

Amendment 23 to Council Bill No. 28 -2023

**BY: The Chairperson at the Request
of the County Executive**

**Legislative Day 11
Date: October 2, 2023**

Amendment No. 23

(This Amendment makes a technical correction to insert the date that the Market Research and Demand Forecast was published.)

- 1 In the *HoCo By Design* General Plan, attached to this Act as Exhibit A, amend the following
- 2 pages as indicated in this Amendment:
 - 3 • Chapter 2, Growth and Conservation Framework – page 10
 - 4
- 5 Correct all page numbers, numbering, and formatting within this Act to accommodate this
- 6 amendment.

Undeveloped, Unprotected Land

The wide distribution and relatively small size of undeveloped parcels in the County—approximately 2% of all land in the County—means there are limited opportunities to alter their intended impact on the landscape beyond what is planned under current zoning district assignments. Unless they are purchased or placed under easement for permanent preservation, it is likely that undeveloped land in the County will develop and look very similar to existing adjacent properties.

However, a significant amount of the undeveloped and unprotected land in the County remains undeveloped due to capacity constraints, including parcel shape and size, as well as environmental features, such as streams, wetlands, floodplains, and steep slopes. Given the higher proportion of environmental constraints on remaining undeveloped parcels, their potential for development will be limited.

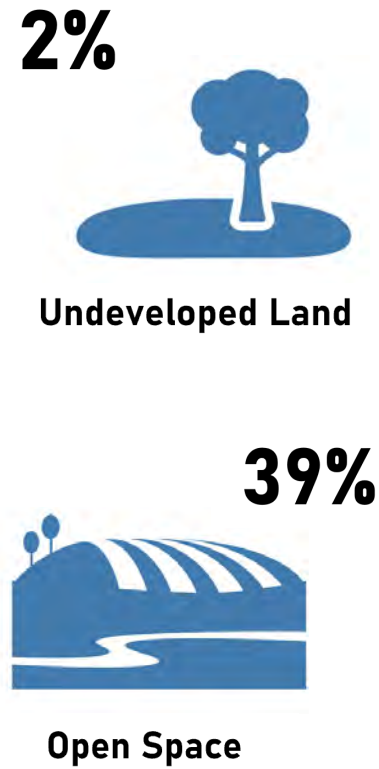
If fully developed, these parcels could accommodate 2,024 new dwelling units and 4,210 new employees. The project team considered the limited capacity of this undeveloped, unprotected land in crafting recommendations for the General Plan.

Land Preservation: Parkland, Open Space, and Farmland

Howard County has proactively preserved open space and farmland for decades. Today, about 39% of all land in the County is protected. Over half of this land is permanently preserved through environmental and agricultural preservation easements. The Agricultural Land Preservation Program has preserved over 23,000 acres of farmland through a combination of preservation easements purchased by the County, the dedication of agricultural preservation parcels as provided by the County's Zoning Regulations, and preservation easements purchased by the Maryland Agricultural Land Preservation Foundation. Over 9,000 acres of environmental preservation easements have been placed on land in the Rural West through the Zoning Regulations.

Additionally, about 25,000 acres of state, Washington Suburban Sanitary Commission (WSSC), and county parks and open space make up over a third of preserved land in the County. Columbia Association's 3,600 acres of open space comprises an additional 6% of preserved land in the County.

The General Plan retains all preserved parkland, open space, and easements in the County existing today, and presents opportunities for further conservation of environmental, agricultural, and open space land.



DEMAND FOR LAND: TWENTY YEAR MARKET POTENTIAL

Despite a limited supply of available undeveloped land, Howard County continues to see a high demand for residential and commercial growth. RCLCO Real Estate Advisors conducted a Market Research and Demand Forecast (the Forecast), [published on October 1, 2020](#), to inform HoCo By Design. The Forecast found that the County has reached an inflection point, whereby land constraints and affordability challenges could impact the ability to accommodate future residential and commercial growth. It also found that the economic vitality of the County is directly tied to its desirability as a place to live and work, which must be maintained over time. Most high-paying and fast-growing industries are booming either in response to population and job bases (like healthcare, education, and publishing), or as a result of national economic and industry trends (like technology, professional services, and food services). To sustain the economic growth that has been historically enjoyed and to maintain a competitive edge over other markets, the County must continue to invest in housing, infrastructure, placemaking, job creation, and other activities that make it a desirable place for people and employers to call home.

Market Demand Projections

The Forecast projected market-driven demand for new retail, office, industrial, residential, and hotel room space in the absence of land, regulation, or other constraints. It concluded that there is a strong market in Howard County for commercial uses, with potential to add up to 59,000 jobs between 2020 and 2040. Additionally, there is a future demand for 31,000 new homes to accommodate the 28,000 new households associated with that job growth (allowing for a vacancy factor). The Forecast also identified a current "pent up" demand for 20,000 more housing units, attributed to those who work in Howard County but live elsewhere in the region.



Source: RCLCO Market Research and Demand Forecast (2020)