

Metro Policy Advisory Committee (MPAC)

agenda

Wednesday, April 11, 2018 **5:00 PM** **Metro Regional Center, Council chamber**

- 1. Call To Order, Introductions, Chair Communications (5:00 PM)**
- 2. Public Communication on Agenda Items (5:05 PM)**
- 3. Council Update (5:10 PM)**
- 4. MPAC Member Communication (5:15 PM)**
- 5. Consent Agenda (5:20 PM)**
 - 5.1 Consideration of March 14, 2018 Minutes [18-4991](#)
Attachments: [March 14, 2018 Minutes](#)
- 6. Information/Discussion Items**
 - 6.1 Regional Housing Measure Update (5:20 PM) [COM](#)
[18-0113](#)

Presenter(s): Jes Larson, Metro
 Emily Lieb, Metro
 Andy Shaw, Metro

Attachments: [MPAC Worksheet](#)
 - 6.2 Trends Behind the Regional Population Forecast: Migration and Demographic Change (6:00 PM) [COM](#)
[18-0114](#)

Presenter(s): Anna Griffin, Oregon Public Broadcasting
 Sheila Martin, Portland State University
 Tom Potiowsky, Portland State University
 Bill Reid, PNW Economics

Attachments: [MPAC Worksheet](#)
 [Draft 2018-2038 Regional Forecast Quick Reference](#)
- 7. Adjourn (7:00 PM)**

Upcoming MPAC Meetings:

- *Wednesday, April 25, 2018*
- *Wednesday, May 9, 2018*
- *Wednesday, May 23, 2018*

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

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2018 MPAC Work Program

as of 3/16/2018

Items in italics are tentative

<p><u>Wednesday, March 28, 2018 – cancelled</u></p>	<p><u>Wednesday, April 11, 2018</u></p> <ul style="list-style-type: none"> • Regional Housing Measure: Possible Scenarios – Information/Discussion (TBD; 30 min) • Trends Behind the Regional Population Forecast: Migration and Demographic Change – Information/Discussion (TBD; 60 min)
<p><u>Wednesday, April 25, 2018</u></p> <ul style="list-style-type: none"> • Draft Freight Strategy – Information/Discussion (Tim Collins, Metro; 20 min) • Draft Safety Strategy – Information/Discussion (Lake McTighe, Metro; 30 min) • Employment Trends: Changes in How and Where People Work – Information/Discussion (panel TBD; 50 min) 	<p><u>Wednesday, May 9, 2018</u></p> <ul style="list-style-type: none"> • Food Scraps Policy Update – Information/Discussion (Jennifer Erickson, Metro; 20 min) • Regional Transit Strategy – Information/Discussion (Jamie Snook, Metro; 45 min) • Draft RTX Policies and Strategies – Information/Discussion (Eliot Rose, Metro; 40 min)
<p><u>Wednesday, May 23, 2018</u></p> <ul style="list-style-type: none"> • Regional Housing Measure: Draft Measure and Programs – Information/Discussion (TBD; 60 min) • Draft RTP (Focus on Policies and Implementation)– Information/Discussion (Ellis; 45 min) 	<p><u>Wednesday, June 13, 2018</u></p> <ul style="list-style-type: none"> • City Proposals for UGB Expansions – Information/Discussion (Representatives from 2-3 Cities; 90 min) • Regional Housing Measure Ballot Discussion – Recommendation (TBD: 20 min)
<p><u>Wednesday, June 27, 2018</u></p> <ul style="list-style-type: none"> • City Proposals for UGB Expansions – Information/Discussion (Representatives from 2-3 Cities; 90 min) • Report on RTP Performance (Round Two) – Information/Discussion (Ellis; 20 min) 	<p><u>Wednesday, July 11, 2018</u></p> <ul style="list-style-type: none"> • Overview of Draft 2018 Urban Growth Report – Information/Discussion (Ted Reid, Metro; 45 min)

<p><u>Wednesday, July 25, 2018</u></p> <ul style="list-style-type: none"> • Merits of City Proposals for UGB Expansions – Information/Discussion (TBD; 60 min) 	<p><u>Wednesday, September 12, 2018</u></p> <ul style="list-style-type: none"> • Metro Chief Operating Officer Recommendation on 2018 Urban Growth Management Decision – Information/Discussion (Martha Bennett, Metro; 60 min) • MPAC Recommendation to Metro Council on Urban Growth Management Decision – Recommendation to the Metro Council (Ted Reid, Metro; 30 min)
<p><u>Wednesday, September 26, 2018</u></p> <ul style="list-style-type: none"> • Introduce and Discuss MTAC Recommendation on 2018 RTP and Strategies for Freight, Transit, and Safety (Ellis; 90 min) <p><u>September 27-29</u>: League of Oregon Cities Annual Conference, Eugene, OR</p>	<p><u>Wednesday, October 10, 2018</u></p> <ul style="list-style-type: none"> • MPAC Recommendation to Metro Council on Adoption of 2018 RTP and Strategies for Freight, Transit, and Safety (Ellis; 60 min)
<p><u>Wednesday, October 24, 2018</u></p>	<p><u>Wednesday, November 14, 2018</u></p> <p><u>November 13-15</u>: Association of Oregon Counties Annual Conference, Eugene, OR</p>
<p><u>Wednesday, November 28, 2018</u></p>	<p><u>Wednesday, December 12, 2018</u></p>

METRO POLICY ADVISORY COMMITTEE (MPAC)

Meeting Minutes

March 14, 2018

Metro Regional Center, Council Chamber

MEMBERS PRESENT

Sam Chase
Betty Dominguez
Andy Duyck
Mark Gamba
Jeff Gudman
Linda Glover
Kathryn Harrington
Jerry Hinton
Gordon Hovies
Martha Schrader
Don Trotter
Mark Watson

AFFILIATION

Metro Council
Metro Council
Washington County
City of Milwaukie, Other Cities in Clackamas County
City of Lake Oswego, Largest City in Clackamas County
City of Vancouver
Metro Council
City of Gresham, Second Largest City in Multnomah County
Tualatin Fire and Rescue, Special Districts in Washington County
Clackamas County
Clackamas County Fire District #1, Special Districts in Clackamas County
Hillsboro School District Board of Directors, Governing Body of a School District

ALTERNATES PRESENT

Gretchen Buehner
Brian Cooper
Karen Emerson

John Griffiths
Linda Simmons

AFFILIATION

City of King City, Other Cities in Washington County
City of Fairview, Other Cities in Multnomah County
Tualatin-Tigard School District Board of Directors, Governing Body of a School District
Tualatin Hills Park & Recreation District
TriMet

MEMBERS EXCUSED

Denny Doyle (*Chair*)

AFFILIATION

City of Beaverton, Second Largest City in Washington County

OTHERS PRESENT: Adam Barber, Laura Weigel, Jennifer Hughes, Anna Slatinsky, Rich Swift

STAFF: Nellie Papsdorf, Ernest Hayes, Miranda Mishan, Kim Ellis, Elissa Gertler, Eliot Rose, Ted Reid

1. CALL TO ORDER, SELF INTRODUCTIONS, CHAIR COMMUNICATIONS

Chair Pro-tem Mark Gamba explained that in the absence of Chair Denny Doyle and Vice Chair Larry Morgan, he would be presiding over the meeting. Chair Pro-tem

Gamba asked MPAC for approval to continue as chair of the meeting, and approval was received.

Chair Pro-tem Gamba asked MPAC members, alternates and meeting attendees to introduce themselves. He welcomed new MPAC members.

Chair Pro-tem Gamba discussed the 2017 Compliance Report. He shared that per Metro Code, the Chief Operating Office was required to annually submit to the Metro Council the status of compliance by cities and counties with the requirements of Metro code Chapter 3.07, the Urban Growth Management Functional Plan, as well as Metro Code chapter 3.08, the Regional Transportation Function Plan. Chair Pro-tem Gamba explained that the Chief Operating Office submitted this report to the Council on March 1, and per the Metro Code, it needed to be submitted to MPAC and JPACT as an informal non-action item for review.

Chair Pro-tem Gamba shared that compliance with the UGMPP included meeting requirements for maintaining housing capacity; protecting water quality and flood management; protecting industrial land; planning for areas added to the Urban Growth Boundary; and protecting and enhancing fish and wildlife habitat. He conveyed that all jurisdictions were in compliance with the UGMFP.

Chair Pro-tem Gamba explained that compliance with the RTFP included meeting requirements for transportation system design; development and update of transportation system plans; transportation project development; regional parking management; and amendment of comprehensive plans. He shared that all jurisdictions were in compliance with the RTFP.

2. PUBLIC COMMUNICATIONS

There were none.

3. COUNCIL UPDATE

Councilor Sam Chase welcomed Councilor Betty Dominguez to the Metro Council, and announced the upcoming joint council meeting with the Tribal Council of the Confederated Tribes of Grand Ronde on March 22.

Councilor Chase reminded MPAC members about the stakeholder advisory committee discussions that were happening at Metro, and discussed the makeup of the committee and their current goals.

4. MPAC MEMBER COMMUNICATION

Commissioner Amanda Fritz highlighted that the Portland City Council was meeting to revise the Washington Park Master Plan on March 15th.

5. CONSENT AGENDA

No quorum.

6. INFORMATION/DISCUSSION ITEMS

6.1 2018 Urban Growth Management Decision: Process Update

Ms. Elissa Gertler, Metro's Director of Planning and Development reminded MPAC of the UGB review coming up this year. She shared that after today's presentation they were seeking feedback on the review process. Ms. Gertler added that the Metro Council had directed and overseen refinements to the implementation of growth and that today's presentation would cover the new system. She introduced Mr. Ted Reid, Metro's project manager for Urban Growth Management.

Key elements of the presentation included:

Mr. Reid explained that Metro Council was planning on making a decision on Urban Growth Management and was looking to MPAC to give a recommendation on this decision. He acknowledged that the council wanted this year's process to be different than in the past, and to move away from some of the past theoretical debates and move towards building housing to meet the needs of future residents of the region. Mr. Reid emphasized the need for the process to advance Metro's desired outcomes.

Mr. Reid recounted the timeline of the UGM process, and highlighted the improvements to the UGM process that had been made over the years with MPAC's recommendations. He discussed what was expected from cities asking for expansions, and how that had changed over time.

Mr. Reid noted that Metro had received five letters of interest for residential expansions, and that the next step was for those cities to submit full expansion proposals by the end of May. He shared that Metro staff intended to have MPAC focus on the merits of these proposals over the summer.

Mr. Reid conveyed that staff was doing analysis as required by state law to understand the land already within the UGB. He reminded MPAC that they would present all of that information in the urban growth report that would come out at the end of June. Mr. Reid explained that the Urban Growth Report accompanied by the proposals put forward by cities would be the basis of this summer's discussions.

Mr. Reid highlighted the peer review groups that would weigh in on the city proposals for expansions, and their role in the UGM process. He explained the makeup of the group, and shared that their role was to advise MPAC on the proposals made by cities, and whether or not the expansions should be approved.

Member discussion included:

- Chair Duyck raised concerns that MPAC members would not be allowed agency in decision making if the peer review group saw the proposals before MPAC. Mr. Reid explained that MPAC would hear directly from the cities as well.
- Ms. Gertler conveyed that CRAG would be doing strength and weakness evaluation, and they thought of it as stakeholder engagement. Councilor Kathryn Harrington clarified that the information from CRAG would come to MPAC, and that MPAC still had a very significant role in the process.
- Chair Duyck emphasized that he was concerned that another group in the process would add another layer of information which would complicate the process. Councilor Harrington shared that Metro's record for transparency was consistency good, and that information about the UGB process had always been made available. She emphasized that she was optimistic about the process. Ms. Gertler suggested Chair Duyck serve on CRAG.
- Mr. Don Trotter asked Mr. Reid to recount the five cities that had submitted proposals for expansion. Mr. Reid listed King City, Sherwood, Wilsonville, Beaverton ??
- Councilor Jerry Hinton asked how the expansion process factored into Damascus disincorporation. Mr. Reid shared that they were working off of decisions made by the Damascus City Council and the Metro Council at a joint meeting.
- Councilor Betty Dominguez expressed support for Councilor Harrington's comments regarding transparency in the UGB expansion process. She asked Mr. Reid if the affordability requirements in the cities proposals distinguished between housing for sale and multifamily rental housing. Mr. Reid shared that when cities made their full proposals they would provide more info. He reminded MPAC that one of the requirements for proposals was that cities had to provide a concept plan which would speak to housing needs and affordability.
- Councilor Dominguez asked if there was a difference between home ownership and rental opportunities. Mr. Reid shared that they could not zone for those distinctions, and the zoning would usually happen from market forces. Ms. Gertler added that land does not turn into development by itself.
- Councilor Gretchen Buehner asked if there would be an update on demographic forecasts, and when that could be expected. Mr. Reid shared that a peer review group of that forecast had been happening, and the update would be shared in the Urban Growth Report in the upcoming months. He explained that MPAC would have some discussion about the growth forecasts on April 11th, particularly the underlying trends that were pushing growth in various directions.
- Councilor Buehner suggested looking at proposals and doing evaluation on how many units could be fit in an acre, and deduce whether or not it might be rental or owned housing based on the density of the housing.

- Councilor Jeff Gudman shared that it would be helpful for MPAC to have data that showed the number of people per acre inside the UGB, and other densification trends.
- Councilor Harrington shared that Metro's urban reserves that should last for 40-50 years. Councilor Gudman emphasized that density information would be useful. Mr. Reid conveyed that sharing that information was required by state law and would be shared with MPAC.
- Chair Duyck raised concerns about the 50 year land supply, and explained that this was not a marker that had been achieved in spite of it being a goal. He shared that the amount of reserves that had been adopted was not what the state legislature showed and put into legislation.
- Mr. Mark Watson asked if the new process was because it was mid-cycle or because it was setting a precedent. Mr. Reid expressed that he hoped they were setting a precedent, and that they wanted an outcome based approach. Councilor Harrington added that a new process had been used each cycle.

6.2 Emerging Technology Strategy: Draft Policies

Chair Pro-tem Gamba highlighted some of the ways in which technology was changing transportation. He shared that Metro had been developing a strategy to help the region prepare for these, and introduced Mr. Eliot Rose, who was leading the technology strategy work.

Key elements of the presentation included:

Mr. Rose explained that he wanted to collect feedback on the draft policy language that was going to be at the heart of the technology strategy. He conveyed that there was a lot of potential in these developing technologies, and a lot of drawbacks. Mr. Rose recounted some of the challenges that were posed by emerging technologies, and emphasized that his work was not about deploying new technologies.

Mr. Rose highlighted the work that had been done so far in researching types of emerging technologies both within and outside the region. He highlighted feedback from Metro committees, county coordinating committees and one-on-one conversations with partners. Mr. Rose thanked agencies in the region for taking an early role in the process. He explained to MPAC what to expect in the upcoming months.

Mr. Rose shared that considering the long term impacts of new technologies was of high importance, and that he had been considering how these technologies would play out over time. He explained that congestion, pollution, land use and other Metro priorities would see significant impacts based on technology.

Mr. Rose recounted the policy framework including the principles, policies, strategies and actions. He discussed the elements of each section of the policy

framework, and explained the key areas that were emphasized in the RTX policy. Mr. Rose shared how key policy areas in the RTX policy aligned with those in the RTP.

Mr. Rose highlighted that implementation of the technology strategy was to come after the policy was drafted and feedback had been incorporated. He shared some of the implementation strategies that peer agencies were using to implement similar strategies.

Mr. Rose discussed the strategy development timeline for the upcoming year, and highlighted lessons learned from feedback on the draft policy language.

Member discussion included:

- Councilor Hinton suggested thinking about what the incorporation of Uber and Lyft would mean for infrastructure, the market, and personal use. He expressed appreciation for Mr. Rose's work, and emphasized the importance of talking about emerging technologies.
- Commissioner Amanda Fritz raised concerns that many of these new technologies were not in line with Metro's values, and many new technologies would only further contribute to congestion. She highlighted the need to think about equity and who would benefit from these technologies. Commissioner Fritz emphasized the need to figure out how to decrease the number of vehicles on the road.
- Councilor Dominguez emphasized that there were pros and cons to the technology conversation from an equity perspective, and that rides with Uber and Lyft were not affordable.
- Councilor Buehner highlighted the importance of accessibility, and noted that the population of the region was aging and there was a need for more services that were accessible. She suggested adding accessibility as a policy area for RTX.
- Chair Duyck expressed appreciation that Metro was embracing technology, because flexibility was important in order for people to get to work, given that transit did not reach all areas of the region.
- Mr. Rose conveyed that based on history, the easier it was to choose driving, more people would. He explained that this would make traffic more efficient but it would be multiple decades until those benefits were actualized.
- Councilor Gudman asked if Mr. Rose was anticipating a section on embedding the technology in infrastructure as a part of the policy area recommendations. Mr. Rose explained that one of the recommended actions was to increase our capacity to send information to and from the road side.

- Commissioner Fritz added that the public sector would be bearing the financial brunt of new technologies but only the private sector would benefit.
- Mr. John Griffiths suggested that autonomous vehicles could reduce traffic deaths and the surface area occupied by cars could be reduced and turned into pedestrian and bike use.
- Councilor Harrington referred to the benefits and challenges presented by Uber and Lyft specifically in the city of Portland. She recommended continuing positive forward momentum in engaging with technologies to allow benefits to reach as many people as possible.
- Chair Pro-tem Gamba highlighted that there was the need to be proactive on regulating new technologies, and to make all automated vehicles electric.
- Commissioner Fritz emphasized that engaging with new technologies that added more cars on the road showed a complete turn in Metro's policies.
- Chair Pro-tem Gamba noted that ideally bikes and pedestrians could move on greenways instead of freeways and roads with cars.

7. ACTION ITEMS

7.1 Regional Leadership Forum 4 Takeaways/Recommendations for Regining 2018 RTP Investment Priorities

Chair Pro-tem Gamba explained that staff was requesting that MPAC provide a recommendation to the Metro Council as the council considered which direction to give local jurisdictions as they refined the draft project lists for the 2018 Regional Transportation Plan.

Chair Pro-tem Gamba thanked Metro council for hosting the leadership forum and those who attended on March 2nd. He shared that the conversations they had at the forum, along with the key takeaways put together by Metro staff provided a basis for thoughtful dialogue at MPAC.

Chair Pro-tem Gamba conveyed that MPAC and JPACT's recommendations would go before the Metro Council the following week, and that local jurisdictions would have until the end of April to refine their draft project lists. He introduced Ms. Kim Ellis, Metro's RTP Project Manager.

Key elements of the presentation included:

Ms. Ellis recounted the current RTP progress and what had been done so far. She highlighted what had been learned at the most recent leadership forum and public

feedback over the past few months. Ms. Ellis emphasized safety, reliability and travel options as priority outcomes.

Ms. Ellis discussed key takeaways from the leadership forum and the starting points for project refinements. She explained that these takeaways were important in thinking about making requests from the public, and being responsive to public leaders.

Ms. Ellis described the recommendations that TPAC was making to JPACT, and asked for feedback from MPAC on these recommendations. She shared that TPAC had discussed the importance of jurisdictions summarizing their approach to the project list and what they took into consideration for the project adjustments.

Ms. Ellis provided an overview of how projects could be improved or refined, including adding projects to the constrained list with new funding, shift project timing, update descriptions and intent, and provide more specificity for a bundled project.

Ms. Ellis discussed the RTP project timeline and next steps through the end of the year. She shared their proposed recommendation to the Metro Council.

Member discussion included:

- Ms. Gertler explained that there was no need for an official motion on the recommendation.
- Councilor Jeff Gudman asked how many agencies and cities had not yet refined their projects. Ms. Ellis recalled that they were currently asking for direction to the cities and counties. She explained that jurisdictions submitted projects, they had evaluated, and were taking a second look.
- Chair Duyck asked how HB 2017 funding dovetailed into RTP projects. Ms. Ellis shared that these projects were focused on active transport and ITS investments. Ms. Gertler added that they had already started the refinement process and were waiting for recommendation.
- Chair Pro-tem Gamba explained where they were in the process. He shared that at the leadership forum he heard concerns that over time the region will see new needs come up that were not addressed by the projects, and the goals would not be met. Chair Pro-tem Gamba conveyed that his recommendation was to look at swapping the timeline on many projects with regional goals in mind. Ms. Ellis emphasized that they were aiming for a balanced plan.
- Chair Duyck raised concerns that funds collected from congestion pricing would not go back into the transportation system. Chair Pro-tem Gamba emphasized that congestion would not be reduced by additional highway lanes. Chair Duyck explained that he did not agree, and that building more roads where they were needed would be helpful, and that this was an option that had not been explored.
- Chair Pro-tem Gamba raised concerns that ODOT's current plan for congestion pricing required the funds raised to be spent on interstates, whereas true congestion pricing would allow for spending on the whole system.

- Ms. Gertler asked for confirmation from MPAC members that they approved the recommendation, and members at the table gave their approval.
- Commissioner Fritz asked if they could convey that they would not move forward with the RTP until they got closer to meeting designated goals. Ms. Gertler noted that MPAC could send a strong message to the Metro Council about what they would like to see from the RTP.
- Ms. Ellis highlighted that they had an obligation to finish the update by the end of the year, and that staff was looking at the project list to identify project refinements.
- Ms. Linda Simmons asked Commissioner Fritz about the fifty cent tax on Uber and Lyft rides in the City of Portland, and where the funds from that tax would be allocated. Commissioner Fritz explained that Commissioner Dan Saltzman had not yet shared that information with the council. Ms. Simmons highlighted that the importance of being clear about who was allocating the funds collected from a tariff and where they would be allocated.
- Councilor Harrington asked about dates for upcoming MPAC presentations on the RTP. Ms. Ellis shared that she would work on that. Councilor Harrington conveyed that she would like to have draft summary findings come back to MPAC before the public comment period.

8. ADJOURN

MPAC Chair Pro-tem Gamba adjourned the meeting at 7:02 PM.

Respectfully Submitted,



Miranda Mishan
Recording Secretary

ATTACHMENTS TO THE PUBLIC RECORD FOR THE MEETING OF MARCH 14, 2018

ITEM	DOCUMENT TYPE	DOC DATE	DOCUMENT DESCRIPTION	DOCUMENT NO.
1.0	Handout	3/1/2018	2017 Compliance Report	031418m-01
3.0	Handout	3/14/18	RTP Letter from Getting There Together Coalition	031418m-02
6.1	Handout	3/14/18	2018 UGM Decision Engagement and Process Timeline	031418m-03
6.1	Presentation	3/14/18	2018 Urban Growth Management Decision Process Update	031418m-04
6.2	Presentation	3/14/18	Emerging Technology Strategy: Draft Policies	03418m-05
6.3	Presentation	3/14/18	Refining RTP Investment Priorities	031418m-06

MPAC Worksheet

Agenda Item Title: Regional Housing Measure Update

Presenter: Jes Larson, Metro; Emily Lieb, Metro; Andy Shaw, Metro

Contact for this worksheet/presentation: Kate Fagerholm, 503-813-7529,
kate.fagerholm@oregonmetro.gov

Purpose/Objective

To provide an update on Metro's efforts with partners and the community to develop a draft framework for a potential regional affordable housing measure.

Action Requested/Outcome

No formal MPAC action requested. Staff looks forward to answering MPAC's questions about continuing work on the potential measure framework.

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

MPAC last received a presentation on the potential housing measure on Feb. 14, 2018. Since that time, Metro staff have undertaken a variety of activities to engage partners and the public in developing a potential framework for the measure. These include:

- Holding monthly meetings with a Stakeholder Advisory Table of elected leaders, community advocates and public and private housing practitioners, and a Technical Advisory Table of experts in affordable housing finance, development and operations.
 - The Stakeholder Advisory Table is identifying top values for developing the housing measure framework, while the Technical Advisory Table provides input on technical considerations and feasibility.
 - These committees work in tandem. Conversations at each inform the other. Two members serve as liaisons between the committees.
- Presenting to and hearing input from dozens of local elected leaders, jurisdiction staff and community groups around the region at public meetings and individual briefings
- Selecting five community partners to receive funding for engagement with impacted communities and renters around the region to understand their needs and interests in affordable housing. Staff are also preparing for additional general public engagement over the next month.
- Developing concepts to assess the potential effects of investment mixes (such as affordability levels and unit size). After discussions with the advisory tables, these are currently in refinement.
- Holding two affordable housing tours for Metro Councilors, staff and partners in Multnomah and Washington counties; a third is currently being planned in Clackamas County.
- Conducting additional research and analysis to understand the measure's potential feasibility and effects

Work is proceeding with the goal of informing a recommendation from the Metro Chief Operating Officer to the Metro Council in late May. The Metro Council would then make a decision about whether to refer a measure to the November 2018 ballot.

What packet material do you plan to include?

None.

(Must be provided 10 calendar days prior to the actual meeting for distribution)

MPAC Worksheet

Agenda Item Title: 2018 Urban Growth Management Decision: the trends behind regional population and employment growth

Presenter: Moderator: Anna Griffin, News Director, Oregon Public Broadcasting
Panelists: Sheila Martin, Director, PSU Institute of Portland Metropolitan Studies
Tom Potiowsky, Director, PSU Northwest Economic Research Center
Bill Reid, Principal, PNW Economics

Contact for this worksheet/presentation: Ted Reid, Metro Planning and Development

Purpose/Objective

Help prepare MPAC for its September 2018 recommendation to the Metro Council on its 2018 urban growth management decision.

Action Requested/Outcome

No action at this time. The desired outcome of this discussion is that MPAC becomes more familiar with the trends behind the current regional forecast, which will be documented in the 2018 Urban Growth Report, to be released in late June 2018.

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

The regional population and employment forecast is a primary component of the analysis that Metro and its partners produce to inform the Metro Council's urban growth management decisions.

MPAC last considered a regional forecast in the course of the 2015 urban growth management decision. Since that time, the Metro Council adopted the 2015 forecast and directed staff that it intended to make its next urban growth management decision in 2018. Making a growth management decision in 2018 requires an updated regional forecast. Metro staff facilitated a peer review of the new regional forecast.

Most of the participants in this panel discussion participated in the forecast peer review process. The moderated panel discussion is intended to illuminate some of the trends underlying the updated draft forecast, such as demographic changes, migration flows, and economic conditions after the Great Recession.

What packet material do you plan to include?

Draft 2018-2038 Regional Forecast Quick Reference.

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

Key Findings

- A panel of experts, economists, and demographers found the forecast to be reasonably sound.
- The Metro region has rebounded from the Great Recession.
- The region added 45,000 new residents last year (2016), equal to 1.9% APR. This is the fastest annual growth since the Great Recession.
- The tight labor market is leading to a Portland area unemployment rate below 4 percent (December 2017). Job growth has been robust since 2014.
- Strong regional growth has lifted employment back above the pre-recession employment peak.
- Going forward, both population and job growth are expected to continue at a moderated pace because the region is approaching its full potential and full employment.
- Longer-term, the region will continue to see relatively stronger population growth than U.S. trends as net in-migration is expected to add to regional population – averaging 1.0% APR, (784,000 more residents in 7-county Metropolitan Statistical Area (MSA) from 2015 - 2045)
- Job growth in the long-term is expected to trend with population, – averaging roughly the same 1.0% APR, (406,000 more jobs in 7-county MSA between 2015 and 2045)

State of the Region

Annual 7-county MSA Population and MSA Employment

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

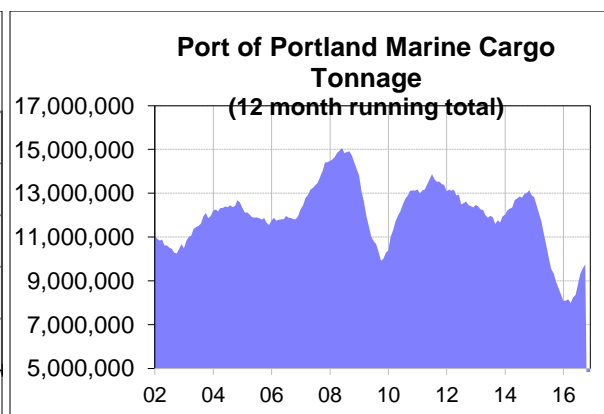
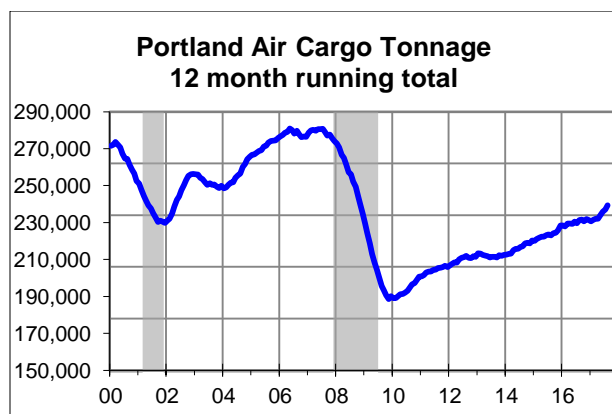
Source: PSU and BLS (annual growth rate in parenthesis)

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

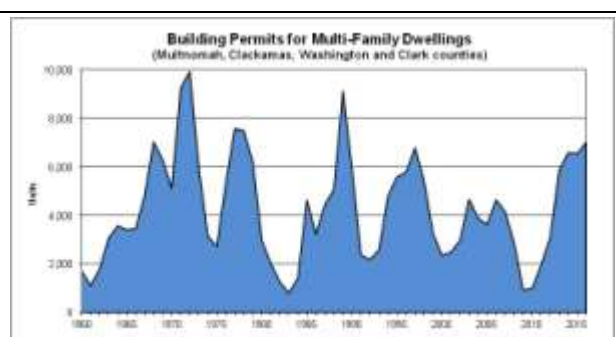
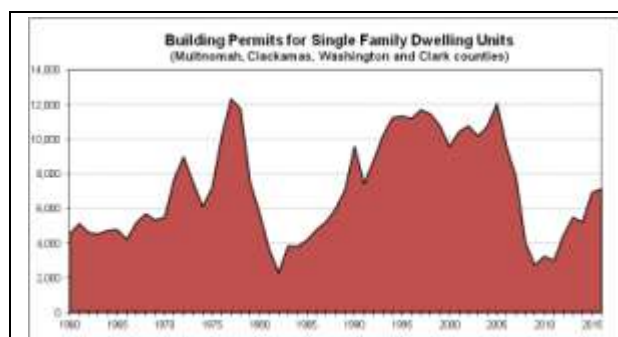


Sources: Regional Multiple Listing Service, Case-Schiller

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



Source: Port of Portland



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

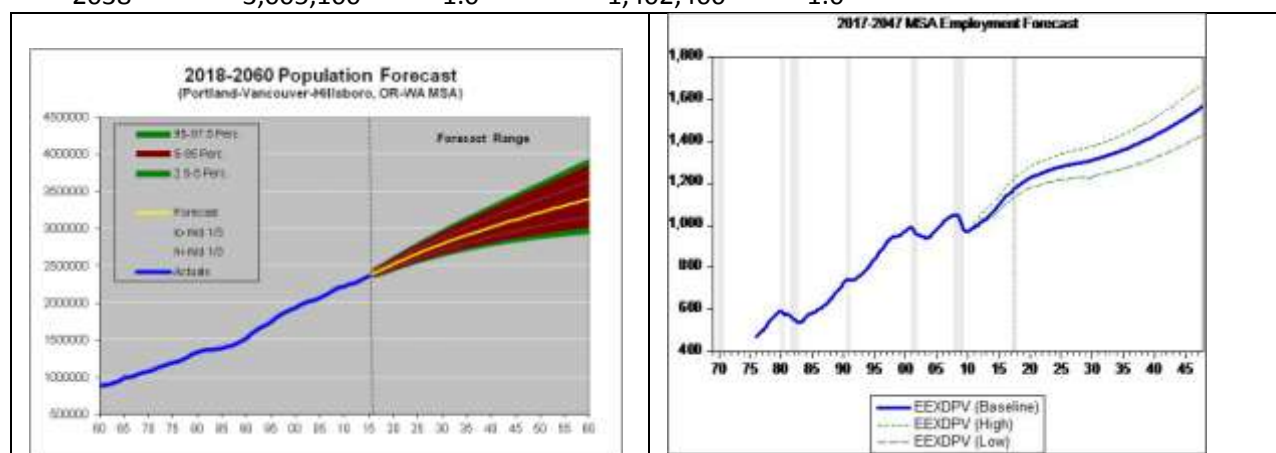
- ❖ Average Single-family permits issued in last 3 years = 6,400 units/yr; 20 year avg. = 8,050 units/yr
- ❖ Average Multifamily permits issued in last 3 years = 6,700 units/yr; 20 year avg. = 4,100 units/yr

Regional Forecast Summary

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

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

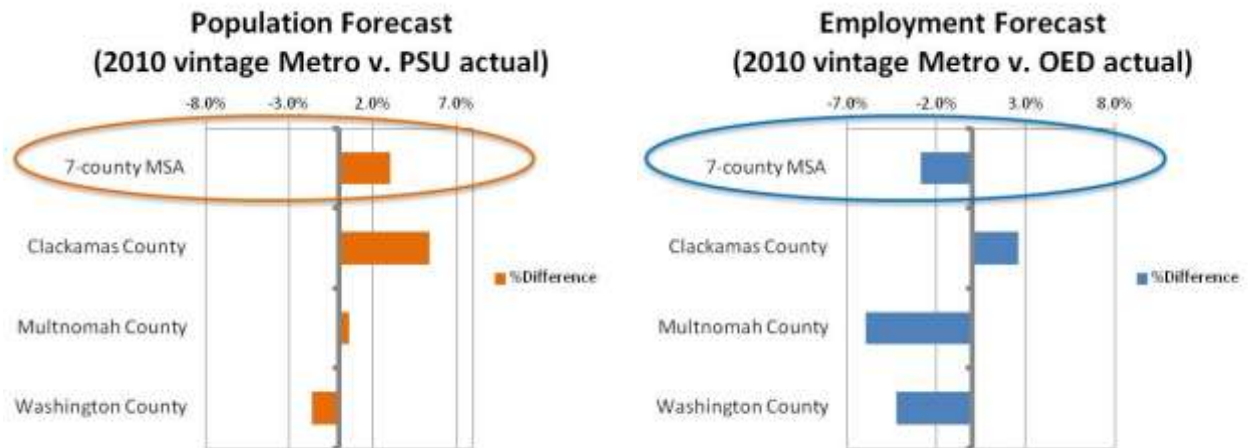
Year	Population	APR%	Employment	APR%
2015	2,362,655	1.6	1,111,900	3.3
2016	2,407,540	1.9	1,144,450	2.9
2017	2,443,900	1.5	1,169,300	2.2
2018	2,480,800	1.5	1,193,500	2.1
2019	2,513,500	1.3	1,214,250	1.7
2020	2,545,400	1.3	1,230,200	1.3
2038	3,005,100	1.0	1,402,400	1.0



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

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

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

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

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

