

COOPERATIVE FORECASTING GROUP

October 25, 2023
10:00 A.M. to 12:00 P.M.

MINUTES

Mr. Steve Cohoon, Queen Anne's County, called the meeting to order at 10:02 A.M.

Mr. Shawn Kimberly said that Ms. Deborah Price is leaving Harford County government, and that she is no longer the chair of the Cooperative Forecasting Group (CFG). Queen Anne's County (Mr. Cohoon) is next in the group's leadership rotation, and is now serving as chair of the CFG with Anne Arundel County (Mr. Rick Fisher) serving as vice-chair.

1. APPROVAL OF MINUTES

Mr. Cohoon asked for approval of the minutes from the August 23, 2023 meeting of the CFG. Ms. Kathleen Comber, Carroll County, moved to approve the minutes with Jamie Williams, Baltimore City, seconding the motion. The minutes were unanimously approved.

2. METHODS FOR CALCULATING HOLDING CAPACITY / LAND USE POTENTIAL: HOWARD COUNTY

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. While this type of analysis is performed in most long-range planning efforts, methods may vary by jurisdiction. Mr. James Wilkerson, Howard County Department of Planning and Zoning, provided a presentation on the methods utilized in calculating holding capacity in Howard County.

Mr. Wilkerson said that the two most important questions Howard County seeks to answer with the holding capacity analysis are regarding where there is capacity for future growth, and how much growth can be facilitated. The capacity for growth comes from undeveloped land parcels and underutilized land parcels that have space for additional development, per zoning regulations. The information from the holding capacity analysis is used by Howard County in a variety of ways including the community and master planning processes, school enrollment projections and redistricting decisions, and in the cooperative forecasting process.

The analysis utilizes Howard County's Land Use Data and Development Monitoring Database (Land Use 2.0) which contains information that dates back over half a century and has transitioned through several generations of storage and display. When Mr. Wilkerson

assumed responsibility for the database in 2019 and migrated it to its current format in ArcGIS Pro, he automated significant portions of the update and maintenance procedures, and overhauled the attribution and geometry of the data.

Land Use 2.0 takes the existing inventory of parcels with associated activities (such as development plans and building permits) and modifies the attributes of the parcel data as the plans and permits are approved, and parcel geometry is updated from CAD data submitted with development plans. Mr. Wilkerson said because Land Use 2.0 integrates with the development plan and building permit data, county staff can determine the actual inventory of built and pending development at any given time. Non-residential development is recorded in acres, while residential development is recorded in acres and housing units. Additionally, Howard County obtains residential unit types (SFD, SFA, MF, MH) from plans and permits, and the zoning and plan development data informs estimates for undeveloped land.

When there is a plan submitted for new development, several changes take place in the database.

- Land use code changes (as needed)
- Project footprint changes (results in new parcel boundary)
- Units and Acres are recalculated

Attribute and boundary progression is tracked through five stages of development with plan and permitting data. The five stages are:

- Undeveloped – No existing use and no plans
- In-process – Site plan approved
- Unbuilt – Record plats approved
- Permit – Construction permit issued
- Existing – Use and Occupancy permit issued

The maintenance of these attributes help to inform estimates for phasing of development activity.

To integrate and process plat records into Land Use 2.0, Mr. Wilkerson uses a series of GIS tools and models. The information from the plats help generate the lot lines and address points, which are later used to update the County's land use parcel data after review is complete.

Mr. Wilkerson also uses Land Use 2.0 models to process building permit data. The permits are geocoded, and the attributes are formatted for incorporation into the land use files. The permit points are used to flag parcels in transition, and to update the attribute information in the land use files. The building permit data is then stored in an archive containing geocoded permits going back to 1992.

In support of Howard County's general plan, Mr. Wilkerson utilized Community Viz to assist in the development of land use and growth forecasts. With this application, users can adjust parameters to test how specified modifications affect the growth estimates and forecasts.

Users can determine carrying capacity, perform land suitability analyses, establish development status, and model future growth allocations.

Mr. Wilkerson highlighted the fact that the amount of undeveloped land in the county has decreased dramatically in the past 30 years. In 1994, approximately 61,000 acres of land in Howard County (about 38% of the total) was considered undeveloped. In 2022, only 11,300 acres of land (7% of the total) remained classified as undeveloped.

Projections developed in 2022 indicate that the county has “new unit potential” of approximately 20,300 units until buildout is reached. Of the county’s five regional planning areas, Columbia captures the greatest share of new unit potential, with about 7,200 units (36% of the county total).

While Howard County’s land use data is updated daily, projections are generally performed annually (or on an as-needed basis). The county displays easily interpreted visualizations of land use and development monitoring activity in the Land Use Master Reporter application. The Land Use Master Reporter is available to Howard County staff, and highlights several pertinent datapoints including the distribution of housing units, building permit activity, and use and occupancy permits.

[PowerPoint: Land Use 2.0: Assessing Land Use Changes and Future Development Potential in Howard County]

3. BRIEFING ON UPDATES TO BMC DATA DASHBOARDS

Mr. Charles Baber, Baltimore Metropolitan Council, provided a presentation on updates to the BMC Demographics Dashboard. He demonstrated the functionality of the dashboard, noting that it is structured around four tabs:

- Employment Status
 - 2020 American Community Survey (ACS) table C23002 (A-I), Population by Gender and Age and Race and Employment Status
- Income
 - 2020 ACS table B19037 (A-I), Households by Age and Income and Race
- Tenure by Race
 - 2020 ACS table B25003 (A-I), Occupied Housing Units by Tenure and Race
- Tenure by Income
 - 2020 ACS table B25118, Occupied Housing Units by Tenure and Income

The data is presented at the tract level of census geography, therefore requiring the use of the 5-year ACS data sets. The geographic coverage of the dashboards includes the Baltimore region (MSA), Frederick County (MD), Montgomery County (MD), Prince Georges County (MD), the District of Columbia, Adams County (PA), and York County (PA).

Mr. Baber demonstrated how the Dashboard works using the Employment Status tab. He showed the CFG how to navigate the map and how to set the geography filters to see

employment data in specific jurisdictions by census tract. The filter selections are also reflected in the five charts below and to the right of the map. The charts include a series of cross-tabulations including employment status by age, sex, and race. Additionally the dashboard has a filter for BMC's vulnerable population index for use with the map and charts.

Mr. Baber told CFG members that BMC would like to update the dashboard as new 5-year datasets are released each December. He added that BMC is interested expanding the topics covered in the dashboard, and asked CFG membership to let him know if there are specific datapoints they would like to see included with future updates.

Mr. Baber also shared the BMC 2010-2020 Census Data - Race & Ethnicity dashboard. BMC completed the Race and Ethnic Prevalence/Diversity analyses in the dashboard using the Census Bureau's redistricting data files (PL 94-171) from 2010 and 2020, and summing block level data to Transportation Analysis Zones (TAZs). The resulting dashboard includes the diversity index, race prevalence, total population, and average household size for each TAZ in the region.

[Demographics Dashboard <https://www.baltometro.org/data/tableau-demo-occupied>, Race and Ethnicity Dashboard <https://www.baltometro.org/data/tableau-census-pl94-171>]

4. UPWP TASK UPDATE

Mr. Shawn Kimberly updated the CFG on the status of the UPWP task "Post-pandemic Trends in Employment, Commercial Real Estate, Housing Location Choice, and Travel Demand", and provided the CFG with preliminary information on the next set of cooperative forecasts.

Mr. Kimberly said that BMC received several proposals for the Post-pandemic Trends project. The review team consisted of CFG members from Howard and Queen Anne's Counties and two BMC staff members. The review team evaluated the proposals, discussed them, reached a consensus, and awarded the project to AECOM, with WBA Research (a Maryland-based Disadvantaged Business Enterprise firm) as a subcontractor. Next, there will be a preliminary meeting to discuss contract details and to set a date for a project kick off meeting sometime in early November.

In preparation for a forthcoming discussion on the timing of the next set of cooperative forecasts, Mr. Kimberly reminded the group of the purpose of the Master Establishment File (MEF). The MEF is an inventory of establishments in the Baltimore region, and is used by CFG membership in their employment allocation process and by BMC staff in the development of model inputs (such as employment by industry by TAZ). The MEF is created through CFG membership review and editing of the confidential point level QCEW file the group has access to via a data sharing agreement with the Maryland Department of Labor.

With the use of aggregate QCEW data on total jobs by jurisdiction, Mr. Kimberly highlighted the affect that the pandemic and associated public health measures had upon jobs in the Baltimore region, and how the region has responded since the pandemic hit in 2020. There was a direct and large-scale impact from February through April 2020 when the region lost

approximately 175,000 jobs (about 13% of total jobs). As of March 2023 the region had added 132,000 jobs, but was still 3.2% short of February 2020 employment levels. By that point, the nation had recaptured the number of jobs lost at the beginning of the pandemic, and had grown further adding 3.6 million jobs (2.4%) beyond February 2020 levels. Maryland is still 22,000 jobs (0.8%) short of February 2020 levels. Understanding the magnitude of these shifts in employment underscores the need for an update to the MEF. An update to the file would equip the CFG membership to better understand changes to the spatial distribution of employment since the onset of the pandemic, and to use this information in the next set of cooperative forecasts.

Mr. Kimberly reminded the CFG that the MEF used in Round 10 development was based on 2nd quarter 2019 QCEW data, and that the group will gain access to 2nd quarter 2023 data in early December of this year. He recommended that the group build-in adequate time in the schedule of the next set of cooperative forecasts to accommodate a MEF update. Mr. Kimberly suggested that the group discuss the timing of the next set of forecasts and MEF update at the next CFG meeting.

Mr. Kimberly provided information for the group to get a sense of the scale of the QCEW review and MEF development task. One of the primary requests of the task is the review of “large employers” (defined here as those with >=100 jobs). The following table shows how many records would be subject to review by each jurisdiction under the large employer guidance (for March 2023).

Jurisdiction Level Summary: Records with >= 100 Jobs, March 2023

Jurisdiction	Counts		Share of Jur	
	Records	Emp	Records	Emp
Anne Arundel	405	126,936	2.2%	49.0%
Baltimore City	528	224,407	3.3%	66.1%
Baltimore County	619	174,777	2.5%	48.4%
Carroll	84	20,529	1.6%	36.0%
Harford	145	46,093	2.1%	48.3%
Howard	293	72,228	2.4%	43.3%
Queen Anne's	18	3,751	1.0%	24.9%
Region	2,092	668,721	2.5%	51.7%

Source: Maryland Department of Labor; Baltimore Metropolitan Council.

Mr. Kimberly asked the CFG if they agree that the MEF should be updated. Mr. Austin Broderick (Baltimore County) and Mr. Cohoon agreed, and no members communicated opposition. Hearing interest in the MEF update task, Mr. Kimberly said that BMC staff would begin work on the geocoding and preparation of the QCEW file upon its release in early December.

[PowerPoint: CFG Updates: UPWP Task & Forecasts]

5. NEW BUSINESS

BMC staff is working on an RFP for a consultant task regarding EV charging in high-density residential areas, where people may not have access to a private garage or driveway to charge cars. Mr. Kimberly asked if CFG membership could assist by providing information on the zoning codes/classifications in each jurisdiction that could be used to identify high-density residential areas.

Mr. Kimberly noted that at the December meeting, he will ask the group how they would like to proceed with the CFG meeting format in calendar year 2024. He noted that the group could alternate between virtual and in person meetings (with a hybrid option for those that cannot come in person).

The next CFG meeting will be held on December 20, 2023. The meeting adjourned at 11:19 A.M.

ATTENDANCE

Members

Austin Broderick, Baltimore County Department of Planning
Steve Cohoon, Queen Anne's County Department of Planning and Zoning
Kathleen Comber, Carroll County Department of Planning
Rick Fisher, Anne Arundel County Office 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
Blake Fisher, BMC
Larysa Salamacha, Baltimore Development Corporation
Shawn Kimberly, BMC
Crystal McDermott, BMC