

Council work session agenda

Tuesday, April 17, 2018

2:00 PM

Metro Regional Center, Council Chamber

2:00 Call to Order and Roll Call

2:05 Chief Operating Officer Communication

Work Session Topics:

2:10 FY 2018-19 Budget Discussion [18-4996](#)

Presenter(s): Martha Bennett, Metro
Tim Collier, Metro

Attachments: [Work Session Worksheet](#)
[FY 2018-19 Councilor Amendment Form](#)
[FY 2018-19 Council Budget Review Calendar as of 3-27-2018](#)

3:10 2018 Urban Growth Management Decision: Trends Behind [18-4994](#)
Regional Population and Employment Growth

Presenter(s): Ted Reid, Metro
Jeff Frkonja, Metro
Dennis Yee, Metro
Sheila Martin, Portland State University
Tom Potiowsky, Portland State University
Bill Reid, PNW Economics

Attachments: [Work Session Worksheet](#)
[Regional Forecast Summary](#)
[2018 UGM Decision: Engagement and Process Timeline](#)

4:10 Metro Attorney Communication

4:20 Councilor Communication

4:30 Adjourn

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Ogeysiiska takooris la'aanta ee Metro

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សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬស្នើសុំទទួលបានកាតបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ www.oregonmetro.gov/civilrights។
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃធ្វើការ) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក។

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Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

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FY 2018-19 Budget Discussion

Work Session Topics

Metro Council Work Session
Tuesday, April 17, 2018
Metro Regional Center, Council Chamber

METRO COUNCIL

Work Session Worksheet

PRESENTATION DATE: April 17, 2018

LENGTH: 90 minutes

PRESENTATION TITLE: FY 2018-19 Budget Discussion

DEPARTMENT: Finance and Regulatory Services

PRESENTER(S): Martha Bennett, Chief Operating Officer
Tim Collier, Director of Finance and Regulatory Services

WORK SESSION PURPOSE & DESIRED OUTCOMES

Purpose: The purpose of the work session is to provide an opportunity for Councilors to discuss the FY 2018-19 Proposed Budget with the COO and other Councilors; to seek additional information on specific aspects of the budget proposal and to request additional information from staff.

TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

The FY 2018-19 Budget was released to the Council on March 29, 2018 and officially proposed by the Chief Operating Officer in her capacity as the Budget Officer to the Council sitting as Budget Committee on Thursday, April 12, 2018. It is scheduled to be approved on Thursday, May 3, 2018. Councilor amendments to the budget are due to Financial Planning no later than Tuesday, May 22, 2018 by 10:00 a.m. Discussion on the amendments is scheduled for Tuesday, June 12, 2018 with Council consideration and vote on Thursday, June 14, 2018 and final adoption of the budget on June 21, 2018. In addition, there are two opportunities for Councilors to submit written questions on the budget.

A copy of the FY 2018-19 Council Budget Review Key Dates and Deadlines as well as a copy of the Council Budget Amendment form is attached. Both items were also emailed to the Councilors and Council Policy Coordinators by Lisa Houghton on March 28th.

Councilors will also be provided with a Two-year Summary of Special Appropriations and a Ten Year History of the Council Opportunity Account at the April 17th Council Work Session.

QUESTIONS FOR COUNCIL CONSIDERATION

- Is additional information needed on any aspect of the budget proposal?
- Are there anticipated amendments that the Council wishes to discuss at this time?

PACKET MATERIALS

- Would legislation be required for Council action Yes
- If yes, is draft legislation attached? No
- What other materials are you presenting today?
 - Memo to Council
 - Two Year Summary of Special Appropriations (to be provided at work session)
 - Ten Year History of the Council Opportunity Account (to be provided at work session)

**FY 2018-19 Council Proposals
For Budget Amendment Discussion**

Councilor	#
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Enter in the information under appropriate area. Please delete the descriptions under each header if additional space is needed.

Short Title

Concise Description

Please describe the proposal, sufficient in scope that the cost and/or level of effort can be evaluated.

Objective

Clear statement of what this proposal is intended to accomplish.

What is the desired outcome? How will you tell if the proposal reaches the desired outcome?

Duration (put an 'x' in the appropriate line, for specific length write in the length)

_____ One time

Specific length: _____

_____ On-going

Cost Estimate

How much are you willing to spend to achieve your desired outcome? What is the estimated cost or effort to implement this proposal? Give as much information about the cost as you can. Categories of expense (staffing, number of positions, outside services, necessary equipment) are helpful; line item detail is not required. Does this proposal generate revenue now? In some later period?

Funding Options

How will you fund this proposal? Sources might include:

- a. Redeployment or elimination of existing effort by reassigning staff or eliminating an equivalent dollar amount from the proposed operating budget (be specific);
- b. Use of one-time money from Council Opportunity Account (already fully committed to Regional Investment Strategy for FY 18-19);
The five-year plan anticipates that the Opportunity Fund will be funded each year. Committing the fund now may limit ability to respond to new opportunities that occur during the year.
- c. Use of one-time money from a specified reserve.
This option follows the financial policies of using one-time money to fund one-time (not permanent) expenses. Funding for multi-year proposals would all come from this year's reserves. Depending on the chosen reserve, this may require replenishing the reserve next year under the "pay yourself first" principal for maintaining specified reserves.

Relationship to other programs

How does this proposal relate to, enhance or complement existing programs or projects?

Stakeholders

Who will be affected, positively or negatively, by this proposal? What known groups or coalitions will have interest in this?

FY 2018-19 Council Budget Review Key Dates and Deadlines

Color Key:

Financial Planning key actions or dates	Chief Operating Officer deadlines or key actions
Council budget retreats, work sessions, meetings or key action dates	Department deadlines

Thursday March 29, 2018	Release Proposed Budget to Council in electronic format for individual review (no deliberation of proposal allowed until April 12th)
Thursday April 5, 2018 COB	Councilor questions (first round) due to Financial Planning
Thursday April 12, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4873 Chief Operating Officer acting as Budget Officer presents Proposed Budget and Budget Message to the Metro Council acting as Budget Committee
Thursday April 12, 2018 COB	Department responses to Councilor questions due to Financial Planning (first round)
Monday April 16, 2018 Afternoon	Distribute responses to Councilor questions on budget (first round)
Monday April 16, 2018 COB	Councilor questions on budget due to Financial Planning (second round)
Tuesday April 17, 2018 2:00 p.m.	BUDGET WORK SESSION: Discussion of budget. Review process and calendar, Councilor questions, Councilor discussion, Council work session
Friday April 20, 2018 Noon	Department responses to Councilor questions due to Financial Planning (second round)
Monday April 23, 2018 Afternoon	Distribute responses to Councilor questions on budget (second round)
Tuesday April 24, 2018 2:00 p.m.	BUDGET WORK SESSION (if needed): Discussion of budget. Review process and calendar, Councilor questions, Councilor discussion, Council work session
Thursday May 3, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4873 Council approves budget for transmittal to the TSCC
Tuesday, May 15, 2018	Deadline to file budget with the TSCC
May 16 – June 7, 2018	TSCC public comment period (minimum 20 days)
Monday May 21, 2018 COB	Deadline for submittal of final department substantive and technical amendments <i>Amendments after approval are subject to limitations of Oregon Budget Law</i>
Tuesday May 22, 2018 by 10:00 a.m.	Deadline for submittal of Councilor amendments to the budget <i>Amendments after approval are subject to limitations of Oregon Budget Law</i>
Thursday, June 7, 2018 12:30 p.m.	TSCC public hearing on Approved Budget Metro Regional Center Council Annex
Friday June 8, 2018	Release packet of final department technical amendments and Councilor amendments
Tuesday June 12, 2018 2:00 p.m.	BUDGET WORK SESSION: Discussion of Councilor amendments; Review of final technical amendments
Thursday, June 14, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4874 Council considers and votes on amendments to budget
Tuesday June 19, 2018 2:00 p.m.	BUDGET WORK SESSION (if needed): Additional discussion of Councilor amendments
Thursday, June 21, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4874- final action taken Council adopts budget
July 1, 2018	Budget Effective
July 13, 2018	Deadline to file tax levy information with TSCC & Counties (July 14 th is Saturday)

**2018 Urban Growth Management Decision: Trends Behind
Regional Population and Employment Growth**

Work Session Topics

Metro Council Work Session
Tuesday, April 17, 2018
Metro Regional Center, Council Chamber

METRO COUNCIL
Work Session Worksheet

PRESENTATION DATE: April 17, 2018

LENGTH: 60 minutes

PRESENTATION TITLE: 2018 Urban Growth Management Decision: Trends Behind Population and Employment Growth

DEPARTMENT: Planning and Development, Research Center

PRESENTER(S): Ted Reid, Principal Regional Planner
Jeff Frkonja, Director, Metro Research Center
Dennis Yee, Metro Economist
Sheila Martin, Director, PSU Institute of Portland Metropolitan Studies
Tom Potiowsky, Director, PSU Northwest Economic Research Center
Bill Reid, Principal, PNW Economics

WORK SESSION PURPOSE & DESIRED OUTCOMES

Purpose: Provide Council with background on the draft regional population and employment forecast that will be released in the 2018 Urban Growth Report in late June 2018.

Outcome: The Council has an opportunity to hear outside perspectives on Metro's regional forecast and the trends that drive the forecast.

TOPIC BACKGROUND & FRAMING THE WORK SESSION DISCUSSION

Metro and its partners produce the regional population and employment forecast to inform the Metro Council's urban growth management decisions.

The Metro Council last considered a regional forecast in the 2015 urban growth management decision. At that time, the Metro Council adopted the 2015 forecast and directed staff that it intended to make its next urban growth management decision in 2018. Making a growth management decision in 2018 requires an updated regional forecast. The new range forecast will be documented in the draft 2018 Urban Growth Report, which will be released in late June.

Metro staff facilitated a peer review of the new regional forecast. A couple of the external participants in this work session discussion participated in the forecast peer review process.

This discussion is intended to illuminate some of the trends underlying the updated draft forecast, such as demographic changes, migration flows, and economic conditions after the Great Recession. After a brief presentation by Metro staff, councilors will have the opportunity to engage in a discussion with our guest speakers

QUESTIONS FOR COUNCIL CONSIDERATION

Does the Council have any questions for Metro staff or the guest speakers?

PACKET MATERIALS

- Would legislation be required for Council action ☐Yes ☒No
- If yes, is draft legislation attached? ☐Yes ☐No
- What other materials are you presenting today? Draft 2018-2038 Regional Forecast Quick Reference and 2018 Urban Growth Management Decision: Engagement and Process Timeline.

This document summarizes the draft Metro 2018-2038 Regional Growth 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 7-county Metropolitan Statistical Area (MSA) from 2015 - 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 7-county MSA between 2015 and 2045)

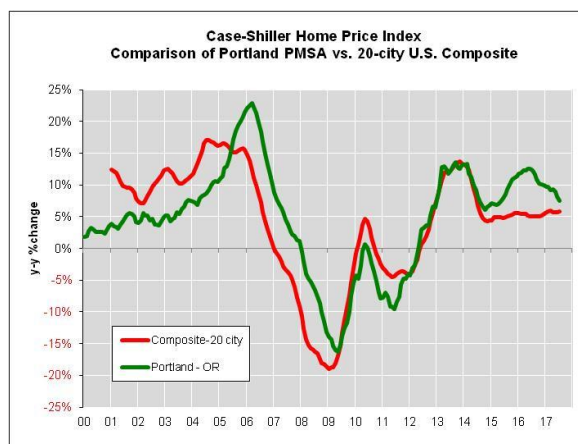
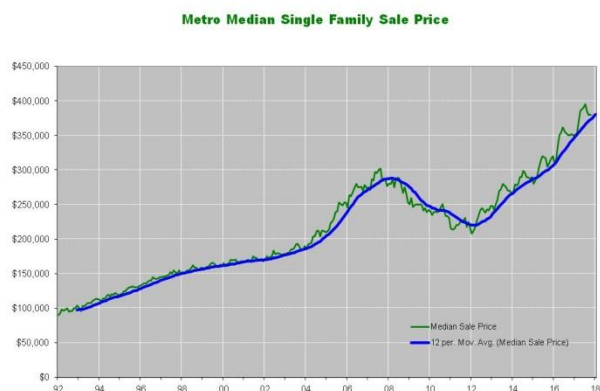
State of the Region

Annual 7-county MSA Population and MSA Employment

	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
Population	2,265,725 (0.7%)	2,291,650 (1.1%)	2,324,535 (1.4%)	2,362,655 (1.6%)	2,407,540 (1.9%)
Employment	1,020,400 (2.2%)	1,044,800 (2.4%)	1,076,000 (3.0%)	1,111,900 (3.3%)	1,144,500 (2.9%)

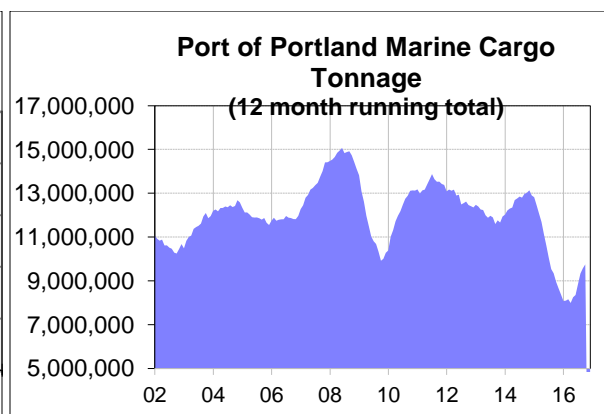
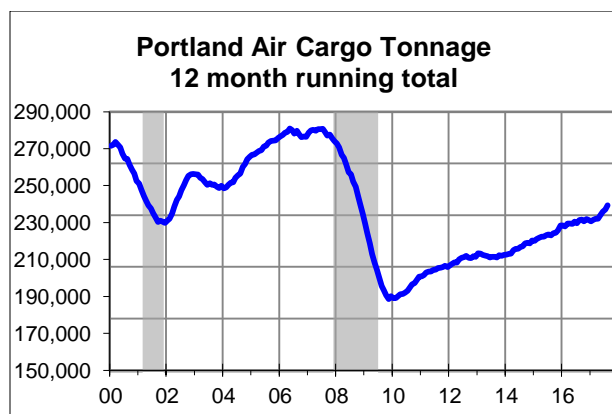
Source: PSU and BLS (annual growth rate in parenthesis)

- ❖ The Great Recession is now well past. Job and population growth have returned to pre-recession rates in recent years.
- ❖ National, state and regional unemployment rates are approaching near-full employment – meaning that anyone looking for a job is likely able to find a job, but may mean a shortage for businesses looking to hire.
- ❖ Strong real estate prices (charts below) indicate a growing economy with room to expand in a key blue-collar employment sector – construction. Surveys of local apartments show low vacancy rates and higher year-over-year rents.
- ❖ Prices for homes are similarly showing strong appreciation – another indicator of a robust and healthy economy.

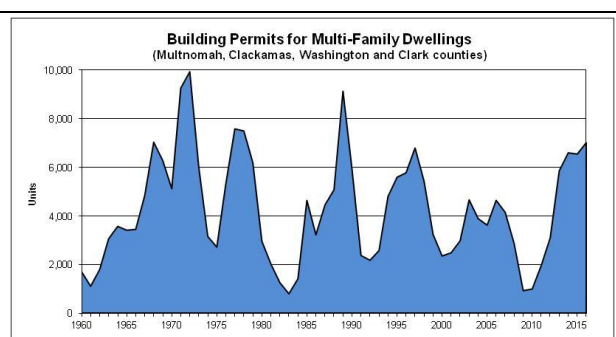
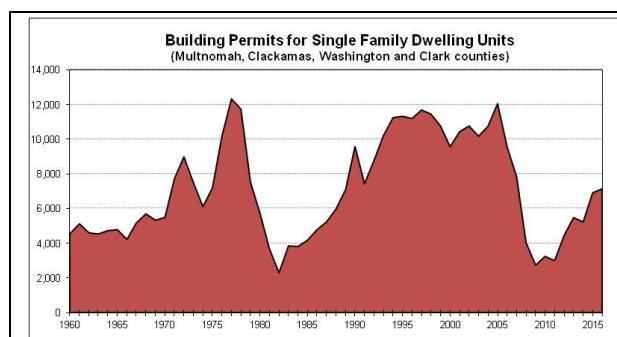


Sources: *Regional Multiple Listing Service, Case-Schiller*

- ❖ 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*



Source: *U.S. Census (Permits include Clackamas, Multnomah, Washington and Clark)*

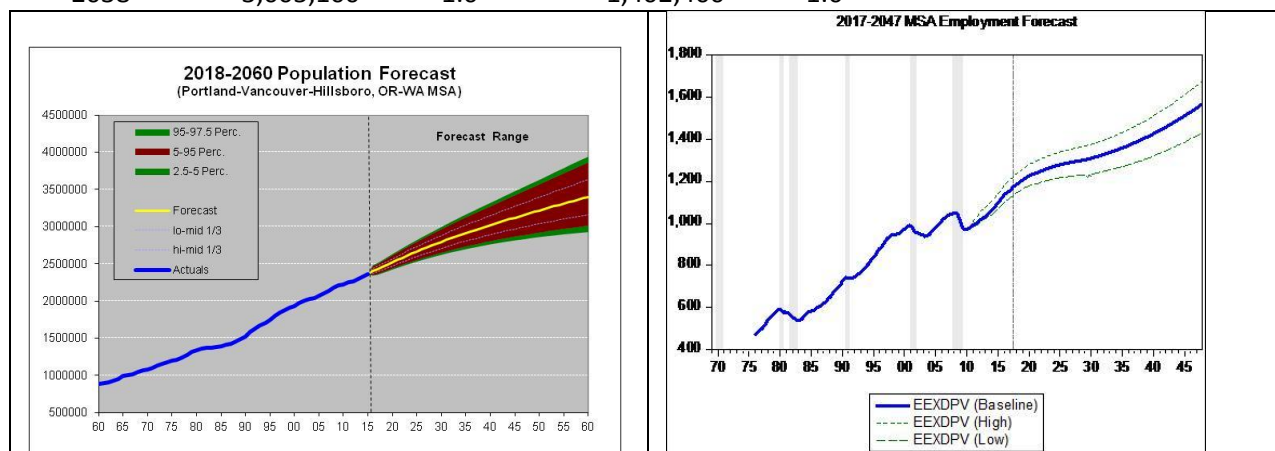
- ❖ Average Single-family permits issued in last 3 years = 6,400 units/yr; 20 year avg. = 8,050 units/yr
- ❖ Average Multifamily permits issued in last 3 years = 6,700 units/yr; 20 year avg. = 4,100 units/yr

Regional 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

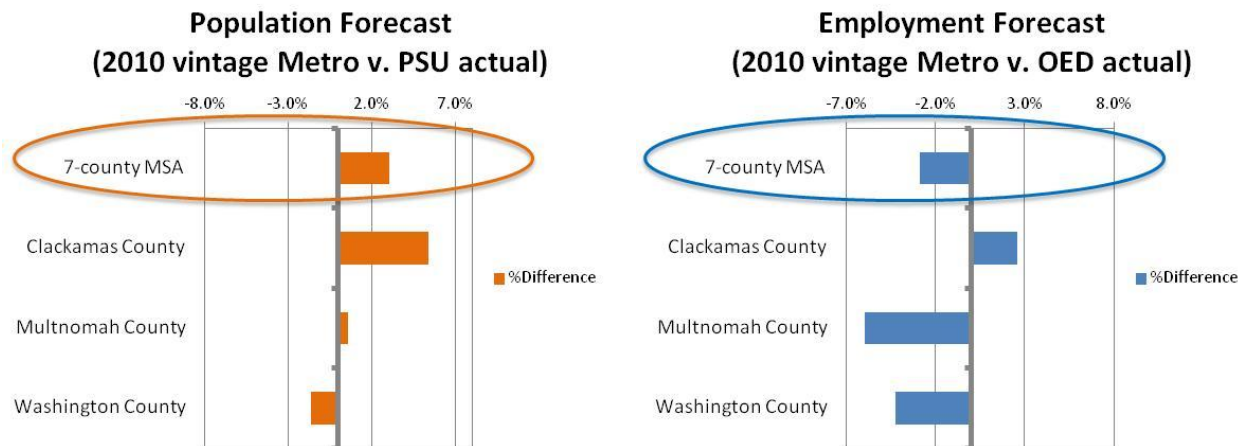
Year	Population	APR%	Employment	APR%
2015	2,362,655	1.6	1,111,900	3.3
2016	2,407,540	1.9	1,144,450	2.9
2017	2,443,900	1.5	1,169,300	2.2
2018	2,480,800	1.5	1,193,500	2.1
2019	2,513,500	1.3	1,214,250	1.7
2020	2,545,400	1.3	1,230,200	1.3
2038	3,005,100	1.0	1,402,400	1.0



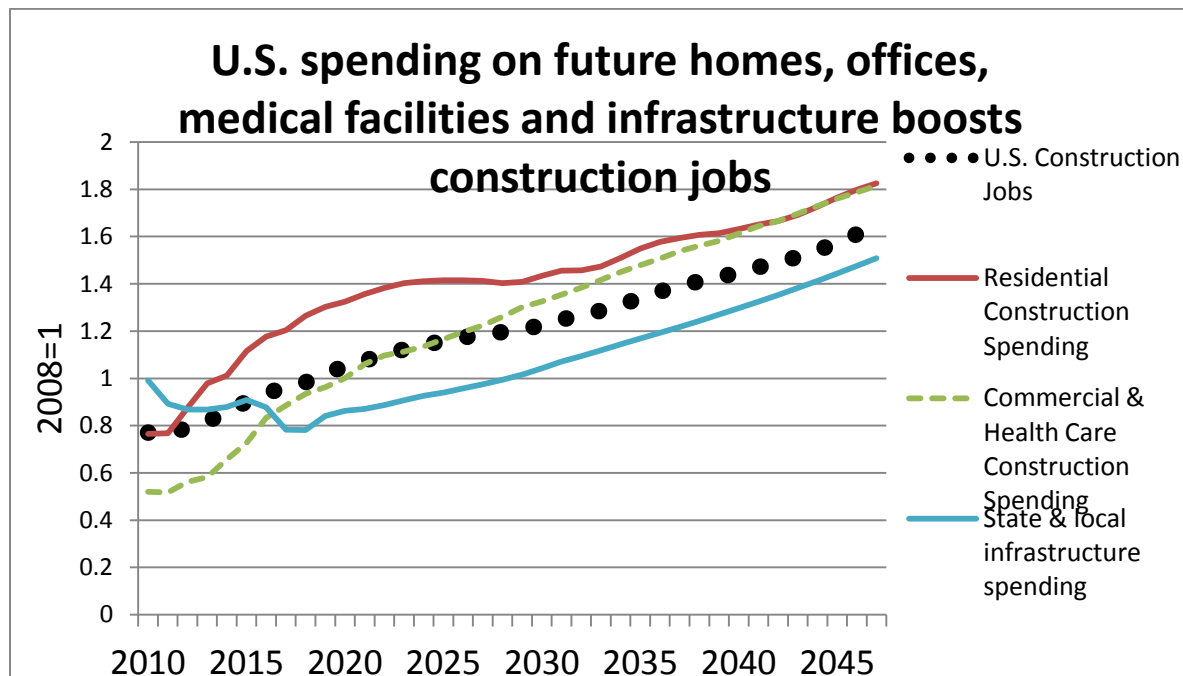
Source: history = {Census/ PSU and BLS; forecast = Metro, Research Center, November 2017}

Forecast Comparison (Metro November 2017 Forecast v. Metro November 2014 Forecast)

Total Population	2015	2020	2025	2030	2035	2040
(in 1,000's)						
Metro (2017 vintage)	2,362.7	2,545.4	2,691.5	2,822.5	2,940.4	3,046.7
Metro (2014 vintage)	2,342.5	2,519.2	2,671.8	2,814.1	2,937.9	3,052.1
% diff	0.9%	1.0%	0.7%	0.3%	0.1%	-0.2%
Total Employment	2015	2020	2025	2030	2035	2040
(in 1,000's)						
Metro (2017 vintage)	1,111.9	1,230.2	1,281.4	1,313.2	1,363.1	1,432.3
Metro (2014 vintage)	1,100.0	1,228.1	1,311.6	1,399.8	1,484.5	1,571.3
% diff	1.1%	0.2%	-2.3%	-6.2%	-8.2%	-8.8%

Prior Metro Regional Forecast Accuracy**Review of Metro 2017 Regional Forecast and NERC November 2017 Forecast**

- Both Metro and NERC economists agree that the differences between the two respective forecasts are not significant.
- Both concur that sector level employment differences are also not large
- Both forecasts project construction to be the fastest industry growth sector. Both cite infrastructure development from state and federal sources along with non-residential construction as key drivers of construction in future years.



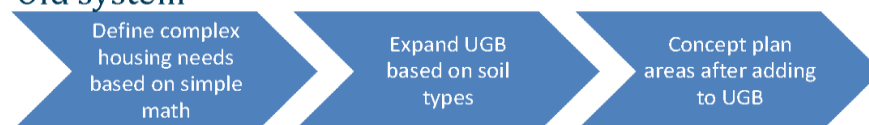
2018 urban growth management decision: engagement and process timeline

Per work program endorsed by Metro Council in February 2017

	Summer - Fall 2017	Winter 2018	Spring 2018	Summer 2018	Fall 2018
Program milestones	<div>Clarify expectations for cities</div>	<div>City letters of interest due</div>	<div>City proposals due</div>	<div>Metro COO rec., followed by MPAC rec.</div> <div>Draft Urban Growth Report</div>	<div>Council direction</div> <div>Council decision</div>
Cities proposing expansions	<ul style="list-style-type: none"> • Concept planning for urban reserves • Letters of interest due Dec. 29 		Proposals due May 31	Present proposals	
MTAC	Recommendation: clarify expectations for cities proposing residential UGB expansions		<ul style="list-style-type: none"> • Discussion: merits of city proposals • Recommendation: tech advice, if requested by MPAC 		
Peer review groups	Regional population and employment forecast MetroScope model Buildable land inventory methods and results and other model assumptions (LUTAG)		Strengths & weaknesses of city proposals (CRAG)		
MPAC	Recommendation: clarify expectations for cities proposing residential UGB expansions		<ul style="list-style-type: none"> • Discussion: merits of city proposals • Recommendation to Council 		
Public comment opportunities	City planning processes		<ul style="list-style-type: none"> • Opt-In poll • Online comment period 	Council hearings	Council hearings
Metro Council	Decision: clarify expectations for cities proposing residential UGB expansions		Discussion: merits of city proposals		<ul style="list-style-type: none"> • Direction (Sept) • Decision (Dec)

Evolution of regional growth management process

Old system



New system



Ongoing improvements to the region's urban growth management process

Protect farms and forests and make the most of what we have

- 1995: 2040 Growth Concept:
- Focus most growth in existing urban areas
 - Expand the UGB in urban reserves when needed
 - Protect industrial areas
 - Consider implications of growth in neighbor cities
- 1996: Urban Growth Management Functional Plan:
- Protections for industrial lands
 - No net loss for residential zoning
- 1997: Regional Framework Plan:
- Focus on redevelopment and infill
 - Provide housing choices
- 2010: Urban and Rural Reserves (long-term vision for urban footprint)

Take an outcomes-based approach

- 2009: Initial direction on six desired outcomes
- 2010: Formal adoption of six desired outcomes
- 2014: Climate Smart Communities Strategy
- 2016: Equity Strategy

Have a plan before expanding the UGB

- 2010: Require a concept plan before expansion
- 2011: Require additional consideration of housing affordability in concept plans

Improve technical analysis

- Ongoing: Peer review of models, methods, and forecasts
- 2009 on: Use of range forecast to acknowledge uncertainty
- 2014 on: Use of range of capacity to acknowledge uncertainty
- 2018 on: More explicit use of scenario modeling to inform growth management

Track development trends

- Periodic: Regional Industrial Site Readiness inventory
- Periodic: State of the Centers
- Periodic: Regional Snapshots
- Periodic: Urban Growth Reports

Be responsive to city proposals for UGB expansions

- 1992: Create annual opportunity for proposed non-residential expansions
- 2007: 2040 Planning and Development Grant program begins to fund local planning
- 2010: Create expedited UGB process for industrial expansion proposals
- 2017: Create mid-cycle UGB process for modest residential expansion proposals
- 2017: Clarify expectations for cities proposing residential expansions

Materials following this page were distributed at the meeting.



Metro

Metro Council Work Session

Regional Economic Forecast Overview
April 17, 2018

Urban Growth Management analytics are well underway

- 1: Regional Economic Forecast→ *Done*
- 2: Buildable Lands Inventory→ *Done*
- 3: City expansion proposals
 - Five received, Sherwood may withdraw
- 4: Allocation Forecasts→ *Underway*
 - Scenario previews to you→ *May*
 - Urban Growth Report draft→ *July*

Today we'll talk about recent trends and future growth

- State of the Region
 - Great Recession in rear view
 - Strong regional growth
 - Construction recovery
 - Rising real estate prices
- Regional Forecast
 - Peer review panel
 - Population range projections
 - Employment range projections
 - Comparison to 2014 UGR forecast

3



State of the Metro Region

Population, total

Portland MSA: home to 2.4 million residents in 2017

Population:

1.8% APR (1960-2016)

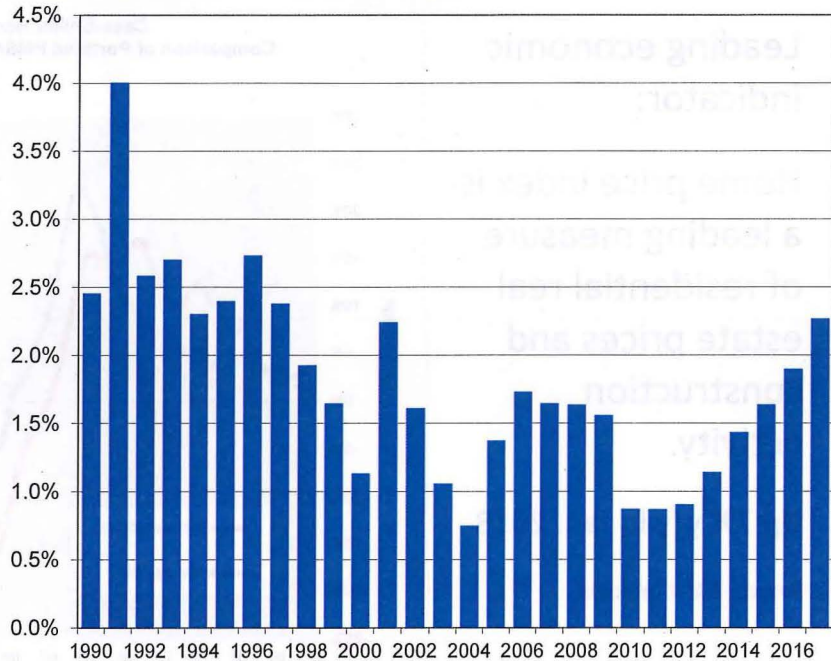
2.3% (in 2017)

Counties in the MSA

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

Source: PSU and Census

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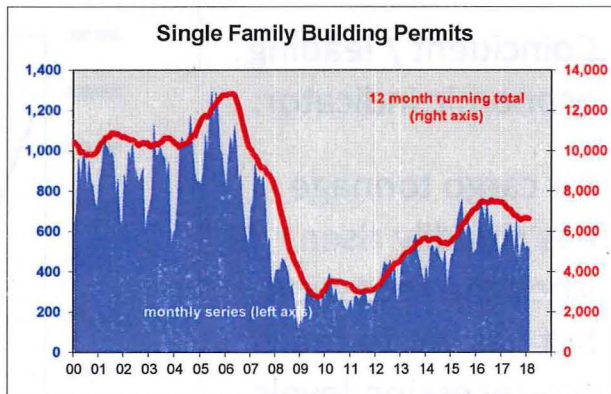
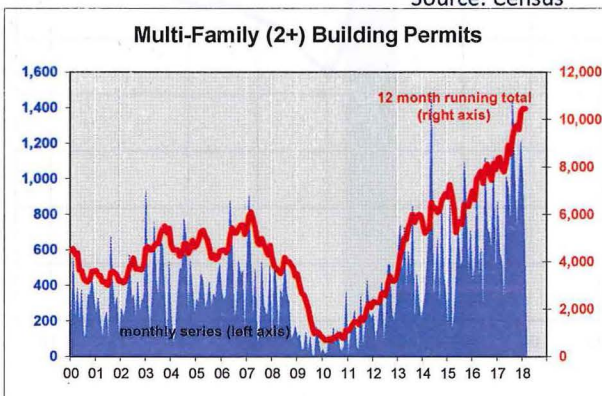
New Residential Construction Permits

Portland MSA (in thousands)

Leading construction / economic indicator:

Single Family permits slowing as y/y monthly figures are lower.

Source: Census



Multi-family permits still rising, but starting to see construction starts slow for small apartment complexes.

Case-Shiller Home Price Index

Portland MSA (pct. change year ago)

Leading economic indicator:

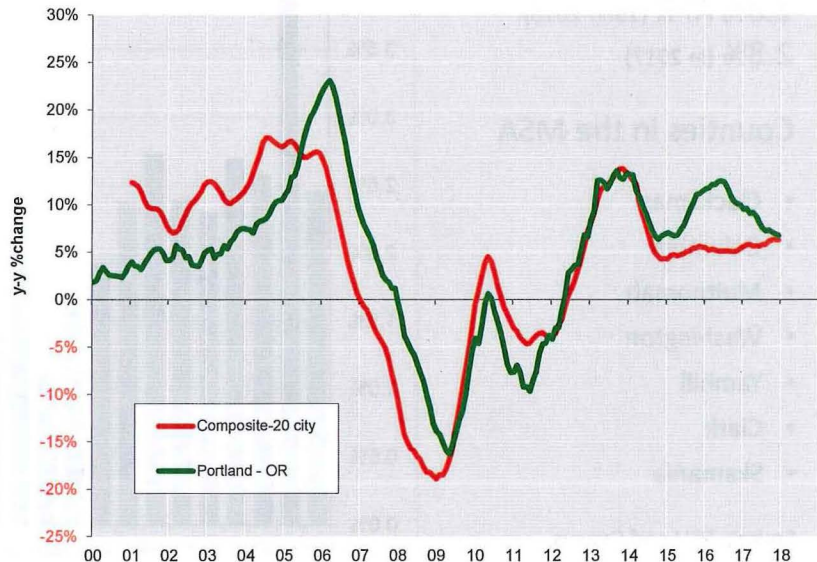
Home price index is a leading measure of residential real estate prices and construction activity.

Up 7% y/y in Jan. 2018

Source: S&P Corelogic

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Case-Shiller Home Price Index
Comparison of Portland PMSA vs. 20-city U.S. Composite



Air Cargo tonnage – PDX

(12 month running total)

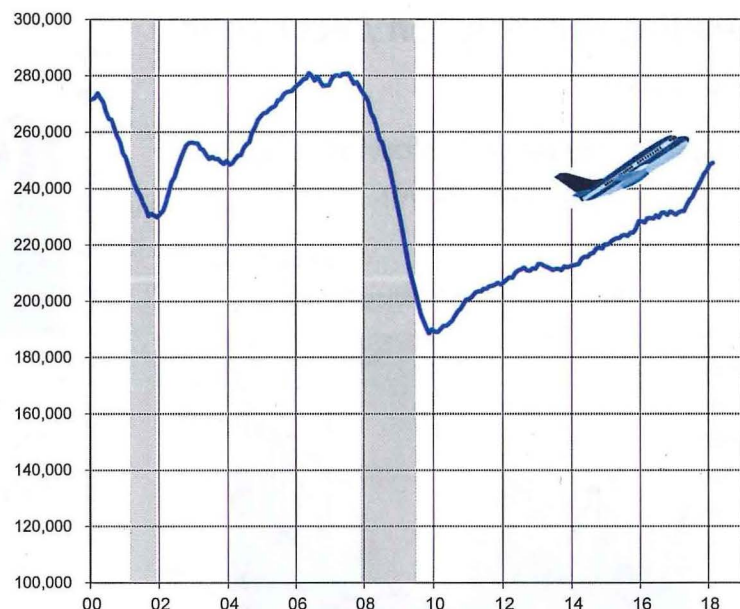
Coincident / leading economic indicator:

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

Source: Port of Portland



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Real Gross Metropolitan Product

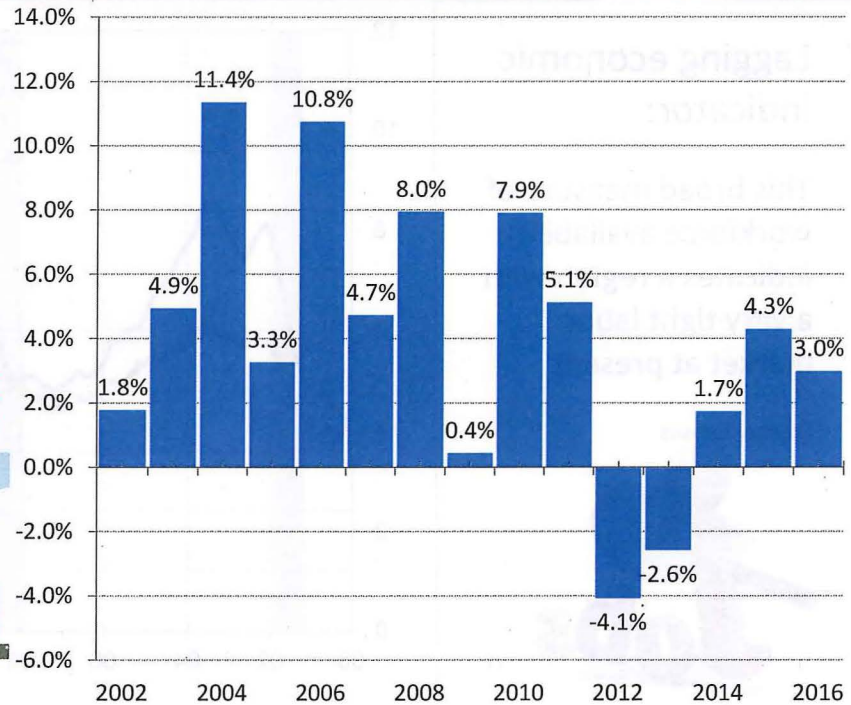
Portland MSA

U.S. Recessions:

Mar 2001 – Nov 2001

Dec 2007 – June 2009

Source: BEA and NBER



Strong jobs gains since Great Recession

Portland MSA: hosts about 1.17 million total Jobs in 2017

Sector specific job indicators:

Top growth sectors:

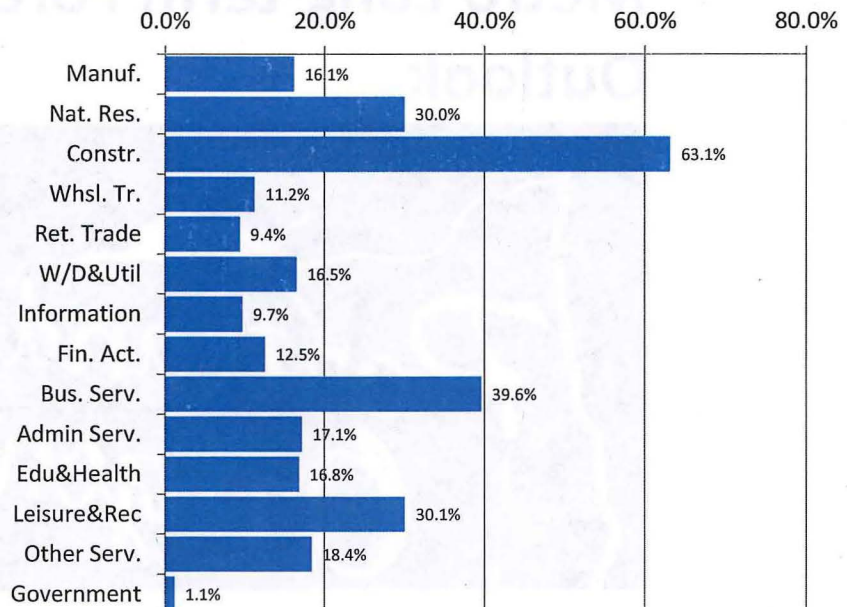
- Construction
- Business services
- Leisure & hospitality

Source: BLS



10

(pct. chg. since end of 2011)



Unemployment Rate

Portland MSA & U.S. (seasonally adjusted)

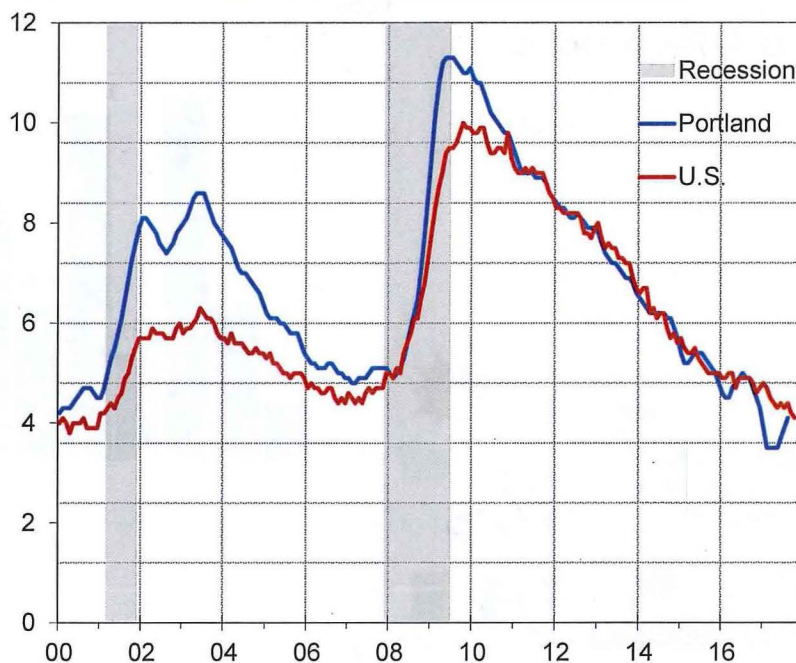
Lagging economic indicator:

This broad measure of workforce availability indicates a region with a very tight labor market at present

Source: Census



11



Metro

Metro Long-term Forecast Outlook



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, NERC



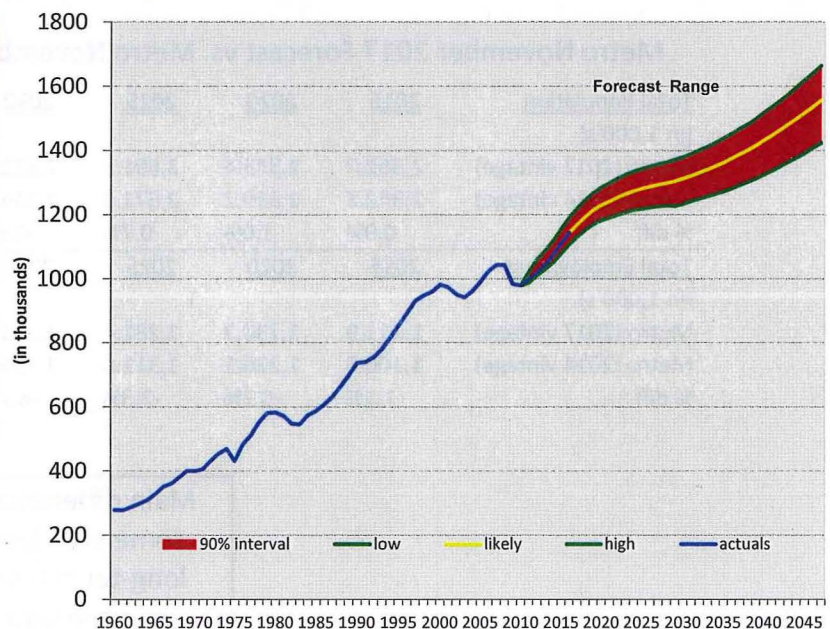
13

MSA Job Forecast & Uncertainty

Likely Employment (baseline) in 2038 = 1.4 million

	High	Likely	Low
2015		1,111.9	
2018	1,292.7	1,193.5	1,107.8
2020	1,335.9	1,230.2	1,135.3
2025	1,400.1	1,281.4	1,167.5
2030	1,440.7	1,313.2	1,182.9
2035	1,502.9	1,363.1	1,215.6
2038	1,550.7	1,402.4	1,243.3
2040	1,587.2	1,432.3	1,264.4

(in thousands)

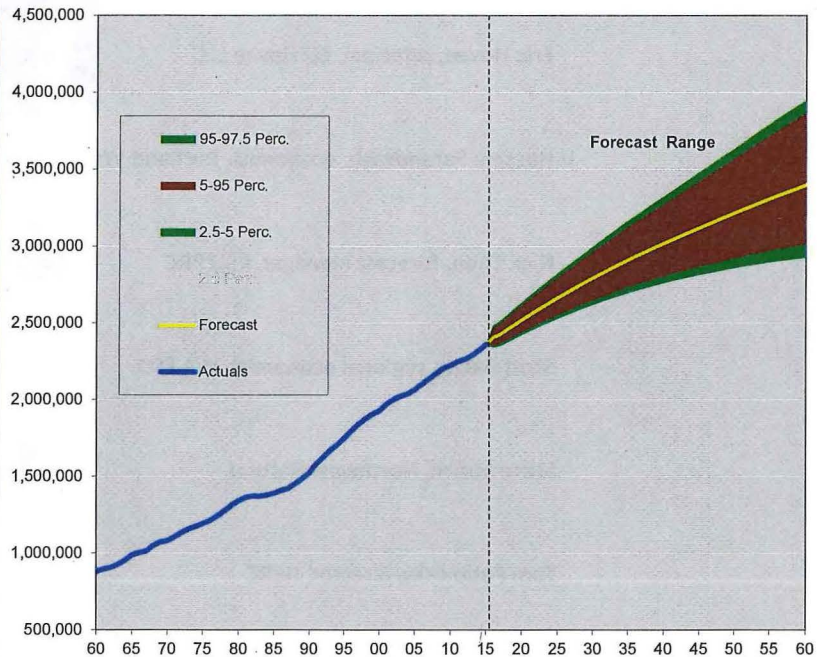


MSA Population & Uncertainty

Likely Population (baseline) in 2038 = 3.0 million

	High	Likely	Low
2015		2,362.7	
2018	2,516.4	2,480.8	2,413.6
2020	2,600.6	2,545.4	2,441.5
2025	2,775.1	2,691.5	2,554.8
2030	2,938.5	2,822.5	2,652.7
2035	3,090.1	2,940.4	2,737.9
2038	3,175.0	3,005.1	2,779.4
2040	3,229.7	3,046.7	2,806.2

(in thousands)



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Forecast Comparison: 2015 UGR v. 2018 UGR

Metro November 2017 Forecast vs. Metro November 2014 Forecast

<u>Total Population</u> (in 1,000's)	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>	<u>2040</u>
Metro (2017 vintage)	2,362.7	2,545.4	2,691.5	2,822.5	2,940.4	3,046.7
Metro (2014 vintage)	2,342.5	2,519.2	2,671.8	2,814.1	2,937.9	3,052.1
% diff	0.9%	1.0%	0.7%	0.3%	0.1%	-0.2%
<u>Total Employment</u> (in 1,000's)	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>	<u>2040</u>
Metro (2017 vintage)	1,111.9	1,230.2	1,281.4	1,313.2	1,363.1	1,432.3
Metro (2014 vintage)	1,100.0	1,228.1	1,311.6	1,399.8	1,484.5	1,571.3
% diff	1.1%	0.2%	-2.3%	-6.2%	-8.2%	-8.8%

Main difference:
somewhat less
long-term total
employment
growth

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Mitigation Forecast Uncertainty

Questions?



Metro

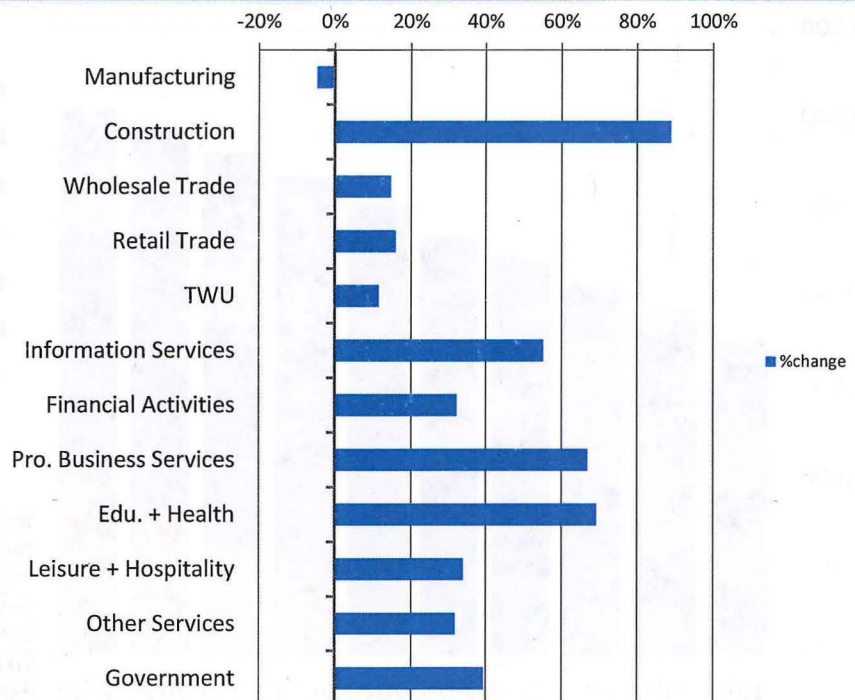
Arts and events
Garbage and recycling
Land and transportation
Oregon Zoo
Parks and nature

oregonmetro.gov

MSA Employment Projections

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

Sector-level job growth between 2015 and 2047



Migration Forecast Uncertainty

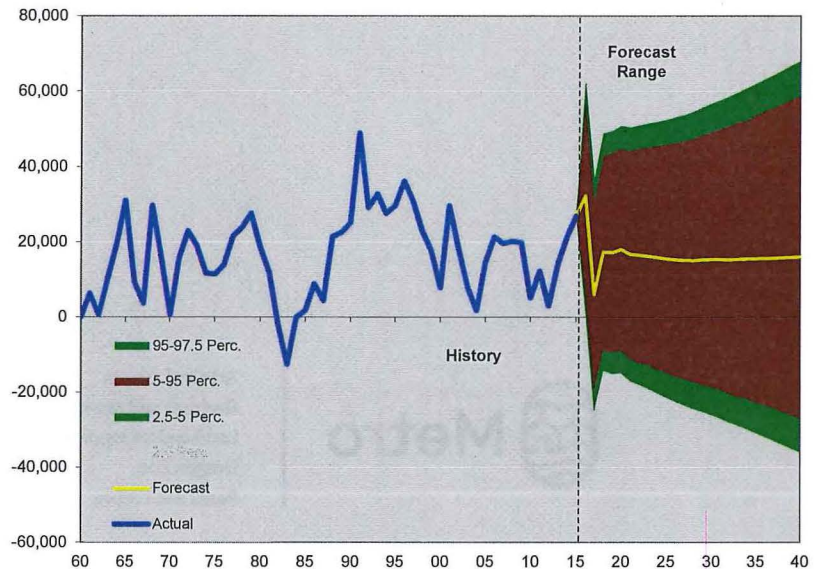
Portland MSA

“Forecast error” or uncertainty in MSA net migration forecast exceeds historical standard deviations.

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

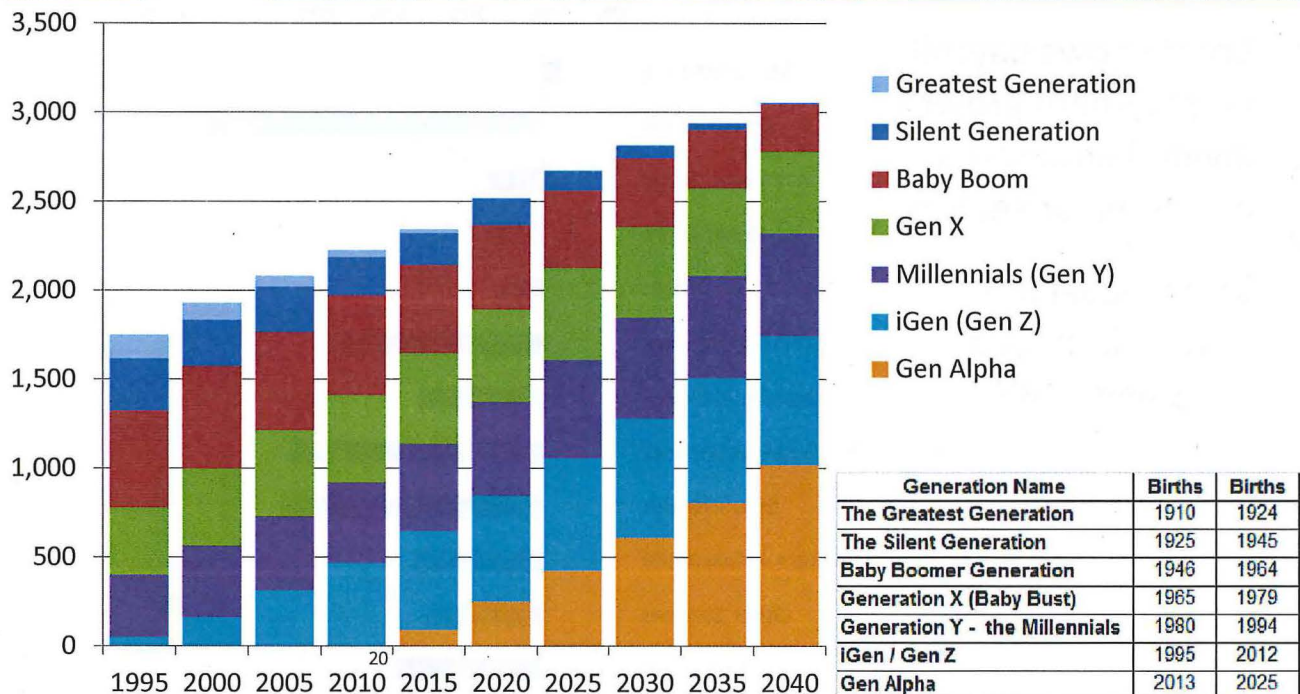
19

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



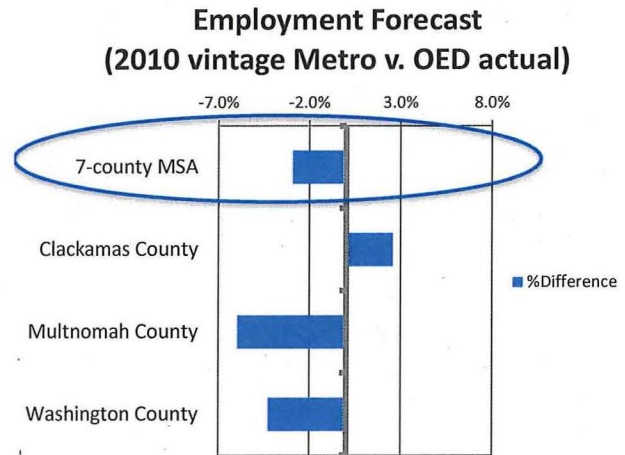
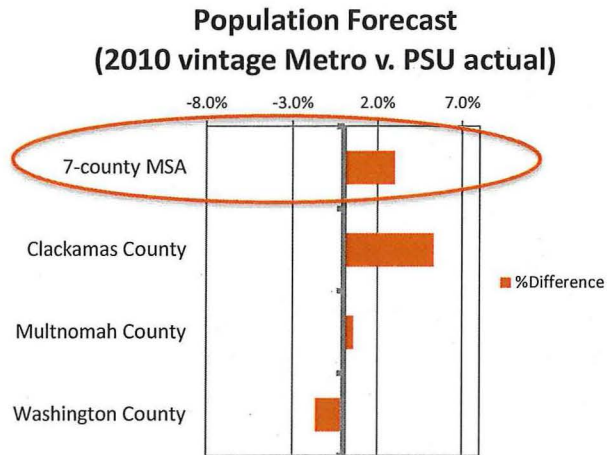
Population by Generations

Portland MSA



Forecast Accuracy – year 2015

(and MetroScope)



This document summarizes the Metro 2018-2038 Regional Growth 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)

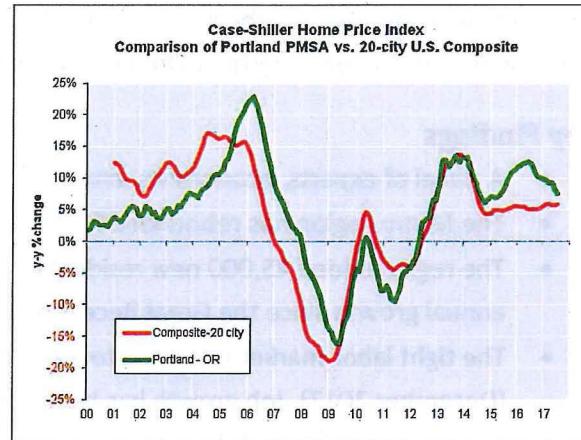
State of the Region

Annual MSA Population and MSA Employment

	<u>2012</u>	<u>2013</u>	<u>2014</u>	<u>2015</u>	<u>2016</u>
Population	2,265,725 (0.7%)	2,291,650 (1.1%)	2,324,535 (1.4%)	2,362,655 (1.6%)	2,407,540 (1.9%)
Employment	1,020,400 (2.2%)	1,044,800 (2.4%)	1,076,000 (3.0%)	1,111,900 (3.3%)	1,144,500 (2.9%)

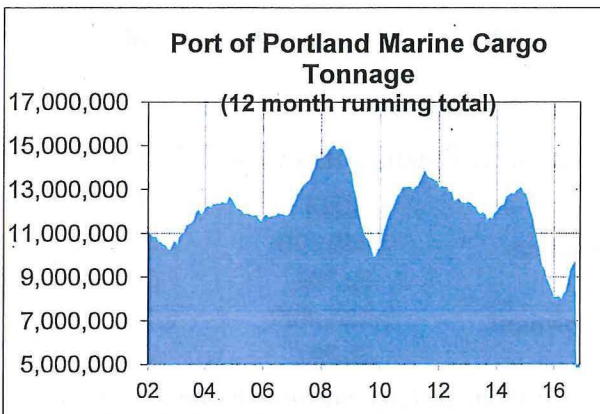
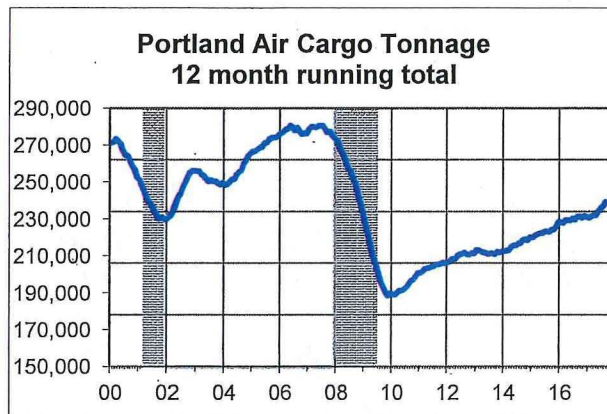
Source: PSU and BLS (annual growth rate in parenthesis)

- ❖ The Great Recession is now well past. Job and population growth have returned to pre-recession rates in recent years.
- ❖ National, state and regional unemployment rates are approaching near-full employment – meaning that anyone looking for a job is likely able to find a job, but may mean a shortage for businesses looking to hire.
- ❖ Strong real estate prices (charts below) indicate a growing economy with room to expand in a key blue-collar employment sector – construction. Surveys of local apartments show low vacancy rates and higher year-over-year rents.
- ❖ Prices for homes are similarly showing strong appreciation – another indicator of a robust and healthy economy.

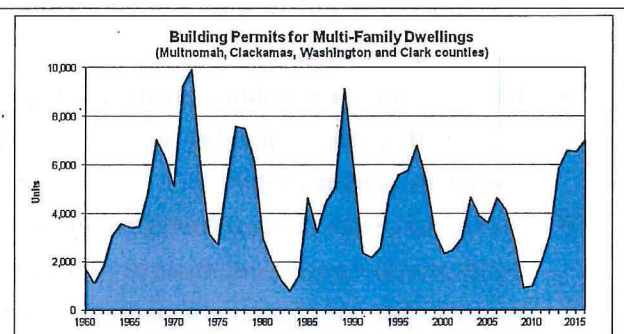
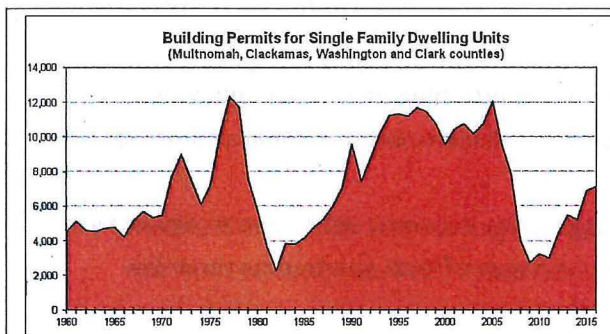


Sources: Regional Multiple Listing Service, Case-Schiller

- ❖ 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



Source: U.S. Census (Permits include Clackamas, Multnomah, Washington and Clark)

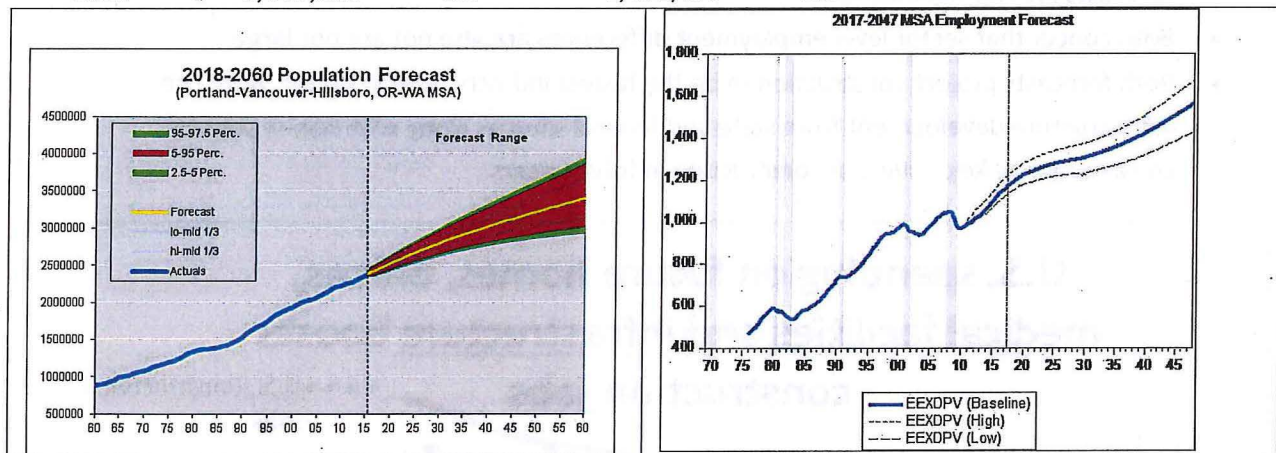
- ❖ Average SFR permits issued in last 3 years = 6,400 units/yr; 20 year avg. = 8,050 units/yr
- ❖ Average MFR permits issued in last 3 years = 6,700 units/yr; 20 year avg. = 4,100 units/yr

Regional 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	2,362,655	1.6	1,111,900	3.3
2016	2,407,540	1.9	1,144,450	2.9
2017	2,443,900	1.5	1,169,300	2.2
2018	2,480,800	1.5	1,193,500	2.1
2019	2,513,500	1.3	1,214,250	1.7
2020	2,545,400	1.3	1,230,200	1.3
2038	3,005,100	1.0	1,402,400	1.0



Source: history = {Census/ PSU and BLS; forecast = Metro, Research Center, November 2017}

Forecast Comparison (Metro November 2017 Forecast v. Metro November 2014 Forecast)

Total Population	2015	2020	2025	2030	2035	2040
(in 1,000's)						
Metro (2017 vintage)	2,362.7	2,545.4	2,691.5	2,822.5	2,940.4	3,046.7
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% diff	1.1%	0.2%	-2.3%	-6.2%	-8.2%	-8.8%

Special Appropriations, Community Partnerships & Regional Investment Strategy

Two Year Comparison for Council Consideration

(# of years of contribution in FY 2018-19, if known)

	Amended FY 2017-18	Proposed FY 2018-19
501000-519000 Personnel Service Costs	118,209	123,204
Personnel Service Costs for Regional Investment Strategy formerly Regional Transportation Strategy. Costs offset by reduction in Contracted Professional Services budget (year 3)	118,209	123,204
521100 - Membership and Professional Dues	25,704	25,800
Clackamas County Business Alliance (year 5)	2,673	2,700
Columbia Corridor Association (year 5)	2,673	2,700
East Metro Economic Alliance (year 5)	2,673	2,700
Lloyd Business Improvement District dues (year 4 or more)	15,012	15,000
Westside Economic Alliance (year 5)	2,673	2,700
524000 - Contracted Professional Svcs	716,596	726,796
Community Partnerships (year 3)	300,000	300,000
Community Partnerships (year 3) carry forward from FY 2016-17	204,805	
MPAC Speakers Bureau (year 4)	50,000	50,000
Low Income Transit Fare Funding Options	30,000	
Regional Investment Strategy (year 3) formerly Regional Transportation Strategy	131,791	376,796
524010 - Contracted Prof Svcs - Accounting and Auditing	157,320	162,000
Financial Audit	157,320	162,000
524070 - Contracted Prof Svcs - Mgmt., Consult. & Communication	130,000	
Regional Investment Strategy (year 3) formerly Regional Transportation Strategy carry forward from FY 2016-17	130,000	
524600 - Sponsorship Expenditures	263,000	272,000
First Stop Portland (year 4 or more)	15,000	15,000
General sponsorships (year 4 or more)	22,300	22,300
Greater Portland, Inc. (year 3 or more)	25,000	25,000
Intertwine Consortium (year 4 or more)	50,000	50,000
Metro Export Initiative (year 7)	25,000	25,000
RACC Contribution (year 4 or more)	25,000	25,000
Rail Volution (year 4 or more)	15,000	15,000
Regional Disaster Preparedness Org. (RDPO) (year 5)	25,000	25,000
Transportation for America (T4A) (year 5)	4,700	4,700
Willamette Falls Heritage Coalition		5,000
Willamette Falls Locks Sponsorship (year 4)	56,000	60,000
530000 - Payments to Other Agencies	2,467,000	2,501,000
CET grants	2,467,000	2,501,000
530500 - Election Expenses	100,000	100,000
Elections	100,000	100,000
532000 - Government Assessments	101,138	145,748
Levee contributions and loan payments	101,138	145,748
549010 - Tri-Met Transit Pass	221,122	227,000
TriMet Passport	221,122	227,000
Grand Total	4,300,089	4,283,548

History of Opportunity Account

	FY 2018-19	FY 2017-18	FY 2016-17	FY 2015-16	FY 2014-15
Initial designated amount	500,000	500,000	500,000	500,000	500,000
Proposed Budget Amount	0	200,000	215,000	500,000	500,000
Adopted Budget Amount		170,000	215,000	274,000	300,000
Amended Budget Amount		170,000	5,000	194,000	300,000
Amount allocated each FY	\$500,000	\$330,000	\$495,000	\$306,000	\$200,000

	FY 2013-14	FY 2012-13	FY 2011-12	FY 2010-11	FY 2009-10
Initial designated amount	500,000	500,000	500,000	0	500,000
Proposed Budget Amount	250,000	500,000	500,000	0	500,000
Adopted Budget Amount	250,000	440,000	211,411	0	0
Amended Budget Amount	250,000	116,100	78,496	0	0
Amount allocated each FY	\$0	\$383,900	\$421,504	\$0	\$500,000

FY 2018-19

- Amount allocated during development of proposed budget - \$500,000 for Regional Investment Strategy

FY 2017-18

- Amount allocated during development of proposed budget - \$250,000 for Regional Transportation Strategy
- Amount allocated during development of proposed budget - \$50,000 for the Levee Ready Columbia Project
- Councilor Chase amendment at budget adoption - \$30,000 for Low Income Transit Fare Funding Options Study

FY 2016-17

- Amount allocated during development of proposed budget - \$150,000 for Least Cost Planning
- Amount allocated during development of proposed budget - \$135,000 for MetroScope - enhancement for UGB
- Mid-Year Resolution 17-4768 – Councilors Craddick, Dirksen and Stacy - \$150,000 for Regional Transportation Strategy
- Mid-Year Resolution 17-4768 – \$50,000 for the Oregon Convention Center Hotel project's workforce diversity and outreach program
- Mid-Year Resolution 17-4768 – Councilor Dirksen - \$10,000 for participation in the Rose Festival Grand Floral Parade

FY 2015-16

- Councilor Stacey amendment at budget adoption - \$150,000 for least cost planning principles
- Councilor Collette amendment at budget adoption - \$50,000 for speakers bureau
- Substantive amendment at budget adoption (Council #8) - \$26,000 for 2nd half of Willamette Falls locks sponsorship for FY 2015-16
- Mid-Year: Resolution 16-4687, \$80,000 for exploratory work to research renewal of location option levy in November 2016

FY 2014-15

- Councilor Chase amendment at budget adoption - \$200,000 for equitable housing strategy two year pilot program.

FY 2013-14

- Budget proposed at reduced rate to help balance budget.

History of Opportunity Account (continued)

FY 2012-13

- Councilor Burkholder amendment at budget adoption - \$60,000 for limited duration GIS position for multimodal data collection
- Mid-Year:
 - a. Ordinance 12-1285, \$173,900 for Natural Areas Funding Public Involvement
 - b. Ordinance 12-1291, \$60,000 for land use application planning and design steps needed for a publicly accessible Tualatin River Canoe Launch
 - c. Ordinance 13-1305, \$90,000 for election expenses for Parks and Natural Areas Local Option Levy

FY 2011-12

- During Council review of the proposed budget the Council made the following amendments using the Opportunity Account as the funding mechanism:
 - a. \$65,000 for Brownfields amendment
 - b. \$65,000 for Parcelization amendment
 - c. \$100,000 for Phase 1 of Tualatin River Water Trail effort
 - d. \$53,589 – balance needed to fund other Council amendments including Development Opportunity Fund and extension of climate change position
- Mid-Year: Ordinance 11-1266, \$57,915 for Blue Lake Park disc golf project
- Reserved for future expense: \$75,000 reserved from balance of Opportunity Account to fund Council three year commitment to the Metro Export Initiative

FY 2010-11:

- Eliminated by Chief Operating Officer to assist in balancing the budget

FY 2009-10:

- During Council review of the proposed budget the Council made the following amendments using the Opportunity Account as the funding mechanism:
 - a. \$45,000 for conservation education
 - b. \$218,000 for regional system (connecting green)
 - c. \$92,500 for Nature in Neighborhood grants
 - d. \$40,000 for Lone Fir maintenance/improvements
 - e. \$67,000 for infrastructure financing limited duration position
 - f. \$37,500 partial funding for climate change.

Memo



Metro

600 NE Grand Ave.
Portland, OR 97232-2736

Date: March 5, 2018
To: Martha Bennett, COO
From: Ina Zucker, Council Office Director
Subject: Regional Investment Strategy funding

You asked me to prepare a summary of the projected funding that departments have committed and the Council has committed to the Regional Investment Strategy work program for fiscal year 2018-19. As you are aware, Council has directed staff to prepare for three funding measures to go to the voters in November 2018, 2019, and 2020. Council has agreed that the Council Opportunity Fund is the appropriate place to fund much of the strategic and tactical work that Metro must do pre-referral to be successful in these efforts. Staff has prepared budgets for four fiscal years (2016-2020) for the following activities: project staffing, political consultants, public opinion research, research and technical consulting, community partnership, public engagement, communications including social media, professional facilitation, and events and trips. As with all budgets, these financial projections are subject to some change.

	2018-19	
All 3	Project coordination staffing	\$120,000
All 3	Communications and engagement support	\$40,000
All 3	Project logistics, events	\$10,000
All 3	Equity consulting	\$10,000
All 3	Social media/messaging	\$59,000 (Council Office budget)
Hous	Public information (mailing)	\$75,000
P/N	Polling, research and strategy	\$60,000
P/N	Community partnerships	\$60,000 (Parks budget)
P/N	Technical consultant	\$25,000 (Parks budget)
Transp	Polling, research and strategy	\$85,000
Transp	Community partnerships	\$50,000
Transp	Engagement (consultants, logistics, events)	\$50,000
Transp	My Place (forums, Regional Snapshots, DEI priorities, etc)	\$100,000 (Plan and Dev budget)
	TOTAL Opportunity Fund	\$500,000
	TOTAL Departments	\$244,000



Metro | Memo

Date: April 17th, 2018

To: Council President Tom Hughes
Councilor Sam Chase
Councilor Shirley Craddick
Councilor Craig Dirksen
Councilor Betty Dominguez
Councilor Kathryn Harrington
Councilor Bob Stacey

From: Lisa Houghton, Financial Planning Manager

Subject: FY 2018-19 Councilor Budget Review and Amendment Process

Councilor amendments to the FY 2018-19 budget are due to Financial Planning by 10:00 a.m., Tuesday, May 22nd. The Councilor amendment form was provided in an earlier email and is also included in the documents provided today. There are no changes in the form from previous years. While the form does ask for costs estimates and funding options it does not require the sponsor of the proposal to prepare a balanced amendment. For Councilors, the amendment form focuses more on description, purpose and objectives of the proposal.

We ask that the Councilors work through their Council Policy Coordinators to develop any proposed amendments. Financial Planning staff and the Finance Managers are available to provide technical assistance where needed.

The final packet of all amendments (both Councilor and Department generated) will be released on Friday, June 8th. Amendments are currently scheduled to be reviewed and discussed with the Council on Tuesday, June 12th, with consideration and vote on Thursday, June 14th. An additional work session is also scheduled for Tuesday, June 19th, should it be needed. Final adoption of the budget is scheduled for Thursday, June 21st. The latest Council Budget Review calendar with key dates and deadlines was provided in an earlier email and is also included in the documents provided today.

If you have any questions, please contact me or Tim Collier, Director of Finance and Regulatory Services.

cc: Martha Bennett, Chief Operating Officer
Tim Collier, Director Finance and Regulatory Services
Council Policy Coordinators

SUBJECT TO CHANGE

as of 3/27/2018

FY 2018-19 Council Budget Review Key Dates and Deadlines

Color Key:

Financial Planning key actions or dates	Chief Operating Officer deadlines or key actions
Council budget retreats, work sessions, meetings or key action dates	Department deadlines

Thursday March 29, 2018	Release Proposed Budget to Council in electronic format for individual review (no deliberation of proposal allowed until April 12th)
Thursday April 5, 2018 COB	Councilor questions (first round) due to Financial Planning
Thursday April 12, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4873 Chief Operating Officer acting as Budget Officer presents Proposed Budget and Budget Message to the Metro Council acting as Budget Committee
Thursday April 12, 2018 COB	Department responses to Councilor questions due to Financial Planning (first round)
Monday April 16, 2018 Afternoon	Distribute responses to Councilor questions on budget (first round)
Monday April 16, 2018 COB	Councilor questions on budget due to Financial Planning (second round)
Tuesday April 17, 2018 2:00 p.m.	BUDGET WORK SESSION: Discussion of budget. Review process and calendar, Councilor questions, Councilor discussion, Council work session
Friday April 20, 2018 Noon	Department responses to Councilor questions due to Financial Planning (second round)
Monday April 23, 2018 Afternoon	Distribute responses to Councilor questions on budget (second round)
Tuesday April 24, 2018 2:00 p.m.	BUDGET WORK SESSION (if needed): Discussion of budget. Review process and calendar, Councilor questions, Councilor discussion, Council work session
Thursday May 3, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4873 Council approves budget for transmittal to the TSCC
Tuesday, May 15, 2018	Deadline to file budget with the TSCC
May 16 – June 7, 2018	TSCC public comment period (minimum 20 days)
Monday May 21, 2018 COB	Deadline for submittal of final department substantive and technical amendments <i>Amendments after approval are subject to limitations of Oregon Budget Law</i>
Tuesday May 22, 2018 by 10:00 a.m.	Deadline for submittal of Councilor amendments to the budget <i>Amendments after approval are subject to limitations of Oregon Budget Law</i>
Thursday, June 7, 2018 12:30 p.m.	TSCC public hearing on Approved Budget Metro Regional Center Council Annex
Friday June 8, 2018	Release packet of final department technical amendments and Councilor amendments
Tuesday June 12, 2018 2:00 p.m.	BUDGET WORK SESSION: Discussion of Councilor amendments; Review of final technical amendments
Thursday, June 14, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4874 Council considers and votes on amendments to budget
Tuesday June 19, 2018 2:00 p.m.	BUDGET WORK SESSION (if needed): Additional discussion of Councilor amendments
Thursday, June 21, 2018 2:00 p.m.	COUNCIL MEETING (Public Hearing): Resolution # 18-4874- final action taken Council adopts budget
July 1, 2018	Budget Effective
July 13, 2018	Deadline to file tax levy information with TSCC & Counties (July 14 th is Saturday)

**FY 2018-19 Council Proposals
For Budget Amendment Discussion**

Councilor

#

Enter in the information under appropriate area. Please delete the descriptions under each header if additional space is needed.

Short Title

Concise Description

Please describe the proposal, sufficient in scope that the cost and/or level of effort can be evaluated.

Objective

Clear statement of what this proposal is intended to accomplish.

What is the desired outcome? How will you tell if the proposal reaches the desired outcome?

Duration (put an 'x' in the appropriate line, for specific length write in the length)

_____ One time

Specific length: _____

_____ On-going

Cost Estimate

How much are you willing to spend to achieve your desired outcome? What is the estimated cost or effort to implement this proposal? Give as much information about the cost as you can. Categories of expense (staffing, number of positions, outside services, necessary equipment) are helpful; line item detail is not required. Does this proposal generate revenue now? In some later period?

Funding Options

How will you fund this proposal? Sources might include:

- a. Redeployment or elimination of existing effort by reassigning staff or eliminating an equivalent dollar amount from the proposed operating budget (be specific);
- b. Use of one-time money from Council Opportunity Account (already fully committed to Regional Investment Strategy for FY 18-19);
The five-year plan anticipates that the Opportunity Fund will be funded each year. Committing the fund now may limit ability to respond to new opportunities that occur during the year.
- c. Use of one-time money from a specified reserve.
This option follows the financial policies of using one-time money to fund one-time (not permanent) expenses. Funding for multi-year proposals would all come from this year's reserves. Depending on the chosen reserve, this may require replenishing the reserve next year under the "pay yourself first" principal for maintaining specified reserves.

Relationship to other programs

How does this proposal relate to, enhance or complement existing programs or projects?

Stakeholders

Who will be affected, positively or negatively, by this proposal? What known groups or coalitions will have interest in this?