

MARCH 2003

The Portland region: How are we doing?

Highlights of the region's land-use and transportation performance measures

ith adoption of the 2040 Growth Concept in 1995, the Metro Council unveiled its longterm vision for managing growth in the Portland metropolitan area. The 2040 Growth Concept was incorporated into the Metro Regional Framework Plan. The Framework Plan includes the Regional Urban Growth Goals and Objectives, the 2040 Growth Concept, the Regional Transportation Plan and the Greenspaces Master Plan. The growth concept policies were condensed into eight fundamental values to focus the scope of the performance measures effort and report.

This report is a snapshot of how the Portland region is doing in relation to Metro's growth management goals. In some areas, insufficient data exists to draw defensible conclusions. Therefore, Metro will continue to work to ascertain certain performance measures, including protection of natural resources, conservation of greenbelts between communities, land values and development in town and regional centers.

With adoption of the Urban Growth Management Functional Plan (Functional Plan) in 1996, the Metro Council approved policies to implement the 2040 Growth Concept and committed to monitoring the progress of these policies. In addition to these performance measures requirements, in 1997 the Oregon Legislature established performance measures for Metro. This report represents Metro's first effort to assess its progress and to satisfy state and Metro monitoring requirements.

Metro regional 2040 fundamental values

- Encourage a strong local economy
- Encourage the efficient use of land
- Protect and restore the natural environment
- Maintain separation between the Metro urban growth boundary and neighboring cities
- Provide a balanced transportation system
- Enable communities inside the Metro urban growth boundary to preserve their physical sense of place
- Ensure diverse housing options for all residents
- Create a vibrant place to live and work





Metro People places • open spaces

Clean air and clean water do not stop at city limits or county lines. Neither does the need for jobs, a thriving economy and good transportation choices for people and businesses in our region. Voters have asked Metro to help with the challenges that cross those lines and affect the 24 cities and three counties in the Portland metropolitan area.

A regional approach simply makes sense when it comes to protecting open space, caring for parks, planning for the best use of land, managing garbage disposal and increasing recycling. Metro oversees world-class facilities such as the Oregon Zoo, which contributes to conservation and education, and the Oregon Convention Center, which benefits the region's economy.

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For more information about this report, call the Metro Planning hotline, (503) 797-1888 option 5.

If you don't measure results, you can't tell success from failure.

If you can't see success, you can't reward it.

If you can't see failure, you can't correct it.

Osborne and Gaebler, Reinventing Government, 1992



Encouraging a strong local economy

(For more detail, see Complete Results Report – Fundamental 8)

Commercial, industrial and mixed-use land supply

Recently, land zoned for industrial and commercial activities decreased, while land zoned for mixed-use development increased.

About half of the total vacant industrial land available (buildable) in 2000 (Tier B land)* is limited for development due to physical and market constraints such as infrastructure improvements (roads, sewers, water service), difficult environmental restrictions to overcome, ownership (i.e., lease only), land banking and marine or air restrictions. Note: As of December 2002, the Metro Council expanded the UGB, including an additional 2,851 acres of commercial and industrial land, and referred this to the state Land Conservation and Development Commission for acknowledgment.





Land Supply	1999	2000
Total vacant land zoned industrial (acres)	9,924	9,612
Total vacant land zoned commercial (acres)	2,180	1,929
Total vacant land zoned mixed-use (acres)	5,024	5,256



Amount of vacant buildable industrial land within the UGB – net acres (includes partially developed acres)

Vacant Industrial Land	Less than 1-acre lot	1 to 5	5 to 10	10 to 25	25 to 50	50 to 100	100-plus- acre lot	Total	% Total
Readily developable	53	518	431	484	348	171	89	2,093	32%
Land constrained	67	789	678	760	769	149	_	3,212	49%
Small infill sites	281	264	45	_	-	_	_	590	9%
Suited for redevelopment	31	236	156	99	47	53	_	623	10%
Total	432	1,807	1,309	1,343	1,164	373	89	6,517	100%

*Tier A land is land without major development constraints; Tier B land is constrained by factors described; Tier C is land with infill sites smaller than 1 acre (per property tax assessment records); and Tier D land is considered to be suited for redevelopment.



Land values

Land price data from the Urban Land Institute (Market Profiles) shows the price of industrial land inside the UGB experienced the greatest increase of all land types from 1995 to 1999, followed by land for office parks and land for single-family residential uses.

Typical Vacant Land Price	1995	1999	Percent Change
Single-Family Lots	\$77,700	\$105,167	35%▲
Commerical (Acre) Shopping Center	386,410	414,905	7%▲
Commercial (Square Feet) Office market			
Downtown	85.50	84	2%▼
Suburban high-rise	12	15	25%▲
Office park	7	9.75	39%▲
Industrial (Acre)			
Industrial parks	\$54,450 - \$108,900	\$133,000 - \$190,000	98%▲
Flex or hybrid industrial parks	\$141,570 – \$163,350	\$255,000 - \$440,000	128%▲
ource: ULI (Urban Land Institute) Mai	rket Profiles 2000	▲ = increase	▼ = decrease

Movement of goods

Trucks carry the largest amount of freight to and away from the Portland area than any other mode. Most of the products carried by trucks are wood products and non-metallic mineral products. Rail and marine modes transport primarily cereal grains. Air freight predominantly consists of electronic components and mail while pipelines move gas, fuel and other petroleum and coal products.







Encouraging efficient land use

(For more detail, see Complete Results Report – Fundamental 1)

Residential

Density in established single-family residential neighborhoods remains stable.

One of the chief aspects of the 2040 plan is to protect established singlefamily neighborhoods by focusing new growth in town and regional centers and along transit corridors. Some established single-family neighborhoods have experienced slight increases in density while others have experienced slight decreases. Metro expected existing neighborhoods to accommodate only slightly higher levels of density. The intent of the 2040 plan was to protect the character of established single-family neighborhoods.





Change in neighborhoods: Persons per acre*

Established Neighborhood or Locale (and census tract number)	Persons Per Acre 1990	Persons Per Acre 2000	% Change 1990-2000
Beaverton (312)	10.4	11.7	13%
Gresham (99.01, 100)	5.8	7.5	29%
Hawthorne (13.02)	15.2	14.6	-4%
Hillsboro (324.04)	6.3	7.1	13%
Hillsboro new neighborhood (326.02) 1.9	9.4	395%
Irvington (24.01, 25.01)	14.0	13.5	-4%
NW 23rd Avenue (48)	33.2	37.0	11%
Oak Grove (213, 214)	5.5	5.8	5%
Outer SE Portland – I-205 (6.01, 6.02) 9.5	10.7	13%
Pearl District (51)	4.8	10.7	123%
Sherwood (321.01)	0.7	3.0	329%
Tigard (308.01)	5.6	6.4	14%
West Linn (206)	3.1	4.2	35%

Change in neighborhoods: Single-family dwellings per acre*

Established Neighborhood or Locale Dv (and census tract number)	Single-Family vellings Per Acre 1990	Single-Family Dwellings Per Acre 2000	% Change 1990-2000
Beaverton (312)	5.2	5.3	2%
Gresham (99.01, 100)	2.1	3.0	43%
Hawthorne (13.02)	6.7	6.8	1%
Hillsboro (324.04)	2.1	2.5	19%
Hillsboro new neighborhood (326.	02) 0.7	1.2	71%
Irvington (24.01, 25.01)	5.3	5.4	2%
NW 23rd Avenue (48)	25.2	25.8	2%
Oak Grove (213, 214)	2.2	2.5	14%
Outer SE Portland – I-205 (6.01, 6.	02) 3.7	3.9	5%
Pearl District (51)	2.1	6.8	224%
Sherwood (321.01)	0.3	0.8	167%
Tigard (308.01)	2.3	2.7	17%
West Linn (206)	1.2	1.6	33%

*Representative cross-section of the many communities throughout the Portland metropolitan region





New residential development on vacant land has become more compact. Most of the increased efficiency has been in new multifamily development, with only slight increases in new single-family development. As a result, the region is consuming fewer acres per residential development while accommodating more population inside the UGB.

Year	New Single-Family Density	New Multi-Family Density
1999	5.9 homes per acre	16.4 homes per acre
2000	6.2 homes per acre	21.6 homes per acre
Year	New Residential Land Developed	Population Accommodated
	inside the UGB	inside the UGB
1999	1,468 acres	22,000 people

While growing more than the national average, our metropolitan area's residential density remains similar to other large western metropolitan areas that also experienced more than 30 percent population change between 1982 and 1997 (Los Angeles and San Francisco are excluded because they are significantly larger metropolitan areas compared to others on the West Coast).

Density: comparison of metropolitan regions

Metropolitan Area	Population Change 1982-1997	Urbanized Area Change 1982-1997	Persons Per Acre 1997
San Diego	38%	44%	7.5
Phoenix	73%	42%	7.2
Las Vegas	131%	53%	6.7
Sacramento	46%	50%	5.6
Portland – Vancouver	32%	49%	5.1
Seattle – Tacoma	33%	51%	5.1
Salt Lake City – Ogden	30%	50%	5.0
Denver – Boulder	30%	43%	4.5
U.S. metropolitan average	17%	47%	4.2

Source: The Brookings Institution Center on Urban and Metropolitan Policy, June 2001

Population, households and employment attracted to the region (capture rate)

The Metro UGB attracts a majority of all population, households and employment in the four-county area.

Period	Household	Population	Employment
10-year rate 1980 to 1990	58%	62%	76%
10-year rate 1990 to 2000	73%	69%	73%
20-year rate 1980 to 2000	68%	67%	74%



Employment

Available data show a decrease in commercial jobs accommodated per acre and an increase in industrial jobs accommodated per acre.

Industrial Land and Jobs in UGB	1999	2000
Total developed land in industrial areas (acres)	24,925	24,523
Total industrial jobs	292,859	335,931
Jobs per acre of developed industrial land	11.7	13.7

Commercial Land and Jobs in UGB	1999	2000
Total developed land in commercial areas (acres)	13,994	15,166
Total commercial jobs	453,567	447,762
Jobs per acre of developed commercial land	32.4	29.5

Mixed-use centers

A majority of the region's employment and a portion of the region's population are located in the mixed-use areas and corridors.







Protecting and restoring the natural environment

(For more detail, see Complete Results Report – Fundamental 2)

Natural area protection through acquisition

Metro has exceeded acreage goals for open space acquisition set by the 1995 open spaces bond measure. Both Metro and local governments continue to acquire open spaces with bond measure money and other funds.



Acreage target for 1995 \$135.6 million bond measure	= 6,000 acres
Acreage acquired as of December 2002 (includes 62+ miles of stream banks)	= 7,877 acres
Bond measure money remaining for regional acquisition as of December 2002	= Approximately \$8 million

Natural area protection through regulation

Approximately 13 percent of the land area in the UGB are sensitive natural areas affected by Metro's regional water quality and floodplain protection program (Title 3).

Natural area	a protection – 1998
Wetlands – 7,857 acres (26% of total Title 3 area) Streamside corridors – 9,146 acres (30% of total Title 3 area) Floodplain – 13,502 acres	
(44% of total Title 3 area) Total approximate acreage affected by Title 3 – 30,505 acres	

Waste management

Although the amount of waste recovered per capita has increased from 1995 to 2000, the region did not meet its total recovery goal.

Amount of waste disposed per capita has increased during the last five years.

Waste Recovery	1995	2000	2000 Actual Rate	2000 Goal
Waste recovered (tons)	735,231	970,850	45%	52%
Waste recovered per capita (pounds)	1,120	1,338	n/a	n/a

Waste Disposal	1995	2000
Waste disposed (tons)	995,035	1,207,348
Waste disposed per capita (pounds)	1,520	1,663



Providing Transportation Choices

(For more detail, see Complete Results Report – Fundamental 3)

The updated Regional Transportation Plan (RTP) was adopted in August 2000 and identifies nearly \$8 billion of priority investments to address growth, congestion, serve the regional economy, and maintain clean air and water. The investments cover a range of travel options, and are intended to provide a range of travel choices for the transportation consumer, to move freight efficiently and to minimize the time spent in traffic congestion. Transportation measurements focus on: congestion, travel trends, transportation investment and air quality.

Congestion

According to the Texas Transportation Institute (TTI) of Texas A & M University, traffic congestion continues, and that even if transportation officials "do all the right things, the likely effect is that congestion will continue to grow." In the June 2002 "Urban Mobility Report," TTI researchers conclude that more than road building is needed to stem the tide of growing congestion, although strategic road investments are part of the overall solution. TTI notes that congestion relief strategies also should include high-occupancy vehicle lanes, toll lanes and congestion pricing, more travel options (including investments in transit, biking and walking), managing demand (such as telecommuting, flexible work hours), better land-use planning that results in





shorter trips, increasing the efficiency of the existing system through better traffic management, better construction management and better management of traffic disruptions such as crashes and breakdowns.

Metro's Regional Transportation Plan and local governments have been attacking congestion on all the fronts identified by TTI, but more needs to be done. In particular, the region is falling behind the investment schedule called for in the RTP (see Transportation Investment on page 12). The following indicators provide a preliminary analysis of congestion in the metro area:

Street connectivity

One method to help reduce congestion is to develop a connected street system. A connected street system disperses longer distance trips onto the arterial system that is designed for higher speeds and less access to property. A connected system of local and collector streets can then handle short distance trips and access to property. Recognizing these benefits, all the jurisdictions in the metro region have amended their development codes to require 10 to 16 street connections per linear mile in new developments that construct new streets. (By connecting streets at between 10 to 16 connections per mile, delay on the regional system can be reduced by up to 19 percent and arterial traffic decreased by up to 12 percent. Benefits also accrue to pedestrians and bicyclists who in turn have direct routes to shopping, transit lines or other destinations.)



Freeway traffic

Despite growth in transit ridership and a stable rate of travel per person, suburban freeways continue to experience greater demand due to overall growth in the number of people in the region and, consequently, drivers. In particular, Washington County freeway travel reflects the intense growth in employment and population in the county. Travel along I-205 reflects increasing residential growth in Clark and Clackamas counties.



1997 Volume 2000 Volume I-5 @ Fremont Bridge 0.8% 🔺 I-5 @ Capitol Highway 1.1% 🔺 I-405 @ SW Taylor 1.5% 🔺 I-84 @ 42nd 1.0% 🔺 I-84 East of Sandy River 3.5% 🔺 I-205 @ Airport Way 7.1% 🔺 I-205 @ 82nd Drive 5.0% 🔺 US 26 Sunset Hwy @ Skyline 6.5% 🔺 US 26 Sunset Hwy @ 185th 22.4% Hwy 217 @ Walker Road 11.2% 🔺 Hwy 217 @ I-5 7.7% 🔺 50,000 150,000 200.000 0 100,000 Freeway volumes (both directions)

Source: Oregon Department of Transportation

▼ = decrease

▲ = increase



Travel trends – vehicle miles

There are more people and goods being moved on our transportation facilities than ever before. However, growth in travel on a per capita basis has stabilized after significant growth in the 1980s, and public transit ridership is growing faster than total miles of travel and population. A positive trend in the late 1990s is that travel on a per-person (capita) basis is stabilizing and even showing signs of dropping. This means that people are having to drive fewer miles per day in order to reach employment, shopping, recreational, social and other travel destinations.

Vehicle miles of travel daily – Portland metro area (Oregon only)



Travel trends – transit ridership

Public transportation has been asked to carry more and more of the overall travel load, particularly during the morning and afternoon peak hours and in the most congested corridors. This chart shows that recent investments in transit have resulted in large gains in ridership. Since 1990, ridership on buses and light rail has grown at a rate significantly higher than both the population and vehicle miles of travel.

TriMet ridership 1990-2000 (percent growth)







Average weekday originating rides – bus and MAX

Bus and Rail	1998	2002	% Change 1998-2002
Bus Total	152,400	160,100	5.05%
МАХ			
Eastside MAX	25,000	32,800	31.20%
Westside MAX		24,300	
Airport MAX (Gatewa	y to Airport)	2,300	
MAX Total	25,000	59,400	138.00%
Bus and MAX Total	177,400	219,500	24.00%

Source: TriMet

Transportation Investment

Approximately \$635 million is spent annually on transportation in the metro area on capital, preservation and maintenance. This includes spending for roads, public transportation, bike facilities, sidewalks and miscellaneous other projects. Seventy percent of that total (\$430 million) goes to preserve and maintain the existing system of roads, bridges and other facilities, and to operate the transit system. In order to implement the \$8 billion package of priority projects, the region should be investing \$375 million per year in new capital projects. As can be seen, investments in all modes of travel are lagging.

Average annual regional transportation capital needs and annual capital spending (millions of \$)





Air quality

In 1997, the metro area was granted compliance status with the Federal Clean Air Act Amendments of 1990 for both winter carbon monoxide and summer low-level ozone. Failing to meet clean air standards can result in significant health problems for children, the elderly and those with breathing difficulties. Since 1997, the carbon monoxide standard has not been exceeded. The ozone standard was exceeded three times in 1998 due to high temperatures and lack of controls on marine re-fueling stations. However, the ozone exceedence did not trigger a violation of the Clean Air Act. The standard has not been exceeded since.

A comparison of Portland metro area air quality with other metropolitan regions around the US since adoption of the 2040 Growth Concept shows that, in general, the region has improved its air quality and, as noted, complies with the Clean Air Act standards for carbon monoxide and ozone. The table at the right shows ozone violations of the Clean Air Act. Violation is caused by a combination of heat, vehicle miles of travel, and local wind and topography. The cities are shown merely to provide a perspective on how vastly air quality varies due to these conditions. The Portland metro area's lower vehicle miles of travel and "Clean Air Action Days" have helped reduce the number of violation occurrences despite warm summers.

Air quality: number of days exceeding standard

Year	Carbon Monoxide	Ozone
1996	0	1
1997	0	0
1998	0	3
1999	0	0
2000	0	0
2001	0	0

Air quality: comparison of metropolitan regions: summer days ozone violation of the Clean Air Act





Ensuring diverse housing options

(For more detail, see Complete Results Report – Fundamental 6)





Between 1996 and 2000, most new single-family dwellings inside the urban growth boundary were built on new lots between 5,000 and 7,500 square feet in size. Development on lots larger than 5,000 square feet decreased during the same period.



Metro and local government efforts (after 1996) to provide the opportunity for a greater mix of housing options in the region has not altered the cyclical and market-driven relationship between single-family and multi-family housing. The data shows that single-family residential permits have remained robust and outpaced multi-family permits, in some years by more than 2 to 1.



* Note: The Metro Council adopted the Functional Plan in 1996.







Median family income grew faster in the Portland metropolitan area than the national average from 1990 to 2000. The average household in the area can still afford to purchase a home for more than the median selling price, but affordability is shrinking.

Income, Price, Affordability	1990	2000	Percent Change
Median family income (Portland)	\$ 37,100	\$ 55,900	51%
Median family income (U.S.)	35,700	52,500	47%
Median selling price of a home (Portland)	79,700	166,000	108%
Median selling price of a home (U.S.)	92,000	139,000	51%
House price affordable to median income family (Portland)	129,000	187,000	45%
Affordability Surplus (Portland)*	49,300	21,000	-57%

* Affordability surplus is the difference between the price of a home that a household earning median family income could afford and the median selling price of homes in the region in that year.







Creating vibrant places to live and work

(For more detail, see Complete Results Report – Fundamental 7)

Approximately 28,555 acres of parks and greenspaces and 107 miles of completed regional trials are available to residents of the region. There are approximately 24 acres of parks and greenspaces available for every thousand persons in the metro region.

Approximately 22,021 acres of additional natural areas and greenspaces are in public ownership but have not yet been improved and opened for use by the residents of the region.

The city of Portland has an average amount of parkland per 1,000 residents when compared nationally to other metropolitan areas.

About 64 percent of the region's residents living inside the Metro UGB are within walking distance (¼ mile) of public parks, greenspaces or regional trails.





Jurisdiction	Population	Total Acres	Park Acres per 1,000 People
Austin	596,769	22,699	38.0
Phoenix	1,159,014	33,855	29.2
San Diego	1,218,700	32,650	26.8
Dallas	1,006,877	22,756	22.6
Portland	503,000	9,594	19.1
Houston	1,822,989	20,538	11.3
Oakland	386,086	2,908	7.5
Sacramento	376,243	2,693	7.2
San Antonio	1,115,600	7,390	6.6
Long Beach	421,904	1,942	4.6
Los Angeles	3,553,638	15,574	4.4
Clark Co. (Las Vegas)	1,314,924	5,304	4.0

Source: The Oregonian Oct. 28, 1998. Note: Methodology for compiling data is not known and may vary.





Maintaining separation between the Metro urban growth boundary and neighboring cities

(For more detail, see Complete Results Report – Fundamental 4)

Metro and several nearby cities including Canby and Sandy have existing agreements that prohibit new non-rural development along established "green corridors."

However, recent decisions to expand the region's urban growth boundary have pushed potential development into those "green corridors." In particular, an 86-acre expansion near Sandy and a 12-acre area near Canby are within the borders of the "green corridors."

The City of Gresham requested the UGB expansion arguing the need for transportation circulation improvements and land for industrial development. Gresham, which will likely govern the new urbanized area, has stated its intention to create "green corridors" along U.S. 26 and to plant trees in the highway right of way adjacent to new urban development. Gresham also wants to be a party to the intergovernmental agreement governing such corridors.





Basic Statistics of the Metro Region

Jurisdictions within the Metro boundary Cities Counties (Clackamas, Multhomah, Washington)	24
Special service and school districts	130
Land area (2001 Metro data) Metro urban growth boundary ¹	368.6 square miles 235,904 acres 954.67 square kilometers
Population (2000 Census data) Metro urban growth boundary Metro boundary Three-county area (Clackamas, Multnomah, Washington) Four-county areas (Clark, Clackamas, Multnomah, Washington) Clackamas County in metro area Multnomah County in metro area Washington County in metro area	1,281,470 1,305,574 1,444,219 1,789,457 236,349 654,202 415,023
Households (2000 Census data) Clackamas County total Average household size ² Average family size ³	128,201 2.62 3.07
Multnomah County total Average household size Average family size	272,098 2.37 3.03
Washington County total Average household size Average family size	169,162 2.61 3.14
Housing units (2000 Census data) Clackamas County Multnomah County Washington County	136,954 288,561 178,913
Median family income (2001 HUD Data) Metro region	\$52,500
Per capita income (1999 Bureau of Economic Analysis data – Federal Department of Commerce) Clackamas County Multnomah County Washington County Oregon total Portland/Vancouver (PMSA)	\$32,237 \$32,095 \$31,537 \$26,958 \$30,672
Vehicles registered (2000 Oregon Department of Motor Vehicle data) Clackamas County Multnomah County Washington County	354,035 641,426 393,099
Transportation Daily bus boarding rides (2000 TriMet Data) Daily bus originating rides (") Daily MAX boarding rides (") Daily MAX originating rides (")	206,200 158,000 68,300 61,000
Daily vehicles miles of travel per capita for Portland side of the metro area (in miles traveled daily per person) (2000 ODOT data)	20.0
Miles of bike lanes (2002 Metro data)	512
Regional facilities (2000 Metro and MERC Data) Annual attendance Expo Center Oregon Convention Center Portland Center for the Performing Arts Oregon Zoo	602,600 580,835 946,770 1,328,761

¹ As of Dec. 12, 2002, the Metro Council expanded the UGB by 18,638 acres and referred this to the state Land Conservation and Development Commission for acknowledgment.

Average household size is calculated by dividing the persons in all households by the number of occupied households in the region. Persons in the occupied households may not be related. Average family size is calculated by dividing the persons in all families by the number of families in the region. Persons in the family are related by marriage, birth and adoption. 2

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Project Oversight and Support

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Descriptions of Performance Measures Reports

Complete Results

The Complete Results report contains a thorough explanation of the process that Metro followed to complete this first report. The report provides a context for Metro's performance measures work and contains information on Metro and state performance measure requirements in addition to detailing the process for identifying and prioritizing the performance indicators, and collecting data. Most importantly, the Complete Results includes an analysis of the data collected for each performance indicator and explains the regional policies the indicators were intended to measure.

Summary of Results

The Summary of Results report presents a sampling of the most noteworthy indicators measured in the Complete Results and includes where possible, comparison data collected from other parts of the country, and comparison of the results with Metro targets or goals. The Summary of Results attempts to provide a policy context for interpreting the results of groups of indicators. Additionally, the Summary of Results contains basic statistics for the metro region that are not found in the Complete Results.

The Portland Region: How are we doing? Highlights of the region's land-use and transportation performance measures

This report is a citizen-friendly overview of the key findings generated in the analysis of the region's growth management policies. The information presented in this "snapshot" format is derived from the content of the Complete Results and Summary of Results reports. Some comparison data are included in this report.





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