COOPERATIVE FORECASTING GROUP
Tuesday, December 13, 2016
BALTIMORE METROPOLITAN COUNCIL
Offices@ McHenry Row 1500 Whetstone Way, Suite 300
Baltimore, Maryland 21230
1:00 P.M. to 3:00 P.M.

MINUTES / SUMMARY

Chairperson Margaret Kaii-Ziegler, called the meeting to order at 1:27 P. M.

1. APPROVAL OF THE MINUTES
Kui Zhao moved the approval of the Cooperative Forecasting Group (CFG) minutes of the October 26, 2016 meeting. The motion was seconded by Dan Rooney. The minutes were approved.

2. FORECAST SURVEY SUBCOMMITTEE RECOMMENDATIONS – JEFF BRONOW AND KUI ZHAO
Kui Zhao provided a brief summary of the responses to the forecast survey. The survey was initiated in the 2015. Kui stated that 12 Metropolitan Planning Organizations (MPOs) responded to the survey, and that seven of these completed the survey in its entirety. The 12 MPOs vary by size, from 95,000 in the San Angelo Metropolitan Planning Organization (Texas) to 2.5 million in Maricopa Association of Governments (Arizona). MPOs surveyed develop the forecasts for the local jurisdictions. A top-down forecast methodology, utilizing the development of regional control totals as a first step, was the norm. The respondents develop forecasts every four years per the federal mandate for the long-range transportation plan updates. The MPOs use models to develop the population, household, and employment forecasts and utilize the forecasts in travel demand modeling and other planning functions.

Following Ms. Zhao's summary Jeff Bronow added that the forecast survey subcommittee will provide recommendations and next steps at the February CFG meeting. A brief discussion of top-down forecasting methods, topics such as the timing of the incorporation of potential changes to the CFG's current forecasting process, as well as sources for regional control totals, followed.

3. BASE YEAR EMPLOYMENT ESTIMATES BY JURISDICTION – AL SUNDARA
Mr. Sundara discussed the development of the agreed upon base-year employment estimate methodology utilized by the CFG. He described the sources of the data utilized in the methodology (Bureau of Economic Analysis (BEA) for the wage and salary component and the Census Bureau's Non-employer Statistics for the proprietor component of the total) and presented the results he had

developed for years 2011 through 2014. Mr. Sundara noted that while BMC had acquired the BEA's 2015 data set for the wage and salary portion of the calculation, the Non-employer Statistics for year 2015 were not yet available. Mr. Kimberly described estimates for 2015 proprietors he developed by applying the annual growth rates for each jurisdiction and industry from 2011 through 2014. He combined the simulated 2015 proprietor data with the existing BEA wage and salary data for 2015 to arrive at base year total employment estimates by jurisdiction necessary for the Round 9 forecasts. Mr. Kimberly displayed a series of tables and charts illustrating jurisdictional employment estimates over time derived utilizing the CFG methodology.

[Presentation: Base Year Employment Estimates by Jurisdiction, December 13, 2016]

4. POPULATION AND EMPLOYMENT FORECAST COMPARISONS – SHAWN KIMBERLY

Mr. Kimberly's presentation included comparisons between the Round 8B population and employment forecasts and the forecasts of two private firms, IHS Global and Woods and Poole Economics, as well as the Maryland Department of Planning. Mr. Kimberly prefaced his presentation by noting that the comparison data contained in the presentations utilize different methodologies and source materials. He added that the sources are not directly comparable with one another or Round 8B, however the BMC supported the CFG's interest in considering the scale and growth of forecasts developed by expert consultants.

At the regional level, the Round 8B population forecasts were similar to the IHS Global forecasts throughout the forecast period (through 2040). The Woods and Poole Economics population forecasts were close to the others in the short-term, but the gap expanded over the forecast period. The chart of the employment data showed that the Round 8B forecasts fell between the IHS Global and the MDP forecasts, with the Woods and Poole Economics forecasts as the highest of those included in the exercise.

Some discussion of the implications of the results of the consultant analysis upon the CFG forecasting process followed the presentation. The CFG Chair, Margaret Kaii-Ziegler, tabled the discussion until the February 22, 2017 meeting. She suggested that the CFG members consider the analysis of the consultant data and the results of the forecasting survey, and come prepared to deliberate the future of the CFG's forecasting process at the February meeting.

In response to Mr. Kimberly's query about Round 8B updates, CFG members agreed to not submit updates, and continue to focus their efforts on the Round 9 forecasts.

[Presentation: Population and Employment Forecast Comparison, December 13, 2016]

5. YEAR IN REVIEW AND LOOK FORWARD – SHAWN KIMBERLY

In the few minutes remaining in the meeting Mr. Kimberly described the activities and accomplishments of the CFG over the course of Calendar year 2016. Highlights included the 2015

Master Establishment File update, a joint meeting with the Technical Committee including presentations on the Round 8B forecasts, changing demographics in Howard County, and the introduction of a scenario planning exercise, the endorsement of the Round 8B forecasts by the Baltimore Regional Transportation Board in August, the completion of the MPO forecasting survey, and a schedule for the Round 9 deliverables was finalized.

The primary activities planned for 2017 are the development and completion of the Round 9 forecasts and the review of the CFG's current forecasting process.

Two CFG members expressed interest in additional work items. Margaret Kaii-Ziegler suggested adding the local jurisdictions discussing their jurisdictional level population forecasting methods. Dan Rooney expressed interest in learning about MDP's Labor Force Participation Rate data, including historical trends by age group, as well as how it is projected over time.

NEXT MEETING – February 22, 2017

ATTENDANCE

Members
Elina Bravve - Baltimore City Department of Planning
Jeff Bronow – Howard County Department of Planning
Richard Campbell - Anne Arundel County Department of Planning
Chris Davis - Baltimore County Department of Planning
Scott Graf – Carroll County Department of Planning
Dan Rooney – Harford County Department of Planning
Alfred Sundara – Maryland Department of Planning
Margaret Kaii-Ziegler - Anne Arundel County Department of Planning
Kui Zhao - Baltimore County Department of Planning

Staff and Guests
Charles Baber - Baltimore Metropolitan Council
Shawn Kimberly - Baltimore Metropolitan Council
Blake Fisher - Baltimore Metropolitan Council