

COOPERATIVE FORECASTING GROUP

February 22, 2023

Hybrid Meeting

10:05 A.M. to 11:25 A.M.

MINUTES

Ms. Deborah Price, Harford County, called the meeting to order at 10:05 A.M.

1. APPROVAL OF MINUTES

Mr. Jeff Bronow, Howard County, moved to approve the minutes from the December meeting of the Cooperative Forecasting Group (CFG), with Ms. Kathleen Comber, Carroll County, seconding the motion. The minutes were unanimously approved.

2. METHODS FOR CALCULATING HOLDING CAPACITY / LAND USE POTENTIAL: BALTIMORE CITY

Ms. Jamie Williams, Baltimore City Department of Planning, provided a presentation on the methods utilized in calculating holding capacity in Baltimore City. A holding capacity analysis provides an estimate of the amount of development that can be accommodated in an area, with consideration given to applicable land-use policies and regulations and environmental constraints. Baltimore City defines holding capacity as the potential number of future housing units that could be built on vacant and underutilized land, based on current zoning. They do a holding capacity analysis every three years.

Baltimore City uses spatial analysis to identify land suitable for development and determine the maximum units allowed on these properties. A key component of the analysis is the identification of vacant and underutilized properties. Vacant properties are described as having no visible structures, a 'vacant' land use code, no assessment record of improvements, or recent or planned demolition. Underutilized properties include downtown surface parking, residential structures with a vacant building notice, and properties on block faces with more than 70% vacant structures/lots.

Ms. Williams said that in order to create a spatial dataset of developable properties, one must first eliminate those that are undevelopable. Undevelopable properties include land where the slope is too steep, resource conservation areas, floodways, right-of-ways (utility or rail, for

example), recreation centers, community managed open space (playgrounds) and non-residential zoning (including open space, hospital, education campus and industrial). Ms. Williams estimated that undevelopable land comprises approximately 10% of Baltimore City land.

Next, Ms. Williams assigns data on the characteristics of the remaining properties, including information on vacant lots and vacant building notices, zoning, land use codes, demolition permits, building permits, use and occupancy permits, and recent subdivisions or development projects. Then Ms. Williams uses the information to categorize each property as utilized, underutilized, or vacant. She then compares the properties categorized as vacant lots to building permits and use permits to verify vacancy. Ms. Williams also uses aerial imagery to remove slivers of property that are not possible to develop.

To create capacity estimates, Ms. Williams assigns a yield factor based on zoning categories, and then calculates the capacity of each lot (yield * acres). Then Ms. Williams summarizes the vacant and underutilized lots by zoning category, transportation analysis zone, housing market typology, census tract and block group, and neighborhood statistical area. The final products of the holding capacity analysis include a Summary Report of Yields (detailing properties, acreage, and capacity per zone) and a map of residential development capacity by census tract (print and online). These analyses are submitted as part of the State Annual Report.

Ms. Williams said that aside from its use in the forecasting process, Baltimore City utilizes the information from their residential holding capacity analyses in their master plan updates, and to inform review of proposed development.

Jennifer Duffy, Baltimore Development Corporation, commented that they just started a similar analysis looking at vacant nonresidential properties and corridors.

Mr. Rick Fisher, Anne Arundel County, asked if a GIS model was used in the process. Ms. Williams said they do the work entirely in GIS, but they do not use a model because much of the work requires manual adjustment.

[PowerPoint: Baltimore City Planning - Development Capacity 2020]

3. UPDATE ON UPWP TASK

Mr. Shawn Kimberly, BMC, provided a timeline of the UPWP public review and approval schedule.

- February 8th – Begin 30-day review
- March 9th – Deadline for public comments
- March 28th – Present comments to BRTB
- April 21st – BRTB votes

- July 1st – Work program can begin

Mr. Kimberly said that the task proposed by the CFG (“Future Trends: Employment, Commercial Real Estate, and Housing Location Choice”) is included in the draft UPWP, and that it is being combined with another related project, “Regional Workers’ Travel Choices.” The decision to combine them was made because the topics are closely related, and the quality of the CFG task stands to directly benefit from the output of the travel choices project. Both tasks are intended to gain a better understanding of the impacts of recent changes in the proliferation of work from home, adjustments to commercial estate trends (including shifts in the retail industry and office space utilization), and changes to home location choice decisions. The tasks are to be performed sequentially and by the same consultant team.

The purpose of the “Regional Workers’ Travel Choices” project is to establish a data collection program to better understand workers’ travel choices and patterns. The selected consultant will design and distribute a survey to regional households and collect basic household characteristics and detailed household labor force travel and location choices. For example, details on commute travel, work location (home or office), home location and day of the week flexibility for current day and for pre-pandemic times. The deliverables for the “Regional Workers’ Travel Choices” project will be the survey design, data on commuter travel choices and location and a multivariable statistical analysis on commuter travel choices and locations with person/household demographic characteristics.

“Regional Workers’ Travel Choices” focuses on understanding the underlying implications of the changes on commuting patterns and travel, while “Future Trends: Employment, Commercial Real Estate, and Housing Location Choice” focuses on how the changes might influence land use planning and inform assumptions that contribute to the development of the cooperative forecasts. These tasks complement each other in that the results of the “Regional Workers’ Travel Choices” survey can serve as inputs for the analysis in the “Future Trends: Employment, Commercial Real Estate, and Housing Location Choice” task.

BMC staff will draft a Request for Proposal (RFP) in March and April 2023. The RFP will be distributed to CFG members on April 19, 2023. CFG members will have an opportunity to comment on the draft RFP at the April 26 meeting of the group. While a final schedule has not yet been set, the RFP could open in early May and close in late June. The review process and consultant selection could both occur in July 2023 – as time and schedules permit. The task would then kick off in late summer and consist of two phases, each estimated at about six months in duration. Phase 1 consists of employer-based and employee-based surveys designed to understand regional workers’ travel choices. Phase 2 consists of analyzing future trends in employment, commercial real estate, and housing location choice, and explaining the implications upon the economy, downtowns, housing and transportation. Based upon the draft schedule described, the final report and presentations would be expected in August and September 2024.

Mr. Bronow, Howard County, asked why the consultant selection period is just one month. Mr. Kimberly said that the schedule provided is in draft form, and is meant to give a general sense of timing for each task. If more time is required for consultant selection, it can be taken.

Mr. Todd Lang, BMC, said that the original estimate for “Future Trends: Employment, Commercial Real Estate, and Housing Location Choice” task was \$300,000. The “Regional Workers’ Travel Choices” task was estimated at \$150,000. Those two values combined to \$450,000 for the merged task. Mr. Lang mentioned that there is also interest from the business community in this information.

4. DISCUSSION ON TIMING OF NEXT FORECAST UPDATE

Mr. Shawn Kimberly opened a conversation on the timing and plans for an update to the Round 10 cooperative forecasts, and explained the difference between a ‘Round’ and a ‘Round Update’.

Forecast *Rounds* are developed as needed, but work generally coincides with the release of major updates to supporting data (including the decennial census), when multiple jurisdictions complete updates to their comprehensive plans, or if there is an update to the Master Establishment File. Participation in a *Round* is required for all jurisdictions. Forecast rounds are labeled with a number (no letter).

Each year, CFG members have an opportunity to account for new or unanticipated changes in population, households, and/or employment, even when a new complete round of socioeconomic forecasts is not warranted. These *Round Updates*, are optional and do not require participation of all CFG members. If a jurisdiction chooses not to participate, the data from the most recently adopted cooperative forecasts are simply forwarded for inclusion in the round update. Round updates are labeled with a number and letter.

Data for rounds and round updates are generally submitted toward the end of calendar years. Mr. Kimberly asked if group members knew at this point whether they planned to update their Round 10 forecasts later this year (sometime after the Long Range Transportation Plan (LRTP), *Resilience 2050*, is adopted – anticipated in July 2023). Before going around the virtual table, he added that the question was meant only to get a sense of potential participation, and not as a final decision.

- Anne Arundel County (Rick Fisher): Will speak with colleagues and check in at the next meeting. Initially thinking yes, would submit an update.
- Baltimore City (Jamie Williams): No update anticipated.
- Carroll County (Kathleen Comber): Will speak with colleagues and check in at the next meeting.
- Harford County (Deborah Price): No update anticipated.
- Howard County (Jeff Bronow): No update anticipated in 2023. May update in 2024, after the new general plan is finalized.
- Queen Anne’s County (Steve Cohoon): No update anticipated.

To get a sense of when the CFG may want to develop a new *round* of forecasts, Mr. Kimberly asked about the timing of updates to member jurisdiction comprehensive plans and discussed scheduling for the LRTP. He noted that the latest LRTP (Resilience 2050) is in development, and adoption is anticipated in July 2023. The next LRTP is expected in 2027. Mr. Kimberly said that in order for the 2027 LRTP to be on schedule, the supporting cooperative forecasts would need to be adopted a year ahead of time, in 2026. He added that adhering to this timeline would mean that member jurisdictions would likely need to start work on the LRTP supporting forecasts in 2025. Sometime prior to that (perhaps in 2024), the CFG may want to begin work on updating the Master Establishment File, as it helps inform employment allocation and model input development.

5. NEW BUSINESS

We are seeking a volunteer for a member presentation at the next CFG meeting.

The next CFG meeting will be held Wednesday, April 26. The meeting format will be hybrid. Members can attend the meeting virtually or in person.

The meeting adjourned at 11:25 A.M.

ATTENDANCE

Members

Jeff Bronow, Howard County Department of Planning and Zoning
Steve Cohoon, Queen Anne's County Department of Planning and Zoning
Kathleen Comber, Carroll County Department of Planning
Rick Fisher, Anne Arundel County Department of Planning and Zoning
Deborah Price, Harford County Department of Planning and Zoning
James Wilkerson, Howard County Department of Planning and Zoning
Jamie Williams, Baltimore City Department of Planning

Staff and Guests

Charles Baber, BMC
Jennifer Duffy, Baltimore Development Corporation
Blake Fisher, BMC
Shawn Kimberly, BMC
Todd Lang, BMC
Crystal McDermott, BMC