

Amendment 71 to Council Bill No. 28 -2023

BY: Liz Walsh

Legislative Day 11

Date: 10/02/2023

Amendment No. 71

(This Amendment amends HoCo by Design by including the May 31, 2023, student enrollment and capacity utilization as noted below:

Chapter 8: Public School Facilities - Amends Table 8-1: HCPSS Official Capacity Utilization (2022) and adds source of data.)

1 In the *HoCo By Design* General Plan, attached to this Act as Exhibit A, amend the following
2 page as indicated in this Amendment:

- 3 • Chapter 8: Public School Facilities: 9 and insert 9.1 after page 9.
4

5 Correct all page numbers, numbering, and formatting within this Act to accommodate this
6 amendment.
7

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Am 71 CB 28-2023

passed on

10/11/2023

Michelle [Signature]
Council Administrator

Not Moved

School Capacity Utilization

HCPSS measures school capacity utilization by weighing student populations against a specific school's available space. The goal is to maintain a utilization rate between 90% and 100%. As per BOE policy, redistricting is considered if capacity utilizations are less than 90% or more than 110%. Capacity determinations for each school are revised periodically to reflect the realities of HCPSS' changing use of buildings, priorities, and educational norms. The annual APFO school capacity chart adopted by the County Council is based on the capacity utilization calculations.

In 2019, the BOE took proactive steps to address HCPSS' capacity issues by initiating a systemwide school boundary review, which revised the County's school attendance areas. The goals of the attendance area revisions were to balance school capacity utilization, provide relief to schools most impacted by overcrowding, and address inequities in the distribution of students participating in the Free and Reduced Meal Program. More recently, in November 2022 the BOE adopted new school boundaries to accommodate the County's newly built Guilford Park High School. As a result of the added capacity of the new high school and the recent boundary line adjustments, all high schools are projected to be under 110% capacity through 2030, with most of the 13 high schools projected to be around or below 100% capacity for the next 10 years.

For school year 2022-23, HCPSS elementary schools were utilized at close to 97% of capacity, with underutilized schools in the West balancing some of the high utilization rates at schools in the Central and Eastern areas. Middle schools were utilized at 98% and high school capacity utilization rates were over 105% countywide. This rate will be reduced with the opening of Guilford Park High School in 2023. The highest utilization for both middle and high school levels were in the Eastern and Northern schools. Table 8-1 shows these capacity utilization rates at each grade level. The capacities are from the June 2022 Feasibility Study. As discussed on page 17 of the Feasibility Study, the target capacity utilization range for schools is between 90 and 110%. Rates for each school are included in the study.

Table 8-1: HCPSS Official Capacity Utilization (2022)

Level	Capacity	9/30/2022 Enrollments	Capacity-Utilization
Elementary	25,457	24,575	96.5%
Middle	13,496	13,167	97.6%
High	17,206	18,362	106.7%
Total	56,159	56,104	99.9%

Source: Howard County Public School System, Office of School Planning

A number of projects have been approved for funding or are planned in the BOE's latest proposed FY24 capital budget that will add seats to increase capacity in the areas of high capacity utilization. When it opens in the fall of 2023, Guilford Park High School will add 1,658 high school seats in an area of the County with three high schools utilized at over 110%. The Oakland Mills Middle and Dunloggin Middle School renovation and addition projects will add 428 middle school seats. A renovation and addition is planned for Oakland Mills High School to add 400 seats, with an expected completion date of 2029. Further, a 289-seat addition at Hammond High School will be opening in the fall of 2023. Additional renovation and addition projects are planned with 2030 through 2032 completion dates. All of these projects will help to alleviate school crowding in certain areas of the County, based on projected enrollment growth.

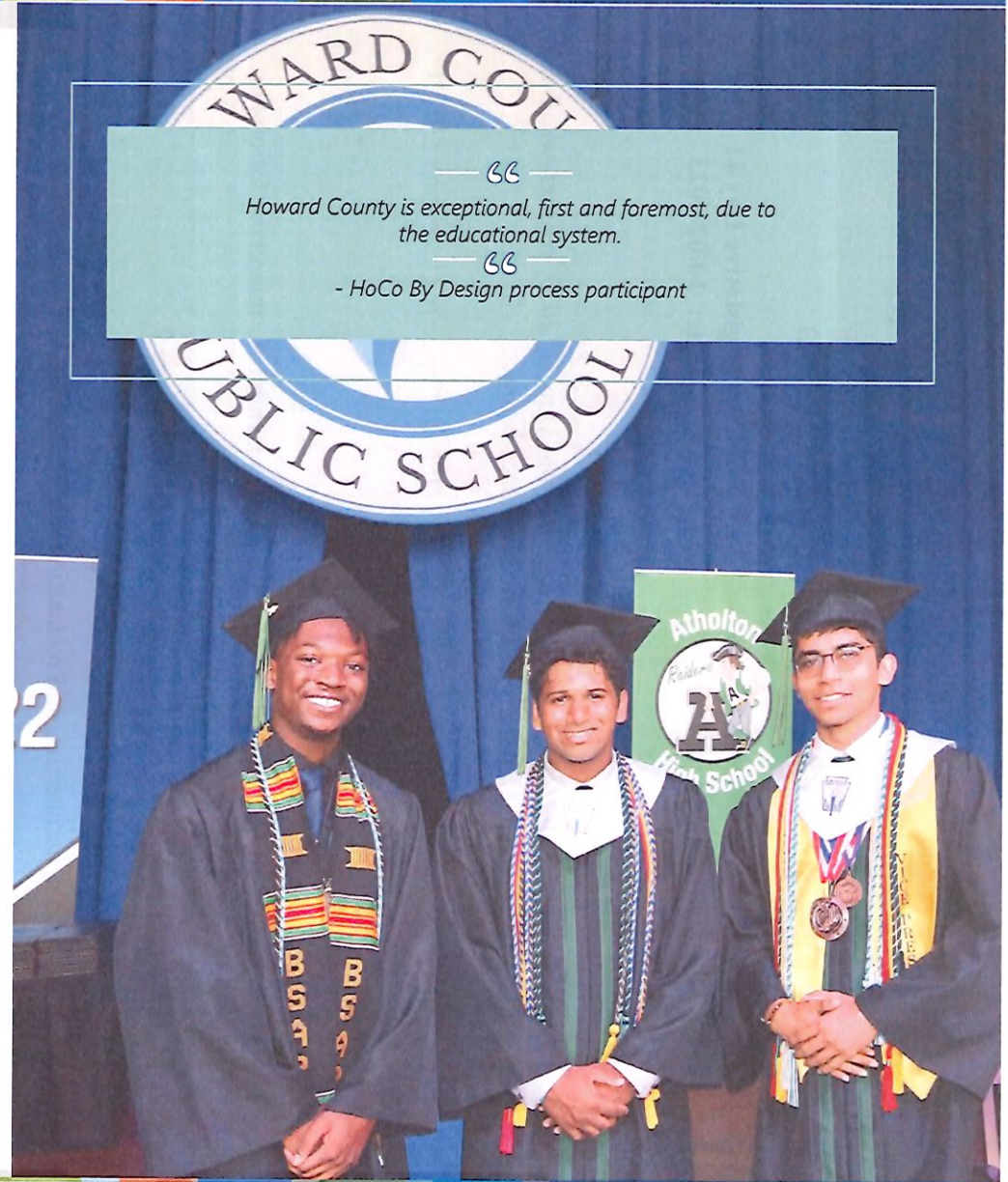


Table 8-1: HCPSS Official Capacity Utilization (2022)					
<u>Level</u>	<u>General Plan Capacity*</u>	<u>9/30/2022 Enrollments*</u>	<u>9/30/2022 Capacity Utilization*</u>	<u>5/31/2023 Enrollments**</u>	<u>Capacity Utilization</u>
Elementary	25,457	24,575	96.5%	26,514	104.2%
Middle	13,496	13,167	97.6%	13,162	97.5%
High	17,206	18,362	106.7%	18,276	106.2%
Total	56,159	56,104	99.9%	57,952	103.2%

**Source: Howard County Public School System, Office of School Planning*

***HCPSS Monthly Enrollment Report for May 31, 2023 (<https://www.hcpss.org/schools/enrollment-reports/>)*

Amendment 72 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 11

Date: 10/02/2023

Amendment No. 72

(This Amendment makes the following changes to HoCo by Design Chapters 8 and 11:

*Chapter 8: Public
School Facilities*

- *Removes all quotes;*
- *Amends the Adequate Public Facilities Ordinance (APFO) section by striking "most recently", referencing when elementary regions surpasses 105% utilization as a criteria to postpone development, and deletes the last sentence relating to the effect of delayed development on HCPSS planning to increase school capacity;*
- *Amends the first paragraph of the Sources of Student Growth subsection by adding two factors for the Office of School Planning to estimate enrollment growth;*
- *Amends the second paragraph of the Sources of Student Growth subsection by changing from six to eight the total number of components used by the Office of Student Planning to estimate enrollment projections;*
- *Amends the fourth paragraph of the Sources of Student Growth subsection by adding that "Although HCPSS may be able to project the future demand for school capacity, only the County and State have the authority to raise revenues for future school construction.";*
- *Deletes PS-1 Policy Statement Implementing Action 1 and renumbers Action 2 to Action 1;*
- *Amends the first sentence of the second paragraph of the Co-locating Facilities subsection by substituting "may" for "can", deletes language relating to the redevelopment of Gateway, and adds language relating to the future redevelopment of Gateway concerning the evaluation of school capacity and providing requisite school facilities;*
- *Deletes school buildings from the consideration of adaptive reuse of real estate in PS-3 Policy Statement Implementing Action 1; and*
- *Deletes the seventh paragraph of the Accommodating Future School Needs section relating to the impact of recent amendments to APFO that resulted in a stricter School Capacity Test.*

*Chapter 11:
Implementation*

- *Deletes PS-1 Policy Statement Implementing Action 1 and renumbers Action 2 to Action 1; and*

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10/11/2023

Council Administrator

- *Deletes school buildings from the consideration of adaptive reuse of real estate in PS-3 Policy Statement Implementing Action 1.)*

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 8: Public School Facilities: 8, 10, 11, 12, 18, 25, 26, and 28; and
4 • Chapter 11: Implementation: 51 and 52.

5
6 Correct all page numbers, numbering, and formatting within this Act to accommodate this
7 amendment.

8

Overview of Howard County Public School System Planning

Introduction

School-age children in Howard County attend public schools in the Howard County Public School System (HCPSS). HCPSS is governed by an independently-elected Board of Education (BOE), which consists of eight members and works collaboratively with the County Executive and County Council to develop and adopt HCPSS' operating and capital budgets. Decisions concerning school capacity and utilization, class size, attendance areas, new school construction, and facility maintenance and design are the purview of HCPSS and the BOE.

In 2023, there were 78 schools in Howard County, including 42 elementary schools, 20 middle schools, 13 high schools, and three education centers. There were 57,676 students enrolled in HCPSS schools for the 2022-2023 school year. The Covid-19 pandemic has resulted in a decrease in student enrollment in recent years, but student population growth is expected to rise annually and is stressing many Howard County schools.

Capital Budget and Long-Range Planning

Tied to the County's capital budget cycle, school planning in Howard County is an annual process that begins with the HCPSS Feasibility Study. This document provides a comprehensive review of school boundary options focused on capacity utilization targets, presents student enrollment projections and trends, and state and local capacities for each school, and develops capital improvement program strategies. This study is prepared by HCPSS' Office of School Planning and presented to the BOE each June. The Feasibility Study informs the HCPSS capital budget for the following fiscal year by providing detailed information on how many students are projected to attend each school in the system and recent attendance area changes. The projection horizon is over a 10-year period. The Feasibility Study is also used as the basis for the following year's Adequate Public Facilities Ordinance (APFO) school capacity chart that is presented to the BOE and adopted by the County Council each July.



Adequate Public Facilities Ordinance (APFO)

Howard County has had an Adequate Public Facilities Ordinance (APFO) in place for decades. APFO was **most-recently** amended in 2018 to impose stricter controls for pacing growth from new development in response to school utilization concerns. The adjusted APFO standards postpone new development in a particular school region if the local elementary schools surpass 105% utilization, **the elementary regions surpass 105% utilization**, the middle schools surpass 110% utilization, or the high schools surpass 115% utilization. New residential development is generally "on hold" in many areas of the County due to the APFO schools test, a point discussed further in the Managing Growth chapter. Development projects are retested each year after the County Council adopts a new school capacity chart, as provided by the BOE, and may be "on hold" or delayed for a maximum of four years. **This delay provides HCPSS time to plan for and increase capacity through new additions, new schools facilities, and/or redistricting.**

School Capacity Utilization

HCPSS measures school capacity utilization by weighing student populations against a specific school's available space. The goal is to maintain a utilization rate between 90% and 100%. As per BOE policy, redistricting is considered if capacity utilizations are less than 90% or more than 110%. Capacity determinations for each school are revised periodically to reflect the realities of HCPSS' changing use of buildings, priorities, and educational norms. The annual APFO school capacity chart adopted by the County Council is based on the capacity utilization calculations.

In 2019, the BOE took proactive steps to address HCPSS' capacity issues by initiating a systemwide school boundary review, which revised the County's school attendance areas. The goals of the attendance area revisions were to balance school capacity utilization, provide relief to schools most impacted by overcrowding, and address inequities in the distribution of students participating in the Free and Reduced Meal Program. More recently, in November 2022 the BOE adopted new school boundaries to accommodate the County's newly built Guilford Park High School. As a result of the added capacity of the new high school and the recent boundary line adjustments, all high schools are projected to be under 110% capacity through 2030, with most of the 13 high schools projected to be around or below 100% capacity for the next 10 years.

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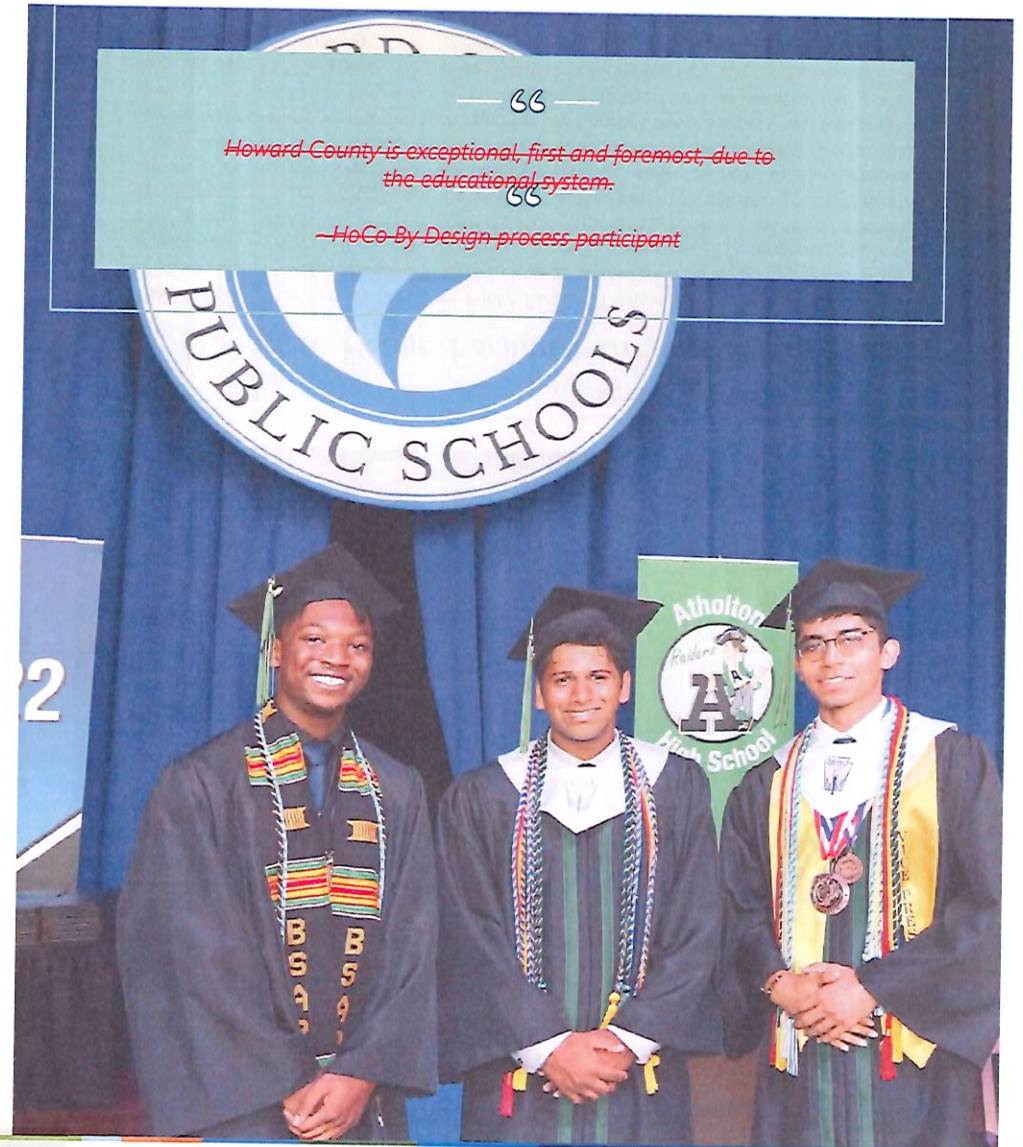
Eastern areas. Middle schools were utilized at 98% and high school capacity utilization rates were over 105% countywide. This rate will be reduced with the opening of Guilford Park High School in 2023. The highest utilization for both middle and

high school levels were in the Eastern and Northern schools. Table 8-1 shows these capacity utilization rates at each grade level. The capacities are from the June 2022 Feasibility Study. As discussed on page 17 of the Feasibility Study, the target capacity utilization range for schools is between 90 and 110%. Rates for each school are included in the study. A number of projects have been approved for funding or are planned in the BOE's latest proposed FY24 capital budget that will add seats to increase capacity in the areas of high-capacity utilization. When it opens in the fall of 2023, Guilford Park High School will add 1,658 high school seats in an area of the County with three high schools utilized at over 110%. The Oakland Mills Middle and Dunloggin Middle School renovation and addition projects will add 428 middle school seats. A renovation and addition is planned for Oakland Mills High School to add 400 seats, with an expected completion date of 2029. Further, a 289-seat addition at Hammond High School will be opening in the fall of 2023. Additional renovation and addition projects are planned with 2030 through 2032 completion dates. All of these projects will help to alleviate school crowding in certain areas of the County, based on projected enrollment growth.

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Source: Howard County Public School System, Office of School Planning



Enrollment Trends

Sources of Student Growth

To project future enrollment, the HCPSS Office of School Planning estimates enrollment growth based on the following factors: 1) the prior year official enrollment; 2) pre-K move ins; 3) the number of births in Howard County; 4) the five-year history of cohort survival (the ratio of students moving from one grade to the next in the same school); 5) first-time sales of newly-constructed homes; 6) resales of existing homes; 7) apartment turnover; and 8) out-of-district enrollment at regional programs. Each data point is analyzed for each school attendance area based on specific methodologies for each factor.

DPZ provides new housing unit projections to the Office of School Planning each December for use in their enrollment projections and Feasibility Study. The housing unit projections are one of the eight components outlined above used by the Office of School Planning for their student enrollment projection estimates. The housing unit projections include all recently approved plans not yet constructed, plans currently under review, and future development potential based on zoning capacity for each parcel. The housing unit projections provide a detailed account of when and how much housing may be built in a particular school district up to 20 years in advance. The immediate year projections, based on subdivision and site plans, are more precise indicators of near-term housing unit growth, whereas the out years provide an indication of new unit potential based on zoning capacity. The targeted activity center locations in HoCo By Design will strengthen the outer year projections by providing HCPSS a clear indication of where to expect future growth once zoning consistent with HoCo By Design is in place. Continued coordination between the County and HCPSS is essential to ensure that school capacity projects are planned in activity center areas identified for transformation on the Future Land Use Map (FLUM).

It is important to note that while new development may impact a crowded school, a significant impact to enrollment each year also comes from turnover of existing housing. This is housing that adds new students to the system upon resale of owner-occupied homes or apartment turnover. For example, an older home occupied by “empty nesters” may not have had school children living there for many years. Upon resale, however, a younger family with school children may move in.



Additionally, as mentioned above, the County provides HCPSS data on new development in the pipeline annually. On average, it takes three years for a project to reach occupancy stage and generate students. Therefore, HCPSS knows the impacts on a particular school or region at least three years in advance or more, if the schools are closed and the project is postponed due to APFO. Although HCPSS may be able to project the future demand for school capacity, only the County and State have the authority to raise revenues for future school construction. While APFO can manage enrollment growth from new development by delaying the construction of new units, it does not control student generation from housing turnover that occurs naturally over time.

Tables 8-2 and 8-3 show projected enrollment growth due to new construction, apartment turnover, and resales by school level for the last two years. When comparing these three factors, new construction was projected to account for 17.0% of new student growth in 2021 and 17.5% in 2022. There is also turnover in apartment units, often with younger families moving into larger townhomes or single-family homes as the children age. New students from resales and apartment turnover were projected to account for 83.0% and 82.5% of student growth in 2021 and 2022, respectively, when compared against growth from new home construction. Historical student yield rates from these three housing factors are used to project the future enrollment impact of these factors for each school.

Other factors that impact changes in enrollments include birth rates, cohort survival, and enrollment at regional programs. The HCPSS enrollment projection model includes these additional factors when determining future enrollment estimates.

Table 8-2: HCPSS Student Growth: New Construction vs. Resales of Existing Units & Apartment Turnover (2021)

Level	Apartment Turnover	Resales	New Construction	Total
Elementary	617	689	188	1,853
Middle	(30)	175	81	
High	(10)	97	46	
Total	577	961	315	
Percent	31.1%	51.9%	17.0%	

Source: Howard County Public School System, Office of School Planning

Table 8-3: HCPSS Student Growth: New Construction vs. Resales of Existing Units & Apartment Turnover (2022)

Level	Apartment Turnover	Resales	New Construction	Total
Elementary	587	759	212	2,004
Middle	(70)	193	83	
High	40	144	56	
Total	557	1,096	351	
Percent	27.8%	54.7%	17.5%	

Source: Howard County Public School System, Office of School Planning

Implementation of the Blueprint for Maryland's Future

Another future trend to consider is the implementation of the statewide Blueprint for Maryland's Future (Blueprint)—a set of policies and dedicated funding that is intended to transform Maryland's early childhood, elementary, and secondary school system to the level of high-performing school systems around the world. Blueprint is based on the recommendations of the Commission on Innovation and Excellence in Education. The Commission made policy recommendations to the Maryland General Assembly (MGA) and thereafter the MGA passed legislation annually from 2018 through 2021.

The General Assembly established priorities and funding provisions, including dedicated funding to support the Blueprint's implementation. Overall, the State of Maryland will invest an additional \$3.9 billion (45% increase) in Maryland's public schools by FY 2034 to assist local governments with implementing Blueprint. Additionally, local governments will also need to increase their investments to meet Blueprint goals. However, investment levels will vary by jurisdiction depending on historical spending levels.

Blueprint policies are grouped in five pillars: 1) Early Childhood Education; 2) High-Quality and Diverse Teachers and Leaders; 3) College and Career Readiness; 4) More Resources for Students to be Successful; and 5) Governance and Accountability. Policies advancing each pillar are phased in over time, with the goal of strengthening the entire educational system through improved student performance. Additional resources will be directed to students who need them the most to close achievement gaps and expand student opportunities.

Implementation of the Blueprint will occur over 10 years and will have both operating and capital budget impacts. Operationally, it is not intended to create an unfunded state mandate but rather to help local school systems refocus and reprioritize programs. Future cost estimates indicate that funding for Blueprint implementation will not exceed net local costs or typical annual growth rates. According to the State Department of Legislative Services, Howard County is one of nine counties that has consistently funded local schools above the required annual Maintenance of Effort (MOE) levels and is not expected to incur any additional local costs beyond historical trends to meet Blueprint mandates since "projected appropriations under current practices exceed the amount required under the Blueprint legislation."



The State's legislative analysis also indicates that Blueprint implementation, when coupled with the significant increases of nearly \$4 billion in state aid to school systems over the next 10 years, is intended to help local school systems enhance and reprioritize programs to enrich student experiences and accelerate improved student outcomes.

Given the County's historic high levels of spending, which are significantly above the MOE, and given additional state funding available, local fiscal impacts are not expected to exceed annual budgetary growth rates. The FY 24 Spending Affordability Advisory Committee reviewed these assumptions as part of their thorough review of the HoCo By Design fiscal analysis and found that "the final fiscal impact analysis is sound in methodology and presents reasonable conclusions."

Implementation of the prekindergarten requirement under Pillar 1 (Early Childhood Education) will require additional capacity beyond what can be accommodated in existing school buildings. However, the Blueprint allows for private academic institutions that meet prescribed quality standards to receive state funding for prekindergarten programs. This will help defray capital and programming costs and reduce the public share of capacity needed to provide voluntary full-day prekindergarten services. HCPSS is in early planning stages and has been exploring a variety of strategies, including converting half-day classrooms to full-day, construction of regional early childhood centers, additions to existing elementary schools, and/or leasing commercial space. Guidance regarding implementation is still evolving, and further study and planning will be necessary. Alternative strategies could include additions to elementary schools, renting or leasing commercial space, or other space solutions.

The Schools SAG discussions emphasized the need for school facilities, particularly to support regional early childhood programs required by the Blueprint. They acknowledged that the availability of large parcels suitable to school site requirements is extremely limited and recommended a more proactive approach to property identification, evaluation, and acquisition of sites for public use. Strategies they discussed included, a right of first refusal to purchase properties in certain geographies and partnering with the private sector to acquire and amass small parcels into sites large enough for school use.

PS-1 Policy Statement

The County, Howard County Public School System (HCPSS), and private sector should work collaboratively to identify school sites that meet the needs of the student population and anticipate future growth patterns.

Implementing Actions

1. ~~Examine alternatives to the Adequate Public Facilities Ordinance waiting periods whereby a development proposal offsets the potential impact to zoned schools through an additional voluntary mitigation payment.~~
2. 1. Ensure coordination of HoCo By Design and the HCPSS capital planning so that school capacity projects are planned in activity center areas identified for transformation on the Future Land Use Map.

Regulatory Process

The County's Subdivision and Land Development Regulations allow for land in a subdivision or building development to be reserved for public facilities, such as schools, if it is not being used as open space. The SAG explored this process as a tool to increasing the Land Bank. The SAG's discussions revealed that the regulations are not aligned well to current development patterns, HCPSS facilities and budget planning timelines, and the County's development review process. The SAG concluded that the reservation process should be evaluated, and regulation changes recommended to increase use of this tool. Further, these regulations were recently expanded to allow for reservation of buildings. If properly timed, such building reservations could allow HCPSS to purchase available properties in the near term with leaseback options to tenants to hold land or buildings for future school needs. Activity center redevelopment and Route 1 redevelopment provide excellent opportunities to exercise building reservations, especially in areas where existing commercial is struggling.

Finally, HCPSS staff have reported challenges with regulations, such as setback, height limits, and other bulk regulations, that limit the developable footprint for buildings, athletic fields, and other site amenities. The Zoning Regulations should be updated to allow for administrative approval of variances to bulk regulations as they relate to school facility development.

Co-locating Facilities

In the face of dwindling land supply, opportunities to co-locate school facilities with other public amenities, like libraries, park and recreational facilities, community centers, affordable housing, police or fire stations, and athletic fields, allow for optimal use of limited greenfield space and leverage additional funding opportunities. As Blueprint implementation is evaluated, government and commercial centers should be considered to house mandatory prekindergarten programs that are conveniently located, accessible, and/or create opportunities to provide wrap-around services to families and students. These options should be considered during the capital planning process and coordinated with HCPSS to ensure educational programming standards are maintained.

Finally, educational facilities ~~can~~ may be integrated into mixed-use activity centers and can serve nearby residences through safe convenient pedestrian connections. ~~Specifically, redevelopment of Gateway into a Regional Activity Center must thoroughly evaluate impacts to school capacity and ensure that the requisite number of schools are integrated and appropriately phased into the redevelopment program. Future redevelopment of Gateway into a Regional Activity Center must include a thorough evaluation of school capacity, and any deficiencies created through its redevelopment must be mitigated by providing requisite school facilities.~~ A public-private partnership model may be considered as part of an innovation district design.



PS-3 Policy Statement

The County and Howard County Public School System (HCPSS) should collaborate on future school siting and develop tools that provide the flexibility needed to allow for alternative school designs, flexible site requirements, and adaptive reuse of underutilized properties.

Implementing Actions

1. Consider adaptive reuse of commercial real estate for ~~school buildings~~ of HCPSS office space.
2. Consider leasing space for early childhood or other HCPSS programming.
3. Evaluate integrating public prekindergarten into government and commercial centers that encourage convenience for working parents, increase access to communities, and/or create opportunities to provide wrap-around services to families and students.
4. Evaluate the efficacy of using smaller existing HCPSS-owned properties for regional programs and/or shared athletic facilities.
5. Examine alternative school design models that establish a variety of forms to maximize available land resources. This may include higher capacity buildings, smaller footprints, shared site amenities, modular design, and/or vertical construction.
6. Explore opportunities for co-location of school facilities with other public amenities, like libraries, parks, affordable housing, and athletic fields, to make use of limited greenfield space and leverage additional funding opportunities.
7. Ensure future redevelopment of Gateway into a Regional Activity Center includes a thorough evaluation of school capacity and that any deficiencies created through its redevelopment are mitigated by providing requisite school facilities.
8. Ensure development of activity centers includes a review of school capacity needs and opportunities to address those needs within the activity center.

PS-4 Policy Statement

Revisions to the County's Zoning Regulations and Subdivision and Land Development Regulations should provide more flexibility for school site development and remove barriers to efficient use of school site property.

Implementing Actions

1. The Zoning Regulations update should allow administrative approval of zoning variances as they relate to school facility development.
2. Evaluate the applicability of the Subdivision and Land Development Regulations governing reservations of land for public facilities to determine appropriate changes that would increase utilization.

Accommodating Future School Needs

To effectively accommodate future school needs, three important “legs of the stool” must all work together: 1) effective land use planning and growth management; 2) adequate school funding and strategic acquisition and construction methods; and 3) attendance area redistricting to efficiently use systemwide capacity.

The General Plan and APFO establish the land use plan, policies, and growth management tools for the first component. HoCo By Design proposes updated policies to better integrate school planning needs, particularly given the limited land available for new schools. As required in the current APFO, a review committee is to be convened within one year of the enactment of HoCo By Design to recommend changes. Continuous review and updates to policies and regulatory tools should occur to adapt to changing demographics, market conditions, and land use patterns. Guidance for the APFO committee is described in the Managing Growth chapter.



Fulfilling the second component is a continuous challenge, particularly in light of increasing levels of service delivery. The issue is compounded by the growing capital needs to replace or renovate older schools that are near the end of their useful lives and that had been designed based on decades-old service level expectations. Furthermore, in recent years school construction costs have increased faster than the general rate of inflation. These challenges call for new and proactive approaches to property identification, evaluation, and acquisition for public school use. In response to these challenges, the SAG discussed various market based approaches that foster public-private partnerships including; establishing a right of first refusal to purchase properties in certain priority geographies for school sites, researching models for government and/or private sector partners to acquire and assemble small parcels to achieve desirable acreages for school sites, using real estate data to monitor leasing and sale opportunities for site or building acquisition, and considering leaseback options as a mechanism to hold land for future school needs.

Fulfilling the third leg is complex and challenging. HCPSS 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. With limited funding and land availability for new schools, redistricting is a necessary tool to use available systemwide capacity.

Over the last several years, actions have been taken to address each of these three items. APFO has been amended to reduce the amount of development allowed to proceed in a given year, and HoCo By Design recommends further changes to adapt to anticipated growth patterns. To address funding, recent increases in the Transfer Tax and the Public Schools Facility Surcharge will help to pay for school capital needs. However, further funding solutions will be necessary in the years ahead, including working with our state and federal partners.

Finally, the Howard County Board of Education completed a comprehensive redistricting for the 2020/21 school year and high school redistricting in November 2022 in anticipation of the opening of the new Guilford Park High School in the fall of 2023.

~~Recent amendments to APFO resulting in a stricter School Capacity Test have placed more new residential subdivisions and infill projects in a holding pattern. This may serve as an impediment to housing affordability and lead to reduced capital revenues for schools. Without increased funding from new development, new school construction will be limited. The challenge is to find a balance that works, where growth can generate revenue for the County, while occurring in a predictable and gradual manner. Cutting off one leg of the stool will not solve the problem and could lead to further imbalance. All three legs need to work together to ensure Howard County maintains the superior quality of public education for which it is known.~~

PS-5 Policy Statement

The need for school facilities—particularly to support regional early childhood programs in the near term—warrants a more proactive approach to property identification, evaluation, and acquisition for public use.

Implementing Actions

1. Continue to review and update policies and regulatory tools to better align school planning needs to changing demographics, market conditions, and land use patterns.
2. Consider a right of first refusal strategy to purchase properties proposed for sale in certain priority geographies.
3. Research models for government and private sector partners to acquire and amass small parcels into sites large enough for school use.
4. Use data/intelligence from the real estate industry to monitor leasing and sale opportunities for site acquisition.
5. Consider purchasing available properties in the near term with leaseback options to tenants as a means to hold land for future school needs.

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year,
QBD-8 - Expand documentation, protection, and education regarding the County's diverse historic resources.		
1. Research and create a mechanism similar to a historic landmarks program that can be used as a tool for identifying valuable historic resources and efforts to protect them.	DPZ	Long-term
2. Expand documentation efforts to include "recent past" buildings, such as those of significance in Columbia and other maturing areas.	DPZ	Long-term
3. Continue to update the Historic Sites Inventory through updated inventory forms for properties added in the 1970s-1990s and for new sites.	DPZ	Ongoing
4. Create more thorough inventories of the County's historic resources and expand documentation of ethnicity, cultural context, and historic relevance to the County's history.	DPZ Non-profit Partners	Long-term
5. Work with nonprofit organizations to create opportunities for the Howard County community to learn about its historic sites, including telling all stories in the County.	DPZ DRP	Long-term
6. Explore grants for documentation of archeological resources, museum collections, and oral histories, and partner on this initiative with local preservation nonprofit organizations.	DPZ	Ongoing
7. Participate in a statewide effort to create one master state map of all known cemeteries.	DPZ	Long-term
PS-1 - The County, Howard County Public School System (HCPSS), and private sector should work collaboratively to identify school sites that meet the needs of the student population and anticipate future growth patterns.		
1. Examine alternatives to the Adequate Public Facilities Ordinance waiting periods whereby a development proposal offsets the potential impact to zoned schools through an additional voluntary mitigation payment.	DPZ	Mid-Term
2. <u>1.</u> Ensure coordination of HoCo By Design and the HCPSS capital planning so that school capacity projects are planned in activity center areas identified for transformation on the Future Land Use Map.	DPZ HCPSS	Ongoing

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe Mid-Term five-year, Long-Term six+ years, Ongoing)
PS-2 - The County and Howard County Public School System should partner to leverage additional public and private resources to meet school facility needs and timing.		
1. Examine the costs and benefits of public-private partnership models to address near-term school facility acquisition, construction, and renovation needs, including long-term financial commitments and considerations.	HCPSS Private Partners	Mid-Term
2. Evaluate a trust fund for school site acquisition or partnerships with philanthropic organizations to purchase property and hold it for a short term until school facilities can be built.	HCPSS Private Property Owners	Mid-Term
PS-3 - The County and Howard County Public School System (HCPSS) should collaborate on future school siting and develop tools that provide the flexibility needed to allow for alternative school designs, flexible site requirements, and adaptive reuse of underutilized properties.		
1. Consider adaptive reuse of commercial real estate for school buildings or HCPSS office space.	HCPSS	Mid-Term
2. Consider leasing space for early childhood or other HCPSS programming.	HCPSS	Mid-Term
3. Evaluate integrating public prekindergarten into government and commercial centers that encourage convenience for working parents, increase access to communities, and/or create opportunities to provide wrap-around services to families and students.	HCPSS	Mid-Term
4. Evaluate the efficacy of using smaller existing HCPSS-owned properties for regional programs and/or shared athletic facilities.	HCPSS	Mid-Term
5. Examine alternative school design models that establish a variety of forms to maximize available land resources. This may include higher capacity buildings, smaller footprints, shared site amenities, modular design, and/or vertical construction.	HCPSS	Long-term
6. Explore opportunities for co-location of school facilities with other public amenities, like libraries, parks, affordable housing, and athletic fields, to make use of limited greenfield space and leverage additional funding opportunities.	HCPSS All Agencies	Ongoing
7. Ensure future redevelopment of Gateway into a Regional Activity Center includes a thorough evaluation of school capacity and that any deficiencies created through its redevelopment are mitigated by providing requisite school facilities.	DPZ HCPSS Private Partners	Mid-Term
8. Ensure development of activity centers includes a review of school capacity needs and opportunities to address those needs within the activity center.	DPZ HCPSS Private Partners	Mid-Term

Amendment 73 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 11

Date: 10/02/2023

Amendment No. 73

(This Amendment makes the following changes to HoCo by Design Chapters 6 and 11:

Chapter 6: Dynamic Neighborhoods - Deletes Implementing Action 4 in the DN-2 Policy Statement.

Chapter 11: Implementation - Deletes Policy and Implementing Action 4 in the DN-2 Policy and Implementing Action in Table 10-1: Implementation Matrix.)

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 6: Dynamic Neighborhoods, page 40; and
4 • Chapter 11: Implementation, page 37.

5
6 Correct all page numbers, numbering, and formatting within this Act to accommodate this
7 amendment.

8

I certify this is a true copy of

Am 73 CB 28-2023

~~_____~~ on 10/11/2023
~~_____~~
Council Administrator

Failed

DN-1 Policy Statement



Increase opportunities for missing middle housing through the creation and use of zoning tools and incentives.

Implementing Actions

1. Evaluate conditions where duplex and multiplex homes can be compatible with existing neighborhoods and permitted by-right in a greater number of residential and mixed-use zoning districts.
2. Identify and eliminate barriers in the Zoning Regulations and Subdivision and Land Development Regulations to housing stock diversification. Ensure that bulk regulations are realistic for these housing types and do not preclude their potential on existing lots.
3. Expand the types of housing allowed in the Zoning Regulations and Subdivision and Land Development Regulations to include missing middle housing types, such as stacked townhomes, cottage clusters, and multiplexes, and consider appropriate parking requirements for these housing types.
4. Evaluate and establish one or more of the following zoning tools and incentives as potential opportunities to create missing middle housing:
 - a. Zoning overlays or floating zones that could be applied to activity centers, transportation corridors, or other areas that are appropriate for this housing type.
 - b. Smaller lot sizes (lot width and lot area).
 - c. Density-based tools such as transfer of development rights or density bonuses.
 - d. Tax incentives for developers and/or land owners.
 - e. Flexible development standards such as maximum building size or lot coverage.
5. Establish regulations that disperse missing middle homes throughout the County so that neighborhoods contain a proportionate mix of different housing types and can balance other infrastructure needs.
6. Explore opportunities to work with public and private partners to build missing middle housing demonstration projects or provide models and designs for these housing types.

DN-2 Policy Statement



Allow attached and detached accessory dwelling units (ADUs) on a variety of single-family attached and single-family detached lots that meet specific site development criteria in residential zoning districts.

Implementing Actions

1. Establish a clear, predictable process and location-specific criteria for ADUs.
2. Revise the Zoning Regulations and Subdivision and Land Development Regulations to allow attached and detached ADUs that meet pre-determined location and site criteria. Provide parking requirements as needed.
3. Establish a clear definition of ADUs in the updated Zoning Regulations.
4. ~~Direct the Adequate Public Facilities Ordinance (APFO) task force to develop recommendations as to the applicability of APFO to accessory dwelling unit creation or construction.~~

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
DN-2 - Allow attached accessory dwelling units (ADUs) on a variety of single-family attached and single-family detached lots that meet specific site development criteria in residential zoning districts.		
1. Establish a clear, predictable process and location-specific criteria for ADUs.	DPZ	Mid-Term
2. Revise the Zoning Regulations and Subdivision and Land Development Regulations to allow attached and detached ADUs that meet pre-determined location and site criteria. Provide parking requirements as needed.	DPZ DHCD	Mid-Term
3. Establish a clear definition of ADUs in the updated Zoning Regulations.	DPZ	Mid-Term
4. Direct the Adequate Public Facilities Ordinance (APFO) task force to develop recommendations as to the applicability of APFO to accessory dwelling unit creation or construction.	DPZ DHCD	Mid-Term
DN-3 - Future activity centers—as identified on the Future Land Use Map (FLUM)—should include a unique mix of densities, uses, and building forms that provide diverse, accessible, and affordable housing options.		
1. Establish a new mixed-density and mixed-use zoning district that encourages diverse housing types and creates opportunities for mixed-income neighborhoods.	DPZ	Mid-Term
2. Allow a vertical (a range of uses within one building) and horizontal (a range of uses within one complex or development site) mix of uses, including housing, employment, and open space, that encourage walkability and transit connections.	DPZ OOT	Mid-Term
3. Incentivize the production of housing units affordable to low- and moderate-income households, beyond what is currently required by the Moderate Income Housing Unit (MIHU) program.	DHCD DPZ Non-profit Partners	Ongoing
4. Incentivize the production of housing units that meet the needs of different levels of ability (like persons with disabilities) and other special needs households. Ensure that these units are both accessible and affordable.	DPZ DHCD Non-profit Partners	Ongoing

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
DN-4 - Allow the development of small-scale missing middle housing and accessory dwelling units (ADUs) that respect the character and integrity of their surroundings and meet specific site conditions in single-family neighborhoods.		
1. Establish design requirements, pattern book or character-based regulations for missing middle housing types and detached accessory dwelling units to ensure that new construction is consistent with the character of the surrounding existing housing.	DPZ	Long-term
2. Establish provisions in the regulations that include dimensional and design standards to ensure neighborhood compatibility, off-street parking requirements, minimum lot sizes, and other standards.	DPZ	Mid-Term
3. Explore zoning and other incentives for minor subdivisions that consist of missing middle housing types and explore form-based or character-based zoning for these types of residential infill developments.	DPZ	Mid-Term
4. Evaluate how accessory dwelling units and other types of new development could enhance or impact stormwater management practices.	DPZ DPW	Mid-Term

Amendment 74 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 11

Date: 10/02/2023

Amendment No. 74

(This Amendment makes the following changes to HoCo by Design Chapter 5 and Chapter 11:

Chapter 5: Economic Prosperity

I certify this is a true copy of
Am 74 CB28-2023
passed on 10/11/2023
Muehler
Council Administrator

- Removes all quotes;
- Amends the projected housing from 30,000 to 31,000 and enumerates the projection based on housing type;
- Renames the "Promoting a Healthy Jobs/Housing Balance" Section to "Promoting Healthy Jobs" and removes all but the first two paragraphs;
- Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, allow redevelopment in Activity Centers that provides convenient retail and services, and removes the creation of housing for County essential workers;
- Removes a reference to New Cultural Center;
- Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City ~~and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;~~
- Removes the entire section titled "Autonomous Vehicles";
- Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;
- Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers ~~and substitute activity centers;~~
- Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens;
- Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, allow redevelopment in Activity Centers that provides convenient retail and services, and removes the creation of housing for County essential workers;
- Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City ~~and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;~~

Chapter 11: Implementation

- Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;
- Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers and substitute activity centers ; and
- Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens.)

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 5, Economic Prosperity: 10, 11, 14, 30, 33, 35, 36, 37, 42, 43, 44, 46, 48, 49, 50,
4 52, and 60;
- 5 • Chapter 11: Implementation: 30, 31, 32, and 34.

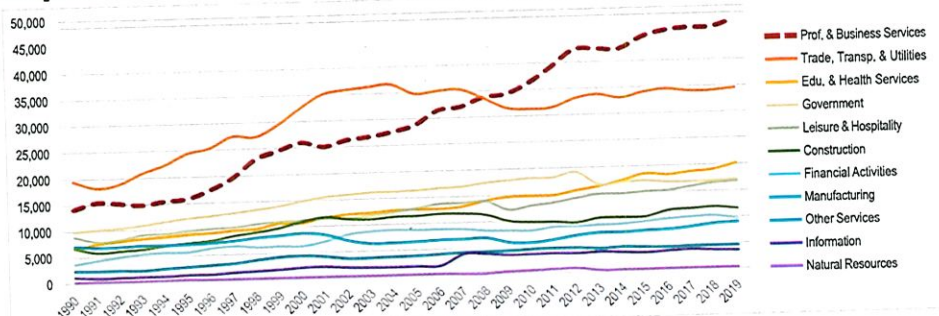
6 Correct all page numbers, numbering, and formatting within this Act to accommodate this
7 amendment.

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Existing Market and Land Use Conditions

Howard County is located in the center of the nation's fourth largest metropolitan area. This has positioned the County as a regional employment center, attracting both business and job-seekers from across central Maryland and the nation as a whole. Over the last ten years, an average of more than 3,000 new jobs per year have been added to the County's employment base. Key employment sectors in the County include professional and business services; trade, transportation, and utilities; and education and health services. Growth in these sectors—particularly the professional and business services sector—is partly attributed to the County's favorable location in the broader Baltimore-Washington region, as well as Howard County's reputation as an attractive place to live and do business.

Graph 5-1: Historical Employment by Sector, 1990-2019, Howard County, MD

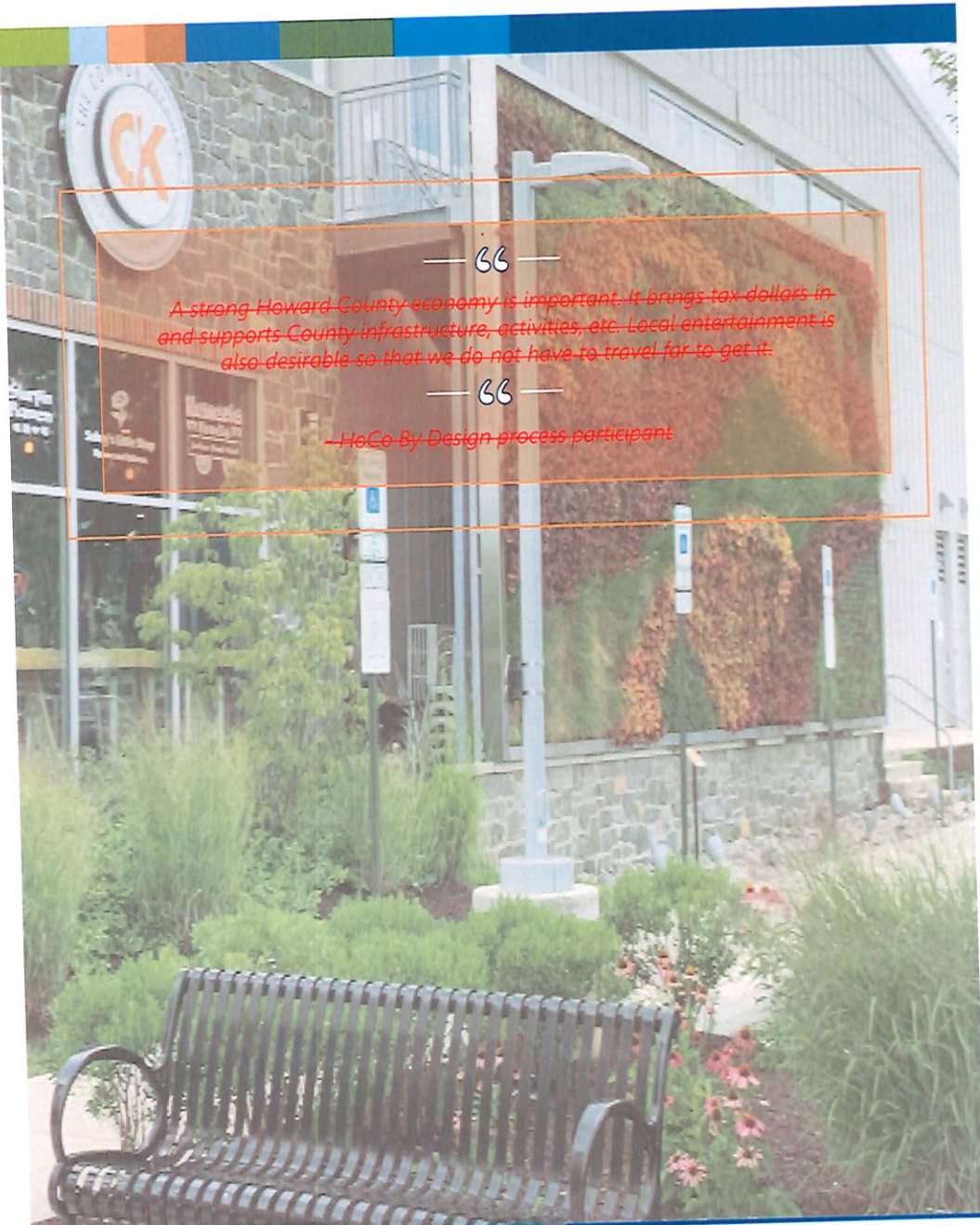


Source: Bureau of Labor Statistics, RCLCO

This trend in job growth is expected to continue over the next 20 years, as the regional job market continues to grow. The HoCo By Design team evaluated baseline conditions and emerging trends in a series of assessments completed in late 2020. The Market Research and Demand Forecast completed at that time projects Howard County could be home to up to 282,000 jobs by 2040, an increase of 59,000 jobs from estimated totals in 2019. By continuing to attract a diverse and highly-talented pool of workers, Howard County will earn its share of regional jobs. But capturing this share requires accessibility to workforce housing, transit, and other lifestyle amenities.

Growing local jobs will also help expand the County's commercial tax base, which was a key recommendation in the FY22 Spending Affordability Advisory Committee (SAAC) Report. The SAAC is tasked with annually reviewing County revenues and expenditures, and making recommendations on revenue projections, bond authorizations, long-term fiscal outlook, and other findings or recommendations that the committee deems appropriate.

According to the SAAC FY22 report, "[b]oosting commercial-base development is one of the most promising strategies to help rebalance the expenditure needs and fiscal resources. The County should continue to build on its current strengths in developing and implementing comprehensive strategies to promote, retain, and expand its commercial base." The report further detailed the importance of the General Plan in guiding development decisions that consider fiscal impacts on the County's budget and maintaining existing commercially zoned land to allow for additional commercial development. This conclusion was reiterated in the FY23 SAAC report, which called for the General Plan to encourage redevelopment and commercial growth in defined employment centers.



Current Jobs and Unemployment

According to the Maryland Department of Labor, there were over 174,000 jobs in Howard County in 2020. As indicated in Table 5-1, Howard County had the 6th greatest number of jobs in Central Maryland and the 2nd greatest 10-year job growth rate at 23.5%, just behind the 24.5% growth rate experienced in Anne Arundel County. Montgomery County had the greatest number of jobs in Central Maryland, followed by Baltimore City and the other large counties surrounding Howard County.

Table 5-1: Jobs in Central Maryland

	2010		2020		2010 to 2020	
	Jobs	Percent	Jobs	Percent	Jobs	% Increase
Montgomery County	433,226	22%	469,462	21%	36,236	8.4%
Baltimore City	320,403	16%	389,738	17%	69,335	21.6%
Baltimore County	355,189	18%	374,165	17%	18,976	5.3%
Prince George's County	292,271	15%	318,755	14%	26,484	9.1%
Anne Arundel County	220,228	11%	274,102	12%	53,874	24.5%
Howard County¹	141,169	7%	174,390	8%	33,221	23.5%
Frederick County	89,106	4%	104,013	5%	14,907	16.7%
Harford County	78,828	4%	93,784	4%	14,956	19.0%
Carroll County	52,772	3%	57,571	3%	4,799	9.1%
TOTAL	1,983,192	100%	2,255,980	100%	272,788	13.8%

Source: Maryland Department of Labor (1st quarter)

Table 5-2 shows the major employers in Howard County, based on information provided by the Howard County Economic Development Authority (HCEDA). Howard County continues to be an attractive place for large businesses. However, as important as large companies may be, HCEDA's Strategic Plan suggests that fostering small to mid-size companies should be prioritized to achieve maximum future job growth. As new businesses expand, new job opportunities will arise, particularly in the professional and business services and technology sectors.

Given the highly-educated workforce in Howard County, the unemployment rate is typically among the lowest in Maryland. As of August 2021, the unemployment rate in Howard County was 4.3%, compared to 5.8% in Maryland and 5.2% in the US. It is anticipated that the unemployment rate will remain low in Howard County over the next 20 years as the County's job base and population continue to grow. Howard County's location in the middle of the Baltimore and Washington regions will continue to be an asset, attracting new businesses and offering opportunities for residents to find work that matches their education and skills.

Market Demand Conditions

In addition to projecting the need for ~~30,000~~ **31,000** new housing units, the Market Research and Demand Forecast projected the need for 16.5 million square feet of commercial space and 1,000 hotel rooms. The commercial space needs are broken down by industry in Table 5-3 and housing units are broken down by type.¹ **The housing unit projection includes demand for 20,000 homeownership opportunities (single family attached, detached, and condos) and 11,000 apartment units.**

Table 5-2: Howard County's Largest Private Employers (2022)

Employer	Estimated Employees	Product/Service
Johns Hopkins Applied Physics Laboratory	7,200	R&D systems engineering
Howard County General Hospital	1,800	Medical services
Verizon	1,700	Telecommunications
Howard Community College	1,400	Higher education
The Columbia Association	1,200	Nonprofit civic organization
Lorien Health Systems	1,190	Nursing care
Coastal Sunbelt Produce	1,050	Food products distribution
Nestle Dreyer's Ice Cream	835	Frozen desserts
Freshly	820	Prepared meals manufacturing
Wells Fargo	810	Financial services
Maxim Healthcare Services	675	HQ/Medical staffing, wellness
Oracle	650	Software development
W.R. Grace & Co.	600	HQ/Chemical R&D
Sysco Food Services	515	Food products distribution
Enterprise Community Partners	505	HQ/Community development

Note: Excludes post offices and state and local governments

Source: HCEDA Research

Table 5-3: Summary of Demand 2020-2040

	Cumulative Demand By 5-Year Increment			
	2025	2030	2035	2040
Single-Family Detached (units)	3,428	5,808	7,996	9,807
Single-Family Attached (units)	2,743	4,685	6,502	8,033
Rental Apartment (units)	3,626	6,320	8,947	11,249
For-Sale Condominium (units)	437	859	1,361	1,884
Office (sf)	1,828,711	3,289,007	4,741,323	6,315,129
Flex (sf)	317,406	564,815	792,410	1,030,921
Industrial (sf)	2,358,227	4,164,086	5,570,199	7,150,158
Retail (sf)	642,400	1,125,800	1,603,300	2,037,600
Hotel (keys)	246	509	752	1,019

¹ As previously noted, RCLCO's Market Research and Demand Forecast projected a 59,000 increase in jobs by 2040. To arrive at this figure, RCLCO first examined Baltimore Metropolitan Council (BMC) projections for the region, then used Moody's Analytics projections to distribute regional growth by industry (adjusting for COVID-19 impacts), and finally determined the County's future share of regional industry growth using historical trends. RCLCO then projected household growth based on this projected employment growth, arriving at a projected need for 31,000 new housing units in the County. In addition to projecting the need for 31,000 new housing units, the Market Research and Demand Forecast projected the need for 16.5 million square feet of commercial space and 1,000 hotel rooms. RCLCO projected demand for office, flex, and industrial space by estimating the type of space and square footage needed to accommodate each new employee by industry; projections for hotel rooms were based on the current ratio between jobs in the County and hotel rooms. RCLCO projected demand for retail space based on estimated spending from new households and employees (adjusting for online spending).

Commercial

Commercial land uses comprise 3%, or approximately 6.9 square miles, of land in the County. Included in this category are retail, office, hotel, and service-oriented business uses. As shown in Map 5-1, these uses are primarily concentrated along major roads—Route 29, Route 1, and Route 40—or in suburban activity centers such as Downtown Columbia, Maple Lawn (including the neighboring Johns Hopkins Applied Physics Laboratory), and the Columbia Gateway area. Other locations are scattered throughout the County.

Most residents and employees will shop in-person near their home or place of work, while certain destinations are likely to draw users from across Howard County for specific shopping needs. Commercial uses are expected to be heavily concentrated in denser and/or more accessible parts of the County, such as Columbia, where office and retail demand is likely to be strongest. However, declining demand for “brick and mortar” retail and the changing needs of office users may lead to workplace transformations.

Based on the Department of Planning and Zoning (DPZ) land use database and CommunityViz modeling, it is estimated that there is potential to build about 10.1 million square feet of new non-residential building space in Howard County under current zoning, as shown in Table 5-4. This figure includes an additional 4.7 million square feet planned for Downtown Columbia. The Market Research and Demand Forecast indicated that there is a potential market demand in Howard County for 16.5 million square feet of new non-residential building space through the year 2040. As such, a shortfall of about 6.4 million square feet, or 38%, exists.

Table 5-4: Non-residential Jobs and Building Square Feet Potential Under Current Zoning and Undeveloped Land Capacity in Howard County

Non-Residential Building Type	Square Feet (X 1,000)	Estimated Jobs
Retail	1,700	4,100
A/B+ Office	5,200	17,300
B/C/Flex Office	800	2,600
Total	10,100	28,300

Source: DPZ Land Use Database and CommunityViz modeling

The existing capacity of 10.1 million square feet of non-residential space is estimated to accommodate 28,300 jobs, based on current jobs to building space ratios. This is less than half of the market demand of 59,000 new jobs over 20 years. This additional job demand could be accommodated through redevelopment opportunities in the activity centers and other non-residential character areas as identified on the Future Land Use Map (FLUM). These places can meet the greater market demand for non-residential space.

The greatest opportunity to accommodate the additional job demand would be the redevelopment of the large Regional Activity Center shown on the FLUM (the current Gateway office park). A master plan for Gateway could explore a variety of mixed-use development opportunities. Development in Gateway will extend beyond 2040 and could therefore accommodate additional demand after the 20-year timeframe of this Plan.



Retaining Industrial Lands

Industrial land loss is common in urban and suburban areas where higher-value commercial and residential uses compete for scarce land supply. However, industrial jobs, particularly the manufacturing, distribution, and warehousing sectors, not only supply the region with goods but also address wage inequality by providing middle-income wages in jobs that do not require an advanced education, as shown in Table 5-5. With only 3% of the land in Howard County available for industrial uses and a limited supply of large industrially zoned properties, the County must enact policies and regulations and make thoughtful planning decisions that ensure the long-term viability of the industrial economy.

Table 5-5: Howard County Annual Average Employment and Wages by Industry

CALENDAR YEAR 2020		
INDUSTRY	ANNUAL AVERAGE EMPLOYMENT	AVERAGE WEEKLY WAGE PER WORKER
GOVERNMENT SECTOR -- TOTAL	16,210	\$1,329.00
Federal Government	740	\$1,598.00
State Government	1,731	\$1,369.00
Local Government	13,740	\$1,309.00
PRIVATE SECTOR TOTAL -- ALL INDUSTRIES	145,159	\$1,553.00
GOODS-PRODUCING	19,932	\$1,553.00
Natural Resources and Mining	301	\$1,001.00
Construction	10,962	\$1,516.00
Manufacturing	8,669	\$1,620.00
SERVICE PROVIDING	125,223	\$1,552.00
Trade, Transportation, and Utilities	32,526	\$1,287.00
Information	3,588	\$3,040.00
Financial Activities	9,480	\$1,927.00
Professional and Business Services	45,528	\$2,080.00
Education and Health Services	18,278	\$1,061.00
Leisure and Hospitality	11,894	\$476.00
Other Services	3,929	\$916.00

Source: Maryland Department of Labor

— “ —
Route 1 has been industrial for decades and has the infrastructure. Industrial is important to the County tax base and needs to be encouraged.
 — “ —
—HoCo By Design process participant


HoCo By Design establishes two industrial based character areas: Industrial and Industrial Mixed-Use. The Industrial Character Area supports both larger-scale, single-user industrial, warehouse, and flex spaces and smaller, multi-tenant industrial buildings that are clustered and support one another. The Industrial Mixed-Use Character Area is designed with Route 1 activity centers in mind. This character area is applied to select nodes along the Corridor that are positioned for mixed-use development but contain existing industrial uses that may be integrated into future redevelopment, as shown in Map 5-4. This character area advances dual goals of providing redevelopment opportunities and preserving industrial uses.

As noted earlier in this chapter, while most of the County's industrial land uses are located in the Route 1 Corridor, a portion is located in eastern Columbia. While challenges like truck access exist, industrial uses should continue to be part of the area. During the Zoning Regulations update, the County should ensure that existing industrial uses are able to continue or expand operations.

Future industrial uses along the Interstate 70 corridor should be supported. However, they should be designed with sensitivity to the surrounding rural context and be able to operate on well and septic systems.



EP-1 Policy Statement

 Retain and expand the use of industrial land to support employment opportunities that pay a living wage.

Implementing Actions

1. As part of the Zoning Regulations update, consider protective measures to ensure an adequate long-term supply of industrial land, such as additional requirements or impact statements for rezoning industrial land, zoning that discourages incompatible uses in heavy industrial areas, heavy buffer requirements for non-industrial users locating near heavy industrial land, or industrial overlay zoning for prime industrial land.
2. Determine how compatible uses can co-locate in designated Industrial Mixed-Use character areas to support industrial operations and create an active sense of place.
3. Prioritize for retention industrial land that is uniquely accessible to regional highways for continued industrial use.
4. During the Zoning Regulations update or via Zoning Amendments, favorably consider context-sensitive industrial uses along the Interstate 70 corridor.

EP-2 Policy Statement

Ensure redevelopment is consistent with the character of industrial areas.

Implementing Actions

1. Update the Route 1 Design Manual to include Industrial Mixed-Use character areas and incorporate buffers between redevelopment areas and industrial areas.

— “ —
The Plan needs to anticipate a changing economy and create economic opportunities for new enterprises and a diverse economy.

— “ —
—HoCo By-Design process-participant

Growing Emerging and Significant Industries

Howard County has a strong local economy and serves as a regional employer. As shown in Table 5-2, Howard County's major employers represent a diverse set of industries. Strong and significant industries in the County include cybersecurity, information security, information technology, green technology, higher education, research and development, and finance. The nonprofit sector also plays an important role in the County; according to Maryland Nonprofits, Howard County was home to 2,094 nonprofits in 2019 (the largest of which was the Columbia Association). To maximize Howard County's economic competitiveness in the region, economic development should support emerging and significant industries to continue to diversify employment opportunities. By keeping apprised of changing economic trends, Howard County will be able to attract new and diverse industries that support expected job growth. This economic development focus should include the manufacturing, distribution, and logistics industries, which are responding to changes in consumer trends.

The green or environmental industry is another important and emerging employment sector. According to the Bureau of Labor Statistics, green jobs are “jobs in businesses that produce goods or provide services that benefit the environment or conserve natural resources” or “jobs in which workers’ duties involve making their establishment’s production processes more environmentally friendly or use fewer natural resources.” Investment in the environmental sector accomplishes multiple sustainability goals. The environmental sector tends to endure through economic downturns, bolstering a sustainable economy. This sector traverses multiple industries and creates a significant job pool accessible to a variety of skill sets. By creating opportunities for workers without a college degree, green jobs promote economic mobility and help to close the opportunity gap. Importantly, green jobs also promote environmental sustainability through more efficient energy consumption, reduced greenhouse gas emissions and waste, ecosystem protection, and climate mitigation and adaptation.

Policies and the Zoning Regulations should support these emerging and significant industries to ensure a healthy and diverse local economy. This support will ensure that the County will be able to meet the future job demand, as indicated in the market study conducted for this General Plan. Deliberate efforts and investments would demonstrate the County is committed to being competitive to attract and grow emerging industry sectors.

EP-3 Policy Statement

Support and diversify the local job market to maximize opportunities to grow regional employment.

Implementing Actions

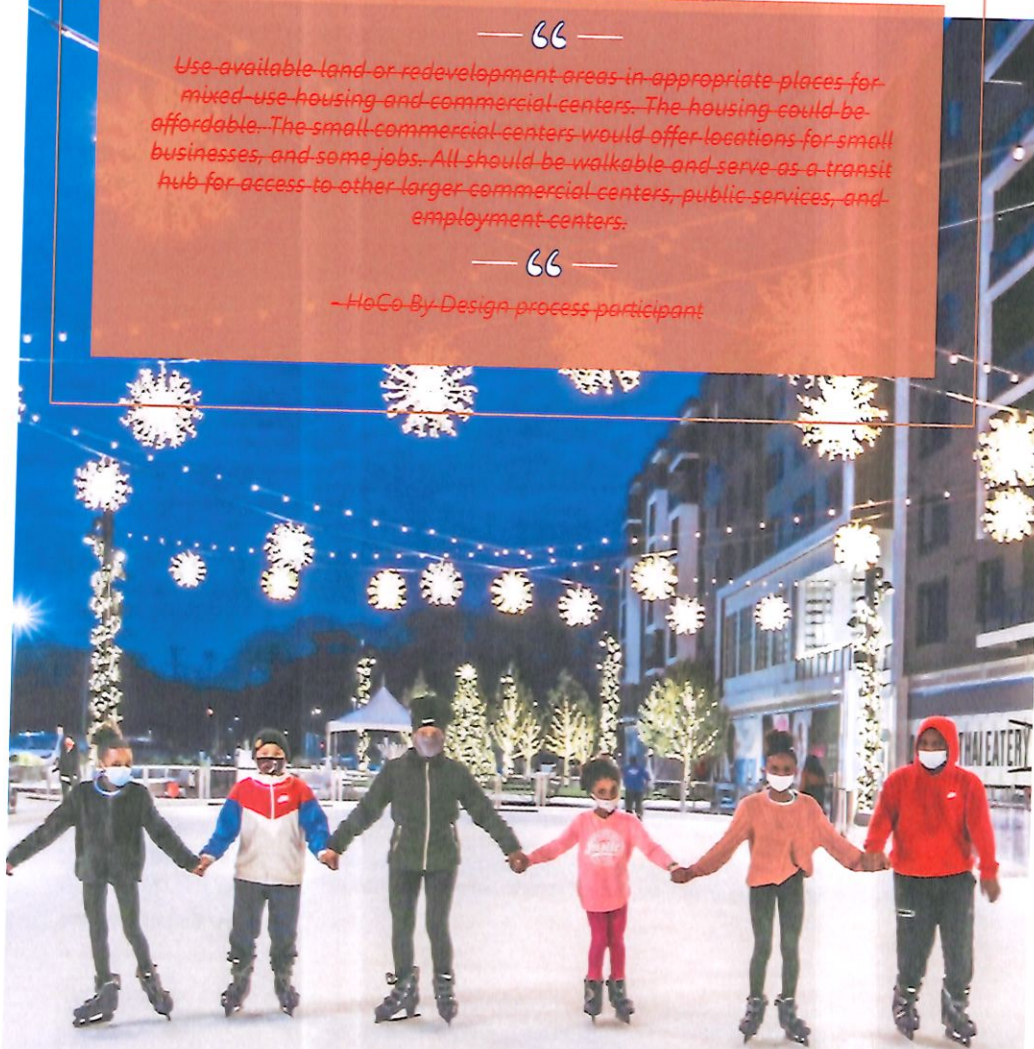
1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.

— 66 —

Use available land or redevelopment areas in appropriate places for mixed-use housing and commercial centers. The housing could be affordable. The small commercial centers would offer locations for small businesses, and some jobs. All should be walkable and serve as a transit hub for access to other larger commercial centers, public services, and employment centers.

— 66 —

- HoCo By Design process participant



Promoting a Healthy Jobs/Housing Balance

To remain an attractive community for today's businesses and their employees, Howard County will need to support new and emerging industries and promote a healthy mix of employment and housing opportunities. Such opportunities include replacing the traditional single-use office park of the 1980s and 1990s with offices integrated into mixed-use settings, as many new businesses desire to locate in walkable activity centers that offer diverse housing options and an amenity rich environment for their employees.

HoCo By Design proposes a variety of activity center character areas at different scales. Activity centers allow for infill opportunities to co-locate diverse housing options and jobs in compact, walkable, mixed-use environments. Furthermore, through deliberate placemaking, these centers can become destinations that incorporate useable and inviting open space, transportation connections, pedestrian and bike facilities, and other amenities to attract employees.

To be self-sufficient, these activity centers must support a variety of businesses. As noted earlier in this chapter, it is estimated that the existing capacity of 10.1 million square feet of new non-residential space could accommodate 28,300 jobs, based on estimated jobs-to-building space ratios. This capacity reflects an average of 1,415 new jobs per year, or less than half of the 3,000+ new jobs per year added in Howard County over the last 20 years. The Future Land Use Map (FLUM) contains character areas with land capacity to accommodate approximately 7,800 retail, 23,000 office, and 4,200 industrial jobs (a total of 35,000 jobs and an average of 1,750 new jobs per year over 20 years). Much of this capacity to accommodate job growth is attributed to proposed mixed-use activity centers and industrial/flex centers along the Route 1 Corridor. The capacity for 35,000 jobs would still fall short of the market demand of 59,000 new jobs by 2040, as indicated in the Market Analysis and Demand Forecast prepared for HoCo By Design. However, these additional jobs could be accommodated in Gateway, which HoCo By Design envisions will serve as a regional activity center with a strong focus on innovation, education, research, and technology.

There is a close relationship between employment growth and housing demand, with new jobs fueling a need for nearby homes. Howard County has fewer housing units for each job than nearly every other jurisdiction in the region, with an estimated undersupply of more than 20,000 units. This metric does not account for new housing needed to support the targeted 3,000 new jobs per year the County seeks to maintain over the planning horizon.

As described in the Dynamic Neighborhoods chapter, the majority of the homes built in Howard County today are higher-end single-family homes. Without more housing choices, it will become more difficult to recruit workers that may be priced out of the local market. Failure to meet the County's workforce housing demands will exacerbate the housing affordability challenge and cause more of the County's workforce to live in neighboring counties—resulting in increased traffic congestion and sprawl.

Greater housing diversity increases economic diversity, contributes to wealth expansion, creates new investments, and drives community growth by attracting young professionals, entrepreneurs, and workers with varied educational and professional backgrounds. While housing is primarily provided by the private sector, public policies will help to ensure a healthy balance of housing at different price points located in the right places. Map 5-5 shows the current locations of housing types relative to activity center locations. As activity centers grow, they can serve as locations for both jobs and housing and can provide amenities and job opportunities to the existing communities surrounding them.

EP-4 Policy Statement

Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.

Implementing Actions

1. Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.
2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village activity center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.
3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.
6. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.



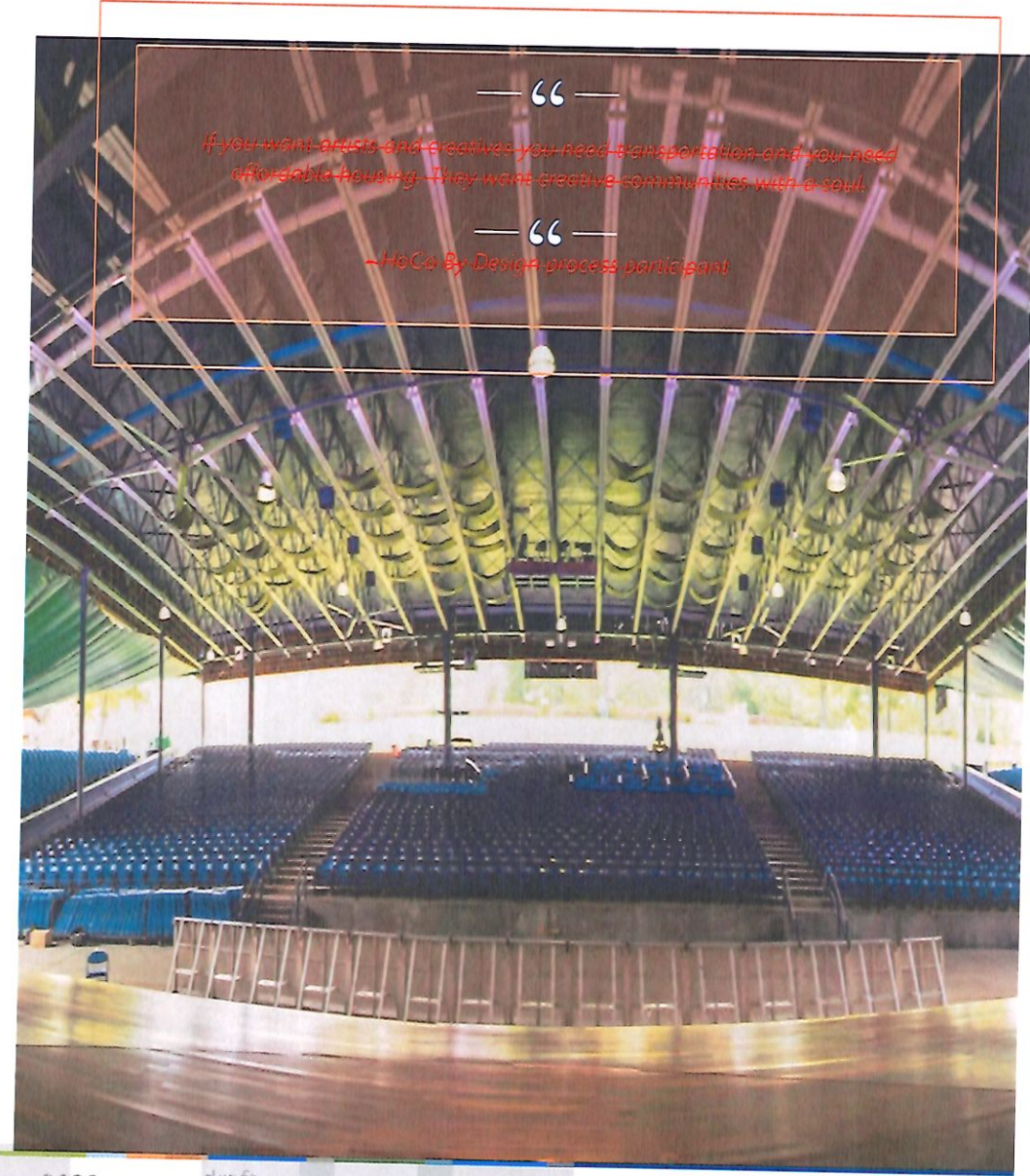
Creating Economic Vibrancy through Arts and Culture

The arts and cultural initiatives are important to many Howard County residents and businesses, enhancing the quality of life and helping to establish a unique sense of place. Such activities also greatly benefit local tourism, offering a destination to those who wish to experience something new and special. Public art instills beauty, character, and a noteworthy signature to particular locations and environments. Incorporating the arts and cultural initiatives into activity centers, main streets, and mixed-use business districts will help to spur further economic activity in these areas of the County.

Artistic and cultural activities, including but not limited to the visual arts, cinema, music, dance, theater and distinctive cultural events, offer opportunities to showcase Howard County's diverse population. The Howard County Arts Council currently advocates and provides for many unique and diverse art experiences in the County. Among the organization's core values is the goal of "cultivating a diverse and inclusive arts culture." The Arts Council operates the multi-purpose Howard County Center for the Arts facility, which provides studio and meeting space and features galleries, classes, and events. The Howard County Tourism Council (Visit Howard County) markets the County as a premier leisure and business travel destination. The Tourism Council collaborates with the County's tourism community "to drive new visitor demand, promotion, product development, and education and advocacy." It will be important to continue to support the Arts Council and Tourism Council, and build upon the work that they do to benefit residents, businesses, and tourists into the future.

At Long Reach Village Center, the arts are an important component of the Long Reach Rising revitalization initiative. The Columbia Art Center has long served as a cultural anchor at the village center and offers gallery space, an artisan shop, and educational programming. The African Art Museum of Maryland, which increases awareness of diverse cultural expression through exhibition of African art, moved to the village center in 2020. Also that year, the Howard County Arts Council began a satellite program to lease studio space to artists at the village center.

Arts and culture are featured prominently in the Downtown Columbia Plan (DCP), which acknowledges the vital role of public art and cultural activities in shaping the cultural history of Columbia. The DCP envisions a dynamic and continuously increasing role for visual and performing arts and identifies locations throughout downtown for public art. The DCP's adoption codified requirements for art in private downtown development. Merriweather Post Pavilion serves as an existing cultural anchor for Downtown Columbia. This open-air concert venue draws many thousands of concert goers annually, and is surrounded by Symphony Woods and the Chrysalis amphitheater, which provide space for festivals and community events.



— “ —
If you want artists and creatives you need transportation and you need affordable housing. They want creative communities with a soul.
— “ —
—HoCo By Design process participant

A countywide arts and culture center in Downtown Columbia was envisioned by the community over 10 years ago and was ultimately incorporated into the DCP. **This vision became reality in 2016 when the New Cultural Center (NCC) was included in the affordable housing plan for Downtown Columbia as one of the public amenities that would also provide mixed-income housing.** The NCC is a redevelopment project planned at the current site of Toby's Dinner Theater. The NCC will include a new theater and commercial kitchen, two black box theaters, a gallery, dance studios, various classrooms/performing arts rooms, and mixed-income housing.

The Ellicott City Watershed Master Plan (ECWMP) supports the expansion of arts-related uses and public art in the Main Street area. It recognizes the potential to grow arts and entertainment offerings, build upon existing arts-related events, and give public art a prominent role in the community. Among its policies and implementing actions, the ECWMP recommends that upon expansion of arts-related uses in the area, a Maryland Arts Council, Arts and Entertainment District designation be re-explored. As described in the ECWMP, "Maryland's A&E Districts provide local tax-related incentives to attract artists, arts organizations, and other creative enterprises to towns and cities within the State." Support for additional arts and entertainment uses in Ellicott City may include incentives, reduced rent, or space in county-owned buildings.

In all of these destinations, investments in design value and quality of the public realm create safe and inviting spaces for pedestrians and cyclists, better wayfinding, improved landscaping, enhanced stormwater management, and spaces for civic gatherings, outdoor events, cultural activities, and the arts. The public realm is further described in the Quality By Design chapter.

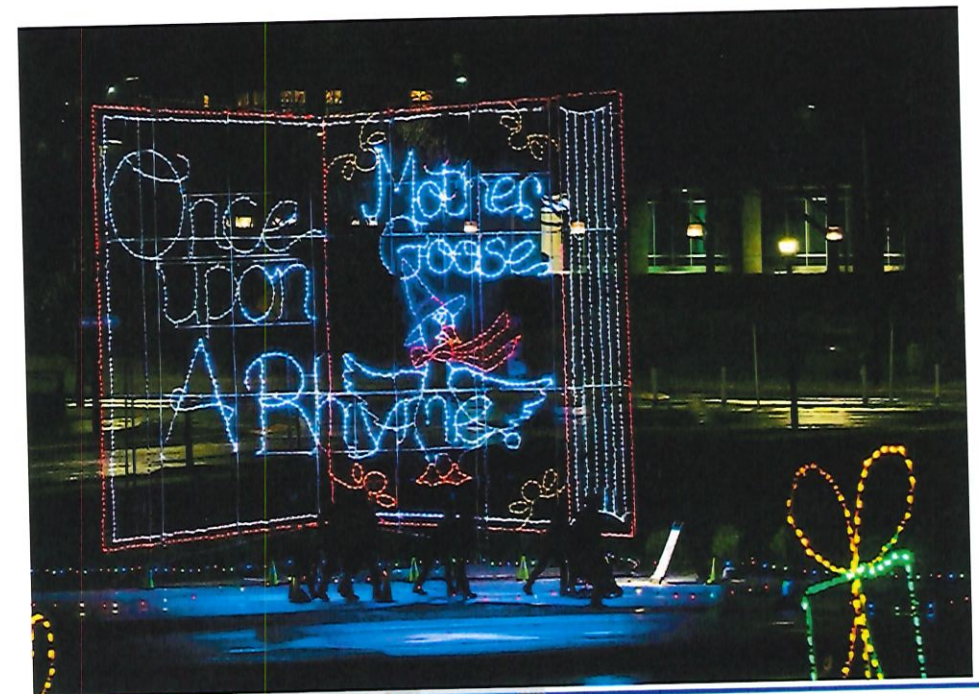


EP-5 Policy Statement

Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses, and visitors that reflect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.

Implementing Actions

1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, **including**
3. **Re-explore** establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.
4. **3.** Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.
5. **Continue to integrate the arts into revitalization efforts at Long Reach Village Center.**
5. **Continue to integrate the arts into revitalization efforts at Long Reach Village Center.**
6. **4. 6.** Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.



Anticipating Future Trends

Economic disruptors and technologies such as autonomous vehicles, teleworking, and e-commerce are likely to lead to demand shifts, requiring future adaptation. New technologies will influence current industries and will likely change land use needs. While in some cases workers will continue to work in office buildings, they may also work in new flex spaces or home offices that are better adapted to the innovation economy. This trend could significantly impact land use demand in Howard County and regionally.

Impact of Covid-19

Despite speculation that Covid-19 and the rise of teleworking would diminish office demand, the need for office space is likely to remain for many businesses and organizations. However, companies are approaching the future of the office differently. Some are shifting to all-remote environments, but most are looking at a hybrid of in-person and remote work in the future. While the internal design of office space may shift to multi-purpose and co-working space, many see the value of a physical office to inspire teambuilding and collaboration. While flagship corporate headquarters may no longer be needed to attract employees, small-scale and regional offices will likely remain in demand. With more employees opting to work remotely, co-working spaces could become an attractive alternative.

Ultimately, as the demand for office space shifts, the location of available space will drive real estate decisions. Places like Columbia are desirable for many office tenants because they feature a central location in a mixed-use environment, walkability, and proximity to retail and other attractions.

E-Commerce and the Future of Retail

E-commerce sales have grown significantly in the last several years, even pre-Covid-19, leading to a rise in physical store closings. Retailers in Howard County will likely choose smaller retail spaces and rely more heavily on “last-mile” inventories stored in local and regional fulfillment centers. When a retailer offers the option to buy online and pick up in-store, the fulfillment center delivers the inventory on-demand from the warehouse to the retail store. The growing need for last-mile distribution to both personal residences and retail stores will likely increase demand for local and regional warehousing.

Industrial land in places along the Route 1 Corridor could provide spaces for last-mile distribution. In the long term, office parks, suburban retail, and other activity centers may be transformed to reflect shifting business models, and large retail stores may become a mix of an in-store and warehouse pick-up.

Emerging theories and trends about the future of the retail sector are changing quickly and sometimes conflict with each other in terms of the magnitude and timing of expected changes. However, most retail market experts agree that customers’ desires for experience-based destinations in the future favor the type of new mixed-use activity centers proposed for Howard County on the Future Land Use Map (FLUM). Restaurants, entertainment venues, services, and retail storefronts organized around a network of walkable streets and public spaces will likely be competitive assets in the new retail market.

Improved Business Technologies and Automation

Industries are already seeing a shift in increased levels of artificial intelligence incorporated into their business models. This trend is likely to impact most industries in the long run, with near-term impacts affecting industrial and office users more than others. New and large machinery and automated processes will require roomier and different types of industrial space with less need for a human workforce as jobs are replaced by machines. Improved and efficient construction techniques may give rise to more affordable manufactured and modular housing. Autonomous check-in and online accommodation marketplaces (such as Airbnb and VRBO) will likely continue to change the hospitality industry in the future.

Autonomous Vehicles

~~Daily commuting is an essential part of life for many Howard County residents and workers. Like the shifts toward telecommuting and innovative workplaces and businesses, autonomous vehicles may alter commuting patterns in the County. Autonomous vehicles, through the deployment of ever-evolving technology, are expected to increase traffic efficiency and reduce travel times. With more efficient commutes, residents could have greater choices in where they wish to live.~~

~~Howard County stands to benefit from autonomous vehicles as reduced commute times may attract workers who currently live closer to large employment centers like Baltimore and Washington, DC. The County may experience an uptick in residential demand if autonomous vehicles become more commonplace and if workers therefore grow less apt to want to live in large city centers.~~

~~Additionally, if the use of autonomous vehicles (or non-vehicular options including electric bicycles, transit, etc.) grows, the need for large parking lots will decline, increasing the availability of land for new housing and businesses. Reduced parking requirements would decrease development costs and increase the opportunity to meet future housing and job demands.~~

EP-6 Policy Statement

Monitor economic disruptors, such as new technologies, autonomous vehicles, teleworking, and e-commerce, and employ adaptive and innovative strategies to meet emerging economic shifts.

Implementing Actions

1. Assess and adapt the Zoning Regulations to provide greater flexibility under broader use categories and respond to changing industries and technologies.
2. Continue to intentionally grow jobs in the manufacturing, warehouse, distribution, and logistics industries in response to last-mile distribution demand, new machinery, innovation practices, and other automated processes.
3. Consider reduced parking ratios for commercial uses if the adoption of ~~autonomous vehicles, other new technologies, or shifts in behavior~~ **lead leading** to reduced parking demand over the Plan’s 20-year timeframe.

Expanding Economic OPPortunity through Workforce and Small Business dEVELOPmEnt

Access to Education and Jobs

Access to education, training, and skills development is critical to closing the opportunity gap in the workforce. Investing in local talent and human resources keeps residents from commuting elsewhere for jobs, improves their quality of life, reduces greenhouse gas emissions and traffic congestion, and keeps dollars circulating in the local economy. Workforce development initiatives provide investment in human capital and can be particularly helpful to individuals of limited financial means. The Howard County Office of Workforce Development, Howard County Economic Development Authority, Howard Community College, and the nonprofit community are all involved in developing a skilled workforce in the County, through career training, professional certification, and apprenticeship programs. The Howard County Public School System offers high schoolers education in specific industries (such as cybersecurity, computer programming, biotechnology, and many other industries) through its career academies. Vocational and technical training should be made accessible to residents near their neighborhoods and at community centers and facilities served by transit. To ensure underserved populations can participate in training, entities involved in workforce development should partner to offer resources such as child care. Training should also support skills that provide living wages. Well-paying industrial jobs, which require training and certification but less than a four-year college degree, could grow in the future.

The Covid-19 pandemic has spurred increased awareness of the importance of broadband access throughout the County. During the pandemic, high-speed internet access was an essential component of remote learning for children and employment for adults. Those without access were left behind academically and economically. It is important to invest in reliable, affordable broadband in underserved areas.

EP-7 Policy Statement



Support an educated and skilled workforce with specific attention and resources devoted to breaking barriers to employment and education while achieving greater racial and social inclusion in the workplace.

Implementing Actions

1. Increase job training, internships, and job placement to overcome barriers to employment and achieve greater racial and social inclusion in the workforce.
2. Partner with organizations that specialize in workforce development to help those experiencing multiple barriers to employment access education, apprenticeship programs, and training opportunities aligned with in-demand local workforce needs.
3. Ensure job training programs support skills that provide living wages.
4. Communicate the available jobs in the region and identify the skills workers need to be successful.
5. Invest in reliable affordable broadband to ensure that lower-income residents have equal access to education and employment opportunities.




Supporting Small, Local, and Minority-Owned Business

Many local businesses provide inviting places to connect with other community members. They are often family-owned and offer fresh, customized approaches that are not found in chains or big-box outlets. However, despite the unique and creative experience these businesses provide, they are traditionally more susceptible to changing economics and redevelopment pressures. Over the past several years, small businesses have faced pandemic disruptions, supply chain problems, and staffing shortages. These recent challenges have left some small businesses struggling to remain afloat, with minority-owned enterprises among the hardest hit.

As technological advances continue to lower the costs of launching new businesses, opportunities for economically-disadvantaged entrepreneurs grow. Ongoing support is critical to assist small local businesses in Howard County as economic changes and redevelopment occur to retain small, culturally diverse businesses that support the local community. Throughout the HoCo By Design public engagement process, small business owners voiced concerns about being priced out of owning a business and noted village centers as ideal locations for small businesses today and a redeveloped Gateway as ideal for the future.

EP-8 Policy Statement

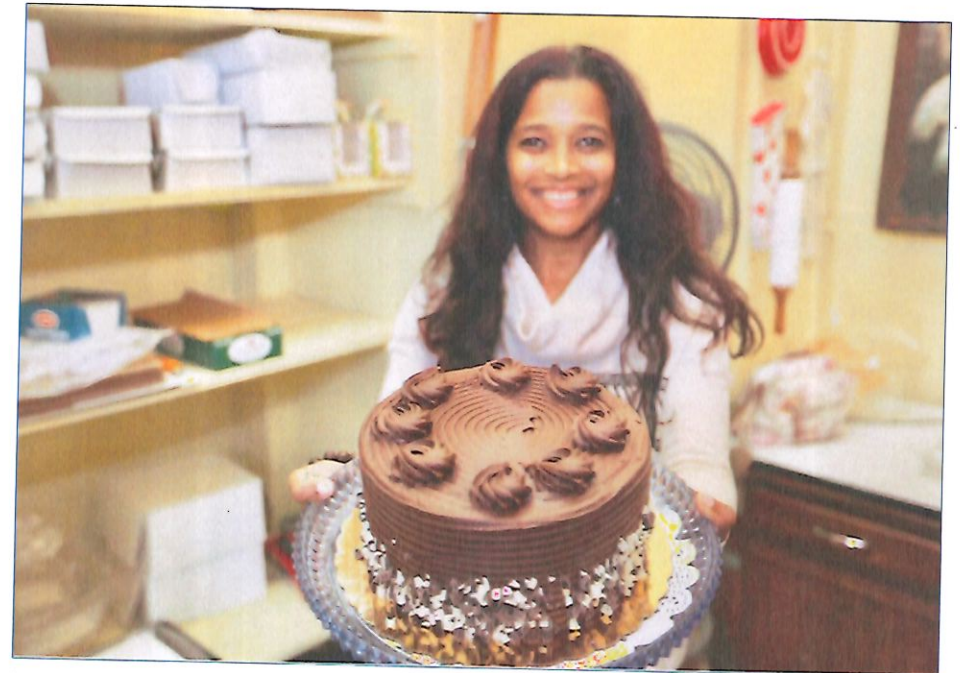
 Encourage a business climate that supports growth of and opportunities for small and diverse businesses, and values cultural diversity and inclusion.

Implementing Actions

1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and Maryland Small Business Development Center.
5. Through adaptive reuse and redevelopment, **particularly within village centers, particularly within activity centers**, provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.

— “ —
There is a lack of local business growth, and especially businesses owned by people of color. Ownership needs to be within reach and other financial supports to get started as it's currently cost prohibitive.

— “ —
—HoCo By Design process participant



Sustaining our Agricultural Economy

Agriculture is an important economic driver in Maryland that contributes to Howard County's thriving economy. According to the 2017 US Department of Agriculture (USDA) Census of Agriculture, farming in the County directly contributes approximately \$27.3 million annually, with an overall economic impact of \$43.7 million. The key contributors to the agricultural economy are horticulture, crop production, livestock production, equine operations, direct to consumer enterprises, and agritourism.

Agriculture in the County faces significant challenges. The availability of affordable farmland, particularly for the next generation of potential farmers, labor shortages, impediments to accessing agricultural infrastructure, and the high cost of insurance threaten the long-term viability of farming. Input costs continue to rise, and profit margins remain slim, which is a reality for agricultural producers nationally and locally. Climate change adds a layer of uncertainty to these challenges. Additionally, conflicts with residential neighbors over on-farm uses restrain farmers' ability to experiment with potentially higher-income operations that draw large numbers of people to the farm.

On the other hand, Howard County offers unique opportunities for farms to diversify their sales channels. County farms are close to residential neighbors who have a growing desire for locally-sourced food and an interest in visiting nearby farms for product, entertainment, and agricultural education. Howard County Government hosts an agricultural subcommittee representing several agencies that, together, buttress the industry through technical and financial assistance and farm-friendly policies and regulations.

As agriculture continues to evolve, the farming community will need flexible and prompt support to prosper and remain competitive. Howard County farmers have been on the forefront of innovation and diversification for years, due to both the challenges and opportunities they face. County policies and regulations should continue to keep pace with changes to farming in the future.

Current Status and Trends

Much of the data that informs the policies and implementing actions for the agricultural industry is derived from the USDA Census of Agriculture, which is conducted every five years and was last completed in 2017. The Census is based on self-reporting and is the most comprehensive source of information regarding agriculture in the County. A detailed analysis of the data provided by the last several USDA Censuses is provided in the Agriculture Assessment prepared for HoCo By Design.

Farmland

In 2017, 321 farms responded to the USDA Census of Agriculture in Howard County. Together, they accounted for 32,436 acres of farmland. USDA's definition of a farm is any place from which \$1,000 or more of agricultural products will be sold or normally are sold within any given year. Compared with Census figures over the previous 15 years, the general trend shows a gradual rate of decline in farm numbers and farm acreage.

— “ —
While direct to consumer markets (farmers markets, pick your own) have done well in Howard County, if agriculture is to continue as an industry, we need to have options/opportunities for larger scale marketing (meat processing facilities, grain handling facilities). The County also needs to allow for conditional uses to allow farmers to diversify into new/emerging opportunities to remain profitable and competitive.

— “ —
— HoCo By Design process participant



EP-9 Policy Statement

Promote and support modern farming initiatives that reflect the changing needs and economic drivers of agriculture in Howard County.

Implementing Actions

1. Support development of appropriately equipped and licensed commercial processing and kitchen facilities that can accommodate various agricultural and food processing needs for farmers and entrepreneurs.
2. Continue and expand business development services that can position agricultural enterprises for growth, innovation, and diversification.
3. Improve opportunities for the growth of e-commerce and last-mile delivery infrastructure, including integration of technological advances in customer delivery.
4. Encourage and enhance agricultural opportunities in the eastern portion of the County.
5. Enhance and expand the partnership between the Agricultural Land Preservation Program, the Howard County Economic Development Authority, the University of Maryland, and the farming community to assist farmers as agriculture continues to evolve and diversify.
6. Consider consolidating offices, services, and educational resources for the farming community in a single location.

EP-10 Policy Statement

Continue and enhance established technical and funding efforts to support the farming community.

Implementing Actions

1. Continue funding for the Howard Soil Conservation District to assist farmers with design and installation of best management practices (BMPs).
2. Consider expanding County assistance to fill gaps in cost share programs for agricultural BMPs.
3. Continue the Howard County Economic Development Authority's Agricultural Marketing Program, including its Agricultural Innovation Grants, business planning, and other financial and technical assistance.
4. Expand the Agricultural Innovation Grants by allocating additional resources and creating opportunities for urban agriculture endeavors in the East.

EP-11 Policy Statement

Support and encourage beginning farmers to build a diverse farming community.

Implementing Actions

1. Support the development of new and continue ongoing agricultural education initiatives that encourage students from a variety of backgrounds to consider agriculture as a career choice.
2. Consider establishing a financing program to help farmers purchase farmland.
3. Establish a grant program for beginning farmers.
4. Consider leasing county-owned land for start-up agricultural businesses.
5. Consider creating a program to loan or share farm equipment.
6. Enhance availability and access to community gardens ~~that can be used by beginning farmers.~~

EP-12 Policy Statement

Reduce regulatory barriers to diversified agricultural operations in both the Rural West and the East.

Implementing Actions

1. Update the Zoning Regulations and other policies to promote agricultural expansion and diversification, especially for on-farm processing and other agribusiness opportunities.
2. Work with agricultural and community stakeholders to review and update the Zoning Regulations and other regulations to create more opportunities for agritourism.
3. Reduce barriers to the burgeoning demand for on-farm breweries, wineries, cideries, meaderies, and distilleries.

EP-13 Policy Statement

Review transportation planning and road development and maintenance standards to reduce transportation barriers to farming.

Implementing Actions

1. Improve rural road conditions by increasing overhead tree clearance and addressing passage at narrow bridges.
2. Reduce conflict between recreational, residential, commercial, and agricultural road uses.

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-3 - Support and diversify the local job market to maximize opportunities to grow regional employment.		
1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.	HCEDA	Mid-Term
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.	HCEDA	Mid-Term
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.	HCEDA	Long-Term

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-4 - Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.		
1. Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.	DPZ	Mid-Term
2. 1. Allow sufficient densities <u>redevelopment</u> in activity centers through the Zoning Regulations to make a wide range of uses economically viable. <u>Encourage densities sufficient to support</u> <u>Require village activity center redevelopment to provide</u> convenience retail and other local- serving amenities at the neighborhood level.	DPZ	Mid-Term
3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.	DPZ OOT	Ongoing
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.	DPZ	Ongoing
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.	DPZ	Mid-Term
6. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.	DHCD DPZ Non-profit sector Private Partners	Ongoing

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+)
EP-5 - Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses and visitors that reflect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.		
1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.	DPZ Private Partners	Ongoing
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, <u>including establishing an Arts and Entertainment (A&E) District Designation for Main Street, Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.</u>	DPW	Mid-Term
3. Re-explore establishing an Arts and Entertainment (A&E) District Designation for Main Street, Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.	DPZ DPW	Long-Term
4. 3. Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.	DPZ DRP DPW	Ongoing
5. Continue to integrate the arts into revitalization efforts at Long Reach Village Center. Continue to integrate the arts into revitalization efforts at Long Reach Village Center.	DPWDPZ DPWDPZ	Ongoing Ongoing
6. 4. Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.	Elected Officials OOB	Ongoing
EP-6 - Monitor economic disruptors, such as new technologies, autonomous vehicles, teleworking, and e-commerce, and employ adaptive and innovative strategies to meet emerging economic shifts.		
1. Assess and adapt the Zoning Regulations to provide greater flexibility under broader use categories and respond to changing industries and technologies.	DPZ HCEDA OOT	Mid-Term
2. Continue to intentionally grow jobs in the manufacturing, warehouse, distribution, and logistics industries in response to last-mile distribution demand, new machinery, innovation practices, and other automated processes.	HCEDA	Long-Term
3. Consider reduced parking ratios for commercial uses if the adoption of <u>autonomous vehicles, other new technologies, or shifts in behavior lead leading</u> to reduced parking demand over the Plan's 20-year timeframe.	DPZ OOT	Mid-Term

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-7 - Support an educated and skilled workforce with specific attention and resources devoted to breaking barriers to employment and education while achieving greater racial and social inclusion in the workplace.		
1. Increase job training, internships, and job placement to overcome barriers to employment and achieve greater racial and social inclusion in the workforce.	HCEDA OWD	Mid-Term
2. Partner with organizations that specialize in workforce development to help those experiencing multiple barriers to employment access education, apprenticeship programs, and training opportunities aligned with in-demand local workforce needs.	HCEDA OWD	Long-Term
3. Ensure job training programs support skills that provide living wages.	HCEDA OWD	Ongoing
4. Communicate the available jobs in the region and identify the skills workers need to be successful.	HCEDA OWD	Mid-Term
5. Invest in reliable affordable broadband to ensure that lower-income residents have equal access to education and employment opportunities.	DTCS Private Partners	Mid-Term
EP-8 - Encourage a business climate that supports growth of and opportunities for small and diverse businesses, and values cultural diversity and inclusion.		
1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.	HCEDA	Ongoing
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.	DPZ DRP DPW	Ongoing
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.	HCEDA DPW DPZ	Ongoing
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and the Maryland Small Business Development Center.	HCEDA	Ongoing
5. Through adaptive reuse and redevelopment, <u>particularly within village centers, particularly within village activity centers</u> , provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.	DPZ HCEDA DPW	Ongoing

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-9 - Promote and support modern farming initiatives that reflect the changing needs and economic drivers of agriculture in Howard County.		
1. Support development of appropriately equipped and licensed commercial processing and kitchen facilities that can accommodate various agricultural and food processing needs for farmers and entrepreneurs.	OCS HCEDA	Mid-Term
2. Continue and expand business development services that can position agricultural enterprises for growth, innovation, and diversification.	HCEDA OCS	Ongoing
3. Improve opportunities for the growth of e-commerce and last-mile delivery infrastructure, including integration of technological advances in customer delivery.	HCEDA OCS OOT	Long-term
4. Encourage and enhance agricultural opportunities in the eastern portion of the County.	OCS HCEDA DPZ	Mid-Term
5. Enhance and expand the partnership between the Agricultural Land Preservation Program, the Howard County Economic Development Authority, the University of Maryland, and the farming community to assist farmers as agriculture continues to evolve and diversify.	HCEDA OCS DPZ Private Partners	Ongoing
6. Consider consolidating offices, services, and educational resources for the farming community in a single location.	OCS HCEDA	Long-Term

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-10 - Continue and enhance established technical and funding efforts to support the farming community.		
1. Continue funding for the Howard Soil Conservation District to assist farmers with design and installation of best management practices (BMPs).	DPZ DPW OCS Elected Officials OOB	Ongoing
2. Consider expanding County assistance to fill gaps in cost share programs for agricultural BMPs.	HCEDA OCS	Mid-Term
3. Continue the Howard County Economic Development Authority's Agricultural Marketing Program, including its Agricultural Innovation Grants, business planning, and other financial and technical assistance.	HCEDA DPZ	Ongoing
4. Expand the Agricultural Innovation Grants by allocating additional resources and creating opportunities for urban agriculture endeavors in the East.	HCEDA DPZ OCS	Long-term
EP-11 - Support and encourage beginning farmers to build a diverse farming community.		
1. Support the development of new and continue ongoing agricultural education initiatives that encourage students from a variety of backgrounds to consider agriculture as a career choice.	HCEDA	Mid-Term
2. Consider establishing a financing program to help farmers purchase farmland.	HCEDA	Mid-Term
3. Establish a grant program for beginning farmers.	HCEDA OCS	Mid-Term
4. Consider leasing county-owned land for start-up agricultural businesses.	DPW HCEDA DPZ DRP	Mid-Term
5. Consider creating a program to loan or share farm equipment.	HCEDA	Mid-Term
6. Enhance availability and access to community gardens that can be used by beginning farmers.	DRP OCS DPZ	Mid-Term

Amendment 1 to Amendment 74 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 12

Date: 10/11/2023

(This Amendment to Amendment 74 substitutes activity centers for village centers in the EP-4 and EP-8 Policy Statement Implementing Actions and restores an integration of the arts into revitalization efforts at Long Reach Village Center in the EP-5 Policy Statement Implementing Actions.)

- 1 Substitute pages 1 and 2 of Amendment 74 with the attachment to this Amendment to
- 2 Amendment.
- 3
- 4 Substitute the pages EP-37, EP-44, EP-49, IMP-30, IMP-31, and IMP-32 attached to
- 5 Amendment 74 with the pages EP-37, EP-44, EP-49, IMP-30, IMP-31, and IMP-32 attached to
- 6 this Amendment to Amendment.
- 7

I certify this is a true copy of

Am 1 Am 74 CB 28-2023

passed on 10/11/2023

Nichelle L. Davis

Council Administrator

LEG 1967

Amendment 74 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 11

Date: 10/02/2023

Amendment No. 74

(This Amendment makes the following changes to HoCo by Design Chapter 5 and Chapter 11:

- Chapter 5: Economic Prosperity*
- *Removes all quotes;*
 - *Amends the projected housing from 30,000 to 31,000 and enumerates the projection based on housing type;*
 - *Renames the “Promoting a Healthy Jobs/Housing Balance” Section to “Promoting Healthy Jobs” and removes all but the first two paragraphs;*
 - *Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, allow redevelopment in Activity Centers that provides convenient retail and services, and removes the creation of housing for County essential workers;*
 - *Removes a reference to New Cultural Center;*
 - *Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City ~~and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;~~*
 - *Removes the entire section titled “Autonomous Vehicles”;*
 - *Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;*
 - *Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers and substitute activity centers;*
 - *Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens;*
- Chapter 11: Implementation*
- *Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, allow redevelopment in Activity Centers that provides convenient retail and services, and removes the creation of housing for County essential workers;*
 - *Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City ~~and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;~~*

- Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;
- Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers and substitute activity centers ; and
- Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens.)

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 5, Economic Prosperity: 10, 11, 14, 30, 33, 35, 36, 37, 42, 43, 44, 46, 48, 49, 50,
4 52, and 60;

5 • Chapter 11: Implementation: 30, 31, 32, and 34.

6 Correct all page numbers, numbering, and formatting within this Act to accommodate this
7 amendment.

8

Greater housing diversity increases economic diversity, contributes to wealth expansion, creates new investments, and drives community growth by attracting young professionals, entrepreneurs, and workers with varied educational and professional backgrounds. While housing is primarily provided by the private sector, public policies will help to ensure a healthy balance of housing at different price points located in the right places. Map 5-5 shows the current locations of housing types relative to activity center locations. As activity centers grow, they can serve as locations for both jobs and housing and can provide amenities and job opportunities to the existing communities surrounding them.

EP-4 Policy Statement

Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.

Implementing Actions

1. ~~Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.~~
2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village activity center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.
3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.
6. ~~Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.~~



A countywide arts and culture center in Downtown Columbia was envisioned by the community over 10 years ago and was ultimately incorporated into the DCP. **This vision became reality in 2016 when the New Cultural Center (NCC) was included in the affordable housing plan for Downtown Columbia as one of the public amenities that would also provide mixed-income housing.** The NCC is a redevelopment project planned at the current site of Toby's Dinner Theater. The NCC will include a new theater and commercial kitchen, two black box theaters, a gallery, dance studios, various classrooms/performing arts rooms, and mixed-income housing.

The Ellicott City Watershed Master Plan (ECWMP) supports the expansion of arts-related uses and public art in the Main Street area. It recognizes the potential to grow arts and entertainment offerings, build upon existing arts-related events, and give public art a prominent role in the community. Among its policies and implementing actions, the ECWMP recommends that upon expansion of arts-related uses in the area, a Maryland Arts Council, Arts and Entertainment District designation be re-explored. As described in the ECWMP, "Maryland's A&E Districts provide local tax-related incentives to attract artists, arts organizations, and other creative enterprises to towns and cities within the State." Support for additional arts and entertainment uses in Ellicott City may include incentives, reduced rent, or space in county-owned buildings.

In all of these destinations, investments in design value and quality of the public realm create safe and inviting spaces for pedestrians and cyclists, better wayfinding, improved landscaping, enhanced stormwater management, and spaces for civic gatherings, outdoor events, cultural activities, and the arts. The public realm is further described in the Quality By Design chapter.



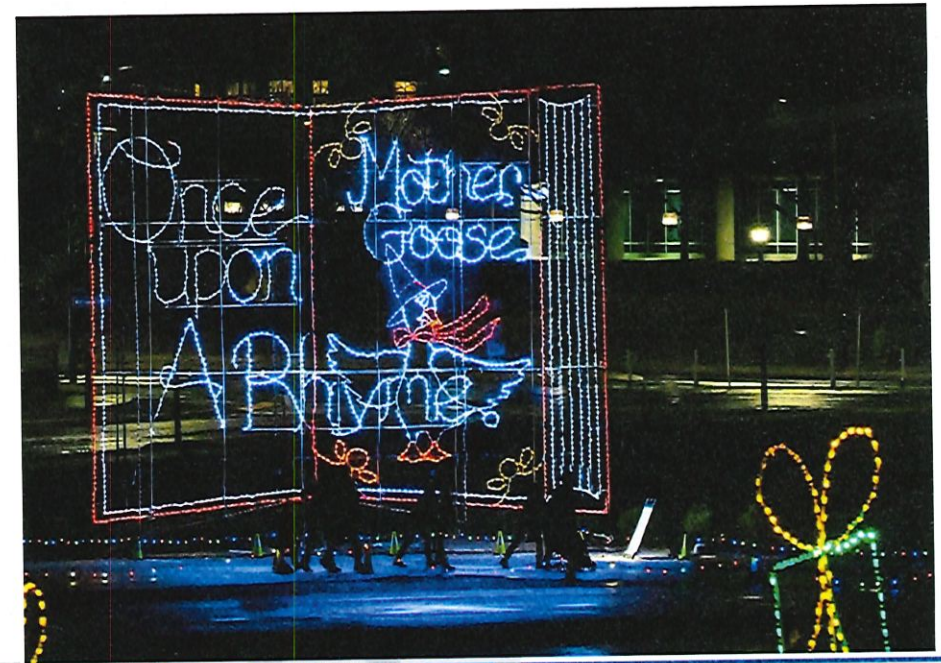
EP-5 Policy Statement

Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses, and visitors that reflect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.

Implementing Actions



1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, **including**
3. **Re-explore** establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.
4. **3.** Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.
5. **Continue to integrate the arts into revitalization efforts at Long Reach Village Center.**
5. **Continue to integrate the arts into revitalization efforts at Long Reach Village Center.**
6. **4, 6.** Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.



Supporting Small, Local, and Minority-Owned Business

Many local businesses provide inviting places to connect with other community members. They are often family-owned and offer fresh, customized approaches that are not found in chains or big-box outlets. However, despite the unique and creative experience these businesses provide, they are traditionally more susceptible to changing economics and redevelopment pressures. Over the past several years, small businesses have faced pandemic disruptions, supply chain problems, and staffing shortages. These recent challenges have left some small businesses struggling to remain afloat, with minority-owned enterprises among the hardest hit.

As technological advances continue to lower the costs of launching new businesses, opportunities for economically-disadvantaged entrepreneurs grow. Ongoing support is critical to assist small local businesses in Howard County as economic changes and redevelopment occur to retain small, culturally diverse businesses that support the local community. Throughout the HoCo By Design public engagement process, small business owners voiced concerns about being priced out of owning a business and noted village centers as ideal locations for small businesses today and a redeveloped Gateway as ideal for the future.

EP-8 Policy Statement



Encourage a business climate that supports growth of and opportunities for small and diverse businesses, and values cultural diversity and inclusion.

Implementing Actions

1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and Maryland Small Business Development Center.
5. Through adaptive reuse and redevelopment, **particularly within village centers, particularly within activity centers**, provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.

“There is a lack of local business growth, and especially businesses owned by people of color. Ownership needs to be within reach and other financial supports to get started as it's currently cost prohibitive.”

— HoCo By Design process participant



Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-3 - Support and diversify the local job market to maximize opportunities to grow regional employment.		
1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.	HCEDA	Mid-Term
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.	HCEDA	Mid-Term
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.	HCEDA	Long-Term

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-4 - Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.		
1. Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.	DPZ	Mid-Term
2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village activity center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.	DPZ	Mid-Term
3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.	DPZ OOT	Ongoing
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.	DPZ	Ongoing
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.	DPZ	Mid-Term
6. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.	DHCD DPZ Non-profit sector Private Partners	Ongoing

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+)
EP-5 - Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses and visitors that reflect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.		
1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.	DPZ Private Partners	Ongoing
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, <u>including establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.</u>	DPW	Mid-Term
3. Re-explore establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.	DPZ DPW	Long-Term
4. 3. Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.	DPZ DRP DPW	Ongoing
5. Continue to integrate the arts into revitalization efforts at Long Reach Village Center. <u>5. Continue to integrate the arts into revitalization efforts at Long Reach Village Center.</u>	DPW DPZ DPW DPZ	Ongoing Ongoing
6. 4. 6. Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.	Elected Officials OOB	Ongoing
EP-6 - Monitor economic disruptors, such as new technologies, autonomous vehicles, teleworking, and e-commerce, and employ adaptive and innovative strategies to meet emerging economic shifts.		
1. Assess and adapt the Zoning Regulations to provide greater flexibility under broader use categories and respond to changing industries and technologies.	DPZ HCEDA OOT	Mid-Term
2. Continue to intentionally grow jobs in the manufacturing, warehouse, distribution, and logistics industries in response to last-mile distribution demand, new machinery, innovation practices, and other automated processes.	HCEDA	Long-Term
3. Consider reduced parking ratios for commercial uses if the adoption of autonomous vehicles, other new technologies, or shifts in behavior <u>lead leading</u> to reduced parking demand over the Plan's 20-year timeframe.	DPZ OOT	Mid-Term

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-7 - Support an educated and skilled workforce with specific attention and resources devoted to breaking barriers to employment and education while achieving greater racial and social inclusion in the workplace.		
1. Increase job training, internships, and job placement to overcome barriers to employment and achieve greater racial and social inclusion in the workforce.	HCEDA OWD	Mid-Term
2. Partner with organizations that specialize in workforce development to help those experiencing multiple barriers to employment access education, apprenticeship programs, and training opportunities aligned with in-demand local workforce needs.	HCEDA OWD	Long-Term
3. Ensure job training programs support skills that provide living wages.	HCEDA OWD	Ongoing
4. Communicate the available jobs in the region and identify the skills	HCEDA	Mid-Term
5. Invest in reliable affordable broadband to ensure that lower-income residents have equal access to education and employment opportunities.	DTCS Private Partners	Mid-Term
EP-8 - Encourage a business climate that supports growth of and opportunities for small and di-		
1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.	HCEDA	Ongoing
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.	DPZ DRP DPW	Ongoing
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.	HCEDA DPW DPZ	Ongoing
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and the Maryland Small Business Development Center.	HCEDA	Ongoing
5. Through adaptive reuse and redevelopment, particularly within village centers, particularly within activity centers, provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.	DPZ HCEDA DPW	Ongoing

Amendment 2 to Amendment No. 74 to Council Bill No. 28 -2023

BY: Christiana Rigby

Legislative Day: 12

Date: 10/11/2023

(This Amendment to Amendment 74 restores Implementing Actions # 6 of Policy Statement EP-4 which creates opportunities to house the County's essential workers.)

- 1 Substitute page 1 of the Amendment with the attachment page 1 to this
- 2 Amendment to Amendment.
- 3
- 4 Substitute the following pages attached to Amendment 74 with the pages attached to this
- 5 Amendment to Amendment:
- 6 Chapter 5, Economic Prosperity: 37;
- 7 Chapter 11: Implementation: 30.
- 8

I certify this is a true copy of

Amd Am 74 CB28-2023

10/11/2023

Michaela Howard
Council Administrator

Failed

LEG1948

Amendment No. 74 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day: 11

Date: 10/02/2023

Amendment No. 74

(This Amendment makes the following changes to HoCo by Design Chapter 5 and Chapter 11:

- Chapter 5: Economic Prosperity
- Removes all quotes;
 - Amends the projected housing from 30,000 to 31,000 and enumerates the projection based on housing type;
 - Renames the "Promoting a Healthy Jobs/Housing Balance" Section to "Promoting Healthy Jobs" and removes all but the first two paragraphs;
 - Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, **and allow redevelopment in Activity Centers that provides convenient retail and services, and remove the creation of housing for County essential workers;**
 - Removes a reference to New Cultural Center;
 - Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;
 - Removes the entire section titled "Autonomous Vehicles";
 - Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;
 - Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers;
 - Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens;
- Chapter 11: Implementation
- Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, **and allow redevelopment in Activity Centers that provides convenient retail and services, and remove the creation of housing for County essential workers;**
 - Removes a reference to New Cultural Center;
 - Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;

Greater housing diversity increases economic diversity, contributes to wealth expansion, creates new investments, and drives community growth by attracting young professionals, entrepreneurs, and workers with varied educational and professional backgrounds. While housing is primarily provided by the private sector, public policies will help to ensure a healthy balance of housing at different price points located in the right places. Map 5-5 shows the current locations of housing types relative to activity center locations. As activity centers grow, they can serve as locations for both jobs and housing and can provide amenities and job opportunities to the existing communities surrounding them.

EP-4 Policy Statement

Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.

Implementing Actions

1. ~~Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land-use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.~~
2. ~~1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.~~
3. ~~2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.~~
4. ~~3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.~~
5. ~~4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.~~
6. ~~Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.~~
5. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.



Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-3 - Support and diversify the local job market to maximize opportunities to grow regional employment.		
1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.	HCEDA	Mid-Term
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.	HCEDA	Mid-Term
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.	HCEDA	Long-Term

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term)
EP-4 - Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs- housing balance.		
1. Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.	DPZ	Mid-Term
2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.	DPZ	Mid-Term
2. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.	DPZ OOT	Ongoing
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.	DPZ	Ongoing
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.	DPZ	Mid-Term
6. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel. 5. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.	DHCD-DPZ Non-profit sector Private Partners DHCD DPZ Non-profit sector Private Partners	Ongoing Ongoing

Amendment 74 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 11
Date: 10/02/2023

Amendment No. 74

(This Amendment makes the following changes to HoCo by Design Chapter 5 and Chapter 11:

Chapter 5: Economic Prosperity

- *Removes all quotes;*
- *Amends the projected housing from 30,000 to 31,000 and enumerates the projection based on housing type;*
- *Renames the "Promoting a Healthy Jobs/Housing Balance" Section to "Promoting Healthy Jobs" and removes all but the first two paragraphs;*
- *Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, allow redevelopment in Activity Centers that provides convenient retail and services, and remove the creation of housing for County essential workers;*
- *Removes a reference to New Cultural Center;*
- *Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;*
- *Removes the entire section titled "Autonomous Vehicles";*
- *Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;*
- *Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers;*
- *Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens;*

Chapter 11: Implementation

- *Amends the EP-4 Policy Statement Implementing Actions to remove a requirement to amend the Zoning Regulations for Activity Centers, allow redevelopment in Activity Centers that provides convenient retail and services, and remove the creation of housing for County essential workers;*
- *Amends the EP-5 Policy Statement Implementing Actions to combine a study for incentivizing arts and entertainment in Ellicott City and remove a requirement to integrate arts and revitalization efforts at Long Reach Village Center;*

- *Amends the EP-6 Policy Statement Implementing Actions to remove a reference to autonomous vehicles from a consideration of reducing parking ratios to accommodate future technology;*
- *Amends the EP-8 Policy Statement Implementing Actions to remove a reference to village centers; and*
- *Amends the EP-11 Policy Statement Implementing Actions to remove a reference to beginning farmers having access to community gardens.)*

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 5, Economic Prosperity: 10, 11, 14, 30, 33, 35, 36, 37, 42, 43, 44, 46, 48, 49, 50,
4 52, and 60;
- 5 • Chapter 11: Implementation: 30, 31, 32, and 34.

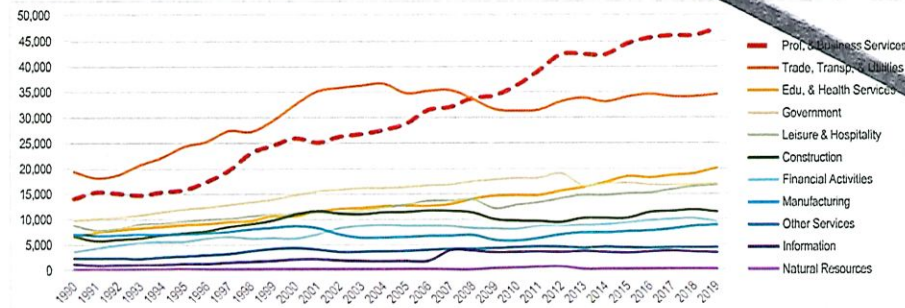
6 Correct all page numbers, numbering, and formatting within this Act to accommodate this
7 amendment.

8

Existing Market and Land Use Conditions

Howard County is located in the center of the nation's fourth largest metropolitan area. This has positioned the County as a regional employment center, attracting both business and job-seekers from across central Maryland and the nation as a whole. Over the last ten years, an average of more than 3,000 new jobs per year have been added to the County's employment base. Key employment sectors in the County include professional and business services; trade, transportation, and utilities; and education and health services. Growth in these sectors—particularly the professional and business services sector—is partly attributed to the County's favorable location in the broader Baltimore-Washington region, as well as Howard County's reputation as an attractive place to live and do business.

Graph 5-1: Historical Employment by Sector, 1990-2019, Howard County, MD



Source: Bureau of Labor Statistics, RCLCO

This trend in job growth is expected to continue over the next 20 years, as the regional job market continues to grow. The HoCo By Design team evaluated baseline conditions and emerging trends in a series of assessments completed in late 2020. The Market Research and Demand Forecast completed at that time projects Howard County could be home to up to 282,000 jobs by 2040, an increase of 59,000 jobs from estimated totals in 2019. By continuing to attract a diverse and highly-talented pool of workers, Howard County will earn its share of regional jobs. But capturing this share requires accessibility to workforce housing, transit, and other lifestyle amenities.

Growing local jobs will also help expand the County's commercial tax base, which was a key recommendation in the FY22 Spending Affordability Advisory Committee (SAAC) Report. The SAAC is tasked with annually reviewing County revenues and expenditures, and making recommendations on revenue projections, bond authorizations, long-term fiscal outlook, and other findings or recommendations that the committee deems appropriate.

According to the SAAC FY22 report, "[b]oosting commercial-base development is one of the most promising strategies to help rebalance the expenditure needs and fiscal resources. The County should continue to build on its current strengths in developing and implementing comprehensive strategies to promote, retain, and expand its commercial base." The report further detailed the importance of the General Plan in guiding development decisions that consider fiscal impacts on the County's budget and maintaining existing commercially zoned land to allow for additional commercial development. This conclusion was reiterated in the FY23 SAAC report, which called for the General Plan to encourage redevelopment and commercial growth in defined employment centers.



— CC —
A strong Howard County economy is important. It brings tax dollars in and supports County infrastructure, activities, etc. Local entertainment is also desirable so that we do not have to travel far to get it.
 — CC —
 — HoCo By Design process participant

Current Jobs and Unemployment

According to the Maryland Department of Labor, there were over 174,000 jobs in Howard County in 2020. As indicated in Table 5-1, Howard County had the 6th greatest number of jobs in Central Maryland and the 2nd greatest 10-year job growth rate at 23.5%, just behind the 24.5% growth rate experienced in Anne Arundel County. Montgomery County had the greatest number of jobs in Central Maryland, followed by Baltimore City and the other large counties surrounding Howard County.

Table 5-1: Jobs in Central Maryland

	2010		2020		2010 to 2020	
	Jobs	Percent	Jobs	Percent	Jobs	% Increase
Montgomery County	433,226	22%	469,462	21%	36,236	8.4%
Baltimore City	320,403	16%	389,738	17%	69,335	21.6%
Baltimore County	355,189	18%	374,165	17%	18,976	5.3%
Prince George's County	292,271	15%	318,755	14%	26,484	9.1%
Anne Arundel County	220,228	11%	274,102	12%	53,874	24.5%
Howard County¹	141,169	7%	174,390	8%	33,221	23.5%
Frederick County	89,106	4%	104,013	5%	14,907	16.7%
Harford County	78,828	4%	93,784	4%	14,956	19.0%
Carroll County	52,772	3%	57,571	3%	4,799	9.1%
TOTAL	1,983,192	100%	2,255,980	100%	272,788	13.8%

Source: Maryland Department of Labor (1st quarter)

Table 5-2 shows the major employers in Howard County, based on information provided by the Howard County Economic Development Authority (HCEDA). Howard County continues to be an attractive place for large businesses. However, as important as large companies may be, HCEDA's Strategic Plan suggests that fostering small to mid-size companies should be prioritized to achieve maximum future job growth. As new businesses expand, new job opportunities will arise, particularly in the professional and business services and technology sectors.

Given the highly-educated workforce in Howard County, the unemployment rate is typically among the lowest in Maryland. As of August 2021, the unemployment rate in Howard County was 4.3%, compared to 5.8% in Maryland and 5.2% in the US. It is anticipated that the unemployment rate will remain low in Howard County over the next 20 years as the County's job base and population continue to grow. Howard County's location in the middle of the Baltimore and Washington regions will continue to be an asset, attracting new businesses and offering opportunities for residents to find work that matches their education and skills.

Market Demand Conditions

In addition to projecting the need for ~~30,000~~ **31,000** new housing units, the Market Research and Demand Forecast projected the need for 16.5 million square feet of commercial space and 1,000 hotel rooms. The commercial space needs are broken down by industry in Table 5-3 and housing units are broken down by type.¹ [The housing unit projection includes demand for 20,000 homeownership opportunities \(single family attached, detached, and condos\) and 11,000 apartment units.](#)

Table 5-2: Howard County's Largest Private Employers (2022)

Employer	Estimated Employees	Product/Service
Johns Hopkins Applied Physics Laboratory	7,200	R&D systems engineering
Howard County General Hospital	1,800	Medical services
Verizon	1,700	Telecommunications
Howard Community College	1,400	Higher education
The Columbia Association	1,200	Nonprofit civic organization
Lorien Health Systems	1,190	Nursing care
Coastal Sunbelt Produce	1,050	Food products distribution
Nestle Dreyer's Ice Cream	835	Frozen desserts
Freshly	820	Prepared meals manufacturing
Wells Fargo	810	Financial services
Maxim Healthcare Services	675	HQ/Medical staffing, wellness
Oracle	650	Software development
W.R. Grace & Co.	600	HQ/Chemical R&D
Sysco Food Services	515	Food products distribution
Enterprise Community Partners	505	HQ/Community development

Note: Excludes post offices and state and local governments

Source: HCEDA Research

Table 5-3: Summary of Demand 2020-2040

	Cumulative Demand By 5-Year Increment			
	2025	2030	2035	2040
Single-Family Detached (units)	3,428	5,808	7,996	9,807
Single-Family Attached (units)	2,743	4,685	6,502	8,033
Rental Apartment (units)	3,626	6,320	8,947	11,249
For-Sale Condominium (units)	437	859	1,361	1,884
Office (sf)	1,828,711	3,289,007	4,741,323	6,315,129
Flex (sf)	317,406	564,815	792,410	1,030,921
Industrial (sf)	2,358,227	4,164,086	5,570,199	7,150,158
Retail (sf)	642,400	1,125,800	1,603,300	2,037,600
Hotel (keys)	246	509	752	1,019

¹ As previously noted, RCLCO's Market Research and Demand Forecast projected a 59,000 increase in jobs by 2040. To arrive at this figure, RCLCO first examined Baltimore Metropolitan Council (BMC) projections for the region, then used Moody's Analytics projections to distribute regional growth by industry (adjusting for COVID-19 impacts), and finally determined the County's future share of regional industry growth using historical trends. RCLCO then projected household growth based on this projected employment growth, arriving at a projected need for 31,000 new housing units in the County. In addition to projecting the need for 31,000 new housing units, the Market Research and Demand Forecast projected the need for 16.5 million square feet of commercial space and 1,000 hotel rooms. RCLCO projected demand for office, flex, and industrial space by estimating the type of space and square footage needed to accommodate each new employee by industry; projections for hotel rooms were based on the current ratio between jobs in the County and hotel rooms. RCLCO projected demand for retail space based on estimated spending from new households and employees (adjusting for online spending).

Commercial

Commercial land uses comprise 3%, or approximately 6.9 square miles, of land in the County. Included in this category are retail, office, hotel, and service-oriented business uses. As shown in Map 5-1, these uses are primarily concentrated along major roads—Route 29, Route 1, and Route 40—or in suburban activity centers such as Downtown Columbia, Maple Lawn (including the neighboring Johns Hopkins Applied Physics Laboratory), and the Columbia Gateway area. Other locations are scattered throughout the County.

Most residents and employees will shop in-person near their home or place of work, while certain destinations are likely to draw users from across Howard County for specific shopping needs. Commercial uses are expected to be heavily concentrated in denser and/or more accessible parts of the County, such as Columbia, where office and retail demand is likely to be strongest. However, declining demand for “brick and mortar” retail and the changing needs of office users may lead to workplace transformations.

Based on the Department of Planning and Zoning (DPZ) land use database and CommunityViz modeling, it is estimated that there is potential to build about 10.1 million square feet of new non-residential building space in Howard County under current zoning, as shown in Table 5-4. This figure includes an additional 4.7 million square feet planned for Downtown Columbia. The Market Research and Demand Forecast indicated that there is a potential market demand in Howard County for 16.5 million square feet of new non-residential building space through the year 2040. As such, a shortfall of about 6.4 million square feet, or 38%, exists.

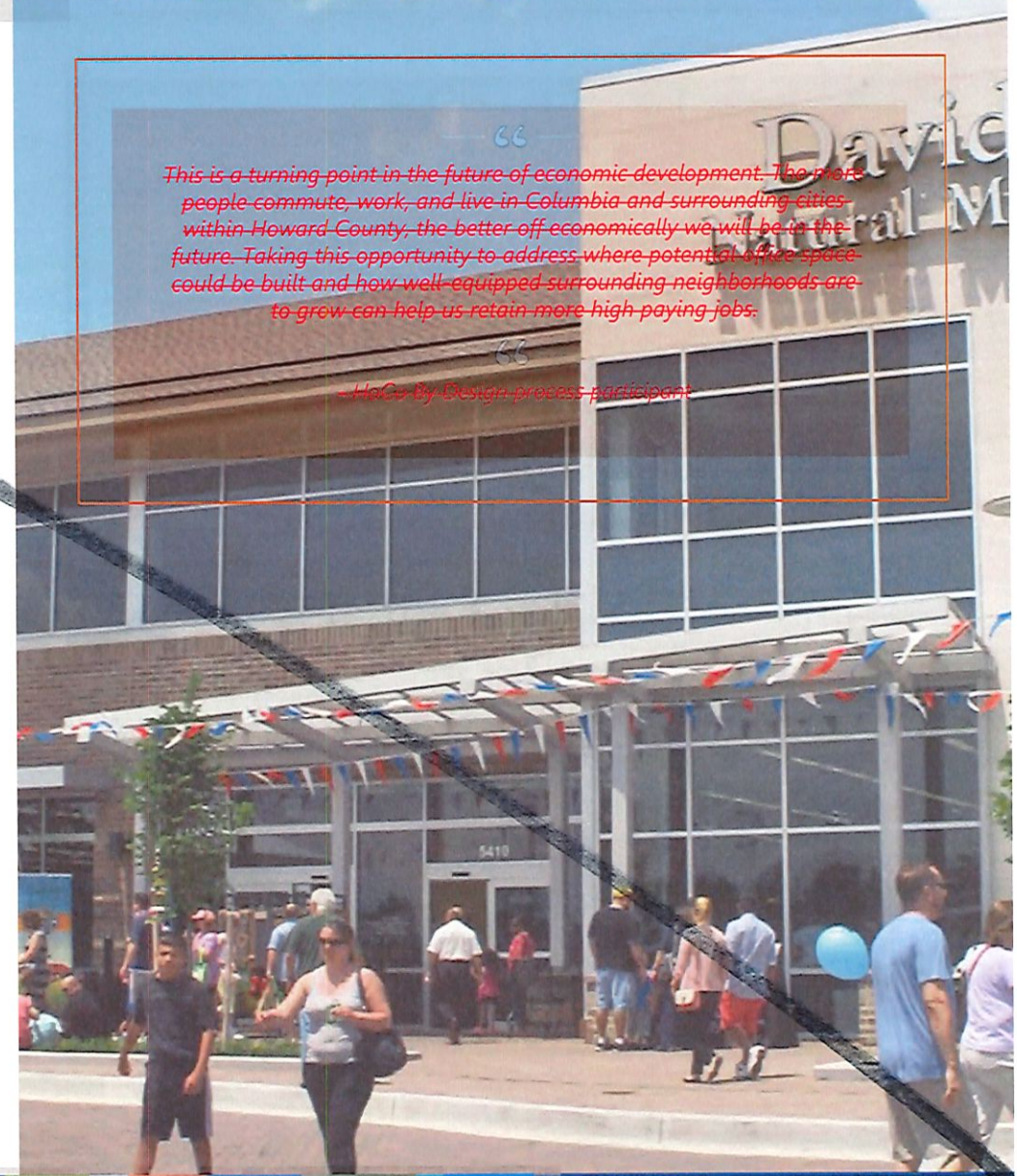
Table 5-4: Non-residential Jobs and Building Square Feet Potential Under Current Zoning and Undeveloped Land Capacity in Howard County

Non-Residential Building Type	Square Feet (X 1,000)	Estimated Jobs
Retail	1,700	4,100
A/B+ Office	5,200	17,300
B/C/Flex Office	800	2,600
Total	10,100	28,300

Source: DPZ Land Use Database and CommunityViz modeling

The existing capacity of 10.1 million square feet of non-residential space is estimated to accommodate 28,300 jobs, based on current jobs to building space ratios. This is less than half of the market demand of 59,000 new jobs over 20 years. This additional job demand could be accommodated through redevelopment opportunities in the activity centers and other non-residential character areas as identified on the Future Land Use Map (FLUM). These places can meet the greater market demand for non-residential space.

The greatest opportunity to accommodate the additional job demand would be the redevelopment of the large Regional Activity Center shown on the FLUM (the current Gateway office park). A master plan for Gateway could explore a variety of mixed-use development opportunities. Development in Gateway will extend beyond 2040 and could therefore accommodate additional demand after the 20-year timeframe of this Plan.



This is a turning point in the future of economic development. The more people commute, work, and live in Columbia and surrounding cities within Howard County, the better off economically we will be in the future. Taking this opportunity to address where potential office space could be built and how well-equipped surrounding neighborhoods are to grow can help us retain more high-paying jobs.

—HoCo By Design process participant

Retaining Industrial Lands

Industrial land loss is common in urban and suburban areas where higher-value commercial and residential uses compete for scarce land supply. However, industrial jobs, particularly the manufacturing, distribution, and warehousing sectors, not only supply the region with goods but also address wage inequality by providing middle-income wages in jobs that do not require an advanced education, as shown in Table 5-5. With only 3% of the land in Howard County available for industrial uses and a limited supply of large industrially zoned properties, the County must enact policies and regulations and make thoughtful planning decisions that ensure the long-term viability of the industrial economy.

Table 5-5: Howard County Annual Average Employment and Wages by Industry

CALENDAR YEAR 2020		
INDUSTRY	ANNUAL AVERAGE EMPLOYMENT	AVERAGE WEEKLY WAGE PER WORKER
GOVERNMENT SECTOR -- TOTAL	16,210	\$1,329.00
Federal Government	740	\$1,598.00
State Government	1,731	\$1,369.00
Local Government	13,740	\$1,309.00
PRIVATE SECTOR TOTAL -- ALL INDUSTRIES	145,159	\$1,553.00
GOODS-PRODUCING	19,932	\$1,553.00
Natural Resources and Mining	301	\$1,001.00
Construction	10,962	\$1,516.00
Manufacturing	8,669	\$1,620.00
SERVICE PROVIDING	125,223	\$1,552.00
Trade, Transportation, and Utilities	32,526	\$1,287.00
Information	3,588	\$3,040.00
Financial Activities	9,480	\$1,927.00
Professional and Business Services	45,528	\$2,080.00
Education and Health Services	18,278	\$1,061.00
Leisure and Hospitality	11,894	\$476.00
Other Services	3,929	\$916.00

Source: Maryland Department of Labor

“
 Route 1 has been industrial for decades and has the infrastructure.
 Industrial is important to the County tax base and needs to be
 encouraged.
 ”
 —HoCo By-Design process participant

HoCo By Design establishes two industrial based character areas: Industrial and Industrial Mixed-Use. The Industrial Character Area supports both larger-scale, single-user industrial, warehouse, and flex spaces and smaller, multi-tenant industrial buildings that are clustered and support one another. The Industrial Mixed-Use Character Area is designed with Route 1 activity centers in mind. This character area is applied to select nodes along the Corridor that are positioned for mixed-use development but contain existing industrial uses that may be integrated into future redevelopment, as shown in Map 5-4. This character area advances dual goals of providing redevelopment opportunities and preserving industrial uses.

As noted earlier in this chapter, while most of the County’s industrial land uses are located in the Route 1 Corridor, a portion is located in eastern Columbia. While challenges like truck access exist, industrial uses should continue to be part of the area. During the Zoning Regulations update, the County should ensure that existing industrial uses are able to continue or expand operations.

Future industrial uses along the Interstate 70 corridor should be supported. However, they should be designed with sensitivity to the surrounding rural context and be able to operate on well and septic systems.



EP-1 Policy Statement



Retain and expand the use of industrial land to support employment opportunities that pay a living wage.

Implementing Actions

1. As part of the Zoning Regulations update, consider protective measures to ensure an adequate long-term supply of industrial land, such as additional requirements or impact statements for rezoning industrial land, zoning that discourages incompatible uses in heavy industrial areas, heavy buffer requirements for non-industrial users locating near heavy industrial land, or industrial overlay zoning for prime industrial land.
2. Determine how compatible uses can co-locate in designated Industrial Mixed-Use character areas to support industrial operations and create an active sense of place.
3. Prioritize for retention industrial land that is uniquely accessible to regional highways for continued industrial use.
4. During the Zoning Regulations update or via Zoning Amendments, favorably consider context-sensitive industrial uses along the Interstate 70 corridor.

EP-2 Policy Statement

Ensure redevelopment is consistent with the character of industrial areas.

Implementing Actions

1. Update the Route 1 Design Manual to include Industrial Mixed-Use character areas and incorporate buffers between redevelopment areas and industrial areas.

— “ —

The Plan needs to anticipate a changing economy and create economic opportunities for new enterprises and a diverse economy.

— “ —

—HoCo-By-Design-process-participant

Growing Emerging and Significant Industries

Howard County has a strong local economy and serves as a regional employer. As shown in Table 5-2, Howard County's major employers represent a diverse set of industries. Strong and significant industries in the County include cybersecurity, information security, information technology, green technology, higher education, research and development, and finance. The nonprofit sector also plays an important role in the County; according to Maryland Nonprofits, Howard County was home to 2,094 nonprofits in 2019 (the largest of which was the Columbia Association). To maximize Howard County's economic competitiveness in the region, economic development should support emerging and significant industries to continue to diversify employment opportunities. By keeping apprised of changing economic trends, Howard County will be able to attract new and diverse industries that support expected job growth. This economic development focus should include the manufacturing, distribution, and logistics industries, which are responding to changes in consumer trends.

The green or environmental industry is another important and emerging employment sector. According to the Bureau of Labor Statistics, green jobs are “jobs in businesses that produce goods or provide services that benefit the environment or conserve natural resources” or “jobs in which workers' duties involve making their establishment's production processes more environmentally friendly or use fewer natural resources.” Investment in the environmental sector accomplishes multiple sustainability goals. The environmental sector tends to endure through economic downturns, bolstering a sustainable economy. This sector traverses multiple industries and creates a significant job pool accessible to a variety of skill sets. By creating opportunities for workers without a college degree, green jobs promote economic mobility and help to close the opportunity gap. Importantly, green jobs also promote environmental sustainability through more efficient energy consumption, reduced greenhouse gas emissions and waste, ecosystem protection, and climate mitigation and adaptation.

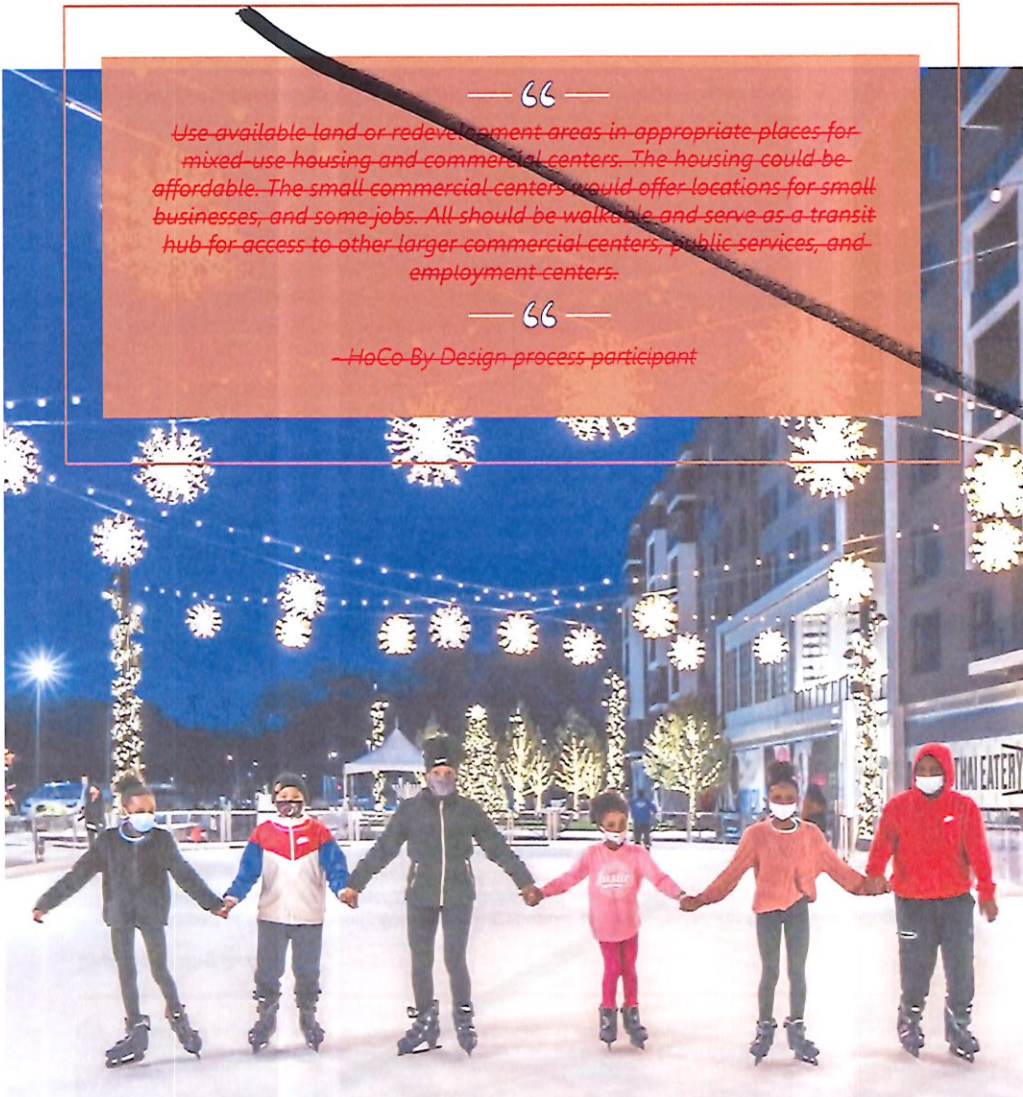
Policies and the Zoning Regulations should support these emerging and significant industries to ensure a healthy and diverse local economy. This support will ensure that the County will be able to meet the future job demand, as indicated in the market study conducted for this General Plan. Deliberate efforts and investments would demonstrate the County is committed to being competitive to attract and grow emerging industry sectors.

EP-3 Policy Statement

Support and diversify the local job market to maximize opportunities to grow regional employment.

Implementing Actions

1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.



— “ —
Use available land or redevelopment areas in appropriate places for mixed-use housing and commercial centers. The housing could be affordable. The small commercial centers would offer locations for small businesses, and some jobs. All should be walkable and serve as a transit hub for access to other larger commercial centers, public services, and employment centers.
— “ —
—HoCo By Design process participant

Promoting a Healthy Jobs/Housing Balance

To remain an attractive community for today's businesses and their employees, Howard County will need to support new and emerging industries and promote a healthy mix of employment and housing opportunities. Such opportunities include replacing the traditional single-use office park of the 1980s and 1990s with offices integrated into mixed-use settings, as many new businesses desire to locate in walkable activity centers that offer diverse housing options and an amenity rich environment for their employees.

HoCo By Design proposes a variety of activity center character areas at different scales. Activity centers allow for infill opportunities to co-locate diverse housing options and jobs in compact, walkable, mixed-use environments. Furthermore, through deliberate placemaking, these centers can become destinations that incorporate useable and inviting open space, transportation connections, pedestrian and bike facilities, and other amenities to attract employers.

To be self-sufficient, these activity centers must support a variety of businesses. As noted earlier in this chapter, it is estimated that the existing capacity of 10.1 million square feet of new non-residential space could accommodate 23,300 jobs, based on estimated jobs-to-building space ratios. This capacity reflects an average of 1,415 new jobs per year, or less than half of the 3,000+ new jobs per year added in Howard County over the last 20 years. The Future Land Use Map (FLUM) contains character areas with land capacity to accommodate approximately 7,800 retail, 23,000 office, and 4,200 industrial jobs (a total of 35,000 jobs and an average of 1,750 new jobs per year over 20 years). Much of this capacity to accommodate job growth is attributed to proposed mixed-use activity centers and industrial/flex centers along the Route 1 Corridor. The capacity for 35,000 jobs would still fall short of the market demand of 59,000 new jobs by 2040, as indicated in the Market Analysis and Demand Forecast prepared for HoCo By Design. However, these additional jobs could be accommodated in Gateway, which HoCo By Design envisions will serve as a regional activity center with a strong focus on innovation, education, research, and technology.

There is a close relationship between employment growth and housing demand, with new jobs fueling a need for nearby homes. Howard County has fewer housing units for each job than nearly every other jurisdiction in the region, with an estimated undersupply of more than 20,000 units. This metric does not account for new housing needed to support the targeted 3,000 new jobs per year the County seeks to maintain over the planning horizon.

As described in the Dynamic Neighborhoods chapter, the majority of the homes built in Howard County today are higher-end single-family homes. Without more housing choices, it will become more difficult to recruit workers that may be priced out of the local market. Failure to meet the County's workforce housing demands will exacerbate the housing affordability challenge and cause more of the County's workforce to live in neighboring counties—resulting in increased traffic congestion and sprawl.

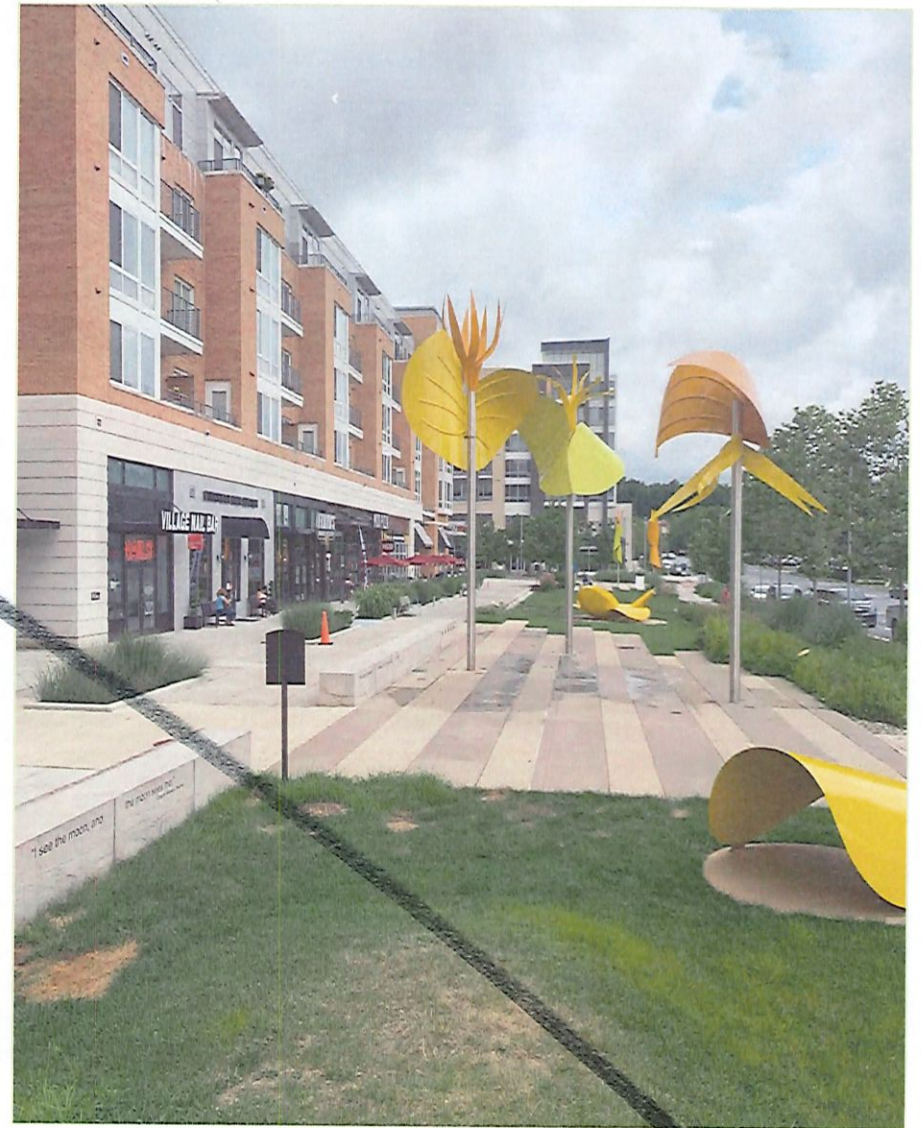
Greater housing diversity increases economic diversity, contributes to wealth expansion, creates new investments, and drives community growth by attracting young professionals, entrepreneurs, and workers with varied educational and professional backgrounds. While housing is primarily provided by the private sector, public policies will help to ensure a healthy balance of housing at different price points located in the right places. Map 5-5 shows the current locations of housing types relative to activity center locations. As activity centers grow, they can serve as locations for both jobs and housing and can provide amenities and job opportunities to the existing communities surrounding them.

EP-4 Policy Statement

Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs housing balance.

Implementing Actions

1. ~~Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.~~
2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.
3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.
6. ~~Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.~~



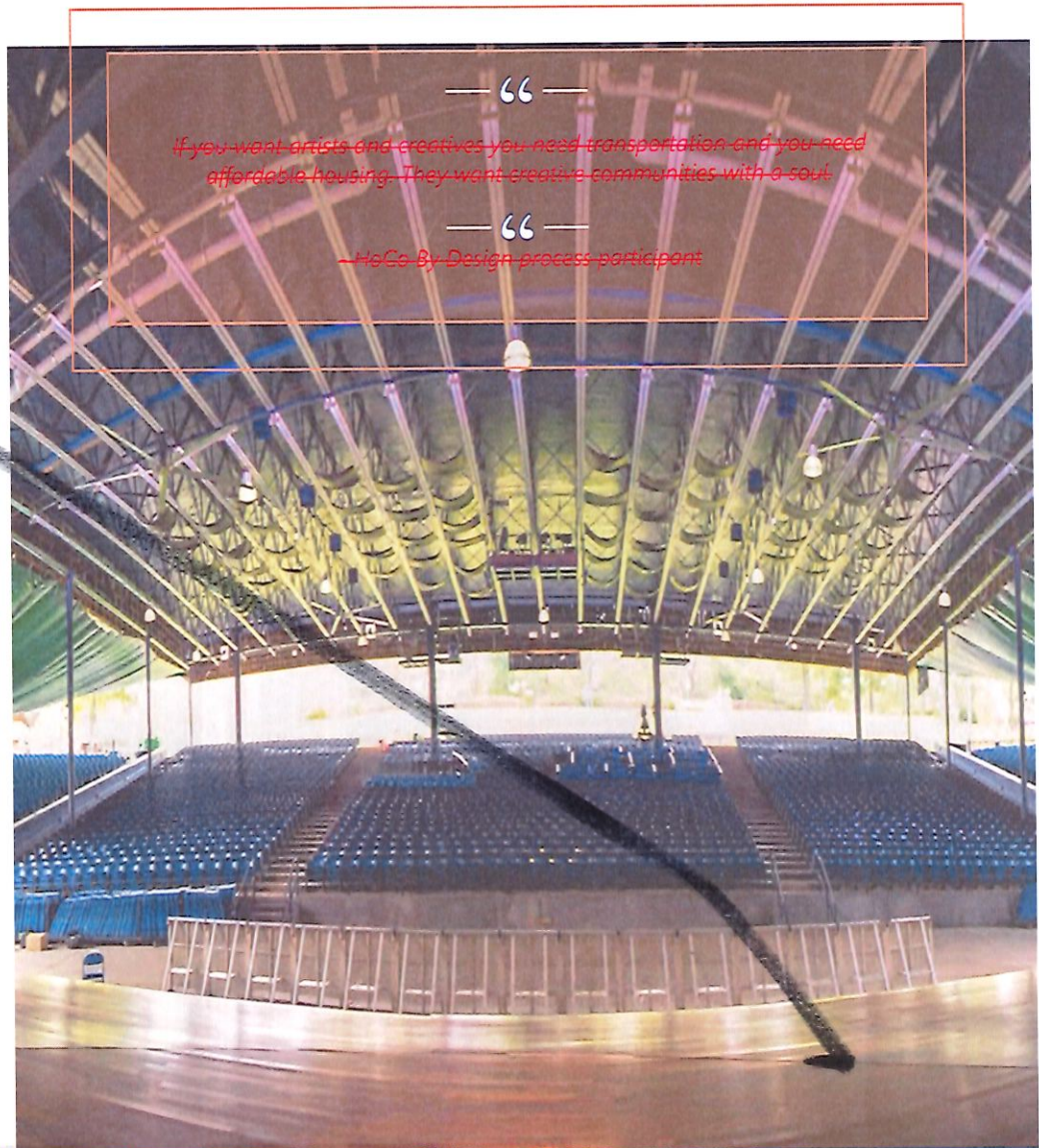
Creating Economic Vibrancy through Arts and Culture

The arts and cultural initiatives are important to many Howard County residents and businesses, enhancing the quality of life and helping to establish a unique sense of place. Such activities also greatly benefit local tourism, offering a destination to those who wish to experience something new and special. Public art instills beauty, character, and a noteworthy signature to particular locations and environments. Incorporating the arts and cultural initiatives into activity centers, main streets, and mixed-use business districts will help to spur further economic activity in these areas of the County.

Artistic and cultural activities, including but not limited to the visual arts, cinema, music, dance, theater and distinctive cultural events, offer opportunities to showcase Howard County's diverse population. The Howard County Arts Council currently advocates and provides for many unique and diverse art experiences in the County. Among the organization's core values is the goal of "cultivating a diverse and inclusive arts culture." The Arts Council operates the multi-purpose Howard County Center for the Arts facility, which provides studio and meeting space and features galleries, classes, and events. The Howard County Tourism Council (Visit Howard County) markets the County as a premier leisure and business travel destination. The Tourism Council collaborates with the County's tourism community "to drive new visitor demand, promotion, product development, and education and advocacy." It will be important to continue to support the Arts Council and Tourism Council, and build upon the work that they do to benefit residents, businesses, and tourists into the future.

At Long Reach Village Center, the arts are an important component of the Long Reach Rising revitalization initiative. The Columbia Art Center has long served as a cultural anchor at the village center and offers gallery space, an artisan shop, and educational programming. The African Art Museum of Maryland, which increases awareness of diverse cultural expression through exhibition of African art, moved to the village center in 2020. Also that year, the Howard County Arts Council began a satellite program to lease studio space to artists at the village center.

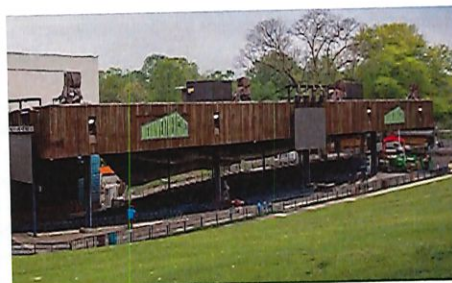
Arts and culture are featured prominently in the Downtown Columbia Plan (DCP), which acknowledges the vital role of public art and cultural activities in shaping the cultural history of Columbia. The DCP envisions a dynamic and continuously increasing role for visual and performing arts and identifies locations throughout downtown for public art. The DCP's adoption codified requirements for art in private downtown development. Merriweather Post Pavilion serves as an existing cultural anchor for Downtown Columbia. This open-air concert venue draws many thousands of concert goers annually, and is surrounded by Symphony Woods and the Chrysalis amphitheater, which provide space for festivals and community events.



A countywide arts and culture center in Downtown Columbia was envisioned by the community over 10 years ago and was ultimately incorporated into the DCP. ~~This vision became reality in 2016 when the New Cultural Center (NCC) was included in the affordable housing plan for Downtown Columbia as one of the public amenities that would also provide mixed-income housing.~~ The NCC is a redevelopment project planned at the current site of Toby's Dinner Theater. The NCC will include a new theater and commercial kitchen, two black box theaters, a gallery, dance studios, various classrooms/performing arts rooms, and mixed-income housing.

The Ellicott City Watershed Master Plan (ECWMP) supports the expansion of arts-related uses and public art in the Main Street area. It recognizes the potential to grow arts and entertainment offerings, build upon existing arts-related events, and give public art a prominent role in the community. Among its policies and implementing actions, the ECWMP recommends that upon expansion of arts-related uses in the area, a Maryland Arts Council, Arts and Entertainment District designation be re-explored. As described in the ECWMP, "Maryland's A&E Districts provide local tax-related incentives to attract artists, arts organizations, and other creative enterprises to towns and cities within the State." Support for additional arts and entertainment uses in Ellicott City may include incentives, reduced rent, or space in county-owned buildings.

In all of these destinations, investments in design value and quality of the public realm create safe and inviting spaces for pedestrians and cyclists, better wayfinding, improved landscaping, enhanced stormwater management, and spaces for civic gatherings, outdoor events, cultural activities, and the arts. The public realm is further described in the Quality By Design chapter.



EP-5 Policy Statement

Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses, and visitors that reflect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.

Implementing Actions



1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, including
3. ~~Re-explore~~ establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.
4. 3. Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.
5. ~~Continue to integrate the arts into revitalization efforts at Long Reach Village Center.~~
6. 4. Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.



Anticipating Future Trends

Economic disruptors and technologies such as autonomous vehicles, teleworking, and e-commerce are likely to lead to demand shifts, requiring future adaptation. New technologies will influence current industries and will likely change land use needs. While in some cases workers will continue to work in office buildings, they may also work in new flex spaces or home offices that are better adapted to the innovation economy. This trend could significantly impact land use demand in Howard County and regionally.

Impact of Covid-19

Despite speculation that Covid-19 and the rise of teleworking would diminish office demand, the need for office space is likely to remain for many businesses and organizations. However, companies are approaching the future of the office differently. Some are shifting to all-remote environments, but most are looking at a hybrid of in-person and remote work in the future. While the internal design of office space may shift to multi-purpose and co-working space, many see the value of a physical office to inspire teambuilding and collaboration. While flagship corporate headquarters may no longer be needed to attract employees, small-scale and regional offices will likely remain in demand. With more employees opting to work remotely, co-working spaces could become an attractive alternative.

Ultimately, as the demand for office space shifts, the location of available space will drive real estate decisions. Places like Columbia are desirable for many office tenants because they feature a central location in a mixed-use environment, walkability, and proximity to retail and other attractions.

E-Commerce and the Future of Retail

E-commerce sales have grown significantly in the last several years, even pre-Covid-19, leading to a rise in physical store closings. Retailers in Howard County will likely choose smaller retail spaces and rely more heavily on "last-mile" inventories stored in local and regional fulfillment centers. When a retailer offers the option to buy online and pick up in-store, the fulfillment center delivers the inventory on-demand from the warehouse to the retail store. The growing need for last-mile distribution to both personal residences and retail stores will likely increase demand for local and regional warehousing.

Industrial land in places along the Route 1 Corridor could provide spaces for last-mile distribution. In the long term, office parks, suburban retail, and other activity centers may be transformed to reflect shifting business models, and large retail stores may become a mix of an in-store and warehouse pick-up.

Emerging theories and trends about the future of the retail sector are changing quickly and sometimes conflict with each other in terms of the magnitude and timing of expected changes. However, most retail market experts agree that customers' desires for experience-based destinations in the future favor the type of new mixed-use activity centers proposed for Howard County on the Future Land Use Map (FLUM). Restaurants, entertainment venues, services, and retail storefronts organized around a network of walkable streets and public spaces will likely be competitive assets in the new retail market.

Improved Business Technologies and Automation

Industries are already seeing a shift in increased levels of artificial intelligence incorporated into their business models. This trend is likely to impact most industries in the long run, with near-term impacts affecting industrial and office users more than others. New and large machinery and automated processes will require roomier and different types of industrial space with less need for a human workforce as jobs are replaced by machines. Improved and efficient construction techniques may give rise to more affordable manufactured and modular housing. Autonomous check-in and online accommodation marketplaces (such as Airbnb and VRBO) will likely continue to change the hospitality industry in the future.

Autonomous Vehicles

Daily commuting is an essential part of life for many Howard County residents and workers. Like the shifts toward telecommuting and innovative workplaces and businesses, autonomous vehicles may alter commuting patterns in the County. Autonomous vehicles, through the deployment of ever-evolving technology, are expected to increase traffic efficiency and reduce travel times. With more efficient commutes, residents could have greater choices in where they wish to live.

Howard County stands to benefit from autonomous vehicles as reduced commute times may attract workers who currently live closer to large employment centers like Baltimore and Washington, DC. The County may experience an uptick in residential demand if autonomous vehicles become more commonplace and if workers therefore grow less apt to want to live in large city centers.

Additionally, if the use of autonomous vehicles (or non-vehicular options including electric bicycles, transit, etc.) grows, the need for large parking lots will decline, increasing the availability of land for new housing and businesses. Reduced parking requirements would decrease development costs and increase the opportunity to meet future housing and job demands.

EP-6 Policy Statement

Monitor economic disruptors, such as new technologies, autonomous vehicles, teleworking, and e-commerce, and employ adaptive and innovative strategies to meet emerging economic shifts.

Implementing Actions

1. Assess and adapt the Zoning Regulations to provide greater flexibility under broader use categories and respond to changing industries and technologies.
2. Continue to intentionally grow jobs in the manufacturing, warehouse, distribution, and logistics industries in response to last-mile distribution demand, new machinery, innovation practices, and other automated processes.
3. Consider reduced parking ratios for commercial uses if the adoption of ~~autonomous vehicles, other new technologies, or~~ shifts in behavior ~~lead leading~~ to reduced parking demand over the Plan's 20-year timeframe.

Expanding Economic OPPortunity through Workforce and Small Business DEVELOPMENT

Access to Education and Jobs

Access to education, training, and skills development is critical to closing the opportunity gap in the workforce. Investing in local talent and human resources keeps residents from commuting elsewhere for jobs, improves their quality of life, reduces greenhouse gas emissions and traffic congestion, and keeps dollars circulating in the local economy. Workforce development initiatives provide investment in human capital and can be particularly helpful to individuals of limited financial means. The Howard County Office of Workforce Development, Howard County Economic Development Authority, Howard Community College, and the nonprofit community are all involved in developing a skilled workforce in the County, through career training, professional certification, and apprenticeship programs. The Howard County Public School System offers high schoolers education in specific industries (such as cybersecurity, computer programming, biotechnology, and many other industries) through its career academies. Vocational and technical training should be made accessible to residents near their neighborhoods and at community centers and facilities served by transit. To ensure underserved populations can participate in training, entities involved in workforce development should partner to offer resources such as child care. Training should also support skills that provide living wages. Well-paying industrial jobs, which require training and certification but less than a four-year college degree, could grow in the future.

The Covid-19 pandemic has spurred increased awareness of the importance of broadband access throughout the County. During the pandemic, high-speed internet access was an essential component of remote learning for children and employment for adults. Those without access were left behind academically and economically. It is important to invest in reliable, affordable broadband in underserved areas.

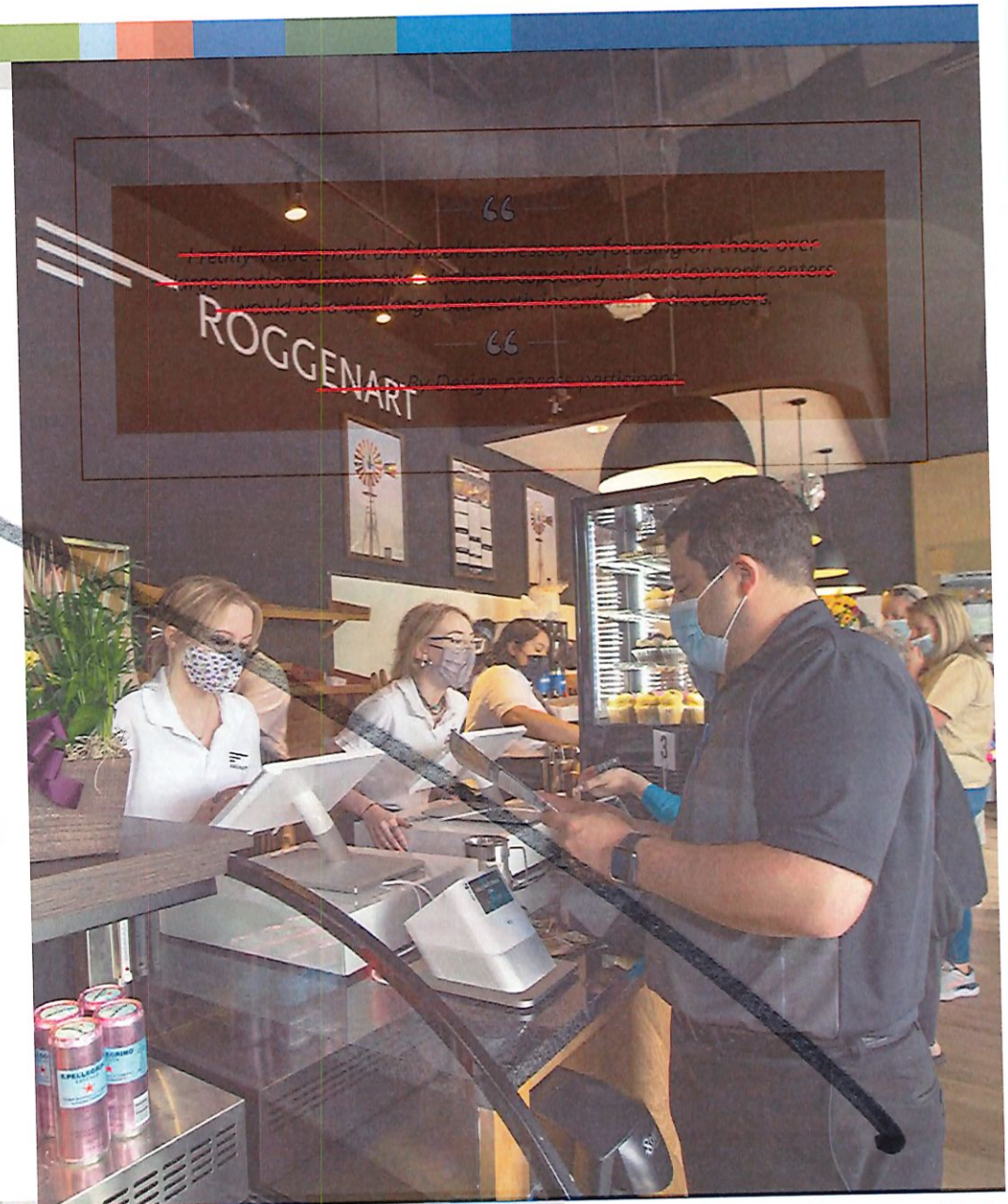
EP-7 Policy Statement



Support an educated and skilled workforce with specific attention and resources devoted to breaking barriers to employment and education while achieving greater racial and social inclusion in the workplace.

Implementing Actions

1. Increase job training, internships, and job placement to overcome barriers to employment and achieve greater racial and social inclusion in the workforce.
2. Partner with organizations that specialize in workforce development to help those experiencing multiple barriers to employment access education, apprenticeship programs, and training opportunities aligned with in-demand local workforce needs.
3. Ensure job training programs support skills that provide living wages.
4. Communicate the available jobs in the region and identify the skills workers need to be successful.
5. Invest in reliable affordable broadband to ensure that lower-income residents have equal access to education and employment opportunities.




Supporting Small, Local, and Minority-Owned Business

Many local businesses provide inviting places to connect with other community members. They are often family-owned and offer fresh, customized approaches that are not found in chains or big-box outlets. However, despite the unique and creative experience these businesses provide, they are traditionally more susceptible to changing economics and redevelopment pressures. Over the past several years, small businesses have faced pandemic disruptions, supply chain problems, and staffing shortages. These recent challenges have left some small businesses struggling to remain afloat, with minority-owned enterprises among the hardest hit.

As technological advances continue to lower the costs of launching new businesses, opportunities for economically-disadvantaged entrepreneurs grow. Ongoing support is critical to assist small local businesses in Howard County as economic changes and redevelopment occur to retain small, culturally diverse businesses that support the local community. Throughout the HoCo By Design public engagement process, small business owners voiced concerns about being priced out of owning a business and noted village centers as ideal locations for small businesses today and a redeveloped Gateway as ideal for the future.

EP-8 Policy Statement

 Encourage a business climate that supports growth of and opportunities for small and diverse businesses, and values cultural diversity and inclusion.

Implementing Actions

1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and Maryland Small Business Development Center.
5. Through adaptive reuse and redevelopment, **particularly within village centers**, provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.

— ❧ —
There is a lack of local business growth, and especially businesses owned by people of color. Ownership needs to be within reach and other financial supports to get started as it's currently cost prohibitive.

— ❧ —
- HoCo By Design process participant



Sustaining our Agricultural Economy

Agriculture is an important economic driver in Maryland that contributes to Howard County's thriving economy. According to the 2017 US Department of Agriculture (USDA) Census of Agriculture, farming in the County directly contributes approximately \$27.3 million annually, with an overall economic impact of \$43.7 million. The key contributors to the agricultural economy are horticulture, crop production, livestock production, equine operations, direct to consumer enterprises, and agritourism.

Agriculture in the County faces significant challenges. The availability of affordable farmland, particularly for the next generation of potential farmers, labor shortages, impediments to accessing agricultural infrastructure, and the high cost of insurance threaten the long-term viability of farming. Input costs continue to rise, and profit margins remain slim, which is a reality for agricultural producers nationally and locally. Climate change adds a layer of uncertainty to these challenges. Additionally, conflicts with residential neighbors over on-farm uses restrain farmers' ability to experiment with potentially higher-income operations that draw large numbers of people to the farm.

On the other hand, Howard County offers unique opportunities for farms to diversify their sales channels. County farms are close to residential neighbors who have a growing desire for locally-sourced food and an interest in visiting nearby farms for product, entertainment, and agricultural education. Howard County Government hosts an agricultural subcommittee representing several agencies that, together, buttress the industry through technical and financial assistance and farm-friendly policies and regulations.

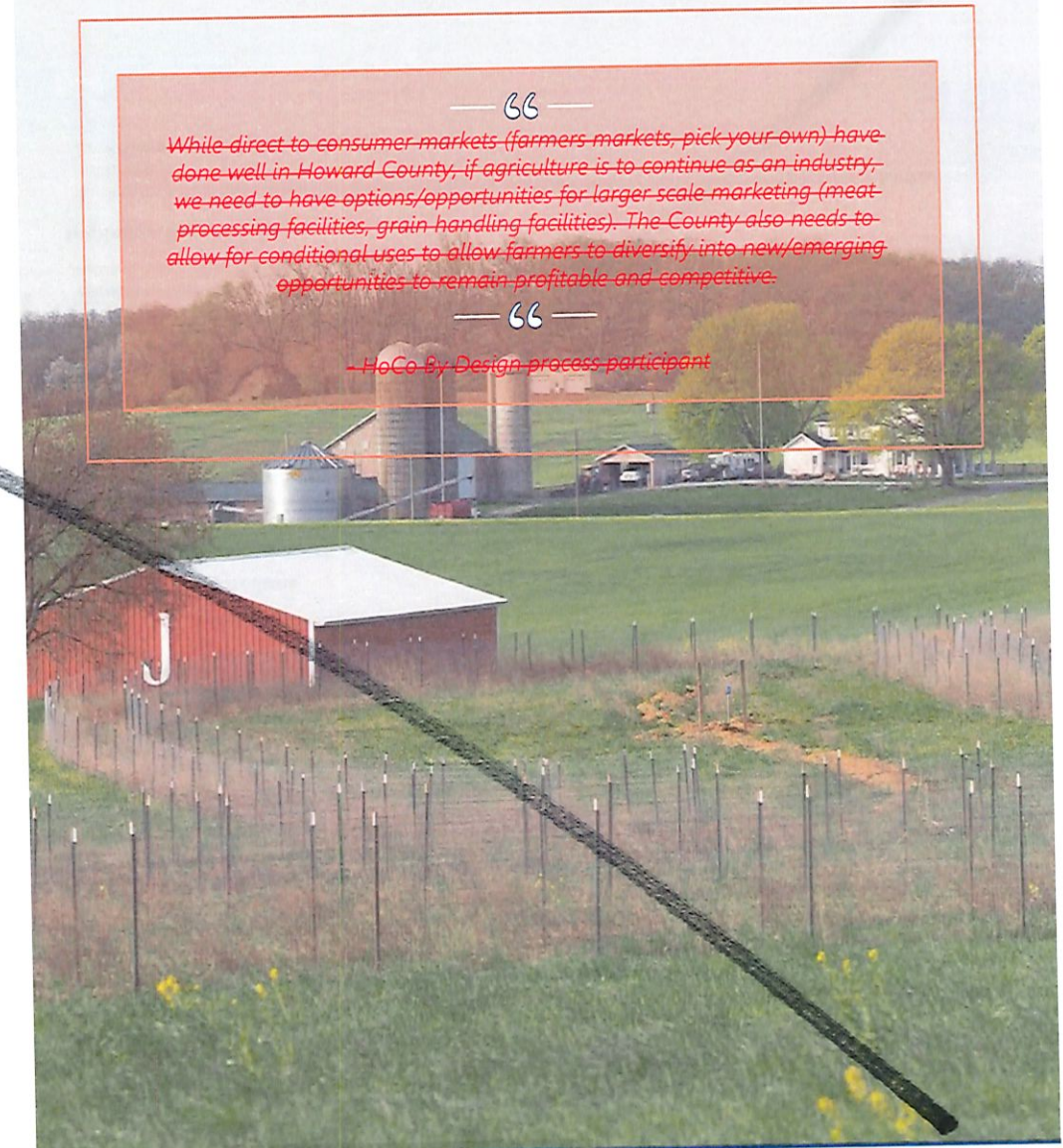
As agriculture continues to evolve, the farming community will need flexible and prompt support to prosper and remain competitive. Howard County farmers have been on the forefront of innovation and diversification for years, due to both the challenges and opportunities they face. County policies and regulations should continue to keep pace with changes to farming in the future.

Current Status and Trends

Much of the data that informs the policies and implementing actions for the agricultural industry is derived from the USDA Census of Agriculture, which is conducted every five years and was last completed in 2017. The Census is based on self-reporting and is the most comprehensive source of information regarding agriculture in the County. A detailed analysis of the data provided by the last several USDA Censuses is provided in the Agriculture Assessment prepared for HoCo By Design.

Farmland

In 2017, 321 farms responded to the USDA Census of Agriculture in Howard County. Together, they accounted for 32,436 acres of farmland. USDA's definition of a farm is any place from which \$1,000 or more of agricultural products will be sold or normally are sold within any given year. Compared with Census figures over the previous 15 years, the general trend shows a gradual rate of decline in farm numbers and farm acreage.



“
While direct to consumer markets (farmers markets, pick your own) have done well in Howard County, if agriculture is to continue as an industry, we need to have options/opportunities for larger scale marketing (meat processing facilities, grain handling facilities). The County also needs to allow for conditional uses to allow farmers to diversify into new/emerging opportunities to remain profitable and competitive.
”

— HoCo By Design process participant

EP-9 Policy Statement

Promote and support modern farming initiatives that reflect the changing needs and economic drivers of agriculture in Howard County.

Implementing Actions

1. Support development of appropriately equipped and licensed commercial processing and kitchen facilities that can accommodate various agricultural and food processing needs for farmers and entrepreneurs.
2. Continue and expand business development services that can position agricultural enterprises for growth, innovation, and diversification.
3. Improve opportunities for the growth of e-commerce and last-mile delivery infrastructure, including integration of technological advances in customer delivery.
4. Encourage and enhance agricultural opportunities in the eastern portion of the County.
5. Enhance and expand the partnership between the Agricultural Land Preservation Program, the Howard County Economic Development Authority, the University of Maryland, and the farming community to assist farmers as agriculture continues to evolve and diversify.
6. Consider consolidating offices, services, and educational resources for the farming community in a single location.

EP-10 Policy Statement

Continue and enhance established technical and funding efforts to support the farming community.

Implementing Actions

1. Continue funding for the Howard Soil Conservation District to assist farmers with design and installation of best management practices (BMPs).
2. Consider expanding County assistance to fill gaps in cost share programs for agricultural BMPs.
3. Continue the Howard County Economic Development Authority's Agricultural Marketing Program, including its Agricultural Innovation Grants, business planning, and other financial and technical assistance.
4. Expand the Agricultural Innovation Grants by allocating additional resources and creating opportunities for urban agriculture endeavors in the East.

EP-11 Policy Statement



Support and encourage beginning farmers to build a diverse farming community.

Implementing Actions

1. Support the development of new and continue ongoing agricultural education initiatives that encourage students from a variety of backgrounds to consider agriculture as a career choice.
2. Consider establishing a financing program to help farmers purchase farmland.
3. Establish a grant program for beginning farmers.
4. Consider leasing county-owned land for start-up agricultural businesses.
5. Consider creating a program to loan or share farm equipment.
6. Enhance availability and access to community gardens *that can be used by beginning farmers.*

EP-12 Policy Statement

Reduce regulatory barriers to diversified agricultural operations in both the Rural West and the East.

Implementing Actions

1. Update the Zoning Regulations and other policies to promote agricultural expansion and diversification, especially for on-farm processing and other agribusiness opportunities.
2. Work with agricultural and community stakeholders to review and update the Zoning Regulations and other regulations to create more opportunities for agritourism.
3. Reduce barriers to the burgeoning demand for on-farm breweries, wineries, cideries, meaderies, and distilleries.

EP-13 Policy Statement

Review transportation planning and road development and maintenance standards to reduce transportation barriers to farming.

Implementing Actions

1. Improve rural road conditions by increasing overhead tree clearance and addressing passage at narrow bridges.
2. Reduce conflict between recreational, residential, commercial, and agricultural road uses.

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-3 - Support and diversify the local job market to maximize opportunities to grow regional employment.		
1. Develop tools and strategies to support long-term job diversity initiatives, emerging industries, and job opportunities accessible to a variety of skill and educational levels.	HCEDA	Mid-Term
2. Promote green industries by creating incentives to attract new businesses demonstrating sustainable practices or developing sustainable technologies, materials, and products.	HCEDA	Mid-Term
3. Support new investment and job creation in emerging markets, especially those that reveal new opportunities for renewable energy and green technologies, including but not limited to solar arrays and canopies.	HCEDA	Long-Term

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-4 - Create job opportunities through new mixed-use activity centers that serve as destinations and include a mix of uses that compliment and support one another and improve the jobs-housing balance.		
1. Revise the Zoning Regulations, Subdivision and Land Development Regulations, and other land use regulations and guidelines to ensure that mixed-use activity centers incorporate an array of housing types (possibly including goals for a specific percentage mix of housing types), walkable neighborhoods, open space, and compatible transitions between neighboring uses.	DPZ	Mid-Term
2. 1. Allow sufficient densities redevelopment in activity centers through the Zoning Regulations to make a wide range of uses economically viable. Encourage densities sufficient to support Require village center redevelopment to provide convenience retail and other local-serving amenities at the neighborhood level.	DPZ	Mid-Term
3. 2. Plan for future transportation connections, including bicycle, pedestrian, and transit, among and between activity centers and other commercial centers.	DPZ OOT	Ongoing
4. 3. Ensure that growth management tools consider the need for housing growth that keeps pace with employment growth in addition to infrastructure demands.	DPZ	Ongoing
5. 4. Develop a master plan for Gateway that describes the area's desired future mix of uses, open space network, development phasing and intensity, building height range, and infrastructure approach. Build upon the general considerations included in the HoCo By Design Focus Areas technical appendix.	DPZ	Mid-Term
6. Create opportunities to house the County's essential workers, including teachers, healthcare workers, and public safety personnel.	DHCD DPZ Non-profit sector Private Partners	Ongoing

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+)
EP-5 - Seek opportunities to encourage and support the arts and cultural initiatives for residents, businesses and visitors that respect and celebrate Howard County's diverse population and are safe and accessible to people of all abilities.		
1. Encourage inclusive opportunities for the arts, cultural expression, and entertainment in new and existing activity centers through integration of public art, cultural amenities, public gathering space, and an activated public realm.	DPZ Private Partners	Ongoing
2. Explore incentives to support the expansion of arts and entertainment uses in Ellicott City, <u>including establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.</u>	DPW	Mid-Term
3. Re-explore establishing an Arts and Entertainment (A&E) District Designation for Main Street Ellicott City as part of a creative places initiative, once additional arts and entertainment uses open.	DPZ DPW	Long-Term
4. 3. Ensure that the Downtown Columbia Plan's vision for the arts continues to be implemented.	DPZ DRP DPW	Ongoing
5. Continue to integrate the arts into revitalization efforts at Long Reach Village Center.	DPW DPZ	Ongoing
6. 4. Continue to support the goals of the Howard County Arts Council and Howard County Tourism Council to benefit residents, businesses, and tourists into the future.	Elected Officials OOB	Ongoing
EP-6 - Monitor economic disruptors, such as new technologies, autonomous vehicles, teleworking, and e-commerce, and employ adaptive and innovative strategies to meet emerging economic shifts.		
1. Assess and adapt the Zoning Regulations to provide greater flexibility under broader use categories and respond to changing industries and technologies.	DPZ HCEDA OOT	Mid-Term
2. Continue to intentionally grow jobs in the manufacturing, warehouse, distribution, and logistics industries in response to last-mile distribution demand, new machinery, innovation practices, and other automated processes.	HCEDA	Long-Term
3. Consider reduced parking ratios for commercial uses if the adoption of autonomous vehicles, other new technologies, or shifts in behavior lead leading to reduced parking demand over the Plan's 20-year timeframe.	DPZ OOT	Mid-Term

Table 10-1: Implementation Matrix

Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-7 - Support an educated and skilled workforce with specific attention and resources devoted to breaking barriers to employment and education while achieving greater racial and social inclusion in the workplace.		
1. Increase job training, internships, and job placement to overcome barriers to employment and achieve greater racial and social inclusion in the workforce.	HCEDA OWD	Mid-Term
2. Partner with organizations that specialize in workforce development to help those experiencing multiple barriers to employment access education, apprenticeship programs, and training opportunities aligned with in-demand local workforce needs.	HCEDA OWD	Long-Term
3. Ensure job training programs support skills that provide living wages.	HCEDA OWD	Ongoing
4. Communicate the available jobs in the region and identify the skills workers need to be successful.	HCEDA OWD	Mid-Term
5. Invest in reliable affordable broadband to ensure that lower-income residents have equal access to education and employment opportunities.	DTCS Private Partners	Mid-Term
EP-8 - Encourage a business climate that supports growth of and opportunities for small and diverse businesses, and values cultural diversity and inclusion.		
1. Continue to create strategies and prioritize assistance programs to support local, small, and diverse businesses, such as apprenticeship programs.	HCEDA	Ongoing
2. Support small business districts and main streets by creating vibrant spaces through the integration of design, public art, an inviting public realm, historic preservation, cultural spaces, and areas for event programming.	DPZ DRP DPW	Ongoing
3. Explore and encourage creative uses of commercial space, such as maker spaces, coworking facilities, food halls, community kitchens, and other models, that allow the community to share resources.	HCEDA DPW DPZ	Ongoing
4. Continue business support programs through a partnership between the Howard County Economic Development Authority, Ellicott City Partnership, and the Maryland Small Business Development Center.	HCEDA	Ongoing
5. Through adaptive reuse and redevelopment, particularly within village centers , provide opportunities for varying sizes of retail, restaurant, and service uses. Smaller spaces could provide opportunities for small start-ups, micro-retail, and food hall type uses.	DPZ HCEDA DRP	Ongoing

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-9 - Promote and support modern farming initiatives that reflect the changing needs and economic drivers of agriculture in Howard County.		
1. Support development of appropriately equipped and licensed commercial processing and kitchen facilities that can accommodate various agricultural and food processing needs for farmers and entrepreneurs.	OCS HCEDA	Mid-Term
2. Continue and expand business development services that can position agricultural enterprises for growth, innovation, and diversification.	HCEDA OCS	Ongoing
3. Improve opportunities for the growth of e-commerce and last-mile delivery infrastructure, including integration of technological advances in customer delivery.	HCEDA OCS OOT	Long-term
4. Encourage and enhance agricultural opportunities in the eastern portion of the County.	OCS HCEDA DPZ	Mid-Term
5. Enhance and expand the partnership between the Agricultural Land Preservation Program, the Howard County Economic Development Authority, the University of Maryland, and the farming community to assist farmers as agriculture continues to evolve and diversify.	HCEDA OCS DPZ Private Partners	Ongoing
6. Consider consolidating offices, services, and educational resources for the farming community in a single location.	OCS HCEDA	Long-Term

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
EP-10 - Continue and enhance established technical and funding efforts to support the farming community.		
1. Continue funding for the Howard Soil Conservation District to assist farmers with design and installation of best management practices (BMPs).	DPZ DPW OCS Elected Officials OOB	Ongoing
2. Consider expanding County assistance to fill gaps in cost share programs for agricultural BMPs.	HCEDA OCS	Mid-Term
3. Continue the Howard County Economic Development Authority's Agricultural Marketing Program, including its Agricultural Innovation Grants, business planning, and other financial and technical assistance.	HCEDA DPZ	Ongoing
4. Expand the Agricultural Innovation Grants by allocating additional resources and creating opportunities for urban agriculture endeavors in the East.	HCEDA DPZ OCS	Long-term
EP-11 - Support and encourage beginning farmers to build a diverse farming community.		
1. Support the development of new and continue ongoing agricultural education initiatives that encourage students from a variety of backgrounds to consider agriculture as a career choice.	HCEDA	Mid-Term
2. Consider establishing a financing program to help farmers purchase farmland.	HCEDA	Mid-Term
3. Establish a grant program for beginning farmers.	HCEDA OCS	Mid-Term
4. Consider leasing county-owned land for start-up agricultural businesses.	DPW HCEDA DPZ DRP	Mid-Term
5. Consider creating a program to loan or share farm equipment.	HCEDA	Mid-Term
6. Enhance availability and access to community gardens that can be used by beginning farmers.	DRP OCS DPZ	Mid-Term

Amendment 75 to Council Bill No. 28 -2023

BY: Deb Jung

Legislative Day 11

Date: 10/02/2023

Amendment No. 75

(This Amendment makes the following changes to HoCo by Design Chapters 6 and 11:

- Chapter 6: Dynamic Neighborhoods*
- *Amends Implementation Action 4c to clarify that incentives related to development are outside of New Town zoning.*
 - *Amends Implementing Action 4d. in the DN-5 Policy Statement by deleting the following language: “, exemptions from school requirements in the Adequate Public Facilities Ordinance,”; and*
- Chapter 11: Implementation*
- *Amends Implementation Action 4c to clarify that incentives related to development are outside of New Town zoning.*
 - *Amends Implementing Policy and Implementing Action 4d. in the DN-5 Policy Statement in Table 10-1: Implementation Matrix by deleting the following language: “, exemptions from school requirements in the Adequate Public Facilities Ordinance,”).*

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 6: Dynamic Neighborhoods, page 51; and
4 • Chapter 11: Implementation, page 39.

5
6 Correct all page numbers, numbering, and formatting within this Act to accommodate this
7 amendment.

8

I certify this is a true copy of

Am 75 CB 28

passed on

10/11/2023

Failed

Michelle Jung
Council Administrator

DN-5 Policy Statement



Increase the supply of for-sale and rental housing units in all new developments attainable to low- and moderate-income households and special needs households.

Implementing Actions

1. Reevaluate the County's inclusionary zoning policies to ensure they are meeting their intended objectives. Expand Moderate Income Housing Unit (MIHU) requirements in areas with a disproportionately lower share of housing options affordable to low- or moderate-income households.
2. Ensure that any corridor, neighborhood, redevelopment, or area plan includes clear policies for meeting affordable housing goals.
3. Update MIHU rules and fee structures, with the goal of producing more units throughout the County that are integrated within communities. Seek opportunities to amend the Zoning Regulations to enable housing types more conducive to on-site MIHU provision across a broader area.
4. Establish a working group to evaluate the feasibility of a targeted incentive program for affordable and accessible housing, including:
 - a. The creation of a definition of affordable and accessible housing, including physical factors such as unit type, size, or physical accessibility design criteria; and/or income factors through tools such as deed restrictions.
 - b. A zoning overlay targeting locations for affordable and accessible housing where there is limited existing supply of affordable and accessible units.
 - c. Incentives related to development, such as density bonuses or relief to setback or other development standards outside of New Town zoning.
 - d. Incentives related to the development process, such as the creation of a specific housing allocation pool for affordable and/or accessible units ~~, exemptions from school requirements in the Adequate Public Facilities Ordinance,~~ or other means of reducing ~~other~~ regulatory barriers.

DN-6 Policy Statement



Provide various incentives that encourage the development of for-sale and rental housing units affordable to low- and moderate-income households and special needs households.

Implementing Actions

1. Continue to support the Housing Opportunities Trust Fund to expand the number of income-restricted rental and homeownership units produced. Explore the feasibility of establishing a dedicated funding source for this fund.
2. Evaluate opportunities to co-locate income-restricted housing and community facilities on county-owned land.
3. Establish criteria for flexible use and disposition of county real estate assets that are near amenities and would promote development of affordable missing middle and multi-family housing for low- and moderate-income households where appropriate.
4. Offer additional incentives to encourage the production of more Moderate Income Housing Units than required, and/or deeper levels of income targeting in the form of Low Income Housing Units or Disability Income Housing Units.
5. Continue to provide and increase downpayment assistance funding to income-eligible households through the County's Settlement Downpayment Loan Program.

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
DN-5 - Increase the supply of for-sale and rental housing units in all new developments attainable to low- and moderate-income households and special needs households.		
1. Reevaluate the County's inclusionary zoning policies to ensure they are meeting their intended objectives. Expand Moderate Income Housing Unit (MIHU) requirements in areas with a disproportionately lower share of housing options affordable to low- or moderate-income households.	DHCD DPZ	Mid-Term
2. Ensure that any corridor, neighborhood, redevelopment, or area plan includes clear policies for meeting affordable housing goals.	DPZ DHCD	Long-term
3. Update MIHU rules and fee structures, with the goal of producing more units throughout the County that are integrated within communities. Seek opportunities to amend the Zoning Regulations to enable housing types more conducive to on-site MIHU provision across a broader area.	DHCD DPZ	Long-term
4. Establish a working group to evaluate the feasibility of a targeted incentive program for affordable and accessible housing, including: <ul style="list-style-type: none"> a. The creation of a definition of affordable and accessible housing, including physical factors such as unit type, size, or physical accessibility design criteria; and/or income factors through tools such as deed restrictions. b. A zoning overlay targeting locations for affordable and accessible housing where there is limited existing supply of affordable and accessible units. c. Incentives related to development, such as density bonuses or relief to setback or other development standards <u>outside of New Town zoning.</u> d. Incentives related to the development process, such as the creation of a specific housing allocation pool for affordable and/or accessible units, exemptions from school requirements in the Adequate Public Facilities Ordinance; or other means of reducing other regulatory barriers. 	DPZ DHCD Non-profit Partners	Mid-Term

Table 10-1: Implementation Matrix		
Policy and Implementing Actions	Lead Agency	Timeframe (Mid-Term five-year, Long-Term six+ years, Ongoing)
DN-6 - Provide various incentives that encourage the development of for-sale and rental housing units affordable to low- and moderate-income households and special needs households.		
1. Continue to support the Housing Opportunities Trust Fund to expand the number of income-restricted rental and homeownership units produced. Explore the feasibility of establishing a dedicated funding source for this fund.	DHCD Elected Officials OOB	Ongoing
2. Evaluate opportunities to co-locate income-restricted housing and community facilities on county-owned land.	DPW DPZ DHCD	Long-term
3. Establish criteria for flexible use and disposition of county real estate assets that are near amenities and would promote development of affordable missing middle and multi-family housing for low- and moderate-income households where appropriate.	DHCD HCHC DPW	Mid-Term
4. Offer additional incentives to encourage the production of more Moderate Income Housing Units than required, and/or deeper levels of income targeting in the form of Low Income Housing Units or Disability Income Housing Units.	DHCD DPZ Non-profit Partners	Ongoing
5. Continue to provide and increase downpayment assistance funding to income-eligible households through the County's Settlement Downpayment Loan Program.	DHCD	Ongoing