

2011 STRATEGIC PLAN



HOWARD
COUNTY
MARYLAND

Economic Development Authority

Vision

(Economic development vision for Howard County) Howard County, Maryland will be widely recognized as the best place in the U.S. to live, work and operate a business.

Who We Are

Howard County, Maryland is a dynamic, diverse, vibrant, culturally enriched and globally competitive community, in perpetual renewal, fueled by education, innovation and involvement and strengthened by high quality of life and economic vitality.

Mission of the Howard County Economic Development Authority (Authority)

The mission of the Authority is to generate higher-paying jobs and a growing commercial tax base in the County through business development, resulting in a strong economic base and high quality of life.

How We Do It

To achieve its mission, the Howard County EDA will focus on four key areas:

- Marketing: to drive business retention, expansion and attraction success
- Promoting and Supporting: entrepreneurship and small business growth
- Advocating: policies to ensure an ever improving business climate
- Promoting Awareness: of critical economic development issues and priorities within the community, including business, government, not-for-profit, education partners, and local residents.

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February 2011



The Honorable Ken Ulman
Howard County Executive
George Howard Building
3430 Court House Drive
Ellicott City, Maryland 21043

Dear Mr. Ulman:

We are pleased to present the 2011 Strategic Economic Development Plan for Howard County. This Plan was developed by the Strategic Plan Committee comprised of representatives from local, regional and state government agencies, the private sector, education and community organizations. We were extremely pleased that you took the time to personally participate in the process. The planning process determined that Howard County remains highly competitive when compared to the nation's largest and most vibrant counties. The process also clarified the county's greatest opportunities and challenges and outlined themes to drive the community towards achieving its economic and quality of life goals.

The 2011 Plan utilizes a fresh approach to economic development that requires an even bolder vision for growth and economic vibrancy. The unprecedented opportunity presented by military base realignment and the new Cyber Command will generate impressive opportunities in the Baltimore-Washington Corridor. The birth of a new cyber industry, and the evolution of the world's largest concentration of information assurance, data system security and cyber warfare will be "game changers" for the market.

The 2011 Strategic Plan identifies four themes designed to drive the community towards achieving its economic and quality of life goals, and ultimately, its vision: Knowledge Community, Connected Community, Reinvent the Community, and Innovation Community. The Authority's Board of Directors will conduct an annual review on the five major issues identified in this plan: Fort Meade Growth, Downtown Columbia Revitalization, Redevelopment Approach to Existing Business Parks, Branding Howard County as a Top Global Technology Center, and Efficient Local and Regional Transportation.

Under your leadership, Howard County has achieved an enviable balance between our economy and our quality of life. We look forward to continuing our partnership with you, guided by your vision and this new Strategic Plan.

Sincerely,

A handwritten signature in black ink, appearing to read "Peter J. Rogers, Jr.".

Peter J. Rogers, Jr.
Chair, Board of Directors

A handwritten signature in black ink, appearing to read "Catherine M. Ward".

Catherine M. Ward
Chair, Strategic Plan Committee

2011 Strategic Plan Committee

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South Manor Farm

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Executive Summary

A bold, 1960s vision for a ‘planned new town’ (Columbia) between the Washington and Baltimore regions helped propel Howard County to its current position as a thriving community at the center of the nation’s 4th largest metro area. Howard County’s highly educated and diverse population, top performing public schools, growing business base and strategic location have helped it to become a highly desirable place to live and one of the more successful local economies in the nation.

This strategic plan makes the assertion that in 2011 Howard County has reached the next pivotal point in its history, calling for a fresh approach to economic development that requires an even bolder vision and new ways of thinking and operating as it relates to growth. The unprecedented opportunity presented by military base realignment and the new Cyber Command will generate rapid economic growth in the Baltimore-Washington Corridor. The birth and evolution of the world’s largest concentration of information assurance, data system security and cyber warfare will be “game changers” for the market.

These forces, coupled with the already strong base of professional, scientific and technical employment, have the potential to position Howard County as one of the world’s top research and technology centers. However, 20th Century development guidelines, outdated town centers, and resource and infrastructure constraints limit the County’s ability to take full advantage of future growth opportunities. If it is to become a known and respected peer to top tech markets, in both economic opportunity and quality of life, Howard County must re-imagine and reinvent how it will promote and manage desired growth and leverage ‘creative class’ concepts.

There are three overarching objectives of this strategic plan and these are woven throughout the strategies and themes in the document. The first is that the County must fully embrace the concept of sustainability. Sustainability requires managing future growth in ways that ensure the economy continues to prosper without compromising the society and natural environment that we cherish and depend on. A second objective is to promote inclusion of core recommendations in the upcoming Howard County General Plan. This will best ensure that appropriate direction and guidelines are adopted by the County and its agencies in a tangible way. A third objective is to establish an economic development culture within Howard County that is nimble and poised to adapt to an ever changing global environment. Strategic plans are written based on today’s information and future projections; however, experience has taught us to also be prepared to readily respond to the unexpected.

Vision

Howard County, Maryland will be widely recognized as the best place in the United States to live, work and operate a business.

Top Priorities

There are five top economic development drivers or priorities highlighted in this strategic plan that will best support attainment of the vision. They are:

- ***Capture Fort Meade Growth:*** Total direct, indirect and induced employment related to Fort Meade is projected to grow from 134,000 to 195,695 over the next several years due to BRAC, Cyber Command, NSA and other planned expansions. Most of these will be in high pay, high skill positions. This will have a profound impact on Howard County in terms of new and expanding IT and government contractors, an increasing residential population and spin-off development.
- ***Revitalize Downtown Columbia:*** The effort to turn Downtown Columbia into a vibrant, mixed-use urban center is critical to Howard County's economic future and is strongly endorsed by this plan. Embracing the concepts of new urbanism, this modern downtown will incorporate sustainable development, environmental restoration, arts and culture, affordable housing, pedestrian and bicycle connectivity, new amenity areas, transit, and a renovated Merriweather Post Pavilion – in a carefully phased development plan consisting of 1,250,000 square feet of retail, 4,300,000 square feet of office, 5,500 residential units, and 640 hotel rooms. This walkable, livable, revitalized downtown will create a needed urban anchor that will attract and retain the creative class, while remaining attractive to Columbia's mature, more affluent citizens, and will advance the rebranding of Howard County for the 21st Century.
- ***Renew Approach to Existing Business Parks:*** As the availability of Greenfields for new development in Howard County decreases, and the demand for companies to locate and expand in the Baltimore-Washington Corridor increases, the County must devise new, more sustainable ways to accommodate business growth. This plan strongly endorses new guidelines in the General Plan and zoning statutes that would promote and support redevelopment of existing low-rise and outdated properties into new, taller structures in designated employment centers and business parks.
- ***Embrace Efficient Local and Regional Transportation:*** To ensure an adequate workforce for Howard County employers, and to maintain quality of life, developing creative solutions to local and regional transportation issues must become a top priority. Traffic to Fort Meade alone is projected to grow from 34,000 cars per day to 62,000, adding 20 to 45 minutes to average commutes. Commuter rail, rapid bus, and road improvements must be part of a comprehensive local and regional network.
- ***Brand Howard County as a Top Global Tech Center:*** Howard County and Central Maryland are rich with the innovation and quality of life assets found in the nation's best-known tech centers, such as Austin, Research Triangle Park and Silicon Valley. This plan calls for the development and implementation of a comprehensive branding effort for Howard County to establish a distinct and readily identifiable research and technology brand in the global marketplace.

Themes

Successful economic development efforts require continuous improvement in a wide variety of factors that impact quality of life and the economy. While a strong focus on the top priorities is essential to realizing the vision, the strategic plan also stresses the need to pursue efforts related to many other factors – most of which are not under the ‘control’ of the Howard County Economic Development Authority.

The 2011 Strategic Plan identifies four themes designed to work interactively to drive the community towards achieving its economic and quality of life goals, and ultimately, its vision. Each priority or strategy, including the top priorities listed above, is associated with one of the themes. For this strategic plan to be successful, key local and regional partners must work together toward common goals and progress in each tactic must be monitored on a regular basis using agreed-upon measures.

1. Knowledge Community

This theme focuses on the importance of a highly educated population and excellent education resources to the County’s economic and quality of life success. Howard County ranks among the top 10 counties in the U.S. for education attainment at the high school, college and advanced degree levels. Its high performing school system serves as a primary factor in the attraction of new residents from around the nation and world. However, dramatic shifts taking place in the global economy require a renewed and continuous focus on education. The type of jobs being created in the region will require increasing numbers of highly educated, high-skilled workers. The top priorities for the knowledge theme are development of a comprehensive workforce strategy, P-20 education, and lifelong learning.

2. Connected Community

The Connected Community theme is designed to highlight, promote and improve access to regional, national and global markets and to emphasize the importance of local and regional partnership among government, business, education, and not-for-profit entities. The most critical components of this theme are Fort Meade growth, the most comprehensive public and private broadband networks, efficient local and regional transportation, and strategic alliances and partnerships. This theme also stresses the importance of including key recommendations from the Strategic Plan in the County’s upcoming General Plan and in plans of other agencies/organizations to better ensure partnership, implementation and realization of this plan’s vision for Howard County.

3. Reinvent the Community

This theme focuses on preserving the key characteristics and qualities highly valued in the community, while devising new ways to accommodate healthy and necessary growth in Howard County. The County must embrace the concept of reinventing its employment zones if it is to evolve from an industrial based community to a knowledge based, technological and sustainable community. If it is to realize its economic development vision, Howard County must continuously adapt to the trends and preferences of each new generation of companies and people, and to internal constraints, such as limited undeveloped land. The components of this theme are: Downtown Columbia revitalization; a redevelopment approach to existing employment centers and business parks; creating great, diverse, unique, new and renewed communities; ensure adequate natural resources, and developing the tools to make these priorities a reality.

4. Innovation Community

The Innovation theme stresses the importance of entrepreneurship; new product and technology development; problem-solving; information sharing; the attraction of young, upwardly mobile professionals; and creating a culture of innovation. New products and small businesses are increasingly important to long-term job creation, community wealth and economic opportunity. This theme focuses on the branding of Howard County as a global tech center; establishing a geographically defined research park; integrating innovation assets; cultivating an entrepreneurial climate; green development and technologies, and promoting innovation through quality communities.

Strategic Plan 2011

Howard County is one of the nation's top performing local economies and receives consistently high praise from residents and publications for its livability. The County's strong performance in a wide variety of factors related to the economy and quality of life provide strong testimony for the lofty vision developed for it in the 1970s and for the people and organizations that have worked so hard together to make that vision a reality.

This strategic plan contends that in 2011 the County has reached the next pivotal point in its history. Unique, perhaps once in a lifetime, opportunities being presented by military base realignment, Cyber Command and the NSA could position Howard County as a top global technology hub.

However, to take full advantage of these opportunities, and at the same time maintain and preserve the highly-valued characteristics of the community, Howard County must re-imagine and reinvent its approach to growth. It must begin to wean itself from total dependence on Greenfield growth and eliminate the term 'built out' from the local development and zoning lexicon. The County must instead promote and support efforts to redevelop existing and more mature office parks, town centers, and thoroughfares into vibrant, mixed-use communities more suitable to the 21st Century marketplace.

Vision (Economic development vision for Howard County)

Howard County, Maryland will be widely recognized as the best place in the U.S. to live, work and operate a business.

This strategic plan outlines five top priorities for the County in pursuit of the economic development vision. Each of these priorities is discussed in more detail in the 'themes' section below:

1. Brand Howard County as a Global Tech Center
2. Capture Fort Meade Growth
3. Revitalize Downtown Columbia
4. Renew Approach to Business Parks
5. Embrace Efficient Local and Regional Transportation

Themes

Successful economic development efforts require continuous improvement in a wide variety of factors that impact quality of life and the economy. While a strong focus on the top priorities is essential to realizing the vision, this strategic plan also stresses the need to pursue efforts related to many other factors – most of which are not under the 'control' of the Howard County Economic Development Authority.

The 2011 Strategic Plan identifies four themes designed to drive the community towards achieving its economic and quality of life goals, and ultimately, its vision. Each priority or strategy, including the top priorities listed above, is associated with one of the themes. The themes are designed to work together to best support an improved economy and quality of life. The diagram below illustrates this graphically.



At the core of the wheel is the Howard County community. The four themes - Knowledge, Connected, Reinvent and Innovation - act as the “spokes” of the wheel and together provide the greatest assurance that economic growth and quality of life goals will be attained and kept in balance.

The remainder of the strategic plan outlines the key components of each theme: 1) Knowledge, 2) Connected, 3) Reinvent, and 4) Innovation.

1. Knowledge Community

Howard County is one of the most highly educated communities in the nation. With 59.6% of residents age 25+ holding a bachelors degree or higher, the County ranks 1st among all local and national benchmark counties; it ranks 2nd in the U.S. for those holding masters degrees or higher, at 28.5%. The County develops its own talent through top performing public schools and attracts knowledge workers due to its exceptional economic and quality of life opportunities. This knowledge base supports a healthy local economy by stimulating growth and attraction of innovative firms, high wage earning residents and spin-off support industries.

Howard County is also part of the broader Greater Washington-Baltimore Region, which is the most highly educated metropolitan area in the nation. This region boasts over 200,000 college and university students and attracts more federal R&D funding to its universities than any metro area in the United States.

The current workforce is regarded by local firms as being one of the best in the nation (and this is supported by the data), particularly for knowledge-based industries; however, this strategic plan raises a number of concerns related to projected needs in the near- and long-terms. If Howard County is to maintain and build on its current position as a top performing place, and meet projected demands related to Fort Meade expansion and other tech-related growth, it must place heightened and continuous emphasis on the workforce. A shift in thinking related to education is needed to adapt to the changing realities of the global marketplace.

The most critical components of the knowledge community theme are:

A. Workforce Development Strategy

Howard County must create a workforce development strategy that takes into account and addresses the concerns highlighted in the Benchmarking Assessment. The workforce strategy should cover needs/issues related to Fort Meade growth; P-20 education; commuting and public transportation; housing for all; redevelopment of urban centers; attraction/retention of service, entry-level, and young adult workers; STEM (science, technology, engineering and math); health care and benefits costs; and lifelong learning. A vital component of this effort is determining which groups will produce the report, implement strategies and track progress.

B. P-20 Education

To best ensure the County maintains its competitive advantage in education effectiveness and attainment, and to meet projected employment demand, this strategic plan expands the focus of core education from K-12 (kindergarten to high school) to P-20 (pre-school through college). An increasing focus on STEM and benchmarking against international education standards is also critical to meeting long-term workforce needs and to being globally competitive. Higher education institutions, within Howard County and throughout the region, should be leveraged to further promote innovation and to prepare students for growing occupations. These efforts will best prepare students for the increasingly complex and global economy and better position Howard County to fill existing needs and attract new businesses and jobs from around the nation and world.

This type of focus will require increasing public-private partnership among business, government and education leaders to develop standards and establish programs. It will also require cooperation and involvement of all education entities, including the public school system, private schools, community colleges, colleges and universities, online training and other providers of learning.

Access to high quality schooling options is one of Howard County's greatest draws, making a critical contribution to high quality of life and the local workforce. The County's public school system is consistently ranked the best in Maryland and among the finest in the nation. This helps to attract an increasing number of relocating domestic and foreign families who often target Howard County based on performance and reputation of the public schools. County residents also have access to excellent private schools throughout Central Maryland.

There are also over 5,000 full-time equivalent students at Howard County higher education institutions, including Howard Community College, Johns Hopkins University (including graduate programs, the Whiting School of

Engineering, and the Applied Physics Laboratory), Loyola University, University of Maryland University College, and the University of Phoenix. These institutions provide high quality education options for residents of the County and ongoing training for current employees of local businesses.

C. Lifelong Learning

This strategic plan calls on the County to promote and support lifelong learning that will enable residents to make job and career changes when necessary or desired. This includes options related community colleges, local facilities of regional colleges, for profit colleges and training programs, and online education.

The world is changing fast. The current economic downturn and stubbornly high national unemployment rates provide pertinent examples of why people must be prepared for uncertainty and new opportunities as it relates to their jobs, careers and occupational demand. The strategic plan argues that in the coming years this challenge is likely to be even greater. Today's workforce requires workers to be increasingly flexible and adaptive in relation to their careers. New technologies and productivity enhancements often result in the decline in certain jobs (particularly lower skilled positions) and a rise in others (usually higher skilled positions).

2. Connected Community

The Connected Community theme is designed to promote and improve:

- ***Access:*** Ensures that Howard County provides its citizens and businesses with ready access to regional, national and global markets through transportation, technology and support networks.
- ***Internal Partnership:*** Emphasizes the importance of partnership among business, government, education and not-for-profit entities and leaders in Howard County. New ways must be explored to expand cooperation between and among all community entities.
- ***Regional Partnership:*** Recognizes that Howard County is not a stand-alone island but is a centrally located and critical part of the Washington-Baltimore Region.
- ***Assimilation:*** Supports the transition for newcomers to Howard County from around the nation and world.

The most important components of the Connected Community theme are:

A. Fort Meade Growth

This strategic plan calls for an increasing focus in two key areas related to Fort Meade growth:

1. Leveraging Howard County opportunities related to on-base jobs and the attraction and expansion of government contractors that are drawn to the region to be near their Fort Meade-based federal clients.
2. Ensuring the appropriate investment in transportation infrastructure to manage expected traffic growth and to minimize congestion and commute times.

Fort Meade, although located in neighboring Anne Arundel County, is Howard County's largest economic growth engine. It currently employs over 40,000 workers (8,000 of these residing in Howard County) at its on-base operations in 68 defense-related agencies, including the National Security Agency (NSA) and the Department of Defense (DoD). Fort Meade also supports thousands of additional jobs with IT and government contractors who are located in the Corridor to serve the critical needs of on-base agencies.

While growth related to Fort Meade is often described as 'BRAC', there are actually 5 major components to this Army installation's growth. They are NSA, Cyber Command, BRAC, Enhanced Use Lease (EUL) and 'other' growth. Total additional new jobs on Fort Meade from all of these sources of growth are projected to be 31,000, bringing on-base employment to 71,000. Total direct, indirect and induced employment on base and in the surrounding region related to Fort Meade is projected to rise from 134,000 to 195,695 over the next several years.

B. Comprehensive Public and Private Broadband networks

Increasingly, connectivity is a function of extensive networks of electronic communications systems as well as the hardware and software that support a rapidly evolving technology infrastructure. To be world-class, Howard County must be at the vanguard of a broadband system that connects all public entities throughout the county and across the State of Maryland. Such a network would have the capacity to link every jurisdiction's schools, colleges, libraries, public safety agencies, governments and other institutions, and have the ability to bring private sector networks into the "cloud". With a federal grant of \$115 Million, Howard County is leading this statewide effort to connect all of Maryland's public entities, with sufficient bandwidth to include private sector participation. Construction is to be complete by August of 2013.

C. Efficient Local and Regional Transportation

Howard County, along with its regional partner jurisdictions, must aggressively explore and pursue better transportation connections to and from Washington, Baltimore and employment centers in neighboring suburban counties. The Inter-County Connector (ICC), which is currently under construction, is a major step forward and should significantly improve travel times between Howard County and DC's Maryland suburbs. However, given growth projections, much more needs to be pursued. This strategic plan proposes that the County:

- **Study and Strategy:** Develop a transportation study and strategy for Howard County within the next year. This should include a focus on tactics for reducing projected congestion related to imminent Fort Meade growth and propose ways to finance infrastructure improvements.
- **Roads:** While improved rail transit is critical to the County's long-term connectivity, roads remain the primary mode of transportation for the vast majority of residents and workers today. Fort Meade growth, in conjunction with already congested roads in Central Maryland, requires short-term solutions to better accommodate cars and busses.
- **Transit-Oriented Development:** Explore ways to take advantage of the State's emphasis on transit-oriented development near rail stations and urban centers.

- **Rapid Bus:** Explore a rapid bus connection from Howard County employment and residential centers to growth centers in the Washington-Baltimore Corridor, including Fort Meade, the airport and commuter rail stations.
- **MARC:** Explore more effective use of the MARC system to better connect Howard County to Washington, DC and Central Maryland.
- **Alternative Work and Service Delivery Solutions:** Explore other options to reduce traffic congestion and wasted time commuting, such as telecommuting, teleconferencing, flexible work hours, promotion of biking and walking to work, wireless internet connections on public transit and ride sharing.

Issues related to local transportation have been discussed and debated in Maryland for many years; however, recent and projected growth at Fort Meade and in the Washington-Baltimore Region should push this issue to the top of Howard County’s priority list. This strategic plan bases this assertion on a few key facts:

- **Central Location:** Howard County is located at the center of the nation’s 4th largest consolidated metro area: Washington-Baltimore.
- **Fort Meade Growth:** see section above.
- **High Home Prices:** Howard County’s home prices are high relative to the national average, making it difficult for many workers to afford to live here.
- **High Percent Commute:** Almost 64 percent of Howard County residents travel to work in other counties, ranking the County 5th among all counties nationwide. Almost 58 percent of Howard County based jobs are filled by those who commute in from surrounding jurisdictions.
- **Entry-Level and Service Workers:** The above factors will make it increasingly difficult for Howard County employers to recruit entry-level knowledge workers who demonstrate a preference for urban living with easy access to their work. It also impacts the ability to hire service workers that residents depend on for food service, retail, hotel and other services.

D. Strategic Alliances and Partnerships

In pursuit of its vision, Howard County must maintain and forge a wide variety of strategic alliances and partnerships. County entities must work together to realize desired outcomes, jurisdictions within the Baltimore-Washington region are highly inter-connected and inter-dependent, and regional transportation networks impact the County’s ability to connect people and products to the global market. For each of the key connections listed below, Howard County must inventory and evaluate key relationships and identify gaps and opportunities.

- ***Connecting within the County***

Successful implementation of this strategic plan is highly dependent on consistent cooperation and involvement of all County agencies and other public- and private-sector partners. The Howard County Economic Development Authority does not ‘control’ most of the factors identified as critical in this strategic plan, but serves largely as a thought leader/convener/influencer in an effort to promote desired objectives.

Within Howard County, the most critical objectives are to ensure top priorities from this strategic plan are included in the County’s General Plan and to foster and maintain partnership and engagement among local public- and private-sector leaders in implementing the plan and monitoring progress.

- ***Connecting to the Nation and World***

Few metro areas in the U.S. possess the comprehensive inter-city transportation infrastructure that is available in the Washington-Baltimore Region for connecting people and goods to national and global destinations and markets. Howard County’s position at the center of the region provides its businesses and residents with ready access to major interstates; three of North America’s 30 largest airports; Amtrak rail service along its busiest U.S. stretch in the Northeast Corridor; and the Port of Baltimore. The County’s access to Washington, DC also serves as a major draw for international residents and decision-makers.

Howard County must support and participate in efforts at the State and regional levels to maintain and build on these assets and opportunities, including:

- ***Transportation:*** Remain engaged in organizations and efforts related to furthering inter-city transportation networks, including the Maryland Aviation Administration, the Metropolitan Washington Airports Authority, the Port of Baltimore, and efforts to promote and protect Amtrak’s Northeast Corridor rail network.
- ***Attracting International Firms and Immigrants:*** Boost and refine efforts to target international firms for new operations in Howard County. Partner with the Maryland Department of Business and Economic Development, the Greater Washington Initiative and the Economic Alliance of Greater Baltimore and other economic development agencies to better leverage efforts. Continue to build relationships with existing firms that also have operations overseas and support current efforts to facilitate a smooth transition for new international residents.
- ***Global Awareness:*** Powerful forces are at work shaping the national and global economy that can eventually have great impact on local areas. Howard County must remain aware of current and forecast global trends and how it might be impacted economically. Key current trends today include the economic downturn, a shift in wealth from the West to the East (Asia), more international orientation, more limited natural resources, green and sustainable development, population movement to metro areas, large national debt, terrorism/cyber security, and health and health care.

- ***Connecting to Greater Washington***

Over the past decade, Greater Washington has risen to become the nation's strongest regional economy. Its growth is being driven by unique economic, career and quality of life opportunities that attract businesses and people from around the world. Howard County is reaping significant benefits due to its location at the northern edge of this market; however, the relationship could be leveraged to even greater advantage. The Inter-County Connector (ICC) should significantly improve the connectivity between Howard County and DC's Maryland suburbs. The most important opportunities are:

- ***Washington Metro:*** Direct access to a Metro line should be a long-term goal, since this would connect regional workers to jobs in Howard County and connect County residents to jobs and amenities throughout Greater Washington. If Howard County is to be truly connected to Greater Washington, it must be well-integrated into the region's mass transportation infrastructure. The Washington Metro is the 2nd busiest subway system in the U.S.; however, its rail lines extend only as close as Silver Spring and Greenbelt in neighboring counties.
- ***MARC Trains:*** MARC commuter trains provide regular weekday service between Baltimore, BWI Airport and Washington, DC. Improved public transit access to the BWI station from key employment and residential centers in Howard County would provide a short-term solution to public transit issues.
- ***Federal Government:*** Howard County should continue its work to connect existing small firms to local government contractors and educate them on the federal procurement process.
- ***Marketing and Census Affiliation:*** Howard County should continue to strengthen its affiliation with Greater Washington and its strong reputation as a global economic and political power. It can accomplish this through internal marketing efforts, its relationship with the Greater Washington Initiative, and working to ensure the Washington-Baltimore Region remains a consolidated metro area following the 2010 Census.

- ***Connecting to Greater Baltimore***

Howard County must better connect to Greater Baltimore because its image, workforce and job opportunities depend greatly on this relationship. The most critical aspects involve:

- Expansion of mass transit (light rail/rapid bus) from Baltimore City to Columbia and other employment centers.
- Support and involvement in improved regional transportation planning and policy through the Greater Baltimore Committee (GBC), Baltimore Metropolitan Council (BMC) and Central Maryland Transit Alliance (CMTA)
- Support and involvement in improved regional marketing and team building, primarily through the Economic Alliance of Greater Baltimore.

Greater Baltimore has emerged as one of the nation's more successful economies over the past decade, driven by major expansions of its economic anchors; strong growth in professional, technical, scientific, health care and education-related occupations; the emergence of a top 10 U.S. downtown; a lower cost Northeast U.S. location; and its growing economic interaction with Greater Washington. Revitalized city neighborhoods in and around Downtown Baltimore have become the locations of choice for many of the region's young knowledge-workers, empty nesters and new and expanding companies.

- ***Connecting to the State of Maryland***

Maryland is positioned as one of the best performing state economies in the nation today and is one of only eight U.S. states with a Triple-A bond rating. However, existing businesses express concerns over certain aspects of the State's business climate and Maryland continues to face budget hurdles related to declining revenues, although the situation is not as dire as in many other U.S. states.

Top priorities include:

- ***State Budgets:*** Work to ensure Howard County receives its fair share of State investments and allocations and that contingency plans are prepared in the event budgets for key economic development efforts decline.
- ***Economic Development:*** Improve marketing coordination and service delivery among state, regional and local economic development agencies.
- ***Business Climate:*** Continue to promote necessary business climate improvements at the state level through interaction with Howard County business and thought leaders.

3. Reinvent the Community

This strategic plan contends that, in the face of significant upcoming change, Howard County can best preserve its highly prized community characteristics and leverage unparalleled economic opportunities, by re-imagining and reinventing its approach to growth. Forces currently coming together in the market present a unique opportunity to firmly establish Howard County as a known global tech center. However, this near-term opportunity is limited by a development culture, and planning and zoning guidelines, focused almost solely on Greenfield development.

Consider:

- Fort Meade growth presents the most significant opportunity for high end job growth and development ever experienced in Howard County; and perhaps the greatest economic development opportunity in the United States over the next decade.
- Howard County has a limited inventory of available Greenfield land to accommodate future growth.

- Howard County will not be able to take full advantage of projected business growth opportunities in Central Maryland if it does not have adequate, well-planned office parks and buildings available to meet future space and amenity needs.
- Route 1 and Route 40 have become ‘tired’ thoroughfares in need of revitalization, with aging strip centers and large parcels of underutilized, older developments.
- Nationally, people are demonstrating a preference to live in walkable, urban town centers that offer a unique experience. Close in, suburban town centers that have embraced ‘new urbanist’ principles are proving to be the most desirable and sought after places to live and operate businesses in major metro areas throughout the United States.
- Columbia’s Town Center and village centers have become obsolete. This is likely contributing to the retail employment decline in the County, which was down 11 percent over the past 10 years even though the County possesses the most desirable demographics in the region. There are also rising concerns that the lack of vibrant urban centers will limit the County’s ability to attract and retain young adults and knowledge workers.
- Limits to business and residential growth will impact potential tax revenues and the ability of the County to invest in quality of life assets and amenities.

The ‘reinventing the community’ theme implies not only the need for physical redevelopment of maturing areas, but also for a change in culture, attitudes and other intangibles that foster a more nimble, proactive economic development approach. This new direction must be embodied in the new General Plan for the County to best ensure Howard County’s highly desirable quality of life and strong economic performance are maintained and enhanced over time.

A. Downtown Columbia Revitalization

The effort to renew Downtown Columbia is critical to Howard County’s economic future and is strongly endorsed by this plan. This modern urban center will create vibrancy, a sense of place and a needed anchor that will go a long way in rebranding the County for the 21st Century. Downtown Columbia will play a critical role in attracting and retaining the knowledge workforce increasingly required for the high skill, high wage jobs being created in the County and region.

B. Redevelopment Approach to Existing Business Parks

This strategic plan strongly endorses new guidelines in the General Plan that encourages high density, mixed-use development in strategic locations. As the availability of Greenfields for new development in Howard County decreases, and the desire for companies to locate and expand in the Baltimore-Washington Corridor increases, the County must devise new, sustainable ways to accommodate desired business and residential growth. The County should promote and support redevelopment of existing low-rise and outdated properties into new, taller structures in designated employment centers and office parks.

Existing business parks have a natural concentration of land that lends itself to unique, higher density development, providing maximum economic impact. This promotes the highest and best use of existing properties by producing additional square footage in convenient locations and makes good use of existing public infrastructure.

C. Create Great, Diverse, Unique, New and Renewed Communities

Columbia/Ellicott City in Howard County is ranked as one of the top two places to live in the United States. To maintain and cement this status, Howard County must be viewed as a dynamic location that continually adapts to market realities and preferences. Critical to the reinvent theme is the creation of truly great communities. In this case, the primary areas of focus are Downtown Columbia (see bullet A. above), the village centers, Route 1, Route 40, retail and housing for all.

- **Village Centers:** The village centers were considered innovative when first opened in the 1970s and some continue to perform adequately. However, the market has generally moved away from internally focused, small commercial pockets and new strategies and concepts are required. Better signage and an appropriate retail mix is critical to the renewal of these neighborhood centers.
- **Route 1:** The Route 1 corridor provides a tremendous opportunity to accommodate large-scale development and growth in Howard County and is the closest employment zone in Howard County to Fort Meade. After the build-out of Columbia Gateway and mixed-use developments at Emerson and Maple Lawn, Route 1 is the logical corridor to accommodate new growth. It sits at the “bulls eye” of the Washington-Baltimore Region and has the surface transportation, renewable land and other infrastructure required for development. This strategic plan endorses the Route 1 Revitalization Plan and the development of new economic incentives and tax policies to support land-use and economic development goals for this corridor.
- **Route 40/Gateways:** In addition to Route 1, this Plan believes Route 40 is an important transportation corridor that would benefit from a focused revitalization strategy. The Route 40 Plan and design manual *were adopted in June 2010 by Howard County.*
- **Retail:** Retail is critical to mixed-use projects, urban centers and the overall quality of life in a community. Howard County’s more aggressive efforts to attract high profile retail operations are starting to pay off, as evidenced by recent announcements from Wegman’s and REI. However, if the above centers and corridors are to be revived to meet modern expectations, even more comprehensive retail attraction and center renewal efforts are required, particularly in light of the current economic slowdown.
- **Housing for All:** A wide variety of housing types are needed in the County to accommodate desired growth among all income brackets and occupation types. Higher average home prices and rents have pushed many entry-level and service workers further out on the metro fringe, or into certain areas of Baltimore City, where housing is more affordable. The lack of transit options makes it more likely that these workers will choose to work closer to where they live. To support diversity, the workforce and local businesses, a broad range of housing options should be maintained in Howard County.

D. Ensure Adequate Infrastructure and Critical Resources

Increasing demand, need for extensive investment in aging infrastructure and lack of adequate alternatives have moved critical resources such as energy, water and sewer capacity to the forefront of economic development planning in cities worldwide. The Economic Development Authority should work closely with energy, water, sewer and waste providers and County leaders to ensure that planning, preparedness and reinvestment in critical resource infrastructure are state and local priorities.

E. Develop Tools to Make these Priorities a Reality

Reinventing our community is a theme that should dominate Howard County development for the foreseeable future. This strategic plan wants to ensure that plans, implementation tools, partnerships and a new development paradigm are embraced in a way that allows them to become reality, as opposed to a concept.

The goal of enhancing existing communities and encouraging compact, mixed-use, sustainable development requires:

- **General Plan:** Inclusion of components of the Reinventing Theme in Howard County's 2010 General Plan and zoning guidelines.
- **Partnership:** Bringing the right people together to (among other things) advance the reinventing concept into the General Plan. This partnership should work to ensure that "smart" redevelopment occurs in targeted reinvestment areas - Downtown Columbia, village centers, Route 1 and Route 40.

4. Innovation Community

The innovation theme stresses the importance of entrepreneurship, new product and technology development, problem-solving, information sharing, the attraction of young, upwardly mobile professionals, and a recognized tech identity. The Federal Government and its IT and government contractors have established a solid and growing base of large technology firms and subcontractors in Central Maryland. In the private-sector, as larger firms down-size and outsource, small businesses, entrepreneurs and new ideas from the academic community are increasingly important to long-term job creation, community wealth and opportunity.

Howard County and the Washington-Baltimore Region are national leaders in innovation, research and technology. Much of this activity is driven by the federal government, including research funding awarded to the National Institutes of Health and Johns Hopkins University, new innovations by IT and defense contractors, and the thousands of small businesses that have been established to support the region's agencies and contractors.

This strategic plan proposes strategies that will best leverage the federal government anchor, while also promoting new opportunities for innovation in the private-sector. The key elements are: branding Howard County as a global tech center, cultivating an entrepreneurial climate, green community and technologies, and promoting innovation through quality communities.

A. Branding Howard County as a Global Tech Center

Develop and implement a comprehensive branding effort for Howard County to establish a distinct and readily identifiable research and technology brand in the global marketplace.

- **Research Park:** Establish a physically defined and branded geography to serve as an umbrella ‘research park’ for Howard County, and perhaps other portions of counties in Central Maryland. This would not involve assembly of new land for a park, but would instead be a marketing effort that pulls together existing business parks (e.g., Gateway, Maple Lawn, and Emerson in Howard County, and/or National Business Park in Anne Arundel County) under a jointly-marketed research brand. The basic ingredients of the nation’s best known research parks are present in the County, including top research universities; one of the largest professional, scientific and technical employment bases in the United States; presence of large IT operations; a strong entrepreneurial base; attractive, high quality office parks; a desirable quality of life; and a top 25 North American airport. This branding effort is not intended to just take place on a map, but must also include associated policies, planning and zoning, government support (all levels) and engagement of the higher education community.
- **Catalog and Integrate Innovation Assets:** Howard County and the local region are rich with innovation assets; however, these assets have not been packaged or well-leveraged to encourage creation of a recognized innovation culture. To firmly establish an innovation environment, this plan calls for the Authority to catalog the wide variety of technologies being developed in the County/region, including technologies relating to cyber security, space exploration, medical, and green development, to create a greater understanding of the area’s tech sector and its potential. The County should promote the integration of these technologies into an ‘umbrella’ innovation sector, as opposed to separate industries, with particular focus on the strong professional, scientific and technical workforce as the core of the center.

B. Cultivate an Entrepreneurial Climate

The cities most frequently associated with strong entrepreneurial climates, such as Austin, TX; Silicon Valley, CA; and Research Triangle Park, NC (Raleigh-Durham), are places that have established supportive, connected technology communities and maintained focus on quality of life. In addition to the other tactics in this innovation section, this plan emphasizes the need for:

- **Incubation:** Incubation programs and facilities have a positive impact on a community’s economic health by maximizing the opportunities for success among emerging companies. Howard County’s NeoTech Incubator has received top national awards for innovation from the National Business Incubator Association (NBIA). This program should be evaluated frequently to determine how and when expansion should take place.
- **Celebrate Entrepreneurial Success Stories:** In markets with strong cultures of innovation, entrepreneurs are celebrated as local ‘rock stars’. Howard County should ensure local innovators are viewed in this light.

- ***Business Support:*** The Howard County Economic Development Authority, the Chamber of Commerce, other business groups, and larger businesses should provide connections, mentoring, problem-solving and other support for the entrepreneurial community.
- ***Flexible Work Environments:*** Promote teleworking, flexible work schedules, and cyber cafés in the County to accommodate the diverse variety of working preferences desired in the technology field.
- ***Financing:*** Connect local entrepreneurs to available financing, including venture and angel capital; wealthy locals; and public innovation funding sources at the State and federal levels.
- ***Small Disadvantaged Business:*** Prioritize and leverage opportunities related to small, minority, and women-, veteran- and disabled-owned businesses. In a highly educated, diverse and inclusive community such as Howard County, this segment provides tremendous potential for local economic growth.
- ***Policies:*** Stay on top of the needs and wants of local entrepreneurs and work with local and state government officials to ensure creation of a business climate that ‘gets it’ as it relates to technology and small, minority and women-owned business needs. This should include taxes, regulations, incentive programs, and the workforce.

C. Green Community and Technologies

As an innovative community, Howard County has focused on green and sustainable practices and fostered the growth of the green technology sector. Through a combination of policy, incentives and government initiatives, Howard County has become a model green community. In support of its efforts to be known as a global tech center and to continue to be known for its high quality of life, the County should continue to enable and more aggressively promote its rising stature as a sustainable community.

Howard County recently passed legislation requiring publicly funded buildings to achieve a LEED silver rating and large private buildings to achieve LEED certification. The County also adopted a five-year property tax credit for businesses that achieve LEED Silver, Gold or Platinum and a residential property tax credit for homes that install renewable energy. The County offers a 5% price preference for vendors supplying environmentally preferred products and has made significant investments in green technologies including covering a capped landfill with a solar array, installing solar panels on public buildings, a landfill gas to energy project, the largest hybrid fleet in the State, a new pilot project with electric buses that charge with electromagnetic induction, and a variety of energy efficiency upgrades to government buildings and County infrastructure.

These initiatives, among other County policies and practices, have helped position Howard County as a sustainable community. However, as the green technology sector is one which is rapidly evolving, the County must strive to maintain its status as a leader in this field. The County should focus attention and support on the green technology sector. The recently established Green Business Council is a good start.

D. Promoting Innovation through Quality Communities

Place matters to innovation. The places that continue to attract and retain the largest numbers of knowledge workers and businesses are typically those that value and protect their unique way of life, including authentic, creative, engaged and amenity-rich communities. Physical amenities and surroundings provide the venues that foster personal connections and the ‘real’ community that innovators typically seek.

- ***Downtown Columbia:*** Vibrant urban centers, such as that envisioned in the Downtown Revitalization Plan, support the attraction of the creative-class and technology employers. The implementation of the Downtown Revitalization Plan is, therefore, critical to achieving the objectives of this strategic plan.
- ***Community of the Future:*** Celebrate and lead the way in caring, diversity (age, gender, race, nationality and ideas), creativity, environment (green, sustainable, rural, land preservation and local produce), outdoors (parks, bike trails, and outdoor recreation and adventures), education, cultural arts, architecture, housing options, and health care.

Findings from the Benchmarking and Trends Assessment

The 2011 Strategic Plan is designed to serve as a road map to make Howard County a national and international model for 21st Century economic development. To promote creation of a well-grounded, forward-thinking strategy, the Authority determined that provision of up-to-date information that quantified Howard County's true competitive position and outlook was a critical first step.

The Authority retained an outside economic development consultant to update and expand the Benchmarking Assessment conducted for the 2006 Strategic Plan. The consultant was also tasked with facilitating a series of information, brainstorming and discussion sessions with the Strategic Plan Committee. The assessment was developed using a variety of inputs, including:

- **U.S. County Benchmarking:** Howard County was benchmarked against 20 strong, high growth counties in selected metropolitan areas throughout the U.S. for a wide variety of economic and performance factors. Where possible, Howard County's national ranking among all U.S. counties was presented.
- **Local County Benchmarking:** Howard County was benchmarked against healthy and growing counties in the Washington-Baltimore Region for a wide variety of economic and performance factors.
- **Top 25 U.S. Metro Area Benchmarking:** the Washington MSA and Baltimore MSA were benchmarked against the 25 largest US metro areas for a wide variety of economic and performance factors. This provided information on the relative strength of the surrounding region on a national scale.
- **Global Trends and Outlook:** Global projections and trends produced by economists, analysts and prognosticators were presented to stimulate thought about the factors that might impact the local economy in the coming decades.

The benchmarking and trends assessment was critical to the strategic planning process because it provided the Committee with the broad range of information needed to make the best informed decisions and recommendations.

Howard County: A Top Performing County . . . in a Top Performing Region

The Washington-Baltimore Region – A Global Powerhouse

Howard County is situated at the center of one of the world's strongest performing economic markets – the Washington-Baltimore Region. The Washington and Baltimore metro areas each rank at or near the top for key economic indicators, including:

- **Gross Metro Product (GMP):** If the Washington-Baltimore Region were a nation, its GMP (the comparable measure for nations is Gross Domestic Product, or GDP) would rank it the 17th largest economy in the world.

- ***Income and Growth:*** Among the 25 largest U.S. metro areas, Greater Washington ranks 2nd for per capita income (\$56,510) and 5th for per capita income growth over the past decade. Greater Baltimore ranks 9th for per capita income (\$47,333) and 1st for growth.
- ***Unemployment Rate:*** Among the 25 largest U.S. metros at the end of 2009, the Washington MSA had the lowest unemployment rate at 6.1, while the Baltimore MSA ranked 5th lowest at 7.7. The region has consistently remained 2 to 3 points below the U.S. average rate over the past decade, including during the recession.
- ***Employment Growth:*** Among the 25 largest U.S. metros, the Washington MSA ranked 3rd with 10.1% employment growth from 2000 to 2009, while the Baltimore MSA ranked 8th with 1.7% growth. Sixteen of the benchmark metros realized zero or negative growth. The U.S. average growth rate was -0.7%.
- ***Rankings:*** Over the past several years, the Washington and Baltimore MSAs have consistently been ranked among the top 10 markets in a wide variety of publications based on economic performance and quality of life attributes. The difference between now and a decade ago is that back then Greater Washington was starting to be ranked among the top 20 markets and Greater Baltimore was seldom ranked. Today, both markets are increasingly recognized as top performers with a bright outlook.

Drivers of the Region's Strong Performance

The strong performance of the Washington and Baltimore metro areas can be attributed to a set of factors that differentiate the region from others nationwide. The following list focuses primarily on factors driving the Maryland portion of the Washington-Baltimore region:

- ***Highly Educated Population:*** Among the 25 largest U.S. metros, the Washington MSA ranks 1st for percentage of the population with both bachelors and advanced degrees, with figures that are well above the U.S. average. The Baltimore MSA ranks 9th for bachelors and 4th for advanced degrees.
- ***Merging of Washington and Baltimore:*** The Washington-Baltimore region has officially been recognized as a consolidated metro since 1990; however, the merging of the two regions accelerated considerably over the past decade. While the Baltimore MSA has its own unique economy, the increasing shift of companies and people northward from Washington over the past decade has provided an additional boost that has helped make Greater Baltimore one of the stronger performing U.S. metro areas. The Inter-County Connector (ICC) highway is scheduled to open in 2011, and will better connect Maryland's DC suburbs to Greater Baltimore.
- ***Federal Government Agencies and Contractors:*** The Maryland portion of the Washington-Baltimore Region is home to Fort Meade, the National Security Agency, Social Security Administration, Centers for Medicare and Medicaid, the Food and Drug Administration, and National Institutes of Health, among others. These facilities/agencies employ thousands of highly educated people working on some of the nation's most critical missions. These missions are also supported by thousands of highly-skilled employees working for government contractors. The current expansion of agencies and contractors due to BRAC/Cyber Security is projected to add over 60,000 jobs to the region over the next several years.

- ***Strength and Growth of Economic Anchors:*** Over the past decade, at least \$1 billion has been invested in expansion at each of the region's key economic anchors: BWI Airport, UM-Baltimore and its Biopark, Johns Hopkins Medical Center & Science Park, Fort Meade, and Aberdeen Proving Ground. The Port of Baltimore has also received focus and investment that have made it the #1 roll-on, roll-off cargo port in the US.
- ***Strength and Growth of Industries:*** Greater Washington and Greater Baltimore have high concentrations in industries and occupations that are high paying and have experienced relatively strong growth rates. These include education; professional, scientific and technical services; finance (wealth management); and health care.
- ***Entrepreneurship, Research and Innovation:*** The Washington-Baltimore Region ranks among the top 10 US markets for the start-up and growth of new businesses and scientific research. The region also leads the nation in the concentration of IT professionals.
- ***Top U.S. Downtowns:*** The region is anchored by two of the nation's top 10 downtowns in Baltimore and Washington, as measured by population, wealth, employment, and cultural assets. Downtown Baltimore has grown to over 40,000 in population and the areas in and around downtown have generated over \$9 billion in investment in new development projects since 2000. These strong and growing urban environments, and the cluster of amenities they offer, support the attraction and retention of the knowledge-workers increasingly required to fill jobs throughout the region.
- ***Location in Northeast U.S. Corridor:*** Greater Baltimore/Central Maryland is located in the Washington-Boston Corridor, the nation's largest megalopolis. This corridor is home to the nation's highest concentration of corporate headquarters, bioscience firms, information technology firms, top-ranked universities and highly educated residents. A Greater Baltimore base offers companies and residents easy day trips to cities in the corridor through Amtrak and BWI Airport and a relatively more affordable Northeast Corridor location in which to live and operate a business.

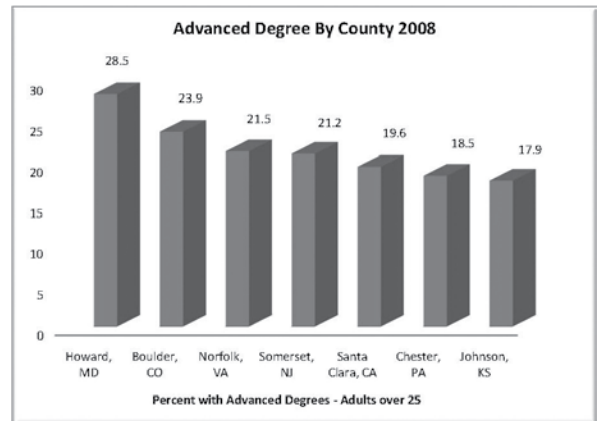
Howard County: Cluster of Unique Assets Drives Strong Economic Performance

Howard County continues to be a top performing U.S. jurisdiction, driven by a strong set of economic development drivers/advantages. If considered individually each of these factors would be considered important. However, when grouped together, they form a cluster that gives Howard County a unique advantage.

1. ***East Coast Location between Washington and Baltimore:*** Howard County is located at the center of the Washington-Baltimore Corridor, the 4th largest combined metro area in the U.S., with a population of over 8.5 million.
2. ***Top Performing Public Schools:*** Howard County's public schools are consistently ranked as being among the best in the nation. This strong performance and reputation serve as a magnet in attracting residents and businesses to the County.

3. Highly Educated Population/High Quality Workforce:

Howard County ranks #1 among the regional and national benchmarks for percentage of the population age 25+ with bachelor's degrees, at 59.6 percent. Howard County is also located at the center of the nation's most highly educated metro area, Washington-Baltimore, providing access to the best knowledge-workforce available - anywhere.

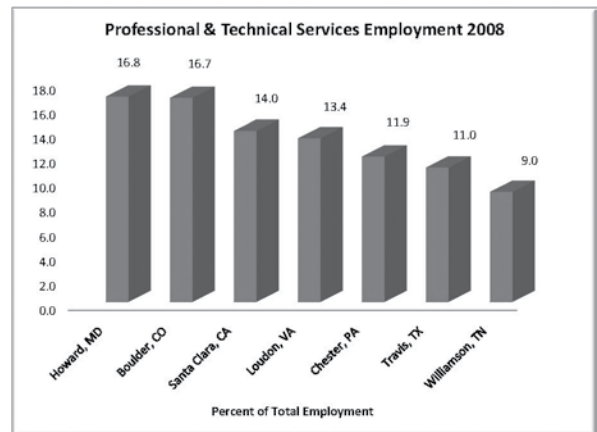


4. Fort Meade-NSA/Federal Government

Agencies: The largest employer of Howard County residents is Fort Meade, which is actually located in neighboring Anne Arundel County. Expansion of Fort Meade through NSA, BRAC and the Cyber Command and related initiatives will serve as the single largest economic growth engine impacting Howard County over the next decade.

5. Professional, Scientific and Technical Services Industry:

Howard County ranks 1st among the national benchmark counties for percentage of the workforce in professional, scientific and technical services. This high-skill, high-wage industry includes IT and government contractors (many serving Fort Meade), biosciences, scientific research, management consulting, architecture and engineering, and legal.



6. Access to Intercity Transportation:

Howard County offers convenient access to air and rail networks that connect the region to national and global destinations. Amtrak's Northeast Corridor is the nation's busiest passenger rail corridor and offers a convenient local stop at BWI Airport. The County also has access to three of North America's 30 largest airports in Dulles, BWI and Reagan National.

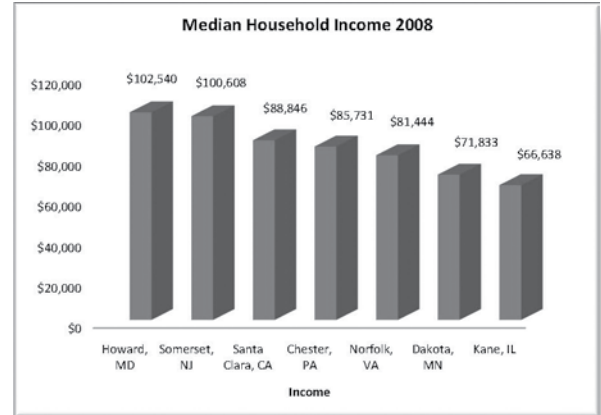
7. Population Diversity: Population diversity is increasingly recognized as leading to more vibrant and globally-aware communities. Howard County is home to a highly diverse population base, particularly relative to other high-growth, high-income suburban jurisdictions. The county is 67.2 percent white (19th among the 21 national benchmarks), 18.6 percent black or African-American (4th), 11.9 percent Asian (4th), and 5 percent Hispanic (14th).

8. Well-Functioning Community: Howard County is characterized as a well-functioning and well-managed community based on: effective government; cooperation between business, government and non-profits; and a unique sense of engagement, community and civic pride among residents. Effective government is rarely viewed as a strength in most jurisdictions, particularly in the current economic environment, making Howard County unique in this regard. A fast-track process for site plans and permits, online permitting, successful partnerships, and a consistent effort to continually improve the business climate and quality of life have been

critical to Howard County's success. Howard is also one of only about 30 counties nationwide to receive triple-A bond ratings from each of the three major ratings agencies; evidence of a well-managed jurisdiction.

This group of factors has been leading to superior economic results in Howard County:

- **High and Growing Incomes:** Howard County had the 4th highest median household income in the US in 2008, at \$102,540. The County's per capita income growth from 2000 to 2007 was 35.7 percent, ranking it 1st among the 21 U.S. county benchmarks.
- **Lower Unemployment Rate:** Howard County has maintained an unemployment rate that is about 5 percent below the US average rate. While the County rate rose from 3.1 percent in 2008 to 5.1 percent in 2009, benchmark counties nationwide realized much greater job losses. In both years, Howard County had the 2nd lowest unemployment rate among the 21 U.S. benchmark counties.



Howard County's Challenges: Future Threatened by Symptoms of a Maturing County - Stagnant Business and Retail Centers, Limited Undeveloped Land, Infrastructure Constraints, and Complacency

Howard County is arguably one of the best performing counties in the United States. However, it is beginning to experience challenges commonly associated with maturing jurisdictions. The most critical challenges relate to:

- **Lack of Local and Regional Mass Transportation Access:** Howard County faces significant issues related to traffic, congestion and lack of regional mass transit connections to Washington, Baltimore and neighboring jurisdictions. The County realizes significant utilization from pass-through traffic and experiences one of the highest rates of daily in- and out-commuting in the nation. About 64 percent of Howard County's working residents commute to jobs in other jurisdictions (5th highest in the U.S.), while about 52 percent of those working in Howard County commute in from outside jurisdictions. The County's location central to a large number of high quality jobs throughout the Baltimore-Washington Region, combined with its attractiveness as a place to live and work, make this situation a continuing reality.

A 2009 study ranked Greater Washington 2nd for traffic congestion delay and Greater Baltimore 15th. For congestion growth from 1982 to 2007, Greater Washington ranked 1st and Greater Baltimore 9th. Rapid job growth projected in and around Fort Meade over the next several years due to BRAC, the Cyber Command and other agencies on and off post is likely to make the situation in the Corridor worse. If not effectively managed, this is likely to limit the County's ability to remain competitive in attracting new residents, businesses and the workforce local firms need to grow.

- **Workforce-Related Threats:** The local and regional workforce is one of the best in the nation as evidenced by both data and company feedback. However, an emerging set of workforce-related issues threaten to limit the County's potential.
 - **Technology worker shortage:** The Washington-Baltimore Region has one of the best and largest IT workforces in the nation; however, the area's growing base of government agencies and contractors requires even more high-skilled workers to meet fast-growing demand. There are currently hundreds of job openings in the Region's IT and government contracting firms and many more are projected due to BRAC and Cyber Command. Most of these federal-related positions require security clearance, making these positions even harder to fill. IT workers are also increasingly required in the finance and health care industries.
 - **Regional Mass Transit:** see discussion in the first bullet above
 - **Worker exchange:** see discussion in the first bullet above
 - **Aging Population:** Howard County's median age is 37.9 years, ranking it 17th among the 21 US benchmark counties. Tech metro areas, such as Austin (32.5 years) and Raleigh (34.6) continue to attract young workers. The younger workers who live in the area are increasingly attracted to living in and near Downtown Baltimore and Washington, DC. With the adoption of a new master plan for its redevelopment, however, Downtown Columbia provides an exceptional opportunity to create a unique urban environment that will help attract younger workers.
 - **Housing Affordability:** While Howard County offers a diversity of jobs in many different industries, many entry-level and lower-income workers cannot afford to live in the County. Housing prices in neighboring jurisdictions in the Region are also relatively high, forcing potential workers to make long commutes from more affordable areas or find jobs in other markets.
- **Lack of Available Land for Future Development:** Howard County will not be able to continue to grow as it has in the past (Greenfield development) for much longer. With a land area of only 252 square miles, Howard is the smallest of the local and national benchmark counties. The County also has preservation plans and guidelines that limit the amount of undeveloped land available for future development. If the County desires to maintain and grow its business and residential base, while also maintaining its preserved agricultural land and character, it will require new, creative development and redevelopment strategies that make better use of available land and infrastructure.
- **The Need for Renewal:** Most of Howard County's town/village centers and retail districts along Route 1 and Route 40 were conceived and developed during the 1970s or earlier. While they were considered innovative in their day, village centers have become outdated as residential, retail and commercial centers. Participants in the strategic planning process expressed concern that young adults find the lack of a vibrant urban environment in the County unappealing.

The County has the lowest concentration of retail employment among benchmark counties in the Washington-Baltimore Region and is below the U.S. average for retail. It experienced an 11 percent drop in retail employment over the past decade, ranking 19th among the 21 U.S. benchmarks and well below the national average. This is surprising given Howard County's very strong demographics and buying power. If Howard County is to maintain its above average quality of life and retain and attract the knowledge-workers needed to staff the growing regional workforce, it will need a new way of thinking related to growth.

- **Potential for Complacency:** With so much going for it, Howard County's public and private sector leadership must avoid complacency in an ever-expanding, global marketplace. Many of the most successful places and organizations have lost their competitive position because they waited too long to respond to changing market dynamics.

- **Global and National Trends/Threats:** This strategic plan also takes into consideration global and national trends and factors, such as:
 - Growing Preference for Walkable, Urban Environments, including in Suburban Areas
 - Increasing International-Orientation
 - Shift in Global Wealth from West to East (From the U.S. and Europe to Asia)
 - Natural Resources: Availability and Costs of Energy and Water
 - Technology Breakthroughs
 - Green and Sustainable
 - Terrorism/Cyber Security
 - Government Investment in Infrastructure: Roads and Mass Transit
 - Massive National Debt
 - Health and Health Care

The Authority's Role

The themes and opportunities presented in the 2011 Strategic Plan require the Authority to expand its communications, advocacy and performance measurement roles. The Authority intends to provide greater assurance that Howard County is using the Connected, Knowledge, Reinventing and Innovation themes to provide the expected economic and quality of life results.

While the Authority's role will be expanded, it cannot lose sight of what has led to Howard County's success. The components of previous strategic plans are still important to this success and the Authority must ensure that those efforts and goals are maintained and improved.

A. Land Use

The current Howard County General Plan projects "build out" of Howard County within the next 10 to 15 years. To continue expanding the county's economic base, reinvestment and revitalization of maturing employment areas have become a major component of the county's long-range development strategy. The Authority has adopted the goal of optimizing the use of land resources. Working in conjunction with local and regional land use planning partners and community leaders the Authority must continue to advance the notion that greater heights and densities in targeted areas of Howard County can ensure that growth in jobs and the commercial tax base will continue into the future.

1. **Redevelopment:** As the availability of greenfields for new development in Howard County decreases, and the demand for companies to locate and expand in the Baltimore-Washington Corridor increases, the County must devise new, more sustainable ways to accommodate business growth. This plan strongly endorses new guidelines in the General Plan and zoning statutes that would promote and support redevelopment of existing low-rise and outdated properties into new, taller structures in designated employment centers and business parks. The Authority's representative to the General Plan Committee will promote this concept.
2. **Agricultural Marketing:** The Authority, through its Agricultural Committee, identifies appropriate agricultural business opportunities and develops strategies to assist landowners to maximize the agricultural economic viability of their holdings.
3. **Economic Development Plans Align with County Plans:** This Strategic Plan for economic development is one of several drivers for the development of county policies and plans including the General Plan. County master plans for development, water and sewer, transportation, affordable housing and other services recognize and embrace economic development strategies. The Authority, working in conjunction with county government, ensures ongoing incorporation of economic development concepts into the County's General Plan.

B. Business Retention, Expansion, and Attraction

Recognized nationally for the success of its business development program, Howard County effectively uses its strengths of location and market assets to secure its ranking as a top tier business location. The Authority's comprehensive resources are dedicated to retaining and attracting those companies having the greatest positive impact on both Howard County's economy and quality of life. Collectively, these companies have high multiplier

impacts, pay wages above the county average and above industry standards, and fit the local mix of existing employees, businesses and supplier and vendor networks.

Building on a foundation of traditional business support and development programs, the Authority augments its efforts with expanded programming to ensure that Howard County attains its economic potential in concert with its quality of life goals. The following five focus areas define the Authority's activities in support of its business retention, expansion and attraction goals.

- 1. Existing Business Retention and Expansion:** Protecting and nurturing our most valuable asset, the existing business base, is Howard County's most important economic development priority. A significant majority of the county's jobs and capital development comes from the existing business community. The Authority will continue to offer proactive, nurturing support to existing Howard County companies through a partnership of government, business, and education leaders and provide access to financing, market information, workforce development services, connections with key decision makers and will serve as liaison with Howard County government.
- 2. New Business Attraction/Target Marketing:** If the prosperity of the existing business base gives our economy its stability, the recruitment of desirable new businesses brings corporate diversity and new energy. The Authority has brought its resources to bear in establishing Howard County as the region's leader, identifying and recruiting appropriate new businesses through an aggressive and focused program of targeted marketing. This program emphasizes attracting companies in the industries which best fit with the county's location and market assets, while having the potential for maximum positive economic impact. These efforts are implemented in coordination with the county's natural partners (state and regional groups) in economic development. Future success in business recruitment strategies will be dependent on continued enhancement of the Authority's marketing tool kit for attracting new businesses. It includes a comprehensive set of marketing and informational materials, focused branding and an increased emphasis on a dynamic website home page.

Howard County deploys its marketing resources to retain and attract businesses which have the greatest impact on the economy and quality of life through a focused campaign of targeted marketing and outreach. Our marketing targets continue to be the same six categories:

- Federal Government Contractors
- National, Divisional and Regional Headquarters
- Technology-Driven Manufacturing
- Life Sciences, Medical and Biotechnology
- Information Technology and Informatics
- Upscale Retail

These targets have been enhanced and restructured:

- **Federal Government Contractors:** A key focus of the 2006 Strategic Plan was on the recent military Base Realignment and Closure (BRAC) decision of 2005. While the act of Congress and the Presidential Order were new, it was obvious that the addition of approximately 5,000 new jobs at Fort George G. Meade, would result in significant economic benefits as well as additional employment opportunities throughout the Baltimore-Washington Corridor including Howard County.

Simultaneously, the creation of the Pentagon's Cyber Command is being established on post at Ft. Meade. Together these two "economic engines" will generate even greater government procurement opportunities for existing contractors and for new companies clustering into the region. The Authority will develop new marketing initiatives to maximize the benefits to prime and sub contractors in Howard County.

- ***National, Divisional and Regional Headquarters:*** The number of national, divisional and regional corporations that have chosen to move their headquarters operations to Howard County continues to be impressive. Because of higher wages, local procurement, business travel and hospitality and the publicity generated by these operations, the "multipliers" from headquarters facilities is greater than any other sector. These headquarters will continue to be both an attraction and a retention target.
- ***Technology-Driven Manufacturing:*** Manufacturing continues to be an important part of Howard County's diverse economy. Printing and publishing, electronic components, electronic devices and subassemblies as well as medical instruments have helped to maintain a strong manufacturing base in the county. Heavy manufacturing continues to have a presence in Howard County and is an important employment sector. However technology-driven manufacturing is a focus for outreach marketing initiatives.
- ***Life Sciences, Medical and Biotechnology:*** The State of Maryland and the private sector has invested heavily in biotechnology along the I-270 corridor in Montgomery County and in the City of Baltimore, notably bio-parks at the University of Maryland and Johns Hopkins University. With the opening of the Inter-County Connector (ICC) these two markets will be much more conveniently accessible to each other. Howard County's location between these two biotechnology centers creates a unique opportunity for local growth in this sector.

Howard County has proven to be an ideal location for the health care industry, both in the direct delivery of medical services and for the related insurance industry. As noted above, the manufacture of medical instruments and devices is the strength of the Howard County economy.

This sector is an excellent marketing target.

- ***Information Technology and Informatics:*** This category has been broadened since the 2006 Strategic Plan. That plan had a specific focus on "informatics", a term that has not generated wide industry acceptance. The science related to gathering, manipulating, storing, retrieving, categorizing and analyzing large amounts of recorded information is one definition of this industry. Informatics plays a vital role in the fundamental activities of all area federal labs, their contractors, academic institutions and businesses.

The Authority will continue its focus on drawing attention to Central Maryland as the "Informatics Capital of the World"; we will use the more commonly understood term "information technology" in referring to this marketing target.

- ***Upscale Retail:*** Retail is a critical component of quality of life, including revitalization, renewal and reinvestment efforts. Although retail does not typically support high wage jobs, it does serve as a vital amenity for businesses and residents. The Authority will continue to be directly involved in selective retail attraction such as a highly desirable national chain or upscale merchandiser.

- 3. *Business Development Advocacy:*** Not all factors contributing to the success of Howard County's economy and quality of life are the exclusive domain of the Economic Development Authority. To be more effective in influencing public policy, the Authority will be a more active advocate. The Authority will occupy a seat on the General Plan Committee and will advance concepts identified in this Strategic Plan into the new General Plan for Howard County.

The Authority must advocate for issues which impact the retention, expansion and attraction of businesses in Howard County. In this effort, the Authority will work closely with Howard County Government as well as with the Howard County Chamber of Commerce, the Baltimore-Washington Corridor Chamber of Commerce, the Maryland Chamber of Commerce, the Maryland Department of Business and Economic Development and other partners. Beyond these partnerships, the Authority will identify and promote those economic development issues for which it will become the lead advocate.

- 4. *Agribusiness Development:*** In addition to its traditional agricultural commodity production, Howard County's agricultural sector is expanding through the development of alternative farming enterprises, equine, nursery, value-added processing and direct marketing activity. The Authority will maintain its commitment to provide proactive business development and to support agricultural businesses in the county through agricultural marketing programs, regulatory advocacy and educational programs.
- 5. *Business Recognition:*** The relationship between Howard County's economy and quality of life must not be kept a secret. This relationship must be communicated to residents of the county, corporate citizens and external audiences. The Authority coordinates a number of business recognition programs through the Economic Development Achievement Awards, Technology Awards, recognition within the minority business community and other awards. These programs acknowledge the contributions and achievements made by Howard County businesses and expresses appreciation for their contributions to the local economy.

C. Entrepreneurial and Business Support Systems

- 1. *The Center for Business and Technology Development:*** Howard County is a leader in nurturing and supporting start-ups and small businesses. The Center for Business and Technology Development houses the NeoTech Incubator, the Howard Technology Council, Business Resource Center and other partner organizations. By combining resources, these entities support technology entrepreneurs and small businesses by providing technical assistance, business development, meeting facilities, training, educational programs and seminars, ongoing outreach programs as well as mentoring and coaching.

The *NeoTech Incubator* offers an environment in which start-up technology companies can gradually achieve self-sufficiency. Created with support from Howard County government as well as the state and private sector, the facility houses new companies that have the potential to succeed and to create significant new jobs. NeoTech is tied extensively to the business and academic communities, provides coaching and mentoring, shared facilities, business development services through the Business Resource Center, and other resources as support to its companies.

The Authority is driving efforts to expand or build new incubator facilities to support a larger number of technology based start-up firms, and to give the Center a more visible and prominent location that is more accessible to local transportation and more readily identifiable.

The ***Green Business Council*** is a network of companies and individuals specifically involved in the development and implementation of “green” products and services that advance Howard County’s leadership in reducing energy consumption, advancing environmental protection and encouraging widespread adoption of sustainability practices.

The ***Howard Technology Council*** provides vision, awareness, forum and focus for informational programs and business networking events that promote technology businesses in Howard County. By enhancing opportunities for growth, collaboration and success within the technology community, the Howard Technology Council is the premier source for information and other resources. With membership in excess of 100 companies and individuals, the Howard Technology Council has achieved the critical mass necessary to advocate for the interests of the technology community at the local and state levels.

The ***Business Resource Center*** is a central facility for information and referral services to small disadvantaged business and entrepreneurs in Howard County. It fosters entrepreneurial start-up and growth through one-on-one counseling, workshops and seminars, and provides access to a full complement of federal, state and locally-sponsored business development programs. Resident partners in the Center include:

- The Small Business Development Center (SBDC)
- SCORE; Counselors to America’s Small Business
- j-ref, the Jim Rouse Entrepreneurial Fund

The Authority provides office space, administrative support, shared meeting facilities and other resources to these partners in order to achieve business synergies with companies resident in the Incubator, to clients of the Center and to the small business community in general. The Center offers clients a well-stocked library of useful materials, meeting facilities, conference rooms, computer workstations and office equipment.

2. ***Small Disadvantaged Business:*** Population diversity is a vital component in keeping local economies vibrant. The Authority acknowledges that businesses owned by minorities, women or disabled individuals constitute a vital and thriving segment of Howard County’s economy. Through its Committee for Business and Economic Diversity and the Business Resource Center, and in conjunction with its economic development partners, the Authority provides access to a full complement of federal, state and locally-sponsored business development programs. These organizations offer counseling and education regarding business start-up and management, facilitate strategic alliances with larger organizations, provide financing for business start-up and expansions and enable Howard County firms to overcome barriers to equal business opportunity.
3. ***Other Entrepreneurial Support:*** Howard County, working with economic development partners, educational institutions, and the business community continues to develop systems which encourage and welcome innovation and support entrepreneurial careers. These systems include educational programs, financial support and entrepreneurial recognition activities.

D. Marketing and Communications

Many communities benefit from regional and national recognition as good business locations. However, most good places for business are not well known beyond their immediate areas. Howard County must continue to create new and effective

strategies to communicate its successes and opportunities. Through the Authority's comprehensive communications strategy, Howard County has received local, national and international recognition as being the place where business works. The Authority, with support from the local business community, develops and annually updates its marketing and public relations plan. The Authority's expanding role helps to ensure that a dynamic economy coupled with a high quality of life, receive priority status on the county's agenda. The plan includes strategies for marketing Howard County as an attractive business location while also educating its citizens concerning the benefits of a positive business climate. The Authority enlists the support of individual businesses and collaborates with partner organizations to meet these goals.

- 1. *Advocacy:*** The Authority is responsible for advocating activities, programs and policies that will support the attainment of economic and quality of life goals. This includes internal support and information sharing for desired county initiatives and support and involvement in regional and state efforts related to the connected, knowledge, reinventing and innovation themes. A key priority here is to maintain the importance of quality of life as a desired economic development outcome.
- 2. *Outreach Marketing:*** Howard County is centrally located in the Baltimore-Frederick-Washington-Annapolis "diamond." The Authority has a carefully targeted communications plan aimed at promoting Howard County as a premier business location. Expanding on the many assets of Howard County, the Authority assembles individualized packages for prospective companies tailored to their expansion needs and business portfolios.
- 3. *Public Information and Education:*** In gaining local support for economic development programs, many communities have implemented effective communications strategies. The Authority is the recognized supplier of economic information in Howard County. The Authority recognizes the importance of a well-developed approach to communicating economic development goals and value to the community, detailing the role that business taxes and revenues play in the annual budget, bond ratings, infrastructure and quality of life. The Authority also maintains a highly integrated strategy for promoting resources, activities and economic data to the local and regional business community. The Center for Business and Technology Development and its partner organizations are regularly promoted as part of this coherent strategy, as are economic achievements and the noteworthy successes of businesses throughout the county.
- 4. *Marketing Partners:*** Individual communities cannot be successful on their own. Local economic development initiatives must effectively leverage the resources of their surrounding region and state. The connected community theme further elevates the importance of a set of strong alliances between Howard County and its regional and state economic development marketing partners. The Authority works in close partnership with the Maryland Department of Business and Economic Development; the Greater Washington Initiative, the Economic Alliance of Greater Baltimore; and state and regional technology councils. The Authority is responsible for communicating the county's strategic plan to these partners and working to ensure that these groups are supportive of Howard County's goals.

E. Financial Mechanisms

To ensure a robust economy, Howard County companies require financial support. Howard County businesses have access to an array of financial tools, including both traditional and non-traditional sources of capital, to support business growth. Financial incentives result in higher employment and wage rates, lower per capita taxes and an improved quality of life for Howard County residents and businesses.

1. **Financial Incentives:** To compete for new jobs, successful communities have developed rational incentives programs for targeted industry sectors that have the highest positive impact on the local economy and its quality of life. Through the Authority's Incentives Committee, real property tax credits are considered and recommendations are formulated for the County Executive as a means of encouraging existing business expansion and new business attraction through short-term deferral of tax revenues. A computer model estimating the short-term and long-term economic impact of proposed projects is used to determine appropriate levels of incentives and to track their effectiveness.
2. **State and Federal Financial Programs:** The State of Maryland has a full array of financial incentives. These programs enable Maryland to successfully retain existing companies and to attract new firms in the competitive economic development arena. Howard County advocates for the unrestricted access to these funds for Howard County companies. Howard County also utilizes all available federal programs to assist its business retention and attraction efforts.
3. **Economic Development Incentive Fund:** Howard County imposes a fee on the issuance of tax-exempt Economic Development Revenue Bonds. These fees are held by Howard County in a non-reverting Economic Development Incentive Fund and can be used as a county match where required by the State of Maryland loan or grant programs, and for other initiatives that foster business growth in Howard County.

New ways to expand the sources of additional revenues into this fund should be identified, and broadened uses of funds in this program should be explored.

4. **Catalyst Loan Program:** The Economic Development Authority administers Howard County's Catalyst Loan program that provides loans to start-up businesses in Howard County within their first 5 years of operation. Ranging in value from \$50,000 to \$100,000 these low-interest loans are usually deployed in conjunction with a regular bank loan that requires additional equity to secure approval of the package. In reviewing projects, the Incentives Committee uses the underwriting of the participating bank.
5. **Revitalization Incentives:** The U.S. Route 1 Revitalization Loan program is in place with many local banks participating in providing below market rates on loans to companies in this important corridor. As the revitalization of the U.S. Route 1 Corridor continues to evolve, the Authority should recommend criteria for using new and existing financial incentive programs in other redevelopment districts. Lessons learned in the Route 1 program can be applied to other transportation corridors as well as in village centers and older business districts.

The redevelopment of Downtown Columbia should command a fresh new look at real estate tax credits, tax increment financing districts and other creative ways to stimulate business development and the creation of jobs in Howard County.

Action Agenda

As a result of this strategic plan, the Howard County Economic Development Authority assumes responsibility for an action agenda. This agenda includes all the strategies contained within this plan as well as the development of additional reports, periodic information gathering, specific tasks related to each of the four themes and performance measurement.

In the spring of each year, the Authority Board of Directors will conduct a planning retreat that will have as its primary focus:

1. A review of progress on this plan to date.
2. The development of an annual program of work for the Authority that identifies the specific steps needed to take to keep the plan on target.

Key to this annual review is progress on the 5 major issues identified in the Executive Summary of this plan and elaborated throughout. These are:

- **Fort Meade Growth:** We must develop marketing strategies to maximize the positive benefits of job and tax base growth generated by the massive investment of federal dollars in the Base Realignment and Cyber Command initiatives at Fort Meade. At the same time, Howard County and the region must continue to plan for the concurrent demands that will be made on regional roads and other infrastructure, schools and other public services.
- **Downtown Columbia Revitalization:** Like growth at Fort Meade, the proposal to redevelop a significant portion of Downtown Columbia poses both challenges and opportunities. The Authority will develop marketing strategies, financing tools and other initiatives to bring new businesses and investment into the evolving community. Community leaders must maintain their focus on ways to logically and systematically accommodate this growth.
- **Redevelopment Approach to Existing Business Parks:** Many of Howard County's older employment areas are also in need of revitalization. By embracing new approaches to building heights and densities, these areas can be transformed into exciting new centers of economic activity. With the next General Plan to be developed in the months ahead, this concept should be a center point of the development of the new General Plan.

It would be beneficial to this dialogue to study the range of opportunity between what current land use policies allow, and what appropriate new building heights and density could generate.

- **Branding Howard County as a Top Global Technology Center:** Before new marketing programs can be initiated, before promotional products can be produced, Howard County must conduct a formal branding process. With the economic environment being changed by Fort Meade growth, new technologies and innovation, changes in the workplace and in individual lifestyles, and to compete in an increasingly global marketplace, Howard County's image and message should be crisp and clear.

The Economic Development Authority will develop and implement a comprehensive branding effort for Howard County to establish a distinct and readily identifiable research and technology brand in the local, national and global marketplace.

- ***Efficient Local and Regional Transportation:*** To ensure an adequate workforce for Howard County employers, and to maintain quality of life, developing creative and successful solutions to local and regional transportation issues must become a top priority. In recognition of this, the County executive convened a Transportation Commission in 2010. This plan supports the recommendations of the Commission and encourages continued emphasis on strengthening local and regional transportation solutions.



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