



Metropolitan Washington
Council of Governments

ROUND 9.2 TRANSMITTAL LETTERS

AS OF SEPTEMBER 8, 2020



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

May 29, 2020

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 Mr. DesJardin:

This letter is to inform you that the Montgomery County Planning Department intends to participate in the Round 9.2 update to the cooperative forecast, including modification of the employment forecast, but without adjustments to the population or household forecast.

The forecasted countywide employment totals for all years will remain the same as those submitted for Round 9.1, but planning staff will make minor adjustments to the forecasted employment distribution for several Transportation Analysis Zones (TAZs). These adjustments will revise previously underestimated employment figures at the FDA campus facility in the White Oak area that were identified following the release of the Master Plan for the facility. In addition, employment figures in the White Flint and Rock Spring areas will be adjusted to reflect relocated FDA employees, the conversion of the former Marriot Headquarters site to a senior living community, and slower than initially anticipated redevelopment in those areas.

We believe that more substantial updates would be imprudent at this time, due to the present lack of data and extraordinary uncertainty about county employment and commercial development following the coronavirus pandemic. Our department looks forward to working with our partners at COG on the next major forecast round when we will provide fully revised employment, population, and household forecasts with the best available data.

Should your office have questions about county land use or development projects, please do not hesitate to reach out to our Research and Special Projects staff.

Sincerely,

Gwen L.M. Wright,
Planning Director

Cc: Tanya Stern, Deputy Director
Carrie McCarthy, Chief of Research and Special Projects
Corinne Blackford, Demographic and Employment Specialist



August 28, 2020

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

Dear Mr. DesJardin:

Arlington County's Department of Community Planning, Housing and Development (CPHD) continues to participate in the Metropolitan Washington Council of Government (MWCOG) cooperative forecasting process. The department's Research and Strategic Initiatives Group (RSIG) has updated the forecast land use and assumptions, resulting in a new 30-year forecast for Arlington. Concurrent with this letter, the new forecast is being submitted to MWCOG for participation in regional forecast Round 9.2.

Arlington's forecast Round 9.2 update reflects changes in the residential and commercial development outlook, as observed since the previous forecast produced as of July 2017. Round 9.2 accounts for Amazon's decision to locate a second headquarters in Arlington, and development projects and area plans approved by the County Board, including:

- 22 Site Plan (including Amendments), Use Permits and Form Based Code Projects
- Four Mile Run Valley Area Plan (*Nov. 2018*)
- Washington Boulevard and Kirkwood Road Special GLUP Study "Plus" and Concept Plan (*Nov. 2017*)

In addition, the following assumption and parameters were used to generate the updated forecast:

1. Areas forecasted for future growth must either be approved by the County Board through the site plan/special exception or form based code development entitlement processes, or designated for higher density development in accordance with the relevant sector plans and small area plans adopted as of July 1, 2020.
2. Residential unit occupancy and household size are based on 2010 Census rates, which vary based on planning area.
3. Vacancy rates for existing office space are normalized to each submarket's 20-year average by 2045.
4. Vacancy rates for forecasted office space are kept at a constant 10% throughout the forecast. This is to demonstrate that new office construction will be Class A space and will be occupied at different rates than existing office space.
5. The timing of forecasted residential and office development is informed by property ownership patterns, development activity, perceived market trends, and plan assumptions. This timing is then further calibrated using historic countywide and submarket residential and office absorption rates.

RSIG monitors and reports development activity on a quarterly basis. Between 2010 and January 1, 2020, almost 11,900 net residential units were added to Arlington's housing stock. When added to the 2010 Census base of 105,404 units, this results in a 2020 residential base of 117,300 units. Residential occupancy rates and average household size factors are applied to the net change in units to derive a 2020 base of 109,245 households and 231,240 persons. All forecast residential development was added to this 2020 base of units, households, and population to produce the updated forecast.

On November 13, 2018, Amazon announced that it would be establishing an additional headquarters in Arlington, creating up 25,000 jobs by 2030 and 12,000 additional jobs by 2035. These jobs are planned to occupy office space in Pentagon City and Crystal City.

Arlington's forecast Round 9.2 totals can be found in Attachment #1. Between 2015 and 2045, households and population are forecast to grow by 37% and 36.7%, respectively. This overall growth is consistent with the previous forecast Round 9.1. Arlington's employment is forecast to grow by 39% between 2015 and 2045, adding over 81,000 jobs during this 30-year period.

If you have any questions, please contact Elizabeth Hardy at ehardy@arlingtonva.us or (703) 228-3525.

Sincerely,



Anthony Fusarelli, Jr., AICP
Assistant Director
Department of Community Planning, Housing and Development

CC:

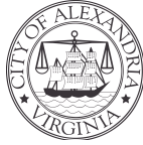
Robert J. Duffy, FAICP, Community Planning, Housing and Development, Planning Director
Claude Williamson, AICP, Community Planning, Housing and Development, Director
Samia Byrd, Deputy County Manager
Mark Schwartz, County Manager

Arlington Forecast Round 9.2 Totals**Units, Households and Population:**

	2015	2020	2025	2030	2035	2040	2045	2015-2045	
Units	110,578	117,306	126,751	133,318	139,672	146,263	152,457	41,879	37.9%
Households	103,216	109,245	117,855	123,837	129,675	135,788	141,401	38,185	37.0%
Household Population	215,909	227,957	245,935	258,346	270,579	283,934	296,243	80,334	37.2%
Total Population	219,092	231,240	249,218	261,629	273,862	287,217	299,526	80,434	36.7%

Employment:

	2015	2020	2025	2030	2035	2040	2045	2015-2045	
Office	135,956	151,302	159,005	175,809	197,276	203,797	207,445	71,489	52.6%
Retail	32,222	33,073	34,146	34,913	34,582	35,203	35,049	2,827	8.8%
Other	28,445	31,509	33,206	33,075	33,340	33,238	32,968	4,523	15.9%
Self Employed	4,576	5,426	5,720	6,200	6,820	7,010	7,101	2,525	55.2%
Industrial	7,944	8,040	8,036	8,125	8,128	8,219	8,238	294	3.7%
Total Employment	209,143	229,350	240,113	258,122	280,146	287,467	290,801	81,658	39.0%



DEPARTMENT OF PLANNING AND ZONING

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September 5, 2020

Mr. 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 please find the City of Alexandria's forecast control totals through 2045 for the Council of Governments (COG) Round 9.2 Cooperative Forecast. Alexandria's Round 9.2 control totals reflect updates that take into account new development, small area plans and major plan amendments that have been approved since Round 9.0. While minor adjustments were made to forecasted development throughout the City, the majority of adjustments were focused on the following activity centers to reflect new land use, square footage and phasing:

- North Potomac Yard
- Oakville Triangle
- Eisenhower East
- Landmark Mall

Each of these areas is located in the City's growth crescent, which encompasses Alexandria's Metrorail Stations, including the future Potomac Yard Metrorail Station (scheduled to open in 2022), and existing and planned high-capacity transitways. These amenity-rich Metro-proximate locations are currently outperforming other locations in attracting employers and residential uses and are expected to continue to do so through the forecast period. Virginia Tech's planned Innovation Campus in Potomac Yard is expected to bring 3 million square feet of institutional use by 2025 resulting in a sharp increase in employment growth in North Potomac Yard over the next 5-15 years, and generating significant associated residential and commercial development. On the west end of the city, the redevelopment of Landmark Mall is a large contributor of the city's new retail with 520,000 square feet expected by 2035. The City expects the peak of Landmark redevelopment in 2030-2035.

The recently updated Eisenhower East Small Area Plan both allows for more than six million square feet of additional development beyond the 2013 Plan, and enables the conversion of previously approved office uses to residential uses, in line with market demand and regional goals to increase housing. The City anticipates 2.2 million square feet of residential development in Eisenhower East by 2030. While the COVID-19 pandemic and economic impacts to the commercial and residential building industries may impact short term growth, potential long terms impacts have not been reflected in this forecast.

The City's forecast is based on current development and development envisioned in Small Area Plans. Household and population estimates were calculated using the most recent American Community Survey estimates for residential vacancy and average household size. The employment estimate was calculated based on COG provided and staff updated employment generation rates. Round 9.2 Forecast control totals are provided in the table below.

City of Alexandria 9.2 Forecast Control Totals

	2015	2020	2025	2030	2035	2040	2045
Households	71,191	75,665	85,294	94,127	107,397	116,764	126,971
Population	147,646	159,169	181,315	201,632	232,152	253,697	277,172
Employment	106,265	110,040	119,812	121,854	129,111	141,402	151,682

Please contact me if I can provide you with any additional information.

Sincerely,



Karl W. Moritz
Director



County of Fairfax, Virginia

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

September 8, 2020

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 Department of Planning and Development submits the following control totals for the Round 9.2 employment for 2020-2045. These totals are based on an analysis of historic trends, pipeline development, and development potential outlined in the Comprehensive Plan.

Please note: This letter supersedes the previous letter submitted.

	Employment		
	Round 9.1	Round 9.2	Difference
2015	654,100	654,100	0
2020	701,651	701,020	-631
2025	745,446	747,890	2,444
2030	787,246	791,189	3,943
2035	820,358	826,331	5,973
2040	857,728	864,547	6,819
2045	889,863	890,863	1,000

Specifically, changes to Round 9.2 include 1) the removal of employees from two, existing schools now located in the City of Falls Church for TAZ 1925, and 2) a comprehensive evaluation of approved rezoning activity in the Reston transit station areas along the Silver Line metro rail line. Attached to this transmittal letter is a spreadsheet with the TAZs that have changed with respect to Round 9.1.



PLANNING & DEVELOPMENT

Department of Planning and Development

Planning Division

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DesJardin
September 8, 2020
Page 2

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

Sincerely,

Na Yu, Planner II
Planning Division
Department of Planning and Development



CITY OF FALLS CHURCH

June 9, 2020

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

RE: City of Falls Church Participation in COG Cooperative Forecast Round – 9.2.

Dear Mr. DesJardin,

The City of Falls Church continues to participate in the Metropolitan Washington Council of Governments (MWCOG) cooperative forecasting process. The City has recently updated its population and employment projections through 2045. The City's forecast update for Round 9.2, reflects changes in net new development in the City, assumptions about trends in vacancy rates, commercial space per employee, and a new analysis of changing average household sizes.

This new forecast data is formally included in the 2019 update of the Demographics Chapter of the City's Comprehensive Plan, *titled People, Housing, and Job*, and is being submitted to MWCOG for participation in regional forecast Round 9.2. Population and employment totals at the Transportation Analysis Zone (TAZ) level are attached.

The City of Falls Church looks forward to working with MWCOG on this update to the regional forecast. If you have any questions, please contact Shaina Schaffer at (571.419.7268 or sschaffer@fallschurchva.gov).

Sincerely,

Paul Stoddard, AICP
Director of Planning



County of Loudoun, Virginia
Department of Finance and Budget
PO Box 7000
Leesburg, Virginia 20177-7000
Ph. 703.777.0500 *Fax. 703.777.0567

September 4, 2020

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 9.2 Cooperative Forecast Control Totals – Revised

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 9.2 Cooperative Forecasts. These forecasts reflect revisions to the population, household, and employment numbers that were part of the Round 9.1 series.

These revisions have been undertaken by Loudoun County staff, including input from the Department of Planning and Zoning and the Department of Economic Development. In October and November, Loudoun County's Board-appointed Fiscal Impact Committee will review the assumptions used to develop these forecasts, as part of its review of the draft *2020 Fiscal Impact Committee Guidelines*. It is possible that forecasts could change based on this review.

Changes included in the Round 9.2 update are comprehensive. Population and household forecasts have increased based on the updated land uses in the *Loudoun County 2019 Comprehensive Plan (2019 Plan)*, along with adjustments to household sizes and near-term vacancy rates. Based on evolving demand for different uses, forecasts for office and retail uses have decreased, while the County's underlying forecast for data center development (one component of the industrial category, albeit one that produces little employment) increased. In the near-term, development forecasts have been informed by recent permitting trends and consideration of the potential impacts of the COVID-19 pandemic.

As with previous rounds, the impact of opening Loudoun County's Silver Line stations, and the land use patterns planned in the vicinity of these stations, have been incorporated into the forecasts. One change in the land use pattern under the *2019 Plan* is the introduction of new Urban Policy Areas surrounding and between the Ashburn and Loudoun Gateway stations, as well as in the portion of Loudoun County near Fairfax County's Innovation Center station.

Round 9.2 Control Totals and Comparison to Round 9.1

The Round 9.2 countywide control totals for Loudoun are presented in the first table below. The second tables shows the difference between the Round 9.2 control totals and the Round 9.1 final totals. For Round 9.2, 2015 base year values were not changed.

**Round 9.2 Cooperative Forecast Control Totals
 Loudoun County, Virginia**

	2015	2020	2025	2030	2035	2040	2045
Population	368,700	423,000	467,600	510,100	528,700	542,200	551,500
Households	121,100	137,600	151,700	165,500	172,200	177,200	180,800
Employment	167,100	191,100	205,300	224,800	240,300	252,800	261,200

**Difference in Forecasts: Round 9.2 minus Round 9.1
 Loudoun County, Virginia**

	2015	2020	2025	2030	2035	2040	2045
Population	0	(900)	8,100	29,900	34,400	39,800	44,100
Households	0	(300)	1,600	7,500	8,300	10,300	12,100
Employment	0	(4,100)	(14,100)	(18,600)	(21,900)	(25,000)	(29,900)

Additional information on the trends and assumptions influencing these forecasts is provided in an attachment.

Thank you for the opportunity to participate in the Round 9.2 regional forecasting process. If you have any questions about the forecasts or the process used to develop them, please contact Megan Bourke, Assistant Director, at (703) 777-0178 or Beth Hilkemeyer, Demographic and Economic Analyst, at (703) 737-8756.

Sincerely,



Janet Romanchyk
 Acting Director
 Department of Finance and Budget

Attachment: Loudoun County COG 9.2 Control Total Trends and Assumptions

- Cc: Greg Goodwin, Senior Regional Planner, Metropolitan Washington Council of Governments
 Phyllis J. Randall, Chair At-Large, Loudoun County Board of Supervisors and Representative on the MWCOG Board of Directors
 Juli Briskman, Supervisor, Algonkian District, Loudoun County Board of Supervisors and Representative on the MWCOG Board of Directors
 Mike Turner, Supervisor, Ashburn District, Loudoun County Board of Supervisors and Ex-Officio Chair of the Fiscal Impact Committee
 Tim Hemstreet, County Administrator
 Joe Kroboth, Director, Department of Transportation and Capital Infrastructure
 Alaina Ray, Director, Department of Planning and Zoning
 Buddy Rizer, Director, Department of Economic Development
 Megan Bourke, Assistant Director, Department of Finance and Budget
 Beth Hilkemeyer, Demographic and Economic Analyst, Department of Finance and Budget

Attachment: Loudoun County COG 9.2 Control Total Trends and Assumptions

Population and Households

- Recent growth trends, 2016-20: Overall, growth from 2016-20 was very similar to the 2011-15 period, but with somewhat more multi-family and somewhat less single-family attached development.
- Factors influencing growth, 2021-30: With the adoption of the *2019 Plan*, the potential supply of housing has increased substantially through much of the County, leading to increases in forecasts through 2030. (Housing supply was not increased in the County's Rural Policy Area.) Despite the opening of Silver Line stations, current economic conditions are expected to reduce development somewhat through 2025, as compared to the 2026-30 period.
- Factors influencing growth, 2031-45: The reduced supply of single-family housing is expected to reduce growth potential after 2030, with multi-family development continuing albeit at a somewhat slowing rate over time.
- Data sources:
 - For estimates 2016-20, Loudoun County used residential permitting data along with household sizes derived from analysis of U.S. Census Bureau sources. As was done beginning with Round 9.1, decennial census household sizes by census tracts were compared to trends in 5-year American Community Survey (ACS) values. For some tracts, household sizes were adjusted based on ACS trends.
 - Forecasts for 2021-45 are based on forecasts of residential units by type, along with factors (household sizes and vacancy rates) for each type. Household sizes have been revised based on trends in student generation rate and ACS data, and near-term vacancy rates have been reduced based on current tight housing market conditions.

Employment

- Recent growth trends, 2016-20: Growth from 2016-20 was similar to the 2011-15 period, with the exception of data center development, which increased five-fold.
- Factors influencing growth, 2021-30: Data center development is expected to continue to be strong. Office and Retail development is expected to be impacted in the near-term by COVID-19.
- Factors influencing growth, 2031-45: Data center development is expected to be much lower, with office development continuing. Retail and Other development, which were forecast tied to population growth, decrease as population growth decreases.
- Major contributors to the overall reduction in employment forecasted in Round 9.2, as compared to Round 9.1 include:
 - Office employment: Round 9.1 was submitted prior to analysis for the *2019 Plan*. As part of undertaking this revision to its comprehensive plan, Loudoun County examined the demand for different land uses. As a result, forecasted office development was decreased for the analysis supporting the *2019 Plan*. This updated office forecast was carried over into the

- forecast for Round 9.2. The forecast was then further decreased through the mid-2020s, to reflect current permitting levels and the potential impact of COVID-19.
- Industrial employment: The extremely strong demand for data center development is limiting available land for other industrial development. Loudoun County's underlying forecast for light industrial development has been reduced, as more of the land available for light industrial is expected to develop as data centers. With Round 9.2, Loudoun County also has increased its ratio of data center square feet per job, which reduces the number of jobs generated.
 - Retail employment: Growth in retail employment is forecast as linked to population growth. As part of the analysis for the *2019 Plan*, Loudoun County examined the impact of retail development occurring at a lower level than has occurred in the past. Given continued trends in the retail industry, this lower "sensitivity test" value has been used for Round 9.2. In addition, retail development is forecast to be lower through the mid-2020s, reflecting current demand and the potential impact of COVID-19.
 - Location of growth: concentrations of development are expected to largely be similar to those already identified as COG Activity Centers, although there may be some variation based on adoption of the *2019 Plan*.
 - Data sources:
 - 2016 retained the estimate previously developed for Round 9.1
 - To estimate 2017-2020 employment, Loudoun County used nonresidential permitting data along with revised factors (square feet per job, vacancy rates). Results were compared to Quarterly Census of Employment and Wages (QCEW) historical data to ensure the same relationship as in the past. (Loudoun County's forecasts include additional employment, such as the self-employed.)
 - Revised factors were also applied to growth from 2021 onwards. These factors were developed through examination of Virginia Employment Commission and CoStar data, along with consultation of several other sources.



**PRINCE WILLIAM
COUNTY**

The Board of County Supervisors

Hon. Ann B. Wheeler, Chair
Hon. Victor S. Angry, Vice Chair
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Hon. Kenny A. Boddye
Hon. Pete Candland
Hon. Margaret Angela Franklin
Hon. Jeanine M. Lawson
Hon. Yesli Vega

September 2, 2020

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

Dear Mr. Desjardin,

Prince William County would like to participate in Round 9.2 to update Round 9.1 with a new distribution based on recently adopted small area plans. The redistribution of projected growth among the Traffic Analysis Zones will not significantly impact the control totals provided in Round 9.1.

Should you have any questions, please do not hesitate to contact David McGettigan at (703)-792-7189 or dmcgettigan@pwcgov.org.

Sincerely,

Steve Donohoe, AICP
Acting Director
Planning Office

Rob Mancini
Digitally signed by Rob Mancini
Date: 2020.09.02
13:16:41 -04'00'

Robert Mancini
Chief Information Officer
Department of Information Technology

cc: Chris Martino, County Executive
Michelle Casciato, Deputy County Executive
Elijah Johnson, Deputy County Executive
Christina M. Winn, Executive Director Economic Development
Rick Canizales, Transportation Director
David McGettigan, Long Range Planning Manager
Angie Mills, GIS Division Chief
Brian Engelmann, County Demographer



Department of Community Development

August 28, 2020

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

Re: Round 9.2 Cooperative Forecasts

Dear Mr. DesJardin:

Thank you for the opportunity to provide projections for the City of Manassas on households, population, and employment to be incorporated into the Council of Governments Round 9.2 Cooperative Forecasts.

Round 9.2 Forecasts

	2015	2020	2025	2030	2035	2040	2045
Households	12,749	13,084	13,867	14,281	14,695	15,008	15,321
Population	41,457	42,603	45,252	46,699	48,146	49,242	50,338
Employment	25,719	26,491	27,986	29,375	29,991	30,608	31,225

Land Use/ Policy

The preliminary forecasts reflect the updated information from the Manassas 2040 Comprehensive Plan which was adopted in February 2020 and residential zoning approvals that have been approved and/or completed since the previous forecast submission (Round 9.0).

Employment

Recent and short-term employment significantly increased in the Godwin Technology corridor with the expansion of Micron located in PWC TAZ 2595A to increase employment by 1,100 employees by 2030. Long-term employment is expected to increase in Downtown and Sudley long-range planning areas (character areas) and has the potential to increase in the Mathis character area if redevelopment of the corridor occurs.

Households and Population

Short-term data reflects five recent residential zoning approvals (including apartments, condominiums, townhomes, and single family detached homes) while long term data reflects build-out analysis per character areas which was updated as part of the Manassas 2040 Comprehensive Plan.

If you have any questions regarding our estimates, please contact me at 703-257-8232.

Sincerely,

A handwritten signature in black ink, appearing to read "Matt Arcieri".

Matthew D. Arcieri, AICP
Director, Planning & Development

Cc: W. Patrick Pate, City Manager
Elizabeth S. Via Gossman, FAICP, Director Community Development
Chloe Delhomme, AICP, Senior Planner