



Round 10 Cooperative Forecasts 2021 PRELIMINARY WORK PLAN DRAFT October 8, 2021

BACKGROUND AND PURPOSE

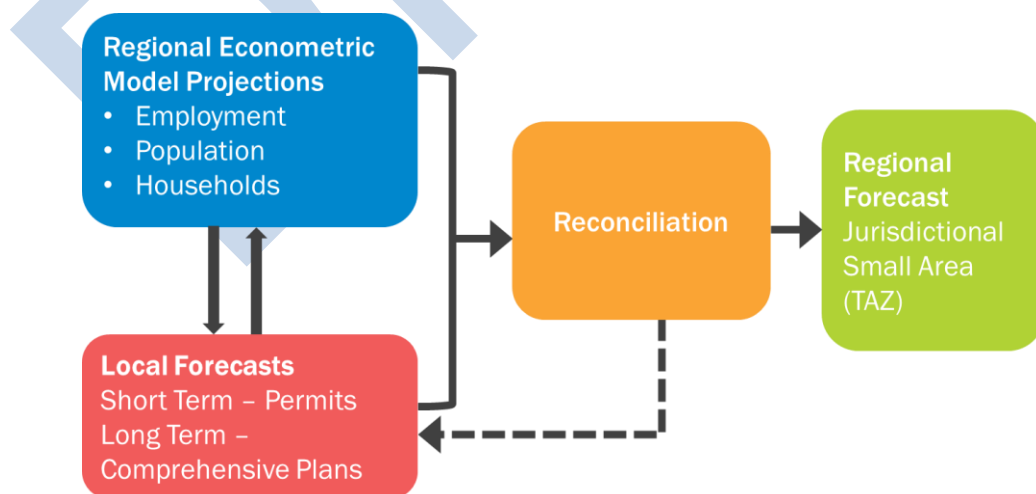
The Cooperative Forecasts are the official employment, population and household projections for COG member local governments, based on common assumptions about future growth. The Forecasts are widely used as technical inputs for local and regional planning and to guide capital investment decisions. This memo outlines major elements, products, and milestones for “Round 10” - the next major planned update to the Cooperative Forecasts.

THE COOPERATIVE FORECASTING PROGRAM

COG established the Cooperative Forecasting Program in 1975, and the first major series or "Round" of Forecasts was adopted in 1976. The Cooperative Forecasting program is a multi-stage, “top-down/bottom-up” technical process led by the Planning Directors Technical Advisory Committee (PDTAC) and the Cooperative Forecasting and Data Subcommittee (CFDS). The Program employs a regional econometric model and local jurisdictional forecasts. The IHS Markit model projects employment, population, and heads of households for the metropolitan Washington region based on national economic trends. Concurrently, local government planners develop short-term benchmark projections (5 to 10 years) based upon current development activity (rezonings, construction and permitting, etc.) and long-term benchmark forecasts (15 to 25 years) guided by local comprehensive, land use, and small area plans. COG staff, PDTAC members and CFDS members work to reconcile the regional econometric model and local jurisdictional benchmark projections. Local planners then develop Transportation Analysis Zone (TAZ) level forecasts for each forecast year. The Round 9.1 Cooperative Forecasts was approved by the COG Board of Directors in October 2018, while the latest update – Round 9.2 – was transmitted to the TPB staff in early 2021.

The development of a major round of Cooperative Forecasts is a significant commitment by COG and its member governments that is anticipated to take more than 1 year to complete.

Cooperative Forecasting Process



ROUND 10 COOPERATIVE FORECAST: KEY ASSUMPTIONS, TASKS AND PRODUCTS

To develop and complete the Round 10 Cooperative Forecasts, CFDS, PDTAC, and COG staff synthesize national and regional economic and demographic trends with local planning assumptions. Key elements of a new Round will include:

| Relevant Discussions/Topics | Tasks and Products | Responsible Party | Time Frame |
|---|--|--|---|
| Develop Work Plan & Schedule | <ul style="list-style-type: none"> Develop work plan and timetable for products and milestones | COG Staff CFDS Members PDTAC Members | Summer/Fall 2021 |
| Confirm Key Round 10 Planning Assumptions | <ul style="list-style-type: none"> Discuss key assumptions about Round 10 (ex. new base year 2020, planning horizon year 2050, TAZ system (COG 3722), refine actual types of jobs included in employment land use categories (industrial, retail, office, and other). | CFDS Members PDTAC Members COG Staff | Fall 2021 |
| COVID-19 Impacts to Future Growth | <ul style="list-style-type: none"> Examine post-pandemic trends relating to teleworking and possible impact on future office space needs. Impact of outmigration, housing costs on residential forecasts | CFDS Members PDTAC Members COG Consultant | Fall 2021 / Winter 2022 Winter / Spring 2022 |
| Commercial Space Utilization Assumptions for Office, Retail, Industrial, Other | <ul style="list-style-type: none"> Review current assumptions of workers per square foot Develop recommendations for updating or revising. Include other miscellaneous land uses ex. data centers, hotels. Federal government Workforce Optional: Review trends for changes to office space utilization, coworking spaces, etc. | CFDS Members COG Consultant COG Consultant GSA/NCPC Staff COG Consultant | Winter / Spring 2022 |
| Demographic Assumptions | <ul style="list-style-type: none"> Future average household size (people per household) assumptions for local government analysis | CFDS Members COG Consultant CFDS Members | Spring / Summer 2022 |

| | | | |
|---|--|-------------------------------------|---------------------------------------|
| | <ul style="list-style-type: none"> Differential Privacy Consider development of demographic forecast model (Age/Race/Gender) Short-term and long-term foreign immigration trends | COG Consultant CFDS Members | . |
| Benchmarking to Year 2020 | <ul style="list-style-type: none"> Develop 2020 Census Base Year by Census Blocks into COG TAZs. Develop 2020 Employment Base year database by TAZs (Industrial, Retail, Office, and Other) Update COG Employment Base Line Guidance Memo | COG Staff COG staff COG Staff | Fall 2021 Fall 2021 Spring 2022 |
| Local Forecasting Procedures/Methodology | <ul style="list-style-type: none"> Members present their local forecasting procedures and methodology to help identify “best practices”. | CFDS Members | Ongoing |
| New Econometric Model | <ul style="list-style-type: none"> Develop Round 10 Econometric Model Consider development of a range of REGIONAL forecasts (ex. Low, Intermediate, and High) | COG Staff COG Consultant | Spring / Summer 2022 |
| New Round 10 Jurisdictional/Benchmark Totals (5-yr. Intervals – 2020 – 2050) | <ul style="list-style-type: none"> Submit to COG new jurisdictional benchmark demographic and employment forecasts and official transmittal Letter (Summary Tables) | CFDS Members | Fall 2022 |
| Round 10 Model – Reconciliation with Local Forecasts | <ul style="list-style-type: none"> Work with local governments to identify inconsistencies and adjust forecasts as needed. | COG Staff CFDS Members | Fall 2022 |
| New Round 10 TAZs level data (5-yr. Intervals – 2020 – 2050) | <ul style="list-style-type: none"> Submit to COG new demographic and employment forecasts by TAZ | CFDS Members | January 2023 |
| Coordination with other MPOs and adjoining jurisdictions to obtain growth Forecasts for TPB model region | <ul style="list-style-type: none"> BMC FAMPO Assist Clarke, Fauquier, Calvert, St. Mary's, and Jefferson counties | COG Staff | Ongoing through Fall 2022 |

REVIEW AND APPROVAL PROCESS

As with prior Rounds, development of the new Round 10 Cooperative Forecasts will follow the previously-adopted practice for review and approval.

- | | |
|--|---------------------------|
| 1. Development and approval of a work plan and schedule | July 2021 to October 2021 |
| 2. The CFDS and PDTAC members approve benchmark Regional Economic Model Projections in 5-year increments based upon IHS Markit or similar economic data sources. | Summer 2022 |
| 3. The CFDS and PDTAC members reconcile preliminary/benchmark jurisdictional and regional forecasts with the approved Regional Economic Model totals | Summer 2022 to Fall 2022 |
| 4. PDTAC members approve draft Round 10 Forecasts | December 2022 |
| 5. The CFDS members submit small-area (TAZ) Forecasts to COG staff including transmittal letter from Planning Director | January 2023 |
| 6. The COG Board reviews and approves the 'draft' Forecasts for use by TPB in the Air Quality Conformity Analysis (AQCA) | February 2023 |
| 7. The COG Board reviews and approves the 'draft' Forecasts for use by TPB in the Air Quality Conformity Analysis (AQCA) | Exact date TBD |

PARTICIPATING JURISDICTIONS

Cooperative Forecasting and Data Subcommittee:

The Cooperative Forecasting and Data Subcommittee (CFDS) is a technical subcommittee to the Planning Directors Technical Advisory Committee (PDTAC) and the Region Forward Coalition. The committee is responsible for preparing 25-year population and employment forecasts at the transportation analysis zone (TAZ) level for COG region. The committee is composed of planners and demographers from COG member jurisdictions.

- District of Columbia Office of Planning
- Charles County Department of Planning and Growth Management
- Frederick County Department of Community Development
- City of Frederick Planning Department
- Montgomery County Planning Department
- City of Gaithersburg Department of Planning and Code Administration
- City of Rockville Department of Planning and Development Services
- Prince George's County Planning Department
- Arlington County Department of Community Planning, Housing and Development
- Fairfax County Department of Planning and Development

- Fairfax County Department of Management and Budget
- Loudoun County Department of Management and Budget
- Prince William County Planning Office
- City of Alexandria Department of Planning and Zoning
- City of Fairfax Department of Community Development and Planning
- City of Falls Church Community Planning and Economic Development Services
- City of Manassas Department of Community Development

Other jurisdictions, agencies, and MPOs with whom COG staff coordinates to obtain projections:

- Baltimore Metropolitan Council
- Fredericksburg Area Metropolitan Planning Organization
- Clarke and Fauquier counties in Virginia
- Anne Arundel, Calvert, Howard, and St. Mary's counties in Maryland
- Maryland Department of Planning
- Northern Virginia Planning Commission

DRAFT