

COOPERATIVE FORECASTING GROUP

June 24, 2020

Virtual Meeting

10:05 A.M. to 12:04 P.M.

MINUTES

Ms. Kui Zhao, Chair of the Cooperative Forecasting Group (CFG), called the meeting to order at 10:05 a.m.

1. APPROVAL OF MINUTES

After a brief discussion and a few modifications, Ms. Zhao moved to approve the minutes from the April meeting of the CFG with Ms. Deborah Grant seconding the motion. The minutes were unanimously approved.

2. ANNE ARUNDEL COUNTY POPULATION, HOUSEHOLD, AND EMPLOYMENT FORECASTING METHODS

Mr. Rick Fisher, Anne Arundel County Office of Planning and Zoning, began the presentation on his agency's forecast model development by listing the data points covered: households, population, and economic indicators (including employment). Mr. Fisher said that their base level data is aggregated to the Transportation Analysis Zone (TAZ) level and that a linear regression approach is utilized to project growth.

The household forecast begins with the development of a base year figure using an address point inventory. With the base year established, projected household growth takes into account the following factors: new residential construction permitting activity; demolition permits; residential pipeline development; residential holding capacity (via a GIS based holding capacity analysis); and water billing and redevelopment/revitalization data (to assist in the development of vacancy rates).

Population forecasts begin with base year data developed with the address point inventory. The base year estimates and forecasts of population are based upon: household size assumptions applied to the various household types; group quarters populations (which include estimates created with the help of contacts at the Naval Academy and Fort Meade); and vital statistics (births and deaths) from the Maryland Department of Health.

Mr. Fisher said that the employment estimates and forecasts are based upon Bureau of Economic Analysis wage and salary employment data, commercial and industrial development pipeline data, information from the county's economic development group, and news articles about job growth in the county. All of the above information is factored into estimates and forecasts that are developed in five-year increments through 2045 with the use of a linear regression model. Once complete, the forecasts go through an informal qualitative review with the assistance of staff from planning and transportation to ensure that the data properly reflect anticipated growth patterns.

Ms. Zhao pointed out that there are several similarities between the Anne Arundel County methods and those of the other jurisdictions that have presented on the topic (Baltimore County and Carroll County). She asked about the methods used to convert the tract level vital statistics data from the Department of Health to TAZ level geography. Mr. Fisher said that they use GIS to overlay the TAZ layer onto the tract level vital statistics data and attempt to allocate it based upon the location of population concentrations within the TAZs (as the Department of Health would not provide the data with any greater resolution). When asked how the vital statistics are incorporated into the forecasting process, Mr. Fisher said that that dataset is used as a check upon their regression model, and does not serve as a direct input.

Mr. Greg Goodwin, Metropolitan Washington Council of Governments (MWCog), asked about data sources used to determine employment levels at the TAZ level. Mr. Fisher said that he has been building off the employment distribution in the existing employment datasets. Mr. Kimberly added that several jurisdictions utilize the Master Establishment File (MEF) for the purpose of allocating jurisdictional level employment totals to the TAZ. He explained that the MEF is a point level data file developed with the Quarterly Census of Employment and Wages (QCEW) data serving as the base. The BMC has secured a data sharing agreement with the Maryland Department of Labor that allows specified BMC and local government staff to utilize the QCEW file for regional planning purposes, including the development of employment estimates and modeling data. BMC geocodes the raw QCEW file and provides it to local jurisdiction staff (that have signed confidentiality agreements) for their review and input. The local knowledge and expertise of jurisdictional staff is key to enhancing the utility of the file, particularly as it pertains to the point-level location of government employment, public school employment, and other major employers. This MEF file is then used not only for employment allocation purposes, but also in the development of model inputs that require industry specific employment data at the TAZ level.

Mr. Charles Baber, BMC staff, asked if Anne Arundel County households and population data are developed independently of employment, or if they were somehow reconciled. Mr. Fisher said that the forecasts are done independently of one another, as large government employment (particularly in the Fort Meade area), draws workers from other jurisdictions.

[PowerPoint: ForecastMethods_AnneArundelCounty]

3. FORECAST UPDATE SCHEDULE AND COVID-19 IMPACTS: DISCUSSION

Mr. Shawn Kimberly, BMC, reminded the group that under the plans described at the April CFG meeting, the Round 9B jurisdictional level forecasts were to be due by June 30, with TAZ level forecasts due by November 30, 2020. Round 9B was intended to support an accelerated schedule for the next Long Range Transportation Plan. Approval of the LRTP in 2022 (rather than 2023) would remove its' approval from an election year cycle for several jurisdictions. He explained that participation in the Round 9B update was to have been mandatory, as the horizon year needed to be extended to year 2050. However, it has become clear that the development of the next LRTP – and our transportation planning processes generally - must incorporate the rapid, dramatic, and ongoing economic impacts of the COVID-19 pandemic. It would not be possible to maintain the accelerated LRTP update schedule while also including COVID-19 impacts (socioeconomic and others) in the analyses. As a result, the LRTP will follow the typical four-year schedule (with planned approval in 2023), as opposed to the accelerated three year schedule.

Mr. Kimberly then shared a draft version of the 2023 LRTP update schedule, highlighting the plan elements that are most relevant to the CFG: the development of the demographic forecasts and the creation of model inputs, with BRTB adoption expected in July 2022. He then displayed the timing of the release schedules of the data points that would be required to complete the update in time to meet the LRTP schedule.

Mr. Kimberly showed a comparison of the release schedules of the datasets utilized in the development of the CFG's current base-year employment estimate methodology with the timing of the demographic forecasting task of the LRTP, demonstrating that they were not compatible when COVID-19 impacted source data is utilized. He said that the group may need to consider an alternate base year employment methodology in order to incorporate COVID-19 impacts in the next forecast round.

Mr. Kimberly then shared a draft schedule for the next forecast round that would be compatible with both COVID-19 employment impacts and the 2023 LRTP schedule. He reviewed the release dates of a few alternate sources containing employment data, including the QCEW and the American Community Survey. He noted that advantages of the QCEW include a relatively short lag-time (six months), high resolution (point-level data), and frequency of release (quarterly), and indicated that these characteristics make it a viable component of an alternative base-year employment methodology. He added that while the QCEW does not account for some portions of wage and salary employment (those that are not covered by unemployment insurance), the dataset could be augmented with a complementary source (such as the BLS Current Employment Statistics). Additionally, the American Community Survey contains tables by class of worker for workplace geography that distinguish self-employment from wage and salary workers, and may serve as a potential alternative to the Census Bureau's Nonemployer Statistics. Mr. Kimberly noted that these were just preliminary ideas, and that the group would eventually need to agree to a base-year employment methodology for the next round.

He continued by pointing out that the draft schedule would also provide for the incorporation of demographic data from Census 2020. While the Census Bureau has appealed for a 120 day extension due to COVID-19 related delays, even the postponed release date of the Public Law

94-171 data (redistricting data) of July 31, 2021 would allow for incorporation into the next forecast round – albeit on a tight schedule. Mr. Kimberly explained that the Public Law 94-171 file contains the core demographic data points from Census 2020 needed to set base year demographic data at the jurisdictional and small areas (as the data is provided down to the Census Block). The core demographic data points in the file include: total population; group quarters population (by type); and housing units by occupancy status (households). The small area demographic data from the Public Law 94-171 file will be utilized in the development of new TAZs, based upon Census 2020 geography.

It is expected that local jurisdictions would have all of the data necessary (from a base-year estimate standpoint) to develop their Round 10 forecasts beginning in September 2021. The draft schedule calls for preliminary jurisdictional level totals to be submitted to BMC by the end of October, 2021, with TAZ level forecasts due by the end of February, 2022. This would allow two months for BMC staff review and comment, as well as final adjustments from local jurisdictions. Model input development would take place from May through June, with BRTB endorsement of the dataset anticipated in July, 2022. Mr. Kimberly added that he would distribute the draft schedule to CFG members for their review, and that it could be discussed further at the August meeting of the group.

Mr. Al Sundara, Maryland Department of Planning, said that his agency will be working on updating county level population projections this summer, and that they plan to use the latest data available from the CFG as a base for the control totals for the projection years. Additionally, they expect to work on employment projections at the county level (broken down by industry) later this year. He added that these forecasts have been utilized by CFG members in the past when developing their employment projections. Mr. Sundara expects that the update to their employment forecasts will be available in time for CFG members to reference when working on their own forecasts.

Mr. Jeff Bronow, Howard County Department of Planning and Zoning, acknowledged that the availability of source data may necessitate the development of a new base year employment method, but emphasized that one of the reasons that Mark Goldstein (then with the Maryland Department of Planning) created the current method was to lower base-year employment totals (because of the issue with the jobs / housing ratios in CFG forecasts). The BEA proprietor number was higher than what Mark thought was reasonable, and he felt that the Census Bureau's Nonemployer Statistics figure for self-employment was more appropriate. Mr. Bronow pointed out that while considering alternate base-year employment estimation methods, it will be important to keep in mind that part of the goal in the development of the current method was to bring employment down to a reasonable level. Mr. Kimberly stated that a preliminary analysis comparing the Census Bureau's Nonemployer Statistics data with the self-employment data available from the ACS showed the ACS estimates to be lower.

Mr. Kimberly noted that the MWCoG incorporates data from the QCEW and Current Employment Statistics in their base-year employment estimation methodology to arrive at wage and salary employment, and the ACS to account for the self-employed. Mr. Goodwin added that the MWCoG would be available to present on their base-year employment methodology at the August meeting of the CFG. Mr. Goodwin also noted that the MWCoG

Cooperative Forecasting and Data Subcommittee is developing a Round 9.2 that is expected to be complete in early 2021. The forecast update was characterized as “geographically specific” and will capture adjustments to land use assumptions around new Silver Line Metro stations and in areas in Arlington that will be impacted by the Amazon HQ2. The update will not incorporate Covid-19 impacts or Census 2020 data. That information will be captured in the next forecast round, with a timeline that may be similar to the timing presented in the BMC CFG draft schedule.

4. IMPACTS OF COVID-19 SHUTDOWN ON LOCAL PLANNING AGENCIES: ROUNDTABLE

Mr. Kimberly asked the group to share how the pandemic has affected the operation of their local planning agencies. Are offices open? Partially open? Are there plans in place to physically return to work? Have data requests changed? A roundtable discussion ensued.

Mr. Fisher started by explaining that things have been going very well. He noted that prior to the pandemic nobody in the office was on telework, and that now nearly everyone is working from home. He said that they were able to ramp up telework quickly and efficiently, to a point where they are functioning as well as (if not better than) before. For example, they have streamlined processes, are holding public meetings online (allowing for broader participation), and are working on development applications by appointment or via virtual meetings. He added that management has taken great interest in telework (after having doubts about its effectiveness), and anticipates continuing telework after the pandemic subsides. Additional positions are being filled while office space is running short, fueling interest in continuing remote work.

Ms. Zhao, Baltimore County Department of Planning, explained that she has enjoyed working from home, as it saves approximately two hours of daily commute time and is better for the environment. She noted that the Census outreach efforts have been negatively impacted by the pandemic. Permit applications are being picked-up and delivered to the planning department for review. Planning Board meetings and County Council hearings on comprehensive rezoning have been held online and have become more efficient and productive as a result. Ms. Zhao added that planners involved with development review face the challenge of working with plans that are scanned, noting that it can be difficult to review everything on the computer screen. She added that there have been email communications about safety protocols for returning to work, but that no formal plans or schedules have been shared.

Mr. Cody Spaid, Carroll County Department of Planning, shared that he had similar experiences. He said that there was an initial slowdown of work at the beginning of the pandemic, but that things picked back-up quickly and are up to speed now. He added that they are planning to go back to work one day per week, and that they have a screening process similar to Baltimore County. They plan to have a planner in the office each day, as well as a manager.

Ms. Deborah Grant, Harford County Department of Planning and Zoning, said that they have been working from home and that their department has been holding public meetings virtually, using Microsoft Teams. She said that she did not think they would be returning to the office soon (perhaps September), but that no date had been provided. She added that some employees have returned to the office on occasion, as needed.

Mr. Bronow said that his experience has been similar in Howard County, and that they have been mostly working from home. He stated that they have about 60 people in the department, and about five are in the office at any given time (mainly to pick-up plan sheets). ProjectDox has been helpful in allowing plan review to continue efficiently, as developers can upload their documents electronically. He mentioned that the county is developing a plan for the gradual return of employees, but that if telework is working, there is no reason to come back right away. County offices are closed, but are planned to open after July 6 by appointment only and with safety precautions in place. Jeff added that the county is starting work on the General Plan, and that as part of the process the County Council has to approve the guidelines telling the DPZ how to proceed – including with the public input process. There was a public hearing and work session on the topic this week and a few of the council members do not want to move forward with the General Plan under the current conditions because they feel that the public input process would be hindered, even if done virtually. As a result, the County Council may vote to delay the General Plan when they vote on the topic in July. In addition, it might make sense to delay the plan (six months or a year) so that the impacts of the pandemic are more fully understood.

Steve Cohoon, Queen Anne's County Department of Public Works, said that they are in a different situation. Queen Anne's County is fortunate to have lower numbers of infections, and there is more space to spread out. While it varies by department, Steve said that everyone in DPW is reporting to work every day. They have a screening process in place with a series of questions and temperature checks. The buildings are not open to the public. The permits office has a drop box with a phone connection to talk through any issues with applications, and there is no personal interaction at this point. The professional planners have telework flexibility, and are in the office about half the time. Public meetings are streamed to the public, and the public can call in. Planning Commission meetings have generally involved only the planner and the applicant, with the public asked to call in. The next step for Queen Anne's County will be to determine when building doors will be open to the public, and when meetings will be opened up.

Mr. Sundara said that everyone in his office is working from home. The state office building is open to staff (with temperature checks), but the Secretary of Planning has requested that staff remain at home unless there is an urgent need to go in to the office. The only difficulties with telework have been with the receipt of physical mail (although one staffer is going to the office once per week to scan and send this to employees) and with printing large maps. Even under normal conditions, his staff has little physical interaction with the public, as most data requests are received either electronically or through phone calls. Telework has been proceeding smoothly. Al mentioned that he has been working longer hours than during pre-pandemic times, as access is readily and always available. His office has been utilizing a

variety of videoconference applications to communicate and collaborate with coworkers. Mr. Sundara noted that there has not been a decline in productivity during the pandemic. This may lead to the expansion of telework when offices reopen, assuming state policies permit it. No date has been set for a return to the office.

Greg Goodwin, MWCoG, noted that staff have been working from home since mid-March. It appears that telework will continue for the foreseeable future (into the Fall). Committees have been holding regularly scheduled meetings in a virtual format with good attendance. Greg does not expect there to be in-person meetings until the beginning of 2021. He added that conversations between their member jurisdictions have mirrored those today.

Mr. Kimberly said that BMC staff are all working remotely. He said that the agency held a staff meeting this morning, and that there is no date set for a return. The situation is being monitored, but no plans have been made. He added that all committee meetings and public meetings are being held virtually.

Joel Gallihue, Harford County Department of Planning and Zoning, added that this is an interesting time from the perspective of equity as it relates to community input, and that it is important to consider whether we are reaching the entire population. He added that the pandemic is impacting workflows that depend upon non-web app tools (such as ArcGIS), that function sluggishly online.

5. NEW BUSINESS

Ms. Monica Haines Benkhedda reported that a comment period on the draft 2021-2024 Transportation Improvement Program (TIP) & Air Quality Conformity launched June 16 and will run through July 17, 2020. The draft 2021-2024 TIP includes \$4.26 billion in proposed federal, state and local money for 140 highway, transit, bicycle and pedestrian projects during the next four years. New this year is an interactive project map, where the public can both view projects and offer comments, and a storymap providing an interactive overview of the projects and funding. Those interested in learning more may do so during a virtual public meeting on Thursday, July 9 at 6 p.m. or Tuesday, July 14 at 12:30 p.m. Details about the TIP and how to comment are online at www.baltometro.org.

Mr. Kimberly mentioned that BMC has added the Baltimore Regional Recovery Dashboard to the agency website. While it is in its early stages, it already contains data on transportation impacts, weekly unemployment insurance claims data, as well as a series of analyses on the industry sectors most impacted by the pandemic.

The meeting adjourned at 12:05 P.M.

ATTENDANCE

Members

Jeff Bronow, Howard County Department of Planning and Zoning

Steve Cohoon, Queen Anne's County Department of Public Works
Rick Fisher, Anne Arundel County Office of Planning and Zoning
Joel Gallihue, Harford County Department of Planning and Zoning
Deborah Grant, Harford County Department of Planning and Zoning
Cody Spaid, Carroll County Department of Planning
Al Sundara, Maryland Department of Planning
Kui Zhao, Baltimore County Department of Planning

Staff and Guests

Krishna Akundi, Maryland Department of Planning
Charles Baber, BMC
Blake Fisher, BMC
Greg Goodwin, Metropolitan Washington Council of Governments
Monica Haines-Benkhedda, BMC
Dan Janousek, Maryland Department of Transportation
Zach Kaufman, BMC
Mehdi Khan, Anne Arundel County Office of Planning and Zoning
Shawn Kimberly, BMC
Todd Lang, BMC
Christina Pompa, Anne Arundel County Office of Planning and Zoning