

**Amendment 1 to Amendment 24
to Council Bill No. 28-2023**

BY: Deb Jung

**Legislative Day 12
Date: October 11, 2023**

*(This amendment removes the projected demand categories and removes the Green
Neighborhoods allocations found in Amendment 24.)*

- 1
- 2 Substitute the attached page GFC-12 of Amendment 24 with the attached GFC-12 attached to
- 3 this Amendment to Amendment.
- 4
- 5 Update the attached Housing Allocation chart to reflect the final Housing Allocation chart passed
- 6 in Chapter 10 of HoCo By Design.
- 7



Job Demand vs. Existing Capacity

There are 656 acres of undeveloped nonresidential land in Howard County (including land zoned for office, retail, flex, industrial, and warehouse uses) which could accommodate about 28,000 new jobs. Over 20 years, this equates to an average of 1,400 jobs per year. Over the last 10 years, the County gained about 3,000 new jobs per year, with much of this growth attributable to the most recent Base Realignment and Closure (BRAC) and the associated expansion of Fort Meade.

The 59,000 new jobs estimated in the Forecast represent an average annual addition of 2,950 new jobs per year over the next two decades. This growth is more than twice what could be accommodated within existing land use constraints. To meet this future demand, land use changes will need to occur in the County.

Housing Demand vs. Existing Capacity

The Forecast observed that the existing jobs-housing ratio in Howard County is much lower than in nearly every other nearby county. This has created a “pent up” demand of approximately 20,000 more households that would prefer to live in Howard County if options were available to them. Combined with the market demand of 31,000 units associated with projected job growth, there is housing demand for over 50,000 new housing units over the next 20 years.

The current estimated land use capacity for new housing in Howard County, as outlined in the various land use categories above, is only 15,200 units. This is far less than the 50,000-unit demand suggested by the Forecast. Land use changes will also need to occur in the County to accommodate this residential demand.

The findings in the Forecast establish what is possible—a ceiling—in terms of market demand. To determine the optimal growth targets HoCo By Design should assume, DPZ evaluated the findings against the General Plan’s vision, the FLUM, the timing and location of infrastructure, and budgetary factors.

FUTURE GROWTH POTENTIAL BY THE NUMBERS

PROJECTED DEMAND (2020-2040)	
RESIDENTIAL	EMPLOYMENT
31,000 units	59,000 jobs

Howard County has the potential to grow by 31,000 housing units and 59,000 jobs between 2020 – 2040.

HOCO BY DESIGN FUTURE DEVELOPMENT POTENTIAL (2020-2040)	
RESIDENTIAL	EMPLOYMENT
27,000 units	35,000 jobs

An estimated 27,000 total units may be built between 2020 and 2040 if the envisioned Future Land Use Map (FLUM) is implemented through the comprehensive re-zoning process and if market conditions allow for development.

RESIDENTIAL DEVELOPMENT PIPELINE AS OF SEPTEMBER 30, 2020	
Plan Review	3,966 units
Approved or Platted, with no building permit issued	2,377 units
Building permits issued	737 units
TOTAL	7,080 units

Units in the development pipeline are a part of the County’s future development potential from 2020-2040. Many of these units have already been granted housing allocations under the PlanHoward 2030 Housing Allocation Chart and are therefore expected to be built in the early years of the HoCo By Design planning horizon.

HOCO BY DESIGN APFO HOUSING ALLOCATION CHART (2026-2040)		
RESIDENTIAL	SET ASIDE INCENTIVES (Green Neighborhoods, Affordable Housing)	TOTAL
19,194 units (1,280 units/annual average)	4,500 units (300 units/annual average)	23,694 units (1,580 units/annual average)

The APFO housing allocation chart is the legal tool that is used to cap and pace residential growth that can be built annually in character areas identified on the Future Land Use Map (FLUM). See Chapter 10 for additional information about the APFO chart.

Up to 23,694 units could be built using HoCo By Design Housing Allocations between 2026 and 2040. Out of the 23,694 units, 4,500 units are set-aside specifically for the existing Green Neighborhoods and proposed affordable housing incentive programs.

****Growth potential for Gateway Regional Activity Center not included.**