

# Metropolitan Exposition Recreation Commission (MERC) agenda

Wednesday, September 3, 2025

12:30 PM

Oregon Convention Center,  
777 NE Martin Luther King Jr. Blvd. Portland  
Oregon, 97232,  
Room F150  
[https://us02web.zoom.us/j/81411140803?](https://us02web.zoom.us/j/81411140803?pwd=RATb1kMK7VnTrbyy1ObzzKefkj949G.1)  
[pwd=RATb1kMK7VnTrbyy1ObzzKefkj949G.1](https://us02web.zoom.us/j/81411140803?pwd=RATb1kMK7VnTrbyy1ObzzKefkj949G.1)

**1. Call To Order and Roll Call**

**2. Public Communication**

Public comment may be submitted in writing. It will also be heard in person and by electronic communication (video conference or telephone). Written comments should be submitted electronically by emailing [amy.nelson@oregonmetro.gov](mailto:amy.nelson@oregonmetro.gov). Testimony on agenda and non-agenda items will be taken at the beginning of the meeting.

Those wishing to testify orally are encouraged to sign up in advance by either: (a) contacting Amy Nelson by phone at 503-314-2360 and providing your name and the agenda item on which you wish to testify; or (b) registering by email by sending your name and the agenda item on which you wish to testify to [amy.nelson@oregonmetro.gov](mailto:amy.nelson@oregonmetro.gov). Those wishing to testify in person should fill out a card located on the table directly outside the meeting room door.

Those requesting to comment virtually during the meeting can do so by joining the meeting using this link: <https://us02web.zoom.us/j/87607282304?pwd=SFBiOVJHdWp0RVIRZU1uMDA0Vitqdz09> and using the "Raise Hand" feature in Zoom or emailing [amy.nelson@oregonmetro.gov](mailto:amy.nelson@oregonmetro.gov). Individuals will have three minutes to testify unless otherwise stated at the meeting.

**3. Commission/Council Liaison Communication**

**4. General Manager Communications**

**5. Financial Update**

5.1 MERC Finance Report

[MERC 25-35](#)

Presenter(s): Ashley Sloan, MERC Finance Manager

Attachments: [Finance Report](#)

**6. Venue Business Reports**

**7. Consent Agenda**

- 7.1 In Consideration of the July 2, 2025 MERC Meeting [MERC 25-36](#)  
Minutes  
Attachments: [Meeting Minutes](#)

**8. Action Agenda**

- 8.1 Resolution No. 25-06: For the purpose of increasing [RES 25-06](#)  
income thresholds for Metro's First Opportunity Target  
Area hiring program  
Presenter(s): Craig Stroud, General Manager, Visitor Venues  
Attachments: [Resolution No 25-06](#)  
[Staff Report](#)  
[Attachment A: FOTA Audit Report](#)

**9. Presentations**

- 9.1 Levy Annual Update **MERC 25-37**  
Presenter(s): Ed Strong, Vice President of Hospitality & Strategy at Levy  
Restaurants  
  
9.2 Travel Portland 4th Quarter Report [MERC 25-38](#)  
Presenter(s): James Jessie, Chief Sales Officer  
Jon Hixon, Senior Vice President of Business Strategy  
Desiree Everett, Vice President of Convention Sales and  
Services

Attachments: [Travel Portland 4th Quarter 2024-25 Report](#)

## Metro respects civil rights

Metro fully complies with Title VI of the Civil Rights Act of 1964, Title II of the Americans with Disabilities Act, Section 504 of the Rehabilitation Act and other statutes that ban discrimination. If any person believes they have been discriminated against regarding the receipt of benefits or services because of race, color, national origin, sex, age or disability, they have the right to file a complaint with Metro. For information on Metro's civil rights program, or to obtain a discrimination complaint form, visit [oregonmetro.gov/civilrights](http://oregonmetro.gov/civilrights) or call 503-797-1890. Metro provides services or accommodations upon request to persons with disabilities and people who need an interpreter at public meetings. If you need a sign language interpreter, communication aid or language assistance, call 503-797-1890 or TDD/TTY 503-797-1804 (8 a.m. to 5 p.m. weekdays) 5 business days before the meeting. All Metro meetings are wheelchair accessible. Individuals with service animals are welcome at Metro facilities, even where pets are generally prohibited. For up-to-date public transportation information, visit TriMet's website at [trimet.org](http://trimet.org)

### Thông báo về sự Metro không kỳ thị của

Metro tôn trọng dân quyền. Muốn biết thêm thông tin về chương trình dân quyền của Metro, hoặc muốn lấy đơn khiếu nại về sự kỳ thị, xin xem trong [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Nếu quý vị cần thông dịch viên ra dấu bằng tay, trợ giúp về tiếp xúc hay ngôn ngữ, xin gọi số 503-797-1700 (từ 8 giờ sáng đến 5 giờ chiều vào những ngày thường) trước buổi họp 5 ngày làm việc.

### Повідомлення Metro про заборону дискримінації

Metro з повагою ставиться до громадянських прав. Для отримання інформації про програму Metro із захисту громадянських прав або форми скарги про дискримінацію відвідайте сайт [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). або Якщо вам потрібен перекладач на зборах, для задоволення вашого запиту зателефонуйте за номером 503-797-1700 з 8.00 до 17.00 у робочі дні за п'ять робочих днів до зборів.

### Metro 的不歧视公告

尊重民權。欲瞭解Metro民權計畫的詳情，或獲取歧視投訴表，請瀏覽網站 [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)。如果您需要口譯方可參加公共會議，請在會議召開前5個營業日撥打503-797-1700（工作日上午8點至下午5點），以便我們滿足您的要求。

### Ogeysiiska takooris la'aanta ee Metro

Metro waxay ixtiraamtaa xuquuqda madaniga. Si aad u heshid macluumaad ku saabsan barnaamijka xuquuqda madaniga ee Metro, ama aad u heshid warqadda ka cabashada takoorista, booqo [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Haddii aad u baahan tahay turjubaan si aad uga qaybqaadatid kullaan dadweyne, wac 503-797-1700 (8 gallinka hore illaa 5 gallinka dambe maalmaha shaqada) shan maalmo shaqo ka hor kullanka si loo tixgaliyo codsashadaada.

### Metro의 차별 금지 관련 통지서

Metro의 시민권 프로그램에 대한 정보 또는 차별 항의서 양식을 얻으려면, 또는 차별에 대한 불만을 신고 할 수 [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). 당신의 언어 지원이 필요한 경우, 회의에 앞서 5 영업일 (오후 5시 주중에 오전 8시) 503-797-1700를 호출합니다.

### Metro의差別禁止通知

Metroでは公民権を尊重しています。Metroの公民権プログラムに関する情報について、または差別苦情フォームを入手するには、[www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)。までお電話ください。公開会議で言語通訳を必要とされる方は、Metroがご要請に対応できるよう、公開会議の5営業日前までに503-797-1700（平日午前8時～午後5時）までお電話ください。

### សេចក្តីជូនដំណឹងអំពីការមិនរើសអើងរបស់ Metro

ការគោរពសិទ្ធិពលរដ្ឋរបស់ ។ សំរាប់ព័ត៌មានអំពីកម្មវិធីសិទ្ធិពលរដ្ឋរបស់ Metro ឬដើម្បីទទួលបានការបណ្តឹងរើសអើងសូមចូលទស្សនាគេហទំព័រ [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights)។  
បើលោកអ្នកត្រូវការអ្នកបកប្រែភាសានៅពេលអង្គប្រជុំសាធារណៈ សូមទូរស័ព្ទមកលេខ 503-797-1700 (ម៉ោង 8 ព្រឹកដល់ម៉ោង 5 ល្ងាច ថ្ងៃច័ន្ទិក) ប្រាំពីរថ្ងៃ មុនថ្ងៃប្រជុំដើម្បីអាចឱ្យគេសម្រួលតាមសំណើរបស់លោកអ្នក។

### إشعار بعدم التمييز من Metro

تحتزم Metro الحقوق المدنية. للمزيد من المعلومات حول برنامج Metro للحقوق المدنية أو لإيداع شكوى ضد التمييز، يرجى زيارة الموقع الإلكتروني [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). إن كنت بحاجة إلى مساعدة في اللغة، يجب عليك الاتصال مقدماً برقم الهاتف 503-797-1700 (من الساعة 8 صباحاً حتى الساعة 5 مساءً، أيام الاثنين إلى الجمعة) قبل خمسة (5) أيام عمل من موعد الاجتماع.

### Paunawa ng Metro sa kawalan ng diskriminasyon

Iginagalang ng Metro ang mga karapatang sibil. Para sa impormasyon tungkol sa programa ng Metro sa mga karapatang sibil, o upang makakuha ng porma ng reklamo sa diskriminasyon, bisitahin ang [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Kung kailangan ninyo ng interpreter ng wika sa isang pampublikong pulong, tumawag sa 503-797-1700 (8 a.m. hanggang 5 p.m. Lunes hanggang Biyernes) lima araw ng trabaho bago ang pulong upang mapagbigyan ang inyong kahilingan.

### Notificación de no discriminación de Metro

Metro respeta los derechos civiles. Para obtener información sobre el programa de derechos civiles de Metro o para obtener un formulario de reclamo por discriminación, ingrese a [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Si necesita asistencia con el idioma, llame al 503-797-1700 (de 8:00 a. m. a 5:00 p. m. los días de semana) 5 días laborales antes de la asamblea.

### Уведомление о недопущении дискриминации от Metro

Metro уважает гражданские права. Узнать о программе Metro по соблюдению гражданских прав и получить форму жалобы о дискриминации можно на веб-сайте [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Если вам нужен переводчик на общественном собрании, оставьте свой запрос, позвонив по номеру 503-797-1700 в рабочие дни с 8:00 до 17:00 и за пять рабочих дней до даты собрания.

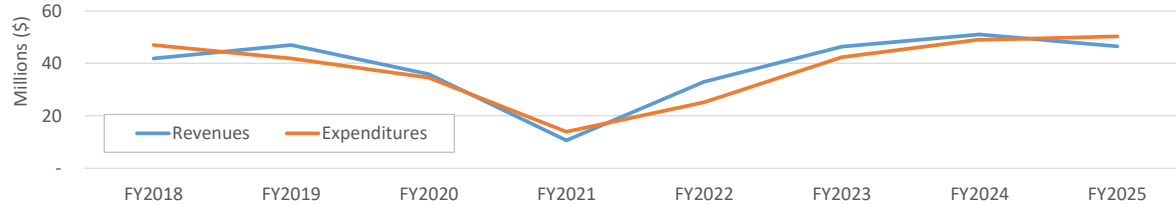
### Avizul Metro privind nediscriminare

Metro respectă drepturile civile. Pentru informații cu privire la programul Metro pentru drepturi civile sau pentru a obține un formular de reclamație împotriva discriminării, vizitați [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Dacă aveți nevoie de un interpret de limbă la o ședință publică, sunați la 503-797-1700 (între orele 8 și 5, în timpul zilelor lucrătoare) cu cinci zile lucrătoare înainte de ședință, pentru a putea să vă răspunde în mod favorabil la cerere.

### Metro txoj kev ntxub ntxaug daim ntawv ceeb toom

Metro tributes cai. Rau cov lus qhia txog Metro txoj cai kev pab, los yog kom sau ib daim ntawv tsis txaus siab, mus saib [www.oregonmetro.gov/civilrights](http://www.oregonmetro.gov/civilrights). Yog hais tias koj xav tau lus kev pab, hu rau 503-797-1700 (8 teev sawv ntov txog 5 teev tsaus ntuj weekdays) 5 hnub ua hauj lwm ua ntej ntawm lub rooj sib tham.

# OREGON CONVENTION CENTER



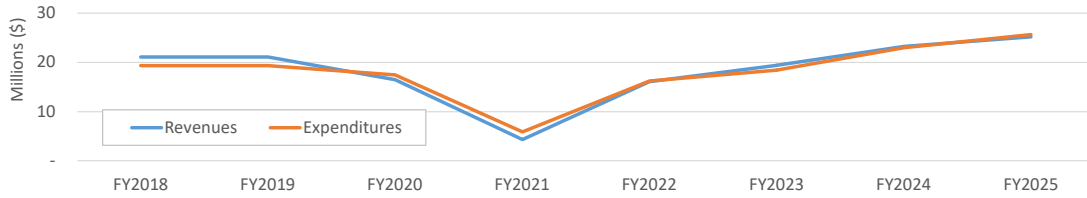
2024-25 Budget to Actual					YTD vs Prior Fiscal Year		
OPERATIONS	Adopted Budget	YTD Actuals	% Var	\$ Var	FY24 Actuals	% Var	\$ Var
<b>REVENUES</b>							
<b>Charges for Services</b>							
Food & Beverage	14,864,290	14,663,073	-1%	(201,217)	17,675,234	-17%	(3,012,161)
Facility Rentals	5,800,184	4,829,626	-17%	(970,558)	5,612,937	-14%	(783,312)
Audio Visual	2,940,000	3,602,841	23%	662,841	3,346,442	8%	256,399
Parking Revenue	2,305,000	2,093,078	-9%	(211,922)	2,008,026	4%	85,052
All Other (Utility, Telecom, Etc.)	3,904,964	4,374,183	12%	469,219	4,908,402	-11%	(534,219)
<b>Local Government Shared Revenues</b>							
Lodging Excise Tax	14,901,200	14,131,379 *	-5%	(769,821)	14,515,308	-3%	(383,929)
Visitor Facilities Trust Account	2,683,500	2,209,500	-18%	(474,000)	1,841,250	20%	368,250
<b>Grants</b>	-	23,126	-	23,126	243,896	-91%	(220,770)
<b>Interest Earnings</b>	384,311	568,160	48%	183,849	741,476	-23%	(173,316)
<b>Miscellaneous Revenue</b>	13,500	64,734	380%	51,234	58,054	12%	6,680
<b>REVENUE TOTAL</b>	<b>47,796,949</b>	<b>46,559,700</b>	<b>-3%</b>	<b>(1,237,249)</b>	<b>51,007,901</b>	<b>-9%</b>	<b>(4,448,202)</b>
<b>EXPENDITURES</b>							
<b>Food &amp; Beverage</b>	11,319,385	14,504,417	-28%	(3,185,032)	15,365,815	-6%	(861,398)
<b>Administration</b>	2,364,053	1,427,040	40%	937,013	1,527,163	-7%	(100,123)
<b>Strategy &amp; Business Development</b>							
Marketing & Sales	6,870,429	6,914,502	-1%	(44,073)	7,023,383	-2%	(108,882)
Admissions	337,636	380,305	-13%	(42,669)	322,205	18%	58,100
Ticket Services	8,074	58,644	-626%	(50,570)	30,080	95%	28,564
Guest Experience	668,555	739,179	-11%	(70,624)	611,627	21%	127,553
Parking	1,291,793	1,352,347	-5%	(60,554)	975,222	39%	377,125
<b>Facilities &amp; Operations</b>							
Facility Management	6,194,304	5,616,797	9%	577,507	4,951,268	13%	665,529
Utility Services	937,500	1,137,232	-21%	(199,732)	1,219,251	-7%	(82,019)
Audio Visual	2,226,000	2,389,128	-7%	(163,128)	2,667,622	-10%	(278,494)
Telecommunications	926,259	792,322	14%	133,937	571,923	39%	220,400
<b>Event Services</b>							
Setup	4,690,076	4,098,099	13%	591,977	4,026,359	2%	71,740
Event Operations	1,367,307	1,339,816	2%	27,491	1,155,783	16%	184,034
<b>Public Safety</b>	2,482,699	2,378,670	4%	104,029	2,312,386	3%	66,283
<b>Non-Dept.</b>							
Materials and Services	886,500	886,500	0%	-	738,713	20%	147,787
CAP Transfers	6,341,845	6,341,845	0%	-	5,541,036	14%	800,809
<b>EXPENDITURE TOTAL</b>	<b>48,912,415</b>	<b>50,356,844</b>	<b>-3%</b>	<b>(1,444,429)</b>	<b>49,039,836</b>	<b>3%</b>	<b>1,317,008</b>
<b>NET OPERATIONS</b>	<b>(1,115,466)</b>	<b>(3,797,144)</b>			<b>1,968,065</b>		

FY2024 -25 Capital Projects					FY2024 Capital Projects		
	Adopted Budget	YTD Actuals	% Var	\$ Var	FY24 Actuals	% Var	\$ Var
REVENUES	1,860,355	1,571,579	-16%	(288,776)	276,180	469%	1,295,399
EXPENSES	7,552,250	4,861,102	36%	2,691,148	4,283,668	13%	577,434
<b>NET</b>	<b>(5,691,895)</b>	<b>(3,289,524)</b>			<b>(4,007,488)</b>		

20,895,128	FY2024-25 Beginning Fund Balance
(7,086,668)	Change in Fund Balance
13,808,460	Ending Fund Balance

\* Includes \$1.9M estimate for August TLT collections. Final payment to be reflected in third accounting close in September 2025.

# PORTLAND'S PERFORMING ARTS VENUES



2024-25 Budget to Actual				
OPERATIONS	Adopted Budget	YTD Actuals	% Var	\$ Var
REVENUES				
<b>Charges for Services</b>				
Food & Beverage	1,572,208	1,800,217	15%	228,009
Ticket Services	7,344,054	8,042,084	10%	698,030
Production Services	3,522,659	3,258,230	-8%	(264,429)
Booking & Sales	2,700,470	2,634,758	-2%	(65,712)
P5 Presents	1,485,750	1,446,449	-3%	(39,301)
Admissions	2,056,206	1,750,306	-15%	(305,900)
All Other (Utility, Telecom, Etc.)	2,204,326	2,032,693	-8%	(171,633)
<b>Local Government Shared Revenues</b>				
Lodging Excise Tax	1,603,971	1,495,043	-7%	(108,928)
Visitor Facilities Trust Account	684,000	684,000	0%	-
Contributions from Governments	1,125,135	1,175,255	4%	50,120
Contributions from Private Sources	109,580	-	-100%	(109,580)
Grants	-	82,613		82,613
Interest Earnings	292,149	709,725	143%	417,576
Miscellaneous Revenue	43,000	(15,641)	-136%	(58,641)
Transfers-R	125,000	75,000	-40%	(50,000)
<b>REVENUE TOTAL</b>	<b>24,868,508</b>	<b>25,170,734</b>	<b>1%</b>	<b>302,226</b>

YTD vs Prior Fiscal Year		
FY24 Actuals	% Var	\$ Var
1,746,423	3%	53,794
7,654,979	5%	387,105
2,657,071	23%	601,159
2,457,732	7%	177,026
969,923	49%	476,526
1,483,457	18%	266,850
2,199,881	-8%	(167,188)
-	-	-
1,585,995	-6%	(90,952)
570,000	20%	114,000
1,119,400	5%	55,855
-	-	-
-	-	82,613
846,239	-16%	(136,514)
51,854	-130%	(67,495)
-	-	75,000
<b>23,342,955</b>	<b>8%</b>	<b>1,827,778</b>

EXPENDITURES				
Food & Beverage	100,000	104,546	-5%	(4,546)
Administration	1,420,489	1,406,961	1%	13,528
<b>Sales &amp; Promotion</b>				
Booking & Sales	587,801	500,007	15%	87,794
Marketing & Advertisement	452,953	389,958	14%	62,995
Promoted Shows (P5 Presents)	1,457,886	1,422,432	2%	35,454
<b>Culture &amp; Community</b>				
Youth Arts Program	144,330	142,460	1%	1,870
<b>Facility Operations</b>				
Maintenance & Custodial	5,151,339	5,194,839	-1%	(43,500)
Security	2,558,629	2,158,052	16%	400,577
<b>Event Services</b>				
Event Coordination	1,638,805	1,695,700	-3%	(56,895)
Production Services	3,751,143	3,560,416	5%	190,727
Front of House	1,746,141	1,643,803	6%	102,338
Volunteer Services	154,710	129,691	16%	25,019
Ticket Services	2,959,590	3,058,333	-3%	(98,743)
<b>Non-Dept</b>				
Grants and Loans	125,000	75,000	40%	50,000
CAP Transfers	3,625,450	3,625,450	0%	-
<b>EXPENDITURE TOTAL</b>	<b>26,599,544</b>	<b>25,626,686</b>	<b>4%</b>	<b>972,858</b>

71,567	46%	32,979
1,298,881	8%	108,080
536,281	-7%	(36,274)
313,314	24%	76,644
951,250	50%	471,182
551,665	-6%	(32,625)
-	-	142,460
5,324,849	-2%	(130,010)
1,159,398	86%	998,655
899,435	89%	796,265
3,698,277	-4%	(137,861)
2,026,237	-19%	(382,434)
121,340	7%	8,351
2,636,685	16%	421,648
-	-	75,000
3,353,963	8%	271,487
<b>22,943,140</b>	<b>12%</b>	<b>2,683,546</b>

<b>NET OPERATIONS</b>	<b>(1,731,036)</b>	<b>(455,952)</b>
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<b>399,816</b>
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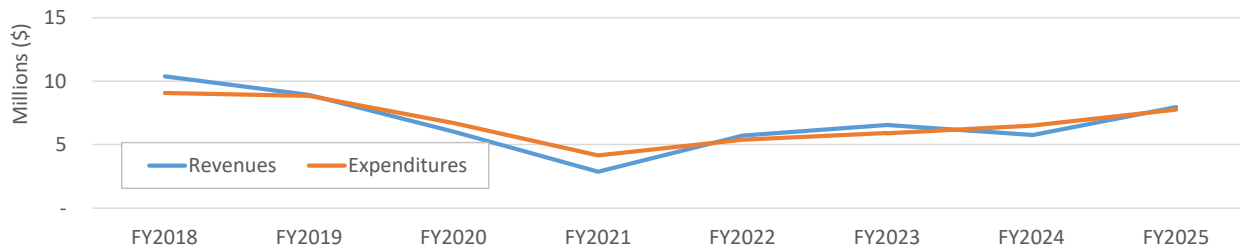
FY2024-25 Capital Projects				
	Adopted Budget	YTD Actuals	% Var	\$ Var
REVENUES	2,000,000	1,024,374	-49%	(975,626)
EXPENSES	6,854,200	5,104,015	26%	1,750,185
<b>NET</b>	<b>(4,854,200)</b>	<b>(4,079,641)</b>		

FY2024 Capital Projects		
FY24 Actuals	% Var	\$ Var
-	-	1,024,374
5,189,032	-2%	(85,017)
<b>(5,189,032)</b>		

9,485,449	FY2024-25 Beginning Fund Balance
(4,535,594)	Change in Fund Balance
4,949,856	Ending Fund Balance

\* Includes \$200k estimate for August TLT collections. Final payment to be reflected in third accounting close in September 2025.

# PORTLAND EXPO CENTER



2024-25 Budget to Actual				
OPERATIONS	Adopted Budget	YTD Actuals	% Var	\$ Var
REVENUES				
Charges for Services				
Food & Beverage	579,000	577,062	0%	(1,938)
Facility Rentals	2,142,042	2,123,308	-1%	(18,734)
Parking Revenue	2,202,158	2,155,527	-2%	(46,631)
Ticket Services	389,730	407,455	5%	17,725
All Other (Utility, Telecom, Etc.)	927,975	895,687	-3%	(32,288)
Local Government Shared Revenues				-
Visitor Facilities Trust Account	517,500	517,500	0%	-
Interest Earnings	75,000	22,600	-70%	(52,400)
Miscellaneous Revenue	82,500	63,925	-23%	(18,575)
Transfers-R	1,200,000	1,200,000	0%	-
<b>REVENUE TOTAL</b>	<b>8,115,905</b>	<b>7,963,063</b>	<b>-2%</b>	<b>(152,842)</b>

YTD vs Prior Fiscal Year		
FY24 Actuals	% Var	\$ Var
469,330	23%	107,732
1,892,298	12%	231,009
1,592,171	35%	563,355
382,672	6%	24,783
818,771	9%	76,916
-	-	-
431,250	20%	86,250
99,418	-77%	(76,818)
68,223	-6%	(4,298)
-	-	1,200,000
<b>5,754,133</b>	<b>38%</b>	<b>2,208,930</b>

EXPENDITURES				
Food & Beverage	46,000	56,911	-24%	(10,911)
Administration	732,460	902,808	-23%	(170,348)
Sales & Marketing	434,658	402,506	7%	32,152
Facility Operations	2,783,447	2,622,237	6%	161,210
Special Services	554,014	399,740	28%	154,274
Event Coordination	544,477	610,329	-12%	(65,852)
Admissions	88,851	89,849	-1%	(997)
Ticket Services	277,422	219,075	21%	58,347
Parking	522,593	485,882	7%	36,711
Non-Dept				
CAP Transfers	1,966,569	1,966,032	0%	537
<b>EXPENDITURE TOTAL</b>	<b>7,950,491</b>	<b>7,755,368</b>	<b>2%</b>	<b>195,123</b>

16,696	241%	40,215
570,056	58%	332,751
362,099	11%	40,408
2,030,244	29%	591,993
451,013	-11%	(51,273)
507,261	20%	103,068
76,422	18%	13,426
200,812	9%	18,263
387,111	26%	98,771
-	-	-
1,906,222	3%	59,810
<b>6,507,936</b>	<b>19%</b>	<b>1,247,432</b>

<b>NET OPERATIONS</b>	<b>165,414</b>	<b>207,695</b>
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<b>(753,803)</b>
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FY2024-25 Capital Projects				
	Adopted Budget	YTD Actuals	% Var	\$ Var
REVENUES	558,004	64,284	-88%	(493,720)
EXPENSES	1,674,100	1,587,178	5%	86,922
<b>NET</b>	<b>(1,116,096)</b>	<b>(1,522,894)</b>		

FY2024 Capital Projects		
FY24 Actuals	% Var	\$ Var
-	-	-
524,930	202%	1,062,248
<b>(524,930)</b>		

1,976,860	FY2024-25 Beginning Fund Balance
(1,315,199)	Change in Fund Balance
661,661	Ending Fund Balance

# Meeting Minutes

## Meeting details:

Meeting: Metropolitan Exposition Recreation Commission Meeting  
Date: July 2, 2025  
Time: 12:30pm - 2:30 pm  
Place: Zoom

### Commissioners present:

Chair Karis Stoudamire-Phillips, Deidra-Krys-Rusoff, Damien Hall, Dañel Malán-González, Chris Oxley, Deanna Palm, and David Penilton

### Commissioners excused:

none

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### **Call to Order and Roll Call**

Chair Stoudamire-Phillips called the meeting to order at 12:34pm

### **Public Communication**

- Chair Stoudamire-Phillips opened the meeting to members of the public wanting to testify on agenda and non-agenda items

### **Commission / Council Liaison Communication**

- Commissioner Krys-Rusoff expressed appreciation to Portland's staff for hosting a staff appreciation BBQ and highlighted the value of direct engagement with frontline workers
- Commissioner Penilton and Chair Stoudamire-Phillips echoed their appreciation for the event

### **General Manager Communications**

Craig Stroud provided the following updates:

- Visitor Development Fund: The financial review team for the Visitor Development Fund met in mid-June to examine its financial stability and debt capacity over the next 20 years. No decisions were made. The next step is for elected officials from the city, county, and Metro to provide guidance to the board.
- FY2026 Budget: Craig thanked Rachel Lembo and Cindy Wallace for their leadership during the challenging budget process.
- Leadership Restructure: The Office of the Chief Operating Officer has undergone a restructuring. Craig's portfolio has expanded to include the Oregon Zoo, which aligns with historical General Manager responsibilities. This restructuring will also provide resources for the Expo Future project.

### **Financial Update**

Ashley Sloan, MERC Finance Manager presented a report covering July through May of the FY2025 fiscal year.



- All venues are trending at or slightly below budgeted revenue and are spending 2-3% less than budgeted expenses.
- Personnel savings across all venues amount to approximately \$2 million, achieved through hiring delays and attrition.
- Oregon Convention Center (OCC): Had a good sales month for food and beverage in April and May, boosting net revenue by \$95,000 month-over-month. The OCC is forecasting 4% less revenue and 1% less in expenses than budgeted.
- Portland's Centers for the Arts (P5): Is beating its budget by 2%, expecting about \$530,000 more in revenue than budgeted. May's food and beverage and ticket services revenues have already exceeded their budgeted amounts. P5 had budgeted a \$1.7 million operating loss but is now forecasting a \$600,000 loss.
- Expo Center: Is forecasting 2% less than budgeted revenue and expenses. They budgeted a \$635,000 operating loss and are expecting a \$541,000 loss. A budget amendment transferred \$800,000 from the General Fund to help bolster the Expo's fund balance during the reorganization.
  - Commissioner Kryz-Rusoff raised concerns about transient lodging tax shortfalls, the need for conservative budgeting, and careful monitoring of Q1 FY26. Wallace responded that June will close strong, but acknowledged we will have a soft Q1.

Attachment: [Finance Report](#)

## Venue Business Reports

### Portland's Centers for the Arts

Rachael Lembo Executive Director, provided the following updates:

- **Staffing:** A new Director of Operations, Jeff Weinkauff, has been hired. The organizational structure is being changed to move the production team under operations and the setup/custodial team to the events department.
- **Programming:** P5 Presents had 18 performances in FY2025 with a fantastic house net of over \$450,000. Highlights included *Sailor Moon*, Hillary Clinton, and *Riverdance*.
- **Music on Main:** The summer Music on Main series lineup was announced, with performances by Band After Midnight, Conjunto Alegre, Grassroots Movement, and Jujuba.
- **Operations:** The Schnitz roof project is underway and is expected to be completed in early August. The box office is shortening its hours to Wednesday-Friday from noon to 5:00 PM.
  - Commissioner Penilton asked about operational efficiency and staffing levels moving into the fall season. Lembo responded that they are taking some time with the transitions and the restructure will help us become more efficient.

### Oregon Convention Center and Portland Expo Center

Cindy Wallace Executive Director provided the following updates:

- **Staff Tour:** 33 staff members went on a bus tour to learn about Portland's history of housing discrimination, including stops at Vanport and the Expo Center.



- **Personnel:** Staff reductions have been made at both Expo and OCC. Julie Deweese, who was the second person ever hired at the OCC, retired after 38 years.
- **Travel Portland:** Travel Portland closed FY2025 with over 330,000 room nights, the highest production year ever.
- **National Education Association (NEA) Conference:** The OCC is currently hosting the NEA conference, the largest ever in Portland, which is expected to have an economic impact of \$18 million. The event has 7,000 delegates and 1,000 staff/contractors, utilizing 36,000 room nights at 42 hotels.
- **Orbit Marketplace:** The renovated Orbit Marketplace reopened today, featuring house-made pastries, snacks, new beverage options, and AI-powered self-checkout technology.
- **Venue Collaboration Project:** OCC management spent 224 hours on-site at Expo in June to support the transition. The project has identified 304 action items, with 82 completed so far. A joint all-staff meeting and BBQ is scheduled for August 5th.
  - Commissioner Kryz-Rusoff thanked Wallace for the hard work around transitioning to one team
  - Commissioner Penilton shared his excitement at hosting the NEA conference

## Consent Agenda

- **Consideration of the June 4, 2025, MERC Meeting Minutes**  
This item was approved.

Attachment: [Meeting Minutes](#)

## Expo Future Project and Sports Marketing Update

Craig Stroud, GM of Visitor Venues, Cindy Wallace, Executive Director, OCC + Expo provided an update:

- **Expo Future Project:** The final cultural resources background review of the campus has been received and will be shared with relevant parties. Metro has engaged with the Interstate Bridge Replacement project team to draft a memorandum of understanding to address project impacts, such as the loss of parking and changes to Marine Drive, Expo Road, and the TriMet Max platform.
- Staff are developing a three-phase approach to assess the feasibility of decoupling Expo Hall A from Halls B&C. A memo outlining public-private partnership models for the project will be distributed to Metro Council and MERC in the coming weeks.
- **Sports Marketing:** In accordance with Council and MERC resolutions, the Expo Center is pursuing the sports and event market.
- In FY2025, there was a 36% increase in total sports event bookings compared to FY2024.
- Revenue from sports bookings grew by 30%, totaling over \$950,000 from rent, parking, and food/beverage sales.
- The team is actively bidding on future events, including the USA Judo Junior Olympics and Hoop Source basketball.

- Commissioner Kryz-Rusoff noted the exciting list and asked about how conversations with existing clients are going. Wallace responded that they are going well; everyone is concerned with their bottom lines and the clients understand our commitment to Expo and share our desire to see the venue thrive.
- Commissioner Penilton asked if there is concern about losing any of our contracts as we work through transitions. Wallace responded no, they are committed to serving Expo's existing clients while adding additional sporting events.
- Chair Stoudamire-Phillips cited funding set aside for sporting equipment and asked about a potential carve out for historical memorialization work. Stroud responded that the resolutions were specific to sports equipment investment to support an interim pivot, however there is an intent to explore opportunities to advance historical memorialization components of the project.
- Commissioner Malán-González referenced the marketing materials and asked if we will continue to market towards non-sport related events as well. Wallace clarified that the marketing piece shared was specific to the sports market, however the sales team has collaborated to market both Expo and OCC for all types of uses.
- Commissioner Malán-González asked about the Interstate Bridge project impacts to the Expo parking lot. Stroud responded that as their project unfolds, we will accommodate potential changes to the Northeast corner of the campus and incorporate them into our designs as we further Expo development.
- Commissioner Malán-González asked if there be an RFP for historical memorialization project work to engage with a broader group of communities. Stroud cited the resolution language specific to the interim investment for sports equipment and infrastructure. We are still early in the process of development.

Attachments: [Expo Future Update](#)

### **Performing Arts Venue Workgroup Recommendations**

Rachael Lembo, Executive Director, Portland's presented the recommendations from the performing arts venues work group. The report was published last week and shared with the Commission.

- The work group recommends that the City of Portland become the single entity responsible for continuing this work. The current two-government model is not preferred, and they may recommend that the city and Metro prepare a plan for the dissolution of the Intergovernmental Agreement.
- A key recommendation is to address the backlog of deferred maintenance and building modernization upgrades. The work group recommends that capital planning begin immediately.
- The group also made recommendations for immediate improvements, such as increased revenues through expanded bookings, enhanced food/beverage, and updated booking policies.

- The next steps include a work session with Metro Council on July 15th for direction on how to proceed.
  - Commissioner Palm asked about the timeline for transition. Lembo clarified that if we are directed to work on a transition plan the transfer will not happen quickly, as the work group recommends a smooth, thoughtful process. The IGA provides specific timelines for an un-agreed-upon transition, which would be 6 months if initiated by the city and 18 months if initiated by Metro.
  - Commissioner Krys-Rusoff highlighted the need for thoughtful communication with staff and clients around yet another possible transition. Lembo acknowledged the uncertainty this brings to staff and emphasized the importance of communication. She held a listening session with staff to hear their questions and provide updates, reassuring them that nothing is changing immediately and that they are all invested in the work of the buildings.
  - Commissioner Malán-González highlighted recent conversations from the Office of Arts and Culture around upcoming reductions in general operating support. How will this affect planning around the workgroup's recommendations? Lembo acknowledged the broader perspective of the arts ecosystem and noted the workgroup did not delve into that space as the City Administrator would likely make those decisions.
  - Commissioner Oxley added that the workgroup's scope specifically did not include financing or funding but directly focused on venue operations and long-term structural changes for increased venue sustainability.
  - Commissioner Hall commented that the main benefit of the workgroup was developing a shared knowledge base of operation requirements from which to collectively start problem solving.

Attachments: [Performing Arts Venues Workgroup Recommendations](#)

## **Adjourn**

There being no further business, Chair Stoudamire Phillips adjourned the meeting at 1:58 p.m.

- *Minutes submitted by Amy Nelson*

# **METROPOLITAN EXPOSITION RECREATION COMMISSION**

## **Resolution No. 25-06**

For the purpose of increasing income thresholds for Metro's First Opportunity Target Area (FOTA) hiring program.

**WHEREAS**, in 2013, the Metropolitan Exposition Recreation Commission (MERC) directed staff to engage independent consultants to review and update the First Opportunity Target Area (FOTA) program, and;

**WHEREAS**, after conducting thorough program review; historical, legislative and best practices research; and stakeholder engagement, a set of FOTA policy and program recommendations were presented to and accepted by MERC and Metro Council in a joint work session on February 13, 2015, and;

**WHEREAS**, one of such recommendations was for staff to convene a community task force to review and provide to the General Manager of Visitor Venues recommended updates to income eligibility thresholds, and;

**WHEREAS**, MERC appointed a FOTA Task Force in June 2015 that developed recommendations to update the income eligibility thresholds for consideration by the General Manager of Visitor Venues, including a requirement that Metro increase the income eligibility thresholds annually, and;

**WHEREAS**, the income thresholds have not been updated since the initial recommendations in 2015, and;

**WHEREAS**, the Metro Auditor audited the FOTA program in 2025 and recommended that Metro follow the FOTA Task Force recommendations to increase the income thresholds on an annual basis.

**BE IT THEREFORE RESOLVED**, that the Metropolitan Exposition Recreation Commission approves the following updates to the FOTA program income eligibility thresholds, effective upon passage of this Resolution:

1. The income eligibility threshold for households of up to two is increased from \$47,000 to \$81,660;
2. The income eligibility threshold for households of three or greater is increased from \$65,000 to \$104,660;
3. MERC delegates authority to the General Manager of Visitor Venues to update the income thresholds on an annual basis using the University of Washington, Oregon Self-Sufficiency Index for years the index is published and for years that the index is

not published by inflating the then current thresholds using the annualized December Consumer Price Index for West – Size Class A increased by 60% as soon as practicable after publishing of the December inflation factor.

Passed by the Commission on September 3, 2025.

Approved as to form:

\_\_\_\_\_  
Chair

By: \_\_\_\_\_  
Nathan Sykes, Deputy Metro Attorney

\_\_\_\_\_  
Secretary/Treasurer

IN CONSIDERATION OF RESOLUTION NO. 25-06 FOR THE PURPOSE OF  
INCREASING INCOME THRESHOLDS FOR METRO'S FIRST OPPORTUNITY TARGET  
AREA HIRING PROGRAM

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Date: August 26, 2025  
Department: Chief Operating Officer  
Meeting Date: September 3, 2025

Prepared by: Craig Stroud  
Presenter: Craig Stroud,  
General Manager, Visitor Venues  
Length: 10 minutes

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**BACKGROUND AND ANALYSIS**

Metropolitan Exposition and Recreation Commission (MERC) Resolution 25-06 updates the income eligibility thresholds for Metro's First Opportunity Target Area (FOTA) hiring program and adopts a methodology to annually update the thresholds.

MERC appointed a FOTA Task Force in June 2015 that developed recommendations to, among other things, annually update the program's income eligibility thresholds. The Task Force decided to use the University of Washington, Oregon Self-Sufficiency Index (UW Index) to establish and update income eligibility thresholds for two household types: 1) Households up to two<sup>1</sup>, and 2) Households of three or greater<sup>2</sup>.

Current thresholds used by the program have not been updated since the initial amounts adopted by MERC on December 2, 2015, and January 6, 2016. This resolution updates the thresholds for the remainder of calendar year 2025 using the UW Index published in 2024.

The UW Index has historically published on a three-year cycle. This means MERC must decide whether to update the threshold for intervening years and if so, identify an alternative index or adopt an adjustment process. The average annual percentage increase for the UW Index from 2011 to 2024 is 6.6 percent.

Staff engaged Metro's Planning, Development and Research (PDR) department's data and research professionals to identify if alternative self-sufficiency indexes exist. A readily available substitute to the UW Index is not known. PDR staff also analyzed the rate of increase for the UW Index compared to the Consumer Price Index for West – Size Class A (CPI) metropolitan areas from 2014 to 2024. The analysis showed that CPI lags the UW Index. This difference is explained in the 2024 UW Index, "Underestimated Inflation: Using general inflation measures (CPI-West of CPI-U) underestimates the true rise in living costs. In Washington County, the CPI-based estimate shows a 48 percent increase, but actual costs rose by 97 percent, leaving a gap of over \$24,000 annually."

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<sup>1</sup> University of Washington, Oregon Self-Sufficiency Index, Multnomah County, One Adult and One Preschooler

<sup>2</sup> IBID, One Adult, One Preschooler, and One School-age

Based on an analysis from 2014 to 2024, a reasonable estimate of the UW Index can be calculated by using the most recent UW Index report thresholds and increasing those amounts annually for each intervening year using the annualized December Consumer Price Index for West – Size Class A increased by 60%. This increase estimates the ‘underestimated inflation’ described previously.

### **FISCAL IMPACT**

The administrative efforts and cost to calculate and update program income thresholds annually are expected to be minimal using the method described above.

Updated income eligibility thresholds increase the number of individuals residing within the FOTA program’s geographic boundaries that will qualify for first opportunity job applications at the MERC venues. Those amounts do not change employee job classifications or associated pay ranges for wages.

### **POLICY QUESTION(S)**

- 1) Does MERC accept updating the FOTA program income eligibility thresholds annually?
- 2) Does MERC accept the recommended methodology to update the annual income eligibility threshold using CPI increased by an escalator for years in which the University of Washington, Oregon Self-Sufficiency Index is not published?

### **POLICY OPTIONS FOR MERC TO CONSIDER**

- Accept or reject one or both of the staff recommendations.
- Direct staff to conduct additional research to update FOTA income thresholds.

### **STAFF RECOMMENDATIONS**

Staff recommend that MERC adopt Resolution 25-06.

The resolution increases the income eligibility threshold for the remainder of calendar year 2025 for households of up to two to \$81,660 and three or greater to \$104,660.

The resolution also provides a method to increase income thresholds for years that the UW Index is not published using the December year-to-date Consumer Price Index for West – Size Class A inflation factor increased by 60%. The income thresholds will be updated as soon as practicable after the publishing of the December inflation factor.

### **ATTACHMENTS**

- A. FOTA Audit Report





# First Opportunity Target Area:

Clarify the program's purpose to improve governance and administration

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April 2025

A Report by the Office of the Auditor

**Brian Evans**

*Metro Auditor*

**Angela Owens**

*Principal Management Auditor*

**Gabby Poccia**

*Hatfield Resident Fellow*

### **Metro Accountability Hotline**

The Metro Accountability Hotline gives employees and citizens an avenue to report misconduct, waste or misuse of resources in any Metro or Metro Exposition Recreation Commission (MERC) facility or department.

The Hotline is administered by the Metro Auditor's Office. All reports are taken seriously and responded to in a timely manner. The auditor contracts with a hotline vendor, EthicsPoint, to provide and maintain the reporting system. Your report will serve the public interest and assist Metro in meeting high standards of public accountability.

*To make a report, choose either of the following methods:*

**Dial 888-299-5460 (toll free in the U.S. and Canada)**  
**File an online report at [www.metroaccountability.org](http://www.metroaccountability.org)**



**Brian Evans**  
**Metro Auditor**  
600 NE Grand Ave  
Portland, OR 97232-2736  
TEL 503 797 1892

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## MEMORANDUM

April 9, 2025

To: Lynn Peterson, Council President  
Ashton Simpson, Councilor, District 1  
Christine Lewis, Councilor, District 2  
Gerritt Rosenthal, Councilor, District 3  
Juan Carlos Gonzalez, Councilor, District 4  
Mary Nolan, Councilor, District 5  
Duncan Hwang, Councilor, District 6

From: Brian Evans, Metro Auditor

**Re: Audit of First Opportunity Target Area Program**

This report covers the audit of the First Opportunity Target Area (FOTA) program. FOTA began in 1989 to give eligible job applicants the first opportunity to apply for positions at the Oregon Convention Center. Positions at Portland's Centers for the Arts, and Portland Expo Center were later added. The purpose of the audit was to evaluate how administration of FOTA impacted program performance.

The audit found administration of FOTA was not aligned with the Metropolitan Exposition Recreation Commission's (MERC) 2015 policy guidance and intended program outcomes were unclear. MERC required annual updates to the program's income requirements and reviews of the zip code boundary every five years. FOTA requirements had not been updated for nearly ten years.

Program performance data and reporting were unreliable. We did not locate reports about Metro's implementation in recent years and contractor reports did not appear to be based on program requirements. We evaluated the program using different interpretation of intended outcomes and found FOTA provided limited economic opportunities. The audit also found weak relationships with community-based organizations (CBOs), which indicated additional efforts were needed to engage successfully.

We have discussed our findings and recommendations with Marissa Madrigal, COO; Craig Stroud, General Manager of Visitor Venues; Holly Calhoun, Deputy COO; Julio Garcia, Human Resources Director; Sebrina Owens-Wilson, DEI Director, and Kara Hill, Talent Acquisition Manager. I would like to acknowledge and thank all the people who assisted us in completing this audit.

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## Summary

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The First Opportunity Target Area program (FOTA) began in 1989 after Metro received state funding to develop and operate the Oregon Convention Center (OCC). FOTA was designed to give eligible job applicants the first opportunity to apply for a position at the OCC. Positions at Portland's Centers for the Arts, and Portland Expo Center were later added to the program. Eligibility was based on household income and zip code.

The purpose of this audit was to evaluate how administration of FOTA impacted program performance. We found that FOTA was more of a step in Metro's recruitment process than a program. Management of FOTA was not aligned with the Metropolitan Exposition Recreation Commission's (MERC) 2015 policy guidance, and FOTA's intended outcomes were unclear.

FOTA's program requirements were not updated as required. MERC required annual updates to the income thresholds and reviews of the zip code boundary every five years. The program's requirements had not been updated for nearly ten years. As a result, fewer people were eligible.

The audit also found that FOTA performance data and reporting were unreliable. We did not locate any reports about Metro's implementation of FOTA in recent years. Two of MERC's contractors reported on FOTA regularly, but their reports did not appear to be based on the program's requirements. Without regular reporting and reliable data, decision makers cannot know if a program is effective.

We evaluated the program using different interpretations of desired outcomes, and found FOTA provided limited economic opportunities. Over the last five years, the program had a limited impact on the number of people hired. The number of positions filled through the program have also declined over time. Most positions filled were part-time and event-based work. This reduced the earning potential and benefits for employees.

Lastly, the audit found that weak relationships with community-based organizations (CBOs) limited FOTA's recruitment. Relationships were focused on a weekly job opportunity email sent to CBOs. The contact list for the email contained some out-of-date information. Our interviews with CBOs indicated additional efforts were needed for Metro to engage successfully.

The audit included six recommendations. Five were designed to clarify MERC's policy direction and improve program administration. The last recommendation was made to ensure alignment between FOTA and other workforce diversity efforts.

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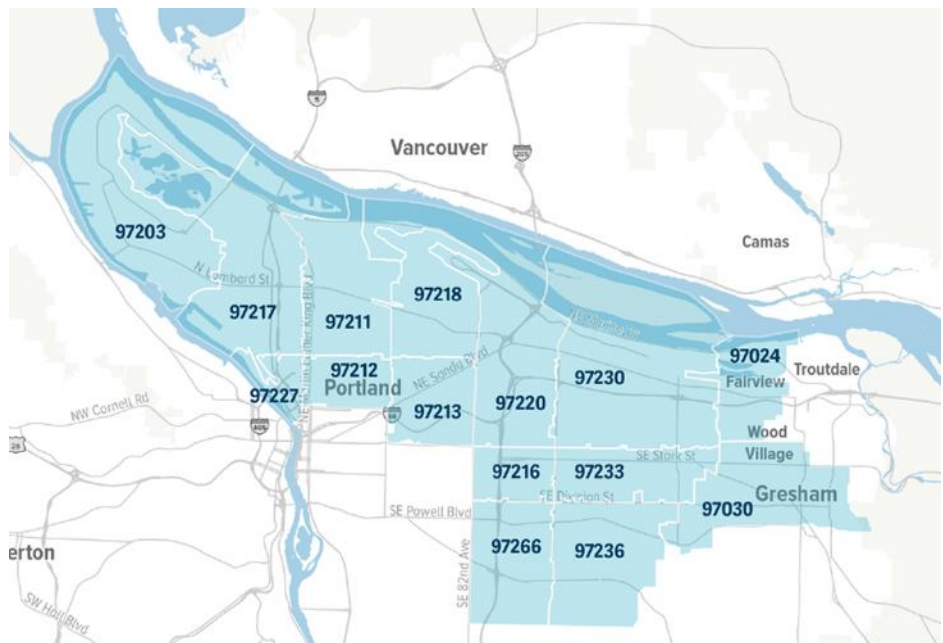
## Background

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Metro's First Opportunity Target Area program (FOTA) was designed to give eligible job applicants the first opportunity to apply for positions at the Oregon Convention Center (OCC). Positions at Portland's Centers for the Arts (Portland's), and Portland Expo Center (Expo) were later added to the program. To be eligible for FOTA, applicants must:

- Have a household income less than \$47,000 for a household of one or two OR \$65,000 for a household of three or more.
- Live in one of 15 zip codes.

### **Exhibit 1    The First Opportunity Target Area includes 15 zip codes in Multnomah County**



*Source: Metropolitan Exposition Recreation Commission Resolution 15-22a, January 6, 2016; Metro Website.*

FOTA began in 1989 after Metro received state funding to develop and operate the OCC. The state required Metro, directly and through its partners, to pursue a policy of providing a first opportunity to jobs to economically disadvantaged residents living in economically-distressed neighborhoods near the OCC.

The OCC was built in and near neighborhoods that had a history of displacement because of government-sponsored construction projects. These projects led to the demolition of businesses, churches, and homes during the 1950's through 1970's. Communities of color were especially impacted by the displacement because racist housing policies restricted where they could live.

Initially, people who were unemployed or had income below the target area's median income were eligible to apply. They also needed to live in the immediate vicinity of the OCC. The target area boundary:

- Columbia Boulevard at the north end.
- 42<sup>nd</sup> Avenue at the east end.
- I-84 at the south end.
- Willamette River at the west end.

FOTA's requirements have changed over time. Portland's and Expo positions were added to the program. In 2003 and 2015, the income thresholds increased. The target area boundary expanded in 2015 to include its current zip codes.

The program initially sought to provide preference to contractors that hired employees who met the income thresholds and lived in the target area. The program also initially encouraged advertising contracting and purchasing opportunities to businesses in the target area. FOTA-specific contracting requirements were formalized in contracting and purchasing rules. They were later removed and replaced with agencywide contracting efforts related to state certified, woman-owned, minority-owned, and emerging small businesses.

Several parties across Metro were involved in administering FOTA. Metro's Human Resources (HR) department supported the recruitment process. The General Manager of Visitor Venues administered policies and procedures at OCC, Portland's, and Expo. The Metropolitan Exposition Recreation Commission (MERC) provided venue oversight and advised Metro Council on the adoption of venue policies, goals, and objectives. MERC approved updated FOTA requirements in 2015.

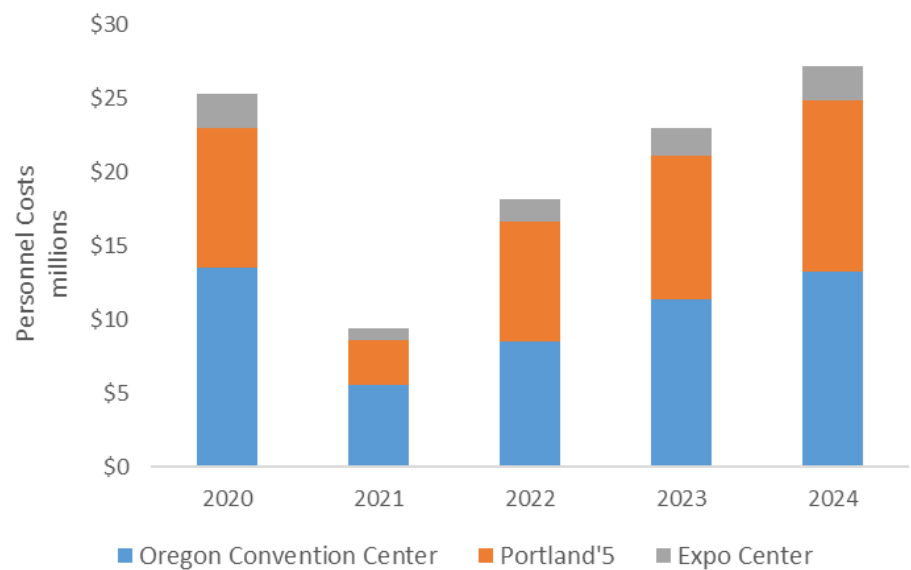
Metro policy required posting job opportunities for FOTA-eligible applicants before posting them for the general public. Qualified applicants were required to be considered first for open positions. If they were selected to interview, Metro was required to interview them first and make a hiring decision before opening the position to the general public.

Metro maintained public-facing websites for job opportunities. One was specifically for applicants who met FOTA requirements. Another was for general recruitments. Job opportunities were also forwarded to a contact list of community-based-organizations (CBOs).

HR reviewed applications to make sure applicants self-certified that they met the income and geographic requirements. Hiring managers across the venues were responsible for beginning the recruitment process and interviewing applicants. Metro used a recruiting software program, to manage and document recruitments.

FOTA requirements applied to all venue positions. The venues filled 501 positions over the last five fiscal years. Between FY 2019-20 and FY 2023-24, Metro spent about \$20 million per year on venue personnel costs, including wages and benefits.

**Exhibit 2 Metro spent between \$9.4 million and \$27.2 million per year on visitor venue personnel costs in the last five fiscal years**



Source: Auditor's office analysis of personnel costs in PeopleSoft. Costs adjusted for inflation.

Metro also contracted for some parts of venue operations. One contractor provided food and beverage services. Another promoted tourism in the region. These contractors were required to report FOTA information related to their total hires. The food and beverage contractor indicated they hired 553 total positions in the last three fiscal years. The tourism marketing contractor employed a total of 74 employees as of November 2024, so likely hired fewer employees during the same period.



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## Results

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The audit found FOTA was more of a step in Metro's recruitment process than a program. Management of FOTA was not aligned with MERC's 2015 policy guidance, and its intended outcomes were not clear. Without clarity and oversight, Metro could not maintain an effective program. A 2015 evaluation found there was agreement about why the program began, but little consensus about what it was supposed to achieve. This weakness was evident in our review of the program's current administration.

The 2015 program evaluation reported that FOTA suffered from a lack of high-level leadership and operational ownership. This audit found the lack of effective governance still existed. As a result:

- Program requirements were not updated as required.
- Performance data and reporting were ineffective.
- Economic opportunities through FOTA were limited.
- Weak relationships with community-based organizations limited program recruitment.

Metro documents, contractors, employees, and agency leadership characterized the program's intended outcomes in different ways. Some viewed FOTA as a way to address displacement caused by the development of the OCC. Some believed the program was intended to increase workforce diversity. The program was also characterized as providing workforce development and career advancement. Several people emphasized the contributions of contractors instead of Metro.

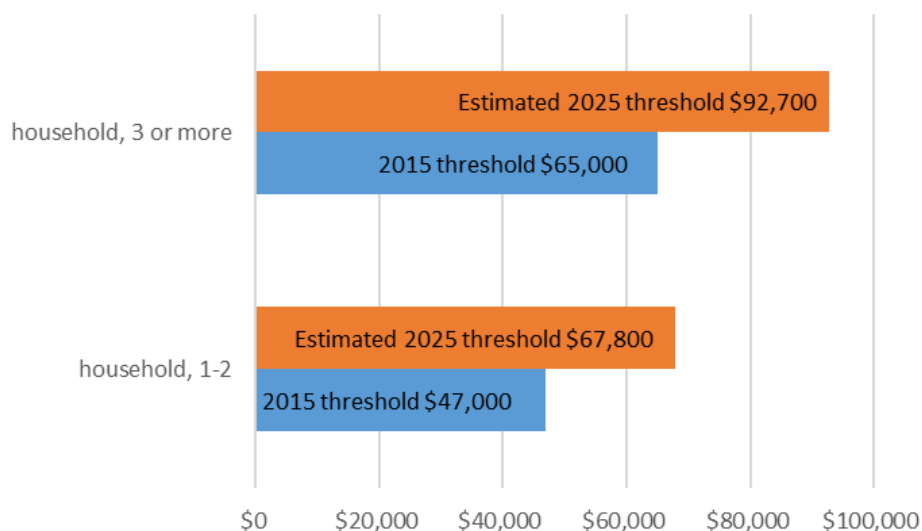
The relationship between FOTA and other diversity and equity goals was unclear. This weakness was also identified in the 2015 evaluation. In 2016, Metro published its Strategic Plan to Advance Racial Equity. The strategic plan made a connection between FOTA and agencywide workforce diversity goals, but how FOTA's current administration aligned with those goals was unclear.

### Program requirements were not updated as required

The audit found that FOTA criteria were not updated as required. As a result, fewer people were eligible. A 2015 MERC resolution required annual updates to the income thresholds. It also required MERC to review the target-area boundary every five years and update as necessary. The last review and update took place in 2015. This means the program's requirements have not been updated for nearly ten years.

Income thresholds were supposed to be updated based on the University of Washington Self-Sufficiency Index (index). The index was intended to measure how much income was needed to meet basic needs without public or private assistance. We estimated the 2025 income thresholds would have been about \$67,800 for a household up to two. This estimate suggests an increase of about \$20,000 from the current threshold. For a household of three or more people, we estimated the income threshold would have been about \$92,700, or about \$27,800 more than the current threshold.

### Exhibit 3    Updating income thresholds would make more people eligible for FOTA



*Source: Auditor's Office estimate of 2025 FOTA income thresholds based on University of Washington Self-Sufficiency Indices for 2014, 2017, 2021 and Metro website as of 8/15/24.*

Updating the income thresholds as specified in the 2015 MERC resolution could have increased FOTA eligibility for households in the current zip codes. The exact number was unclear because of how household income was reported in Census data, but we estimated it would likely be in the thousands.

The FOTA boundary was also supposed to be reviewed regularly to ensure it remained relevant in reaching its intended population. Because the target area has not been updated since 2015, the current boundary may not be aligned with the program's intent. The boundaries were updated in 2015 out of concerns for gentrification. Since then, in 2018, the City of Portland published a draft gentrification and displacement report showing several FOTA zip codes were experiencing, or at risk of experiencing, additional gentrification.

We identified two causes that appeared to be barriers to implementing the income and FOTA boundary updates. The first was the lack of clear roles and responsibilities. MERC was identified as being responsible for income and boundary updates. However, MERC is a volunteer commission with limited staff to complete the work. In practice, the General Manager of Visitor Venues and HR appeared to be most closely aligned with FOTA administration.

While those parts of Metro may have capacity to update income thresholds, reviewing the FOTA boundary could require a significant amount of work. The last boundary changes were created using a consultant, a cross-agency workgroup, a stakeholder task force, and sophisticated data analysis. If that

## Performance data and reporting were ineffective

same approach were used again it would require dedicated resources, additional capacity, and clarity about roles and responsibilities.

The second barrier to implementing the updates was that the index for updating income thresholds in the 2015 MERC resolution was published every three to four years. As a result, it could not be used to update income thresholds annually. A different index would be needed to update income annually.

The audit found FOTA performance data and reporting were unreliable and could not be used to effectively evaluate the program. Without regular reporting and reliable data to understand program performance, decision-makers cannot know if a program is effective. We did not locate any internal or external reports about Metro's implementation of FOTA in recent years. Two of MERC's contractors reported on FOTA regularly, but their reports were inconsistent with each other, and did not appear to be based on the program's requirements.

Regular reporting about Metro's performance was not taking place. MERC meeting packets and minutes over the past ten years indicated that Metro rarely provided reports that included FOTA application and hiring data. In general, FOTA data was shared when the program was being formally evaluated in 2003 and 2015.

During the audit, HR provided FOTA performance data for fiscal year (FY) 2022-23 and FY 2023-24. HR also provided a report and data from 2016 that included two quarters of application and hiring information. This indicated program data was available, but it was not being reported at MERC meetings.

The level of detail varied across the reports we received. For instance, one contained the race and ethnicity of those hired through FOTA, internal, and general recruitments. If the intent of FOTA is to increase workforce diversity, then this information could help decision-makers understand which recruitment strategies contribute to Metro's workforce diversity goals. Another report summarized only FOTA recruitment information. It excluded race and ethnicity details but tracked applicants at each stage of the recruitment process. This information could help identify potential barriers for FOTA applicants during recruitment.

There were examples of incomplete and inaccurate data in the reports we reviewed. We noted inconsistencies between data in the recruitment software and PeopleSoft HR. For instance, some employees were identified as being hired through a FOTA recruitment process in one source, but not the other. It was also unclear how existing employees who were hired through a FOTA recruitment process would be reported in the data if they were later hired in another position using a non-FOTA recruitment process.

Contractors reported data about FOTA at MERC meetings, but it was not aligned with FOTA requirements. The basis of FOTA is that applicants meet two requirements to receive a first opportunity to apply and interview for a position. Currently, neither contractor requires that an applicant lives in the target area or meets income requirements. One of the contractors does not offer a first opportunity to interview. The other contractor only offers a first opportunity to interview for manager positions.

The contractors were required to report FOTA compliance. Their reports focus on the zip codes where employees live. This may be in part due to unclear language in their contracts. One contract defines FOTA as applying only to the geographic boundary while the other contract gives no definition of FOTA at all.

Clarifying the program's reporting requirements would improve the quality of data available to assess performance. Reporting timelines were clear in both contracts and both contractors reported on time. This points to a lack of clarity about the program's income requirements as the cause for inconsistent program reporting. The General Manager of Visitor Venues was identified in one contract as being responsible for defining reporting requirements.

Program performance information was also inconsistent between the two contractors. One contractor reported its purchases from businesses in the target area, but contracting was no longer part of the program. Misalignment between what contractors reported and FOTA's requirements could cause confusion among stakeholders about the program's performance.

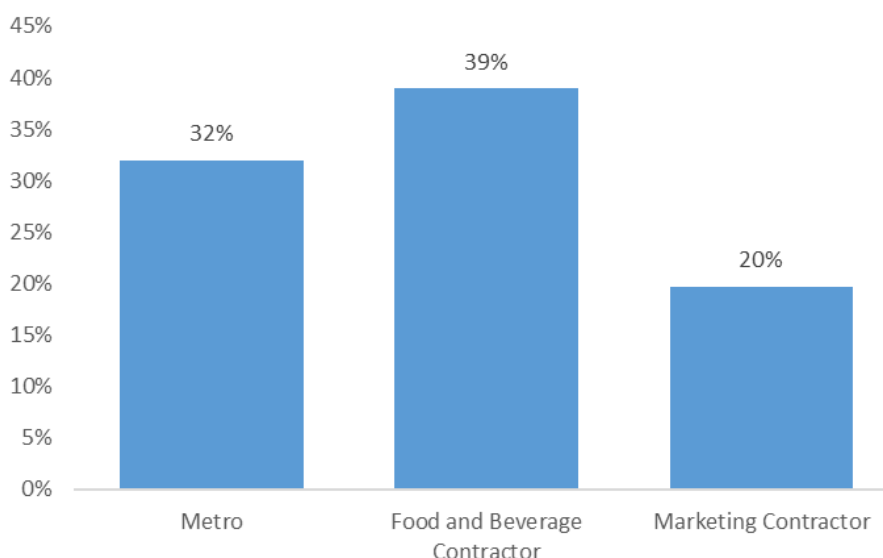
Reporting was ineffective in part because it was unclear what the program was supposed to accomplish. If the purpose of the program were to provide the first opportunity to apply for a job, then data about the number of applicants and number of people hired would be needed. If the desired outcome were to provide economic benefits to economically disadvantaged people, then tracking income growth might make sense. Some of those data points were available for Metro positions, but they would need to be gathered for contractor positions.

Based on Metro's data, about 4% (22 of 501) of venue hires were made through a FOTA recruitment in the last five fiscal years. This data did not include contractor hires. Metro employees hired through a FOTA recruitment attested that they met the income threshold for their household size and lived in the target area. HR did not verify this information.

If the purpose of FOTA is to employ people in the target area generally, then Metro's reporting would need to focus on the number of venue employees living in target area zip codes. In that scenario, Metro's reports would be like the current reports contractors make to MERC.

HR data showed about 32% of Metro’s venue employees lived in the FOTA boundary near the end of FY 2023-24. That was about the same percentage prior to COVID (37%). The two contractors reported 39% and 20% of their employees lived in the target area in 2024.

**Exhibit 4    The percentage of employees living in the target area varied among Metro and its contractors**



*Source: Auditor’s Office analysis of PeopleSoft HR data for 6/23/24; Marketing Contractor 3<sup>rd</sup> Quarter 2023-24 report; Food and Beverage Contractor employee data as of 12/2/24.*

If the purpose of the program were to increase workforce diversity, then performance reports would need to include demographic data. Metro and the two contractors reported information about workforce diversity. However, that information was not connected to the program. For instance, Metro’s website included a dashboard showing the race and ethnicity of all employees as well as the race and ethnicity of venue employees. It did not track demographic data of employees hired through FOTA recruitments.

FOTA was also characterized by some as focusing on providing career opportunities. If that were the program’s purpose, then performance could be assessed based on the career path of employees. In that case, data about part-time and full-time positions, starting and ending pay, job duration, and promotions would be helpful.

**Economic opportunities through FOTA were limited**

The audit found economic opportunity was not defined. This mattered because the program sought to provide economic opportunities for economically disadvantaged residents. A lack of specific desired outcomes can lead to different interpretations of what creates a program benefit. We evaluated the program using different interpretations of desired outcomes and found FOTA provided limited economic opportunities for economically disadvantaged applicants.

Over the last five fiscal years, FOTA had a limited impact on the number of people hired by Metro at the venues (4%). In addition, the number of positions filled through FOTA recruitments has been declining. In FY 2019-20, the venues hired 13 employees through FOTA recruitments out of 111 total job opportunities (12%). In FY 2023-24 three employees were hired through FOTA out of the 120 job opportunities (2.5%).

Contractors appeared to have more success hiring from the target areas. For instance, 218 of one contractor's employees hired over the last three years lived in the target area. This represented about 40% of the positions that contractors filled during that time. However, those positions were not filled using Metro's FOTA requirements.

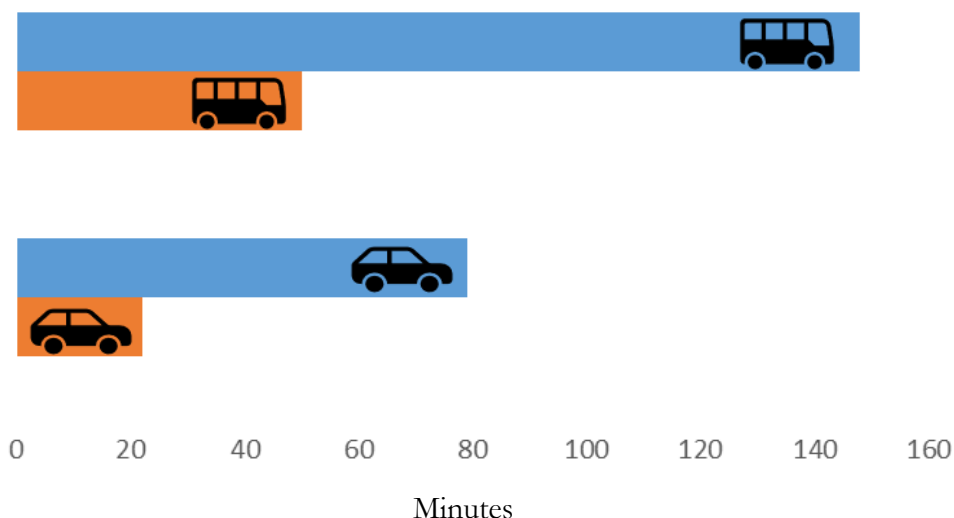
Most FOTA opportunities were limited to part-time and event-based jobs. About 73% of Metro positions filled through FOTA recruitments were part-time, event-based positions. Contractors also hired mostly part-time and event-based positions. In the last five fiscal years, 76% of the people who lived in the target area that were hired by contractors were part-time employees. This was likely the result of the event-based nature of venue positions. However, it reduced the earning potential and benefits for employees in these positions.

The trade-offs between full- and part-time employment should be considered in program planning. Part-time and event-based work may be attractive to people seeking flexibility or those wanting to develop job skills. Some applicants meeting the program's income requirements may qualify to receive income-based financial support. Examples include assistance for paying utility bills or purchasing food. A full-time position could raise their income high enough to make them ineligible for these services.

In some cases, a reduced work schedule may create additional burden that could make the job less desirable. For instance, traveling to and from work for a part-time or event shift may not make sense for some applicants. As the target area boundaries expanded, travel time to get to the venues may have increased.

We compared travel time from six zip codes in the target area to the three venues. The analysis showed target areas added in 2015 increased average round-trip travel time for one of the selected zip codes up to 79 minutes by car and up to 149 minutes by public transportation.

**Exhibit 5** Employees living in the **updated target areas** could travel more than employees living in the **original target areas**



*Source: Auditor's Office analysis based on a selection of schools in FOTA zip codes, TriMet.org, and Google.com/maps.*

Because most positions were event-based, employee benefits were reduced. Some, but not all, part-time employees at Metro were eligible for health benefits. Part-time employees paid more for the benefits. According to Metro's employee benefits handbook, event-based employees were not eligible for Metro's health benefits. They also had less access to some other insurance benefits.

Several employees hired through FOTA recruitments took on additional jobs across the venues. This had the potential to increase their weekly hours. While this type of variety may be attractive to some applicants, others may find the inconsistency and need to travel among the venues unattractive.

Some FOTA opportunities had limited potential for future wage growth. This could matter if the desired program outcome is to provide opportunities for career advancement. At least 27% of the jobs filled at the venues in the past five years paid a fixed hourly wage regardless of experience.

We also heard concerns that FOTA opportunities were low-wage positions. We reviewed the starting wage for employees that Metro's PeopleSoft HR system identified as being hired through a FOTA recruitment. After adjusting for inflation, the average starting wage was about \$22 per hour. This was higher than the regional minimum wage of about \$16 per hour. It was also higher than our current estimate of the index which was about \$19 per hour for a single adult.



## Weak relationships with community- based organizations limited program recruitment

Contractors' employees who lived in target area zip codes had varying pay ranges. After adjusting for inflation, the marketing contractor's average hourly pay was about \$41. The food and beverage contractor's average hourly pay was about \$20.

We found that Metro's engagement with CBOs was inconsistent and inadequate to recruit FOTA participants. These relationships were meant to help match potential applicants with job opportunities. Relationships were inadequate due to several factors including differing or unclear expectations, a lack of personal connections between CBO employees and Metro employees, and changes to previous relationship-building practices.

The audit found current relationships between Metro and CBOs were primarily focused on a weekly job opportunity email that was sent to the CBOs. However, the contact list contained some out-of-date information. We attempted to contact organizations on the list that had been identified as high priority partners for FOTA. We also tried to contact CBOs on the list that were based in a FOTA zip code. While most of these contacts were up to date, many did not respond to our inquiries, some were no longer valid, and one of the contacts was not involved in job placement work. We found that one CBO was not receiving emails, two were receiving emails sporadically, and several listed email addresses were no longer in use.

We interviewed seven CBOs from the list of twenty-five. Several mentioned having established relationships with Metro through job fairs. However, two contacts directly involved in connecting clients to job opportunities reported that Metro's past outreach practices had stopped. Those practices included Metro employees visiting CBO offices, speaking with staff and clients to establish expectations, and communicating a clear mission for FOTA.

Several CBOs mentioned that they work directly with the organizations where their clients applied. A barrier in their efforts to recruit FOTA participants was not knowing who to contact at Metro about hiring. These employment specialists often rely on their relationships and networks to support their clients. Some felt that having a person to talk to about available jobs and expectations of positions would be helpful. Relationships may have lapsed in part because of COVID shutdowns and remote work. These findings indicated additional efforts were needed to engage successfully with CBOs.

Effective partnerships also appeared to be more challenging due to unclear responsibility for managing FOTA. There did not seem to be a process in place to keep the email contact list up to date. This was important because it acts as a key piece of communication between Metro and CBOs. Some CBOs we spoke with had positive feelings about Metro and receiving the weekly emails. Several did work with low-income populations who live in the target area, making them good partners for the program.

Past FOTA program evaluations make clear that CBO connections were an important part of success. The 2003 evaluation made recommendations to expand outreach in the communities of North and Northeast Portland. They noted local businesses, community groups, and churches have a natural ability to connect people to opportunities.

The 2015 program evaluation recommended using data-driven approaches to support outreach. Two-way communication would be necessary to ensure accurate information was used by program management. CBOs need to know about the program and its requirements. Metro needs to know which groups and partnerships work best for finding eligible applicants.

Two CBOs mentioned that jobs offered at Metro are desirable and one career specialist noted that their clients may be underqualified for positions. Barriers may exist for clients such as a lack of skills to meet the job's minimum qualifications. Although some of the CBOs we talked to offered training programs, it did not appear to be directly aimed at building qualifications for FOTA positions. This may result in fewer applicants connecting to FOTA opportunities. Stronger relationships between Metro and CBOs could help reduce some of those barriers by providing training for CBO staff and trainings at CBOs for potential applicants

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## Recommendations

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To clarify the FOTA policy direction in Resolution 2015-22a, Metropolitan Exposition Recreation Commission and the General Manager of Visitor Venues should:

1. Change the criteria used to annually update the program's income thresholds.
2. Create a process to determine whether the program's geographic boundary will be updated every five years.

To improve program administration, the General Manager of Visitor Venues in consultation with Human Resources, should:

3. Establish consistent performance reporting standards for contractors and internal operations.
4. Publish performance reports periodically to inform the public, policy makers, and management about FOTA's outcomes.
5. Strengthen relationships with community-based organizations to connect community members with job opportunities.

To ensure alignment between FOTA and other workforce diversity efforts, the General Manager of Visitor Venues in consultation with Human Resources, and Diversity Equity and Inclusion should:

6. Update FOTA to align with any changes to SPARED I or other workforce diversity goals and strategies.

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## Scope and methodology

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The purpose of this audit was to evaluate how administration of the First Opportunity Target Area (FOTA) impacted program performance. Our objectives were to:

- Determine the status of the 2015 FOTA program review recommendations.
- Determine if differences in how Metro and partners administer FOTA impacted program performance.
- Identify opportunities to increase program performance.

The scope of analysis included Metro and contractor FOTA reporting from fiscal year (FY) 2019-20 through FY 2023-24 and employees hired by Metro through FOTA beginning in 2016. To develop our audit objectives, we reviewed prior Metropolitan Exposition Recreation Commission (MERC) meeting minutes, recruitment for MERC applicants, and partner contracts and agreements. We consulted best practices from NeoGov, the Government Accountability Office, and the Government Alliance on Race and Equity. We also reviewed Metro resolutions and FOTA evaluations dating back to 1989.

We interviewed Metro staff and leadership as well as MERC commissioners to familiarize ourselves with the history, objectives, and implementation of FOTA. We conducted preliminary analyses of program data retrieved from Metro's recruiting software program and PeopleSoft HR.

To complete our audit objectives, we reviewed FOTA program requirements outlined in MERC Resolution 2015-22a and determined if the program was up to date. We conducted interviews with a judgmental sample of seven community-based organizations (CBOs). We used a judgmental sample to identify the most relevant partners on Metro's email list. As a result, findings cannot be generalized to the population as a whole. The sample population was based on having a zip code in the FOTA boundary or being identified by Metro as being a high priority organization in prior MERC FOTA discussions.

We evaluated data from Metro's recruiting software to identify MERC venue hires made through FOTA, internal, and general recruitment between FY 2019-20 and FY 2023-24. We used Metro's classification and compensation website as of 10/24/2024 to determine the compensation range for venue hires. We also reviewed PeopleSoft HR data to identify starting hourly wages for people documented as being hired through FOTA recruitments. We adjusted hourly wages to 2024 values. Due to the incomplete nature of this data set, audit findings cannot be generalized to the population as a whole.

We interviewed two of Metro's contractors, Levy and Travel Portland, to better understand how they administered and reported on Metro's FOTA program. We obtained and analyzed hiring data from these contractors to understand how their efforts impacted program performance.

In October 2024, we notified management about an error in the way FOTA opportunities were listed in Metro's weekly job opportunities email. Management stated that they implemented corrective actions later that month in response.

We conducted this performance audit in accordance with generally accepted government auditing standards. Those standards require that we plan and perform the audit to obtain sufficient, appropriate evidence to provide a reasonable basis for our findings and conclusions based on our audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives. This audit was included in the FY 2024-25 audit schedule.

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# Management response

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## Memo



Date: April 4, 2025  
To: Brian Evans, Metro Auditor  
From: Marissa Madrigal, Chief Operating Officer  
Craig Stroud, General Manager of Visitor Venues  
Holly Calhoun, Deputy Chief Operating Officer  
Subject: First Opportunity Target Area Audit-Management Response

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### Introduction

Auditor Evans,

Thank you for the thoughtful review of the First Opportunity Target Area (FOTA) program and the recommendations for improving administration of the current program and incorporating previous findings and commitments ("First Opportunity Target Area Program Study" February 2015, and "MERC Resolution 15-22a" January 2016).

FOTA was implemented 36 years ago as a *"first opportunity for available jobs to economically disadvantaged residents living in economically distressed neighborhoods in the immediate vicinity of the Convention Center site."* At its core, this program was an attempt to acknowledge discriminatory practices and displacement that had disproportionately impacted communities of color, most significantly the African American community.

As the audit points out, the actual economic advancements or reconciliation of historical injustices that can be tied to the program are less notable. While there may be a range of reasons *why* this is the case, the lack of reliable data and unclear roles and responsibilities must first be addressed. Reliable program data will be critical when providing program performance outcomes to key stakeholders, including policy decision-makers. Changes to this program, including clarifying scope and desired outcomes, will be equally reliant on solid baseline data and qualitative feedback.

Management's responses to the audit recommendations focus on stabilizing the program by fulfilling the requirements outlined in MERC Resolution 15-22a. Immediate actions include clarifying roles and responsibilities, updating income thresholds, improving data collection and reporting, and deepening relationships with Community-Based Organizations. Assessing outcomes after stabilizing the program will allow the public, policy makers, and management to identify if changes are desired. Please note in our overall timeline that stakeholder engagement, including engaging with policy makers about programmatic changes, is not proposed until after a program stabilization period.

As communities across the nation experience backlash against social justice programs, it's more important than ever that Metro keeps its commitments and stands by its values, particularly those related to diversity, equity and inclusion. That doesn't always look like bold moves and loud actions.

Sometimes it just means doing what we said we would, following through, and fulfilling commitments made.

And in the case of the FOTA program, that's what we intend to do. While there's a compelling case to be made that the program isn't fulfilling the commitments it originally sought to, this position minimizes the commitments management made and didn't adequately keep 10 years ago. By starting with a focus on rightsizing programmatic needs and resources instead of focusing on why the program should be changed, we can more effectively equip policy makers with the necessary data to meaningfully explore FOTAs purpose, outcomes and responsiveness to the cultural and economic disparities which the program originally sought to address.

## **Audit Recommendations** - updated March 19th

### **Recommendation**

To clarify the FOTA policy direction in Resolution 2015-22a, MERC and the General Manager of Visitor Venues should:

#### **1. Change the criteria used to annually update the program's income thresholds.**

**Management Response:** Management agrees with the recommendation. As noted by the audit, the University of Washington (UW) Self-Sufficiency Index, identified in Resolution 2015-22a was published about every three years. Given the resolution's requirement to update the income thresholds annually, either a new index or revised approach must be identified to support annual changes.

The UW Self-Sufficiency Index published an Oregon 2024 index. To expedite an income threshold adjustment that will immediately increase the number of applicants residing in the existing FOTA boundary that qualify for the program's first opportunity, the General Manager of Visitor Venues will bring forth to MERC a resolution to update the income thresholds using the Oregon 2024 index no later than August 2025.

Adjusting the income thresholds for years that fall between updates to the UW Self-Sufficiency Index will require additional research and direction from MERC.

**Proposed Plan:** The General Manager of Visitor Venues will work with Metro's Planning, Development and Research department's data and research professionals to identify alternative self-sufficiency indexes which provide similar income and self-sufficiency data. Should no reliable replacement indexes exist, the General Manager of Visitor Venues will identify an annual inflation adjustment process that can be applied to the UW Self-Sufficiency Index to allow annual adjustments.

**Timeline:** Either a new index or an annual inflation adjustment process will be provided to MERC for consideration no later than January 2026.

#### **2. Create a process to determine whether the program's geographic boundary will be updated every five years.**

**Management Response:** Management agrees with this recommendation. In addition to this recommendation, the audit's other recommendations include updating program income thresholds, improving data and reporting, and reestablishing CBO partnerships. Management believes it is important to stabilize the program by implementing those recommendations and establishing



two years of program performance data before attempting to assess whether the program's boundaries require change.

The previous time the geographic boundaries were updated (2015), significant resources were dedicated to the process including a consultant, a cross-agency workgroup, a stakeholder task force, and sophisticated data analysis. Additionally, as the audit noted, the last boundary change created unintended barriers, like significant increases in commute times, particularly when using public transportation.

Because the need for a boundary change necessitates such a commitment, resources, and agency capacity, it is important that decisions are influenced by accurate data analysis to help determine if a boundary change is critical to the program's success. Two years of performance data will likely provide MERC the information necessary to determine if a change should be considered and we expect to bring this question to MERC in late 2027 or early 2028.

***Proposed Plan:*** Management commits to the following actions to stabilize the program prior to reassessing the programs geographic boundaries:

***Income Thresholds:*** Management will recommend MERC update program income thresholds using a 2024 UW Self-Sufficiency Index report for Oregon by August 2025. In addition, the General Manager of Visitor Venues will recommend either a new income threshold index or an annual inflation adjustment process for future annual updates for MERCs consideration and approval by January 2026. More information on this is provided in response to recommendation one.

***Reporting:*** Clearly establishing reporting requirements for Metro's Human Resources processes and MERC contractor processes will support consistent reporting and improve accountability and data integrity. Management commits to updating reporting requirements by August 2025 but notes that the timeline may be extended if the updated requirements necessitate any system updates to effectively capture and report performance data. More information on this is provided in response to recommendation three.

***CBO Partnerships:*** Management appreciates the audit report's language around CBOs and their importance to program success. Deepening existing and establishing new relationships with CBO's that support job placements, ensuring the relevant CBOs know about the FOTA mission, requirements, expectations, and opportunities, and defining specific roles and responsibilities so that the CBOs know who to contact about hiring are important actions. More information on this is provided in response to recommendation five.

***Timeline:*** We anticipate bringing the question of updating the geographic boundaries to MERC in late 2027 or early 2028.

## Recommendation

To improve program administration, the General Manager of Visitor Venues in consultation with Human Resources, should:

### **3. Establish consistent performance reporting standards for contractors and internal operations.**

***Management Response:*** Management agrees with the recommendation. The original FOTA program required the MERC venues directly and through its partners pursue a policy of providing a first opportunity of jobs to economically disadvantaged residents living in economically distressed neighborhoods near the Oregon Convention Center. MERC Resolution 2015-22a affirmed that the basis of FOTA is that applicants meet two

requirements (living within the established geographic boundary and meeting income eligibility thresholds) to receive a first opportunity to apply for and interview for a MERC venue job. As communicated in response to recommendation two, management intends to establish performance reporting standards using the resolution's eligibility requirements.

**Proposed Plan:** To develop consistent performance reporting standards the General Manager of Visitor Venues will collaborate with Human Resources to define specific recruiting, interviewing, job offer, and job acceptance metrics to specifically track the number of applicants and hires that meet both the FOTA income threshold and FOTA boundary resident requirements.

**Timeline:** Management commits to establishing metrics with Human Resources by August 2025. That said, should any identified metrics require creating and/or updating systems, the timeline to implement those additional reporting standards may be extended (Metro is actively researching new Enterprise Resource Planning (ERP) systems and enhanced data analytics and reporting capabilities are key priorities in that assessment).

The General Manager of Visitor Venues will engage contract partners to clarify the FOTA mission requirements, and expectations. It is expected that the mechanics of their hiring processes will be similar and include recruiting, interviewing, job offer, and job acceptance steps. Upon confirmation, the performance reporting standards will be documented with partners so they can capture the same metrics as internal operations. Management believes this can be accomplished by August 2025.

#### **4. Publish performance reports periodically to inform the public, policy makers, and management about FOTA's outcomes.**

**Management Response:** Management agrees with this recommendation. To implement, management will need to define the FOTA income, residency, and recruitment/hiring performance reporting standards and capture data for internal operations and contractors as stated in audit recommendation three, above. The Metro HR system captures much of this data; therefore, performance reporting to MERC, the public, and management will commence after six months of data is collected (assumed data collection start of August 2025).

Similarly, the General Manager of Visitor Venues will need to engage contract partners about the specific and consistent data points required for their performance reporting. Depending upon their HR system capabilities and the data currently captured, reporting that is consistent with internal operations will commence as quickly as practicable.

**Proposed Plan:** Management commits to the following actions to establish a program report update schedule:

**Internal Reporting:** The audit cites that Metro Human Resources provided FOTA performance data for Fiscal Year 2022-23 and Fiscal Year 2023-24. To the extent that data provides information about the FOTA income, residency, and recruitment/hiring performance metrics, the General Manager of Visitor Venues will present that data, along with an analysis and recommendation of possible additional data that would be helpful to MERC in their oversight role, at a MERC meeting in the first quarter of 2026. Management will then report FOTA program hiring performance data to MERC twice annually at a regularly scheduled commission meeting.

**MERC Contractor Reporting:** The General Manager of Visitor Venues will engage contract partners to clarify the FOTA mission, requirements, and expectations, particularly the income threshold and target area residency requirements, as well as the expectation that their recruitment process includes data capture for

recruiting, interviewing, job offer, and job acceptance steps. The contractors will then be required to incorporate the updated data into regular reporting to MERC.

**Timeline:** Management estimates this action can be completed by April 2026 with regular reporting thereafter.

##### **5. Strengthen relationships with community-based organizations to connect community members with job opportunities.**

**Management Response:** Management agrees with this recommendation. Community-Based Organizations (CBOs) have historically been and remain critical to the success of the FOTA program. Deepening existing and establishing new relationships with CBO's that support job placements, ensuring the relevant CBOs know about the FOTA mission, requirements, expectations, and opportunities, and defining specific roles and responsibilities so that the CBOs know who to contact about hiring are important actions.

**Proposed Plan:** Management commits to the following actions to strengthen relationships with community-based organizations:

**Outreach and update to CBO contact list:** Metro Human Resources will contact existing CBOs to affirm their desire to remain connected to and supportive of the FOTA program (this will include providing each CBO the FOTA applicant eligibility requirements to ensure CBO/program fit). Human Resources will inquire of these CBOs, and other connected community partners active in the program's target areas, if they are either interested or can refer other CBOs who are interested in matching their clients to FOTA jobs. This action is expected to be completed by June 2025.

**FOTA Program Education, Roles and Responsibilities:** For the updated listing of interested CBOs, the General Manager of Visitor Venues will work with the MERC venues and Metro Human Resources to provide one or more engagements on the mission, requirements, expectations, and opportunities of FOTA, as well as specific roles, responsibilities, and contacts. These engagements will seek to understand from these organizations the training they and their clients need to use the program's offerings, as well as the frequency that such engagements would be helpful. This action is expected to be completed by January 2026.

**Contract Partner and CBO alignment:** The General Manager of Visitor Venues will engage the two venue contract partners to share the importance of CBOs to the program and for collaborative, as well as independent, relationship building between the parties. The General Manager of Visitor Venues will ensure the MERC contract partners are provided with the updated listing of CBOs for their use, as well as inclusion in the engagements to provide CBOs the specific information about their jobs and opportunities. This action will be completed in tandem with the above actions.

**Timeline:** Timelines for proposed actions listed above.

## **Recommendation**

To ensure alignment between FOTA and other workforce diversity efforts, the General Manager of Visitor Venues in consultation with Human Resources and Diversity, Equity, and Inclusion, should:

##### **6. Update FOTA to align with any changes to SPAREDI or other workforce diversity goals and strategies.**

**Management Response:** Management agrees to bring this recommendation to policy-makers for consideration as part of updates to Metro’s Strategic Plan to Advance Racial Equity, Diversity and Inclusion. As stated in the audit, the FOTA program’s alignment with Metro’s workforce diversity and other equity goals and strategies has been a question since at least the February 2015 FOTA program study. That study noted that the relationship between FOTA and other Metro diversity and equity goals is ambiguous, stating, “This is especially true as Metro has taken steps to deepen its commitment toward diversity and equity, for example through its recent Diversity Action Plan.”

The Diversity Action Plan evolved and in 2016 Metro published its Strategic Plan to Advance Racial Equity, Diversity and Inclusion (SPAREDI). The strategic plan focuses on removing barriers for people of color and improving equity outcomes for these communities by improving how Metro works internally and with partners around the Portland region. At that time, MERC sent a letter to Metro Council expressing, “..., the Metropolitan Exposition and Recreation Commission wishes to express its strong support for Metro's Strategic Plan to Advance Racial Equity, Diversity and Inclusion and urges Metro Council to adopt and implement it.”

These two contemporaneous actions, MERC’s FOTA Resolution 2015-22a and Metro Council’s adoption of its SPAREDI, indicate that the governance bodies likely understood the ambiguity, yet moved forward with the FOTA program and the SPAREDI as written. While future public engagement and subsequent direction from MERC and/or Metro Council may result in closer alignment and/or small to large scope program modifications, FOTA in its initial and current form was intended to provide “first opportunity for available jobs to economically disadvantaged residents living in economically distressed neighborhoods in the immediate vicinity of the Convention Center site.” While management asserts that the FOTA program is a strategy that aligns with the overarching principles of the SPAREDI (leading with a racial equity focus, eliminating disparities that people of color experience, and generating solutions that address the needs of historically marginalized groups), with a specific tie to SPAREDI Goal C (‘through training and hiring practices that break down barriers for applicants of color, Metro achieves a racially diverse workforce’), the misalignment described in the audit may be in reference to the FOTA program’s narrowed geographic focus as opposed to the SPAREDI’s regionwide lens.

Examples where Metro’s equity actions intersect with the February 2015 FOTA program study includes the Metro initiated Construction Career Pathways Regional Framework. That project, often referred to as C2P2, has resulted in 9 public agencies adopting the framework, which uses a regional approach to recruiting, training, and retaining women and people of color in the construction trades. All Metro departments, including the MERC venues, are required to integrate the essential framework points into construction projects. Another example is the outcomes of the 2019 Oregon Convention Center renovation project. The renovation construction contractor proposal process resulted in the largest Oregon public works contract being awarded to a BIPOC prime contractor at that point in time. Metro’s procurement process used typical contractor selection criteria and to increase opportunities to non-established general contractors emphasized the value of diversity and inclusion by integrating State of Oregon Certification Office for Business Inclusion and Diversity (COBID) criteria which supported the firm’s ability to submit a responsive proposal. The construction contract set project expectations and goals for workforce diversity and financial commitments. Renovation highlights include that 51% of total contract dollars were awarded to COBID registered minority and women-owned businesses, 40% of hours worked were completed by people of color, and of total dollars paid to subcontractors, 54% were awarded to majority Black-owned businesses.

**Proposed Plan:** As described in the above commitments, management intends to strengthen its oversight of the FOTA program before proposing any significant changes to policy decision-makers. In addition, the audit cites that stakeholders had varying responses to what they believed FOTAs purpose

and outcomes were. The actions identified in management's responses to recommendations one through five include documenting and communicating FOTA requirements to help clarify the FOTA program and its current alignment with SPAREDI Goal C.

***Timeline:*** Following the two-year program stabilization period described in the above responses, management agrees to engage with policy makers (MERC Commission and Metro Council) to obtain direction regarding the alignment between SPAREDI, FOTA and other workforce diversity goals and strategies.



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TRAVEL  
**PORTLAND**

# 4TH QUARTER 2024-25 REPORT

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Highlights:

[Executive Summary – Page 3](#)



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Megan Conway .....	President & CEO
James Jessie.....	Chief Operating Officer
Greg Newland .....	Chief Marketing Officer
Yang Yang .....	Chief Financial Officer

**Travel Portland**  
100 SW Main, Suite 1100  
Portland, OR 97204  
503.275.9750





# EXECUTIVE SUMMARY

## ACCOMPLISHMENTS

- In this fiscal year, OCC realized more than \$16.5 million in revenue from Travel Portland booked business. Community impact ROI from all future bookings was 44.4 to 1.
- Fifty-eight new and nine repeat OCC conventions were booked for future years during FY25 worth more than \$30.5 million in OCC revenue and community economic impact more than \$162.2 million. Total Travel Portland bookings, including single hotel will result in more than \$237.1 million of economic impact.
- Across domestic media outlets this fiscal year, Portland was included in 21,093 placements with a total impression of more than 442.8 billion that could potentially influence Portland as a business and leisure travel destination.
- Travel Portland's Convention Sales Team closed out FY 24-25 with its best-ever booking total: 331,919 room nights, finishing at 107% of goal (310,000). This year's result reflects a 4.54% increase over FY 23-24.
- National Education Association convened the largest convention in Portland history over dates of June 25 – July 7, 2025. The event consumed over 32,000 hotel room nights and represented an estimated \$18 million in direct spending.
- The PR team secured 368 pieces of positive media coverage across the publications we identify as being most valuable in reaching consumers with influential messaging about Portland being a desirable destination.

## TRENDS, SUCCESSES, OBSTACLES

- Total combined TLT/TID collection in FY25 YTD is \$21.7M, representing -3% year-over-year change. The decline is largely due to slow recovery in Portland's tourism industry.
- 1 group was lost in the fourth quarter due to safety and perception concerns which would have totaled 2,405 room nights with an estimated community economic impact of approximately \$1.6 million.
- To spur summer travel demand for the city, Travel Portland launched a marketing campaign — Love, Portland — that targets leisure travelers in priority West Coast feeder markets via streaming video, sponsored content, and a surprise-and-delight PR activation (Golden Bookmark).
- Travel Portland's always-on partnerships with online travel agencies (OTAs) generated 201,877 incremental room nights in Portland in FY 24-25, providing much-needed help to the lodging community.
- Travel Portland worked in partnership with ORLA and DMOs throughout the state to advocate for key funding from the state during the legislative session, while also testifying in opposition to bills focusing on increases and modifications in the statewide lodging tax structure.

## MERC CONTRACT TARGETS

TARGET #	TARGET DESCRIPTION	YEAR TO DATE ACTUAL	ANNUAL TARGET
1	OCC revenue target	\$16,591,874	\$17 Million
2	ROI on future OCC business	5.7	3.1
3	Lead conversion	14%	17%
4	Services performance survey	3.9	3.8
5	Public relations/media*	29	25
6	Community economic impact	44.4	10.7

## CITY CONTRACT GOALS

OBJECTIVE #	GOAL DESCRIPTION	YEAR TO DATE ACTUAL	ANNUAL GOAL
1	Convention Sales and Marketing Economic Impact ROI	27.1	21.0
3	Report the Health of the Market Using Third Party Resources	<i>See pages 4 &amp; 5</i>	
5	International visitors against comp set**	10.0%	Within 20%
7	Total Media Placements	368	250
7	Total Media Engagements for Minority-Owned Businesses	2,381	825
8	Services Performance Survey	31	6/Year

\*QTR 3 pitches were correctly reported when displayed line by line, but when when summarized on this page were miscalculated. The correction has been adjusted for QTR 4 YTD above.

\*\*As of Qtr 3, Travel Portland is now reporting the actual difference in percentage points in international arrivals to its competitive set on 5-year rolling basis. Previously Travel Portland had reported its percentage of change in arrivals in the Executive Summary.



# EXECUTIVE SUMMARY

HOTEL DEMAND			
COMPETITIVE SET COMPARISON			
Smith Travel			
Research Central Business Districts			
	Occupancy (%)	ADR (\$)	RevPar (\$)
Portland Central City +	57.5%	\$ 147.71	\$ 84.89
Denver	65.5%	\$ 206.91	\$ 135.58
Seattle	68.5%	\$ 209.60	\$ 143.58
Salt Lake City	71.9%	\$ 178.40	\$ 128.33
Nashville	77.0%	\$ 280.04	\$ 215.73
Austin	68.7%	\$ 249.53	\$ 171.54
Minneapolis	51.6%	\$ 168.33	\$ 86.87
San Francisco	61.4%	\$ 269.88	\$ 165.65

*\*Smith Travel Report is on a calendar basis, not Travel Portland's Fiscal Year*

	Smith Travel Research - Region*							
	Occupancy		ADR		RevPar		Demand	
	This Year	Change	This Year	Change	This Year	Change	This Year	Change
Downtown	57.5%	3.2%	\$ 147.71	-4.0%	\$ 84.89	-0.9%	1,077,412	3.2%
Airport	63.3%	0.9%	\$ 128.86	-4.2%	\$ 81.63	-3.3%	367,925	-1.5%
Eastside	60.8%	-1.3%	\$ 101.73	-3.5%	\$ 61.82	-4.7%	54,005	-1.3%
Jantzen Beach	58.4%	1.3%	\$ 107.79	-9.7%	\$ 62.92	-8.4%	153,300	1.3%
City of Portland +	59.2%	2.3%	\$ 134.65	-5.0%	\$ 79.76	-2.8%	1,630,491	1.7%

*\*Smith Travel Report is on a calendar basis, not Travel Portland's Fiscal Year*

REGION	LODGING TAX COLLECTIONS*			
	QUARTER 4			
	TLT/TID			
	FY25 (\$)	FY25 (% of TLT)	CHANGE FY24 to FY25 (\$)	CHANGE FY24 to FY25 (%)
Central City	\$11,546,670	53%	(\$66,436)	-1%
Airport	\$3,272,584	15%	(\$876,772)	-21%
Eastside	\$214,532	1%	\$46,188	27%
Jantzen Beach	\$1,070,037	5%	(\$161,487)	-13%
Subtotal	\$16,103,824	74%	(\$1,058,507)	-6%
Online Travel Agency	\$2,650,476	12%	\$516,816	24%
Short Term Rental	\$2,850,524	13%	(\$176,637)	-6%
Other	\$76,807	0%	(\$18,177)	-19%
Subtotal	\$5,577,807	26%	\$322,002	6%
Grand Total	\$21,681,631	100%	(\$736,506)	-3%

*\*Data provided by the City of Portland Revenue Division.*

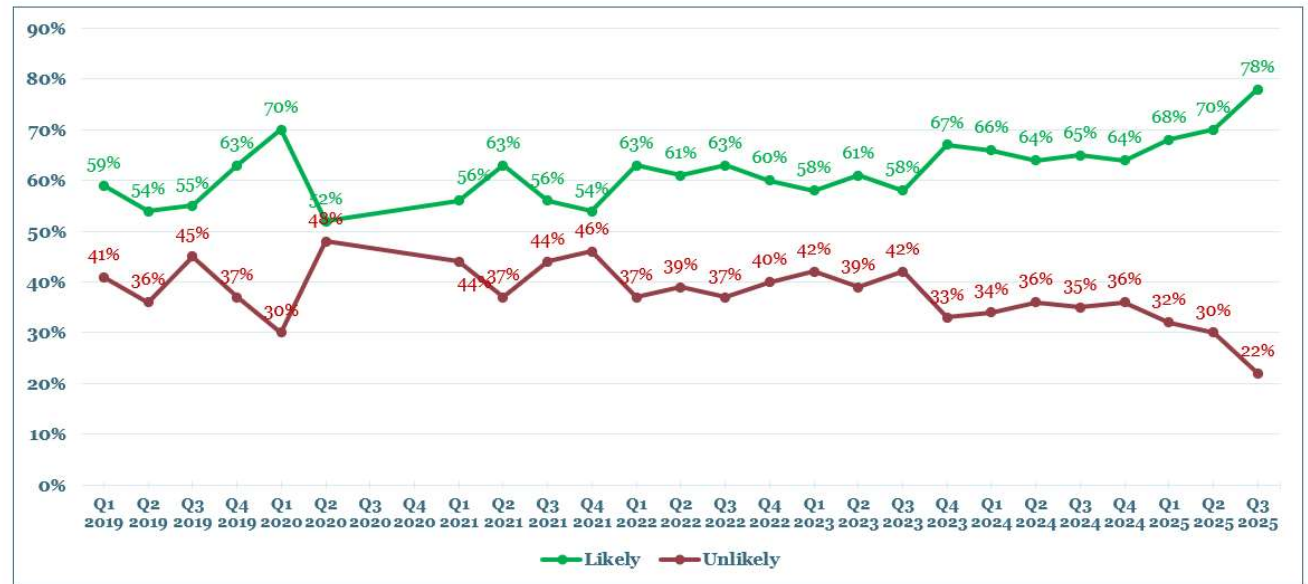
# EXECUTIVE SUMMARY

## AD ACCOUNTABILITY: INCREMENTAL VISITOR SPENDING GENERATED BY ADVERTISING

Advertising accountability: Results for spring/summer campaign available in Quarter 2 of FY26.

## INTENT TO TRAVEL

### Likelihood of visiting Portland (among US adults)



## INTENT TO TRAVEL

### Likelihood of visiting Portland (among those who live in the West)

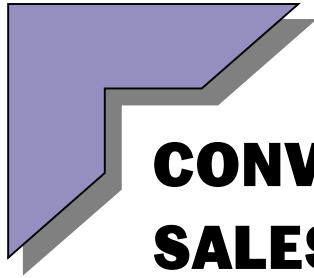




# CONVENTION SALES

OREGON CONVENTION CENTER BOOKING REVENUE FROM TRAVEL PORTLAND BOOKINGS			
	OCC Revenue	Annuals	Total Potential Future Business
FY 24/25	\$ 16,591,874	\$ -	\$ 16,591,874
FY 25/26	\$ 18,696,411	\$ 973,588	\$ 19,669,999
FY 26/27	\$ 11,343,837	\$ 2,607,030	\$ 13,950,867
FY 27/28	\$ 4,575,687	\$ 2,104,438	\$ 6,680,125
FY 28/29	\$ 7,259,764	\$ 3,007,287	\$ 10,267,051
FY 29/30	\$ 6,018,397	\$ 2,504,695	\$ 8,523,092
FY 30/31	\$ 393,477	\$ 3,007,287	\$ 3,400,764
FY 31/32	\$ -	\$ 2,504,695	\$ 2,504,695
FY 32/33	\$ -	\$ 3,007,287	\$ 3,007,287
FY 33/34	\$ 727,661	\$ 2,504,695	\$ 3,232,356
FY 34/35	\$ 1,369,209	\$ 3,007,287	\$ 4,376,496
<b>TOTAL</b>	<b>\$ 66,976,317</b>	<b>\$ 25,228,289</b>	<b>\$ 92,204,606</b>
<p><i>*FY 24/25 OCC Revenue includes the following meetings that occurred during quarter 4 of FY 23/24 at OCC, but had not settled in OCC's accounting software (USD) at the time of reporting: American Society for Engineering Education and United National Indian Tribal Youth.</i></p> <p><i>*FY 24/25 OCC Revenue does not include the following meeting that occurred during quarter 4 at OCC, but had not settled in OCC's accounting software (USD) at the time of reporting: National Education Association. It will be included in FY25/26 estimate.</i></p>			

OREGON CONVENTION CENTER PROJECTED FUTURE REVENUE			
Total Travel Portland Contract:	QTR	YTD	Target
New OCC Bookings	23	58	
Repeat OCC Bookings	3	9	
Total OCC Bookings	26	67	
Room Nights from OCC Bookings	91,048	185,050	
Future OCC Revenue Booked during FY 2024/25	\$ 15,210,611	\$ 30,539,511	
ROI OCC Bookings	\$ 15.7	\$ 5.7	3.1 to 1
Community Economic Impact from OCC Bookings	\$ 69,818,715	\$ 162,206,549	
Total Room Nights Booked	120,424	331,919	
Total Community Economic Impact from Bookings	\$ 87,811,947	\$ 237,136,537	
ROI on Total Community Economic Impact	\$ 90.6	\$ 44.4	10.7 to 1
OCC Revenue Realized During FY 2024/25*	\$ 6,145,039	\$ 16,591,874	\$17 Million
<p><i>*OCC YTD Revenue Realized includes the following meetings that occurred during quarter 3 of FY 23/24 at OCC, but had not settled in OCC's accounting software (USD) at the time of reporting: Harbor Wholesale Foods, Food Northwest, Mary Kay, Inc., Forest Business Network, American Association for Anatomy, and Future Business Leaders of America - Phi Beta Lambda.</i></p> <p><i>*OCC Revenue Realized does not include the following meetings that occurred during quarter 4 at OCC, but had not settled in OCC's accounting software (USD) at the time of reporting: National Education Association. It will be reported next quarter.</i></p>			




# CONVENTION SALES

OCC LEAD CONVERSION	
	As of July 1, 2025
Lead Conversion Percentage	14%
Benchmark / Annual Target -17%	

OREGON CONVENTION CENTER FUTURE GROUP BOOKINGS					
AS OF JULY 1, 2025					
	FY 2024-25	FY 2025-26	FY 2026-27	FY 2027-28	FY 2028-29 and beyond
Current	52	42	22	10	21
4 Year Average	Current	1 yr. out	2 yrs. out	3 yrs. out	Beyond 3 yrs.
24/25)	50	41	23	12	13

OREGON CONVENTION CENTER REVENUE		
THREE YEAR AVERAGE		
	Total Contract	
	Quarter	YTD
OCC Revenue Generated (3 yr. average)	\$ 7,408,379	\$ 18,817,683
Travel Portland Contract Costs	\$ 968,820	\$ 5,336,005
ROI (Revenue / Costs)	7.6	3.5

4TH QUARTER - OREGON CONVENTION CENTER LOST BUSINESS					
	Groups	Total Room Nights	Attendees	Lost OCC Revenue	Lost Community Economic Impact
Total	39	210,708	101,011	\$ 23,750,547	\$ 127,013,860



# CONVENTION SALES

DIVERSE GROUPS/MINORITY PROJECTED FUTURE REVENUE		
Total Travel Portland Contract	4th Quarter	YTD
New Diverse/Minority Group Bookings	2	13
Total Diverse/Minority Group Bookings	2	13
Room Nights from Diverse/Minority Group Bookings	635	22,351
Diverse/Minority Group Leads	8	27
Diverse/Minority Group Lost Leads	6	18

For the fourth quarter of FY 2024/25, minority bookings created an estimated economic impact to the greater metro Portland community of approximately \$200,000. Booked groups included the following:

National Indian Child Welfare Association	\$ 15,025
Indigenous Journalists Association	\$ 193,492

4TH QUARTER - OREGON CONVENTION CENTER CANCELLATIONS							
Account Name	Groups	Reason	Total Room Nights	Attendees	Lost OCC Revenue	Lost Community Economic Impact	Arrival Date
Total OCC Cancellations	0	N/A	0	0	\$ -	\$ -	N/A

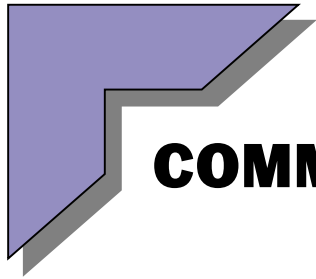




# CONVENTION SERVICES

ACTIVITY DESCRIPTION	4TH QUARTER	YTD
OCC groups occurring during the quarter	14	51
Pre-convention attendance building - Site tours	15	56

TRAVEL PORTLAND POST CONVENTION SURVEY							
Overall impression of the following:							
Answer Options	Excellent = 4	Good = 3	Average = 2	Poor = 1	N/A	Rating Average	Response Count
Travel Portland sales staff	8	1	0	0	1	3.9	9
Travel Portland convention services staff	10	0	0	0	0	4.0	10
Travel Portland collateral/promotional materials	10	0	0	0	0	4.0	10
Quality and user-friendliness of the Travel Portland website	9	0	0	0	1	4.0	9
Average rating for the quarter						4.0	
Average rating YTD						3.9	
Target						3.8	
In planning your event from start to finish, how would you describe your relationship with your Sales Manager and/or Services Manager?							
<p>From start to finish, working with the Travel Portland team was an exceptional experience. Alenna Fouts is a true star. I've worked with many Convention Services Managers, and none have offered the level of unwavering support that she did. She was present before, during, and even after our event. Her enthusiasm for both Portland and the meetings industry is infectious. She's welcoming, personable, and an absolute joy to work with. Shawna Wellman was also a constant presence and partner throughout the journey. She supported us during site visits, the initial contracting process, COVID-related rescheduling, and the event itself. She attended our pre-con and sincerely meant it when she said I could reach out if I needed anything. I ended up needing to, and she was there without hesitation. I also want to recognize Desiree Everett, who stepped in multiple times during planning to offer her expertise, help smooth ruffled feathers of a senior executive on my team, and ensure that AOCS and the Portland hoteliers found a mutually beneficial path forward amid our attendance challenges. Desiree always knew exactly what to say or do to keep small concerns from turning into bigger issues. She is a consummate professional, and Travel Portland is lucky to have her on the team.</p> <p>The entire Travel Portland team delivers a level of service that truly sets the standard in our industry.</p> <p>Awesome. Alenna was always there to help, providing suggestions and solutions when needed. When she couldn't be onsite, Beth stepped in and it was as seamless as possible. I enjoyed working with the entire team.</p> <p>Wonderful! Crista Kocher was outstanding and even participated in our pre-conference webinar with us. The micro-site was also a fabulous addition to our marketing materials.</p> <p>Fantastic :) Beth was a great addition to our planning team for this event.</p> <p>As I mentioned previously, this conference's success was largely impacted for the better by Crista's attention and assistance to every single request, big or small, that was made. This entire process was made immensely easier due to her dedication to the success of our event.</p> <p>Beth was wonderful to work with from the very beginning and all the way through to the end.</p> <p>The team at Travel Portland were friendly, available and proactive, which was truly appreciated in our event planning cycle.</p> <p>Very hands on, always had an answer for my questions and an idea for my brainstorming sessions.</p> <p>We had a great relationship, the conference went so well, and everything was easy and smooth.</p>							
<b>Completed Group Survey:</b>							
American Oil Chemists' Society				Oregon Governor's Conference on Tourism (x2)			
American Physical Society				Oregon Dental Association			
Association of Public Health Laboratories (x2)				American Association for Anatomy			
Hematology/Oncology Pharmacy Association (x2)							



# COMMUNICATION & PR

TOTAL MEDIA NARRATIVE	Q4	YTD
Placements	4,545	21,093
Impressions	128,811,043,877	442,814,351,533

Traditional media mentions captured across print and online that may influence consumer perception of Portland as a business and leisure travel destination.

MERC-RELATED MEDIA PLACEMENTS	Q4	YTD
Placements	2	27
Impressions	9,067	651,722

Earned media placements generated by Travel Portland public relations efforts that mention the Oregon Convention Center or cover industry topics related to Portland as a meeting destination.

TARGETED MEDIA NARRATIVE	Q4	YTD	Target Goal
Placements	107	368	250
Impressions	1,464,969,313	7,760,443,894	

Print and online media outlets strategically targeted by Travel Portland's public relations efforts because they are most influential to potential visitors.

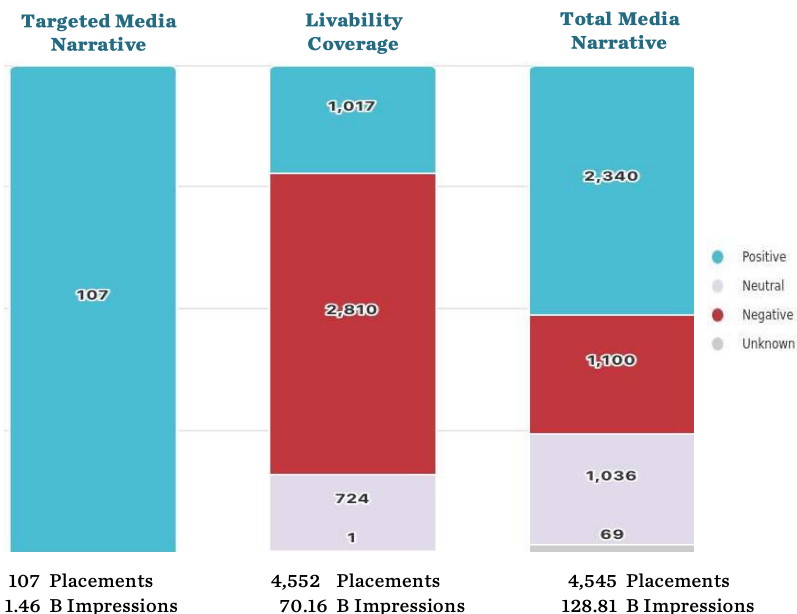
TARGETED INTERNATIONAL MEDIA*	Q4	YTD
Placements	0	0
Impressions	0	0

International print and online media outlets strategically targeted by Travel Portland's public relations efforts in international markets, including, but not limited to: United Kingdom, The Netherlands, Oceania and Canada.

\*International media results on hold for FY 24-25

\* INTERNATIONAL REPORTING ON HIATUS

## 4TH QUARTER MEDIA SENTIMENTS



MUCK RACK

MEDIA ENGAGEMENTS FOR MINORITY-OWNED	Q4	YTD	Target Goal
Engagements	798	2,381	825

A media engagement is defined as an interaction with media regarding a single topic or issue.



# COMMUNICATION & PR

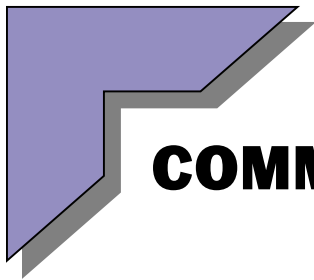
## 4TH QUARTER KEY MESSAGES PLACEMENTS & IMPRESSIONS

### TOTAL MEDIA NARRATIVE

Key Messages Summary				Export ▾
Key Message	Articles ▾	Unique Outlets	Average UVM 📊	
Q4TotalMFY2425 <small>Base term</small>	4,545	1,271	26,465,086	
Shopping	898	489	19,478,011	
Outdoors	370	196	41,723,052	
Culinary	345	246	34,666,575	
Family-Friendly	273	174	26,019,557	
Neighborhoods	212	176	25,227,788	
Diversity	182	152	22,399,769	
Arts & Culture	56	44	13,113,562	
Hotels & Lodging	34	22	2,501,522	
Activities & Attractions	29	25	43,311,030	
Festivals & Events	21	14	27,989,853	

### NEGATIVE LIVABILITY ISSUES

Key Messages Summary				Export ▾
Key Message	Articles ▾	Unique Outlets	Average UVM 📊	
Q4LivabilityFY2425 <small>Base term</small>	4,552	1,291	14,721,816	
Crime	1,634	681	15,435,121	
Protest	1,282	669	12,873,002	
Safety	1,157	554	13,383,000	
travel	412	213	25,167,084	
Homelessness	325	184	13,991,530	
Fentanyl	287	133	15,143,328	
Camping	154	96	26,055,165	
garbage	37	34	33,877,063	
Drug use	36	26	44,941,303	
graffiti	34	28	27,596,907	



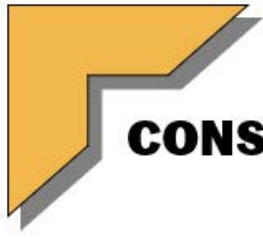
## COMMUNICATION & PR

ARTICLES			MERC		
Publication Date	Outlet	Headline	Medium	Total Circulation	Placements
April 2025	Life Blend Hub Blog	Portland Stole This Venezuela Native's Heart—Now He's One of Its Biggest Champions for Events	Online	N/A	1
April 2025	Meeting's Today	Portland's Natural Spaces Are Fertile Ground for Meetings and Events	Online	9,067	1
Total				9,067	2

*\*Entries that appear to be duplicate articles represent different media placements, i.e. print, online and broadcast.*

TRAVEL PORTLAND SPONSORED ARTICLES			MERC	
Publication Date	Outlet	Headline	Medium	Total Circulation
May 2025	Northstar Meetings Group	5 Days in Portland	Online	30,479
Total				30,479

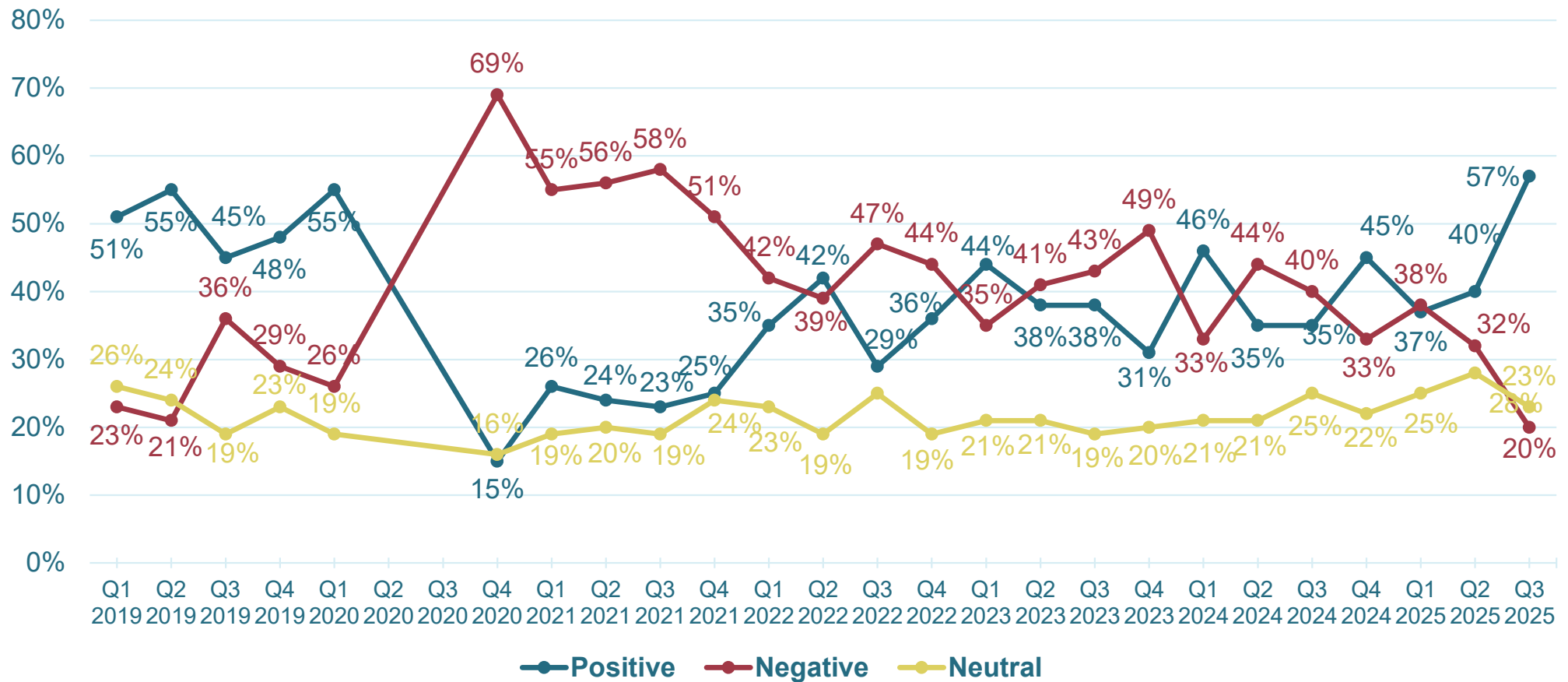
PITCHES DELIVERED	
1	Pitched NYC-based MERC writers in-person desksides with Travel Portland team
2	Met with Sarah Braley of Meetings & Conventions for deskside conversation
3	Amplified Literary Arts HQ in Golden Bookmark to Portland activation, supporting Portland's identity as a "literary city"
4	Pitched Global Traveler USA contributor Lina Zeldovich sustainable meetings and Indigenous Marketplace experiences
Target Goal: Deliver 6-7 meetings-related pitches to industry media on a quarterly basis. Twenty-five total over the fiscal year.	

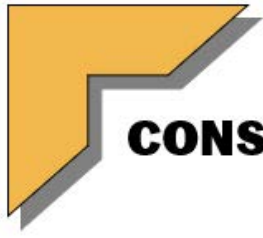


## CONSUMER SENTIMENT

# PORTLAND CONSUMER RESEARCH

Q: Would you consider the general tone of media coverage you saw or heard about Portland to be:

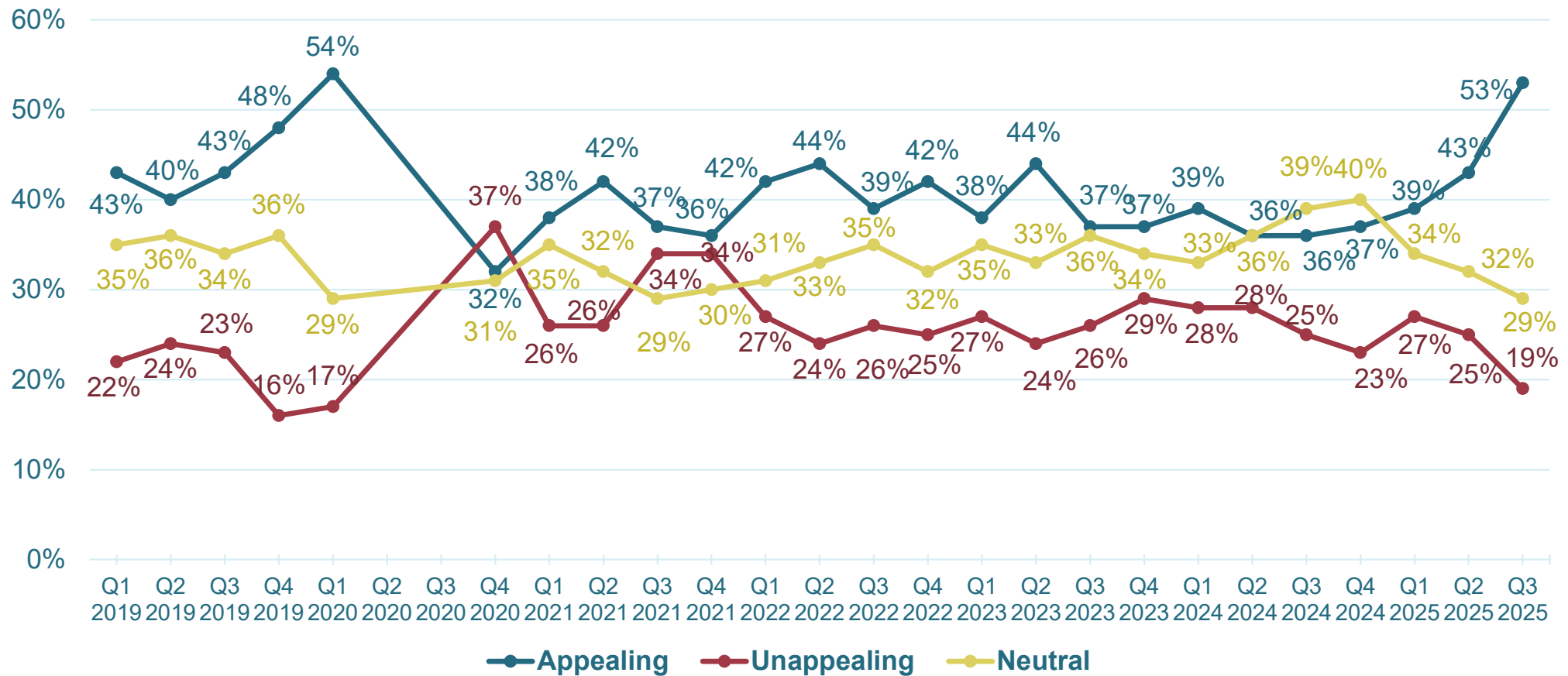


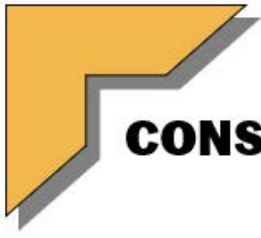


## CONSUMER SENTIMENT

# PORTLAND CONSUMER RESEARCH

Q: How appealing is Portland as a potential vacation destination to you?



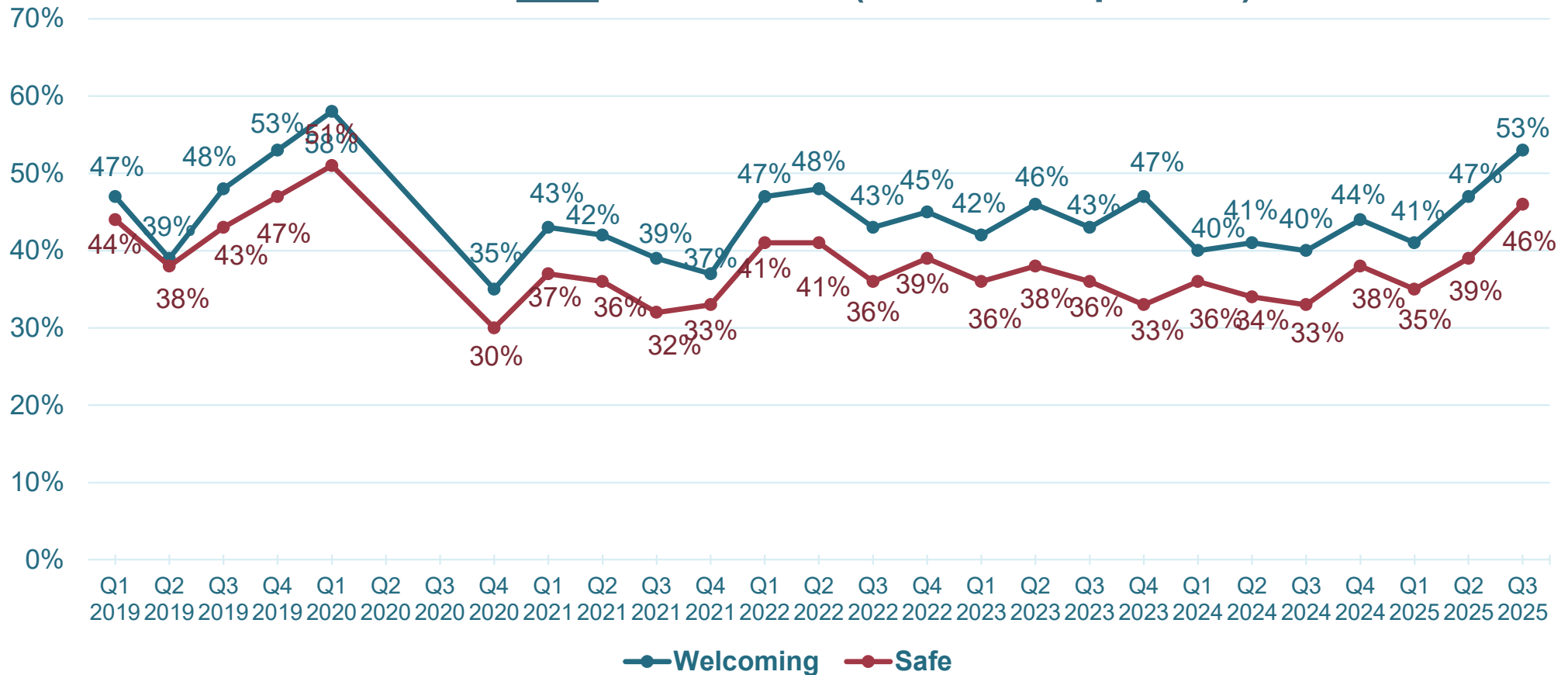


## CONSUMER SENTIMENT

# PORTLAND CONSUMER RESEARCH

Q: Portland is a welcoming destination. (AGREE - Top 2 Box)

Q: Portland is a safe destination. (AGREE - Top 2 Box)

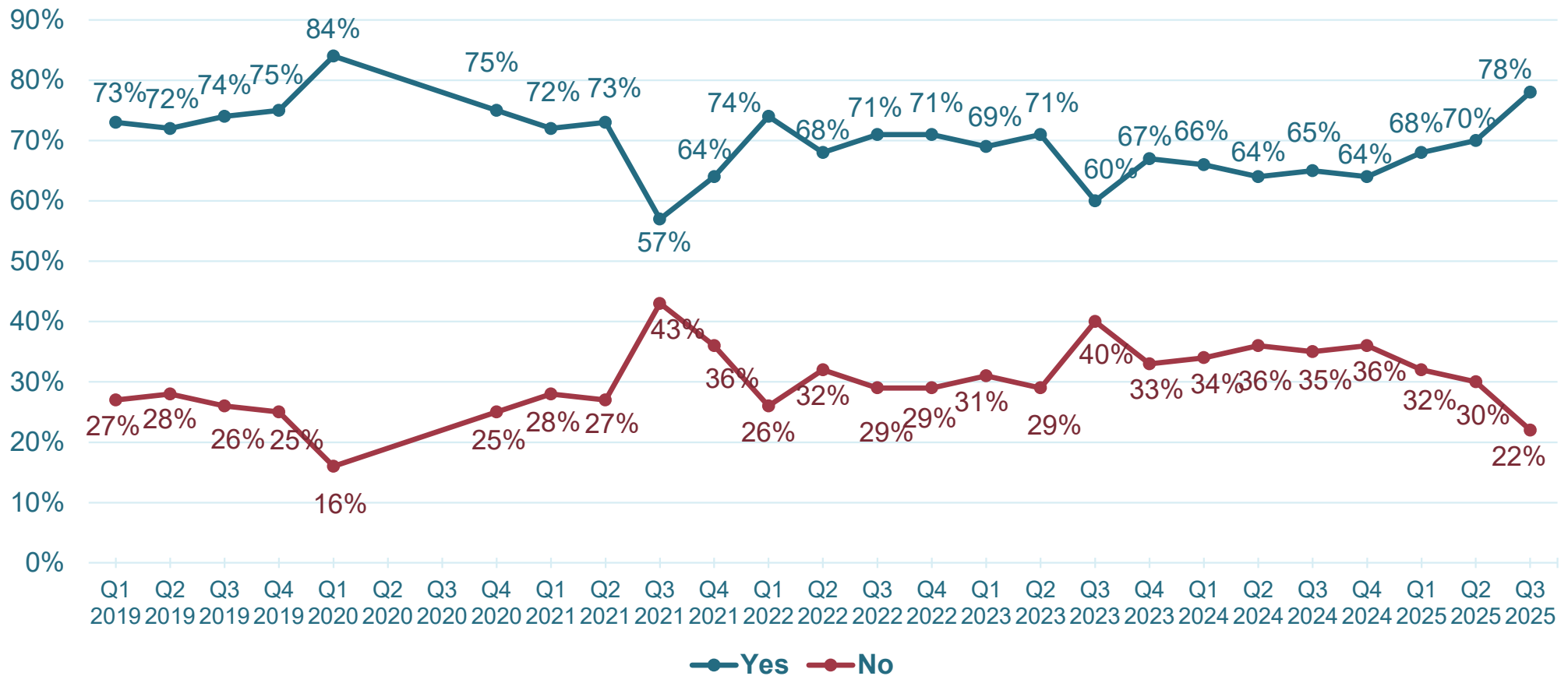


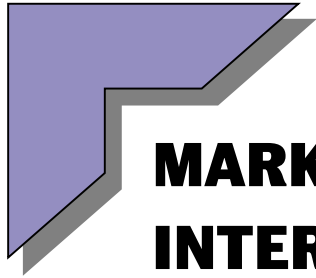


## CONSUMER SENTIMENT

# PORTLAND CONSUMER RESEARCH

Q: If you have visited Portland before, are you likely to visit again?





# MARKETING & INTERNATIONAL TOURISM

MARKETING		
TravelPortland.com	4th Quarter	YTD
Visits	1,249,639	5,013,157
International Visits	64,481	273,797
Referrals	194,108	726,608
Business and Event Detail Views	642,183	2,379,998
TravelPortland.com/meetings		
Venue Finder Page Views	3,746	10,966

Source: Google Analytics

INTERNATIONAL TOURISM			
International Visits/Arrivals*	2nd Quarter	4th Quarter	Goal
Portland**	-15.0%	-13.0%	
Competitive Set***	-13.0%	-3.0%	
International Visitors Comparison to Comp Set****	2.0%	10%	within 20% Comp Set

\*Source: Tourism Economics - An Oxford Economics Company reports twice during the calendar year.

\*\*Be within 20% of our competitive sets' performance for overall visits/arrivals (5 year rolling basis).

\*\*\*Competitive set = Denver, Salt Lake City, Minneapolis

\*\*\*\*This number represents the difference in actual percentage points on International Arrivals from between Portland and its competitive set on a five year rolling basis.

\*\*\*\*This will be a re-building goal for 5 years.



## DIVERSITY EMPLOYMENT STATISTICS 2024-25

### TRAVEL PORTLAND GOALS AND OBJECTIVES BY JOB CATEGORIES

	June 30, 2025		Fourth Quarter		
Job Category	Category Number	Total	Actual Percentage	Goal Percentage	Objective
	Number of Females	Number of Staff			
Executive/Senior Level	5	12	42%	40-60%	Monitor
First/Mid Level Manager	8	11	73%	40-60%	Monitor
Professionals	16	22	73%	40-60%	Monitor
Sales Workers	8	10	80%	40-60%	Monitor
Admin Support Workers	14	19	74%	40-60%	Monitor
Total	51	74	69%	40-60%	Monitor
	Number of Minorities	Number of Staff			
Executive/Senior Level	4	12	33%	15-33%	Monitor
First/Mid Level Manager	2	11	18%	15-33%	Monitor
Professionals	7	22	32%	15-33%	Monitor
Sales Workers	5	10	50%	15-33%	Monitor
Admin Support Workers	11	19	58%	15-33%	Monitor
Total	29	74	39%	15-33%	Monitor
This report is based on current full and part-time staff.					





## FIRST OPPORTUNITY TARGET AREA (FOTA) 4TH QUARTER 2024-25

### HIRING

Job Posting Locations	The Skanner	El Hispanic News	Hispanic Chamber
	WorkplaceDiversity.com	Urban League	Monster.com
	VeteransConnect.com	Mosaic Metier	PDX Pipeline
	HispanicDiversity.com	Partners in Diversity	AllDiversity.com
	DisabilityConnect.com	Indeed	LinkedIn
	OutandEqual.com	Destinations International	Travel Portland website
	LGBTConnect.com	H-Careers	PDX Women in Tech
Current Employees residing in MERC FOTA		Mac's List	Oregon Destination Assn
		14	

### PURCHASING (YTD)

Travel Portland expenditure with MERC FOTA area businesses	\$	3,423,813
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### PARTNERSHIP

Total Partners	Within FOTA	Diverse Partners/Minority (Self-Identified)	Women-Owned
1819	364	315	379

### MWESB PURCHASING PARTICIPATION FY 2024-25 (YTD)

	MWESB Expended	Total Expended	Percentage of Total Spend on MWESB Expended
COBID or Other State Certified	\$506,561	\$6,360,131	8%
Self-Reported	\$1,309,998	\$6,360,131	21%
<b>Total</b>	<b>\$1,816,559</b>	<b>\$6,360,131</b>	<b>29%</b>

For the last 36 years Travel Portland has implemented a voluntary MBE/DBE/WBE purchasing program that strives to ensure a high level of participation with certified minority-owned, disadvantaged or women-owned businesses when securing services and supplies that are purchased using lodging tax dollars.

**OCC SALES AND MARKETING BUDGET**

	Annual Budget	MERC QTR Ending 06-30-25	TID/TLT QTR Ending 06-30-25	Subtotal QTR Ending 06-30-25	Sum MERC YTD 06-30-25	Sum TID/TLT YTD 06-30-25	Sum of YTD 06-30-25	Percent
<b>Expenses</b>								
<u><b>MERC Supported - Professional Services</b></u>								
<b>Professional Services</b>								
<u><b>Convention Sales</b></u>								
<u><b>Direct Sales:</b></u>								
Subtotal - Convention Sales Professional Services	1,859,725	379,075	267,154	646,229	1,859,724	507,023	2,366,746	127.26%
<u><b>Program Support</b></u>								
Subtotal - Program Support	278,959	69,740	0	69,740	278,959	0	278,959	100.00%
<u><b>Research</b></u>								
Subtotal - Reserach Professional Services	88,725	0	39,585	39,585	88,725	65,179	153,904	173.46%
<u><b>Convention Services</b></u>								
Subtotal - Convention Services Professional Services	268,025	76,800	28,549	105,349	268,025	113,932	381,957	142.51%
<u><b>Other Contractual Professional Services</b></u>								
Subtotal - Other Contractual Professional Services	333,825	50,470	61,703	112,173	325,465	189,114	514,580	154.15%
<i>Total - MERC Supported - Professional Services</i>	<i>2,829,259</i>	<i>576,084</i>	<i>396,992</i>	<i>973,076</i>	<i>2,820,898</i>	<i>875,248</i>	<i>3,696,146</i>	<i>130.64%</i>
<u><b>Other Non-Contractual Professional Services</b></u>								
<i>Total - Other Non-Contractual Professional Services</i>	<i>0</i>	<i>0</i>	<i>55,863</i>	<i>55,863</i>	<i>0</i>	<i>216,761</i>	<i>216,761</i>	<i>0.00%</i>
<u><b>Convention Sales - MERC Supported Program of Work</b></u>								
<u><b>Sales Calls, Trips and Missions</b></u>								
Subtotal - Sales Calls, Trips and Missions	220,000	72,432	0	72,432	220,000	0	220,000	100.00%
<u><b>Multicultural Sales Efforts</b></u>								
Subtotal - Multicultural Sales Efforts	120,000	51,016	517	51,533	120,000	991	120,991	100.83%
<u><b>Trade Shows and Industry Events</b></u>								
Subtotal - Industry Trade Shows and Events	865,500	174,932	29,560	204,492	865,500	73,112	938,612	108.45%
<u><b>Familiarization Tours &amp; Site Visits</b></u>								
Subtotal - Familiarization Tours	440,000	33,341	44,795	78,136	307,463	44,795	352,258	80.06%
<u><b>Other Programs</b></u>								
Subtotal - Other Programs	244,000	46,293	20,140	66,433	244,000	27,419	271,419	111.24%
<i>Total Convention Sales MERC Supported Program of Work</i>	<i>1,889,500</i>	<i>378,014</i>	<i>95,011</i>	<i>473,026</i>	<i>1,756,963</i>	<i>146,317</i>	<i>1,903,280</i>	<i>100.73%</i>
<b>Other Departments - MERC Supported POW</b>								
<u><b>Convention Services - Other Programs</b></u>								
Subtotal - Con Svcs - Other Programs	125,000	10,191	105,181	115,372	124,903	202,964	327,867	262.29%
<u><b>Research - Other Programs</b></u>								
Subtotal - Research - Other Programs	100,000	0	62,027	62,027	100,000	295,292	395,292	395.29%
<u><b>DEI - Other Programs</b></u>								
Subtotal - DEI - Other Programs	125,000	1,790	50,694	52,484	125,000	50,694	175,695	140.56%
<u><b>Communications/PR</b></u>								
Subtotal - Comm/PR - Other Programs	125,000	2,741	39,579	42,320	125,000	63,495	188,495	150.80%
<u><b>Marketing</b></u>								
Subtotal - Marketing - Other Programs	283,241	0	182,109	182,109	283,241	1,169,889	1,453,130	513.04%
<i>Total Other Depts MERC Supported Program of Work</i>	<i>758,241</i>	<i>14,722</i>	<i>439,591</i>	<i>454,313</i>	<i>758,144</i>	<i>1,782,335</i>	<i>2,540,479</i>	<i>335.05%</i>
<b>Grand Total</b>	<b>5,477,000</b>	<b>968,820</b>	<b>987,457</b>	<b>1,956,277</b>	<b>5,336,005</b>	<b>3,020,660</b>	<b>8,356,666</b>	<b>152.58%</b>

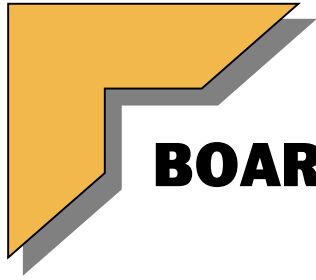
*Note: Unspent MERC contract dollars will be invested in agreed upon programs in FY 26*

Income Statement - Year to Date  
As of June 30, 2025

	Year To Date 06/30/2024	Year To Date 06/30/2025	Year Ending 06/30/2024	Year Ending 06/30/2025
	Actual (PYTD)	Actual YTD	Budget YTD	Actual (Prior Year)
				Revised Budget
<b>Revenue</b>				
City/County Lodging Tax (1%)	5,400,785	5,105,956	5,627,408	5,400,785
Tourism Improvement District (TID=2% + 1%)	17,525,506	17,317,898	17,908,639	17,525,506
MERC (OCC Contract)	5,364,500	5,477,000	5,444,448	5,364,500
Partnership Dues	210,742	147,237	194,513	210,742
Fees Earned & Other Income	1,267,416	719,545	658,511	1,267,416
EDA Grant	385,549	0	0	385,549
Regional RCTP (from Travel Oregon)	2,003,027	2,213,514	2,057,208	2,003,027
Cultural Tourism	253,458	240,813	273,756	253,458
Travel Oregon Grant	100,000	572,000	500,004	100,000
<b>Total Revenue</b>	<b>32,510,983</b>	<b>31,793,963</b>	<b>32,664,487</b>	<b>32,510,983</b>
<b>Expenses</b>				
Convention Sales Expenses	6,832,827	6,583,983	6,863,032	6,832,827
Research Expenses	464,335	604,462	693,467	464,335
Marketing Expenses	10,402,815	10,718,856	10,888,232	10,402,815
Convention Services	967,547	1,038,080	1,136,376	967,547
Events	575,801	605,172	619,392	575,801
International Tourism	1,679,432	1,638,827	1,799,652	1,679,432
Communications & PR	1,241,339	1,416,815	961,344	1,241,339
RCTP	1,913,661	2,213,539	2,057,232	1,913,661
Community Engagement	1,370,543	415,071	619,788	1,370,543
Destination Stewardship	0	1,585,087	1,916,880	0
Visitor Services	546,950	748,861	661,092	546,950
Strategy	0	30,921	0	0
Diversity, Equity & Inclusion	587,342	561,715	605,016	587,342
Administration	4,108,894	5,585,341	5,329,771	4,108,894
<b>Total Expenses</b>	<b>30,691,486</b>	<b>33,746,730</b>	<b>34,151,274</b>	<b>30,691,486</b>
<b>Total Net Surplus/(Deficit)</b>	<b>1,819,497</b>	<b>(1,952,767)</b>	<b>(1,486,787)</b>	<b>1,819,497</b>
				<b>(2,489,958)</b>

Balance Sheet  
Statement of Financial Position

	Period Ending	Year To Date		Prior Year To Date	
	05/31/2025	06/30/2025		06/30/2024	
	Prior Period YTD	Current YTD	Change MTM	Prior YTD	Change YOY
<b>Assets</b>					
Cash and Cash Equivalents	4,770,624	4,288,260	(11) %	5,961,045	(28) %
Investments	6,010,039	6,153,902	2 %	5,619,411	10 %
Accounts Receivable	2,773,271	1,625,921	(71) %	1,732,682	(6) %
Prepaid Assets	1,680,544	2,430,651	31 %	2,262,167	7 %
Fixed Assets, net	1,229,393	1,216,224	(1) %	1,560,000	(22) %
Other Assets	3,411,207	2,662,754	(28) %	3,707,510	(28) %
<b>Total Assets</b>	<b>19,875,078</b>	<b>18,377,712</b>	<b>(8) %</b>	<b>20,842,815</b>	<b>(12) %</b>
<b>Liabilities and Net Assets</b>					
Liabilities					
Accounts Payable & Accrued Expenses	4,501,605	5,109,845	12 %	5,413,982	(6) %
Accrued Personnel	3,758,441	3,180,943	(18) %	2,898,103	26 %
Deferred Revenue	190,263	159,221	(19) %	118,978	34 %
Other Fiduciary Liabilities - RCTP/RRSF	328,141	24,229	(1,254) %	555,512	(96) %
<b>Total Liabilities</b>	<b>8,778,450</b>	<b>8,937,916</b>	<b>2 %</b>	<b>8,986,575</b>	<b>(1) %</b>
<b>Net Assets</b>					
Undesignated	(7,474,908)	7,474,908	0 %	(5,655,410)	32 %
Board Designated	(4,381,333)	4,381,333	0 %	(4,381,333)	0 %
YTD Net Change	(759,613)	(1,952,766)	69 %	1,819,497	(233) %
<b>Total Net Assets</b>	<b>(11,096,628)</b>	<b>9,439,796</b>	<b>(18) %</b>	<b>(11,856,240)</b>	<b>(20) %</b>
<b>Total Liabilities and Net Assets</b>	<b>19,875,078</b>	<b>18,377,712</b>	<b>(8) %</b>	<b>20,842,815</b>	<b>(12) %</b>



# BOARD OF DIRECTORS

LAST NAME	FIRST NAME	COMPANY	OFFICERS	COMMITTEE CHAIR
Andrejic	Dragan	The Nines Hotel		
Boss	Dani	Holiday Inn Portland-Columbia Riverfront		
Bramlett	Tiquette	Our Legacy Harvested		
Brim-Edwards	Julia	Multnomah County		
Brown	Jeff	Hotel Eastlund		
Browne	Marie	The Ritz-Carlton Portland		
Burnett	Becky	Host2Host/Hive Hospitality		
Cairo	Michelle	Olympia Provisions		
Daley	Mike	PM Hotel Group		
Davis	Heather	Portland Timbers		
Faustin	Bertony	Abbey Creek Vineyard		
Hasan	Naim	Naim Hasan Photography @ N2H Media Group		Multicultural Tourism Advisory Committee
Hawkins	Rick	Geffen Mesher	Treasurer	Budget and Finance Committee
Huffman	Kurt	ChefStable	Chair-elect	
Lang	Brian	Hyatt Regency Portland at the Oregon Convention Center	Vice Chair	
Liu	Michael	Fubonn Shopping Center		
Lopuszynski	Ziggy	Crowne Plaza Portland - Downtown Convention Center		
Martinez	Martin	Orox Leather Co.		
McAllister	Martin	Portland Marriott Downtown Waterfront	Past Chair	Tourism Improvement District Committee
McLeod	Mike	Hilton Portland Downtown & The Duniway		
Patel	Ash	Canterbury Group, Inc.		
Patel	Katen	K10 Hotels, LLC	Chair	
Simpson	Ashton	Metro		
Stansbury	Todd	Enterprise Mobility		
Tigner	Ryan	iTrip Vacations Northwest		
Weston	Linda	Rapporto		Nominating Committee, Partner Services Committee
Weston	David	Doubletree by Hilton Hotel Portland		Convention Sales Steering Committee
Wilson	Keith	City of Portland		