COOPERATIVE FORECASTING GROUP

December 20, 2023
10:02 A.M. to 11:23 A.M.

MINUTES

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

1. APPROVAL OF MINUTES

Mr. Cohoon asked for approval of the minutes from the October 25, 2023 meeting of the CFG. Ms. Kathleen Comber, Carroll County, moved to approve the minutes with Ms. Jamie Williams, Baltimore City, seconding the motion. The minutes were unanimously approved.

2. METHODS FOR CALCULATING HOLDING CAPACITY / LAND USE POTENTIAL: ANNE ARUNDEL 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. Rick Fisher, Anne Arundel County Office of Planning and Zoning, provided a presentation on the methods utilized in calculating holding capacity in Anne Arundel County.

Mr. Fisher said Anne Arundel County's holding capacity model considers zoning and current development regulations, as well as regulated natural features and land use values. It is primarily a GIS model and yields an estimate of the number of residential units that could be built under current conditions. While useful from a planning perspective, the analysis does not serve as a parcel-specific feasibility study or guarantee of development approvals.

A variety of additional factors contribute to property development including market changes, financing, public and private agreements and leases, and the personal preferences of property owners. The holding capacity analysis helps to identify properties that *can* be developed (such as vacant land, and land with redevelopment potential or subdivision potential), rather than to suggest viability.

In holding capacity analysis, vacant land is that which has assessed value of improvements of less than $10,000. Areas with redevelopment potential are those where the assessed value of the improvements is less than the assessed value of the land. Areas with subdivision potential

are parcels in residential zoning districts that have a lot size more than double the minimum lot size for that zone.

The process of the holding capacity analysis also accounts for properties that *cannot* be developed. Excluded from the analysis are properties owned by the government (federal, state, and / or local), recorded in subdivision plats as "open space" or floodplains, constrained by recorded conservation easements, and projects currently in the subdivision review process.

The spatial allocation of potential residential units is determined through model analyses of zoning classifications. The model considers residential zoning districts ranging in intensity from RA (Rural Residential, very low density, approximately 1 unit / 20 acres) to R22 (multi-family, higher density, approximately 22 units / acre). Also considered are other zoning districts where residential use is allowed by right or as a conditional use (including some commercial, industrial, mixed-use, and town center classifications). The model excludes protected natural features from the analysis (areas with steep slopes, wetlands, bogs, and stream buffers). Parcels with development capacity are then identified by the model, and potential new unit yields are calculated for each (parcel) – based upon zoning classification.

Mr. Fisher then summarized the key steps in the holding capacity model:

- Identify parcels with development potential (accomplished via a series of GIS processing steps utilizing ModelBuilder in ArcGIS Pro);
- Calculate actual yields for residential development in each zone (considering, for example, minimum lot sizes, critical areas, and water and sewer service infrastructure);
- Apply yield to developable parcels;
- Compare with growth forecasts and infrastructure capacity (results of the analysis are evaluated with growth forecasts and DPW water and sewer capacity models to determine consistency)

Mr. Fisher added that the county also monitors the demand side by considering permit activity and population growth over time. He said that in recent years, population growth has approximated 4,000 to 5,000 persons per year, and that growth is expected to continue through the foreseeable future.

[PowerPoint: Methodologies for Holding Capacity Analysis Model Development]

3. UPWP TASK UPDATE

Mr. 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." He said that the project kickoff meeting was held on November 14, and the group discussed the overall project task, schedule, and responsibilities. AECOM, the lead consultant, provided an updated project schedule, with phase one consisting of employee and employer surveys to be completed by May of 2024. Phase two of the project focuses on changing trends related to work from home, commercial real estate markets, and home location choice decisions, and is to be completed by October 2024, with a final report due in December. Mr. Kimberly requested

that the consultant share phase two preliminary findings with CFG as early as possible before the scheduled task completion dates. Meetings were held on December 7, and December 18 to discuss potential questions and strategies for the employee and employer survey sections of the report.

4. DISCUSSION: TIMING OF NEXT SET OF COOPERATIVE FORECASTS

Mr. Kimberly provided some context before opening the topic to group discussion. After a brief review on the process and timing of the Round 10 cooperative forecasts, Mr. Kimberly highlighted recent activity on local comprehensive plans, as new or updated plans may adjust the scale and spatial distribution of growth expectations. These changes should be reflected in the cooperative forecasts, where possible, to better reflect local growth policy. Multiple jurisdictions have adopted general plans since Round 10 was in development (or are expecting to adopt them soon), which could affect the scale, timing, and allocation of the datapoints in the forecast.

Mr. Kimberly then provided a review of the comparison between the vintage 2022 census population estimates and interpolated Round 10 2022 population figures (originally presented at the April 2023 CFG meeting). He also summarized the 2022 employment analysis presented at the June 2023 CFG meeting, which compared 2022 employment estimates (developed utilizing the CFG base-year employment methodology) to the CFG's interpolated Round 10, 2022 employment figures. The purpose of both analyses was to provide a marker for where federal estimates stand relative to projected Round 10 data, which may support discussion on forecast updates.

Additionally, Mr. Kimberly talked about the Master Establishment File (MEF) and a potential need for an update to that data set. At the October 2023 meeting, BMC staff provided a recap of the changes in QCEW employment at the onset of the pandemic, noting that the region lost 175,000 jobs, or 13.2% of total jobs between February and April 2020. Three years later, in June of 2023, the region is closing in upon pre-pandemic job totals, but was still about 9,000, or 0.7% below February 2020 employment. The question becomes about the scale, spatial location, and industry composition associated with these shifts in employment at the sub-county level. Mr. Kimberly thinks it makes sense to develop an updated MEF, which utilizes point-level QCEW data as a base, so that the employment changes across the region and within each jurisdiction are reflected in the next set of cooperative forecasts.

Finally, to help inform the CFG's discussion on the timing of the next set of cooperative forecasts, Mr. Kimberly explained to the group that the timing of the next long-range transportation plan (LRTP) might be accelerated by one year, and that shift could influence the timing of the next set of cooperative forecasts. Under the typical 4-year cycle, the next LRTP would be scheduled for approval in 2027. An accelerated cycle would place the next LRTP up for approval in 2026, with the supporting set of cooperative forecasts needing to be adopted in the summer of 2025, which translates to CFG membership submission of draft forecasts to BMC in November of 2024. The potential acceleration of the plan is a contributing factor in the proposed update to the MEF in calendar year 2024, to ensure that adjustments to employment levels, allocation, and industry mix can be reflected in the forecast supporting the next plan.

The CFG members then discussed the timing of the next set of cooperative forecasts, given the supporting information and LRTP scenarios provided by BMC staff, as well as consideration of local factors. The discussion revealed that the preference of the group is for the LRTP to adhere to the four-year cycle (and 2027 adoption), thus allowing for ample time to develop the supporting forecasts. The rationale for the preferred schedule included the following points:

- there would be an additional year of employment data available to support the MEF update (perhaps being more reflective of post-pandemic circumstances);
- the results of the Post-pandemic Trends consultant task could be properly considered and incorporated into the next set of forecasts (project work is scheduled to be complete by the end of 2024);
- Howard County is in the process of developing a Master Plan for Columbia Gateway (a major project that would capture a substantial portion of county population and employment growth through the forecast horizon), and more information will be available to support forecasting efforts in 2025;
- Baltimore County just completed work on *Master Plan 2030*, and has started work on their comprehensive rezoning process (both of which will help inform the forecasts);
- Baltimore City is currently working on a comprehensive plan update, *Our Plan*, (which will help inform the forecasts)

Ultimately, it was the consensus of the group to wait until the February CFG meeting to see if a decision is made regarding the timing of the next LRTP, before making a choice on the timing of the next set of cooperative forecasts. If the decision is to maintain the four-year cycle (adoption in 2027), then the CFG would prefer to push much of the forecast work to 2025 – in an effort to incorporate the most current employment statistics, locally developed planning factors, and the results of the Post-pandemic Trends consultant project. Should the decision be to accelerate the LRTP schedule, CFG membership agreed to expedite their own efforts to account for time lost (to work on MEF review) between the December 2023 and February 2024 meetings. Mr. Kimberly noted that even if the LRTP maintains a 2027 adoption schedule, jurisdictions will still have an opportunity to submit forecast adjustments in calendar year 2024, should there be an interest or need to do so.

[PowerPoint: Discussion – Timing of Next Set of Cooperative Forecasts]

5. NEW BUSINESS

Mr. Kimberly asked the CFG membership if they like the hybrid-meeting format, or if they would like to make an adjustment. He mentioned a few meeting options to consider including alternating between hybrid and in-person meetings, and/or getting together offsite - at a location outside BMC. The group will discuss the topic further at a forthcoming meeting.

The next CFG meeting will be held on February 28, 2024. The meeting adjourned at 11:23 A.M.

ATTENDANCE

Members

Austin Broderick, Baltimore County Department of Planning
Steve Cohoon, Queen Anne's County Department of Public Works
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