



Metropolitan Washington  
**Council of Governments**

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## **ROUND 9.1 TRANSMITTAL LETTERS**

**AS OF JANUARY 3, 2018**



## FREDERICK COUNTY GOVERNMENT

### DIVISION OF PLANNING & PERMITTING

Department of Planning

Jan H. Gardner  
County Executive

Steven C. Horn, Division Director  
Jim Gugel, Director

November 30, 2017

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

Dear Mr. DesJardin:

This letter outlines Frederick County's submission of Round 9.1 control totals. Please note that our control total reflect adjustments made only our base year and the forecasts employment. Frederick County's Round 9.1 Cooperative Forecasting submission, therefore, reflects only the adjustments made to our Employment control totals resulting from two key findings:

- Review of our Round 9.0 base year employment appeared much lower than what our sources are currently showing. Round 9.0 employment reflect the administrative records by Maryland Department of Labor, Licensing, and Regulations (DLLR) "preliminary" records totals at the time of our estimation; we believe, therefore, that our Round 9.1 revision now reflects DLLR's recent quarterly adjustments to statewide and political subdivision employment totals. For the forecasts periods, we are maintaining our Round 9.0 growth rates incrementally.
- Further, MWCOG's July 17, 2017 memo outlined steps for local jurisdictions to consider in order to reflect BLS most recent employment adjustments for Maryland jurisdictions. This adjustment prompted staff to review and make necessary changes to our base year employment. We did this by following the memo's recommended adjustment factors for the Wage and Salary and the self-employment components. Our higher military count than MWCOG's estimates is based on information obtained from the military installations.

For these reasons, Frederick County's incremental totals between 2015 through 2045 are shown below:

Round 9.1 Control totals	2015	2020	2025	2030	2035	2040	2045
Frederick County	111827	117300	123175	128628	135340	141074	145525

If you need further clarification or have other questions, please feel free to contact me directly at (301) 600-1144.

Sincerely,

Jim Gugel  
Planning Director



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

November 3, 2017

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 9.1 Cooperative Forecast totals for at-place employment, population, and households, see the below table.

	2015	2020	2025	2030	2035	2040	2045	Change	Percent Change
Employment	519,700	543,500	572,500	604,500	627,300	653,900	678,700	159,000	30.6%
Households	374,800	391,100	405,600	422,300	438,100	450,900	461,900	87,100	23.2%
Population	1,015,300	1,052,000	1,087,300	1,128,800	1,167,700	1,197,100	1,223,300	208,000	20.5%

These forecast totals are the same as what was provided in Round 9.0. The 9.1 interim-forecast will differ in that it will accommodate recently approved sector plans not included in the last forecast round and redistribute growth as appropriate. Thus, the Round 9.1 will include Transportation Analysis Zones (TAZs) allocations of employment, households, and population that differ from Round 9.0. Since the Round 9.0 forecast submission, three sector plans were approved by the Montgomery County Planning Board and County Council:

**Bethesda Downtown Sector Plan**

This sector plan was approved by the Montgomery County Council in May 2017 and aims to strengthen the area's centers of activity, including Bethesda Row, the Wisconsin Avenue Corridor, Woodmont Triangle and other districts over the next 20 years. Importantly, this plan allows for higher densities among select sites than the prior 1994 Bethesda Plan through the establishment of the Bethesda Overlay Zone. Provided certain community benefits, the plan allows up to 32.4 million square feet of gross floor area. Round 9.1 will incorporate assumptions stemming from this new sector plan approval.

**Greater Lyttonsville Sector Plan**

This sector plan for a subarea of Silver Spring was approved in February 2017 by the Montgomery County Council. This plan was catalyzed by the future construction of two Purple Line light rail stations and leverages this new

infrastructure by implementing higher densities around the future stations. At the same time, the sector plan preserves the existing residential and industrial areas. Round 9.1 will include assumptions from the rezoning around the future light rail stations.

Westbard Sector Plan

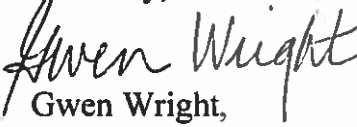
The Montgomery County Council approved this sector plan in May 2017. This plan allows for the potential for a floating zone to be requested by certain sites to accommodate future redevelopment. In addition, the plan called for the rezoning of the existing Westbard Shopping Center site to allow for additional density and uses, including housing. Round 9.1 will incorporate assumptions from the potential redevelopment that might be spurred by this sector plan.

In addition to the above sector plans, Round 9.1 will incorporate information from construction and development approvals that occurred after Round 9.0 was developed.

We will be supplying you with the TAZ-level population, household, and employment figures by early January 2018.

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

Sincerely,

  
Gwen Wright,  
Planning Director

Cc: Rose Krasnow, Deputy Planning Director  
Carrie McCarthy, Chief, Research and Special Projects Division  
Roberto Ruiz, Research Manager



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

December 13, 2017

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

Re: Round 9.1 Cooperative Forecast Jurisdictional Totals for the City of Rockville.

Dear Mr. DesJardin:

This letter outlines the City of Rockville's Round 9.1 Cooperative Forecast totals for at-place employment, population, and households, as seen in the table below:

	Population	Change	Households	Change	Employment	Percent Change
<b>2015</b>	66,295		26,448		76,943	
<b>5-year Change</b>	5,918	8.93%	2,545	9.62%	1,429	1.86%
<b>2020</b>	72,213		28,830		78,372	
<b>5-year Change</b>	6,029	8.35%	1,412	4.90%	2,001	2.55%
<b>2025</b>	78,242		31,108		80,372	
<b>5-year Change</b>	5,084	6.50%	1,438	4.62%	2,014	2.51%
<b>2030</b>	83,327		33,535		82,386	
<b>5-year Change</b>	3,402	4.08%	1,743	5.20%	4,196	5.09%
<b>2035</b>	86,729		35,159		86,582	
<b>5-year Change</b>	5,080	5.86%	1,650	4.69%	4,325	5.00%
<b>2040</b>	91,809		37,393		90,907	
<b>5-year Change</b>	4,264	4.64%	1,996	5.34%	5,496	6.05%
<b>2045</b>	96,073		39,389		96,403	
<b>35-Year Change</b>	<b>34,864</b>	<b>57%</b>	<b>14,190</b>	<b>56%</b>	<b>21,853</b>	<b>29%</b>

These projections are based on Rockville's estimate of future development within the City boundary, and were prepared in coordination with the Montgomery County Department of Park and Planning.

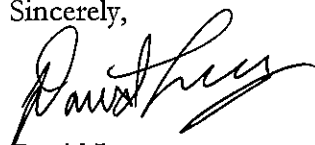
The population, household and employment numbers for the base year 2015 remain unchanged. Since Round 9 was adopted, Rockville has received applications for new developments and for conversions of previously approved (but not built) offices and existing office parks into residential or mixed-use development. The largest projects include:

- Shady Grove Road project, where a suburban office park with approximately 450,000 square feet of office space is proposed to be replaced with a mixed-use development consisting of an estimated 170,000 square feet of retail, 397,000 square feet of office/hotel (or senior housing), 1,600 multi-family units and 330 townhomes.
- Rockville Pike corridor project, where a developer purchased and consolidated 19 acres near the Twinbrook Metro Stations, and is proposing a mixed-use development, with an estimated 431,440 square feet of office space, 472,950 square feet of retail, 1,865 multi-family units and 9,000 square feet of theater.
- Significant conversions of approved office space into residential units proposed in the King Farm, Fallsgrove and Town Center areas, all of which are in the City's activity centers.

The above changes affect our short-term and long-term household, population and employment forecasts. The City has also been working on revisions to its Comprehensive Master Plan and the policies and recommendations as evolving for the plan may impact future land use, resulting in changes to forecasts in future rounds.

Thank you, as always, for working with us and coordinating the regional forecasting process. If you have any questions regarding the forecasts, please do not hesitate to call Manisha Tewari, at 240-314-8200, or me.

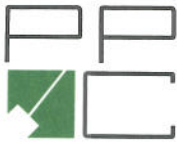
Sincerely,



David Levy  
Chief, Long Range Planning

Cc: Manisha Tewari, Principal Planner  
Andrew Gunning, Acting Director, Community Planning and Development Services  
Roberto Ruiz, Research and Technology, M-NCPPC

MN  
THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION



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

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Upper Marlboro, Maryland 20772  
[www.mncppc.org/pgco](http://www.mncppc.org/pgco)

301-952-3595

December 1, 2017

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 9.1 Cooperative Forecast  
for Prince George's County**

Dear Mr. DesJardin:

Thank you for extending an opportunity for Prince George's County to participate in the Round 9.1 Cooperative Forecast. Except for minor technical adjustments to the employment forecast at the Transportation Analysis Zones (TAZ) level, the County maintains the Round 9.0 forecast as their official forecast with no changes at the jurisdiction level and no significant changes at the TAZ level.

As in the Round 9.0, the Round 9.1 Cooperative Forecast for Prince George's County reflects the *Plan Prince George's 2035 Approved General Plan*, and the goal of concentrating growth in County designated centers which are expected to attract future growth, such as Prince George's Plaza Metro, New Carrollton Metro, and Largo Town Center Metro. The County continues to expect growth in major developments such as Konterra, Westphalia, National Harbor (including MGM National Harbor), College Park, and areas associated with the proposed Purple Line Light Rail, and the Inter-County Connector.

In September of this year, Greg Goodwin of your staff met with planning department staff to recommend that the County utilize Round 9.1 to correct data anomalies that Metropolitan Washington Council of Governments (COG) discovered in our employment forecasts at the TAZ level that inadvertently exhibited negative employment growth between 2015 and 2045 in 26 percent of the County's TAZs. Adjusting for rounding anomalies in the data, the percentage of TAZs experiencing negative growth has been reduced to 6 percent, which is in line with previous historical job growth trends.

This letter formally transmits the Prince George's County's Round 9.1 Cooperative Forecast by the COG TAZ inclusive of minor modifications to the employment forecast at the TAZ level. A copy of the data will be forwarded to you electronically.

**Round 9.1 Cooperative Forecast for Prince George's County**

<b>Year</b>	<b>Population</b>	<b>Employment</b>	<b>Dwelling Units</b>	<b>Households</b>
2010	863,420	333,942	328,182	304,042
2015	904,430	338,565	344,818	321,143
2020	923,144	349,048	350,947	334,268
2025	938,023	366,326	357,706	343,865
2030	952,955	375,741	367,453	355,494
2035	967,842	385,510	375,582	363,283
2040	982,385	393,336	382,675	370,023
2045	995,876	402,147	389,907	376,787

Questions regarding this information should be directed to Ms. Jacqueline Philson, Master Planner, Countywide Planning Division, at 301-952-3627.

Sincerely,



Andree Green Checkley  
Planning Director

c: Derick Berlage, Chief, Countywide Planning Division  
Jacqueline Philson, Master Planner, Countywide Planning Division  
Theodore Kowaluk, Planner Coordinator, Special Projects Section, Countywide Planning Division  
David S. Iannucci, Assistant Deputy Chief Administrative Officer, Office of the County Executive  
Gregory Goodwin, Metropolitan Washington Council of Governments



DEPARTMENT OF COMMUNITY PLANNING, HOUSING AND DEVELOPMENT  
Planning Division  
2100 Clarendon Boulevard, Suite 700, Arlington, VA 22201  
TEL 703.228.3525 FAX 703.228.3543 [www.arlingtonva.us](http://www.arlingtonva.us)

December 7, 2017

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 CPHD Planning Division continues to participate in the Metropolitan Washington Council of Government (MWCOG) cooperative forecasting process. The Planning Division has enhanced its forecasting process and methodology, resulting in a new 30-year forecast for Arlington. This new forecast has been submitted to MWCOG for participation in regional forecast Round 9.1.

Arlington's forecast Round 9.1 update reflects current housing and office market trends observed in the County and resulted in an increase in total population and a decrease in total jobs when compared to the previous forecast Round 9.0 submission.

The Planning Division closely monitors construction of housing units by tracking the issuance of building permits. Arlington has experienced an increase in completed housing units since 2015. Compared to Round 9.0, Forecast Round 9.1 reflects an increase of 2,540 units completed and anticipated to be completed by 2020. Since Arlington's population forecast is based on housing unit development, the increase in housing units led to a higher total population. Forecast Round 9.1, estimates Arlington's population will reach 301,200 people by 2045, an increase of an additional 11,670 people compared to the previous forecast submission.

The impact of BRAC, sequestration and regional office market conditions have increased Arlington's office vacancy rate to 20% since 2014. Due to these impacts, Arlington's job growth forecast for Round 9.1 is more conservative than Round 9.0. While the overall forecast of jobs is estimated to reach 269,000 by 2045, this total is a reduction of 10,400 jobs compared to the previous forecast submission.

The following assumptions were used to derive Arlington County's Round 9.1 Population and Employment Forecast.

- 1) Forecasted population and employment growth is consistent with the General Land Use Plan (GLUP). Areas forecasted for future growth must either be approved by the County Board through the site plan/special exception or form based code processes or designated for higher density development in accordance with the relevant sector plans and small area plans as of July 1, 2017.
- 2) Residential unit occupancy and household size are based on 2010 Census rates, which vary based on planning area.
- 3) Vacancy rates of existing office space are adjusted in the forecast to reflect the known impacts of BRAC, the sequestration, and other current economic conditions. Vacancy rates for existing office space are then 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, and plan assumptions. This timing is then further calibrated using historic countywide and submarket residential and office absorption rates.

The Planning Division continues to review and enhance its population and employment forecast model. Since the last forecast submission in 2015, Round 9.0, the Planning Division has refined its methodology to incorporate the most recent County Board adopted small area plan and known office lease expirations, as listed below:

- 1) Adopted by the Arlington County Board in July 2015, the Rosslyn Sector Plan provides a vision and guide for growth and development in the Rosslyn Coordinated Redevelopment District. Land use and development assumptions from this document were included in the forecast update.
- 2) Office vacancy rates were updated using CoStar second quarter 2017. Vacancy rates were adjusted for known lease expirations including the National Science Foundation (NSF) in Ballston and Transportation Security Administration (TSA) in Pentagon City.

Attached to this letter are Arlington County's totals for Round 9.1 Transportation Analysis Zone (TAZ) level data will be submitted by December 15, 2017 through email.

If you have any questions, please contact Elizabeth Hardy at (703) 228-3525.

Sincerely,

A handwritten signature in dark ink, appearing to read 'Robert J. Duffy', with a stylized, looping flourish extending from the end.

Robert J. Duffy, AICP, Planning Director  
Department of Community Planning, Housing and Development  
Planning Division

**Attachment:**

*Arlington County Forecast Round 9.1 Totals: Units, Households, Population and Employment*

**CC:**

Mark Schwartz, County Manager  
Samia Byrd - Assistant County Manager  
Claude Williamson, Community Planning, Housing and Development, Director  
Dennis Leach, Director of Transportation  
Kris Krider, Community Planning, Housing and Development, Planning Supervisor  
Aaron Shriber, Community Planning, Housing and Development, Planning Supervisor  
Jennifer Smith, Community Planning, Housing and Development, Planning Supervisor

# Forecast Round 9.1

Arlington County, VA

## Population

	2015	2020	2025	2030	2035	2040	2045
Housing Units	110,468	119,035	125,121	131,676	137,678	143,010	148,972
Households	103,761	112,046	117,866	123,857	129,768	135,599	141,843
Group Quarters	3,183	3,283	3,283	3,283	3,283	3,283	3,283
Household Population	217,730	235,012	246,179	258,509	271,280	284,280	297,884
<b>Total Population</b>	<b>220,913</b>	<b>238,295</b>	<b>249,462</b>	<b>261,792</b>	<b>274,563</b>	<b>287,563</b>	<b>301,167</b>

## Employment

	2015	2020	2025	2030	2035	2040	2045
Office	134,390	140,449	145,448	156,658	165,340	175,541	182,779
Retail	33,008	33,939	35,469	37,901	38,506	39,491	39,899
Other	29,852	29,788	29,513	29,910	30,680	31,130	31,221
Other-Self Employed	4,288	4,457	4,624	4,976	5,233	5,520	5,709
Industrial	8,126	8,241	8,485	8,934	9,145	9,295	9,459
<b>Total</b>	<b>209,664</b>	<b>216,874</b>	<b>223,539</b>	<b>238,379</b>	<b>248,904</b>	<b>260,977</b>	<b>269,067</b>

Source: Arlington County, CPHD, Planning Division, Center for Urban Design and Research, December 2017.



# County of Fairfax, Virginia

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

December 19, 2017

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 and the Economic, Demographic and Statistical Research (EDSR) branch of the Department of Management and Budget jointly submit the following control totals for the Round 9.1 employment, population, and household forecast for 2015-2045. These totals are based on an analysis of historic trends, pipeline development, and development potential outlined in the Comprehensive Plan.

Additionally, the Constrained Long Range Plan includes the project *US 1 Bus Rapid Transit (BRT)*. The control totals submitted herein reflect BRT-supportive land uses that have been drafted for the Embark Richmond Highway Plan Amendment ([2015-IV-MV1](#)). This Plan Amendment is scheduled to go to the Board of Supervisors in March 2018. Attached is a detailed letter that explains the importance of incorporating these draft land uses and quantities into Round 9.1 for a Federal Transit Authority (FTA) grant application. In general, this Plan Amendment would result in an increase in residential uses and a decrease of employment uses along the Richmond Highway corridor. This largely explains the decrease in jobs in the outer years at the control total level.

## Countywide Employment Forecast

The jobs forecast was adjusted in the Tysons and Reston areas as well as for the Navy Federal Credit Union and Transportation Security Administration headquarters in Vienna and Springfield, respectively. Pipeline development elsewhere also factored into this forecast. Overall, the County's total employment is expected to grow considerably through 2045, albeit not as fast as previously estimated in the outer years. A TAZ-level submission will be sent to you in January 2018.

	Employment		
	Round 9.0	Round 9.1	Difference
2015	654,100	654,100	0
2020	702,600	702,445	-155
2025	749,325	749,043	-282
2030	790,630	790,900	270
2035	827,830	824,012	-3,818
2040	864,530	861,389	-3,141
2045	898,130	893,530	-4,600

### Countywide Population & Household Forecast

The Fairfax County Department of Management and Budget's EDSR produces population, households and housing units estimates and forecasts on an annual basis. The Round 9.0 data reflect estimates and forecasts of households and population based on January 2015 data. The Round 9.1 data are from January 2017, however, it includes the Embark Richmond Highway Plan Amendment land use scenario as well. The corresponding TAZ-level data were submitted to you in November 2017.

As of January 2017, Fairfax County's population was 1,142,888 with 405,837 households and 415,690 housing units. The group quarters population was estimated to be 10,604.

Year	Population		Difference
	Round 9.0 (2015)	Round 9.1 (2017)	
2015	1,125,385	1,125,385	0
2020	1,162,547	1,161,779	-769
2025	1,213,202	1,210,810	-2,392
2030	1,264,717	1,271,204	6,487
2035	1,314,312	1,325,246	10,934
2040	1,362,480	1,373,706	11,226
2045	1,406,737	1,416,838	10,101


Year	Households		Difference
	Round 9.0 (2015)	Round 9.1 (2017)	
2015	403,934	403,934	0
2020	421,158	414,534	-6,624
2025	444,493	436,752	-7,742
2030	467,755	463,463	-4,292
2035	490,157	487,430	-2,727
2040	511,868	508,925	-2,943
2045	531,841	528,108	-3,733

The newer housing being built in Fairfax County continues to trend as multi-family units. Some of the newer, high-rise complexes have much higher vacancies due to high rents for these units. While the older, multi-family units have low vacancies and have remained stable regardless of unit type. The vacancies for owner-occupied units have decreased slightly from 2015 to 2017.

Based on our analysis, the average household size shows a slight increase over the last few years, which is reflected in the population estimates and forecasts. The 2017 average household size was 2.78 compared to 2.76 in 2015.

If you have any questions, please feel free to contact Kristen Hushour at (703) 324-1380 or Fatima Khaja at (703) 324-4516.

Sincerely,

  
Marianne Gardner, Director  
Planning Division  
Department of Planning and Zoning

Fatima Khaja, Manager  
Economic, Demographic & Statistical Research  
Department of Management and Budget



CC: Kristen Hushour, Planner III, Department of Planning and Zoning

Enclosure: Memorandum to Staff "Direction to Use Draft Embark Bus Rapid Transit Land Uses for the Richmond Highway Corridor Plan Amendment in the Metropolitan Washington Council of Government's Round 9.1 Forecast", September 14, 2017



# County of Fairfax, Virginia

## MEMORANDUM

**DATE:** September 14, 2017

**TO:** Anne Cahill, Manager  
Economic, Demographic & Statistical Research  
Department of Management & Budget

Marianne Gardner, Director  
Planning Division  
Department of Planning & Zoning

**FROM:** Tom Biesiadny, Director  
Department of Transportation

Fred Selden, Director  
Department of Planning and Zoning

**SUBJECT:** Direction to Use Draft Embark Bus Rapid Transit Land Uses for the Richmond Highway Corridor Plan Amendment in the Metropolitan Washington Council of Government's Round 9.1 Forecast

The Embark Richmond Highway Plan amendment proposes land use densities to support Bus Rapid Transit (BRT) in the short-term and Metrorail in the long-term for the Richmond Highway corridor. The County is simultaneously working to advance the BRT project for this area into an implementation stage to meet an established project timeline. We are requesting that the Department of Planning and Zoning (DPZ) and the Economic, Demographic and Statistical Research (EDSR) branch of the Department of Management and Budget develop the upcoming Metropolitan Washington Council of Governments (MWCOC) Round 9.1 forecast, based on the draft land uses proposed with this Plan amendment, dated for adoption in early 2018. This is critical to avoid project delays and ensure that the BRT project scores as favorably as possible in national competition for funding.

Staff from DPZ, EDRS and the Department of Transportation met to discuss the inclusion of draft Embark land use densities in the Round 9.1 forecast and the associated timeline. While the Embark Plan amendment is anticipated to be heard by the Board of Supervisors in March 2018, Round 9.1 forecasts are due, in January 2018 with an anticipated adoption by the MWCOC Board in Fall 2018. We understand that the standard practice is to develop the forecast based on the adopted Comprehensive Plan. We also recognize that substituting the draft Embark land use densities in the corridor to develop Round 9.1 would be a departure from this norm. Therefore, DPZ and EDRS staff requested that this proposal be presented to the Board of Supervisors to obtain their support.

Ms. Anne Cahill  
Ms. Marianne Gardner  
September 14, 2017  
Page 2 of 2

On July 18, 2017, DPZ and FCDOT staff briefed the Board Transportation Committee on the status of the Embark Plan Amendment and the rationale for using the draft Embark BRT land use densities to develop the Round 9.1 forecast. Staff explained that any differences between the adopted Plan and the Round 9.1 forecasts will be adjusted in a subsequent forecast round. With this understanding, the Transportation Committee consented to staff's proposal to base the Round 9.1 land use submission on the drafted Embark BRT land use densities. This memo has been developed to formally transmit the request to develop Round 9.1 land use forecasts accordingly and make any subsequent changes to Round 9.2 in the future, if necessary.

Please contact either Tom at 703-877-5663 or Fred at 703-324-1262, if you have any questions or need additional information. Thank you for your assistance with this important effort.

CC:

Meghan Van Dam, Branch Chief, Department of Planning and Zoning (DPZ)  
Jennifer Garcia, Planner III, DPZ  
Kristen Hushour, Planner III, DPZ  
Fatima Khaja, Economist and Statistical Analyst, Economic, Demographic & Statistical Research (EDSR), Department of Management & Budget (DMB)  
Eric Teitelman, Chief, Capital Projects and Traffic Engineering Division (CPTED), Department of Transportation (DOT)  
Vanessa Aguayo, Transportation Planner III, CPTED, DOT



**City of Fairfax, Virginia**

10455 Armstrong Street • Fairfax, VA 22030-3630  
703-385-7930 • [www.fairfaxva.gov](http://www.fairfaxva.gov)

October 26, 2017

Greg Goodwin  
Metropolitan Washington Council of Governments  
777 N. Capitol St., NE, Suite 300  
Washington, DC 20002-4290

Dear Mr. Goodwin:

Attached please find the City of Fairfax's forecasts for population, households and employment for the period 2015 to 2045. These forecasts, calculated at the Transportation Analysis Zone (TAZ) level, are being submitted as part of the Cooperative Forecasting and Data Subcommittee's Round 9.1 forecasts.

Because the City of Fairfax did not fully participate in the Round 9.0 forecasts, our staff updated COG's 9.0 forecasts for 2015, and then used those revised numbers as benchmarks for this round of forecasts.

It should be noted that the City of Fairfax's population and housing unit forecasts, as submitted, show a high rate of growth between 2015 and 2025 that is significantly higher than growth rates of the recent past. This is due to a significant number of approved and potential residential projects that will likely come on line prior to 2025. These projects include:

- **Approved Project:** Scout on the Circle (392 multifamily units);
- **Approved Project:** Novus Fairfax Gateway (403 multifamily units);
- **Approved Project:** Layton Hall Apts. Redevelopment (360 multifamily units [250 net new]);
- **Approved Project:** The Enclave (80 multifamily units);
- **Likely Project:** Paul VI High School Redevelopment (18-acre multifamily/townhouse) active redevelopment proposal.

The short-term forecasts (up to 2025) for population, housing units and employment growth include these projects as well as others that have been recently completed, are under construction, or are anticipated during that period.

Longer-term forecasts (2030-2045) are based on anticipated growth trends for each TAZ area.

Should you have any questions regarding these forecasts, or the assumptions on which they are based, please do not hesitate to contact me.

Sincerely,

Brooke D. Hardin  
Director, Community Development and Planning



# CITY OF FALLS CHURCH

November 7, 2017

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:

I am forwarding you the enclosed preliminary Jurisdictional Round 9.1 Cooperative Forecasts for the City of Falls Church, Virginia. The short-term future population and household increases are based on recently built and projected new housing starts primarily associated with approved, planned and projected mixed-use developments. Minor adjustments are anticipated in the numbers and final TAZ counts and will be reflected in the city's updated final count to be submitted, by December 1, 2017.

The at-place employment forecasts are based upon projected new office, hotel and retail construction using industry standards for job generation rates. The latest at-place employment data has not yet been reflected in the post great recession 2015 and future projection years.

Should you have any questions please contact me at 703/248-5040.

Very truly yours,

James B. Snyder,  
Planning and Development Services Director

Enclosure

cc: Gary H. Fuller, AICP, CZA, Deputy Director/Program Manager Current  
Planning & Development Review  
Gregory Goodwin, MWCOG

Harry E. Wells Building • Department of Development Services, 3rd Floor, Room 300W  
300 Park Avenue • Falls Church, Virginia 22046 • 703-248-5040 Phone / 703-248-5225 Fax

[www.fallschurchva.gov](http://www.fallschurchva.gov)

**COG ROUND 9.1 COOPERATIVE FORECASTS - SUMMARY**  
**CITY OF FALLS CHURCH, VIRGINIA**  
**Preliminary November, 2017**

	Census 2010	Projection Years						
	2015	2020	2025	2030	2035	2040	2045	
POPULATION	12,332	13,100	14,200	15,500	16,400	17,000	17,300	17,600
HOUSEHOLDS	5,101	5,500	6,200	6,900	7,400	7,700	7,900	8,200
EMPLOYMENT (AT- PLACE)	11,400	12,000	14,300	16,200	17,600	18,000	18,300	18,600

Source: City of Falls Church Planning Division.



# 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

November 3, 2017

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 9.1 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 9.1 Cooperative Forecasts. These forecasts reflect revisions to the population, household, and employment numbers that were part of the Round 9.0 series. 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 October 12, 2017 to approve the *2017 Fiscal Impact Committee Guidelines* and to forward the guidelines to the Loudoun Board of Supervisors for their approval. On November 8, 2017, the *2017 Fiscal Impact Committee Guidelines* will be before the Loudoun County Board of Supervisors with a recommendation from staff to approve. The guidelines document includes the committee's recommendations on forecasts of population, households, and employment through 2045.

### Round 9.1 Control Totals and Comparison to Round 9.0

The Round 9.1 countywide control totals for Loudoun are presented in the first table below. The second tables shows the difference between the Round 9.1 control totals and the Round 9.0 final totals.

### **Round 9.1 Cooperative Forecast Control Totals Loudoun County, Virginia**

	2010	2015	2020	2025	2030	2035	2040	2045
Population	312,300	368,700	422,900	458,800	479,900	494,600	502,100	507,600
Households	104,600	121,100	137,300	149,500	157,700	163,900	166,800	168,800
Employment	142,100	163,500	191,200	213,800	237,100	256,100	272,300	285,500

### **Difference in Forecasts: Round 9.1 Minus Round 9.0 Loudoun County, Virginia**

	2010	2015	2020	2025	2030	2035	2040	2045
Population	0	5,200	8,200	7,700	9,200	10,200	9,600	10,100
Households	0	0	-600	-1,300	-900	-400	-800	-500
Employment	100	-700	3,100	2,600	1,500	300	-1,800	-5,400

### Residential

The household and population forecasts have been revised to account for recent development activity, rezonings, by-right project subdivision and site plan activity, market conditions, and future land use/development constraints. Loudoun's prior submission of the cooperative forecasts was in March 2016 for Round 9.0. Since then, there have been no large residential or mixed-use rezonings and no comprehensive plan amendments that have led to major changes to the County's overall household totals. The updated forecasts indicate a slight increase of 500 households and a more substantial increase in the population forecasts (10,100), both of which reflect two key elements.

- 1) Updates to the 2015 households and population using Loudoun's recently improved population estimates methodology. Loudoun's improved methodology also provides current estimates through 2017, which were used as a basis for forecasting 2020 to 2045.
- 2) Updates to household size and vacancy rate assumptions by unit type.

### Non-Residential

Like the residential forecasts, the employment forecasts were revised to account for recent development, rezonings, and current market conditions for non-residential development. The employment forecasts have been updated to reflect five key elements.

- 1) Updates to the 2015 employment figure using newly available 2015 employment data from various sources. As a basis for forecasting 2020 to 2045, the employment base year that laid the foundation for Loudoun's Round 9.1 control total forecasts was 2016. The 2016 estimate utilized newly available employment data.
- 2) Updated assumptions of vacancy rates by employment type.
- 3) Updated assumptions of square feet per employee for retail.
- 4) Reduced expectations for new office and retail development given the softness and changing dynamics of the office and retail market.
- 5) Significant increases in data centers and public facilities in the short term.

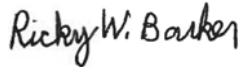
The result is a reduction in the employment forecast of about 5,400 jobs throughout the forecast period.

### Retail and Population Growth Balance

At the October 10, 2017 COG Forecasting Committee meeting, COG asked jurisdictions to include in their transmittal letter information about the balance of retail and population growth in their jurisdiction. Based on COG's research, the absolute difference between retail and population growth rates should typically be less than 16 percent and there should be between 6 and 13 new residents per new retail job. The absolute difference between Loudoun's 2015 to 2045 retail employment and population growth rates is approximately 5% and for the same time period there are 7 new residents added per retail job. These figures indicate that Loudoun's forecasts of population are balanced per COGs guidelines.

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  
Phyllis J. Randall, Chair 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  
Vice Chairman of the MWCOG Board of Directors  
Tim Hemstreet, County Administrator  
Joe Kroboth, Director, Department of Transportation and Capital Infrastructure  
Buddy Rizer, Director, Department of Economic Development  
Jill Kaneff, Demographer, Department of Planning and Zoning  
Judi Birkitt, Planning and Zoning Manager, Department of Planning and Zoning*



Christopher E. Martino  
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

### BOARD OF COUNTY SUPERVISORS

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Jeanine M. Lawson, Vice Chairman  
Ruth M. Anderson  
Maureen S. Caddigan  
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Martin E. Nohe  
Frank J. Principi

November 1, 2017

**TO:** Paul DesJardin, Department of Community Planning and Services  
Metropolitan Washington Council of Governments

**FROM:** Rebecca Horner, AICP, CZA  
Director, Planning Office

Robert Mancini  
Chief Information Officer, Department of Information Technology

**RE:** COG Cooperative Forecasting Round 9.1

Enclosed please find Prince William County's submission of Round 9.1 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 is participating in Round 9.1 to update Round 9.0 with new numbers based on current estimates. The new employment figures include changes in sector growth, changes in build-out capacity due to Comprehensive Plan Amendments, new construction, and rezonings. For households, the forecast reflects changes in vacancy rate, housing type, the build-out capacity due to Comprehensive Plan Amendments, new construction, and rezonings. The population projection accounts for changes in household size, vacancy rate, housing type, new information on group quarters, and new construction.

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

Attachment

CC: Chris Martino, County Executive  
Chris Price, Deputy County Executive  
Elijah Johnson, Deputy County Executive  
Michelle Casciato, Deputy County Executive

Brian Engelmann, County Demographer  
Angie Mills, GIS Division Chief  
Rick Canizales, Transportation Director  
David McGettigan, Long Range Planning

**Prince William County, Virginia**  
**Households, Population, and Employment Projections, 2015 to 2045**  
**Submission for COG Round 9.1**  
**Revised 11/2/17**

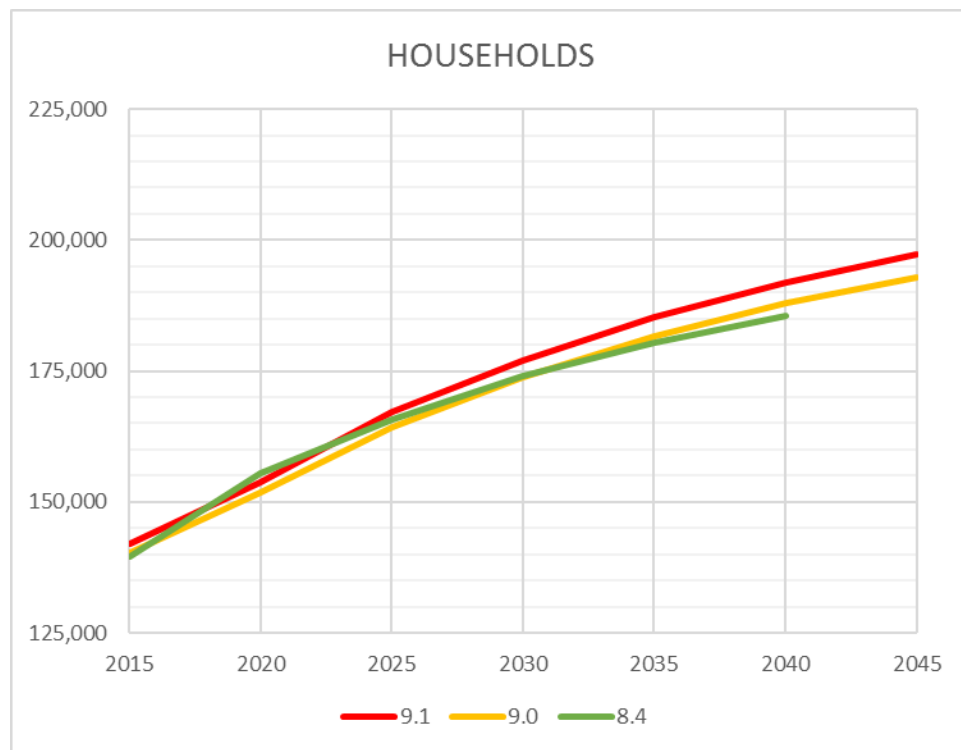
	2010	2015	2020	2025	2030	2035	2040	2045
Households	130.8	142.1	153.8	167.1	177.0	185.3	192.0	197.3
Population	402.0	441.6	470.4	504.2	530.0	551.6	569.5	584.0
Employment	122.3	143.1	164.8	184.5	203.9	222.5	240.9	257.1

**COG ROUND 9.1 PROJECTIONS**  
**PRINCE WILLIAM COUNTY**  
*November 2017*

HOUSEHOLDS								
	9.1	9.1 Year- over-Year Change	9.1 Year- over-Year Growth	9.0	9.0 Year- over-Year Change	9.1 to 9.0 Difference	8.4	9.1 to 8.4 Difference
<b>2015</b>	142,057			140,400		1,657	139,500	2,557
<b>2020</b>	153,836	11,779	8.3%	151,861	11,461	1,975	155,500	-1,664
<b>2025</b>	167,110	13,274	8.6%	164,373	12,512	2,737	165,700	1,410
<b>2030</b>	177,036	9,926	5.9%	173,773	9,400	3,263	174,000	3,036
<b>2035</b>	185,271	8,235	4.7%	181,615	7,842	3,656	180,500	4,771
<b>2040</b>	191,952	6,681	3.6%	187,940	6,325	4,012	185,500	6,452
<b>2045</b>	197,276	5,323	2.8%	192,892	4,952	4,384		
<b>Upper Limit (Logistic):</b>	215,000			210,000			200,000	

**Justification:**

Prince William County's household and population estimates for 2016 were updated based on new average household size and occupancy estimates. These updates resulted in higher estimates than previously calculated, particularly for population. There is a slight uptick in projected households between the 9.0 and 9.1 models. The household projections have also taken into account increases reflected in the county's most recent build-out analysis. The model suggests that the county could approach nearly 200,000 households by 2045.

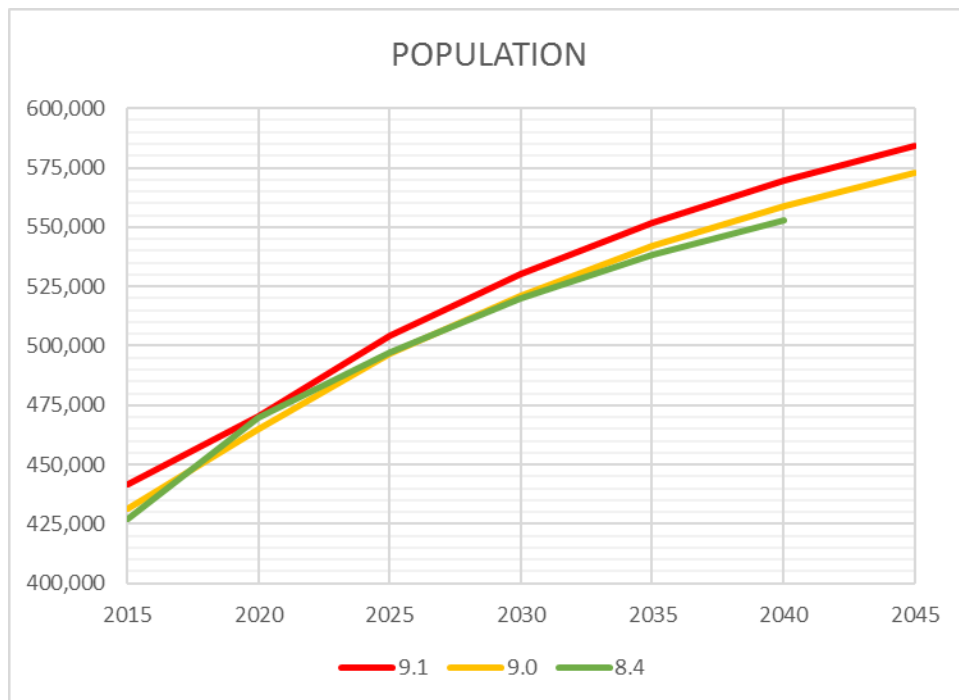


**COG ROUND 9.1 PROJECTIONS**  
**PRINCE WILLIAM COUNTY**  
*November 2017*

POPULATION								
	9.1	9.1 Year-over-Year Change	9.1 Year-over-Year Growth	9.0	9.0 Year-over-Year Change	9.1 to 9.0 Difference	8.4	9.1 to 8.4 Difference
<b>2015</b>	441,627			431,217		10,410	427,200	14,427
<b>2020</b>	470,351	28,724	6.5%	464,711	33,494	5,640	469,800	551
<b>2025</b>	504,240	33,889	7.2%	496,701	31,990	7,539	497,400	6,840
<b>2030</b>	530,030	25,791	5.1%	521,261	24,560	8,769	520,000	10,030
<b>2035</b>	551,634	21,604	4.1%	541,928	20,667	9,706	538,200	13,434
<b>2040</b>	569,459	17,824	3.2%	558,931	17,003	10,528	552,700	16,759
<b>2045</b>	584,009	14,550	2.6%	572,849	13,918	11,160		

**Justification:**

The 9.1 population projections reflect new estimates of the county's 2011-2016 population implemented in 2016 and 2017. Most notably, the 10,410-person difference in 2015 between 9.0 and 9.1 estimates are due to these updates. The county's population was substantially undercounted in the years following the 2010 Census, which prompted a careful update of the baseline housing dataset and estimates of household sizes and occupancy rates. After the updates were applied to the 2016 population estimate, they were reapportioned back to 2011. Average household and family sizes experienced upward creep over the years, resulting in more residents per household. The county's average household size has risen from 3.00 in 2006-2010 to 3.17 in 2011-2015. Likewise, the county's average family size has increased from 3.38 in 2006-2010 to 3.60 in 2011-2015 (U.S. Census American Community Survey (ACS) 5-Year estimates). Additionally, changes in occupancy rates have impacted population estimates. The percentage of occupied housing units in the county have increased from 93.28% in 2006-2010 to 95.80% in 2010-2015. The county GIS Division places the most recent estimates for average household size in the county at 3.39 for single-family detached, 3.02 for single-family attached, and 2.30 for multi-unit dwellings. The most recent occupancy rate estimates are 97.49% for single-family detached, 95.83% for single-family attached, and 93.40% for multi-unit dwellings (estimates derived from 2010 Census, PUMS ACS 2015 5-Year, and ACS 5-Year county-wide data). These estimates were reduced by a factor of 0.985 for the 2020-2045 projections as it is likely that household size will fluctuate over time and not continue to rise unabated.



**COG ROUND 9.1 PROJECTIONS**  
**PRINCE WILLIAM COUNTY**  
*November 2017*

<b>EMPLOYMENT</b>								
	9.1	9.1 Year-over-Year Change	9.1 Year-over-Year Growth	9.0	9.0 Year-over-Year Change	9.1 to 9.0 Difference	8.4	9.1 to 8.4 Difference
<b>2015</b>	143,068			144,613		-1,545	133,500	9,568
<b>2020</b>	164,821	21,752	15.2%	164,960	20,347	-139	153,600	11,221
<b>2025</b>	184,462	19,642	11.9%	184,388	19,428	74	172,600	11,862
<b>2030</b>	203,855	19,392	10.5%	204,541	20,153	-686	193,200	10,655
<b>2035</b>	222,540	18,685	9.2%	223,103	18,562	-563	214,600	7,940
<b>2040</b>	240,910	18,370	8.3%	245,139	22,036	-4,229	237,000	3,910
<b>2045</b>	257,111	16,200	6.7%	258,280	13,141	-1,169		

**Justification:**

The employment projection model for Prince William County was transitioned to a logistic projection method from linear regression. Ideally, the employment model should match the household and population logistic projection methods. With a CES adjustment factor of 1.066, a self-employment adjustment factor of 1.08, and military employment of 7,465, baseline employment for 2015 is estimated at 143,068 and will likely rise to nearly 165,000 by 2020. Because of the transition from linear to logistic growth, the differences in employment projections for the 2035-2045 between 9.0 and 9.1 are more substantial. Similar to the household and population model, the upper limit method was used in the employment logistic curve. It was determined that an upper limit of 300,000 jobs was appropriate for the county. At-place employment in Prince William is projected to experience consistent, yet stabilizing growth. A core component of the county's new strategic plan pushes for greater economic development and a greater proportion of the county's tax base drawing from commercial and industrial establishments.



**COG ROUND 9.1 PROJECTIONS**  
**PRINCE WILLIAM COUNTY**  
*November 2017*

<b>EMPLOYMENT BY SECTOR</b>								
	<b>Industrial</b>	<b>Retail</b>		<b>Office</b>	<b>Other</b>	<b>Total</b>		
<b>2005</b>	14%	30%		36%	20%	100%		
<b>2010</b>	13%	31%		31%	25%	100%		
<b>2015</b>	14%	33%		31%	23%	100%		
<b>2020</b>	15%	30%		31%	24%	100%		
<b>2025</b>	15%	30%		31%	24%	100%		
<b>2030</b>	15%	30%		31%	24%	100%		
<b>2035</b>	15%	29%		31%	25%	100%		
<b>2040</b>	15%	29%		31%	25%	100%		
<b>2045</b>	15%	28%		31%	26%	100%		
	<b>Industrial</b>	<b>Retail</b>		<b>Office</b>	<b>Other</b>	<b>Total</b>		
<b>2015</b>	18,760	44,760		44,483	35,065	143,068		
<b>2020</b>	22,999	53,709		50,774	37,339	164,821		
<b>2025</b>	27,669	55,339		57,183	44,271	184,462		
<b>2030</b>	30,578	61,157		63,195	47,906	203,855		
<b>2035</b>	33,381	66,762		68,987	53,410	222,540		
<b>2040</b>	36,137	69,864		74,682	59,023	240,910		
<b>2045</b>	38,567	74,562		79,704	64,278	257,111		

**Justification:**

In accordance with historical data from the Bureau of Labor Statistics and the Virginia Employment Commission, and in tandem with national trends, the percentage of at-place employment in retail has shrunk from 22.2% in 1995 to 18.8% in 2015. Therefore, the county has agreed to adjust retail's share of the employment sector to gradually decrease. Although the county will always have a strong retail base, the county anticipates greater increases in industrial activity linked with information and technology as well as increases in healthcare and accommodation services with a rapidly aging population. The county also anticipates office employment shares to remain consistent over time.