



Metropolitan Washington
Council of Governments

ROUND 9.1 TRANSMITTAL LETTERS

AS OF NOVEMBER 29, 2017



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

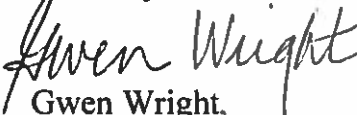
The Montgomery County Council approved this sector plan in May 2017. This plan allows for the potential for a floating zone to be requested by certain sites to accommodate future redevelopment. In addition, the plan called for the rezoning of the existing Westbard Shopping Center site to allow for additional 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



City of Fairfax, Virginia

10455 Armstrong Street • Fairfax, VA 22030-3630
703-385-7930 • 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

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

	Census	Projection Years						
	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>	<u>2040</u>	<u>2045</u>
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., 3rd 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, re-zonings, 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, re-zonings, 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.

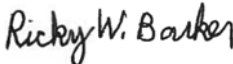
The result is a reduction in the employment forecast of about 5,400 jobs throughout the forecast period.

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*



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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Christopher E. Martino
County Executive

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.

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

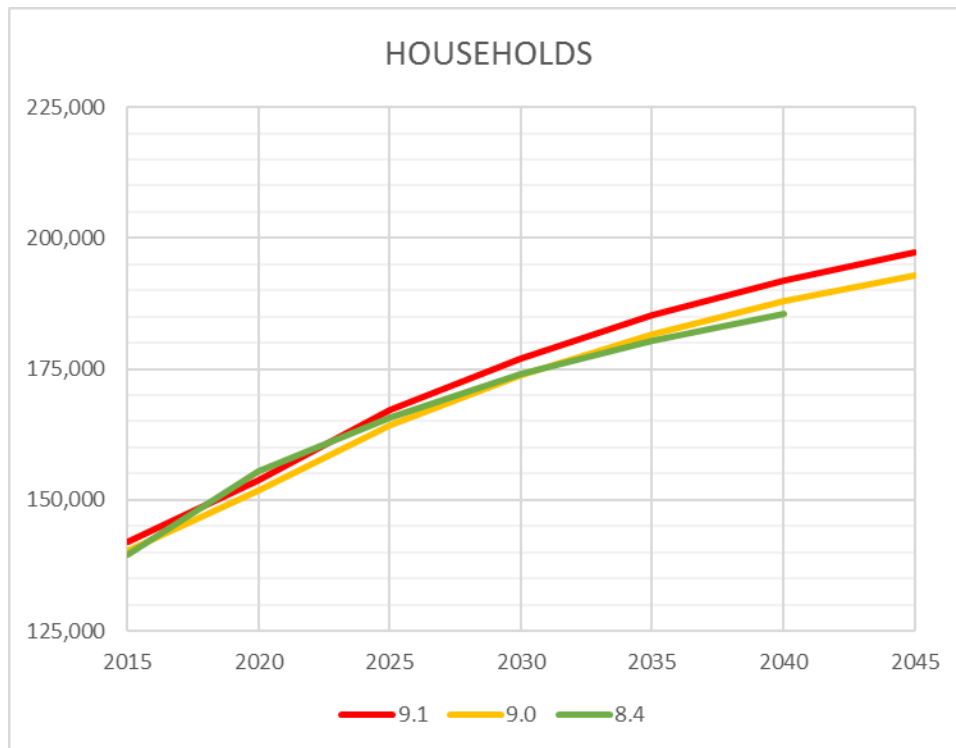
	2010	2015	2020	2025	2030	2035	2040	2045
Households	130.8	142.1	153.8	167.1	177.0	185.3	192.0	197.3
Population	402.0	441.6	470.4	504.2	530.0	551.6	569.5	584.0
Employment	122.3	143.1	164.8	184.5	203.9	222.5	240.9	257.1

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

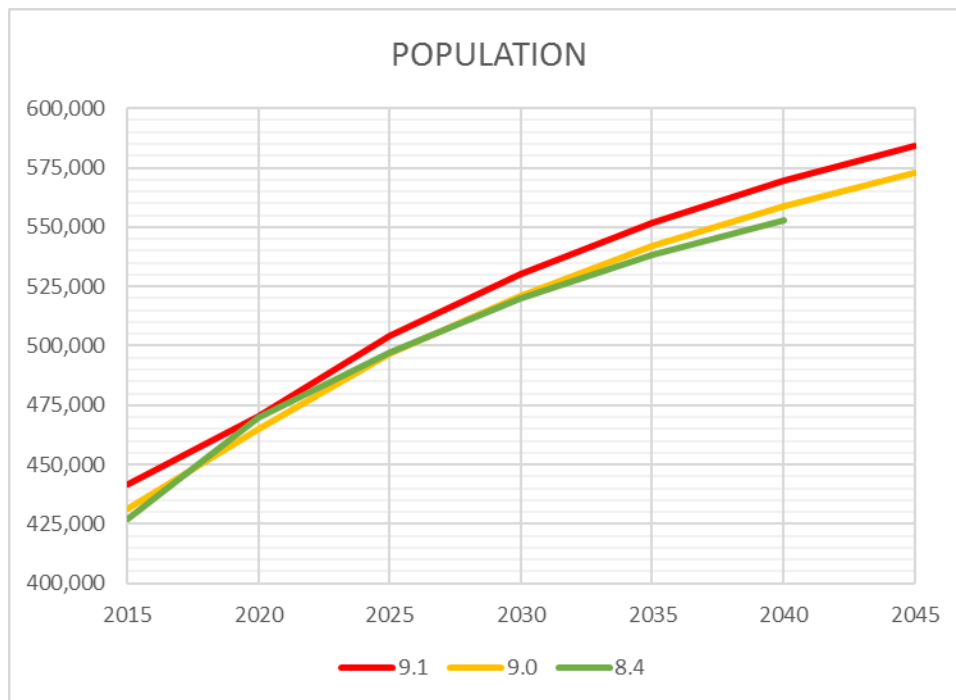


**COG ROUND 9.1 PROJECTIONS
PRINCE WILLIAM COUNTY
November 2017**

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
2015	441,627			431,217		10,410	427,200	14,427
2020	470,351	28,724	6.5%	464,711	33,494	5,640	469,800	551
2025	504,240	33,889	7.2%	496,701	31,990	7,539	497,400	6,840
2030	530,030	25,791	5.1%	521,261	24,560	8,769	520,000	10,030
2035	551,634	21,604	4.1%	541,928	20,667	9,706	538,200	13,434
2040	569,459	17,824	3.2%	558,931	17,003	10,528	552,700	16,759
2045	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**

EMPLOYMENT								
	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
2015	143,068			144,613		-1,545	133,500	9,568
2020	164,821	21,752	15.2%	164,960	20,347	-139	153,600	11,221
2025	184,462	19,642	11.9%	184,388	19,428	74	172,600	11,862
2030	203,855	19,392	10.5%	204,541	20,153	-686	193,200	10,655
2035	222,540	18,685	9.2%	223,103	18,562	-563	214,600	7,940
2040	240,910	18,370	8.3%	245,139	22,036	-4,229	237,000	3,910
2045	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

EMPLOYMENT BY SECTOR						
	Industrial	Retail		Office	Other	Total
2005	14%	30%		36%	20%	100%
2010	13%	31%		31%	25%	100%
2015	14%	33%		31%	23%	100%
2020	15%	30%		31%	24%	100%
2025	15%	30%		31%	24%	100%
2030	15%	30%		31%	24%	100%
2035	15%	29%		31%	25%	100%
2040	15%	29%		31%	25%	100%
2045	15%	28%		31%	26%	100%
	Industrial	Retail		Office	Other	Total
2015	20,179	47,124		44,549	32,761	145,050
2020	23,718	55,389		52,363	38,507	169,977
2025	28,488	56,977		58,876	45,581	189,922
2030	31,590	63,181		65,287	49,491	210,602
2035	34,929	69,859		72,187	55,887	232,862
2040	38,681	74,783		79,941	63,179	257,873
2045	41,986	81,173		86,771	69,977	279,907

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.