

## **APPENDICES**

***A: Property Profiles***

***B: Howard County Public School System Letter***

***C: Demographic Data***

***D: Retail Supply Inventory***

***E: Major Village Center Redevelopment Process  
Flowchart***

## **APPENDIX A**

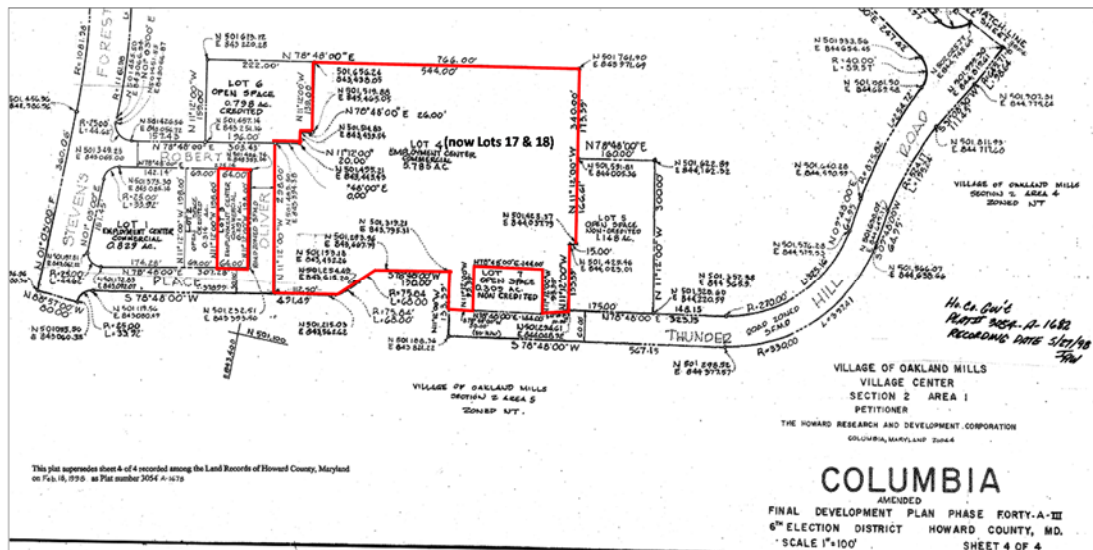
### ***Property Profiles***

The following information on Oakland Mills Village Center profiled properties was compiled from a combination of public records, direct and often multiple discussions with property owners, property inspections and other observations. While the consultant attempted to contact all property owners on multiple occasions, and the majority provided substantial input and feedback, the level of response was not universal. In the attached profiles, additional comments beyond that available through public sources is limited to those owners with which there was direct supplemental engagement.

## 1. Oakland Mills Shopping Center

- Address – 5865 Robert Oliver Place
- Ownership – Cedar Realty Trust, a publicly traded real estate investment trust focused on owning and managing supermarket anchored shopping centers, primarily located between Virginia and Massachusetts. The company is headquartered in Port Washington, New York.
- Three lots totaling 6.071 acres improved with 58,224 sf (0.22 FAR): (see FDP 40-A-3-below)
  - Lot 3 – vacant bank building (2,300 sf built in 1998) on 0.291 acres (0.18 FAR)
  - Lot 17 (previously part of Lot 4)– grocery store (43,470 sf built in 1969/1998) on 1.43 acres (0.70 FAR)
  - Lot 18 (previously part of Lot 4) – in-line retail (12,454 sf built in 1969) on 4.35 acres (0.07 FAR)

### Oakland Mills Shopping Center FDP 40-A-3



- Parking – Capacity totals 311 spaces, of which 80+ spaces (26%) are located at the back of the center. This equates to a parking ratio of 5.3 spaces per 1,000 square feet. Some of these parking spaces are used by visitors to Columbia Association’s Ice Rink, Barn and Other Barn, and have been partially used from time-to-time for bus commuter parking. The available parking appears adequate for the existing retail businesses from anecdotal consultant observation and reports from building occupants.
- Occupancy – 100 percent leased; 87.5 percent occupied by 7 tenants (Columbia Bank with 2,300 sf and approximately 5,216 sf of the grocery anchor space are leased but unoccupied / vacant).
- Retail Space Components – The space breakdown is 66% grocery (Weis Markets) and 30% for six in-line retail tenants and 4% for the bank pad.
- Retail Mix – Comprises restaurant tenants totaling 7,040 sf (Second Chance, Lucky China, Vennari’s Pizza), two personal care users comprising 3,050 sf (Oakland Mills Cleaners, A Shade Above), and one 2,364 sf retail store (Oakland Mills Liquors).

- Access – There are three primary points of access (two off Stevens Forest Road on Robert Oliver Place and one off the intersection of Thunder Hill Road / Santiago Road).
- Lease Terms – Grocery anchor lease term reported to be through 2018, with multiple option periods extending another 20 years (per Cedar Realty 2005 press release). Lease terms for other Cedar Realty tenants are assumed to be of shorter duration, with varied provision.

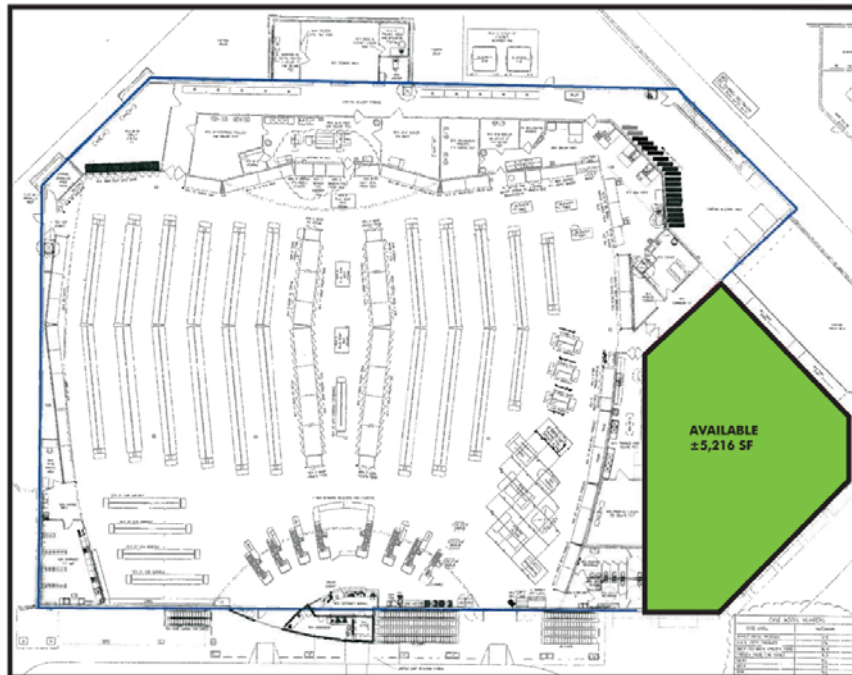


Source: Cedar Realty and Bolan Smart, 2016

#	Tenant	SF	% of Total
1	Weis Markets	38,254	66%
1a	Former Grocery Space / Vacant	5,216	9%
	<i>Subtotal Anchor:</i>	<i>43,470</i>	
2	Oakland Mills Cleaners	2,000	
3	Lucky China Inn	1,700	
4	Vennari's Pizza	1,096	
5	A Shade Above	1,050	
6	Oakland Mills Liquors	2,364	
7	Second Chance Saloon	4,244	
	<i>Subtotal In-Line:</i>	<i>12,454</i>	<i>21%</i>
8	Former Columbia Bank Space	2,300	
	<i>Subtotal In-Pad Site:</i>	<i>2,300</i>	<i>4%</i>
	<b>Total SF:</b>	<b>58,224</b>	<b>100%</b>

Source: Cedar Realty and Bolan Smart, 10/2016

### Weis Markets Leased Space



Source: CBRE, 2017

- Purchase Price – Property was reportedly purchased from Kimco in 2005 for \$8.0 million (\$137psf) (per Oakland Mills Changing Hands July 27, 2005 Baltimore Sun article and a 2005 Cedar Realty press release).
- 2016 Tax Assessments – Though not a measure of market value, the State of Maryland real estate assessment records assess the property at approximately \$7.1 million as of 2016, of which approximately 30% is allocated to land value:

Lot #	Land		Building		Total
	\$	% of Total	\$	% of Total	
3	\$188,204	32%	\$400,663	68%	\$588,867
17	\$464,468	10%	\$4,000,532	90%	\$4,465,000
18	<u>\$1,374,310</u>	<u>68%</u>	<u>\$639,623</u>	<u>32%</u>	<u>\$2,013,933</u>
<b>Total:</b>	<b>\$2,026,982</b>	<b>29%</b>	<b>\$5,040,818</b>	<b>71%</b>	<b>\$7,067,800</b>

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP 40-A-3 – Property has New Town zoning and is subject to the specific FDP requirements. Current land use restrictions are based on the 1968/69 Final Development Plan Phase (FDP) 40-3 permitting a range of commercial uses defined in B-1, B-2 and SC zoning districts.
- Deed Restrictions – There are no specific deed restrictions, however, any changes to the village center requires the Oakland Mills Community Association architectural committee approval (per the Oakland Mills Village Covenants; Deed, Agreement and Declarations dated November 7, 1968).

### **Possible Real Estate Development Scenarios?**

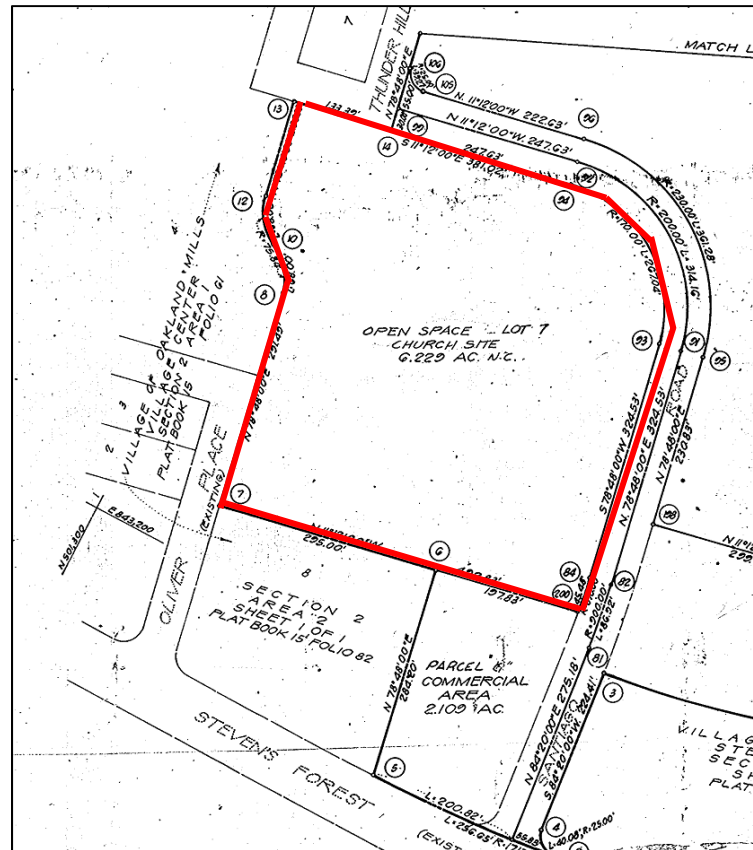
Status Quo: Ownership focus on leasing the vacant space (Cedar marketing the vacant bank pad and Weis Markets trying to sublease their 5,200 sf).

Enhanced Development Opportunities: Possible future investment scenarios in conjunction with overall Village Center redevelopment efforts.

## 2. Oakland Mills Interfaith Center (OMIC)

- Address – 5885 Robert Oliver Place
- Ownership – The building is referred to as the Meeting House and is home to five autonomous religious congregations that jointly own and operate the facility.
- Lot 7 – 33,000+ sf (built in 1978) on 6.22 acres equating to a 0.13 FAR

### Oakland Mills Interfaith Center FDP 80-A-2



- Use – The multi-functional space includes conference and meeting rooms, preschool classrooms (Nurturing Nest Montessori School, preschool through kindergarten, has 7,460 square feet since 2009) and offices. .
- Occupancy – 100% occupied (73% owner use, 23% leased preschool operator). OMIC estimated annual visits of 100,000+ persons, averaging on the order of 2,000 per week.
- Parking – There are a total of 228 owned spaces and access to a total of 272 spaces (not counting other non-dedicated nearby parking supporting adjacent land uses). There are 192 main lot parking space, 36 owned but dedicated shared spaces with the Stevens Forest Professional Center, and 44 additional shared spaces owned by the Stevens Forest Professional Center.
- Access – There are two primary points of access (off Santiago Road and Robert Oliver Place / OMVC parking), and one secondary access (shared with offices).

- Open Space – Approximately 45% of the lot is open space (net of building area, parking and access points).
- 2016 Tax Assessments – Though not a measure of market value, the State of Maryland real estate assessment records assess the property at approximately \$3.9M broken down as follows:

Lot	Land		Building		Total
	\$	% of Total	\$	% of Total	
7	\$1,991,336	51%	\$1,949,197	49%	\$3,940,533

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP 80-A-2 / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. Current land use restrictions per the 1968 FDP are limited to all open space land uses, including, but not limited to the operation of religious facilities and all related uses. Any change in land use would need to be updated with approval from Howard Hughes and Howard County.

### Possible Real Estate Development Scenarios?

Status Quo: Possible property boundary and access tweaks with any road network adjustments proposed by adjoining property owners, including equitable compensation for any land contributions; case-by-case consideration of any future development proposals.

Enhanced Development Opportunities: Possible OMIC collaboration in overall Village Center redevelopment.

*OMIC Ongoing Needs:* Preserving 15,000 square feet of land area adjacent to the Meeting House for potential future OMIC expansion, retaining the existing loading dock area, outdoor play area for outleased school use, and 225 dedicated parking spaces (approximately 80% of current 272 spaces), rendering 52 owned spaces (approximately 20,000 sf) as possibly available for alternative land use. Points of property access could be reduced without losing a prominent “front door”. Space available for outdoor gatherings is important, though could be concentrated into a planned area and shared with other users (assumed to require a minimum of 10,000 to 20,000 sf.). Open to expanded concepts of shared parking for premium parking capacity periods (3-4 times a year).

*Possible Alternative Land Use and Development:* Road realignments and access points that preserve OMIC needs. New site development for uses ranging from OMIC mission related to arm’s length market based disposition, implemented through a variety of compensation options and cooperative agreements. Could consider limited shared building walls / some reconfiguring of the Meeting House with new uses. Assuming standalone Meeting House, a majority of the building perimeter would require a 50+ foot setback buffer. Multiple story adjacent structures of up to four or five stories may be okay. Garage parking for OMIC needs is conceivable, shared or otherwise, though recognizing that cost of building parking structures may reduce land value proceeds.

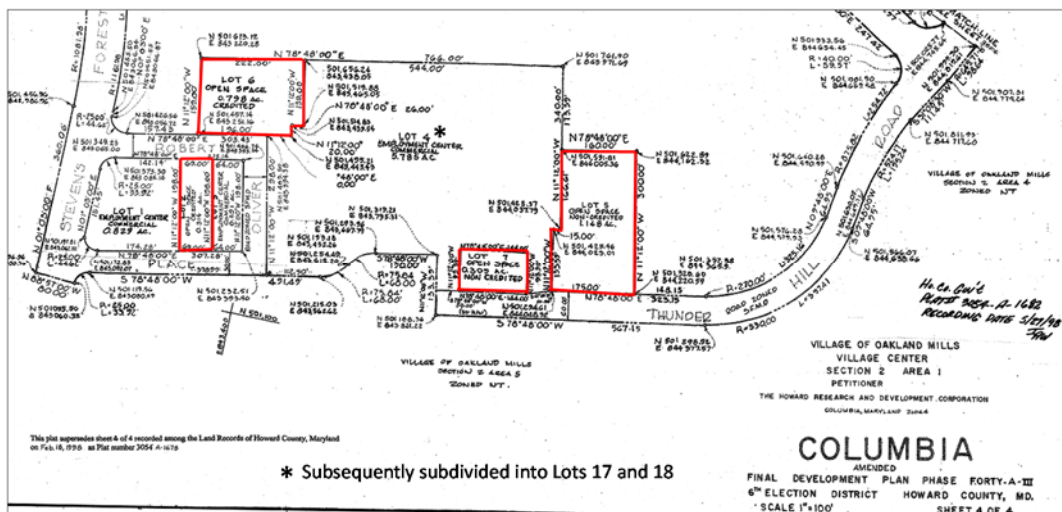
*Community Programs:* Village Center redevelopment efforts may also be aided by exploring additional opportunities for OMIC community service initiatives.



### 3. The Barns / Parking / Rink and Tennis Courts

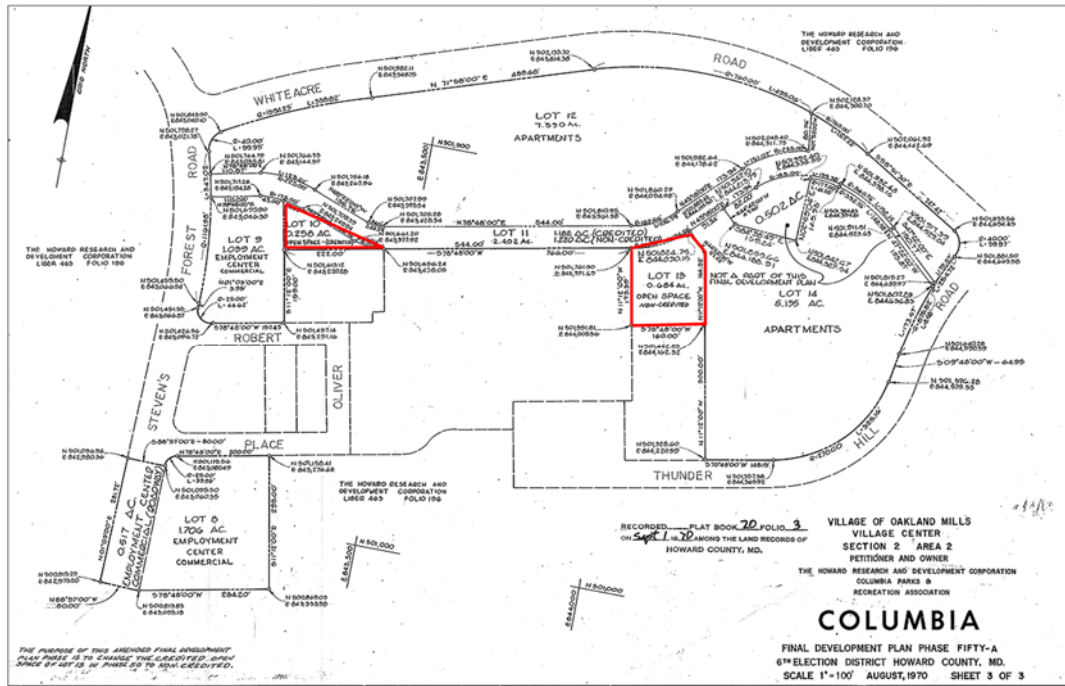
- Address – 5851 Robert Oliver Place (the Other Barn); 5853 Robert Oliver Place (Youth and Teen Center) and 5876 Thunder Hill Road (ice rink and tennis courts).
- Ownership – Columbia Association (CA) is a nonprofit community services corporation that manages Columbia, MD, home to approximately 100,000 people. Columbia was founded in 1967 by the Rouse Company.
- CA owns six lots within the Village Core that are categorized into three components as follows: (see FDP's below):
  1. Lot 2 – credited open space<sup>1</sup> used for parking between the former bank out-parcel and Siam Restaurant comprising 0.314 acres
  2. The Barns (2 buildings, one of which is historic comprising 20,200 sf built in 1969) on 1.026 acres, equating to a 0.45 FAR
    - a) Lot 6 – non-credited open space<sup>1</sup> improved with the Other Barn (11,200 sf) and Teen Center (9,000 sf) on 0.768 acres, for an overall 0.60 FAR
    - b) Lot 10 – credited open space adjacent to the Barns to the north with 0.258 acres
  3. Three lots comprising the Columbia Ice Rink (35,000 sf built in 1971), tennis courts and parking on 2.120 acres, equating to a 0.38 FAR:
    - a) Lot 5 – non-credited open space improved with the Columbia Ice Rink (35,000 sf built in 1971) on 1.140 acres for a 0.70 FAR
    - b) Lot 7 – non-credited open space used for rink parking on 0.300 acres
    - c) Lot 13 – non-credited open space used as two tennis courts on 0.680 acres

#### FDP 40-A-3 with Lots 2, 5, 6 and 7



<sup>1</sup> Columbia New Town zoning established that each large area development district must have a minimum of 36% open space. *Credited* open space counts towards this required minimum percentage, with *non-credited* open space not being counted as part of the minimum. In order to change a *credited* open space to another use, the amount of credited open space would have to be replaced and HRD would have to change the FDP and go through a public process.

FDP 50-A with Lots 10 and 13



- Building Occupancy – Annual patronage estimated by CA at 95,000 for the Columbia Ice Rink, 9,000 for the Other Barn and 15,000+ for the Teen Center. The Other Barn is an historic dairy barn that is used as Oakland Mills Community Association office and hosts weddings, banquets and other community events. The two Barns are connected by a courtyard area.
- Parking Spaces – Lot 5 is used for rink parking and has 31 spaces (under parked by over 140 spaces based on the Howard County Zoning Code requirement of five spaces per 1,000 sf), Lot 2 is used for parking (30+ spaces) and a temporary police substation. Parking for the Barns and overall flow parking for the ice rink is generally observed to occur on the adjoining Cedar shopping center property.
- 2016 Tax Assessments – only Lot 5 has a tax assessment at \$870,900 (\$68,400 land / \$802,500 improvements).
- FDP Phase 40-A-3 and 50-A / Deed Restrictions – Properties have New Town zoning and is subject to the specific FDP requirements. All CA owned land is designated as open space. Two lots (2 and 10) designated as credited open space currently being used for parking. Development on the CA owned lots is subject to OMCA architectural approval.

### **Possible Real Estate Development Scenarios?**

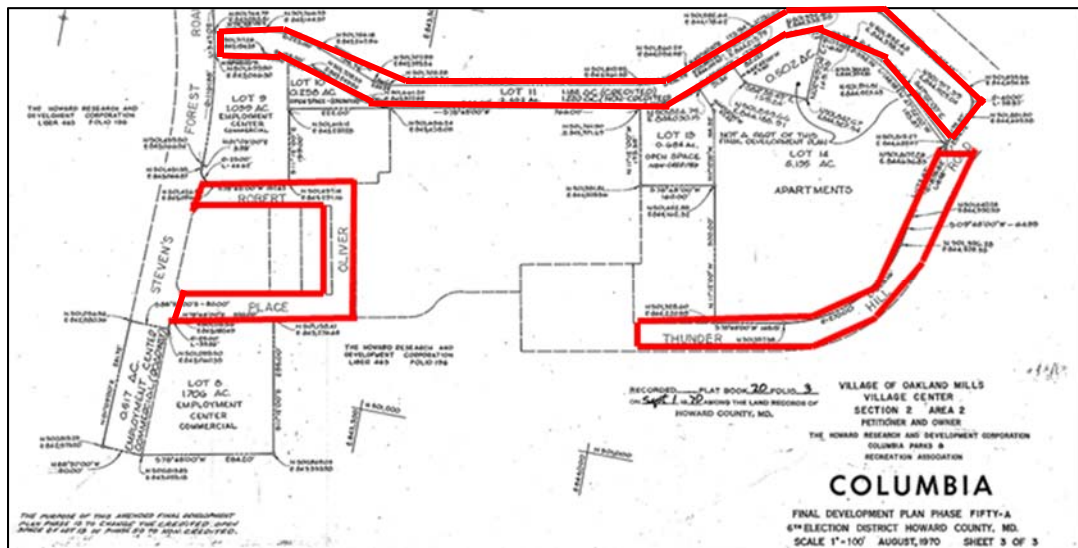
Status Quo: No use changes are currently contemplated. Periodic maintenance and updates are budgeted by CA, including an upcoming \$2.4 million capital investment in the ice rink facility necessary to maintain the existing facility and its current program and use.

Enhanced Development Opportunities: Possible reallocation or consolidation of parking areas / credited and non-credited open space in coordination with other Oakland Mills Village Center objectives.

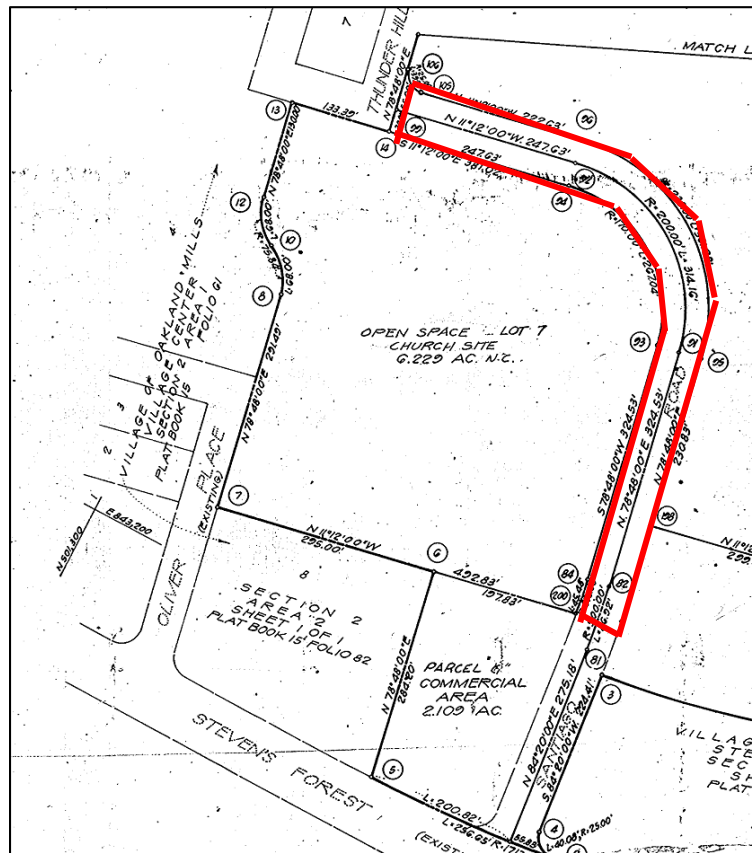
#### 4. Howard County Public Streets, Roads and Rights-of-Way

- Address – Robert Oliver Place, Thunder Hill Road, Multi-Use Pathway and Santiago spanning from Thunder Hill Road to the entrance to the Stevens Forest Professional Center.
- Ownership – Howard County (Department of Transportation with Depart of Public Works oversight).
- Three roads and one rights-of-way totaling approximately 5.68 acres broken down as follows:
  - Robert Oliver Place is approximately 1.05 acres
  - Thunder Hill is approximately 1.24 acres
  - Lot 11 – Right-or-Way for a Multi-Use Pathway totaling 2.4 acres (1.18 acres credited and 1.22 acres non-credited open space) owned by Columbia Association with an easement granted to the Howard County.
  - Santiago Road is estimated at 0.99 acres

#### Robert Oliver Place and Thunder Hill Road FDP 50-A



### Santiago Road FDP 80-A-2



- FDP Phase 50-A and 80-A-2 – A change in use of public roads, streets and/or rights-of-way would require approval by Howard County and HRD.

### Possible Real Estate Development Scenarios?

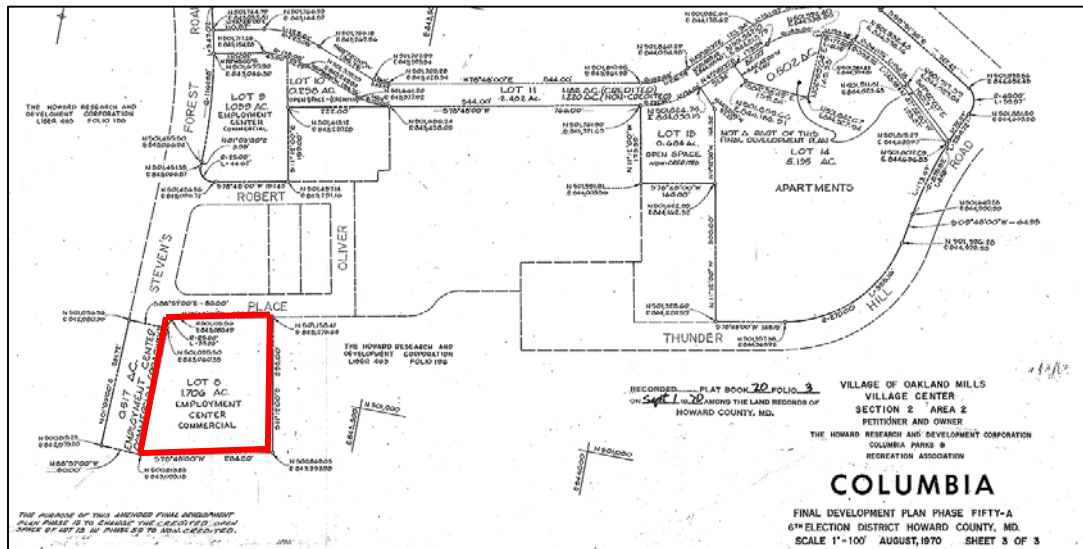
Status Quo: No changes.

Enhanced Development Opportunities: Roads, streets and rights-of-way could be examined to determine if reallocation could be coordinated with possible redevelopment efforts. In addition, there may be public benefits of simplifying / enhancing Oakland Mills Village Center vehicular access.

5. Vacant Former Exxon Site

- Address – 5901 Stevens Forest Road
- Ownership: Oakland Forest LLC.
- Lot 8 – Vacant Exxon Site comprising 1.70 acres fronting Stevens Forest Road

**Vacant Site FDP 50-A**



- Occupancy – A former gas station demolished in the 1990s, the property is currently vacant.
- Access – Formerly provided off both Stevens Forest Road and Robert Oliver Place.
- 2016 Tax Assessments – \$555,300, attributed 100% to land value.
- Purchase Price – \$580,000 in January, 2012
- FDP Phase 50-A / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. Use restrictions carry with the deed (some retail and offices but no residential). In April 2011, a deed was established as a covenant between the Howard Research and Development Corporation and Exxon Mobil Corporation. The deed contains a “Modification of Use Restrictions” clause, which limits use of the property to certain commercial and office uses (i.e. non-residential). The deed also contains a provision that allows the use restrictions to be waived by the assignee to the deed (current owner) with the approval at the option of the Howard Research and Development Corporation. Therefore, alternative uses need HRD consent, owners may petition to amend the FDP through the Village Center Redevelopment process codified in the county’s Zoning Regulations and OM Architectural Committee approvals are needed.

- Environmental Assessment – According to the property owner, there are no outstanding environmental issues that would limit alternative use. In 2002, the Maryland Department of Environment issued a Notice of Compliance with COMAR 26.10.02.01 and 26.10.10.02-03, stating that site conditions do not appear to pose any threat to human health or the environment. The prior fuel storage tanks have been removed, and numerous test well results have proved negative regarding any residual contamination.
- Prior Development Plans – In the late 1990s a concept for senior housing was proposed for the property and in 2008 a plan for a Howard County government services office building with some ground floor retail was advanced. For different reasons neither development initiative succeeded beyond the conceptual level.

### **Possible Real Estate Development Scenarios?**

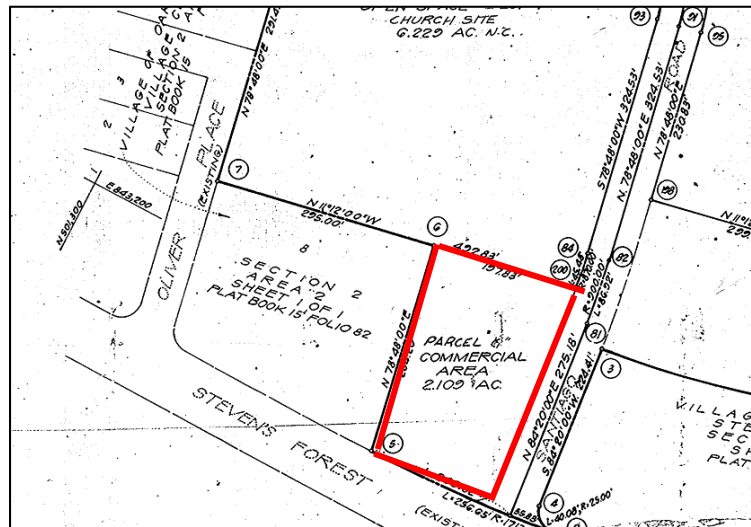
Status Quo: Site may remain vacant or developed for a standalone convenience retail operation.

Enhanced Development Opportunities: Possible mixed-use redevelopment, including some form of consolidated lot development with adjoining properties.

## 6. Stevens Forest Professional Center

- Address – 9550 Santiago Road
- Ownership – There are nine different owners of 22 condominium units. Twelve units (55%) are owned by Whalen Properties. Whalen Property is a Maryland-based, privately owned commercial real estate company that also manages the property.
- Parcel G – Stevens Forest Professional Center (SFPC) includes a 24,720 sf two level building built in 1985. The land totals 1.26 acres, equating to a 0.45 FAR.

### SFPC FDP 80-A-2



Note: Although Parcel G is shown as having 2.109 acres on this FDP, the site is actually 1.263 acres.

- Occupancy – 90% to 95%, with one or two units of a total of 22 units being available from time to time for replacement office use. One space has been leased for use as a retail pharmacy since approximately 2013.
- Parking – 44 (accessed from Santiago Rd) plus 36 spaces shared with OMIC (total 80 spaces).
- Access – There is a single point of ingress / egress off Santiago Road plus a connection to the adjoining OMIC parking lot.
- 2016 Tax Assessments – N/A (per unit), but ranges from a total of \$121,400 to \$228,000 per unit.
- FDP Phase 80-2 / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. Use restrictions (department stores) per deed and prohibited lot consolidation for retail use with shopping center.
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### **Possible Real Estate Development Scenarios?**

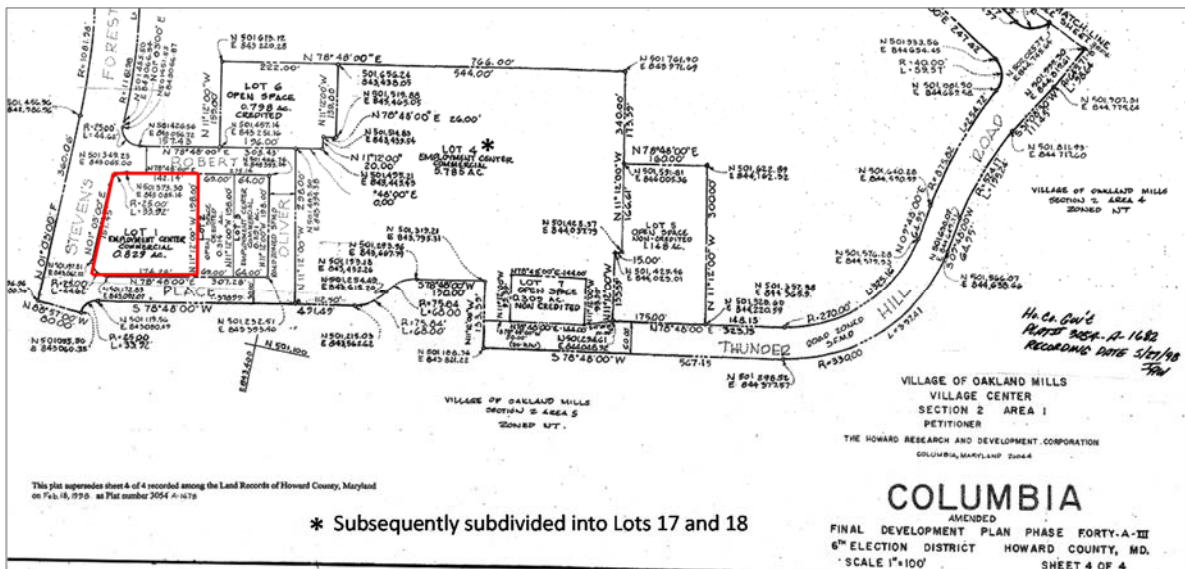
Status Quo: No changes are currently planned.

Enhanced Development Opportunities: The success of the current property for office use, combined with there being 10 different owners, the reasonable longer-term useful life of the existing improvements, and the lack of any significant undeveloped land, renders this property as unlikely for medium-term redevelopment. Should alternative uses emerge for one or both of the adjoining parcels, there may be cause to reconfigure parking spaces currently shared under formal agreement with the adjoining OMIC.

## 7. Siam Spice Restaurant

- Address – 5810 Stevens Forest Road
- Ownership – Helen Vlecidis Trustee
- Lot 1 – 0.82 acres with a 3,910 sf building constructed t in 1988 for fast food use = 0.11 FAR

### Siam Spice FDP 40-A-2



- Occupancy – 100% leased / single restaurant tenant.
- Parking – There are approximately 31 parking spaces.
- Access – Via both sides of Robert Oliver Place in the rear of the property.
- 2016 Tax Assessments – \$1,065,000 broken down as follows:

Lot	Land		Building		Total
	\$	% of Total	\$	% of Total	
1	\$590,565	55%	\$474,435	45%	\$1,065,000

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP Phase 50-A / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. Use restrictions (department stores) per deed and prohibited lot consolidation for retail use with shopping center.

### Possible Real Estate Development Scenarios?

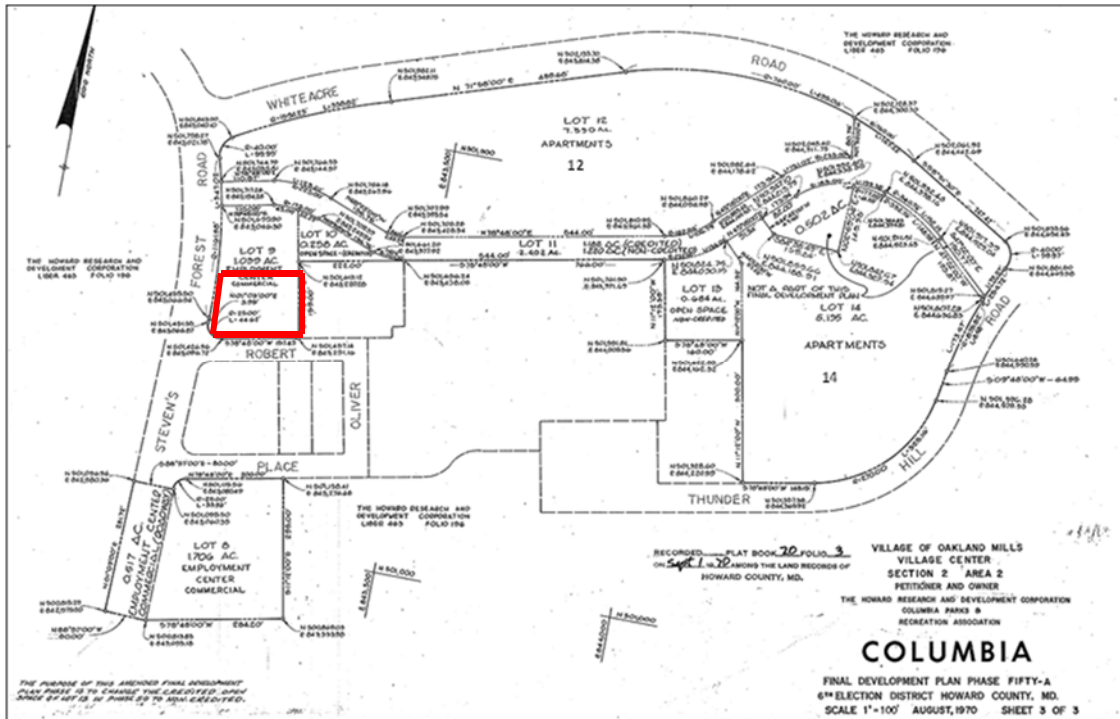
Status Quo: Restaurant operator changed in 2015. No known property changes are planned.

Enhanced Development Opportunities: The property owner could be interested in redevelopment, including some form of consolidated lot development with adjoining properties, deed restrictions notwithstanding.

8. Little Caesars

- Address – 5805 Stevens Forest Road
- Ownership – Layhill Associates, LLC
- Lot 16 (southern part of lot 9) – Little Caesars, former 2,300 sf drive-thru bank built in 1990 on 0.64 acres, equating to 0.08 FAR

**Little Caesars FDP 50-A**



- Occupancy – 100% leased / single restaurant tenant.
- Parking – There are approximately 24 parking spaces.
- Access – There are two points of access, the primary access is directly off Stevens Forest Road (shared with Sam’s Mart) and the secondary access is off Robert Oliver Place.
- 2016 Tax Assessments – \$639,600 broken down as follows:

Lot	Land		Building		Total
	\$	% of Total	\$	% of Total	
16	\$208,400	33%	\$431,200	67%	\$639,600

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP Phase 50-A / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. Use restrictions (residential, department stores) per deed and prohibited lot consolidation for retail use with shopping center.

### **Possible Real Estate Development Scenarios?**

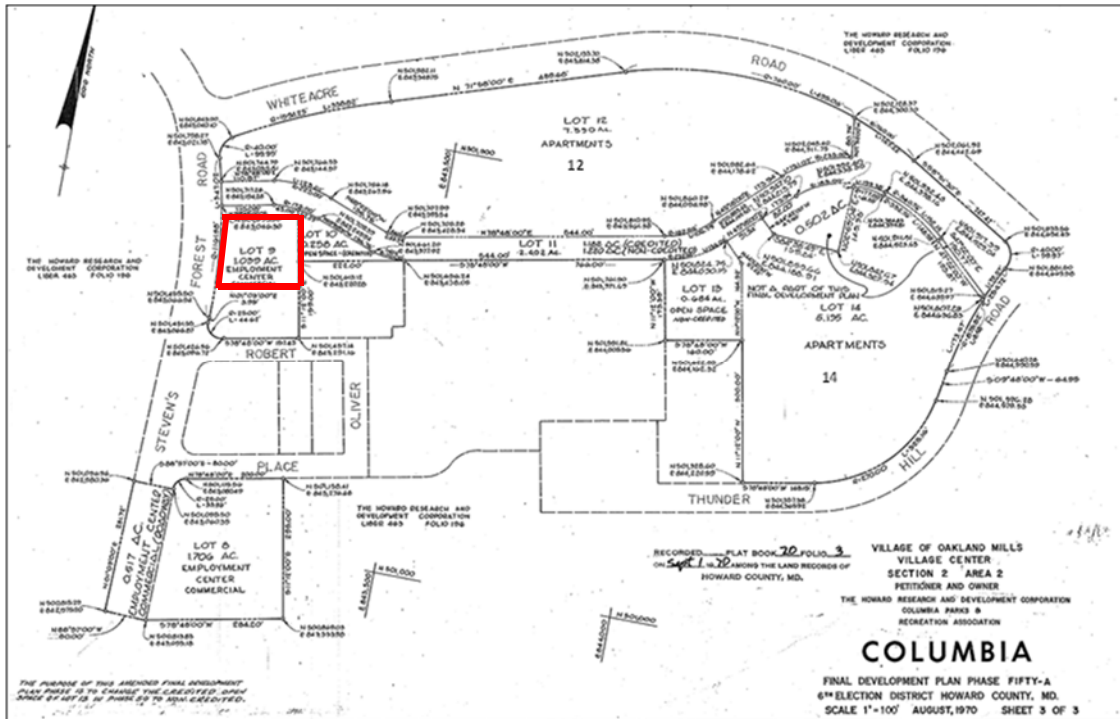
Status Quo: No changes.

Enhanced Development Opportunities: The property owner could be interested in redevelopment, including some form of consolidated lot development with adjoining properties.

9. Sam’s Mart

- Address – 5801 Stevens Forest Road
- Ownership – Clover Farms Dairy, Inc. is an entity affiliated with Royal Farms, a convenience food service chain established in 1959 that is headquartered in Baltimore.
- Lot 15 (northern portion of Lot 9) – Sam’s Mart (2,785 sf built in 1990) on 0.401 acres equating to 0.16 FAR

**Sam’s Mart FDP 50-A**



- Occupancy – 100% leased for convenience store use.
- Parking – There are an estimated 15 parking spaces.
- Access – There is one point of ingress / egress off of Stevens Forest Road (shared with Little Caesars).
- 2016 Tax Assessments – \$329,300 broken down as follows:

Lot	Land		Building		Total
	\$	% of Total	\$	% of Total	
15	\$123,948	38%	\$205,319	62%	\$329,267

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP Phase 50-A / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. Use restrictions (residential, department stores) per deed and prohibited lot consolidation for retail use with shopping center.

### **Possible Real Estate Development Scenarios?**

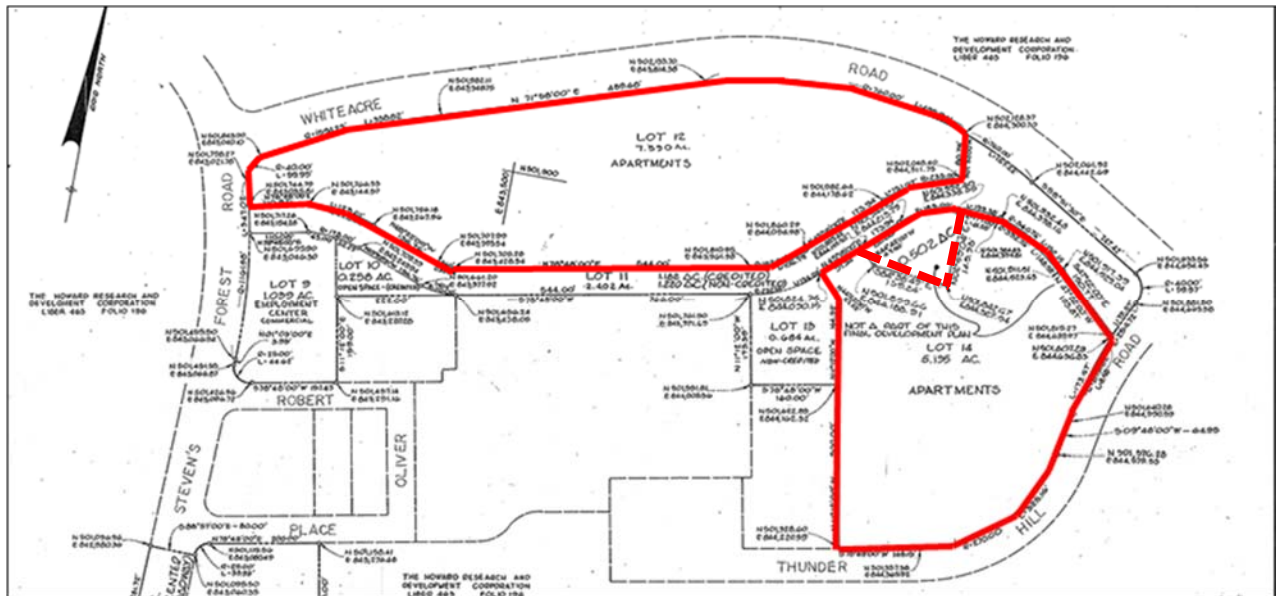
Status Quo: No changes.

Enhanced Development Opportunities: TBD.

## 10. Shadow Oak (SO) Condominiums

- Address – 9625-9653 White Acre Road and 5858-5870 Thunder Hill Road.
- Ownership – 192 individual units, 150+ owners.
- Two lots totaling 12.79 acres improved with 190 units (built in 1973): (see FDP 50-A below):
  1. Lot 12 – 130 units (estimated) on 7.59 acres (17 units / acre)
  2. Lot 14 – 60 units (estimated) on 5.195 acres (11.5 units / acre)

### Shadow Oak Condominium FDP 50-A



Note: Within the illustrated boundaries for Lot 14, there is a half-acre cemetery (red dashed area) that is not developable and is not included in the 5.195 acres

- Occupancy – 95%, of which approximately 50% are rented (per SO estimate).
- Parking Spaces – 325 + - equating to 1.7 spaces per unit.
- Access – There are two points of access, one off White Acre Road and the other off Thunder Hill Road. There are established pedestrian links between the two properties.
- Open space – Concentrated at the intersection of White Acre and Stevens Forest roads, originally planned as amenity space but never built, comprising an estimated 37,000 sf (0.85 acre).
- 2016 Tax Assessments – N/A (per unit)
- 2016 Sales – There were 12 units sold in 2016 through October with prices ranging from approximately \$85 psf to \$115 psf.
- FDP Phase 50-A / Deed Restrictions – Property has New Town zoning and is subject to its land use requirements as well as the specific FDP requirements. FDP permits up to 250 units, meaning 58 more units could presumably be built, providing there is remaining residential density under New Town zoning when a proposal for more units comes forward.

### **Possible Real Estate Development Scenarios?**

Status Quo: Recent investments comprise securing / enclosing the stairwells (all garden walk ups). Possible pedestrian and vehicular access modifications with any bus and road network adjustments.

Enhanced Development Opportunities: Possible development of unbuilt units recorded in FDP.

*Ongoing Needs:* Limiting impact of surrounding community and property owners onto condominium association private property.

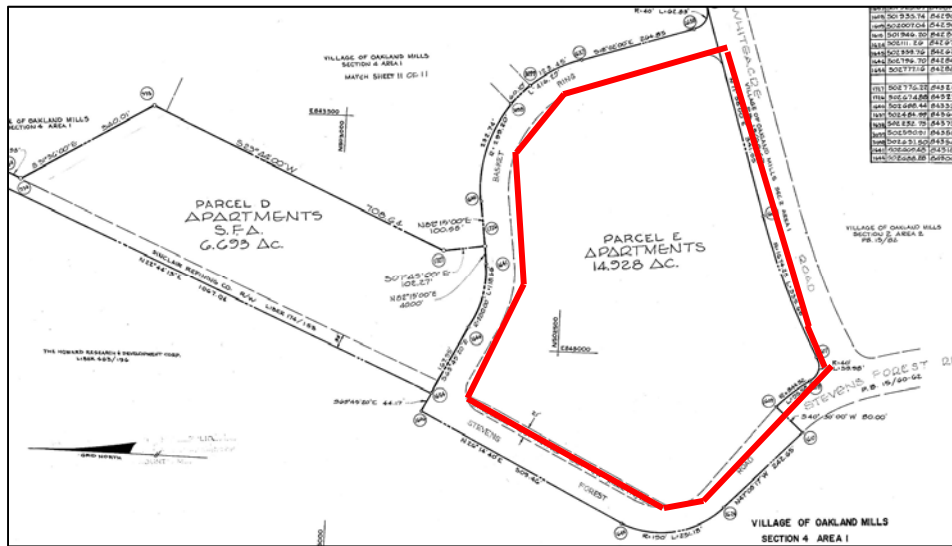
*Possible Alternative Land Use and Development:* Possible pathway and access point realignments could be contemplated. New development might be accommodated on the vacant land at the intersection of White Acre and Stevens Forest roads and along the pathway right-of-way if relocated. New development would need to not encroach on existing units open space or viewscales.



### 11. Verona at Oakland Mills

- Address – 9650 White Acre Road
- Ownership – Housing Commission is an independent State chartered public housing authority that provides housing opportunities for by developing and managing housing resources for low and moderate income Howard County residents.
- Two lots totaling 16.7 acres improved with 251 garden style apartments (built in 1972):
  1. Parcel E North – 180 units housed in 11 buildings on 11.94 acres (15 units / acre):

#### Verona North FDP 51



2. Parcel E South – 71 units housed in two buildings on 4.77 acres (15 units / acre):

#### Verona FDP 79-A-3



- Occupancy – 95+ % leased as of August 2016.
- Parking – 1.5 spaces per unit.
- Access – There are multiple points of access off Basking Ridge Road, Stevens Forest Road and White Acre Road.
- Purchase Price - \$39,500,000 in 10/2013 (approximately \$157,400 per unit) or \$2.4M per acre as improved.
- 2016 Tax Assessments – The two parcels comprising the Verona are broken down as follows:

Parcel	Land		Building		Total
	\$	% of Total	\$	% of Total	
E - North	\$4,341,221	25%	\$13,241,146	75%	\$17,582,367
E - South	\$1,765,804	27%	\$4,766,921	73%	\$6,523,333
<b>Total:</b>	<b>\$6,107,025</b>	<b>25%</b>	<b>\$18,008,067</b>	<b>75%</b>	<b>\$24,105,700</b>

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP 51 and 79-A-3 / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. FDP permits up to 220 units on the Verona North, meaning 40 more units could presumably be built without additional density approvals. Verona South has approval for 72 units. Both properties are subject to a height limit at 34 feet in addition to building setbacks.

### Possible Real Estate Development Scenarios?

Status Quo: Ongoing grounds, building and apartment unit interior capital improvements.

Enhanced Development Opportunities: Verona South has current open space facing Stevens Forest Road that may be feasible for medium-term development. The Verona owner has a stated interest in longer-term residential redevelopment for both Verona South and Verona North.

**RealProperty ResearchGroup**

**Verona at Oakland Mills**

**Multifamily Community Profile**

9650 White Acre Road  
Columbia, MD 21045

Map Ref: HO 15-J07

Community Type: Market Rate - General

Structure Type: 3-Story Garden

250 Units 2.0% Vacant (5 units vacant) as of 9/18/2015

Last Major Rehab in 2008 Opened in 1971



Unit Mix & Effective Rent (1)					Community Amenities	
Bedroom	%Total	Avg Rent	Avg SqFt	Avg \$/SqFt	Clubhouse:	Pool-Outdr:
Eff	--	--	--	--	<input type="checkbox"/>	<input type="checkbox"/>
One	34.0%	\$1,142	688	\$1.66	Comm Rm: <input type="checkbox"/>	Basketball: <input type="checkbox"/>
One/Den	2.4%	\$1,211	712	\$1.70	Centrl Lndry: <input checked="" type="checkbox"/>	Tennis: <input type="checkbox"/>
Two	20.4%	\$1,190	845	\$1.41	Elevator: <input type="checkbox"/>	Volleyball: <input type="checkbox"/>
Two/Den	28.8%	\$1,251	861	\$1.45	Fitness: <input type="checkbox"/>	CarWash: <input type="checkbox"/>
Three	14.4%	\$1,735	1,171	\$1.48	Hot Tub: <input type="checkbox"/>	BusinessCtr: <input type="checkbox"/>
Four+	--	--	--	--	Sauna: <input type="checkbox"/>	ComputerCtr: <input type="checkbox"/>
					Playground: <input checked="" type="checkbox"/>	
Features						
Standard: Dishwasher; Disposal; Ceiling Fan; In Unit Laundry (Full Size); Central A/C; Patio/Balcony; Carpet / Vinyl/Linoleum						
Select Units: Ice Maker; Storage						
Optional(\$): --						
Security: --						
Parking 1: Free Surface Parking			Parking 2: --			
Fee: --			Fee: --			
Property Manager: Greystar						
Owner: HCHC						

**Comments**

All renovated units have W/D. Trash fee is \$20.  
No handicap accessible units. Renovations made as units become vacant.

Floorplans (Published Rents as of 9/18/2015) (2)									Historic Vacancy & Eff. Rent (1)				
Description	Feature	BRs	Bath	#Units	Rent	SqFt	Rent/SF	Program	Date	%Vac	1BR \$	2BR \$	3BR \$
Standard A1 / Garden	--	1	1	31	\$985	591	\$1.67	Market	9/18/15	2.0%	\$1,146	\$1,226	\$1,735
A1 / Garden	Den	1	1	6	\$1,186	712	\$1.67	Market	3/18/15	2.8%	\$1,213	\$1,315	\$1,679
Deluxe A1 / Garden	--	1	1	54	\$1,192	743	\$1.60	Market	8/25/14	0.0%	\$1,144	\$1,376	\$1,892
Standard B1 / Garden	--	2	1	27	\$1,018	740	\$1.38	Market	5/23/14	2.0%	\$1,048	\$1,387	\$1,864
B1 / Garden	Den	2	1	72	\$1,221	861	\$1.42	Market					
Deluxe B1 / Garden	--	2	1	6	\$1,232	927	\$1.33	Market					
Standard B2 / Garden	--	2	2	18	\$1,349	975	\$1.38	Market					
Standard C1 / Garden	--	3	2	36	\$1,700	1,171	\$1.45	Market					
Adjustments to Rent													
Incentives: None													
Utilities in Rent: Heat Fuel: Natural Gas													
Heat: <input type="checkbox"/> Cooking: <input type="checkbox"/> Wtr/Swr: <input type="checkbox"/>													
Hot Water: <input type="checkbox"/> Electricity: <input type="checkbox"/> Trash: <input type="checkbox"/>													

Verona at Oakland Mills

MD027-000888

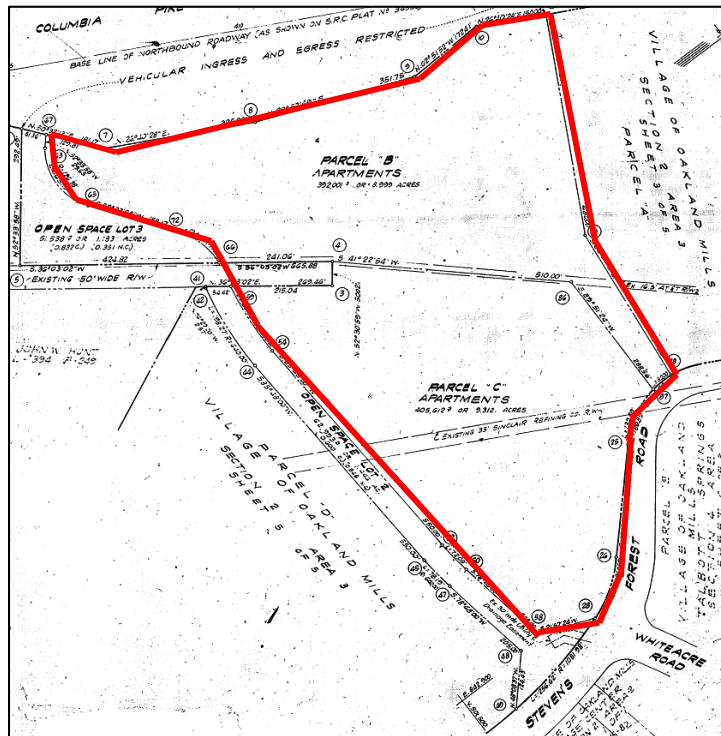
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(1) Effective Rent is Published Rent, net of concessions and assumes that water, sewer and trash is included in rent  
(2) Published Rent is rent as quoted by management.

## 12. Grand Pointe Apartments

- Address – 5764 Stevens Forest Road
- Ownership – Morgan Properties is a real estate investment and management company headquartered in King of Prussia, Pennsylvania.
- Two parcels totaling 18.32 acres improved with 322 units (17.5 units / acre): (see FDP 79-A-3)
  - Parcels B – 154 garden units on 8.99 acres (built in 1973)
  - Parcels C – 168 high-rise units on 9.31 acres (built in 1985)

### Grand Pointe FDP 79-A-3



- Occupancy – 85+ % leased as of summer 2016.
- Parking – There are an estimated 450+ parking spaces (1.4+ parking spaces per unit).
- Access – There is a single point of ingress / egress off Stevens Forest Road.
- Open Space – There is an estimated acre and a half of open space fronting on Stevens Forest Road just south of the entrance to Grand Pointe.
- Purchase Price – \$47,500,000 in 2016 equating to \$147,500 per unit, or \$2.6M per acre as improved.

- 2016 Tax Assessments – \$31,729,200 broken down as follows:

Parcel	Land		Building		Total
	\$	% of Total	\$	% of Total	
B	\$3,137,640	14%	\$19,465,227	86%	\$22,602,867
C	\$3,384,450	37%	\$5,741,917	63%	\$9,126,367
<b>Total:</b>	<b>\$6,522,090</b>	<b>21%</b>	<b>\$25,207,144</b>	<b>79%</b>	<b>\$31,729,234</b>

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP Phase 79-A-3 / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. FDP permits 324 units with no height limit.

### Possible Real Estate Development Scenarios?

Status Quo: Property currently being renovated to improve infrastructure and other updates (reported \$10M budget).

Enhanced Development Opportunities: TBD.

**RealProperty ResearchGroup**

**Grand Pointe High Rise**

**Multifamily Community Profile**

5764 Stevens Forest Road  
Columbia, MD 21045

Map Ref: HO 15-J07

Community Type: Market Rate - General

Structure Type: 9-Story Highrise

168 Units 3.0% Vacant (5 units vacant) as of 9/18/2015

Last Major Rehab in 2000 Opened in 1973



Unit Mix & Effective Rent (1)					Community Amenities	
Bedroom	%Total	Avg Rent	Avg SqFt	Avg \$/SqFt		
Eff	--	--	--	--	Clubhouse: <input checked="" type="checkbox"/>	Pool-Outdr: <input checked="" type="checkbox"/>
One	53.6%	\$1,093	675	\$1.62	Comm Rm: <input type="checkbox"/>	Basketball: <input type="checkbox"/>
One/Den	--	--	--	--	Centrl Lndry: <input checked="" type="checkbox"/>	Tennis: <input type="checkbox"/>
Two	46.4%	\$1,278	1,062	\$1.20	Elevator: <input checked="" type="checkbox"/>	Volleyball: <input checked="" type="checkbox"/>
Two/Den	--	--	--	--	Fitness: <input checked="" type="checkbox"/>	CarWash: <input type="checkbox"/>
Three	--	--	--	--	Hot Tub: <input type="checkbox"/>	BusinessCtr: <input type="checkbox"/>
Four+	--	--	--	--	Sauna: <input type="checkbox"/>	ComputerCtr: <input type="checkbox"/>
					Playground: <input type="checkbox"/>	

**Features**  
Standard: Dishwasher; Disposal; Central A/C; Patio/Balcony; ADA Access; Carpet / Vinyl/Linoleum

Select Units: Ceiling Fan

Optional(\$): --

Security: Keyed Bldg Entry

Parking 1: Free Surface Parking Fee: --  
Parking 2: -- Fee: --

Property Manager: AIMCO  
Owner: AIMCO

**Comments**

Formerly known as "Tor High Rise", sold by Dreyfuss to AIMCO.  
All high-rise units are handicap accessible.

Floorplans (Published Rents as of 9/18/2015) (2)									Historic Vacancy & Eff. Rent (1)				
Description	Feature	BRs	Bath	#Units	Rent	SqFt	Rent/SF	Program	Date	%Vac	1BR \$	2BR \$	3BR \$
Dewey / High Rise - Eleve	--	1	1	45	\$1,024	576	\$1.78	Market	9/18/15	3.0%	\$1,093	\$1,278	--
Bethany / High Rise - Ele	--	1	1	45	\$1,111	774	\$1.44	Market	3/16/15	--	\$974	\$1,231	--
Wilmington / High Rise -	--	2	2	78	\$1,248	1,062	\$1.18	Market	8/26/14	1.2%	\$1,175	\$1,377	--
									5/22/14	3.0%	\$1,036	\$1,300	--

**Adjustments to Rent**

Incentives:  
None

Utilities in Rent: Heat Fuel: Natural Gas  
Heat:  Cooking:  Wtr/Swr:   
Hot Water:  Electricity:  Trash:

Grand Pointe High Rise

MD027-000893

**RealProperty ResearchGroup**

**Grand Pointe**

**Multifamily Community Profile**

5764 Stevens Forest Road  
Columbia, MD 21045

Map Ref: HO 15-J07

Community Type: Market Rate - General

Structure Type: 3-Story Garden

156 Units 4.5% Vacant (7 units vacant) as of 9/18/2015

Last Major Rehab in 2000 Opened in 1973



Unit Mix & Effective Rent (1)					Community Amenities	
Bedroom	%Total	Avg Rent	Avg SqFt	Avg \$/SqFt	Clubhouse:	Pool-Outdr:
Eff	--	--	--	--	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
One	12.2%	\$1,192	831	\$1.43	Comm Rm: <input type="checkbox"/>	Basketball: <input type="checkbox"/>
One/Den	12.2%	\$1,240	1,011	\$1.23	Centrl Lndry: <input type="checkbox"/>	Tennis: <input type="checkbox"/>
Two	25.6%	\$1,228	1,051	\$1.17	Elevator: <input type="checkbox"/>	Volleyball: <input checked="" type="checkbox"/>
Two/Den	9.6%	\$1,309	1,145	\$1.14	Fitness: <input checked="" type="checkbox"/>	CarWash: <input type="checkbox"/>
Three	40.4%	\$1,537	1,220	\$1.26	Hot Tub: <input type="checkbox"/>	BusinessCtr: <input type="checkbox"/>
Four+	--	--	--	--	Sauna: <input type="checkbox"/>	ComputerCtr: <input type="checkbox"/>
					Playground: <input type="checkbox"/>	

Features	
Standard: Dishwasher; Disposal; In Unit Laundry (Full Size); Central A/C; Patio/Balcony; Carpet	
Select Units: Ceiling Fan; ADA Access	
Optional(\$): --	
Security: --	
Parking 1: Free Surface Parking Fee: --	Parking 2: -- Fee: --
Property Manager: AIMCO Owner: AIMCO	

**Comments**

Formerly known as "Tor", sold by Dreyfuss to AIMCO.  
Some accessible units.

**Floorplans (Published Rents as of 9/18/2015) (2)      Historic Vacancy & Eff. Rent (1)**

Description	Feature	BRs	Bath	#Units	Rent	SqFt	Rent/SF	Program	Date	%Vac	1BR \$	2BR \$	3BR \$
Holden/Fenwick / Garden	Den	1	1	19	\$1,215	1,011	\$1.20	Market	9/18/15	4.5%	\$1,216	\$1,250	\$1,537
Carolina / Garden	--	1	1	19	\$1,167	831	\$1.40	Market	3/16/15	--	\$1,222	\$1,307	\$1,487
Rehoboth / Garden	--	2	1.5	40	\$1,198	1,051	\$1.14	Market	8/26/14	5.8%	\$1,426	\$1,437	\$1,745
Carrolla / Garden	Den	2	2	15	\$1,279	1,145	\$1.12	Market	5/13/14	2.6%	\$1,234	\$1,295	\$1,516
Hilton Head/SUNROOM /	Den	3	2	31	\$1,433	1,203	\$1.19	Market					
Charleston/SUNROOM /	Den	3	2	32	\$1,568	1,237	\$1.27	Market					

**Adjustments to Rent**

Incentives:  
None

Utilities in Rent:      Heat Fuel: Natural Gas

Heat:       Cooking:       Wtr/Swr:

Hot Water:       Electricity:       Trash:

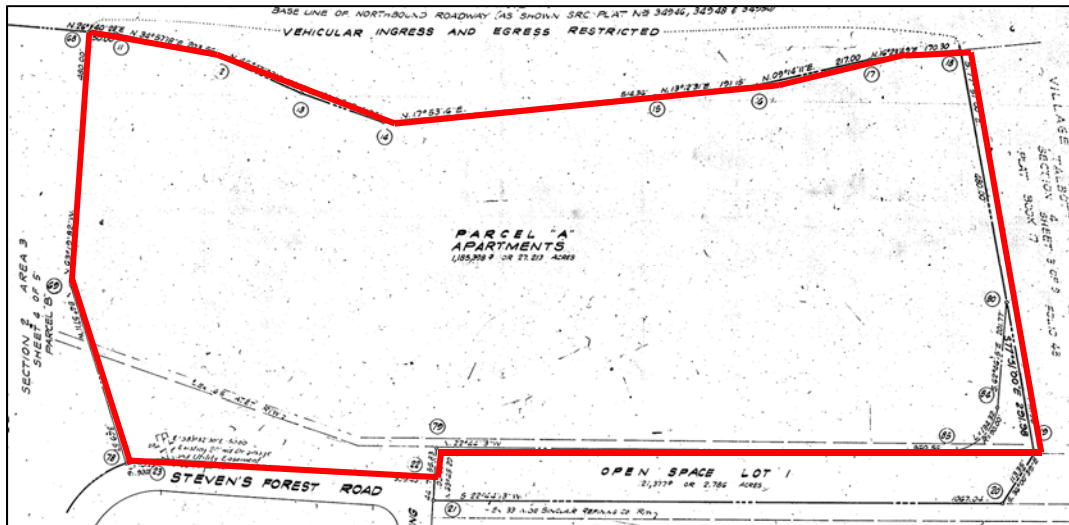
Grand Pointe

MD027-000892

### 13. Autumn Crest Apartments

- Address – 5664 Stevens Forest Road
- Ownership – Grady Management Inc. full service real estate firm located in Silver Spring, Maryland.
- Parcel A – Autumn Crest with 300 units (built in 1973) on 27.21 acres (11 units / acre).

#### Autumn Crest FDP 79-A-3



- Occupancy – 95 + percent leased as of August 2016.
- Parking – There are an estimated 350+ spaces equating to a parking ratio of 1.1 spaces per unit.
- Access – There are three points of access all off Stevens Forest Road (which dead ends into the last cluster of apartments).
- 2016 Tax Assessments – \$20,573,067 broken down as follows:

Parcel	Land		Building		Total
	\$	% of Total	\$	% of Total	
A	\$10,385,153	50%	\$10,187,914	50%	\$20,573,067

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP Phase 79-A-3 / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. FDP permits up to 360 units with no height limit

#### Possible Real Estate Development Scenarios?

Status Quo: No major changes.

Enhanced Development Opportunities: TBD.



**RealProperty ResearchGroup**

**Autumn Crest**

**Multifamily Community Profile**

5664 Stevens Forest Road  
Columbia, MD 21045

Map Ref: HO 15-J07

Community Type: Market Rate - General

Structure Type: 3-Story Garden

300 Units

0.7% Vacant (2 units vacant) as of 9/18/2015

Opened in 1970



Unit Mix & Effective Rent (1)					Community Amenities	
Bedroom	%Total	Avg Rent	Avg SqFt	Avg \$/SqFt	Clubhouse:	Pool-Outdr:
Eff	--	--	--	--	<input type="checkbox"/>	<input type="checkbox"/>
One	34.0%	\$1,095	708	\$1.55	Comm Rm:	Basketball:
One/Den	16.0%	\$1,240	916	\$1.35	<input type="checkbox"/>	<input type="checkbox"/>
Two	25.0%	\$1,324	1,009	\$1.31	Centrl Lndry:	Tennis:
Two/Den	17.0%	\$1,450	1,160	\$1.25	<input type="checkbox"/>	<input type="checkbox"/>
Three	8.0%	\$1,645	1,250	\$1.32	Elevator:	Volleyball:
Four+	--	--	--	--	<input type="checkbox"/>	<input type="checkbox"/>
					Fitness:	CarWash:
					<input type="checkbox"/>	<input type="checkbox"/>
					Hot Tub:	BusinessCtr:
					<input type="checkbox"/>	<input type="checkbox"/>
					Sauna:	ComputerCtr:
					<input type="checkbox"/>	<input type="checkbox"/>
					Playground:	<input checked="" type="checkbox"/>
Features						
Standard: Dishwasher; Disposal; Ice Maker; Ceiling Fan; In Unit Laundry (Full Size); Central A/C; Carpet / Vinyl/Linoleum						
Select Units: Patio/Balcony						
Optional(\$): --						
Security: --						
Parking 1: Free Surface Parking			Parking 2: --			
Fee: --			Fee: --			
Property Manager: Grady Management						
Owner: --						

**Comments**

300+ parking spaces.  
No handicap accessible units.

**Floorplans (Published Rents as of 9/18/2015) (2)**

**Historic Vacancy & Eff. Rent (1)**

Description	Feature	BRs	Bath	#Units	Rent	SqFt	Rent/SF	Program	Date	%Vac	1BR \$	2BR \$	3BR \$
A / Garden	Patio/Balcony	1	1	102	\$1,115	708	\$1.57	Market	9/18/15	0.7%	\$1,141	\$1,375	\$1,645
C / Garden	Den	1	1	24	\$1,255	904	\$1.39	Market	3/18/15	--	--	--	--
B / Garden	Den	1	1	24	\$1,265	928	\$1.36	Market	8/26/14	2.0%	\$1,035	\$1,256	\$1,496
E / Garden	--	2	1.5	51	\$1,355	1,058	\$1.28	Market	5/6/14	2.3%	\$1,074	\$1,241	\$1,685
F / Garden	Den	2	2	51	\$1,475	1,160	\$1.27	Market					
D / Garden	--	2	1	24	\$1,335	904	\$1.48	Market					
G / Garden	--	3	2	24	\$1,675	1,250	\$1.34	Market					

**Adjustments to Rent**

Incentives:  
None

Utilities in Rent: Heat Fuel: Natural Gas  
Heat:  Cooking:  Wtr/Swr:   
Hot Water:  Electricity:  Trash:

Autumn Crest

MD027-000887

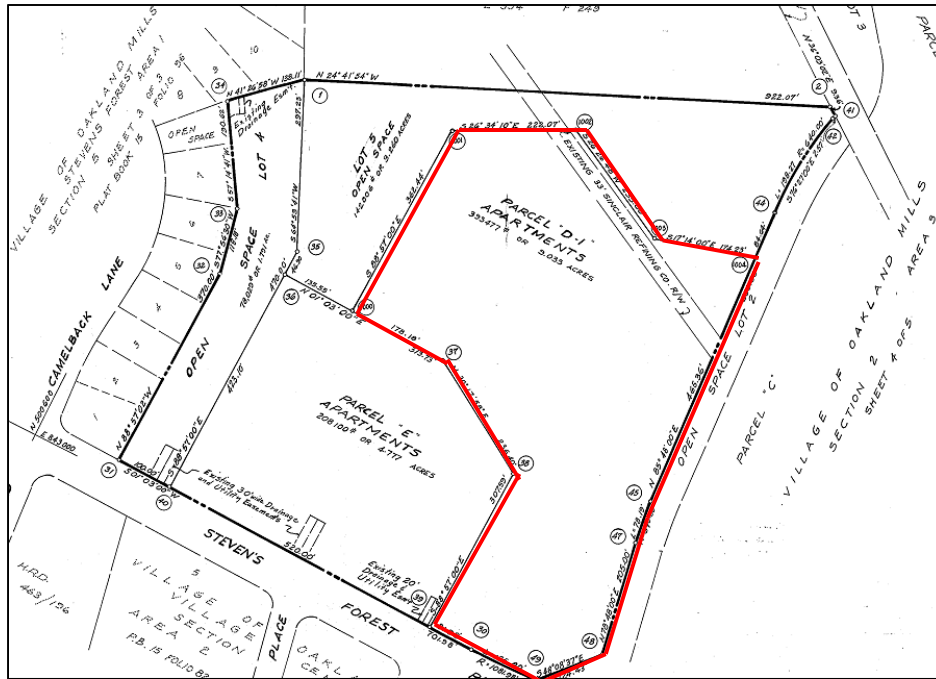
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(1) Effective Rent is Published Rent, net of concessions and assumes that water, sewer and trash is included in rent  
(2) Published Rent is rent as quoted by management.

### 14. Forest Ridge Apartments

- Address – 5890 Stevens Forest Road
- Ownership – Enterprise Communities, an affordable housing owner and manager. The ownership is structured under federal tax laws requiring the development to be marketed and managed for income limited tenants.
- Parcel D-1 – 108 affordable units (built in 1972) on 12.293 acres (8.8 units / acre)

**Forest Ridge FDP 79-A-3**



- Occupancy – 100% leased (waiting list) as of August 2016.
- Parking – There is an estimated 150+ parking spaces (parking ratio of 1.5+ spaces per unit).
- Access – There is a single point of ingress / egress off Stevens Forest Road direct across the street from the northernmost Robert Oliver Place entrance to the Oakland Mills Village Center.
- Open Space – There is an estimated half an acre of privately-owned open space fronting on Stevens Forest Road at the entrance to Forest Ridge.
- 2016 Tax Assessments – \$4,007,800 broken down as follows:

Parcel	Land		Building		Total
	\$	% of Total	\$	% of Total	
D-1	\$1,817,112	45%	\$2,190,688	55%	\$4,007,800

Source: Howard County Tax Assessments and Bolan Smart, 10/2016

- FDP Phase 79-A-3 / Deed Restrictions – Property has New Town zoning and is subject to the specific FDP requirements. FDP permits up to 108 units with a height limit at 34 feet

### **Possible Real Estate Development Scenarios?**

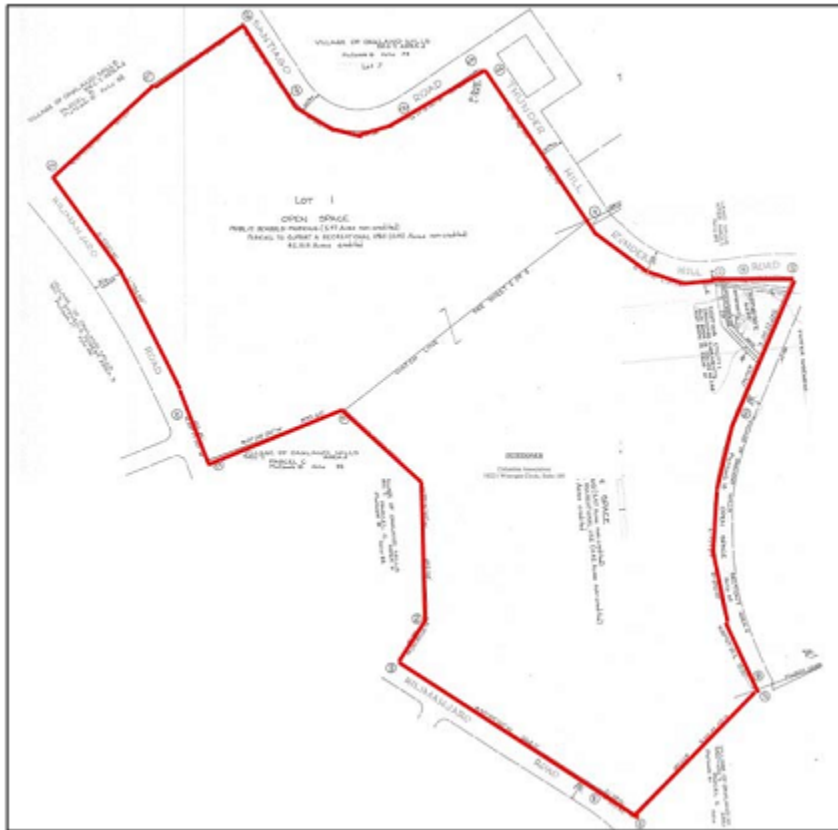
Status Quo: No major changes.

Enhanced Development Opportunities: TBD.

## 15. Oakland Mills Middle and High Schools

- Address – 9410 and 9540 Kilimanjaro Road
- Ownership – Board of Education / Howard County Public School System.
- Lot 1 – Two Howard County public schools (built in 1972 and 1973) on 48.905 acres.

### **Oakland Mills Middle and High Schools FDP 102-A**



- Occupancy (Student Capacity – For the 2015-2016 academic year, Oakland Mills Middle School was at 90% capacity utilization and Oakland Mills High School at 80% capacity utilization. Capacity utilization was calculated by dividing the September 30, 2015 official student enrollment into the Board approved program capacity.
- Parking – There is an estimated 100 parking spaces at the Middle School and over 300 spaces at the High School.
- Access – There is a single point of ingress / egress off Kilimanjaro Road to the Middle School and two points of ingress / egress off Kilimanjaro Road to the High School.
- Open Space – Lot 1 comprises 42.515 acres of credited open space and 6.390 acres of non-credited open space.

- 2016 Tax Assessments – \$19,639,200 broken down as follows:

Parcel	Land		Building		Total
	\$	% of Total	\$	% of Total	
Lot 1	\$4,260,600	22%	\$15,378,600	78%	\$19,639,200

Source: Howard County Tax Assessments and Bolan Smart, 2016

- FDP Phase 102-A / Deed Restrictions – To be used as a public school and parking to support a recreational use.
- 2015 Village Center Community Plan – There is no recommended change to the use of this site. Continued use as public schools.

### **Possible Real Estate Development Scenarios?**


Status Quo: No major changes. See attached memorandum from the Howard County Public School System.

## **APPENDIX B**

### ***Howard County Public School System Letter***



TO: Kristin O’Conner, AICP, Division Chief,  
Comprehensive and Community Planning  
Howard County Department of Planning and Zoning

FROM: Bruce Gist, Executive Director  
Capital Planning and Operations 

DATE: December 12, 2016

**SUBJECT: Oakland Mills Middle and High Schools**

Thank you for the opportunity to respond to the Oakland Mills Village community questions regarding redevelopment of the Howard County Public School System (HCPSS) property in the Oakland Mills Village Center area. HCPSS is not able to sell property directly to private developers under state regulations (COMAR 23.03.02.23). In order to dispose of land, the Howard County Board of Education must first find that the property is no longer needed for school purposes and then the Board of Education must transfer the property to the county government. After the transfer of property, the county government “may use, sell, lease or otherwise dispose of, except by gift” (COMAR 23.03.02.24).

The HCPSS does not foresee Oakland Mills Middle (OMMS) or High School (OMHS) property, or any portion thereof, to be deemed no longer needed for school use. OMHS and OMMS are both lacking in field acreage based on the current education specifications. If in the future, it is determined that a renovation/addition is warranted, the school system will need flexibility within the existing site to provide the necessary educational programs and associated accessory/outdoor spaces for the students who attend the schools.

For your convenience, school year 2015–2016 Community Use data is attached. The OMHS and OMMS facilities are used frequently by the community, including Howard County Soccer Association (SAC), Howard County Recreation and Parks, Columbia Youth Baseball Association, multiple religious organizations, and Girls on the Run. Outdoor spaces were used for 3,553 hours beyond normal school hours for after school and community activities in school year 2015–2016.

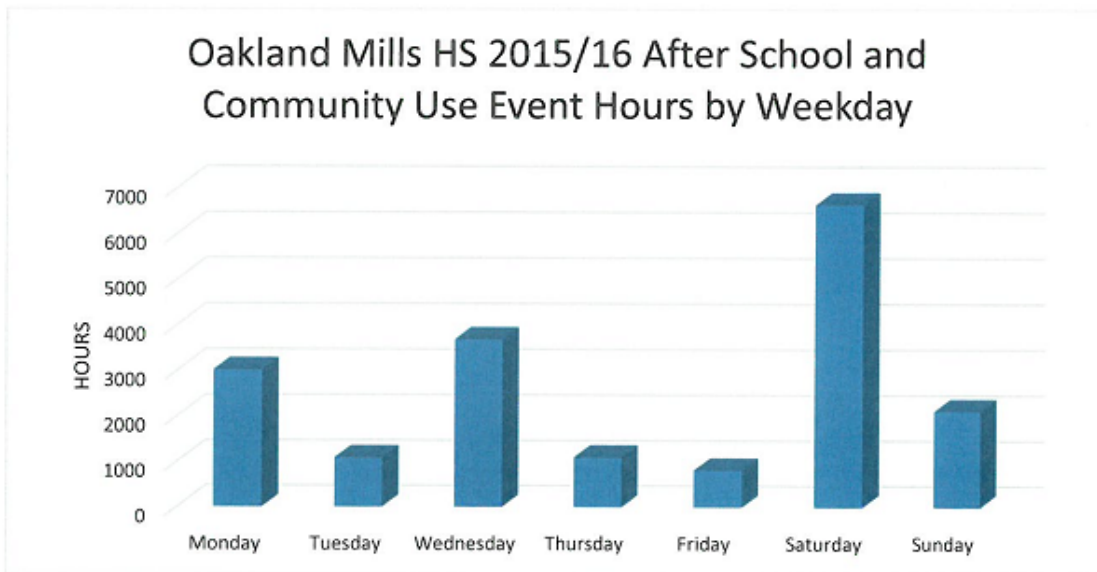
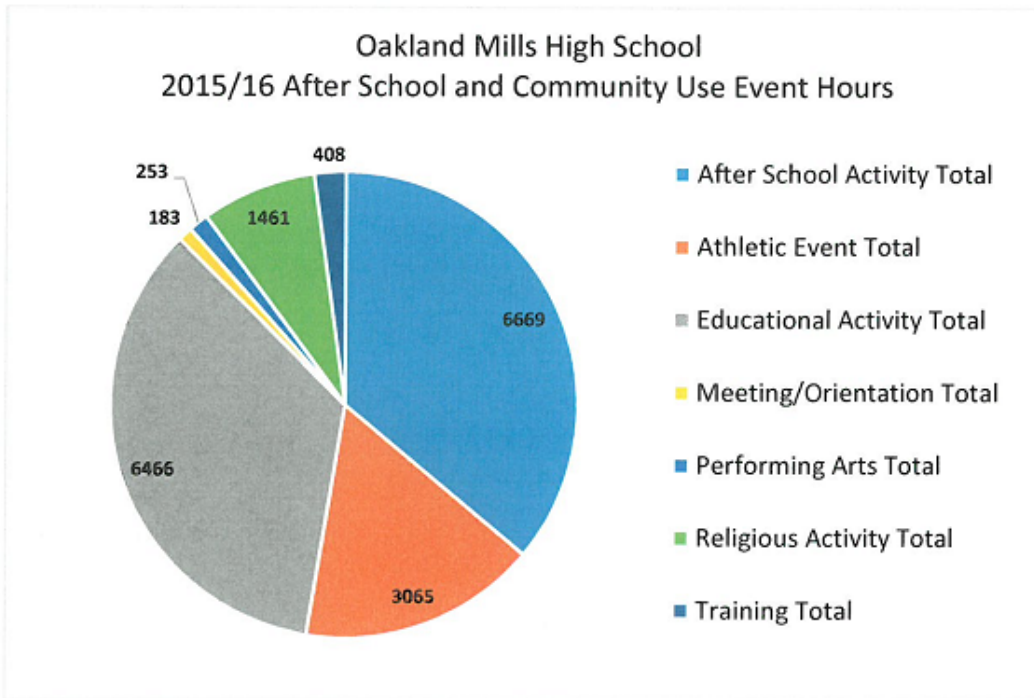
Should there be additional questions or concerns, please feel to contact our offices at 410.313.6798.

Encl.

cc: Renee A. Foose, Ed.D., Superintendent  
Anissa Brown Dennis, Acting Chief Operating Officer  
Olivia Claus, Executive Director, School Facilities  
Renée M. Kamen, AICP, Manager Office of School Planning

### ATTACHMENT 1

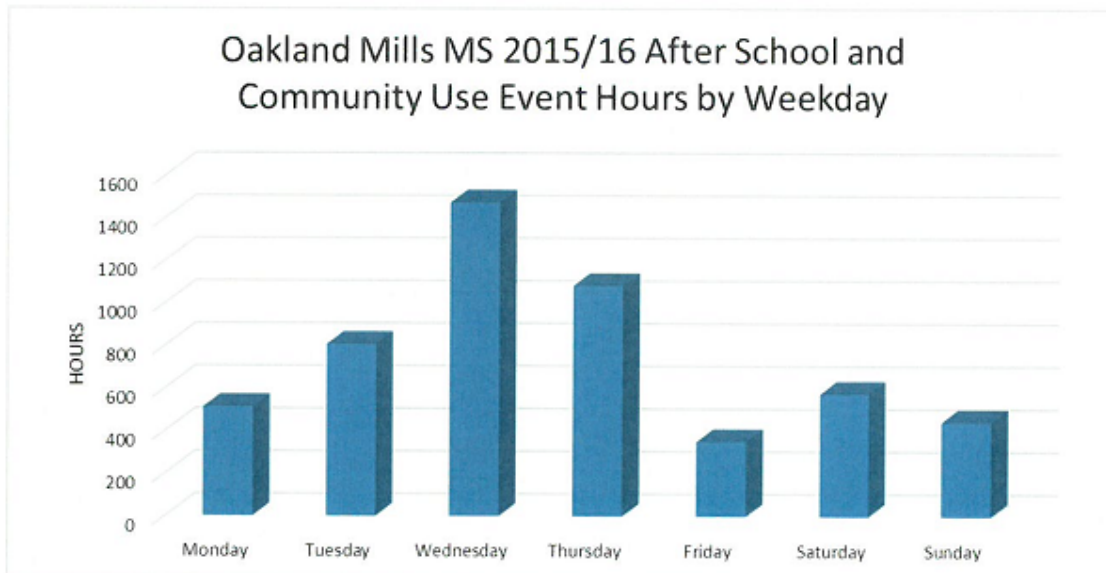
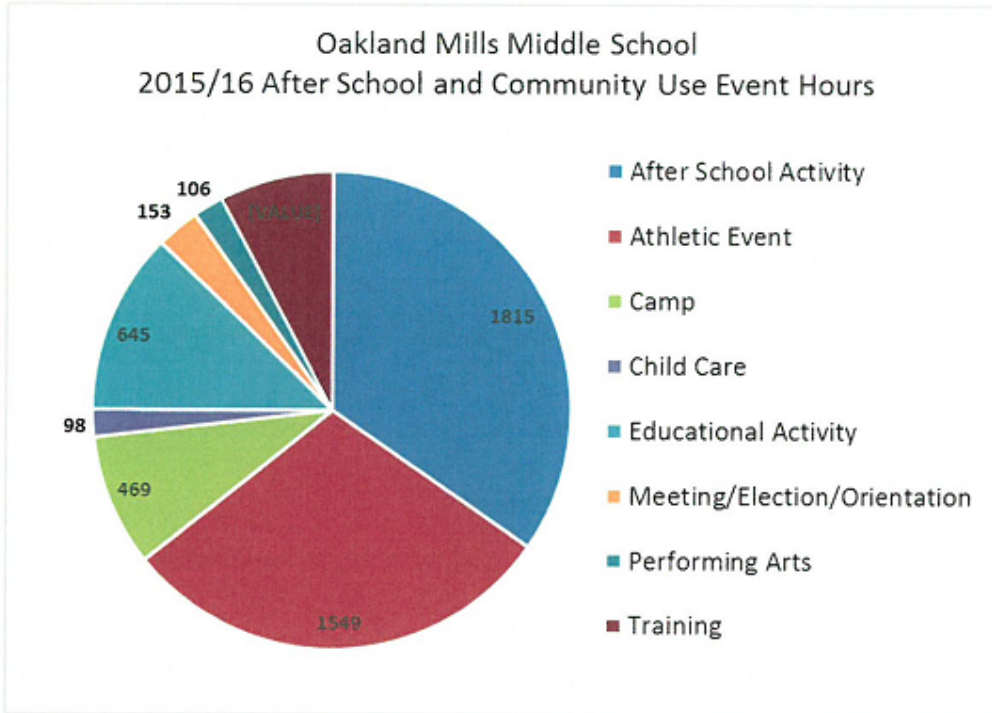
#### Oakland Mills High School After School and Community Use





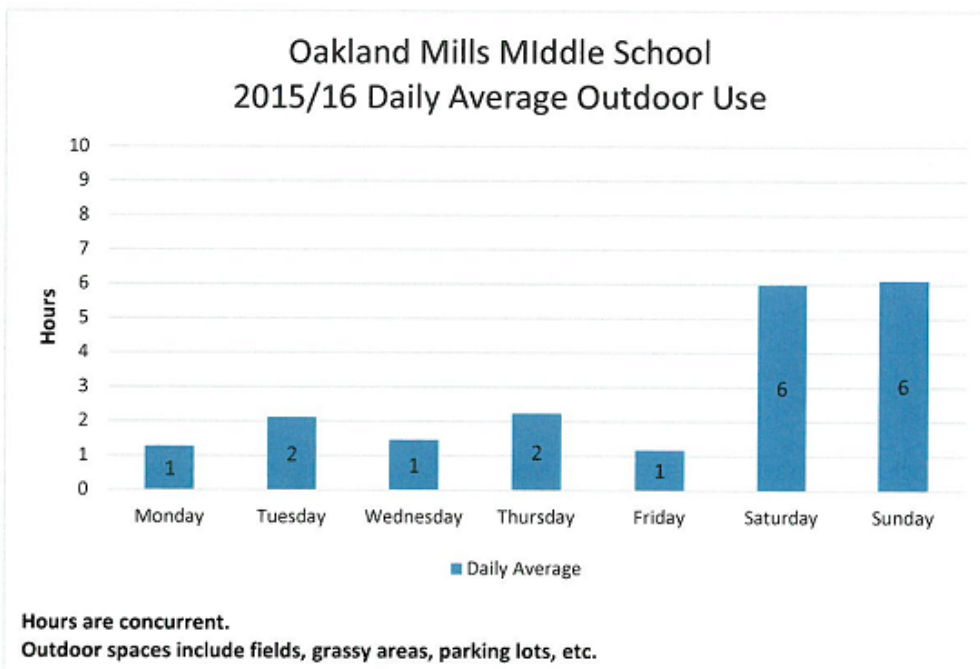
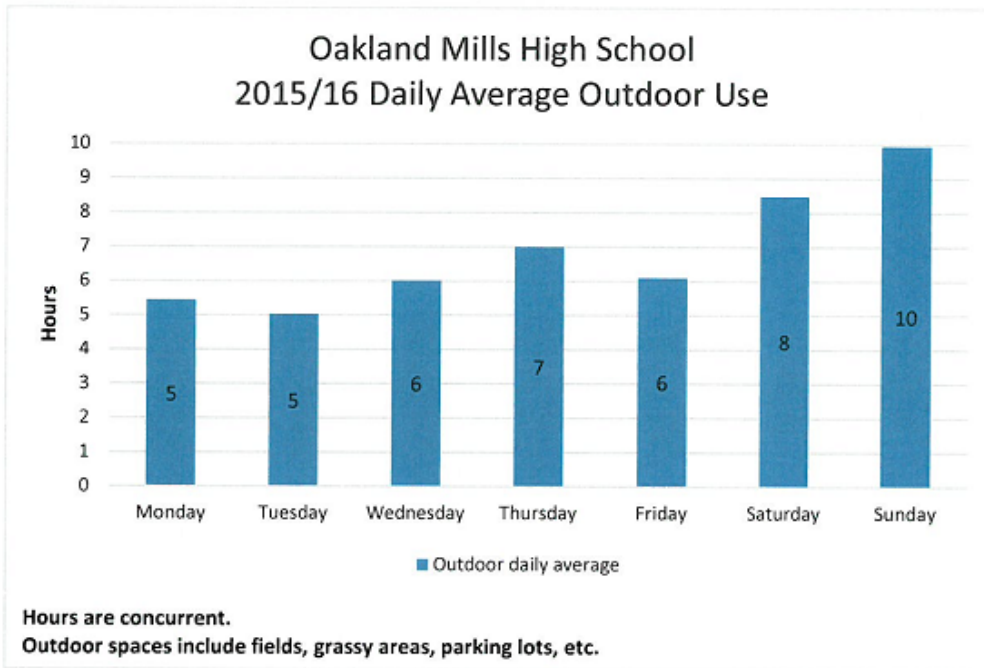
## ATTACHMENT 2

### Oakland Mills Middle School After School and Community Use



### ATTACHMENT 3

#### Oakland Mills High and Middle Schools Average Outdoor Use (Hours)



## **APPENDIX C**

### ***Demographic Data***

**Oakland Mills Village Center Area Redevelopment Feasibility Study  
2016 Demographic Highlights**

<i>Description</i>	<i>OMVC 5 Minutes</i>	<i>Stevens Forest</i>	<i>Talbott Springs</i>	<i>Thunder Hill</i>	<i>OM Neighborhoods Total</i>	<i>OMVC Boundary Area</i>	<i>Columbia</i>	<i>Howard County</i>	<i>Maryland</i>
Population	12,240	2,660	4,501	1,575	8,736	2,382	103,689	314,633	6,038,125
Race (%):									
White Alone	43.3%	48.7%	32.8%	63.9%	43.2%	32.5%	50.3%	56.7%	55.7%
Asian	9.0%	5.9%	8.7%	7.4%	7.6%	9.4%	14.1%	17.8%	6.5%
Black or African American	32.7%	31.1%	36.9%	22.9%	32.6%	35.4%	26.8%	18.6%	29.7%
Other	15.0%	14.2%	21.7%	5.9%	16.4%	22.6%	8.9%	6.9%	8.2%
Hispanic	17.4%	15.7%	26.1%	6.8%	19.4%	26.8%	9.3%	6.8%	10.0%
Households (HH)	4,640	971	1,769	570	3,310	995	40,861	113,453	2,236,608
Average HH Size	2.63	2.73	2.54	2.75	2.63	2.39	2.53	2.75	2.64
Median Age	35.9	39.2	32.7	43.5	36.1	32.6	38.6	39.4	39.4
Median HH Income	\$83,330	\$110,435	\$62,319	\$106,472	\$80,467	\$58,020	\$100,977	\$110,412	\$75,297
Average HH Income	\$97,703	\$126,926	\$69,502	\$118,522	\$94,789	\$67,686	\$122,599	\$141,870	\$98,571
% Homes Owner Occupied	57.7%	76.4%	36.1%	95.8%	58.2%	29.3%	63.2%	71.6%	65.2%
% Family Households	42.3%	74.2%	60.5%	80.7%	68.0%	59.8%	65.1%	72.4%	66.6%
# of Business Establishments	438	N/A	N/A	N/A	248	52	5,555	12,755	227,899
# of Daytime Employees <sup>1</sup>	5,507	N/A	N/A	N/A	2,786	574	85,612	202,315	2,977,690

Source: US Census, ESRI and Bolan Smart, 9/2016



## Demographic and Income Profile

OMVC  
 Robert Oliver Pl, Columbia, Maryland, 21045  
 Drive Time: 5 minute radius

Prepared by Esri  
 Latitude: 39.21009  
 Longitude: -76.84509

Summary	Census 2010	2016	2021			
Population	11,875	12,240	12,887			
Households	4,529	4,640	4,872			
Families	3,076	3,110	3,245			
Average Household Size	2.61	2.63	2.64			
Owner Occupied Housing Units	2,748	2,675	2,795			
Renter Occupied Housing Units	1,781	1,965	2,077			
Median Age	34.4	35.9	36.4			
Trends: 2016 - 2021 Annual Rate	Area	State	National			
Population	1.04%	0.84%	0.84%			
Households	0.98%	0.75%	0.79%			
Families	0.85%	0.68%	0.72%			
Owner HHs	0.88%	0.77%	0.73%			
Median Household Income	1.40%	1.96%	1.86%			
Households by Income	2016		2021			
	Number	Percent	Number	Percent		
<\$15,000	220	4.7%	283	5.8%		
\$15,000 - \$24,999	177	3.8%	172	3.5%		
\$25,000 - \$34,999	278	6.0%	256	5.3%		
\$35,000 - \$49,999	589	12.7%	546	11.2%		
\$50,000 - \$74,999	722	15.6%	579	11.9%		
\$75,000 - \$99,999	816	17.6%	922	18.9%		
\$100,000 - \$149,999	1,041	22.4%	1,194	24.5%		
\$150,000 - \$199,999	472	10.2%	554	11.4%		
\$200,000+	325	7.0%	365	7.5%		
Median Household Income	\$83,330		\$89,328			
Average Household Income	\$97,703		\$104,320			
Per Capita Income	\$37,408		\$39,825			
Population by Age	Census 2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	872	7.3%	830	6.8%	866	6.7%
5 - 9	866	7.3%	853	7.0%	838	6.5%
10 - 14	771	6.5%	859	7.0%	851	6.6%
15 - 19	728	6.1%	734	6.0%	779	6.0%
20 - 24	757	6.4%	809	6.6%	859	6.7%
25 - 34	2,057	17.3%	1,862	15.2%	1,968	15.3%
35 - 44	1,740	14.7%	1,887	15.4%	1,958	15.2%
45 - 54	1,576	13.3%	1,560	12.7%	1,623	12.6%
55 - 64	1,403	11.8%	1,326	10.8%	1,351	10.5%
65 - 74	816	6.9%	1,060	8.7%	1,102	8.6%
75 - 84	233	2.0%	384	3.1%	580	4.5%
85+	57	0.5%	76	0.6%	111	0.9%
Race and Ethnicity	Census 2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
White Alone	5,714	48.1%	5,298	43.3%	5,064	39.3%
Black Alone	3,719	31.3%	4,008	32.7%	4,310	33.4%
American Indian Alone	114	1.0%	111	0.9%	108	0.8%
Asian Alone	882	7.4%	1,101	9.0%	1,354	10.5%
Pacific Islander Alone	5	0.0%	10	0.1%	13	0.1%
Some Other Race Alone	804	6.8%	970	7.9%	1,175	9.1%
Two or More Races	637	5.4%	741	6.1%	863	6.7%
Hispanic Origin (Any Race)	1,781	15.0%	2,126	17.4%	2,533	19.7%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.



## Demographic and Income Profile

OMVC Core  
Area: 0.36 square miles

Prepared by Esri

<b>Summary</b>	<b>Census 2010</b>	<b>2016</b>	<b>2021</b>			
Population	2,232	2,382	2,625			
Households	941	995	1,089			
Families	567	595	649			
Average Household Size	2.37	2.39	2.41			
Owner Occupied Housing Units	312	292	315			
Renter Occupied Housing Units	629	702	775			
Median Age	31.0	32.6	32.8			
<b>Trends: 2016 - 2021 Annual Rate</b>	<b>Area</b>	<b>State</b>	<b>National</b>			
Population	1.96%	0.84%	0.84%			
Households	1.82%	0.75%	0.79%			
Families	1.75%	0.68%	0.72%			
Owner HHs	1.53%	0.77%	0.73%			
Median Household Income	1.95%	1.96%	1.86%			
<b>Households by Income</b>	<b>2016</b>		<b>2021</b>			
	Number	Percent	Number	Percent		
<\$15,000	83	8.3%	115	10.6%		
\$15,000 - \$24,999	31	3.1%	33	3.0%		
\$25,000 - \$34,999	112	11.3%	108	9.9%		
\$35,000 - \$49,999	202	20.3%	199	18.3%		
\$50,000 - \$74,999	170	17.1%	141	12.9%		
\$75,000 - \$99,999	235	23.6%	297	27.3%		
\$100,000 - \$149,999	99	9.9%	120	11.0%		
\$150,000 - \$199,999	49	4.9%	59	5.4%		
\$200,000+	14	1.4%	17	1.6%		
Median Household Income	\$58,020		\$63,901			
Average Household Income	\$67,686		\$71,613			
Per Capita Income	\$26,729		\$28,123			
<b>Population by Age</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	183	8.2%	181	7.6%	200	7.6%
5 - 9	185	8.3%	169	7.1%	178	6.8%
10 - 14	129	5.8%	175	7.3%	167	6.4%
15 - 19	129	5.8%	136	5.7%	174	6.6%
20 - 24	201	9.0%	171	7.2%	199	7.6%
25 - 34	477	21.4%	472	19.8%	500	19.0%
35 - 44	337	15.1%	391	16.4%	419	16.0%
45 - 54	260	11.6%	278	11.7%	310	11.8%
55 - 64	192	8.6%	207	8.7%	230	8.8%
65 - 74	111	5.0%	151	6.3%	155	5.9%
75 - 84	25	1.1%	44	1.8%	82	3.1%
85+	3	0.1%	8	0.3%	11	0.4%
<b>Race and Ethnicity</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
White Alone	815	36.5%	775	32.5%	772	29.4%
Black Alone	777	34.8%	844	35.4%	927	35.3%
American Indian Alone	62	2.8%	58	2.4%	55	2.1%
Asian Alone	179	8.0%	224	9.4%	281	10.7%
Pacific Islander Alone	3	0.1%	6	0.3%	8	0.3%
Some Other Race Alone	272	12.2%	331	13.9%	411	15.7%
Two or More Races	124	5.6%	144	6.0%	171	6.5%
Hispanic Origin (Any Race)	540	24.2%	639	26.8%	771	29.4%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.



## Demographic and Income Profile

Stevens Forest  
Area: 0.91 square miles

Prepared by Esri

<b>Summary</b>	<b>Census 2010</b>	<b>2016</b>	<b>2021</b>			
Population	2,808	2,660	2,709			
Households	1,034	971	986			
Families	772	720	729			
Average Household Size	2.70	2.73	2.73			
Owner Occupied Housing Units	801	742	769			
Renter Occupied Housing Units	233	229	216			
Median Age	38.2	39.2	39.8			
<b>Trends: 2016 - 2021 Annual Rate</b>	<b>Area</b>	<b>State</b>	<b>National</b>			
Population	0.37%	0.84%	0.84%			
Households	0.31%	0.75%	0.79%			
Families	0.25%	0.68%	0.72%			
Owner HHs	0.72%	0.77%	0.73%			
Median Household Income	1.11%	1.96%	1.86%			
<b>Households by Income</b>	<b>2016</b>		<b>2021</b>			
	Number	Percent	Number	Percent		
<\$15,000	30	3.1%	32	3.2%		
\$15,000 - \$24,999	66	6.8%	57	5.8%		
\$25,000 - \$34,999	17	1.8%	13	1.3%		
\$35,000 - \$49,999	74	7.6%	56	5.7%		
\$50,000 - \$74,999	100	10.3%	77	7.8%		
\$75,000 - \$99,999	107	11.0%	104	10.5%		
\$100,000 - \$149,999	292	30.1%	330	33.5%		
\$150,000 - \$199,999	141	14.5%	160	16.2%		
\$200,000+	144	14.8%	157	15.9%		
Median Household Income	\$110,435		\$116,706			
Average Household Income	\$126,926		\$137,524			
Per Capita Income	\$46,605		\$50,324			
<b>Population by Age</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	196	7.0%	172	6.5%	172	6.3%
5 - 9	181	6.4%	181	6.8%	175	6.5%
10 - 14	206	7.3%	177	6.7%	187	6.9%
15 - 19	177	6.3%	167	6.3%	156	5.8%
20 - 24	156	5.6%	148	5.6%	144	5.3%
25 - 34	372	13.2%	330	12.4%	339	12.5%
35 - 44	369	13.1%	361	13.6%	383	14.1%
45 - 54	397	14.1%	338	12.7%	330	12.2%
55 - 64	388	13.8%	333	12.5%	324	12.0%
65 - 74	271	9.7%	303	11.4%	291	10.7%
75 - 84	73	2.6%	127	4.8%	177	6.5%
85+	22	0.8%	23	0.9%	33	1.2%
<b>Race and Ethnicity</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,486	52.9%	1,295	48.7%	1,211	44.7%
Black Alone	840	29.9%	826	31.1%	863	31.8%
American Indian Alone	7	0.2%	6	0.2%	6	0.2%
Asian Alone	134	4.8%	157	5.9%	191	7.0%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	198	7.1%	216	8.1%	255	9.4%
Two or More Races	143	5.1%	160	6.0%	184	6.8%
Hispanic Origin (Any Race)	377	13.4%	418	15.7%	492	18.2%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.



## Demographic and Income Profile

Talbot Springs  
Area: 0.52 square miles

Prepared by Esri

<b>Summary</b>	<b>Census 2010</b>	<b>2016</b>	<b>2021</b>			
Population	4,155	4,501	4,876			
Households	1,648	1,769	1,910			
Families	1,006	1,071	1,151			
Average Household Size	2.52	2.54	2.55			
Owner Occupied Housing Units	671	638	673			
Renter Occupied Housing Units	977	1,131	1,237			
Median Age	31.4	32.7	32.9			
<b>Trends: 2016 - 2021 Annual Rate</b>	<b>Area</b>	<b>State</b>	<b>National</b>			
Population	1.61%	0.84%	0.84%			
Households	1.55%	0.75%	0.79%			
Families	1.45%	0.68%	0.72%			
Owner HHs	1.07%	0.77%	0.73%			
Median Household Income	2.63%	1.96%	1.86%			
<b>Households by Income</b>	<b>2016</b>		<b>2021</b>			
	Number	Percent	Number	Percent		
<\$15,000	124	7.0%	171	9.0%		
\$15,000 - \$24,999	49	2.8%	53	2.8%		
\$25,000 - \$34,999	187	10.6%	177	9.3%		
\$35,000 - \$49,999	346	19.6%	332	17.4%		
\$50,000 - \$74,999	306	17.3%	253	13.2%		
\$75,000 - \$99,999	437	24.7%	534	28.0%		
\$100,000 - \$149,999	215	12.2%	261	13.7%		
\$150,000 - \$199,999	86	4.9%	104	5.4%		
\$200,000+	20	1.1%	25	1.3%		
Median Household Income		\$62,319		\$70,966		
Average Household Income		\$69,502		\$73,822		
Per Capita Income		\$27,231		\$28,825		
<b>Population by Age</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	325	7.8%	327	7.3%	360	7.4%
5 - 9	352	8.5%	309	6.9%	317	6.5%
10 - 14	256	6.2%	336	7.5%	298	6.1%
15 - 19	253	6.1%	269	6.0%	318	6.5%
20 - 24	341	8.2%	338	7.5%	366	7.5%
25 - 34	858	20.6%	862	19.2%	973	20.0%
35 - 44	635	15.3%	734	16.3%	766	15.7%
45 - 54	522	12.6%	544	12.1%	574	11.8%
55 - 64	359	8.6%	407	9.0%	447	9.2%
65 - 74	203	4.9%	278	6.2%	288	5.9%
75 - 84	42	1.0%	82	1.8%	148	3.0%
85+	9	0.2%	15	0.3%	20	0.4%
<b>Race and Ethnicity</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,526	36.7%	1,475	32.8%	1,447	29.7%
Black Alone	1,512	36.4%	1,661	36.9%	1,792	36.8%
American Indian Alone	91	2.2%	89	2.0%	86	1.8%
Asian Alone	305	7.3%	391	8.7%	484	9.9%
Pacific Islander Alone	5	0.1%	10	0.2%	13	0.3%
Some Other Race Alone	456	11.0%	571	12.7%	700	14.4%
Two or More Races	260	6.3%	304	6.8%	354	7.3%
Hispanic Origin (Any Race)	970	23.3%	1,174	26.1%	1,400	28.7%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.





## Demographic and Income Profile

Thunder Hill  
Area: 0.56 square miles

Prepared by Esri

Summary	Census 2010	2016	2021			
Population	1,491	1,575	1,677			
Households	544	570	605			
Families	442	460	485			
Average Household Size	2.73	2.75	2.76			
Owner Occupied Housing Units	524	546	579			
Renter Occupied Housing Units	20	24	25			
Median Age	42.3	43.5	45.4			
Trends: 2016 - 2021 Annual Rate	Area	State	National			
Population	1.26%	0.84%	0.84%			
Households	1.20%	0.75%	0.79%			
Families	1.06%	0.68%	0.72%			
Owner HHs	1.18%	0.77%	0.73%			
Median Household Income	1.10%	1.96%	1.86%			
Households by Income	2016		2021			
	Number	Percent	Number	Percent		
<\$15,000	5	0.9%	6	1.0%		
\$15,000 - \$24,999	23	4.0%	23	3.8%		
\$25,000 - \$34,999	16	2.8%	14	2.3%		
\$35,000 - \$49,999	33	5.8%	29	4.8%		
\$50,000 - \$74,999	108	18.9%	81	13.4%		
\$75,000 - \$99,999	62	10.9%	71	11.7%		
\$100,000 - \$149,999	181	31.8%	209	34.5%		
\$150,000 - \$199,999	94	16.5%	113	18.7%		
\$200,000+	49	8.6%	59	9.8%		
Median Household Income	\$106,472		\$112,482			
Average Household Income	\$118,522		\$129,770			
Per Capita Income	\$42,606		\$46,475			
Population by Age	Census 2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	118	7.9%	110	7.0%	105	6.3%
5 - 9	105	7.1%	134	8.5%	132	7.9%
10 - 14	91	6.1%	120	7.6%	150	8.9%
15 - 19	71	4.8%	84	5.3%	104	6.2%
20 - 24	44	3.0%	49	3.1%	49	2.9%
25 - 34	141	9.5%	114	7.2%	91	5.4%
35 - 44	234	15.7%	214	13.6%	197	11.8%
45 - 54	201	13.5%	210	13.3%	254	15.2%
55 - 64	236	15.8%	216	13.7%	203	12.1%
65 - 74	172	11.6%	194	12.3%	219	13.1%
75 - 84	70	4.7%	114	7.2%	136	8.1%
85+	6	0.4%	17	1.1%	36	2.1%
Race and Ethnicity	Census 2010		2016		2021	
	Number	Percent	Number	Percent	Number	Percent
White Alone	1,026	68.8%	1,006	63.9%	996	59.4%
Black Alone	305	20.5%	360	22.9%	415	24.7%
American Indian Alone	2	0.1%	2	0.1%	2	0.1%
Asian Alone	87	5.8%	116	7.4%	152	9.1%
Pacific Islander Alone	0	0.0%	0	0.0%	0	0.0%
Some Other Race Alone	10	0.7%	12	0.8%	15	0.9%
Two or More Races	61	4.1%	78	5.0%	97	5.8%
Hispanic Origin (Any Race)	83	5.6%	107	6.8%	136	8.1%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.



## Demographic and Income Profile

Columbia CDP, MD  
Geography: Place

Prepared by Esri

<b>Summary</b>	<b>Census 2010</b>	<b>2016</b>	<b>2021</b>			
Population	99,615	103,689	109,390			
Households	39,562	40,861	42,938			
Families	26,084	26,599	27,745			
Average Household Size	2.50	2.53	2.54			
Owner Occupied Housing Units	26,153	25,810	27,058			
Renter Occupied Housing Units	13,409	15,051	15,881			
Median Age	37.4	38.6	39.5			
<b>Trends: 2016 - 2021 Annual Rate</b>	<b>Area</b>	<b>State</b>	<b>National</b>			
Population	1.08%	0.84%	0.84%			
Households	1.00%	0.75%	0.79%			
Families	0.85%	0.68%	0.72%			
Owner HHs	0.95%	0.77%	0.73%			
Median Household Income	1.46%	1.96%	1.86%			
<b>Households by Income</b>	<b>2016</b>		<b>2021</b>			
	Number	Percent	Number	Percent		
<\$15,000	2,135	5.2%	2,451	5.7%		
\$15,000 - \$24,999	1,288	3.2%	1,285	3.0%		
\$25,000 - \$34,999	1,825	4.5%	1,628	3.8%		
\$35,000 - \$49,999	2,929	7.2%	2,530	5.9%		
\$50,000 - \$74,999	6,230	15.2%	4,909	11.4%		
\$75,000 - \$99,999	5,730	14.0%	5,947	13.9%		
\$100,000 - \$149,999	9,293	22.7%	10,751	25.0%		
\$150,000 - \$199,999	5,840	14.3%	7,079	16.5%		
\$200,000+	5,591	13.7%	6,358	14.8%		
Median Household Income	\$100,977		\$108,573			
Average Household Income	\$122,599		\$132,796			
Per Capita Income	\$48,465		\$52,266			
<b>Population by Age</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	6,364	6.4%	6,057	5.8%	6,319	5.8%
5 - 9	6,513	6.5%	6,478	6.2%	6,335	5.8%
10 - 14	6,751	6.8%	6,864	6.6%	6,663	6.1%
15 - 19	6,316	6.3%	6,315	6.1%	6,171	5.6%
20 - 24	5,485	5.5%	6,089	5.9%	5,599	5.1%
25 - 34	14,937	15.0%	14,595	14.1%	16,095	14.7%
35 - 44	14,602	14.7%	14,820	14.3%	16,063	14.7%
45 - 54	15,354	15.4%	14,717	14.2%	14,401	13.2%
55 - 64	12,495	12.5%	13,499	13.0%	14,238	13.0%
65 - 74	6,672	6.7%	9,101	8.8%	10,627	9.7%
75 - 84	2,846	2.9%	3,691	3.6%	5,143	4.7%
85+	1,280	1.3%	1,461	1.4%	1,739	1.6%
<b>Race and Ethnicity</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
White Alone	55,322	55.5%	52,175	50.3%	49,903	45.6%
Black Alone	25,231	25.3%	27,802	26.8%	30,485	27.9%
American Indian Alone	393	0.4%	385	0.4%	378	0.3%
Asian Alone	11,390	11.4%	14,569	14.1%	18,163	16.6%
Pacific Islander Alone	44	0.0%	82	0.1%	110	0.1%
Some Other Race Alone	2,811	2.8%	3,396	3.3%	4,104	3.8%
Two or More Races	4,424	4.4%	5,280	5.1%	6,246	5.7%
Hispanic Origin (Any Race)	7,884	7.9%	9,593	9.3%	11,557	10.6%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.



## Demographic and Income Profile

Howard County, MD 2  
Geography: County

Prepared by Esri

<b>Summary</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
Population	287,085		314,633		341,673	
Households	104,749		113,453		122,454	
Families	76,333		82,104		88,268	
Average Household Size	2.72		2.75		2.77	
Owner Occupied Housing Units	77,193		81,274		87,798	
Renter Occupied Housing Units	27,556		32,179		34,656	
Median Age	38.2		39.4		40.4	
<b>Trends: 2016 - 2021 Annual Rate</b>	<b>Area</b>		<b>State</b>		<b>National</b>	
Population	1.66%		0.84%		0.84%	
Households	1.54%		0.75%		0.79%	
Families	1.46%		0.68%		0.72%	
Owner HHs	1.56%		0.77%		0.73%	
Median Household Income	1.63%		1.96%		1.86%	
<b>Households by Income</b>			<b>2016</b>		<b>2021</b>	
			Number	Percent	Number	Percent
<\$15,000			4,233	3.7%	4,985	4.1%
\$15,000 - \$24,999			3,142	2.8%	3,169	2.6%
\$25,000 - \$34,999			4,598	4.1%	4,055	3.3%
\$35,000 - \$49,999			7,255	6.4%	6,477	5.3%
\$50,000 - \$74,999			15,933	14.0%	12,878	10.5%
\$75,000 - \$99,999			14,226	12.5%	15,004	12.3%
\$100,000 - \$149,999			25,133	22.2%	29,115	23.8%
\$150,000 - \$199,999			17,874	15.8%	21,861	17.9%
\$200,000+			21,059	18.6%	24,910	20.3%
Median Household Income			\$110,412		\$119,701	
Average Household Income			\$141,870		\$154,476	
Per Capita Income			\$51,413		\$55,599	
<b>Population by Age</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	17,363	6.0%	17,476	5.6%	18,686	5.5%
5 - 9	20,557	7.2%	20,735	6.6%	20,379	6.0%
10 - 14	22,451	7.8%	23,968	7.6%	23,068	6.8%
15 - 19	20,352	7.1%	21,408	6.8%	21,892	6.4%
20 - 24	14,727	5.1%	17,612	5.6%	16,878	4.9%
25 - 34	35,361	12.3%	38,587	12.3%	44,806	13.1%
35 - 44	42,873	14.9%	42,602	13.5%	46,100	13.5%
45 - 54	49,585	17.3%	50,104	15.9%	49,332	14.4%
55 - 64	34,771	12.1%	42,342	13.5%	48,260	14.1%
65 - 74	17,616	6.1%	25,380	8.1%	32,761	9.6%
75 - 84	8,277	2.9%	10,483	3.3%	14,603	4.3%
85+	3,152	1.1%	3,936	1.3%	4,908	1.4%
<b>Race and Ethnicity</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
White Alone	178,523	62.2%	178,462	56.7%	176,899	51.8%
Black Alone	50,188	17.5%	58,530	18.6%	65,951	19.3%
American Indian Alone	866	0.3%	915	0.3%	941	0.3%
Asian Alone	41,221	14.4%	56,136	17.8%	72,604	21.2%
Pacific Islander Alone	123	0.0%	224	0.1%	303	0.1%
Some Other Race Alone	5,709	2.0%	7,157	2.3%	8,828	2.6%
Two or More Races	10,455	3.6%	13,209	4.2%	16,147	4.7%
Hispanic Origin (Any Race)	16,729	5.8%	21,369	6.8%	26,527	7.8%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.



## Demographic and Income Profile

Maryland  
Geography: State

Prepared by Esri

<b>Summary</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
Population	5,773,552		6,038,125		6,294,916	
Households	2,156,411		2,236,608		2,321,924	
Families	1,447,002		1,490,473		1,542,001	
Average Household Size	2.61		2.64		2.65	
Owner Occupied Housing Units	1,455,775		1,459,188		1,516,372	
Renter Occupied Housing Units	700,636		777,420		805,552	
Median Age	37.8		38.7		39.4	
<b>Trends: 2016 - 2021 Annual Rate</b>	<b>Area</b>		<b>State</b>		<b>National</b>	
Population	0.84%		0.84%		0.84%	
Households	0.75%		0.75%		0.79%	
Families	0.68%		0.68%		0.72%	
Owner HHs	0.77%		0.77%		0.73%	
Median Household Income	1.96%		1.96%		1.86%	
<b>Households by Income</b>	<b>2016</b>				<b>2021</b>	
	Number		Percent		Number	Percent
<\$15,000	184,464		8.2%		215,599	9.3%
\$15,000 - \$24,999	138,443		6.2%		136,718	5.9%
\$25,000 - \$34,999	155,526		7.0%		143,451	6.2%
\$35,000 - \$49,999	245,690		11.0%		238,398	10.3%
\$50,000 - \$74,999	389,338		17.4%		302,155	13.0%
\$75,000 - \$99,999	300,676		13.4%		323,329	13.9%
\$100,000 - \$149,999	407,646		18.2%		467,362	20.1%
\$150,000 - \$199,999	210,379		9.4%		256,125	11.0%
\$200,000+	204,356		9.1%		238,697	10.3%
Median Household Income	\$75,297				\$82,990	
Average Household Income	\$98,571				\$107,246	
Per Capita Income	\$37,037				\$40,061	
<b>Population by Age</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
0 - 4	364,488	6.3%	352,858	5.8%	362,120	5.8%
5 - 9	366,868	6.4%	376,442	6.2%	365,958	5.8%
10 - 14	379,029	6.6%	389,532	6.5%	392,865	6.2%
15 - 19	406,241	7.0%	390,545	6.5%	393,051	6.2%
20 - 24	393,698	6.8%	401,569	6.7%	374,908	6.0%
25 - 34	762,042	13.2%	821,035	13.6%	872,815	13.9%
35 - 44	795,572	13.8%	775,635	12.8%	838,390	13.3%
45 - 54	902,204	15.6%	855,438	14.2%	805,126	12.8%
55 - 64	695,768	12.1%	794,942	13.2%	838,014	13.3%
65 - 74	386,357	6.7%	517,075	8.6%	622,354	9.9%
75 - 84	223,159	3.9%	249,387	4.1%	305,554	4.9%
85+	98,126	1.7%	113,667	1.9%	123,761	2.0%
<b>Race and Ethnicity</b>	<b>Census 2010</b>		<b>2016</b>		<b>2021</b>	
	Number	Percent	Number	Percent	Number	Percent
White Alone	3,359,284	58.2%	3,363,987	55.7%	3,360,425	53.4%
Black Alone	1,700,298	29.4%	1,792,023	29.7%	1,884,771	29.9%
American Indian Alone	20,420	0.4%	22,195	0.4%	24,044	0.4%
Asian Alone	318,853	5.5%	392,733	6.5%	465,312	7.4%
Pacific Islander Alone	3,157	0.1%	3,974	0.1%	4,607	0.1%
Some Other Race Alone	206,832	3.6%	262,978	4.4%	319,013	5.1%
Two or More Races	164,708	2.9%	200,235	3.3%	236,744	3.8%
Hispanic Origin (Any Race)	470,632	8.2%	605,753	10.0%	745,066	11.8%

**Data Note:** Income is expressed in current dollars.

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021.

## **APPENDIX D**

### ***Retail Supply Inventory***

### OMVC Supermarket Competition

<b>Retail Center</b>	<b>Location</b>	<b>Store</b>	<b>Distance (1)</b>	
			<b>Minutes</b>	<b>Miles</b>
<b>Long Reach Village Center</b> 8775 Cloudleap Court	Columbia	Vacant	N/A	N/A
<b>Dorsey's Search Village Center</b> 4715 Dorsey Hall Road	Columbia	Giant	5.0	2.3
<b>Owen Brown Village Center</b> 7100 Cradlerock Way	Columbia	Giant	6.0	2.6
<b>Former Rouse Headquarters</b> 10275 Little Patuxent Parkway	Columbia	Whole Foods	6.0	3.1
<b>Columbia Palace</b> 8805 Centre Park Drive	Columbia	Giant	9.0	3.2
<b>Wilde Lake Village Center</b> 10451 Twin Rivers Road	Columbia	David's Natural Market	8.0	3.3
<b>Dobbin Center</b> Dobbin Road @ Route 175	Columbia	Wal*Mart (2) (Not a Super Center)	6.0	3.4
<b>Columbia Crossing</b> 6161 Columbia Crossing Drive	Columbia	Target	8.0	3.6
<b>King's Contrivance Village Center</b> 8600 Guilford Road	Columbia	Harris Teeter	8.0	3.9
<b>Hickory Ridge Village Center</b> 6410-30 Freetown Road	Columbia	Giant	9.0	4.1
<b>8855 McGaw Road</b> 8855 McGaw Road	Columbia	Wegmans	7.0	4.2
<b>Snowden Square</b> 9011 Snowden River Parkway	Columbia	BJ's Wholesale Club	8.0	4.2
<b>6551 Waterloo Road</b> 6551 Waterloo Road	Elkridge	Weis Markets	8.0	4.7
<b>Gateway Overlook</b> 6675 Marie Curie Drive	Elkridge	Costco	9.0	4.9
<b>Gateway Overlook</b> 6610 Marie Curie Drive	Elkridge	Trader Joe's	9.0	5.0
<b>Harper's Choice Village Center</b> 5485 Harpers Farm Road	Columbia	Safeway	11.0	5.0

(1) Drive times and distances are from MapQuest.

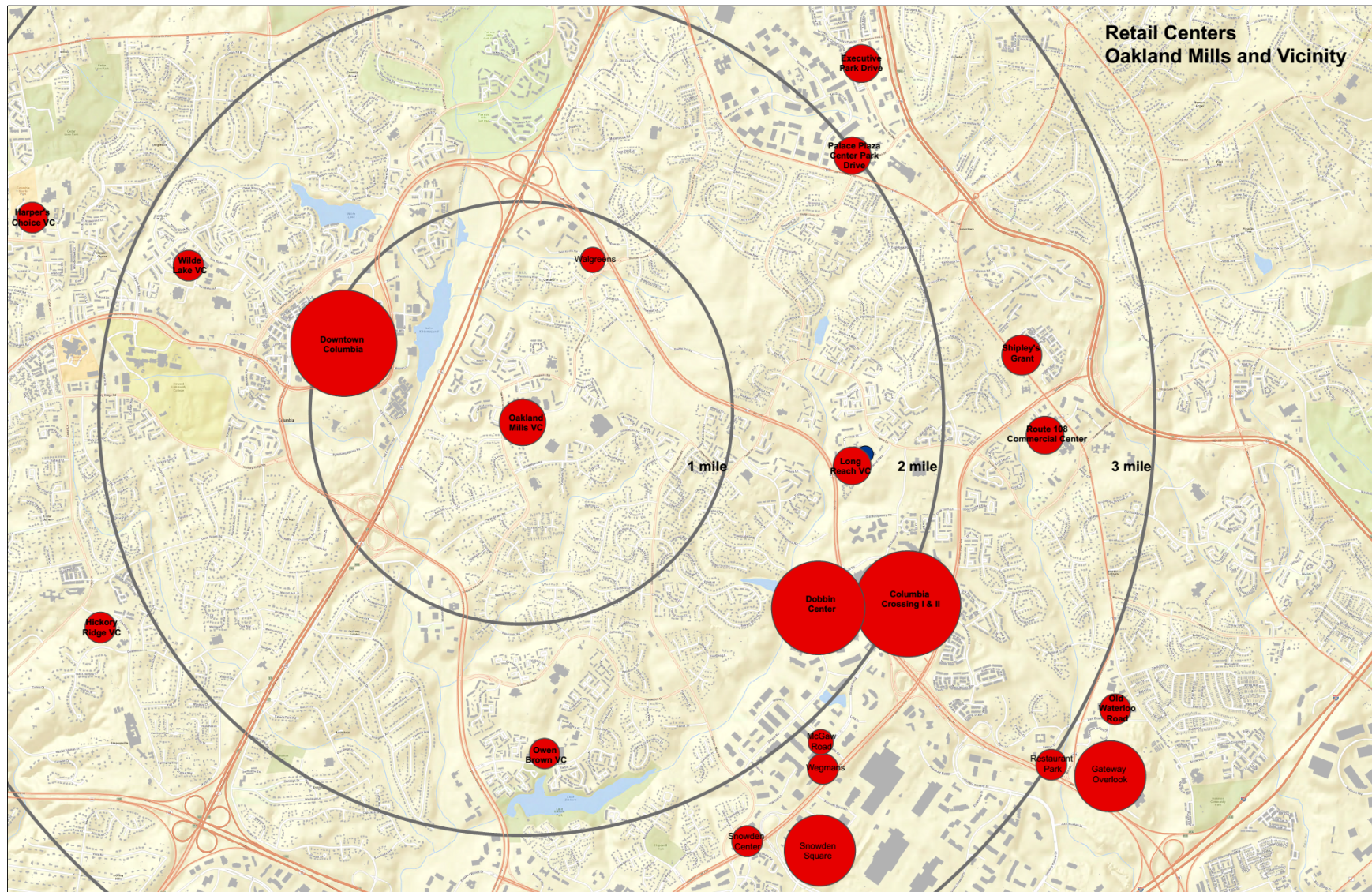
(2) Wal\*Mart does not include a full-sized supermarket but does sell many grocery items.

**Source: RDS; Folan Consulting, Bolan Smart, September 2016**

OMVC Representative Competitive Retail Centers

<b>Competitive Retail Centers</b>	<b>Size (SF) &amp; % Leased</b>	<b>Properties &amp; Year Built</b>	<b>Average Rents</b>	<b>Major Tenants</b>	<b>Other</b>
<b>Dobbin Center</b> 6435 Dobbin Road Columbia Manager: Rosenthal Properties	295,159 96%	12 1982	\$ 39.00	Wal*Mart, Ross Dress for Less, Offenbachers, Haverly's	Six non-owned outparcels include: bank, McDonald's, Chik-fil-A, Wendy's Starbucks
<b>Columbia Crossing I &amp; II</b> Dobbin Rd & Rte. 175 Columbia Manager: Kimco Realty Corp. (majority of center)	495,953 100%	16 1996/1997	\$ 28.00	Big Lots, Nordstrom Rack, Books-A-Million, Dick's Sporting Goods, TJ Maxx, Staples, Jo-Ann Fabrics, Old Navy, Target, REI, Toys R Us, Babies R Us	Restaurant cluster includes La Madeleine, Famous Dave's Ribs, Don Pablo's, Macaroni Grill
<b>Gateway Overlook</b> Off I-95 at Rte. 175 & Rte. 108 Columbia Manager: Washington Real Estate Investment Trust (214,281 SF) & General Growth Properties	528,350 99%	9 2007	\$ 23.00	Costco, Lowe's, Trader Joe's, Best Buy, Office Depot, Golf Galaxy	Restaurants include: Houlihan's, Mimi's Café. Paragon at Gateway Overlook (340 apartments)
<b>Snowden Square</b> Snowden River Pkwy & Robert Fulton Columbia Manager: Manekin LLC	500,000 100%	17 1993	\$ 28.00	United Artists 14 Theaters, Bed Bath & Beyond, Marshalls, BJ's, Michael's, Home Depot, PetSmart	Built to complement the 295,200 SF Dobbin Center
<b>Dobbin Station</b> 6781 Dobbin Road Columbia	N/A 100%	4 N/A	N/A	Petco, LaZBoy	Food service tenants include: Chipotle, Noodles and Company
<b>Columbia Mall</b> 10300 Little Patuxent Parkway Columbia Manager: General Growth Properties	1,390,000 N/A	1 1971	N/A	Lord & Taylor, Macy's, Nordstrom, Sears, AMC Theaters, JC Penney	Expansion added 40,000 SF; Restaurant cluster includes: Cheesecake Factory, PF Chang's, Uno Chicago Grill, Champs Americana
<b>Long Gate Shopping Center</b> 4310 Montgomery Road Ellicott City Manager: Kimco Realty Corp.	595,410 100%	11 1996/1997	N/A	Target, Safeway, Kohl's, Barnes & Noble, Michaels	Originally developed by Opus

Source: Various centers; CoStar, Inc.; RDS; Folan Consulting, Bolan Smart, September 2016



Source: Howard County Department of Planning and Zoning, 2016



Competitive Profile of Columbia Village Centers

Village Center	Competitive Supermks & Size (In SF)	Non-Trad'l Grocers W/1 5-6 Minute Drive	Potential Res'l Market Growth	Competitive Environment	Visibility & Access Ratings	Average Daily Traffic (2012)	Population Density - 2012		Med HH Income 5-Min Drive	Notes
							5-Min Drive	10-Min Drive		
Dorsey's Search (Kimco Realty Corp.)	2: Giant (Columbia Palace): 56,000 SF; Whole Foods: 45,000 SF	None	Limited in 5-minute drive-time, plus growth in Downtown Columbia & planned units in Ellicott City	Limited	Moderate: near intersection of Rte 29 & Rte 108; direct access from Dorsey Hall Rd, Old Annapolis Rd.	Old Annapolis Rd: 9,422; Columbia Rd near Old Annapolis Rd: 23,850	8,865	124,909	\$ 101,059	Relatively affluent, well leased, minimal competition
Harper's Choice (Kimco Realty Corp.)	3: Giant (Hickory Ridge): 58,000 SF; Whole Foods: 45,000 SF; Roots Market (Clarksville Square)	None	Strong in 5-minute drive-time due to growth in Downtown Columbia; impacts unknown	Limited	Poor to Moderate: direct access to Harper's Farm Rd, which connects to Rte 108 (approximately 1-mile)	Harper's Farm Rd: 11,431	24,290	82,055	\$ 92,533	High, close-in density
Hickory Ridge (Kimco Realty Corp.)	4: Whole Foods: 45,000 SF; Safeway (Harper's Choice); Harris Teeter (Kings Contrivance); David's Natural Market (Wilde Lake)	None	Moderate in 5-minute drive-time, plus growth in Downtown Columbia	Moderate	Poor to Moderate: direct access off Freetown Road, connects to Cedar Lane & to Rte 32 to the south	Freetown Rd: 5,061; Cedar Lane: 21,960	18,993	93,887	\$ 102,053	Proximity to new development in Town Center
Kings Contrivance (Kimco Realty Corp.)	2: Giant (Owen Brown); Giant (Hickory Ridge): 58,000 SF	None	Moderate in 5-minute drive-time, plus in-fill housing growth along Rtes 29 & 216	Limited	Poor to Moderate: Guilford Rd connects to Broken Land Pkwy & Rte 32	Guilford Rd: 7,620	15,365	148,272	\$ 99,180	Safeway lease not renewed in 2005; leased to Harris Teeter with newly-built store; well-leased
Long Reach (Howard County)	5: Giant (Columbia Palace): 56,000 SF; Giant (Lynwood Sq.); Wegmans: 135,000 SF; Weis; Trader Joe's	4: Wal*Mart, BJ's, Costco & Target	Moderate in 5-minute drive-time	High	Poor to Moderate: major access off Tamar Drive, proximate to Snowden River Pkwy, Rte 175	Tamar Drive @ Rte 175: 12,081	17,061	107,005	\$ 82,417	Lost supermarket anchor
Owen Brown (Fleur Associates LLC)	4: Weis (Oakland Mills); Harris Teeter (Kings Contrivance); Wegmans: 135,000 SF; Whole Foods: 45,000 SF	1: BJ's	Strong in 5-minute drive-time due to growth in Downtown Columbia; potential growth on Route 1 Corridor	Moderate	Poor to Moderate: access to Cradlerock Way, which connects to Broken Land Pkwy; access limited across Route 29	Broken Land Pkwy @ Cradlerock Way: 31,120	17,356	138,696	\$ 88,292	Long-term impacts of Wegman's; proximity to commercial centers along Snowden River Parkway
Oakland Mills (Cedar Realty Trust, Inc.)	3: Giant (Dorsey's Search); Giant (Owen Brown); Whole Foods: 45,000 SF	1: Wal*Mart	Limited in 5-minute drive-time, plus growth in Downtown Columbia	Moderate	Poor to Moderate: access to Stevens Forest Rd, which connects to Broken Land Pkwy; access limited across Route 29	Stevens Forest Rd: 11,821	6,989	94,525	\$ 73,246	Two prior supermarket operators closed at this location
River Hill (Kimco Realty Corp.)	1: Roots Market (Clarksville Square)	None	Limited in 5-minute drive time; some new, low-density housing expected	Limited	Good: borders Rte 108	Rte 108: 19,220	5,252	66,628	\$ 170,708	County's largest Giant (63,000 SF); borders non-New Town zoned land; highest income levels; best visibility; typically well leased

Source: Retail Development Strategies; Folan Consulting; WTL+a, Bolan Smart, September 2016

## **APPENDIX E**

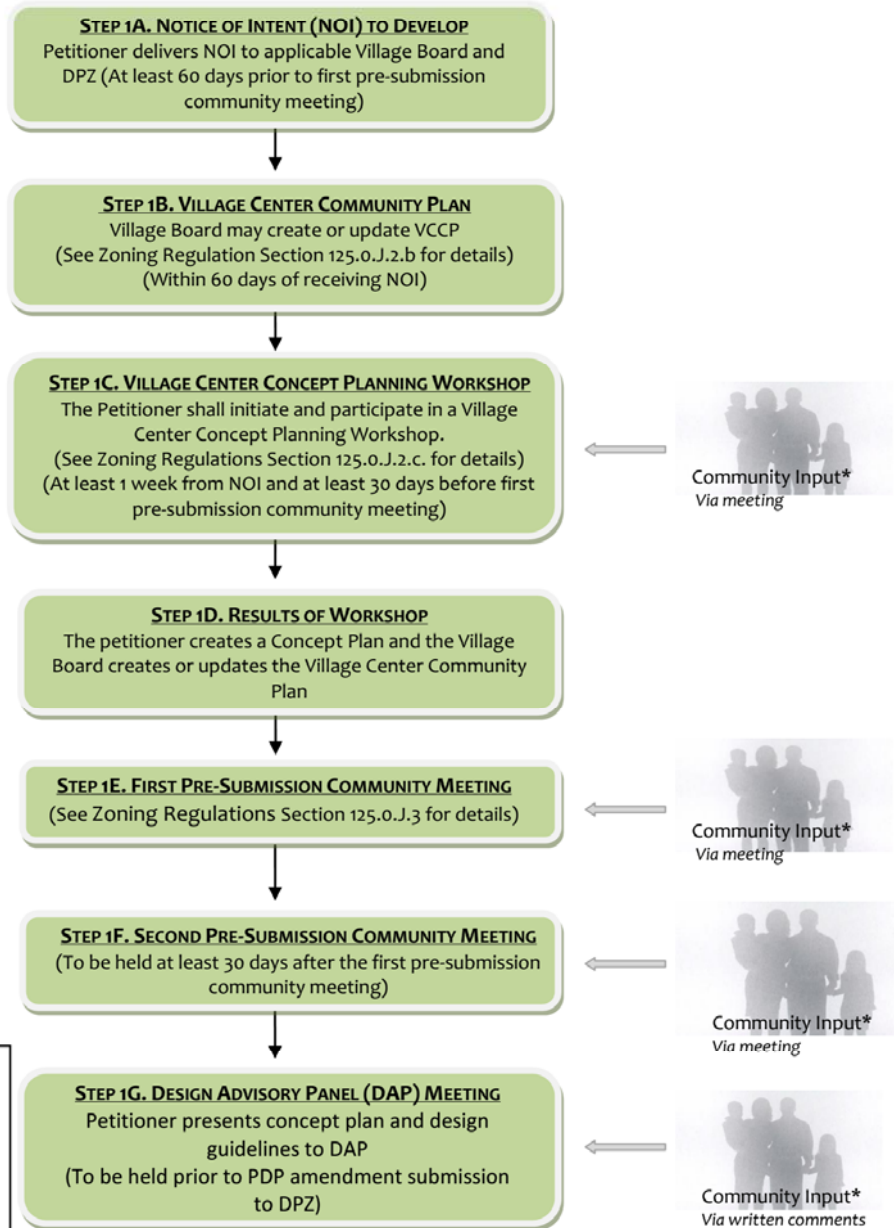
### ***Major Village Center Redevelopment Process Flow Chart***

## MAJOR VILLAGE CENTER REDEVELOPMENT PROCESS

Council Bill No. 29-2009 (ZRA-102) Effective 11/5/09

### STEP 1 – VILLAGE CENTER COMMUNITY PLANNING PROCESS

(See Zoning Regulation Section 125.0.J.2 for Details)



Disclaimer: All content contained within this chart is for informational purposes. All projects will be reviewed by this Department on a case-by-case basis. Please refer to Section 125.0 of the Zoning Regulations for more detailed information concerning requirements for Major Village Center redevelopment.

\* Community input is welcomed at any time; points indicated are the most opportune times.

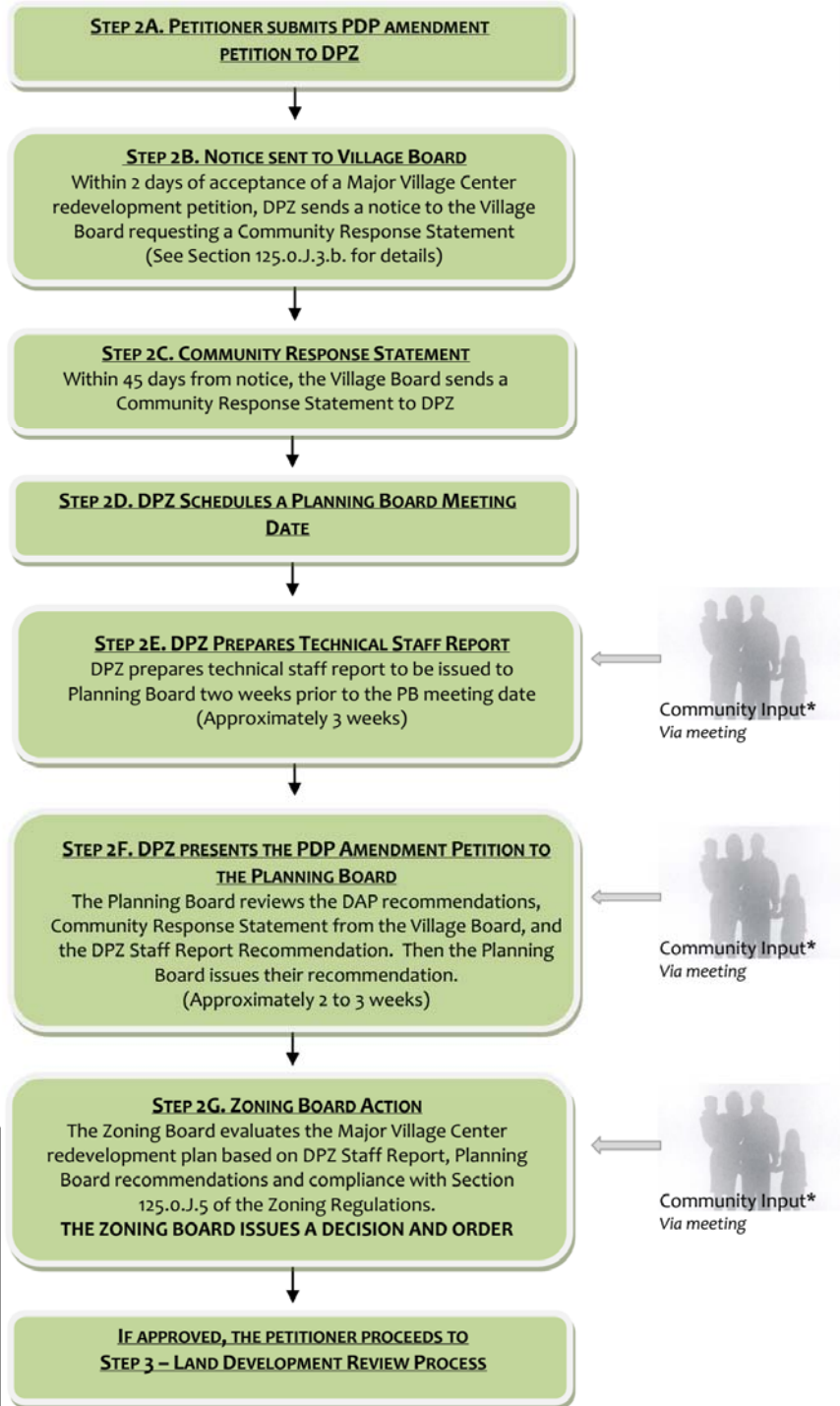
June, 2014

## MAJOR VILLAGE CENTER REDEVELOPMENT PROCESS

Council Bill No. 29-2009 (ZRA-102) Effective 11/05/09

### STEP 2 - ZONING PROCESS TO AMEND PRELIMINARY DEVELOPMENT PLAN (PDP)

(See Zoning Regulation Section 125.0.J.3, 4 and 5 for Details)



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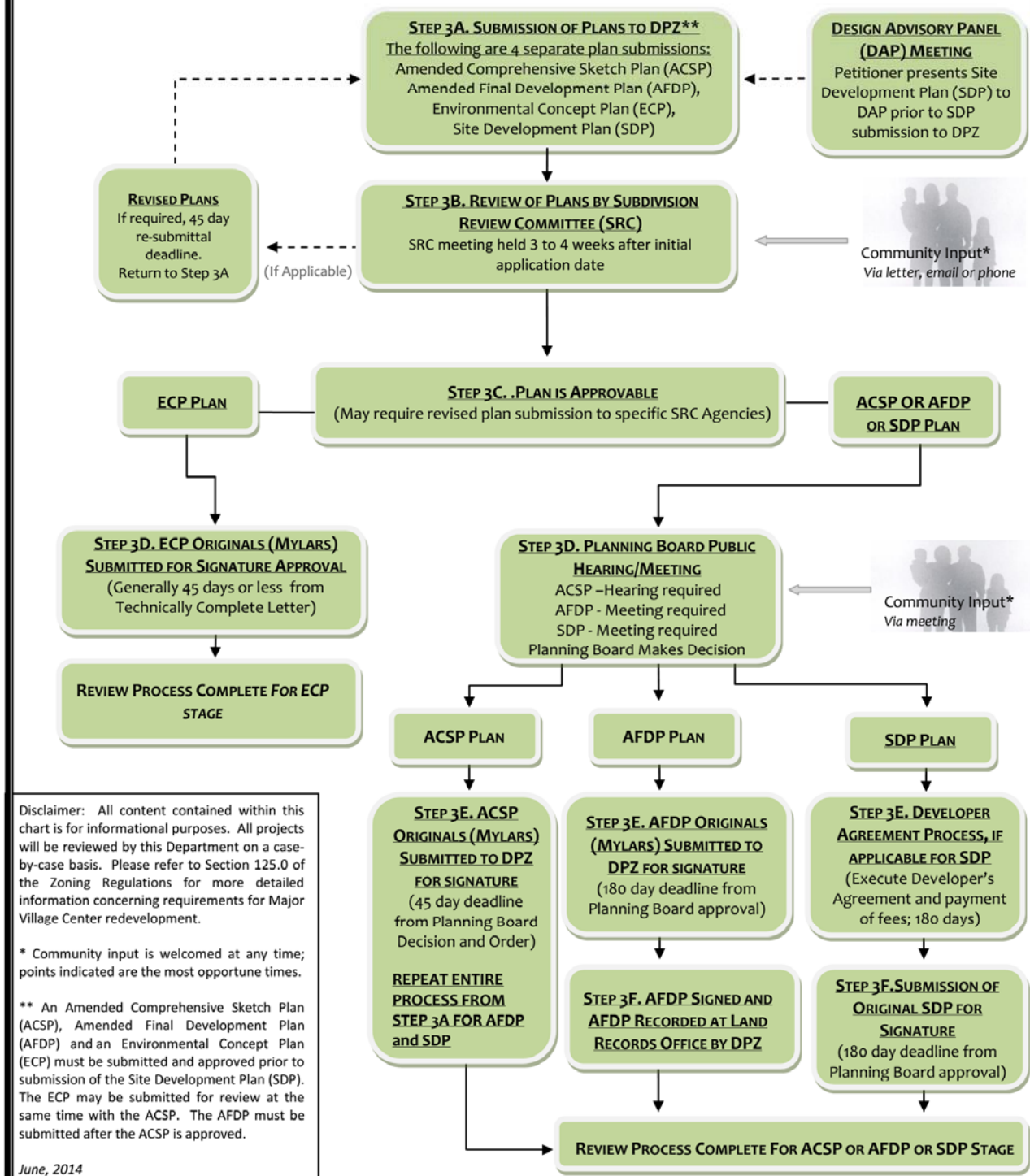
\* Community input is welcomed at any time; points indicated are the most opportune times.

June, 2014

## MAJOR VILLAGE CENTER REDEVELOPMENT PROCESS

Council Bill No. 29-2009 (ZRA-102) Effective 11/05/09

### STEP 3 - LAND DEVELOPMENT REVIEW PROCESS (See Zoning Regulation Section 125.0.C., D. and G. for Details)



Disclaimer: All content contained within this chart is for informational purposes. All projects will be reviewed by this Department on a case-by-case basis. Please refer to Section 125.0 of the Zoning Regulations for more detailed information concerning requirements for Major Village Center redevelopment.

\* Community input is welcomed at any time; points indicated are the most opportune times.

\*\* An Amended Comprehensive Sketch Plan (ACSP), Amended Final Development Plan (AFDP) and an Environmental Concept Plan (ECP) must be submitted and approved prior to submission of the Site Development Plan (SDP). The ECP may be submitted for review at the same time with the ACSP. The AFDP must be submitted after the ACSP is approved.

June, 2014