

Agenda



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Meeting: Joint Transportation Policy Alternatives Committee (TPAC) and Metro Technical Advisory Committee (MTAC) Workshop
Date: Wednesday, February 7, 2018
Time: 9:30 a.m. – noon
Place: Metro Regional Center, Council Chamber

- | | | | |
|-----------------|-------------|---|--|
| 9:30 am | 1. | Call To Order And Introductions | Tom Kloster, Chair |
| 9:35 am | 2. | Comments From The Chair And Committee Members | Tom Kloster, Chair |
| 9:40 am | 3. | Public Communications On Agenda Items | |
| 9:45 am | 4. # | Regional Travel Options (RTO) Travel and Awareness Survey Results
Purpose: Metro staff and DHM Research will present results from the RTO Travel and Awareness Survey. The survey provides insight into current regional trends in transportation choices, examines willingness of drivers to start using sustainable travel modes, and focuses RTO program efforts that will work for people and maximize results. | Michelle Neiss, PhD
Anne Buzzini
DHM Research

Caleb Winter, Metro
Kale Mattias, Metro |
| 11:00 am | 5. * | 2018 Growth Management Decision: Population and Employment Range Forecast
Purpose: This is an informational briefing to familiarize the committee members with the region's 2018 Urban Growth Management (UGM process) and key findings from the latest regional population and employment forecast. Subsequent briefings will keep the committees apprised of future steps in the UGM process. | Ted Reid, Metro
Jeff Frkonja, Metro |
| 12:00 pm | 6. | Adjourn | Tom Kloster, Metro |

Upcoming TPAC/MTAC Workshop Meetings:

- Wednesday, March 7, 2018
TPAC/MTAC Workshop, 9:30 a.m. – noon
- Wednesday, April 4, 2018
TPAC/MTAC Workshop, 9:30 a.m. - noon

- * Material will be emailed with meeting notice
- # Material will be distributed at the meeting.

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2018 Joint TPAC/MTAC Workshop Work Program

As of 1/30/18

NOTE: Items in italics are tentative

<p><u>February 7, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • Regional Travel Options (RTO) Travel and Awareness Survey Results (Michelle Neiss, PhD and Anne Buzzini, DHM Research/ Caleb Winter and Kale Mattias, Metro; 75 min) • 2018 Growth Management Decision: Population and Employment Range Forecast (Ted Reid and Jeff Frkonja; 60 min) <p><u>Regional Leadership Forum #4: March 2, 2018</u> <u>8:30 a.m. to noon, Oregon Convention Center</u></p>	<p><u>March 7, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • 2018 Growth Management Decision: Buildable Land Estimates (Reid/Frkonja; 45 min) • Congestion Management Program finding for Transportation Improvement Program (Cho; 45 min) • Project Evaluation Criteria Refinement (Ellis; 45 min) • Portland Metro Area Value Pricing Update (Judith Gray, ODOT; 30 min) • Technical Review Draft of Transit Strategy (Snook; 45 min)
<p><u>April 4, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • Map-21 Performance Monitoring, Target Setting and Reporting (Mermin; 45 min) • Transportation Resiliency and Emerging Routes (Ellis; 45 min) • Technical Review Draft RTP (Ellis; 45 min) 	<p><u>May 2, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • 2018 Growth Management Decision: Urban Reserve Goal 14 Analysis (Reid/O'Brien; 30 min) • Regional Travel Options Funding Methodology (Kaempff; 45 min)
<p><u>June 6, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • 2021-2024 State Transportation Improvement Program (STIP) 150% Fix-It Lists Overview and Discussion (Cho/Leybold; 45 min) • 2018 Growth Management Decision: City Proposals for Urban Growth Boundaries (UGB) Expansions (Reid/5 City Reps; 2.5 hours) • 2022-2024 Regional Flexible Funds Allocation kickoff (Kaempff; 30 min) • Preliminary Draft RTP (Ellis, 45 min) 	<p><u>July 11, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • 2018 Growth Management Decision: Overview of Draft 2018 Urban Growth Report (Frkonja; 60 min) • 2018 Growth Management Decision: Urban Reserves Alternatives Analysis (Reid/O'Brien; 30 min)

2018 Joint TPAC/MTAC Workshop Work Program

As of 1/30/18

NOTE: Items in italics are tentative

<p><u>August 1, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • <p>Agenda Items:</p> <ul style="list-style-type: none"> • 2021-2024 State Transportation Improvement Program (STIP) 150% ARTS List (Cho/Leybold; 45 min) • Public review draft RTP and Framing Policy Issues Discussion (Ellis; 45 min) 	<p><u>September 5, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> •
<p><u>October 3, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • 	<p><u>November 7, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> •
<p><u>December 5, 2018</u> Comments from the Chair:</p> <ul style="list-style-type: none"> • 	<p><u>January 2, 2019</u> Comments from the Chair:</p> <ul style="list-style-type: none"> •

Parking Lot

- HB2017 Electric Vehicle Rebate
- DEQ-PSU Diesel Monitoring Project

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Meeting minutes

Meeting: Joint Transportation Policy Alternatives Committee (TPAC) and
Metro Technical Advisory Committee (MTAC) Workshop

Date/time: Wednesday, Jan. 3, 2018 | 9:30 a.m. - noon

Place: Metro Regional Center, Council chamber

Attending

Tom Kloster, Chair
Adam Barber
Jennifer Donnelly
Katherine Kelly
Brendon Haggerty
Chris Damgen
Glenn Koehrsen
Raymond Eck
Darci Rudzinski
Mary Kyle McCurdy
Tom Bouillion
Lynne Mutrre
Gerry Mildner
Ramsay Weit
Jessica Berry
Cory Ann Wind
Dan Chandler
Don Odermott
Carol Chesarek
Laura Weigel
Jae Douglas
Laura Terway
Beverly Drottar
Joanna Valencia
Bob Kellett
Emily Lai
Paul Grove
Hannah Day-Kapell
Tom Armstrong
Karen Perl Fox
Nancy Kraushaar
Chris Deffebach
Jon Makler
Eric Hesse
Tyler Bullen

Affiliate

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DLCD
City of Gresham
Multnomah Co. Health Department
City of Troutdale
TPAC Community Member
Washington Co. Community Member
Angelo Planning
1000 Friends of Oregon
Port of Portland
Community Member
Portland State University
AHS, Housing Affordability
Multnomah County
Oregon Department of Environmental Quality
Clackamas County
City of Hillsboro
Multnomah County
City of Hillsboro
Multnomah County Public Health
City of Oregon City
TPAC Community Member
Multnomah County
Portland Bureau of Transportation
TPAC Community Member
Portland Home Builders Association
Alta Planning and Design
City of Portland
City of Tualatin
City of Wilsonville
Washington County
Oregon Department of Transportation
TriMet
TPAC Community Member

Metro Staff

Ted Leybold, Resource Development Manager	Jamie Snook, Principal Transportation Planner
Ken Lobeck, Funding Programs Lead	Lake McTighe, Senior Transportation Planner
Ted Reid, Principal Regional Planner	Grace Cho, Associate Transportation Planner

Margi Bradway, Deputy Dir. Planning & Dev.
Eliot Rose, Technology Strategist
Paulette Copperstone, Program Asst. III

Daniel Daempff, Principal Transportation Planner
Tim Collins, Senior Transportation Planner
Marie Miller, TPAC Recorder

1. Call to Order and Introductions

Chair Tom Kloster called the workshop meeting to order at 9:30 a.m., and welcomed everyone. Chair Kloster provided an overview of the function and flow of the planned workshops this year. With interest from attendees, Chair Kloster agreed to have workshop agenda and packet materials sent the week in advance when possible. Introductions were made by TPAC and MTAC members, alternates, staff and guests attending the meeting.

2. Comments From the Chair and Committee Members

- **Letters of Interest Received from Cities for Urban Growth Boundaries (UGB) expansions (Ted Reid)** Mr. Reid provided a brief update on the letters of interest that were submitted by cities for the 2018 urban growth management decision. Five cities were heard from: Beaverton, Hillsboro, Wilsonville, King City and Sherwood. Total gross acreage for these proposals was about 2,500 for mostly residential uses, for a total of about 14,000 housing units. More details about the city proposals will be provided once these cities submit full proposals by a May 31 deadline.

MTAC and TPAC members asked several questions. In response, Mr. Reid noted that:

- The number of planned housing units in the proposed expansions was determined by the cities themselves.
 - Some neighborhood commercial uses are contemplated by cities proposing expansions, but the proposals are primarily for residential uses.
 - No new schools are planned in the proposed expansion areas, but the Sherwood proposal is for an area next to a school site (to be built) that was recently added to the UGB.
- **Upcoming TPAC/MTAC Workshop Topics on Growth Management (Ted Reid)** Mr. Reid referred to the 2018 Combined TPAC/MTAC Workshop Work Program for planned agenda items related to Urban Growth Management, including updates on the technical work that is being conducted to inform decision making.
 - **Urbanism Next Conference, March 5-7 (Lake McTighe)**
 - **Oregon Active Transportation Summit, March 15-16 (Lake McTighe)** Ms. McTighe announced that two conferences of interest were planned for March 2018. Registration was open, and encouragement was given for participation.
<https://urbanismnext.uoregon.edu/conference/>
<https://www.thestreettrust.org/2018-active-transportation-summit/>

3. Citizen Communications on Agenda Items – None

- **Draft Regional Emerging Technology Strategies RTX** Mr. Rose presented a program on the Emerging Technology Strategy with the goal of refining policy language.

Prior to the workshop a survey was provided with 14 responses given. It was noted a better definition of terms on the survey would have helped people provide input. The responses showed technology is a hot topic, and one in which we are still learning. The majority of respondents are somewhat optimistic about emerging technologies, and are particularly focused on automated, connected, and electric vehicles. Congestion (and pricing it), fiscal stewardship, safety, transportation choices, and equity are areas where partners feel both optimism and concern regarding emerging technologies.

Mr. Rose reported on near-term trends in technology. These include shared AVs on streets and people using transportation network companies (TNCs) more, as well as increased congestion and inequity unless public agencies take a role in ensuring that new technologies complement existing options and meet the needs of historically marginalized communities. Within 20-30 years, most vehicles on the road will be AVs and EVs, which will impact congestion, emissions, economic prosperity, transportation revenues, and safety.

Mr. Rose provided the committee with the Technology Strategy policy framework, starting with principles (apply to public agencies and private transportation companies, outlining a long-term vision for achieving our 11 regional goals), to policies and strategies (apply to public agencies with the focus on key areas where we need to act in the next decade), and actions (apply to Metro with critical steps needed in the next two years to support our policies in the midst of major changes).

A breakout session was held to collect input on draft technology principles. Following the group breakout, comments were given:

- Reducing congestion--should we set goals and expectations?
- Specifically, what defines net increases in jobs in the region?
- Regarding equity issues, definitions are needed for access to technology, participation in transportation and land use issues, and vehicle access
- Accountability extends to private companies
- Safety and security needs to include personal security
- Added bullet for resiliency and redundancy in safety
- The Strategy should be both a stand-alone document and included in the RTP
- What new methods will we have for collecting transportation revenues in the future?
- Are there ways to encourage technology to address equity, or are we boxing ourselves in with current language?
- Better designs are needed for safe transportation facilities
- New bullet, New technology enables accurate pricing to apply support of transportation and land use goals
- Equity language should address displacement
- Collaboration between private companies and public agencies on transportation and land use issues.
- Education needs to be addressed, better retraining for those being displaced.

Mr. Rose concluded the presentation with an overview of key policy areas that emerging technology will address; Transportation choices, Equity, Economic prosperity, Data and Innovation. It was suggested to add a sixth area to cover the human element for opportunity, as well as elements addressing climate change and land use. The survey link will be sent out again to the committee for further input, due to Mr. Rose before March. A short report will be given at the next workshop.

5. Draft Regional Travel Options (RTO) Strategy for Public Comment Dan Kaempff introduced the initial draft 2018 Regional Travel Options Strategy. The collective regional effort with many RTO partners helps to get people to use their vehicles less, and use transit, Active Transportation and carpooling more. Funding from the Regional Flexible Funds Allocation (RFFA) and Oregon Department of Transportation (ODOT) provides \$3.3 million annual to the program.

The draft 2018 RTO Strategy supports and carries out regional policy direction found in the Regional Transportation Plan, Climate Smart Strategy (CCS), and the Regional Flexible Funds Policy. The Strategy

continues the program's goals of reducing auto trips for commute and non-commute purposes, increasing the regional reach of the program by creating additional program partners, ensuring that investments are made with equity as a top consideration, and to develop a regional Safe Routes to School (SRTS) program.

Hannah Day-Kapell of Alta Planning & Design, the contractor working on the RTO Strategy, reported on how data and input was gathered on the program. Reviews, discussions, workshops and peer interviews were held between summer and early fall, 2017. Strategic directions identified were tactical investments in successful programs, more support to begin and grow new efforts, and simplify the funding process with easier use of the grants program.

The Strategy is centered on four goals:

1. Reduce Vehicle Miles Traveled
2. Expand the RTO Program to effectively reach existing and new audiences
3. Implement a Regional Safe Routes to School Program
4. Measure program, evaluate impacts, and continually improve the program

Discussion followed. It was pointed out that the Strategy was focused on setting a direction for the program for the next 10 years, and that a specific funding allocation methodology would be based on policy adopted through the Strategy. Regarding why SRTS was called out specifically as the only program listed, Mr. Kaempff explained that specific policy direction from JPACT and the Metro Council required this.

A question was raised as to how the Strategy addressed the needs of an aging population and the resulting impact on transportation. The Strategy includes elderly as a particular group of residents needing RTO programs. Other questions included how partners with the program were contacted, given presentations and provided opportunity to participate.

It was suggested that reaching goals to increase audiences would be more successful to local schools; that the current strategy doesn't fit for a regional basis. A question was raised on why reducing vehicle miles traveled was a regional goal for RTO. It was suggested that Goal 1 be broadened to address more direct workforce access transit that could help workers find travel options or to reflect other regional livability outcomes.

A map was shown on potential for reducing Vehicle Miles Traveled (VMT). It was suggested to include more geographic scope definition in the areas. Goal 2 for expanding programs to reach existing and new audiences was highlighted with a request to use more common language in outreach. To gain meaningful participation, communities need to understand why this program helps them and how their participation would be beneficial in their communities.

Recommendations for the 2018 Strategy are to reduce the competitive grant program with more local and SRTS implementation funding, with a longer grant cycle of 3 years compared to the current 2 years. It would also increase evaluation, marketing and planning support slightly and support innovation in programs where priorities with the plan center on equity and SRTS.

On page 3 of the 2018 RTO draft, the mode share chart was confusing, as it appears not to match the context of regional shifts in travel modes. More explanation of these numbers needs to be completed. Next steps with the adoption schedule were shared. The committee was asked to review the document and share future comments with Mr. Kaempff.

- 6. Draft Regional Freight Plan Preview** Tim Collins presented information on the updated Regional Freight Strategy currently being drafted. The Table of Contents showed highlighted text that either denotes significant revisions from the 2010 freight plan, or new sections. The Regional Freight Strategy has set six regional freight policies aligned with the RTP. In addition, a seventh policy was added by recommendation of Metro Council, addressing freight policy for safety.

Mr. Collins briefly reviewed the Regional Freight Network Concept and how policies help guide investments in the multimodal regional freight network. A new Regional Freight Network Map has been created showing freight facilities, main freight roadways and intermodal connectors. The freight action plan is tied to implementing each of the seven freight policies. This list has been updated and focused on achievable near-term actions, and a few long-term actions.

The RTP Freight projects are a subset of the 2040 RTP projects submitted in round 1 of the RTP Call for Projects. Projects under “Roads and Bridges” must have a regional freight element. The 2040 RTP Freight Projects and Programs, attachment 3, shows totals for the estimated costs of Financially Constrained and Strategic RTP Freight Projects and Programs. TPAC and MTAC will continue to be updated on the Regional Freight Plan Strategy as more is developed.

7. Adjourn

There being no further business, workshop meeting was adjourned by Chair Kloster at 12:00 p.m.
Meeting minutes submitted by,
Marie Miller
TPAC Recorder

Attachments to the Public Record, TPAC and MTAC Workshop meeting, January 3, 2018

Item	DOCUMENT TYPE	DOCUMENT DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
1	Agenda	1/3/2018	Jan. 3, 2018 Joint TPAC/MTAC Workshop Agenda	010318T-01
2	Work Program	12/28/17	2018 Combined TPAC/MTAC Workshop Work Program	010318T-02
3	Meeting Schedule	1/3/2018	2018 Joint TPAC and MTAC Meeting Schedule	010318T-03
4	Memo	1/3/2018	Staff Report from Eliot Rose, Technology Strategist Re: Emerging Technology Strategy, Policy Development	010318T-04
5	Handout	1/3/2018	Survey on Technology and regional goals and policies	010318T-05
6	Memo	12/22/2017	Staff Report from Dan Kaempff, Principal Transportation Planner Re: Draft 2018 Regional Travel Options Strategy	010318T-06
7	2018 Regional Travel Options Strategy, Draft	12/2017	2018 Regional Travel Options Strategy; Draft for public comment	010318T-07
8	Memo	1/2/2018	Staff Report from Tim Collins, Senior Transportation Planner Re: Overview of technical review draft 2018 Regional Freight Strategy	010318T-08
9	Attachment 1	12/27/2017	Regional Freight Work Group Members	010318T-09
10	Handout	12/29/2017	2018 Regional Freight Strategy, Draft Table of Contents	010318T-10
11	Attachment 2	12/19/2017	Draft Regional Freight Network Map	010318T-11
12	Attachment 3	12/29/2017	2040 RTP Freight Projects and Programs (final draft)	010318T-12
13	Presentation	1/3/2018	Emerging Technology Strategy: Policy Development Workshop	010318T-13
14	Presentation	1/3/2018	2018 Draft Regional Travel Options Strategy	010318T-14
15	Presentation	1/3/2018	Regional Freight Strategy Update	010318T-15

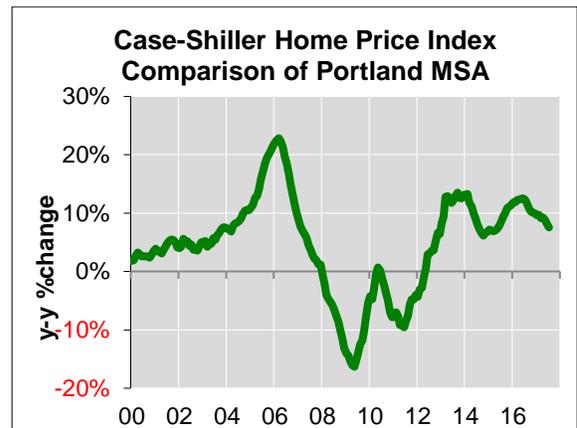
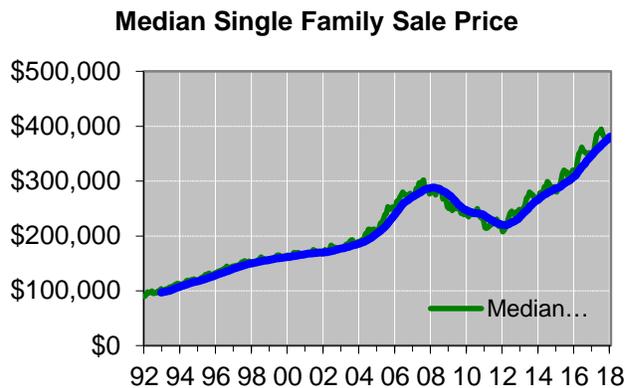
This document summarizes the Metro 2018-2038 Regional Growth Draft Forecast. It provides high-level talking points and forecast outputs for general audiences.

Key Findings

- A panel of experts, economists, and demographers found the forecast to be reasonably sound.
- The Metro region has rebounded from the Great Recession.
- The region added 45,000 new residents last year (2016), equal to 1.9% APR. This is the fastest annual growth since the Great Recession.
- The tight labor market is leading to a Portland area unemployment rate below 4 percent (December 2017). Job growth has been robust since 2014.
- Strong regional growth has lifted employment back above the pre-recession employment peak.
- Going forward, both population and job growth are expected to continue at a moderated pace because the region is approaching its full potential and full employment.
- Longer-term, the region will continue to see relatively stronger population growth (than U.S. trends) as net in-migration is expected to add to regional population – averaging 1.0% APR, (784,000 more residents in MSA between 2015 and 2045)
- Job growth in the long-term is expected to trend with population, – averaging roughly the same 1.0% APR, (406,000 more jobs in MSA between 2015 and 2045)

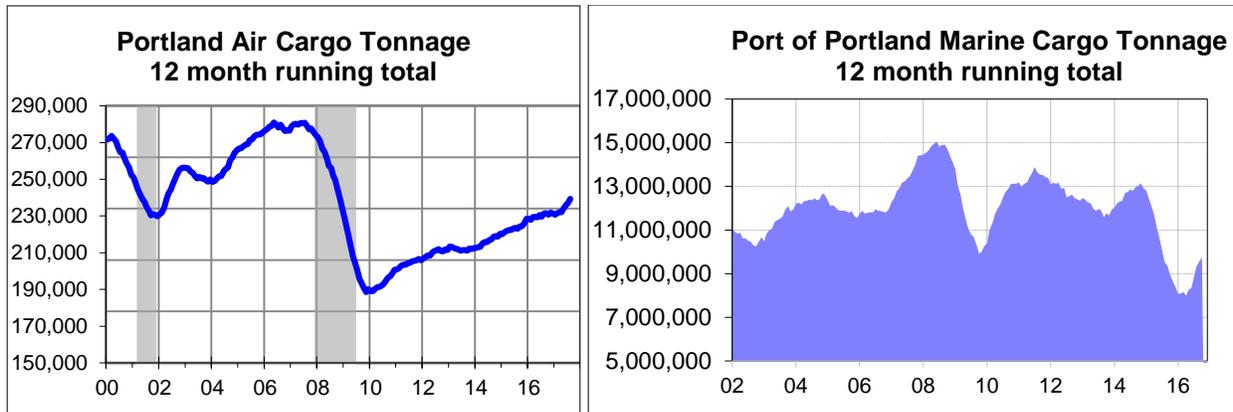
State of the Region

- ❖ Strong real estate prices (charts below) indicate a growing economy with room to expand a key blue-collar employment sector – construction. Surveys of local apartments show low vacancy rates and higher year-over-year rents.



Sources: Regional Multiple Listing Service, Case-Schiller

- ❖ Cargo shipments (charts below) through the Port of Portland indicate a prosperous, growing region. Air cargo is ramping up to activity levels before the recession. Marine cargo (especially through Terminal 6) has not performed to expectations due to labor issues although it shows a capacity to rebound and contribute to regional job growth.



Source: Port of Portland

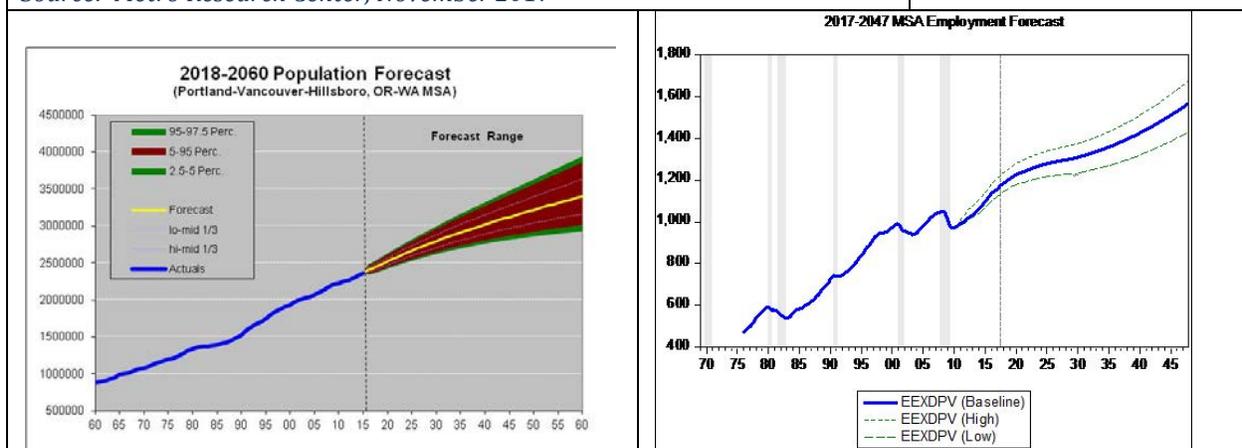
Regional Draft Forecast Summary

- ❖ Forecast prepared using up-to-date Census and Portland State Population Research Center data
- ❖ Forecast data sources include U.S. Bureau of Labor Statistics, Bureau of Economics, Federal Reserve Board, and Census
- ❖ U.S. growth projections derived from IHS Markit (August 2017 edition) and U.S. Census
- ❖ Annual comparisons between past forecasts and actuals/estimates are accurate and within an error band of about +/- 1 percent compounded, excluding years for the Great Recession
- ❖ Forecast contains uncertainty (see charts below).

2018-38 Regional Forecast, Portland-Vancouver-Hillsboro, OR-WA Metropolitan Statistical Area

Year	Population	APR%	Employment	APR%
2015	2,362,650	1.6	1,111,900	3.3
2016	2,407,550	1.9	1,144,450	2.9
2017	2,443,900	1.5	1,169,300	2.1
2018	2,480,800	1.5	1,193,500	2.1
2019	2,513,500	1.3	1,214,250	1.7
2020	2,545,650	1.3	1,230,200	1.3
2038	3,005,100	1.0	1,402,400	1.0

Source: Metro Research Center, November 2017



Materials following this page were distributed at the meeting.



Metro

2040 PLANNING AND DEVELOPMENT GRANTS PROGRAM

Everyone in the metro region benefits when all of greater Portland's communities can reach their full potential. 2040 Planning and Development grants help communities implement our region's long-range vision, create new housing and commercial opportunities, revitalize town centers, develop employment areas, reduce barriers to equitable housing and plan for future infrastructure and development in new urban areas. The program, formerly known as the Community Planning and Development Grants (CPDG) Program, has been in place since 2006. Prior grant cycles have awarded over \$22 million to fund more than 90 projects across the region. The grants are funded by a regional excise tax on certain construction projects in greater Portland.

ELIGIBLE APPLICANTS

Local governments (cities and counties) within Metro's service district may submit applications. They may apply as sole applicants, or in partnership with other government entities or private, non-profit or community-based organizations. Other local governments, as defined in ORS 174.116, may apply for a grant in partnership with a city or county within the Metro service district.

Neighboring jurisdictions embarking on similar community planning and development planning projects are encouraged to coordinate or combine their projects. If two or more government entities apply for one grant, one must be lead for the application and only one application for the project should be submitted. Up to 4 project Letters of Intent and 3 full grant applications may be submitted per jurisdiction during the 2018 grant cycle. Metro is not eligible to apply for or receive grant funds.

INVESTMENT TARGETS FOR THE 2018 APPLICATION CYCLE

The Metro Council establishes a policy emphasis for each grant cycle to help align the grant program with current trends and issues affecting development in the region. Presently, the region continues to have a crisis in adequate housing supply, especially for residents with lower incomes. Multiple tools, strategies, and approaches are needed to provide more equitable housing throughout the region. Complementary strategies for employment growth, redevelopment, and land readiness are also important to address other current regional growth and development issues. The policy and investment emphasis for the 2018 grant cycle is as follows:

- 25% of grant funds will be targeted for concept planning or comprehensive planning projects in Urban Reserves or new urban areas
- 50% of allocated funds will be targeted for qualified projects that will facilitate implementation of equitable development projects inside the UGB, which may include but are not limited to:
 - Planning or pre-development work for equitable housing (diverse, physically accessible, affordable housing choices with access to opportunities, services, and amenities);
 - Planning or pre-development work for projects that will advance quality of life outcomes for communities of color, such as quality education, living wage employment, healthy environments, and transportation;

- Facilitation of development-related efforts in partnership with a community organization whose primary mission is to serve communities of color;
 - Planning or pre-development for projects that will serve a specific neighborhood or geography with a high percentage of residents that are people of color;
 - Planning for public and private developments, investments, programs and policies that will be enacted to meet the needs of communities of color and reduce racial disparities, taking into account past history and current conditions.
- 25% of funds will be targeted for projects to facilitate development in centers, corridors, station areas, and employment areas
 - In the event that there are not sufficient strong applications in any target area, grant funds may be allocated to other types of applications.

Metro staff will review applications that seek consideration under the equitable development category; those that do not have a sufficiently strong equitable development emphasis to merit funding in that category will be then be added to the general pool of applications for projects within the UGB, and evaluated alongside those applications based on their relative overall merits.

TIMELINE FOR THE 2018 GRANT APPLICATION CYCLE

Feb. 1, 2018	Metro begins to accept draft Letters of Intent.
Feb. 12 - March 8	Scheduling of required pre-application conferences with Metro staff. Required draft Letter of Intent due to Metro no later than March 8. Early submission of draft Letter of Intent is strongly encouraged.
March 23	Deadline to submit final Letters of Intent.
April 20	Deadline to submit Full Application.
May – June	Staff/screening committee evaluations and recommendations,
July – Aug.	Metro Council action to award grants.
Aug. – Jan. 2019	Negotiation of inter-governmental agreements (IGAs) between Metro and grantees; procurement/selection of project consultant teams; finalization of project scopes, milestones, and timelines.
Feb. 2019	Grant application Cycle 7 to begin.

QUESTIONS? Application information available at oregonmetro.gov/2040grants

Applications and general information	Laura Dawson-Bodner	503-797-1756
Projects inside the urban growth boundary	Lisa Miles	503-797-1877
Projects in urban reserves and new urban areas	Tim O'Brien	503-797-1840



Regional Travel Options TRAVEL & AWARENESS SURVEY 2017

The RTO survey provides insight into current regional trends in transportation choices, examines willingness of drivers to start using sustainable travel modes, and focuses RTO program efforts that will work for people and maximize results. For more, visit oregonmetro.gov/travel-options-research or email caleb.winter@oregonmetro.gov or kale.mattias@oregonmetro.gov.

1. For residents who use ridehailing, how often do they typically use the service?

Daily

Weekly

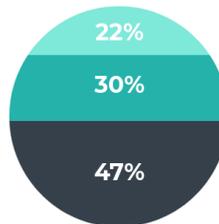
Monthly

Rarely

2. What percentage of residents reported that their commutes are worse than last year?



3. What percentage of residents use active transportation (bike, walk, transit) monthly or more?



4. How many residents reported they are interested in using travel options more than they do currently?



5. If commuters who drive didn't have their car for a day, they would most likely commute by...?



WALK



BIKE



TRANSIT



TAXI
RIDEHAIL



CARPPOOL



CARSHARE



TELE
COMMUTE

Metro RTO Survey

February 2018



Metro

dhm RESEARCH
DAVIS, HIBBITTS & MIDGHALL, INC.
PORTLAND | SEATTLE | WASHINGTON DC

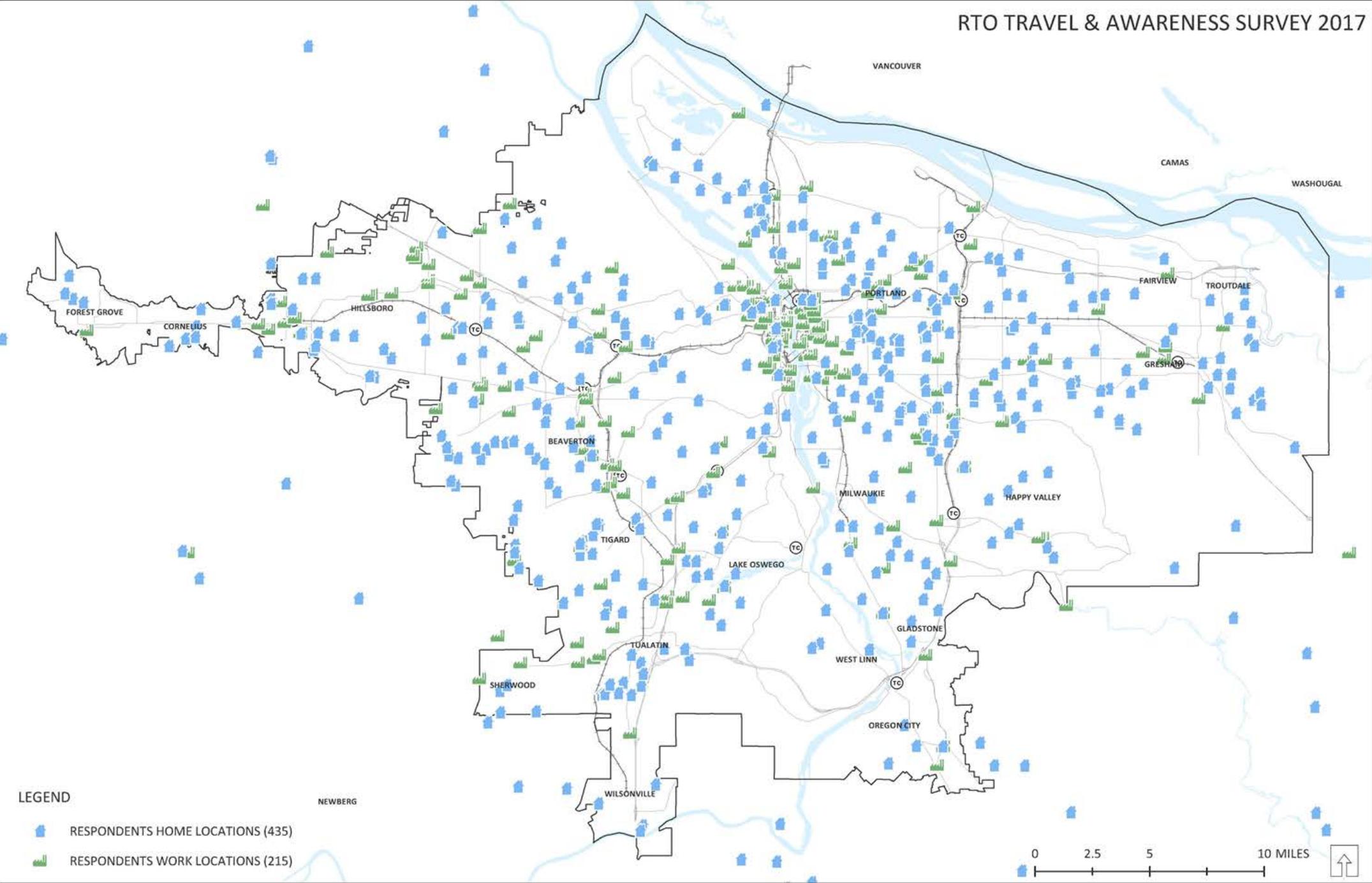
What is the RTO Survey?

- Tracks Metro residents' travel behavior over time, including top modes of transportation and purposes
- Assesses awareness of Metro area programs and services related to multi-modal transportation and transportation safety
- Determines interest in changing travel behavior and tests most effective messages for spurring change

Past RTO Surveys

- 2010, 2012, 2014
 - Focus on Commuter Habits, Carpooling, Messaging
- RTO Strategy 2012-2017
- 2017 Survey
 - New questions on Ridehailing, Smartphone Apps, Combining Trips and Trip Choice
 - 50% Cell Phone Sample

Survey respondents



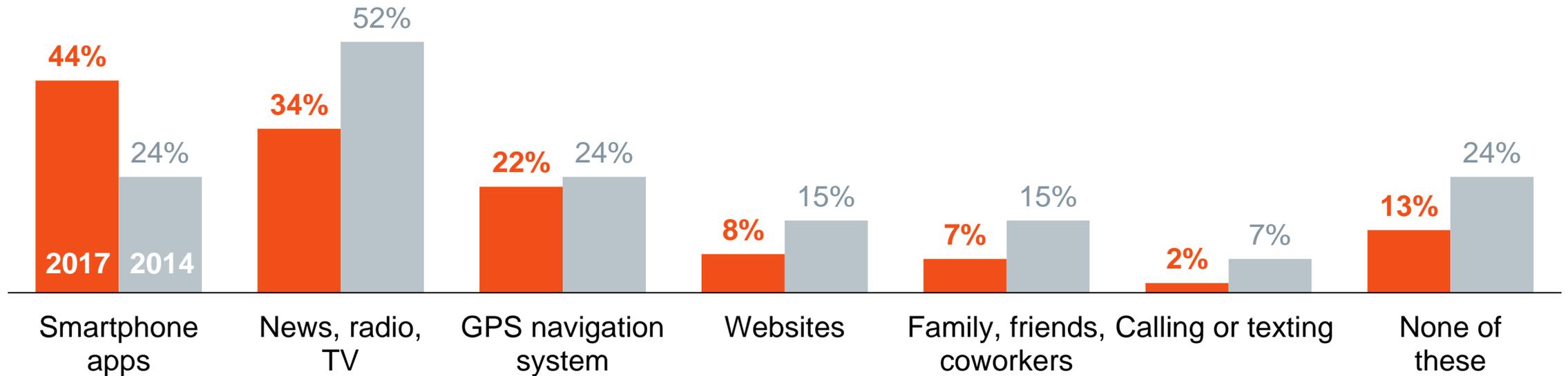
LEGEND

-  RESPONDENTS HOME LOCATIONS (435)
-  RESPONDENTS WORK LOCATIONS (215)

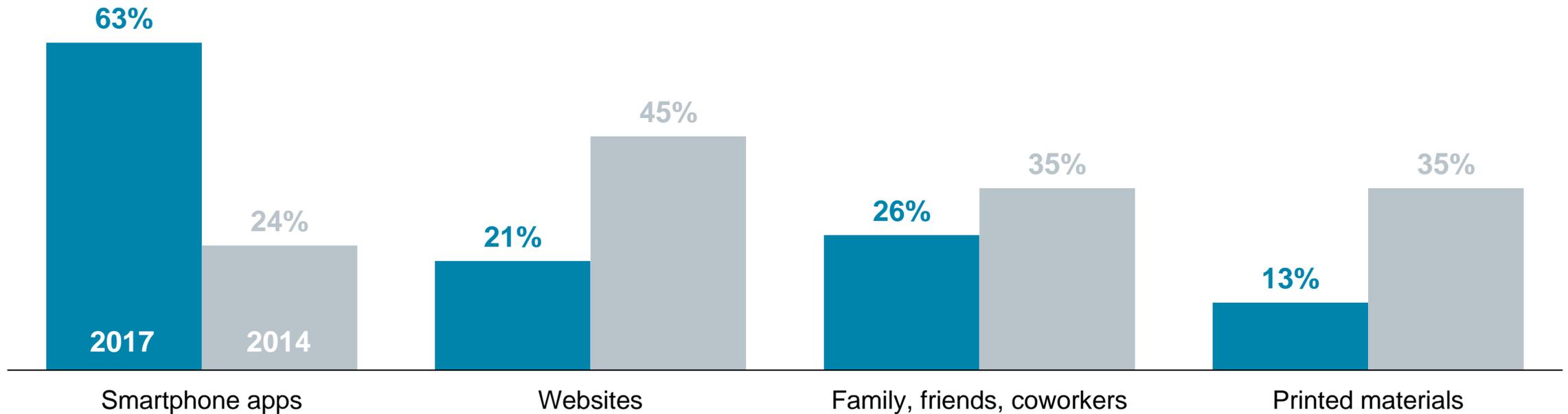


Changes in the region over time

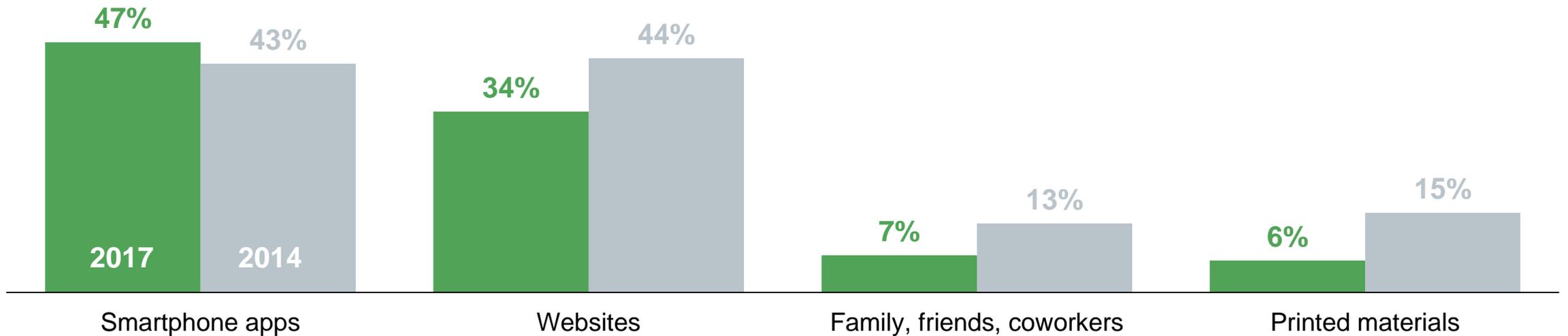
Smartphone apps are now more popular than local news for traffic information for: **drivers.**



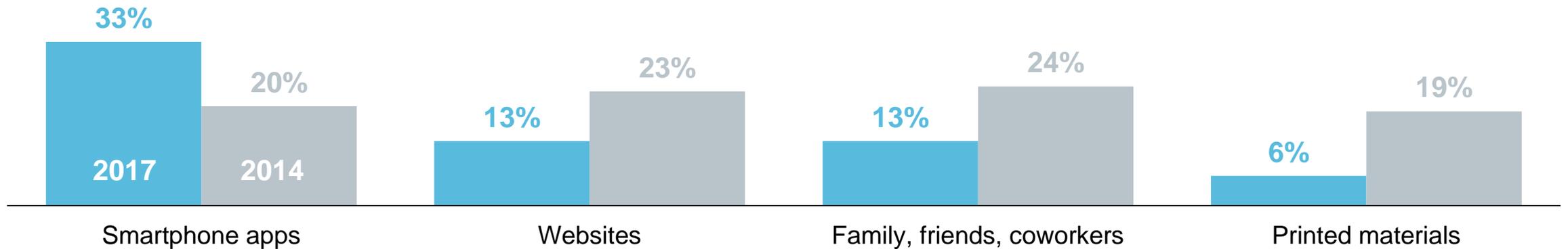
Smartphone apps are now more popular than local news for traffic information for: cyclists.



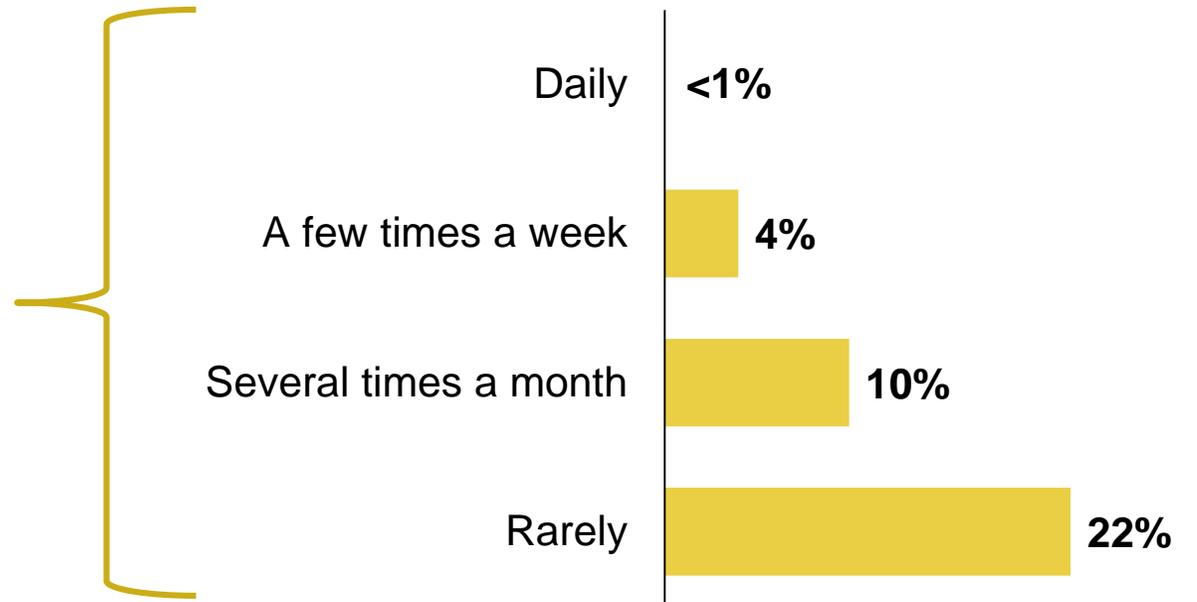
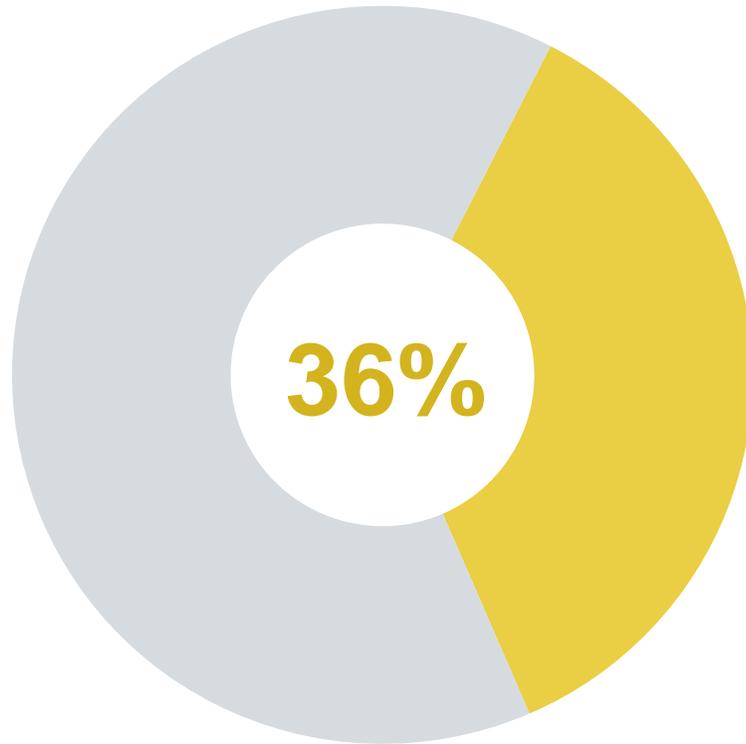
Smartphone apps are now more popular than local news for traffic information for: transit riders.



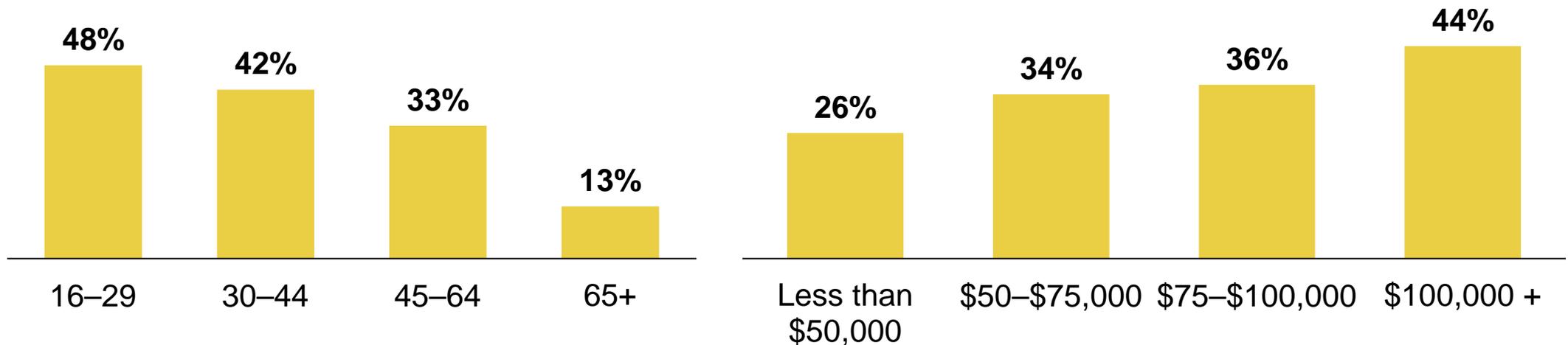
Smartphone apps are now more popular than local news for traffic information for: pedestrians.



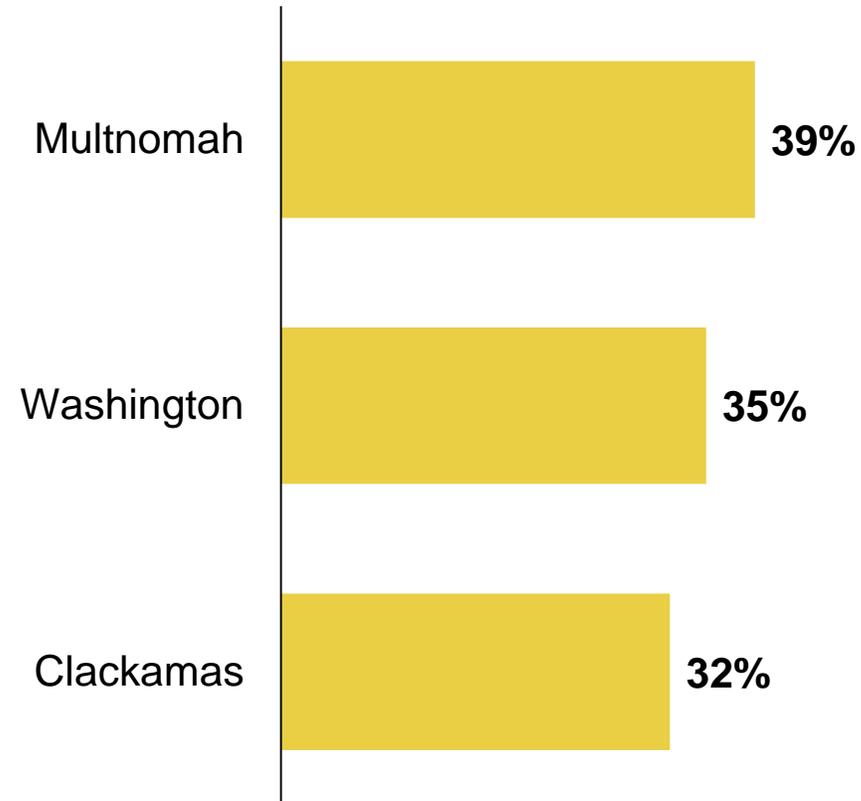
About one-third of residents take advantage of new ridehailing technology. Use is typically infrequent.



Rates of ridehailing use are higher among those under 30 and those with higher incomes.

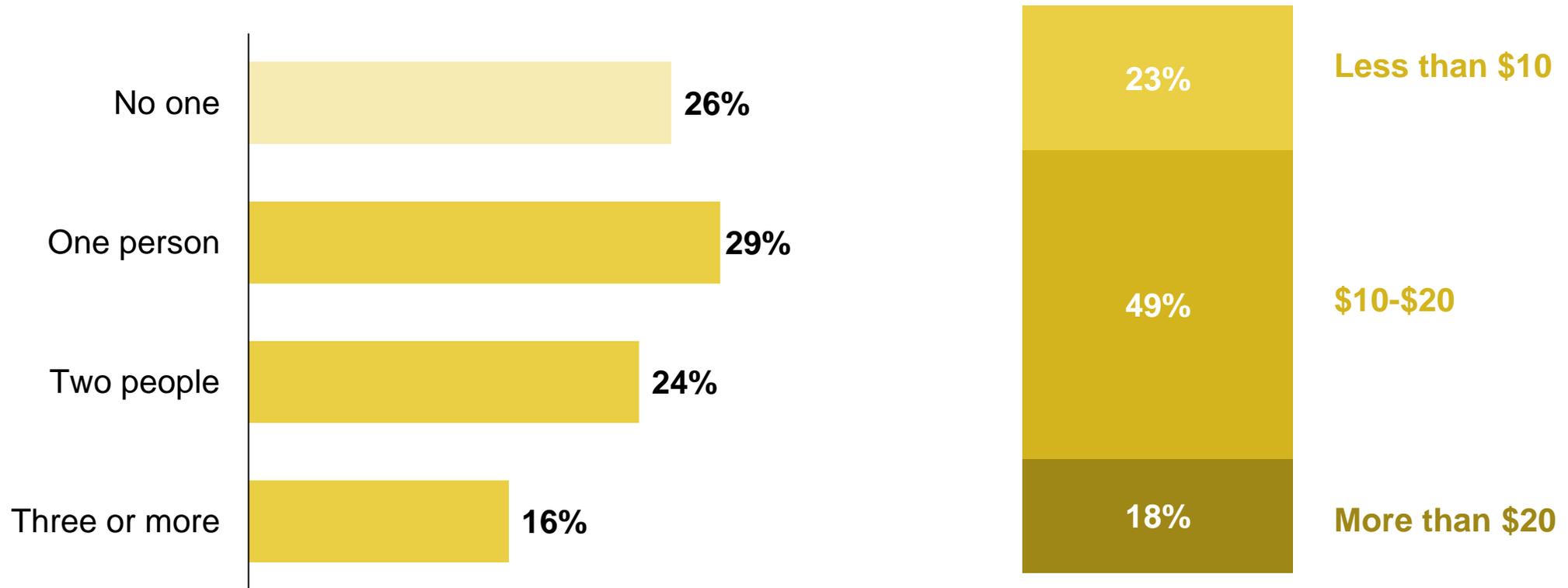


Residents from all counties use ridehailing at approximately the same rate.

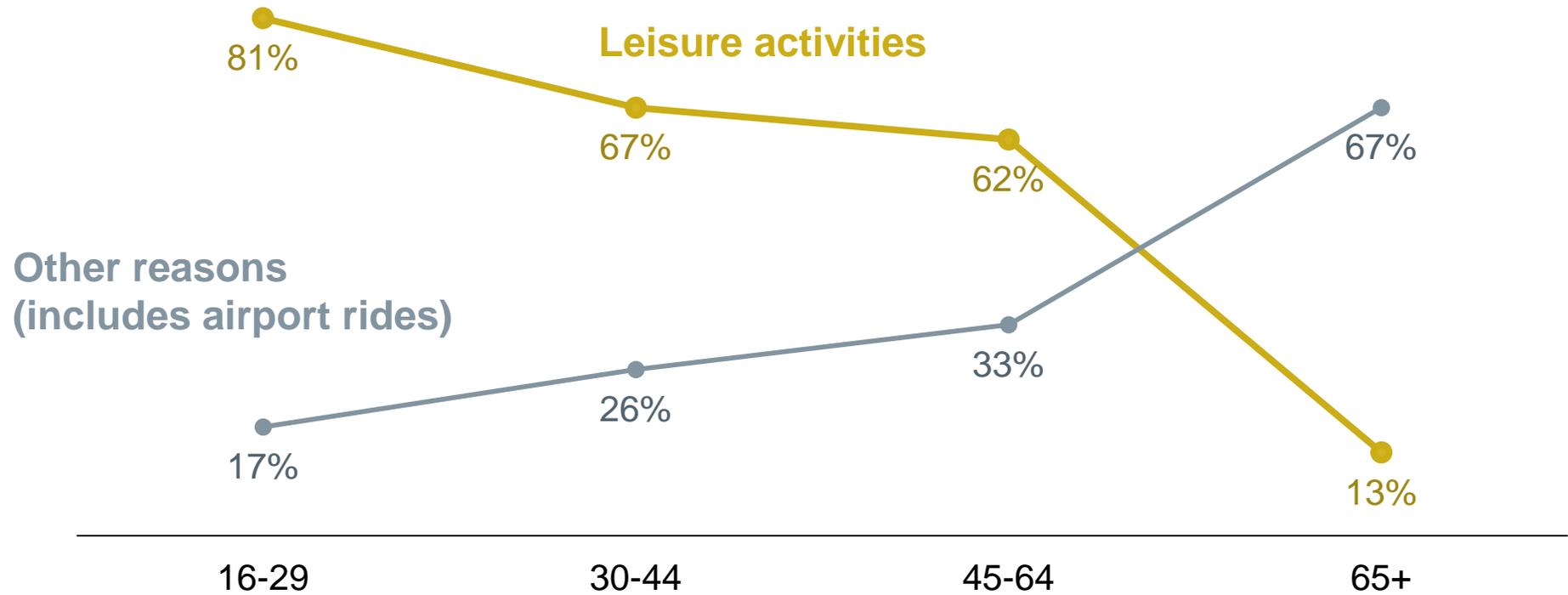


Most residents share the car with other passengers when ridehailing, and nearly half of rides cost \$10-\$20.

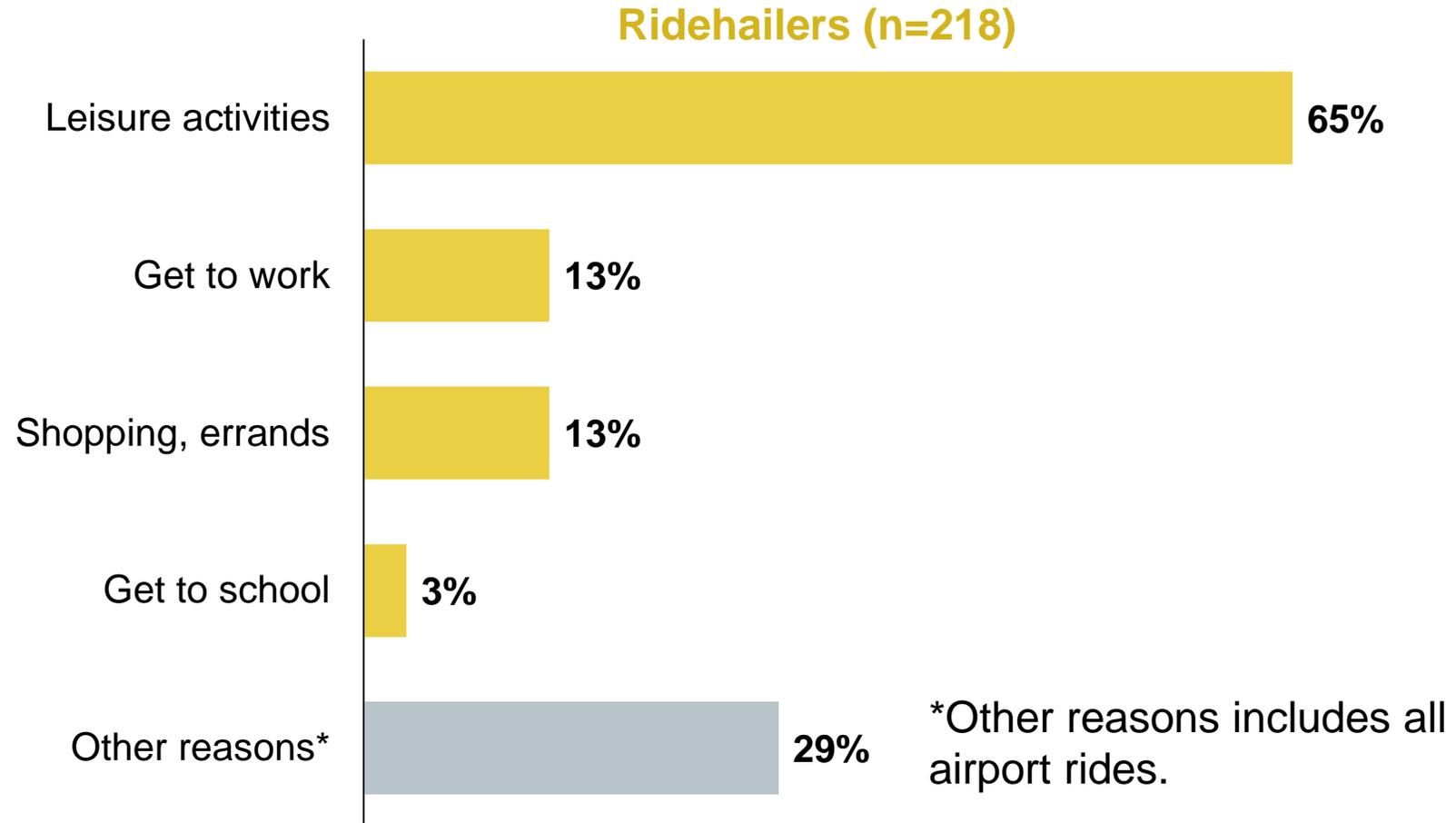
How many people ride with you?



Ridehailing for leisure activities decreases with age, but using the service for other reasons increases with age.

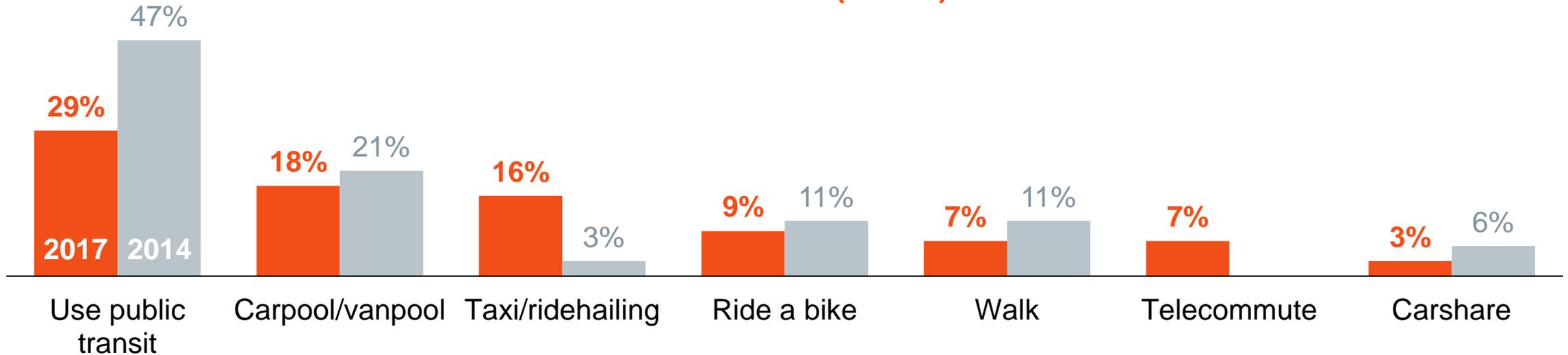


When residents choose ridehailing, it is typically for their leisure activities rather than a commute option.



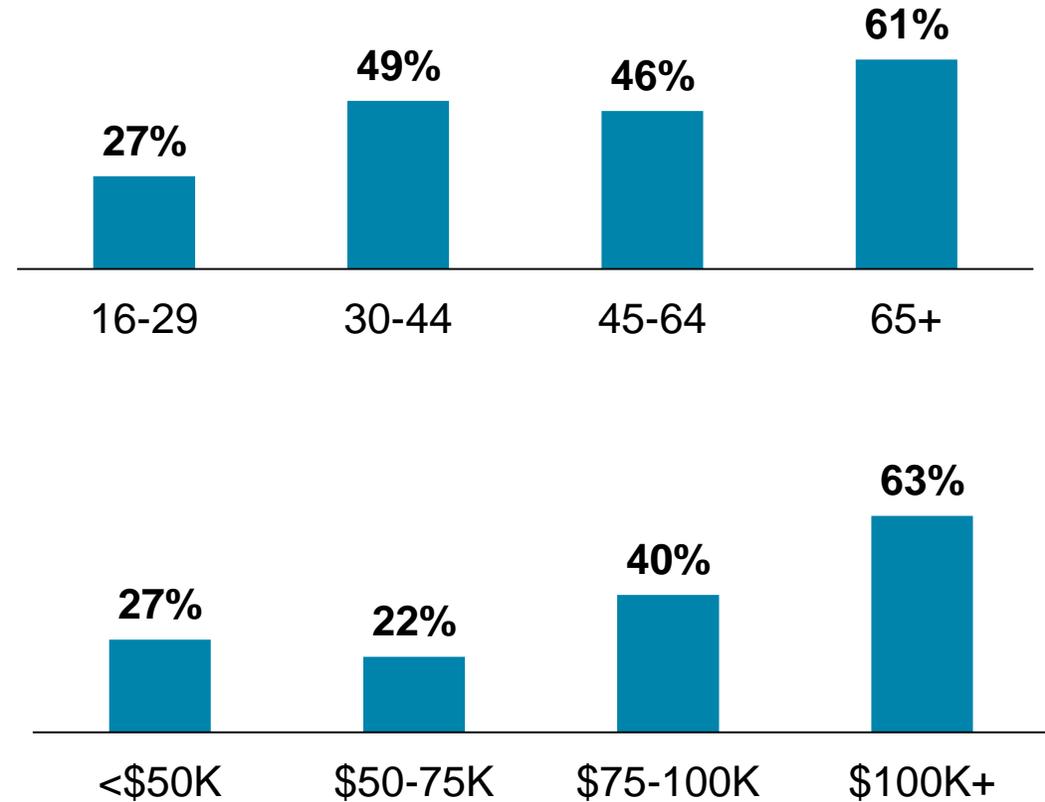
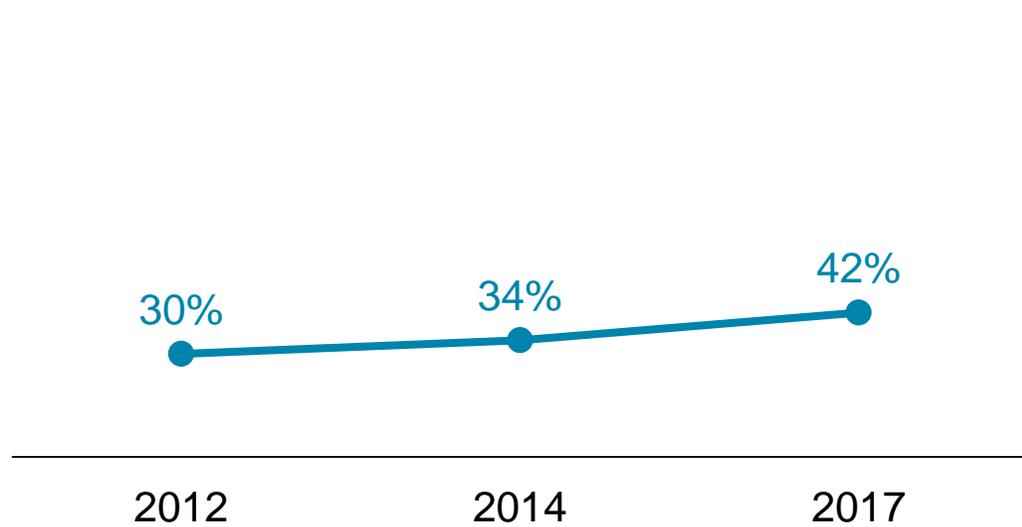
When asked what they would do without access to a car, drivers continue to say public transit is their top choice.

Driving is a primary mode + commute to work/school (n=389)



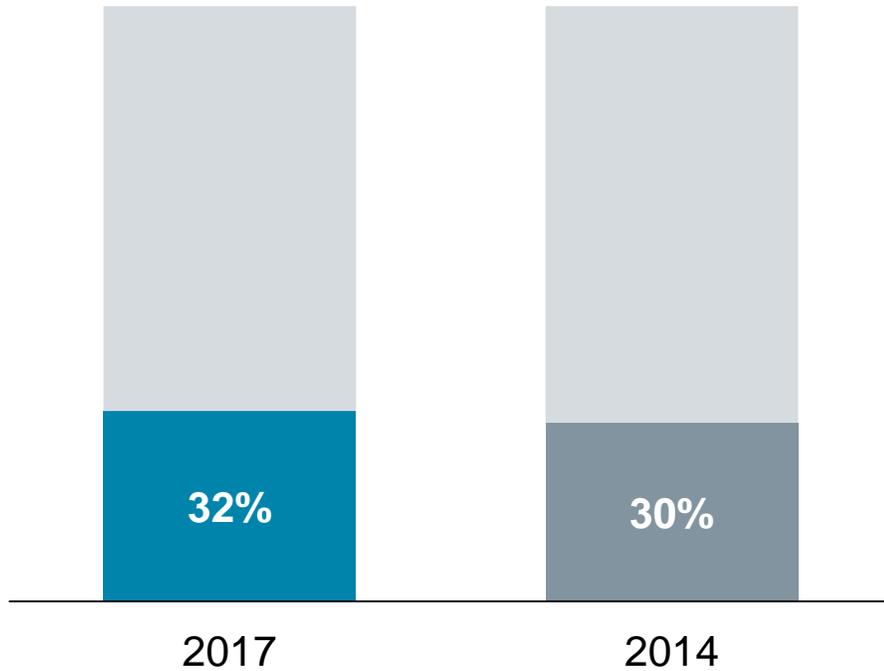
**Note: Response options and question wording differed across time.*

Residents are increasingly able to telecommute. The option to do so increases with age and income.

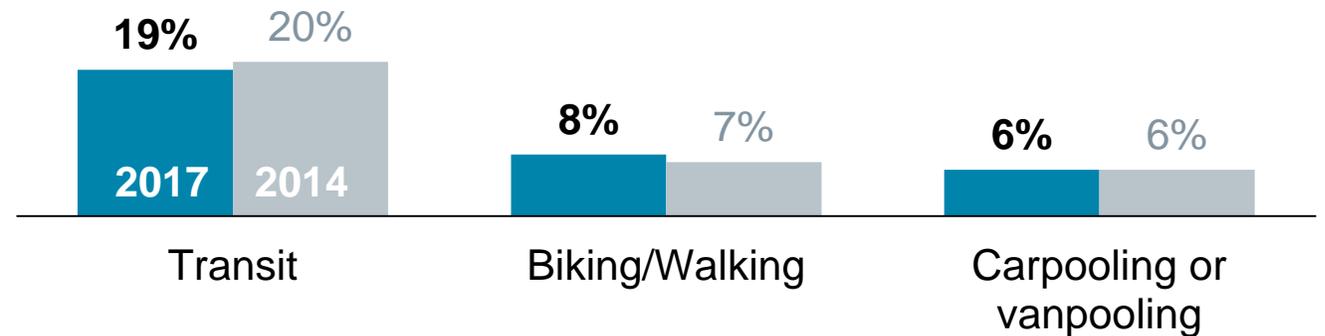


The availability of commute information and financial incentives at work or school has remained stable.

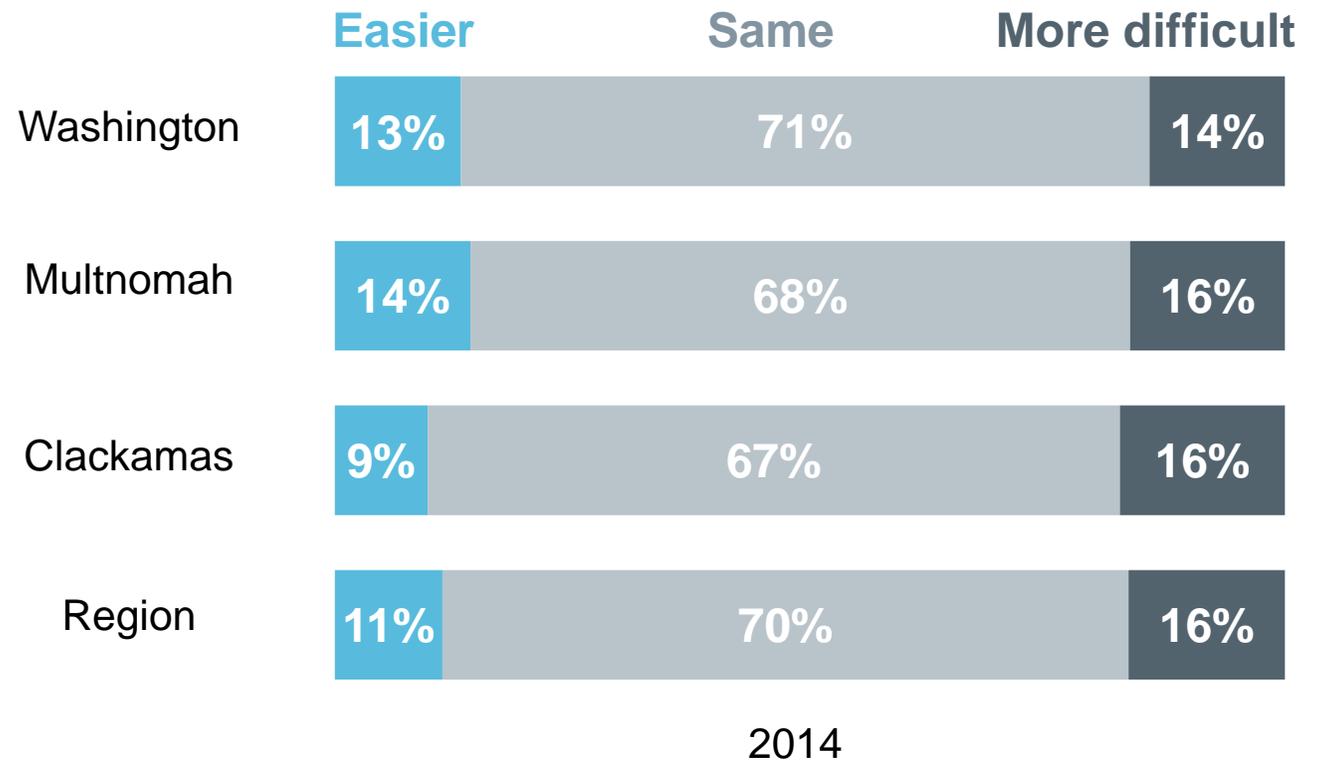
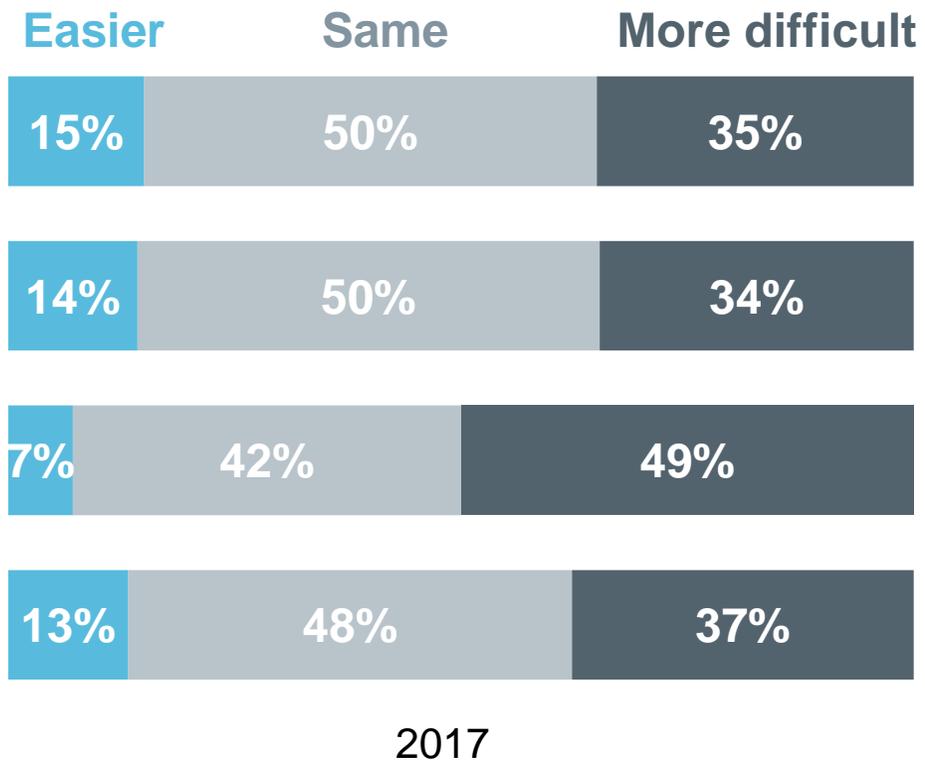
Seen information about transportation options



Offered incentives for commute options

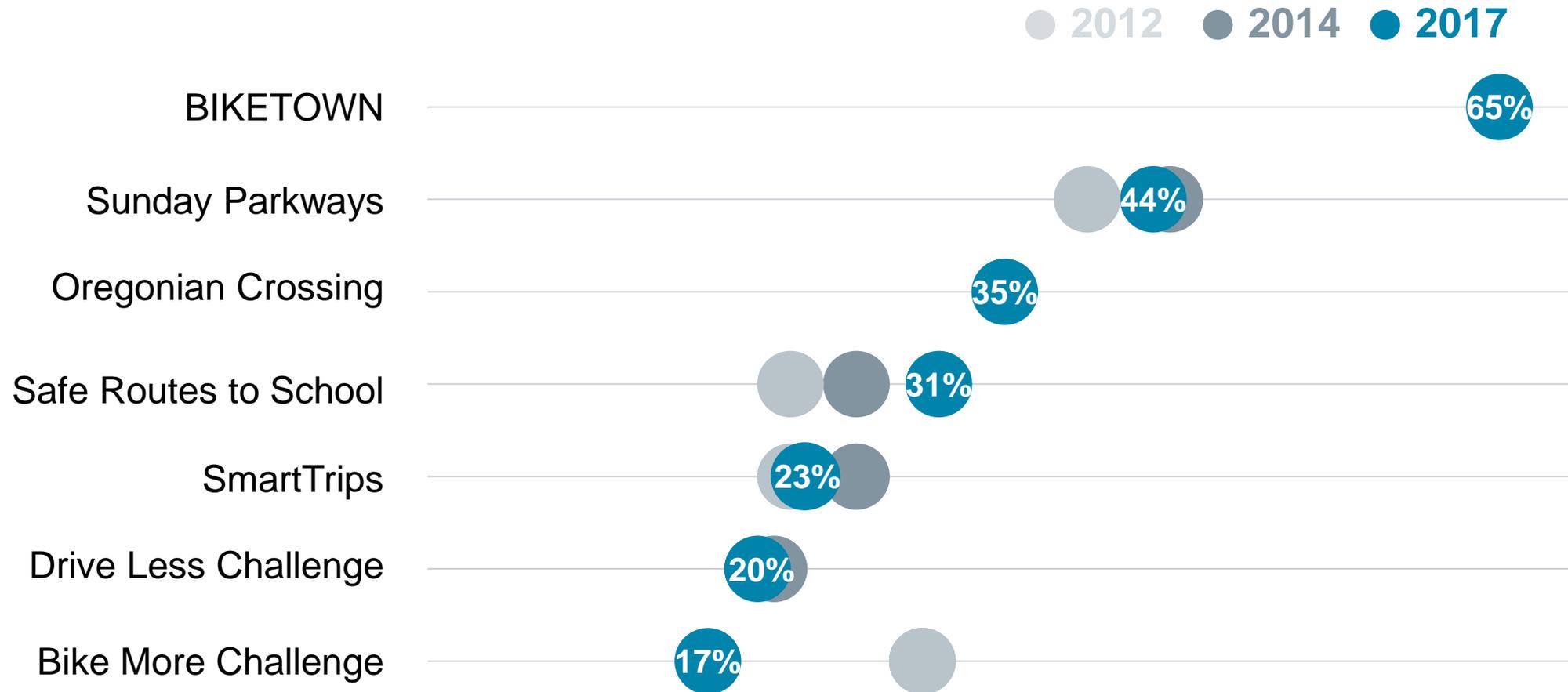


Commuters are finding their daily trips are increasingly more difficult.

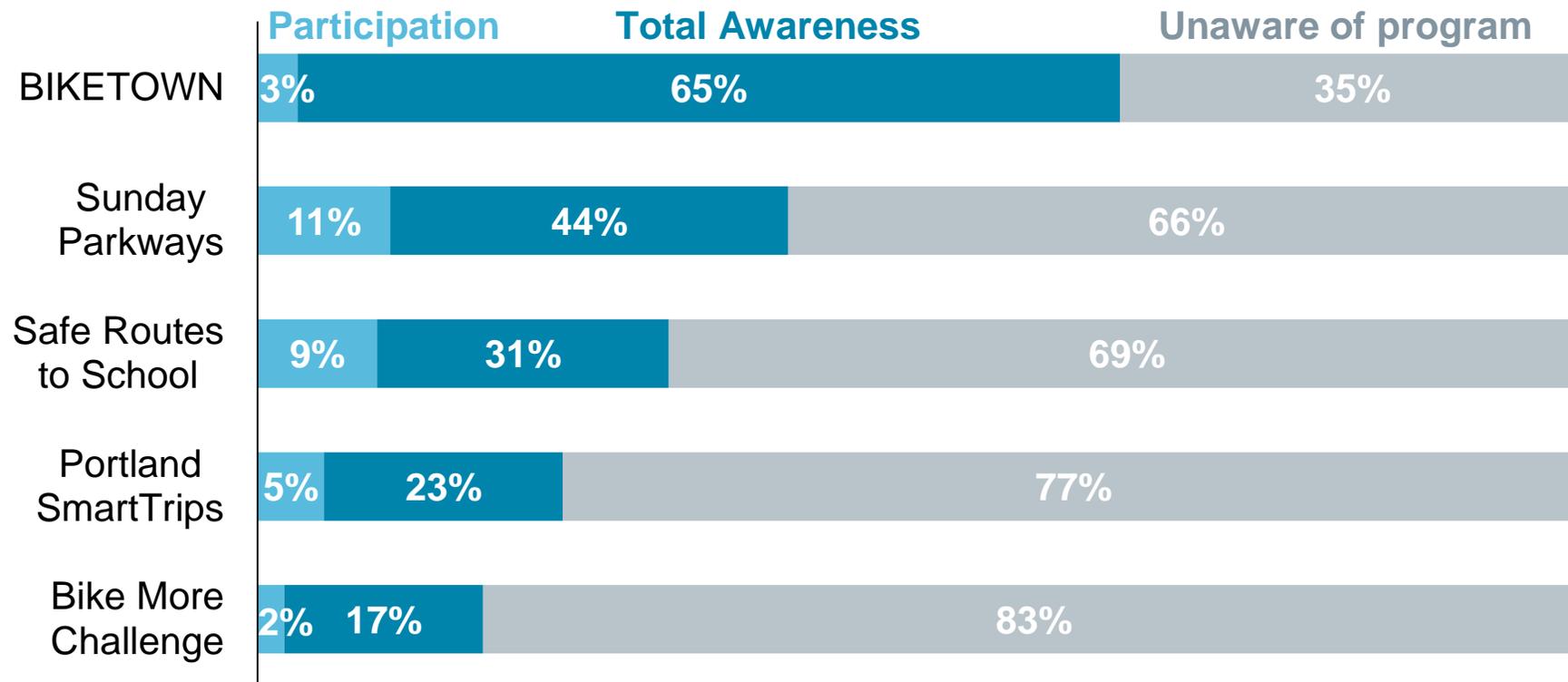


Awareness of and participation in programs

Awareness has remained stable or increased across several RTO programs.

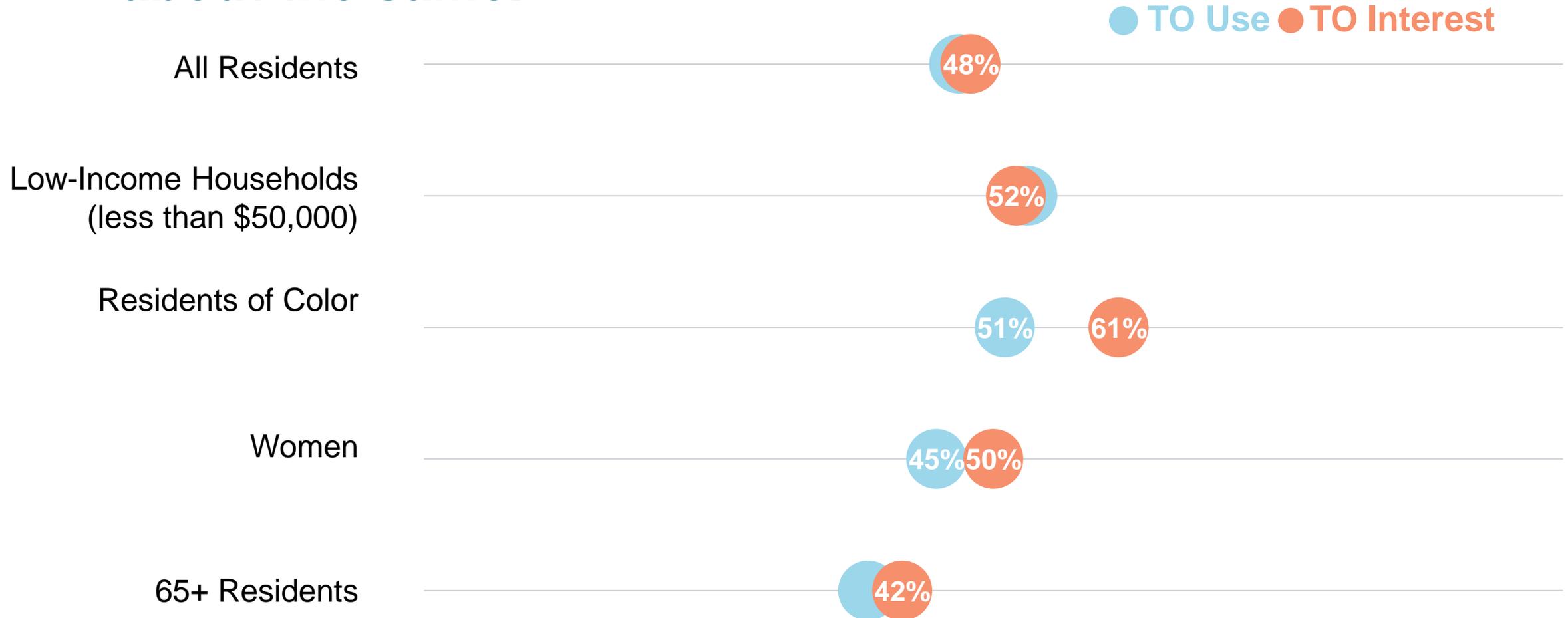


Residents are most aware of BIKETOWN but are most likely to actually participate in Sunday Parkways.

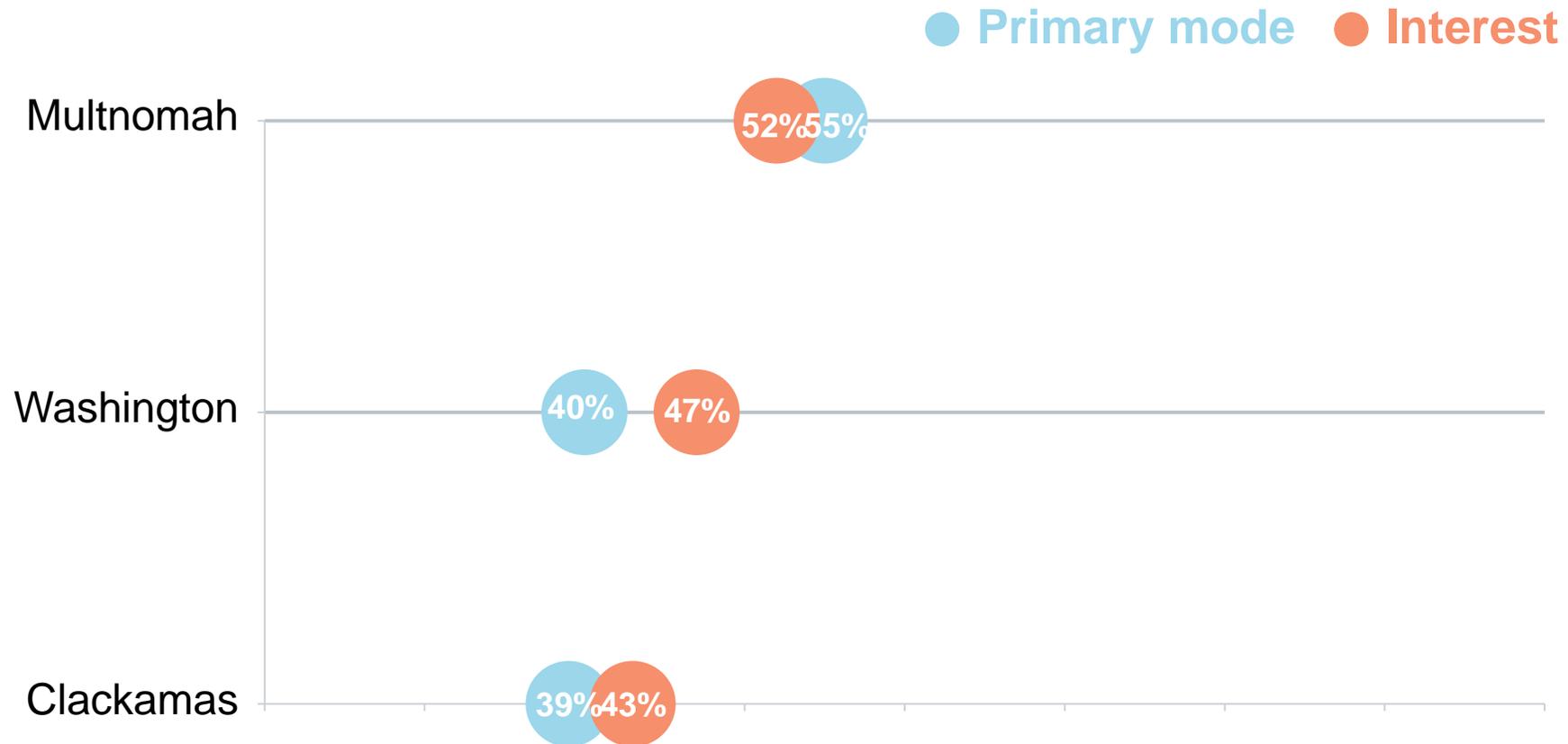


**Use of transportation options and
interest in using options more**

About half of residents are biking, walking, or using transit at least monthly. Interest in using them more is about the same.



More than half of Multnomah residents use travel options already, while Washington and Clackamas residents would like to use them more often than they do now.



What We Know: Quiz Answers!

1. Rarely
2. 37%
3. 47%
4. Almost Half
5. Public Transit

How We Use It

1. Topic Area Report – New Mobility Services
2. Behavior Change Continuum
3. Active Transportation in the Community
4. Context Scores & Cluster Analysis
5. Topic Area Report – Travel Choices

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Metro

State of the Metro

Region:

Regional Forecast

Joint MTAC & TPAC Presentation

February 7, 2018

Today's Agenda

- Forecast background
- State of the Region
- U.S. Macroeconomic Outlook
 - Long-term forecast factors
 - Forecast highlights
- Regional Forecast Highlights
- Questions



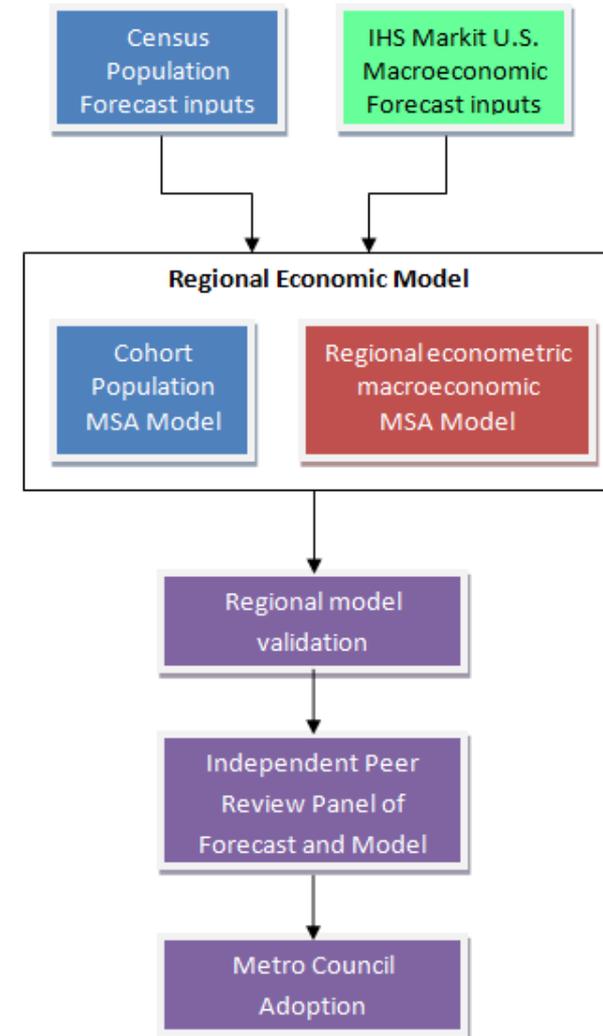


Metro

Forecast Background

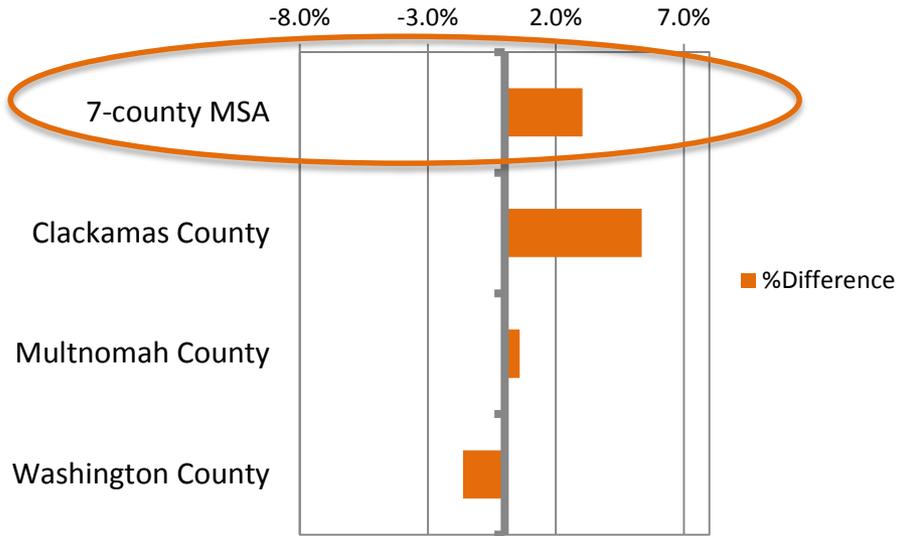
Forecast Anchored in National Economy & Peer-Reviewed

- Key input: IHS national economic forecast
- Key tool: Metro's Regional Economic Model (REM)
- Validation: history and peer review

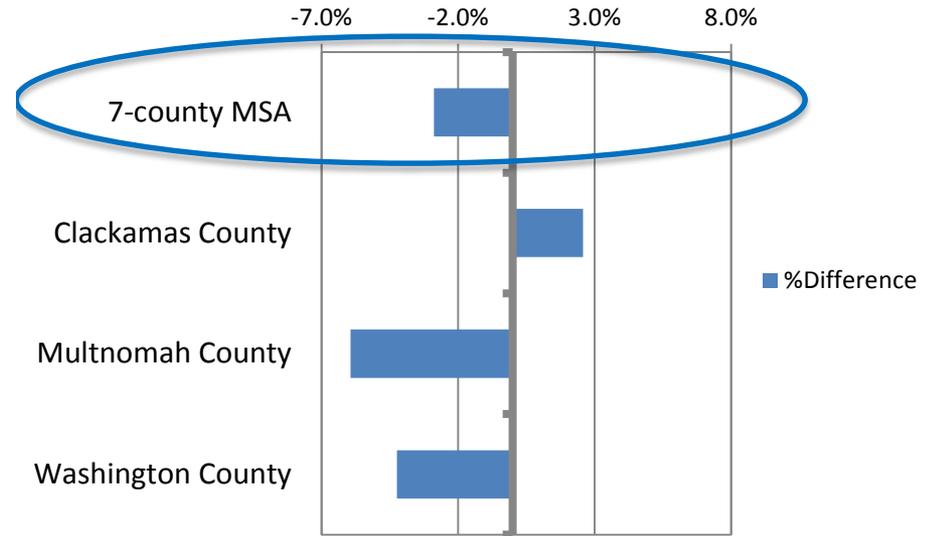


Forecast Accuracy – year 2015

**Population Forecast
(2010 vintage Metro v. PSU est.)**



**Employment Forecast
(2010 vintage Metro v. OED actual)**



OED = OR Employment Dept.

Peer Reviewers met 11-16-17

Christian Kaylor, Portland workforce analyst, OED



Eric Hovee, principal, ED Hovee LLC



Hossein Parandvash, economist, Portland Water Bureau



Nick Chun, forecast manager, PSU PRC



Scott Bailey, regional economist, WA ESD



Steve Storm, Northwest Natural



NW Natural

Tom Potiowsky, director, PSU NERC





Metro

State of the Metro Region

Geographic scope of MSA regional forecast model



Population Growth

Portland MSA is home to **2,407,540 residents in 2017**

Population growth:

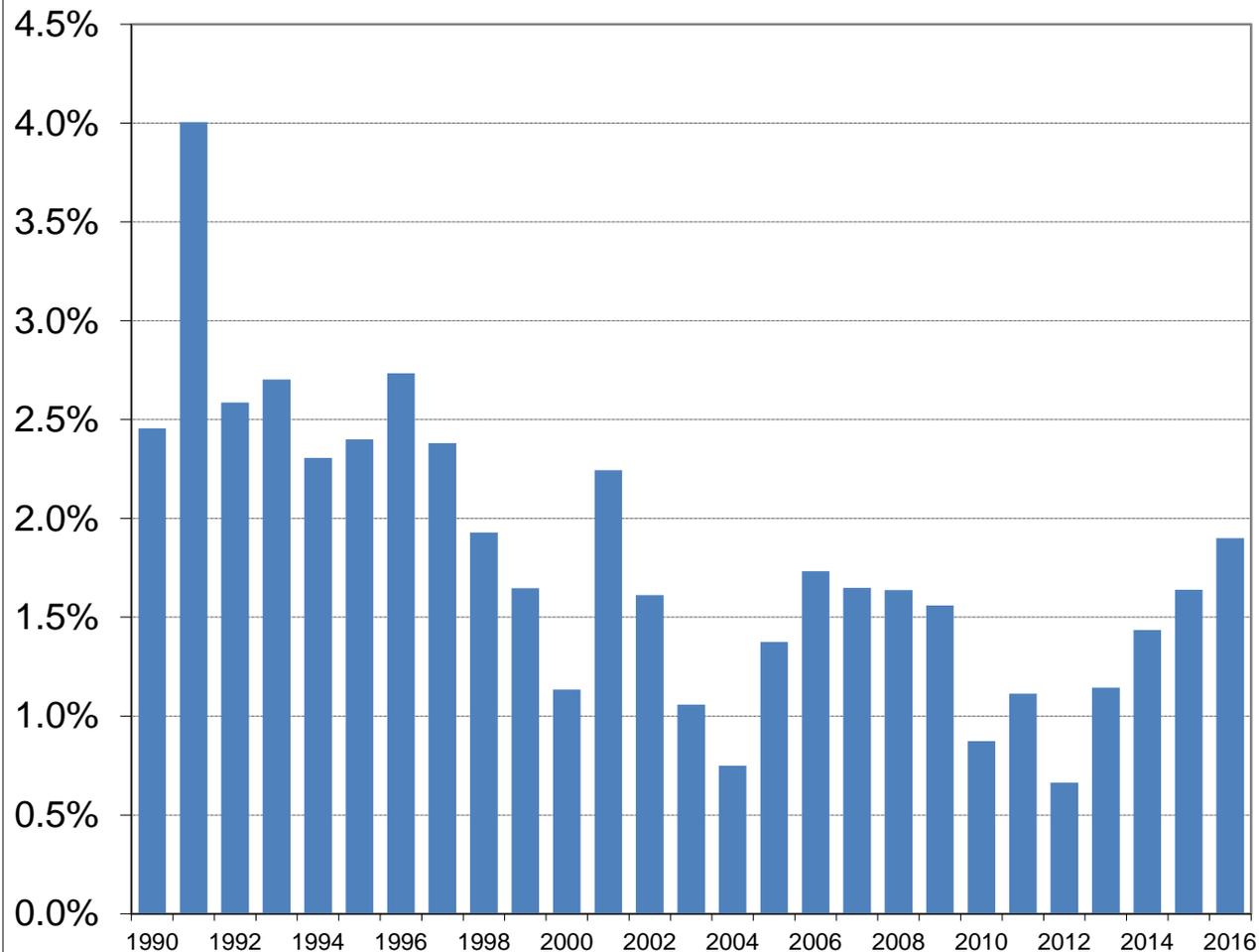
1.8% APR (1960-2016)

1.9% (in 2016)

Counties in the MSA

- Clackamas
- Columbia
- Multnomah
- Washington
- Yamhill
- Clark
- Skamania

Source: PSU and Census



Employment Growth

Portland MSA hosts *1,111,900 jobs in 2017*

Job growth:

2.6% APR (1960-2016)

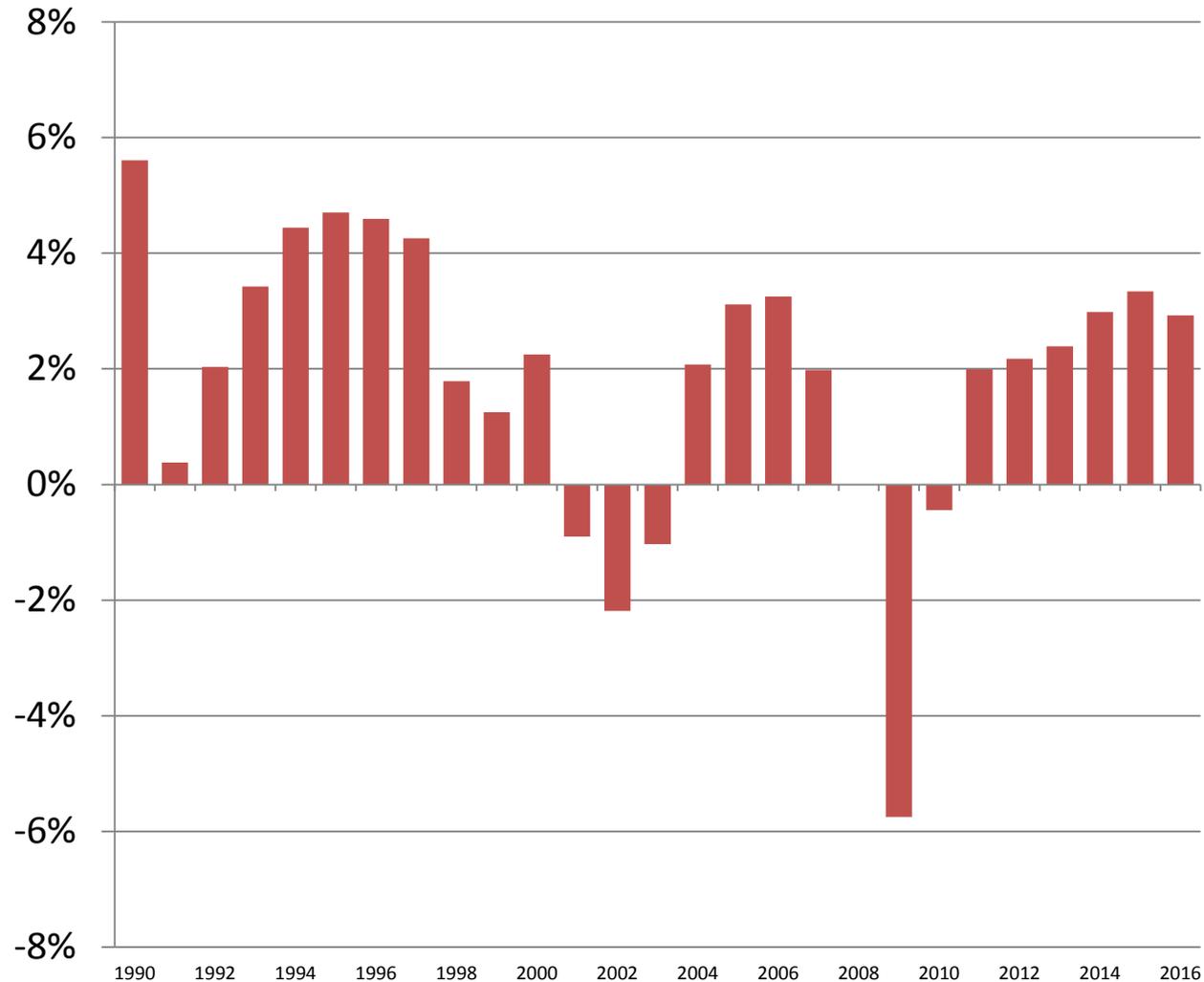
2.9% (in 2016)

Counties in the MSA

- Clackamas
- Columbia
- Multnomah
- Washington
- Yamhill
- Clark
- Skamania

Source: PSU and Census

10



Median Family Income

Portland MSA (nominal vs. real dollars)

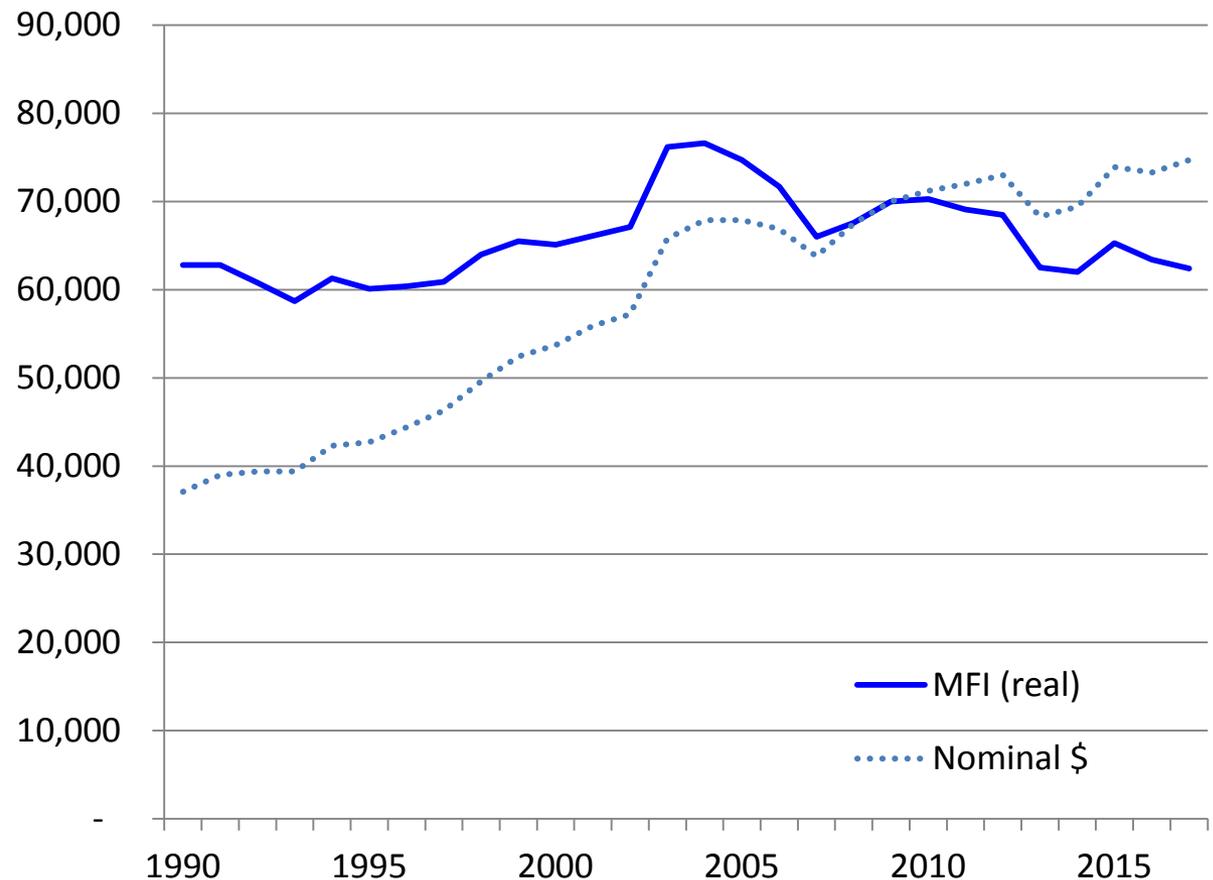
Economic indicator
of household well-
being:

2017 MFI = \$74,700

(Indicator is adjusted
for family size,
otherwise indicator
could be misleading.)

Source: HUD

Family of 4



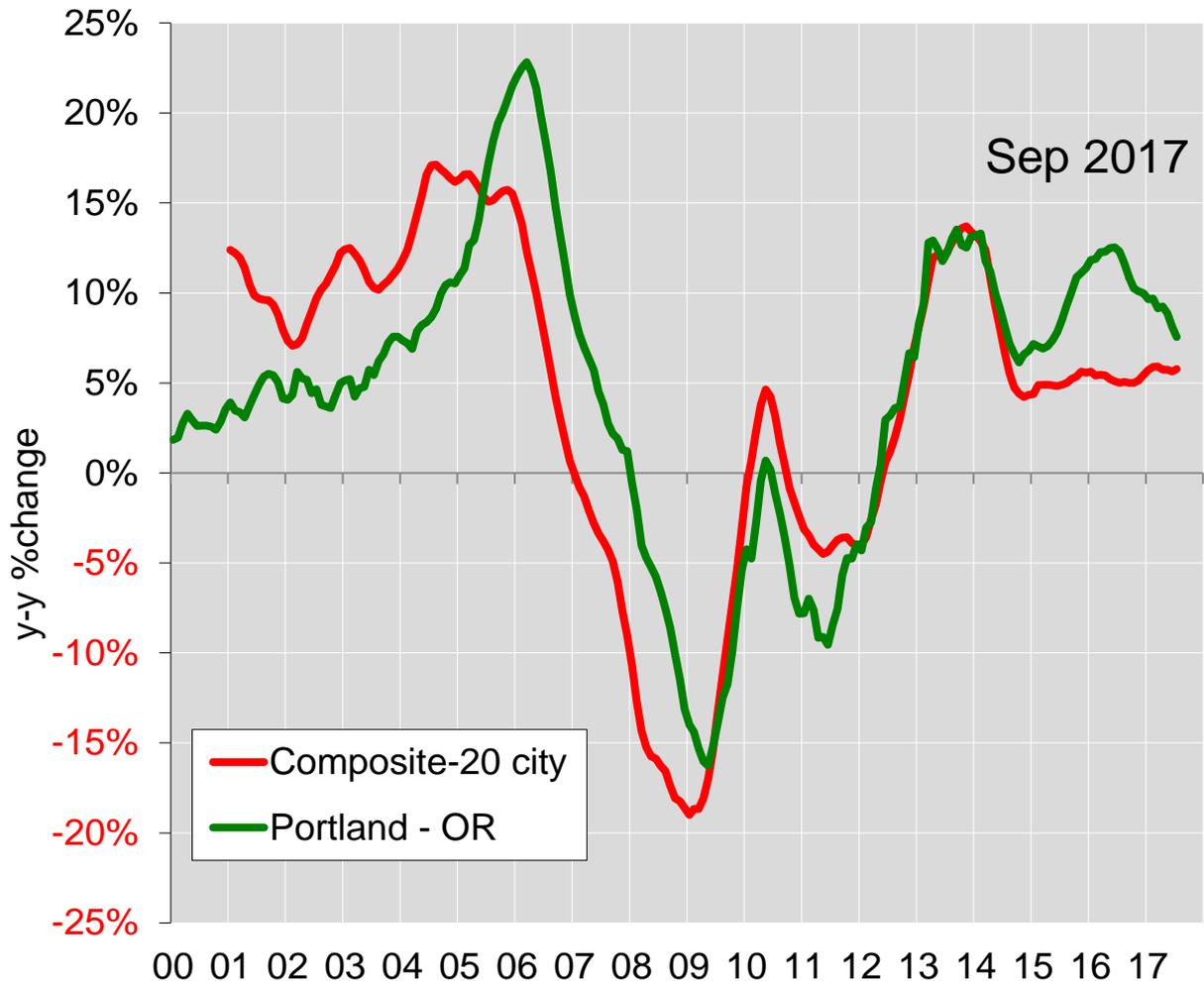
Case-Shiller Home Price Index

Portland MSA (pct. change year ago)

Leading economic indicator:

Home price index is a leading measure of residential real estate prices and construction activity.

Source: S&P Corelogic



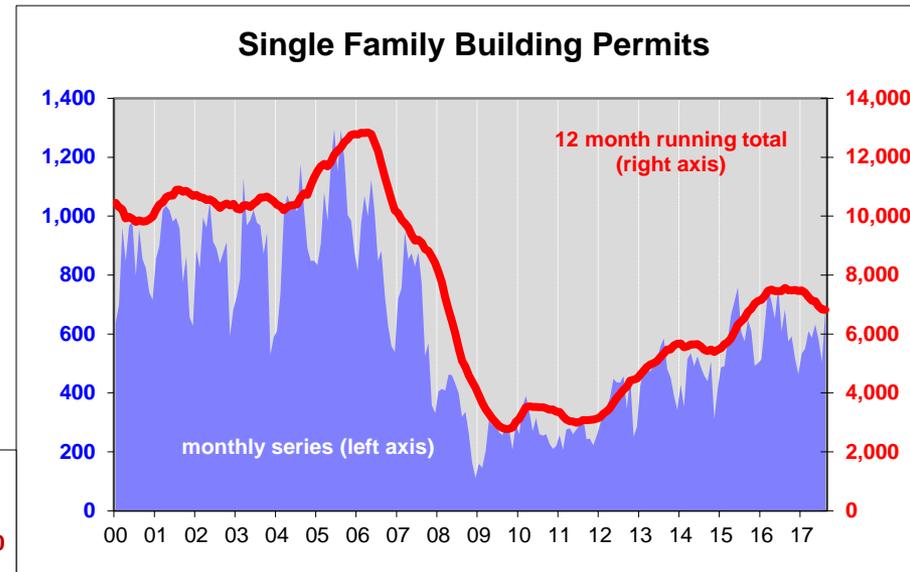
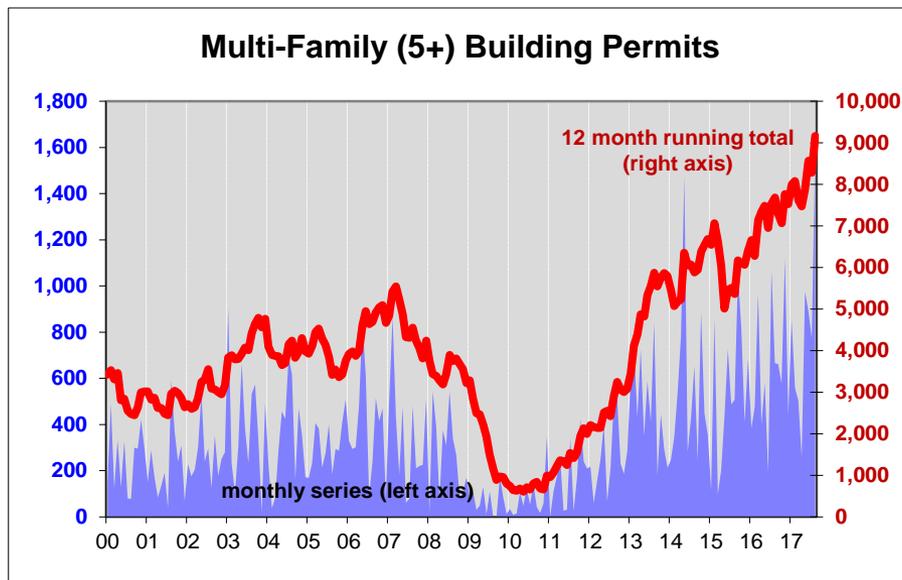
New Residential Construction Permits

Portland MSA (in thousands)

Leading construction / economic indicator:

Single Family permits slowing as y/y monthly figures decline (last reading Aug. 2017)

Source: Census

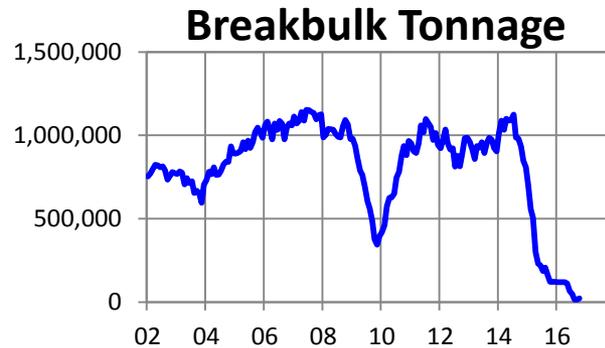


Multi-family permits still rising, but starting to see construction slow for small apartment complexes. (last reading Aug. 2017)

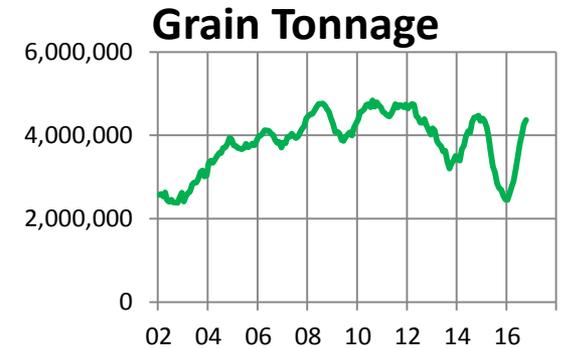
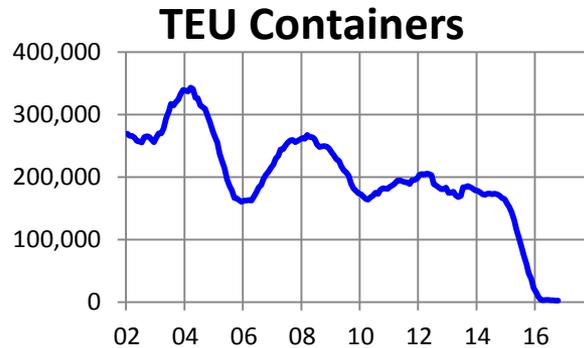
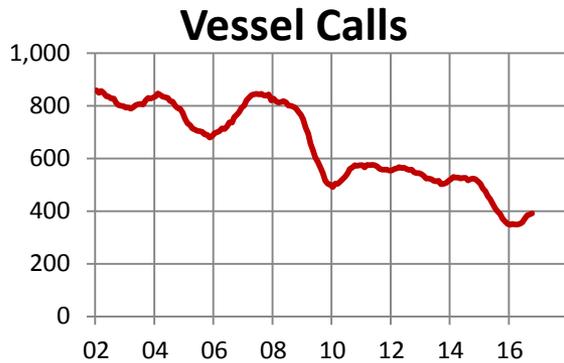
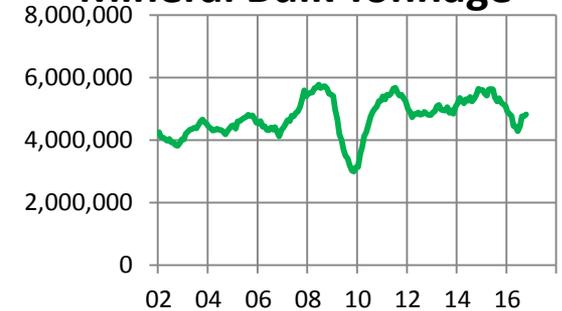
Marine Cargo Trends

Port of Portland (12 month running total)

Coincident / leading economic indicator:
Swire Shipping brings container ship service to PDX in Jan.



Non-container shipments Mineral Bulk Tonnage



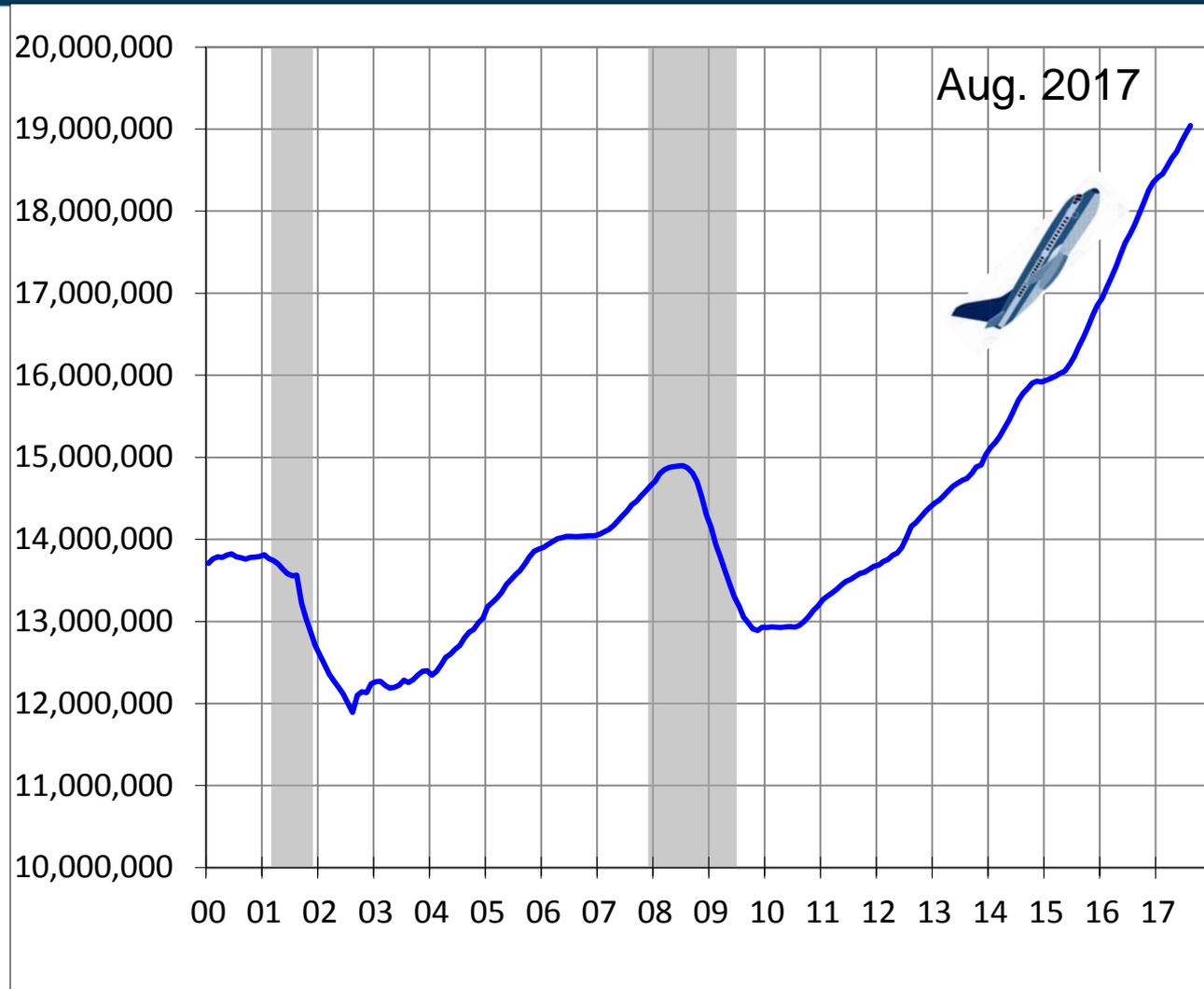
Air Passengers – PDX

(12 month running total)

Coincident / leading economic indicator:

83 out of last 84 months have seen y/y increase in passenger boardings

Source: Port of Portland



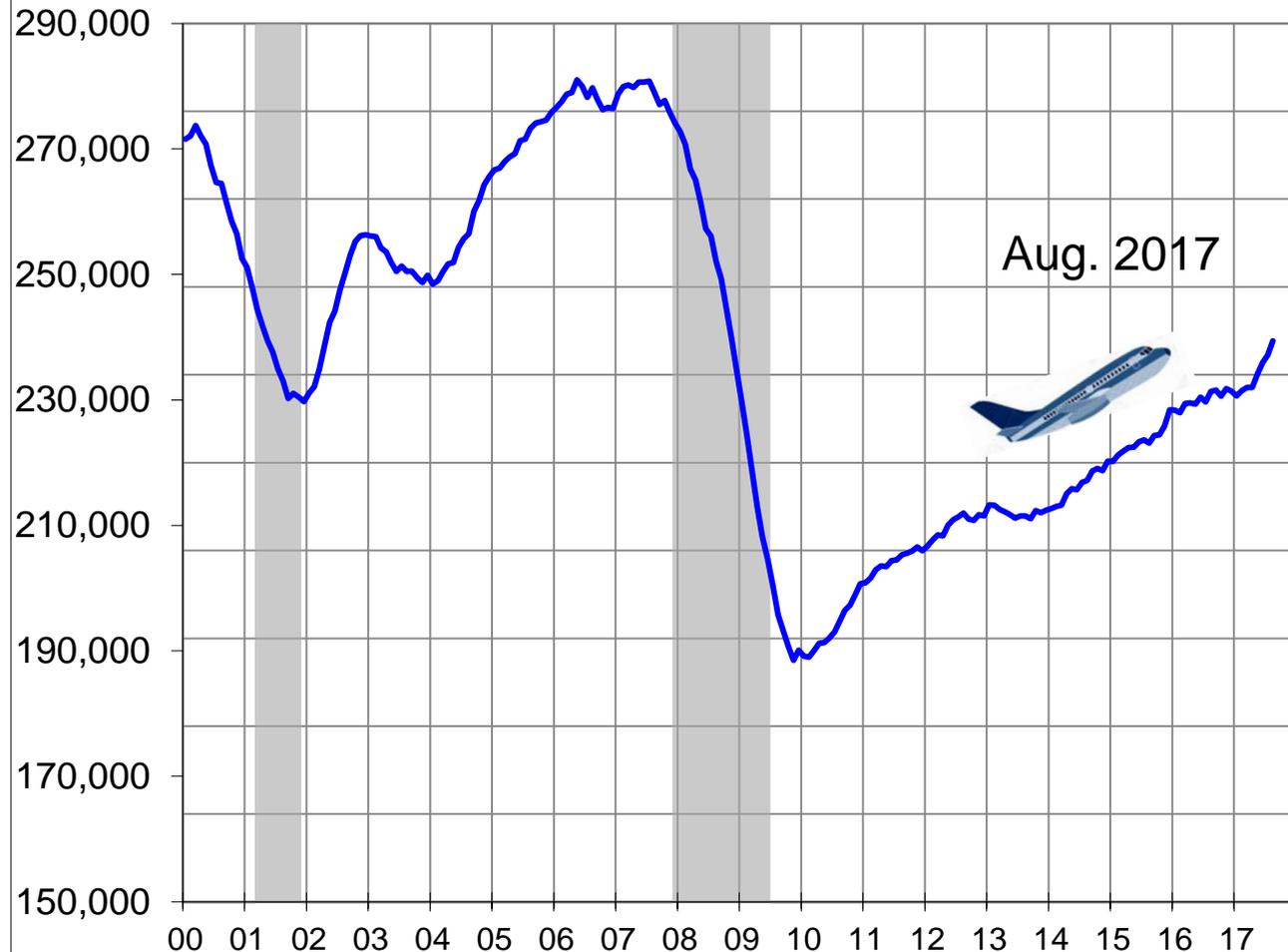
Air Cargo tonnage – PDX

(12 month running total)

Coincident / leading economic indicator:

Air cargo tonnage has steadily risen since the recession, but has yet to reach pre-recession levels

Source: Port of Portland

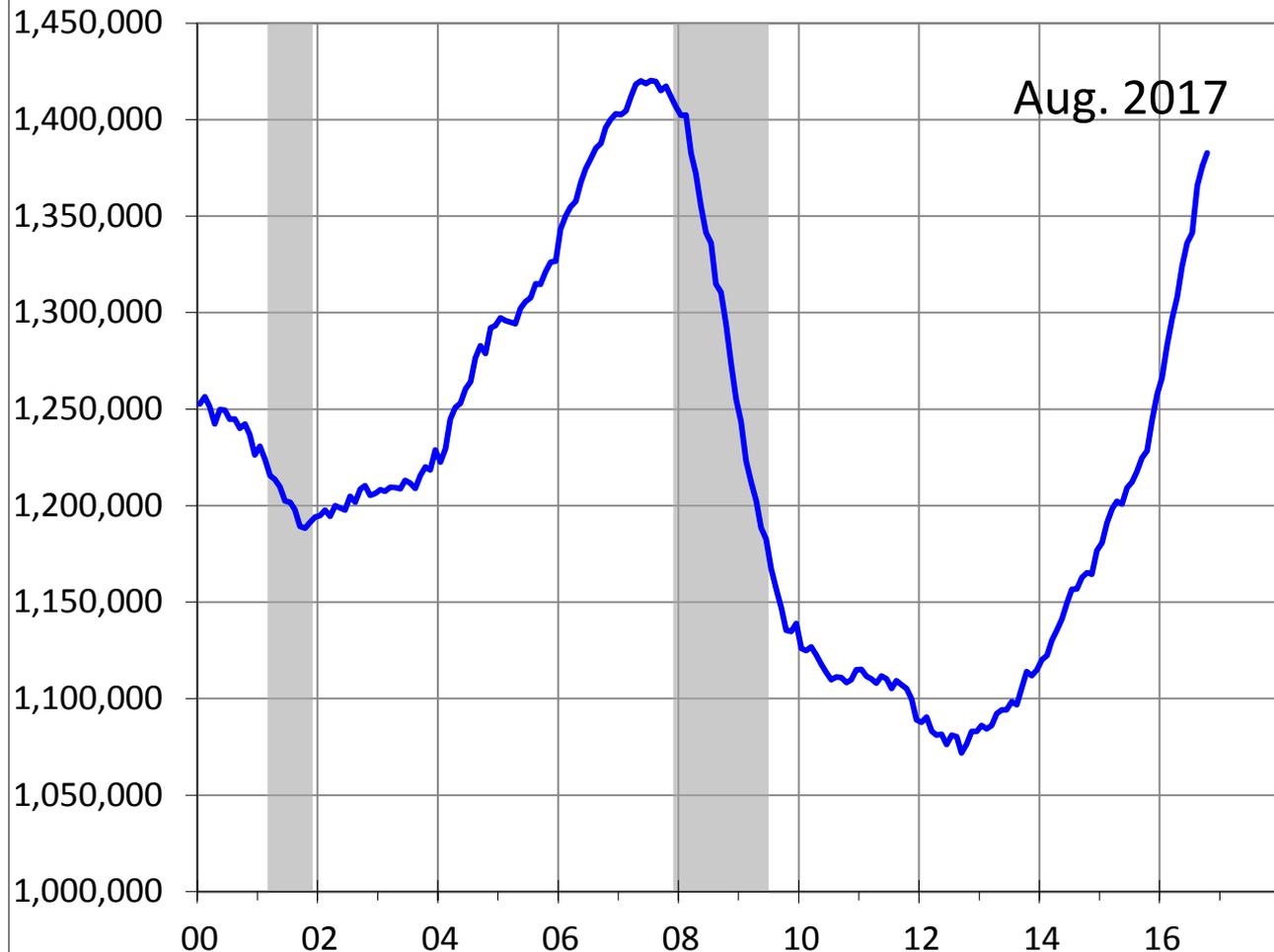


Core Solid Waste Tonnage

Metro Region (12 month running total)

Coincident economic indicator:

Waste generation on upward trend since recession ... almost to pre-recession peak



Nonfarm Total Employment

Portland MSA (y/y percent rate)

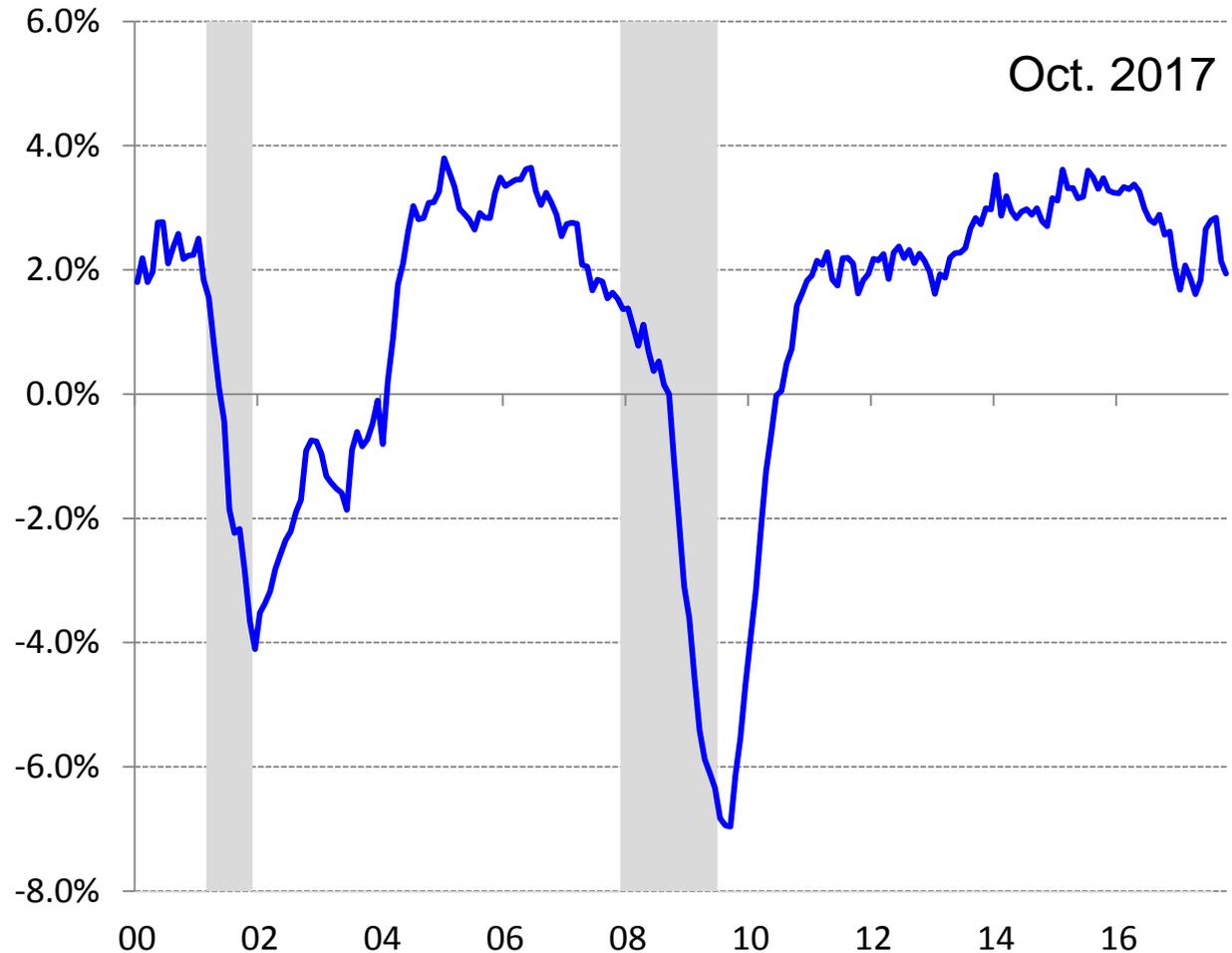
Lagging economic indicator:

Robust job growth since early 2011...

... topping out in mid-2015

... growth rates have moderated since

... anticipate job growth to taper more as U.S. economy slows



20

Employment Gains since end of Great Recession

Portland MSA

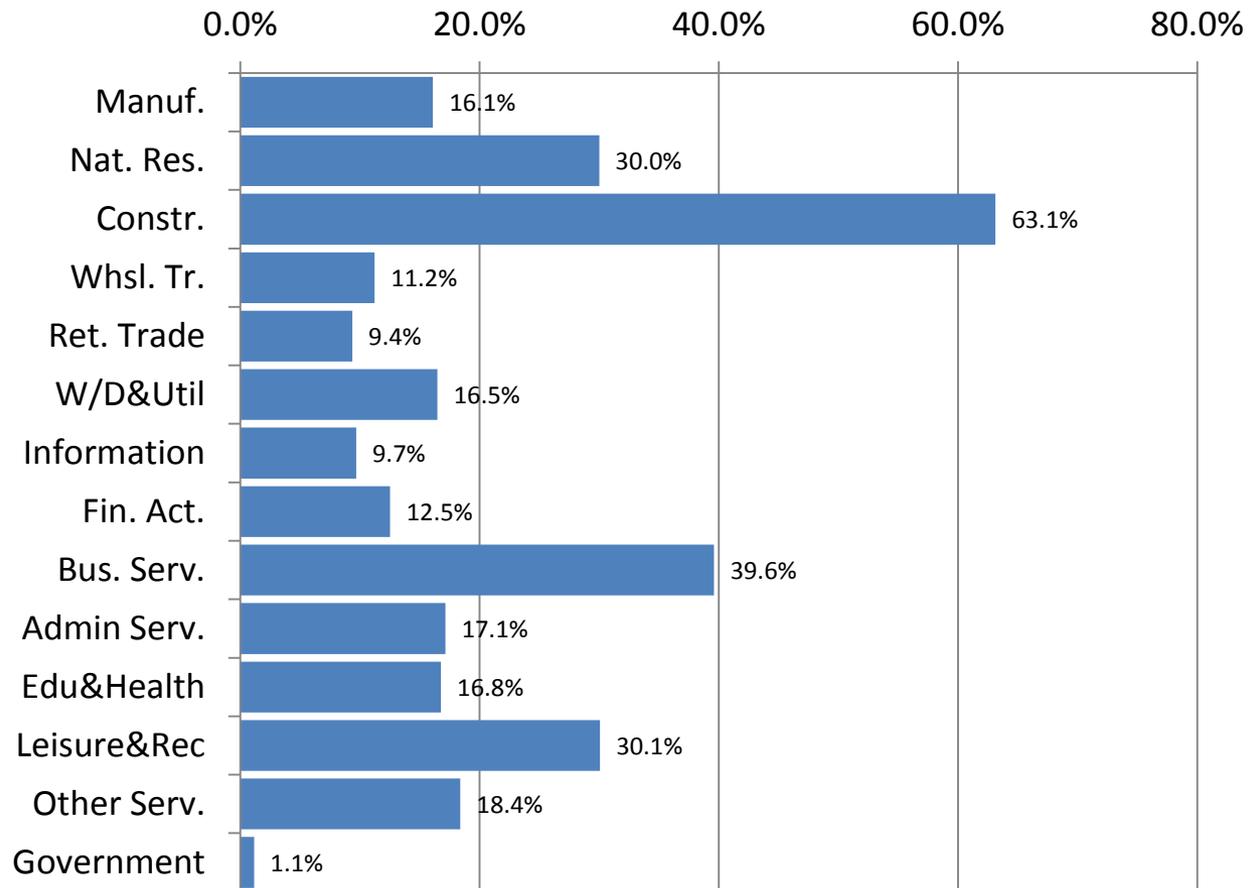
Sector specific job indicators:

Top growth sectors:

- Construction
- Business services
- Leisure & hospitality

Source: BLS

(pct. chg. since end of 2011)



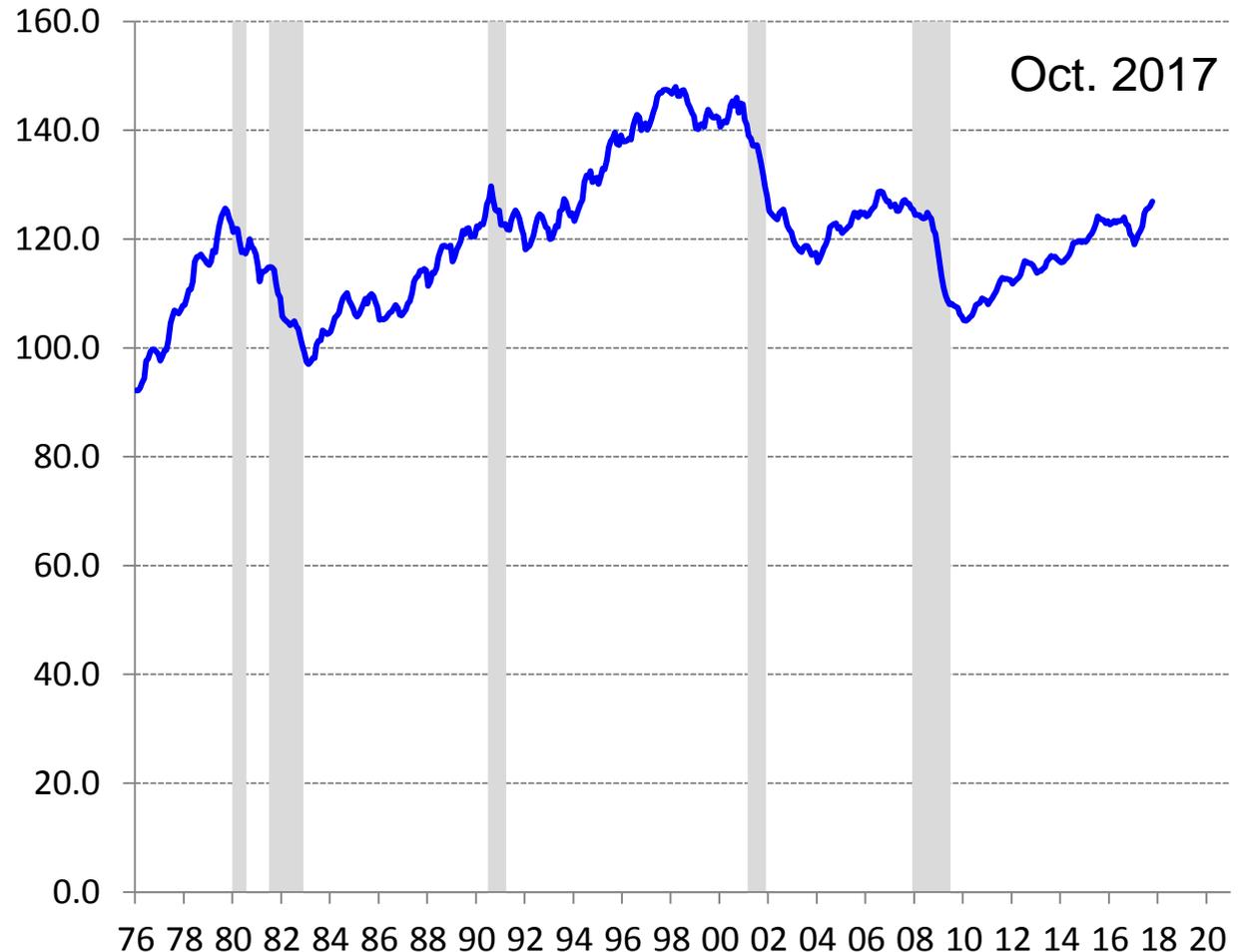
Manufacturing Employment

Portland MSA (in thousands)

Lagging economic indicator:

Manufacturing employment has yet to return to pre-recession level of jobs ... growth has been tapering down during the last year.

Source: BLS

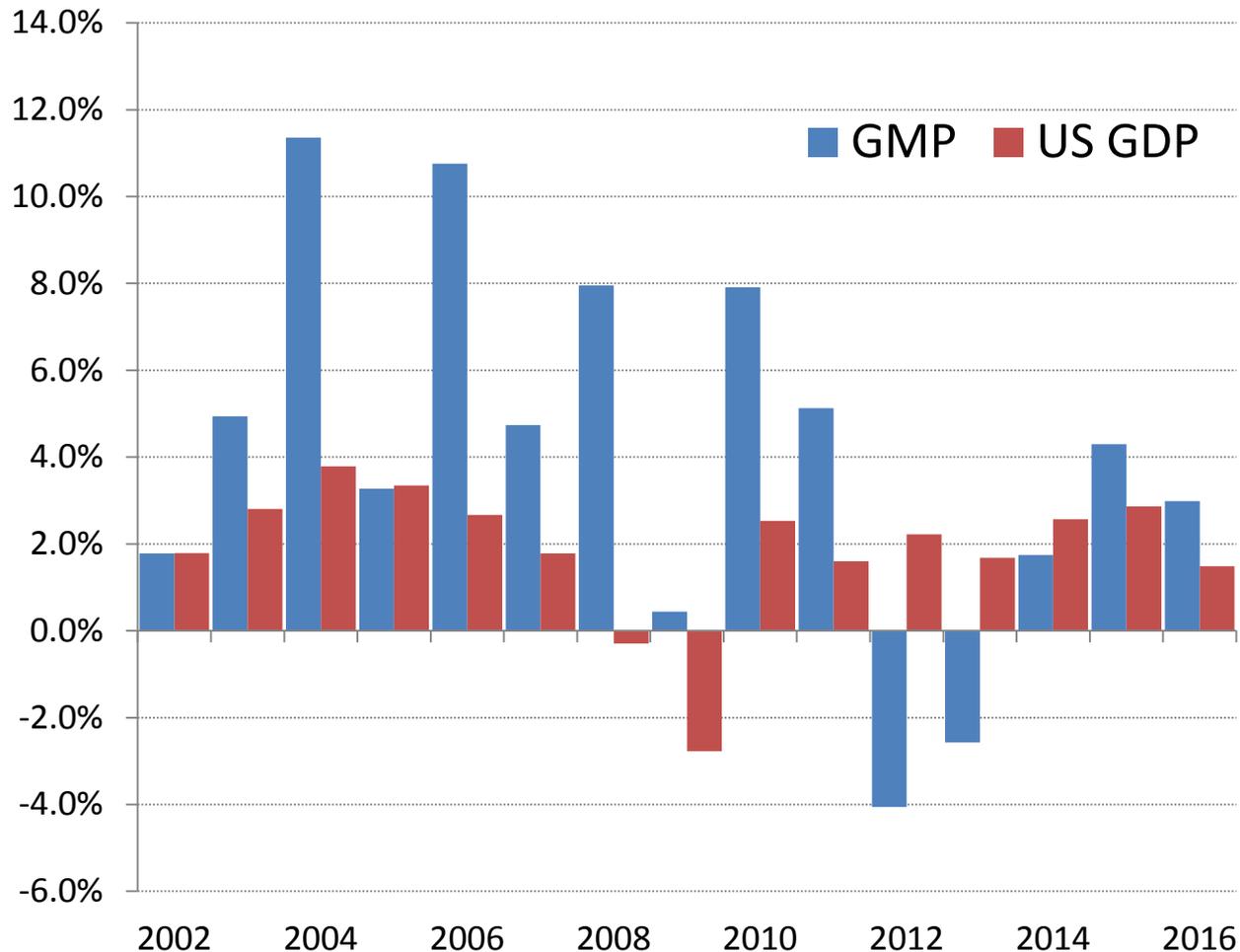


Comparison: MSA & U.S. Economic Growth (annual year-to-year %)

Gross Metropolitan Product (GMP) and Gross Domestic Product (GDP) (inflation adjusted)

Region stumbled coming out of the recession, but has recovered strongly.

Source: BEA





Metro

IHS Markit Forecast

(formerly Global Insight)

US Macroeconomic Outlook

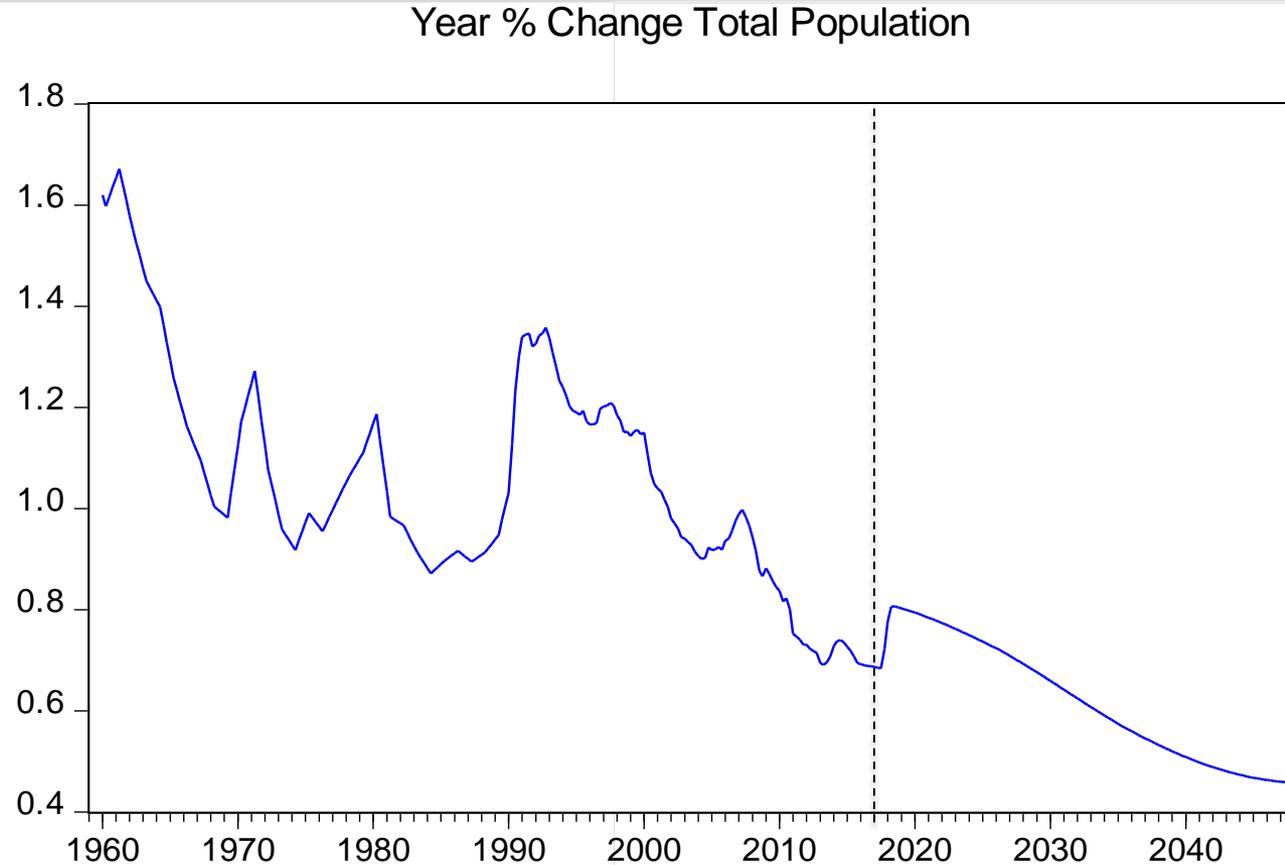
August 2017 vintage



IHS Markit

U.S. Population Growth

Annual population growth is projected to drift lower to 0.46% average per year at the end of forecast



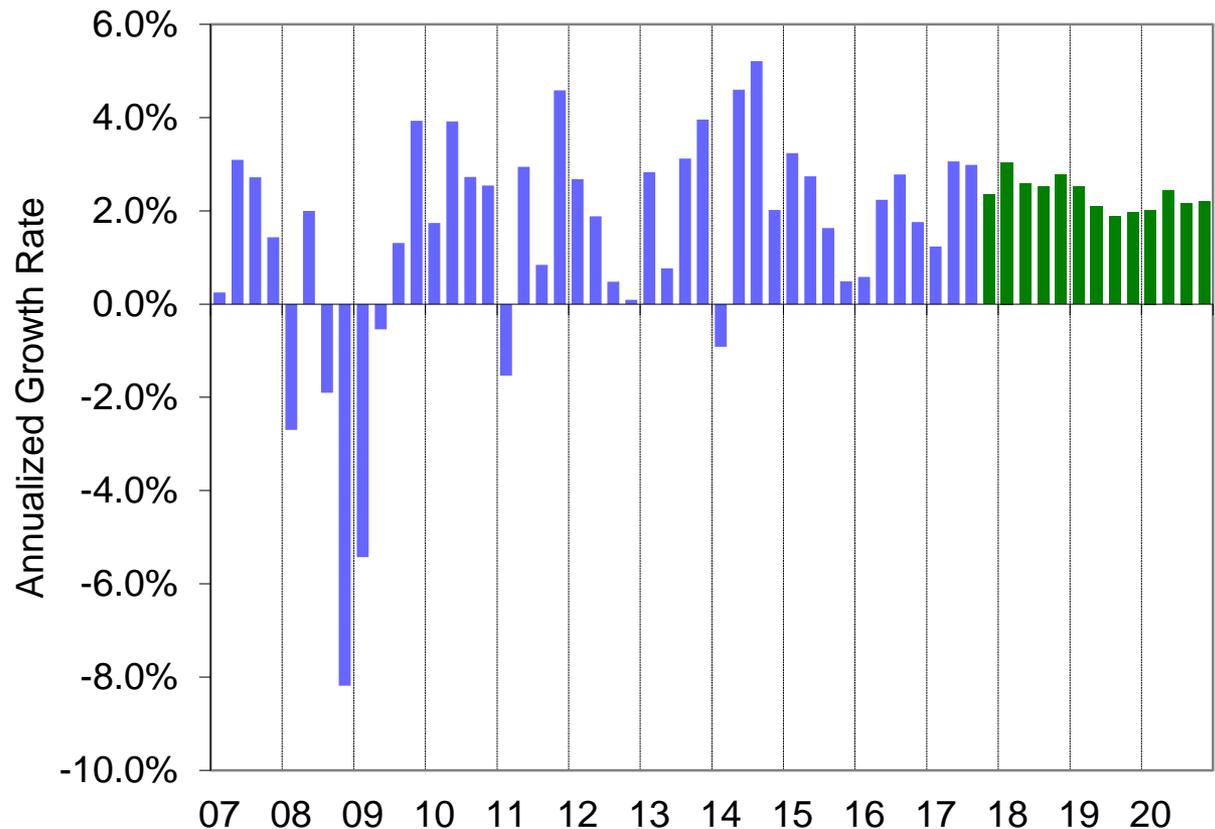
U.S. real GDP Growth

U.S. GDP rose above 3% in the last 2 quarters

First time GDP has topped 3% growth in over 2 years

In future GDP expected to be steady but slower ... about 2% per year

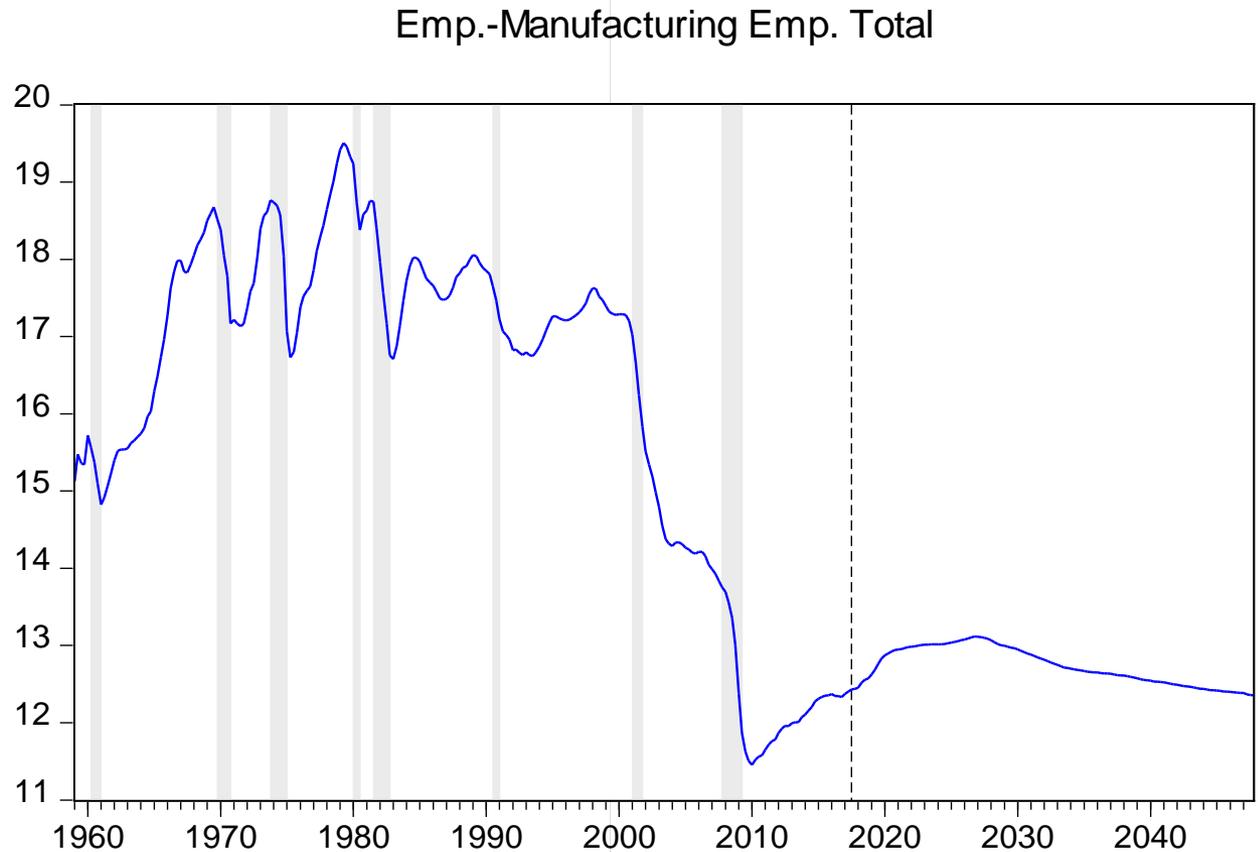
U.S. Gross Domestic Product
(inflation adjusted)



U.S. Manufacturing Jobs

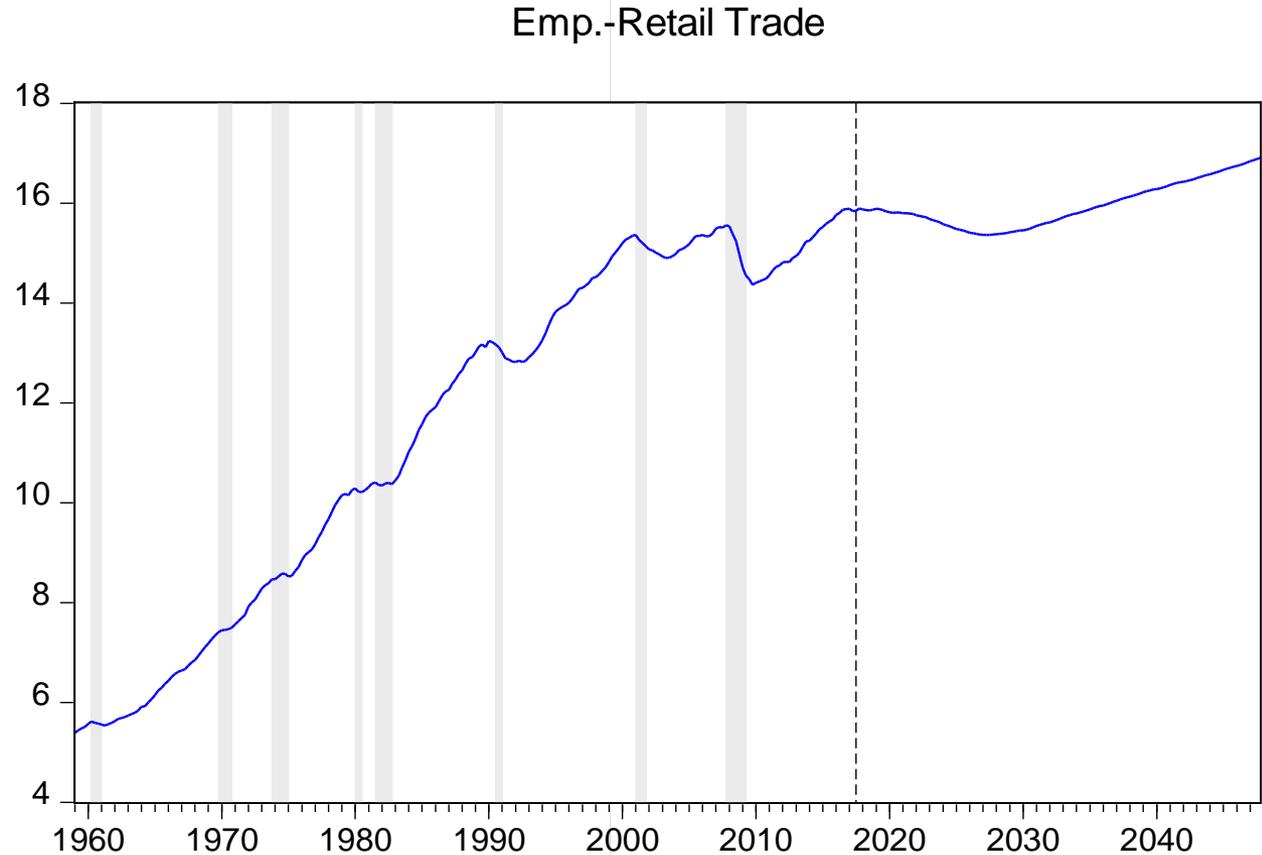
Share of manufacturing jobs stands at 8.5% today.

Expect job share for manufacturing to fall to 6.9% of all nonfarm jobs



U.S. Retail Jobs

Online sales expected to carve into brick and mortar retail sales ... leading to an initial decline and then to a stagnant retail job trend

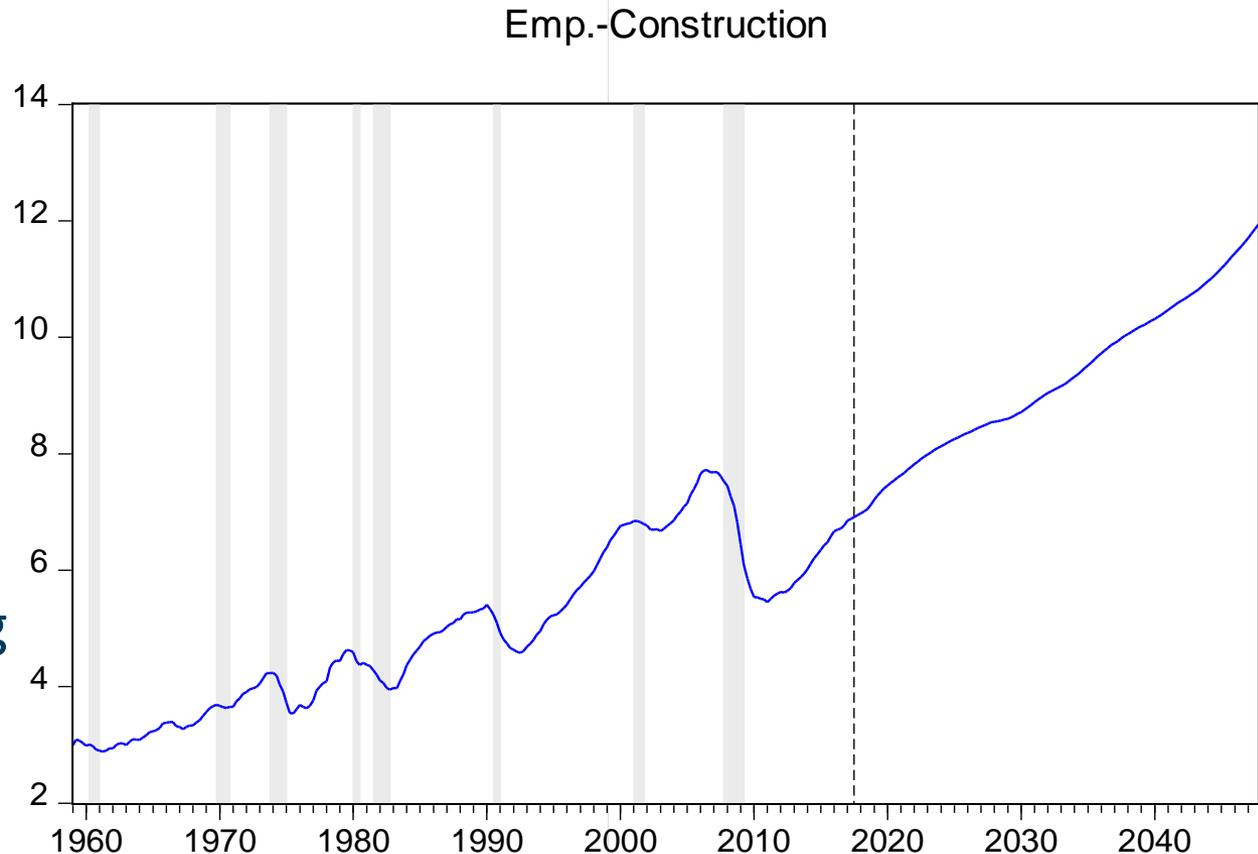


U.S. Construction Jobs

Construction sector starting to slow

Weakness expected to be temporary

Construction jobs continue to rebound, eventually surpassing pre-recession peak





Metro

Metro Regional Long-term Forecast Outlook

November 2017 peer reviewed
draft

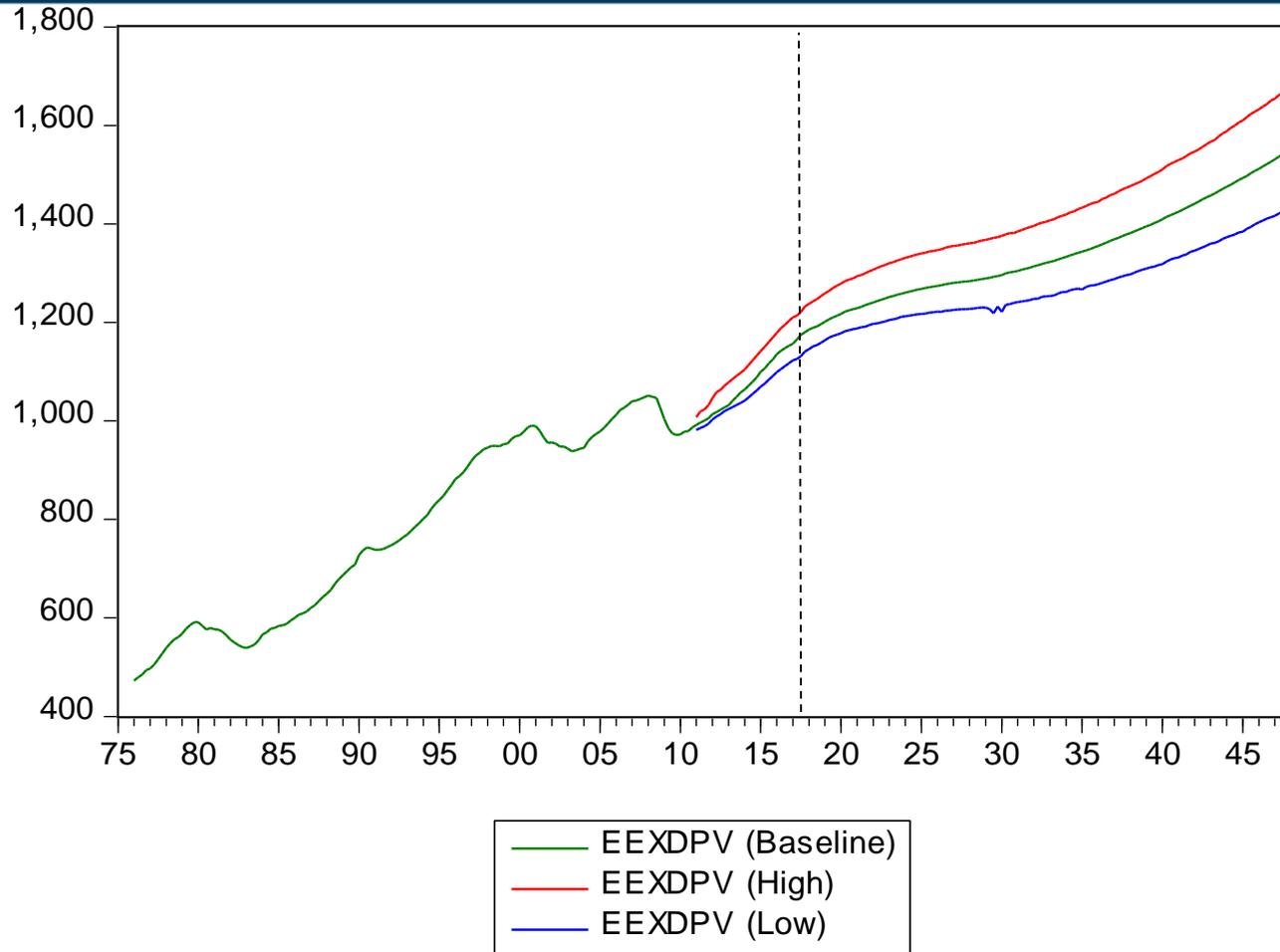
Job Forecast Accounts for Uncertainty

(Employment 2015: 1,111,900 Baseline 2040 Forecast: 1,432,300)

Forecast for MSA nonfarm payroll employment

REM derives possibility of high or low growth from a dynamic forecast that varies inputs across their historic observed range

Interval above/below baseline is roughly 2 standard deviations

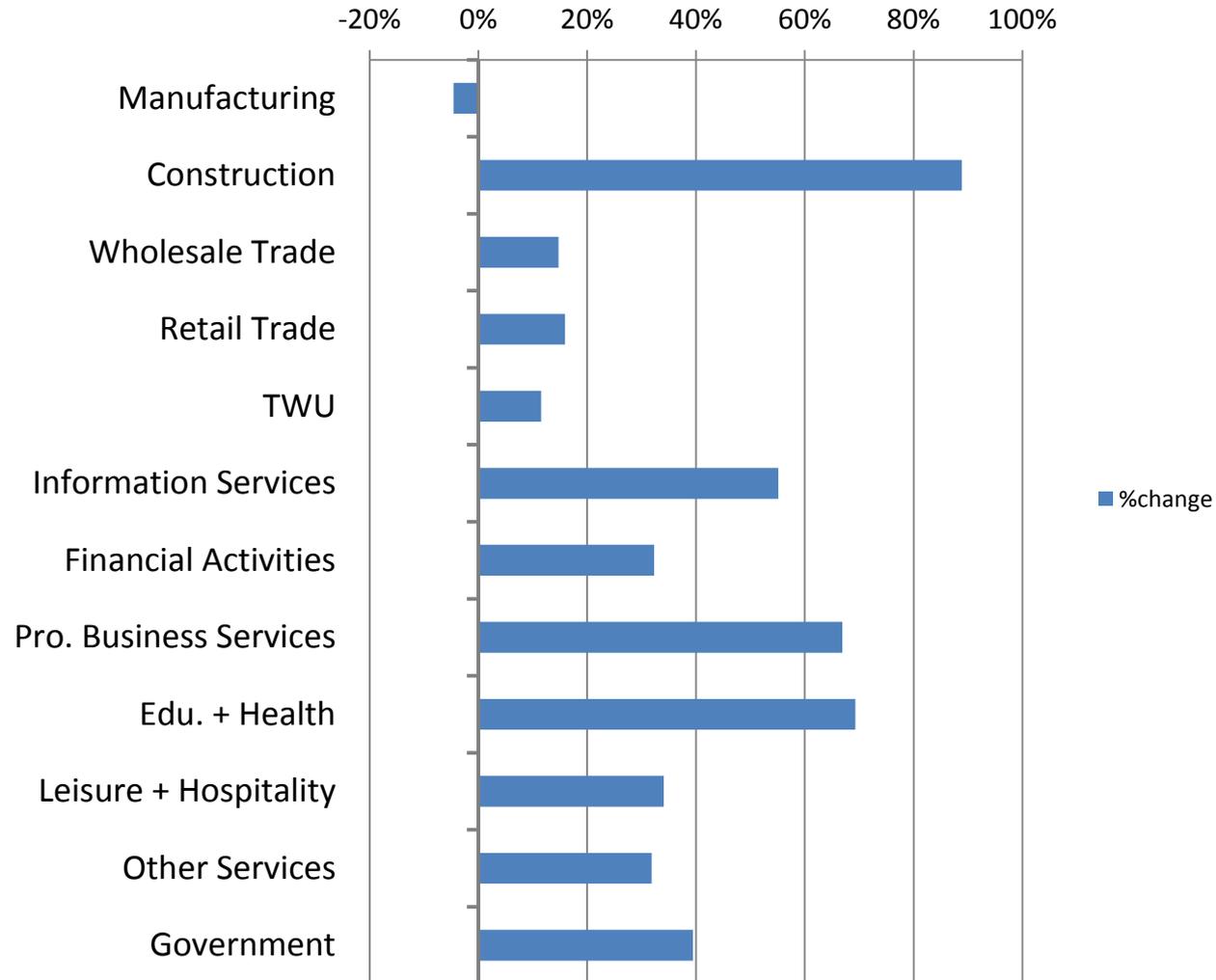


MSA Baseline Employment Projections

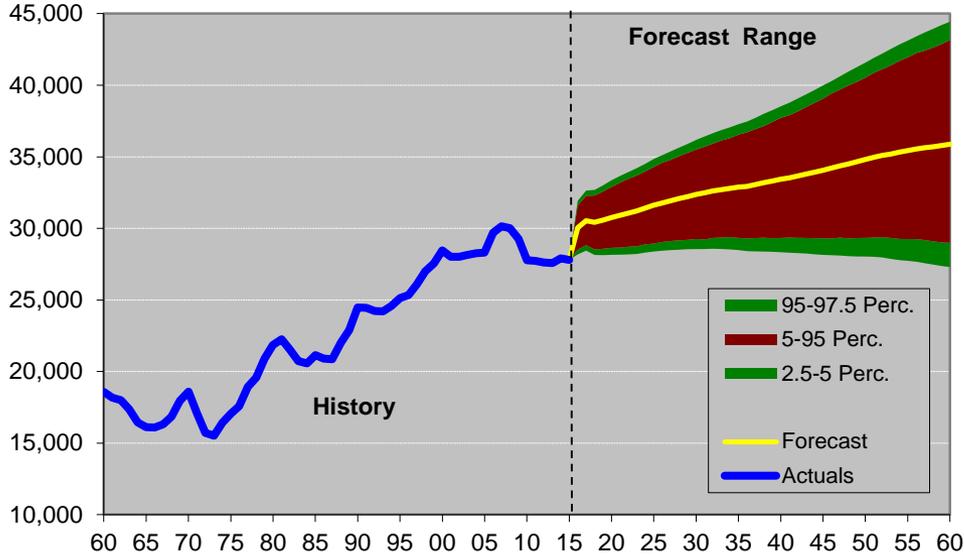
Chart shows payroll employment growth divided amongst a dozen major sectors.

Sector-level job growth between 2015 and 2047

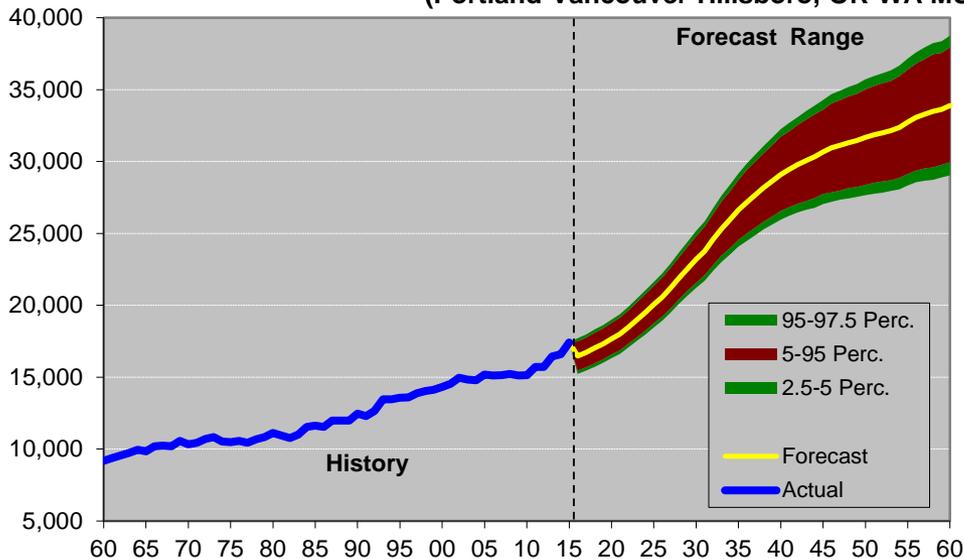
40



2017-2060 Live Birth Projection (Portland-Vancouver-Hillsboro, OR-WA MSA)



2013-2060 Mortality Projection (Portland-Vancouver-Hillsboro, OR-WA MSA)



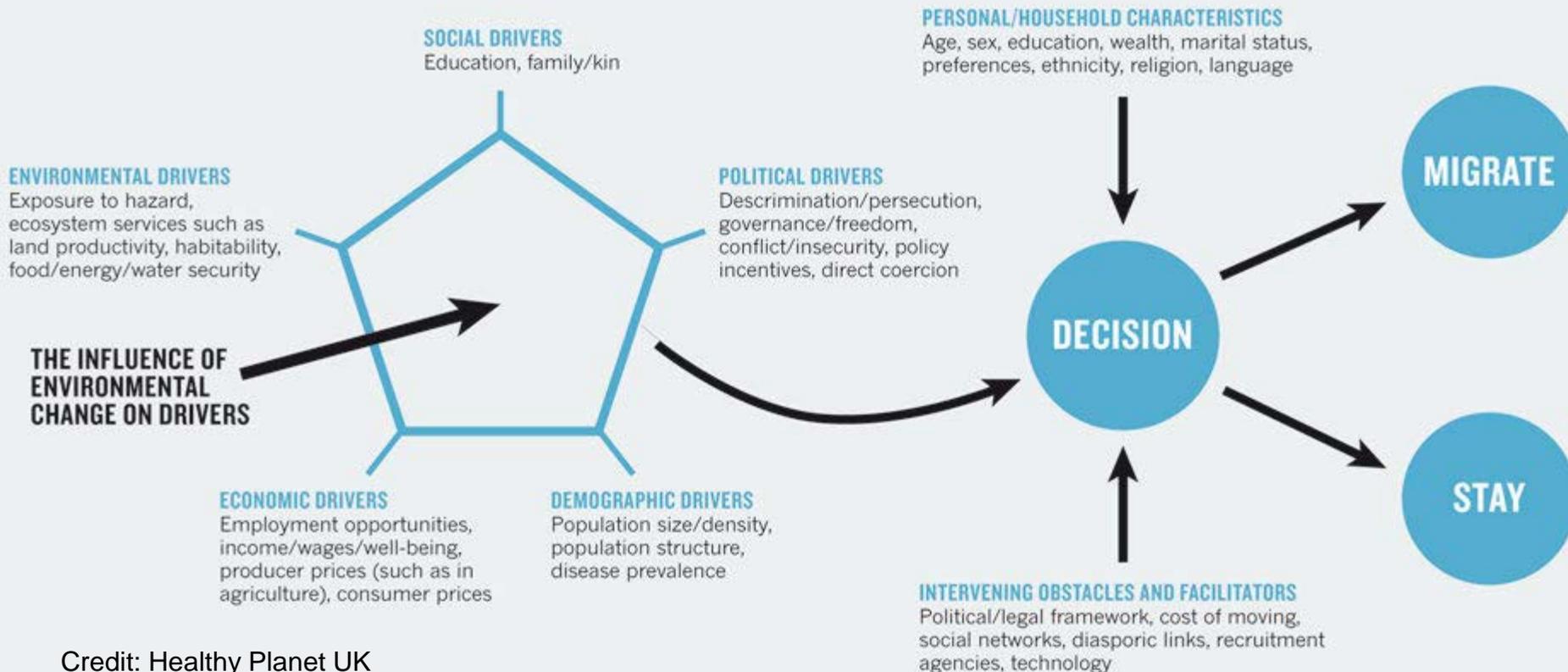
Population change has several components:

Birth,
Mortality,
Migration

Migration Has Many Drivers

THE DRIVERS OF MIGRATION

Many factors influence whether a person or family will migrate. Their effects are closely intertwined, so it makes little sense to consider any of them in isolation.



Migration Has Most Uncertainty

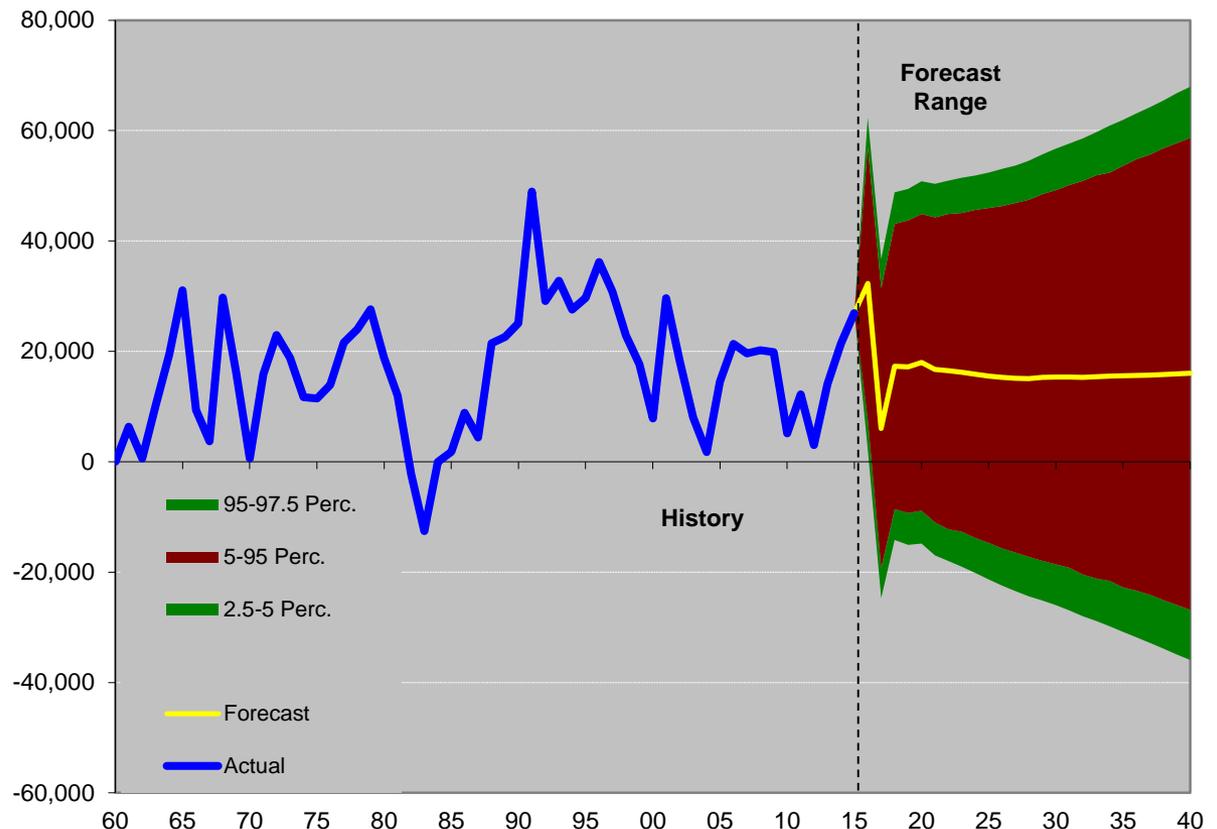
Portland MSA

Uncertainty in MSA net migration forecast large due to historical oscillations

(Uncertainty determined by dynamic simulation the model assuming normal distribution of standard errors for forecast inputs.)

46

2017-2040 Net Migration Projection
(Portland-Vancouver-Hillsboro, OR-WA MSA)

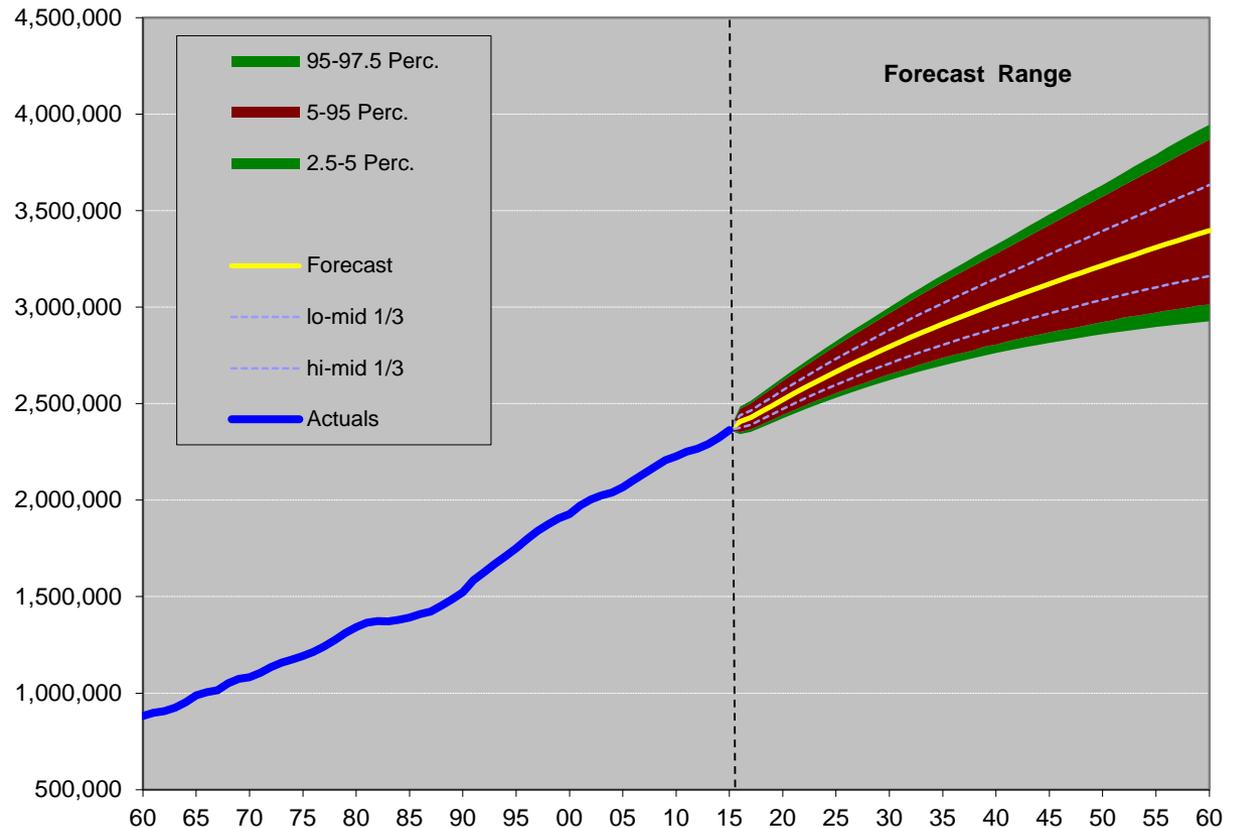


Metro Region Population Forecast

(Population estimate 2015: 2,362,700 Baseline Forecast 2040: 3,046,700)

%APR	Hi	Med	Lo
60-70		2.1	
70-80		2.2	
80-90		1.3	
90-00		2.4	
00-10		1.4	
10-20	0.93	1.25	1.57
20-30	0.83	1.04	1.23
30-40	0.56	0.78	0.95
40-50	0.41	0.63	0.84
50-60	0.31	0.55	0.77

2017-2060 Population Forecast
(Portland-Vancouver-Hillsboro, OR-WA MSA)



Metro Regional Baseline Forecast Summary, 7-County MSA

	2015	2040
Population	2,362,700	3,046,700
Employment	1,111,900	1,432,300

Questions?

Contact: Dennis Yee
(dennis.yee@oregonmetro.gov)



Arts and events
Garbage and recycling
Land and transportation
Oregon Zoo
Parks and nature

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