



Lane Transit District Strategic Planning Committee Agenda Packet

March Strategic Planning Committee Meeting

Tuesday, March 26, 2024

5:30 – 7:00 p.m.

The meeting will be held in-person, remotely and via broadcasting.

Address: 3500 E. 17th Avenue, Eugene OR 97401

Zoom: Stream live via link:

Broadcasting: Watch live on channel 21 or via link: <https://metrotv.ompnetwork.org/>

AGENDA ITEM

- 5:30 – 5:35 **I. CALL TO ORDER & ROLL CALL & INTRODUCTIONS:** Alma Hesus (Chair), Martin Gaiter (Vice Chair), Mike Eyster, Vidal Frances (ODOT), Greg Evans (Eugene city Councilor), Beth Blackwell (Springfield City Councilor), Heather Buch (Lane County Commissioner), Claire Syrett, Gino Grimaldi (Board member), Pete Knox (Board member)

- 5:35- 5:40 **II. ADJUSTMENTS TO THE AGENDA**

- 5:40 – 5:45 **III. PUBLIC COMMENT** – Public comment may be provided in writing to clerk@ltd.org, via Zoom, or in-person at the meeting.

- IV. CONSENT AGENDA**
 - a. none

- 5:45 – 6:45 **V. BUSINESS UPDATES, DISCUSSIONS, AND PRESENTATIONS**
 - a. **STRATEGIC PERFORMANCE RESULTS DISCUSSION**.....Aimee Reichert, Chief Performance Officer

 - b. **COMMUNITY OUTREACH AND COMMUNICATIONS ASSESSMENT UPDATE**.....InfraStrategies

 - c. **2023 ANNUAL BOARD RETREAT UPDATE**.....Tom Schwetz, Director of Planning and Policy

 - d. **ATTAIN GRANT UPDATE**.....Tom Schwetz, Director of Planning and Policy

 - e. **MOVING AHEAD UPDATE**.....Tom Schwetz, Director of Planning and Policy

6:45 – 6:50 **VI. OTHER BUSINESS**

- a. Items for review at future meeting.....Allie Brusasco, Board Administrator

6:50 **VII. ADJOURNMENT**

The facility used for this meeting is wheelchair accessible. To request a reasonable accommodation or interpreter, including alternative formats of printed materials, please contact LTD's Administration office no later than 48 hours prior to the meeting at 541-682-5555 (voice) or 7-1-1 (TTY through Oregon Relay).



Lane Transit District

Strategic Performance Results - Discussion

Presented by: Aimee Reichert, Chief Performance Officer

Lane Transit District’s (LTD) Strategic Business Plan guides work across the district through focused efforts on foundational, relational, and transformational work. Tactical work plans are continuously monitored to ensure work activities drive LTD toward desired outcomes in areas of Customer Satisfaction; Employee Engagement; Community Value; Financial Health; and Sustainability. Outcomes are monitored through Quarterly and Annual Key Performance Indicators, reported through LTD’s Performance Dashboard <https://www.ltd.org/Performance/>

The Board of Directors adopted LTD’s Strategic Business Plan in July 2021. Updates are provided to the board quarterly. Performance outcomes were last presented at the October 2023 Board of Directors. Since that time, LTD has produced 2 quarters of outcome measures, including newly introduced measures: Active Operators (Employee Engagement); Vehicle Revenue Hours (Community Value); and Job Connectivity (Community Value).

WORK PLAN UPDATES

PROJECT NAME	OWNER	STATUS	UPDATE DETAILS
Increase in revenue service levels by 10% over FY2023 baseline.	Joe McCormack	On track	83.72% (180) of operator goal (215) as of Feb 2024, ahead of schedule.
Implement communication process for public engagement.	Joe McCormack	On track	Communication Framework deliverable due for Board adoption by Spring 2024.
Develop a sustainable long-term financial model for LTD.	Jameson Auten	On track	FY24 Budget adherence on track. FY25 and Long-Range Financial Plan Development on track.
Develop Internal Strengths	Wendi Frisbie	On track	Internal communication upgrades underway; Major investments in leadership training and training program development.
Improve the perception of security of LTD services by 5%.	Cosette Rees	On track	Carry-on Policy active. Public Safety Officer recruitments active.



Lane Transit District Strategic Performance Results - Discussion

Report LTD outcomes in relation to community priorities.	Patrick Walsh	On track	LTD responding to community priorities related to housing and unhoused through multiple partnerships.
Implement strategy to community accountability.	Patrick Walsh	On track	Current tasks focused on engagement from neighborhood to federal level. Next major deliverable – report on priorities and actions in terms of key stakeholders.
Implement strategy for achieving Disadvantaged Business Enterprise Goal.	Wendi Frisbie	On track	DBE program fully assessed by Compliance Officer, with gap analysis called out in Triennial Review Submission.
Transition into the Lane County Mobility Manager by 2025. AKA Reimagine the Ride.	Joe McCormack	On track	Comprehensive Service Review and Ridesource Service Review on track.

DISCUSSION

Reference

What Does Accountability Mean for the Public Transportation Sector by Rashidi Barnes, from Public Transport

<https://aptapassengertransport.com/what-does-accountability-mean-for-the-public-transportation-sector/>

“Future accountability measures should consider the entire social ecosystem. Housing, lack of job centers, unneeded highway expansion projects, increased crime, work-from-home policies, and increased homelessness are all critical social components that impact how the entire transportation network is effective.” – Rashidi Barnes, CEO, Eastern Contra Costa Transit Authority

LTD has identified the following social imperatives as critical in our community: Housing, Unhoused, Workforce & Economic Development, Healthcare, and Education. Current efforts are highly focused in on the unhoused community through partnership with Sarah Koski, Homelessness & Community Resource Liaison. As this work develops, what are the measurable outcomes indicating strategic progress?

What Does Accountability Mean for the Public Transportation Sector?

By Rashidi Barnes | 3/7/2024

Share    

RASHIDI BARNES
Chief Executive Officer
Eastern Contra Costa Transit Authority / Tri Delta Transit
Antioch, CA



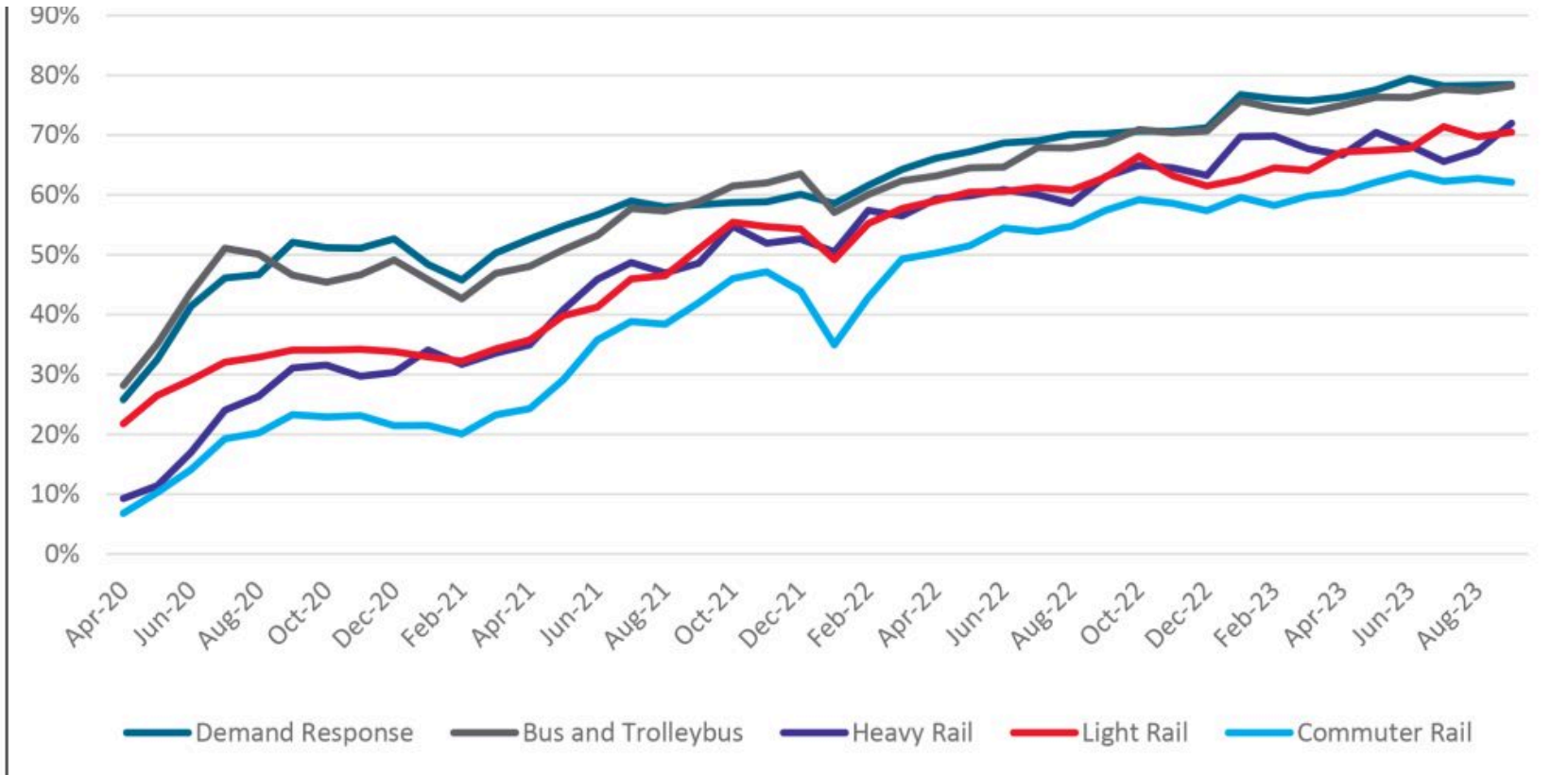
As some public transit agencies nationwide face fiscal cliffs, we find ourselves pitted against a familiar challenge: *accountability measures*. For decades, key performance indicators (KPIs) determined whether or not an agency was efficient and practical. KPIs, like on-time performance and how many passengers per hour we transported, were the accountability metrics that each agency focused on. As we crawl out of the pandemic ridership devastation, advocates, stakeholders, and politicians are asking for new accountability measures if public transit agencies want future operational funding to sustain their current service offerings and avoid the fiscal cliff.

I agree that public transit agencies are stewards of public funds. I also concede that the past KPIs needed to be updated because they did not tell the real story about service efficiency. Putting

CONFIDENTIAL

A recent APTA report stated: “In the fall of 2023, public transit ridership began to increase again. In September 2023, ridership rose to 74 percent of 2019 levels. In October and November 2023, APTA’s Ridership Trends Dashboard finds that U.S. public transportation ridership has fluctuated between 75 and 77 percent of 2019 levels when comparing the same week in each year.”

Even as the country implemented inconsistent return-to-work policies, these national ridership recovery strides were accomplished, and we still see office occupancy rates that remain around 50 percent, an increase in inflation levels, etc.—all social factors outside our industry’s control that play a factor in reaching or exceeding performance metrics. The following chart from a recent APTA Policy Brief shows the ridership recovery.



In light of those social factors mentioned above, nationally, public transit has been asked to do more with the same level of operational funding that has supported our industry for years. To steal a phrase from Bill Churchill (general manager of County Connection), “Public transit agencies are capital rich but operational poor.” The federal government provides millions of dollars to buy new vehicles, but, until recently, rarely provided funding for the operations. This limits agencies’ ability to expand, increase service frequency, and become a flexible system to meet today’s riders’ needs.

turning by roughly \$500 million.

The recently completed, “2023 Study Delegation of San Francisco Bay Area Transit Professionals to Switzerland” Joint Final Report talks about how one country over many years reformed its transit in a complex environment to improve the customer experience and increase ridership—including addressing accountability. “In Switzerland, transit service is plentiful and connects the country’s nine million residents with “clock face” coordinated timetables and integrated fares. Nationwide, travelers complete more than 21 percent of their trips on transit, and more than 50 percent of commuters in the country’s largest cities choose transit, with the 1.6 million residents of the Zurich metro area boasting an amazing 32 percent transit mode share overall.”^[1] This is archived through coordinating 260 operators, precisely 37 in Zurich (the San Francisco Bay Area has 27).

However, Switzerland has been able to achieve these service highs because of a few key factors:

- Public transit priority was given over private vehicles—“Switzerland’s trams and buses offer fast, reliable service due to dedicated lanes and signal priority, in combination with other policies that restrict driving in central areas.”^[2]
- The Swiss government has invested in capital and operations of transportation agencies based on a coordinated long-range service vision.
- In 1982, a sizable successful measure was passed that focused on increasing investments to meet ridership goals. “National and local transit funding measures have passed consistently since then and have led to higher frequency service throughout the system...”^[3]
- Financial investments in public transit have led to voter confidence, which has consistently approved more public investments, equating to a 75 percent increase in service levels in the Zurich region.
- Successful collaboration between the regions and operators.

Back in the U.S., collaboration at a micro level is essential, but to make real strides, collaboration on a macro level will move the needle. That includes cities, counties, transit agencies, and regional planning organizations agreeing on a long-term synced vision if a region’s economic, housing, environmental, and transportation goals are to be met. Most agencies need an active seat at the table to support new land use policies or to be consulted by cities as housing and or economic plans are established. However, we continue to move millions of students, seniors, veterans, and disabled individuals daily across the nation despite fully understanding these outside influence societal factors.

transportation, it's a social activity, if you think about it," says Megan Latslaw, associate professor in the Department of Environmental Health and Engineering at the Johns Hopkins Bloomberg School of Public Health.[4]

Future accountability measures should consider the entire social ecosystem. Housing, lack of job centers, unneeded highway expansion projects, increased crime, work-from-home policies, and increased homelessness are all critical social components that impact how the entire transportation network is effective.

Efficiency should not be confused with effectiveness. Therefore, public transit accountabilities should reflect what we want from transit as a societal result. Historically, accountability measures have been focused on efficiency rather than effectiveness. In today's world, effectiveness requires a clear vision that more than public transit buys into. Accountability requires each societal pillar to come to the table for the common good and not pitting against each other for political theatre.

We in public transit should embrace this, with the help of our regional partners, to develop these new accountability measures in hopes of provoking sustainable public support to surpass a region's economic, housing, environmental, and transportation goals.

[1] <https://mtc.legistar.com/View.ashx?M=F&ID=12591847&GUID=8C17916B-F1F9-4598-A336-90389AFFF8DF>

[2] <https://mtc.legistar.com/View.ashx?M=F&ID=12591847&GUID=8C17916B-F1F9-4598-A336-90389AFFF8DF>

[3] <https://mtc.legistar.com/View.ashx?M=F&ID=12591847&GUID=8C17916B-F1F9-4598-A336-90389AFFF8DF>

[4] <https://www.planetizen.com/news/2024/01/127199-transportation-access-public-health-issue>

Related Content



Lane Transit District Community Outreach and Communications Assessment Update

Presented by: InfraStrategies

Representatives from InfraStrategies will present on results from the Community Steering Council (CSC) meetings, survey and interviews. Using input from the CSC, survey, interviews and upcoming roundtable discussion, the goal for the Community Outreach Communications Assessment is to use the information gathered to develop and implement a consistent communication framework for Lane Transit District.

COMMUNITY OUTREACH AND COMMUNICATIONS ASSESSMENT (COCA)

Strategic Planning Committee
March 26, 2024



What is COCA?

- An assessment to determine what LTD can do to better engage and collaborate with the community
- The product of the assessment is a Community Outreach Framework.
- The framework will serve as a foundational guide for how LTD staff (and its consultants) works alongside the public on projects and other LTD initiatives.



Best Practice Research

Public Survey Results

60% of survey respondents have never given feedback or input on any recent LTD project.

- 65% of survey respondents were not aware of any LTD projects.
- 30% did not know how to give feedback.
- 20% did not think their feedback would make a difference.

Most Preferred Engagement Methods	
Getting input on critical issue	Short, easy surveys Virtual online meetings Flyers/mailers with critical info In person open house
Staying up-to-date	Reading social media posts Receiving quarterly email newsletters Receiving UMO push notifications Informational messaging at stations/vehicles
Staying involved throughout	Receiving frequent and consistent updates on progress
Participating in events	More virtual and online events Meetings and events on weekends

Background Interview Findings

- There is overwhelming belief among stakeholders that LTD needs to first focus on developing and communicating the problem(s) that LTD is trying to address before proposing solutions.
- There is a desire for the Board to play a larger role in community engagement, and more actively and visibly be out in the community.
- Given the funding sources of LTD, the business community feels they should have a bigger say in transit planning decisions. Care is needed to avoid a narrow conversation focused solely on the financial return businesses get in exchange for their contribution.
- LTD can do more to boost its boosters and build a coalition of supporters that can be strategically leaned on to help advance some of its priorities.

Ad Hoc Community Steering Council (CSC)

- First-of-its-kind ad hoc Community Steering Council charged with providing input, advice, and recommendations to LTD
- Invited members of the public to apply to be on the CSC
- Curated a group of 20+ people to be as representative as possible of the community
- Provided stipends based on attendance
- Convened six meetings from September to December

Community Steering Council (CSC) Inputs

- Transportation and mobility priorities
- Guiding principles for community engagement
- LTD's stakeholders and their varying needs
- Strategies and tactics for engagement
- Priorities and tradeoffs for engagement

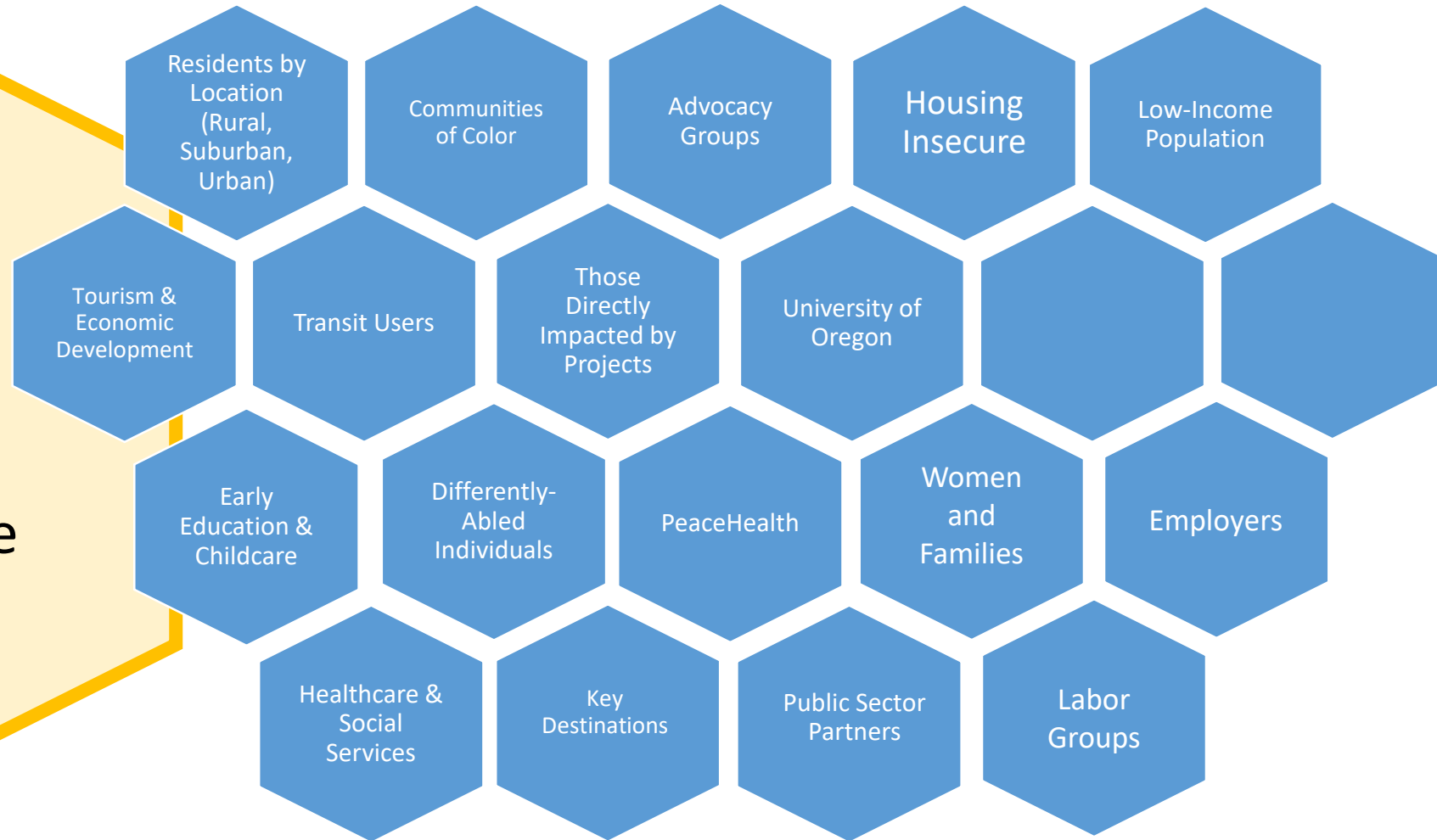
Draft Guiding Principles for Community Engagement

STYLE: The approach LTD uses to engage with the public	CONTENT: The type of information provided to the public	PROCESS: The methodology used in public engagement	INTENT: The goals of public engagement
Two-Way Dialogue	Data-Driven	Feedback Loop	Meaningful
Accessible	Clarity of Purpose	Continuous Improvement	Community-First Mentality
Respectful	Fiscal Transparency	Adaptable	
Active Listening	Outcome Oriented		



LTD's Stakeholders & Their Varying Needs

Stakeholders are the individuals, groups, organizations, and partners that have a vested interest in Lane Transit District



Emerging Strategies & Tactics for Engagement

- Work to build trust with the community at all times, not just when there is a project on tap
- Partner with existing organizations to build trust within communities
- Focus on existing riders, meeting them where they are and working to improve their experience
- Anticipate potential opposition and engage them early
- Follow up after interactions to demonstrate how LTD is incorporating feedback
- Don't shy away from hard truths
- Be upfront about what the real boundaries and limitations are that the public has to operate in

Strategies

Focus
on Riders

Engage in Collaborative
and Honest Conversations

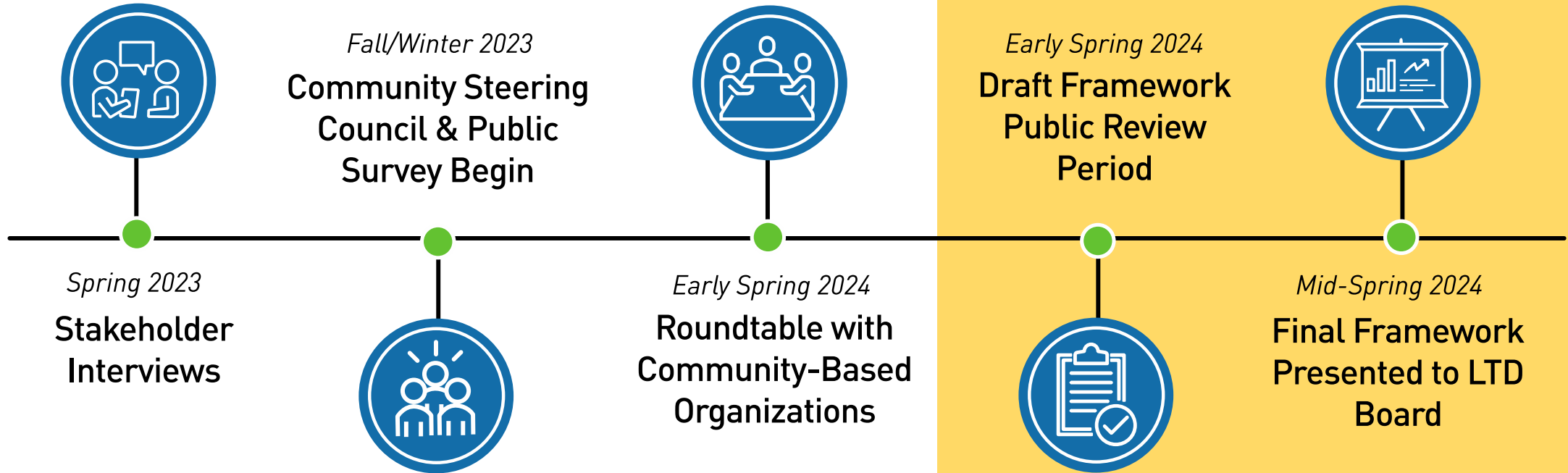
Communicate Clearly
What People Need to Hear

Work to Build Trust

Strategy/Tactic Prioritization

1. Engage Government Stakeholders
2. Get Out Ahead of the Story
3. Be Present with Riders
4. Engage Potential Opposition

Next Steps





Questions?



Lane Transit District 2023 Annual Board Retreat Update

Presented By: Tom Schwetz, Director of Mobility Planning and Policy

On November 29, 2023, the Lane Transit District Board of Directors held its annual Board Retreat. This presentation will highlight the key focus areas, provide an overview of the thoughtful and engaged conversations with community partners that were present, and discuss the District's path forward.

The Board Retreat agenda was structured to facilitate discussion by the Board and between the board and community leaders around community needs and priorities in the context of LTD's emerging role as the region's Mobility Manager. This conversation led to discussion on how LTD's path forward in taking on the role of the region's mobility manager can be focused to meet these broader community needs and priorities.

SPC was provided with an overview of the board retreat to be held the day after the SPC meeting. Staff described how LTD was moving from its current state to a position of facilitating and coordinating broader mobility options for the region. SPC members framed a core question as "what does the community need LTD to be?"

The committee discussed the first-order need of community members as being "economic mobility" (access to their lives), and that this could be accomplished by improving access to LTD's fixed-route services. Citing the hospital closure in Eugene, it was noted that there would be reduced access to medical services for many outlying parts of the region. In the context of "making the healthy choice the easy choice", the committee discussed the importance of making last-mile mobility "the easy choice", a choice that is safe and interconnected.

Members discussed how Eugene, Springfield, and Lane County are different places than they were 50 years ago, and that we are operating transit using an outdated "hub and spoke" network. In this context, committee members noted that there is a need to rethink the point of entry into the regional system and reorient the services to where people want and need to go.

Acknowledging that the model for transit operations needs to be updated, staff noted that, currently, "transit is hard" - you really have to want or need to ride it. To make transit more useful, the outcomes produced by transit (not just ridership) need to be aligned with the desired outcomes of our community. The strategic question becomes "how does LTD tie into the desired outcomes of the community?"

Staff noted that, moving forward, LTD's fixed route system is the foundation for a broader mobility framework for the region, and that we will need to develop trust and transparency with the community as LTD begins to build that broader mobility framework.

This agenda item provides an overview of the board retreat held on November 27, 2023. Attachment 1 provides a summary of the Board Retreat. Attachments 2-4 provide key materials from the Retreat.



Lane Transit District 2023 Annual Board Retreat Update

Supporting documentation:

- Attachment 1 - Summary of November 29, 2023 Board Retreat
- Attachment 2 – LTD Mobility Management – Cityfi
- Attachment 3 – Mobility Management Innovations – InfraStrategies
- Attachment 4 – State-Lane County Economic Outlook

Attachment 1: Summary of November 29, 2024 Board Retreat

On November 29, 2023, the Lane Transit District Board of Directors held its annual Board Retreat. This Attachment summarizes the key focus areas, provides an overview of the thoughtful and engaged conversations with community partners that were present, and discusses the District's path forward.

Range of Possibilities

Karina Ricks with CityFi provided an overview of Mobility Management asking, "what are we trying to solve for in the implementation of mobility management?" She provided the group with a definition of "transportation insecurity", saying that this is "a condition in which one is unable to regularly move from place to place in a safe and timely manner because one lacks the material, economic, or social resources necessary for transportation."

She indicated that, ultimately, our focus on facilitating transportation mobility should be to assist our community members in their "economic mobility". In that context, mobility management organizes and aligns various forms of mobility (including fixed-route transit) into a "coherent and interrelated system of mobility options". Karina encouraged the group to identify "Big Hairy Audacious Goals"- goals that were bold (but achievable), visionary, and transformative; noting that this is not an effort to try and solve for a "better bus".

Joshua Shank with InfraStrategies provided an overview of the role that active pilot programs can play in the development of a region's mobility management system. Speaking from his experience leading the development of LA Metro's mobility management program, Joshua highlighted three key takeaways:

1. The world has changed, so must we;
2. Partnerships with the private sector are crucial, innovation is the strength of the private sector not the public sector; and
3. An active pilot program is essential - trying new things is the only way to see what works for a given region.

Joshua described several mechanisms used by LA Metro in developing and managing its pilot programs. These included:

- Unsolicited Proposal
- Request for Information
- Proof of Concept
- Industry Forum
- Employee Ideas

It was through the use of these mechanisms that LA Metro has been able to pilot and then operationalize a number of mobility management tools including:

- Dodger Stadium Gondola - building a gondola connecting the Los Angeles Train Station to Dodger Stadium (in development).
- Automated Bus Lane Enforcement
- A mobility wallet providing low income users with access to various forms of mobility
- NaviLens - technology for the visually impaired providing travel directions and navigation assistance (<https://www.navilens.com/en/>)
- Bus speed Monitoring

Community Outcomes Facilitated Discussion

Several community leaders joined the board to discuss building or focused partnerships and collaborations. Key questions posed to the Board and community leaders included:

- How do your priorities as a board member align with the priorities of the community?
- What opportunities are available for LTD to collaborate with community organizations to drive workforce development?
- And economic development?

In support of these discussions, contextual information was provided by staff, and a report from Henry Fields with the Oregon Office of Economics. These materials are attached.

Jameson introduced the group's discussion noting that when people ask him about transit it is usually around how much ridership the system is experiencing. Building on the presentations by Karina and Joshua, he asked the group to consider how we think about the outcomes provided through transit service, and how they can be strengthened through partnerships and collaboration by aligning around broader community outcomes such as workforce and housing development. He asked the group to discuss their priorities.

Community leaders and board members discussed a number of regional development priorities in which LTD is engaged as a key partner. These include:

- Low income housing development in Cottage Grove where LTD will be able to provide both fixed route and mobility on demand services;
- Redevelopment of Springfield's Glenwood area targeting mixed-use development of housing and employment that will be able to leverage LTD's EmX system;
- LCC's focus on workforce development and how LTD provides critical access to both education and jobs;

Dan Whalen (Staff to Representative Hoyle) encouraged the group to continue to coordinate regional priorities for federal funding through efforts like the United Front, highlighting the success the region has had in leveraging collective action. Sarah Medary (Eugene City Manager) noted that, in the context of the range of issues facing the region, it will be important to think differently around how LTD might provide solutions. In this context it was noted that in the longer frame, workforce development is economic development; and that transit and a broader mobility framework will be critical to the success of both efforts.

For the remainder of the retreat, the board focused on what LTD might look like over the next 50 years. This conversation is framed both by the question of what our community needs/wants us to be? And what LTD is allowed to be under ORS 269. Broad success outcomes were articulated in terms of the following:

- Customer Satisfaction
- Community Value
- Employee Engagement
- Financial Health
- Sustainability

Based on the day's conversation, a broad objective in the district's evolution as a mobility manager was to create a "legible system of mobility," that provided the ability to get from point A to point B with the least friction. The board discussed what an active piloting program would look like. Broadly, it was suggested that the piloting program include efforts that might be considered "easy wins" as well as piloting that would stretch our abilities. The board made several suggestions including:

- Piloting a service that provides shift workers (early morning and late evening) with an option to commute using a form of mobility on demand.
- A pilot that would facilitate a "complete trip - one making use of broader mobility tools making connections to LTD's fixed route services.
- Developing pilots that would target specific populations. For example, pallets that might provide solutions to in a job; or analyzing the needs of Spanish-speaking women in the workforce.
- Use the ALICE report for Lane County to determine mobility needs for these individuals and develop pilots to serve those needs.

Mobility Management: Centering on People

Transportation Mobility for Social Mobility






Commuter time is the single strongest factor in the odds of escaping poverty.

“The Impacts of Neighborhoods on Intergenerational Mobility”
Raj Chetty and Nathaniel Hendren, Harvard University, April 2015.

Transportation Insecurity

“A condition in which one is unable to regularly move from place to place in a safe and timely manner because one lacks the material, economic or social resources necessary for transportation.”



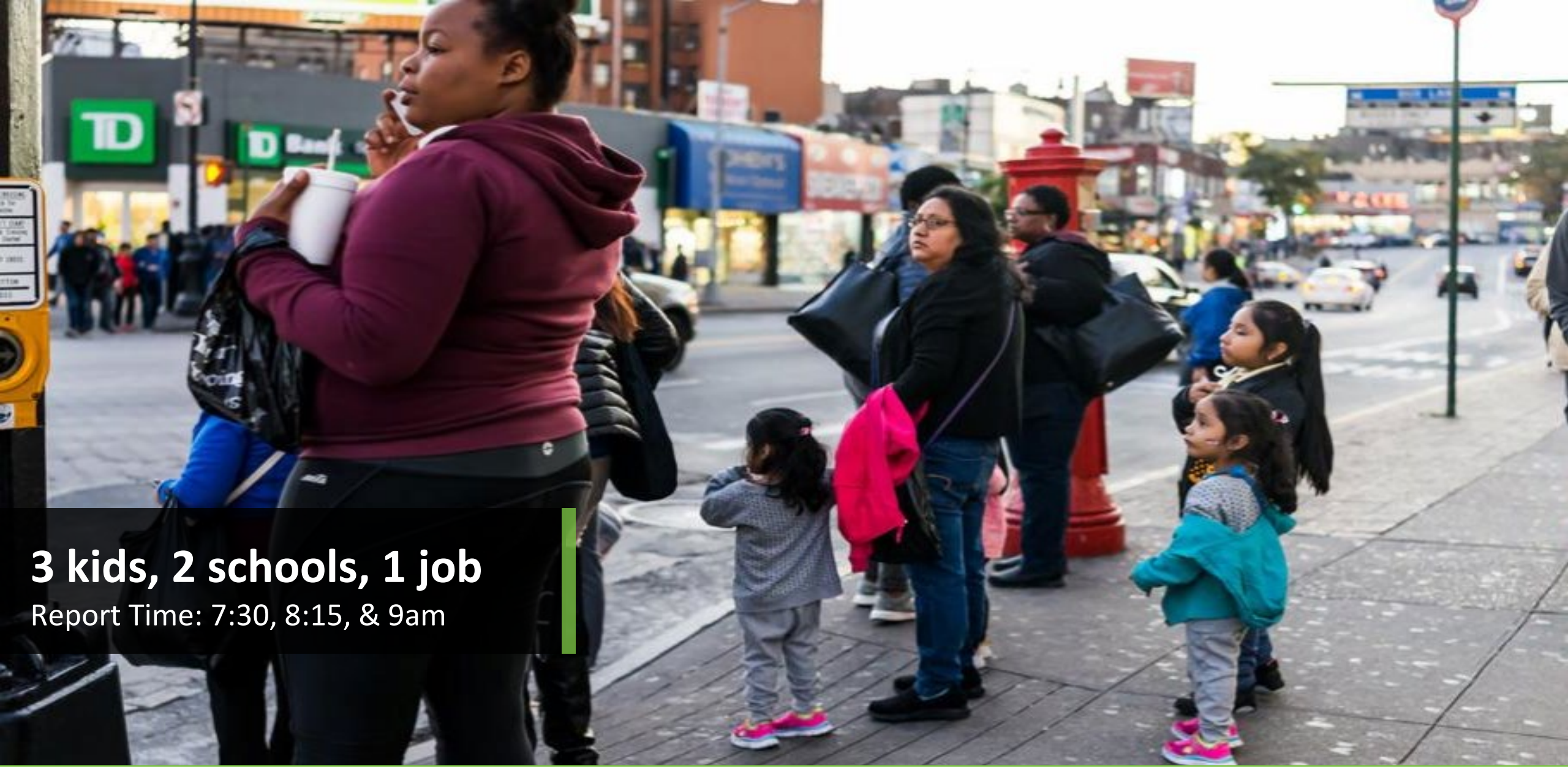
Transit is the backbone of any sustainable public mobility system....

...but sometimes, not enough for transportation security and economic mobility.



Construction Crew

Report Time: 5am



3 kids, 2 schools, 1 job

Report Time: 7:30, 8:15, & 9am





Working the 3rd Shift

Shift End: 3:30 am





**Family, appointments
and life**



Responsiveness



Redundancy



Respect



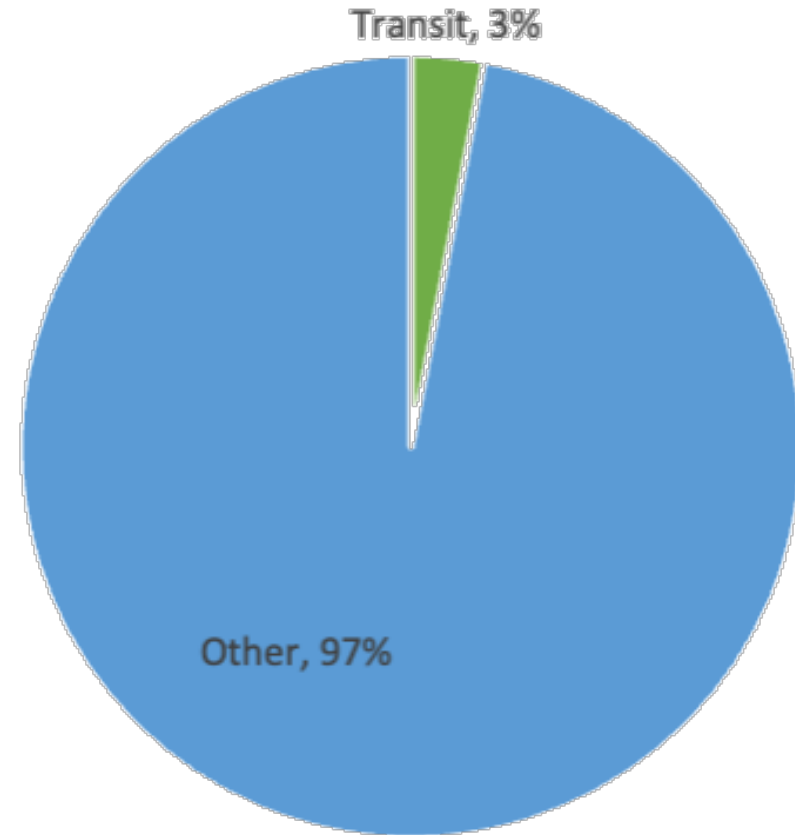
Resiliency



Mobility is Precarious

Where are we now?

- Transit captures roughly 3% of all household trips
 - Double the national average
 - Well short of regional need



Can we craft a

BIG, HAIRY AUDACIOUS GOAL

for mobility in Lane Transit District?

BHAGs are BOLD (but achievable)



U.S. Space Program (1960)

Land a man on the moon and bring him safely back.



Microsoft (1980)

A computer in every home on every desk.



Tesla (2000)

Make electric cars the envy of the luxury auto world.



MasterCard (2010)

Kill cash.

BHAGs are Visionary

“If I had asked people what they wanted, they would have said ‘a faster horse.’”

- Henry Ford (?)



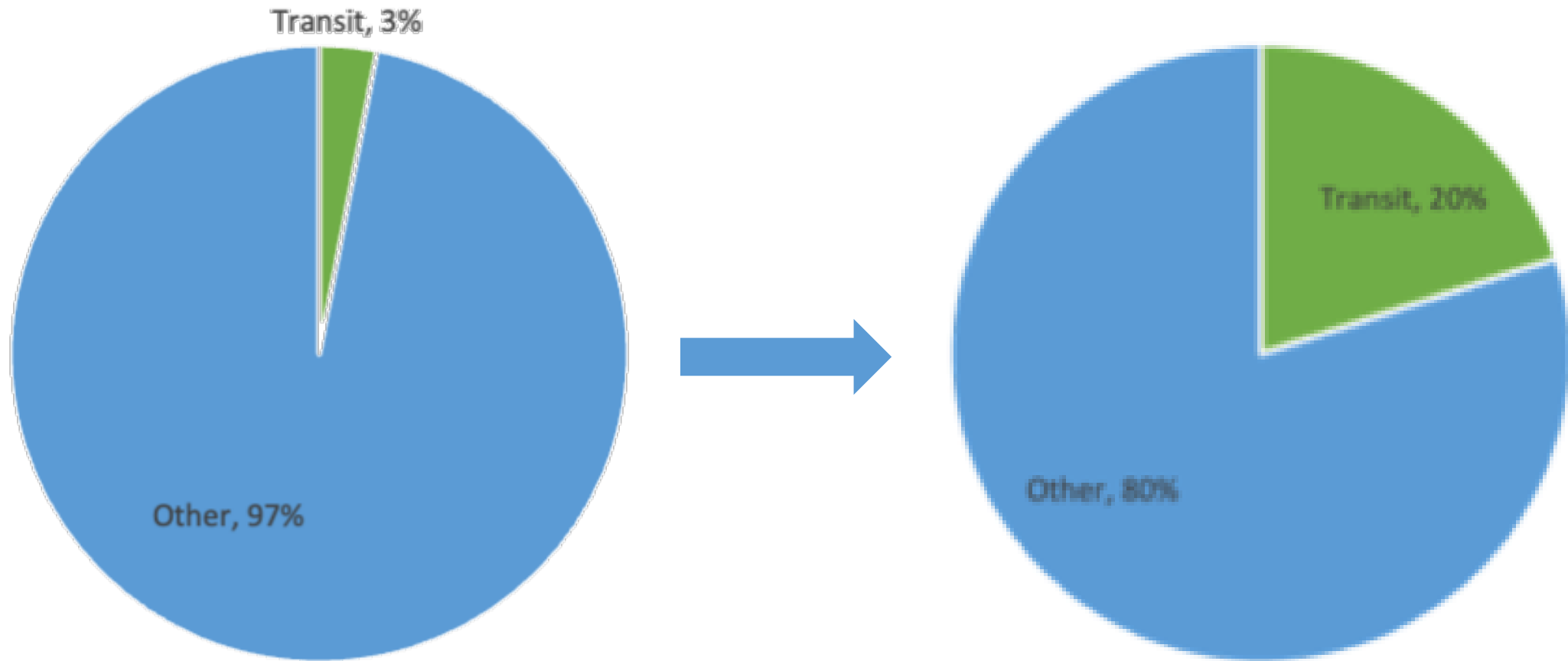
BHAGs are Transformative

“People don’t know what they want until you show it to them.”

- Steve Jobs



What is LTD's mobility BHAG?



Options have grown...



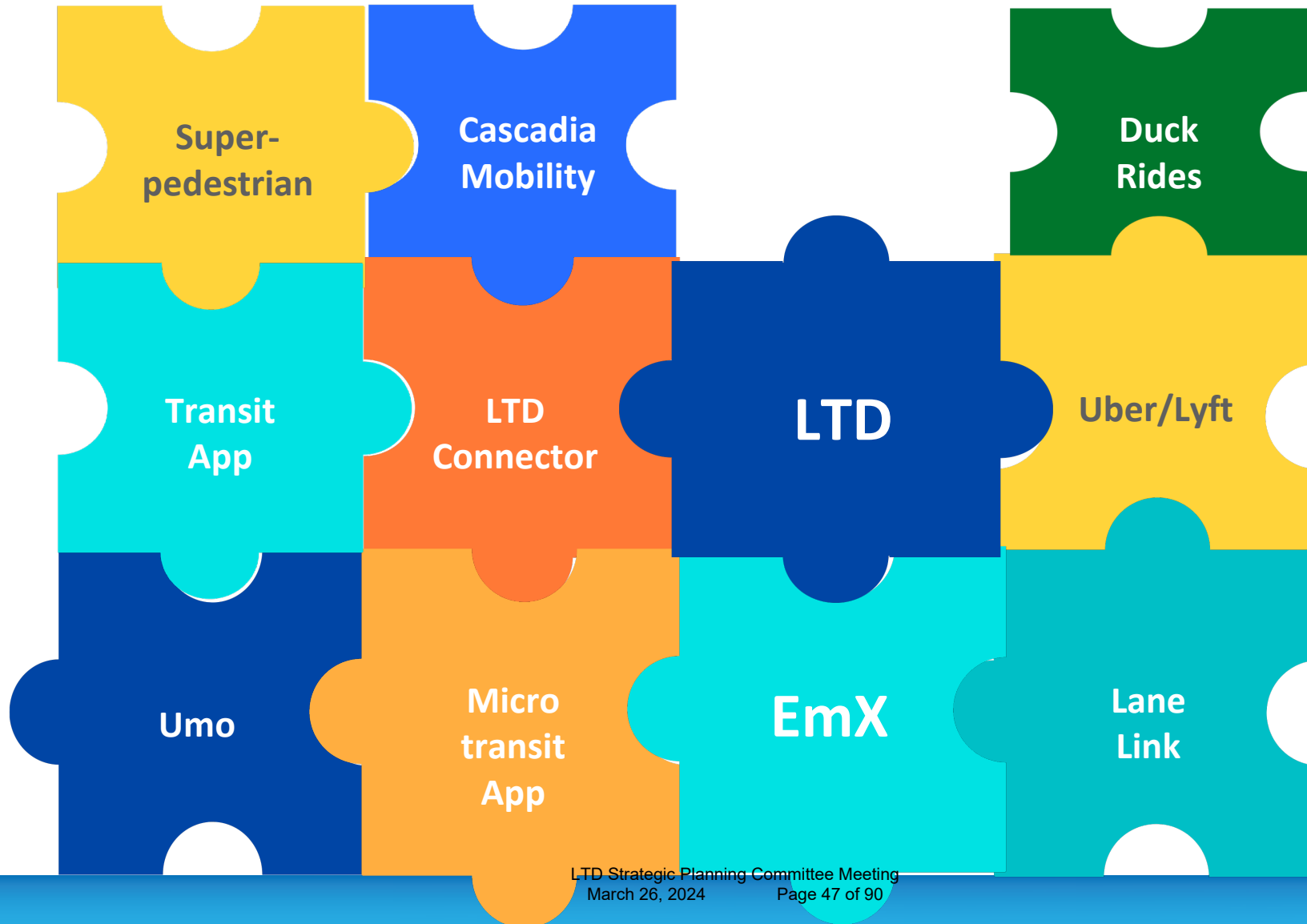
...so has complexity.



Opportunities abound...



Mobility management organizes and aligns.



Tools for Innovation at Transit Agencies

LTD Board Retreat | November 29, 2023 | Joshua Schank, InfraStrategies



Lane Transit District



Mechanisms for Innovation

Joshua Schank, InfraStrategies LLC

Presentation Structure

- Why Innovation?
- Mechanisms to Consider
- Example Projects
- Discussion

Why Innovation?

- If the existing actions are not getting you where you want to go, it is important to try new things
- A strength of the private sector is innovation, making opening a portal to their ideas is critical
- The world has changed and so must we

Mechanisms to Consider

- Unsolicited Proposal Process
- Request for Information
- Proof of Concept
- Industry Forum
- Employee Ideas

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- Request for Information
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Mechanisms to Consider

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Mechanisms to Consider

- Unsolicited Proposal Process
- Request for Information
- Proof of Concept
- Industry Forum
- **Employee Ideas**

Example Projects

- Metro Micro
- Dodger Stadium Gondola
- Automated Bus Lane Enforcement
- Mobility Wallet
- NaviLens
- Bus speed monitoring



Discussion

Lane County Economic Outlook

LTD Board Retreat

Henry Fields

Lane & Douglas Workforce Analyst

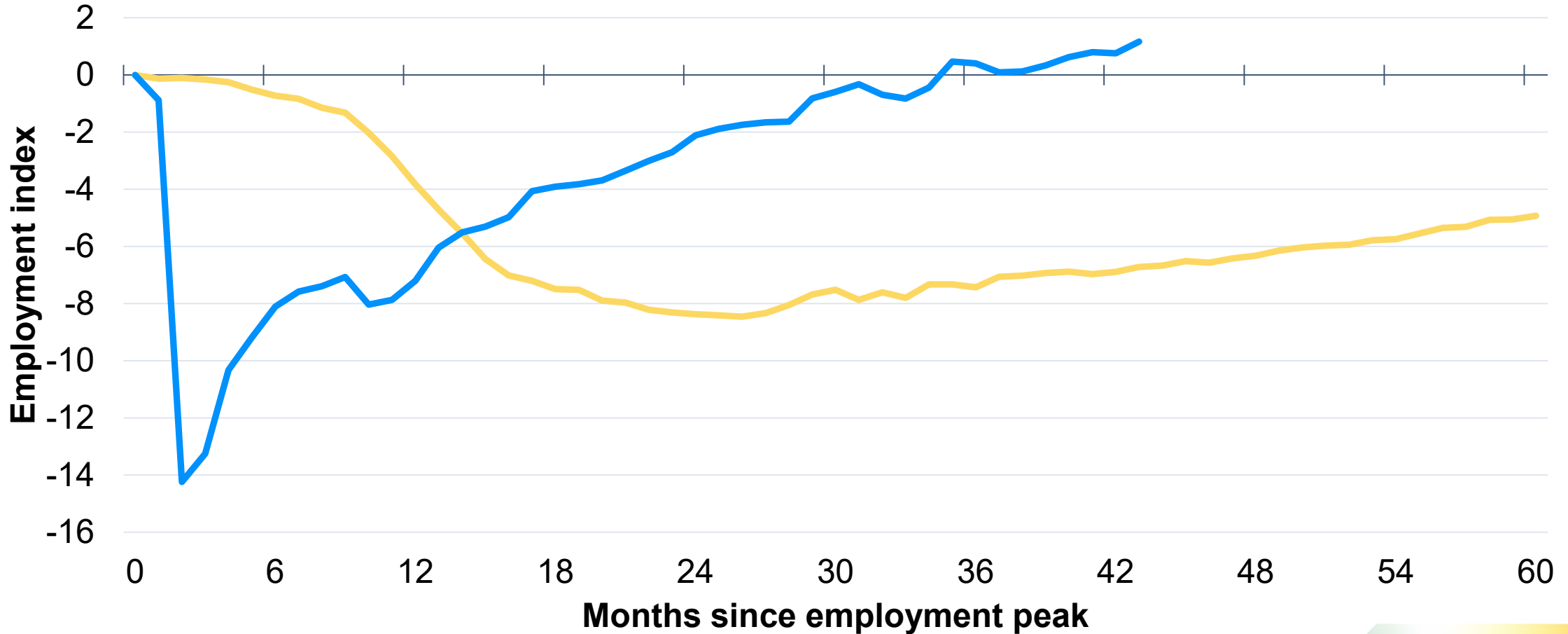
November 29th, 2023

Recovery & Job Vacancies

Overall jobs recovery is fast by historical standards

Oregon Job Change

— Great Recession — COVID



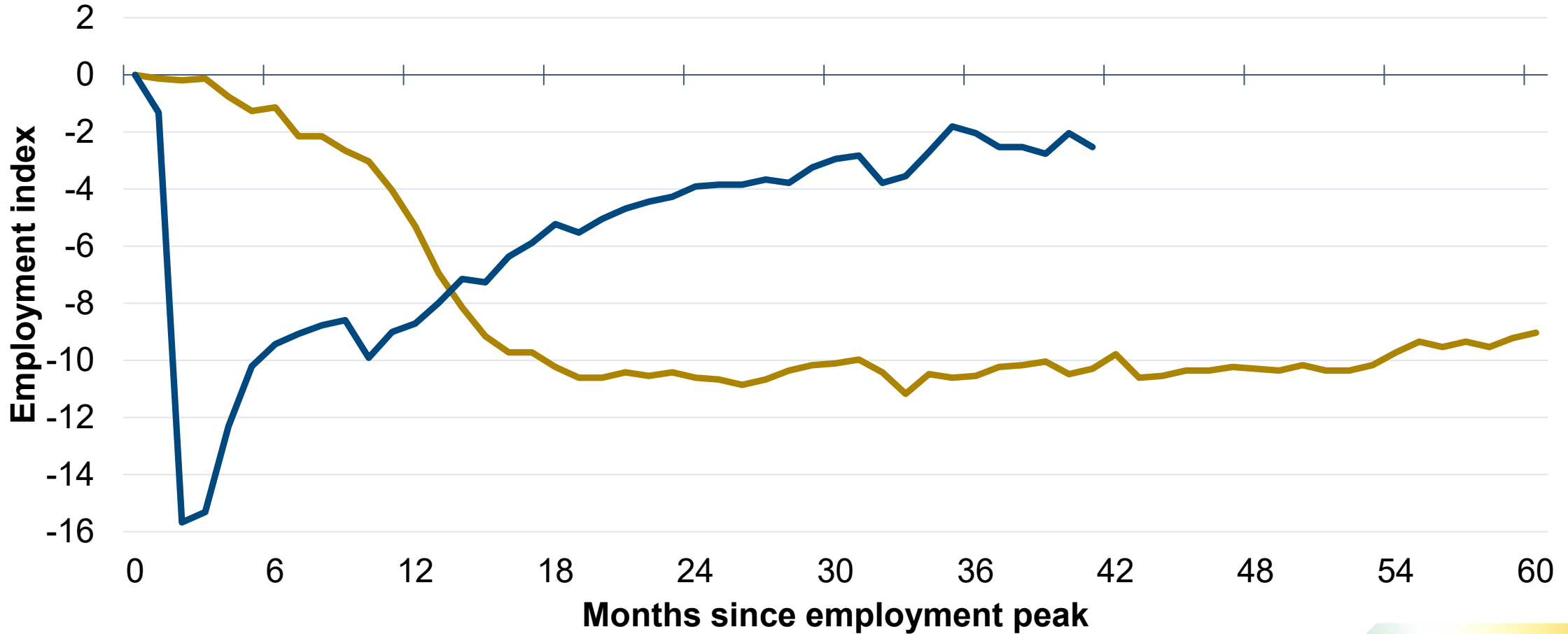
Source: Oregon Employment Department, Current Employment Statistics

LTD Strategic Planning Committee Meeting
March 26, 2021 Page 52 of 95

Overall jobs recovery is fast by historical standards

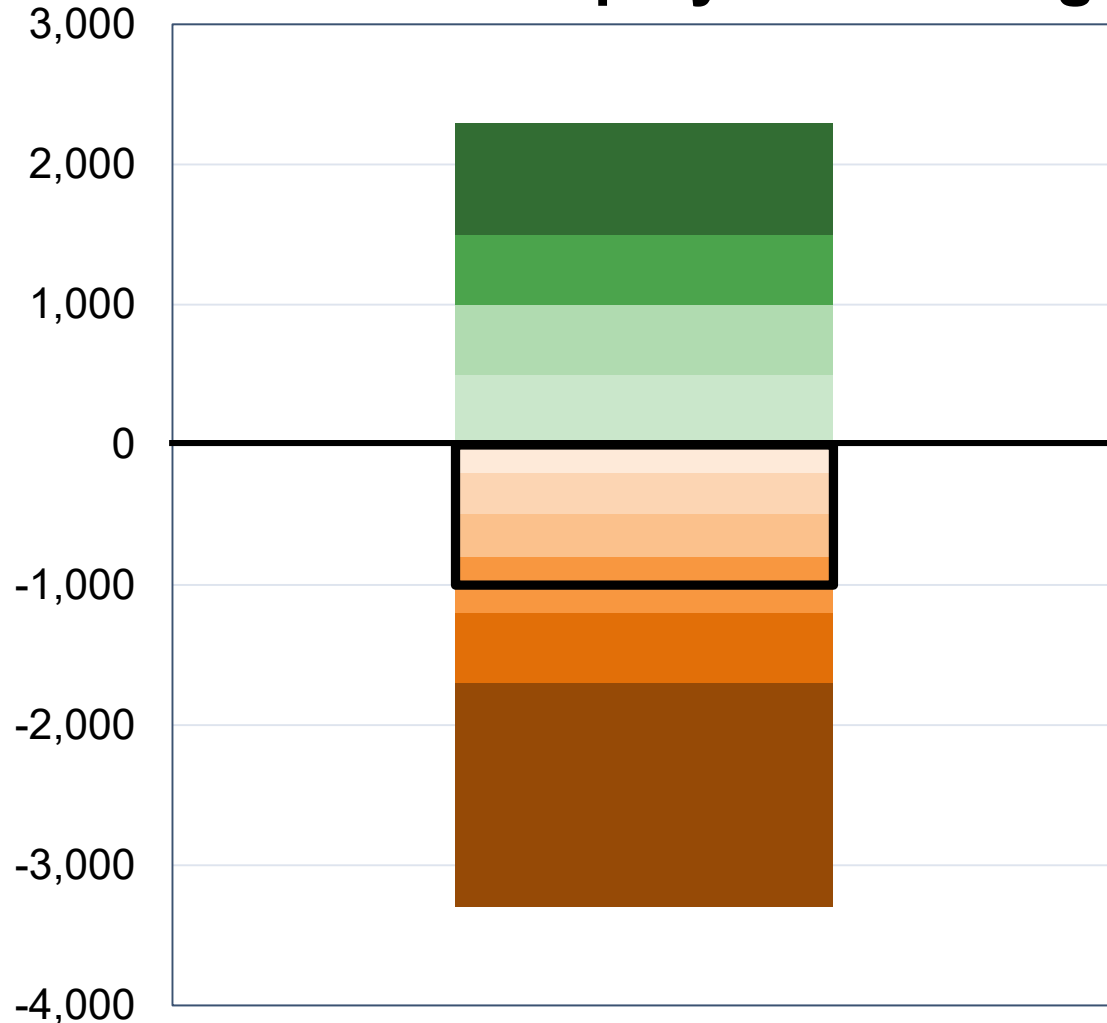
Lane Job Change

— Great Recession — COVID



Employment recovery is uneven by industry

Employment Change September 2019 to 2023

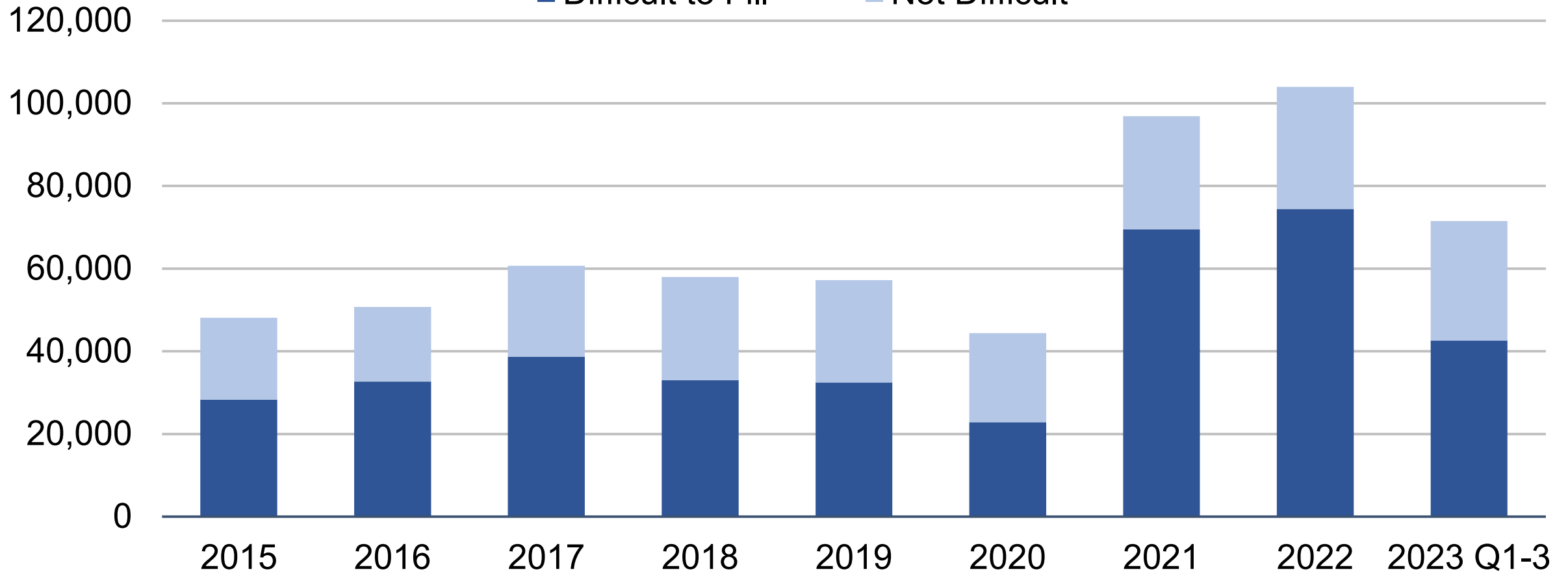


- Professional & business services (+4%), 800
- Financial activities (+6%), 500
- Government minus local education (+4%), 500
- Manufacturing (+4%), 500
- Total (-1%), -1,000**
- Other services (-4%), -200
- Information (-13%), -300
- Trade, transport, & utilities (-1%), -300
- Local education (-2%), -400
- Leisure & hospitality (-3%), -500
- Private education & health services (-5%), -1,600

2023 saw fewer job vacancies, but still elevated

Oregon Job Vacancies

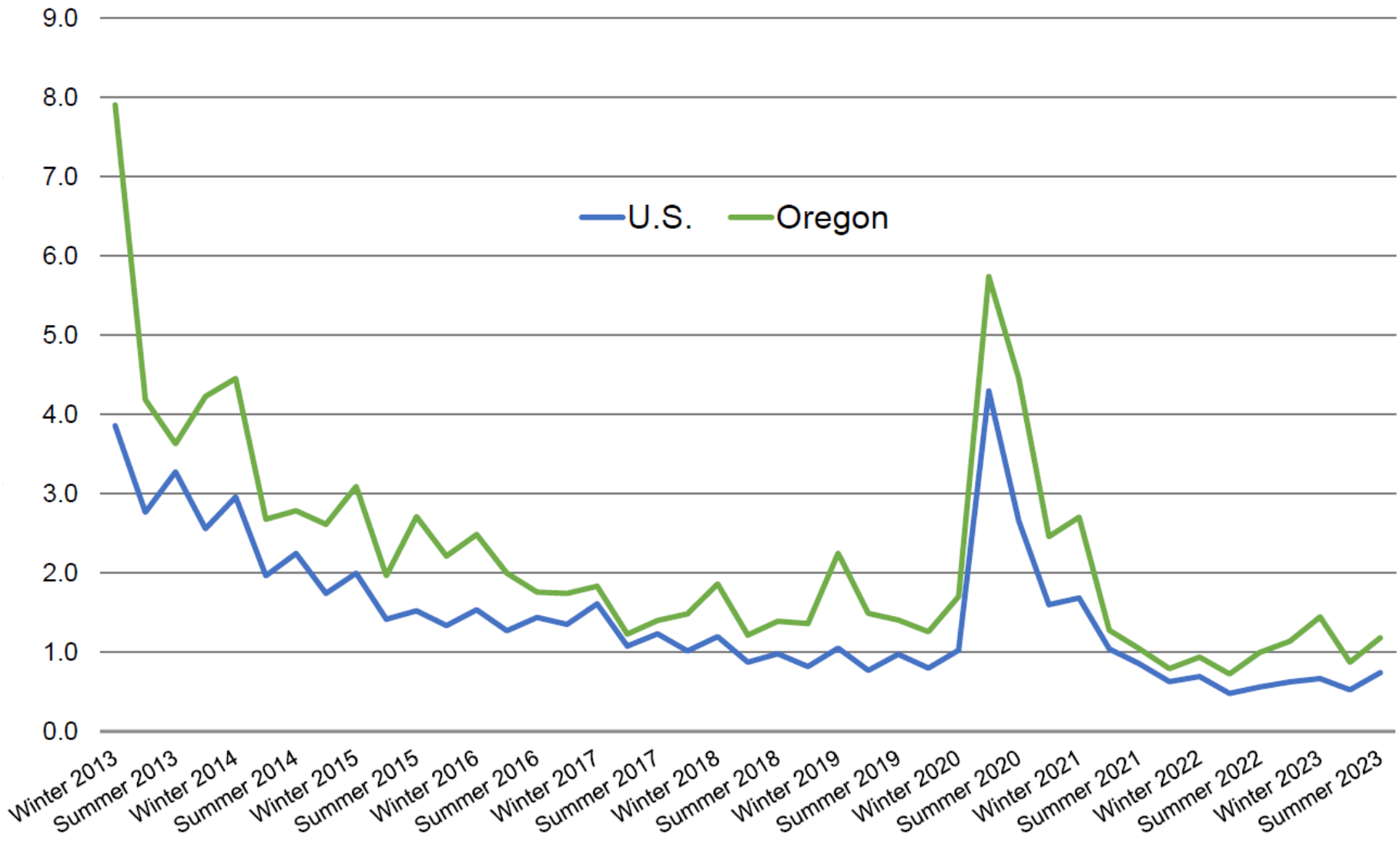
■ Difficult to Fill ■ Not Difficult



Source: Oregon Employment Department, Job Vacancy Survey

OTD Strategic Planning Committee Meeting
March 26, 2024
Page 65 of 90

Recent data shows a low jobseeker to vacancy ratio



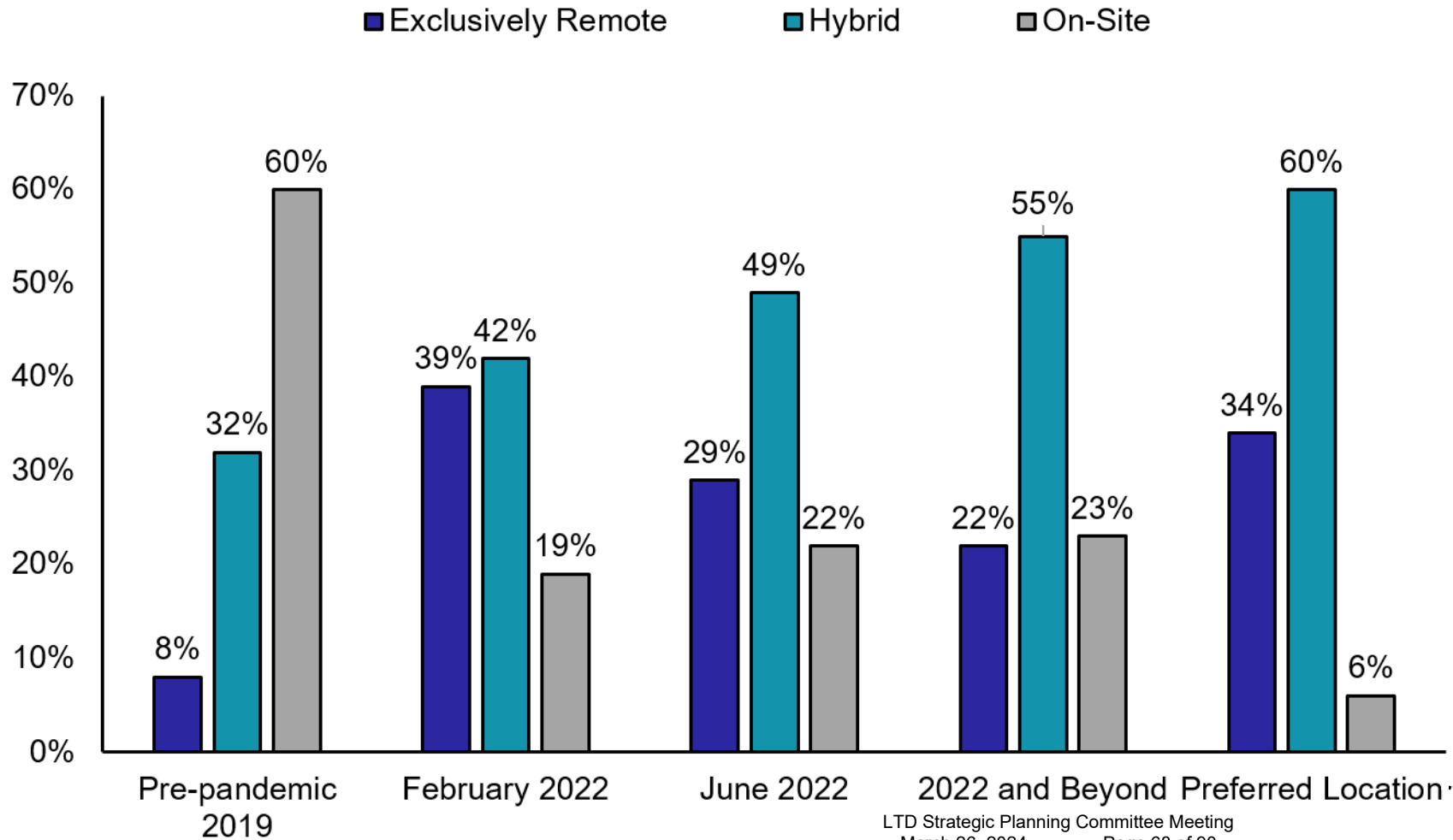
Number of unemployed people per private job opening

Source: Oregon Employment Department, Bureau of Labor Statistics

Remote Work

Remote work, when possible, is very popular

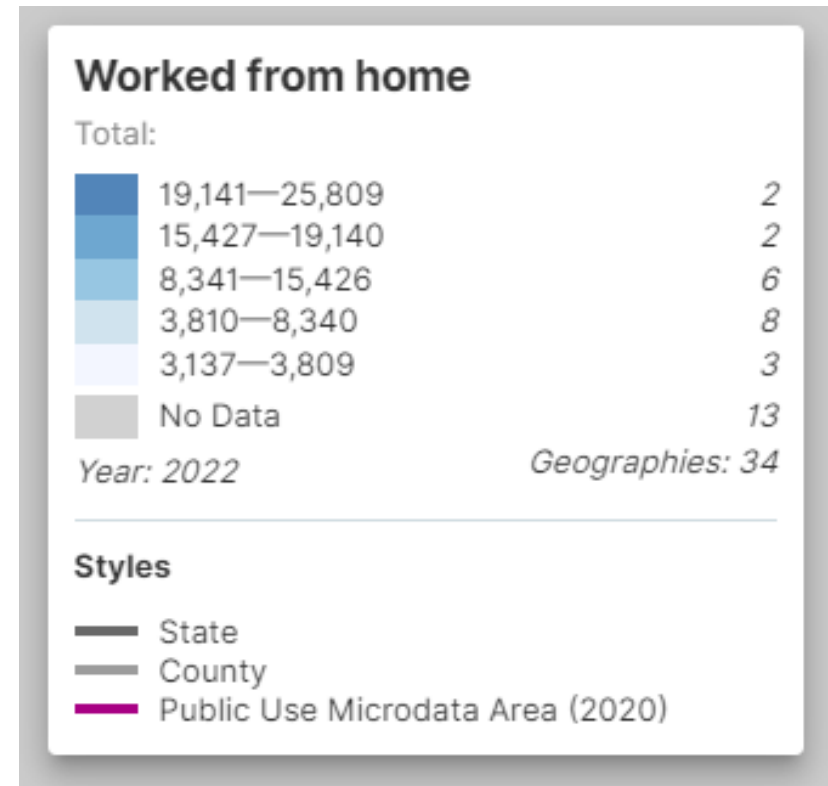
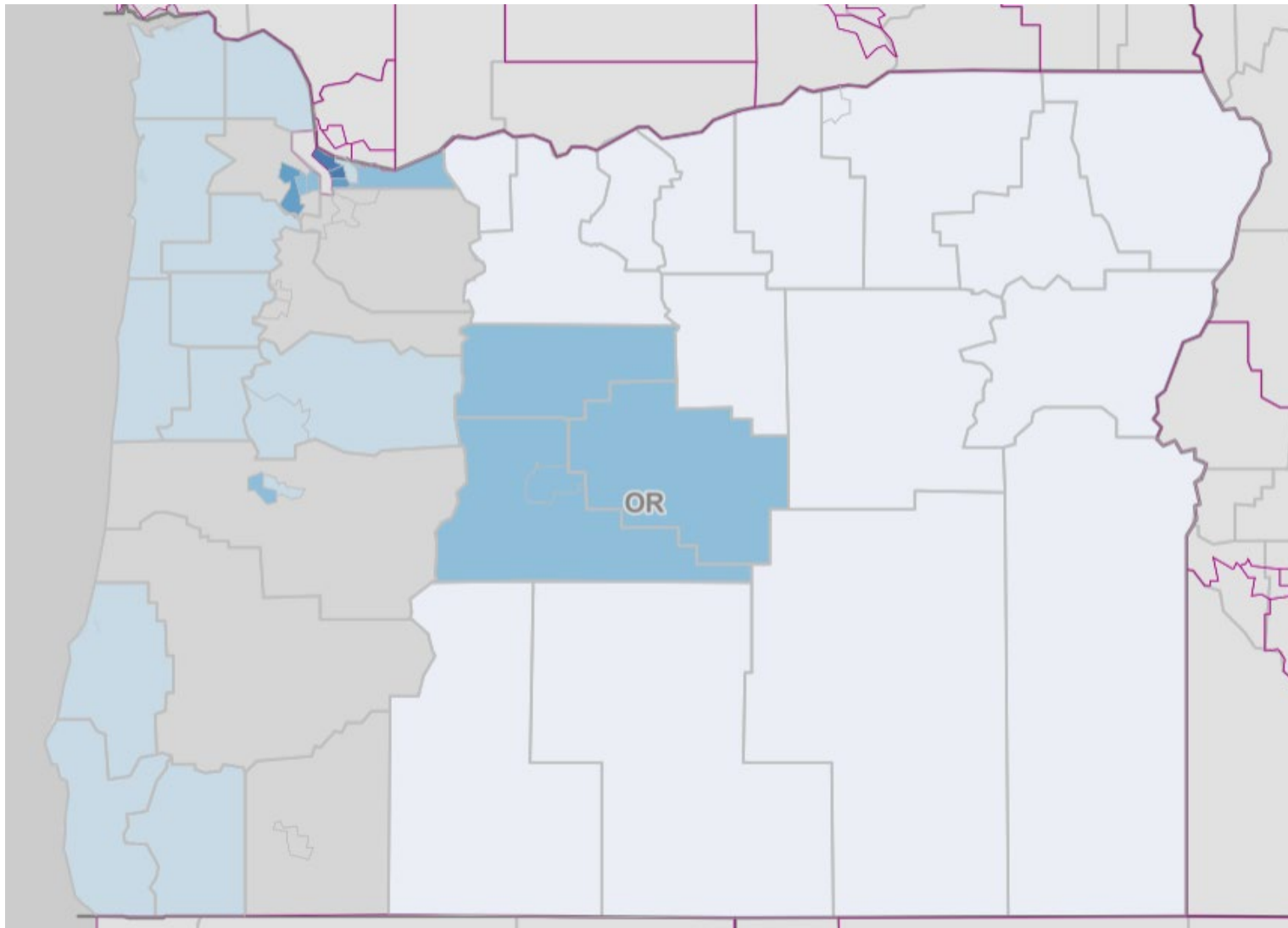
Where do Remote-Capable Employees Expect to Work Long-Term and Where Would They Prefer to Work?



Quality Info article:
[Working from Home since COVID — the New Work Experiment](#)

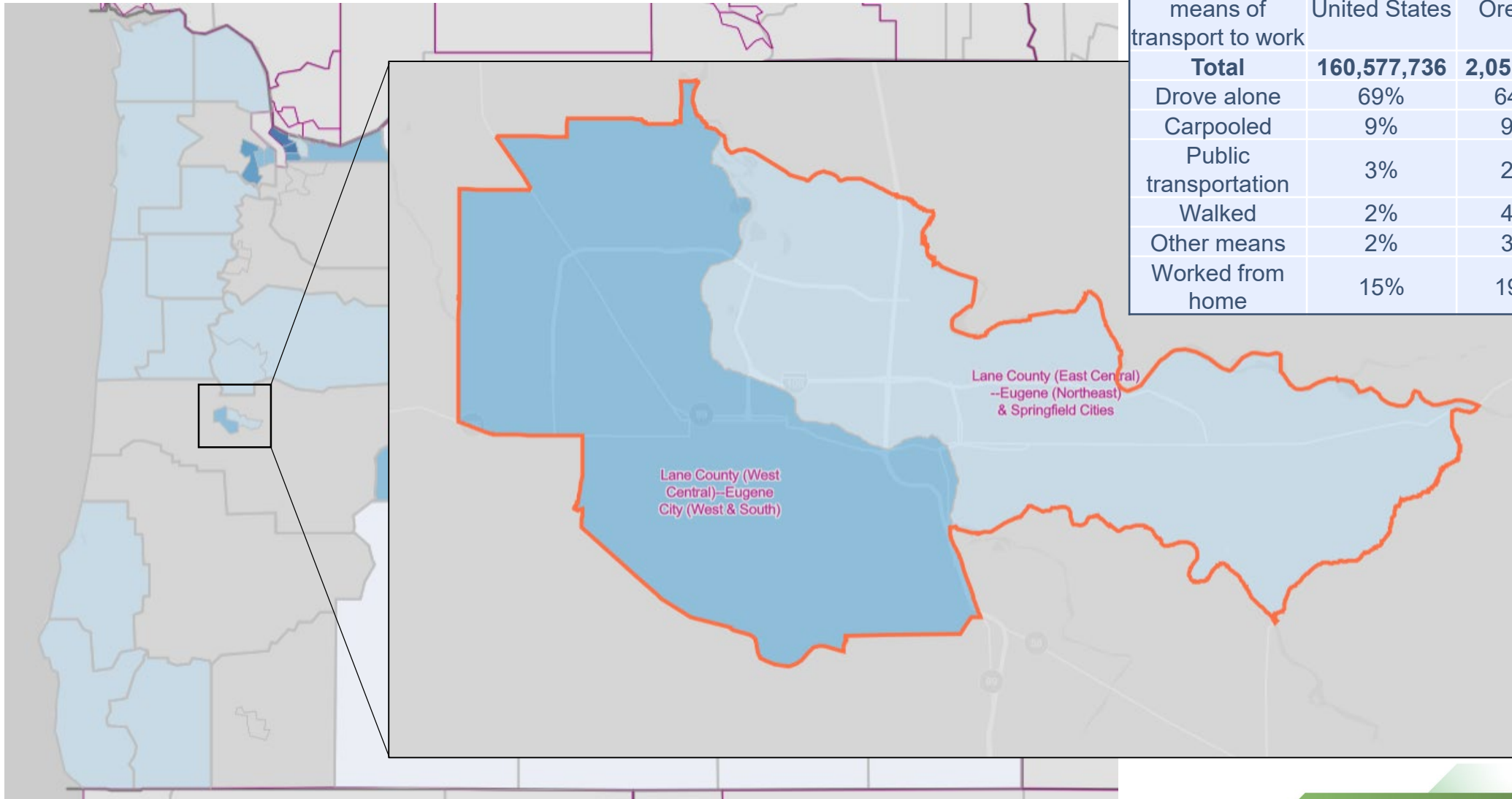
Source: OED and Gallup Survey Returning to the Office: The Current, Preferred, and Future State of Remote Work

Remote work is much more prevalent than pre-2020



[Link to full data](#)

Lane doesn't differ dramatically from Oregon but there are key differences



Workers by means of transport to work	United States	Oregon	West Central Lane	East Central Lane
Total	160,577,736	2,055,100	79,202	56,549
Drove alone	69%	64%	61%	70%
Carpooled	9%	9%	8%	10%
Public transportation	3%	2%	1%	2%
Walked	2%	4%	7%	2%
Other means	2%	3%	7%	3%
Worked from home	15%	19%	16%	13%

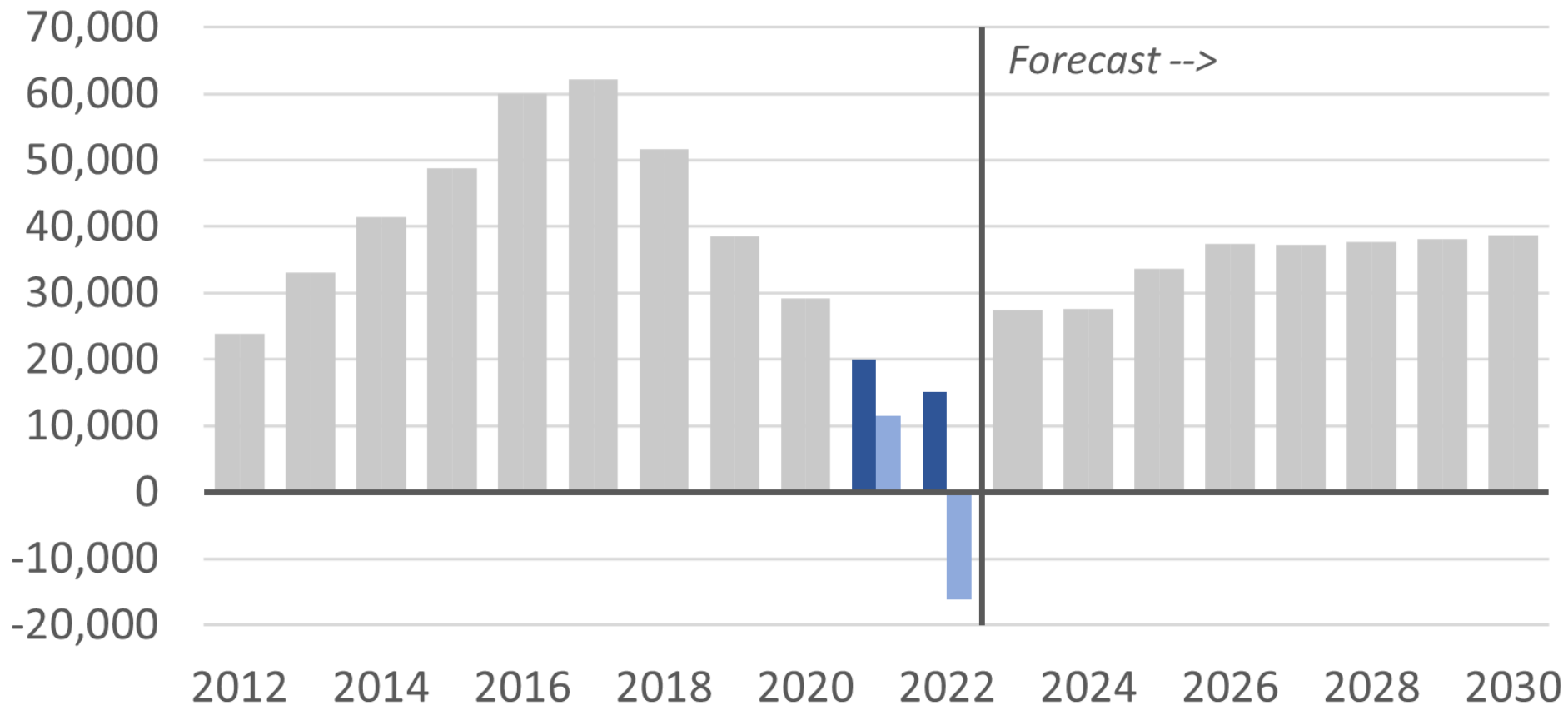
[Link to full data](#)

Population & Workforce Change

Population (may be) growing slowly, or declining

Annual change in total state population

OEA History and Forecast, **Portland State Estimates**, **Census Bureau Estimates**

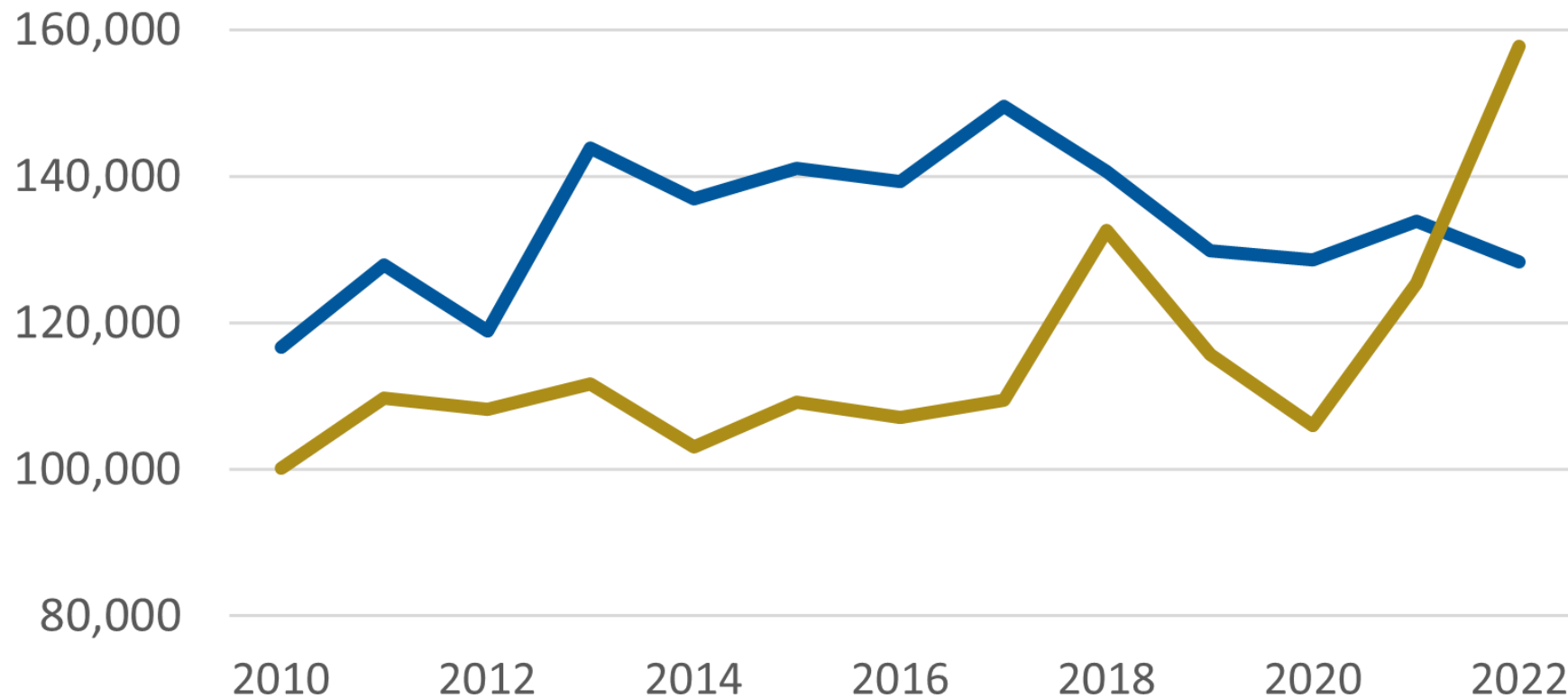


Source: *Census, Portland State Population Research Center, Oregon Office of Economic Analysis*

Oregon had net out-migration in 2022, first in 40 years

Oregon Domestic Migration

Number of people moving *Into Oregon* and *Out of Oregon*

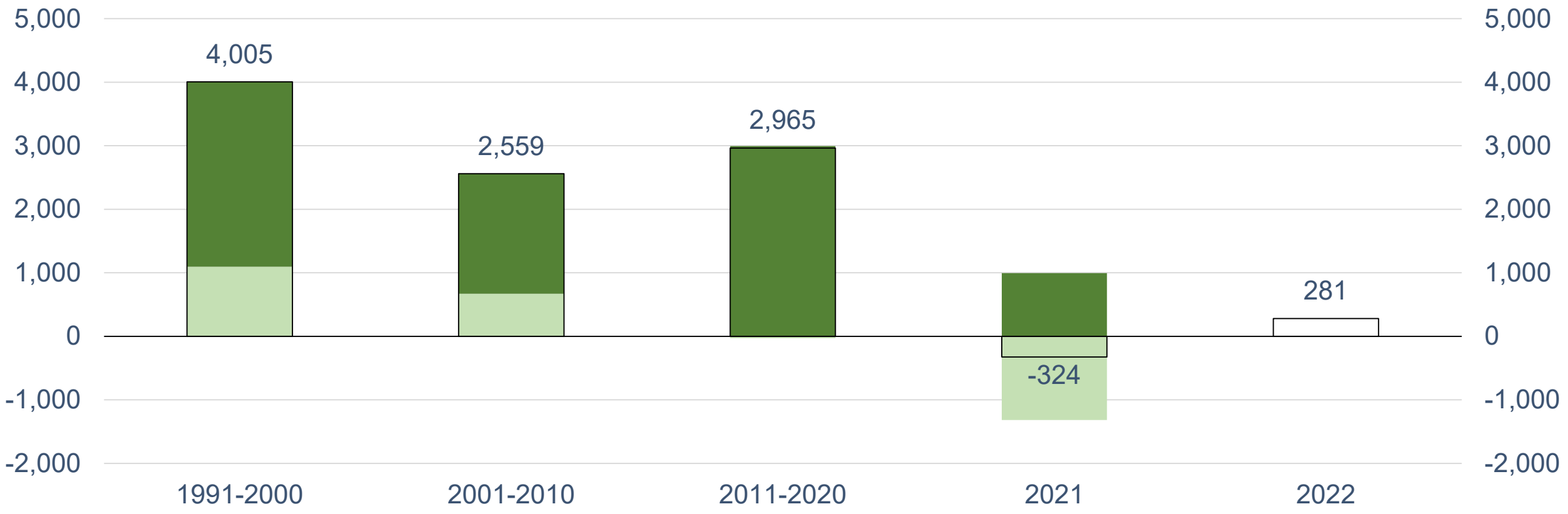


Source: Census, IPUMS-USA, Oregon Office of Economic Analysis
VT Strategic Planning Committee Meeting
March 26, 2024 Page 73 of 90

Lane's population growth slowed significantly post-2020

Lane County Annual Population Change

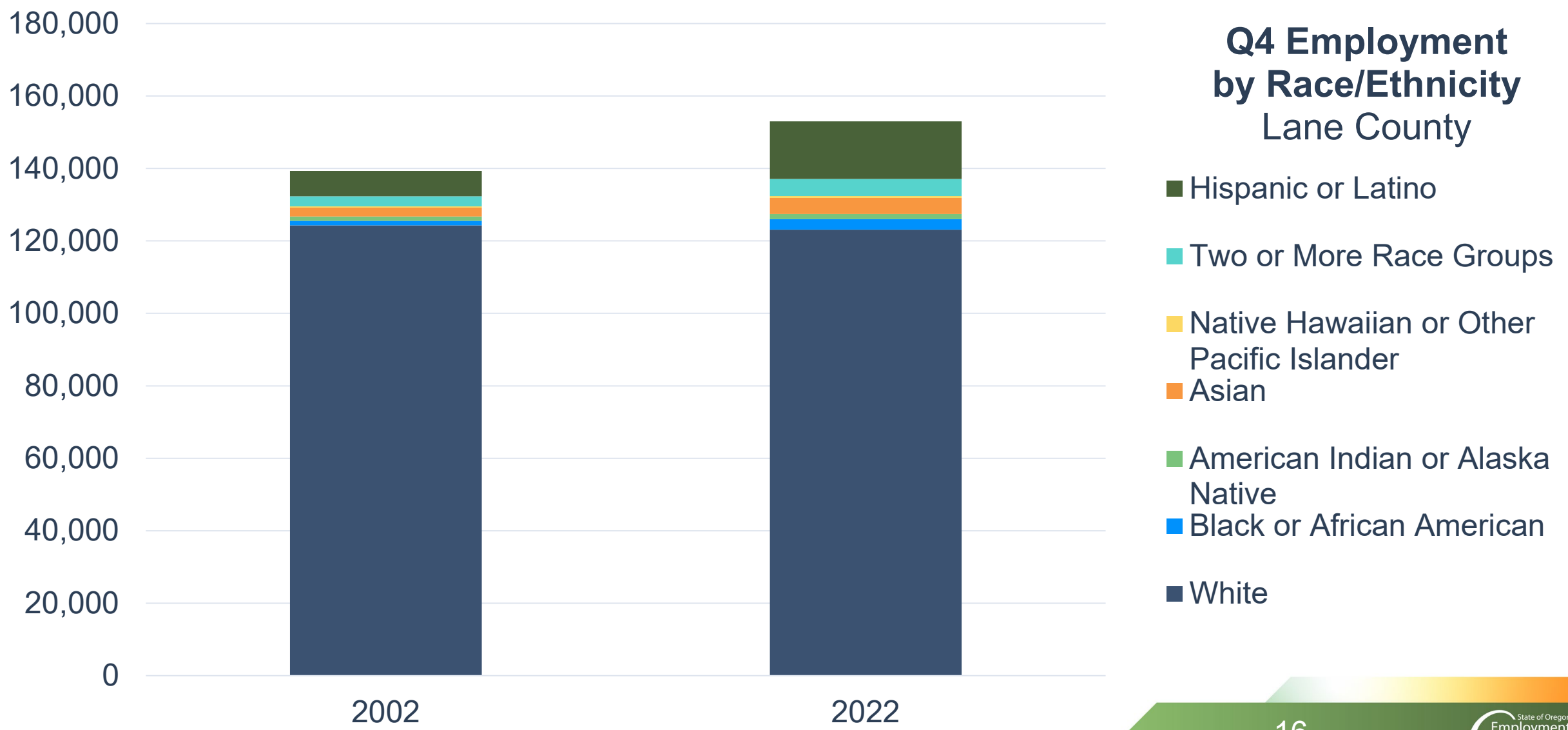
■ Natural Increase ■ Net Migration □ Total



Source: Portland State University Population Research Center, U.S. Census Bureau

LTP Strategic Planning Committee Meeting
March 26, 2024 Page 74 of 90

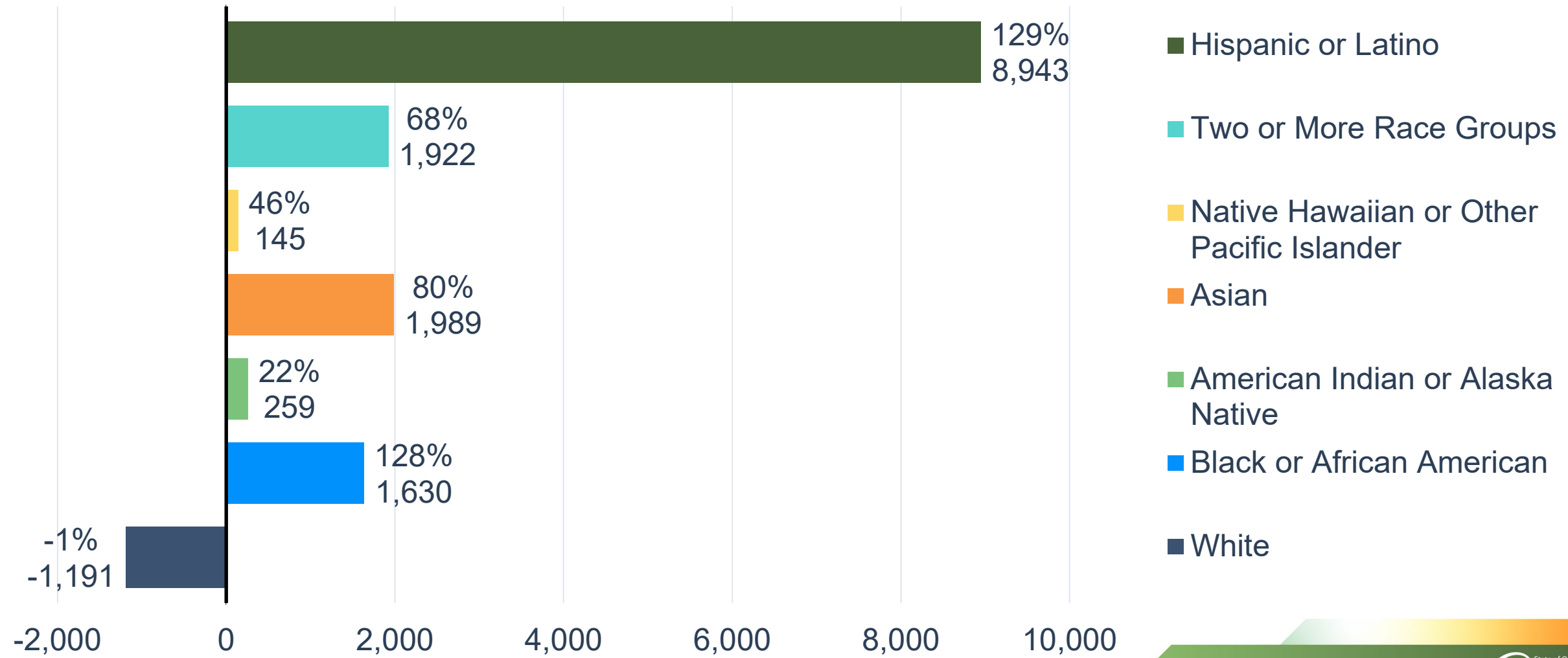
Lane County's workforce is less racially diverse than the nation's



Source: U.S. Census Bureau Quarterly Workforce Indicators
LTD Strategic Planning Committee Meeting
March 26, 2024
Page 75 of 90

But the workforce is diversifying rapidly in recent years

Net Change in Workers 2002-2022



Source: U.S. Census Bureau Quarterly Workforce Indicators

Economic Structure

Average wages are lower in Lane County

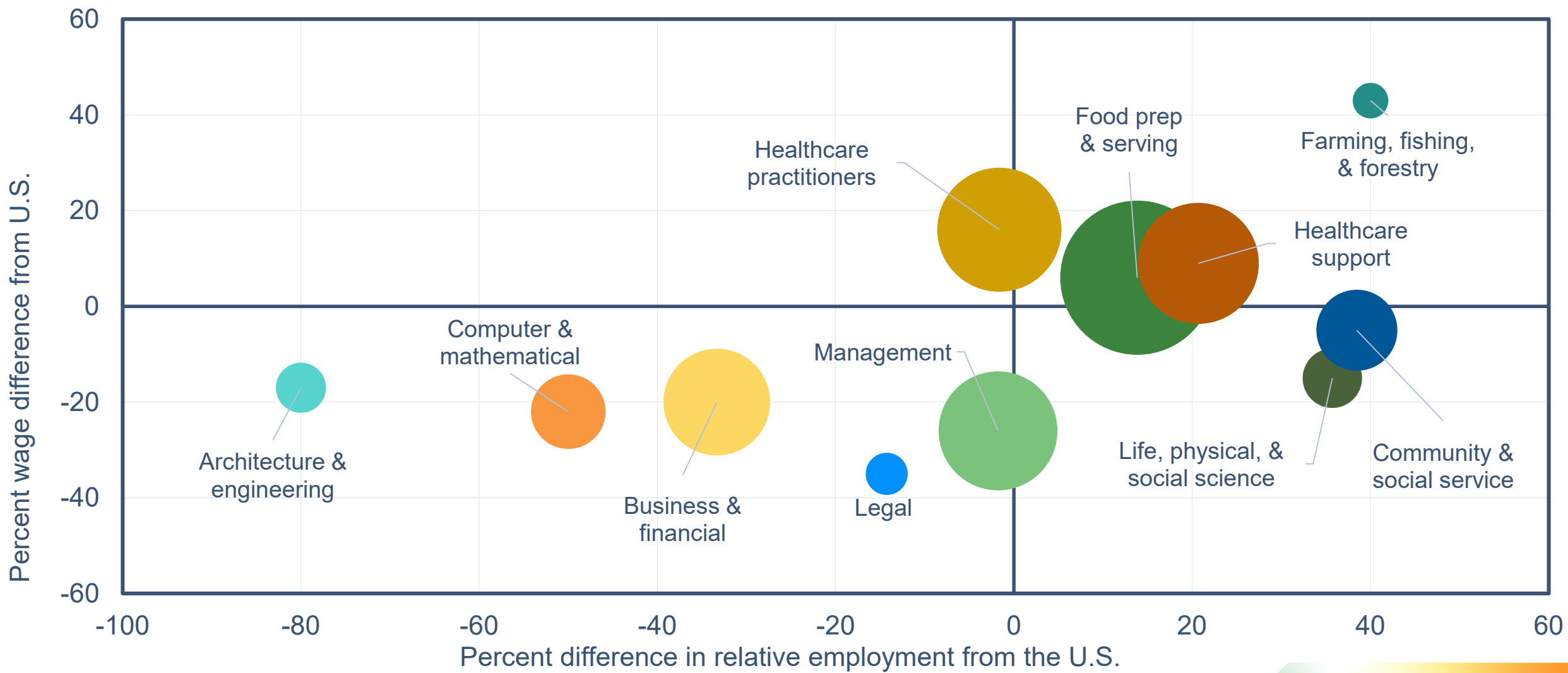
Annual average wage per worker



Source: U.S. Bureau of Labor Statistics and Oregon Employment Department, Quarterly Census of Employment and Wages

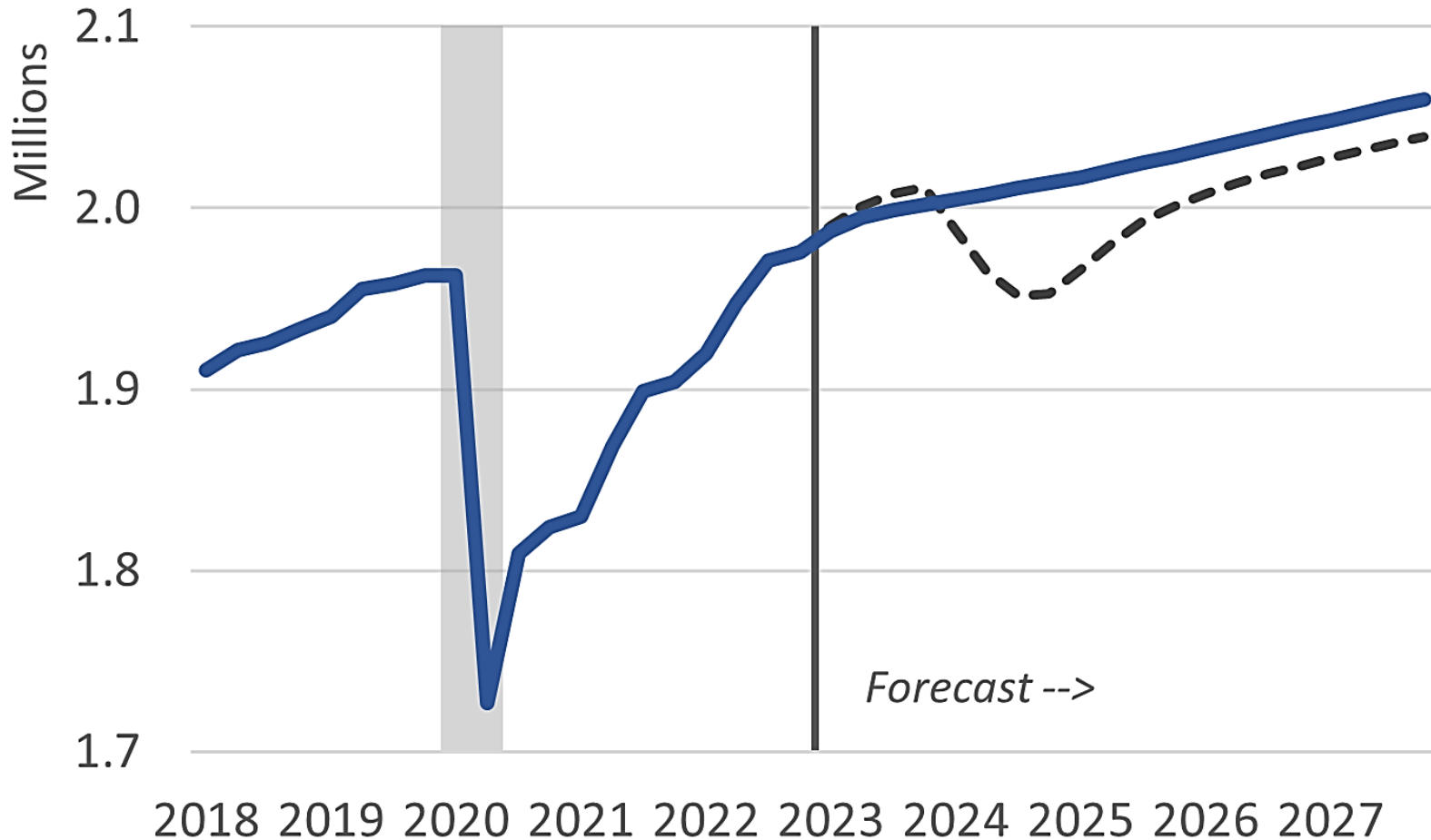
LTD Strategic Planning Committee Meeting
March 26, 2024 Page 78 of 90

Much of the wage gap comes from differences in job type



Source: Oregon Employment Department, Bureau of Labor Statistics, Occupational Employment and Wage Statistics
LTD Strategic Planning Committee Meeting
March 26, 2024 Page 79 of 90

Baseline Soft Landing and Boom/Bust Alternative Scenario



Cross currents make prediction complicated, but consensus is guarded optimism

Strong labor market
(Difficulty finding workers)

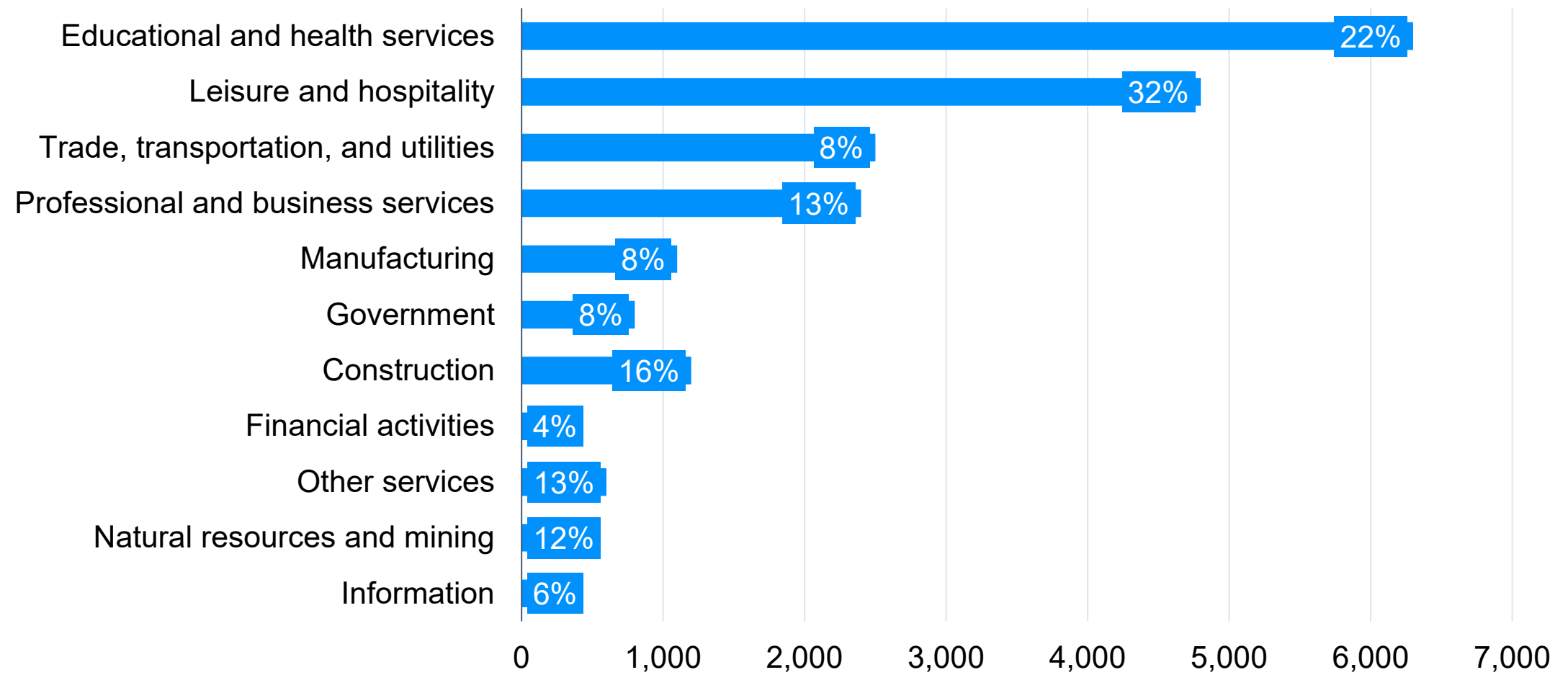
Cooling inflation
(Inflation remains elevated)

Rise in start-up activity
Decelerating population growth
Federal investment

Alternative Boom/Bust Scenario
Moderate sized recession
starting in 2024 or 2025

All major industries are projected to add jobs over 10 years

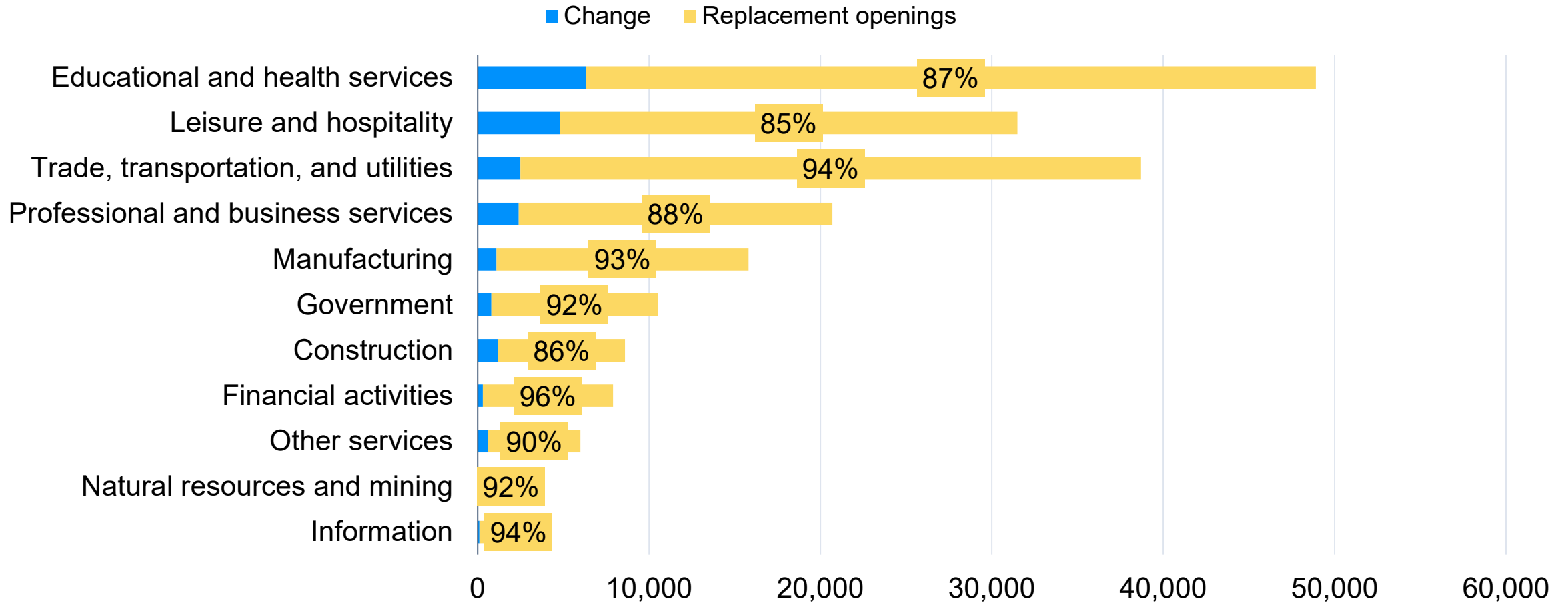
Lane County Projected Job Change, 2021-2031



Source: Oregon Employment Department, 2021-2031 Industry Employment Projections

The vast majority of job openings are due to replacement

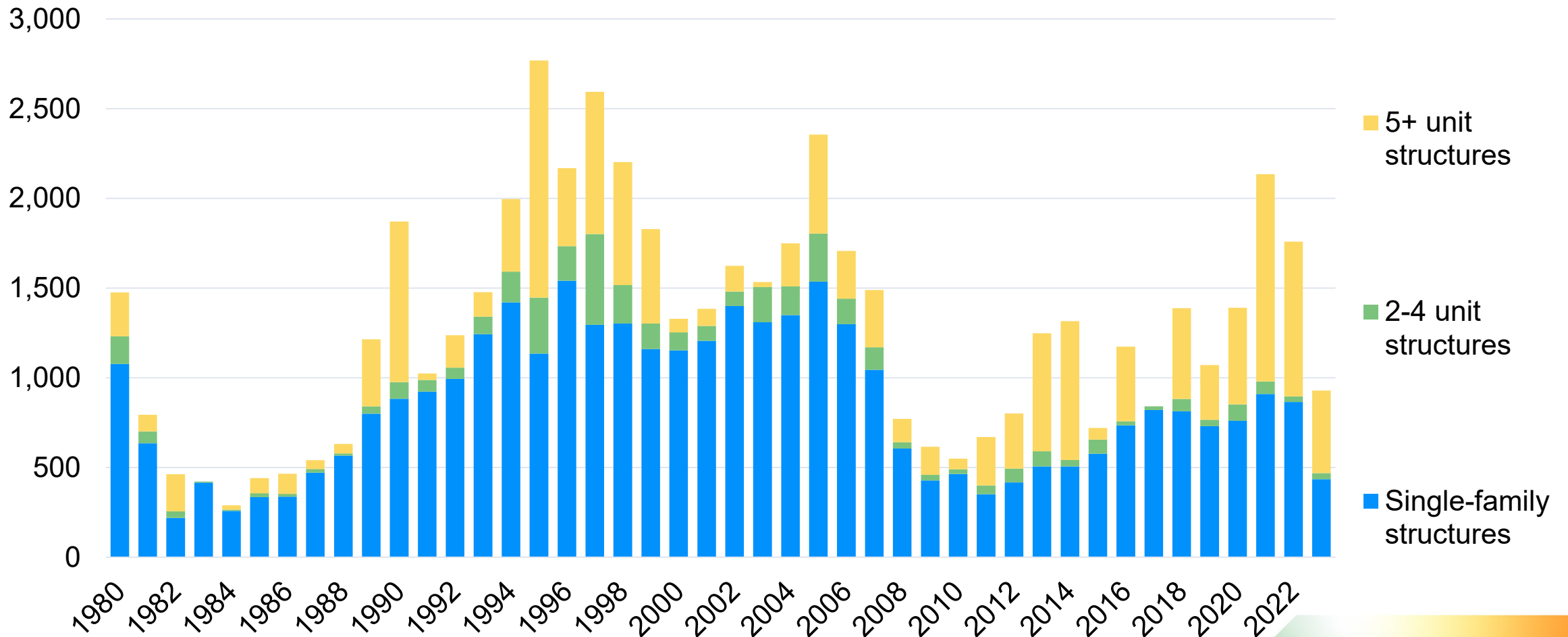
Lane County Projected Job Change, 2021-2031



Source: Oregon Employment Department, 2021-2031 Industry Employment Projections

Housing production lags previous decades

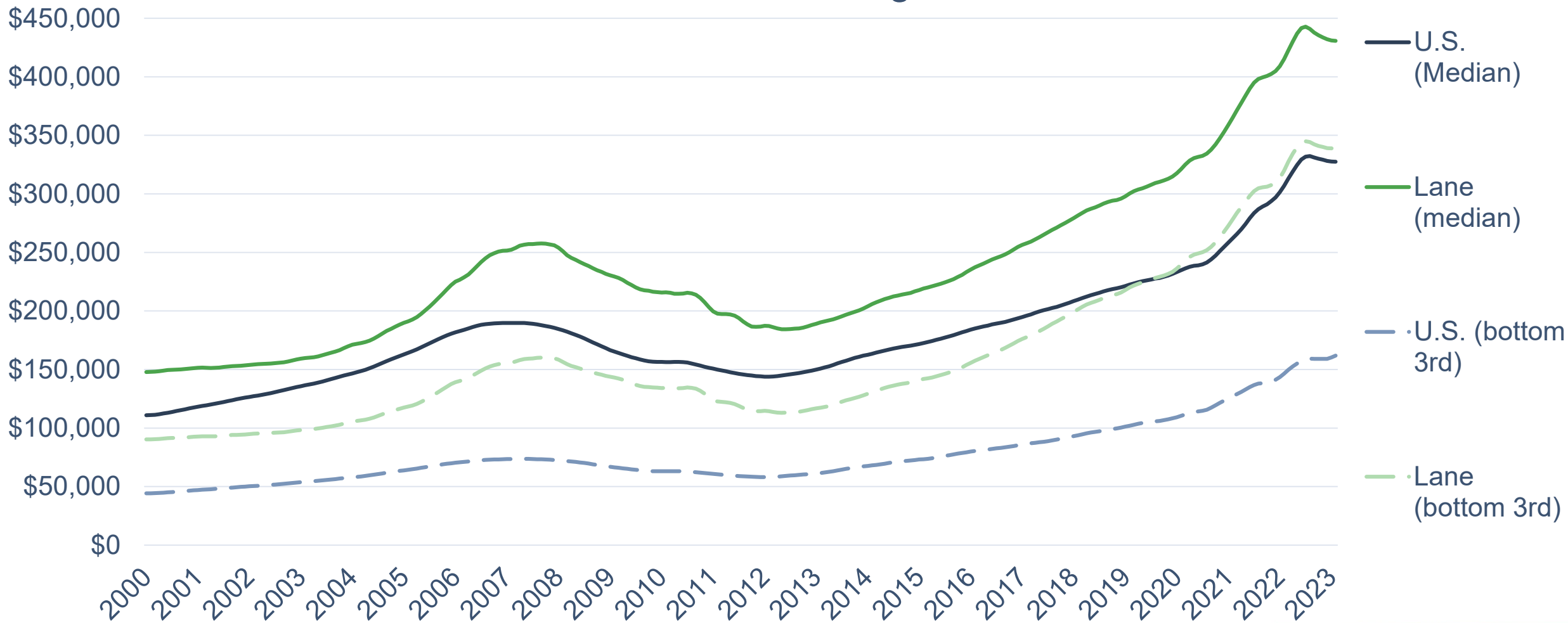
Housing units permitted by size of structure Lane County, 1980 - Jul. 2023



Source: U.S. Census Bureau Building Permits Survey
Strategic Planning Committee Meeting
March 26, 2024 Page 83 of 90

Housing costs have risen, particularly on the affordable end

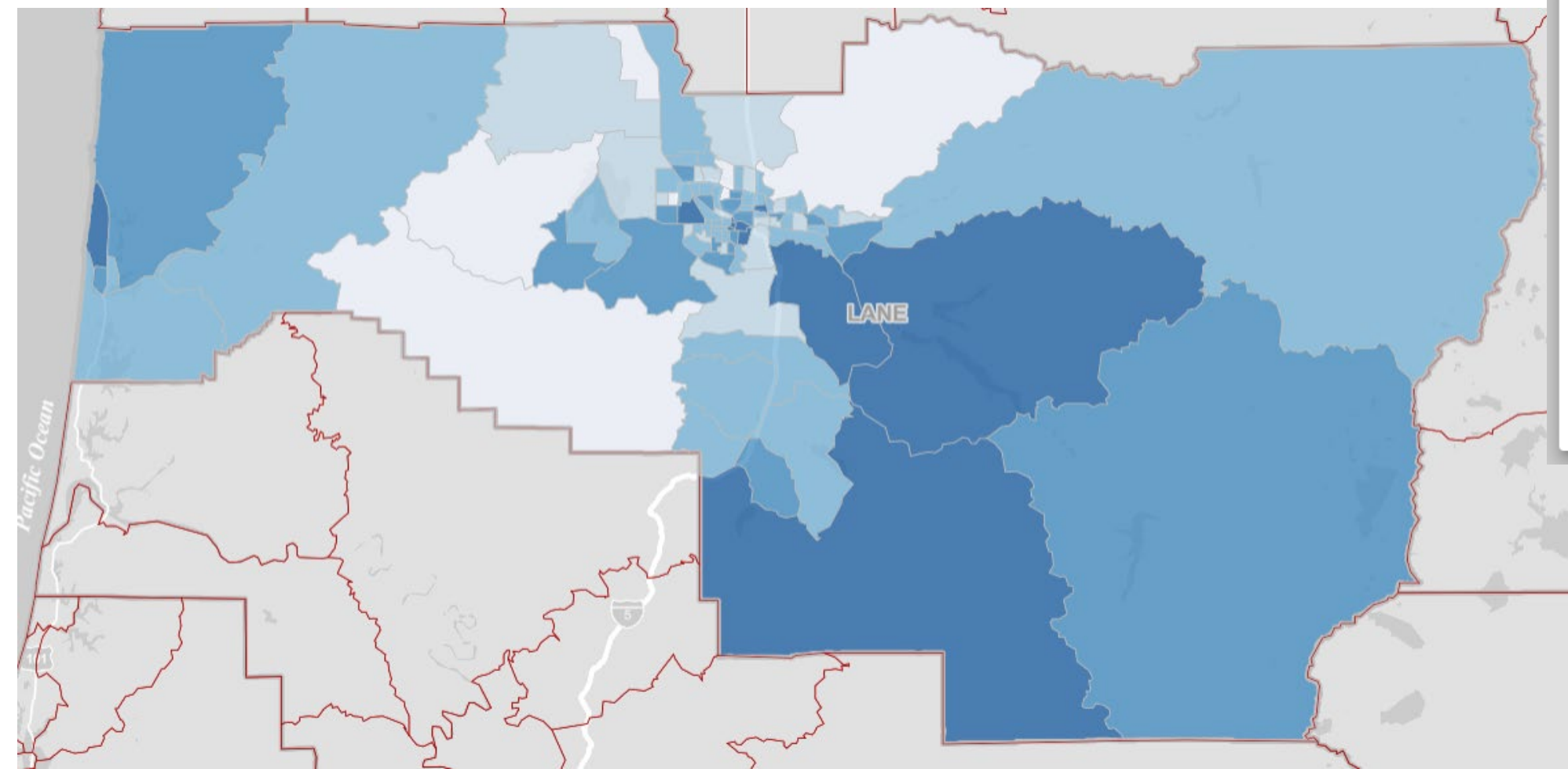
Median Housing Value



Source: Zillow Research

Rent affordability varies by geography and income

Percent of households paying 35 percent or more on rent



35.0 percent or more
Occupied units paying rent (excluding units where GRAPI cannot be computed) | GROSS RENT AS A PERCENTAGE OF HOUSEHOLD INCOME (GRAPI)

58.9%—77.2%	10
46.1%—58.8%	19
34.4%—46%	38
18.1%—34.3%	18
2.4%—18%	7
No Data	1

Year: 2021 Geographies: 93

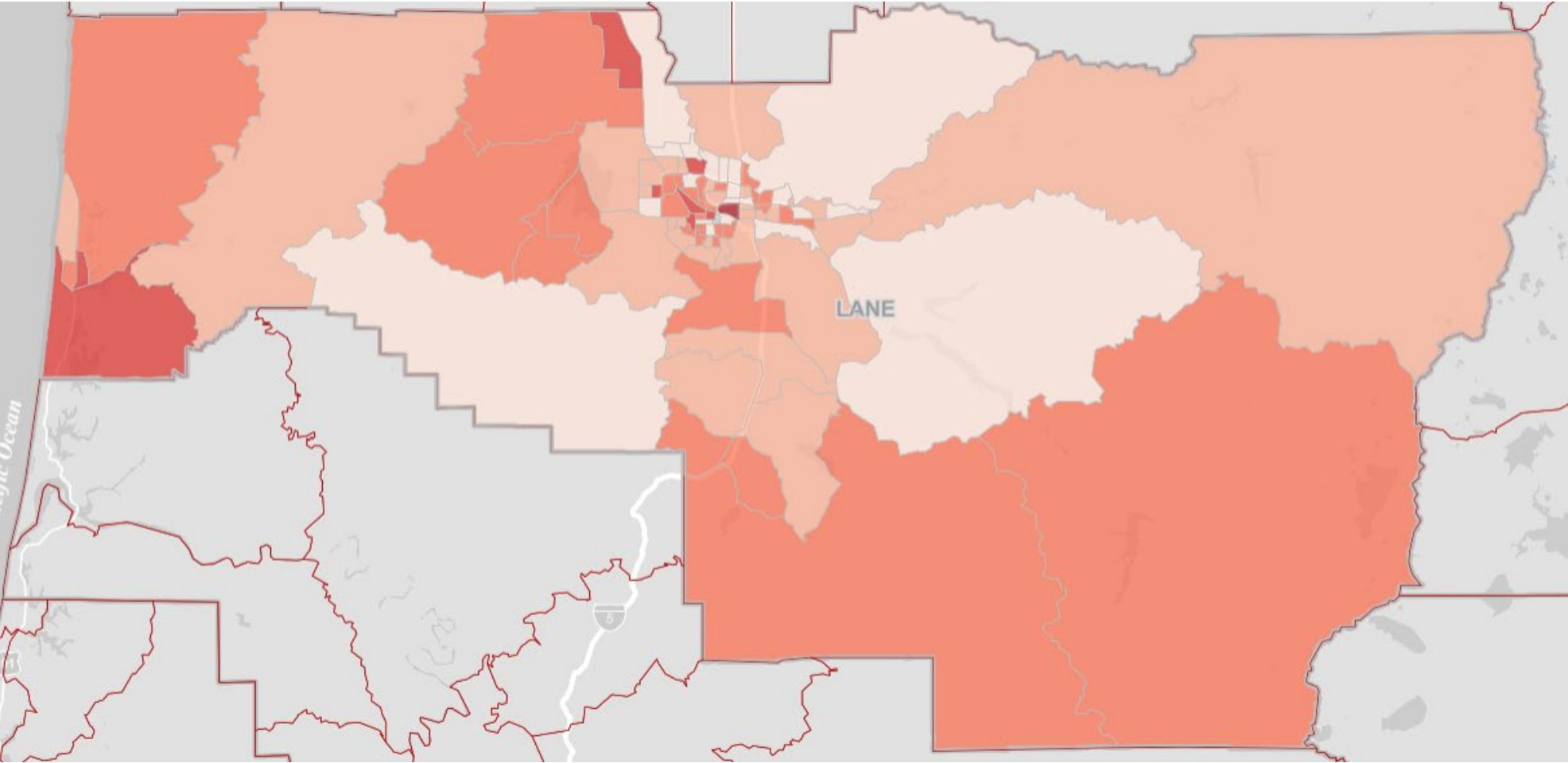
Styles

- State
- County
- Census Tract

[Link to full data](#)

Affordable homeownership is distributed differently as well

Percent of households with a mortgage paying 35 percent of household income on housing



35.0 percent or more
Housing units with a mortgage (excluding units where SMOCAPI cannot be computed) | SELECTED MONTHLY OWNER COSTS AS A PERCENTAGE OF HOUSEHOLD INCOME (SMOCAPI)

53.3%—83.1%	1
37.7%—53.2%	8
25.5%—37.6%	30
17.4%—25.4%	30
7.2%—17.3%	21
No Data	3

Year: 2021 Geographies: 93

Styles

- State
- County
- Census Tract

[Link to full data](#)

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OREGON ECONOMIC INDICATORS

Unemployment Rate - October 2023	3.6%	↑
Seasonally Adjusted		0.1%
Total Unemployed - October 2023	76,592	↑
Seasonally Adjusted		1,669
Nonfarm Employment - October 2023	2,003,300	↓
Seasonally Adjusted		-4,600
Job Vacancies - 3rd Quarter 2023	70,485	↑
		2.0%

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Henry Fields

Workforce Analyst, Lane and Douglas counties

Henry.L.Fields@employ.oregon.gov

(541) 359-9178

Recent Publications and Presentations



Lane Transit District Attain Grant Application

Presented By: Tom Schwetz, Director of Mobility Planning and Policy

Tom will provide an update on the submittal of a grant application to the Federal Highway Administration's ATTAIN grant program. The Strategic Planning Committee has received updates on Lane Transit District's 'Reimagine the Ride' process focused on defining LTD's role as the region's mobility manager. LTD has been conducting a pilot program in Cottage Grove providing a mobility on demand service within Cottage Grove's city limits. Drawing on this experience, LTD's ATTAIN grant application is focused on the development of a platform that will enable the design and deployment of enhanced on-demand transit services better able to respond to the needs of the District and Lane County as a whole.



Lane Transit District Items for review at future meeting

April 23, 2024

- a. **STRATEGIC PLAN UPDATE**.....Aimee Reichert, Chief Performance Officer
- b. **REIMAGINE THE RIDE PROGRESS REPORT**.....Tom Schwetz, Director of Mobility Planning and Policy
- c. **COA UPDATE**.....Jeremy Card/Tom Schwetz
- d. **MOBILITY MANAGEMENT FRAMEWORK**.....Tom Schwetz, Director of Mobility Planning and Policy

June 25, 2024

- a. **COA SCENARIOS ADOPTION**.....Jeremy/David
- b. **LRMP PROCESS UPDATE**..... David/ODOT