COOPERATIVE FORECASTING GROUP
February 28, 2024
10:00 A.M. to 12:00 P.M.

MINUTES

Mr. Steve Cohoon, Queen Anne's County, called the meeting to order at 10:03 A.M.

1. APPROVAL OF MINUTES

Mr. Cohoon asked for approval of the minutes from the December 20, 2023 meeting of the CFG. Mr. Jeff Bronow, Howard County, moved to approve the minutes with Mr. Rick Fisher, Anne Arundel County, seconding the motion. The minutes were unanimously approved.

2. METHODS FOR CALCULATING HOLDING CAPACITY / LAND USE POTENTIAL: QUEEN ANNE'S 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. Steve Cohoon, Queen Anne's County Department of Public Works, provided a presentation on the methods utilized in calculating development capacity in Queen Anne's County.

Mr. Cohoon provided an overview of the county's general approach to growth projections in previous rounds, noting their consideration of existing zoning regulations, a review of development potential of vacant land, an accounting of housing type, lot size, and permitted densities, the capacity for infill development, the review of comprehensive plans for towns, and projecting buildout over time.

Mr. Cohoon then explained that Queen Anne's County has incorporated changes in land use and growth management policy into their population and household projections. The state's Septic Law (2012) changed growth strategy in rural areas, effectively capping growth, as development in those areas became more limited based upon the law. The county also drafted a new comprehensive plan, PlanQAC adopted in 2022, that acknowledges the jurisdiction's commitment to land preservation (including a significant amount of protected farmland). Mr. Cohoon also discussed the limitations of the county's sewer capacity in supporting further residential development. The county has one sewer treatment plant with a capacity of 3 million

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Voting: City of Annapolis, Anne Arundel County, Baltimore City, Baltimore County, Carroll County, Harford County, Howard County, Queen Anne's County, MD Department of Transportation and RTA of Central Maryland. Non-Voting: MD Department of the Environment, MD Department of Planning, and MD Transit Administration.

gallons per day. The plant is nearly fully obligated, and the county has limited ability to increase sewer treatment capacity and no known path to expand the sewer treatment plant.

Mr. Cohoon highlighted the incorporated towns in Queen Anne's County such as Centreville and Church Hill, where there is potential for modest growth, but the growth outlook is curtailed by the sewer capacity issues. He described each of the eight incorporated towns in the county as having a small population with limited or no sewer capacity. These observations influenced how Queen Anne's County approached their Round 10 household and population projections, which saw substantial reductions in growth expectations compared with Round 9A.

Mr. Cohoon described the collaboration between the county's Department of Planning and Zoning and Department of Public Works in mapping out projects and plans to inform calculations and estimates of development potential. Data from the 2020 Census were used to form recalibrated baselines for household and population estimates by census tract and transportation analysis zone (TAZ). Approved projects under construction, approved and unbuilt projects, and pending projects in the approval process (with sewer allocation) were mapped and evaluated to determine estimates for future housing unit growth and phasing based upon proposed development.

The county's estimated remaining sewer capacity is 300,000 gallons per day (GPD). However, 125,000 GPD is allocated for areas with failing septic systems and 75,000 GPD is reserved for commercial and institutional uses, leaving 100,000 GPD for residential infill development.

Upon the calculation of the county's housing unit development capacity, phasing of buildout of households by year and TAZ was determined. Then, estimates for future population growth were created by applying the average household size to the number of projected units – resulting in population increase by TAZ in five-year increments. While there is a limited number of group quarters facilities in Queen Anne's County, their populations are considered in the forecasting process through local knowledge of facilities, zoning regulations, and sewer capacity. The county's approach to determining development potential is reviewed every few years and is adjusted as needed.

Mr. Shawn Kimberly, BMC, asked how a new bay bridge might affect future growth in Queen Anne's County.

Mr. Cohoon said that under the current septic and sewer regulations, the County would not be able to meet demand for more growth than is projected in their comprehensive plan. Mr. Cohoon and Mr. Kimberly agreed that a limit on housing supply could have the potential to increase prices. Mr. Cohoon said that as more and more jurisdictions approach their sewer capacity limitations, there will be more discussion on mitigation strategies.

Mr. Rick Fisher, Anne Arundel County, asked if Queen Anne's County considered any other options for discharging waste, for example injecting it into the ground.

Mr. Cohoon said the soils are poor where the treatment plant is located on Kent Island, and they do not have large swaths of farmland in the area for discharge. While Centreville has some farmland available for a treated wastewater spray irrigation field, effluent would have to be delivered to the area, which is expensive.

Mr. Jeff Bronow, Howard County, asked if Queen Anne's County's treatment plant was upgraded to mitigate nitrogen discharge and therefore increasing capacity.

Mr. Cohoon said yes, and that the plant meets the newest specifications and discharges the cleanest effluent.

[PowerPoint: Queen Anne's County Land Use & Development Capacity]

3. 2023 NATIONAL POPULATION PROJECTIONS: U.S. CENSUS BUREAU

In November 2023, the Census Bureau released their first set of National Population Projections utilizing the 2020 Decennial Census as a base. The data series provides projections of the national population by age, sex, race, Hispanic origin and nativity through 2060, and by age, sex, and nativity through 2100. Dr. Sandra Johnson, Chief, Population Evaluation, Analysis and Projections Branch of the U.S. Census Bureau, provided a presentation on the projection scenarios and components of change.

The projections encompass four immigration scenarios and cover the period from 2023 to 2100. The approach for the projections utilizes the same cohort-component methodology used in the Census Bureau's 2017 projections release - with minor alterations. Projections start with a base population, add births, subtract deaths, and consider net migrants. The projections use the Census Bureau's vintage 2022 national population estimates, supplemented with data from the American Community Survey to arrive at a base population. The projections use mortality and fertility data from the National Center for Health Statistics. In the case of fertility rates, a convergence approach is used, and assumes all groups will converge on the average of the native white population in 2123. The age-specific fertility rates are applied to the female population by single year of age and by six nativity, race, and ethnicity groups to produce the projected number of births in each year.

Dr. Johnson also discussed the projections of international migration, which are made of four separate components (native emigration, Puerto Rico migration, foreign-born immigration, and foreign-born emigration) and take into account data from sending regions. She discussed various immigration scenarios for population growth modeling. She explained the methodology for calculating foreign born emigration using a residual approach and noted higher than expected rates.

Dr. Johnson then presented results from four projection scenarios for the U.S. population through 2100. The main scenario projected population growth to 366 million in 2100, with a significant slowing of future growth. The high and low immigration scenarios projected populations of 435 million and 319 million, respectively, for year 2100, while the zero immigration scenario projected a population decline to 226 million.

Dr. Johnson also compared growth projections from 2023 with those from 2017, highlighting the impact of changes in fertility, mortality, and immigration assumptions on population growth projections. She noted slower projected growth compared to the 2017 projections. She added that immigration is expected to be the largest contributor to population growth (in all scenarios except the zero immigration scenario), while natural change is expected to become

negative across all scenarios (sooner for the low and zero immigration scenarios). The non-Hispanic white alone group was projected to remain the most prevalent in the U.S. through 2060 under all scenarios (although it is projected to fall below 50 percent in all except the Zero Immigration scenario). The population is projected to become older and more racially and ethnically diverse over time.

Mr. Bronow asked if Dr. Johnson was surprised by the drop in birth rates, and if she expects the trend to continue.

Dr. Johnson said that she was not alarmed by the presence of the drop, but was a bit surprised by its scale. She is not sure if the trend will continue.

[PowerPoint: 2023 National Population Projections]

4. CFG FOLLOW-UP DISCUSSION: TIMING OF NEXT COOPERATIVE FORECASTS

Mr. Kimberly provided an update on the timing of the next Long-Range Transportation Plan (LRTP) and led a discussion on plans for the next set of cooperative forecasts. To start the conversation, Mr. Kimberly provided a recap of the discussion about the need for and timing of the next set of forecasts from the December CFG meeting. He reminded the group that there had been consideration given to changing the timing of the next LRTP, and that the preference of the CFG was for the next plan to adhere to the four-year cycle (and 2027 adoption). This schedule would allow for ample time to develop the supporting forecasts – utilizing the most up-to-date datasets and to incorporate the results of the Post-pandemic Trends consultant task. Mr. Kimberly informed the group that the decision had been made to maintain the standard four-year cycle, with a plan approval target set for 2027. Jurisdictions will still have an opportunity to submit forecast adjustments in calendar year 2024, but participation is optional.

Mr. Kimberly emphasized that all members will need to participate in the forecast update process in calendar year 2025 (with expected BRTB adoption in the summer of 2026). Participation in 2025 will be mandatory for two principal reasons:

- First, the CFG will be updating the Master Establishment File in order to capture changes to employment (scale, industry mix, and spatial distribution), and it is critical that the employment by industry information across all jurisdictions come from a common file, edited and endorsed by all participants;
- Second, the forecast horizon year needs to be extended to 2055 to support the next LRTP (5-years beyond the Round 10 forecast).

Mr. Kimberly said that he will continue to monitor federal population and employment estimates and to make presentations to the group comparing the estimates to projected Round 10 data - as this may help inform the group's thinking about the type and scale of adjustments they want to make in the next set of cooperative forecasts. Mr. Kimberly said that if the group is interested, we can hold open discussions at future meetings where membership can talk about the types of changes they are planning to make and how they plan to implement them.

A presentation from the consultant on the post-pandemic trends project is planned for late fall or early winter. Mr. Kimberly gave a brief update on the project status. He mentioned that the employer and employee surveys are complete and have been distributed. The employee survey was sent to 75,000 households in the region, is to be completed online (with a call-in option), and closes March 18. The employer survey, distributed by local partners, closes March 20. A draft report on this portion of the project (Phase 1) is expected in mid-May 2024.

Mr. Bronow asked about the expected geographic detail of the employer survey. Mr. Kimberly responded that while it is a regional effort, he was hopeful there would be enough response to support some county level analysis. Mr. Kimberly also addressed a question about employer cooperation with the survey, noting that while responding employers have been willing to share detailed information, response rates have varied across jurisdictions.

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

5. NEW BUSINESS

Mr. Kimberly asked if the CFG would be interested in holding in-person meetings in 2024, suggesting that the June and December meetings might be a good way to test the format this year. He added that one of the meetings could be held at an off-site location of interest, and that the group could discuss the topic in more detail at the April meeting. Finally, Mr. Kimberly shared that staff from the Maryland Office of the Comptroller had presented to the BRTB on the Maryland 2023 – State of the Economy Report, and added that CFG membership might find it informative.

Mr. Todd Lang, BMC, shared the presentation slides from the BRTB meeting on the State of the Economy report.

The meeting adjourned at 11:38 A.M.

ATTENDANCE

Members
Krishna Akundi, Maryland Department of Planning
Austin Broderick, Baltimore County Department of Planning
Jeff Bronow, Howard County Department of Planning and Zoning
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
Alfred Sundara, Maryland Department of Planning
Jamie Williams, Baltimore City Department of Planning

Staff and Guests
Greg Goodwin, Metropolitan Washington Council of Governments
Sandra Johnson, U.S. Census Bureau

Shawn Kimberly, BMC
Todd Lang, BMC
Gabriele Linder, Baltimore Development Corporation
Crystal McDermott, BMC
Md. Mohklesur Rahman, BMC
Brian Ryder, BMC
Larysa Salamacha, Baltimore Development Corporation
Matt, Insight Transportation Consulting
Sandra Johnson, US Census Bureau - Chief, Population Evaluation, Analysis, and Projections Branch