of the planned Erickson development known as Oxford Hills, 44 apartment units as part of the Elms at Elkridge, 13 single family detached and 113 townhouse units in the Bethany Glen development, 95 apartment units at 5497 Waterloo Road, 89 apartment units at That Place at Patapsco Park, 25 single family detached units at Trotter's Retreat, and 27 single family detached units at Kerger Pond. For the previous reporting period there were 1,653 age-restricted units in the subdivision process.
- The 2005 DMS was the first time age-restricted units were reported. This was soon after the time the County had adopted regulatory changes enabling more of these types of units. In the last 20 years, 14% of all new homes built in Howard County have been age-restricted.

Moderate Income Housing Units (MIHU)

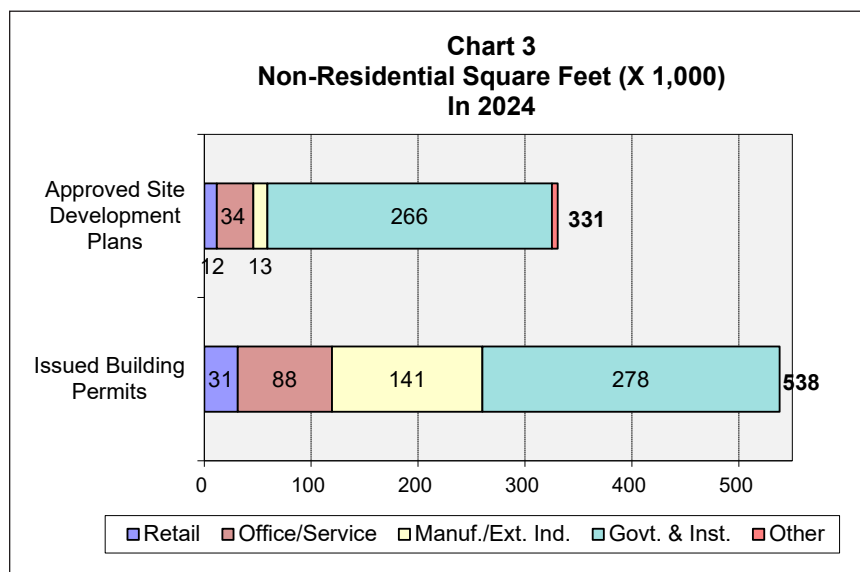
- During 2024 there were 103 MIHU units in approved plans—4 townhouse units and 99 apartment units. This is less than the 232 approved MIHU units during the previous reporting period.
- As of December 31, 2024, there were 542 MIHU units in process—2 single family detached units, 34 townhouse units and 506 apartment units. About 40% of the units are in Elkridge, 23% in the Southeast, 22% in non-Downtown Columbia, 11% in Downtown Columbia, and 4% in Ellicott City. There were 656 MIHU units in process the previous reporting period.

Land Preservation

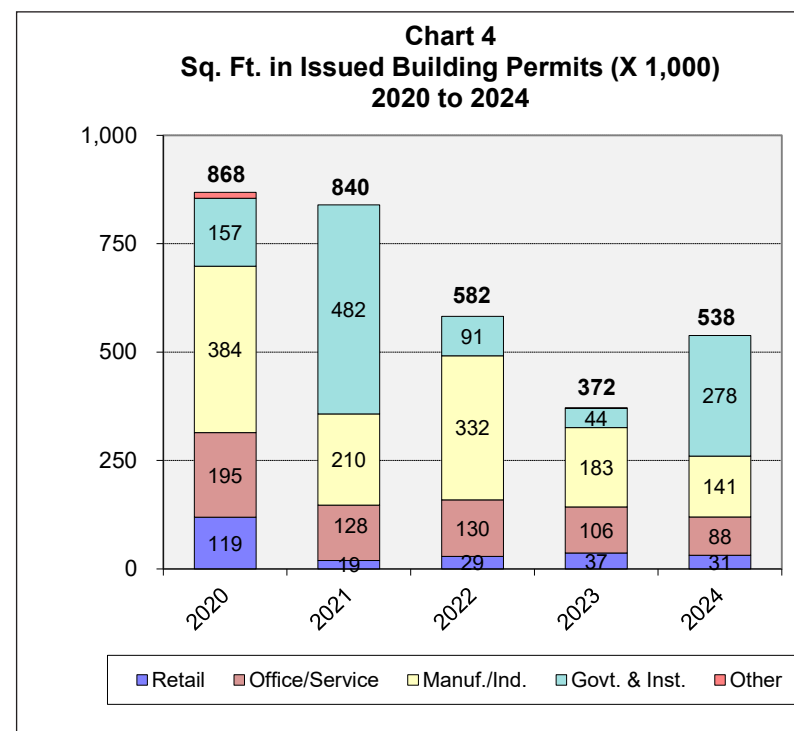
- In 2024, a total of 162 acres of new parks and open space land were acquired. The greatest amount, 98 acres, was added in the Rural West for the new Howard County Public Gardens. The remaining 64 acres were acquired as HOA and passive park land through the subdivision process in eastern Howard County.
- In 2024, close to 97 acres of land were preserved in easements, including 56 acres acquired by the Agricultural Land Preservation Program (ALPP) purchase program, a 19.6 acre agricultural preservation easement dedicated through the subdivision process, and three environmental preservation easements in the Rural West dedicated as part of the subdivision process totaling 13.2 acres. An 8 acre environmental conservation easement was acquired in Ellicott City.
- Total preserved agricultural and environmental easements and parks and open space land amount to 65,762 acres, about 40% of the total 162,000 acres of land in Howard County.

Non-Residential Development

- In 2024, about 331,000 square feet of building space were approved in site development plans. Building permits were issued for 538,000 square feet. (Chart 3).
- As shown in Chart 4 there was an increase in the square footage of issued building permits last year, from 372,000 square feet issued in 2023 to 538,000 square feet issued in 2024, which was the second highest amount in the last five years.
- About 61% of the new building space constructed last year was located in the Southeast, 27% in Columbia, 6% in Elkrigde, 5% in Ellicott City, and 1% in Downtown Columbia. There was no non-residential construction in the Rural West last year.
- Over the last five years, there was an annual average of about 482,000 square feet in approved non-residential site development plans and 640,000 square feet in issued non-residential building permits.



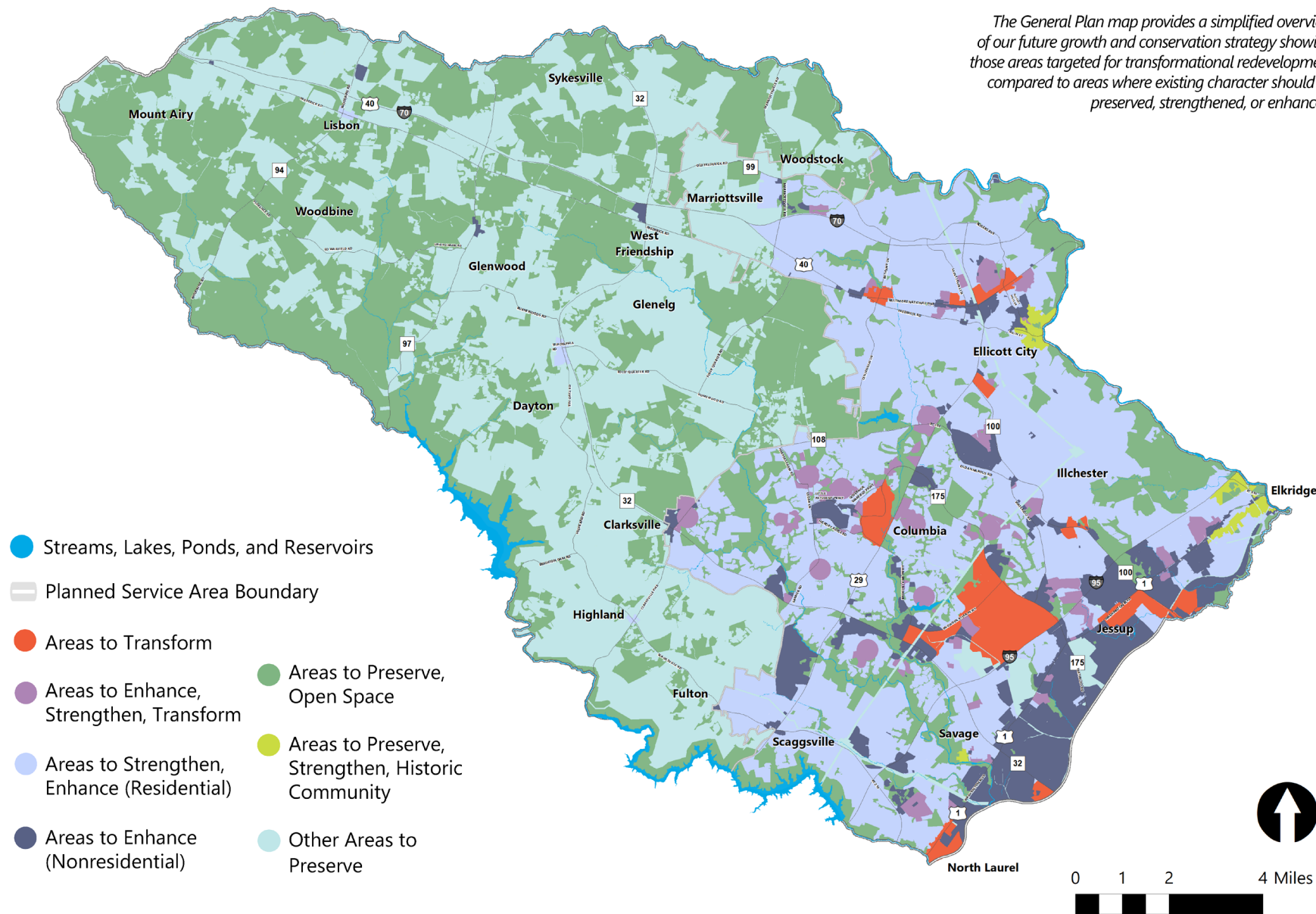
- As of December 31, 2024, there were 430,000 square feet of building space under plan review in non-residential site development plans. This is less than the 630,000 square feet under review the previous year.
- According to the Maryland Department of Labor, Howard County gained 1,810 jobs last year (1st quarter 2023 to 1st quarter 2024 estimates). The total number of jobs in Howard County as of the 1st quarter 2024 was 169,401.



THE GENERAL PLAN MAP

ADOPTED OCTOBER 2023

The General Plan map provides a simplified overview of our future growth and conservation strategy showing those areas targeted for transformational redevelopment compared to areas where existing character should be preserved, strengthened, or enhanced.



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 and 2013, 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 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.

In 2024, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This reporting is due by July 1 of each year for the previous calendar year. This is the first time this information is reported in Howard County's DMS report and is included further below.

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 2024 in support of the General Plan.

CB 2-2024 — Agricultural Land Preservation

This bill provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights in approximately 56.02 acres of agricultural land located at 1611 Saint Michaels Road, Woodbine, Howard County, Maryland, for a maximum purchase price of \$2,191,600.

CB 7-2024 — Office of Agriculture

This bill provides for the reorganization of the Executive Branch of Howard County pursuant to Section 403 of the Howard County Charter to establish an Office of Agriculture within the Department of County Administration.

CB 35 -2024 — Agricultural Land Preservation

This bill provides for a multi-year Installment Purchase Agreement by Howard County to acquire development rights in approximately 86.16 acres of agricultural land located at 880 Long Corner Road, Mount Airy, Howard County, Maryland, for a maximum purchase price of \$2,905,400.

CR 134-2024 — Eastern Howard County Enterprise Zone

This resolution supports an application to the State of Maryland for the designation of the Eastern Howard County Enterprise Zone as part of the Maryland Enterprise Zone Program. This Enterprise Zone includes the Gateway Master Planning Area.

CR 161-2024 — Long Reach Village Center Urban Renewal

This resolution approves the urban renewal project for the Long Reach Village Center in Columbia pursuant to Section 13.1106 of the Howard County Code.

Zoning Regulation Amendments (and related)

The following highlights all zoning regulation and related amendments that were approved in Howard County in 2024.

CB 14-2024 — Flex Space Land Use Classification in the Planned Office Research (POR) Zoning District

This bill amends the Howard County Zoning Regulations to allow as a matter of right in the POR district Contractor's Office and Outdoor or Indoor Storage Facilities, Self-Storage Facilities, Warehouses, Moving and Storage Establishments and Light Industrial Uses, and removes the restriction to limit the light manufacturing uses to those uses permitted in the PEC district.

CB 59-2024 — Self-Storage Buildings in the Business: General (B-2) Zoning District

This bill amends the Howard County Zoning Regulations to allow Self-Storage Facilities, Indoor as a conditional use in the Business: General (B-2) zoning district.

CB 62-2024 — School, Commercial in the Office Transition (OT) Zoning District

This bill amends the Howard County Zoning Regulations to allow Schools as a permitted use in the Office Transition (OT) zoning district.

CB 63-2024 — Self-Storage Buildings, Retail Space, and Residential Uses in the Corridor Activity Center (CAC) Zoning District

This bill amends the Howard County Zoning Regulations to allow Self Storage, Indoor as a permitted use in the Corridor Activity Center (CAC) zoning district, allows for the reduction of first floor retail space in the CAC zoning district, and allows for certain residential uses in the CAC zoning district.

CB 64-2024 — Warehousing in the Corridor Employment (CE) Zoning District

This bill amends the Howard County Zoning Regulations to allow Warehousing within a flex space as a permitted use in the Corridor Employment (CE) zoning district.

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 2023/4

CB 43-2024 — Regulation Enforcement

This bill establishes a requirement that the owner, occupant, tenant or other person in charge of a property or premises shall provide certain entry and access, allow certain entry in the instance that certain imminent dangers exist, and generally relating to enforcement of the Howard County Subdivision and Land Development Regulations and the Zoning Regulations.

CR 53-2024 — Schedule of Fees and Charges

This resolution approves a new schedules of fees and charges for functions regulated or administered by the Department of Planning and Zoning.

CR 76-2024 — School Capacity Chart

This resolution adopts the School Capacity Chart for Fiscal Year 2025 pursuant to the Adequate Public Facilities Act of Howard County, designating which school districts are open and which are closed to development and requires a certain joint special work meeting in accordance with Section 16.1103(d) of the Howard County Code.

CR 77-2024 — Housing Unit Allocation Chart

This resolution adopts the Housing Unit Allocation Chart for Fiscal Year 2025 pursuant to the Adequate Public Facilities Act of Howard County.

Zoning Map Amendments

There were no zoning map amendments approved in Howard County in 2024.

Major Infrastructure

New Roads and Changes to Roads

In 2024, 3.73 miles of new or extended roadway were constructed in Howard County. These road additions were built in 8 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 2024 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) had several projects underway in 2024. Renovation and expansion efforts continue to be concentrated within the priority funding area. These are described below and also shown in Map 1.

Systemic Renovation Projects

Systemic renovation projects include improvements and installation of systems at various school sites, including projects of a critical nature such as well and septic upgrades, HVAC upgrades, and safety updates. Replacement of HVAC systems at Manor Woods Elementary School, St. John's Lane Elementary School, and Lime Kiln Middle School. Upgrades to the water systems at West Friendship Elementary School and Lisbon Elementary School are also underway. Additional projects include various work at the Applications and Research Lab, grounds projects, artificial turf replacement, and secure vestibule upgrades.

Projects in Planning Stages

Renovations to Oakland Mills Middle School and Dunloggin Middle School continue planning work in 2024. These projects were originally planned as full replacements of the existing schools, but subsequent Board of Education action changed the scope for both to renovations with added capacity. Expected occupancy is in the late 2020s. Additionally, planning for a renovation of the Faulkner Ridge Center has begun. This project will renovate the existing, unused, former school into a regional early childhood center. Planning work has begun, and completion is estimated in 2027.

Transit Improvements

In 2024, 45 bus stops were improved at a total capital cost of \$267,000. There are currently 457 bus stops throughout Howard County. The bus stop improvements are shown in Map 1.

In addition, 6 new buses were purchased for the County's RTA system at a total cost of \$726,253. These include 4 micro transit vehicles and 2 vehicles added to the paratransit fleet.

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

In 2024, a storm water management pond located in the Sewells Orchard neighborhood on Sewells Orchard Drive was retrofitted at a cost of \$1.6 million.

A \$1.6 million stream restoration project near Lightning View Road in the Mellon Court subdivision was completed in 2024 on open space land owned by the Columbia Association.

Another capital project on Henryton Road was completed at cost of \$1.29 million. This was a grading and sediment control project for a public right of way.

A \$1.15 million capital project to construct a ballistics wall in the shooting range at the Howard County Police Training Center was also completed in 2024.

The Gerwig Lane dam retrofit project was completed at a cost of \$1.03 million. This project also included additional grading and sediment controls.

And drainage improvements on Michaels Way at a cost close to \$1 million was completed. This project also included additional grading and sediment controls.

The locations of these capital improvement projects are shown on Map 1.

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.

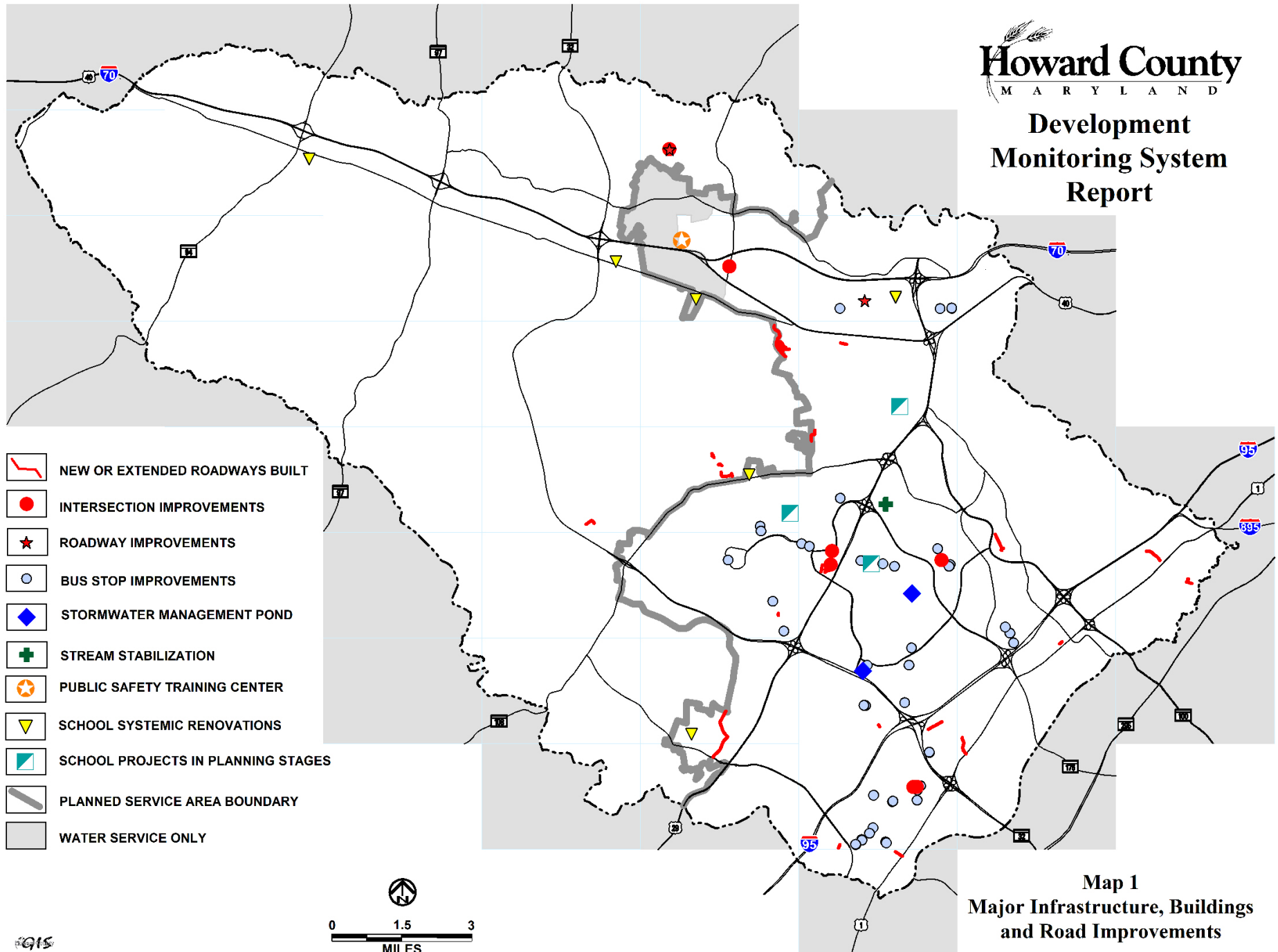
Overall, private development, new infrastructure and subdivision and zoning regulatory amendments that took place in Howard County last year are consistent with our local plans—most importantly the County’s General Plan known as *HoCo By Design*—as well as with each other and the adopted plans of adjoining 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, most all the major infrastructure and school projects that have been completed in 2024 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 *HoCo By Design* goals and objectives. This includes the various amendments to the Subdivision and Land Development Regulations, the updates to the Zoning Regulations, the agricultural preservation initiatives, and the various other action items listed on Pages 8 and 9.



Development Monitoring System Report



APFO Restrictions

The State of Maryland's Smart, Green and Growing legislation requires that each locality report on their Adequate Public Facilities Ordinance (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 and is currently providing reports annually as part of this DMS report.

The APFO 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 APFO in 1992 has allowed Howard 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 General Plan in effect for this DMS reporting period, *HoCo By Design*, maintains this lower pace of growth. Also part of APFO is the school capacity utilization 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 2024

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, growth

is evenly paced so the County 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. As an example, 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 townhouse units, would also need 30 allocations.

Under *HoCo By Design*, allocations are distributed by Character Areas. At the end of 2024, there were no residential subdivisions delayed due to allocation limitations. This is the ninth year in a row this has occurred. For all previous years, beginning with the adoption of APFO in 1992, projects have been delayed in some areas of the County due to allocation limitations. The last nine 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 most recent chart under *HoCo By Design* adopted on July 1, 2024 and included a total of 1,646 available allocations in the current allocation year distributed among the Activity Centers, Other Character Areas, the Rural West, and the Affordable Housing categories. There were an additional 447 allocations available in Downtown Columbia as defined in the Downtown Columbia Master Plan.

Closed School Restrictions in 2024

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 13 high schools, each in their own district. There are 6 elementary school regions containing anywhere from 5 to 10 contiguous elementary school districts.

At the end of 2024 there were 18 closed elementary school districts (including those that are in the Northern school region), 6 closed middle school districts, and no closed high school districts. This has resulted in

a total of 809 housing units in 18 subdivision plans on hold due to closed school districts and regions. 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.

Accommodating Future Needs

To effectively accommodate future school capacity needs, three important elements are necessary: 1) effective growth management, 2) adequate capital funding for school construction, and 3) school attendance area redistricting.

For the first element the County's APFO establish land use and growth management policies and regulations. Regular review and updates to APFO should occur to adapt to changing demographics, market conditions, and land use patterns. As required with the adoption of the County's latest General Plan, *HoCo By Design*, in December 2023, an APFO review committee has been formed to review and update the regulations. The review committee's first meeting was held in August 2024 and continues to meet bi-weekly. The review committee has up to a year to finalize any recommendations. The last time an APFO review committee convened was in 2015, resulting in significant changes to APFO in 2018.

Addressing the second element faces on-going challenges, particularly with increased service levels expectations such as providing universal pre-K instruction as required under the Blueprint for Maryland's future. Increasing capital needs to replace or renovate older schools that are near the end of their useful life is also a growing funding challenge due to continued competition for limited capital dollars. Furthermore, in recent years school construction costs have been increasing faster than the general rate of inflation.

The third element, school attendance area redistricting, is also a useful way to solve school capacity needs. The Howard County Public School System strives 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 a necessary tool to utilize available systemwide capacity.

Over the last several years, there have been actions to address each of these three elements. APFO has been amended, and the General Plan update, *HoCo By Design*, was adopted and became effective at the end of 2023. As a result another APFO review committee has been formed with the goal to finalize their recommendations later in 2025. Regarding funding, the Maryland 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 two years, followed by increases based on inflation thereafter. The current rate is \$8.15 per square foot. This increase is bringing in additional revenues for school construction. However, these increased revenues may be limited to the extent that new residential development slows given limited land availability for new development. Regarding redistricting, the Howard County Board of Education completed a comprehensive redistricting for the 2020/21 school year that included boundary line adjustments at the elementary and middle school levels. A more recent redistricting was adopted by the Board of Education in November 2022 to accommodate the opening of the 13th high school in the fall of 2023. A new redistricting process will be soon underway to relieve elementary school crowding in the Columbia and Ellicott City areas to be completed for implementation for the school year beginning in 2026.

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 2024. The Smart, Green and Growing legislation also requires jurisdictions in Maryland to report on net density of growth both inside and 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. 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. This is not a gross density calculation which would also include open space, roads, stormwater management, and other infrastructure, but a simple net density calculation based on lot size alone. 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 new residential development in Howard County in 2024 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 close to 60 units per acre. This higher density is due to two recently completed apartment buildings with 521 units built on a combined total of 8.7 acres. The next highest average density for completed housing units is in Columbia at close to 45 units per acre. This is followed by Ellicott City at about 16 units per acre, and the Southeast at about 12 units per acre. The Rural West, as expected, had the lowest average lot density at 0.7 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 36 units per acre. This compares to a much smaller lot density of 0.7 units per acre outside the PFA.

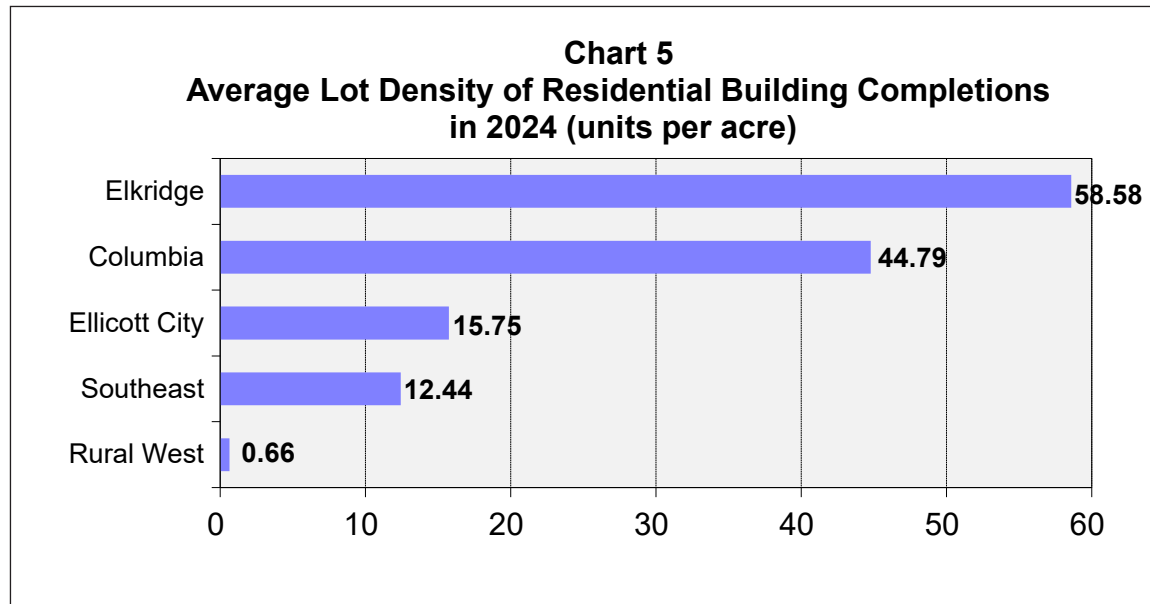
Map 2 shows the location of the completed units and also the relative lot densities. The map includes the PFA line. It is clear from the map that greater lot densities are being achieved inside the PFA.

Table 1
Lot Density of Units Built in 2024 - By Planning Area

Planning Area	Units		Total Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Columbia	164	12%	6.5	3.3%	44.79
Elkridge	559	40%	18.9	9.7%	58.58
Ellicott City	394	29%	40.5	20.7%	15.75
Rural West	37	3%	98.0	50.2%	0.66
Southeast	227	16%	31.5	16.1%	12.44
TOTAL	1,381	100%	195.2	100.0%	35.59

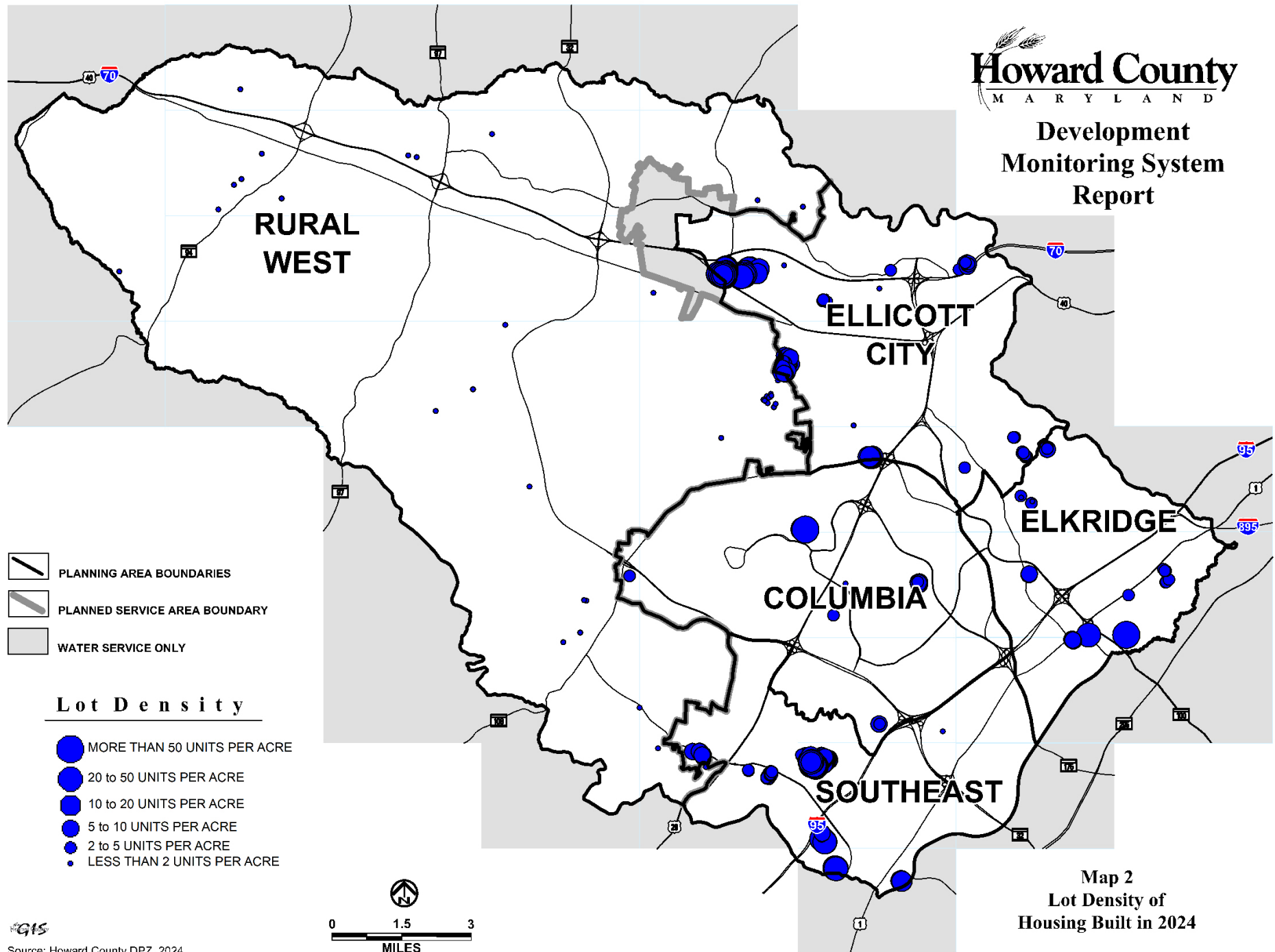
Table 2
Lot Density of Total Units Built in 2024 - Inside vs. Outside PFA

Planning Area	Units		Lot Acres		Density - Units/Acre (Weighted Avg.)
	Number	Percent	Number	Percent	
Inside PFA	1,344	97%	97.2	50%	36.55
Outside PFA	37	3%	98.0	50%	0.66
TOTAL	1,381	100%	195.2	100%	35.59





Development Monitoring System Report



Source: Howard County DPZ, 2024.



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 described in this current year DMS report is the general plan effective in 2024, which is *HoCo By Design* adopted in December 2023. This plan 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 this growth is managed to the goal.

HoCo By Design sets 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 prior to the adoption of *PlanHoward 2030* in 2012. Prior to that, with the adoption of the *2000 General Plan* in 2000, the number had been 250 per year. The initial reduction from 250 units to 150 units was based on the re-allocation of 100 units to a new "Green Neighborhood" allocation pool for projects that meet environmentally sustainable site and building design criteria. 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 reduced the annual number of housing units to be built outside the PFA, but also promotes more sustainable development within the County. *HoCo By Design* maintains the lower level of 100 units per year in the Rural West.

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 *Hoco By Design* from to 2040. A total of 1,500 new units are allocated to areas outside the

PFA, representing only 6.2% of all new units Countywide. The remaining 93.8% of future units are allocated to areas inside the PFA.

Progress Towards Growth Goal

For the current reporting period, based on September 30, 2024, unit counts, 11.9% of all housing units in the County are outside the PFA. The remaining 88.1% are inside the PFA. This is summarized in Table 4.

Comparing this to the *HoCo By Design* policy of allocating only 6.2% 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 2040. The percentage of total units outside the PFA will decrease between now and then, from 11.9% currently to 10.9% by 2040.

Table 3
HoCo By Design Growth Projections
2026 to 2040

Inside PFA	22,794	93.8%
Outside PFA	1,500	6.2%
Total	24,294	100.0%

Table 4
Total Built Units in Howard County
September 30, 2024

Inside PFA	111,778	88.1%
Outside PFA	15,038	11.9%
Total	126,816	100.0%

Table 5
Total Units by 2040 based on HoCo By Design

Inside PFA	134,572	89.1%
Outside PFA	16,538	10.9%
Total	151,110	100.0%

Resources to Achieve Goal

In addition to the County's APFO, described above, which 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 *HoCo By Design*, Activity Centers and Growth Tiers are 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 *HoCo By Design* for a discussion on and maps depicting the Activity Centers and Growth Tiers in Howard County.

Plan Processing Times

In 2024, the Maryland General Assembly enacted a new law requiring local governments with a population over 150,000 to measure and report on residential development plan processing times for all plan types. This reporting is due by July 1 of each year for the previous calendar year. This is the first time this information is reported in Howard County's DMS report. The mean and median processing times in days as well as the standard deviation from the mean is reported. Table 6 shows these results for 2024.

The results in Table 6 reflect plans by plan type that had signature approval in 2024, and also recorded final plans in 2024. The timeframe is from the initial plan submission until the signature approval date (or recorded date for final plans) including the time for required plan revisions. The mean time ranges from 206 days for Environmental Concept Plans to 461 days for Final Plan recordations. The median time ranges from 168 days for Environmental Concept Plans to 392 days for Preliminary Equivalent Sketch Plans. The standard deviations from the mean are also shown. These range from 118 days for Preliminary Equivalent Sketch Plans to 553 days for Final Plan recordations. The greater standard deviation for Final Plans reflects the longer approval time for several of the plans often due to developers pausing their plan processing and requesting an alternative compliance to extend plan submission milestone dates.

Table 6
Plan Review Times by Plan Type for Plans Completed in 2024 - Total Days

Measure	Environ- mental	Preliminary Equivalent		Site		
	Concept	Sketch	Sketch	Preliminary	Final	Development
Number of Plans	30	4	2	None	40	22
Mean Time in Days	206	247	392	NA	461	379
Median Time in Days	168	214	392	NA	203	327
Standard Deviation from Mean	148	156	118	NA	553	252

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 2024 were recorded or in existence prior to 2020, 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 area plus Downtown Columbia as its own area.

Summary of Latest Reporting Period

For the latest reporting period from January 1, 2024, through December 31, 2024, there was potential for 228 housing units from recorded lots Countywide in 42 subdivision plans totaling 442 acres (Table 7). Ellicott City had the most with 171 units, 75% of the total. The Southeast had potential for 36 units, 16% of the total. There were 10 units in recorded subdivision plans in the Rural West (4%), 7 units in Columbia (3%) and 4 units in Elkridge (2%). These represent net new unit potential and do not in-

clude total recorded lots from resubdivisions that do not create new unit potential. 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 442 acres recorded, 191 acres, or about 43%, 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 8 shows new units from recorded lots by unit type. Of the 228 units from recorded lots, 82 are for single family detached units (SFD), 146 are for single family attached or townhouse units (SFA), and none for apartment units (APT). Chart 6 shows these results graphically by Planning Area.

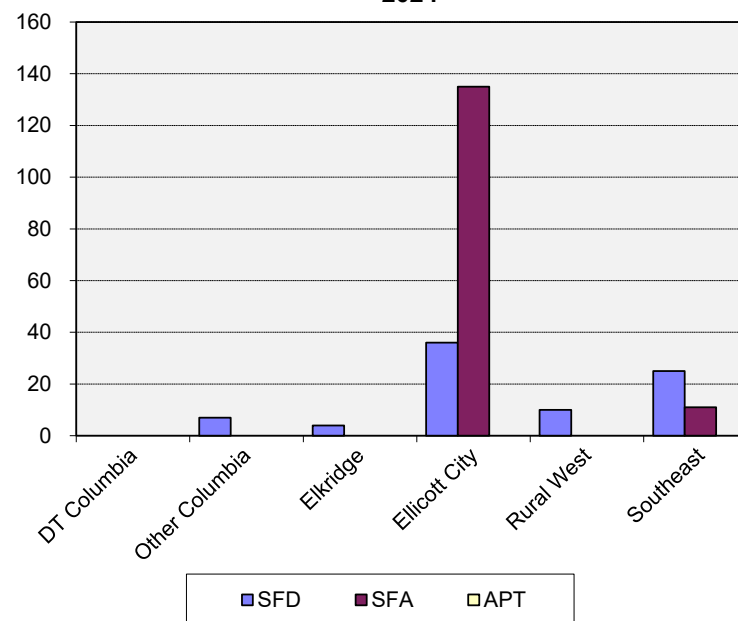
Table 7
Recorded Residential Subdivisions in 2024

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	7	3%	10	24%	29	6%
Elkridge	4	2%	5	12%	5	1%
Ellicott City	171	75%	11	26%	169	38%
Rural West	10	4%	10	24%	191	43%
Southeast	36	16%	6	14%	48	11%
TOTAL	228	100%	42	100%	442	100%

Table 8
Unit Potential from Recorded Lots by Unit Type in 2024

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	7	0	0	0	7	3%
Elkridge	4	0	0	0	4	2%
Ellicott City	36	135	0	0	171	75%
Rural West	10	0	0	0	10	4%
Southeast	25	11	0	0	36	16%
TOTAL	82	146	0	0	228	100%
PERCENT	36%	64%	0%	0%	100%	

Chart 6
New Unit Potential From Recorded Lots
2024



Last Year's Projects - 10 or More Units

Of the total 228 units from lots recorded for the latest reporting period, 185 or about 81% were in subdivisions consisting of 10 units or more. These larger subdivisions, shown in Table 9, are located in two of the five planning areas. The precise locations of these plans are shown on Map 3.

These larger recorded plans include Bethany Glen and the Lacey Property in Ellicott City, and Beechwood Manor in the Southeast.

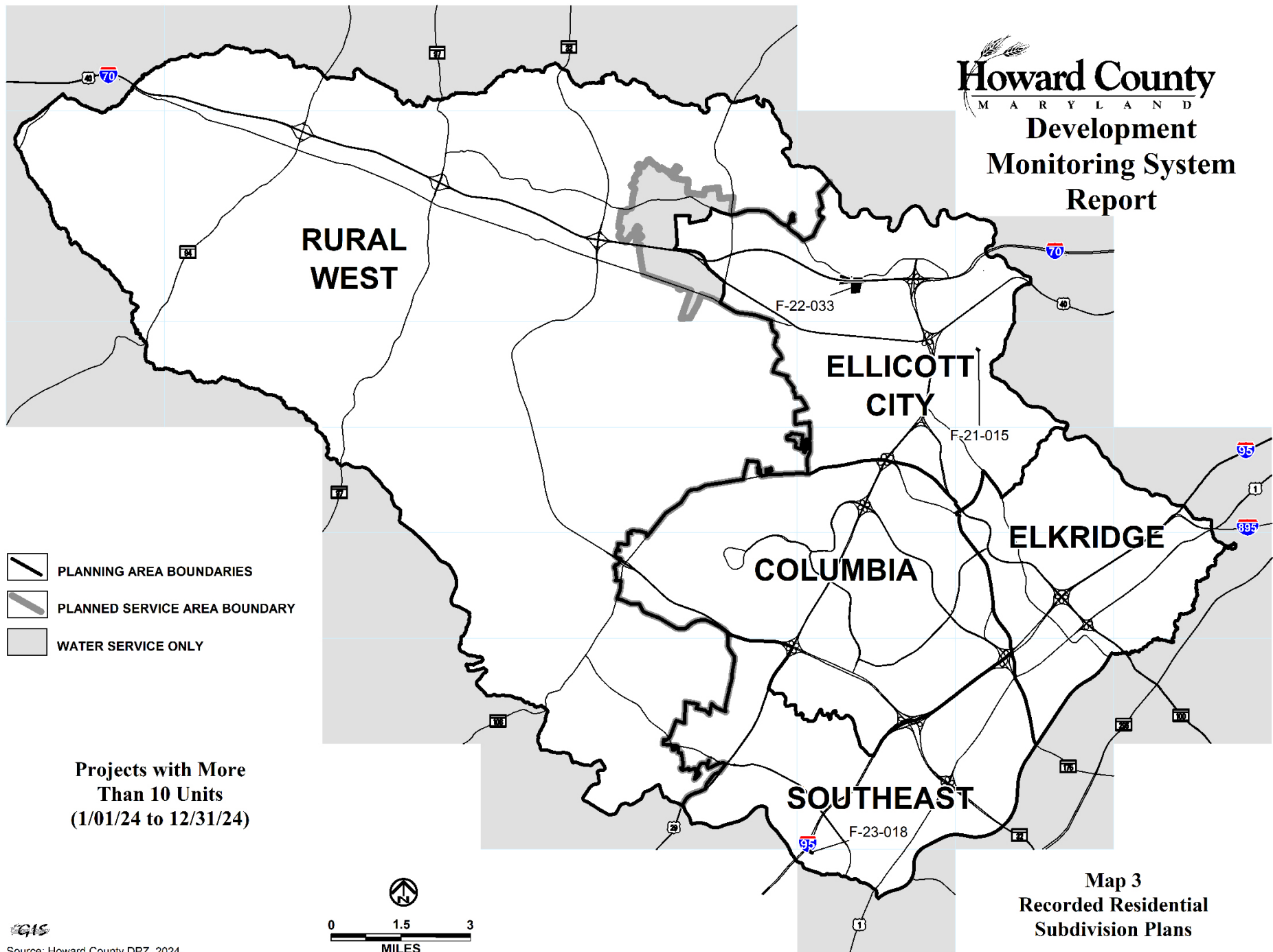


Table 9
Recorded Residential Subdivision Plans, Projects With 10 Units or More in 2024

Planning Area	File Number	Plan Name	Unit Type	Units	Total
Ellicott City	F-22-033	Bethany Glen	SFD & SFA - Age Restricted	154	154
	F-21-015	Lacey Property	SFD	12	12
Southest	F-23-018	Beechwood Manor	SFD	19	19
TOTAL					185

Five Year Results

Table 10 shows the recorded subdivisions for the last five years beginning in 2020. Over this time period, lots for 2,773 units countywide in 278 subdivision plans totaling 4,127 acres were recorded. This equates to an annual average of 555 units per year.

Note that the acreage figure represents all acreage on recorded plats including open space and preservation easements, as well as resubdivisions, sending and receiving preservation parcels, and recordations that do not add any new units such as recording for the purpose of adding easements or adjusting parcel lines.

Table 10
Recorded Residential Subdivision, 2020 to 2024

Year	Units	Plans	Acreage
2020	1,375	55	596
2021	299	79	2,001
2022	677	57	732
2023	194	45	356
2024	228	42	442
TOTAL	2,773	278	4,127
ANNUAL AVG.	555	56	825

Table 11 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 892 single family detached units, 32% of the total 2,773. A total of 1,104, 40%, were for single family attached units and the remaining 777, 28%, were for apartments units (rental and condo).

Table 11
Unit Potential from Recorded Lots by Unit Type, 2020 to 2024

Year	SFD	SFA	APT	MH	Total
2020	304	296	775	0	1,375
2021	175	122	2	0	299
2022	222	455	0	0	677
2023	109	85	0	0	194
2024	82	146	0	0	228
TOTAL	892	1,104	777	0	2,773
PERCENT	32%	40%	28%	0%	100%
ANNUAL AVG.	178	221	155	0	555

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 and 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, 2024, are tabulated and compared with those in process the prior year (as of December 31, 2023).

Number of Plans

There were 16 less residential plan in process as of December 31, 2024, compared to one year earlier – 109 plans in 2024 compared to 125 in 2023 (Table 12).

For the current year, the Rural West had the greatest number of residential plans in process with 30, followed by the Ellicott City with 28, Elkridge with 27, the Southeast with 14, and Columbia with 10.

Of the 109 plans in process on December 31, 2024, 58 were final plans, 29 were environmental concept plans, 11 were sketch plans, 10 were preliminary equivalent sketch plans, and 1 was a preliminary plan.

Number of Potential Units

There were 480 less units in process on December 31, 2024, compared to the previous year – 3,606 units compared to 4,086 units (Table 13).

It is important to note that a significant number of the 3,606 units in process are part of phased projects with building planned for future years.

Table 12
Number of Residential Subdivision Plans in Process, 12/31/24
(With comparisons to Countywide total as of 12/31/23)

Planning Area	Environmental Concept	Preliminary Equivalent				TOTAL PLANS
		Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	3	0	2	0	5	10
Elkridge	4	4	1	0	18	27
Ellicott City	4	2	4	1	17	28
Rural West	13	0	3	0	14	30
Southeast	5	5	0	0	4	14
TOTAL	29	11	10	1	58	109
As of 12/31/23	31	14	11	1	68	125

Phasing is often at a developer’s preference and dictated based on market absorption, and also results from APFO regulations that limit the number of allocations available each year. As shown in Table 14, 1,760 units are part of phased plans, with building planned as far out as 2032. Phased plans represent 49% of the total units in process.

The phased projects include Maple Lawn in the Southeast; Elkridge Crossing II in Elkridge; Turf Valley and Crested View at Taylor Highlands in Ellicott City; and Oxford Hills (Erickson) in the Columbia Planning Area.

As reflected in Table 13, 9% of the units in process are single family detached units. About 10% are single family attached units and 81% are apartment units (condo or rental). Table 15 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 13
Number of Potential Units from Subdivision Plans in Process, 12/31/24
 (With comparisons to Countywide total as of 12/31/23)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	0	0	0
All Other Columbia	33	0	1,200	0	1,233
Elkridge	69	189	721	0	979
Ellicott City	67	174	350	0	591
Rural West	112	0	0	0	112
Southeast	41	0	650	0	691
TOTAL	322	363	2,921	0	3,606
PERCENT	9%	10%	81%	0%	100%
As of 12/31/23	341	405	3,340	0	4,086

Chart 7
Subdivisions in Process - New Unit Potential
12/31/2024

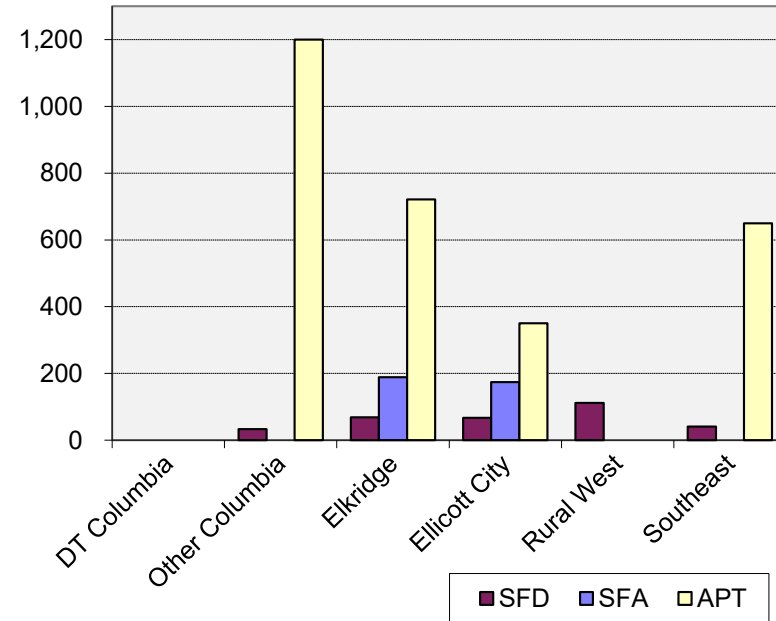


Table 14
Potential Units from Phased Projects in Process, 12/31/24

Planning Area	2025	2026	2027	2028	2029	2030	2031	2032	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0
All Other Columbia	0	200	200	200	200	200	200	0	1,200
Elkridge	0	18	15	15	0	0	0	0	48
Ellicott City	0	52	92	92	91	90	40	23	480
Southeast	0	0	0	0	0	32	0	0	32
Rural West	0	0	0	0	0	0	0	0	0
TOTAL	0	270	307	307	291	322	240	23	1,760

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

Table 15
Number of Potential Units from Subdivision Plans in Process by Unit Type, 12/31/24

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	26	0	1,200	0	1,226
Elkridge	9	54	451	0	514	3	0	0	0	3
Ellicott City	8	30	193	0	231	14	44	0	0	58
Rural West	0	0	0	0	0	32	0	0	0	32
Southeast	37	0	650	0	687	0	0	0	0	0
TOTAL	54	84	1,294	0	1,432	75	44	1,200	0	1,319

Planning Area	Preliminary					Final					TOTAL - 12/31/24				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Downtown Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
All Other Columbia	0	0	0	0	0	7	0	0	0	7	33	0	1,200	0	1,233
Elkridge	0	0	0	0	0	57	135	270	0	462	69	189	721	0	979
Ellicott City	9	0	0	0	9	36	100	157	0	293	67	174	350	0	591
Rural West	0	0	0	0	0	80	0	0	0	80	112	0	0	0	112
Southeast	0	0	0	0	0	4	0	0	0	4	41	0	650	0	691
TOTAL	9	0	0	0	9	184	235	427	0	846	322	363	2,921	0	3,606

Number of Acres

As of December 31, 2024, a total of 1,145 acres of residential land were in the subdivision process. This is 215 less acres compared to the previous year, at which time there were 1,359 acres in process (Table 16).

Major Projects

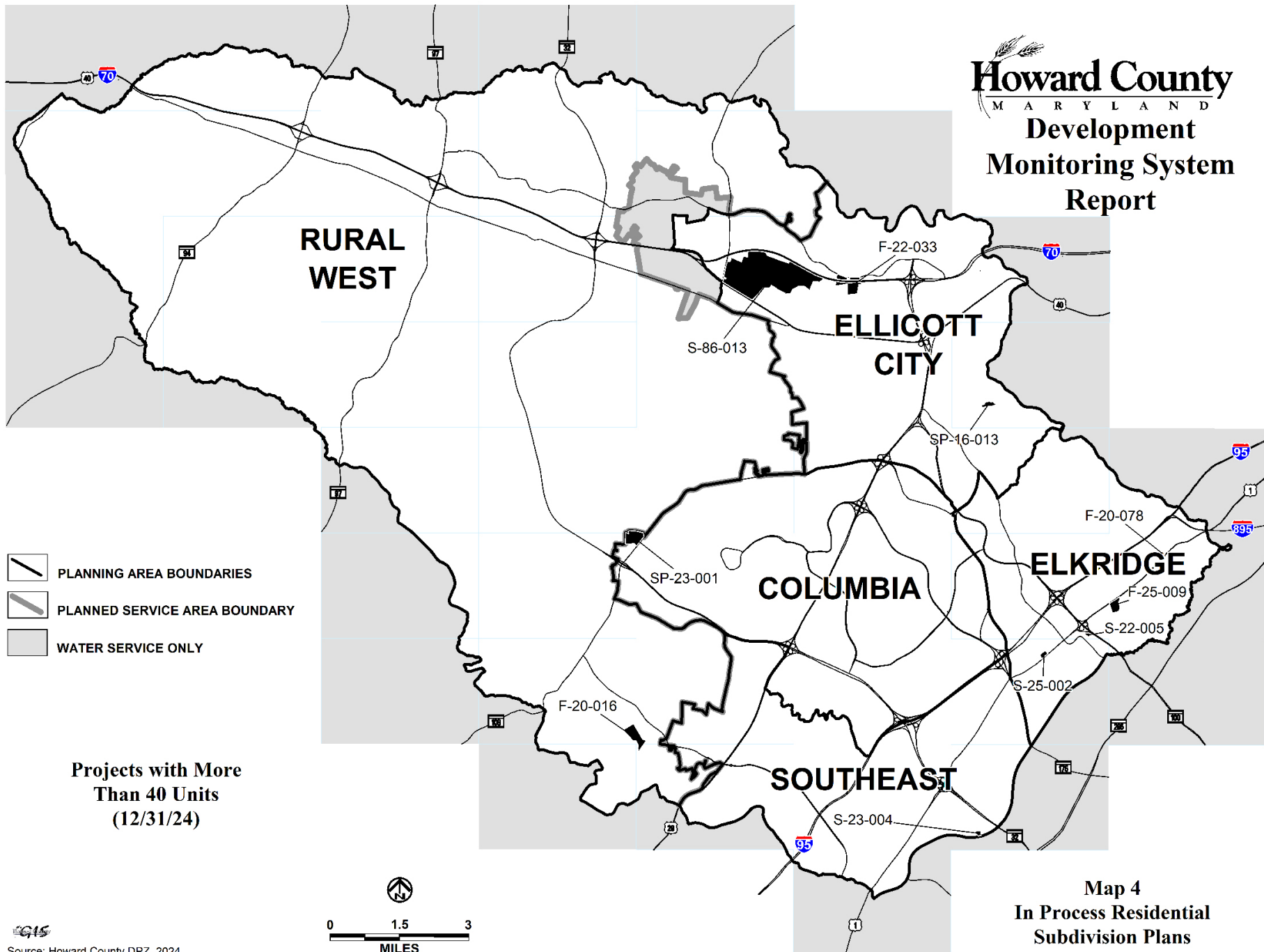
Table 17 shows a list of potential units from larger projects currently under review with more than 40 units. This list includes comprehensive and phased projects. Map 4 shows the location of these projects. The projects in this list include Erickson-Oxford Hills, the Elms at Elkridge, Weinman Apartments, Dorsey Business Center, Elkridge Crossing Section 4, Crested View at Taylor Highlands, Turf Valley, Lyhus Property, and 10010 Junction Drive. These major projects with more than 40 units total 3,339 units which account for about 93% of the total 3,606 units in the subdivision process.

Table 16
Acreage of Residential Subdivision Plans in Process, 12/31/24
(With comparisons to Countywide total as of 12/31/23)

Planning Area	Preliminary Equivalent				TOTAL ACRES
	Sketch	Sketch	Preliminary	Final	
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	76	0	69	145
Elkridge	19	3	0	102	123
Ellicott City	22	49	3	255	329
Rural West	0	132	0	337	469
Southeast	74	0	0	5	78
TOTAL	114	260	3	768	1,145
As of 12/31/23	162	259	3	935	1,359

Table 17
In-Process Residential Subdivision Plans, Projects With More than 40 Units, 12/31/24

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SP-23-001	Erickson - Oxford Hills	APT - Age Restricted - 120 MIHU	1,200	1,200
Elkridge	F-25-009	Elms at Elkridge	APT, SFA - 54 MIHU, 44 Age Restricted	357	910
	S-25-002	Weinman Apartments	APT, SFA - 39 MIHU	255	
	S-22-005	Dorsey Business Center	APT - 38 MIHU	250	
	F-20-078	Elkridge Crossing, Section 4	SFA - 8 MIHU	48	
Ellicott City	SP-16-013	Crested View at Taylor Highlands	SFA, APT - 14 MIHU	257	524
	S-86-013	Turf Valley - Remaining Phases	SFA, APT	223	
	F-22-033	Turf Valley - POR	SFA - Age Restricted - 5 MIHU	44	
Rural West	F-20-016	Lyhus Property	SFD - Age Restricted	55	55
Southeast	S-23-004	10010 Junction Drive	APT -- 98 MIHU	650	650
TOTAL					3,339



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 2024 there were 704 housing units approved in 24 site development plans totaling 169 acres (Table 18). The Southeast had 374 approved units, followed by Columbia with 154 units, Ellicott City with 90 units, the Rural West with 58 units, and Elkridge with 28 units. There were no approved units in Downtown Columbia in 2024.

Table 19 shows new units from approved site development plans by unit type. Of the 704 approved units, 18% were for single family detached units, 17% were for single family attached units and 65% for apartment units (rental and condo). Chart 8 shows these results graphically.

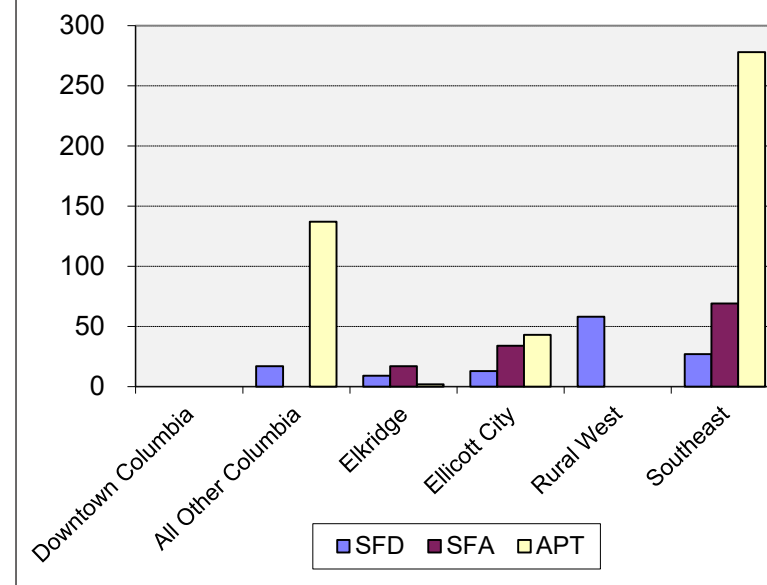
Table 18
Approved Residential Site Development Plans in 2024

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	154	22%	6	25%	14	8%
Elkridge	28	4%	4	17%	6	3%
Ellicott City	90	13%	7	29%	58	34%
Rural West	58	8%	1	4%	71	42%
Southeast	374	53%	6	25%	20	12%
TOTAL	704	100%	24	100%	169	100%

Table 19
Approved Units in SDP's by Unit Type in 2024

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	17	0	137	0	154	22%
Elkridge	9	17	2	0	28	4%
Ellicott City	13	34	43	0	90	13%
Rural West	58	0	0	0	58	8%
Southeast	27	69	278	0	374	53%
TOTAL	124	120	460	0	704	100%
PERCENT	18%	17%	65%	0%	100%	

Chart 8
Units in Approved Site Development Plans
2024



Last Year’s Projects - Greater than 20 Units

Of the total 704 units approved in site development plans last year, 591 or about 84% were in part of projects with more than 20 units. These larger projects, shown in Table 20, are located in four planning areas. The location of these plans are shown on Map 5.

Five Year Results

Tables 21 and 22 show the approved residential site development plans from January 1, 2020 to December 31, 2024. Over this five-year period 4,795 units were approved countywide in 154 site development plans totaling 690 acres.

Table 20
Approved Residential SDP's, Projects With More Than 20 Units in 2024

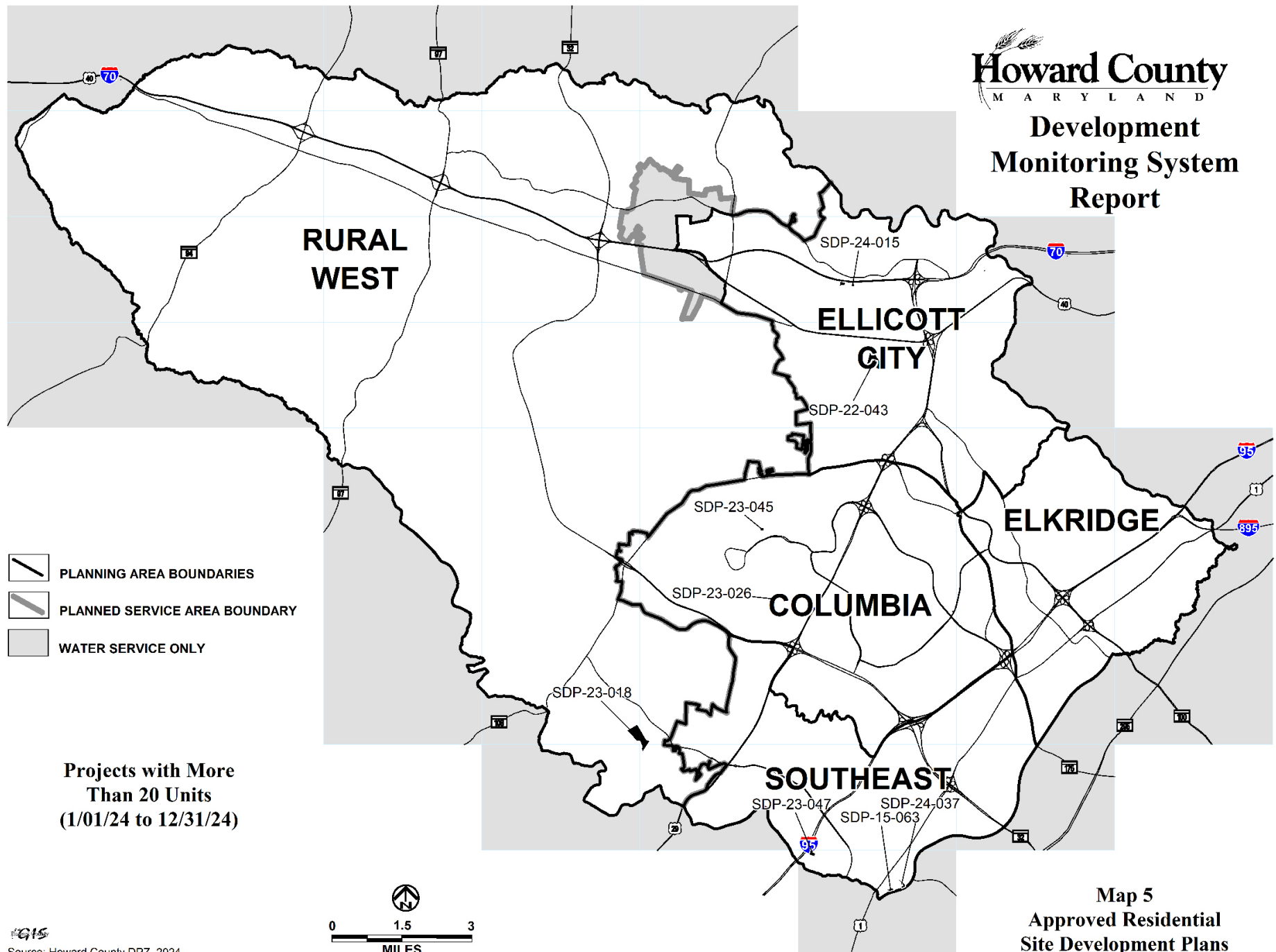
Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-23-026	Patuxent Commons	APT - 31 MIHU	76	137
	SDP-23-045	Waverly Winds Apartments	APT - 25 MIHU	61	
Ellicott City	SDP-22-043	Lutheran Village at Miller's Grant	APT - Age Restricted	43	71
	SDP-24-015	Bethany Glen	SFD & SFA - Age Restricted	28	
Rural West	SDP-23-018	The Highlands	SFD - Age Restricted	58	58
Southeast	SDP-15-063	Paddock Pointe, Phase 2	APT - 42 MIHU	236	325
	SDP-24-037	Paddock Pointe, Phase 3B	SFA	58	
	SDP-23-047	Beechwood Manor	SFD & SFA - 2 MIHU	31	
TOTAL					591

Table 21
Approved Units in Residential Site Development Plans, 2020 to 2024

Year	SFD	SFA	APT	MH	Total
2020	139	311	653	0	1,103
2021	325	87	264	0	676
2022	177	553	229	0	959
2023	224	246	883	0	1,353
2024	124	120	460	0	704
TOTAL	989	1,317	2,489	0	4,795
PERCENT	21%	27%	52%	0%	100%
ANNUAL AVG.	198	263	498	0	959

Table 22
Approved Residential Site Development Plans, 2020 to 2024

Year	Units	Plans	Acreage
2020	1,103	33	171
2021	676	38	134
2022	959	28	96
2023	1,353	31	120
2024	704	24	169
TOTAL	4,795	154	690
ANNUAL AVG.	959	31	138



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, 2024, are tabulated and compared to those in process a year earlier (as of December 31, 2023). SDPs are generally not required for large lots in the Rural West. Consequently, SDPs do not account for all residential growth in the County.

Number of Plans

There was one more residential site development plans in process as of December 31, 2023, compared to the prior reporting period in 2022, 40 in 2024 compared to 39 in 2023 (Table 23).

Table 23
Number of Residential SDP's In Process, 12/31/24 & 12/31/23

Planning Area	2024	2023
Downtown Columbia	1	1
All Other Columbia	5	6
Elkridge	14	11
Ellicott City	13	13
Rural West	0	1
Southeast	7	7
TOTAL	40	39

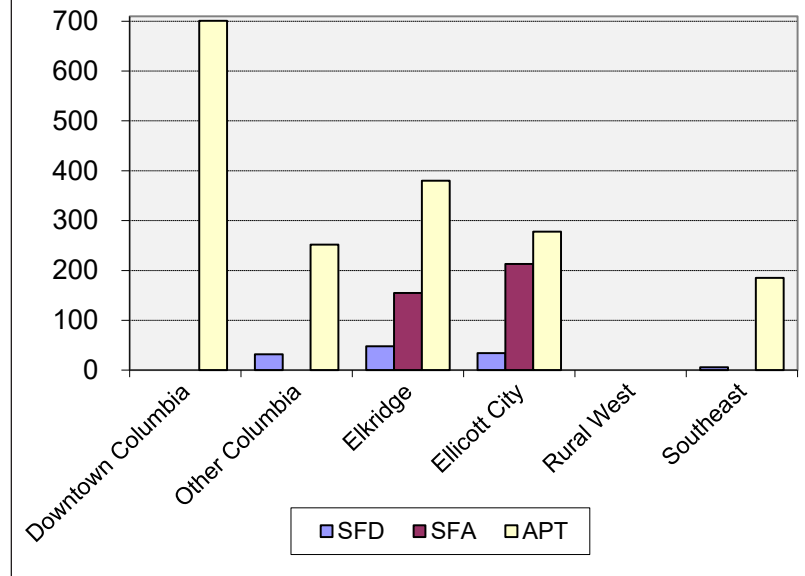
Number of Potential Units

There were 93 more units in process as of December 31, 2024, compared to December 31 of the previous year, 2,284 units compared to 2,191 units (Table 24). The greatest number of units in process are for apartments (including rental and condo) with 1,796 proposed units in 2024. This is followed by 368 proposed single family attached or townhouse units and 120 single family detached units. Chart 9 graphically illustrates the units in process by unit type for the current year by planning area.

Table 24
Number of Potential Units from Site Development Plans in Process, 12/31/24
(With comparisons to Countywide total as of 12/31/23)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Downtown Columbia	0	0	701	0	701
All Other Columbia	32	0	252	0	284
Elkridge	48	155	380	0	583
Ellicott City	34	213	278	0	525
Rural West	0	0	0	0	0
Southeast	6	0	185	0	191
TOTAL	120	368	1,796	0	2,284
As of 12/31/23	190	220	1,781	0	2,191

Chart 9
SDP's in Process - New Unit Potential
12/31/24



Number of Acres

As of December 31, 2024, a total of 206 acres of residential land were in the site development plan process. This is 46 acres less than the previous year when there were 252 acres in process (Table 25).

Major Projects

Table 26 shows a list of potential units from larger projects with 20 or more units. Map 6 shows the location of these projects. Of the 2,284 units in the site development plan process, 2,224 or about 97% were in projects with 20 or more units.

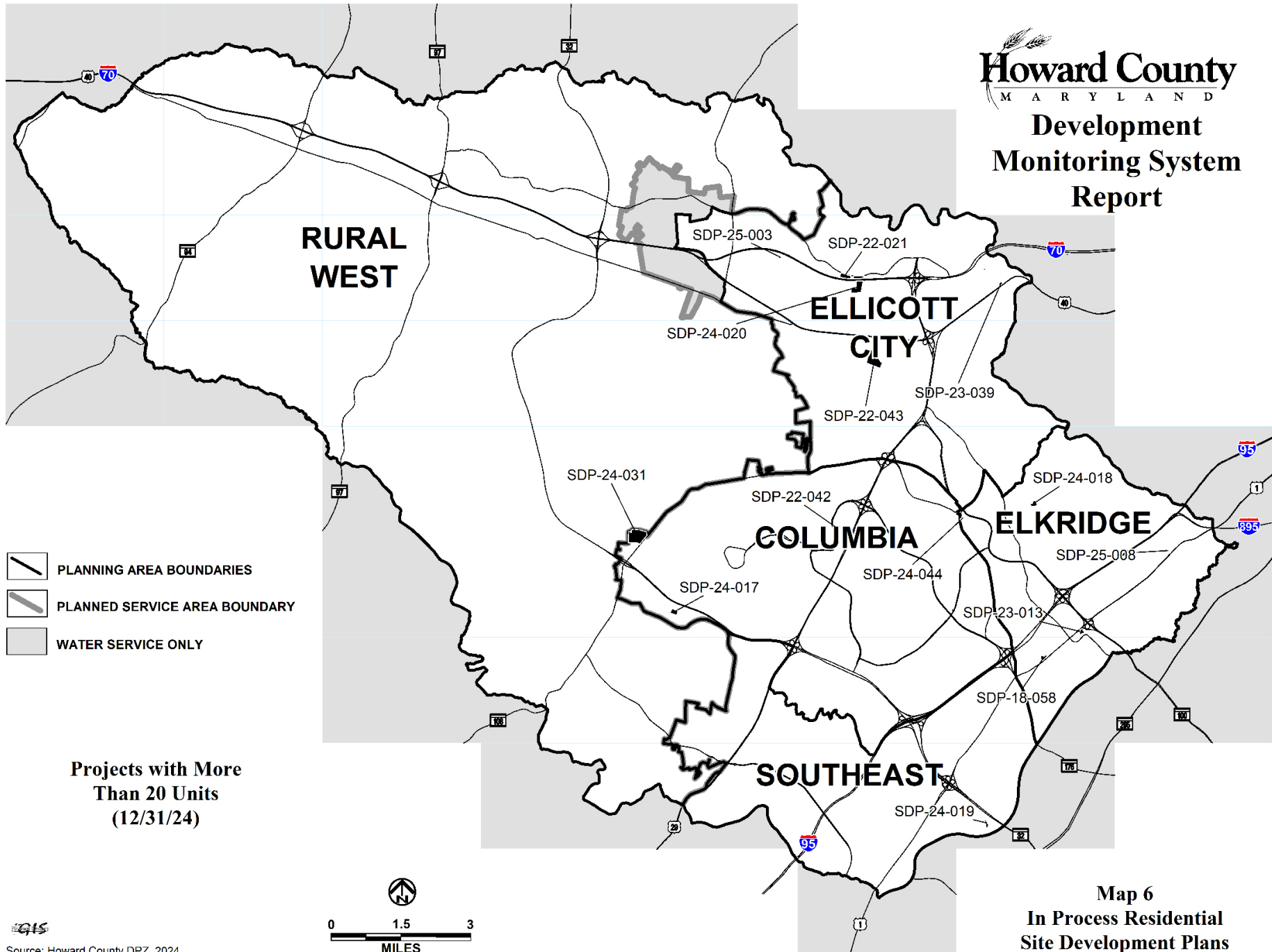
These large projects include the Lakefront North Phase 1 in Downtown Columbia; Erickson Oxford Hills Phase 1 and Trotter's Retreat in Columbia; O'Donnell Properties, Blue Stream Brompton 3, 5497 Waterloo Road, Elkridge Crossing II Section 4 Area 1, and Kerger Pond in Elkridge; Crestview at Taylor Highlands, Bethany Glen Age Restricted Adult Housing, That Place at Patapsco Park, and the Villages at Turf Valley in Ellicott City; and Corridor Road Apartments Station Overlook in the Southeast.

Table 25
Acreeage of Residential SDP's In Process, 12/31/24 & 12/31/23

Planning Area	2024	2023
Downtown Columbia	11	11
All Other Columbia	75	23
Elkridge	37	41
Ellicott City	66	83
Rural West	0	71
Southeast	17	23
TOTAL	206	252

Table 26
In Process Residential Site Development Plans, Projects With 20 or More Units, 12/31/24

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Downtown Columbia	SDP-22-042	Downtown Columbia - Lakefront North Phase 1	APT - 57 MIHU	701	701
Columbia	SDP-24-031	Erickson - Oxford Hills - Ph. 1	APT - Age Restricted - 28 MIHU	252	277
	SDP-24-017	Trotter's Retreat	SFD - Age Restricted	25	
Elkridge	SDP-23-013	O'Donnell Properties	APT - 43 MIHU	286	559
	SDP-18-058	Blue Stream - Brompton 3	SFA - 20 MIHU	107	
	SDP-24-044	5497 Waterloo Road	APT - Age Restricted - 10 MIHU	95	
	SDP-25-008	Elkridge Crossing II, Section 4, Area 1	SFA - 7 MIHU	44	
	SDP-24-018	Kerger Pond	SFD - Age-Restricted	27	
Ellicott City	SDP-22-043	Crested View at Taylor Highlands	SFA, APT - 14 MIHU	257	505
	SDP-22-021, 24-020	Bethany Glen Age Restricted Adult Housing	SFD, SFA - Age Restricted	127	
	SDP-23-039	That Place at Patapsco Park	APT - Age Restricted - 9 MIHU	89	
	SDP-25-003	Villages at Turf Valley	APT	32	
Southeast	SDP-24-019	Corridor Road Apartments Station Overlook	APT - 27 MIHU	182	182
TOTAL					2,224



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

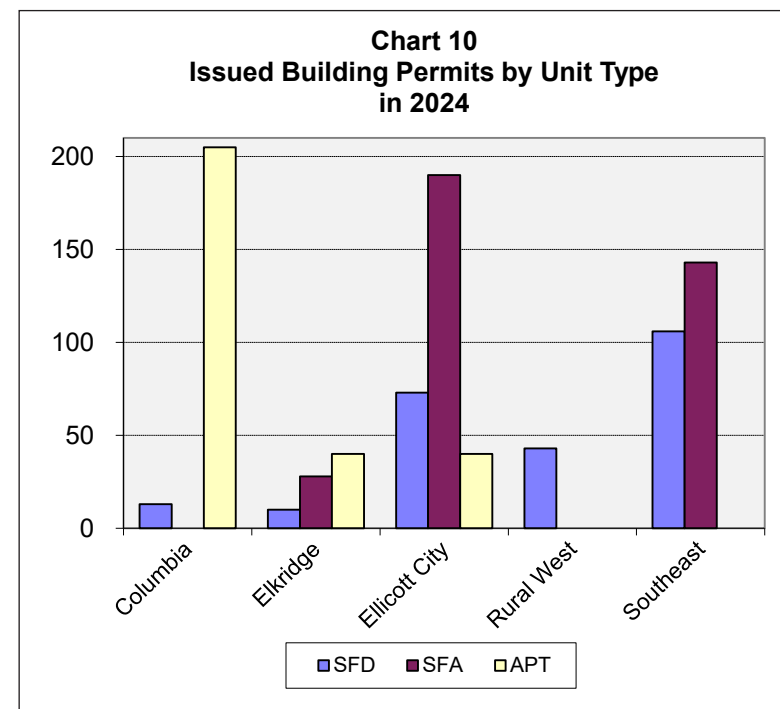
From January 1, 2024, to December 31, 2024, the County issued 891 residential building permits for new construction (Table 27). Ellicott City had the greatest number issued with 303, followed by the Southeast with 249, Columbia with 218, Elkridge with 78, and the Rural West with 43. Countywide, 27% of the permits were for single family detached units. About 41% were for single family attached units and 32% for apartment units. Chart 10 shows these results graphically by planning area.

Table 27
Issued Residential Building Permits by Unit Type in 2024

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
All Other Columbia	13	0	205	0	218	24%
Elkridge	10	28	40	0	78	9%
Ellicott City	73	190	40	0	303	34%
Rural West	43	0	0	0	43	5%
Southeast	106	143	0	0	249	28%
TOTAL	245	361	285	0	891	100%
PERCENT	27%	41%	32%	0%	100%	

Last Year's Projects - More Than 20 Units

Table 28 summarizes the issued residential building permits in larger developments with more than 20 units. About 89%, or 791 of the total 891 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 2020 to 2024, a total of 5,290 residential permits have been issued in Howard County (Table 29). This is an average of 1,058 permits per year. Last year's 891 issued permits was 12% more than the 795 permits issued the year before and the third greatest amount of the last five years.

Of the 5,290 total permits issued over the five-year time period, 1,657, or 31%, were for single family detached units. There were 1,681 permits (32%) for single family attached units and 1,952 permits (37%) for apartment units (both rental and condo). Chart 11 shows the results by unit type graphically over time.

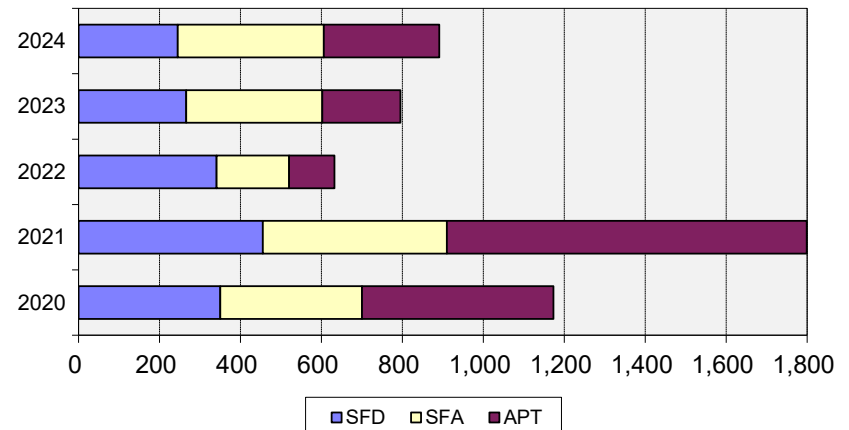
Table 28
Issued Residential Building Permits, Subdivisions With 20 or More Units in 2024

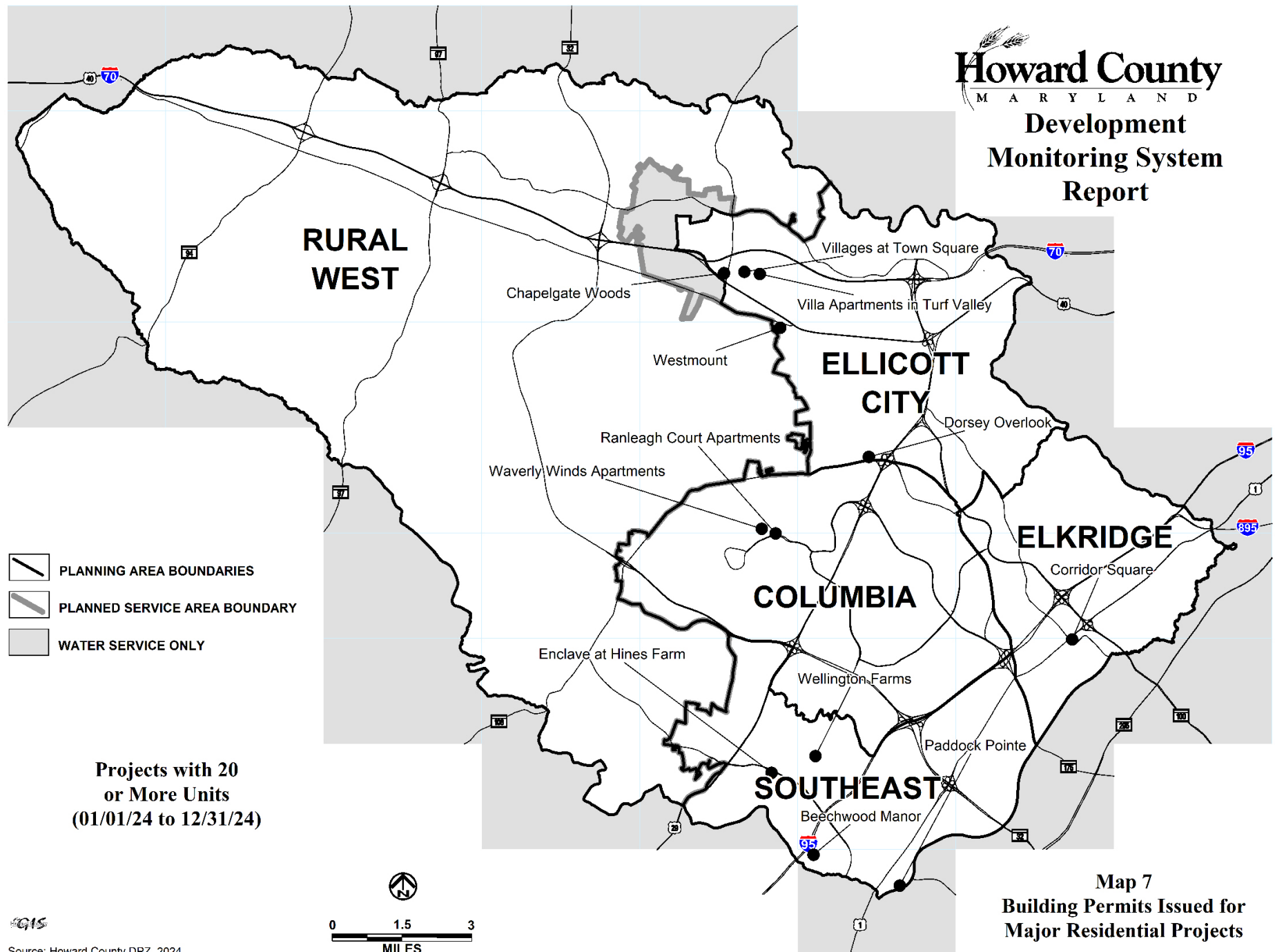
Planning Area	Subdivision	Unit Type	Units	TOTAL
Columbia	Waverly Winds Apartments	Apartments	123	205
	Ranleagh Court Apartments	Apartments	82	
Elkridge	Corridor Square	Single Family Attached	20	20
Ellicott City	Villa Apartments at Turf Valley	Apartments	80	327
	Chapelgate Woods	Single Family Attached	70	
	Villages at Town Square in Turf Valley	Single Family Attached	70	
	Dorsey Overlook	Single Family Attached	56	
	Westmount	Single Family Detached	51	
Southeast	Wellington Farms	Single Family Detached & Townhomes	111	239
	Paddock Pointe	Single Family Attached	70	
	Enclave at Hines Farm	Age Restricted Single Family Detached & Townhomes	30	
	Beechwood Manor	Single Family Detached & Townhomes	28	
TOTAL				791

Table 29
Issued Residential Building Permits by Unit Type, 2020 to 2024

Year	SFD	SFA	APT	MH	Total
2020	350	350	473	0	1,173
2021	455	455	889	0	1,799
2022	341	179	112	0	632
2023	266	336	193	0	795
2024	245	361	285	0	891
TOTAL	1,657	1,681	1,952	0	5,290
PERCENT	31%	32%	37%	0.0%	100%
ANNUAL AVG.	331	336	390	0	1,058

Chart 11
Issued Building Permits by Units
2020 to 2024





Issued Use and Occupancy Permits

Summary of Last Year

For the latest reporting period from January 1, 2024, to December 31, 2024, the County issued 1,381 use and occupancy permits (Table 30). Of all planning areas, Elkridge had the most with 559. This is followed by the Ellicott City with 394, the Southeast with 227, Columbia with 164, and the Rural West with 37. Countywide, 19% of the occupancy permits were for single family detached units, 27% were for single family attached units and 54% were for apartment units.

Table 30
Issued Use and Occupancy Permits by Unit Type in 2024

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0	0%
Columbia	11	0	153	0	164	12%
Elkridge	18	20	521	0	559	40%
Ellicott City	91	231	72	0	394	29%
Rural West	37	0	0	0	37	3%
Southeast	103	124	0	0	227	16%
TOTAL	260	375	746	0	1,381	100%
PERCENT	19%	27%	54%	0%	100%	

Five Year Results

From 2020 to 2024, a total of 6,165 use and occupancy permits were issued in Howard County (Table 31). This is an annual average of 1,233 permits per year.

Of the 6,165 total use and occupancy permits issued over the five-year timeframe, 27% were for single family detached units, 27% for single family attached units, and 46% for apartment units (both rental and condo). There were 11% more units built last year compared to the year before, 1,381 completions in 2024 compared to 1,381 in 2024. Chart 12 shows the results by unit type graphically over time.

Chart 12
Issued Use & Occupancy Permits by Unit Type
2020 to 2024

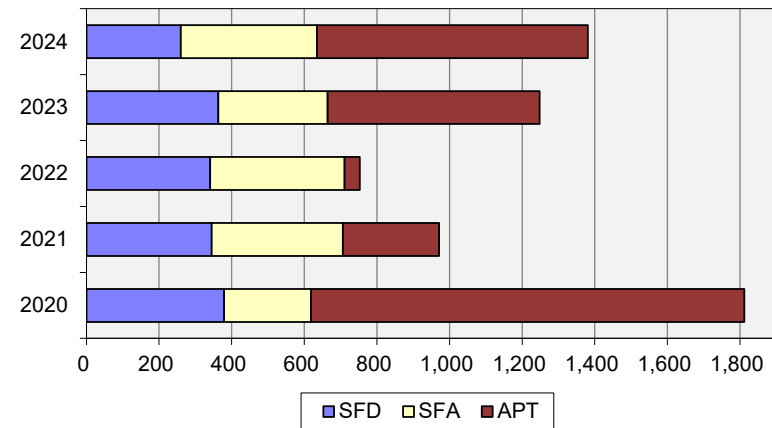


Table 31
Issued Use and Occupancy Permits by Unit Type, 2020 to 2024

Year	SFD	SFA	APT	MH	Total
2020	379	239	1,194	0	1,812
2021	345	361	265	0	971
2022	341	370	42	0	753
2023	363	301	584	0	1,248
2024	260	375	746	0	1,381
TOTAL	1,688	1,646	2,831	0	6,165
PERCENT	27%	27%	46%	0%	100%
ANNUAL AVG.	338	329	566	0	1,233

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, 2024, to December 31, 2024, as well as some comparisons to the previous year reporting period.

In-Process Plans

Table 32 shows the age-restricted units from in-process plans by unit type and by planning area as of December 31, 2024. This includes both subdivision and site development plans. During this latest time period there were 1,611 age-restricted units in process. These units are from seven projects—Erickson-Oxford Hills (1,200 apartment units), Elms at Elkridge (44 apartment units), That Place at Patapsco Park (89 apartment units), Bethany Glen (13 single family detached and 113 townhouse units), 5497 Waterloo Road (95 apartment units), Kerger Pond (27 single family detached units), Trotter's Retreat (25 single family detached units), and Turf Valley POR (4 townhouse units and one apartment unit). In 2023 there were 1,653 age-restricted units in process. Map 9 shows the 2024 projects.

Table 32
Age-Restricted Units from Plans in Process, 12/31/2024
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	25	0	1,200	1,225	76%
Elkridge	27	0	139	166	10%
Ellicott City	13	117	90	220	14%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	65	117	1,429	1,611	100%
PERCENT	4%	7%	89%	100%	
As of 12/31/23	130	147	1,376	1,653	

Table 33 shows the total MIHU units in process. These total 542, the greatest number of which are in Elkridge followed by the Southeast. This is about 17% less than the number in the previous year when there were 656 MIHU units in process.

Table 33
MIHU Units from Plans in Process, 12/31/2024
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia *	0	0	57	57	11%
All Other Columbia	0	0	120	120	22%
Elkridge	2	30	184	216	40%
Ellicott City	0	4	20	24	4%
Rural West	0	0	0	0	0%
Southeast	0	0	125	125	23%
TOTAL	2	34	506	542	89%
PERCENT	0%	6%	93%	100%	
As of 12/31/23	0	18	638	656	

* Includes very low and middle income units in accordance with the Downtown Columbia Plan.

Table 34 shows just the age-restricted MIHU units in process. For this year, 140 of the 542 MIHU units are age-restricted. There were 129 age-restricted MIHU units in process for the previous reporting period.

Map 8 shows the particular projects that include MIHU units. Table 38 shows the details of each of these projects.

Table 34
Age-Res. MIHU Units from Plans in Process, 12/31/2024
(with comparisons to the previous year)

Planning Area	SFD	SFA	APT	TOTAL	PERCENT
Downtown Columbia	0	0	0	0	0%
All Other Columbia	0	0	120	120	0%
Elkridge	0	0	10	10	0%
Ellicott City	0	0	10	10	0%
Rural West	0	0	0	0	0%
Southeast	0	0	0	0	0%
TOTAL	0	0	140	140	0%
PERCENT	0%	0%	0%	0%	0%

As of 12/31/23	0	0	129	129	
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Approved Site Development Plans

Table 35 shows the age-restricted units in site development plans that were approved between January 1, 2024, and December 31, 2024, with comparisons to the previous year. There were 141 approved age-restricted units in 2024 and none approved the previous year in 2023.

Table 36 shows the MIHU units in approved site development plans. A total of 103 units were approved—56 in Columbia and 44 in the Southeast. None of these units are age-restricted—shown in Table 37. This compares to 232 MIHU units approved in 2023. Map 9 shows the approved projects with MIHU units, and Table 39 shows the plan details.

Table 35
Age-Restricted Units from Approved Plans in 2024
(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	6	34	43	83	0%
Rural West	58	0	0	58	0%
Southeast	0	0	0	0	0%
TOTAL	64	34	43	141	0%
PERCENT	0%	0%	0%	0%	0%

Year 2023	0	0	0	0	
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Table 36
MIHU Units from Approved Plans in 2024
(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	56	56	54%
Elkridge	0	2	1	3	3%
Ellicott City	0	0	0	0	0%
Rural West	0	0	0	0	0%
Southeast	0	2	42	44	43%
TOTAL	0	4	99	103	100%
PERCENT	0%	4%	96%	100%	100%

Year 2023	0	28	204	232	
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* Includes very low and middle income units in accordance with the Downtown Columbia Plan.

Table 37
Age-Res. MIHU Units from Approved Plans in 2024
(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%	0%

Year 2023	0	0	0	0	
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Table 38
In Process Plans With MIHU and Age-Restricted Units On December 31, 2024

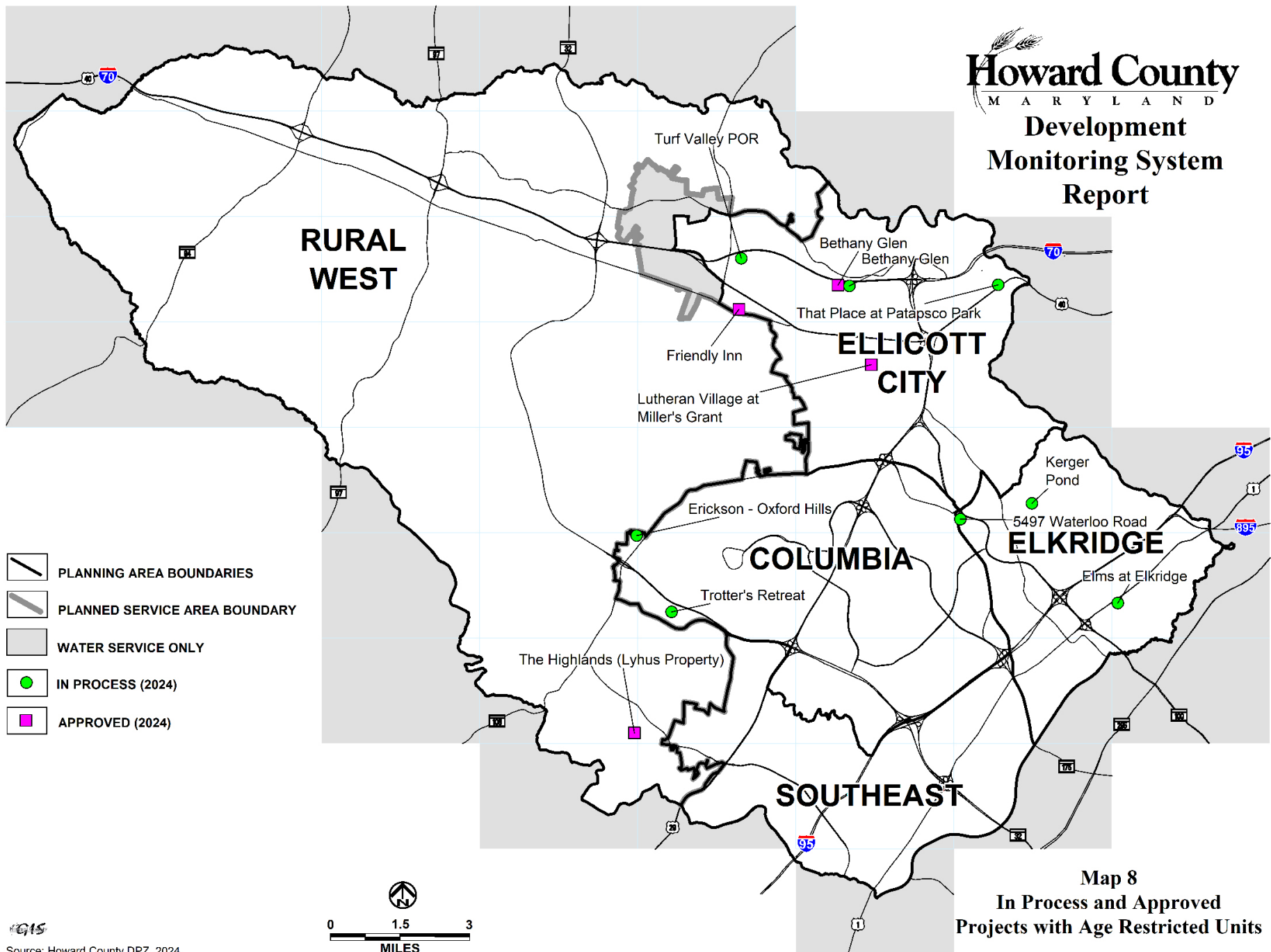
Plan Name	File Number	Zoning	MIHU Units												Market Rate			
			Not Age-Restricted				Age-Restricted				Total MIHU				Age-Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
10010 Junction Drive	S-23-004	TOD	0	0	98	98	0	0	0	0	0	0	98	98	0	0	0	0
Erickson - Oxford Hills	SP-23-001	CEF	0	0	0	0	0	0	92	92	0	0	92	92	0	0	856	856
Lakefront North - DT Columbia *	SDP-22-042	NT	0	0	57	57	0	0	0	0	0	0	57	57	0	0	0	0
Elms at Elkridge (Robert's Property)	SP-21-001	CEF	0	0	54	54	0	0	0	0	0	0	54	54	0	0	44	44
O'Donnell Properties	SDP-23-013	TOD	0	0	43	43	0	0	0	0	0	0	43	43	0	0	0	0
Weinman Apartments	S-23-002	CAC-CLI	0	0	39	39	0	0	0	0	0	0	39	39	0	0	0	0
Dorsey Business Center Parcel A	S-22-005	TOD	0	0	38	38	0	0	0	0	0	0	38	38	0	0	0	0
Erickson - Oxford Hills	SDP-24-031	CEF	0	0	0	0	0	0	28	28	0	0	28	28	0	0	224	224
Corridor Road Apartments Station Overlook	SDP-24-019	TOD	0	0	27	27	0	0	0	0	0	0	27	27	0	0	0	0
Brompton 3 (Blue Stream)	SDP-25-028	CAC	0	20	0	20	0	0	0	0	0	20	0	20	0	0	0	0
Crestview at Taylor Highlands	SDP-24-034	R-A-15	0	4	10	14	0	0	0	0	0	4	10	14	0	0	0	0
5497 Waterloo Road	SDP-24-044	POR	0	0	0	0	0	0	10	10	0	0	10	10	0	0	85	85
That Place at Patapsco Park	SDP-23-039	POR	0	0	0	0	0	0	9	9	0	0	9	9	0	0	80	80
Elkridge Crossing 2, Section 4, Area 1	SDP-25-008	CAC-CLI	0	7	0	7	0	0	0	0	0	7	0	7	0	0	0	0
Elkridge Crossing 2, Section 4, Area 2	SDP-25-014	CAC-CLI	0	3	7	10	0	0	0	0	0	3	0	3	0	0	0	0
Harwood Park	SDP-24-016	R-12	2	0	0	2	0	0	0	0	2	0	0	2	0	0	0	0
Turf Valley POR	SP-24-004	POR	0	0	0	0	0	0	1	1	0	0	1	1	0	4	0	4
Trotter's Retreat	SDP-24-017	R-20	0	0	0	0	0	0	0	0	0	0	0	0	25	0	0	25
Kerger Pond	SDP-24-018	R-20	0	0	0	0	0	0	0	0	0	0	0	0	27	0	0	27
Bethany Glen	SDP-24-020	R-20	0	0	0	0	0	0	0	0	0	0	0	0	13	75	0	88
Bethany Glen	SDP-22-021	R-20	0	0	0	0	0	0	0	0	0	0	0	0	0	38	0	38
TOTAL			2	34	373	409	0	0	140	140	2	34	506	542	65	117	1,289	1,471

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

Table 39
Approved Site Development Plans with MIHU and Age-Restricted Units in 2024

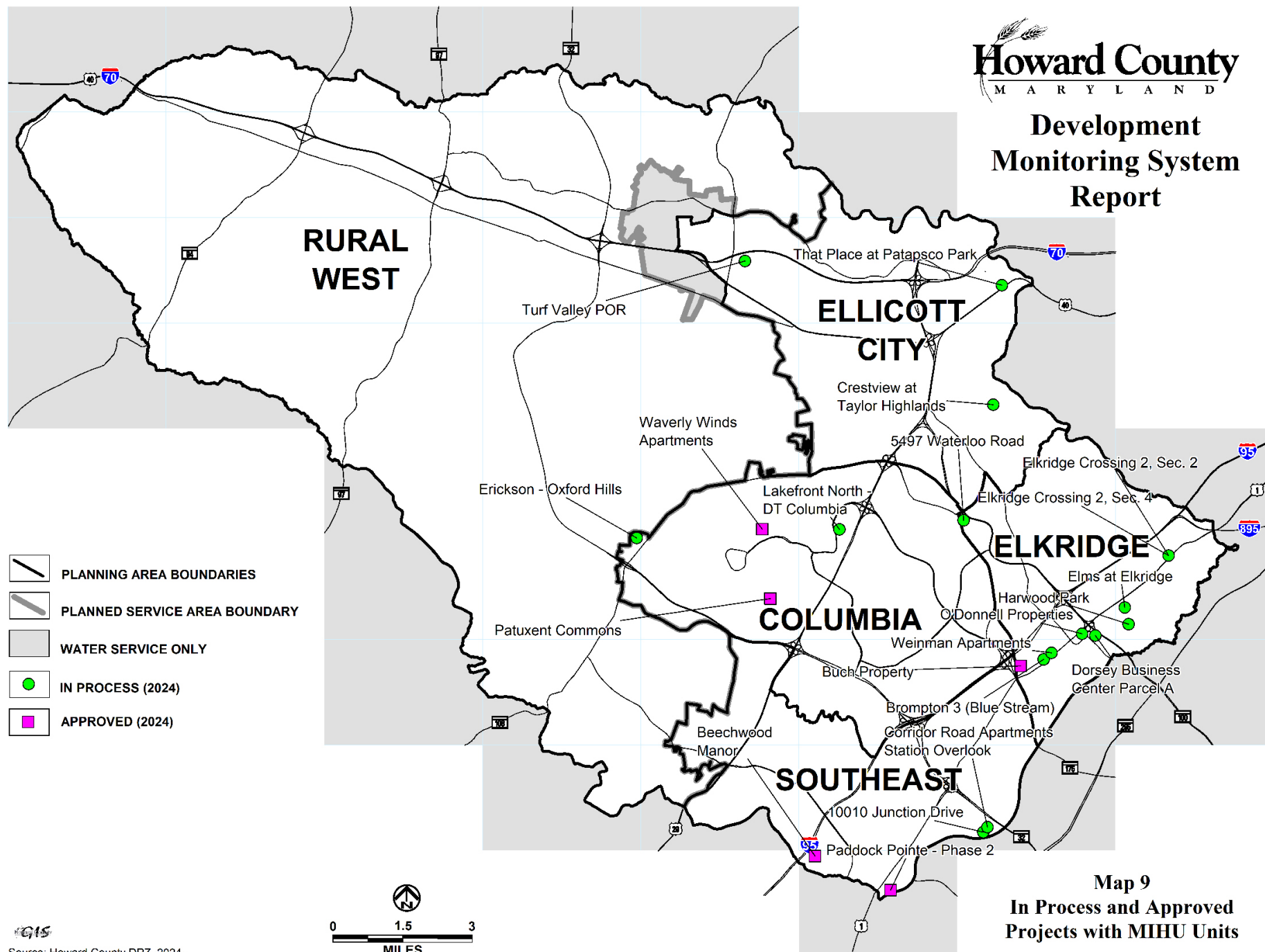
Plan Name	File Number	Zoning	MIHU Units												Market Rate			
			Not Age-Restricted				Age-Restricted				Total MIHU				Age-Restricted Units			
			SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total	SFD	SFA	APT	Total
Paddock Pointe - Phase 2	SDP-15-063	TOD	0	0	42	42	0	0	0	0	0	0	42	42	0	0	0	0
Putuxent Commons *	SDP-23-026	POR	0	0	31	31	0	0	0	0	0	0	31	31	0	0	0	0
Waverly Winds Apartments *	SDP-23-045	NT	0	0	25	25	0	0	0	0	0	0	25	25	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
Beechwood Manor	SDP-23-047	R-SC	0	2	0	2	0	0	0	0	0	2	0	2	0	0	0	0
The Highlands (Lyhus Property)	SDP-23-018	RR-DEO	0	0	0	0	0	0	0	0	0	0	0	0	58	0	0	58
Lutheran Village at Miller's Grant	SDP-22-043	PSC	0	0	0	0	0	0	0	0	0	0	0	0	0	0	43	43
Bethany Glen	SDP-24-015	R-20	0	0	0	0	0	0	0	0	0	0	0	0	6	22	0	28
Friendly Inn	SDP-23-038	B-1	0	0	0	0	0	0	0	0	0	0	0	0	0	12	0	12
TOTAL			0	4	99	103	0	0	0	0	0	4	99	103	64	34	43	141

* Low Income Housing Tax Credit Project.





Development Monitoring System Report



Map 9
In Process and Approved
Projects with MIHU Units

Use & Occupancy Permits

Table 40 summarizes the use and occupancy permits issued by unit type for age-restricted units. Between January 1, 2024, and December 31, 2024, 55 age-restricted units were built, 4% of the total 1,381 housing units built in the County over this latest reporting period.

There were 9 more age-restricted units built in the current reporting period compared to the previous period when there were 46 units built. The 2024 annual amount of 55 units built is the fifth smallest number built since 2004, the time when legislation was adopted enabling increased opportunities to build age-restricted units.

The 2005 DMS was the first time age-restricted units were reported. This was soon after the time the County had adopted regulatory changes enabling more of these types of units. In the last 20 years, 14% of all new homes built in Howard County have been age-restricted. This is summarized in Table 41.

Table 40
Age-Restricted Units Built in 2024

(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	18	37	0	55	100%
TOTAL	18	37	0	55	100%
PERCENT	33%	67%	0%	100%	

Year 2023	2	44	0	46	
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Table 41
Age-Restricted Units Built Compared to Total Units, 10/01/04 to 12/31/24

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%
1/20 to 12/20	0	0	32	32	1,812	2%
1/21 to 12/21	0	8	32	40	971	4%
1/22 to 12/22	0	15	0	15	753	2%
1/23 to 12/23	2	44	0	46	1,248	4%
1/24 to 12/24	18	37	0	55	1,381	4%
TOTAL	379	1,427	2,170	3,976	29,247	14%
PERCENT	10%	36%	55%	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 4 lots in 4 non-residential subdivision plans were recorded totaling 10 acres (Table 42). It should be noted that these may be resubdivisions that do not create new lots, but simply create new easements. Also, some may be parcel consolidations where the net number of lots get reduced.

Table 42
Recorded Non-Residential Subdivisions in 2024

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	2	50%	2	50%	3	33%
Elkridge	0	0%	0	0%	0	0%
Ellicott City	0	0%	0	0%	0	0%
Rural West	0	0%	0	0%	0	0%
Southeast	2	50%	2	50%	7	67%
TOTAL	4	100%	4	100%	10	100%

Table 43 shows the recorded non-residential subdivisions from January 1, 2020 to December 31, 2024. Over this five-year period there were 81 non-residential lots recorded Countywide in 53 subdivision plans totaling 774 acres. This amounts to an annual average over the five-year analysis time period of 16 lots in 11 plans encompassing 155 acres.

Table 43
Recorded Non-Residential Subdivisions, 2020 to 2024

Countywide	Lots	Plans	Acreage
2020	22	11	334
2021	19	13	170
2022	22	13	182
2023	14	12	78
2024	4	4	10
TOTAL	81	53	774
ANNUAL AVG.	16	11	155

In-Process Plans

Countywide, there were 25 non-residential subdivision plans in process as of December 31, 2024. This compares to 19 plans in process for the previous reporting period (Table 44). Seven plans were in Elkridge and the Southeast, 6 plans in Columbia, 3 plans in Ellicott City, 2 plans in the Rural West, and no plans in Downtown Columbia. All of the plans were in either the final plan or environmental concept plan stage.

Table 45 shows the number of potential non-residential lots in process. As of December 31, 2024, there were 6 lots in process, compared to 2 in process on December 31, 2023. These include resubdivisions for the purpose of adding roadways or easements and only represent net new lots.

There was a total of 28 non-residential acres in the subdivision process as of December 31, 2024 (Table 46). This compares to 7 acres in process one year earlier. For the current year the greatest acreage amount is in Columbia (23 acres). This is followed by 5 acres in Columbia.

Table 44
Number of Non-Residential Plans in Process, 12/31/24
with Comparisons to 12/31/2023 Countywide Totals

Region	Environmental Concept	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL PLANS
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	4	0	0	0	2	6
Elkridge	7	0	0	0	0	7
Ellicott City	3	0	0	0	0	3
Rural West	2	0	0	0	0	2
Southeast	6	0	0	0	1	7
TOTAL	22	0	0	0	3	25
12/31/23 Total	17	0	0	0	2	19

Table 45
Non-Residential Lots from Subdivision Plans in Process, 12/31/2024
with Comparisons to 12/31/2023 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL LOTS
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	0	5	5
Elkridge	0	0	0	0	0
Ellicott City	0	0	0	0	0
Rural West	0	0	0	0	0
Southeast	0	0	0	1	1
TOTAL	0	0	0	6	6
12/31/23 Total	0	0	0	2	2

Table 46
Acreage of Non-Residential Subdivision Plans in Process, 12/31/2024
with Comparisons to 12/31/2023 Countywide Totals

Region	Sketch	Preliminary Equivalent Sketch	Preliminary	Final	TOTAL ACRES
Downtown Columbia	0	0	0	0	0
All Other Columbia	0	0	0	23	23
Elkridge	0	0	0	0	0
Ellicott City	0	0	0	0	0
Rural West	0	0	0	0	0
Southeast	0	0	0	5	5
TOTAL	0	0	0	28	28
12/31/23 Total	0	0	0	7	7

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, a total of 330,615 square feet were approved in 17 site development plans on 303 acres (Table 47). The greatest amount of square footage approved was in the Southeast, followed by Elkridge, Columbia, the Rural West, and a small amount in Ellicott City.

Table 48 shows the approved square footage by building type. A total of 266,000 square feet, about 81% of the total, are for government and institutional uses located in the Southeast and Columbia. About 34,110 square feet, 10% of the total, is for office/service space, most of which is in Elkridge. Manufacturing/extensive industrial uses total 13,270 square feet, all located in the Southeast. Total retail uses amount to 11,735 square feet, about 4% of the total. About 5,500 square feet are for other uses. Chart 13 shows this graphically.

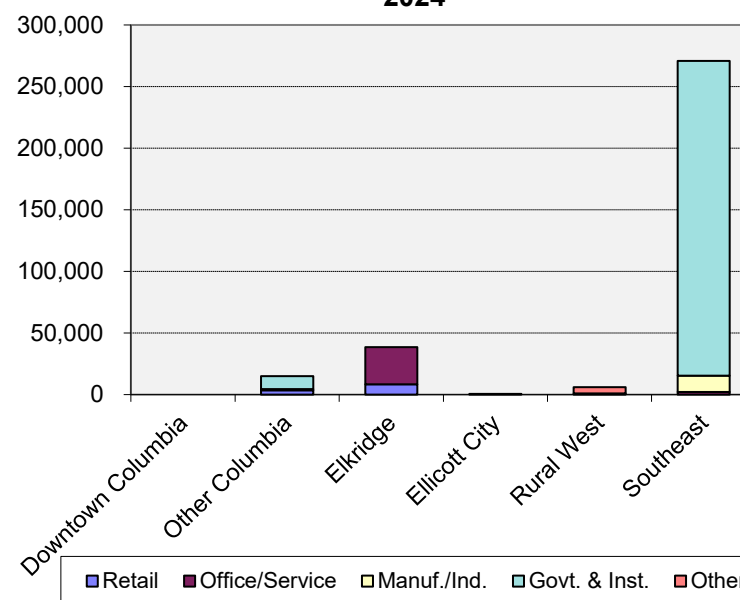
Table 47
Approved Non-Residential Site Development Plans in 2024

Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	0	0%	0	0%	0	0%
All Other Columbia	14,893	5%	3	18%	5	2%
Elkridge	38,524	12%	4	24%	6	2%
Ellicott City	500	0%	2	12%	3	1%
Rural West	5,880	2%	4	24%	269	89%
Southeast	270,818	82%	4	24%	21	7%
TOTAL	330,615	100%	17	100%	303	100%

Table 48
Building Square Feet in Approved Non-Residential Site Development Plans in 2024

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	0	0	0	0	0	0
All Other Columbia	3,381	980	0	10,532	0	14,893
Elkridge	8,354	30,170	0	0	0	38,524
Ellicott City	0	0	0	0	500	500
Rural West	0	880	0	0	5,000	5,880
Southeast	0	2,080	13,270	255,468	0	270,818
TOTAL	11,735	34,110	13,270	266,000	5,500	330,615
PERCENT	3.5%	10.3%	4.0%	80.5%	1.7%	100.0%

Chart 13
Sq. Ft. in Approved Site Development Plans 2024



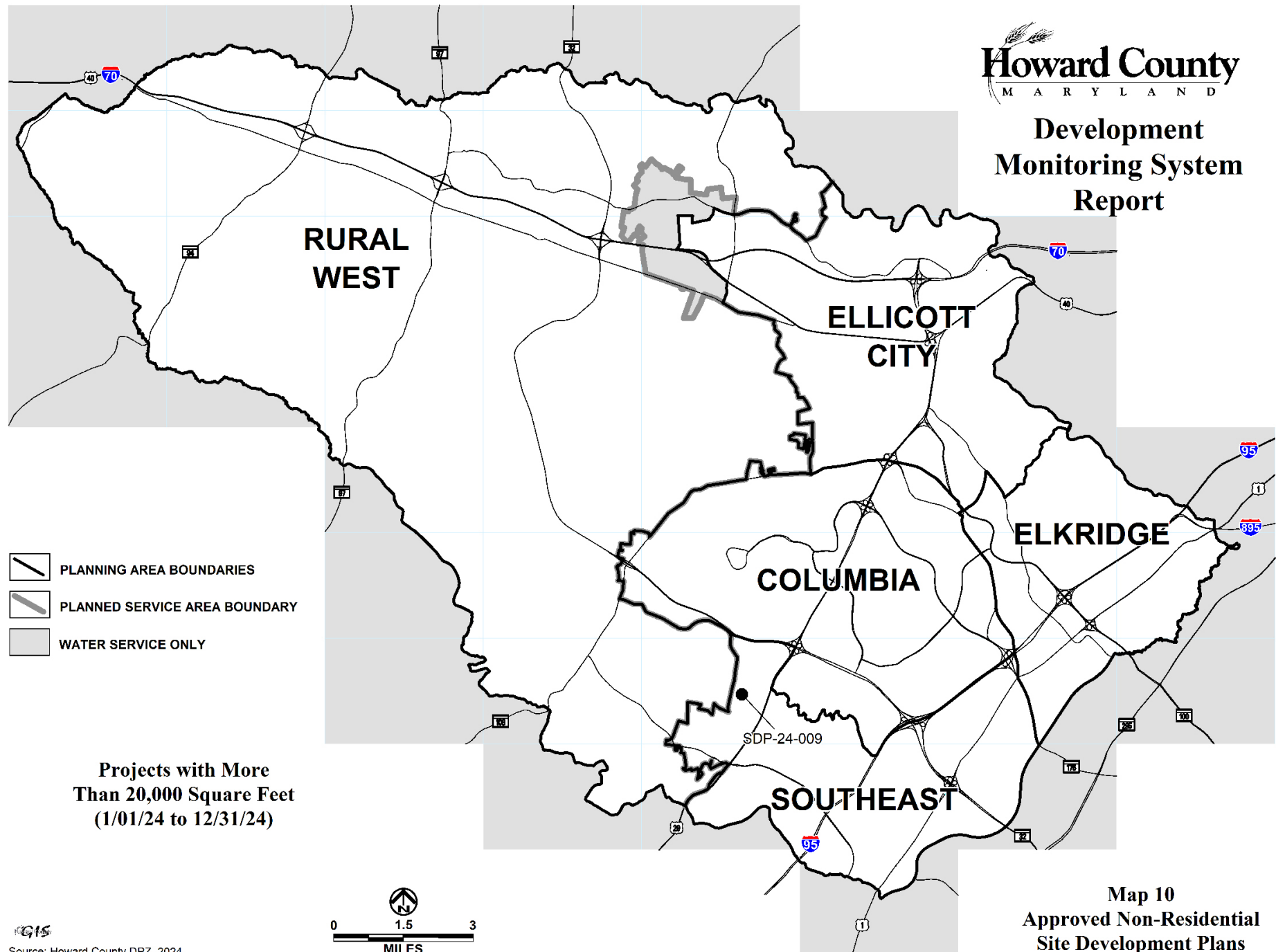
Last Year’s Projects - Greater than 20,000 Square Feet

Of the 330,615 square feet of non-residential building space approved in site development plans last year, one plan had more than 20,000 square feet. This larger plan is shown in Table 49. The locations of this plan are shown on Map 10.

This larger plan, located in the Southeast planning area, is for a 253,500 office/assembly/storage facility at Johns Hopkins University Applied Physics Lab.

Table 49
Projects With More Than 20,000 Square Feet in Approved Non-Residential Site Development Plans in 2024

Region	File Number	Plan Name	Use	Building Area	TOTAL
Southeast	SDP-24-009	Johns Hopkins University APL	Office/Assembly/Storage	253,500	253,500
TOTAL					253,500



Five Year Results

Table 50 shows the Countywide approved non-residential site development plans for the last five reporting periods from January 1, 2020 to December 31, 2024. Over this five year timeframe there were 81 plans approved on 1,395 acres including about 2.4 million square feet of building space. This equates to an annual average of about 481,700 square feet of new building space approved per year.

Last year, with about 330,615 square feet of approved space, was less than the 455,749 square feet approved the year before, and is the smallest of all five years. Chart 14 depicts these annual amounts.

Table 51 shows the five-year history by building type. Over the five years, about 41% of the total 2.4 million square feet was for government and institutional uses and 34% for manufacturing/extensive industrial uses. About 22% was for office/service uses, 4% for retail uses and less than 1% for other uses.

Table 50
Approved Non-Residential Site Development Plans
2020 to 2024

Year	Square Feet	Number or Plans	Acreage
2020	617,250	15	126
2021	667,779	18	375
2022	337,135	17	256
2023	455,749	14	335
2024	330,615	17	303
TOTAL	2,408,528	81	1,395
ANNUAL AVG.	481,706	16	279

Chart 14
Sq. Ft. in Approved Site Development Plans
2020 to 2024

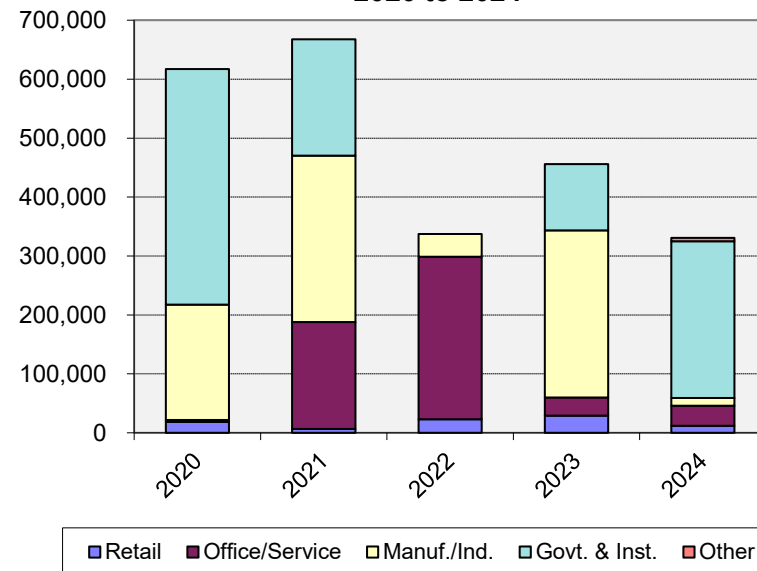


Table 51
Building Square Feet in Approved Non-Residential Site Development Plans
2020 to 2024

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2020	18,385	3,266	196,013	399,586	0	617,250
2021	6,756	180,973	282,364	197,686	0	667,779
2022	23,135	275,400	38,600	0	0	337,135
2023	28,988	30,784	283,497	112,480	0	455,749
2024	11,735	34,110	13,270	266,000	5,500	330,615
TOTAL	88,999	524,533	813,744	975,752	5,500	2,408,528
PERCENT	3.7%	21.8%	33.8%	40.5%	0.2%	100.0%

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of December 31, 2024, are tabulated and compared with those in process a year earlier.

In Process Plans

Countywide, there were 36 non-residential site development plans in process as of December 31, 2024. These plans include about 430,500 square feet of building space covering 348 acres. This compares to about 630,200 square feet in 35 plans on 385 acres that were in process the previous year (on December 31, 2023).

As shown in Table 52, the Ellicott City had the most square footage in process, followed by Elkridge and then the Southeast. Table 53 shows a more detailed breakdown of square footage by building type. About 179,000 square feet are for manufacturing/extensive industrial uses, 152,600 square feet for government and institutional uses, 46,500 square feet for office/service uses, and 44,900 square feet for retail uses.

Projects 20,000 Square Feet or More

Table 54 shows site development plans with buildings 20,000 square feet or more. Map 11 shows the locations of these projects. These projects account for about 71% of the total 430,500 square feet in process.

Table 52
In-Process Non-Residential Site Development Plans, 12/31/24
with Comparisons to Countywide In-Process on 12/31/23

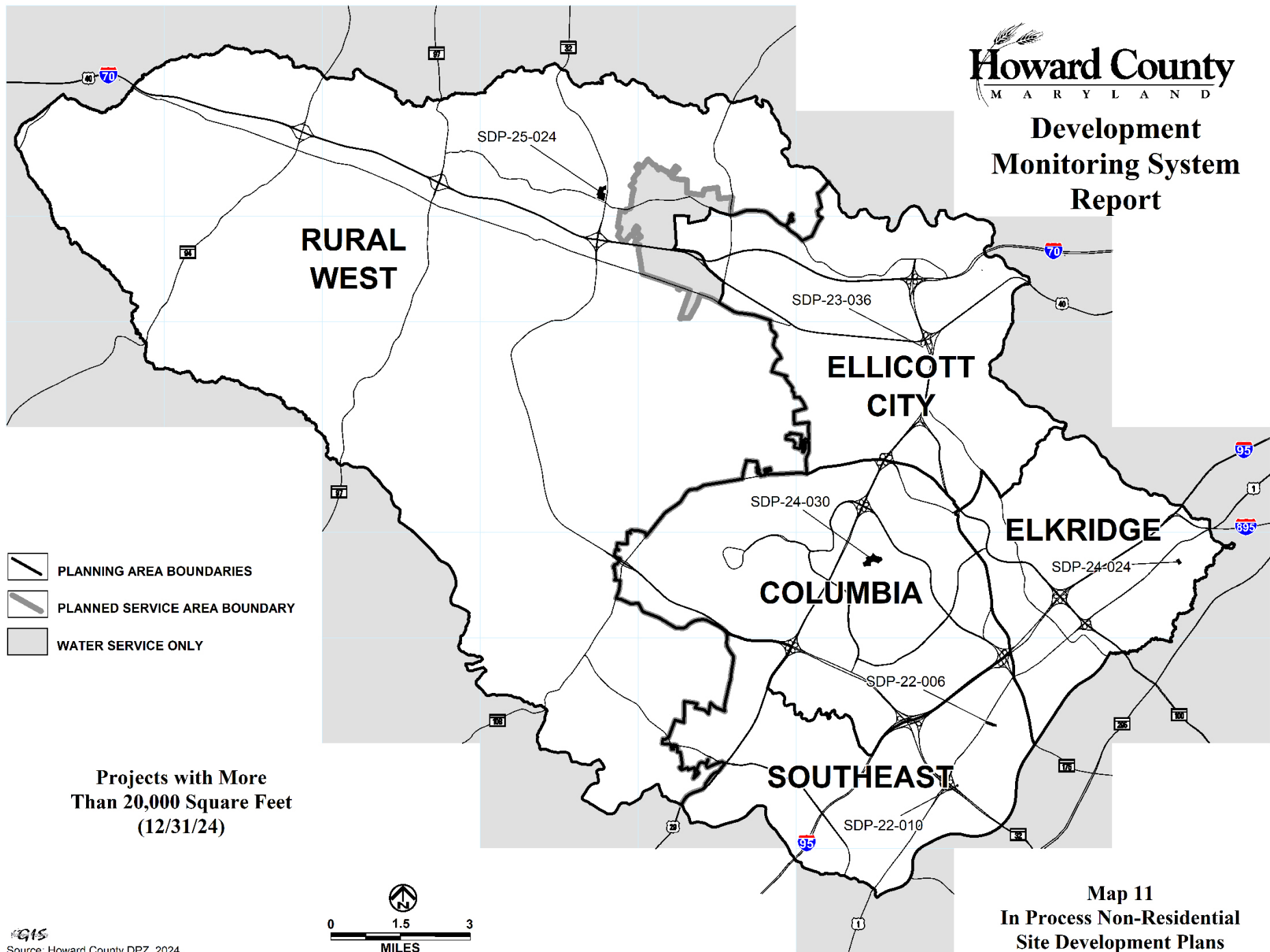
Region	Square Feet		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Downtown Columbia	19,013	4%	1	3%	11	3%
All Other Columbia	59,461	14%	8	22%	111	32%
Elkridge	73,297	17%	3	8%	17	5%
Ellicott City	151,701	35%	6	17%	10	3%
Rural West	54,706	13%	11	31%	172	49%
Southeast	72,282	17%	7	19%	27	8%
TOTAL	430,460	100%	36	100%	348	100%
12/31/2023	630,211		35		365	

Table 53
Building Square Feet in In-Process Site Development Plans, 12/31/24
with Comparisons to Countywide In-Process on 12/31/23

Region	Retail	Office/	Manuf./	Govt.	Other	TOTAL
		Service	Ext. Ind.	& Inst.		
Downtown Columbia	19,013	0	0	0	0	19,013
All Other Columbia	15,443	0	0	44,018	0	59,461
Elkridge	0	8,812	0	64,485	0	73,297
Ellicott City	9,708	6,273	135,720	0	0	151,701
Rural West	767	19,418	0	29,621	4,900	54,706
Southeast	0	11,955	43,302	14,500	2,525	72,282
TOTAL	44,931	46,458	179,022	152,624	7,425	430,460
PERCENT	10.4%	10.8%	41.6%	35.5%	1.7%	100.0%
12/31/2023	58,759	98,660	192,292	280,500	0	630,211

Table 54
Projects With 20,000 of More Square Feet in In-Process Non-Residential Site Development Plans, 12/31/24

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-24-030	Oakland Mills Middle School	School Addition	37,718	37,718
Elkridge	SDP-24-024	Maryland International School	School Addition	64,485	64,485
Ellicott City	SDP-23-036	Public Storage	Self-Storage Building	135,720	135,720
Rural West	SDP-25-024	Holy Korean Martyrs	Church	24,175	24,175
Southeast	SDP-22-006	Life Storage	Self-Storage Building	23,302	43,302
	SDP-22-010	Drenner Contrete	Warehouse	20,000	
TOTAL					305,400



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, 2024, to December 31, 2024, 21 permits were issued for about 538,000 square feet in non-residential building space (Table 55). The greatest amount of square footage was in the Southeast, followed by Columbia, and then Elkridge.

Table 55
Issued Non-Residential Building Permits in 2024

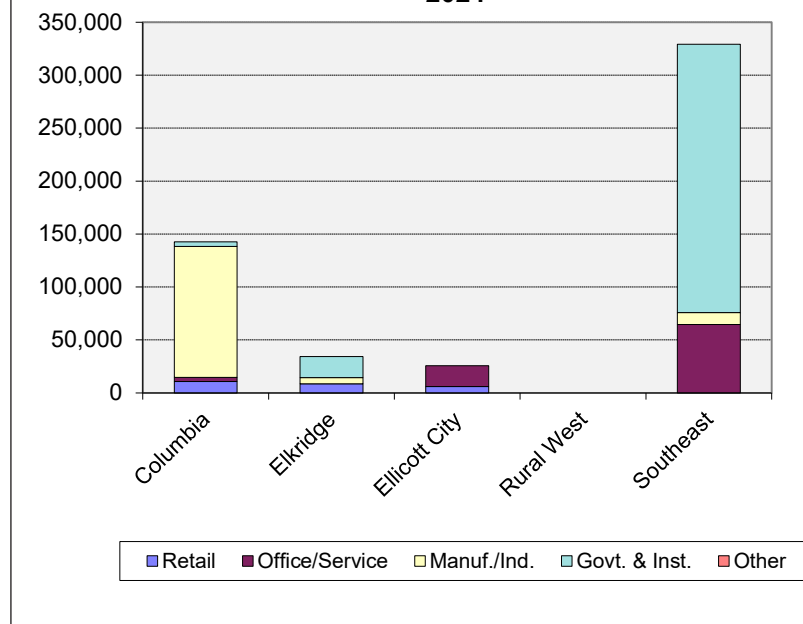
Region	Square Feet		Permits Issued	
	Number	Percent	Number	Percent
Downtown Columbia	6,098	1%	1	5%
Columbia	142,607	27%	7	33%
Elkridge	34,309	6%	5	24%
Ellicott City	25,717	5%	2	10%
Rural West	0	0%	0	0%
Southeast	329,265	61%	6	29%
TOTAL	537,996	100%	21	100%

Table 56 shows the approved square footage by building type. About 278,000 square feet, 52% of the total, are for government and institutional uses, most all of which is in the Southeast. Another 26%, about 141,000 square feet, are for manufacturing/extensive industrial uses. About 16% of the total, or 88,000 square feet, are for office/service uses, and a little more than 31,000 square feet, 6%, are for retail uses. Chart 15 shows this breakdown graphically by Planning Area.

Table 56
Building Square Feet in Issued Non-Residential Building Permits in 2024

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
Downtown Columbia	6,098	0	0	0	0	6,098
Columbia	10,629	4,035	123,513	4,430	0	142,607
Elkridge	8,504	0	5,934	19,871	0	34,309
Ellicott City	6,033	19,684	0	0	0	25,717
Rural West	0	0	0	0	0	0
Southeast	0	64,456	11,309	253,500	0	329,265
TOTAL	31,264	88,175	140,756	277,801	0	537,996
PERCENT	5.8%	16.4%	26.2%	51.6%	0.0%	100.0%

Chart 15
Sq. Ft. in Issued Building Permits
2024



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

Of the 538,000 total square feet of non-residential building space in issued permits over the current reporting period, a little over 485,000 square feet, 90% of the total, were in projects larger than 10,000 square feet. These larger buildings are shown in Table 57. The locations of these buildings are shown on Map 12.

The largest non-residential construction project last year was for a new 253,500 square foot office and laboratory building at the Johns Hopkins Applied Physics Lab in the Southeast. Also in the Southeast, two new office buildings were permitted in Maple Lawn and also a small office/warehouse building for Sunbelt Rentals.

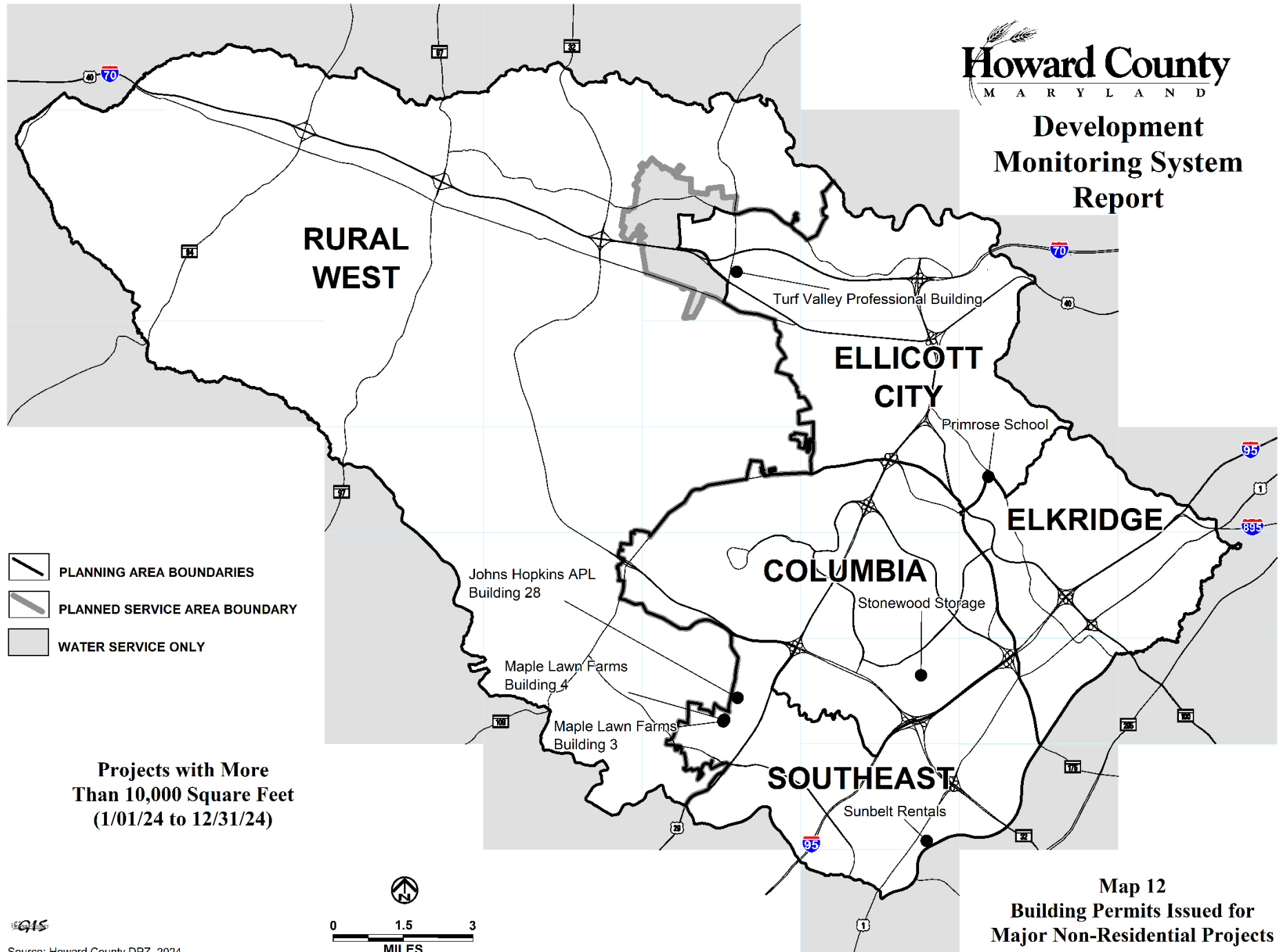
In Columbia, a permit was issued for a new 123,000 square foot storage building, Stonewood Storage.

A new 20,000 square foot office/service building was permitted for construction for a veterinarian hospital at part of the Turf Valley community in Ellicott City.

A new daycare center, Primrose School, was permitted to begin construction in ElkrIDGE.

Table 57
Building Permits Issued for Major Non-Residential Projects With More Than 10,000 Square Feet in 2024

Region	Name	Proposed Use	Square Feet	TOTAL
Columbia	Stonewood Storage	Storage Building	123,513	123,513
ElkrIDGE	Primrose School	Daycare Center	13,631	13,631
Ellicott City	Turf Valley Professional Building	Veterinary Hospital	19,684	19,684
Southeast	Johns Hopkins APL Building 28	Office & Laboratory Building	253,500	328,476
	Maple Lawn Building 3	Office Building	37,212	
	Maple Lawn Building 4	Office Building	27,244	
	Sunbelt Rentals	Office/Warehouse Building	10,520	
TOTAL				485,304



Five Year Results

Table 58 shows issued non-residential building permits Countywide for the last five reporting periods from 2020 to 2024. Over this five-year time-frame there were 175 permits issued for about 3.2 million square feet of building space. This equates to an annual average of about 640,000 square feet per year.

As summarized in Table 58, the latest reporting period for 2024, with 538,000 square feet in issued permits, is the fourth smallest amount permitted in the last five years but significantly more than the 372,000 square feet permitted the year before.

Table 59 shows the five-year history by building type. Over the five years, 39% of the total 3.2 million square feet was for manufacturing/extensive industrial uses. Another 33% was for government and institutional uses, 20% for office/service space, 8% for retail space, and less than 1% for other uses. Chart 16 shows this five-year history graphically.

Table 58
Issued Non-Residential Building Permits
2020 to 2024

Year	Square Feet	Number of Permits
2020	868,213	52
2021	839,613	35
2022	582,244	35
2023	371,739	32
2024	537,996	21
TOTAL	3,199,805	175
ANNUAL AVG.	639,961	35

Chart 16
Sq. Ft. in Issued Building Permits
2020 to 2024

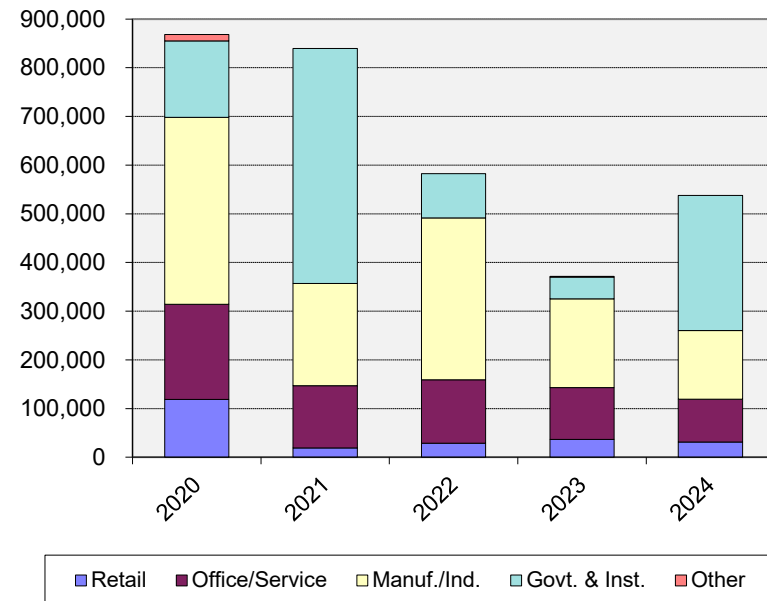


Table 59
Building Square Feet in Issued Non-Residential Building Permits
2020 to 2024

Year	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Other	TOTAL
2020	118,916	195,143	384,074	156,777	13,303	868,213
2021	18,991	128,199	209,931	482,492	0	839,613
2022	28,889	130,381	332,308	90,666	0	582,244
2023	36,634	106,383	182,594	44,328	1,800	371,739
2024	31,264	88,175	140,756	277,801	0	537,996
TOTAL	234,694	648,281	1,249,663	1,052,064	15,103	3,199,805
PERCENT	7.3%	20.3%	39.1%	32.9%	0.5%	100.0%

Employment Estimates

New job potential has been estimated based on the standard square feet per employee factors shown in Table 60. These factors are multiplied by the square footage of planned building space which is included on approved site development plans and building permits.

Table 60
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 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, 2024, to December 31, 2024, could accommodate an estimated 711 employees (Table 61). About 75% of the potential jobs are located in the Southeast. About 20% of the potential jobs are located in Elkridge, and about 5% of the total Countywide potential jobs are located in the Columbia.

Countywide, 532 potential jobs, about 75% of the total 711 jobs associated with approved site development plans, are government and institutional jobs. Another 136 are office/service jobs (19%), 29 are retail jobs (4%) and 13 are manufacturing/extensive industrial jobs (2%).

Table 61
Potential Employment from Approved Non-Residential SDP's in 2024
By Use Category

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	TOTAL	PERCENT
Columbia	8	4	0	21	33	5%
Elkridge	21	121	0	0	142	20%
Ellicott City	0	0	0	0	0	0%
Rural West	0	4	0	0	4	0%
Southeast	0	8	13	511	533	75%
TOTAL	29	136	13	532	711	100%
PERCENT	4.1%	19.2%	1.9%	74.8%	100.0%	

Job Potential from Issued Building Permits

As shown in Table 62 below, there is a potential for 1,127 new jobs that could be accommodated based on issued building permits. About 49% of the total are potential government and institutional jobs, most all in the Southeast. This is followed by 31% office/service jobs. 12% manufacturing/extensive industrial jobs, and 7% retail jobs.

Table 62
Potential Employment from Issued Building Permits in 2024
By Use Category

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	TOTAL	PERCENT
Columbia	42	16	124	9	190	17%
Elkridge	21	0	6	40	67	6%
Ellicott City	15	79	0	0	94	8%
Rural West	0	0	0	0	0	0%
Southeast	0	258	11	507	776	69%
TOTAL	78	353	141	556	1,127	100%
PERCENT	6.9%	31.3%	12.5%	49.3%	100.0%	

MD Department of Labor Employment Estimates

The previous sections estimate potential employment from new development. This section provides an overview of estimated employment changes as reported by the Maryland Department of Labor. 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.

The Maryland Department of Labor reports statistics produced by the 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.

Table 63 shows the jobs for the most recent reporting period compared to the previous year. From 2023 to 2024 the State reports an increase of 1,810 jobs in Howard County, from 167,591 jobs in 2023 to 169,401 jobs in 2024. It is expected that job totals in Howard County will continue to recover from the significant job losses during the recent pandemic, although it is unclear when the job total will be back at the pre-pandemic level of close to 174,400 at the beginning of 2020.

Table 63 also shows the average weekly wages by job type as reported by the Maryland Department of Labor for the 1st quarter 2024. In the 1st quarter of 2024, the Department of Labor reported that the 169,401 wage and salary jobs in Howard County had an average weekly wage of \$1,731. This is a 4.03% increase compared to the previous year when weekly wages averaged \$1,664.

Table 63
Jobs and Weekly Wages by Industry, 2023 and 2024

Job Type	2023		2024	
	Jobs	Wages	Jobs	Wages
Government Sector				
Federal Government	1,514	\$2,186	2,116	\$2,604
State Government	1,759	\$1,666	1,800	ND
Local Government	14,812	\$1,420	14,690	ND
Subtotal/Average	18,085	\$1,508	18,606	\$1,631
Goods Producing				
Natural Resources and Mining	294	\$1,130	276	\$877
Construction	11,185	\$1,718	11,245	\$1,707
Manufacturing	7,387	\$1,765	6,875	\$1,906
Subtotal/Average	18,866	\$1,727	18,396	\$1,769
Service Providing				
Trade, Transportation, and Utilities	33,655	\$1,438	33,610	\$1,448
Information	3,217	\$3,846	2,990	\$4,625
Financial Activities	8,176	\$2,353	7,849	\$2,643
Professional and Business Services	47,374	\$2,195	47,232	\$2,303
Education and Health Services	19,531	\$1,181	21,129	\$1,186
Leisure and Hospitality	14,529	\$530	15,093	\$548
Other Services	4,158	\$1,023	4,496	\$1,094
Subtotal/Average	130,640	\$1,676	132,399	\$1,740
TOTAL	167,591	\$1,664	169,401	\$1,731

Source: State Department of Labor (1st quarter). Weekly wages. ND: Not Disclosable

Land Preservation

The County's General Plan, *HoCo By Design*, adopted in October 2023, calls for the annual tracking of open space and preservation easements in Howard County. This section summarizes all parks and open space land and preservation easements acquired in 2024 by type. The cumulative total of all acres preserved by type countywide is also summarized.

Open space land is generally recorded as part of subdivision activity in the County. This includes Homeowners Association (HOA) and Recreation and Parks open space land acquired by the County as required under the Zoning and Subdivision and Land Development regulations. Open space and parkland may also be acquired directly by deed when subdivision of land does not occur. The County purchases park land for active and passive uses and for land preservation to fulfill goals outlined in *HoCo By Design* and the *Land Preservation Parks and Recreation Plan*.

Dedicated preservation easements are recorded as part of subdivision activity in the County, particularly in the Rural West where the RR and RC zoning incentivises the preservation of land through density and cluster exchange options (DEO/CEO). Preservations easements allow the original land owner to maintain ownership of the land while preventing future development to take place. There are generally two main types of dedicated preservation easements, agricultural and environmental. Both types are created through the subdivision process, and like open space, can also be created when the subdivision of land does not occur, for example, when a private conservation group acquires an easement for the purposes of land preservation. Agricultural preservation easements are also preserved through the County's Agricultural Land Preservation Program (ALPP) purchase program, where the County acquires future development rights of farmland in the Rural West. The State of Maryland may also purchase easements for land preservation purpose through various programs.

Parks & Open Space Land Acquired in 2024

Table 64 shows the recorded and deeded parks and open space land in 2024 by Planning Area. A total of 162 acres of new parks and open space land were acquired. The greatest amount, 98 acres, was added in the Rural West for the new Howard County Public Gardens. About 61 acres were acquired in Ellicott City, most of which is HOA and passive park land in the new Bethany Glen Age-Restricted community. HOA and passive park land was also acquired in the Lacey Property subdivision. In the Southeast there were 3 acres of HOA land recorded in the Beechwood Manor subdivision, and a small amount (0.25 acres) of open space recorded in Elkridge as part of the Abbeyfield Estates subdivision.

Table 64
Recorded and Deeded Parks and Open Space in 2024

Region	Date	Name	Type	Tax Map	Parcel	Zone	Acres	Total
Elkridge	10/4/2024	Abbeyfield Estates	County Park & Open Space	31	206	R-20	0.25	0.25
Ellicott City	1/22/2024	NC-3 Flood Facility	County Park & Open Space	25	60	R-ED	7.38	
	5/20/2024	Horvath Property	County Park & Open Space	18	38	R-20	1.30	
	7/15/2024	Lacey Property	HOA Open Space	25	7	R-ED	0.28	
	7/15/2024	Lacey Property	HOA Open Space	25	7	R-ED	0.59	
	7/15/2024	Lacey Property	HOA Open Space	25	7	R-ED	4.06	
	7/15/2024	Lacey Property	County Park & Open Space	25	7	R-ED	0.35	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	8.09	
	12/13/2024	Bethany Glen - ARAH	County Park & Open Space	17	34	R-20	7.43	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	3.24	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	1.91	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	1.62	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	0.79	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	0.52	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	1.14	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	1.73	
	12/13/2024	Bethany Glen - ARAH	County Park & Open Space	17	34	R-20	2.41	
	12/13/2024	Bethany Glen - ARAH	HOA Open Space	17	34	R-20	7.13	
	12/13/2024	Bethany Glen - ARAH	County Park & Open Space	17	34	R-20	10.93	
	12/13/2024	Bethany Glen - ARAH	County Park & Open Space	17	34	R-20	0.20	61.10
Rural West	11/15/2024	Howard County Public Gardens	County Park & Open Space	14 & 21	74	RC-DEO	97.59	97.59
Southeast	2/26/2024	Beechwood Manor	HOA Open Space	50	1	R-SC	0.15	
	2/26/2024	Beechwood Manor	HOA Open Space	50	1	R-SC	2.14	
	2/26/2024	Beechwood Manor	HOA Open Space	50	1	R-SC	0.78	3.08
TOTAL								162.02

Land Preservation Easements

Agricultural Land Preservation

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

Agricultural land preservation in the County first began in 1979 using the State's easement purchase program, known as the Maryland Agricultural Land Preservation Foundation (MALPF). The County instituted its own easement purchase program, indicated above, in 1984 and until 1988 both

the State and County programs were active in preserving farmland. In 1989 the County initiated the innovative Installment Purchase Agreement (IPA) program to purchase easements. The IPA program has been very successful attracting many new farmers to the County program.

Farmland may also be preserved in the ALPP through the dedication of preservation parcels as part of the development process in the RC and RR zoning districts, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/ CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

Environmental Land Preservation

Parcels may also be preserved in the Rural West through the development process as environmental preservation parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. There must be two easement holders for environmental preservation parcels. The majority of the total dedicated preservation easements, are jointly held by Howard County and various homeowner's associations. Other joint easement holders on environmental land include the Howard County Conservancy and other conservancy organizations.

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

Environmental land can also be preserved by land conservation organizations such as the Howard County Conservancy, the Maryland Environmental Trust, and other land trust organizations. Easements are placed on the land by these organizations for the purposes of environmental preservation.

New Preservation Easements Acquired in 2024

Table 65 shows all agricultural and environmental land preservation easements acquired in 2024 by Planning Area. A total of close to 97 acres were added, most of which was in the Rural West. This includes 56 acres added to the ALPP purchased easement program and a 19.6 acre dedicated agricultural preservation easement acquired through the subdivision process. There were also three environmental preservation easements added in the Rural West as part of the subdivision process totaling 13.2 acres. An 8 acre environmental conservation easement was acquired in Ellicott City.

Table 65
Recorded and Deeded Preservation Easements in 2024

Region	Date	Name	Type	Tax Map	Parcel	Zone	Acres	Total
Ellicott City	2/27/2024	North St Johns Swim Club	Conservation	17	502	R-20	8.0	8.0
Rural West	3/28/2024	Clarksville Crossing	Dedicated Environmental Preservation	34	301	RR-DEO	6.7	
	3/28/2024	Clarksville Crossing	Dedicated Environmental Preservation	34	301	RR-DEO	4.5	
	6/6/2024	Clarksville Crossing	Dedicated Environmental Preservation	34	301	RR-DEO	2.0	
	3/28/2024	Brokaw Property	Dedicated Agricultural Preservation (ALPP)	13	190	RC-DEO	19.6	
	4/16/2024	Winkler Property	Purchased Agricultural Preservation (ALPP)	7	118	RC-DEO	56.0	
TOTAL								96.8

Aggregate Total Open Space and Land Preservation

Table 66 summarizes the total acreage of preservation easements and parks and open space land in Howard County as of April 10, 2025.

A total of 16,156 acres of purchased easements have been preserved in the County's Agricultural Land Preservation Program (ALPP). An additional 3,044 acres have been dedicated to the ALPP through the subdivision process. MALPF easements total 4,036 acres and the MD Rural Legacy Program has 81.3 acres in Howard County. This results in a total of close to 23,318 acres of agricultural land preserved in Howard County.

About 9,165 acres of land are held as environmental easements acquired through the subdivision process. An additional 1,833 acres are held by the Maryland Environmental Land Trust and other private land trusts. About 74 acres are held in neighborhood preservation easements acquired through the subdivision process in eastern Howard County. The resulting total agricultural and environmental easements held in the County is 34,390 acres.

The parks and open space land shown in Table 66 include 10,237 acres of County parks and open space, 9,291 acres of State parkland as part of the Patapsco State Park, and 3,213 acres owned by the Washington Suburban Sanitary Commission along the Putuxent River. An additional 8,631 acres of Columbia and HOA open space is also permanently preserved. This results in a total of 31,371 acres of parks and open space land preserved in Howard County.

Total preserved agricultural and environmental easements and parks and open space land amount to 65,762 acres, about 40% of the total 162,000 acres of land in Howard County. Preserved land by category is shown Map 13.

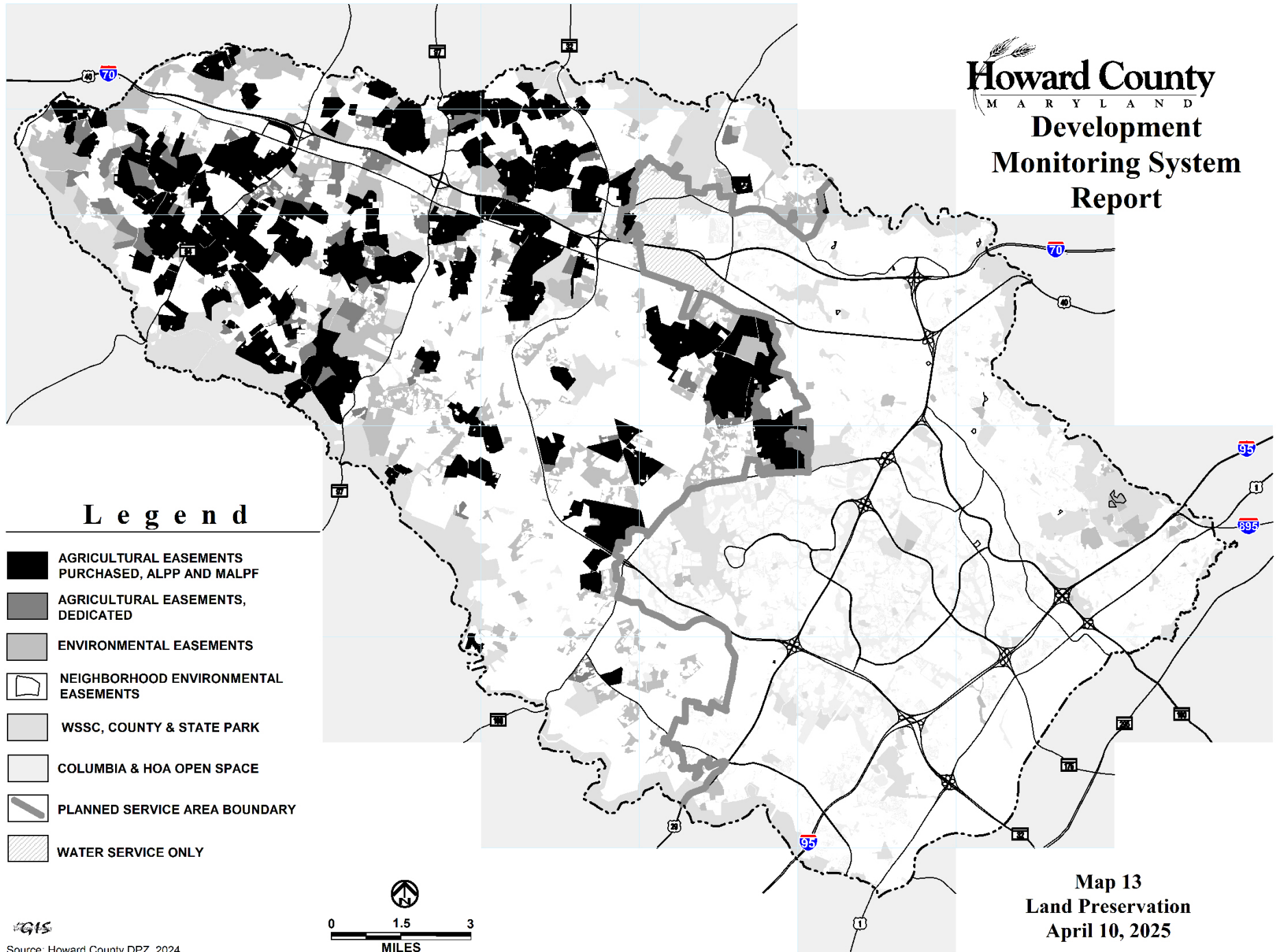
Land is also preserved in forest conservation easements as required as part of the subdivision process by State and County law. Many of the forest conservation easements are within parks, open space, and environmental and agricultural preserved land. For further details on forest conservation, please refer to the Department of Planning and Zoning's Forest Conservation report.

Table 66
Preservation Easements and Parks & Open Space
as of April 10, 2025

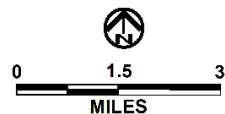
PRESERVATION EASEMENTS	Acres
Agricultural Preservation Easements	
Howard County Agricultural Land Preservation Program (ALPP), Purchased Easements	16,156.0
Howard County Agricultural Land Preservation Program (ALPP), Dedicated Easements	3,043.9
MD Agricultural Land Preservation Program (MALPF)	4,036.4
Total ALPP and MALPF	23,236.3
MD Rural Legacy Program	81.3
Total Agricultural Preservation Easements	23,317.6
Environmental Preservation Easements	
Environmental Preservation, Dedicated Easements	9,165.3
MD Environmental Trust & Other *	1,832.9
Neighborhood Preservation Easements	74.5
Total Environmental Easements	11,072.7
TOTAL PRESERVATION EASEMENTS	34,390.3
PARKS AND OPEN SPACE	Acres
County Parks & Open Space	10,236.9
State Parks	9,290.9
Washington Suburban Sanitary Commission	3,213.1
Columbia & HOA Open Space	8,630.6
TOTAL PARKS & OPEN SPACE	31,371.4
GRAND TOTAL PRESERVATION EASEMENTS AND PARKS & OPEN SPACE	65,761.7

* Includes HCC Purchased conservation easement pilot program

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



Source: Howard County DPZ, 2024.



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