



Baltimore Metropolitan Council



Metropolitan Report 2008

Our Mission

The Baltimore Metropolitan Council is committed to identifying regional interests and developing collaborative strategies, plans and programs which will improve the quality of life and economic vitality throughout the region.

Who We Are

BMC is the organization of the region's elected executives. The BMC Board is composed of the Mayor of Baltimore, the executives of Anne Arundel, Baltimore, Harford and Howard counties, and a member of the Carroll County Board of Commissioners. BMC's staff works closely with the staffs of member jurisdictions.

History

BMC carries on a tradition of formal regional planning that began half-a-century ago in 1956, when the Baltimore Regional Planning Council was created within the Maryland Department of Planning. In 1963, the Regional Planning Council (RPC) emerged as a separate state agency. In 1989 the name of the organization was changed to Baltimore Regional Council of Governments (BRCOG) to reflect the RPC's resolve to serve as the regional voice of local government. In 1992, recognizing the need for a smaller, more efficient organization, the Maryland General Assembly dissolved BRCOG and created BMC as a private nonprofit organization of the region's elected executives.



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A Letter from the 2007 BMC Chair

Looking back on my time as Chair of the Baltimore Metropolitan Council, I'm impressed by the sincere efforts of my colleagues to collaborate and address shared challenges facing the region.

As the region begins receiving its first wave of jobs related to Base Realignment and Closure (BRAC), regional cooperation throughout the greater Baltimore area has blossomed. Harford County launched a multi-jurisdictional BRAC coalition, the Chesapeake Science and Security Corridor (CSSC) consortium. The CSSC represents a broad group of members from neighboring jurisdictions impacted by BRAC-related growth at Aberdeen Proving Ground as well as other strategic partners, including the Baltimore Metropolitan Council.

In January, the CSSC was recognized by the National Association of Counties as a national model for “unprecedented” regional cooperation among neighboring jurisdictions, and has been invaluable in evaluating opportunities and challenges presented by BRAC.

Another milestone of 2007 was the Baltimore Regional Transportation Board's (BRTB) update to the region's fiscally-constrained Long-Range Transportation Plan—a two year planning process with spirited public involvement. The federally-mandated draft plan was released in July. After dozens of public meetings and other opportunities for public comment and dialogue, it was amended to include increased funding for transit projects. The final plan was adopted in November.

I would like to personally thank Howard County Executive Ken Ulman for his leadership as chair of the BRTB during this time, as his efforts to find greater consensus among the state and local jurisdictions resulted in a better multi-modal plan with more emphasis on mass transit improvements. I wish Ken well as he takes the helm as the new BMC chair for 2008.

A handwritten signature in black ink that reads "David R. Craig". The signature is written in a cursive, flowing style.

David R. Craig

Harford County Executive

Introducing the 2008 BMC Chair

Ken Ulman was sworn in as Howard County Executive in December 2006. At the age of 32, he became the youngest County Executive ever elected in the state of Maryland. Prior to that, Ken ran his own law firm in Columbia and represented Howard County's District 4 as a County Council member.

As County Executive, Ken has focused on key areas such as public safety and health, education and the environment. He established a Commission on the Environment and Sustainability which spent six months working to identify sound environmental practices. As a result of that process, Howard County now provides significant tax credits to businesses that build "green" buildings. Ken also made Howard County among the first counties in the country to be an active participant in the U.S. Mayors Climate Protection Agreement, an effort to reduce global warming.

Ken was elected Chair of the Baltimore Metropolitan Council in January of 2008. He is also Chair of the Baltimore Regional Transportation Board. In addition, he serves on the Maryland Association of Counties' Board of Directors and is a member of the Board of Directors of the County Executives of America.

Ken was named one of *Baltimore Magazine's* "15 Most Intriguing People of 2007" as well as one of the *Baltimore Business Journal's* "40 under 40", which honors 40 of the region's outstanding young professionals. He has also served on the board of the Ulman Cancer Fund for Young Adults.

With lifelong roots in the community, Ken is a product of the local public school system. He graduated from Centennial High School and received his bachelor's degree in government and politics from the University of Maryland, College Park. He completed his law degree from Georgetown University Law Center.



A blurred high-speed train with a white body and blue accents is crossing a concrete bridge over a river. The bridge has a metal railing on top. The background shows a clear blue sky and some bare trees. The text is overlaid on an orange rectangular box in the upper right corner.

Long-Range Transportation

Making the Most of Limited Resources

Planning

BMC's Transportation Planning Division provides technical support to the Baltimore Regional Transportation Board (BRTB), the federally-recognized Metropolitan Planning Organization (MPO) for the Baltimore region. The BRTB is comprised of the BMC Board and representatives of the City of Annapolis and the Maryland Departments of Transportation, Planning and the Environment. The BRTB is charged with updating the long-range transportation plan every four years.

Transportation Outlook 2035 is the most current update to the Baltimore region's long-range transportation plan. The federally-mandated plan outlines capital investments that seek to address the region's transportation needs for the next 25 years. The plan is fiscally-constrained and tested to ensure compliance with federal air quality standards. All future capital transportation investments must be included in the plan in order to receive federal aid.

The BRTB initiated the two-year planning process to create Transportation Outlook 2035 by first developing the goals of the plan. The goals were compared with best practices of other MPO plans, and evaluated to ensure congruence with new federal standards.

Fiscal Reality

After the goals were developed and endorsed by the BRTB in January 2007, the BRTB, with technical support from Maryland Department of Transportation, identified the fiscal constraints of Outlook 2035. Federal law requires that future revenue must be sufficient to fund the estimated cost of transportation investments outlined in the plan. Revenue projections were based on historic patterns of federal, state and local transportation funding for the Baltimore region. The BRTB concluded that projected revenues will not adequately meet the region's transportation needs over the next 25 years.

The BRTB fiscal analysis estimated that a total of \$33.4 billion would be available to operate, maintain and expand the region's transportation system through the year 2035. This included the estimated \$17.9 billion needed for operations and \$6.8 billion needed for system preservation, leaving only \$8.7 billion for new capital expansion investments that were outlined in Transportation Outlook 2035.

"A common misconception about the constrained long-range plan is that it is a detailed picture of all future transportation needs and priorities. Not so. The focus of the plan, as required by federal law, is to detail future expansion projects, which account for only one quarter of estimated future transportation spending, or about \$8.7 billion," said Harvey S. Bloom, BMC's Director of Transportation Planning.

Goals for Outlook 2035:

- Improve Safety
- Maximize Transportation System Management and Operations
- Increase Accessibility and Mobility
- Preserve the Environment
- Improve Transportation System Security
- Link Transportation Investments with Land Use and Economic Development
- Foster Inter-Jurisdictional Participation and Cooperation

Operations \$17.9 Billion

Funding covers the day-to-day operations of the transportation system. For transit, this includes the cost of running buses and trains, and for highway, it may include maintenance projects that are of a smaller scale than preservation projects (i.e., filling potholes, clearing debris, etc.).

Preservation \$6.8 Billion

System preservation is essential to keeping a safe and well-run transportation system. This includes activities such as resurfacing roads, repairing bridges, maintaining buses and transit tracks, etc.

Expansion \$8.7 Billion

This is funding for all capacity improvements. These include projects such as building a new transit line, increasing lanes on a highway, or adding a new bicycle and pedestrian trail.

Highway & Interchange \$6 Billion

Projects funded include federal aid eligible highways and roadways maintained by the State Highway Administration, as well as each local jurisdiction.

Transit \$2.2 Billion

Transit projects in this category include a new rail service and MARC improvements operated by the Maryland Transit Administration.

Other Strategies \$0.5 Billion

This category includes: capital improvements, technical enhancements, and commuter assistance. Capital improvements include the purchase of alternative fuel buses, bicycle and pedestrian enhancements, and strategies to optimize system performance.

“Most future transportation dollars will be spent on operations—most significantly, transit operations—and system preservation, totaling about \$25 billion.”

—Harvey S. Bloom

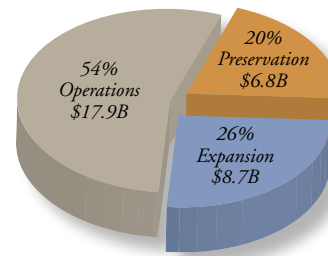
The Challenges:

- Viable Transportation Options
- Aging Infrastructure
- Socio-Economic Growth
- New Military Employment
- Increase Demand for Capacity
- Freight Movement Growth
- Environmental Challenges
- Sustainability Issues

“The truth is, most future transportation dollars will be spent on operations—most significantly, transit operations—and system preservation, totaling about \$25 billion.” Bloom concluded.

In addition, funding to support system preservation, operations and new capital expansion projects has not kept pace with increasing costs for materials and labor. Overall costs of transportation improvements have gone up 42 percent since 2004 and are projected to increase due to the worldwide demand for materials such as concrete and steel.

“Inflation, the rising cost of materials and the need to maintain and replace the



region’s aging infrastructure all limit our ability to build new transportation facilities,” Howard County Executive Ken Ulman wrote in a letter during the Transportation Outlook 2035 public comment period.

Challenges

Combined with funding shortfalls, the region faces a number of other challenges that the BRTB sought to address in Transportation Outlook 2035. Anticipated changes in the age of the region’s population and the numbers and locations of households and jobs will create mobility challenges.

Prioritization

After developing the fiscal constraints of the plan, the BRTB used a process called “prioritization” to select the capital investments outlined in the plan that collectively respond to current and future transportation challenges.

The BRTB developed criteria and a subsequent list of six “Regionally Significant” projects that are of critical importance to all users of our transportation system. BRTB members worked to identify future transportation projects that were consistent with local priorities. Over 130 highway, transit, bicycle, pedestrian and management and operations projects were submitted for consideration. The

prioritization process allowed for a collaborative review of both the policy and technical merits of each project.

Throughout this process the BRTB relied, in part, on technical expertise and tools developed by BMC staff. These tools included:

Travel Demand Model: BMC staff maintains a complex multimodal travel demand forecasting model of the region's transportation network. The model is used to estimate travel demand and behavior in future years. This allows planners to test various "what if" scenarios.

Socio-Economic Projections: BMC staff works with local planning agencies to collaboratively develop socio-economic projections, including population, households, and employment for the Baltimore region.

These tools, among others, were invaluable to the prioritization process and helped ensure that selected projects will address regional goals and promote viable transportation choices.

Public Involvement

During the course of developing Transportation Outlook 2035, the BRTB, with staff support from the BMC, proactively engaged various stakeholders, which brought many points of view to the planning process.

A Citizens Advisory Committee meets regularly and provides feedback to the BRTB. A draft of Transportation Outlook 2035 was released for public review using the best practices for public outreach and participa-

tion. Public outreach events were held throughout the region. Technologies such as electronic newsletters, frequent updates on the Baltimore Metropolitan Council's web site and digital imagery were also used to better engage the public.

The Final Plan

Ultimately, the expansion projects that were outlined in the plan do not reflect all the investments the BRTB believes are necessary to meet the future mobility needs of the region. Rather, the plan was an effort to balance the region's needs with fiscal reality and prioritize the capital investments, in accordance with federal requirements.

"This plan is not a wish list, but a carefully selected set of projects for which funding is expected to be available," Ulman wrote.

The BRTB was forced to exclude needed highway capacity investments and significant capital expansion of the region's transit network from Transportation Outlook 2035 due to lack of funding.

However, based on significant public input on the need for additional capital transit expansion projects, the BRTB, led by County Executive Ulman, worked to reduce the number of highway projects outlined in the draft plan and shift those funds into transit expansion as outlined in the final plan.

The BRTB voted to adopt the final plan in November 2007.

"Public involvement is a key part of the transportation planning process."

-Ken Ulman



A photograph of a construction site under a clear blue sky with scattered white clouds. In the foreground, a large, vertical blue metal pipe is visible on the right side. The background shows a multi-story building under construction, with several tall, lattice-structured cranes extending upwards. The building's structure is made of concrete and steel, with some windows visible. The overall scene is bright and clear, suggesting a sunny day.

BMC's Building Permit Data

A One-Stop Shop for the Baltimore Region

System:

What do BMC staff, a carpeting installer, cabinet maker and lumber company have in common? They all use BMC's online Building Permit Data System in the course of their work. BMC staff uses this information as a leading indicator of new regional development patterns. Specialty contractors, retailers and providers of services use the data to locate potential customers and grow their businesses.

Every new construction project and any significant improvement to an existing structure is required to have a building permit issued by the county or incorporated municipality where the work is being done. Anne Arundel, Baltimore, Carroll, Harford and Howard counties issue permits in the Baltimore region, as well as Baltimore City, the City of Annapolis and the towns of Aberdeen, Bel Air and Havre de Grace.

The Baltimore Metropolitan Council's predecessor organizations began compiling the region's building permit data and organizing it into a standardized database in the 1970s. The resulting information, collected from all permits with a value of \$10,000 or more, provides a continual record of plans for new and renovated residential, commercial/industrial and institutional building projects.

Building permit data has been offered online since 2002. "At that time each jurisdiction submitted paper copies of all their permits," explained Mary Logan, Manager of the Regional Information Center. "BMC staff entered information from each permit into a computerized database by hand."

All the major jurisdictions now submit their permit data electronically. This provides more complete information in a more timely manner, and reduces the likelihood of error in adding a permit to the database.

"Converting to electronic transmission was a complicated process," Logan added. "As each jurisdiction's data comes in, it goes through a translation process before it can be uploaded into the BMC database."

Quality control is done on a continuing basis as data is received. A BMC staff member makes a phone call to the originating jurisdiction if information on a permit needs to be clarified. Additional quality controls are performed before the online database is updated on Friday afternoons.

Summaries of residential and non-residential data for each year back to 1998 are available at www.baltometro.org. Older data are archived on paper in the Regional Information Center and can be viewed by appointment. Monthly and quarterly reports are available by subscription. Subscribers may also access the entire online database.

New construction is classified as residential, non-residential or mixed use. Non-residential construction includes institutional, industrial, educational, and religious facilities as well as warehouses, offices, utilities, and retail establishments. Mixed use construction combines residential and non-residential units.

“BMC’s Building Permit Data System is a one-stop shop for the entire region.”

—Mary Logan

The additions, alterations and renovations category includes both residential and non-residential construction. Demolition is included in this category as well.

“The online system provides quick and easy access to recently issued construction permits and allows the user to look at specific residential or non-residential projects,” explained Dunbar Brooks, BMC’s Manager of Data Development. “A subscriber can review construction authorization in a number of different ways: by location, value, builder, date of permit or type of structure.”

“The quarterly reports provide a summary of construction activity throughout the Baltimore region,” Brooks continued. “The narrative portion of the report describes what is going on, and maps highlight the greatest concentrations of different kinds of construction activity.”

Customized reports are also available by special one-time request, and are priced on a custom basis. The price of a subscription, \$495 annually, has not changed since the service was first offered in 2002. Annual summary reports are available for free online.

Several local jurisdictions post building permit data online for free. However, BMC’s information is more comprehensive. “BMC’s Building Permit Data System is a one-stop shop for the entire region,” Logan added.

Looking at the Data: What Building Permits Can Tell Us

It should come as no surprise to anyone that new housing construction was affected by the economic downturn in 2007 along with the sales of new and existing homes. Just what were the effects?



Residential Construction

The Baltimore region permitted 5,920 new residential units in 2007, 25.3 percent fewer than in 2006.

Anne Arundel and Howard counties led the region in the numbers of new residential permits issued, with 1,851 and 1,390 respectively.

The number of single family homes permitted decreased by 18.3 percent, to 4,586.

The largest numbers of single family homes were in Howard (1,115) and Anne Arundel (1,055) counties.

At the RPD (Regional Planning District) level, the largest numbers of permits issued were in Edgewood-Joppa (360 homes), Jessup-Severn (333 homes) and Elkridge (317 homes). These RPDs are near Aberdeen Proving Ground and Fort George G. Meade, which will both experience growth related to Base Realignment and Closure (BRAC).

The number of new multi-family units permitted in the region declined by 42.3 percent to 1,334.

Anne Arundel County led the region by permitting 796 units and Howard County followed with 275 units.

At the RPD level, the most new multi-family units were permitted in Crownsville (389 units), Jessup-Severn (280 units) and Govans-Northwood (85 units).

The value of residential remodeling declined by 12.7 percent throughout the region, to \$538.9 million.

The greatest investments in existing residential units occurred in Baltimore City (\$145.9 million) and Baltimore County (\$135.5 million).

Non-Residential Construction

The value of new non-residential projects rose to \$1.58 billion, a 23.1 percent increase from 2006.

Baltimore City was the regional leader in this category with estimates valued at \$708.5 million. Much of this work was associated with new construction at Johns Hopkins Hospital, Kennedy Krieger Institute and Mercy Health Services, Inc.

Anne Arundel County was second with \$341.3 million, much of it associated with the Annapolis Town Center.

Howard County was third with an estimated \$241.4 million in new construction.

The estimated value of new hospitals, group homes and senior centers was \$563.7 million, exceeding the value of retail/commercial and office buildings. Cost estimates in health care facilities increased 302.6 percent from 2006. One project, a new clinical building at Johns Hopkins Hospital, with estimated costs of \$460 million, accounted for most of the permit value in this category.

Retail/commercial estimated were the second highest category, with a total of \$303.7 invested, a 17.7 percent increase from 2006. This category was followed by office and bank buildings (\$245.7 million), industrial structures (\$151.8 million), and school construction (\$151.7 million). Permits for hotels and motels decreased the most from 2006, to \$35.4 million, an 84.3 percent decline.

Non-residential remodeling increased in value by 15.9 percent to \$1.33 billion.

Baltimore City led the region with values totaling \$432.5 million, a 21.8 percent gain. Baltimore County followed with \$382.2 million (an 11.5 percent decrease). Anne Arundel County had the third highest value in this category with \$223.5 million, a 51.4 percent increase.

A Ten-Year Partnership: State of the Region 1997–2007



In December 2007, the Greater Baltimore Committee (GBC) released its fifth State of the Region Report. The report ranks the Baltimore area with 19 other benchmark U.S. metropolitan areas by examining relative economic health and performance. The 2007 edition, like previous editions starting in 1998, is a joint initiative between the GBC and the BMC.

“We were pleased to have the opportunity to work with GBC again on this important regional initiative,” said Larry Klimovitz, Executive Director of the BMC. “We look forward to continuing this effort in future years.”

The purpose of the report is to provide a comprehensive and objective analysis of the Baltimore region’s competitive advantages and disadvantages as compared to a diverse set of other metropolitan areas throughout the United States.

The report contains rankings of 105 economic indicators using the most up-to-date information available from a variety of sources.

“It’s absolutely critical that we, as a region, take a comprehensive and honest look at our strengths and weaknesses as compared to other peer regions across the nation,” said Donald C. Fry, President & CEO of the Greater Baltimore Committee. “The State of the Region report is a tool that guides us on how to build on our success and tackle tough challenges—together.”

BMC staff compiled and ranked the data in the report while the GBC, along with the Jacob France Institute-University of Baltimore, conducted the data analysis, composed the report’s findings and managed its publication.

Mr. Fry and Richard Clinch, Director of Economic Research at the Jacob France Institute presented the report and a summary of its findings at a meeting of the BMC Board of Directors in January 2008.



“We were pleased to have the opportunity to work with GBC again on this important regional initiative.”

—Larry Klimovitz

“The State of the Region report is a tool that guides us on how to build on our success and tackle tough challenges.”

—Don Fry



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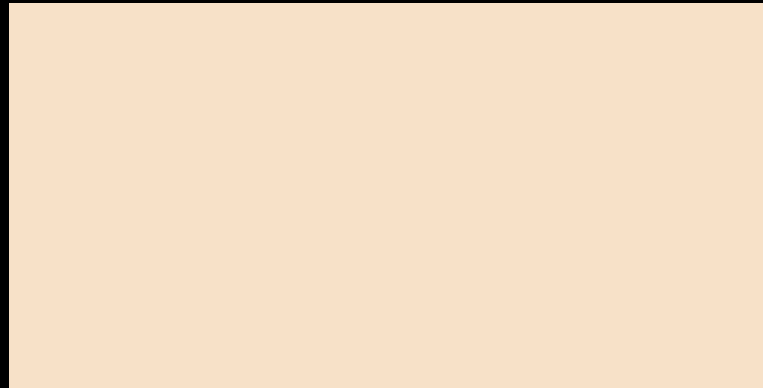
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How can BMC help you?

- ⌘ Support for Strategic Planning
- ⌘ Custom Mapping
- ⌘ Geographical Coding
- ⌘ Statistical Analysis
- ⌘ Demographic/Economic Forecasting