Our business community has celebrated monumental successes and faced great challenges this past year. We continue to see the reinvention of Downtown Columbia move forward as well as major projects in both Maple Lawn and Annapolis Junction that will support the next generation of businesses in Howard County.

Some of last year’s greatest successes were born as the result of a tragic flood that devastated Old Ellicott City, one of Howard County’s most iconic business districts. When the waters rose on July 30, 2016 and impacted the 104 businesses along Main Street, I knew that it would be an incredible undertaking to rebuild and reopen the district. But we are fortunate in Howard County to be surrounded by tremendous leadership and talent across the county’s departments. County staff jumped into action immediately, joining the merchants, residents and volunteers as we worked around the clock to save our town.

Leading the response and recovery for the small businesses in Ellicott City was our Howard County Economic Development Authority team. Thanks to their leadership, guidance and tireless work, we’ve seen the return of 94% of the businesses impacted along with another 20 new businesses joining the community. This type of turnaround is unprecedented following a disaster and I know a great deal of that was thanks to the HCEDA’s tireless efforts.

I also believe it is important to never stop looking forward to the future of business in Howard County. Earlier this year, I joined the HCEDA to announce the creation of an innovation district in Columbia Gateway and I authorized the relocation of the HCEDA’s Maryland Center for Entrepreneurship into this district. These projects will help enable businesses and entrepreneurs the opportunities to start and grow their businesses right here in Howard County.

I am pleased to work alongside this team through the good times and the bad, but our work is not done. I look forward to launching more initiatives and celebrating even more accomplishments in the upcoming year as we keep our business community moving forward.

Sincerely,

ALLAN H. KITTLEMAN
Howard County Executive

HCEDA. LEADING THE WAY.

As the premier business destination in the State of Maryland, Howard County’s business ecosystem is creative, collaborative, and competitive. We at the Howard County Economic Development Authority are inspired to transform economic development by building on the success of yesterday and continually innovating for tomorrow. By taking bold steps, we not only help businesses start and thrive in Howard County, but work to broaden our impact to enhance the entire community.

Looking back, we could not be more pleased with the performance of the Howard County Economic Development Authority team this past year. Every opportunity and challenge we faced, we faced together, as an organization with unbounding support throughout county government.

Collectively, we united to face the Ellicott City flood, playing a key role in the response and recovery effort. HCEDA’s participation and assistance played a significant part in facilitating the rebuilding of Ellicott City and the recovery of businesses located in the flood area. There is little doubt that this was our most time intensive economic development project in the last year, and may be for years to come.

While the flood dominated a tremendous amount of resources and time, our business development team and the team at the Maryland Center for Entrepreneurship continued their mission to serve businesses across Howard County. The HCEDA was proud to contribute to the success of another company that graduated from the Maryland Center for Entrepreneurship and to play a role in the creation and retention of jobs through projects like Pepsi, Freshly, ELTA North America, and A-Safe. As the Howard County business community continues to grow, the HCEDA continues to serve and support them along the way.

Over the past year, the HCEDA has also developed a new five-year strategic plan which was launched in conjunction with the start of the 2018 fiscal year. With input from the team at the HCEDA, industry leading experts, and business executives representing a broad cross-section of the business community, we constructed a strategic plan that will enable the HCEDA to grow alongside the business community. Through an intensive deliberative process, the strategic plan was narrowed down to four main pillars to guide the HCEDA to grow alongside the business community: (i) lead with robust business retention and expansion; (ii) cultivate strategic business attraction opportunities; (iii) unleash the potential of innovation; and (iv) prioritize research and messaging. We believe that these are the priorities needed to grow Howard County’s economy for years to come.

Development in Howard County remains brisk as we continue to see high demand for space and increased investment in the county. The Downtown Columbia redevelopment project continues to remain in high gear with the completion of both One Merriweather and Two Merriweather and Maple Lawn continues to add commercial space as more top companies establish their offices there.

Earlier this year, in cooperation with County Executive Kittleman, the HCEDA launched the next significant initiative for Howard County, the reinvention of the Columbia Gateway Business Community. We are eager to work together on the next great economic development driver for Howard County by transforming this corporate community into an Innovation District. A significant anchor to these efforts will be the creation of an innovation center where the HCEDA’s business incubator, the Maryland Center for Entrepreneurship, will be relocated. Innovation, entrepreneurship and small business continue to be the driver of economies, and we believe that these actions will further cement Howard County as a great place for small businesses.

As development in the county remains robust and the unemployment rate remains low, we know that many more business projects will be forthcoming this year. We look forward to continuing our mission to serve the Howard County community.

All the best,

LAWRENCE F. TWELE
CEO
Howard County Economic Development Authority

JOSEPH J. MEZZANOTTE
Chairman
HCEDA Board of Directors

2017 HCEDA Annual Report // PAGE 3
HCEDA serves as a catalyst for economic growth and stability in Howard County. We’re proud to have been a part of these business development projects over the past year.

PEPSI Bottling Group, LLC, operated as Pepsi Beverage Company and its affiliate Rolling Frito-Lay Sales, LP, has expanded its operations and created a new automated distribution center for Pepsi Beverage Company here in Howard County. The Bottling Group, LLC has invested $35 million and added 251 employees to their existing 252.

FRESHLY INC. Freshly is a manufacturer and distributor of “ready-to-eat” meals who have established their east coast headquarters by leasing 171,000 square feet in Savage, Maryland. They will invest $24 million in capital improvements and generate at least 500 permanent jobs for the county.

NAVA NAVA Health & Vitality Center of Columbia provides a novel integrated approach to manage some of the most prevalent health issues. NAVA received a $250,000 VLT loan for working capital from the Howard County Economic Development Authority, which funded a portion of the growth and expansion of regional NAVA vitality centers and retained 40 jobs. NAVA Health is planning a total capital investment of $1.5 million.

CANTWELL CLEARY Elkridge-based company Cantwell Cleary moved into a 93,000 square foot space with the advice of the Howard County Economic Development Authority. They have 58 employees and spent $6 million in capital investment. The HCEDA provided them with real estate and financing information to assist in their relocation to Howard County.

TEAMWORX Cybersecurity firm TeamWorx has transferred from the Johns Hopkins APL in late 2016 into the Maryland Center for Entrepreneurship with the assistance of the Howard County Economic Development Authority. TeamWorx has received a Catalyst VLT loan from the HCEDA and commercial partnering to support growth. The company currently has four employees and seeks to employ more in the next fiscal year.

A-SAFE A-Safe is a UK-based international manufacturer of fixed, polymer safety barriers. With the assistance of the Howard County Economic Development, the company recently relocated to Elkridge and unveiled its new 30,000 square foot North American headquarters and distribution center. Seventeen jobs were created in the process.

LEADCLOUD LLC Ellicott City based LeadCloud LLC is a data integration platform in the marketing industry, connecting large advertisers to all of the online marketing partners. The Howard County Economic Development Authority approved LeadCloud for a $150K VLT loan to finance their sustained growth of their Integration Platform as a Service (IPaaS).

BTS SOFTWARE SOLUTIONS BTS Software Solutions, based in Columbia, continues to expand following a $150K VLT loan. These funds directly assisted them in their rapid growth in federal contract awards and helped them to spin off a commercial technology company. BTS currently employs 40 people and should be close to 50 by the end of the calendar year.

"HCEDA has been critical for BTS’s growth over the past three years. Their strategic partnership has helped us retain and grow over 80 high tech jobs and spin out our speech-to-text technology, Verb8tm, as a commercial services company. The leadership and team at HCEDA are part of our inner circle. They continue to actively support our growth into new markets, build partnerships with fellow Howard County companies, and provide opportunities to meaningfully engage with our community."

– David W. Tohn, CEO, BTS Software Solutions

BUSINESS DEVELOPMENT BY THE NUMBERS:

- 61 PROJECTS IN FY 17
- CONTRIBUTED TO $29M IN CAPITAL INVESTMENT
- CREATED 1,500 NEW JOBS AND RETAINED 546 JOBS
- 544,649 SF IMPACTED

PHOTOS (counterclockwise from top left): Lutheran Village at Miller’s Grant, Town Grill at Foster’s Country Store, and RegionAle ribbon-cutting ceremonies

PHOTOS: A Safe ribbon-cutting ceremony and One Menawater
Innovation is alive and well in Howard County. The Maryland Center for Entrepreneurship (MCE) is a hot spot in Howard County for people looking to grow great ideas into viable companies. The HCEDA’s Catalyst Loan Fund has become a great source of capital support for the development and growth of the small business economy in the county.

MARYLAND CENTER FOR ENTREPRENEURSHIP
An initiative of the HCEDA, the MCE provides business programming and services to help turn people with bright ideas into successful companies. With over 12,000 sq. ft. of workspace, the MCE houses 23 startup companies under one roof to assist in accelerating their growth.

MCE and several of their companies celebrated milestones over the past year:
• VitusVet, an MCE resident company, had another successful year growing and expanding their veterinary service business, reaching a new milestone of growth with over 25 million pet records. VitusVet was named “Best Technology Company” at the Maryland Incubator Company of the Year Awards.
• In response to continued growth, MCE resident company Vheda Health graduated out of the incubator and into a larger facility in Columbia. Vheda Health began at the MCE with two employees, but has grown to employ 25.
• The Maryland Center for Entrepreneurship launched a new and expanding menu of programs for resident and affiliate companies. Founded around the pillars of education and community, included are a monthly marketing program, TEDCO information sessions, educational programs, and community happy hours.

"We are continually impressed with the immense opportunities for growing companies at the MCE, from educational services to vital resources for collaboration and development. MCE introduces entrepreneurs to a world of valuable resources, supported by a diverse team of knowledgeable counselors and mentors."

– Tim Buckley, Executive VP, RFID Ready

CATALYST LOAN FUND
The Catalyst Loan Fund, operated by the HCEDA, is focused on small, minority- and woman-owned business initiatives. The fund is a locally managed source of capital, with loans from $25,000 to $250,000 to finance expanding businesses whose projects will create permanent jobs and leverage private-sector investment. Loan proceeds may be used for normal business uses such as working capital, tenant improvements, equipment purchases, real estate purchases, franchise fees, and inventory purchases.

CATALYST LOAN FUND FY 17 BY THE NUMBERS:
15 LOANS APPROVED
$2.3M IN FUNDS DISTRIBUTED
47% OF LOANS APPROVED WERE GIVEN TO WOMEN-, MINORITY- OR VETERAN-OWNED SMALL BUSINESSES
123 PROJECTED NEW JOBS
136 JOBS RETAINED

GATEWAY INNOVATION DISTRICT
Located at the intersection of I-95 and Rt. 175, midway between Washington and Baltimore, Columbia Gateway is home to over 400 businesses, employing approximately 10,000+ people. The park combined with neighboring Gateway Commerce Center is 920 acres with a total of 8.1 million sq. ft. of commercial space.

Under County Executive Allan Kittleman’s new vision and the direction of the HCEDA, the business park would be turned into an innovation district, where leading-edge companies work with anchor educational institutions and startups to collaborate on new technologies and services. Creative connections would be fostered with more compact, wired, and transit rich development patterns. Innovation Districts are an economic development model that has emerged not only in the United States, but around the world.

The development of the plan will be driven by property owners and businesses in Columbia Gateway and coordinated by the Howard County Economic Development Authority. For the near term, the plan will include community based programming to help create connections between the employees in Columbia Gateway. Over the longer term, new land uses, infrastructure and transportation improvements would also be assessed as part of the future vision.

HOWARD COUNTY INNOVATION CENTER
As part of the new vision for the Gateway Innovation District, County Executive Kittleman announced the relocation of the Maryland Center for Entrepreneurship to the county owned building located at 6751 Columbia Gateway Drive. The MCE and HCEDA will occupy the third through fifth floors in the new Innovation Center.
“The Howard County Economic Development Authority has been a strong advocate of the work that TRRC has been doing. From the approval of a $45,000 Catalyst Loan to a $4,000 agricultural innovation grant, their support has been paramount in receiving a matching $75,000 grant and bringing our new indoor sensory sensitive riding arena to life.”

– Helen Tuel, Founding Director, Therapeutic and Recreational Riding Center, Inc. (TRRC), Glenwood, MD

PHOTO: Produce being sold at Clark’s Elioak Farm

Farming and Agriculture has an important historic and economic role in Howard County. Landscape, nursery, and greenhouse is the fastest growing agriculture sector in the county.

AGRICULTURE EDUCATION
Through a partnership with the Howard County Applications and Research Laboratory (ARL), the Howard County Farm Bureau, and High School student Ellie Feaga, the HCEDA and was successful in integrating an agriculture education program back into the Howard County Public School Systems program. Beginning in Fall 2018, the CASE program (short for Curriculum of Agriculture, Science and Education) will help students learn about farming and the skills needed to join the industry.

HARVEST MAGAZINE
The HCEDA and Howard County Tourism partnered on the publication of the second “Harvest” magazine this year. With 20,000 copies of the publication produced, it is aimed at increasing awareness of different agritourism opportunities and ways for residents to engage and support local farms all year long.

AGRICULTURE AND FARMING INNOVATION

HOWARD COUNTY AGRICULTURE BY THE NUMBERS:

- 300 FARMS
- 38,000 ACRES
- $32M IN FARM PRODUCTS
- 6 FARMERS MARKETS
- 28% FARMS OWNED/OPERATED BY WOMEN
Business owners agree that Howard County is not just a spot in which you rent space. When you own a business here, you are part of a collective. Strong business organizations like the HCEDA’s own Maryland Center for Entrepreneurship (MCE) and Howard Tech Council (HTC), the Howard County Chamber of Commerce, Leadership Howard County, the Small Business Development Center, and SCORE are each dedicated to helping connect businesses. Opportunities are plentiful to create relationships and grow your company.

The HCEDA, MCE, and the Howard Tech Council held over 50 events in FY17, serving over 3,036 members of the community. These programs included nine events that brought together over 200 executives to facilitate high-level connections among CEOs and executives in the business community.

Small business is the backbone of the local economy in Howard County. 82% of our 9,900+ businesses have fewer than 20 employees.

The Howard Tech Council, a cornerstone component of the HCEDA, continues to boast an active, engaged membership that spans a variety of industries. Membership grew to 260 companies this year, with 60 percent identifying as technology companies. In addition to monthly networking and educational events, HTC manages affinity groups for cyber, women in tech, sales and marketing professionals, B2G executives, health technology innovators, and C-level leaders who meet regularly to exchange ideas, monitor trends, and celebrate progress.

Working with Howard Community College and the Howard County Public Schools System, the HTC doubled its intern program, helping to place students with startups and small businesses in Howard County.

“Howard Tech Council provides exceptional opportunities for networking among the best of the best tech companies in the area. Further, their educational and professional development programming are unparalleled in the area. The HTC is a rewarding, engaging, and supportive organization for everyone and every company it serves.”

– Anna Elhini, President of Creatix

3,036 BUSINESS participants attended HCEDA, MCE, and HTC events in FY16

260+ COMPANIES are members of the Howard Tech Council
IN THE HEART OF MARYLAND

Situated in the heart of Maryland, Howard County is an ideal location to live, work, and grow a business. With Baltimore 30 minutes to the north and Washington, D.C. 40 minutes south, the county is situated along the corridor between two of the top 30 largest cities in the U.S. Proximity to an unparalleled set of federal agencies and research universities provides access to the latest scientific and technical developments, while furnishing educated employees to top employers.

DRIVING TIME TO MAJOR CITIES:

<table>
<thead>
<tr>
<th>City</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philadelphia</td>
<td>2 Hours</td>
</tr>
<tr>
<td>New York</td>
<td>3 Hours</td>
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<tr>
<td>Richmond</td>
<td>2.5 Hours</td>
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<tr>
<td>Wilmington</td>
<td>1.5 Hours</td>
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<tr>
<td>Harrisburg</td>
<td>1.5 Hours</td>
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<tr>
<td>Pittsburgh</td>
<td>4 Hours</td>
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CONVENIENT TO MANY FEDERAL AGENCIES INCLUDING:

- National Security Agency
- Fort Meade
- National Institute of Standards and Technology
- Centers for Medicare & Medicaid Services

Major highways and local connectors support efficient road travel and transport across and beyond Howard County. Maryland Area Regional Commuter (MARC) buses and trains – and nearby Amtrak and freight lines – deliver passengers and cargo to regional destinations. International shipping and cruise ships are accessible via the Port of Baltimore, ranked among the nation’s most efficient ports. Three international airports within 30 miles of Howard County round out a robust infrastructure, providing easy access to and from the region, nation, and the world.

One hour to Frederick, 30 minutes to Baltimore, half an hour to Annapolis, and 40 minutes to Washington, D.C.

Columbia was ranked NUMBER ONE in Money Magazine’s 2016 “Best Places to Live”

PHOTO: Lakefront Columbia
THRIVING BUSINESS DISTRICTS

LOCATION IS EVERYTHING

Howard County’s seven business districts reflect a diversity of industries that helps to make a well-rounded and thriving business community.

COLUMBIA

From its radical inception in 1967 as a 14,000-acre planned community, Columbia has consistently been home to innovators and forward-thinking individuals. Valued for its social and economic diversity, Columbia was also ranked number one in Money Magazine’s 2016 “Best Place to Live” and celebrated its 50th anniversary this year.

Columbia Gateway

The premier business park along the Baltimore-Washington Corridor, Columbia Gateway is home to major cyber, technology, defense, and healthcare companies. HCEDA and County Executive Kittleman have slated this “Innovation District” as a major redevelopment initiative, integrating new mixed-use space, amenities, and transportation upgrades.

Downtown Columbia

Development in Downtown Columbia remains brisk. The new Crescent Project is underway and will deliver major residential, retail, and office developments. Modifications to Merriweather Post Pavilion are expected to attract more large acts to this celebrated outdoor music venue. Nearby, the Little Patuxent Square Project opened bringing new apartments, office space, and retail space online.

ELLIOTT CITY

With its roots in milling and manufacturing, Ellicott City is the picturesque home to many historic sites, unique shops, and distinctive dining, and serves as the seat for Howard County Government.

Route 40

The Route 40 corridor connects Ellicott City to Baltimore, with services, shops and restaurants spanning the length. Several recent projects have brought new business, and housing along the corridor.

Old Ellicott City Business District

Old Ellicott City is the cherished Main Street of the town, loved for its quaint charm, eclectic shops and restaurants, and friendly, small-town feel. On July 30, 2017, a flash flood hit Historic Ellicott City, impacting 104 businesses and property owners and approximately 955 workers. The HCEDA stepped in as the interface with business and property owners to assist with the recovery process. A year later, 94% of the businesses have reopened their doors.

MAPLE LAWN

Maple Lawn was founded in 2005 as a mixed-use community in Fulton, and built on a planning philosophy that celebrates distinctive, prosperous small towns with a sense of community. Maple Lawn is home to five residential neighborhoods, nine multi-story buildings, five single-story flex buildings totaling 210,100 SF, and retail shops along its streets. St. John Properties recently completed a 104,000 SF office building with another 102,000 SF office building and a 30,000 SF medical office to deliver in 2018. A 103 room Residence Inn is also being built and will be completed in Summer 2018.

WESTERN HOWARD COUNTY

Western Howard County is designated as the Rural Residential and Rural Conservation area of Howard County. Agriculture accounts for the primary use of land; with small businesses and homes interspersed throughout. Interest in Howard County’s craft brewing and farm-to-table movement has sparked growth for the farms in this region.

PHOTOS (from left): Forest Green in Ellicott City, Old Ellicott City, Maple Lawn/Fulton, Columbia Gateway Drive, and Western Howard County.
On Saturday, July 30, 2016, Old Ellicott City experienced a one in a thousand-year rainstorm which dropped six inches of water in a two-hour period. The rain gathered in the upstream watershed and funneled through this historic mill town bringing a 6-foot wall of water with it, leaving a wake of destruction.

The HCEDA worked with building and business owners as well as the Howard County Government to assist in gaining access to facilities, navigating the permits and licensing process, and locating external real estate for temporary or permanent relocation. Many companies also required financial assistance to cover damages and rebuilding efforts, so the HCEDA employed its Catalyst Loan Fund program to help a handful of affected businesses get back on their feet and provided business counseling to others to help them navigate their financial options.

To maintain long term involvement in the recovery the HCEDA leased and rehabbed a building in the downtown area, turning it into a business resource center and gathering place. Named Millworks in honor of the towns milling history, they placed one full time business development specialist in the center to provide long term continued assistance.

For their work in Ellicott City, the HCEDA received a Small Business Administration (SBA) award, a Maryland Economic Development Association (MEDA) Award, and an International Economic Development Council (IEDC) Silver Award. Two HCEDA staff members were nominated by the community and recognized for excellence by Governor Larry Hogan and County Executive Kittleman for their roles in the response and recovery.

A year later 98 of the 104 flooded businesses have reopened their doors, a 94% reopening rate.
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PHOTO: Business owners meet at a CEO Breakfast