

COOPERATIVE FORECASTING GROUP

Sept 1, 2021

Virtual Meeting

10:02 A.M. to 12:10 P.M.

MINUTES

Mr. Shawn Kimberly, Baltimore Metropolitan Council (BMC), called the meeting to order at 10:02 A.M.

1. APPROVAL OF MINUTES

Mr. Jeff Bronow, CFG Chair, 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. OVERVIEW OF SUPPORTING DATA PROVIDED TO CFG MEMBERSHIP

Mr. Kimberly provided an overview of the demographic and employment data recently finalized and distributed to CFG membership, including details on the distribution of the Master Establishment File and 2020 Census redistricting data. Both of these datasets have been augmented to account for 2020 TAZ structure: each MEF record contains the appropriate TAZ number assignment; and the block level 2020 Census data for population, group quarters population, and households has been aggregated from Census block to 2020 TAZ geography. He asked if there were any questions or comments about the content of the files or in accessing the files. Hearing none, he added that membership can contact him with questions as they arise.

Mr. Bronow asked if this is the first time the Census Bureau has utilized Differential Privacy to protect respondent confidentiality.

Mr. Kimberly said that it was the first time that Differential Privacy had been implemented, but that other methods (including data swapping and table suppression) had been applied in previous censuses.

Mr. Bronow asked if the Census 2020 data summarized to TAZ by BMC staff and sent to the CFG members was created by aggregating the census block data to TAZs, and if there were any cases where a TAZ cut through a block.

Mr. Brian Ryder, BMC staff, clarified that that was the approach, and that no blocks were cut.

3. PRELIMINARY FINDINGS FROM THE 2020 CENSUS REDISTRICTING DATA RELEASE

Mr. Kimberly provided an explanation of the purpose and contents of the Census Bureau's redistricting data file PL 94-171, the first release of data from the 2020 Census at detailed geographies (down to the block level). He then provided regional and jurisdiction level summaries of selected demographic data points including: total population and population change between decennial censuses from 1980 through 2020; average household size; and population by race and Hispanic origin. He also included charts illustrating CFG population forecasts for year 2020 from historical forecast rounds, compared with 2020 Census figures.

Over the course of the last decade, the population of the Baltimore region increased by 134,000 (4.9%), to a total of 2,844,510 in 2020. The region's rate of growth from 2010 to 2020 was slower than both the state and the nation, which experienced 7.0% and 7.4% growth, respectively. Mr. Kimberly noted that the share of total state population that the region accounts for has been declining over time. Currently the Baltimore region's share of state population sits at 46.0%, down from 53.3% in 1970.

The size of households has continued to decrease in the region, but the reduction has slowed dramatically since 2000. From 1990 to 2000 the average household size decreased from 2.64 to 2.55. In the 20-years since then, the region's average household size has experienced only minor declines, reaching 2.54 in 2010 and 2.53 in 2020.

The race and Hispanic origin data indicates that the region and the component jurisdictions have all become more diverse over the past 20 years. At the regional scale, the share of persons identifying as white alone, not Hispanic, declined from 66.3% in 2000 to 52.7% in the 2020 Census. While the racial and ethnic diversity of populations differs between each of the region's component jurisdictions, the share of persons identifying as white alone, not Hispanic declined in each.

Mr. Kimberly shared a chart comparing historical population forecasts for year 2020 with the recently released 2020 Census data. The chart illustrated that at the regional level, the CFG forecasts for year 2020 have been within 4.0% of the 2020 decennial census figure since round 5D was approved in 2002.

[PowerPoint: 2020 Decennial Census Data- Jurisdictional Level Summaries of the Redistricting Data File (PL 94-171)]

4. OPEN DISCUSSION: METHODS TO SUPPORT THE DEVELOPMENT OF ROUND 10 ESTIMATES AND FORECASTS

Mr. Kimberly kicked off an open discussion on methodologies used in the development of CFG estimates and forecasts. Multiple CFG members had expressed interest in learning more about the details of the processes and methods that their peers utilize in the development of

estimates and forecasts. This item provided an opportunity to ask specific questions, and to facilitate further communication on this topic between CFG members.

Ms. Kathleen Comber asked if an example can be provided of the format in which the Round 10 data should be submitted, and asked about the Regional Planning District (RPD) geography.

- Mr. Kimberly said that the data should be presented in table format (people might use excel or GIS), containing four data points for each Transportation Analysis Zone (TAZ): total population; group quarters population; households; and total employment. Those datapoints are needed from 2020 through 2050, broken-out into five year increments. He added that the CFG does not need to report the data at the RPD level, and explained that RPDs are aggregations of TAZs (which nest within RPDs).

Mr. Bronow asked for clarification on the employment datapoint, noting that prior to the most recent forecast rounds, CFG membership was required to provide a split between retail and non-retail employment categories.

- Mr. Kimberly said that the CFG is required to submit only figures for total employment. He added that BMC staff will apply employment by industry ratios (developed from the Master Establishment File) to the CFG total employment estimates and forecasts to create the employment by industry mix required by the travel demand model.

Mr. Bronow said that he has been thinking about how the 2020 Census is showing slowed growth rates for all BMC Counties, including Howard County. He added that Howard County is running out of land, and that growth will lean toward redevelopment. That is a different kind of thinking than in the past, when there was plenty of buildable land and growth projections were a bit more straightforward.

One of the major growth areas is the Gateway area, which is located at Snowden River Parkway, 175, and I-95. He added that if the decision was to redevelop that large area, then that is where much of their future growth would go. However, Jeff noted that there is recognition that they would need to do a master plan for the Gateway first. So, a question is whether or not to include the Gateway in the general plan. They do anticipate doing a master plan for the Gateway, but are uncertain about its inclusion in the general plan. If the intent is to build Gateway, then they would likely include it stretching through 2050. Otherwise they would show little growth for 20 years, as land is running out and growth would end in 2030 or 2035. He said that at some point, as the group continues to work on Round 10, he would like to hear from other counties about what their thinking is on this topic.

- Following-up on Mr. Bronow's point about the role of redevelopment in their planning and forecasting processes, Mr. Kimberly noted that Baltimore City has likely been considering growth through infill development in their forecasts for some time.
- Mr. Bronow said that a large part of the purpose of the projections is for transportation planning. To leave Gateway out would not be good in terms of long-term transportation planning, and for accessing state funds for improvements to I-95 and 175, for example.

Jeff noted that one possibility would be to create one set of projections for BMC use, and a separate set for their school system, for example.

Noting that Carroll County experienced growth of 5,000 people from 2010 to 2020, Mr. Bronow asked how they envision their growth for the next 20 years.

- Ms. Comber provided some background on their projection methods, and said that they utilize the county's buildable land inventory (BLI) to inform the process. The BLI provides estimates for land that is available for development, and considers the type and use constraints upon the land based largely upon an analysis of the county zoning code. The occupancy rate and water / sewer capacity are also considered.

Ms. Comber asked, if it would be reasonable to compare Carroll County's projections with the county projections provided by the state?

- Mr. Al Sundara, Maryland Department of Planning (MDP), said that generally his agency uses the estimates and forecasts provided by the CFG. He added that the State Data Center develops their own independent projections in cases where those submitted do not seem reasonable enough, and in cases where a jurisdiction does not provide the information.

Ms. Comber asked about how to project group quarters population by group quarters type.

- Mr. Bronow said that what they have done in the past is to contact the largest group quarters facilities in the county and ask them directly about their plans for growth.

Ms. Deborah Grant asked, if anyone in the group uses CommunityViz to help with an inventory kind of prediction?

- Mr. James Wilkerson said Howard County is utilizing CommunityViz to help with their general planning process. For the Round 10 forecast, they are going to use their traditional methodology (used in previous rounds), and utilize the CommunityViz output to ensure that the Round 10 figures are in-line with the general plan. With CommunityViz, they can consider various growth conditions by parcel, as a variety of metrics have been programmed into the model based upon zoning. Mr. Wilkerson noted that CommunityViz is particularly useful in terms of identifying infill and redevelopment potential, as the traditional methods are sometimes too generalized to do so effectively.

Ms. Grant asked if anyone in the group put together a model that they use in Excel that helps with the forecasting process, and asked what they use as a starting point.

- Ms. Kui Zhao said, that she doesn't have an Excel model for this purpose. She added that they take into consideration many sources and datapoints including decennial census data, Baltimore County's own estimates, analyses of occupancy and razing permits, and approved plans for both residential and non-residential uses. She said that additional factors include input from the economic development agency, the elected official's perspective, and comparisons with the historical forecasts.

Ms. Grant asked group members how they begin the forecasting process. What is the first datapoint or number that the group looks at?

- Ms. Comber asked if it would be reasonable to use the TAZ 2020 data as a starting point for the projections.
- Mr. Kimberly said that he believes it would make a lot of sense to make direct use of the decennial census data, especially considering that the Round 10 base-year is 2020. He added that he does not know of a better source for population, group quarter population and household figures for year 2020.

Mr. Wilkerson said that they have historically used the Census Bureau's Nonemployer statistics dataset to account for non-salaried non hourly employees in the projections. The latest release of the data was 2018, and the Census website has stated since May that the next release is pending. Does anyone have any information on when updated data will be released?

- Mr. Kimberly said, that the Nonemployer statistics data typically has a two year lag. He added that with round 10, the jurisdiction level employment totals that were presented in June used the ACS self-employment figure instead of the Nonemployer statistics data (as had been used in previous rounds).

Ms. Comber asked, how the group spatially allocates self-employment data.

- Mr. Kimberly said that the allocation of self-employment would be a great topic for group discussion. He noted that the allocation of self-employment is not necessarily handled consistently across the group. He added that self-employment represents a relatively small share of employment, and that the work locations of the self-employed could be from home, from an off-site office space, or could vary from day to day. Some group members might allocate self-employed to concentrations of residential development, while others might not differentiate the self-employed from wage and salary workers - and allocate all employment with the MEF.

Ms. Comber asked, how are other members allocating, and projecting future employment by TAZ?

- Ms. Zhao said that they are based largely upon the analyses of occupancy and zoning permits, and consideration of approved plans as far into the future as possible. She added that the key to the allocation is the MEF. Ms. Zhao noted that the employment forecasts become more difficult the further into the future you go. She said that institutional knowledge, historical trends, and current zoning also help to figure things out. Ms. Zhao asked Ms. Comber to contact her to discuss further details and for links to specific data.

Ms. Comber asked about the control totals that are due in October.

- Mr. Kimberly said that Round 10 schedule calls for TAZ level estimates and forecasts to be submitted by January 15, 2022. He added that jurisdiction level control totals are due to BMC by October 31. He explained that it is helpful for BMC staff to have a preliminary indication of what the CFG expects growth to look like through the 2050 forecast horizon. The submission should include jurisdiction level figures for total population, households, and employment in five-year increments from 2020 through 2050. He said that the October submission is understood to be in draft form, and that it is not required that the figures exactly match those that are due on January 15.

5. NEW BUSINESS

Mr. Sundara said that the SF 1 data from the 2020 decennial census will be released sometime in 2022.

The meeting adjourned at 12:10 P.M.

ATTENDANCE

Members

Krishna Akundi – Maryland Department of Planning
Jeff Bronow, Howard County Department of Planning and Zoning
Kathleen Comber, Carroll County Department of Planning
Lynda Eisenberg, Carroll County Department of Planning
Rick Fisher, Anne Arundel County Office of Planning and Zoning
Deborah Grant, Harford County Department of Planning
Sara Paraniyam, Baltimore City Department of Planning
Alfred Sundara, Maryland Department of Planning
James Wilkerson, Howard County Department of Planning and Zoning
Jamie Williams, Baltimore City Department of Planning
Kui Zhao, Baltimore County Department of Planning

Staff and Guests

Shawn Kimberly, BMC
Charles Baber, BMC
Crystal McDermott, BMC
Brian Ryder, BMC