

*One Region Moving Forward*

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Falls Church  
Loudoun County  
Manassas  
Manassas Park  
Prince William County*

**Jurisdictional  
Transmittal Letters  
For Round 8.1**

**February 2012**

*\*Adjunct Member*

**(Jurisdictional order is based on COG's letterhead)**

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District of Columbia Office of Planning



Office of the Director

TO: Paul DesJardin, Planning Section Manager  
Metropolitan Washington Council of Governments

FROM: Harriet Tregoning, Director  
Office of Planning

A handwritten signature in black ink, appearing to read 'Harriet Tregoning', is written over the 'FROM' line of the memo.

DATE: January 11, 2012

RE: Round 8.1 Cooperative Forecast

The Office of Planning (OP), in fulfillment of its responsibilities to the Metropolitan Washington Council of Governments (MWCOC) Cooperative Forecasting and Data Subcommittee, is submitting its Round 8.1 forecast. The figures are based on demographic trends, projects under construction and in pre-development, and the capacity of vacant land.

The Round 8.1 forecast was derived using various inputs and assumptions that impact population, households and employment. Although the recession officially ended two years ago, the U.S. and local economies have yet to fully recover. The District fared better than many places throughout the recession. Population began growing again in the last decade and the economic crisis shifted the focus of financial activity from New York to the District. Housing was affected by the national collapse but sales of single family and condos have rebounded faster than other metropolitan areas. Prices are still below the peaks but the Washington DC metro area is one of the few metropolitan areas in the Case-Shiller housing price index that has had consistent positive growth recently. Commercial real estate has also outperformed expectations and the vacancy rate in the District is the lowest in the metropolitan area, and declined in FY 2010 and continues to decline in FY 2011.

The federal government's presence provides an important element of stability to the District's economy, but the current debate over the size of federal government and the momentum in Congress to drastically reduce spending to bring down the deficit is a serious risk to both the District economy and that of the wider metropolitan area.

The major projects revisited for Round 8.1 include the following: St. Elizabeth's Campus; Southwest Waterfront; New York Ave. Arboretum; I-395 Air Rights; Northwest One; and Mt. Vernon Triangle. All projects were reexamined to assess the relationships among data for population, households and employment given information on actual, planned, or proposed scenarios that may affect their outcomes.

In comparing the new forecast Round 8.1 to the past Round 8.0, as shown in the attached table, changes were made to the base year 2010 numbers for all three indicators. For the other five-year periods through 2040, the only adjustments made were to the group quarters population which then impacted the average household size for each period as well. Hence, population growth from 2010 through 2040 is forecast to increase by 26.4 percent, just 0.8 percent higher than in the previous round. A look at household numbers show a projected 1,530 fewer households by 2040 than in the previous forecast, with the same projected percentage increase of 25.8 percent through 2040. The employment growth for the District shows a 27.1 percent increase for Round 8.1, slightly lower than the 27.9 percent growth in the previous round.



To sustain and /or grow the population, households and employment forecast as presented, the following proposed policy, accomplishments and outlook are predicted to have positive impacts. The mayor’s plan to fund universal Pre-K beginning in 2012 -this translates into free all-day day care for families with young children and the incentive to both maintain and attract families to the District. On accomplishments, in the past three years, according to the DC Comprehensive Assessment System (DC CAS), both elementary and secondary District of Columbia Public School (DCPS) students have made dramatic gains in scholastics test - as much as 17 percentage points - in reading and math. This trend is likely to continue and provide a further boost to families staying in the District. In addition, enrollment numbers for the 2010-2011school year showed the number of students attending DC Public Schools (DCPS) and public charter schools jumped by 3.5 percent. Enrollment in postsecondary institutions in the District has also shown tremendous increases. Further, the District has become a magnet for young people between the ages of 20 and 34 years old. According to the 2010 Census, the District population ages 20 to 34 increased by 35,200 or 23 percent between 2000 and 2010. Given the pull factors of job opportunities, abundance of choices for leisure and hospitality, rich cultural offerings and an eclectic international ambiance, one can foresee the District remaining an attraction for young people for years to come. On the employment front, both the national and the local picture points to significant job gains as economic growth picks up after the recession and supports a brighter outlook for long-term unemployment.

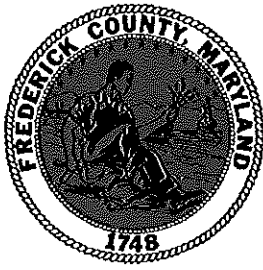
Overall, the Round 8.1 forecast is not significantly different from the previous Round 8.0. The forecast is for continued growth in population, households and employment through 2040. Altogether, the forecast is for a very resilient economy in the District of Columbia, weathering the storms in both the national financial markets and the global economy, and continuing to grow along with the nation as economic growth picks up after the recession. The District government will continue its involvement in planning for and positively affecting the economic and financial sectors of the economy. The Office of Planning stands behind its forecast given the information at hand.

**District of Columbia Round 8.1 Forecast Summary**

<b>Round 8.1</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>Change</b>	
								<b>2010-2040</b>	
								<b>Number</b>	<b>Percent</b>
Population	601,723	652,066	671,410	693,983	712,049	730,521	760,609	158,886	26.4%
Employment	783,460	824,967	872,196	903,822	932,289	958,405	985,464	202,004	25.8%
Households	266,707	287,617	297,662	309,155	317,409	325,576	339,071	72,364	27.1%
Jobs/Household Ratio	<b>2.94</b>	<b>2.87</b>	<b>2.93</b>	<b>2.92</b>	<b>2.94</b>	<b>2.94</b>	<b>2.91</b>		
Group Quarters	40,021	43,688	44,984	46,497	47,707	48,945	50,961		
Average Household Size	<b>2.11</b>	<b>2.12</b>	<b>2.10</b>	<b>2.09</b>	<b>2.09</b>	<b>2.09</b>	<b>2.09</b>		

**Previous Round 8.0 Forecast Summary**

<b>Round 8.0</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>Change</b>	
								<b>2010-2040</b>	
								<b>Number</b>	<b>Percent</b>
Population	605,513	652,066	671,410	693,983	712,049	730,521	760,609	155,096	25.6%
Employment	783,460	824,967	872,196	903,822	932,289	958,405	985,464	202,004	25.8%
Households	265,177	287,617	297,662	309,155	317,409	325,576	339,071	73,894	27.9%
Jobs/Household Ratio	<b>2.95</b>	<b>2.87</b>	<b>2.93</b>	<b>2.92</b>	<b>2.94</b>	<b>2.94</b>	<b>2.91</b>		
Group Quarters	40,400	40,804	41,212	41,624	42,040	42,460	42,885		
Average Household Size	<b>2.13</b>	<b>2.13</b>	<b>2.12</b>	<b>2.11</b>	<b>2.11</b>	<b>2.11</b>	<b>2.12</b>		



**COMMUNITY DEVELOPMENT DIVISION**  
**Department of Planning and Development Review**  
**Frederick County, Maryland 21701**

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*30 North Market Street*

*Frederick County, Maryland 21701*

*(301) 600-1138*

December 22, 2011

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

RE: Round 8.1 Jurisdictional Totals for Frederick County

Dear Mr. DesJardin:

This letter summarizes the Frederick County's Round 8.1 Cooperative Forecasts of employment, population, and household. The projections correct some erroneous assumptions and reflect historical trends due to the economic recession.

**Employment**

A significant adjustment to the 2010 employment is based on using the Maryland Department of Labor and Licensing (DLLR) ES 202 data rather than a labor force number that appears to have been the basis for the current projections. Added to the ES 202 job number are military jobs and self-employed jobs. The projected job growth for the 2010 – 2015 period reflects the growth rate experienced in the County between 2005 and 2010. Beyond 2010 we have applied the 5-year growth rates from Round 8.0.

**Population**

The 2010 population is adjusted to reflect the 2010 U.S Census figure. For the 2010 – 2015 period we assume a much lower growth rate (3.0%) than was assumed in Round 8.0 (9.2%). This lower growth rate reflects the historically lower residential building activity experienced since 2008 that is likely to continue at least to 2015. Beyond 2020 we have applied the lower of the two 5-year growth rates from either Round 8.0 or from the Maryland Department of Planning projections prepared in November 2010.

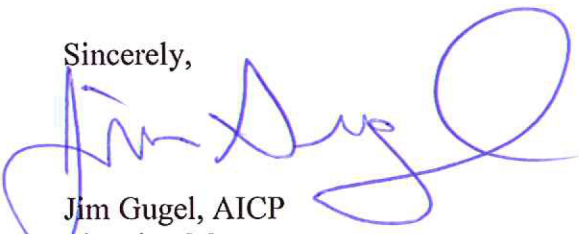
**Households**

The 2010 household number reflects the 2010 U.S Census figure for occupied households. We have assumed that the group quarters population will remain constant at 4,182 (from 2010 U.S. Census) throughout the projections. We also assume the average household size to remain at 2.70 throughout the forecast period.

YEAR	Employment	Total Population	Household Population	Total Households
2010	98695	233385	229203	84800
2015	99386	240387	236205	87483
2020	103862	254569	250387	92736
2025	107266	275045	270863	100320
2030	109755	293921	289739	107311
2035	112302	310675	306493	113516
2040	114907	325277	321095	118924

If you have questions on the data above or our methodology, please do not hesitate to call me at (301) 600-1144.

Sincerely,



Jim Gugel, AICP  
Planning Manager



**Gaithersburg**  
A CHARACTER COUNTS! CITY

January 9, 2012

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

Re: Round 8.1 Cooperative Forecast Jurisdictional Totals for the City of Gaithersburg

Dear Mr. DesJardin:

Please accept this letter as a formal transmittal of the jurisdictional total for the City of Gaithersburg, Maryland to be incorporated into the MWCOG Round 8.1 Cooperative Forecasts. These numbers are the best estimate of future development within the City limits, and have been developed in coordination with the Montgomery County Department of Planning (M-NCPPC). The forecasts for the City portion of each traffic analysis zone (TAZ) have been provided to M-NCPPC, who will then submit the final forecast totals for each TAZ to MWCOG. Please note that the only revision to the City's Round 8.0 forecast is adjustment of the base year of 2010 to match the Census household and population numbers.

Year	Round 8.1 Population	Percent Change	Round 8.1 Households	Percent Change	Round 8.1 Employment	Percent Change
2010	59,933		22,000		50,418	
5-year change	2,094	3.49%	1,584	7.20%	4,491	8.91%
2015	62,027		23,584		54,909	
5-year change	5,150	8.30%	2,105	8.93%	7,586	13.82%
2020	67,177		25,689		62,495	
5-year change	4,912	7.31%	2,251	8.76%	4,628	7.41%
2025	72,089		27,940		67,123	
5-year change	4,574	6.34%	2,412	8.63%	5,509	8.21%
2030	76,663		30,352		72,632	
5-year change	4,373	5.70%	1,892	6.23%	6,953	9.57%
2035	81,036		32,244		79,585	
5-year change	3,577	4.41%	1,548	4.80%	3,798	4.77%
2040	84,613		33,792		83,383	
<b>Change 2010-2040</b>	<b>24,680</b>	<b>41.18%</b>	<b>11,792</b>	<b>53.60%</b>	<b>32,965</b>	<b>65.38%</b>

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

Sincerely,

Lauren Pruss  
Planning Director

cc: Greg Goodwin  
Kirk Eby

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

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City of  
**Rockville**  
Get Into It

111 Maryland Avenue | Rockville, Maryland 20850-2364 | 240-314-5000  
www.rockvillemd.gov

December 2, 2011

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

Re: Round 8.1 Cooperative Forecast Jurisdictional Totals for the City of Rockville

Dear Mr. DesJardin:

This letter serves as a formal transmittal of the jurisdictional totals for the City of Rockville, Maryland to be incorporated into the Council of Governments Round 8.1 Cooperative Forecasts. These numbers are the best estimate of future development within the City boundary, and have been developed in coordination with the Montgomery County Department of Park and Planning.

The totals for City of Rockville's forecast of population, households and employment are as follows:

**Round 8.1 Estimates of Population, Households and Employment**

Year	Round 8.1 Population	Percent Change	Round 8.1 Households	Percent Change	Round 8.1 Employment	Percent Change
2010	61,209		25,199		74,550	
<b>5-year Change</b>	<b>2,584</b>	<b>4.2%</b>	<b>1,219</b>	<b>4.8%</b>	<b>6,368</b>	<b>8.5%</b>
2015	63,793		26,418		80,919	
<b>5-year Change</b>	<b>5,332</b>	<b>8.4%</b>	<b>2,545</b>	<b>9.6%</b>	<b>3,545</b>	<b>4.4%</b>
2020	69,125		28,963		84,464	
<b>5-year Change</b>	<b>2,958</b>	<b>4.3%</b>	<b>1,412</b>	<b>4.9%</b>	<b>8,864</b>	<b>10.5%</b>
2025	72,083		30,375		93,328	
<b>5-year Change</b>	<b>3,222</b>	<b>4.5%</b>	<b>1,438</b>	<b>4.7%</b>	<b>6,231</b>	<b>6.7%</b>
2030	75,305		31,813		99,559	
<b>5-year Change</b>	<b>3,652</b>	<b>4.8%</b>	<b>1,743</b>	<b>5.5%</b>	<b>2,659</b>	<b>2.7%</b>
2035	78,957		33,556		102,217	
<b>5-year Change</b>	<b>3,457</b>	<b>4.4%</b>	<b>1,650</b>	<b>4.9%</b>	<b>3,429</b>	<b>3.4%</b>
2040	82,414		35,206		105,647	
<b>30-Year change</b>	<b>21,205</b>	<b>34.64%</b>	<b>10,007</b>	<b>39.71%</b>	<b>31,096</b>	<b>41.71%</b>

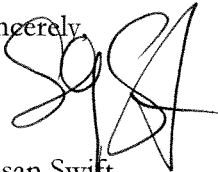


Rockville's commercial base for Round 8.1 is the same as that of Round 8, which are a total of 74,550 jobs-at-place in 2010. To accommodate for the economic conditions in the recent past, a vacancy rate of 15% was assumed for the base year 2010 for office space. For future years, the vacancy rates assumed for office space is 8%. We are at present only applying vacancy rates to office space, and not to retail, industrial or other institutional spaces in conformance with the practice of the general COG region. We recommend that vacancy rates be used in future rounds for these other spaces.

Rockville's residential base is adjusted to be consistent with the census results. Per the decennial census 2010, the City of Rockville's 2010 population was 61,209 and total housing units in the city were 25,199, which is our 2010 base in Round 8.1.

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

Sincerely,

A handwritten signature in black ink, appearing to read 'SSA', written over the word 'Sincerely'.

Susan Swift,  
Director of Community Planning and Development Services

Cc: Manisha Tewari, Planner  
David Levy, Chief, Long Range Planning and Redevelopment  
Richard DeBose, Division Chief, Research and Technology, M-NCPPC



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

January 30, 2012

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

Re: Round 8.1 Cooperative Forecast Jurisdictional Totals for Montgomery County

Dear Mr. DesJardin:

This letter serves as a formal transmittal of the jurisdictional totals for Montgomery County , Maryland to be incorporated into the Council of Governments Round 8.1 Cooperative Forecasts. These numbers are the best estimate of future development within the County, and have been developed in coordination with the cities of Rockville and Gaithersburg.

The totals for Montgomery County's forecast of population, households and employment are as follows:

YEAR	Round 8.1 Population	5 yr change	Percent Change	Round 8.1 Households	5 yr change	Percent Change	Round 8.1 Employment	5 yr change	Percent Change
2010	971,777	na	na	357,086	na	na	510,502	na	na
2015	1,015,759	43,982	4.5%	376,388	19,302	5.4%	542,394	31,892	6.2%
2020	1,065,618	49,859	4.9%	400,186	23,798	6.3%	585,758	43,364	8.0%
2025	1,109,922	44,304	4.2%	418,673	18,487	4.6%	633,619	47,861	8.2%
2030	1,154,188	44,266	4.0%	437,961	19,288	4.6%	684,706	51,087	8.1%
2035	1,185,710	31,522	2.7%	452,175	14,214	3.2%	714,864	30,158	4.4%
2040	1,204,088	18,378	1.5%	462,628	10,453	2.3%	737,789	22,925	3.2%

If you have any questions regarding the forecasts, please do not hesitate to call me at (301) 650-5612.

Sincerely,

Richard DeBose, AICP  
 Chief, Research Division  
 MNCPPC- Montgomery County Planning Department

Cc: Manisha Tewari, Planner, Rockville  
David Levy, Chief, Long Range Planning and Redevelopment, Rockville

February 1, 2012

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 8.1 Cooperative Forecast for  
Prince George's County**

Dear Mr. DesJardin:

This letter transmits Prince George's County's Round 8.1 Cooperative Forecast, which supersedes Round 8.0. The 2010 Decennial Census figures for dwelling units, households, and population are used as a base for 2010, so they differ from the 2010 projected Round 8.0 figures. Along with the adjustments made to the base numbers for 2010, the assumptions previously used in Round 8.0 to project population growth were modified to reflect an increase in average household size and a reduction in dwelling unit completions, due to the housing crisis. The Round 8.1 employment forecast was modified to reflect a new employment base for 2010, current economic conditions, and the impact of the recent recession.

In Round 8.0 dwelling units were projected based on historical trends. An average household size model was utilized to project population for the forecasting period. In previous rounds average household size was projected to gradually decline. However, the 2010 decennial census revealed an increase in average household size for the county, contrary to former trends. Because of this unexpected upturn in average household size, it is difficult to predict what the impact will be on the trend in average household size for the future. Therefore, the Round 8.1 forecast is calculated based on a household population to dwelling unit ratio method, versus the average household size model that is traditionally used. The resulting projections show future growth more along the lines of rounds prior to Round 8.0.

Round 8.1 population and household projections are based on a household population to dwelling unit ratio that takes into account the increase in average household size experienced in the county. The projection for dwelling units is based on a simple linear regression for single-family units, and a polynomial s-curve trend for multi-family units, based on historic completions from 1980-2010. These figures have also been slightly adjusted in the near term to account for historically high vacancy rates, reduction in completions, and the economic recession.

The projections for employment in Round 8.1 have been adjusted using a modified 2010 employment base figure estimate from the Bureau of Labor Standards (BLS), a military count from the Bureau of Economic Analysis (BEA), and a self-employment-ratio based on population. The assumptions for projecting employment based on growth in the county's job-to-population ratio remain unchanged from Round 8.0. However we will be changing our methodology for calculating employment growth, starting with the next cooperative forecast, to better reflect historical trends and the effects of the economic recession.

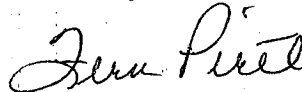
The following table shows the county's new control totals for population, employment, dwelling units, and households, with adjustments for the 2010 Decennial Census, reassessment of historical trends, and current economic conditions in the short term.

### Round 8.1 Cooperative Forecast for Prince George's County

Year	Population	Employment	Dwelling Units	Households
2010	863,420	342,588	328,182	304,042
2015	881,379	356,958	342,144	323,364
2020	899,712	377,879	355,942	336,404
2025	926,744	403,134	368,850	348,604
2030	950,030	427,514	380,779	359,878
2035	972,926	457,275	391,641	370,144
2040	995,303	497,652	401,347	379,317

Questions regarding this information should be directed to Ms. Jacqueline Philson, Planning Supervisor of our Research Section, at 301-952-3627.

Sincerely,



Fern Piret  
Planning Director

- c: Al Dobbins, Deputy Planning Director, Office of the Planning Director
- Derick Berlage, Chief, Countywide Planning Division
- Jacqueline Philson, Planning Supervisor, Research Section, Countywide Planning Division
- Ted Kowaluk, Senior Planner, Research Section, Countywide Planning Division
- Chalita Brandy, Senior Planner, Research Section, Countywide Planning Division



DEPARTMENT OF PLANNING AND ZONING

301 King Street, Room 2100

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Alexandria, Virginia 22313

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Phone (703) 838-4666

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January 19, 2012

Paul DesJardins  
Planning Section Manager  
Metropolitan Washington Council of Governments  
777 North Capitol Street, N.E.  
Washington, D.C. 20002

Dear Mr. DesJardins,

Below are the City of Alexandria's forecasts of population, households and employment for the Council of Governments Round 8.1 Cooperative Forecasts. The forecasts reflect an adjustment of baseline population and households to the 2010 Census, and a higher rate of development in the periods ending in 2020 and 2025 based on assumed completion of the Potomac Yard Metro Station and other significant proposed transit system improvements in Alexandria that are currently in feasibility analysis.

	2010	2015	2020	2025	2030	2035	2040
<b>Housing Units</b>	72,736	76,069	80,147	84,444	88,751	93,048	97,311
<b>Households</b>	68,082	71,504	75,739	80,222	84,314	88,396	92,446
<b>Population</b>							
In Housing Units	138,139	145,154	153,750	162,850	171,157	179,443	187,665
Group Quarters	1,827	1,911	2,013	2,121	2,229	2,337	2,444
<b>Total</b>	<b>139,966</b>	<b>147,065</b>	<b>155,763</b>	<b>164,971</b>	<b>173,386</b>	<b>181,780</b>	<b>190,109</b>
<b>Employment</b>							
Office	57,000	65,281	72,075	81,546	90,034	96,992	104,488
Retail	27,500	28,194	28,906	29,636	30,385	31,152	31,939
Industrial	7,000	6,491	5,574	4,427	3,426	2,651	2,051
Other	15,000	15,379	15,767	16,165	16,573	16,992	17,421
<b>Total</b>	<b>106,500</b>	<b>115,344</b>	<b>122,322</b>	<b>131,775</b>	<b>140,418</b>	<b>147,787</b>	<b>155,898</b>

Sincerely yours,

Karl Moritz, Deputy Director for Long-Range and Strategic Planning  
Department of Planning and Zoning



DEPARTMENT OF COMMUNITY PLANNING, HOUSING AND DEVELOPMENT  
Planning Division

#1 Courthouse Plaza, 2100 Clarendon Boulevard, Suite 700, Arlington, VA 22201  
TEL 703.228.3525 FAX 703.228.3543 www.arlingtonva.us

January 17, 2012

Paul DesJardins  
Planning Section Manager  
Metropolitan Council of Governments  
777 North Capitol Street, N.E.  
Washington, DC 20002

Dear Paul:

Attached are Arlington County's county-wide totals of population, households and employment for the Council of Governments Round 8.1 Cooperative Forecasts. New for Round 8.1 we incorporated a) population and household counts from the 2010 Census, b) changed the methodology for the calculation of an employment base, c) altered employment forecast assumptions, and d) introduced refinements to the phasing of assumed development in Columbia Pike and Crystal City.

The Round 8.1 population figures incorporate 2010 Census counts. These counts are supplemented in the forecasted year 2015 with additional population and households derived from 1,100 housing units not counted by the Census Bureau in the decennial census. These 1,100 housing units are included in Arlington County's submittal to the Bureau's *2010 Census Count Question Resolution Program*. The assumptions used to calculate forecasted population and households were altered from those used in Round 8.0 by the use of Metro Station Area-wide vacancy and average household size factors. Previously, these factors were based on both housing-unit type *and* Metro Station Area information, but the lack of reliability in American Community Survey figures made this unfeasible.

Arlington County's Round 8.1 employment forecast figures incorporate new methodologies for estimating and forecasting employment. The base or 2010 employment estimate was calculated using a new methodology that employed comparing second quarter employment figures reported in the Quarterly Census of Employment and Wages (QCEW) and InfoUSA with estimated employment derived from Census block-level commercial GFA. If the difference surpassed specific thresholds, then GFA derived employment was used. Census blocks affected tended to have high concentration of federal civilian or Department of Defense employment. In addition, this forecast round's base employment benefited from closer cooperation with the County's BRAC liaison for current employment information in DOD installations and MWAA's economic impact study report. The cumulative result of these changes was a calculated employment base greater than had been estimated before.



DEPARTMENT OF COMMUNITY PLANNING, HOUSING AND DEVELOPMENT  
Planning Division

#1 Courthouse Plaza, 2100 Clarendon Boulevard, Suite 700, Arlington, VA 22201  
TEL 703.228.3525 FAX 703.228.3543 www.arlingtonva.us

The Round 8.1 employment forecasts for 2015 to 2040 incorporate assumptions new to this round. Chief among these are the use of a 200 sq. ft. of office space per one (1) employee standard, previously this had been 250 sq. ft.; updated office vacancy rates from CoStar by Metro Station Area that are held steady throughout the forecast years, these were mostly lower than had been assumed in previously rounds; the use of a lower retail vacancy rate of 6%; and the improvement of forecast model formulas that correct for negative sums at the Census block-level and that round figures at every step of the forecasting process. The cumulative effect of some of these changes--new office space factor that allows for more employees per sq. ft. of space, lower retail and office vacancy rates, and the use of rounding and a correction of net-negative sums in the formulas—are an increase in forecasted employment. Indeed, forecasted employment in 2040 now exceeds 300,000 jobs. The employment to household ratio in 2040 is now 2.6 and more reflective of a close-in urban center, such as the District of Columbia that had a similar 2040 ratio of 2.9 in Round 8.0.

Lastly, Round 8.1 includes changes to the assumed nature and/or phasing of future development in all Metro Station Areas, but most especially in Columbia Pike and Crystal City. The Columbia Pike assumptions now include changes to its redevelopment timeline and are more skewed toward residential development over commercial construction. Meanwhile, Crystal City redevelopment phasing is more moderated than had been in Round 8.0.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert Brosnan".

Robert Brosnan

Director,

Community, Planning, Housing and Development (CPHD)  
Arlington County



**Round 8.1 Forecasts**

	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>2025</b>	<b>2030</b>	<b>2035</b>	<b>2040</b>	<b>Change 2005-2040</b>	<b>% Change 2005-2040</b>
Total Population	207,600	222,700	233,400	241,900	246,500	248,700	252,400	44,800	21.6%
Households	98,100	105,600	111,200	114,800	116,800	117,800	119,800	21,700	22.1%
Employment	223,300	247,100	275,900	291,600	302,600	305,500	308,400	85,100	38.1%



## City of Fairfax

10455 Armstrong Street  
Fairfax, Virginia 22030-3630

December 7, 2011

Paul DesJardin  
Director, Community Planning and Services  
Metropolitan Washington Council of Governments  
777 N. Capitol St., NE, Suite 300  
Washington, DC 20002-4290

Dear Mr. DesJardin:

Attached please find the City of Fairfax's forecasts for population, households and employment for the period 2010 to 2040. These forecasts comply with the requirements of the Cooperative Forecasting and Data Subcommittee's Round 8.1 forecasts.

The short-term forecasts (up to 2020) for population and employment growth are based on projects recently completed or under construction, as well as anticipated development for longer-range periods. Longer-term forecasts are based on anticipated growth trends.

Population and household figures are based on the 2010 Census, with an adjustment made for what appears to be missed housing units. Employment figures are based on Virginia Employment Commission statistics for 2010, with an added factor for the self-employed.

These forecasts cover the City of Fairfax as a whole; future submittals will be calculated at the Transportation Analysis Zone (TAZ) level, and will be transmitted to the Council of Governments upon completion.

Sincerely,

David Hudson  
Director, Community Development and Planning

enclosure



## Metro. Washington Council of Governments Population Forecasts - City of Fairfax

Year	Population	Households	Employment
2010	22,700	8,400	20,400
2015	23,900	8,800	20,700
2020	24,800	9,200	21,800
2025	25,200	9,300	22,700
2030	25,700	9,500	23,500
2035	26,100	9,600	24,400
2040	26,600	9,800	25,400

*Note: Numbers rounded.*



CITY OF  
**FALLS**  
CHURCH

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January 18, 2012

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 to you the enclosed preliminary Jurisdictional Round 8.1 Cooperative Forecasts for the City of Falls Church, Virginia. Please note that the previous short term forecasts for 2010 are now updated to reflect the city's actual 2010 U. S. Census numbers for population and households. The result was that the city's actual population and households were moderately higher than the previous estimated figures. 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.

The at-place employment forecasts are based upon projected new office, hotel and retail construction using industry standards for job generation rates. The actual at-place employment for 2005 was based upon the use of Dunn and Bradstreet data during the last 8.0 Cooperative Forecasts update. The latest at-place employment data has not yet been reflected in the 2010 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, Principal Planner  
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)

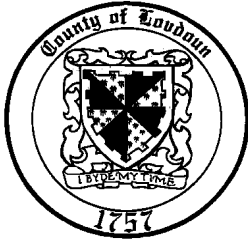
**COG ROUND 8.1 COOPERATIVE FORECASTS  
CITY OF FALLS CHURCH, VA  
January, 2012 (Preliminary)**

**SUMMARY:**

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

**SOURCE:** City of Falls Church, Planning Division

**Note:** At-Place Employment based upon previous industry sources, not 2010 U.S. Census



Loudoun County, Virginia

Department of Planning

1 Harrison Street, S.E., 3<sup>rd</sup> Floor, P.O. Box 7000, MSC #62

Leesburg, VA 20177-7000

Telephone (703) 777-0246 • Fax (703) 777-0441

November 21, 2011

Paul DesJardin, Chief of Housing and Planning  
Department of Human Services, Planning and Public Safety  
Metropolitan Washington Council of Governments  
777 North Capitol Street, NE, Suite 300  
Washington, DC 20002-4290

**Re: Loudoun County's Proposed Round 8.1 Cooperative Forecasts**

Dear Mr. DesJardin:

This letter constitutes Loudoun County's transmittal of its proposed countywide forecasts of population, households, and employment for the Round 8.1 Cooperative Forecasts. These forecasts reflect revisions to the population and household numbers that were part of the Round 8.0 series. At this time, Loudoun County has not revised the employment forecasts from the Round 8.0 series. During the Round 8.1 Traffic Analysis Zone process this fall and winter, Loudoun County may update the 2010 employment base year, if time permits. The forecasted net amount of employment growth for each five year period would remain unchanged.

**Proposed Round 8.1 Cooperative Forecasts of Population, Households and Employment  
Loudoun County, Virginia**

	2010	2015	2020	2025	2030	2035	2040
<b>Population</b>	312,300	352,000	395,300	436,800	458,700	471,600	481,800
<b>Households</b>	104,600	117,500	132,500	146,600	154,500	159,400	163,300
<b>Employment</b>	143,700	167,600	206,500	236,300	257,200	271,500	285,400

The revised population and household forecasts reflect an update to the 2010 base year per the U.S. Census Bureau 2010 Decennial Census. The short term forecasted growth through 2020 has been increased to account for Loudoun County's impact from the recession not lasting as long as previously anticipated. Loudoun County's residential permits for the year-to-date through September are 56 percent higher than last year's activity for the same period. The growth from 2020 to 2040 in housing units permitted is slightly decreased for Round 8.1 to reflect the County's long-run supply of land and land use constraints. The forecasted household

and population growth from 2010 to 2040 has increased for the reasons stated above and due to Loudoun's forecasted household sizes being underestimated in Round 8.0 and the vacancy rates being overestimated in Round 8.0, as determined by an analysis of U.S. Census Bureau Decennial Census data.

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,



Julie Pastor, AICP  
Director, Department of Planning

*cc: Scott K. York, Chairman At-Large, Loudoun County Board of Supervisors and Representative on the MWCOG Metropolitan Development Policy Committee  
Andrea McGimsey, Supervisor, Potomac District, Loudoun County Board of Supervisors and Representative on the MWCOG Board of Directors  
Tim Hemstreet, County Administrator  
Mark Adams, Director, Department of Management and Financial Services  
Ben Mays, Deputy Chief Financial Officer, Department of Management and Financial Services  
Mark Lauzier, Budget Officer, Department of Management and Financial Services  
Beth Hilkemeyer, Research Manager, Department of Management and Financial Services  
Jill Kaneff, Demographer, Department of Management and Financial Services  
Thomas M. Flynn, Director, Department of Economic Development  
Andrew Beacher, Director, Office of Transportation Services*



# CITY OF MANASSAS

## VIRGINIA

9027 Center Street  
Manassas, VA 20110

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

MAYOR  
Harry J. Parrish II

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Jonathan L. Way  
Mark D. Wolfe

CITY MANAGER  
Lawrence D. Hughes

Elizabeth S. Via, AICP, Director  
Office of Community Development

December 8 2011  
Revised January 24, 2012

Greg Goodwin  
Metropolitan Washington Council of Governments  
777 North Capitol Street, NE, Suite 300  
Washington, DC 20002

Dear Mr. Goodwin:

Thank you for this opportunity to provide updated projections for the City of Manassas on households, population, and employment to be incorporated into the Council of Governments Round 8.1 Cooperative Forecasts. The household and population numbers reflect planned and potential rezonings, redevelopment, and other by-right development.

### City of Manassas Round 8.1 Forecasts (December 2011)

	2010	2015	2020	2025	2030	2035	2040	Change 2010 - 2040	% Change 2010 - 2040
Households	12,527	13,061	14,269	15,000	15,731	16,463	17,194	4,667	37.3%
Population	37,821	39,132	40,622	42,112	43,603	45,093	46,583	8,762	23.1%
Employment	23,633	24,712	26,220	27,728	29,235	30,743	32,251	8,618	36.5%

Thank you for incorporating the City of Manassas' projected household, population, and employment data into the Metropolitan Washington Council of Governments' regional forecasts. If you have any questions regarding our estimates, please contact Greg Bokan of this office at 703-257-8225.

Sincerely,

Terry Russell  
Planning and Zoning Services Manager





Melissa S. Peacor  
County Executive

## COUNTY OF PRINCE WILLIAM

OFFICE OF EXECUTIVE MANAGEMENT


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

BOARD OF COUNTY SUPERVISORS

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Pete Candland  
W. S. Wally Covington, III  
John D. Jenkins  
Michael C. May  
Frank J. Principi

January 17, 2012

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

**FROM:** Bill Vaughan   
Chief Economist/County Demographer

**THRU:** Steven Solomon  
Director, Finance Department

**RE:** COG Cooperative Forecasting Round 8.1

Enclosed please find Prince William County's submission of Round 8.1 jurisdiction control totals for population, households, and employment forecasts through 2040. 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 2010 to 2040.

Earlier rounds of household projections were developed in a period of strong growth, which ended with the real estate and economic downturn in the mid-2000's. Round 8.0 used much the same methodology as earlier rounds, but with updated trend data and assumptions that took into account the severe real estate and economic downturn, particularly in the short-term years (2010 and 2015), with more modest projections of household and population growth at the regional and local level. Subsequent years provided projections of more growth, while moderating slightly from earlier Rounds. Round 8.0 was completed prior to the release of 2010 Census data.

Round 8.1 uses much the same methodology, with updated vacancy rates and average household sizes based on the 2010 Census. In general, average household sizes increased from the 2000 Census to the 2010 Census. The average household size in 2000 was 2.95 (for all types); in 2010 the average household size was 3.05. In addition, Round 8.1 adjusts household and population data to reflect official Census data for 2010; subsequent years were adjusted accordingly. The results of the 2010 Census for Prince William County indicate a lower number of households county-wide, but a higher population than Round 8.0's pre-Census estimate for 2010.

Furthermore, Prince William County determined from its build-out analysis and the Prince William County Comprehensive Plan that a different mix of housing is indicated in out-years, resulting in higher numbers of single family and townhomes and lower numbers of multi-family households. As a result, a higher population total is reported for those out-years in Round 8.1 than was reported in Round 8.0. No changes were made to employment projections in Round 8.1

In summary, Round 8.1 adjusts Year 2010 household and population data to reflect 2010 Census data, and uses 2010 Census data to calculate future population. Round 8.1 also considers current conditions with regard to projections in the near-term (2010-2015). Growth has been shifted to out-years (2020-40), providing a more robust outlook during that time period.

#### Attachment

CC: Melisa Peacor, County Executive  
Steven Solomon Director, Finance Dept.  
Christopher Price, Director, Planning Dept.

Allen Scarbrough, Treasury Manager  
Ray Utz, Long Range Planning Chief  
Tom Blaser, Transportation Director  
Francis Burnszynski, Planner III  
David McGettigan, Planner III  
Gregg Steverson, Planner III  
R. Frank Hunt, Data System Analyst  
Grace Maina, Technician II

**Prince William County, Virginia**  
**Households, Population, and Employment Projections, 2010 to 2040**  
**Submission for COG Round 8.1**

<b>Prince William County Round 8.1 Totals</b>							
<b>Households</b>							
<b>Single Family</b>	75,626	81,293	85,313	88,432	90,980	93,134	95,000
<b>Townhouse</b>	34,547	36,984	39,422	41,859	44,296	46,734	49,171
<b>Multi-family</b>	20,612	30,240	39,278	47,511	54,377	59,671	63,409
<b>Total Households</b>	130,785	148,517	164,013	177,802	189,653	199,539	207,580
<b>Population</b>							
<b>Total Population</b>	402,002	452,230	494,534	530,721	561,953	588,358	610,324
<b>Employment</b>							
<b>Industrial</b>	26,959	30,392	33,757	36,587	39,419	42,054	44,552
<b>Retail</b>	34,989	41,631	48,850	55,991	63,870	72,240	81,257
<b>Office/Commercial</b>	32,872	39,850	47,595	55,475	64,297	73,833	84,253
<b>Other</b>	20,590	22,905	25,074	26,748	28,320	29,637	30,734
<b>Total Employment</b>	115,410	134,778	155,276	174,801	195,906	217,764	240,796

*Employment data by type are preliminary and may change subject to COG guidance.*