



Metropolitan Washington  
**Council of Governments**

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## **ROUND 9.0 TRANSMITTAL LETTERS**

**AS OF NOVEMBER 13, 2015**



Office of the Director

To: Mr. Paul DesJardin  
Planning Section Manager  
Metropolitan Washington Council of Governments

A handwritten signature in black ink, appearing to read 'Eric D. Shaw'.

From: Eric D. Shaw

Re: Round 9.0 Cooperative Forecast

Date: October 7, 2015

The Office of Planning in fulfillment of its responsibilities to the Metropolitan Washington Council of Governments (MWCOG) Cooperative Forecasting and Data Subcommittee is submitting its Round 9.0 forecasts. The figures are based on recent economic and demographic trends, residential and commercial projects recently completed, projects under construction, projects in pre-development, and the capacity of the remaining developable land. In addition, significant changes were made to the employment forecast as compared to the previous forecast to reflect a changed methodology in determining the number of self-employed and a revision of the base transportation analysis zone (TAZ) allocations to reflect new information.

The Office of Planning (OP) Citywide Planning and State Data Center Divisions prepared the District of Columbia forecasts of population, households, and employment in five-year intervals through 2045. These forecasts involve the use of certain assumptions about future events that may or may not occur. Users of these forecasts should be aware that although they have been prepared with the use of detailed methodologies and with extensive attempts being made to account for demographic patterns, they may not accurately reflect the future population of the District or of particular Transportation Analysis Zones (TAZs) in the District due to some degree of uncertainty in projecting future activities.

### **Short and Long-term Growth Assumptions**

The Round 9.0 forecast was derived using various assumptions that may impact population, households and employment in the short-term (2010-2025) and long-term (2025-2045).



### Housing and Households:

- Record absorption of multi-family rental units decreasing vacancy and a large and increasing pipeline of new units in predevelopment;
- Strong private sector job growth, even with the uncertainty of the federal budget and procurement process;
- The growing perception of the District as a world capitol that attracts foreign labor;
- An expanding number of neighborhoods where rents and prices justify expensive high-rise constructions;
- Increasing average household sizes as the large numbers of recent millennial arrivals stay in the District to start families and older households seeking to down size resulting in a turnover in the single-family housing stock.

### Population:

- Population growth will continue at a slightly slower pace than the last four years;
- Number of births are expected to stay relatively constant as the population increases reflecting gradually declining fertility rates;
- Mortality rates are expected to continue declining slightly, resulting in a significant net natural increase in population;
- Abundance of choices for transportation, entertainment, leisure, education, health, housing, food will continue to attract and maintain more people;
- Improved public school performance and government initiatives like universal pre-K will continue to attract and retain a greater percentage of families with children; and
- Group quarters population will increase slowly as colleges add dorms and the aging population move into long-term care facilities.

### Employment:

- The national economy will continue to grow slowly in the short run but will pick up speed after 2015;
- After the current Federal instability slowing job growth through 2015 ends, the District will return to historic patterns of job growth, but with a greater emphasis on private sector jobs;
- New job opportunities will continue to attract young professionals, while retiring baby boomers will attract middle aged workers to fill vacant senior positions;

- Growth in sectors like professional and business services, retail and accommodations and education and health services will continue to dominate job growth in the District;
- Office vacancy will continue to decline, but shifts in telework and hoteling office spaces will reduce the number of gross square feet required per office job; and
- Finally, employment will disperse and grow throughout District neighborhoods as the trend toward ground and second floor uses within multi-family development continues.

The major growth projects in Round 9.0 include the following: NoMa (TAZ 197, 201, 204, 205, 206, 282, 283), City Center (TAZ 24, 25), St. Elizabeth's (TAZ 358, 360), Buzzard Point (TAZ 361); Capital Riverfront (TAZ 365, 367, 368, 372), Walter Reed (TAZ 118), McMillan Reservoir (TAZ 168), and Southwest Waterfront (TAZ 382, 383, 384, 385)

Perhaps the most significant shift in the District's growth is high-rise developments recently proposed in neighborhoods where demand would not have previously justified expensive steel and concrete construction. The most notable example of this is at the Rhode Island Avenue Metro stations (TAZ 219). In addition, the District continues to seek opportunities for appropriate growth near transit infrastructure such as land use changes in the Mid-City East and Southwest Small Area Plans (TAZ 203 and 370 respectively).

Household growth by TAZ is a direct result of new residential developments projects, whereas population shifts are due to increase births across the city and the internal migration of new families from multi-family housing in central Washington to mainly single-family neighborhoods such as the Georgia Avenue and Petworth neighborhoods and others. All projects were examined to assess the relationships among data for population, households, and employment given information on actual, planned, or proposed scenarios that may affect their outcomes.

In comparing the new forecast Round 9.0 to the past Round 8.3, as shown in the table below, changes were made to all three forecasts. Population and households are expected to grow at slightly faster rates than Round 8.3, while total employment will be less up to 2025 only due to revised self-employment numbers until growth exceeds previous forecasts after 2025.

Population growth from 2010 through 2045 is projected to increase by 384,441 people or 10,984 people annually, over this 35-year period. Since 2010, the average annual population growth was approximately 13,610 people, however, this number is expected to decline slightly as the national economy becomes more stable and other areas of the country attract new residents as well.

Due to the strong demand for housing after the 2008-2009 economic recessions, households are forecasted to increase by almost 130,000 in the 35-year period through 2045. This is 25,000 more households than previously predicted. Household size is expected to increase from 2.11 to

2.27 as more families choose to stay in the District. The District has even taken steps to protect the single-family housing stock to encourage this trend.

On the employment front, several new under-construction and planned projects such as the commercial projects at City Center, NoMa/Union Station projects, Capitol Crossing, federal and District Government projects at St. Elizabeths and upcoming projects at the Southwest Waterfront and the Capital Riverfront are earmarked to add a range of office and mixed-use jobs. But continued mixed-use development will disperse employment growth into many neighborhoods. Employment is forecasted to reach the one million mark by 2040 and continue to increase through 2045, which is a 40.0 percent increase over the 2010 number of 753,230 employees (including the self-employed). In comparing Round 9.0 to the previous Round 8.3, the pattern shows more aggressive employment reflecting the private sector’s ability to add jobs at a significant rate despite the recent uncertainty of the federal budget growth.

Round 8.3 Approved	2010	2015	2020	2025	2030	2035	2040	2045	2010-2040	Percent Change	Annual Rate
	Population	601,767	660,531	715,497	764,270	808,721	852,431	883,571		281,804	46.8%
Employment	783,457	814,957	861,939	905,846	944,096	972,955	1,001,814		218,357	27.9%	0.8%
Households	266,707	287,112	305,552	323,191	340,312	356,923	370,758		104,051	39.0%	1.1%
Jobs/Household Ratio	2.94	2.84	2.82	2.80	2.77	2.73	2.70				
Group Quarters Population	40,021	43,889	47,846	49,065	50,041	51,013	52,658		12,637	31.6%	0.8%
Average Household Size	2.11	2.15	2.19	2.21	2.23	2.25	2.24				
<b>Round 9.0 Submitted</b>											
	2010	2015	2020	2025	2030	2035	2040	2045	2010-2045	Percent Change	Annual Rate
Population	601,767	668,489	726,508	784,374	840,154	892,150	939,179	986,208	384,441	63.9%	1.4%
Employment (Rev. Base)	753,230	805,630	854,166	902,493	947,968	988,274	1,021,791	1,055,309	302,079	40.1%	1.0%
Households	266,707	295,360	318,012	340,566	361,790	380,601	396,244	411,887	145,180	54.4%	1.2%
Jobs/Housing Ratio	2.82	2.73	2.69	2.65	2.62	2.60	2.58	2.56	2.08		
Group Quarters Population	40,021	43,889	47,846	49,065	50,041	51,013	52,658	53,025	13,004	32.5%	0.8%
Average Household Size	2.11	2.11	2.13	2.16	2.18	2.21	2.24	2.27			

### Source of Data

The forecast uses U.S. Census Bureau 2010 data as the base for our population and household forecasts, and the American Communities Survey in conjunction with the Office of Planning’s development tracking database and the Department of Health births and deaths data to revise the forecast for 2015. A revised jobs base both citywide and at the TAZ level was derived from the Department of Employment Services ES-202 and QCEW data, LODES and InfoUSA business and employment data as checks and balances to our analyses including employees per square foot and built capacity. Bureau of Labor Statistics (BLS) Current Employment Statistics from 2010 to 2014 was used to revise the forecast for 2015.

We also gathered information from Business Improvement Districts, universities and hospital/healthcare employers, and from other specialized sources, such as the Military Active Duty Family File, Appropriated Civilian Installation Report, and Foreign Nationals Civilian Installation Report provided by the Census Bureau. We verified locations of employers using geocoding, imagery and Google Maps, and by researching on the employer websites.

Each data source was edited and geocoded, then overlaid with the other sources. Where no geocode could be calculated, we researched employer records individually and input addresses manually. The main complications in properly locating employers came in three forms:

- 1) Employers with high numbers of delivery/service locations generally had one contact address for their employees. Example: building security and operations support staff such as laundering services, etc.
- 2) Employers with large numbers of locations all assigned to one address. Example: small franchises, such as Quiznos and CVS.
- 3) Employers with large building/campus footprints, which were split by TAZ boundary lines.

We prioritized the TAZ based on the total number of employees. Most of the TAZ were researched extensively. Once the lines of “reasonable” were established for an employment count, we used Google Maps, internet research, third-party data, and employer contacts to get as close to an exact number as possible. Each TAZ was then evaluated on a case-by-case basis to determine which data sources best described the employment base and which data would either support these conclusions or demand further research. We leveraged local knowledge and internal contacts at many agencies and organizations. In some cases we contacted employers directly.

The reduction in the total employment for the District from Round 8.3 was due to updated estimates of the self-employed population, which were probably overestimated in past forecasts. The assumption used in Round 8.3 – that the self-employed count was approximately 60,000+ – is no longer used or supported by the Department of Employment Services. American Community Survey estimates place the number of self-employed closer to 25,000 on average. The Census Bureau’s non-employer statistics, which seems to consist mainly of the self-employed, placed the District number at 52,000 in 2013. Further, our research revealed that approximately 17.6 percent of incorporated self-employed, and 23.2 percent of the unincorporated self-employed, worked from their dwellings. We used these proportions to derive the subset of self-employed from the non-employer statistics. The results gave us an annual average of about 41,000 self-employed persons in the District.

Altogether, the forecast is for continued growth in the national and local economy. This forecast is generally consistent with the employment growth forecast from other agencies. The Office of Revenue Analysis, with which we had discussions, has a slightly more conservative forecast to ours. However, the George Mason University group forecast is slightly more aggressive than our forecast. A certain degree of uncertainty must be admitted due to instability within the federal budget and procurement processes that can derail the predicted path of the indicators, but we are confident that given the information available at present, this is the best estimate of our population, household, and employment numbers through 2040.

Thank you and we look forward to working with COG and member jurisdictions on refining our cooperative forecasts.



*Charles County Government*  
**DEPARTMENT OF PLANNING &  
 GROWTH MANAGEMENT**

**CHARLES COUNTY COMMISSIONERS**

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*Michael D. Mallinoff*  
*County Administrator*

*Peter Aluotto, Director*

October 8, 2015

Mr. Paul DesJardin  
 Director Community Planning and Services  
 Metropolitan Council of Governments  
 777 North Capitol Street, NE Suite 300  
 Washington, DC 20002

RE: Round 9.0 Jurisdictional Totals for Charles County

Dear Mr. DesJardin:

Enclosed are the proposed countywide forecasts of population, households, and employment for the Round 9.0 Cooperative Forecasts. These estimates are the result of the most comprehensive evaluation of the existing and planned development at the TAZ level that has been performed in more than a decade. The resulting countywide growth rates are not too dissimilar from those in Round 8 or Projections made by the Maryland Department of Planning (MDP). However, the adjustments at the TAZ level have been extensive based on a data from the County's GIS program and a TAZ by TAZ evaluation of planned employment generators and realistic residential development potential.

**Residential Projections**

We established 2015 dwelling unit base for each TAZ using the County's GIS data (MD Dept. of Assessments and Taxation). All residential development planned, but not built in the County was identified by the TAZ level. The most probable build out of the planned, pending, and approved projects was determined following build out rules. In addition, residential growth not currently planned including minor subdivisions and infill lots were accounted for by taking into consideration population projections performed by MDP.

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Mr. Paul DesJardin  
Round 9.0 Jurisdictional Totals for Charles County  
October 8, 2015

### Employment Projections

The baseline employment for 2010 and 2014 was based on the methodology recommended by MWCOG using available wage and salary employment, self-employment factors and military employment. All non-residential development planned, but not built in the County was identified by the TAZ level. The most probable build out of the planned, pending, and approved projects was determined following build out rules. Average employment generation rates were applied to planned non-residential development by either square footage or acreage factors for each TAZ. The Self-employed factor was applied to each TAZ proportional to the number of households in the TAZ.

The following table presents the County's proposed Round 9.0 control totals for population, employment, and households.

**Round 9.0 Cooperative Forecast for Charles County**

	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>	<u>2040</u>	<u>2045</u>
<b>Employment</b>	45,856	46,595	46,977	49,217	52,187	55,366	58,754	61,508
<b>Household Population</b>	145,146	149,377	165,632	176,834	193,267	206,115	217,171	235,075
<b>Total Population</b>	146,551	150,782	167,037	178,239	194,672	207,520	218,576	236,480
<b>Total Households</b>	51,225	53,659	60,302	65,529	72,911	78,606	83,426	92,166

We are refining our TAZ level employment projections to include a breakdown of office, retail, industrial and other for the next Round 9.0 submission. If you have any additional questions, please contact me at 301-396-5814.

Sincerely,



Jason R. Groth

Chief, Resource and Infrastructure Management

Cc: Steve Ball, Director of Planning  
Greg Goodwin, Senior Regional Planner, Metropolitan Washington Council of Governments



# FREDERICK COUNTY GOVERNMENT

## DIVISION OF PLANNING & PERMITTING

Jan H. Gardner  
County Executive

Steven C. Horn, Division Director

November 3, 2015

Mr. Paul DesJardin  
Director Community Planning and Services  
Metropolitan Washington Council of Governments  
777 North Capital Street, NE  
Washington, DC 20002

RE: Round 9.0 Jurisdiction Totals for Frederick County

Dear Mr. DesJardin:

This letter summarizes Frederick County's Round 9.0 control totals in Households, Population, and Employment. Round 9.0 controls are based on two major changes. Since 2011, the County has seen an upward trend in building-permit activity for new residential dwellings with the City of Frederick accounting for most of the activity in 2013 and 2014. Second, we are changing our baseline employment for 2010 after acquiring new data sources previously not available, which means employment forecasts will reflect new totals that are slightly higher than Round 8.3 totals.

### **Households and Population**

Revisions to our households and population are based on top-down and ground-up approach to establish our control totals. We used GIS data by TAZ to establish household numbers for 2015. For the forecast periods we projected the build-out of approved developments in our pipeline focusing on the growth areas of Ballenger Creek, Urbana, and Linganore/New Market. Municipal level information on construction of new residential building permits was also gathered to include in the household base. For the forecast periods we used the average household size assumption from the Maryland Department of Planning projections.

### **Employment**

Frederick County's employment control totals are based on information derived from newly acquired data sources previously not available. Subsequently, the base year and forecasts employment have changed and currently show greater increases than Round 8.3. Once we begin the next phase looking at the TAZ level we expect the overall job numbers to come down some. Changing our base year employment was based on the information from IHS-Global Insight and in applying COG's adjustment factors to capture self-employed segments not included in previous sources. Other sources used include:



# FREDERICK COUNTY GOVERNMENT

## DIVISION OF PLANNING & PERMITTING

Jan H. Gardner  
County Executive

Steven C. Horn, Division Director

- U.S. Bureau of Labor Statistics (BLS) - Quarterly Census of Employment and Wages (QCEW);
- Maryland Department of Labor and Licensing, and Regulations (DLLR), quarterly and annualized count of employment;
- U.S. Bureau of Economic Analysis;
- Employment data from the 2013 American Community Survey (ACS) on class of workers; and
- County's database on commercial development activity.

Further, we are maintaining our prior method in capturing military jobs which relied on contacting the public relation officer at Fort Detrick. The Military job included in our count comprised of total military personnel assigned to active duty stationed in Fort Detrick, Camp David and recruiting centers in the County. Military reserve units in the National Guard that meet regularly were also included.

### FREDERICK COUNTY TOTALS (Includes the City of Frederick)

YEAR	EMPLOYMENT	POPULATION	HOUSEHOLDS	HOUSEHOLD POPULATION	GROUP QUARTERS
2010	102491	233385	84800	229203	4182
2015	106357	246501	89462	242244	4257
2020	111461	267784	99010	263367	4417
2025	116477	288692	107934	284275	4417
2030	125698	303589	115066	299172	4417
2035	133084	319363	121133	314946	4417
2040	139193	332153	126539	327736	4417
2045	144284	344140	131167	339723	4417

Please do not hesitate to contact me directly if you have questions to all above.

Sincerely,

James Gugel  
Planning Director  
Department of Planning  
Frederick County Division of Planning and Permitting  
30 N. Market St.  
301-600-1144

Randy McClement  
Mayor



*Aldermen*  
Kelly M. Russell  
President Pro Tem  
Michael C. O'Connor  
Philip Dacey  
Joshua Bokee  
Donna Kuzemchak

October 20, 2015

Mr. Paul DesJardin  
Director of Community Planning and Services  
Metropolitan Washington Council of Governments  
777 North Capital Street, NE  
Suite 300  
Washington, DC 20002

**RE: Round 9.0 Jurisdictional Totals for The City of Frederick**

Dear Mr. DesJardin:

Thank you for the opportunity to provide The City of Frederick's Round 9.0 Cooperative Forecasts for Households, Population and Employment. The City has analyzed 29 transportation analysis zones (TAZ) as part of this forecast. The City's political boundaries do not align exactly with MWCOG's TAZ system and therefore ten of the City's TAZs have been split with Frederick County. An additional TAZ will need to be split in future rounds due to a fairly recent annexation by the City.

The methodology used in developing our forecasts is consistent with the methodology used in prior forecasts. Information representing both households and employment was derived from a wide range of data sources used to adjust the City control totals including the City's residential development pipeline, permitting data, ReferenceUSA/InfoUSA data, as well as available U.S. Census Bureau data. The control totals were also developed with the assistance and coordination of Frederick County staff. This submission therefore reflects changes in the incremental totals for Households, Group Quarters, Population, and Employment.

	<b>EMP</b>	<b>TOTPOP</b>	<b>HHs</b>	<b>HHPOP</b>	<b>GQ</b>
<b>2010</b>	46900	65239	25352	63454	1785
<b>2015</b>	48514	70428	27269	68568	1860
<b>2020</b>	51015	79364	30863	77344	2020
<b>2025</b>	52697	86989	34117	84969	2020
<b>2030</b>	56853	89574	35242	87554	2020
<b>2035</b>	58228	91146	35913	89126	2020
<b>2040</b>	63793	92849	36631	90829	2020
<b>2045</b>	66897	93105	36745	91085	2020

Individual TAZ level data will be provided in a future submission and may result in adjustments to the control totals provided. For further questions and to answer any questions to the above, please feel free to call me at (301) 600-1655.

Sincerely,



Joseph A. Adkins  
Deputy Director of Public Works for Planning

cc: Jim Gugel – Frederick County Government, Department of Planning  
Dial Keju – Frederick County Government, Department of Planning  
Richard Griffin – The City of Frederick, Department of Economic Development  
Matthew Davis – The City of Frederick, Division of Planning  
Jeffrey Love – The City of Frederick, Division of Planning



**MONTGOMERY COUNTY PLANNING DEPARTMENT**  
 THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

October 28, 2015

Paul DesJardin  
 Director of Community Planning and Services  
 Metropolitan Washington Council of Governments  
 777 North Capitol Street, N.E., Suite 300  
 Washington, DC 20002

Dear Paul:

This letter is to inform you of Montgomery County’s Round 9.0 Cooperative Forecast control totals for at-place employment, population, and households. The results of the Round 9.0 forecasts are shown in the table below (Table1).

**Table 1. Montgomery County Employment, Population, and Household Cooperative Forecasts, Round 9.0**

Round 9.0	Year								2010 to 2045	
	2010*	2015	2020	2025	2030	2035	2040	2045	Change	% Increase
At-Place Employment	493,500	517,800	541,700	570,400	603,600	641,000	682,800	728,900	235,400	47.7%
Total Population	971,777	1,036,700	1,073,000	1,112,000	1,153,000	1,195,000	1,234,000	1,269,500	297,723	30.6%
Households	357,086	380,200	396,800	414,300	431,300	447,000	459,700	470,700	113,614	31.8%

\* 2010 population and household estimates are for April. The 2015 to 2045 forecasts reflect January of the year.

Source: Montgomery County Planning Department, M-NCPPC.

Employment

We forecast at-place employment to increase by 235,400 jobs, or 47.7%, in the thirty-five year period from 2010 to 2045. The Round 9.0 at-place employment forecast for Montgomery County shows growth, but at a more modest pace than the prior Round 8.4 forecast. Whereas the Round 8.4 forecast showed employment growth of about 204,800 jobs between 2010 and 2040, the new forecast shows a more tempered growth of 189,300 for the same period. When the forecast rounds are compared by 5-year intervals, the Round 9.0 forecast is between -2.7% to -5.0% lower than the Round 8.4 forecast (see Table 2).

Table 2. Comparison of Montgomery County At-Place Employment Forecasts, Rounds 9.0 and 8.4

	Year								2010 to 2040	
	2010	2015	2020	2025	2030	2035	2040	2045	Change	% Increase
At-Place Employment										
Round 9.0	493,500	517,800	541,700	570,400	603,600	641,000	682,800	728,900	189,300	38.4%
Round 8.4	510,300	532,000	564,400	598,800	635,300	674,000	715,100		204,800	40.1%
Difference Between										
Rounds 9.0 and 8.4	(16,800)	(14,200)	(22,700)	(28,400)	(31,700)	(33,000)	(32,300)	-	(15,500)	
Percent Change Between	-3.3%	-2.7%	-4.0%	-4.7%	-5.0%	-4.9%	-4.5%	-	-7.6%	

Source: Montgomery County Planning Department, M-NCPPC.

The Round 9.0 forecast also differs from prior forecast rounds in that it employs a new methodology and factors to calculate total employment. The Round 9.0 forecast of wage and salary jobs was developed using a shift-share method. Inputs used include employment estimates change by industry at the County-level and Transportation Planning Board (TPB) regional-level from 1990 to 2000, which the Planning Department staff assumes will be more indicative of future industry trends. More recent employment data by industry that included the lead up to, and actual, 2007 to 2009 “great recession” were not used since this recession was assessed to be an anomaly. Although we expect cyclical recessions to occur in the future, staff does not foresee another “great recession” that is exceptionally prolonged and severe occurring in the thirty-five year forecast horizon. Thus, staff did not model the industry shifts occurring just before, during, or immediately after the “great recession” in the shift-share calculations. In addition, the shift-share model included additional input data of expected employment industry shifts from MWCOG’s econometric model forecast for the TPB region.

Another methodological change for Round 9.0 is the application of factors developed by MWCOG to calculate jobs in addition to wage and salary employment covered by unemployment insurance. The Planning Department relies on historical and current Quarterly Census of Employment and Wages (QCEW) data from the Maryland Department of Labor, Licensing, and Regulation’s (DLLR) for employment information, but this data does not include employees not covered by unemployment insurance *or* the self-employed. The MWCOG developed factors to fill-in this gap. These factors were outlined in an October 1, 2015 memorandum entitled “Suggested Approach for Preparing Baseline Employment Estimates” that was sent to the members of the Cooperative Forecasting Subcommittee. The memorandum outlined a factor of 1.045 that should be applied to QCEW employment in order to calculate wage and salary jobs both covered *and* not covered by unemployment insurance. Examples of jobs not covered by unemployment insurance would include persons working for religious institutions or elected officials. Additionally, to this product (covered jobs \* 1.045) the memorandum specifies that a factor of 1.06 should be applied to arrive at self-employed jobs, jobs covered by unemployment insurance, and not covered by unemployment insurance.

Lastly, to this product should be added non-civilian military personnel.

Finally, staff made assumptions about the construction of transformative capital transportation projects, such as the Purple Line, the Corridor Cities Transitway (CCT), and Bus Rapid Transit (BRT). Round 9.0 assumes that the development of light rail and bus rapid transit will lead to economic and employment growth by efficiently connecting workers to jobs, allow existing commercial area with greater access to workers to attract new employers, and this in turn will lead to vacancies declining in those areas and spur new construction. The forecast assumes that the Purple Line will be operational by 2021; that the CCT phase I will be complete by 2030 and Phase II by 2035; and that the rest of the BRT system will be functioning by 2040.

### Population

The Round 9.0 population forecast projects a gain of about 298,000 people between 2010 and 2045, a 31 percent increase over the 35 year period. The table below summarizes the 5-year incremental change of the Round 9.0 population forecast compared to the previous Round 8.4 (Table 3). The higher population projection in Round 9.0 is attributed to using a larger base population in 2015 and applying higher growth rates after 2030 compared to Round 8.4. This round's 2015 population reflects the latest U.S. Census Bureau's estimates of population growth between 2010 and 2014. We found that during the Great Recession there was a drop in domestic outmigration, but the foreign in-migration remained at pre-recession levels. Few were able to sell their houses and find job opportunities elsewhere. We also experienced higher household sizes as people doubled up. These two trends led to an increase in population by 2015 that was unanticipated in the previous forecast.

Table 3. Comparison of Montgomery County Total Population Forecasts, Rounds 9.0 and 8.4

	Year								2010 to 2040	
	2010*	2015	2020	2025	2030	2035	2040	2045	Change	% Increase
Total Population Round 9.0	971,777	1,036,700	1,073,000	1,112,000	1,153,000	1,195,000	1,234,000	1,269,500	262,223	27.0%
Round 8.4	972,600	1,020,000	1,067,000	1,110,000	1,153,900	1,184,600	1,203,000		230,400	23.7%
Difference between Rounds 9.0 and 8.4	(823)	16,700	6,000	2,000	(900)	10,400	31,000	-	31,823	
Percent Change between Population Forecasts	-0.1%	1.6%	0.6%	0.2%	-0.1%	0.9%	2.6%	-	13.8%	

\* 2010 population and household estimates are for April. The 2015 to 2045 forecasts reflect January of the year.

Source: Montgomery County Planning Department, M-NCPPC.

The Round 9.0 population forecast utilizes an age cohort-component method and assumptions based on historical demographic trends. The population projection captures the dynamics of County level natural increase (births and deaths) and net migration. The cohort-component model starts with an estimated base household



population by age and sex for January 2010 derived from the U.S. Census Bureau's Population Estimate Program adjusted by estimates of group quarters from the decennial 2010 U.S. Census. The components of population change are projected separately for each 5-year age cohort based on past trends. For each 5-year time period, 2010 to 2045, the population is advanced 5 years of age using the age-specific survival rates (2010 national rates) and migration rates averaged across 2000 to 2007 purposely excluding the Great Recession and the years following. We found that in the years of the recession, there was a big drop in domestic out migration due to the difficulty in selling a home, and the lack of job prospects elsewhere. That trend seems to have turned around and domestic out migration in the past few years is returning to pre-great recession levels. A new birth cohort is added to the population by applying averaged, age-specific general fertility rates to the female population. We are also finding that the birth rate is picking up from the great recession levels, and we expect that the millennials' delayed household formation and birth rates will return to more historic levels. Projected group quarters for the 5-year time periods is added to the modeled household population to derive the total population forecast for Montgomery County. Population in group quarters includes those living in nursing homes, dormitories, jails, and group homes.

### Households

The household forecast for Round 9.0 anticipates a gain of 114,000 households from 2010 to 2045, 32 percent increase across 35 years. As seen in the table below (Table 4), this round's household forecast in 2040 is not noticeably different from the previous Round 8.4.

Table 4. Comparison of Montgomery County Household Forecasts, Round 9.0 and 8.4

	2010*	2015	2020	Year					2010 to 2040	
				2025	2030	2035	2040	2045	Change	% Increase
Households Round 9.0	357,086	380,200	396,800	414,300	431,300	447,000	459,700	470,700	102,614	28.7%
Round 8.4	361,000	377,500	397,000	414,900	434,800	449,900	460,200	-	99,200	27.5%
Difference between Rounds 9.0 and 8.4	(3,914)	2,700	(200)	(600)	(3,500)	(2,900)	(500)	-	3,414	-
Percent Change between Household Forecasts	-1.1%	0.7%	-0.1%	-0.1%	-0.8%	-0.6%	-0.1%	-	3.4%	-

\* 2010 population and household estimates are for April. The 2015 to 2045 forecasts reflect January of the year.

Source: Montgomery County Planning Department, M-NCPPC.


The household projections for Round 9.0 is derived using a headship rate method which assumes that the number of people who head a household is equal to the number of households. The data for the headship rate method utilizes county level householder age estimates from the decennial 2000 and 2010 U.S. Census and the 2005 to 2014 American Community Survey, 1-year estimates. For each 10-year householder age cohort for the adult population age 15 and older, headship rates

are calculated by dividing the number of householders in the age cohort by the household population in the same cohort. The average headship rate for period 2000 to 2014 is applied to the forecasted household population in respective age cohorts to estimate the number of households for each age cohort for the forecast year. The forecasted households are summed across the adult age cohorts calculating the total households for the forecasted year. The household projection holds the headship rate by age cohort constant across the forecast period. The change in the number of households is attributed to population growth and changes in the age structure of the population.

We will be supplying you with the Transportation Analysis Zone (TAZ) level population, household, and employment figures by mid-February 2016. Please note that our control totals are subject to change based on the TAZ allocation, but we will keep you updated on any such changes.

If you have questions on these numbers, inputs or methods, do not hesitate to contact Roberto Ruiz at (301) 495-5618.

Sincerely,

  
Gwen Wright,  
Planning Director

Cc: Rose Krasnow, Deputy Planning Director  
Elizabeth Davison, Acting Chief, Research and Special Projects Division  
Roberto Ruiz, Research Manager  
Pamela Zorich, Research Coordinator



October 28, 2015

Paul DesJardin, Chief of Housing and Planning  
 Metropolitan Washington Council of Governments (MWCOG)  
 777 North Capitol Street, Suite 300  
 Washington, DC 20002

Re: Round 9.0 Cooperative Forecast Jurisdictional Totals for the City of Gaithersburg

Dear Mr. DesJardin:

Please accept this letter as a formal transmittal of the jurisdictional total for the City of Gaithersburg, Maryland to be incorporated into the MWCOG Round 9.0 Cooperative Forecasts. These numbers are the best estimate of future development within the City limits, and have been developed in coordination with the Montgomery County Department of Planning (M-NCPPC). The forecasts for the City portion of each traffic analysis zone (TAZ) will be provided to M-NCPPC, who will then submit the final forecast totals for each TAZ to MWCOG. Please note that population, households, and jobs have been updated for each 5-year period. Two annexations that resulted in a change to the City boundary are reflected in the 2015 and later forecasts, but three pending annexation applications are not included in these totals. The reduction in jobs from the Round 8.2 forecast reflects recent economic trends and analysis of the Census LEHD and InfoUSA employment data provided by MWCOG.

Year	Round 9.0 Population	Percent Change	Round 9.0 Households	Percent Change	Round 9.0 Employment	Percent Change
2010	59,933		22,000		42,217	
5-year change	7,166	11.96%	2,651	12.05%	4,212	9.98%
2015	67,099		24,651		46,429	
5-year change	4,455	6.64%	1,734	7.03%	1,655	3.56%
2020	71,554		26,385		48,084	
5-year change	4,001	5.59%	1,541	5.84%	1,801	3.75%
2025	75,555		27,926		49,885	
5-year change	3,420	4.53%	1,554	5.56%	3,491	7.00%
2030	78,975		29,480		53,376	
5-year change	3,445	4.36%	1,550	5.26%	4,458	8.35%
2035	82,420		31,030		57,834	
5-year change	3,396	4.12%	1,464	4.72%	4,412	7.63%
2040	85,816		32,494		62,246	
5-year change	3,003	3.50%	1,218	3.75%	4,357	7.00%
2045	88,819		33,712		66,603	
<b>Change 2010-2045</b>	<b>28,886</b>	<b>48.20%</b>	<b>11,712</b>	<b>53.24%</b>	<b>24,386</b>	<b>57.76%</b>

If you have any questions regarding the forecasts, please do not hesitate to call me at (301)-258-6330.

Sincerely,

John B. Schlichting  
 Director of Planning and Code Administration

cc: Greg Goodwin  
 Kirk Eby

City of Gaithersburg • 31 South Summit Avenue, Gaithersburg, Maryland 20877-2098  
 301-258-6300 • FAX 301-948-6149 • TTY 301-258-6430 • cityhall@gaitersburgmd.gov • www.gaitersburgmd.gov

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111 Maryland Avenue | Rockville, Maryland 20850-2364 | 240-314-5000  
[www.rockvillemd.gov](http://www.rockvillemd.gov)

October 29, 2015

Paul DesJardin, Chief of Housing and Planning  
 Department of Human Services, Planning and Public Safety  
 Metropolitan Washington Council of Governments (MWCOCG)  
 777 North Capitol Street, Suite 300  
 Washington, DC 20002

Re: Round 9 Cooperative Forecast Jurisdictional Totals for the City of Rockville

Dear Mr. DesJardin:

This letter serves as a formal transmittal of the jurisdictional totals for the City of Rockville, Maryland to be incorporated into the Council of Governments Round 9 Cooperative Forecasts. These numbers are the best estimate of future development within the City boundary, and have been developed in coordination with the Montgomery County Department of Park and Planning.

The proposed Round 9 City of Rockville's forecast of population, households and employment are as follows:

Year	Round 9 Population	Percent Change	Round 9 Households	Percent Change	Round 9 Employment	Percent Change
2010	61,209		25,199		74,550	
<b>5-year Change</b>	5,086	8.31%	1,219	4.84%	-1,996	-2.68%
2015	66,295		26,880		72,554	
<b>5-year Change</b>	5,223	7.88%	2,545	9.47%	1,122	1.55%
2020	71,518		29,420		73,676	
<b>5-year Change</b>	5,353	7.48%	1,412	4.80%	2,417	3.28%
2025	76,871		31,894		76,092	
<b>5-year Change</b>	3,486	4.53%	1,438	4.51%	2,392	3.14%
2030	80,357		33,558		78,484	
<b>5-year Change</b>	3,214	4.00%	1,743	5.19%	5,747	7.32%
2035	83,570		35,092		84,231	
<b>5-year Change</b>	3,256	3.90%	1,650	4.70%	6,443	7.65%
2040	86,826		36,455		90,674	
<b>5-year Change</b>	3,066	3.53%	1,405	3.85%	5,132	5.66%
2045	89,893		37,860		95,806	
<b>35-Year Change</b>	<b>28,684</b>	<b>47%</b>	<b>12,661</b>	<b>50%</b>	<b>21,256</b>	<b>29%</b>

Note that the overall City figures shown in the letter are preliminary and may change as the final traffic analysis zone totals are allocated.

Rockville's commercial base 2010 is the same as Round 8.2. The City is showing a decrease in the number of jobs in the 5-year period from 2010 to 2015 that reflects the current economic conditions and trends. The 2015 jobs number was developed by reviewing data sources available in-house, such as the building permit data and CoStar, and the 2015 InfoUSA data as provided by COG.

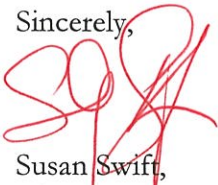
Rockville's residential base is adjusted to be consistent with that of the decennial census. Per the Census, the City of Rockville's 2010 population was 61,209 and total number of housing units in the city was 25,199. Census also produces population estimates annually and Rockville's estimated population for July 2014 was 65,937. We have adjusted our numbers accordingly in our 2015 estimates to incorporate the growth by new development and to be consistent with the Census estimates.

In Rockville, future office development is expected to occur at a slower pace because several projects in predominantly office areas are being converted to residential development, such as those in King Farm and Tower Oaks. These areas have not been able to attract office development for a number of years, and there appears to be a rising demand for single-family residential development at these locations, which is a new trend. Therefore our current forecasts show new single family development, which was not shown in the past Rounds, and a decrease in office employment. In the past, almost all of our new residential construction was in the multifamily category.

For future years, the vacancy rate of 10% is assumed for office, which is consistent with what is seen in the Rockville submarket. For projections, we are at present only applying vacancy rates to office space, and not to retail, industrial or other institutional spaces in conformance with the practice of the general COG region.

If you have any questions regarding the forecasts, please do not hesitate to call me at (240)-314-8200, or Manisha Tewari at 240-314-8213.

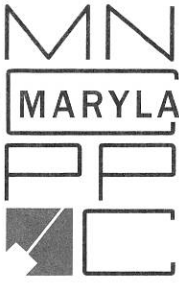
Sincerely,



Susan Swift,  
Director of Community Planning and Development Services

Cc: Manisha Tewari, Planner III  
David Levy, Chief, Long Range Planning and Redevelopment  
Elizabeth Davison, Acting Chief, Research and Special Projects Division  
Robert Ruiz, Research Manager, M-NCPPC

**THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION**



Office of the Planning Director  
Prince George's County Planning Department

14741 Governor Oden Bowie Drive  
Upper Marlboro, Maryland 20772  
TTY: (301) 952-4366  
[www.mncppc.org/pgco](http://www.mncppc.org/pgco)  
301-952-3595

October 6, 2015

Mr. Paul DesJardin, Chief of Housing and Planning  
Department of Human Services, Planning, and Public Safety  
Metropolitan Washington Council of Governments  
777 North Capitol Street, N.E., Suite 3000  
Washington, D.C. 20002-4239

**RE: Round 9.0 Cooperative Forecast  
Jurisdiction Control Totals for  
Prince George's County**

Dear Mr. DesJardin:

This letter transmits Prince George's County's Round 9.0 Cooperative Forecast jurisdiction control totals. As you know, the County did not participate in the Round 8.4 Forecast and the County refined the distribution of population, households, dwelling units, and employment at the COG TAZ level for Round 8.3.

As in the Round 8.3 Forecast, the 2010 Decennial Census figures for households and population served as the base for Round 9.0. Dwelling units are derived from the County's tax assessor database and the department's inventory of multi-family dwelling units. Employment data relies on a combination of the InfoGroup data and current ES202 data provided by the State of Maryland. The COG TAZ level forecast will be calculated based on a household population to dwelling unit ratio method controlled by current and expected average household sizes at the small area level geography. The resulting projections will show less growth than suggested in Round 8.3.

Round 9.0 population and household projections are based on a household population to dwelling unit ratio that takes into account the increase in average household size experienced in the County between the 2000 and 2010 Censuses. Average household size is projected to rise gradually in the near-term and decline in the long-term. The projection for dwelling units is based on historic completions and new home sales from 2005-2015. These figures were adjusted in the near-term to account for historically high vacancy rates, reductions in completions and new home sales that the County has experienced since 2010.

The employment base for the County was developed according to the approach suggested by the Metropolitan Washington Council of Governments (MWCOG) memorandum dated October 1, 2015. The County's estimate for 2015 varies slightly from the MWCOG result since it is based on ES202 data provided by the Maryland Department of Labor, Licensing and Regulation (DLLR). The County

strongly recommends that MWCOC note the suggested change in how self-employed persons are estimated, specifically the shift from a population based ratio to Quarterly Census of Employment and Wages (QCEW) employee based ratio. The County employment projections are based on historical trends from 2005 to 2013 in conjunction with the Maryland Department of Planning's projected employment growth rates from 2015 to 2040.

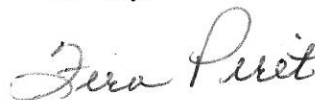
The following table presents the County's Round 9.0 control totals for population, employment, dwelling units, and households.

**Table 1**  
**Round 9.0 Cooperative Forecast for Prince George's County**

Year	Population	Employment	Dwelling Units	Households
2010	863,420	333,942	328,182	304,042
2015	899,712	338,565	343,621	314,877
2020	918,426	349,048	349,750	328,002
2025	933,305	366,326	356,509	337,599
2030	948,237	375,741	366,256	349,228
2035	963,124	385,510	374,385	357,017
2040	977,667	393,336	381,478	363,757
2045	991,158	402,147	386,478	370,521

If you have additional questions, please contact me or Ms. Jacqueline Philson in our Countywide Planning Division at 301-952-3627.

Sincerely,



Fern V. Piret  
Planning Director

- c: Derick P. Berlage, Chief, Countywide Planning Division
- Jacqueline Philson, Master Planner, Countywide Planning Division
- Ted Kowaluk, Senior Planner, Special Projects Section, Countywide Planning Division
- David S. Iannucci, Assistant Deputy Chief Administrative Officer, Prince George's County Office of the County Executive



# County of Fairfax, Virginia

To protect and enrich the quality of life for the people, neighborhoods and diverse communities of Fairfax County

October 8, 2015

Paul DesJardin, Director  
Department of Community Planning and Services  
Metropolitan Washington Council of Governments  
777 North Capitol Street, N.E., Suite 300  
Washington, DC 20002

Dear Mr. DesJardin:

The Fairfax County Department of Planning and Zoning submits the following employment control totals for Round 9.0, based on an analysis of historic, economic trends in the County related to jobs in the Transportation Planning Board region and County population. Overall, the County's total employment is expected to grow through 2045, albeit not as fast as previously estimated.

The primary source for historic trends is the Bureau of Labor Statistics' Quarterly Census of Employment and Wages from 1990-2014. The Council of Government's (COG) most recent, regional forecast from July 2015 was utilized to forecast employment for supersectors that are expected to follow regional growth patterns. Jobs in supersectors that have tended to change as the County's population changes have been estimated using a linear regression model. Staff incorporated additional jobs per the Council's recommendations detailed in the memorandum "Suggested Approach to Preparing Baseline Employment Estimates", dated October 1, 2015—to account for jobs captured in the Current Employment Statistics, self-employment, unpaid family workers, and military. The military control total is based on approximately twenty percent of the total employment planned for Fort Belvoir.

Employment Control Totals								
	2010	2015	2020	2025	2030	2035	2040	2045
Round 9.0	625,764	654,100	702,600	750,000	791,200	834,500	874,400	909,700
Round 8.3	625,764	661,038	722,083	775,784	825,456	857,444	886,765	n/a
Difference	0	-6,938	-19,483	-25,784	-34,256	-22,944	-12,365	-

These control totals will guide staff in allocating jobs for 2015 and later into over five hundred traffic analysis zones (TAZs). Data purchased by COG from InfoGroup and the Virginia Employment Commission have been geocoded and will be utilized to establish a 2015 estimate, even though 2010 remains the official base year for the regional forecast. Existing jobs data for



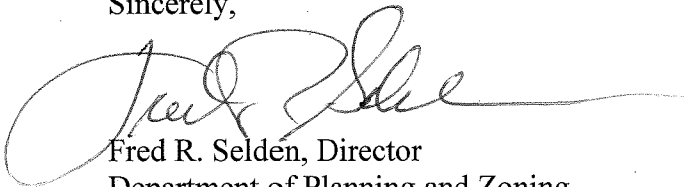
Fairfax County government and public schools, home occupation permits, daycares, and active business licenses have all been collected and will be analyzed to establish an employment estimate for 2015. Approved, unconstructed development applications from January 2009- March 2015 have been collected and organized in a geodatabase and will be added to the base year employment.

Since unconstructed, approved developments will likely only help estimate new jobs through 2030, staff will evaluate the Comprehensive Plan for development options and capacity to absorb additional growth. The growth will largely be allocated into the County's established development centers, supporting the regional activity center concept. The employment forecast by TAZ will be constrained by development limits recommended in the Comprehensive Plan. The employment sum of all TAZs will not exceed the 2045 control total; however, staff will have flexibility until the official submission in February to adjust the control totals herein from 2015-2040 to better-reflect a reasonable employment scenario.

The final employment forecast due in February will assume that transportation improvements planned and included in the adopted Constrained Long Range Plan (CLRP) will be implemented, including the extension of the Silver Line. The 2015 amendment to the CLRP includes *US 1 Bus Rapid Transit*. On October 21<sup>st</sup>, the TPB will vote to adopt the 2015 CLRP. Assuming that the amendment is approved, TAZs along the Route 1 corridor will be allocated higher employment growth than would otherwise be allocated.

If you have any questions, please feel free to contact Kristen Hushour at (703) 324-1380.

Sincerely,



Fred R. Selden, Director  
Department of Planning and Zoning



# Loudoun County, Virginia

www.loudoun.gov

## Department of Planning and Zoning

1 Harrison Street, S.E., 3<sup>rd</sup> Floor, P.O. Box 7000, Leesburg, VA 20177-7000  
703/777-0220 • Fax 703/777-0441

October 8, 2015

Paul DesJardin  
Director of Community Planning and Services  
Metropolitan Washington Council of Governments  
777 North Capitol Street, N.E., Suite 300  
Washington, D.C. 20002

### ***Re: Loudoun County's Round 9.0 Cooperative Forecast Control Totals***

Dear Mr. DesJardin:

This letter constitutes Loudoun County's transmittal of its county-wide control total forecasts of population, households, and employment for the Round 9.0 Cooperative Forecasts. These forecasts reflect revisions to the population, household, and employment numbers that were part of the Round 8.3 series. Loudoun did not participate in Round 8.4, thence Loudoun's Round 8.4 forecasts match Round 8.3. Loudoun County's Fiscal Impact Committee provided input and guidance for this latest round of forecasts. Following a series of meetings, the Fiscal Impact Committee voted on September 17, 2015 to approve the *2015 Fiscal Impact Committee Guidelines*, which includes the committee's recommendations on forecasts of population, households, and employment through 2045. The *2015 Fiscal Impact Committee Guidelines* were forwarded to the Loudoun County Board of Supervisors with a recommendation from staff to approve. The Board approved the guidelines document on October 7, 2015.

The household and population forecasts have been revised to account for recent development activity, re-zonings, by-right project subdivision and site plan activity, market conditions, and future land use/development constraints. The population and household forecasts have been updated to reflect three key elements: 1) growth coming on slightly slower in the near-term than previously anticipated, yet still at a fast pace, 2) rail arriving in early 2020, rather than 2018 or early 2019 as previously anticipated, and 3) the Waterside rezoning, which is by far the largest newly approved development since Loudoun's Round 8.3 Traffic Analysis Zone submission on March 7, 2014, with 2,295 housing units and 3,800,000 square feet of non-residential allowed.

Like the residential forecasts, the employment forecasts were revised to account for recent development, re-zonings, and current market conditions for nonresidential development. The employment forecasts have been updated to reflect three key elements: 1) rail arriving in early 2020, rather than 2018 or early 2019 as previously anticipated, 2) updated assumptions of square feet per employee for office and industrial, and 3) reduced expectations for new office development particularly in the near-term, but also through 2030, given the softness in the regional office market and trends towards less office space per worker. Based on research the County conducted, the gross square feet per employee factor for high density office was reduced from 294 to 235, low density was reduced from 315 to 251, flex/light industrial was increased from 465 to 600, and heavy industrial was increased from 546 to 700. The reduction forecasted for new office development is offset by the fact that there are fewer square feet per office worker, which results in fairly similar employment forecasts by 2040 compared to Round 8.3 and Round 8.4

The employment base year that laid the foundation for Loudoun's Round 9.0 control total forecasts was 2014. The employment data have been updated at this time based on analysis of Virginia Employment Commission second quarter 2014 ES-202 data, American Community Survey data through 2013 of self-employed in unincorporated businesses and unpaid family workers, and local data sources. During the

Round 9.0 Traffic Analysis Zone (TAZ) process this fall and winter, analysis of updated InfoUSA data, which the County has yet to receive from COG, may lead to slight adjustments to the 2014 base data. The forecasted net amount of growth from 2010 to 2015 may change slightly depending upon adjustments to Loudoun's 2014 base employment estimate. The forecasted net amount of employment growth for each five year period from 2015 to 2040 would remain unchanged, while the cumulative would change depending upon on the change to the base 2014 employment number.

**Round 9.0 Cooperative Forecast Control Totals  
 Loudoun County, Virginia**

	2010	2015	2020	2025	2030	2035	2040	2045
Population	312,300	363,500	412,500	448,000	466,600	481,100	489,200	494,200
Households	104,600	121,100	137,100	149,700	157,200	163,400	166,700	168,300
Employment	142,600	164,500	188,100	210,100	234,000	254,200	272,900	288,900

**Round 8.3 and 8.4 Cooperative Forecast  
 Loudoun County, Virginia**

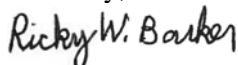
	2010	2015	2020	2025	2030	2035	2040	2045
Population	312,300	368,000	418,000	452,200	468,700	478,600	484,500	n/a
Households	104,600	122,600	139,500	151,600	158,100	162,200	164,300	n/a
Employment	145,100	163,900	197,300	224,200	248,800	264,200	278,200	n/a

**Difference in Forecasts, Round 9.0 versus Round 8.3/8.4  
 Loudoun County, Virginia**

	2010	2015	2020	2025	2030	2035	2040	2045
Population	0	-4,500	-5,500	-4,200	-2,100	2,500	4,700	n/a
Households	0	-1,500	-2,400	-1,900	-900	1,200	2,400	n/a
Employment	-2,500	600	-9,200	-14,100	-14,800	-10,000	-5,300	n/a

Thank you for the opportunity to submit these updated forecasts for the regional forecasting process. If you have any questions about the forecasts or the process used to develop them, please contact me or Jill Kaneff, Loudoun County's Demographer at (571) 258-3137.

Sincerely,



Ricky Barker, AICP  
 Director, Department of Planning and Zoning

- cc: *Greg Goodwin, Senior Regional Planner, Metropolitan Washington Council of Governments*  
*Scott K. York, Chairman At-Large, Loudoun County Board of Supervisors and Representative on the MWCOG Board of Directors*  
*Matt Letourneau, Supervisor, Dulles District, Loudoun County Board of Supervisors and Representative on the MWCOG Board of Directors*  
*Tim Hemstreet, County Administrator*  
*Joe Kroboth, Director, Department of Transportation and Capital Infrastructure*  
*Erin McLellan, Director, Department of Management and Budget*  
*Buddy Rizer, Director, Department of Economic Development*  
*Jill Kaneff, Demographer, Department of Planning and Zoning*



Melissa S. Peacor  
County Executive

## COUNTY OF PRINCE WILLIAM

OFFICE OF EXECUTIVE MANAGEMENT

1 County Complex Court, Prince William, Virginia 22192-9201  
(703) 792-6600 Metro 631-1703 FAX: (703) 792-7484

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Frank J. Principi

October 7, 2015

**TO:** Paul DesJardin  
Metropolitan Washington Council of Governments

**FROM:** Chris Price  
Director, Planning Office *CP*

Michelle Attreed  
Director, Finance Department *MA*

**RE:** COG Cooperative Forecasting Round 9.0

Enclosed please find Prince William County's submission of Round 9.0 jurisdiction control totals for population, households, and employment forecasts through 2045. TAZ-level forecasts will be forwarded to you via e-mail at a later date. These forecasts represent our staff's best estimate of how development will occur from 2015 to 2045.

Prince William County last participated in Round 8.4 in 2014 which decreased previous projections of employment, households and population reflecting the slower recovery from the recession. Round 9.0 updates 2015 with new numbers based on current estimates, extends the projection out to 2045, and incorporates the new Econometric Model. Employment figures include adjustments for self-employed and the Bureau of Labor Statistics' Current Employment Statistics program based on the recent MWCOG analysis and include new data and projections from the Marine Corps Base Quantico Master Plan. For households, the short-term forecast based on occupancy permits has been extended to 2020 and the forecast reflects changes in the build-out capacity due to changes in the Comprehensive Plan. The population projection includes new information on group quarters from MCB Quantico and the addition of new dormitories at the George Mason University campus.

### Attachment

CC: Melissa Peacor, County Executive  
Chris Martino, Deputy County Executive  
Susan Roltsch, Deputy County Executive  
Bill Vaughan, County Demographer

Allen Scarbrough, Treasury Manager  
Tom Blaser, Transportation Director  
David McGettigan, Long Range Planning

**Prince William County, Virginia**  
**Households, Population, and Employment Projections, 2010 to 2045**  
**Submission for COG Round 9.0**  
**Revised 10/6/15**

	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>2045</b>
Households	130.8	141.0	151.8	164.4	173.8	181.6	188.0	193.0
Population	402.0	431.8	465.5	497.5	522.1	542.7	559.7	573.7
Employment	122.3	144.6	165.0	184.4	204.6	226.3	250.6	272.1



DEPARTMENT OF PLANNING AND ZONING

301 King Street
Room 2100
Alexandria, VA 22314

Phone (703) 746-4666
Fax (703) 838-6393

www.alexandriava.gov

October 7, 2015

Paul DesJardin
Director of Community and Planning Services
Metropolitan Washington Council of Governments
777 North Capitol Street, N.E.
Washington, DC 20002

Dear Paul,

Below are the City of Alexandria's forecast control totals for population, households and employment for the Council of Governments' Round 9.0 Cooperative Forecast. Compared to our Round 8.4 submittal, the forecast reflects a slightly higher population and employment total for forecast years beginning in 2020. This increase is a consequence of the anticipated approval of the Eisenhower West Plan, changing policy in this area to encourage residential and mixed-use projects. Other development is assumed to be somewhat slower than assumed last round, including development in the Landmark and Beauregard planning areas. Development in Potomac Yard continues strong, and the new Potomac Yard Metro Station is expected to generate strong growth in both housing and employment in that area through 2030 and beyond.

Our employment baseline has dropped slightly in 2015 as a result of using COG's newly recommended guideline for estimating current employment. This lower employment is associated with somewhat higher than usual office vacancy in Alexandria. The TSA and National Science Foundation projects will keep office development strong over the next five years, and we have assumed that the office vacancy associated with the lower employment total will be normalized over the next 10 years.

Table with 9 columns (Year) and 10 rows (Households, Household Population, Group Quarters, Total Population, Employment, Retail, Office, Industrial, Other, Total Employment)

Sincerely yours,

Handwritten signature of Karl Moritz

Karl Moritz, Director
Department of Planning and Zoning



# CITY OF MANASSAS, VIRGINIA

## COMMUNITY DEVELOPMENT

9027 Center Street  
Manassas, VA 20110

Telephone: 703/257-8223  
Facsimile: 703/257-5117

MAYOR  
Harry J. Parrish II

CITY COUNCIL  
Jonathan L. Way, Vice Mayor  
Marc T. Aveni  
Sheryl L. Bass  
Ken D. Elston  
Ian T. Lovejoy  
Mark D. Wolfe

CITY MANAGER  
W. Patrick Pate

**Elizabeth S. Via-Gossman, AICP**  
Director, Community Development

October 8, 2015

Paul DesJardin  
Metropolitan Washington Council of Governments  
777 North Capitol Street, NE, Suite 300  
Washington, DC 20002

Dear Paul:

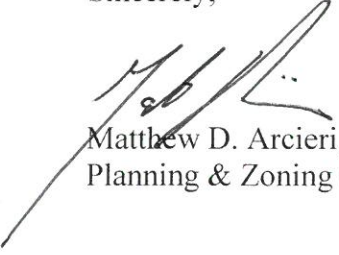
Thank you for this opportunity to provide tentative projections for the City of Manassas on households, population, and employment to be incorporated into the Council of Governments Round 9.0 Cooperative Forecasts. Please note that the City is working on updating these projections and plans to refine these estimates by the end of 2015.

### City of Manassas Round 9.0 Preliminary Forecasts

	2010	2015	2020	2025	2030	2035	2040	2045
Households	12,433	13,017	13,858	14,603	15,348	16,093	16,838	17,583
Population	37,821	39,132	40,622	42,112	43,603	45,093	46,583	48,073
Employment	23,633	25,719	26,261	27,930	29,598	31,267	32,936	34,604

If you have any questions regarding our estimates, please contact myself or Kelly Davis of this office at 703-257-8223.

Sincerely,

  
Matthew D. Arcieri, AICP  
Planning & Zoning Services Manager