



600 NE Grand Ave.
Portland, OR 97232-2736

Metro Policy Advisory Committee (MPAC)

agenda

Wednesday, February 28, 2024

5:00 PM

Metro Regional Center, Council Chamber,
<https://zoom.us/j/95889916633> (Webinar

ID: 958 8991 6633),

[https://www.youtube.com/watch?](https://www.youtube.com/watch?v=9WQiWVzMF-Y)

[v=9WQiWVzMF-Y](https://www.youtube.com/watch?v=9WQiWVzMF-Y)

1. Call To Order, Declaration of a Quorum & Introductions (5:00 PM)

Please note: This meeting will be held in person at the Metro Regional Center Council Chambers with opportunities to join online. You can join the meeting on your computer or other device by using this link: <https://zoom.us/j/95889916633> or by calling +1 669 900 6128 or +1 877 853 5257 (Toll Free)

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2. Public Communication on Agenda Items (5:05PM)

Public comment may be submitted in writing and will also be heard by electronic communication (video conference or telephone). Written comments should be submitted electronically by mailing legislativecoordinator@oregonmetro.gov. Written comments received by 4:00 pm on the Wednesday before the meeting will be provided to the committee prior to the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting the legislative coordinator by phone at 503-813-7591 and providing your name and the item on which you wish to testify; or (b) registering by email by sending your name and the item on which you wish to testify to legislativecoordinator@oregonmetro.gov.

Those requesting to comment during the meeting can do so by using the "Raise Hand" feature in Zoom or emailing the legislative coordinator at legislativecoordinator@oregonmetro.gov. Individuals will have three minutes to testify unless otherwise stated at the meeting.

3. Council Update (5:10PM)

4. Committee Member Communication (5:15PM)

5. Consent Agenda (5:20PM)

5.1 Consideration of the January 24, 2024 MPAC Minutes [24-6022](#)

Attachments: [012424 MPAC Minutes](#)

5.2 Metro Technical Advisory Committee (MTAC) Nominations [COM 24-0773](#)
for Member/Alternate Member Positions

Presenter(s): Eryn Kehe (she/her), Metro

Attachments: [MPAC Worksheet](#)
[MTAC Nominations Memo](#)
[MTAC Member List, as of February 9, 2024](#)

6. Information/Discussion Items (5:35 PM)

6.1 Waste Prevention and Environmental Services: Garbage [COM 24-0774](#)
and Recycling System Facilities Plan Update

Presenter(s): Estee Segal (she/her), Metro

Attachments: [MPAC Worksheet](#)
[Attchment 1](#)
[Attachment 2](#)

6.2 2024 Urban Growth Management Decision: Draft Regional [COM 24-0775](#)
Population, Household, and Employment Forecast

Presenter(s): Ted Reid, he/him, Metro
Eryn Kehe, she/her, Metro
Josh Harwood, Metro
Dennis Yee, Metro

Attachments: [MPAC Worksheet](#)
[Regional Forecast Expert Review Panel Summary](#)

7. Adjourn (7:00)

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ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមទូរស័ព្ទទូរស័ព្ទសេវាកម្មរបស់ www.oregonmetro.gov/civilrights។

បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃច្រើនការ) ប្រាំពីរថ្ងៃ ថ្ងៃច្រើនការ មុនថ្ងៃប្រជុំដើម្បីអាចឲ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក ។

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2024 MPAC Work Program

As of 2/8/24

Items in italics are tentative

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|--|--|
| <p>January 24, 2024 (online only)</p> <ul style="list-style-type: none"> • MPAC Nominations and Review of MPAC Charge (Chair Pam Treece, Malu Wilkinson, Metro; 10 min) • Carbon Pollution Reduction Grant (Eliot Rose (he/him), Metro; 30 min) • Urban Growth Management Functional Plan Annual Compliance Report (Glen Hamburg (he/him), Metro; 15 minutes) • Urban Growth Management Expert Panel (Ted Reid (he/him), Metro, Josh Harwood, Metro, Peter Hulseman, City of Portland, Mark McMullen, State of Oregon, Jeff Renfro, Multnomah County; 80 min) | <p>February 28, 2024 (in-person)</p> <ul style="list-style-type: none"> • Metro Technical Advisory Committee (MTAC) Nominations for Member/Alternate Member Positions (consent) • Waste Prevention and Environmental Services: Garbage and Recycling System Facilities Plan Update (Estee Segal (she/her), Metro; 30 min) • UGM: regional projection of population and job growth (Ted Reid, he/him, Metro; ECO NW consultants; 45 min) |
| <p>March 27, 2024 (online only)</p> <ul style="list-style-type: none"> • Legislative Update (Jenna Jones (she/her), Metro) • Housing Update (30 min) • UGM: Preliminary UGB Capacity Estimates needs (Ted Reid, he/him, Metro; 45min) | <p>April 24, 2024 (in-person)</p> <ul style="list-style-type: none"> • UGM: Regional Housing Needs Analysis (Ted Reid (he/him), Metro; 60 min) • Site Readiness Toolkit (David Tetrick, he/him, Metro; 30 min) |
| <p>May 22, 2024 (online only)</p> <ul style="list-style-type: none"> • Presentation of city UGB expansion proposals (Eryn Kehe, she/her, Ted Reid, he/him, Metro; city partners TBD; 45 min) • 2040 Planning & Development Grants - program refinements (Serah Breakstone, she/her, Metro; 30 min) | <p>June 26, 2024 (in-person)</p> <ul style="list-style-type: none"> • Assessment of city employment land UGB expansion proposals (Eryn Kehe, she/her, Ted Reid, he/him, Metro; city partners TBD; 45 min) |
| <p>July 24, 2024 (online only)</p> <ul style="list-style-type: none"> • 2024 Draft Urban Growth Boundary Report Eryn Kehe, she/her, Ted Reid, he/him, Metro; 45 min) | <p>August 28, 2024- CANCELLED COO recommendation UGM Decision released and emailed to MPAC members</p> |
| <p>September 11, 2024 (virtual)</p> <ul style="list-style-type: none"> • <i>UGM COO recommendation review and public comment feedback</i> | |
| <p>September 25, 2024 (in person)</p> <ul style="list-style-type: none"> • UGB Expansion Recommendation to Metro Council (action) | <p>October 23, 2024 (online)</p> |

November 13, 2024 (in person)

December 11, 2024 (online)

- Follow up on UGM process (Ted Reid, he/him, Metro; 45 min)

5.1 Consideration of the January 24, 2024 MPAC Minutes

Consent Agenda

Metro Policy Advisory Committee
Wednesday, February 28th, 2024



600 NE Grand Ave.
Portland, OR 97232-2736
oregonmetro.gov

METRO POLICY ADVISORY COMMITTEE (MPAC)

Meeting Minutes
January 24, 2024

MEMBERS PRESENT

Pam Treece (Chair)
Vince Jones-Dixon
Gordon Hovies
Sherry French
Ed Gronke
Thomas Kim
Luis Nava
Gerritt Rosenthal
Ty Stober
Mark Shull
Tim Rosener
Mary Nolan
Glen Yung
Terri Preeg Riggsby
Brett Sherman
Denyse McGriff

AFFILIATION

Washington County
City of Gresham, Second Largest City in Multnomah County
Special Districts in Washington County
Special Districts in Clackamas County
Citizen of Clackamas County
TriMet
Citizen of Washington County
Metro Council
City of Vancouver
Clackamas County
Other Cities in Washington County
Metro Council
Clark County
Special Districts in Multnomah County
City of Happy Valley, Other Cities in Clackamas County
City of Oregon City, Second Largest City in Clackamas County

MEMBERS EXCUSED

Ted Wheeler
Randy Lauer
Duncan Hwang
Allison Tivnon
Omar Qutub
Sharon Meieran
Brian Hodson
James Fage
Susan Greenberg
Steve Callaway
Carmen Rubio
Joe Buck
Kirstin Greene
Alex Howard

AFFILIATION

City of Portland
City of Troutdale, Other Cities in Multnomah County
Metro Council
City of Beaverton, Second Largest City in Washington County
Citizen of Multnomah County
Multnomah County
City of Canby, City in Clackamas County outside UGB
City of North Plains, City in Washington County outside UGB
Beaverton School Board, Governing Body of a School District
Largest City in Washington County
City of Portland
City of Lake Oswego, Largest City in Clackamas County
Oregon Department of Land Conservation and Development
Port of Portland

ALTERNATES PRESENT

Anthony Martin
Laura Kelly

Bill Reid

Ashley Hartmeier-Prigg

AFFILIATION

Largest City in Washington County
Oregon Department of Land Conservation and
Development

City of North Plains, City in Washington County
outside UGB

City of Beaverton, Second Largest City in
Washington County

OTHERS PRESENT: Medha, Adam B., Jeff Renfro, Mark McMullen, Tom Armstrong, Joe Gall,
Sandy Glantz, Michael Veale, Dee Anders, Jaimie Lorenzini, Jim Duggan, Stephen Roberts, Jean
Senechal Biggs, Braden, Dr. Smart Ochoi, Jessica Pelz

STAFF: Connor Ayers, Jemeshia Taylor, Eryn Kehe, Jaye Cromwell, Roger Alfred, Malu Wilkinson,
Ted Reid, Eliot Rose, Dennis Yee, Glen Hamburg, Kim Ellis, Laura Combs, Josh Harwood

1. CALL TO ORDER, INTRODUCTIONS, CHAIR COMMUNICATIONS

MPAC Chair Pam Treece called the Zoom meeting to order at 5:00 PM.

Metro staff Jemeshia Taylor (she/her) called the role.

Chair Treece asked if they had reached quorum.

Metro staff Roger Alfred noted that they had reached quorum.

2. PUBLIC COMMUNICATION ON AGENDA ITEMS

Chair Treece read aloud the instructions for providing public testimony.

No members of the public provided testimony.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

3. COUNCIL UPDATES

Metro Councilor Gerritt Rosenthal gave updates about the Supportive Housing Services tax, a possible
new Zoo Bond, and the Urban Growth Report. He also gave updates about the Waste Prevention and
Environmental Services, the Parks and Nature and a burst pipe at the Metro Regional Center.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

4. COMMITTEE MEMBER COMMUNICATIONS

City of Sherwood Mayor Tim Rosener mentioned that Kim Young was appointed as the new Council President for the City of Sherwood.

City of Vancouver Councilmember Ty Stober introduced himself to the MPAC members.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

5. CONSENT AGENDA

5.1 Consideration of the December 13, 2023 MPAC Minutes

Chair Treece called for a motion to approve the consent agenda.

MOTION: City of Sherwood Mayor Tim Rosener moved to approve the consent agenda. City of Oregon City Mayor Denyse McGriff seconded.

ACTION: Councilmember Stober abstained. With all else in favor, the consent agenda was approved.

6. ACTION ITEMS

6.1 MPAC Nominations and Review of MPAC Charge

Chair Treece introduced Metro staff Malu Wilkinson (she/her) to present.

Wilkinson gave an overview of MPAC, MPAC's charge and MTAC. She mentioned that the recommended nominees were stated in the meeting packet.

Chair Treece thanked staff for their work. She mentioned that Mayor McGriff will step down from the First Vice Chair position and nominated City of Happy Valley Councilor Brett Sherman for the position.

Mayor McGriff explained that she was appointed by the Governor to the Willamette Falls Locks Authority and that will take a lot of her time. She noted that she will still be participating in MPAC.

Gronke commented that Councilor Sherman would be a great candidate for the position.

Chair Treece mentioned that City of Gresham Councilor Vince Jones-Dixon agreed to be nominated for the Second Vice Chair position.

Mayor McGriff mentioned that Councilor Sherman was featured in the West Linn Tidings newspaper.

Councilor Jones-Dixon commented that he was looking forward to this year.

Chair Treece called for a motion to approve the nominations.

MOTION: Mayor McGriff moved to approve the nominations. Ed Gronke seconded.

ACTION: With all in favor, the action passed.

Chair Treece mentioned their recommendation to the Metro Council on the UGB expansion. She also mentioned that the MPAC meetings will be in-person every other month.

Wilkinson noted that the February meeting will be in-person at Metro. She also mentioned that staff looking into having the meetings in different locations.

Chair Treece asked those that want to volunteer to host a meeting to also consider if they have the capacity to run a meeting partially on Zoom.

Mayor Rosener mentioned that the city of Sherwood could host a MPAC meeting.

Mayor McGriff raised concerns about not be able to attend some of the in-person meeting because of another in-person meeting she must attend.

Chair Treece commented that the goal is to make the meetings available to everyone.

Wilkinson explained that they cannot hold a public meeting without a remote option.

Councilor Sherman noted that the City of Happy Valley could host a MPAC Meeting.

Councilmember Stober mentioned that MPAC could also visit to the City of Vancouver.

Chair Treece noted the level of commitment and the importance of seeing each other in person.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

7. INFORMATION/ DISCUSSION ITEMS

7.1 Carbon Pollution Reduction Grant

Chair Treece introduced Metro staff Eliot Rose (he/him) to present.

Rose gave an overview of the what the Carbon Pollution Reduction Grant (CPRG) do and what MPAC members can do. He noted the members of the Climate Partners' Forum, the rounds of planning and the rounds of funding. Rose mentioned the importance of coordination and explained how the plans and implementation grants overlap. He discussed the PCAP development process timeline, the Metro area PCAP priority strategies and what they have learned so far. Rose noted the next steps and some discussion questions.

Rose asked Metro staff Jemeshia Taylor to post the discussion questions in the chat.

Taylor posted the discussion questions in the chat.

Councilor Sherman asked if Metro would be the entity that is doing the application and the coordination for the grant. He also asked if the action plan was mandatory or a tool that they have available.

Rose explained that the EPA allows for Metro to lead a collaborative action or for other agencies to lead for one of the implementation grants. He noted that the program is new, and the application is complicated. Rose gave some examples of agencies that might collaborative together on certain applications.

Rose noted that the EPA's deadline for applicants to submit their notice of intent to apply is February 1st. He explained that once the applications are in, it will be easier to coordinate with other applicants.

Chair Treece noted that they are running behind and that they should keep their questions and answers concise.

Mayor McGriff asked about the role of TriMet. She raised concerns that TriMet is their partner in reducing climate change, but they are not participating as much.

Rose mentioned that transit is one of the best ways to reduce greenhouse gases. He noted that they are working with TriMet to see what implementation applications can best move forward.

Gronke asked if there was a formula for ODOT to use when they propose a reduction in greenhouse gases because of congestion pricing.

Rose asked Wilkinson to speak on the parameters of the congestion pricing program.

Wilkinson noted that staff will follow-up with Gronke.

Gronke commented about congestion pricing and that it does not really help reduce greenhouse gas emissions.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

7.2 Urban Growth Management Functional Plan Annual Compliance Report

Chair Treece introduced Metro staff Glen Hamburg (he/him) to present.

Hamburg noted Metro's functional plans, including the Regional Framework Plan (RFP) and the Urban Growth Management Functional Plan (UGMFP). He discussed the compliance report, the UGMFP Title 11 and the UGMFP Title 4. Hamburg explained the 2023 amendments and the requested changes from Happy Valley.

Chair Treece asked Hamburg to stay in the meeting to answer questions.

Hamburg noted that he cannot stay for the rest of the meeting but can gave out his contact information.

Seeing no further discussion, Chair Treece moved onto the next agenda item.

7.3 Urban Growth Management Expert Panel

Chair Treece introduced Metro staff Ted Reid (he/him) to present.

Reid discussed the Urban Growth Report and noted the purpose of the presentation.

Josh Hardwood, Metro introduced Mark McMullen, State of Oregon.

McMullen discussed inflation, the labor market, and Oregon's unique business cycle. He mentioned some expected impacts from the CHIPS Act and some reasons why workers will remain scarce for some time in Oregon. McMullen explained that the population growth had stalled, but the current demographics are great. He discussed data on Oregon's domestic migration, population, housing, and housing demand. McMullen mentioned the effect of a zero-migration scenario on Oregon's population and housing demand.

Hardwood commented on how some things are changing, and others are not. He introduced Jeff Renfro, Multnomah County and asked him about the things that probably will and will not go back to normal.

Renfro mentioned the relationship population growth or job growth to income growth. He discussed changes in the relationship between the drivers of their tax revenue and indicators of economic activity.

Hardwood commented that even in the zero-migration scenario, they would still need more housing.

Councilor Sherman noted the growth of Happy Valley and its need for single-family homes. He explained that the savings for builders from incentives do not always get passed down to those buying homes. He asked how they can incentivize builders to make the housing the region needs.

Hardwood explained the demand can change quickly, while the supply does not change. He suggested that they should not overreact to the impact of the short-term demand. Hardwood mentioned that they will probably stay away from the individual policy prescriptions.

McMullen noted that the Governor's taskforce is putting out a list of recommendations related to housing. He mentioned that the housing needs analysis will change because of sample size issue and the census data that was used.

Councilor Sherman commented on the balance of providing new units that are more affordable and not reducing the values of existing homes.

Mayor Rosener asked about long-term solutions, such as making more land available for housing. He noted that much of the land in Sherwood that is available for housing is infrastructure constrained. Mayor Rosener also commented on the importance of land for job and attracting companies to Oregon.

Hardwood stated that the question was outside of his expertise, but explained how City of Portland has a different vacant land problem. He mentioned the difficulty of predicting where the development is going to happen.

City of Hillsboro Councilor Anthony Martin asked how housing production increases and climate change factor into the Metro area forecast.

Hardwood mentioned that there will be climate migration, but not to the scale that they need to put it as a factor in a forecast.

Renfro mentioned that climate was not explicitly incorporated, but it may be incorporated in the future within the livability factor.

McMullen noted that Oregon is losing population, but there are jobs available. He believed that climate is a factor and noted the difficulty in getting the data.

Hardwood mentioned that cities like Spokane and Salt Lake City are booming partially because of the cost of living.

Councilor Rosenthal asked if the concept of community has changed and if that would affect housing density and cost. He also mentioned Orenco Station as an example.

Hardwood explained that they look at demographics, like age cohorts and their behavior over time.

Renfro commented on how some Millennials want the same things as previous generations, such as a family and a house, later in their life. He explained that the core metro area is not affordable for younger people, so they are going to other places.

McMullen noted that there are debates about the character of neighborhoods has changed across generations. He mentioned that Millennials in Oregon are not having children like previous generations, but their housing preferences may change when they do have children.

Chair Treece asked the panelists for their remarks and advice to MPAC on the UGM decision.

Mayor Rosener explained that the average age of the population of Sherwood has been mostly constant. He asked what things they need to do to reverse some of the trends.

Hardwood noted the challenges of making long-term plans and suggested that they not overreact to recent events because it is a longer time horizon.

McMullen mentioned the shortage of commercial and industrial land in Oregon. He noted that they will need to lean on their industry expertise and clusters in the state that make sense for employers.

Renfro suggested that they be realistic about what the recovery of the region will look like, to focus on the core drivers of growth and to look at the demographics.

Chair Treece thanked the panelists and Metro staff.

8. ADJOURN

Chair Treece adjourned the meeting at 7:00 pm.

Respectfully Submitted,

A handwritten signature in black ink that reads "Jemeshia Taylor". The signature is written in a cursive, flowing style.

Jemeshia Taylor
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF JANUARY 24, 2024

| ITEM | DOCUMENT TYPE | DATE | DOCUMENT DESCRIPTION | DOCUMENT NO. |
|-------------|----------------------|-------------|---|---------------------|
| 7.1 | Presentation | 01/24/24 | EPA Climate Pollution Reduction Grant (CPRG) Presentation | 012424m-01 |
| 7.2 | Presentation | 01/24/24 | 2023 Compliance Report Presentation | 012424m--02 |
| 7.3 | Presentation | 01/24/24 | Oregon's Economic and Housing Outlook Presentation | 012424m-03 |

**5.2 Metro Technical Advisory Committee (MTAC)
Nominations for Member/Alternate Member Positions**

Consent Agenda

Metro Policy Advisory Committee
Wednesday, February 28th, 2024

MPAC Worksheet

Agenda Item Title: Metro Technical Advisory Committee (MTAC) Nominations for Member/Alternative Member Positions

Presenters: Eryn Kehe, Urban Policy & Development Manager II

Contact for this worksheet/presentation: Marie Miller

Purpose/Objective

The purpose of this presentation is to forward nominations from regional jurisdictions, agencies and community partners to fill vacant positions on the Metro Technical Advisory Committee (MTAC). MTAC is an advisory committee of MPAC that provides technical recommendations on growth management subjects as directed by MPAC. The candidates nominated to fill these positions are excellent professionals and knowledgeable in the subject matter of this committee.

Outcome

Action to approve the nominations presented for the Metro Technical Advisory Committee.

What has changed since MPAC last considered this issue/item?

Vacancies on the committee have left positions open. These nominations help fill the committee roster for review of subjects and technical recommendations to MPAC.

What packet material do you plan to include?

A memo that describes the nominations and positions being considered for confirmation on the committee.

METRO TECHNICAL ADVISORY COMMITTEE (MTAC) 2024

Updated: 2/9/2024

| <i>Position</i> | <i>Member</i> | <i>Alternate</i> |
|---|----------------------------|--|
| Clackamas County Citizen | Joseph Edge | Kamran Mesbah |
| Multnomah County Citizen | Carol Chesarek | Victoria (Vee) Paykar |
| Washington County Citizen | Victor Saldanha | Faun Hosey |
| Largest City in the Region: Portland | Tom Armstrong | Morgan Tracy Patricia Diefenderfer |
| Largest City in Clackamas County: Lake Oswego | Erik Olson | Jessica Numanoglu* |
| Largest City in Multnomah County: Gresham | Terra Wilcoxson | Mary Phillips Ashley Miller |
| Largest City in Washington County: Hillsboro | Dan Dias | Dan Rutzick |
| Second Largest City in Clackamas County: Oregon City | Aquilla Hurd-Ravich | Pete Walter |
| Second Largest City in Washington County: Beaverton | Anna Slatinsky | Jean Senechal Biggs Brian Martin Jessica Engelmann |
| Clackamas County: Other Cities | Laura Terway, Happy Valley | Laura Weigel, Milwaukie |
| Multnomah County: Other Cities | Vacant | Dakota Meyer, Troutdale* |
| Washington County: Other Cities | Steve Koper, Tualatin | Miranda Bateschell, Wilsonville |
| City of Vancouver | Katherine Kelly | Rebecca Kennedy |
| Clackamas County | Jamie Stasny | Martha Fritzie |
| Multnomah County | Adam Barber | Kevin Cook Sarah Paulus Graham Martin* |
| Washington County | Jessica Pelz | Theresa Cherniak |
| Clark County | Gary Albrecht | Oliver Orjiako |
| Oregon Department of Transportation | Neelam Dorman | Glen Bolen |

| | | |
|---|--|--|
| Oregon Department of Land Conservation & Development | Laura Kelly | Kelly Reid |
| Service Providers: Water & Sewer | Manuel Contreras, Jr., Clackamas Water Environmental Services | Chris Faulkner, Clean Water Services Cassera Phipps, Clean Water Services |
| Service Providers: Parks | Gery Keck, Tualatin Hills Park & Recreation District | Kia Shelly, North Clackamas Park & Recreation District* |
| Service Providers: School Districts | Cindy Detchon, North Clackamas School District | Vacant |
| Service Providers: Private Utilities | Nina Carlson, NW Natural | Raihana Ansary, Portland General Electric |
| Service Providers: Port of Portland | Tom Bouillion | Greg Theisen |
| Service Providers: TriMet | Tara O'Brien | Tom Mills* Fiona Lyon |
| Private Economic Development Organizations | Vacant | Jerry Johnson, Johnson Economics, LLC |
| Public Economic Development Organizations | Bret Marchant, Greater Portland, Inc. | Scott Bruun, Oregon Business Industry Jeff Hampton, Business Oregon |
| Land Use Advocacy Organization | Brett Morgan, 1000 Friends of Oregon | Sarah Radcliffe, Habitat for Humanity Portland Region Mary Kyle McCurdy, 1000 Friends of Oregon |
| Environmental Advocacy Organization | Nora Apter, Oregon Environmental Council | Aaron Golub, Portland State University Jacqui Treiger, Oregon Environmental Council |
| Housing Affordability Organization | Rachel Loftin, Community Partners for Affordable Housing | Rachael Duke, Community Partners for Affordable Housing |
| Residential Development | Preston Korst, Home Builders Association of Metropolitan Portland | Vacant |
| Redevelopment/Urban Design | Brian Moore, Prosper Portland* | Erin Reome, North Clackamas Park & Recreation District* |
| Commercial/Industrial | Erik Cole, Schnitzer Properties, Inc. and Revitalize Portland Coalition | Greg Schrock, Portland State University* |
| Green Infrastructure, Design & Sustainability | Mike O'Brien, Mayer/Reed, Inc. | Craig Sheahan, David Evans & Associates, Inc. |
| Public Health & Urban Forum | Brendon Haggerty, Multnomah County | Max Nonnamaker, Mult. Co.* Ryan Ames, Washington County Leah Fisher, Clackamas County* |
| Non-Voting Chair | Eryn Kehe, Metro | Planning & Development Dept. |

*To be confirmed by MPAC

Memo

Date: February 14, 2024
To: Metro Policy Advisory Committee (MPAC)
From: Eryn Kehe, Metro Technical Advisory Committee (MTAC) Chair
Subject: MTAC Nominations for MPAC Consideration

BACKGROUND

The Metro Technical Advisory Committee (MTAC) is an advisory committee to the Metro Policy Advisory Committee (MPAC). MTAC's purpose is to provide MPAC with technical recommendations on growth management subjects, including technical, policy, legal and process issues, with an emphasis on providing policy alternatives.

PURPOSE

Nominations to fill MTAC member and alternate member positions are submitted for consideration and approval by MPAC according to committee bylaws. MPAC may approve or reject any nomination submitted.

RECOMMENDED MTAC APPOINTMENTS

Position: Largest City in Clackamas County: Lake Oswego
Nomination: **Jessica Numanoglu, alternate member**
Community Development Director, City of Lake Oswego

Position: Multnomah County: Other Cities
Nomination: **Dakota Meyer, alternate member**
Associate Planner, City of Troutdale

Position: Multnomah County
Nomination: **Graham Martin, alternate member**
Senior Transportation Planner, Multnomah County

Position: Service Providers: Parks
Nomination: **Kia Shelly, alternate member**
Planning & Development Director, North Clackamas Parks & Recreation District

Position: Service Providers: TriMet
Nomination: **Tom Mills, alternate member**
Director, Planning & Policy, TriMet

Position: Redevelopment/Urban Design

Nomination: **Brian Moore, member**

Development Manager, Development & Investment, Prosper Portland

Position: Redevelopment/Urban Design

Nomination: **Erin Reome, alternate member**

Principal Planner, North Clackamas Parks and Recreation District

Position: Commercial/Industrial

Nomination: **Greg Schrock, alternate member**

Associate Professor and School Director, PSU Toulon School of Urban Studies and Planning

Position: Public Health & Urban Forum

Nomination: **Max Nonnamaker, alternate member**

Built Environment & Transportation Program Specialist, Multnomah County Health Department

Position: Public Health & Urban Forum

Nomination: **Leah Fisher, alternate member**

Public Health Built and Natural Environment Analyst, Clackamas County

**6.1 Waste Prevention and Environmental Services:
Garbage and Recycling System Facilities Plan Update**

Information/Discussion Items

Metro Policy Advisory Committee
Wednesday, February 28th, 2024

MPAC Worksheet

Agenda Item Title: Garbage and Recycling System Facilities Plan – Phase 3 Engagement Summary

Presenters: Marta McGuire, Marissa Grass

Contact for this worksheet/presentation: Estee Segal

Purpose/Objective

Review and discuss project feedback on the Garbage & Recycling System Facilities Plan to inform future facility investment plan options for Metro Council consideration.

Outcome

This item is informational for MPAC members to understand what we did in phase 3, what we learned from project stakeholders, and what's next to get to a preferred scenario.

What has changed since MPAC last considered this issue/item?

Staff presented the results of engagement completed in Phase 2 to MPAC in January 2023. Engagement in Phase 2 focused on meeting with project stakeholders to identify gaps in the region's reuse, recycling and garbage facilities and infrastructure.

During the past year, Metro has engaged policymakers, local governments, community-based organizations, solid waste industry, reuse/repair nonprofits and businesses, and community leaders to explore options for meeting these gaps.

What We Did

Public engagement and outreach activities during scenario development and evaluation continued from March 2023 to January 2024. Outreach, consultation and engagement with interested sovereign Tribes in partnership with Metro's Tribal Affairs program are also summarized below and in Attachment 2.



Activities included:

- **Reuse/repair planning workshop (March 2023).** Leaders in the reuse and repair space were invited to a Phase 2 roundtable follow-up conversation with a slightly smaller group of reuse leaders. The objective of this session was to discuss ways

Metro could help fill facility gaps and support the reuse sector in the future. Input was used to identify a range of solutions to include in the scenarios.

- **Recycling Modernization Act (RMA) and System Facilities Plan at the Local Government Administrators Workgroup (March 2023).** Under the RMA, producers will be required to establish a minimum of 42 collection points in the greater Portland tri-county area at recycling depots and other locations. There is an opportunity to leverage the RMA with goals and aspirations of the System Facilities Plan by expanding and/or building depots or facilities that collect multiple materials in one place, not just those covered by the RMA. In partnership with the WPES RMA team, staff asked local governments about what role they may play in managing future depots. This discussion informed scenario options.
- **Regional education and outreach retreat (March 2023).** Attended by local government staff and regional education and outreach staff, this retreat included a topic on current barriers to accelerating community reuse and repair and ways the System Facilities Plan could address these challenges. This discussion informed scenario options.
- **Industry interviews (May and June 2023).** The project team conducted one-on-one interviews with owners and managers of garbage and recycling businesses in the Metro region. Questions explored the facilities they currently operate and any near-term investments or changes they expect to make, their business' preferred role in the regional system, their perspective on Metro's role and what they think Metro should do more or less of, and their experience and interest in public/private partnerships.
- **Symposium & survey (September 2023).** The Reuse, Recycling, and Garbage System Symposium consisted of a panel discussion followed by an interactive workshop to review four draft scenarios proposed for Metro's Garbage and Recycling System Facilities Plan. Input from workshop participants was collected through two mechanisms; written comments submitted during table discussions and an online survey. A summary of feedback is included in Attachment 1.
- **Waste Prevention and Environmental Services staff (October 2023).** Program and policy staff, as well as front-line staff working at Metro transfer stations, MetroPaint, and the RID Deployment Center were invited to provide input on the scenarios. Engagement opportunities included two Q&A sessions hosted by project staff and an opportunity to take the same survey as symposium participants.
- **Metropolitan Mayors' Consortium update (November 2023).** This meeting was an optional opportunity for Mayors to get more information and provide feedback on the System Facilities Plan scenarios, planned in conjunction with the Metropolitan Mayors Consortium.
- **Local government policy table (October and November 2023).** Discussion of the scenarios is also occurring at the Regional Waste Plan policy and budget development table. The purpose of this forum is to discuss policy and system

finance topics that are under consideration by Metro Council and will be discussed by the Regional Waste Advisory Committee (RWAC) or the Metropolitan Planning Advisory Group (MPAC) with local government representatives.

- **Workshop with Confederated Tribes of Siletz Indians Portland Area Office and Siletz tribal members in greater Portland (January 2024).** This was a virtual workshop organized in collaboration with staff from the Confederated Tribes of Siletz Indians (CTSI) Portland Office. CTSI members who live in the greater Portland area heard an overview of the System Facilities Plan scenarios from project staff. Among other things, participants discussed their interest in understanding the potential impacts of different types of facilities on the environment and human health, particularly for communities of color and low-income communities; and expressed a desire for Metro to do more to address plastic pollution, create stronger incentives for recycling and work closely with the state on implementation of the Recycling Modernization Act. Workshop participants were asked to take the same survey as symposium participants.
- **Workshop with Adelante Mujeres and Unite Oregon (January 2024).** Met with members of these community-based organizations, who are also recipients of Metro’s Waste Prevention and Environmental Services civic engagement grants. Both workshops were held in Spanish and participants shared feedback about System Facilities Plan scenarios, asked questions about the project, and shared ways they wanted to be involved in the future of the system.

Ongoing engagement:

- **Community Advisory Group.** Metro convened community members who represent diverse viewpoints and experiences to advise on the System Facilities Plan as it is being developed. The group is helping to advance racial equity in the development of the plan, identify service gaps, and advise on benefits and impacts of future facilities and services. The advisory group met six times in Phase 3, including a facility tour.
- **Metro advisory committees.** Updates and engagement at meetings of the Regional Waste Advisory Committee, Committee on Racial Equity and the Metropolitan Policy Advisory Committee.
- **Tribal Government consultation and engagement.** Project staff and Metro’s Tribal Affairs program invited consultation and engagement with multiple Tribes starting in Fall 2022. Metro staff have continued to explore interest in the project with Tribes and provided project updates and presentations as requested. Staff will continue to invite engagement in the plan development, scenario(s) selection and future implementation with interested Tribes.

Metro Council

- **International panel at Metro Council work session (September 2023).** Metro Council had an opportunity to hear directly from international panel members and

ask questions. This recording is available to folks who did not attend the symposium.

- **Garbage and Recycling System Facilities Plan proposed scenarios (November 2023).** Informational session to review alternative facility investment scenarios with Metro Councilors, answer questions and seek early input on preferred scenario elements.

What packet material do you plan to include?

1. SFP Symposium Workshop Summary Report
2. SFP Tribal consultation summary

Metro Garbage & Recycling System Facilities Plan Phase 3 Workshop Summary Report

Executive summary

Purpose

Metro is engaging with stakeholders from local government, industry, and reuse and repair organizations as well as other community members with diverse identities and lived experience to guide the development of the Garbage and Recycling System Facilities Plan. The purpose of the plan is to identify facility investments that reduce waste, increase access, and keep ratepayer costs affordable. The plan will consider investment in current facilities – including Metro’s two transfer stations – and new facilities like reuse and recycling centers.

This report summarizes findings from a stakeholder engagement workshop and survey in Phase 3 of the project. The workshop was part of the Reuse, Recycling, and Garbage System Symposium, hosted by Metro’s Waste Prevention and Environmental Services Division at the Oregon Convention Center on September 27, 2023. Additional survey input will be reported as engagement continues during Phase 3.

Phase 3 Workshop

The Reuse, Recycling, and Garbage System Symposium consisted of a panel discussion followed by an interactive workshop to review four draft scenarios proposed for Metro’s Garbage and Recycling System Facilities Plan. The scenarios were assessed using evaluation criteria developed in phase 2 of the project and presented to workshop participants, following the [Workshop Discussion Guide](#). The scenarios represent different ways of responding to the gaps identified through engagement and technical analysis.

The input shared by workshop participants will help inform Metro Council’s decision on a preferred scenario. The preferred scenario or combination of scenario components will move forward into phase 4 of the System Facilities Plan for more analysis, including developing a detailed funding and implementation strategy.

In this report

Executive Summary

- Key findings
- Input mechanisms
- Who we heard from





Workshop findings

- Preferred scenarios
- Most important information in selecting a preferred scenario
- Preferred scenario components
- Scenario evaluation and feedback
- Increase to monthly collection bills

Appendices

- Small Group Comments
- Survey Report

Draft Scenarios Considered

| Baseline | Full-Service | Distributed | No-Build |
|--|---|--|---|
|  |  |  |  |
| Metro does not build new facilities or address facility gaps, but maintains current facilities | Metro builds four large transfer stations and two new reuse facilities | Metro builds a network of distributed mid-sized facilities across the three counties | Metro increases requirements, invests in private facilities and renovates existing facilities |

Key findings

- Workshop participants indicated the most support for components included in the Distributed (public facilities that include reuse and recycling centers) and No-build (fee to invest in reuse organization) scenarios.
- Participants also showed substantial support for new reuse and repair facilities, and a role for Metro in providing space and investment to support organizations offering reuse and repair.
 - Across groups, there was support for including reuse and recycling services at public facilities.
 - As a group, private industry participants were also supportive of Metro investing in private facilities.
- Many comments indicated an important role for Metro in providing education and outreach, and that this work is needed to support changes to the reuse, recycling and garbage system.
- Metro's use of regulatory tools is not favored by most participants, especially the mandatory subscription to curbside service. Regulating rates private facilities charge was only moderately supported.
- Metro building new full-service transfer stations was not well supported by many participants, but there is more support for mid-sized facilities.
- Concern about costs: Participants did not support large new costs for customers, and some asked for more information about how cost estimates were developed or questioned their accuracy.

Input mechanisms

Input from workshop participants was collected through two mechanisms; written comments submitted during table discussions and an online survey.

- Written comments were requested from workshop participants regarding the description and presentation of evaluation results for each scenario. Participants discussed each scenario in a table group with the assistance of a facilitator and posted their comments at their table. Written comments are not associated with a participant role.
- Workshop participants were asked to complete an online survey at the end of the workshop and the survey link was provided via email after the event. A total of 50 workshop participants

provided input through the survey. The survey responses are associated with a respondent roles.

Who we heard from

Approximately 80 participants attended the workshop and were supported by approximately 36 staff members from Metro and the consultant team.

Among the 50 participants who completed the survey, the largest share (30) identified their role as members of private industry, followed by community and local government (both at 16 people), and reuse/repair organizations (14), as shown in Figure 1. Among private industry participants, specific roles were identified, as shown in Figure 2. Survey respondents were able to indicate multiple roles.

Figure 1: Workshop survey participant roles by type (n=47)

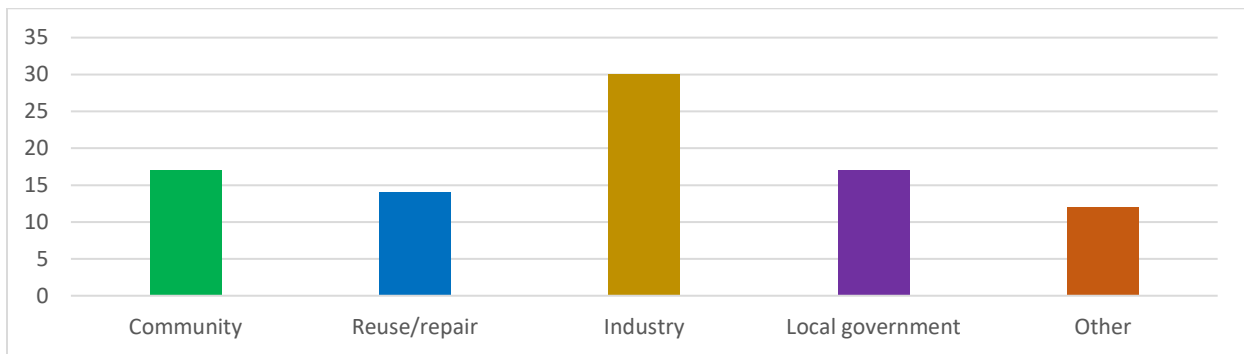
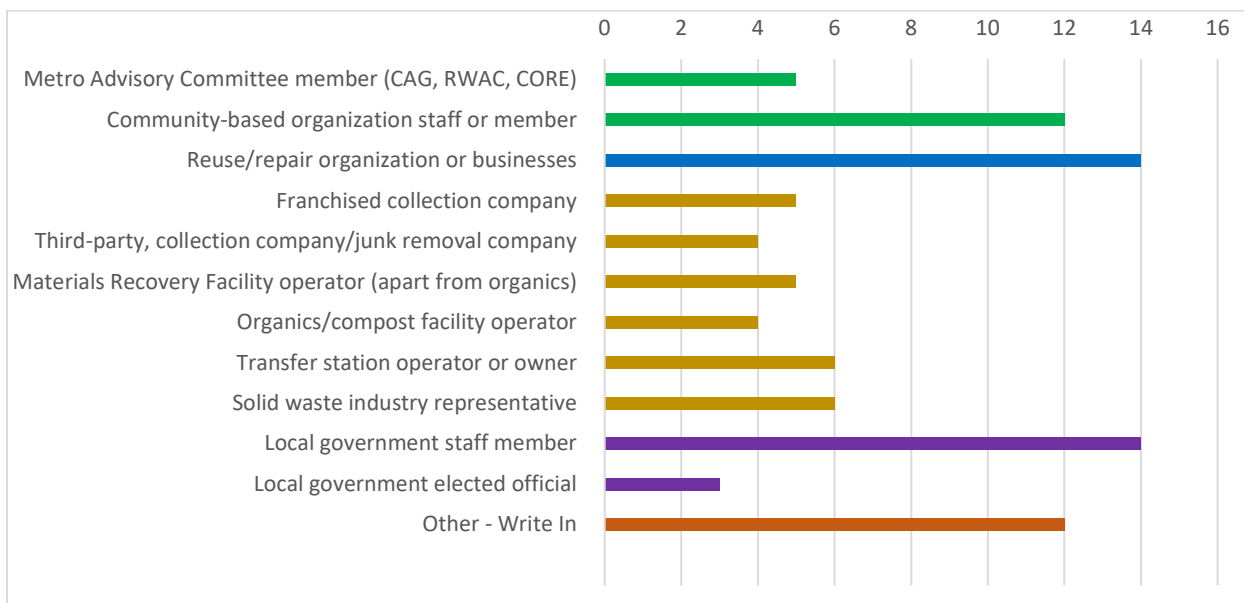


Figure 2: Workshop survey participant roles, detailed



Workshop findings

Preferred scenarios

Survey respondents were asked to identify their preferred scenario from those presented at the workshop. As shown in Figure 3, 62 percent of respondents identified the Distributed Scenario as their preference, followed by the No-build Scenario (22 percent), Full-service (10 percent), and Baseline (6 percent). Over 80 percent of survey respondents said they would make changes to their preferred scenario.

Notable differences among subgroups of survey respondents (Figure 4) include:

- Local government and reuse/repair respondents indicated a preference for the Distributed scenario by a much larger margin compared to private industry participants
- No private industry or reuse/repair respondents identified Full-service as their preferred scenario
- The Full-service scenario was identified as preferred by a larger share of community respondents than the No-build scenario

Figure 3: Preferred scenarios (n=49)

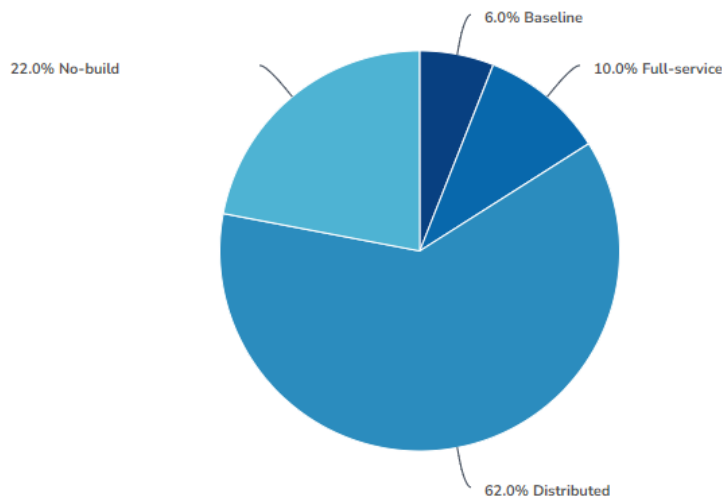
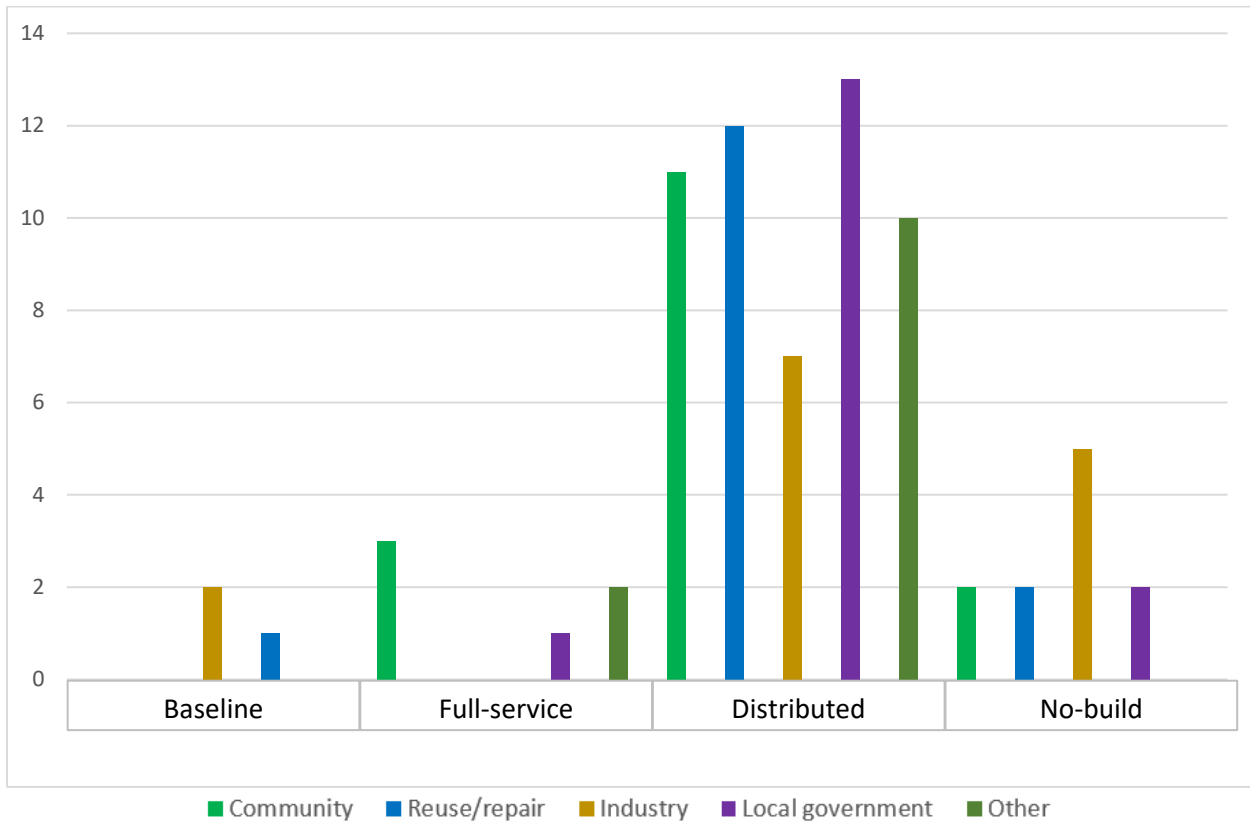


Figure 4: Preferred scenarios by stakeholder role (n=50)



Most important information in selecting a preferred scenario

Survey respondents were asked what information was most important to them in selecting a preferred scenario. Figures 5, 6 and 7 show the ranking of most important information for the respondents that identified, Full-service, Distributed, and No-build scenarios respectively. For all three of the scenarios apart from the Baseline, respondents indicated services available to the general public was the most important information in selection their preferred alternative.

The **Full-service scenario** (Figure 5) was selected by the smallest number of respondents with just four people who indicated it was their preference. For those respondents, “how the scenario meets policy priorities for waste reduction, access, and affordability” ranked second after “services available to the general public.”

For respondents who indicated the **Distributed scenario** (Figure 6) as their preference, “how the scenario meets policy priorities for waste reduction, access, and affordability” similarly ranked second most important, with “services available to commercial haulers” ranked as the least important.

For respondents who indicated the **No-build scenario** (Figure 7) was their preference, “improvement to private facilities” was the second most important information, with “services available to commercial haulers” and “how this scenario performed in the evaluation” ranking lowest.

Full-Service

Figure 5: Important information in choosing a preferred scenario, Full-Service



Distributed

Figure 6: Important information in choosing a preferred scenario, Distributed



No-Build

Figure 7: Important information in choosing a preferred scenario, No-Build



Preferred scenario components (Build your own scenario results)

Workshop participants were asked through the survey to indicate which scenario components they would include in their own scenario. The views of industry participants varied most from all workshop participants among the respondent roles. Additional results from survey input are shown in figures 8 and 9.

The components **most often selected** across groups include:

- **Public facilities that include reuse and recycling centers** was among the most favored scenario components across all participant roles.
 - Over half of participants across *all roles* included this component in their preferred scenario.
 - This component scored lower among local government participants.
- Over half of participants favored a **dedicated fee to invest in reuse organizations**.
 - Such a fee was most favored by reuse and repair participants.
 - Local government participants showed lower support for a dedicated fee to invest in reuse organizations, and private industry participants favored such a fee the least out of respondent groups.
- The **regional reuse mall** and **regional reuse warehouse hub** components scored similarly and were included in just less than half of respondents' preferred scenarios.
 - These new reuse facilities were most supported by reuse/repair participants, followed by community participants.
 - They were least often favored by local government and private industry participants.

The scenario components **least often selected** include:

- **Mandatory subscription to garbage curbside service** was supported least of all the scenario components offered. It was included most often by private industry participants, 25 percent of whom included it in their preferred scenario.
- **Large transfer stations** were most supported by local government participants with just under 30 percent of this group including it in their preferred scenario.
- More than half of private industry participants included **redevelop Metro Central and Metro South transfer stations** (with Metro not building other facilities) in their preferred scenario, however this component was not included by more than half of any other group apart from Metro staff.

Scenario components among **neither the most nor least selected** include:

- Over half of community respondents included **commercial facilities that include mid-sized transfer stations** in their preferred scenario, but that was not true for any other group apart from Metro staff.
 - Mid-sized transfer stations were included by more respondents across all groups compared to the large transfer stations component

- Among the components with the largest difference in survey results between respondent groups, a **program to invest in expanding/adding services at private facilities** was tied with public facilities that include reuse and recycling centers as the most popular component among private industry participants, but the least popular for community and reuse/repair participants.
- **Required expansion of curbside programs** was not included by more the half of any of the respondent groups but was more often selected by community and reuse/repair participants.
- **Regulate rates that private facilities charge commercial customers** was the least popular of any of the scenario components for private industry respondents with just 8 percent including it in their preferred scenario. However, about 40 percent of local government and community participants selected this component.

Figure 8: Components of preferred scenarios - All survey participants (n=48)

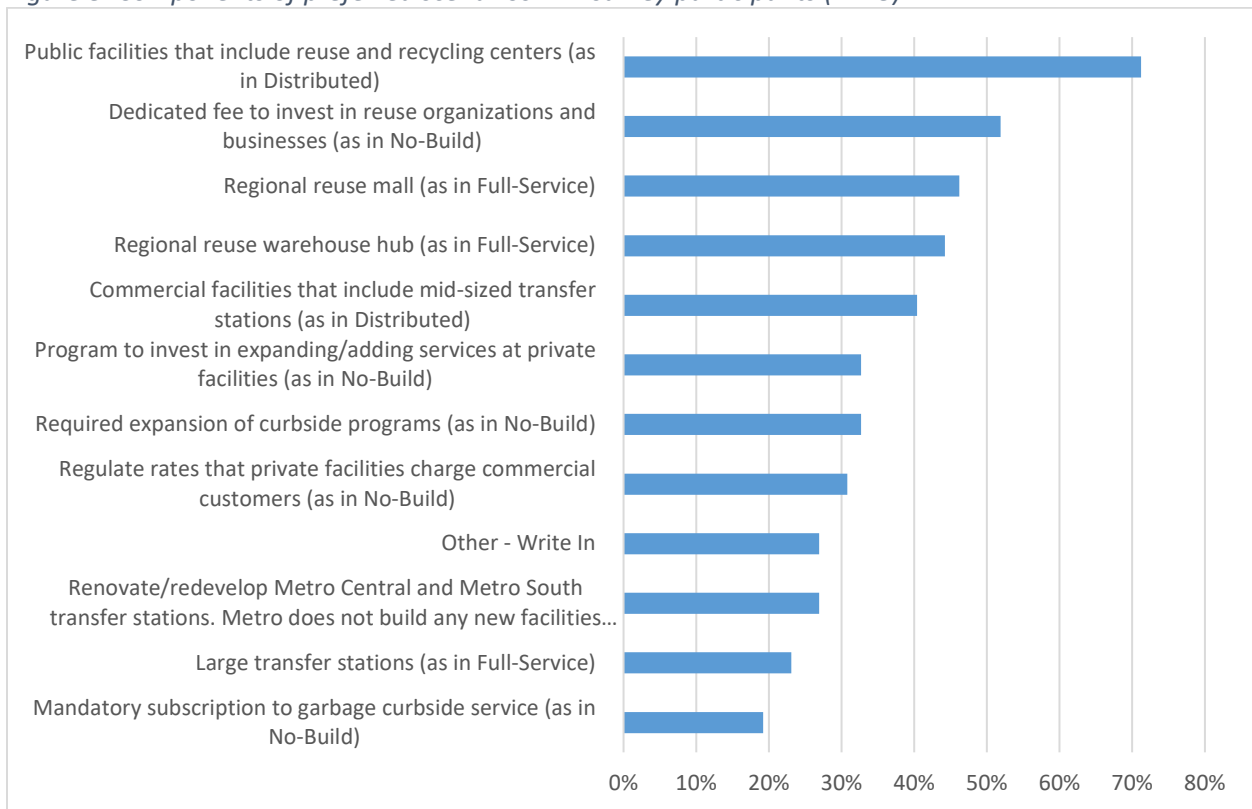
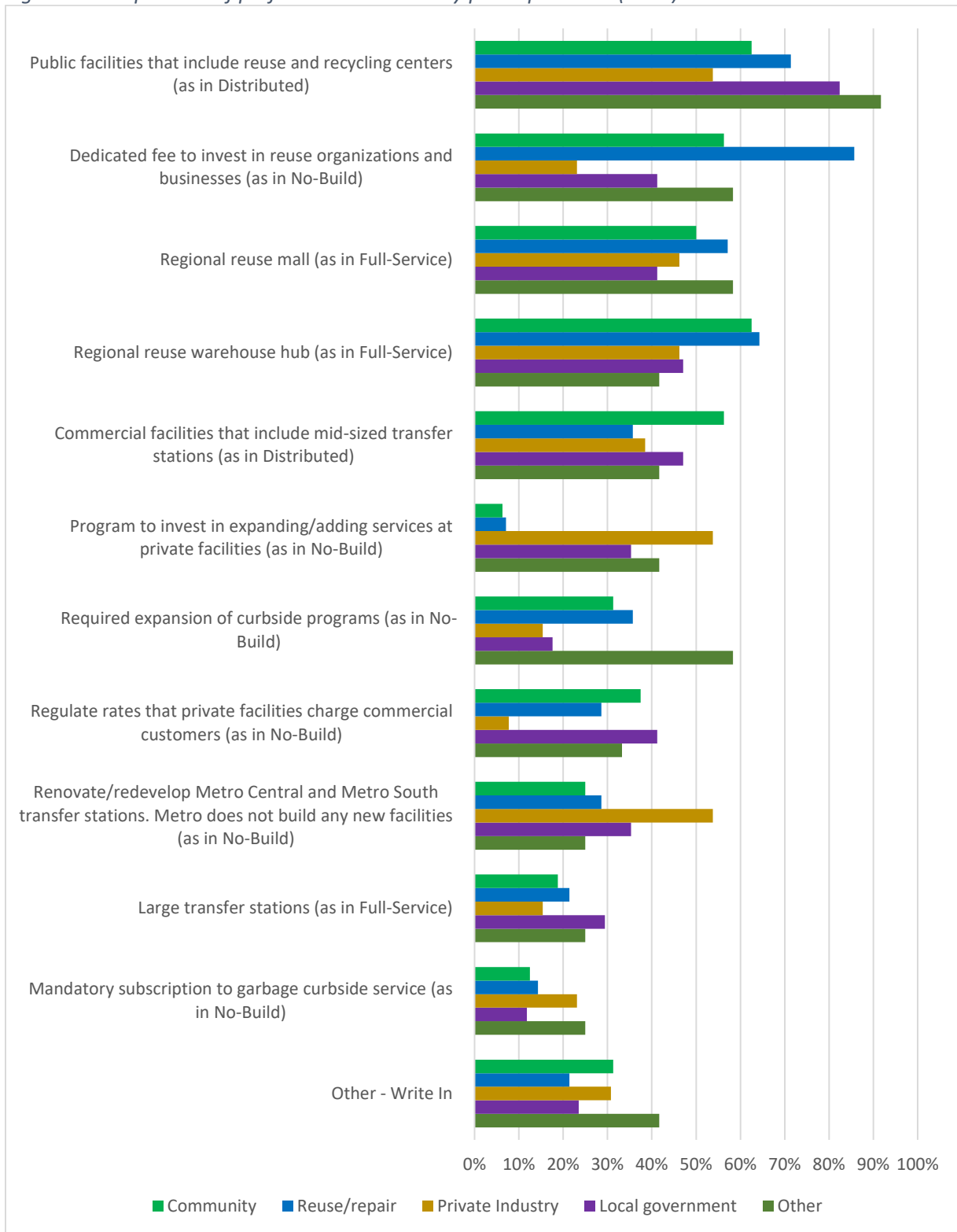


Figure 9: Components of preferred scenarios – By participant role (n=48)



Scenario evaluation and feedback through small group discussions

Workshop participants were invited to discuss each of the draft scenarios in small groups and then provide written comments. The comments follow a “Rose, Bud, Thorn” framework, with discussion prompts of:

- Rose: What aspects of each scenario do you like most and why?
- Bud: What changes would you make to improve each scenario?
- Thorn: What aspects of each scenario do you like least and why?

Comments from small groups discussions were compiled and analyzed for themes. The most prominent themes by scenario and comment type, as well as the counts for all comment types, are summarized below. The comment counts are useful for understanding and comparing the relative prominence of each theme. The exercise was not designed to assess a representative sample, and individual comments were assigned multiple themes. The full list of comments is provided in *Appendix A: Small Group Comments*.

Full-Service Scenario

Roses - Full-Service Scenario

| Comment themes | Counts |
|--|--|
| <p>Reuse/Repair: Many comments were supportive of the reuse mall concept and the community benefits it would provide including community education. Commentors also said that the reuse hub concept would provide needed capacity and support, and opportunity for collaboration among reuse organizations.</p> | <ul style="list-style-type: none"> • Reuse/repair (33) • Access (23) • Capacity (12) • Other comment themes <ul style="list-style-type: none"> ○ Washington County (5) ○ Environment (4) ○ Multnomah County – East (4) ○ Jobs (3) ○ Cost (3) ○ Project process (3) ○ Self-haul (2) ○ Metro’s role (1) ○ Organics (1) ○ HHW (1) ○ Clackamas County (1) |
| <p>Access: Many comments were also supportive of increased access provided by the Full-Service scenario in providing new facilities in both Washington County and East Multnomah County. Many commentors appreciated the idea of a “one-stop-shop” where people could access multiple services.</p> | |
| <p>Capacity: Comments were supportive of increased space leading to operational efficiency, labor efficiency, material consolidation, and community-facing benefits.</p> | |

Buds - Full-Service Scenario

| Comment themes | Counts |
|---|---|
| <p>Project process: Questions and suggestions about the specifics of this scenario such as how it relates to the Recycling Modernization Act (RMA) and land use considerations and</p> | <ul style="list-style-type: none"> • Project process (19) • Reuse/repair (16) • Access (15) |

challenges in facility siting. Some comments requested more detail about how the scenario would work, how reuse/repair partners would be selected and how existing businesses would be incorporated.

Reuse/repair: Comments about the opportunity to divert more items to reuse and about including existing reuse organizations. Many also called for multiple reuse malls in a “hub and spoke” model. Other comments included suggestions to include reuse organizations in program design and facility operations, and that maximum value in reuse items is encouraged by including items specifically designed for reuse, items that are “higher-end” or refurbished. A comment suggested adding another reuse hub to the scenario.

Access: Some commentors suggested providing options for garbage disposal at reuse hubs, and/or providing additional transportation options to enhance the convenience of facilities for customers, especially those without access to a vehicle.

Cost: Commentors offered ideas around funding the facilities expansion in the Full-Service scenario, which included funding from producers, from government grants at different levels, and from consumers of products for reuse (ensuring reuse companies are able to recoup their costs as well).

Metro’s role: Comments said there would be a need for additional education under the scenario. Another commenter said there should be an opportunity, along with the RMA provisions for haulers and other businesses to expand their current facilities and programs to better meet demand.

Capacity: There was a request to not impact wet waste tonnage allocations because they felt there is existing capacity in the system.

- **Cost (12)**
- **Metro's role (10)**
- **Capacity (8)**
- Other
 - Environment (5)
 - EJ (5)
 - Washington County (4)
 - Organics (4)
 - Self-haul (3)
 - Multnomah County – East (1)
 - HHW (1)
 - Resilience (1)
 - Multnomah County – Central (1)

Thorns – Full-Service Scenario

| Comment themes | Counts |
|--|---|
| Access: Comments said the scenario fails to improve access for people lacking cars/transportation, despite higher cost. | <ul style="list-style-type: none"> • Access (16) • Capacity (14) • Cost (13) • Reuse/Repair (11) • Metro's role (9) • Other: <ul style="list-style-type: none"> ○ Project process (8) ○ Environment (7) ○ Jobs (5) |
| Capacity: Comments about the difficulty of finding/building large buildings or questioning the need for more facilities given current capacity. | |
| Cost: Some thought the scenario would be too costly, particularly for those less able to afford, and that costs should | |

be shifted to producers. There was also a comment that existing transfer stations would be challenging to rebuild.

Reuse/Repair: Comments shared concerns about two reuse hubs being enough or accessible to the whole region, and the costs to build and staff the facilities.

Metro's role: There were also comments that the role for Metro would be too large.

- EJ (2)
- Washington County (2)
- HHW (2)
- Multnomah County – East (1)
- Clackamas County (1)

Distributed Scenario

Roses - Distributed Scenario

| Comment themes | Counts |
|--|---|
| <p>Access: Workshop attendees most often noted appreciation for improved access provided by this scenario. Comments included that access would improve for Washington County as well as in East Multnomah County.</p> <p>Reuse/repair: Many comments in support of distributed reuse/repair hubs to reduce waste and encourage reuse of items. Commentors also said the distributed scenario scored well for reuse/repair, cost, and self-haul services.</p> | <ul style="list-style-type: none"> ● Access (18) ● Reuse/repair (11) ● Other: <ul style="list-style-type: none"> ○ Cost (5) ○ WashCo (5) ○ Self-haul (4) ○ Capacity (2) ○ Jobs (2) ○ EJ (2) ○ Project process (2) ○ HHW(2) ○ Environment (1) ○ Resilience (1) ○ Metro's role (1) ○ Multnomah County - East (1) |

Buds - Distributed Scenario

| Comment themes | Counts |
|--|--|
| <p>Reuse/repair: Comments in support of the reuse/repair hub model included specific suggestions like, make sure there are hubs on each side of the river, providing educational components like classroom space to teach about fast fashion and other waste reduction topics, and urging the current reuse organizations be involved/funded.</p> <p>Access: Some commentors suggested expanded curbside collection for better accessibility for people without vehicle access, and for more drop-off locations for convenience.</p> | <ul style="list-style-type: none"> ● Reuse/repair (22) ● Access (13) ● Metro's Role (11) ● Project process (10) ● Other: <ul style="list-style-type: none"> ○ Capacity (8) ○ EJ (6) ○ Environment (6) ○ Self-haul (4) |

Metro’s Role: Comments about the roles of Metro and others, including advocating for the inclusion of non-profits, for-profits, and small business partners. Commentors also recommended robust outreach and education campaign for the distributed scenario, support for washing facilities for reuse.

Project process: Many comments noted a lack of clear details for this scenario since the facilities would be provided by private and non-profit organizations.

- Multnomah County - Central (3)
- Cost (2)
- Multnomah County – East (2)
- Washington County (1)
- Jobs (1)
- Resilience (1)
- Organics (1)

Thorns - Distributed Scenario

| Comment themes | Counts |
|---|--|
| <p>Capacity: Concern that the distributed model would not have ‘economies of scale’, small hubs may not have the space required for repair services, that hubs would lack sufficient staffing for proper customer education, or that there isn’t enough need for so many facilities especially when accounting for the presence of services like Ridwell.</p> <p>Access: Concerns that this model doesn’t address the needs of people without access to transportation, or that facilities will not be conveniently located for some.</p> | <ul style="list-style-type: none"> ● Capacity (15) ● Access (9) ● Other <ul style="list-style-type: none"> ○ Cost (7) ○ Project process (7) ○ Reuse/repair (6) ○ HHW (3) ○ Environment (2) ○ Jobs (2) ○ EJ (2) ○ Washington County (1) ○ Clackamas County (1) ○ Metro's role (1) ○ Organics (1) |

No-Build Scenario

Roses - No-Build Scenario

| Comment themes | Counts |
|--|---|
| <p>Metro’s Role: Comments in favor of regulated fees of public and private transfer stations.</p> <p>Reuse/repair: Comments in favor of investing in current reuse organizations and the convenience for customers who would benefit from dropping off items at existing facilities.</p> | <ul style="list-style-type: none"> ● Metro's role (6) ● Reuse/repair (5) ● Other <ul style="list-style-type: none"> ○ Project process (4) ○ Self-haul (3) ○ Access (3) ○ Capacity (3) ○ Cost (2) ○ HHW (2) ○ Washington County (2) ○ Organics (1) |

Buds - No-Build Scenario

| Comment themes | Counts |
|--|--|
| <p>Cost: Many comments about the need for a reuse fee being a contract and not a grant or loan. Some noted concerns that this would increase consumer costs or that curbside service should be optional for customers who don't need additional services. Some commentors said investments in private facilities should not prioritize companies who own landfills.</p> | <ul style="list-style-type: none"> ● Cost (13) |
| <p>Reuse/repair: Some thought the scenario would support increased reuse through added convenience from investment in reuse opportunities, like haulers that specialize in reuse and more community collections events.</p> | <ul style="list-style-type: none"> ● Reuse/repair (9) |
| | <ul style="list-style-type: none"> ● Other <ul style="list-style-type: none"> ○ Project process (6) ○ Access (6) ○ Metro's role (3) ○ WashCo (3) ○ EJ (3) ○ Environment (2) ○ Bulky Waste (2) ○ HHW (1) ○ Organics (1) ○ Jobs (1) ○ Multnomah County - East (1) ○ Multnomah County - Central (1) |

Thorns - No-Build Scenario

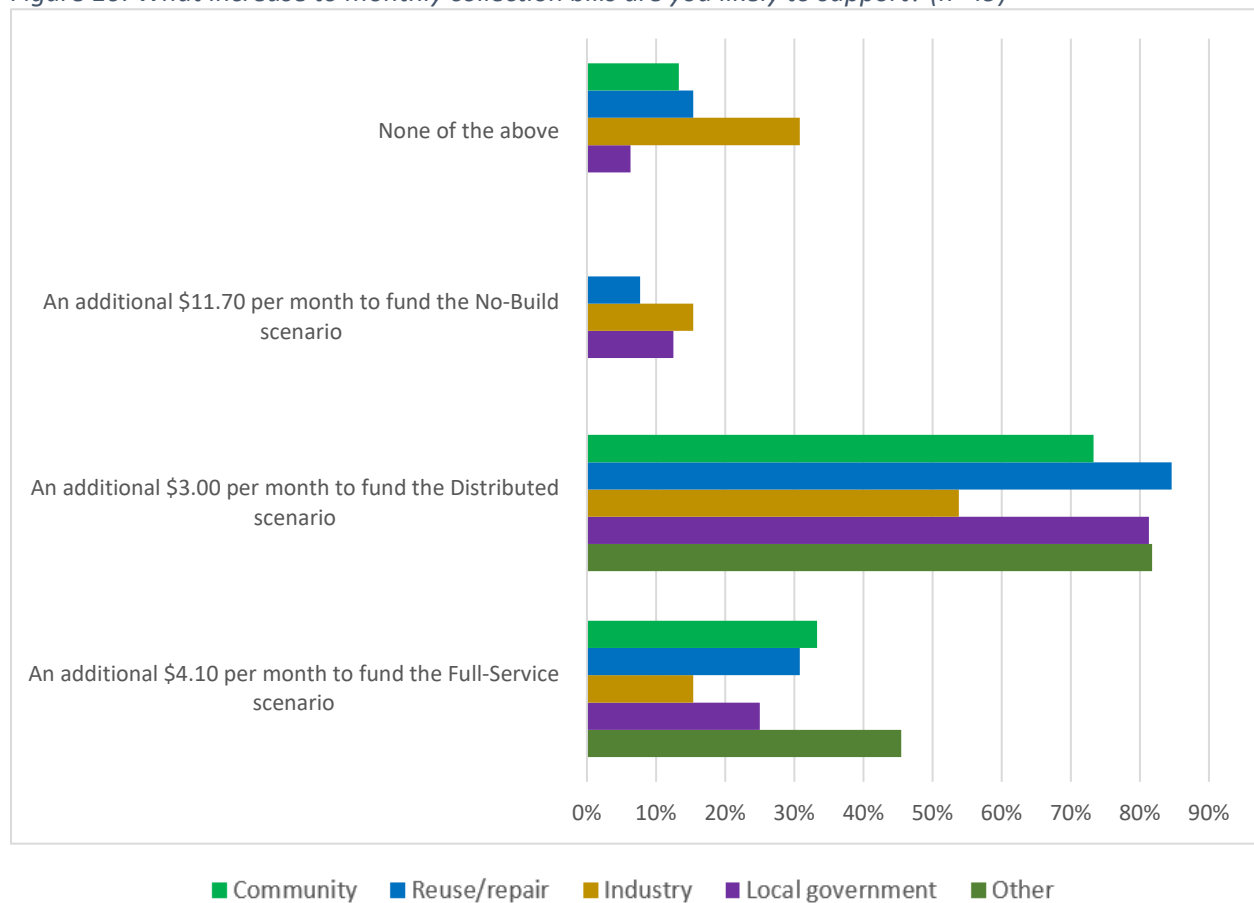
| Comment themes | Counts |
|--|--|
| <p>Cost: Many commentors said large costs would burden customers. Some commentors noted the high cost to renovate existing transfer stations.</p> | <ul style="list-style-type: none"> ● Cost (17) |
| <p>Project process: Some commentors dislike the idea of requiring residents to subscribe to new services and had questions about the cost analysis.</p> | <ul style="list-style-type: none"> ● Project process (10) |
| <p>Capacity: Some commentors said renovating the Metro South Transfer Station would be very difficult and an additional facility would be needed during the renovations. Comments also suggested the scenario lacks space for reuse/repair and that Metro setting rates could result in existing private transfer stations closing.</p> | <ul style="list-style-type: none"> ● Capacity (8) ● Metro's role (8) |
| <p>Metro's role: Some thought the scenario was too burdensome to business and local government, that local government deserves more consultation, and that the buildout of this scenario is not well understood.</p> | <ul style="list-style-type: none"> ● Other comments: <ul style="list-style-type: none"> ○ Access (5) ○ Reuse/repair (4) ○ Environment (2) ○ HHW (2) ○ Clackamas County (2) ○ WashCo (1) ○ Jobs (1) ○ Self-haul (1) |

Increase to monthly collection bills to pay for future facility investments

When asked what increase to monthly single-family collection bills they are likely to support to pay for future facility investments, most survey respondents across audience roles indicated support for an increase of \$3.00 (Figure 10). Notable observations from responses to the question include:

- An increase of \$3.00 was supported by over 80 percent of reuse/repair and local government respondents.
- There was little support, across all groups, for the highest cost of \$11.70, as in the No-Build scenario.
- Industry respondents had the most divergent responses from all survey participants, with about 30 percent of respondents indicating they supported none of the price options provided. Most members of this group responded that they supported no increase in monthly single family collection bills.

Figure 10: What increase to monthly collection bills are you likely to support? (n=49)



Appendices

Appendix A: Small Group Comments

Appendix B: Survey Report

ATTACHMENT 2

Metro Council Work Session – January 30, 2024

Garbage and Recycling System Facilities Plan

Tribal consultation summary

In September 2022 Metro invited consultation with seven Tribes who have engaged with Metro's Tribal Affairs program and have distinct historical and contemporary interests and connections to what is now known as the greater Portland area.

Initial discussions of the GRSFP occurred in several ongoing regular coordination meetings with interested Tribes during the late Fall in 2022 and early into 2023. To aid in Tribes' respective consideration of consulting and engaging with Metro on the GRSFP, Metro staff proactively identified and shared potential areas for coordination with Tribes that included topics such as: climate change adaptation and mitigation priorities, natural resource protection and conservation priorities, and historic and cultural resources protection priorities and notification processes for any activities including ground disturbance. Metro staff also proposed discussion regarding interested Tribes' consultation preferences for future phases of the GRSFP such as when the plan and potential selected scenario(s) is being implemented by Metro staff and partners.

Input to date from responding Tribes highlighted the importance of protecting the environment and natural resources in the potential siting, construction, modification and operation of any existing or new garbage or recycling facilities in greater Portland in the selection of any scenario. Input also highlighted the importance of protecting archeological, cultural or historic resources in these same activities in any scenarios, especially as undeveloped land available for construction of new transfer stations could be in areas where there is a high probability of the presence of significant cultural or historic resources.

Staff representing one Tribe's cultural resources program also expressed a desire for Metro to strategically consider and plan for changes in demand for access to recycling and garbage that will occur over time with growing populations with the scenarios currently under consideration by Council. More specifically, they requested that Metro consider how the potentially selected scenario(s) could meet increasing demands for services over time. The concern is that limited planning for service demand over time could lead to the need to construct another transfer station in the future to meet regional needs. Input shared that long term demand forecasting is important to consider now as each instance of construction of a new transfer station facility or modification of an existing facility to a larger capacity has the potential to impact natural, archeological, cultural and historic resources important to the Tribe.

Metro's Tribal consultation and engagement invitations also led to a request from one Tribe for future project notification processes for new construction of any facilities or citing of new facilities

in the greater Portland area to be addressed to the Tribe's natural and cultural resources program offices.

Metro's consultation invitation also led to a request by the Portland Area Office of the Confederated Tribes of Siletz Indians for a community member conversation on the Garbage and Recycling System Facilities Plan with Siletz tribal members who reside in the greater Portland area. A summary of this engagement is provided on page 3 of the staff report.

The project team and Tribal Affairs program have continued to provide updates on the GRSFP project and supported discussions about the project as requested by interested Tribes. Additional discussion and meetings are anticipated as Metro works to further understand tribal interests in this project and tribal priorities that should inform the selection and implementation of a potential scenario(s) as well as Metro's garbage and recycling work more broadly.

**6.2 2024 Urban Growth Management Decision: Draft Regional Population,
Household, and Employment Forecast**

Information/Discussion Items

Metro Policy Advisory Committee
Wednesday, February 28th, 2024

MPAC Worksheet

Agenda Item Title: 2024 urban growth management decision: draft regional population, household, and employment forecast

Presenters: Josh Harwood, Fiscal and Tax Policy Director, Metro; Ted Reid, Principal Regional Planner, Metro; Dennis Yee, Economist, Metro

Contact for this worksheet/presentation: Ted Reid

Purpose/Objective

The purpose of this item is to continue MPAC's engagement in growth management topics so that it is prepared to advise the Metro Council on its regional growth management decision in late 2024.

Under state law, Metro must assess – at least every six years – whether there is a regional need to expand the urban growth boundary (UGB) to ensure adequate room for 20 years of expected housing and job growth. UGB expansions are only allowed if there is a demonstrated regional need for more land. To assess that demand, Metro begins by forecasting regional population, household, and employment growth. This draft forecast has been reviewed by external economists and demographers.

At the February 28, 2024 meeting, Metro staff will present the draft regional population, household, and employment forecast. This analysis and others will be incorporated into a draft 2024 Urban Growth Report (UGR) that will be released in the summer of 2024.

Outcome

MPAC members are aware of the technical analyses and review processes that will inform their recommendation to the Metro Council for the 2024 urban growth management decision. MPAC members can ask questions of Metro staff and discuss the implications of the draft forecast.

What has changed since MPAC last considered this issue/item?

At its January meeting, MPAC heard from an expert panel of demographers and economists about the trends that influence their thinking about future population and employment growth. Some of those same experts have recently participated in a review of Metro's draft forecast. A summary of their review is attached.

What packet material do you plan to include?

Summary of the peer review of Metro's draft regional forecast.

2024-2044 regional population, household, and employment forecast:

Expert panel review summary

Context

On January 30, 2024, Metro staff convened an expert panel of economists and demographers to review the preliminary regional forecast that will be part of the 2024 Urban Growth Report. This review is intended to identify areas of agreement or disagreement among experts in forecasting. The group is advisory to Metro staff. The following summary describes the topics brought forward in the forecast review, staff reasoning, as well as expert panelist views on those topics.

Main takeaways

The long-term trend of declining birth rates will lead to slower population growth rates

Metro's forecast for slower population growth is aligned with other forecasters' assessments. Specifically, panelists agreed that declining birth rates will mean that deaths will begin to outnumber births in the next decade. That negative natural change is expected to continue after that point, and without positive net migration, the region would begin to lose population. This expected slowdown is not because of the pandemic, the ensuing 2020 recession, or because of recent out-migration from the region. It is because of demographic shifts.

Panelists believe there is considerable uncertainty around migration, but that Metro's assumption, based on historic averages is reasonable. Panelists advised Metro to be clear about this uncertainty and that high cost of living on the west coast may lead to lower net in-migration.

Panelists indicated that, while intuition supports the notion that the region may see increased migration from climate refugees drawn to the Pacific Northwest's temperate climate, there is currently no observable evidence that this is happening. Panelists did not recommend building in an add-factor for climate induced migration at this time.

Employment growth will slow because of declining population growth rates

External experts agree that population growth is inextricably tied to employment growth and that slowing population growth would lead to slowing employment growth. Both are expected to grow at 0.4 percent per year over the forecast period. This is less than historic growth rates.

Panelists felt that Metro's preliminary employment forecast looked right in total, but that it was too optimistic about the CHIPS Act and its impacts on computer and electronics manufacturing and metal fabrication. Peer reviewers indicated that the CHIPS Act will primarily prevent manufacturing job losses that would otherwise occur in the next 10 years. Longer term, they expect manufacturing employment to be flat. In response, Metro staff has adjusted the computer and electronics and metal fabrication sectors downward slightly. The result is that manufacturing employment— after an initial increase in the next five to ten years—returns (declines) to pre-pandemic levels by the end of the 20-year forecast period.

NOTE: graphs included in this document are ones that were discussed by the peer review panel. As such, they may differ from the eventual draft or final regional forecast because staff has made adjustments based on expert feedback.

Expert panelists and Metro economics staff

Panelists

Peter Hulseman, City Economist, City of Portland

Neal Marquez, Forecast Program Manager, Portland State University Population Research Center

Ethan Sharygin, Director, Portland State University Population Research Center

Amy Vandervliet, Economist, Oregon Employment Department

Metro economics staff

Josh Harwood, Director of Fiscal and Tax Policy

Katelyn Kelley, Economist

Dennis Yee, Economist

Panel discussion

National macroeconomic conditions

Metro staff presented data on recent national gross domestic product (GDP) as well as GDP projections from S&P Global | IHS Markit. The national outlook shows GDP returning to a slow growth trend after seeing variability during the pandemic. The national outlook does not include another recession, but instead points to a “soft landing” from a period of high inflation.

National population

Metro staff presented national population growth rate forecasts which depict slowing population growth rates. By the end of the forecast period, average annual population growth rates are expected be at 0.4 percent, down from the 0.9 percent rate for the previous 30 years. Panel members suggested comparing this IHS Markit data to 2023 Census data but indicated that those data show a similar trend and forecast.

Year % Change Total Population

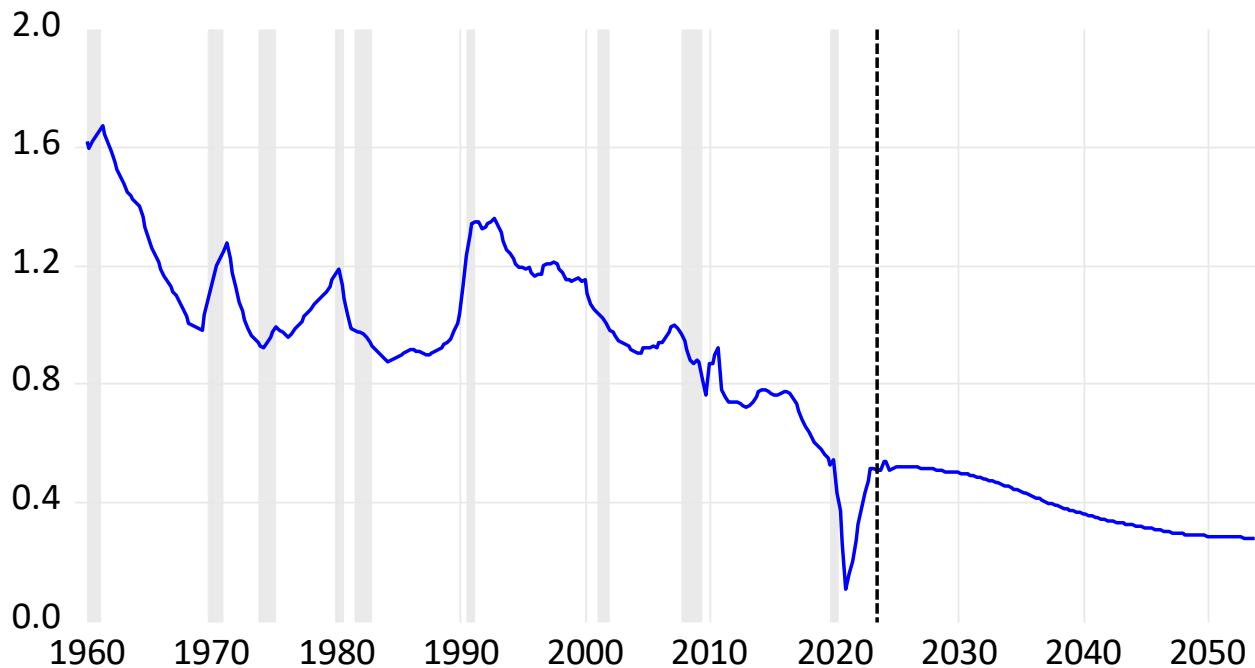


Figure 1: Annual percent change in total U.S. population (source: IHS Markit)

Declining birth rates are a main driver for slowing population growth rates. Though average life expectancy is expected to increase, the continued aging of the Baby Boomer generation will contribute to higher numbers of deaths in the next two decades. At the national level, deaths now outnumber births.

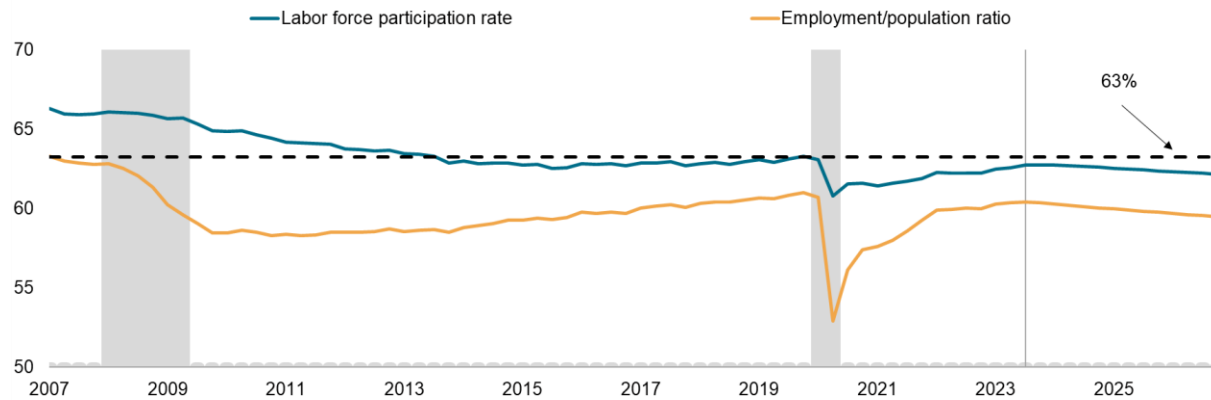
Going forward, national population would decline if it were not for international migration into the U.S. The pandemic is not seen as the cause of slower population growth. Rather, the continuation of the long-term trend of declining birth rates has become clearer since the completion of the 2018 forecast. Panelists did not indicate any disagreement with these overarching trends and their implications for regional population growth.

National Employment

Employment growth depends on population growth and labor force participation among that population. Having presented national data on slowing population growth, staff presented information on labor force participation and employment-to-population ratios.

Labor force participation

Percent



Data compiled Jan. 19, 2024.
Sources: Bureau of Labor Statistics, S&P Global Market Intelligence.
© 2024 S&P Global.

Figure 2: U.S. labor force participation

The national employment forecast shows slowing growth rates in coming decades. IHS Markit's national employment forecast indicates an average of 0.4 percent growth per year through the year 2055. This matches the national forecast for 0.4 percent population growth.

US Payroll Employment

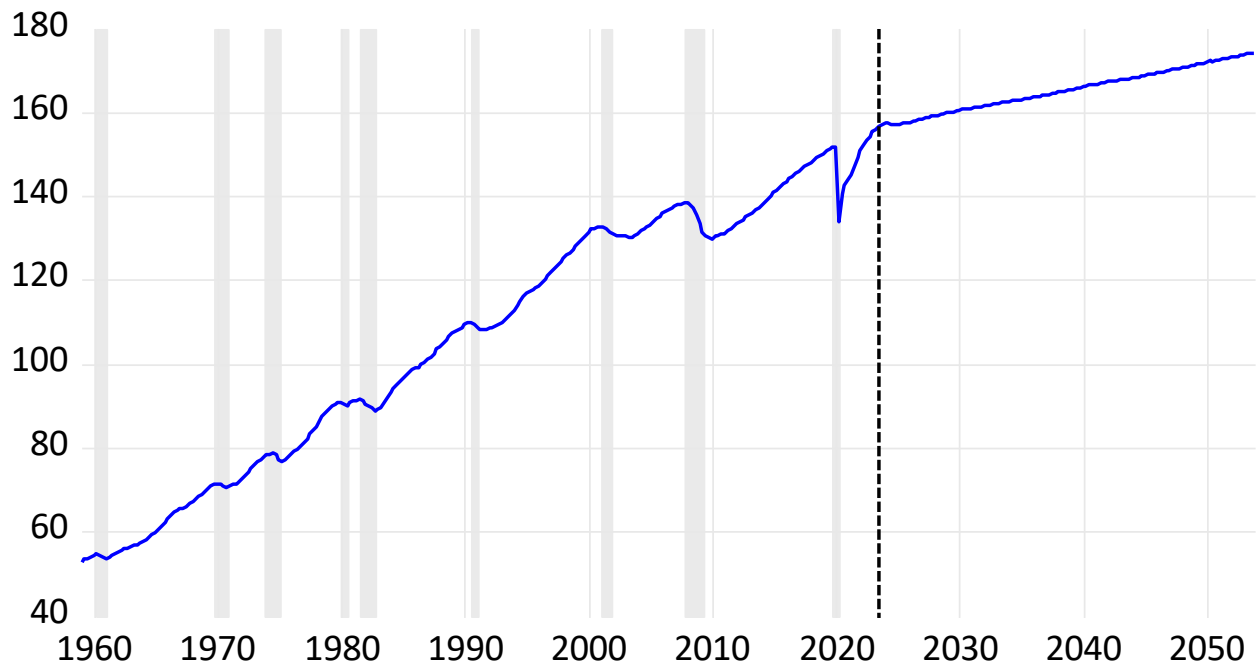


Figure 3: U.S. employment in millions (source: IHS Global Insight)

Regional population

Switching from the national context to the seven-county Portland/Vancouver Metropolitan Statistical Area (MSA), Metro staff presented the current population pyramid for the region.

Current age distribution

Figure 4 depicts an aging population with constricted younger age cohorts. This type of population pyramid indicates that a population will have diminishing natural increase (in which deaths exceed live births) and would shrink over coming decades were it not for net increases from migration.

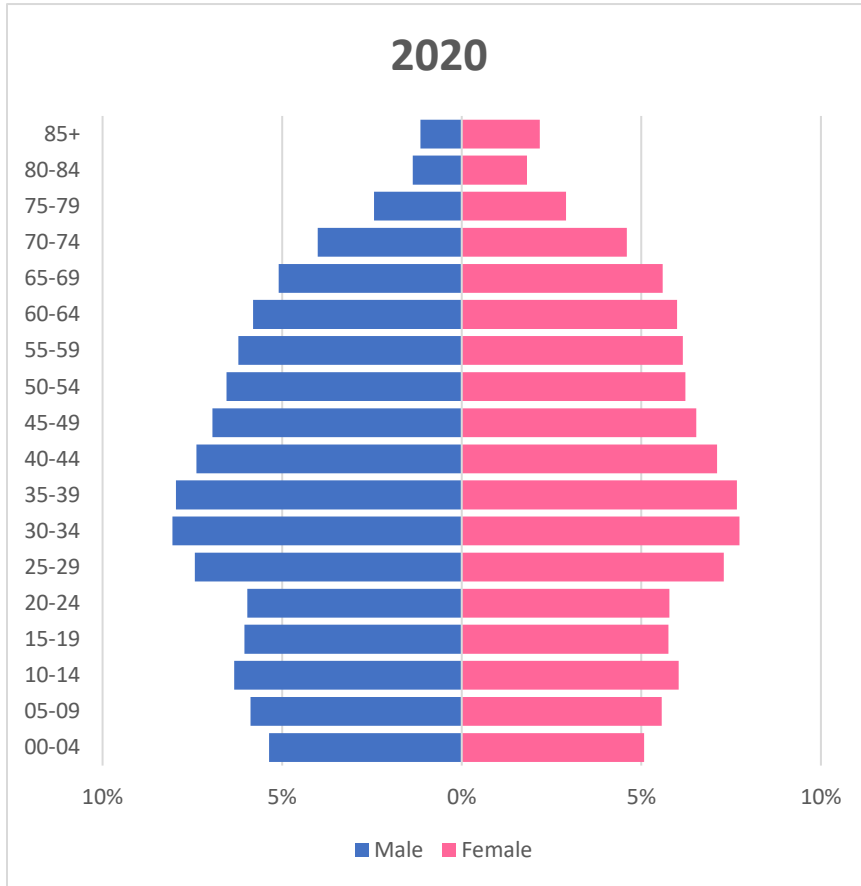


Figure 4: Portland/Vancouver MSA population pyramid in 2020 (source U.S. Census)

Panel members discussed how the regional population pyramid compares with other regions in the U.S.:

- Relative to other states, Oregon has a higher share of population that is 65 and older.
- The region continues to attract young working age migrants (ages 20-39).

Regional birth rates and fertility rates

Metro staff presented data on age-specific birth rates for the region. As depicted in Figure 5, births are being delayed until later in life and the average woman is having fewer children than in previous decades.

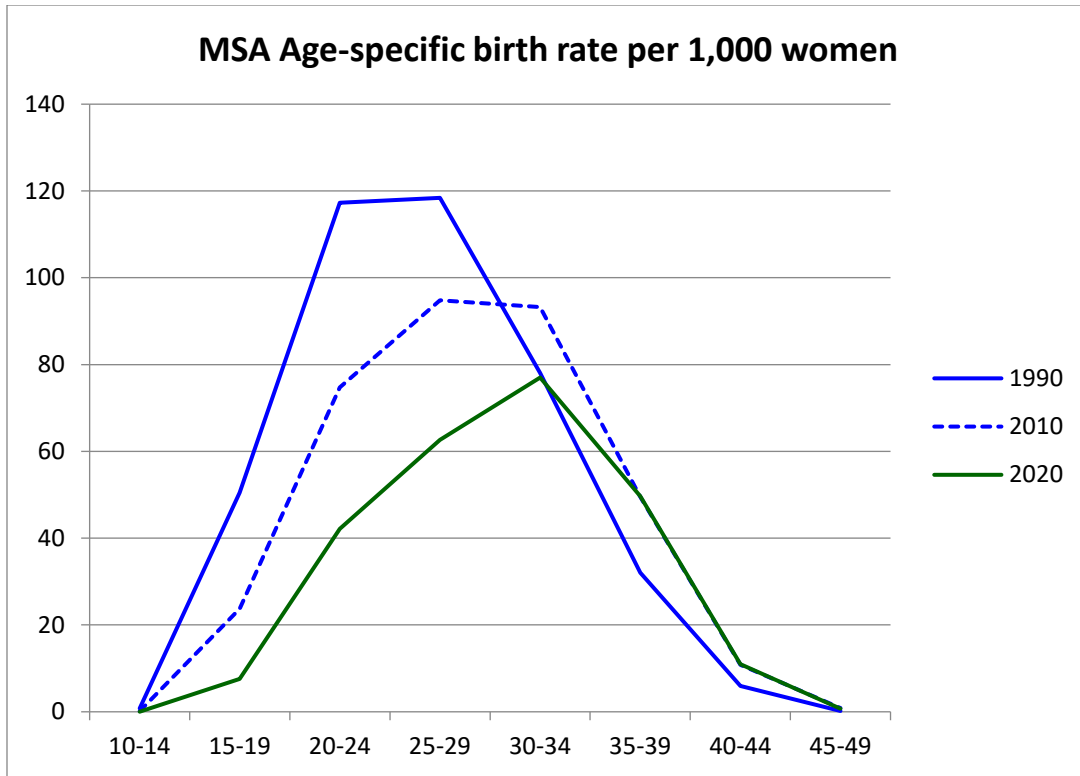


Figure 5: age-specific birth rates for the Portland MSA (source: U.S. Census)

Metro staff also presented total fertility rates for the MSA as depicted in Figure 6.

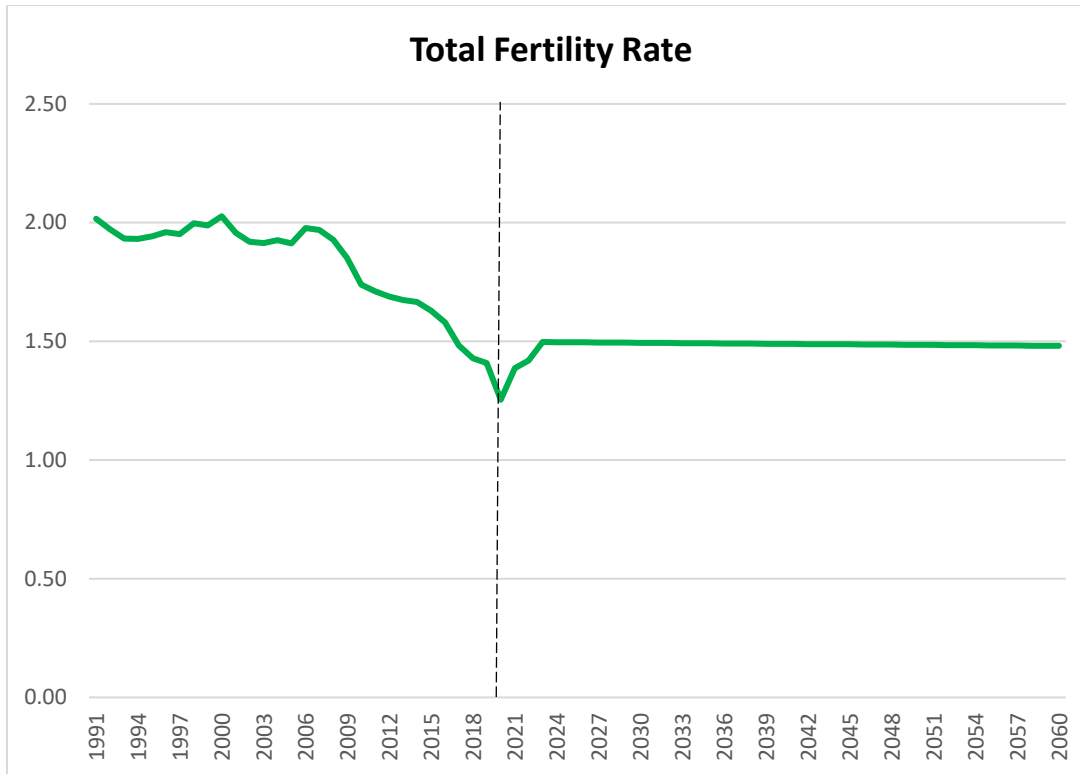


Figure 6: Portland MSA total fertility rate history and forecast (sources: PSU Population Research Center and Metro modeling)

Panelists from PSU’s Population Research Center noted that Metro’s forecast total fertility rate of 1.5 children per woman is slightly higher than PSU’s forecasts for 1.4 children per woman. Metro will retain its assumption of 1.5 for the baseline forecast but will express a low and high forecast range to account for uncertainty around this and other assumptions.

Regional mortality assumptions

Though average life expectancy is expected to rise, the sheer number of people in the Baby Boomer generation will result in rising numbers of deaths in the region in coming years (despite living longer on average). See Figure 7. The peak circa 2020 is because of the pandemic.

MSA Deaths (Baseline)

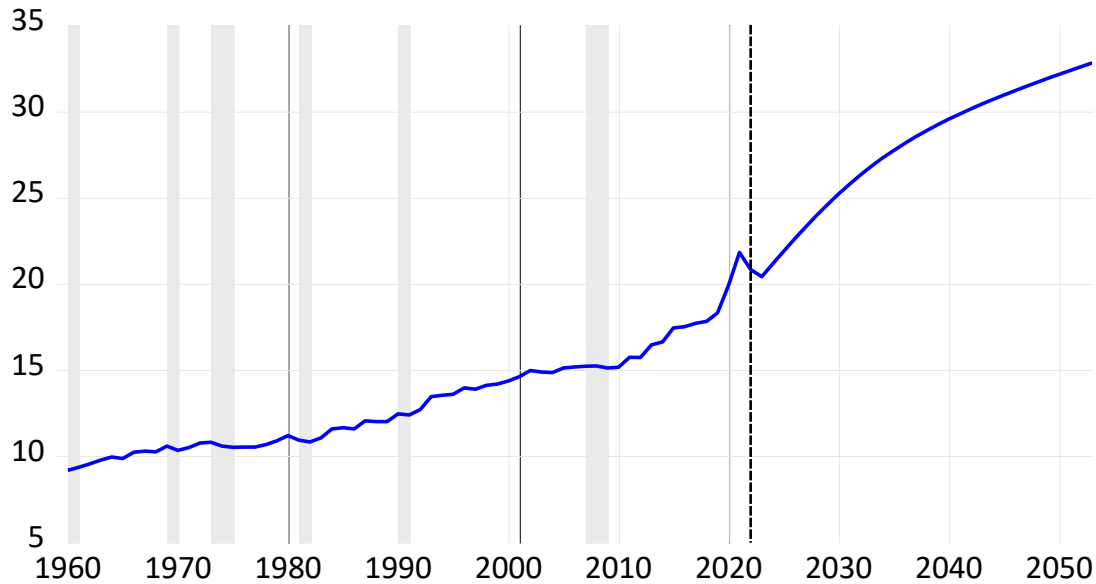


Figure 7: Annual deaths (in 1000s) for Portland MSA (Source: PSU Population Research Center)

Panel members asked whether Metro accounts for the age of people migrating in and out of the region. Metro staff indicated “yes,” that these data come from PSU and include the age of migrants.

Panelists asserted that migrants to the region tend to have better health than people born in the region and inquired whether different life expectancies are assumed for those born here vs. those that migrate here. Metro staff indicated that its forecast does not differentiate.

Panelists inquired whether the forecast includes mortality by race and ethnicity. Metro staff indicated that yes, this is calculated in a post-processor.

Natural change

Natural change is the net change in total population after accounting for births and deaths. As depicted in Figure 8, natural change in the region will be negative in about a decade when deaths outnumber births. The expert panel did not indicate any disagreement with these fundamental demographic trends. Negative natural change will leave net migration as the potential source of regional population growth.

MSA Natural Change (births minus deaths)

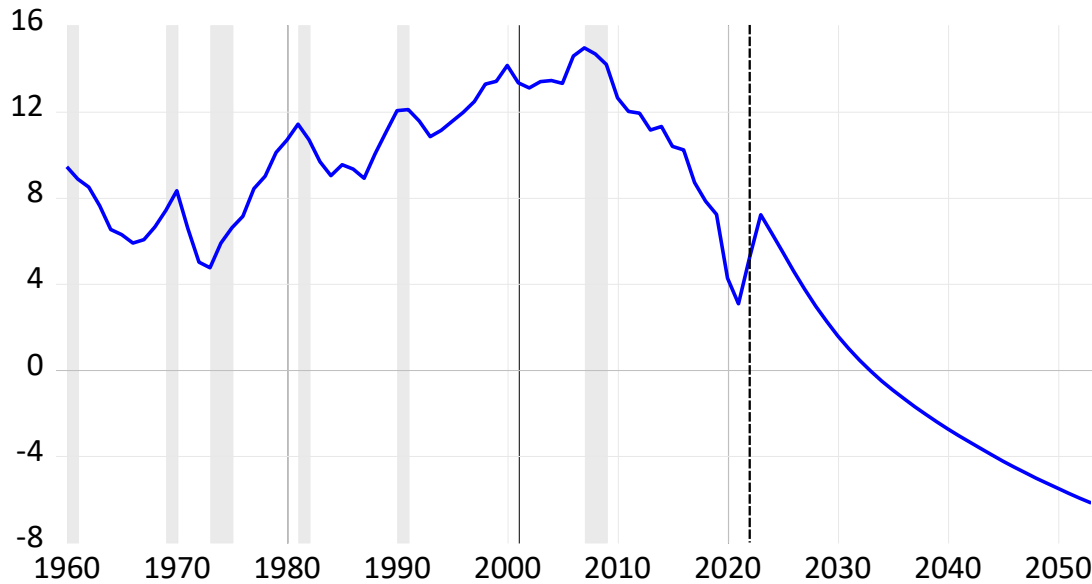


Figure 8: Natural change in the Portland MSA, 1000s of people per year (source: PSU Population Research Center)

Regional migration

Panelists discussed how migration into and out of the region is volatile and difficult to forecast. See Figure 9.

MSA Net Migration (Baseline)

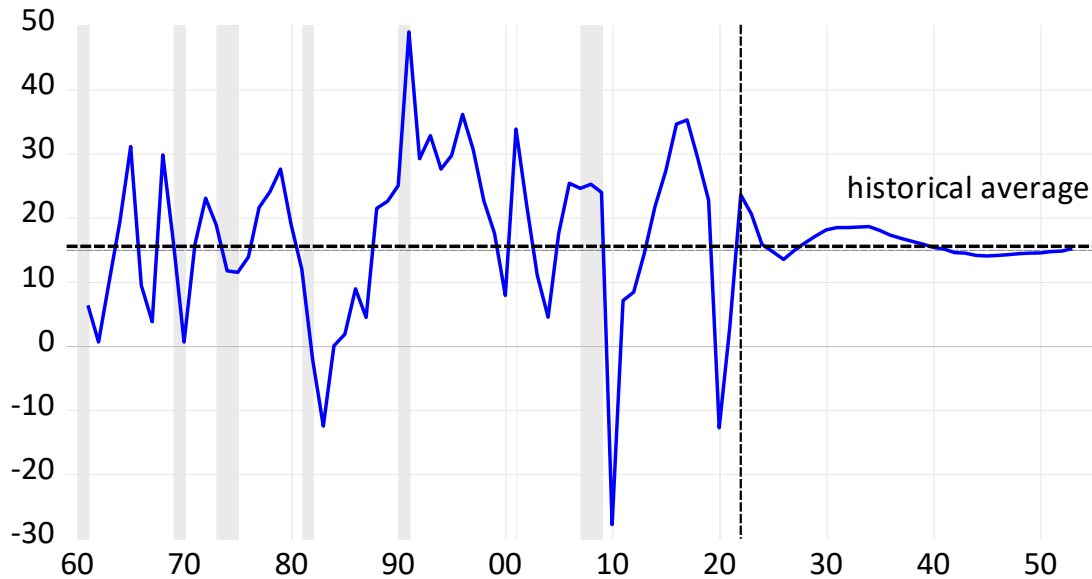


Figure 9: Portland MS net migration, 1000s per year (source: PSU Population Research Center)

Migration rates will determine regional population growth outcomes since natural increase will not be a long-term source of population growth. Panelists indicated that the persistence of remote work, quality

of life concerns in downtowns, and cost of living on the West Coast potentially reduce the relative attractiveness of the region for migration, making it more challenging to forecast than before. Panelists indicated general agreement that using the long-term historic average of about 15,000 net migrants per year into the region seemed reasonable, but that staff should be clear about the uncertainty surrounding that assumption. The State of Oregon Office of Economic Analysis has recently published an analysis of a [zero-migration scenario](#) to assess the potential impacts of diminished net migration.

Staff indicated that this uncertainty is a reason why we utilize a range forecast. The preliminary, pre-peer-review range forecast is depicted in Figure 10. Negative net migration – as factored into the low forecast – would lead to regional population losses. The baseline forecast assumes a continuation of the historic average of net regional migration. The high forecast assumes increased net migration compared to historic averages (in addition to natural increase in population).

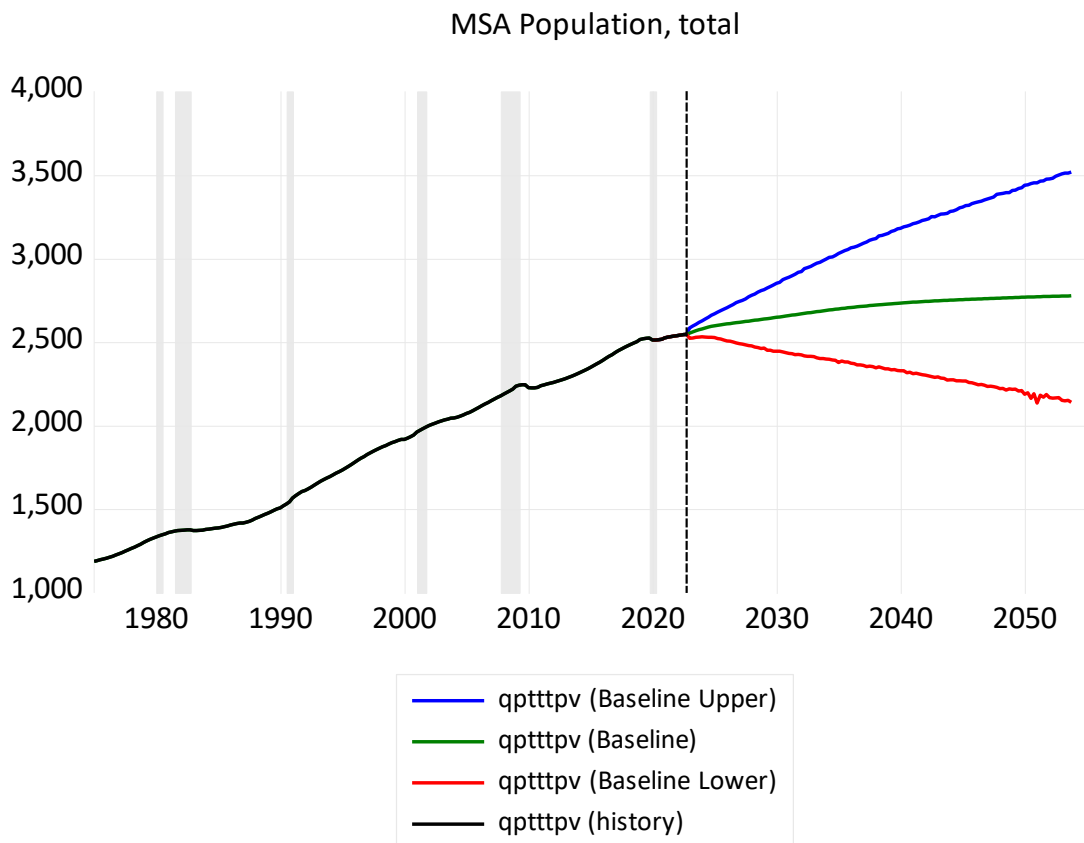


Figure 10: Portland MSA preliminary range forecast for population (in 1000s)

Housing prices and migration

Some have posited that relatively high housing costs on the west coast are one reason why migration to the region may slow down. Metro staff asked panelists a question that has been posed to them in other venues: could migration into the region be maintained by increasing housing production. The reasoning is that an increase in housing supply could moderate price increases, thereby inducing migration.

Staff's sense is that, while increased housing production should remain a goal for the nation, state, and region, it appears unlikely that it could be achieved at a scale that would give our region an affordability advantage relative to other regions. The scale of housing production needed to give our region that

advantage would likely require that builders in the region build in a speculative fashion, beyond the point of profitability.

Panelists indicated that, under this theoretical construct of intense housing production, the type of housing that gets built would matter. Specifically, homes with more bedrooms would be needed to attract households with children to bolster population growth. Housing with this many bedrooms can be built as multifamily housing or middle housing, but in our region, it has more typically taken the form of single-family housing.

Related, household formation can happen even without population growth. For instance, a person who once lived with roommates may form their own one-person household. One and two-bedroom units accommodate those newly formed small households.

Climate-induced migration

Staff introduced the topic of climate-induced migration, noting that many believe that our region’s temperate climate could attract migrants leaving unfavorable environmental conditions elsewhere (e.g., extreme heat, sea level rise, increased storm intensity). Panelists indicated that this may be true, but that there is no data trend to indicate that this has happened yet. Panelists cited a recent consumer preference survey in which just two percent of respondents indicated that climate change influenced their decision to move. The panel does not recommend explicitly factoring it into the population forecast at this time. This recommendation is consistent with a [2016 symposium on the topic](#).

Staff suggested that households may become more sensitive to climate risk if insurance companies raise rates for property owners in more vulnerable regions. Staff intends to continue monitoring this issue in future regional forecasts. Countervailing considerations include recent extreme heat in the Pacific Northwest and the increased prevalence of wildfire smoke.

Regional employment

Staff presented information about employment recovery from the 2020 pandemic recession. As shown in Figure 11, non-manufacturing employment in the region has fully recovered, but manufacturing employment has not (see Figure 12).

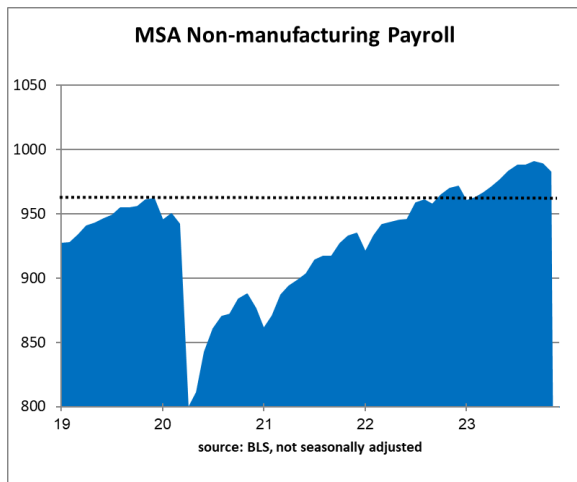


Figure 11: non-manufacturing employment in 1000s of jobs in the Portland MSA, 2019-2024 (source: Bureau of Labor Statistics)

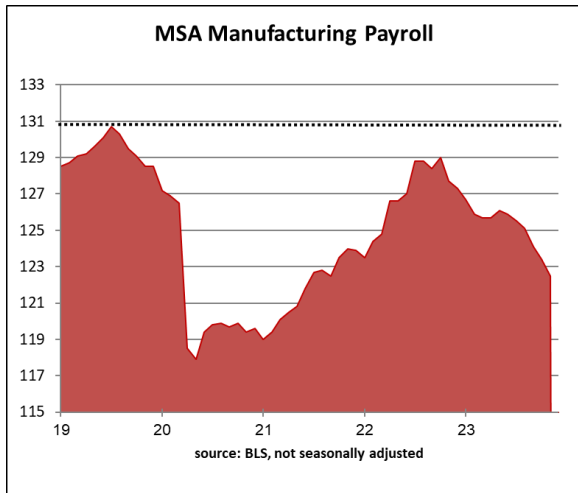


Figure 12: manufacturing employment in 1000s of jobs in the Portland MSA, 2019-2024 (source: Bureau of Labor Statistics)

Moving forward from recent history, Metro staff indicated that they believe that future employment growth rates will track closely with population growth rates, with both at 0.4 percent annual average growth. Staff presented the employment range forecast for the MSA as depicted in Figure 13.

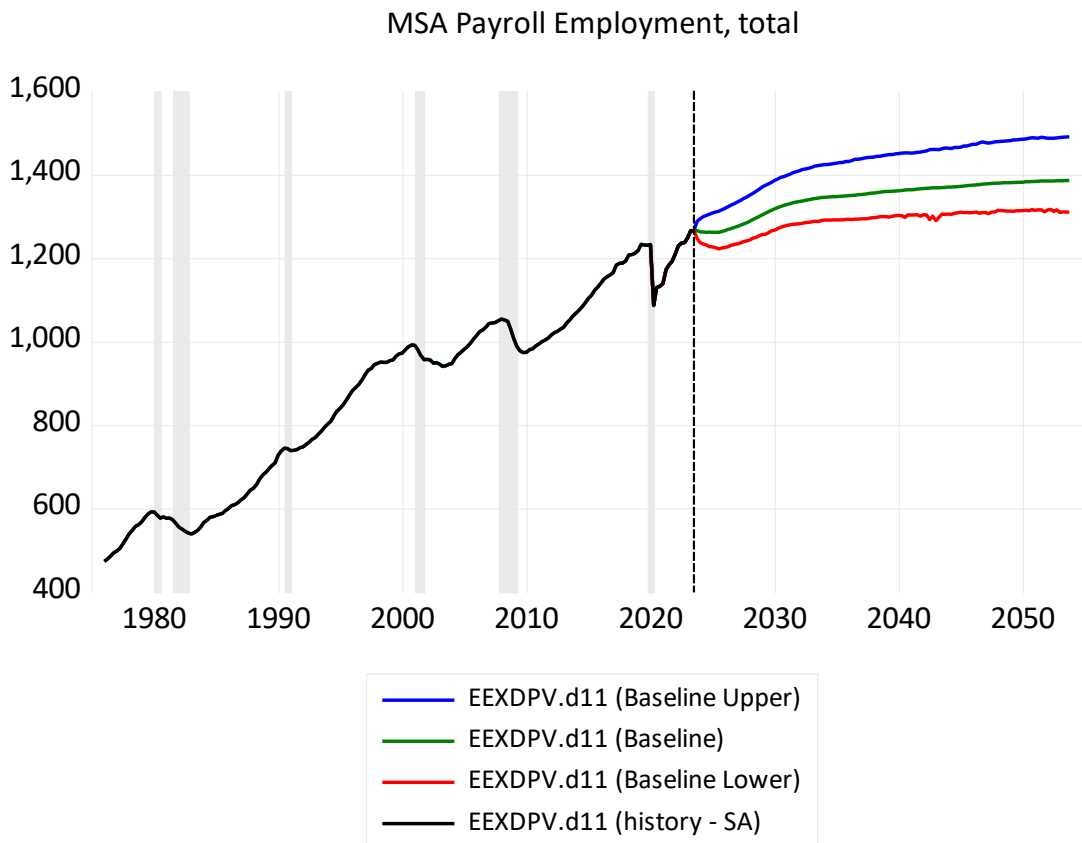


Figure 13: employment history and range forecast for the Portland MSA in 1000s of jobs

Panelists felt that Metro’s preliminary employment forecast looked right in total, but that it was too optimistic about manufacturing employment (see Figure 14) and the employment impacts of the CHIPS

Act on computer and electronics manufacturing and fabrication of metal sectors as depicted in Figure 15 and Figure 16.

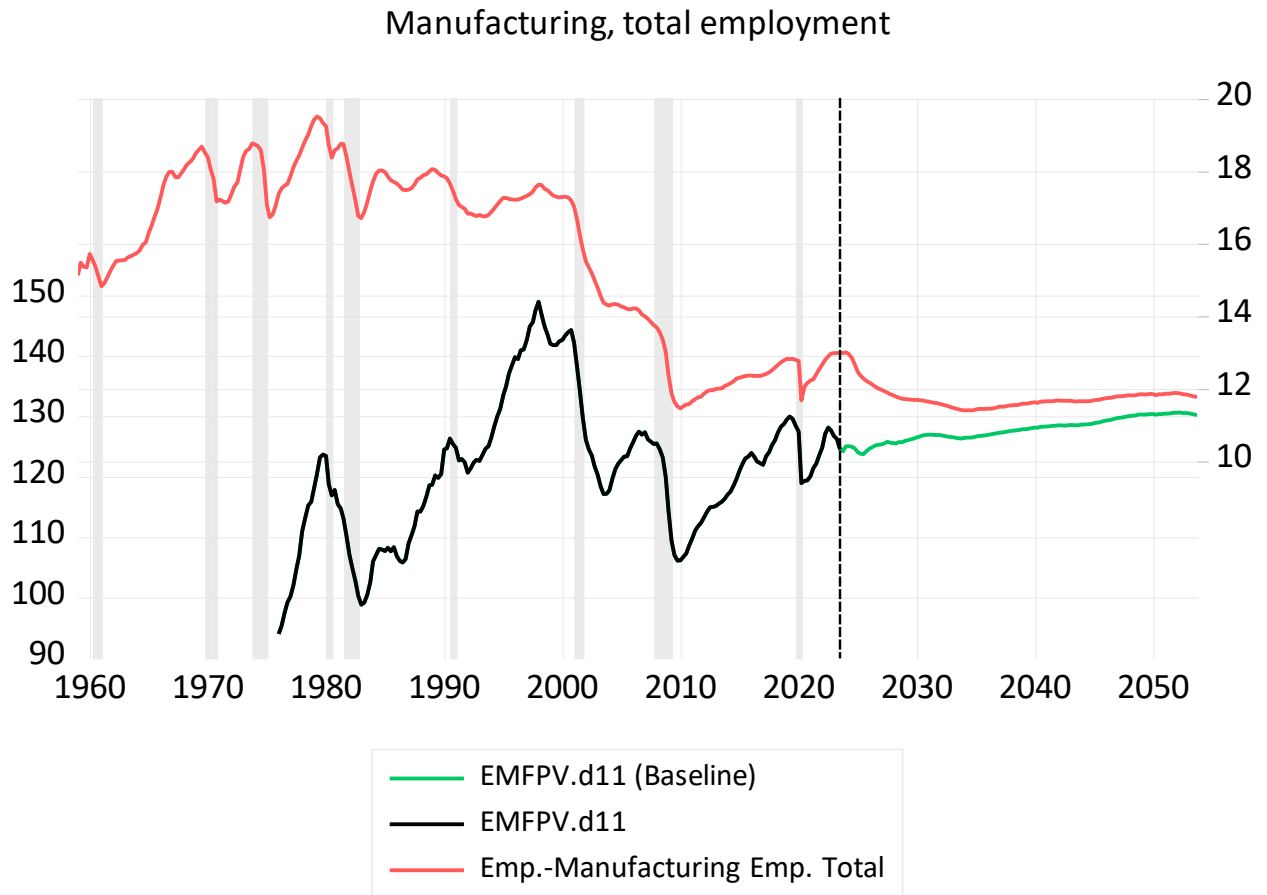


Figure 14: manufacturing employment history and forecast in 1000s of jobs for the Portland MSA (black and green lines) and the U.S. (red line)

Computer & Electronics employment

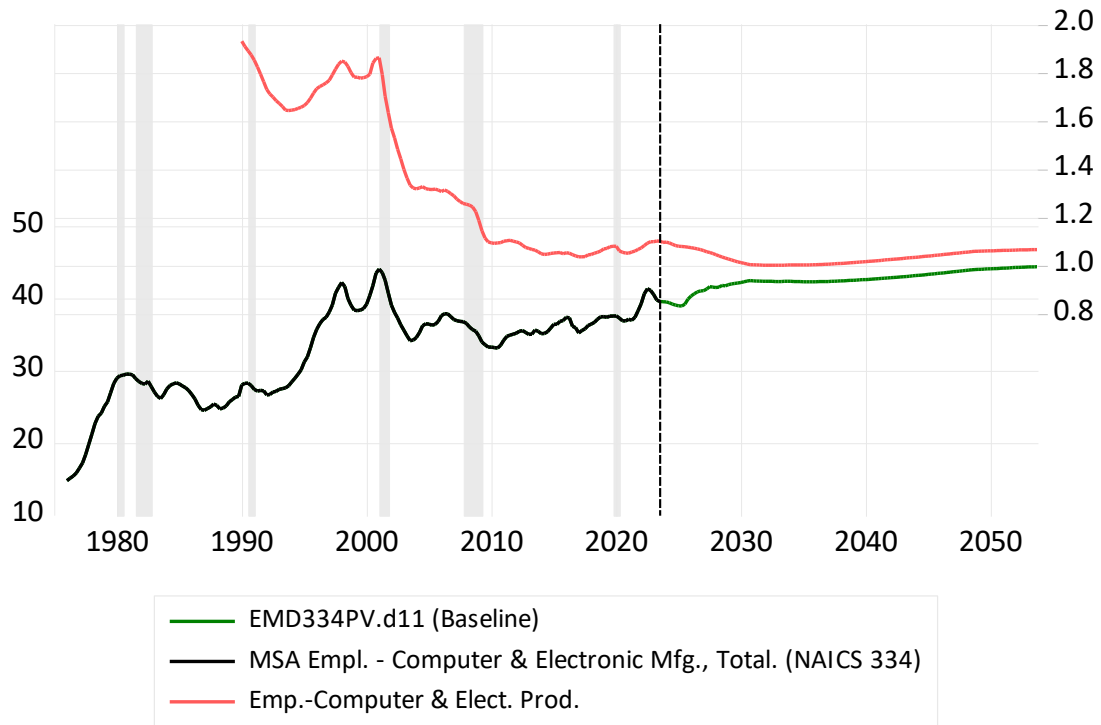


Figure 15: computer and electronics employment; red is U.S.; black is MSA history; green is MSA baseline forecast (in 1000s of jobs)

Fabricated Metals employment

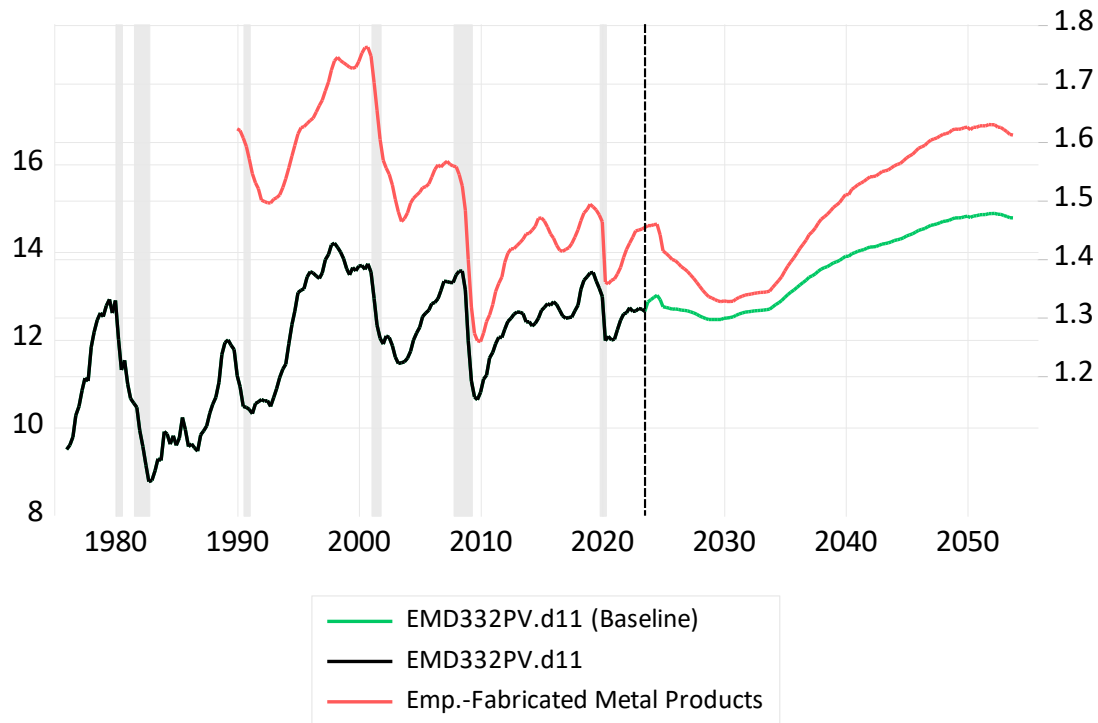


Figure 16: fabricated metals employment; red is U.S.; black is MSA history; green is MSA baseline forecast (in 1000s of jobs)

Panelists noted that Metro “would have to be really confident in the CHIPS Act” to forecast growth as shown in Figure 15 and Figure 16 and that “manufacturing does not seem like the most likely sector for employment growth.” Panelists indicated that Metro’s forecast for manufacturing carried “too much long-term momentum from the one-time shock of the CHIPS Act” and that, while there may be a short-term bump in high-tech manufacturing, it will be relatively small in the context of overall employment. In summary, panelists indicated that the CHIPS Act is best thought of as preventing manufacturing job losses that would likely otherwise occur over the next decade. Panelists further noted that the statewide forecast show a decline in metal fabrication.

Longer term (past 10 years), panelists believe there is too much uncertainty around technological changes, automation, and productivity to be confident in sustained high-tech manufacturing employment growth when the historic trend would indicate otherwise.¹

In response, Metro staff will adjust the computer and electronics and metal fabrication sector forecasts downward slightly. The result is that computer and electronics manufacturing employment—after an initial increase—will be at roughly year 2022 levels by the end of the forecast period in 2044. Metal fabrication will be at roughly pre-pandemic levels by 2044.

Panelists inquired whether the first ten years or the end point (year 2044) that matters for the growth management decision. Staff indicated that the land need analysis looks at the 20-year timeframe that

¹ As depicted in Figure 14, today in the Portland MSA, there are about 85 percent the number of manufacturing jobs that there were in 1998.

begins in 2024 and ends in 2044. Panelists reiterated their view that the longer-term outlook for manufacturing employment is flat at best.

Regarding other employment sectors depicted in Figure 17, panelists discussed the following, but did not indicate any disagreement:

- The high growth rate depicted in the natural resources (mining and logging) sector is because of its small size (i.e., small increases in absolute numbers result in big growth rates).
- The computer and electronic manufacturing sector is expected to grow slower (flat growth) than in the past.
- There will be a notable decline in the transportation and warehousing sector (U.S. and Portland MSA) after a decade of steep growth.
- Drivers for state and local government sector growth:
 - Slowing population growth will really impact this sector
 - However, positive tax collections and budget can drive this sector forward too
- Range forecast – in the past, the Metro Council has adopted the baseline (most likely) forecast.

| <u>Industry Name by NAICS</u> | APR%: | History | ST | LT |
|---|-------|------------------|----------------|----------------|
| | | <u>1976-2022</u> | <u>2022-32</u> | <u>2022-45</u> |
| Total Nonfarm Payroll | | 2.1% | 0.9% | 0.5% |
| Manufacturing, total | | 0.6% | 0.0% | 0.1% |
| Durable MF, total | | 0.7% | 0.0% | 0.1% |
| Lumber products | | -1.9% | -1.3% | -1.1% |
| Primary metals | | -0.1% | -0.6% | -0.7% |
| Fabricated metals | | 0.6% | 0.0% | 0.6% |
| Machinery | | 0.4% | -1.5% | -0.6% |
| Computer & Electronics | | 2.1% | 0.4% | 0.3% |
| Transportation Equipment | | -0.4% | -1.9% | -1.5% |
| Other Durable MF | | 0.8% | 0.9% | 0.5% |
| Non-durable MF, total | | 0.2% | 0.0% | 0.0% |
| Food processing | | 1.0% | 0.0% | 0.0% |
| Paper products | | -2.1% | -1.5% | -1.4% |
| Other Non-durable MF | | 0.3% | 0.1% | 0.3% |
| Private Non-manufacturing, total | | 2.5% | 1.0% | 0.6% |
| Natural resources | | -0.9% | 4.8% | 1.7% |
| Construction | | 2.9% | 2.4% | 1.2% |
| Wholesale trade | | 1.4% | 0.5% | 0.3% |
| Retail trade | | 1.5% | 0.5% | 0.6% |
| Transportation, Warehousing & Utilities | | 2.1% | -1.1% | -1.4% |
| Info - Publishing | | 3.5% | 1.6% | 0.0% |
| Info - Internet | | 0.8% | 1.2% | 0.4% |
| Finance & Insurance | | 1.5% | 1.3% | 1.1% |
| Real Estate | | 2.6% | 0.4% | -0.2% |
| Pro., Sci., Tech. services | | 3.9% | 0.6% | 0.5% |
| Mgmt. of Companies | | 4.2% | 0.8% | 0.3% |
| Admin. & Waste Mgmt. Services | | 3.5% | 1.4% | 1.2% |
| Education | | 3.6% | 1.2% | -0.1% |
| Health care | | 3.3% | 1.4% | 0.9% |
| Leisure | | 2.3% | 3.1% | 2.0% |
| Hospitality | | 2.5% | 0.9% | 0.3% |
| Other services | | 2.3% | 1.5% | 1.0% |
| Government, total | | 1.4% | 1.0% | 0.3% |
| Federal gov. | | 0.3% | 0.4% | 0.2% |
| State & Local gov. | | 1.5% | 1.1% | 0.4% |

Figure 17: Employment growth rates by sector in the Portland MSA, history and forecast

Work from home and office vacancies

Staff presented a comparison of work from home trends in several metropolitan areas (Figure 18). Staff noted that this topic was somewhat outside of the regional forecast review scope, but that our growth management assessment will need to account for changes in demand for commercial office space. Panelists correctly noted that survey respondents may in fact be working in the office some days but reported that they primarily work remotely. Panelists also noted that work from home shares may

decrease somewhat if the labor market loosens (i.e., employers have more bargaining power over working conditions). Staff will strive to account for these considerations as they estimate commercial office demand.

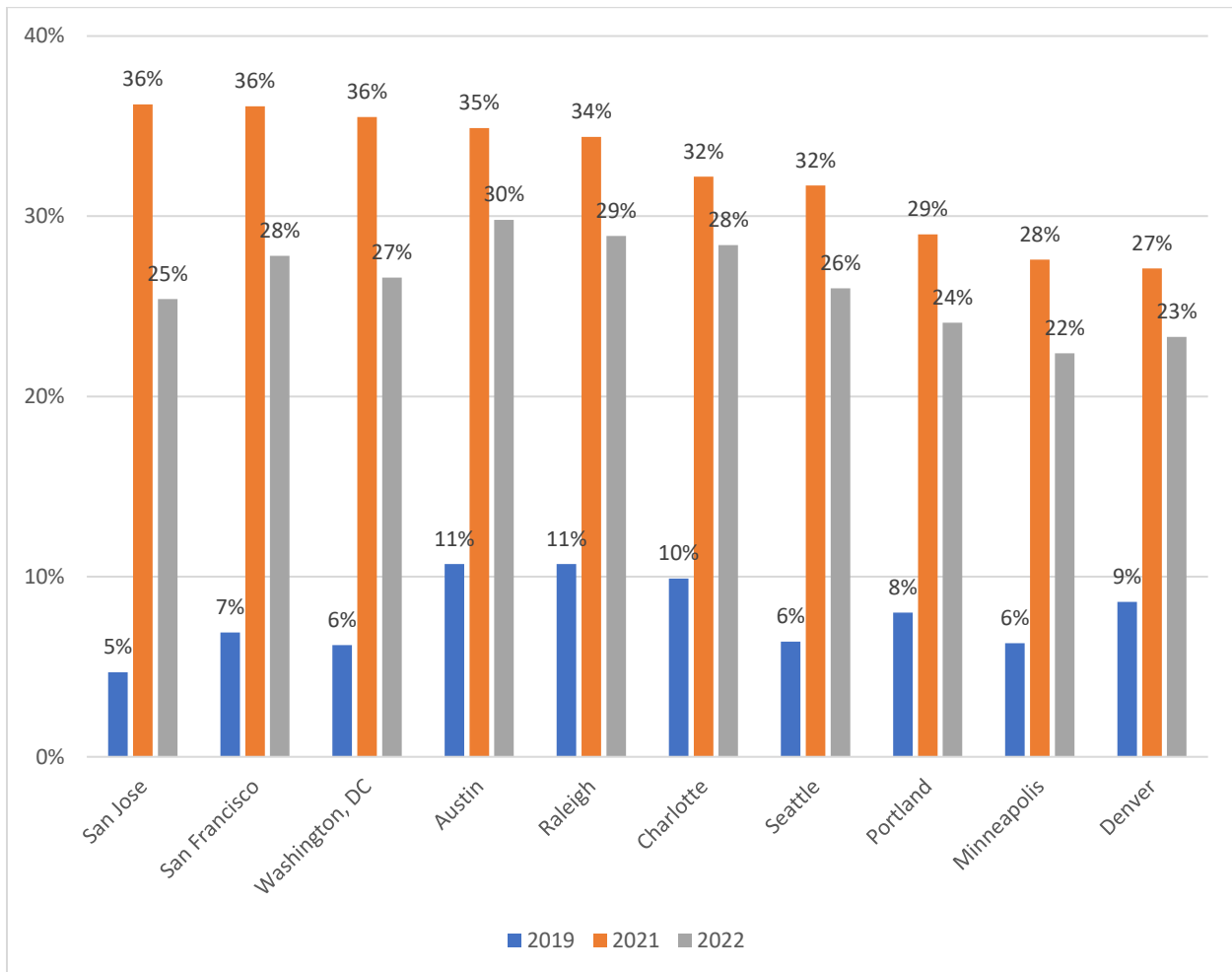


Figure 18: comparison of shares of all workers in different MSAs reporting that they primarily work from home (source ACS)

Office vacancies

As with work from home trends, staff introduced the topic of office vacancies as potentially being outside of the panels' area of expertise. However, staff is interested in whether we need to consider office vacancies as a source of growth capacity (we have not in the past, instead focusing on vacant land or redevelopment of existing structures). Metro staff believes that vacancies will reset in the next couple years or so and will likely not be a long-term capacity consideration.

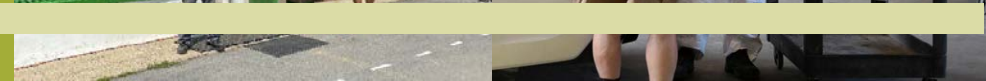
Materials following this page were distributed at the meeting.



Metro

Garbage & Recycling System Facilities Plan

Metro Policy Advisory Committee
Phase 3 Scenarios Overview
February 28, 2024



Waste Prevention and Environmental Services

Our primary responsibility is to conserve resources through waste reduction and manage garbage and recycling safely for people and the environment.

Garbage and recycling operations



Services and community investment

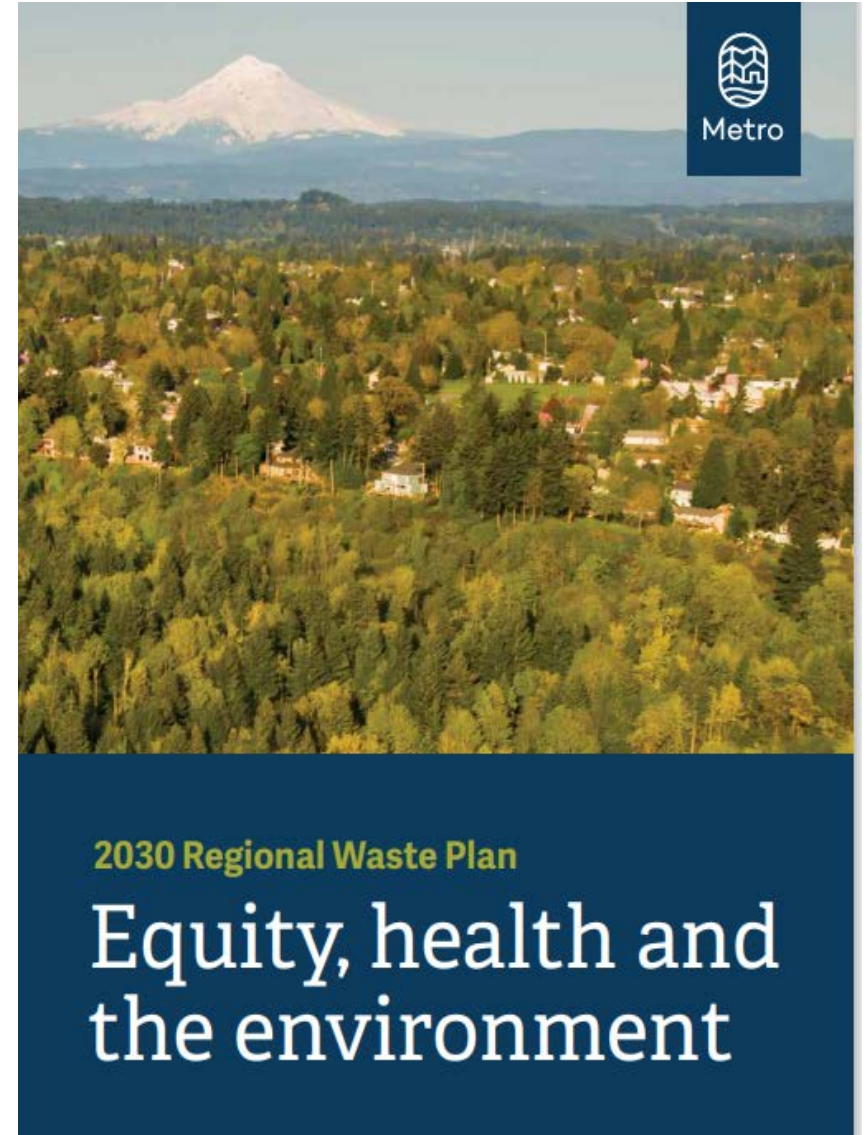


Planning and partnerships

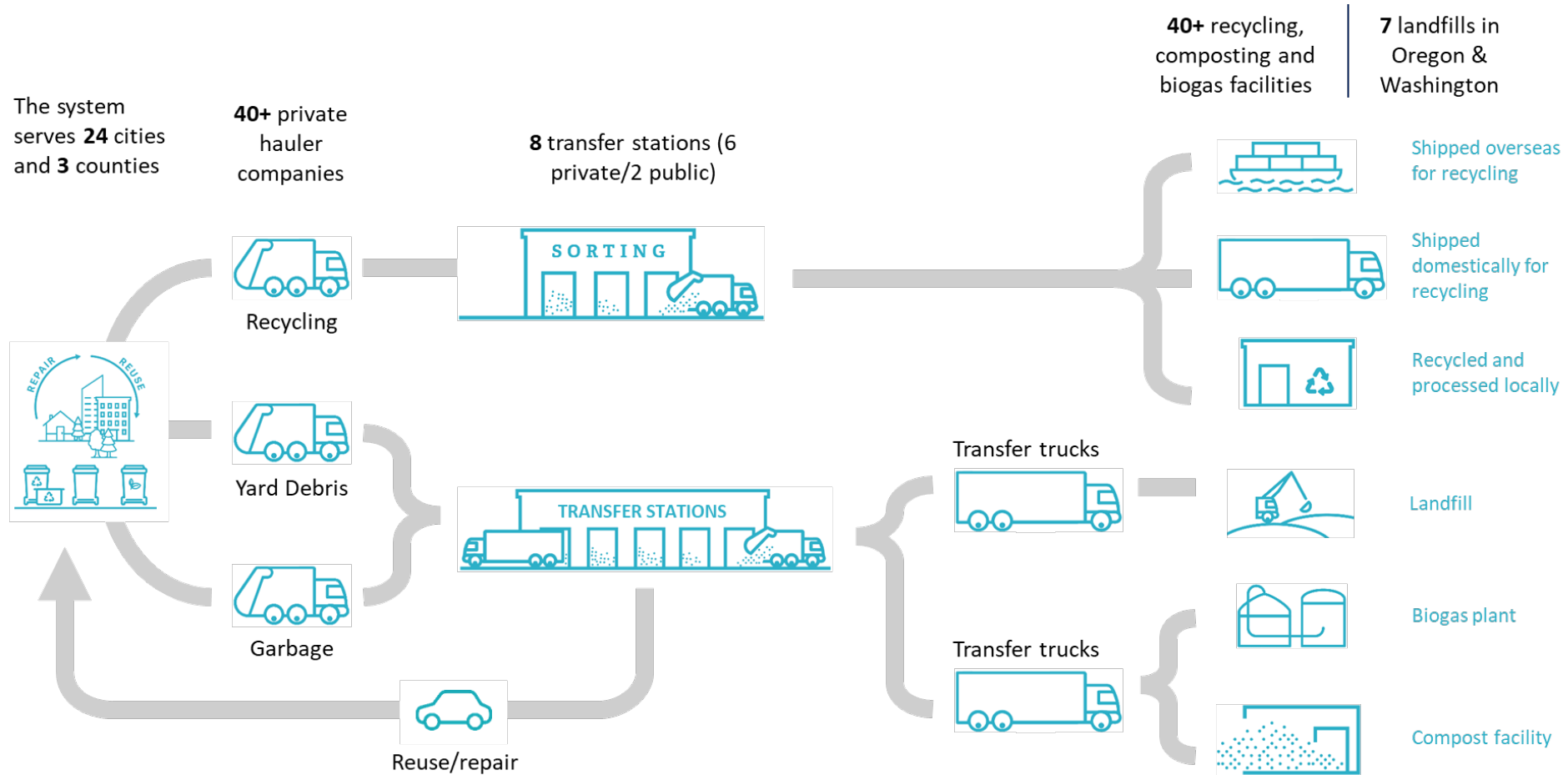


Metro

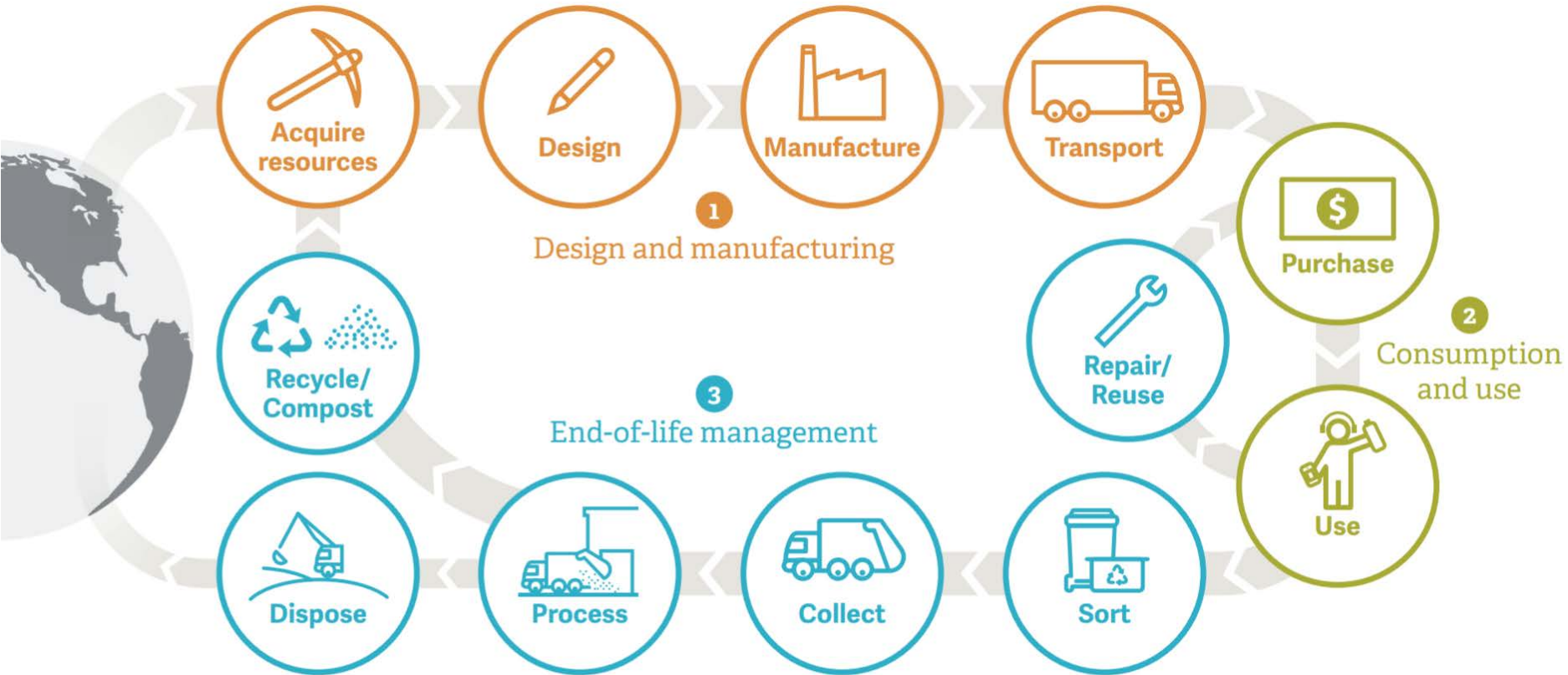
Regional Waste Plan outcomes



The garbage and recycling system



Addressing the full life of products



Reduction of harmful impacts by intervening earlier.



Metro

Metro | 2030 Regional Waste Plan

Presentation Overview

Phase 3 update:

– **What we did**

- Engagement recap

– **What we learned**

- Key takeaways

– **What's next**

- Choosing a preferred set of investments



Project timeline

1. Identify values & outcomes

Informed by the 2030
Regional Waste Plan

1

2

2. Conduct a gap analysis

Identify current and
future facility needs
and evaluation criteria

3

3. Develop a preferred scenario

Discuss and choose a set
of investments to address
the gaps

4

4. Create an implementation strategy

Sets a path for
implementing the selected
investments

5

5. Draft final plan

Set of investments
implementing the
values and outcomes





The Metro South facility opens in April 1983

Values & outcomes



Healthy people and environment



Resource conservation



Environmental literacy



Economic well-being



Excellent service; equitable system access



Operational resilience



Community restoration



Community partnerships



Community investment



Tribal consultation

System gaps



Gaps for residential and small business customers



Gaps for commercial customers



DO NOT PUT IN GARBAGE. Ask for assistance.
NO ARROJAR A LA BASURA. Pida asistencia.




E-WASTE


ELECTRIC WIRE


MOTOR OIL/
ANTI-FREEZE


CLEAN COPPER


CLEAN PLASTIC
CONTAINERS


ALUMINUM

oregon
E CYCLES

PLEASE
RECYCLE
ALL OTHERS AS
WASTE IN THE
WASTE BIN



Metro Central recycling depot

Phase 3: What we did

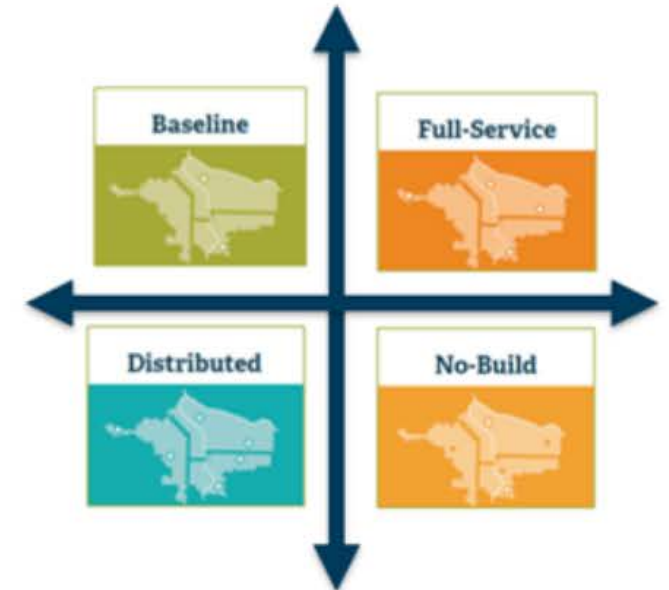
Targeted Engagement



Policy Tools



Draft Scenarios



Phase 3: What we did

1

Building Scenarios

- Reuse/repair workshop
- Solid Waste Directors
- Education and outreach staff
- Industry interviews
- International panel at Council
- Committee feedback

2

Symposium

Over 120 participants, including representatives from:

- Community
- Local government
- Reuse/repair
- Industry

3

Follow Up

- Metropolitan Mayors' Consortium
- Local government workshops
- Waste Prevention and Environmental Services staff
- Unite & Adelante Mujeres workshops
- Confederated Tribes of Siletz Indians Portland Area Office workshop





Conversations with stakeholders



Scenario 3 ①

- Like that it has the opportunity for us to each do what we do best rehaul/repair > GZR (Metro)
- Hard to pick the right spot, consider equity. Grocery Store. Parking those kinds of buildings that already folks need to visit. Potentially - Efficient, purpose-built

Scenario 2

- oversight to Reg
- mandatory reclaim
- with what M
- comp st
- list
- hul
- lam

Scenario 2

- to drop off items
- to be part of p
- Metro's role in
- if folks could be
- If bike goes to
- disposal Per waivers are really im
- Funding based on tonnage diverted
- a way to simplify the process.
- Paramount to all of this is the fund
- to have us to do what we need t
- source between Co
- f. for a Contract
- ver a Compet
- nty groups
- to coop
- termin a
- by
- ass

Conversations with stakeholders



Conversations with stakeholders



Conversations with stakeholders

Reuse, Recycling and Garbage System Symposium

September 27, 2023



Symposium workshop

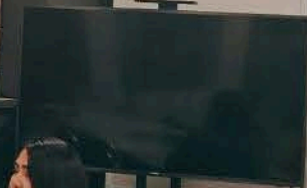


Symposium tours



Elaboración de los escenarios

| Base | Consolidado | Distribuido | No Construir |
|---|--|--|---|
|  |  |  |  |
| Metro no construye nuevas instalaciones y cubre las brechas de servicio solo mediante mejoras a las instalaciones existentes. | Metro construye cuatro estaciones de transferencia grandes y dos nuevas instalaciones para el reuso. | Metro construye una red distribuida de instalaciones de tamaño a través de los tres condados de la región. | Metro cumple los requisitos sobre el gobierno y sector privado; invierte en instalaciones privadas y hace renovaciones a sus instalaciones. |




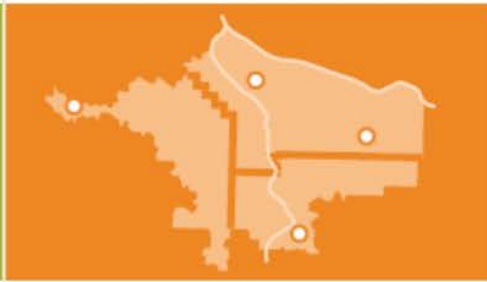


Follow up engagement



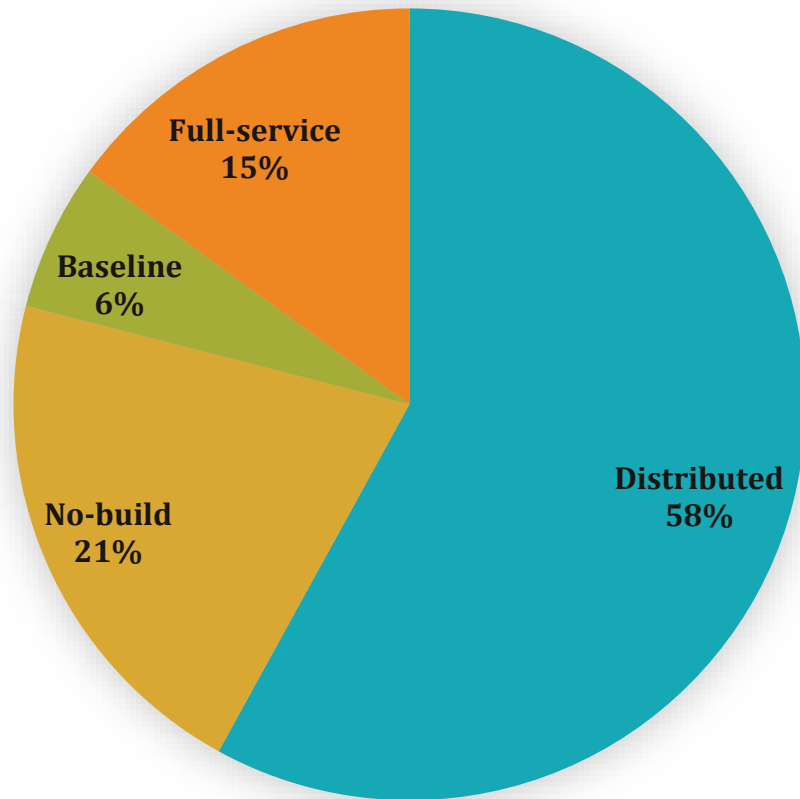
SKYLINE

Follow up engagement

Phase 3: What we heard

| Baseline | Full-Service | Distributed | No-Build |
|---|--|---|--|
|  |  |  |  |
| <p>Metro does not build new facilities or address facility gaps, but maintains current facilities</p> | <p>Metro builds four large transfer stations and two new reuse facilities</p> | <p>Metro builds a network of distributed mid-sized facilities across the three counties</p> | <p>Metro increases requirements, invests in private facilities and renovates existing facilities</p> |

Phase 3: What we heard



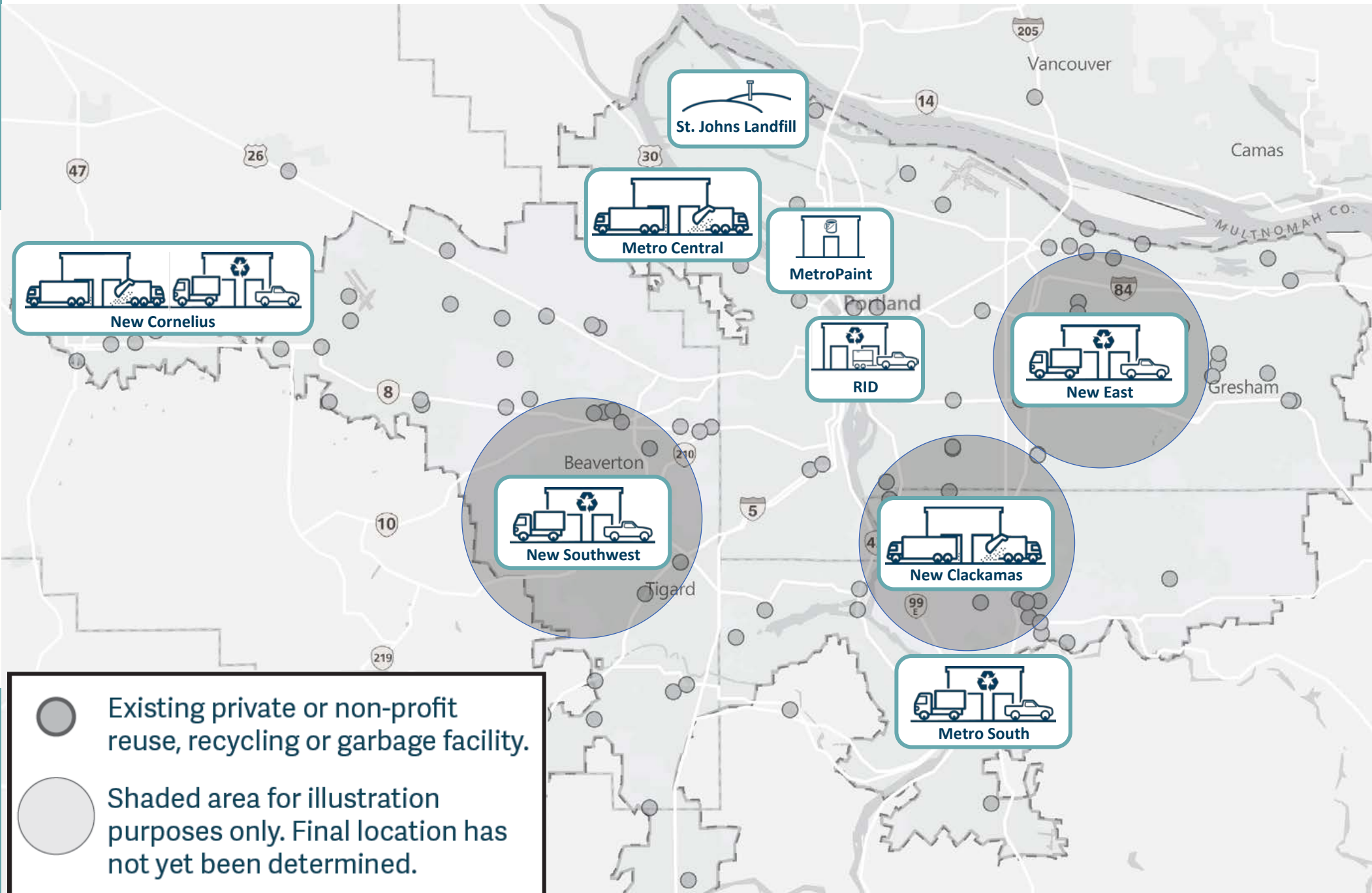
80% Would make changes to their preferred scenario



Distributed

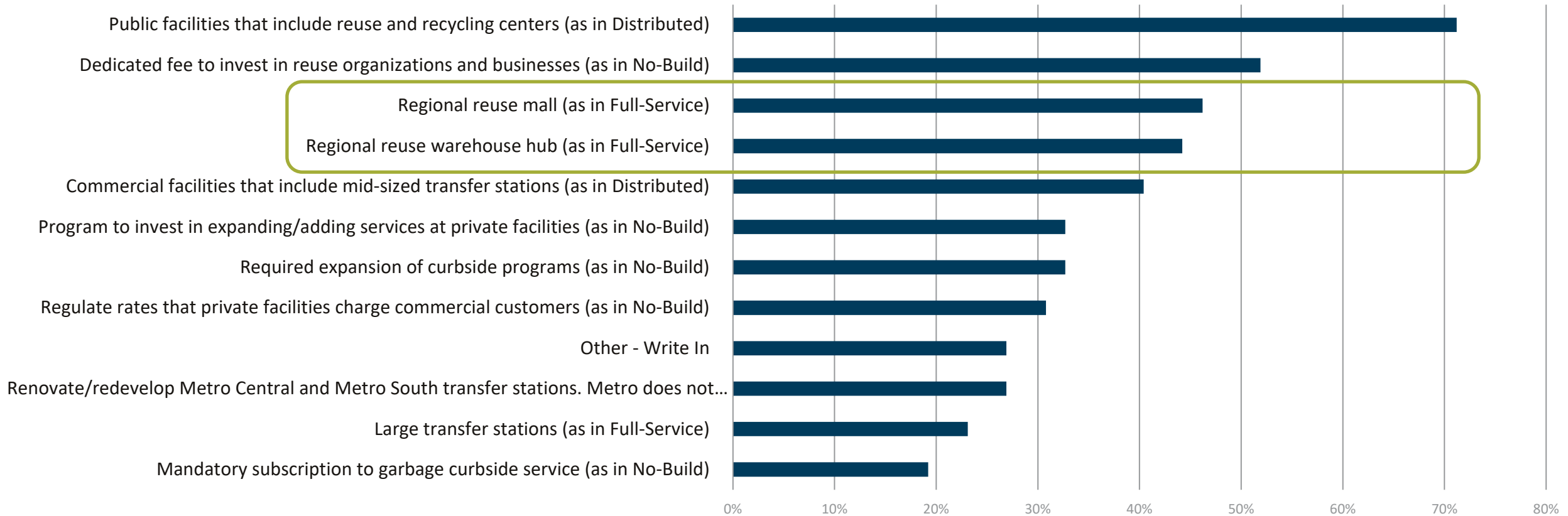


Metro builds a network of distributed mid-sized facilities across the three counties

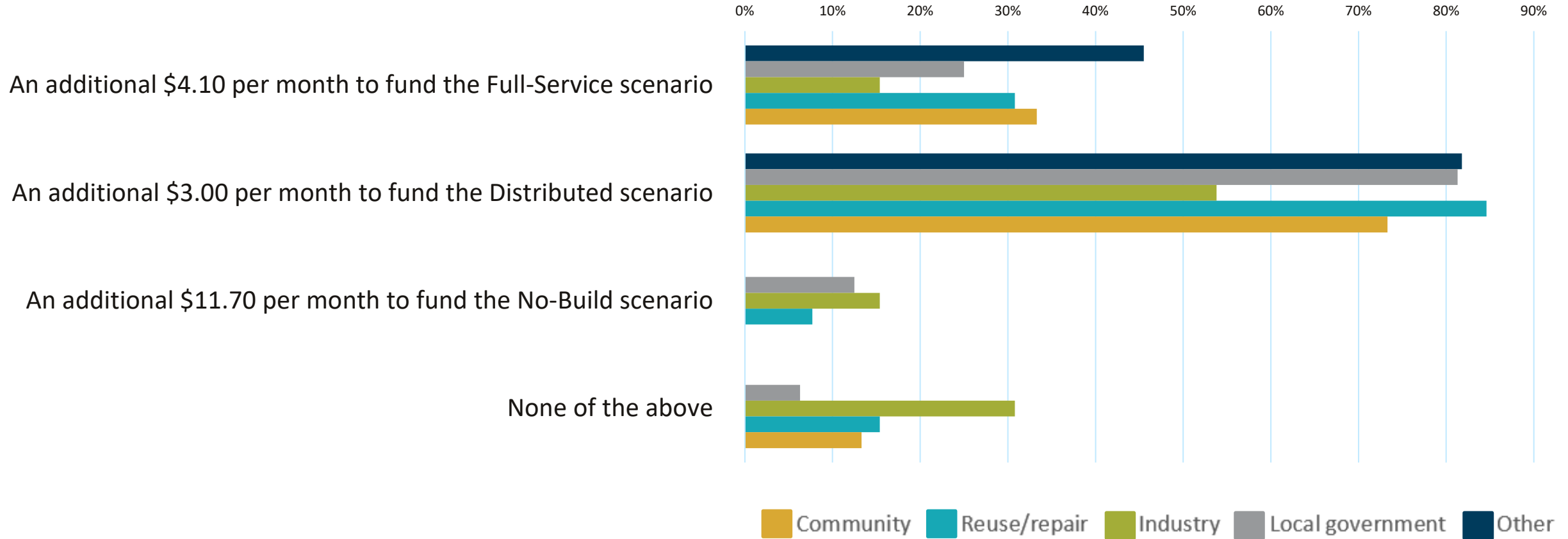


- Existing private or non-profit reuse, recycling or garbage facility.
- Shaded area for illustration purposes only. Final location has not yet been determined.

Scenario elements



Level of investment



Tribal consultation

What we heard:

- Protection of the environment, natural resources, and archeological, cultural or historic resources

Workshop

- Impacts of different types of facilities on the environment and human health, particularly for communities of color and low-income communities
- Do more to address plastic pollution, create stronger incentives for recycling and work closely with the state on implementation of the Recycling Modernization Act



What we heard: Supported elements

Facilities



Separate commercial facilities and public facilities



Public facilities, including reuse and recycling centers



New reuse mall and warehouse concept

Investment priorities

Existing public, private and nonprofit infrastructure

Improving safety and reuse at Metro Central and Metro South

Stable funding for reuse infrastructure

Invest in facilities but keep costs down.



What's next

1. Identify values & outcomes

Informed by the 2030
Regional Waste Plan

1

2. Conduct a gap analysis

Identify current and
future facility needs
and evaluation criteria

2

3. Develop a preferred scenario

Discuss and choose a set
of investments to address
the gaps

3



**Council
engagement**
Preferred
Scenario

4

4. Create an implementation strategy

Sets a path for
implementing the selected
investments

5

5. Draft final plan

Set of investments
implementing the
values and outcomes



What's Next: Preferred Scenario

- Develop options for each key area based on council preferences and stakeholder feedback
- Council discusses tradeoffs and selects preferred options
- Staff proposes draft plan elements for council consideration

Key areas

Public self-haul facilities

Commercial facilities

Reuse facilities and programs

Draft plan elements

- Facility projects, programs policies
- Estimated investment amounts
- Implementation timeline
- Financing plan



Discussion

- Do you have any questions on what we did or what we heard?
- Is there anything from the engagement report that stands out to you or aligns with what you hear from your community?
- Is there anything you want to lift-up as Council considers preferred scenario elements?



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Metro

Urban growth management update: Regional forecast

MPAC

February 28, 2024

Urban growth management - why?

- Protect farms and forests
- Focus investment in existing communities
- Encourage a greater variety of housing choices
- Reduce carbon emissions by keeping destinations close



Technical work and analysis: Developing the urban growth report

- Buildable land inventory (BLI)
- Regional forecast
- Capacity analysis
- Employment trends and site characteristics
- Housing needs analysis
- Residential readiness analyses
- Draft urban growth report (UGR)

City expansion proposals

- Letters of interest
- Expansion proposals

2040 planning and development grants available

Metro Council decision

- Consider Metro staff and advisory group recommendations
- Public hearings
- Policy direction
- Final decision



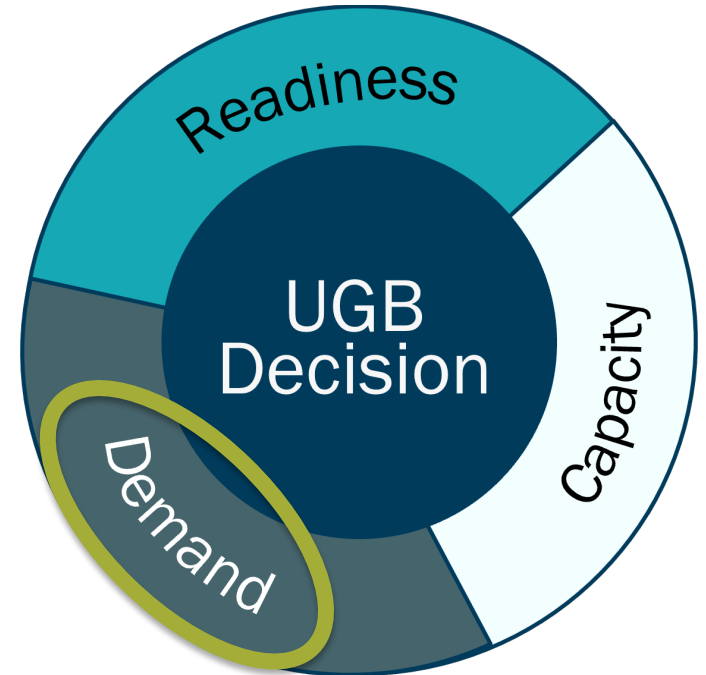
Engagement

- MTAC
- MPAC
- CORE
- Land Use Technical Advisory Group
- Jurisdictional outreach
- Urban growth report roundtable
- Youth cohort
- Interest group presentations

Project timeline

Urban growth report

How does the regional forecast fit into the urban growth report assessment?

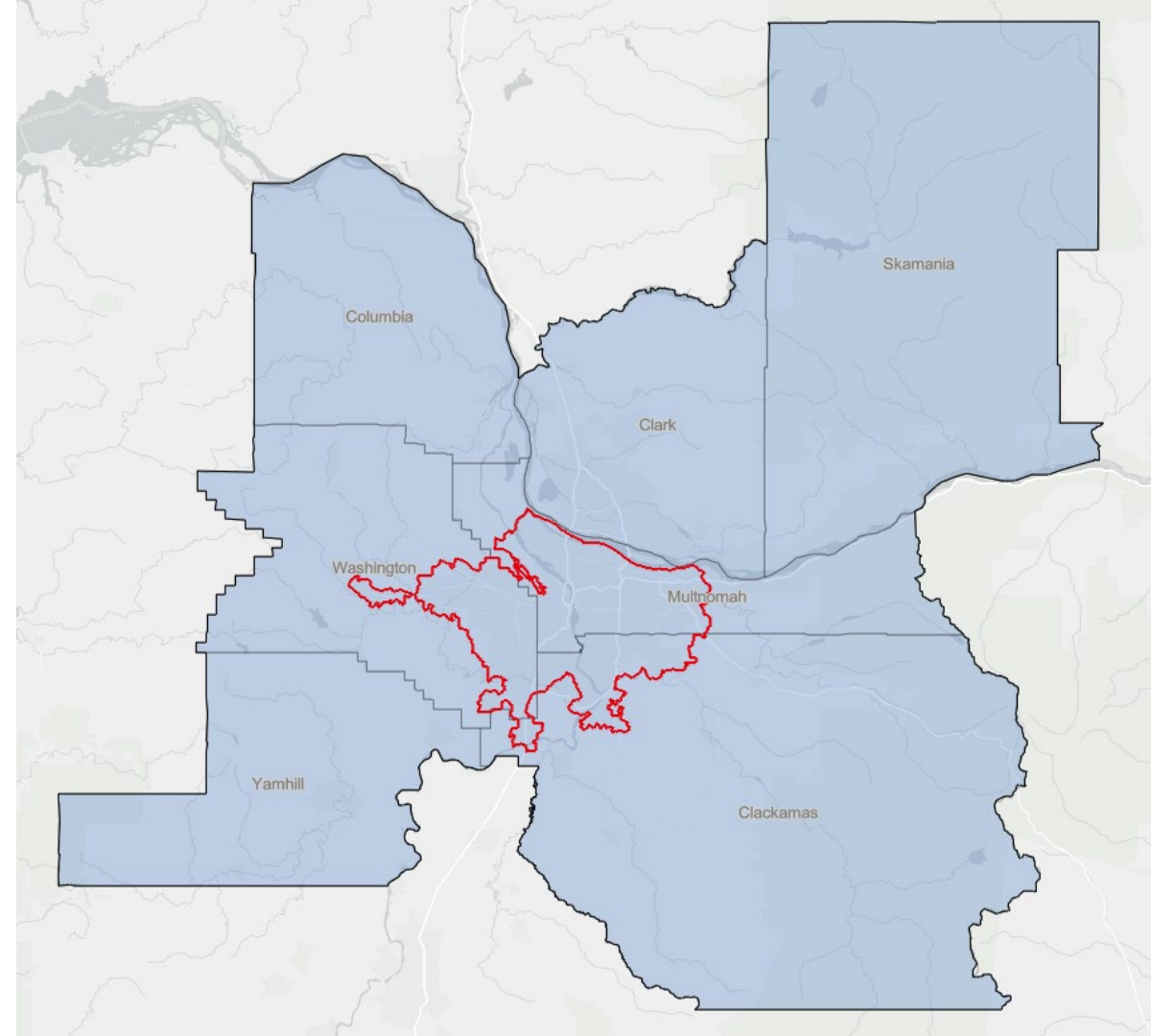


Context setting

- This is a forecast, not a plan
- The forecast is updated every 6 years
- Multiple peer review moments
- Projections are not the only factor in the UGM decision; we will return to discuss readiness and capacity

The forecast is a range – why?

- Acknowledgement of uncertainty
 - Population migration rates, including climate-induced migration
 - Macroeconomic conditions
 - Global events
 - Innovations that can't be forecasted, but that impact employment (e.g., potential impacts of AI on different sectors)

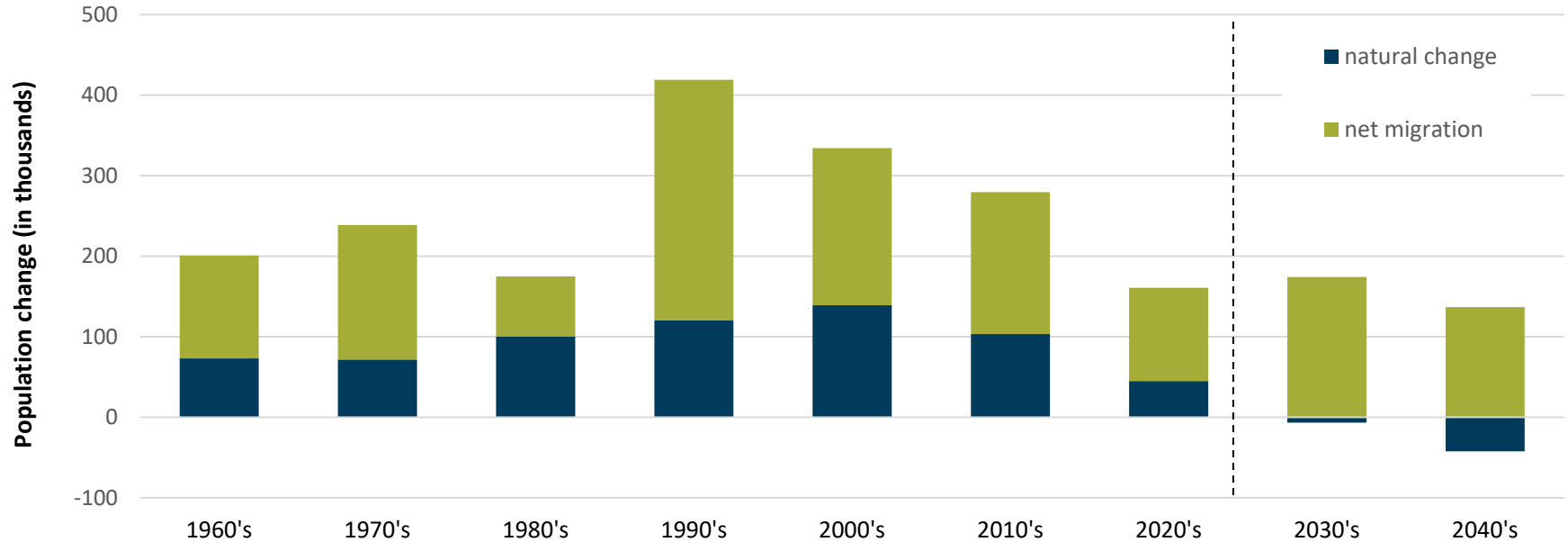


**Regional
forecast
geography**

Demographics

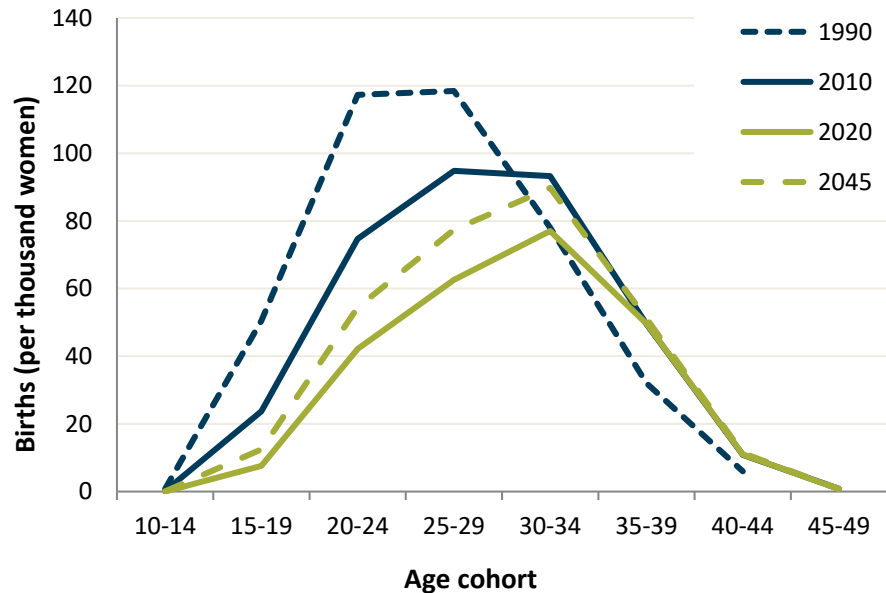
Population growth components

Components of MSA population growth

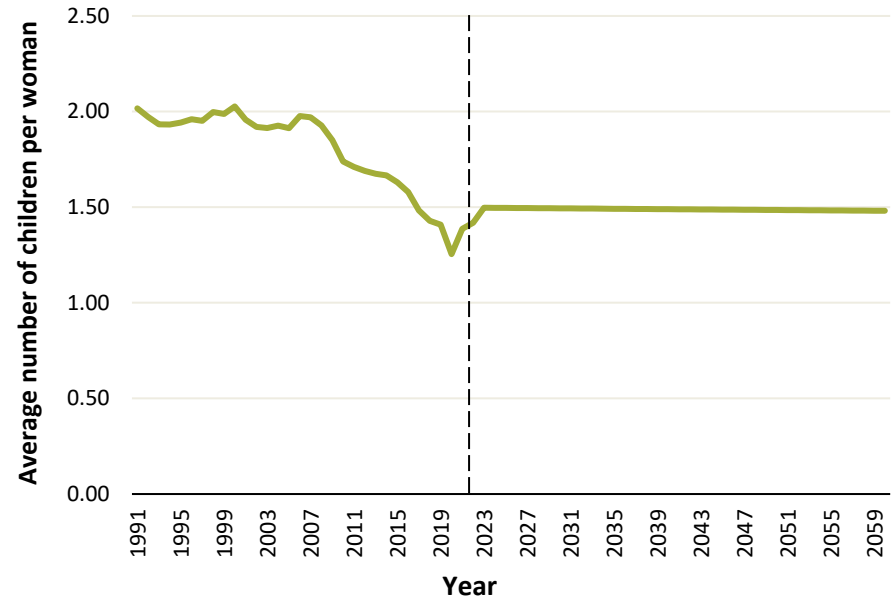


MSA birth rate assumptions

MSA Age-specific birth rate per 1,000 women

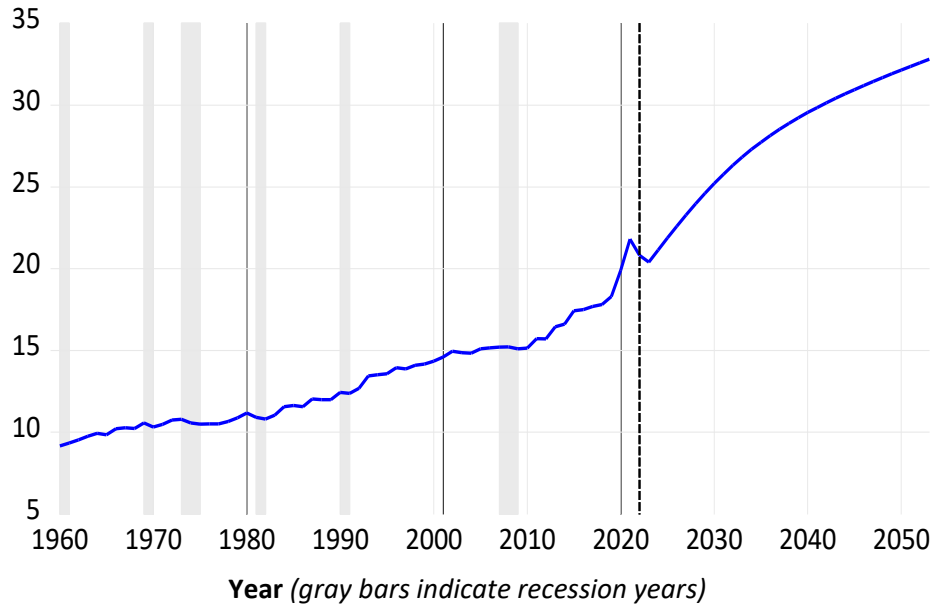


MSA total birth rate

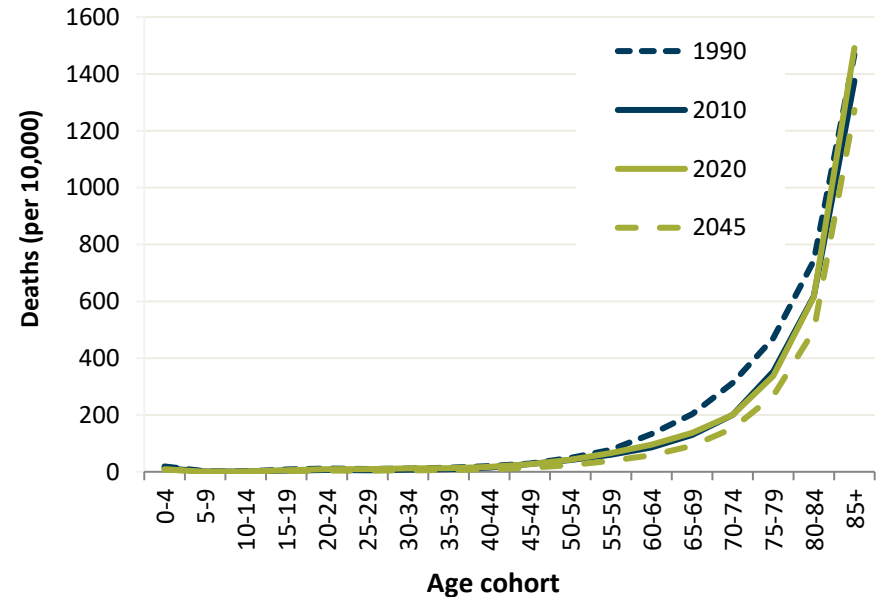


MSA mortality assumptions

MSA deaths (in thousands)

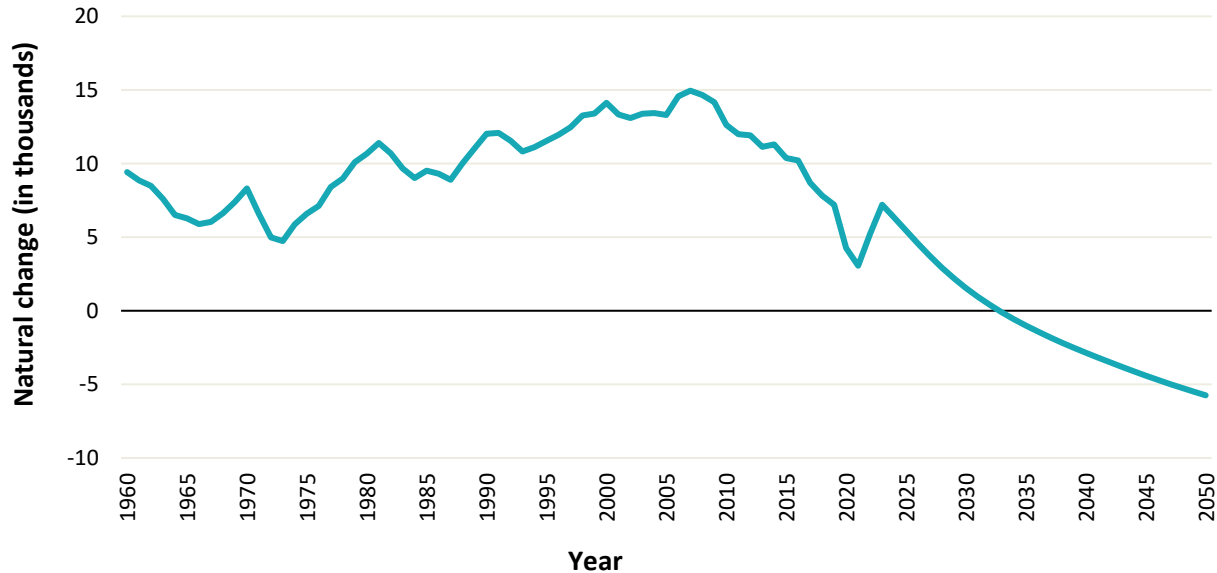


MSA Age-specific death rate per 10,000



Natural change

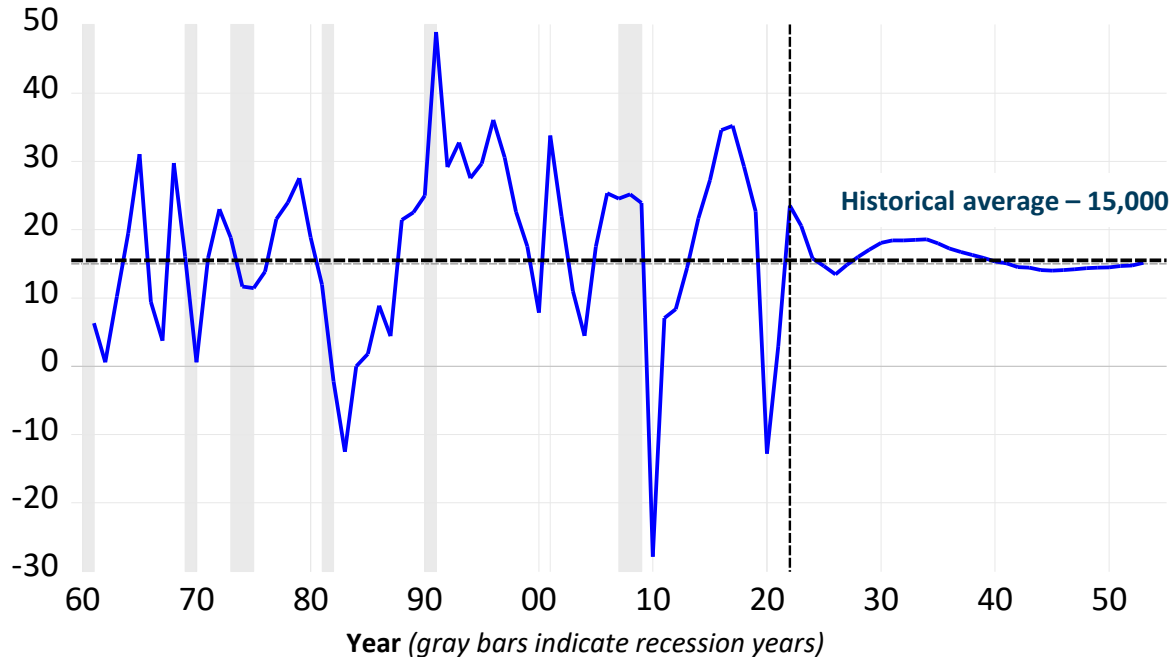
Natural change (births minus deaths)



- Declining birth rates are the biggest factor that make this forecast different than past forecasts
- National trend

Net migration

MSA Net Migration (in thousands)

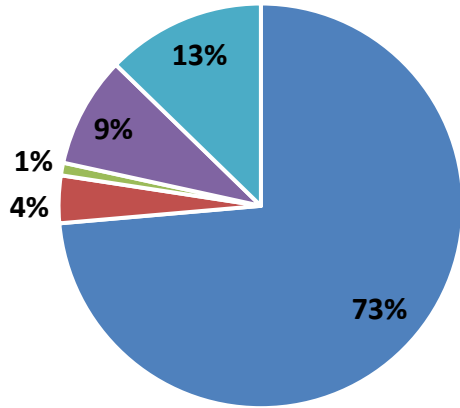


- Expect quality of life to continue attracting migrants
- Affordability and cost of living
- Climate refugees?

Increasing diversity

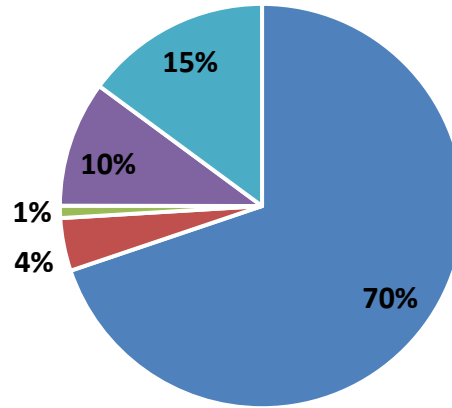
2020

Total population – 2,517,378



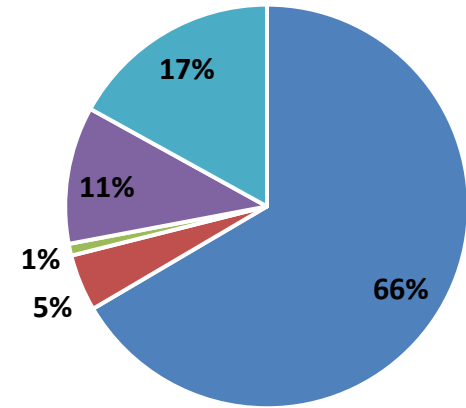
2030

Total forecast population – 2,700,038



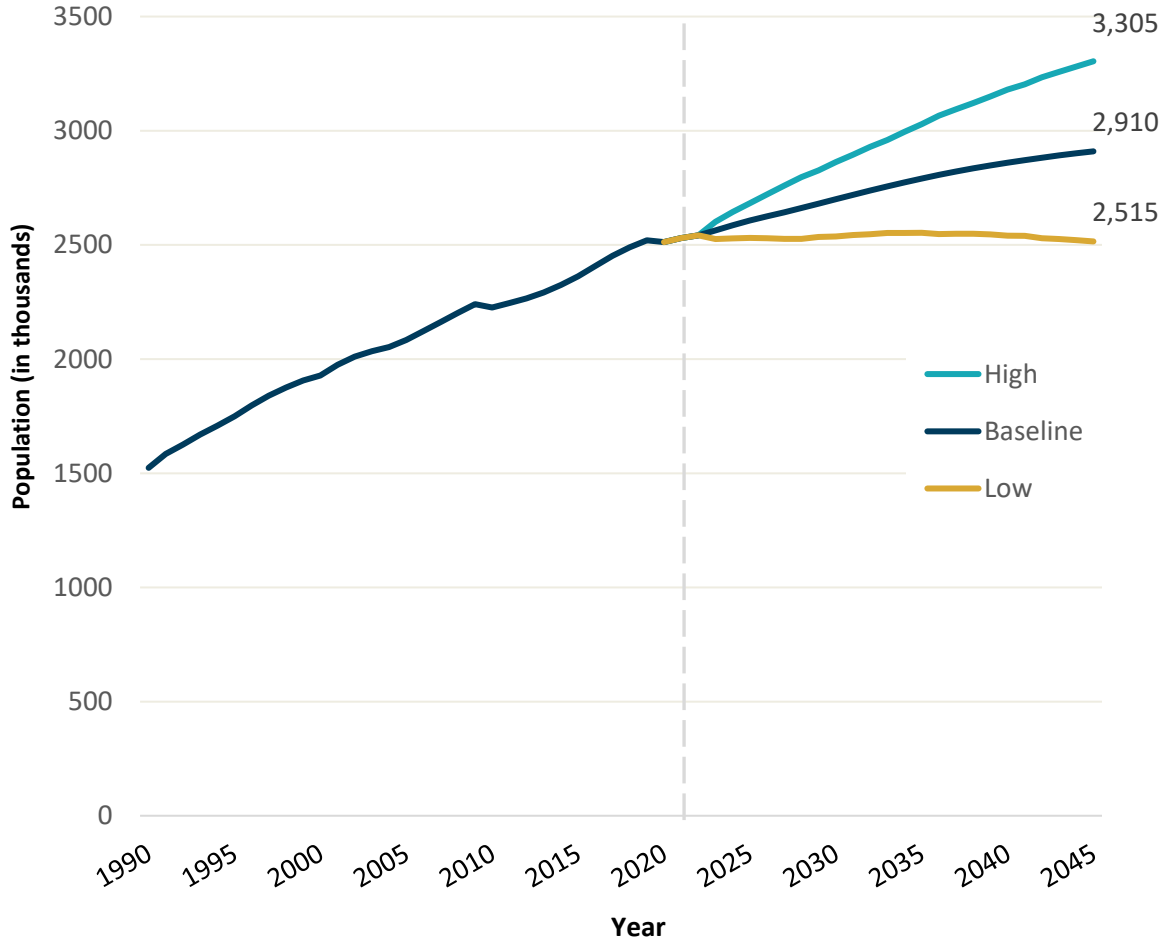
2040

Total forecast population – 2,860,301



■ White ■ Black ■ AIAN ■ API ■ Hispanic

MSA total population (in thousands)

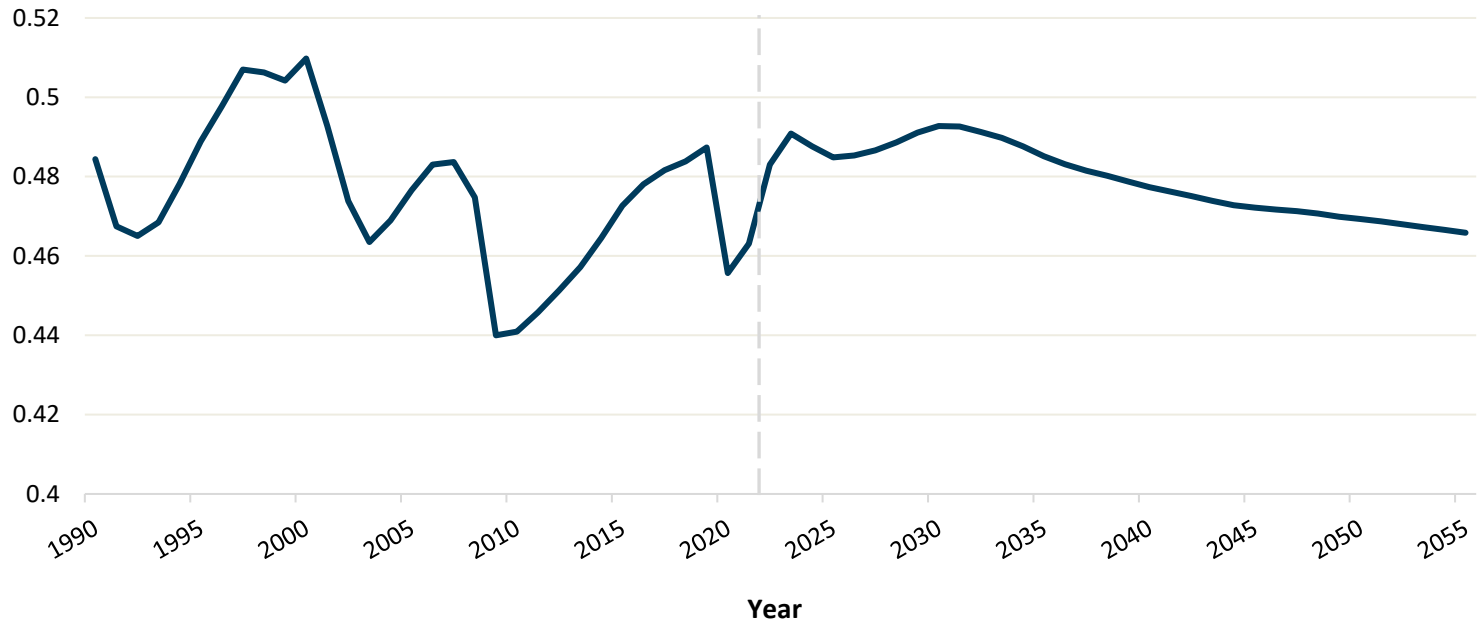


**Regional
demographic
outlook**

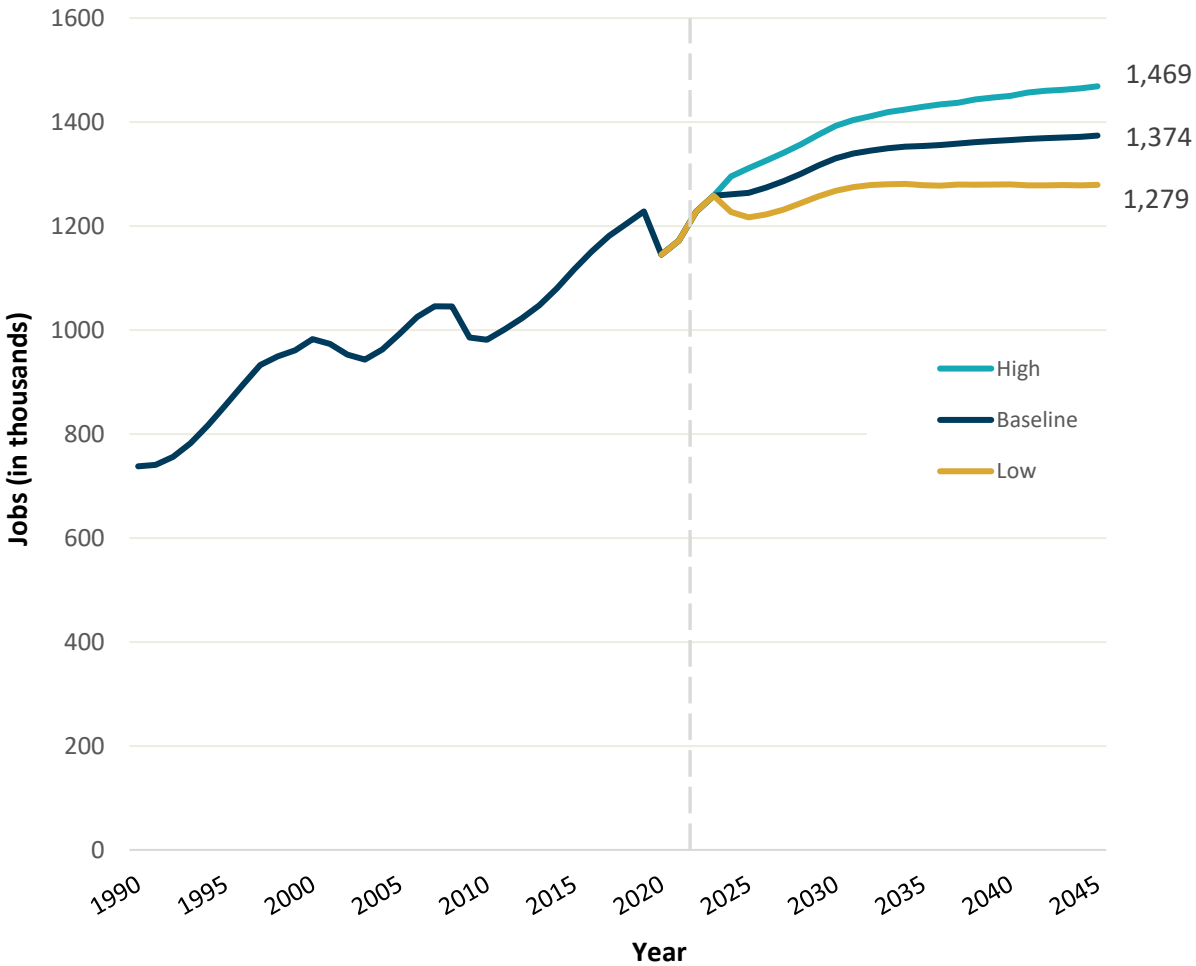
Employment

Labor force participation

Employment-Population ratio

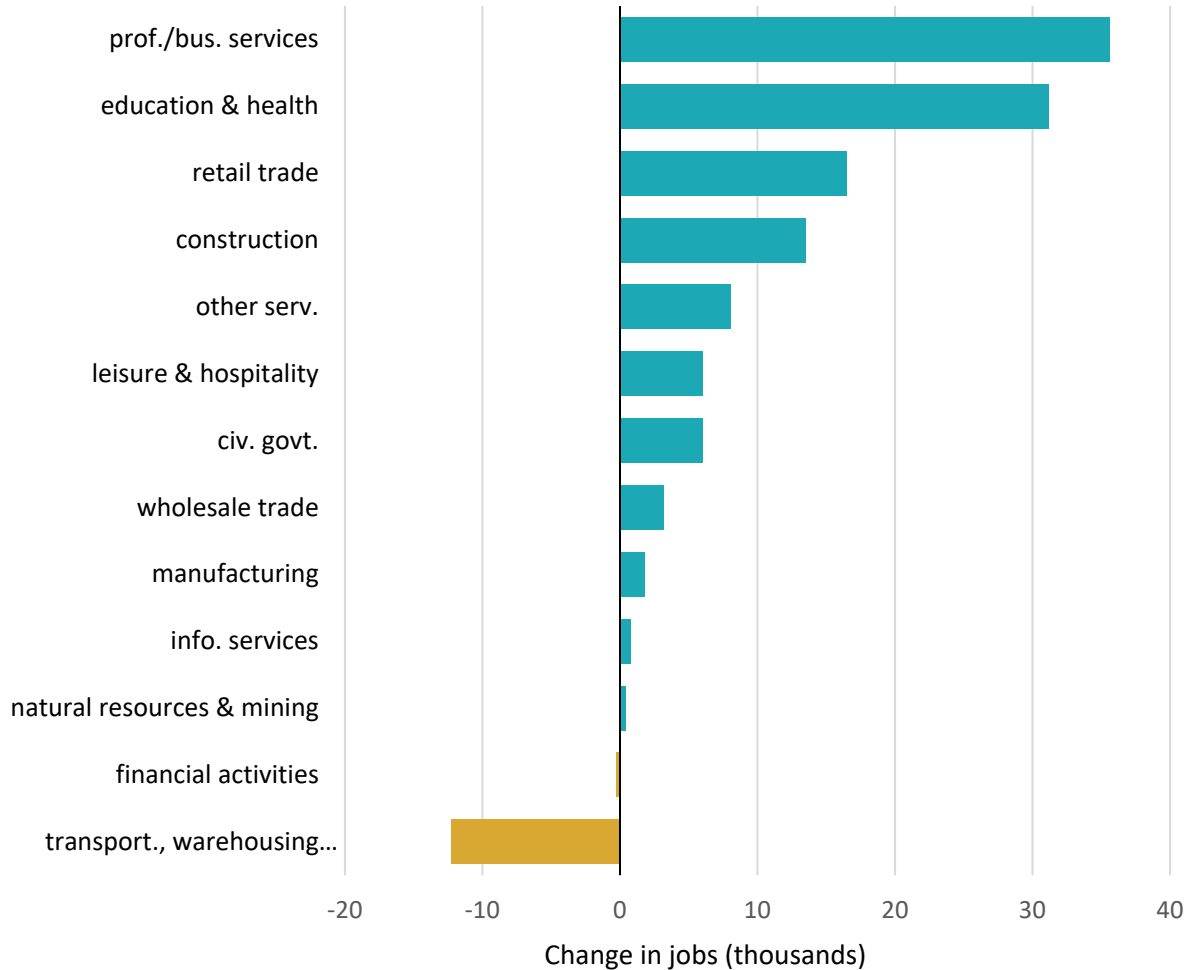


MSA payroll employment, total



**MSA
employment
outlook**

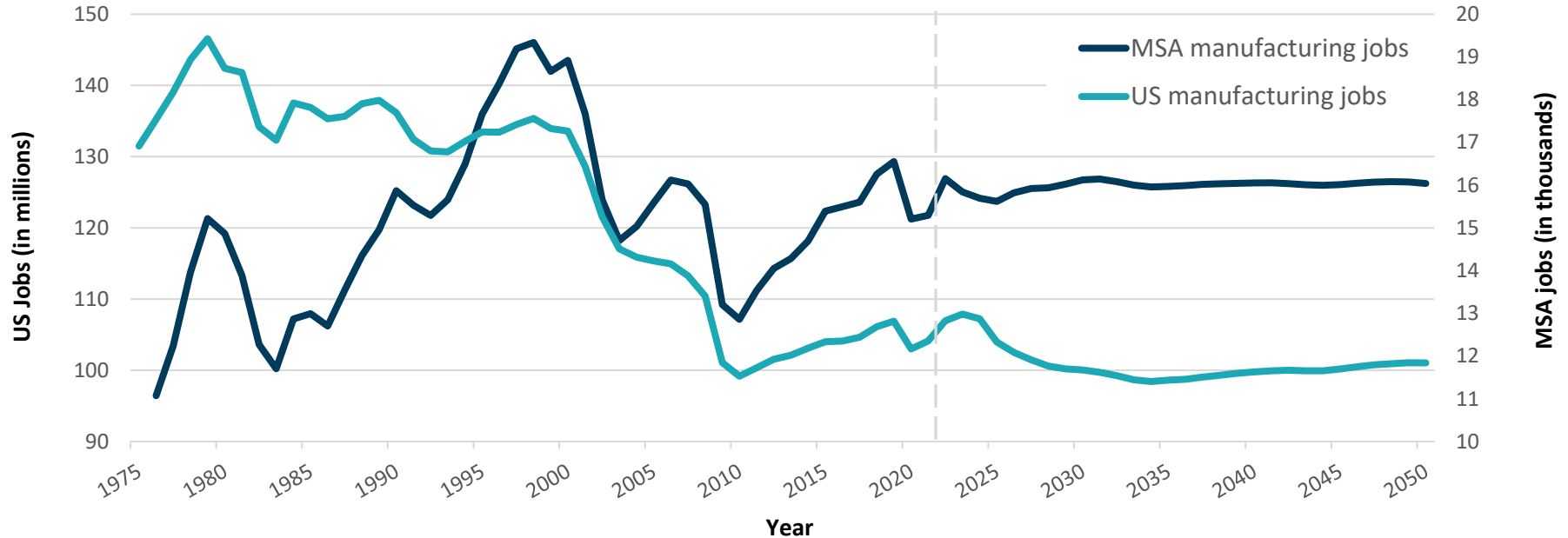
MSA change in Jobs 2024-2044 (in thousands)



**Sector-
specific
forecast**

A closer look at manufacturing

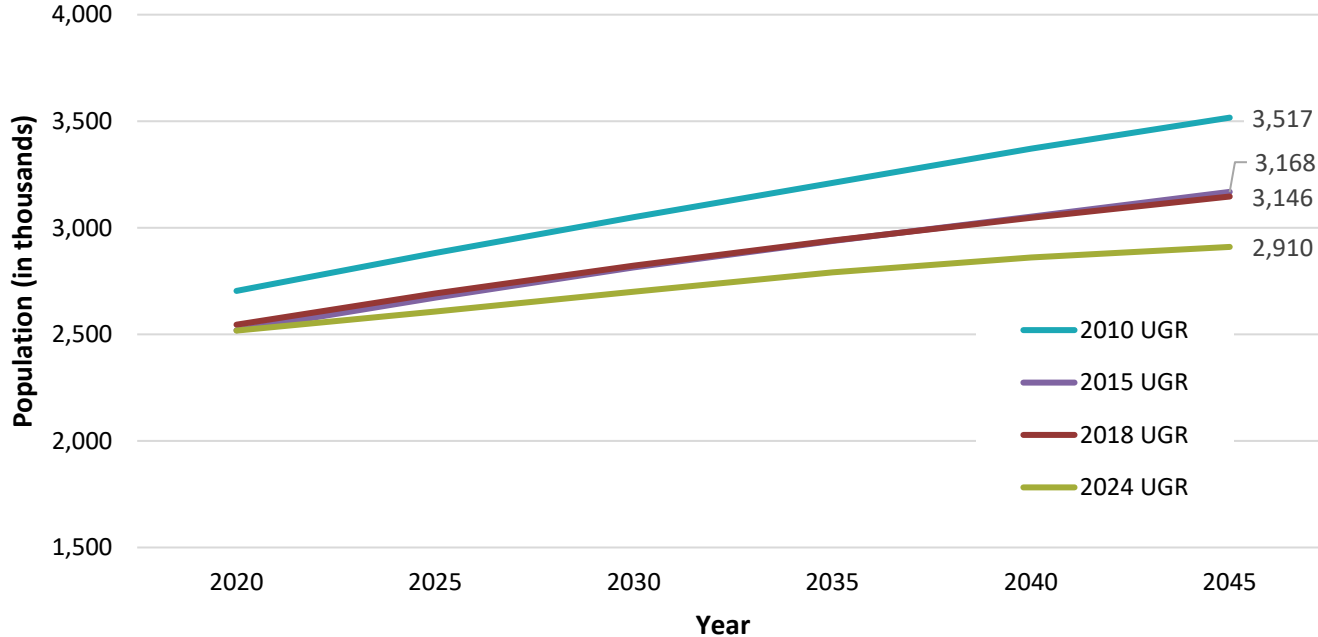
Manufacturing employment (US vs MSA)



Past UGR comparisons

Population forecast (in thousands)

Note: y-axis starts at 1500

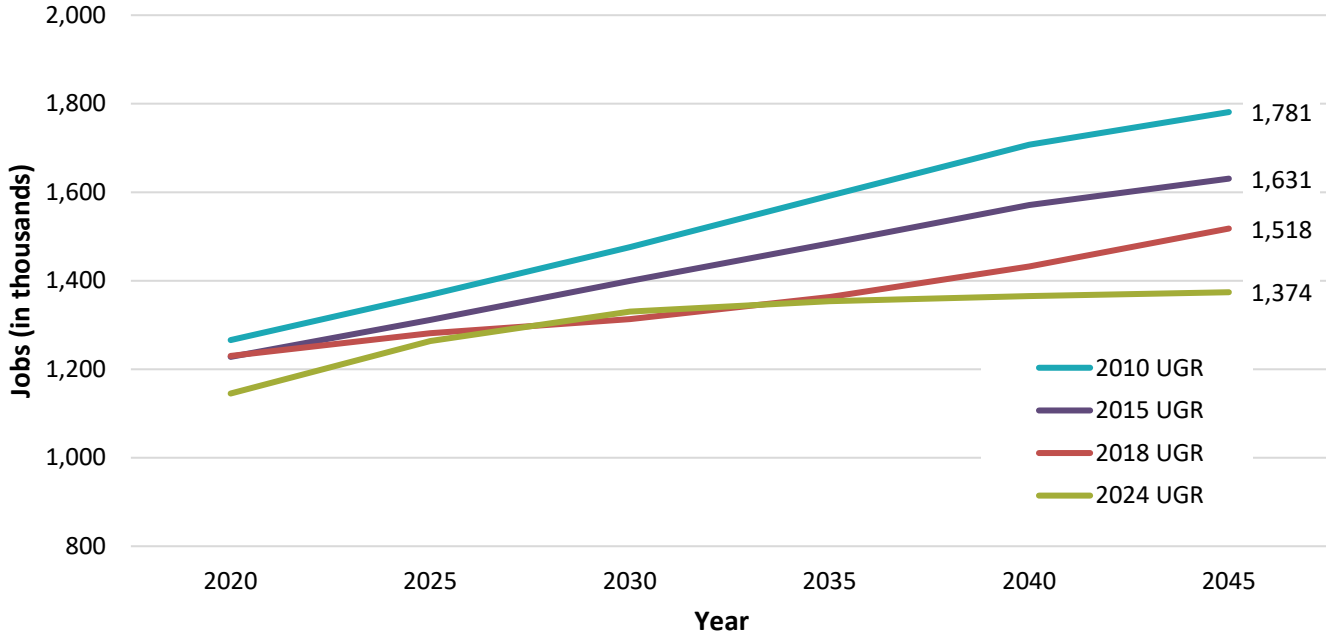


| 2045 forecast | MSA population | % change from previous UGR |
|-----------------|----------------|----------------------------|
| 2010 UGR | 3,517,200 | --- |
| 2015 UGR | 3,168,300 | -9.9% |
| 2018 UGR | 3,146,400 | -0.7% |
| 2024 UGR | 2,909,900 | -7.5% |

Past UGR comparisons

Employment forecast (in thousands)

Note: y-axis starts at 800



| 2045 forecast | MSA employment | % change from previous UGR |
|-----------------|----------------|----------------------------|
| 2010 UGR | 1,781,200 | --- |
| 2015 UGR | 1,630,600 | -8.5% |
| 2018 UGR | 1,518,000 | -6.9% |
| 2024 UGR | 1,373,900 | -9.5% |

Key takeaways

- We still expect to grow as a region, just at a slower pace - declining natural change is the driving factor
- Sector-specific gains are forecasted for professional and business services, education and health, retail, and construction. As manufacturing declines nationally, our region is holding steady
- This is a forecast, not a plan. Every 6 years, these projections are updated, and a new urban growth management decision is made

oregonmetro.gov

