

# Lane Transit District Board Retreat

November 29, 2023



Lane Transit District

LTD.org

# Safety Message



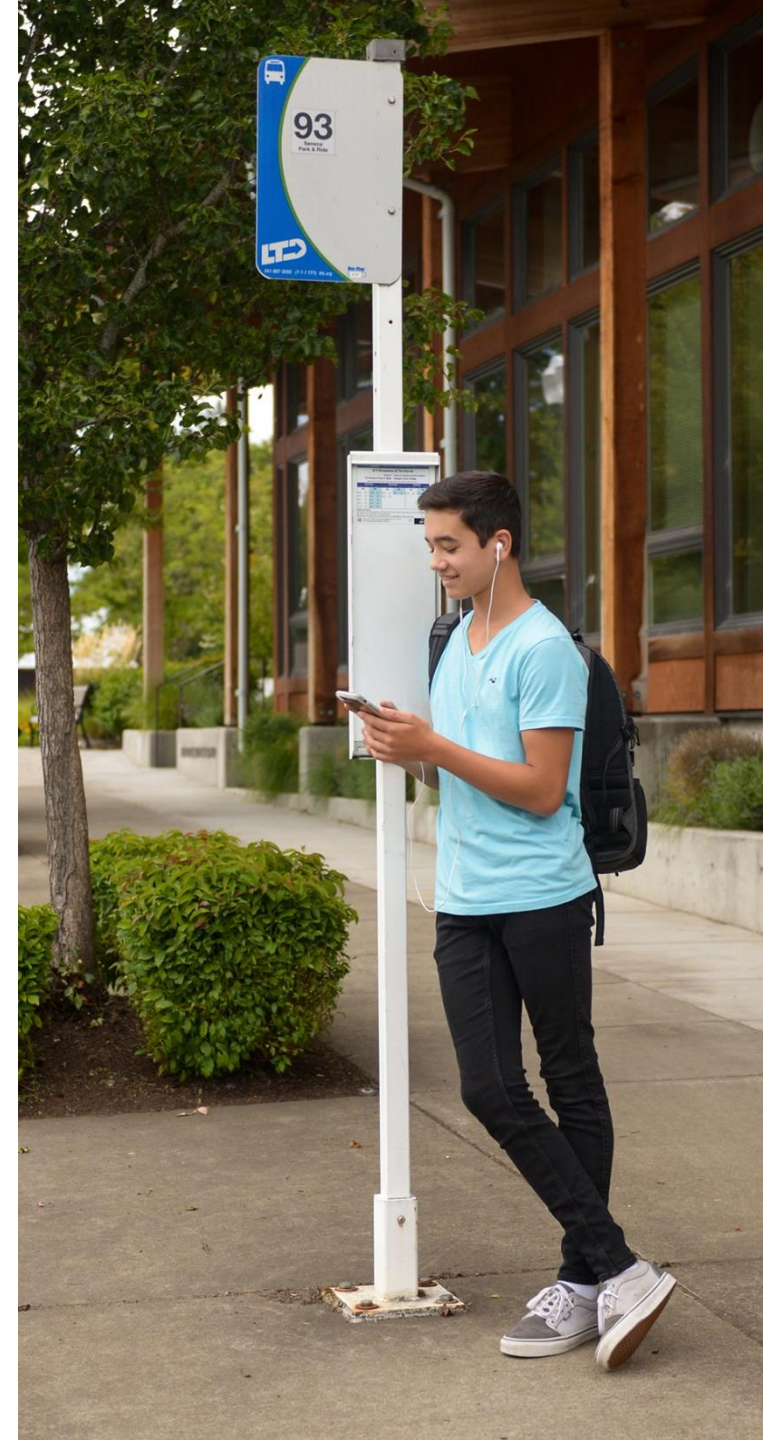
# Invitations to the Room



Start on time, End on time

Minimize use of Active Electronics

Say what you would say at Home



# Welcoming Remarks

**Gino Grimaldi**

Board President



**Jameson Auten**

Chief Executive Officer



# AGENDA

- Welcome and Purpose
- Why Exercise
- LTD Current State
- Economic Outlook
- Mobility Management
- Path Forward: Mobility Framework
- Headline Exercise
- Blind Spots & Threats
- Priorities and Next Steps





**MISSION**

CONNECTING OUR COMMUNITY.

**VISION**

IN ALL THAT WE DO, WE ARE COMMITTED TO  
CREATING A MORE CONNECTED, SUSTAINABLE, AND  
EQUITABLE COMMUNITY.

**VALUES**

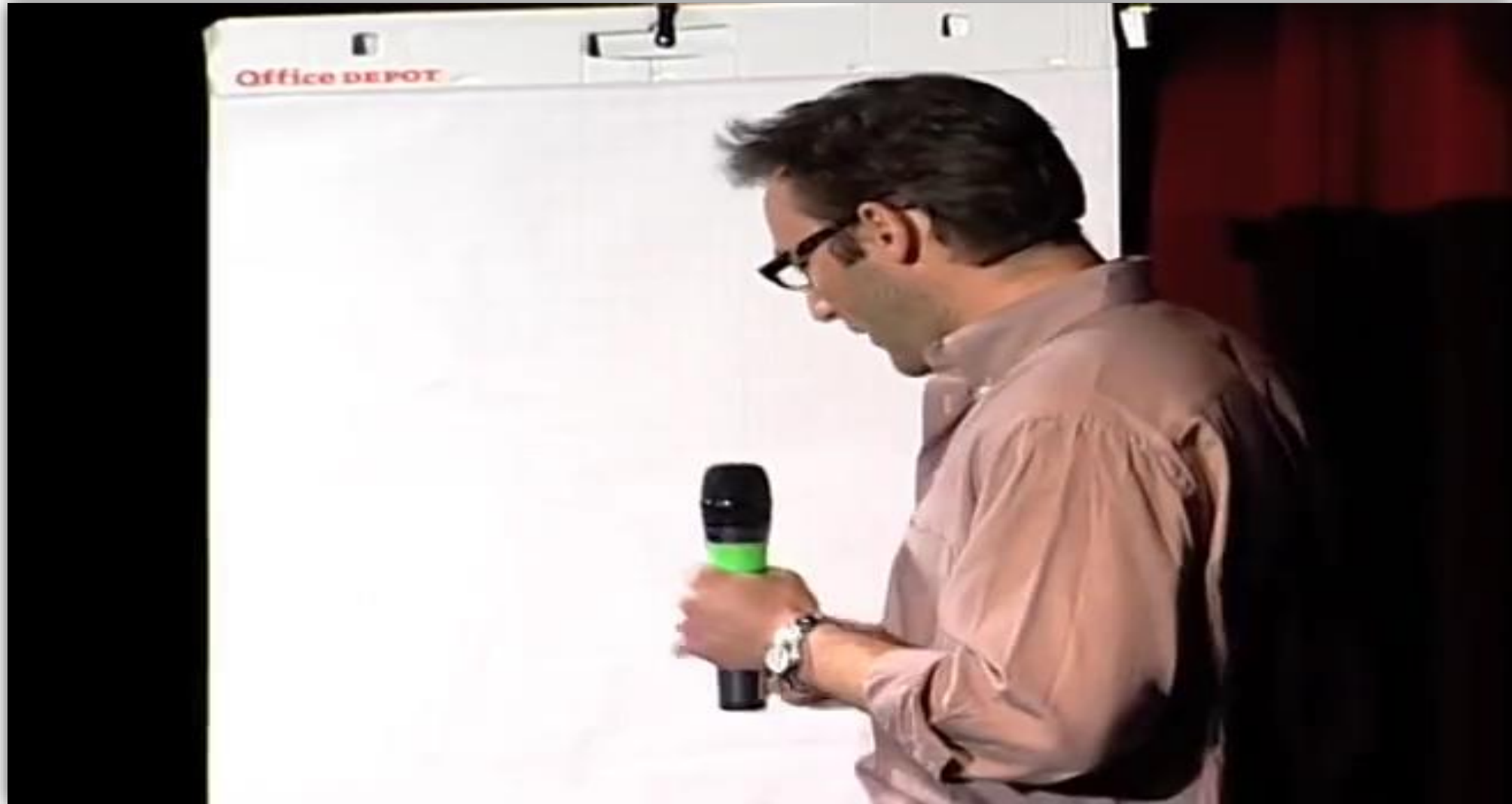
RESPECT, INTEGRITY, INNOVATION, EQUITY, SAFETY,  
AND COLLABORATION.



# What's Your WHY?



# *Start With Why*





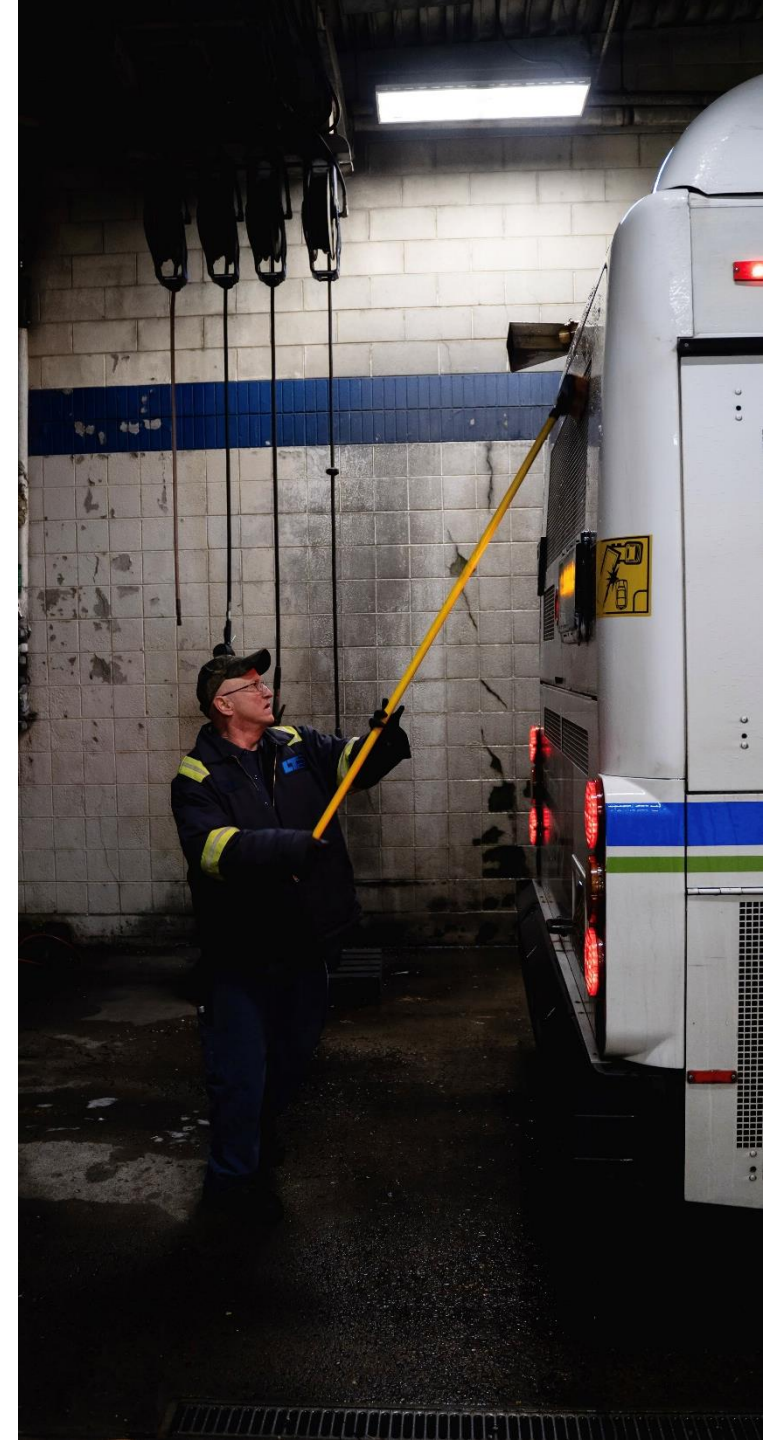
# What's Your WHY?



Why do you serve on the LTD Board?

*Choose 3-5 images scattered across the room that represent why you serve on the LTD Board.*

*Be prepared to discuss what your “Why” is and how the images you chose relate.*



# LTD's Current State



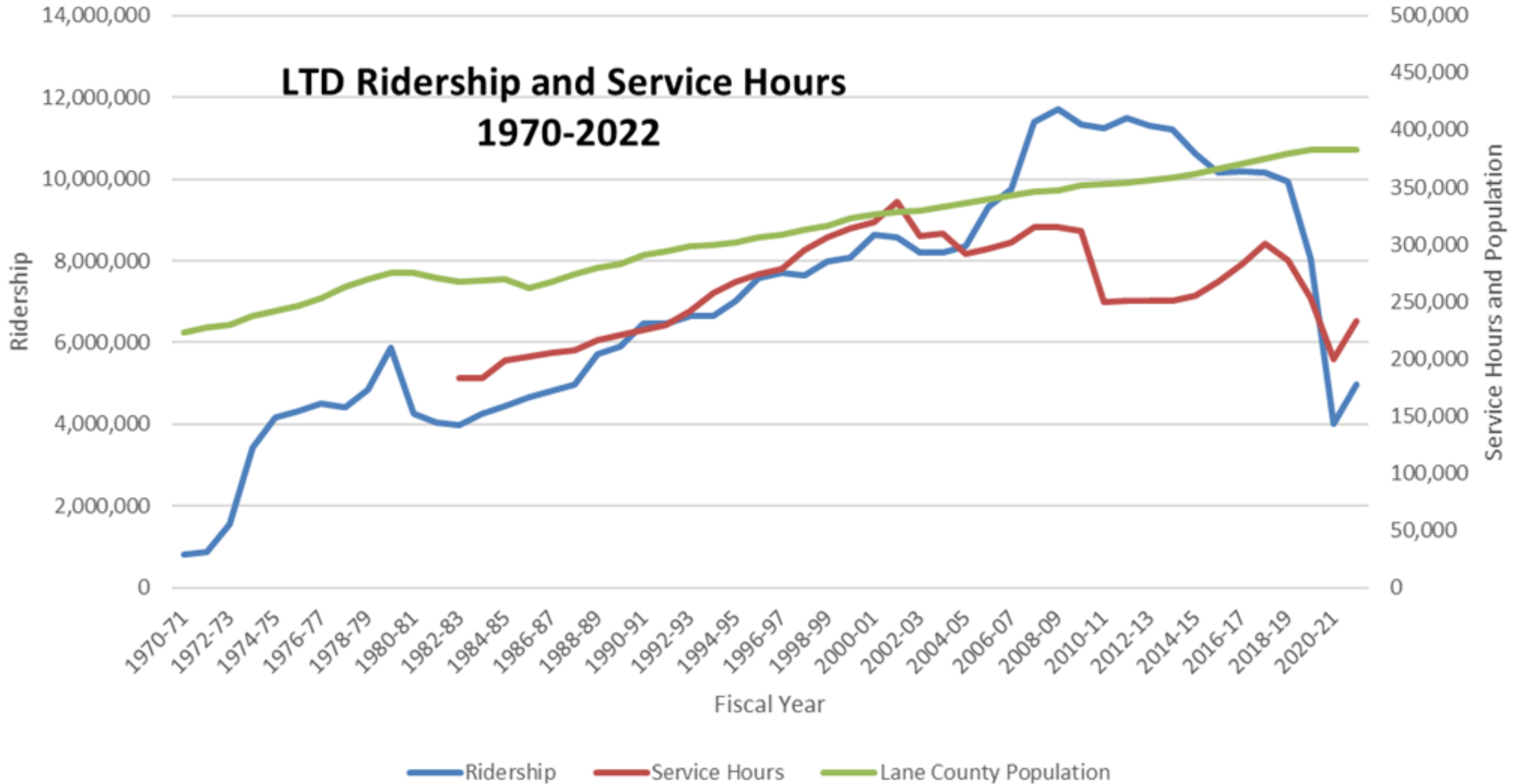
# Current State



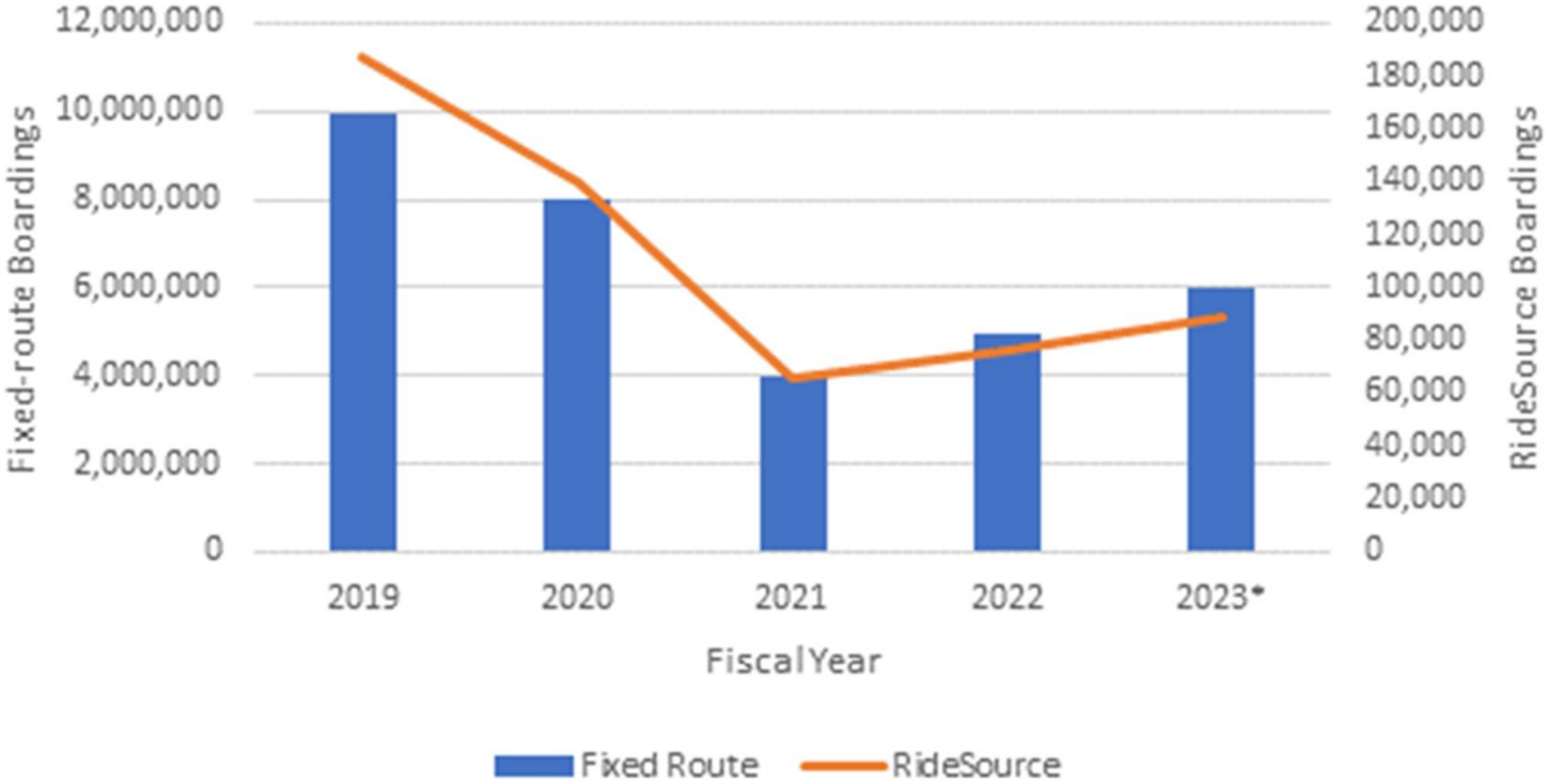
- Eugene, Springfield, and Lane County take advantage of state legislation passed in 1969 to request formation of LTD in 1970.
- Over the last 53 years, LTD has played a key role in development of the region's transportation system and, by extension, the economic development of the region as a whole.



# LTD Ridership and Service Hours 1970-2022



# 5-Year Historical Ridership



# BREAK



# Lane County Economic Outlook

LTD Board Retreat

Henry Fields

Lane & Douglas Workforce Analyst

November 29<sup>th</sup>, 2023

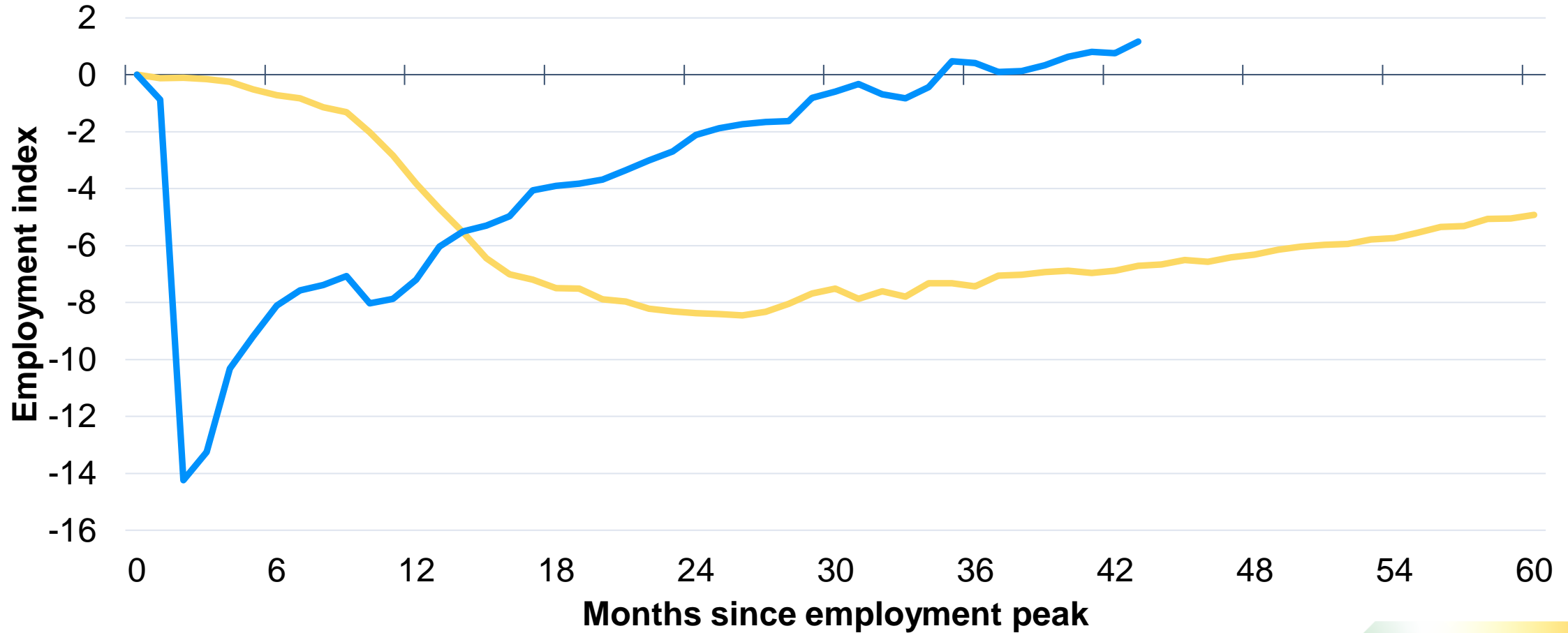
# Recovery & Job Vacancies



# Overall jobs recovery is fast by historical standards

## Oregon Job Change

— Great Recession — COVID

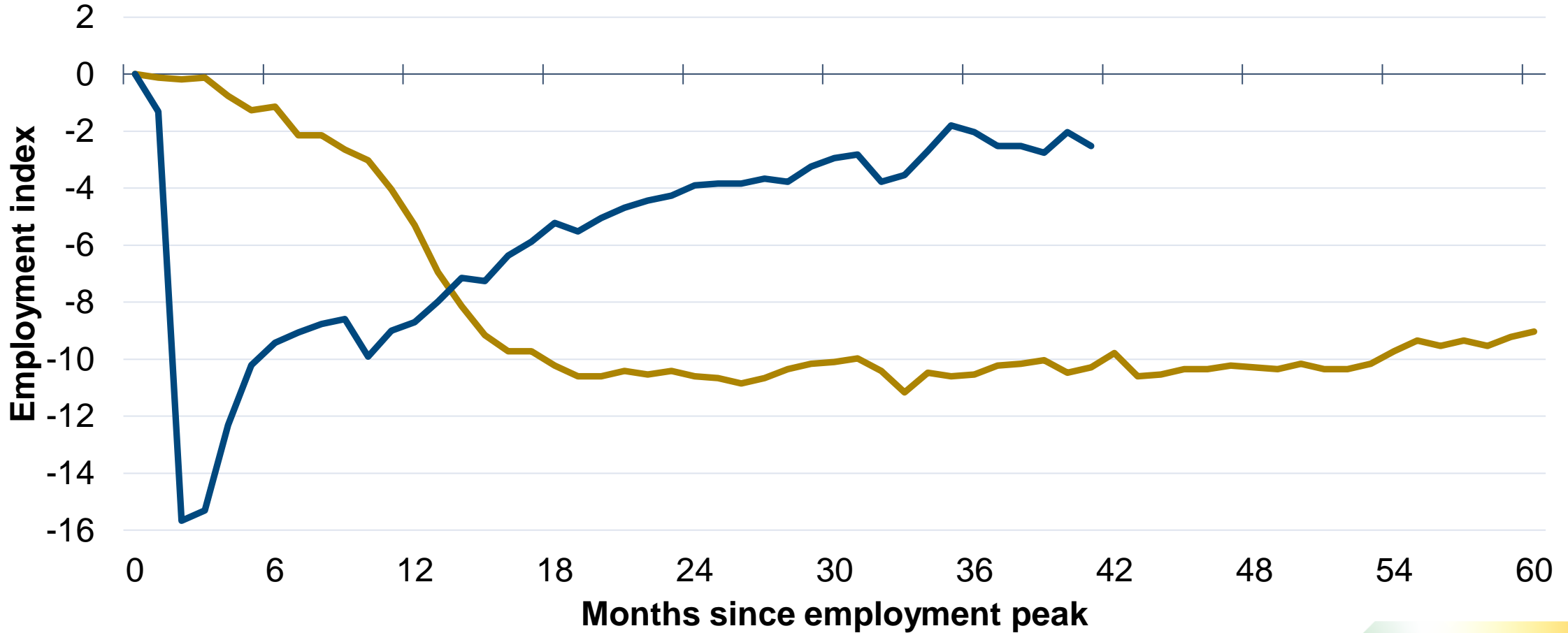


Source: Oregon Employment Department, Current Employment Statistics

# Overall jobs recovery is fast by historical standards

## Lane Job Change

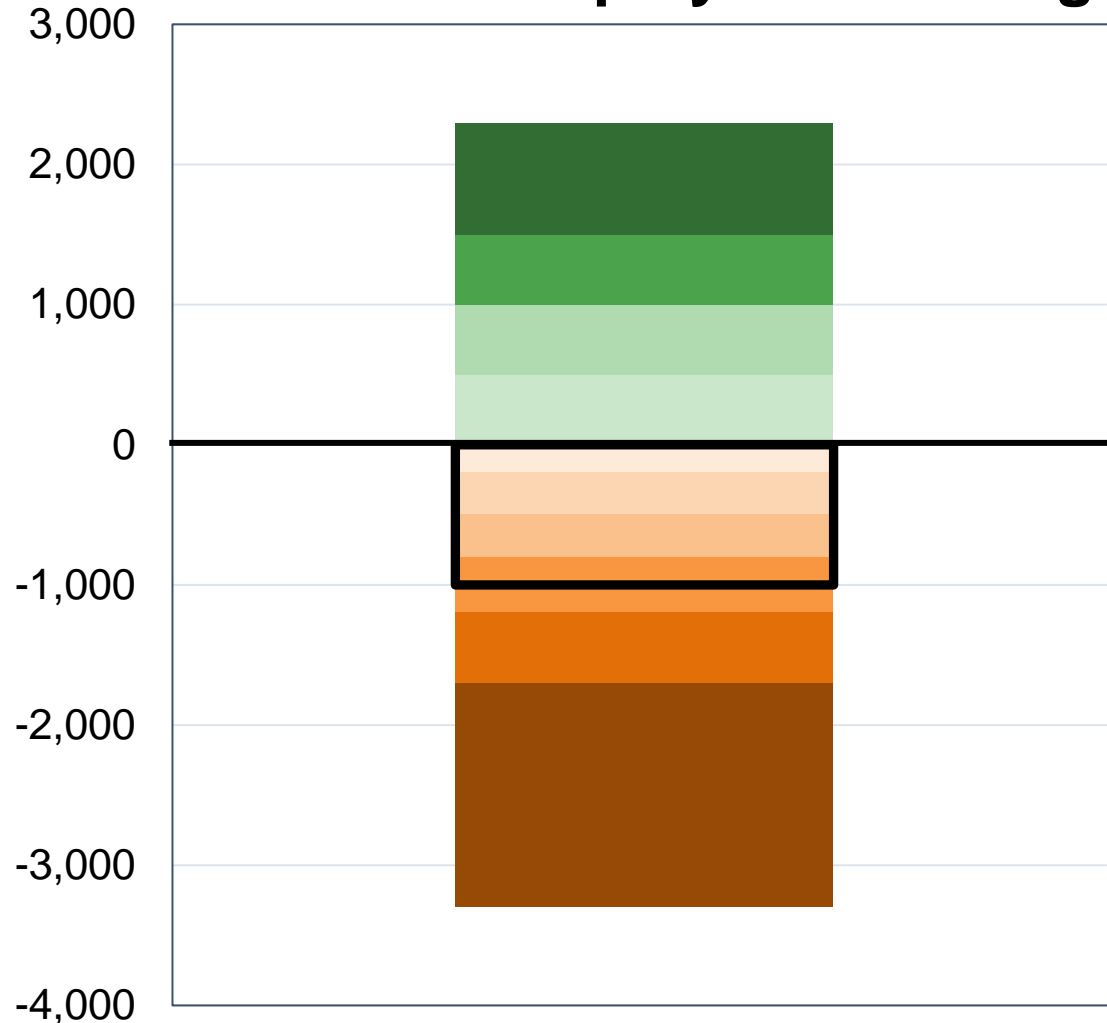
— Great Recession — COVID



Source: Oregon Employment Department, Current Employment Statistics

18

## Employment Change September 2019 to 2023

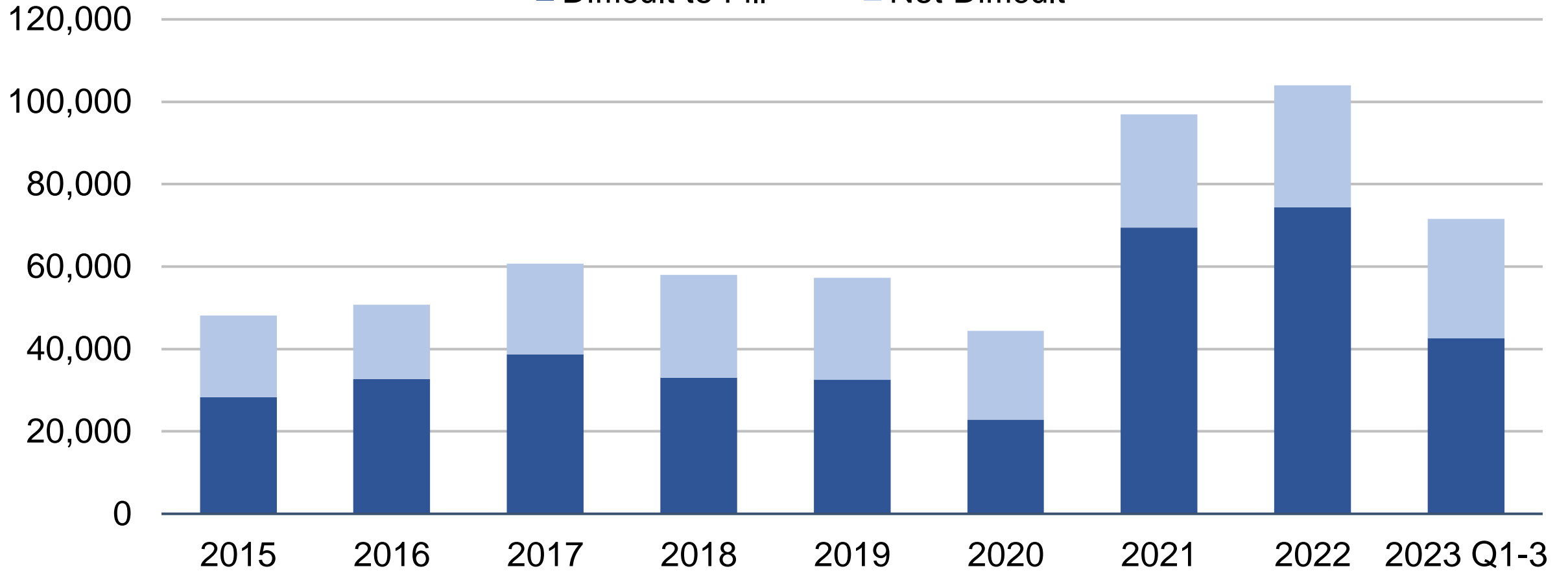


- Professional & business services (+4%), 800
- Financial activities (+6%), 500
- Government minus local education (+4%), 500
- Manufacturing (+4%), 500
- Total (-1%), -1,000**
- Other services (-4%), -200
- Information (-13%), -300
- Trade, transport, & utilities (-1%), -300
- Local education (-2%),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

# 2023 saw fewer job vacancies, but still elevated

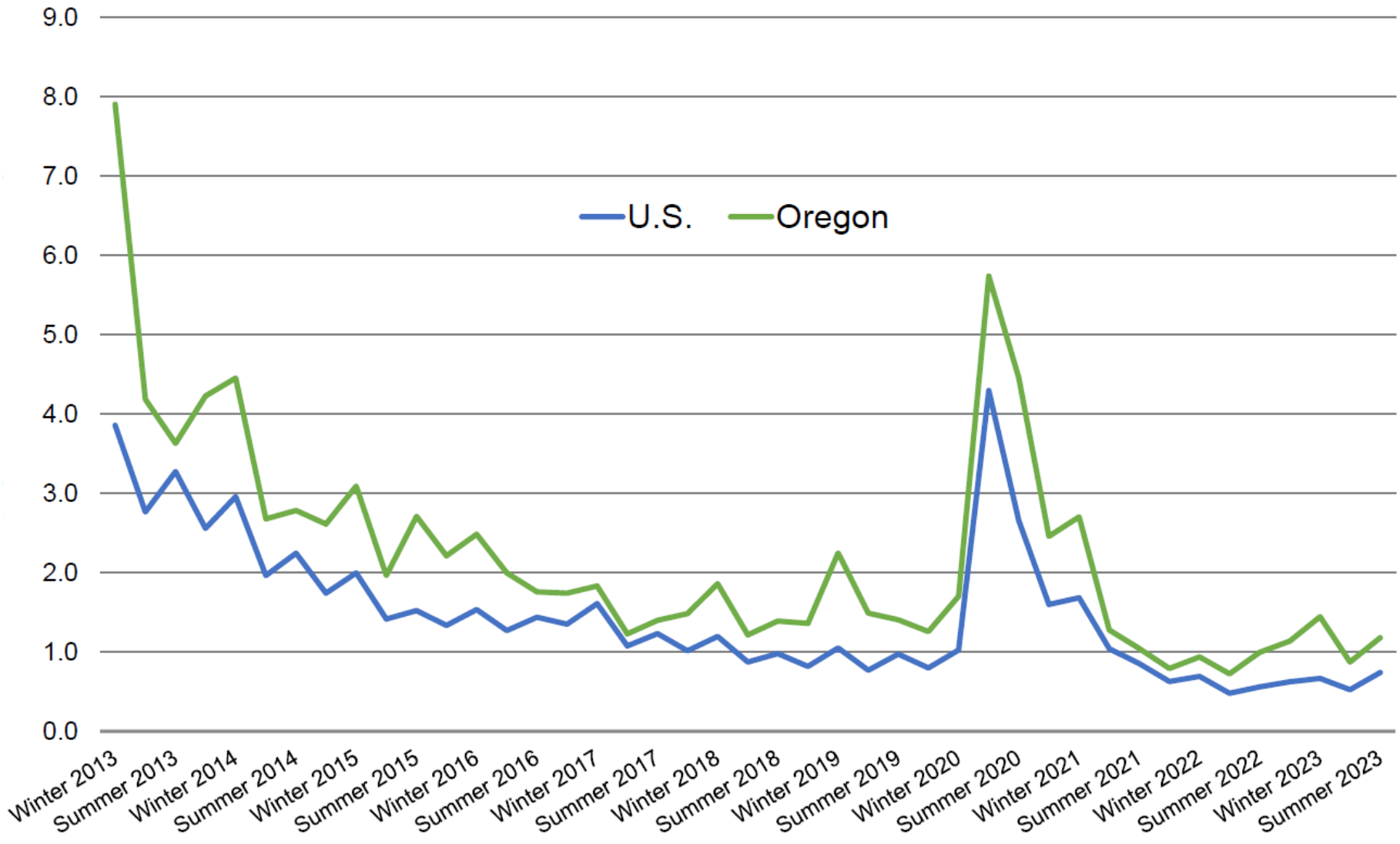
## Oregon Job Vacancies

■ Difficult to Fill    ■ Not Difficult



Source: Oregon Employment Department, Job Vacancy Survey

# Recent data shows a low jobseeker to vacancy ratio



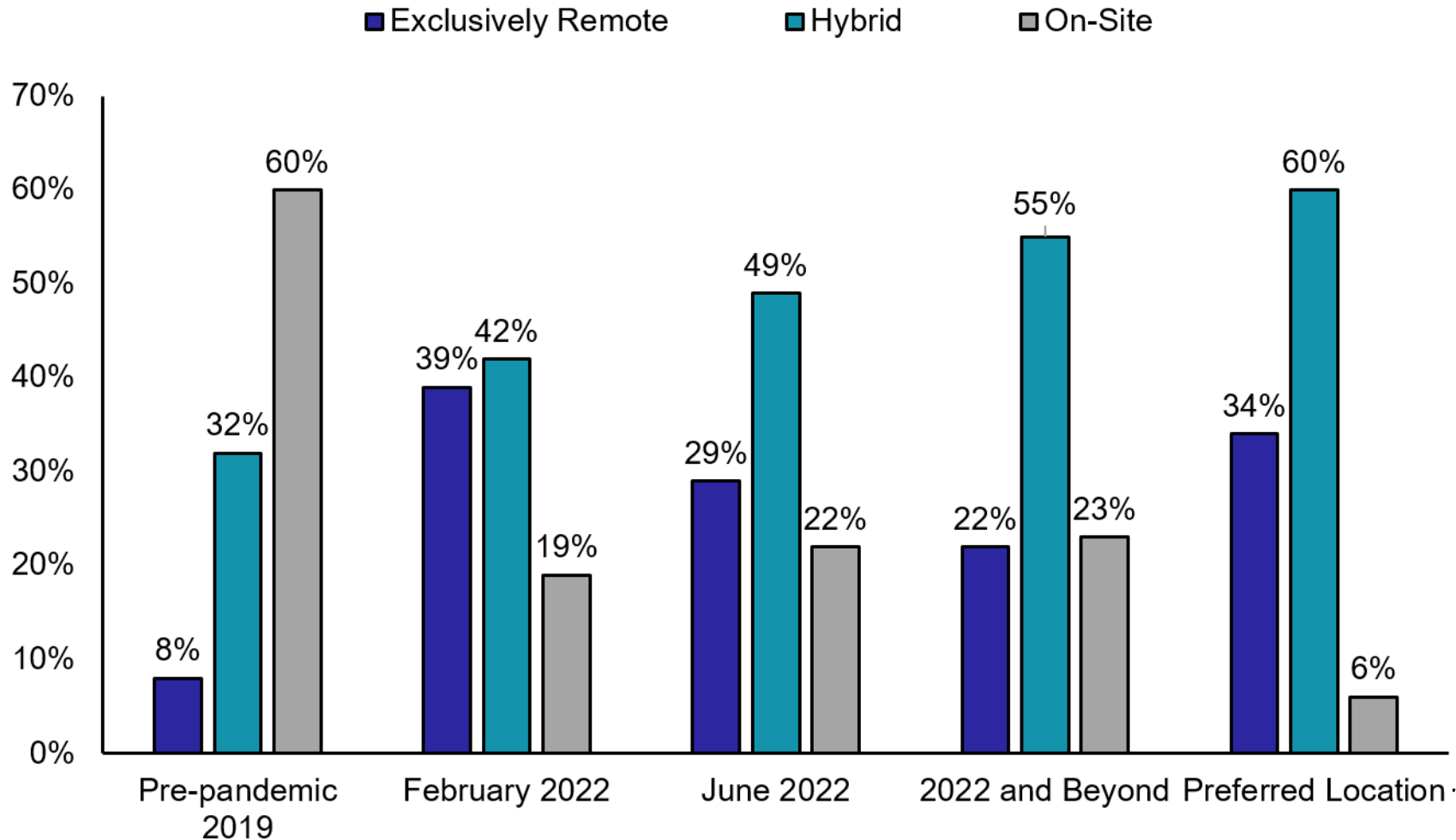
Number of unemployed people per private job opening

Source: Oregon Employment Department, Bureau of Labor Statistics

# Remote Work

# Remote work, when possible, is very popular

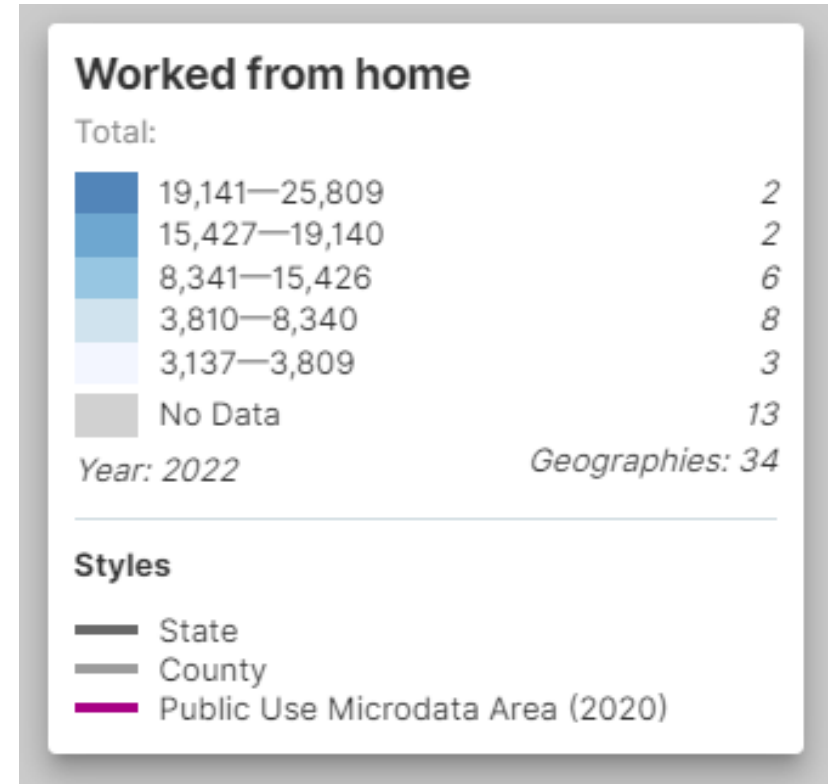
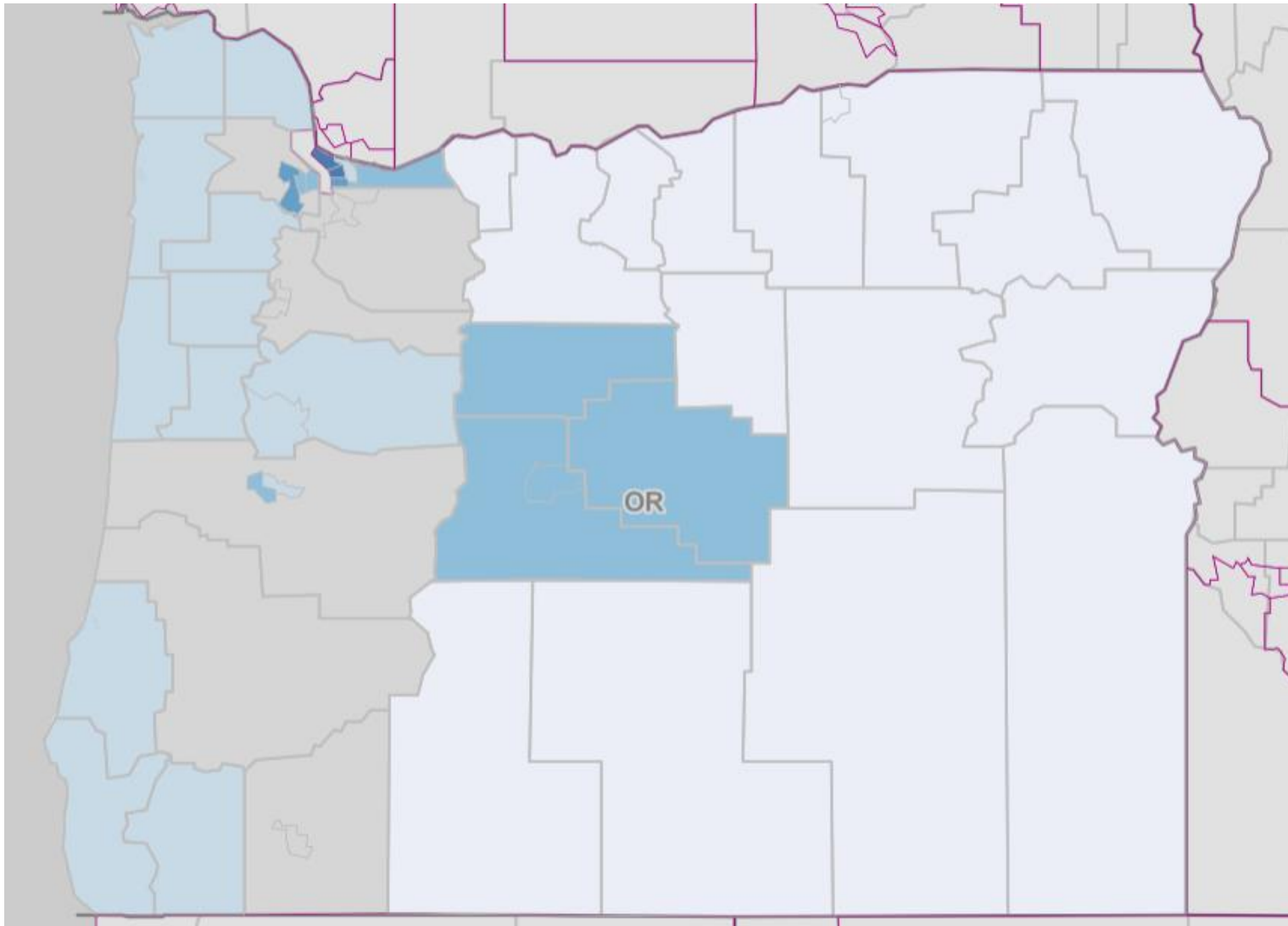
## Where do Remote-Capable Employees Expect to Work Long-Term and Where Would They Prefer to Work?



**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

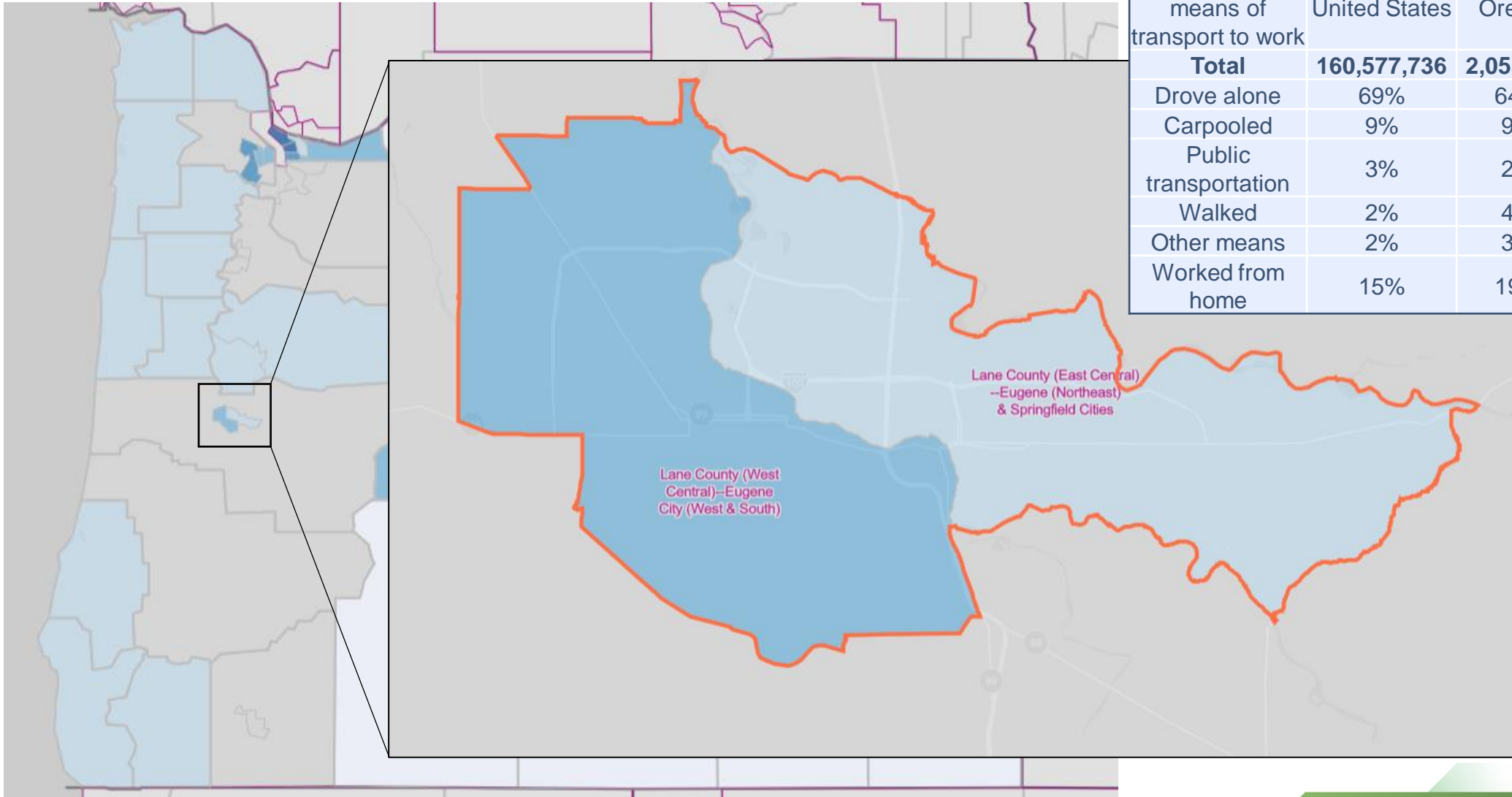


[Link to full data](#)

Source: U.S. Census Bureau, ACS 2022 1-year estimates table B08101



# 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
<b>Total</b>	<b>160,577,736</b>	<b>2,055,100</b>	<b>79,202</b>	<b>56,549</b>
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%

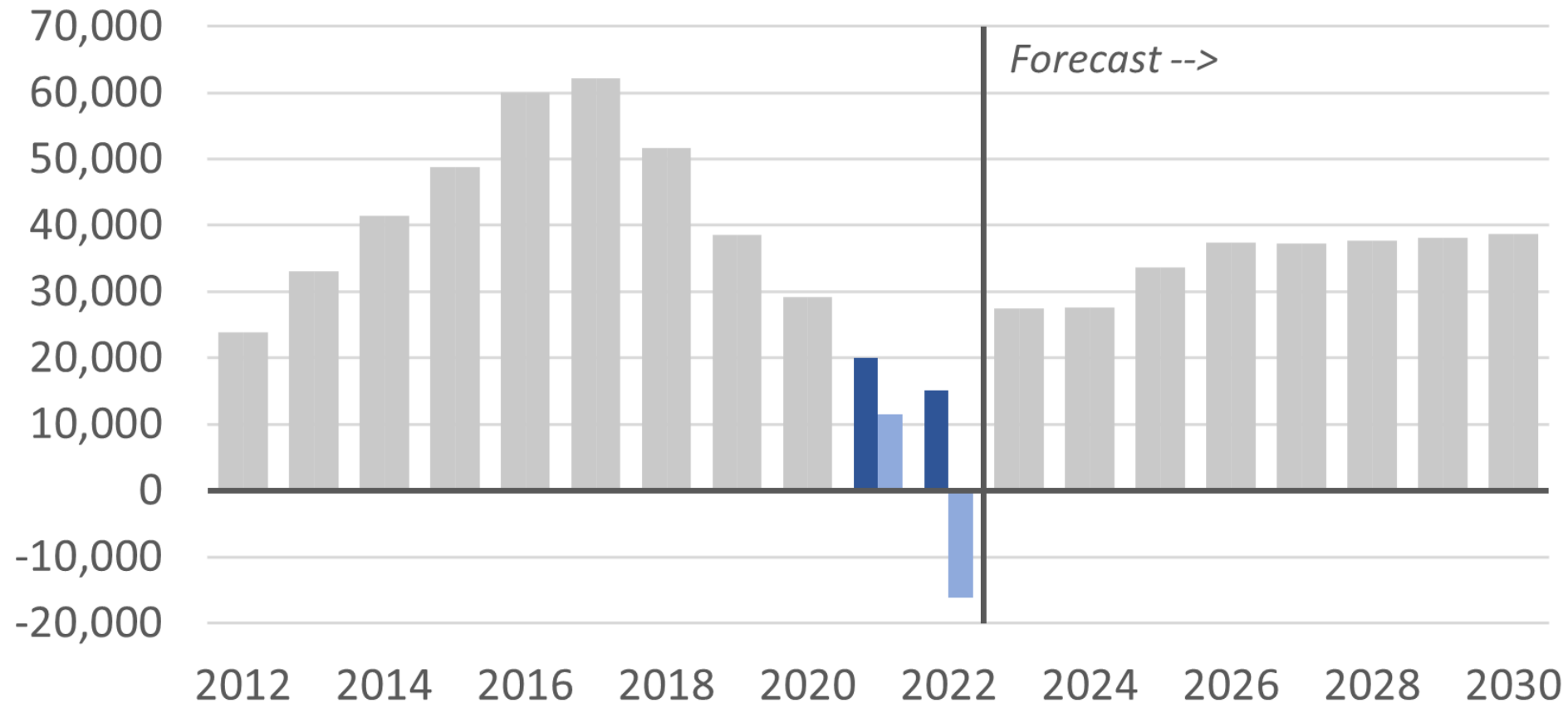
[Link to full data](#)

# 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**

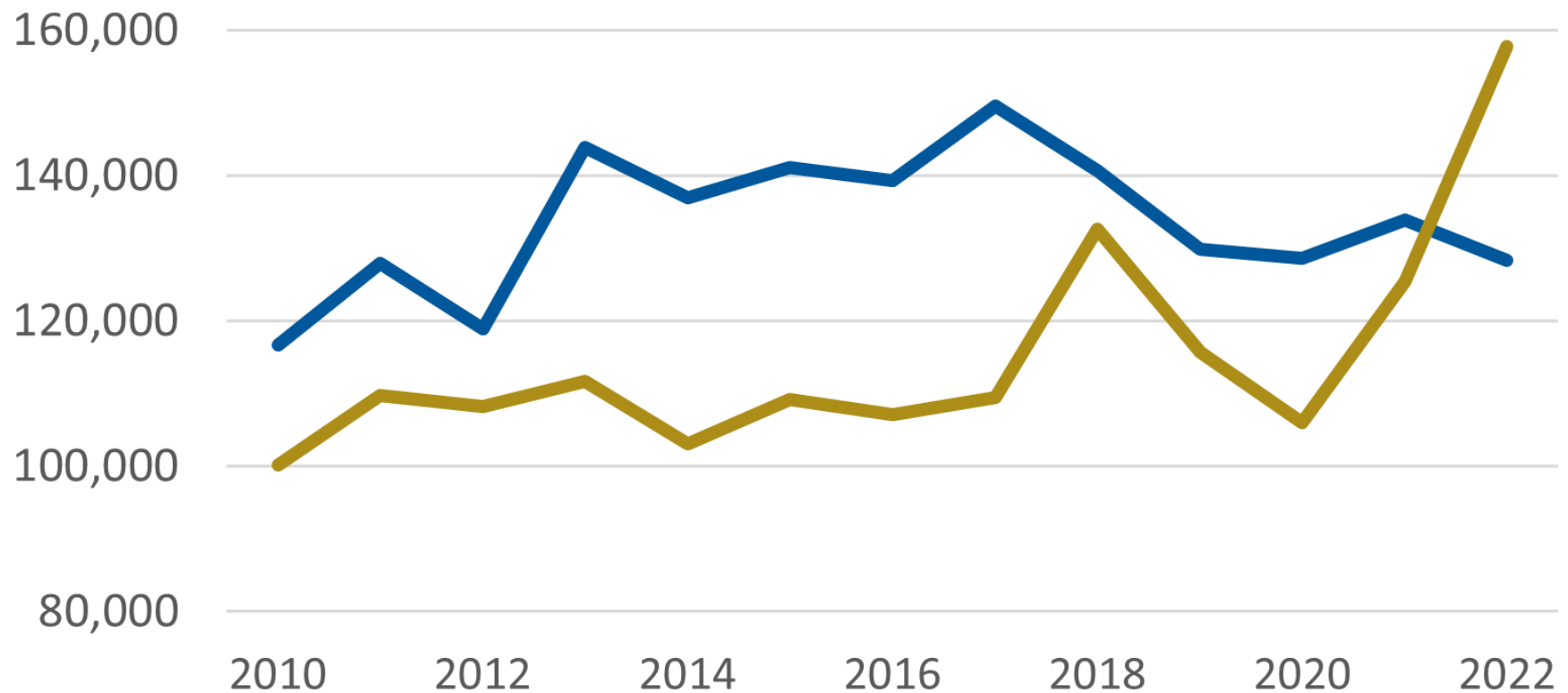


Source: Census, Portland State Population Research Center, Oregon Office of Economic Analysis

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

## Oregon Domestic Migration

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

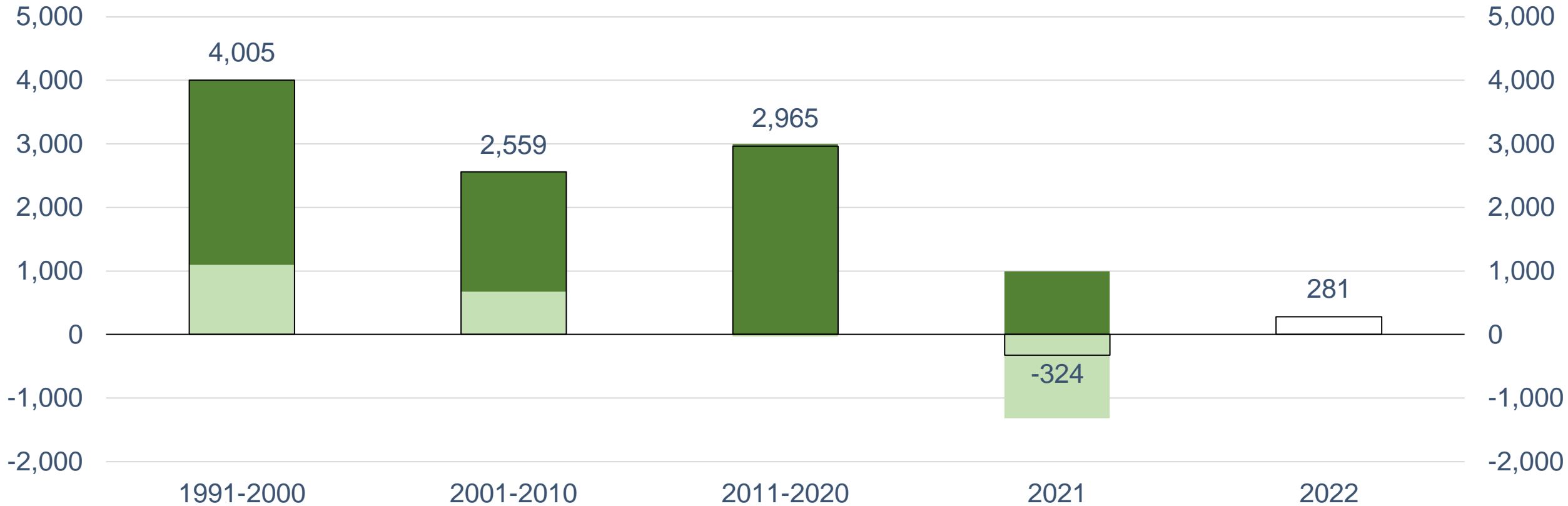


Source: Census, IPUMS-USA, Oregon Office of Economic Analysis

# Lane's population growth slowed significantly post-2020

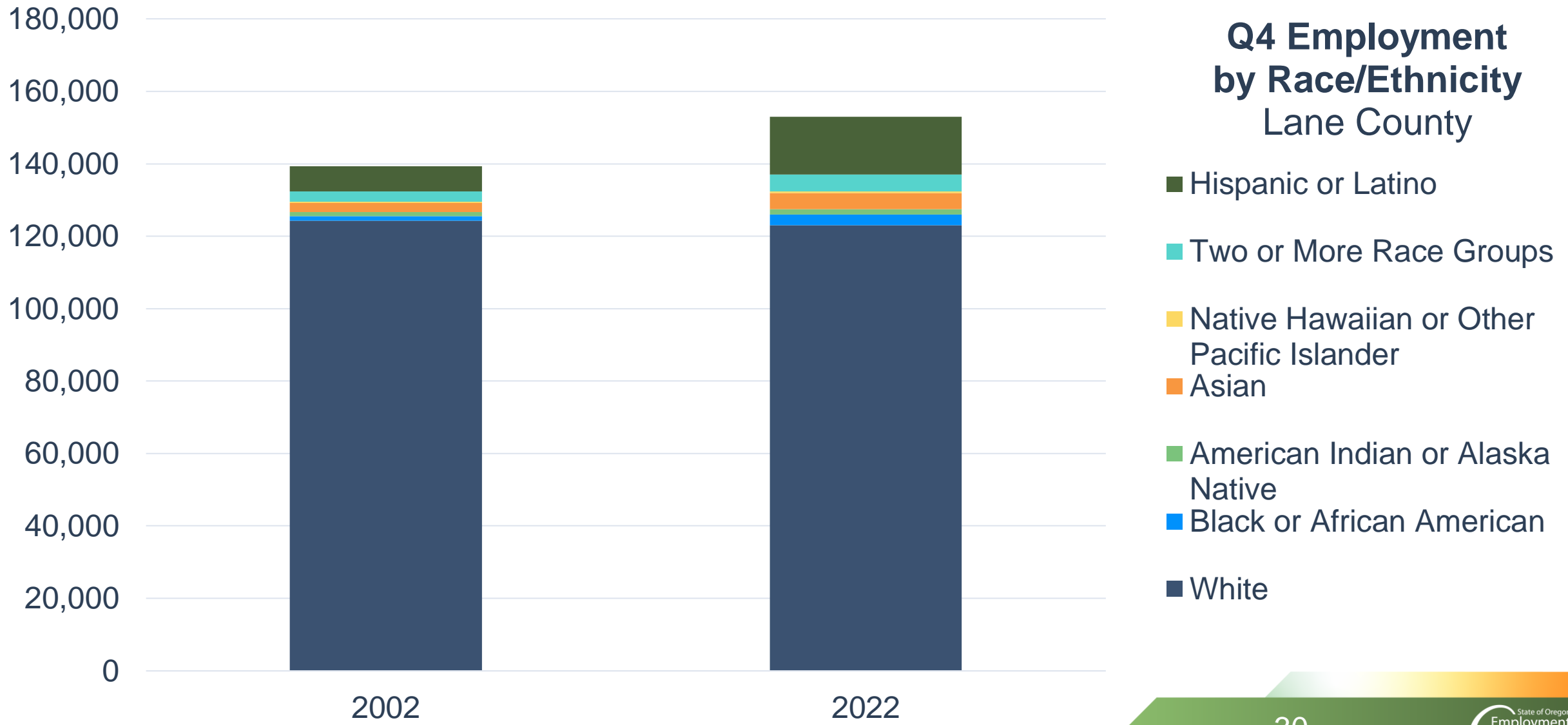
## Lane County Annual Population Change

■ Natural Increase ■ Net Migration □ Total



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

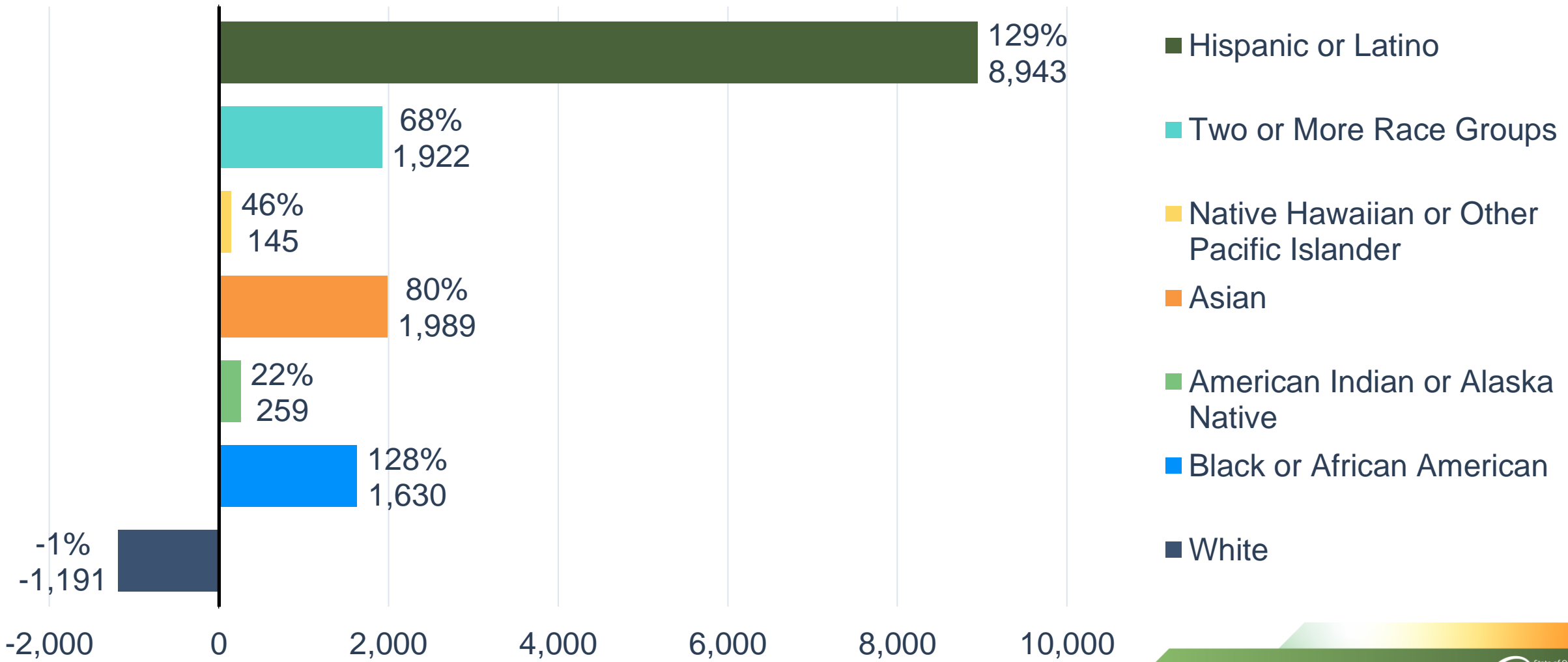
# Lane County's workforce is less racially diverse than the nation's



Source: U.S. Census Bureau Quarterly Workforce Indicators

# But the workforce is diversifying rapidly in recent years

## Net Change in Workers 2002-2022



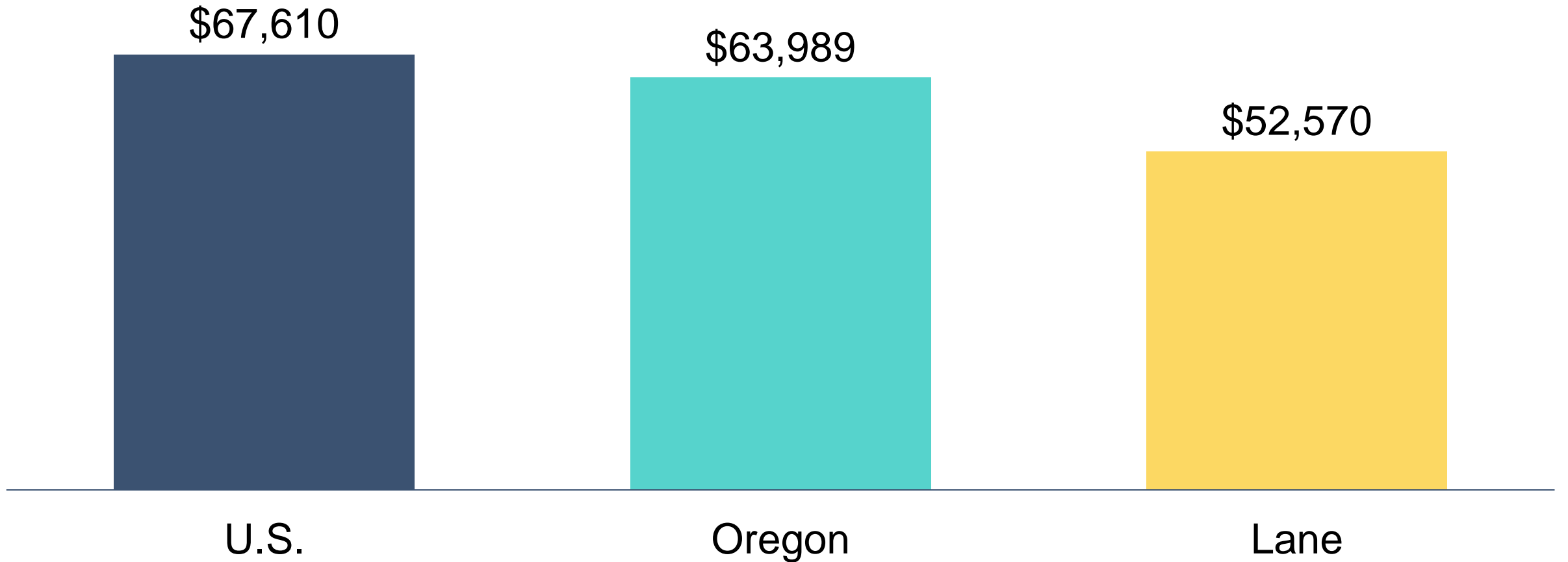
Source: U.S. Census Bureau Quarterly Workforce Indicators

# Economic Structure



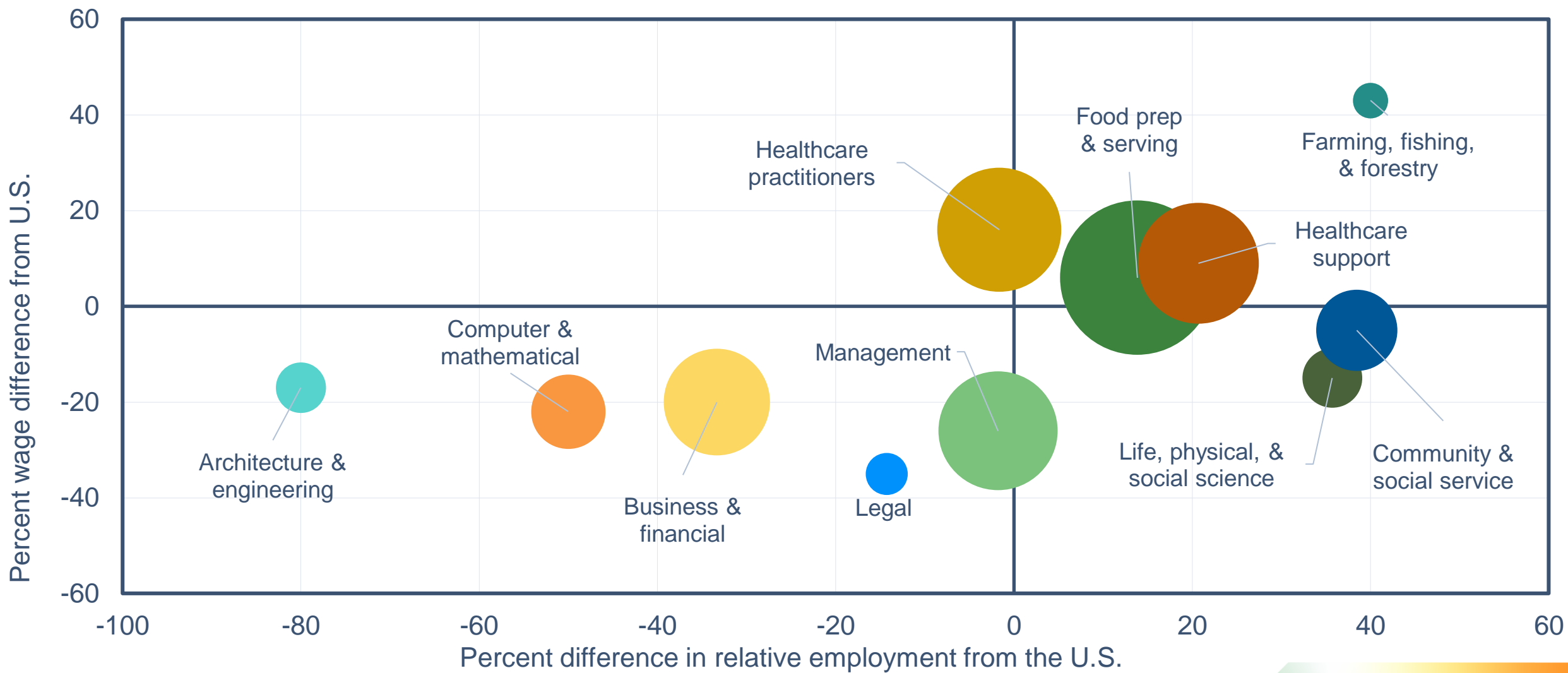
# Average wages are lower in Lane County

## Annual average wage per worker



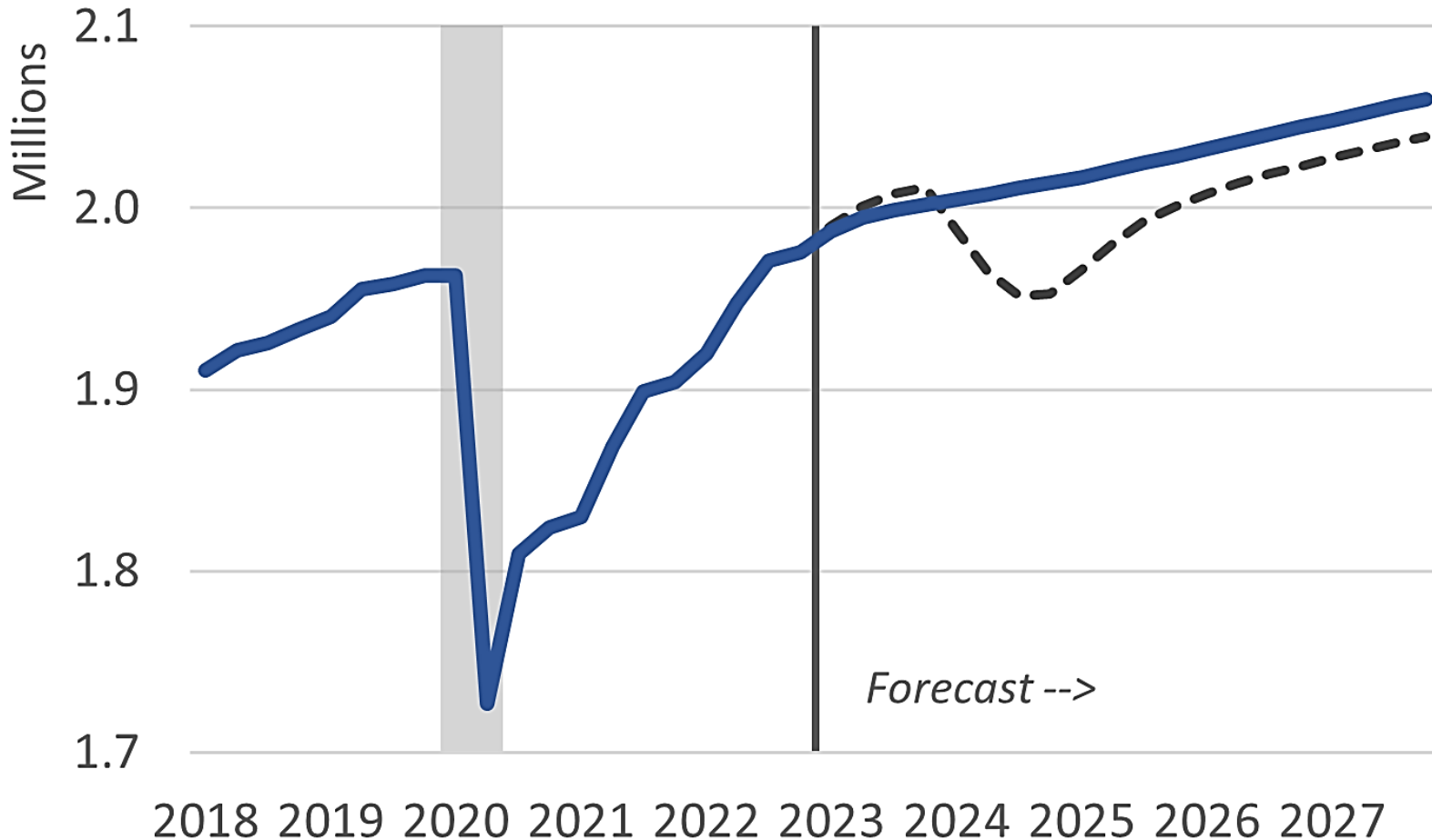
Source: U.S. Bureau of Labor Statistics and Oregon Employment Department, Quarterly Census of Employment and Wages

# Much of the wage gap comes from differences in job type



Source: Oregon Employment Department, Bureau of Labor Statistics, Occupational Employment and Wage Statistics

## Baseline Soft Landing and Boom/Bust Alternative Scenario



Source: Oregon Office of Economic Analysis

Cross currents make prediction complicated, but consensus is guarded optimism

Strong labor market  
(Difficulty finding workers)

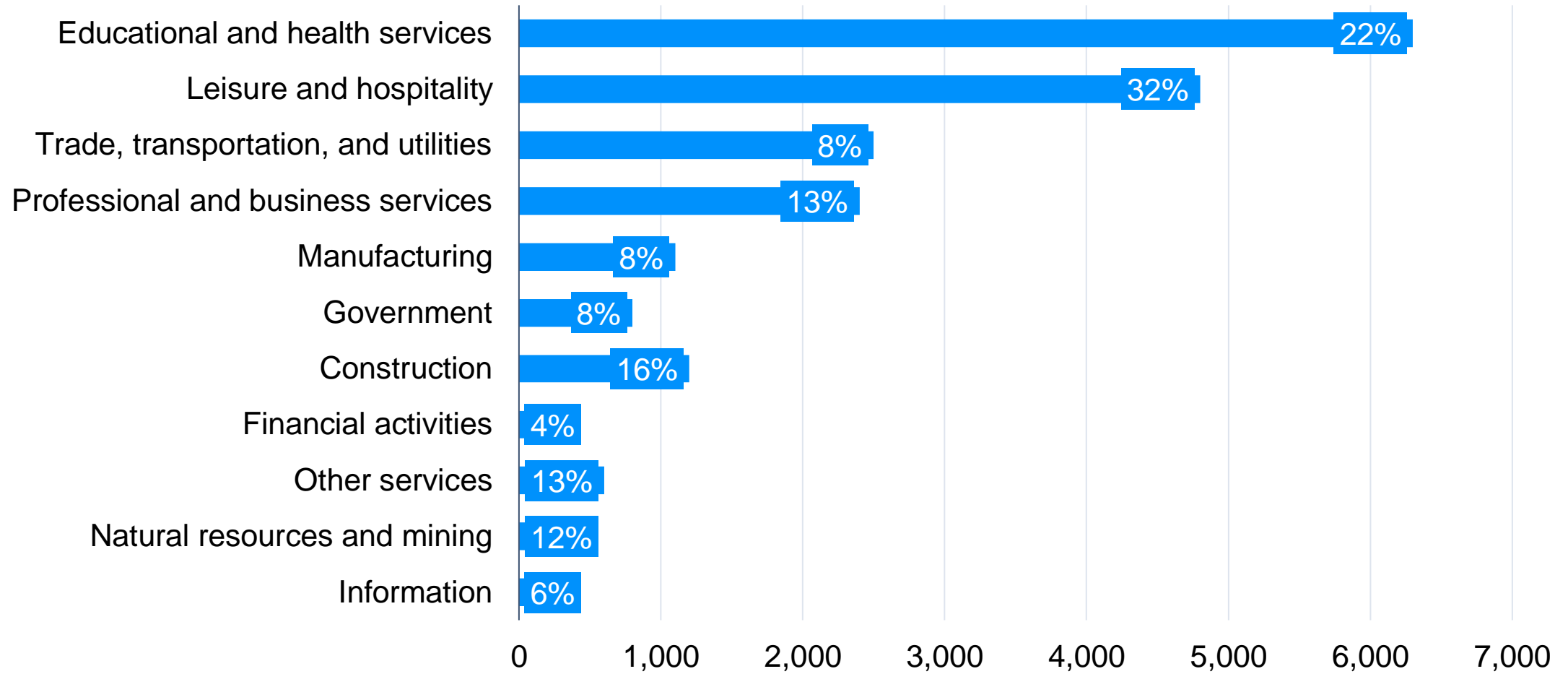
Cooling inflation  
(Inflation remains elevated)

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

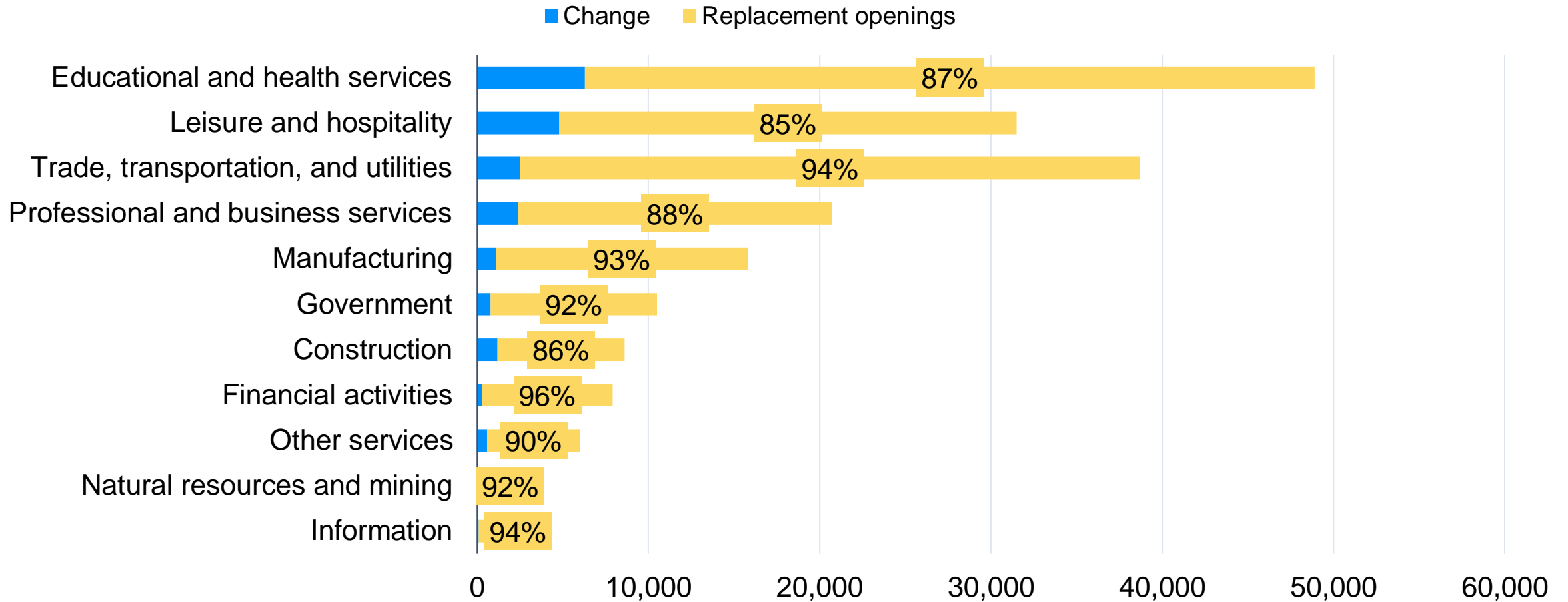
Lane County Projected Job Change, 2021-2031



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

# The vast majority of job openings are due to replacement

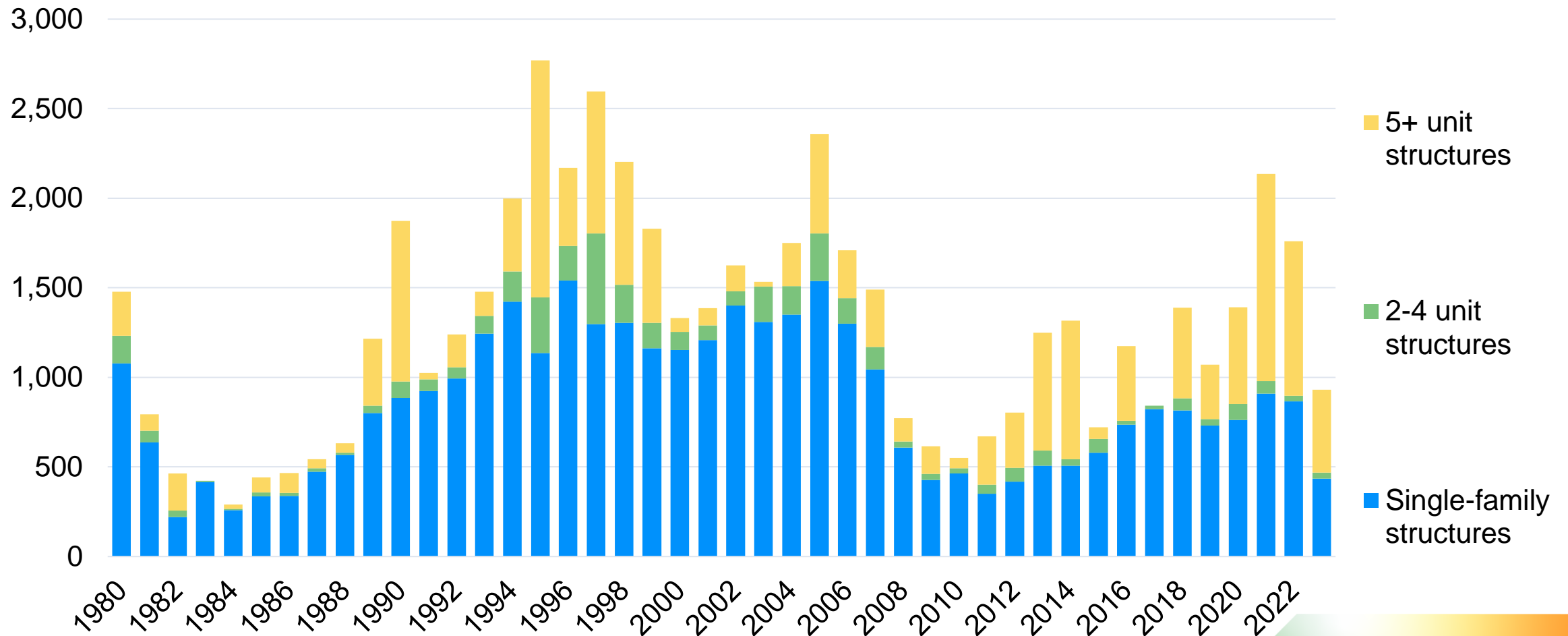
## Lane County Projected Job Change, 2021-2031



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

# Housing production lags previous decades

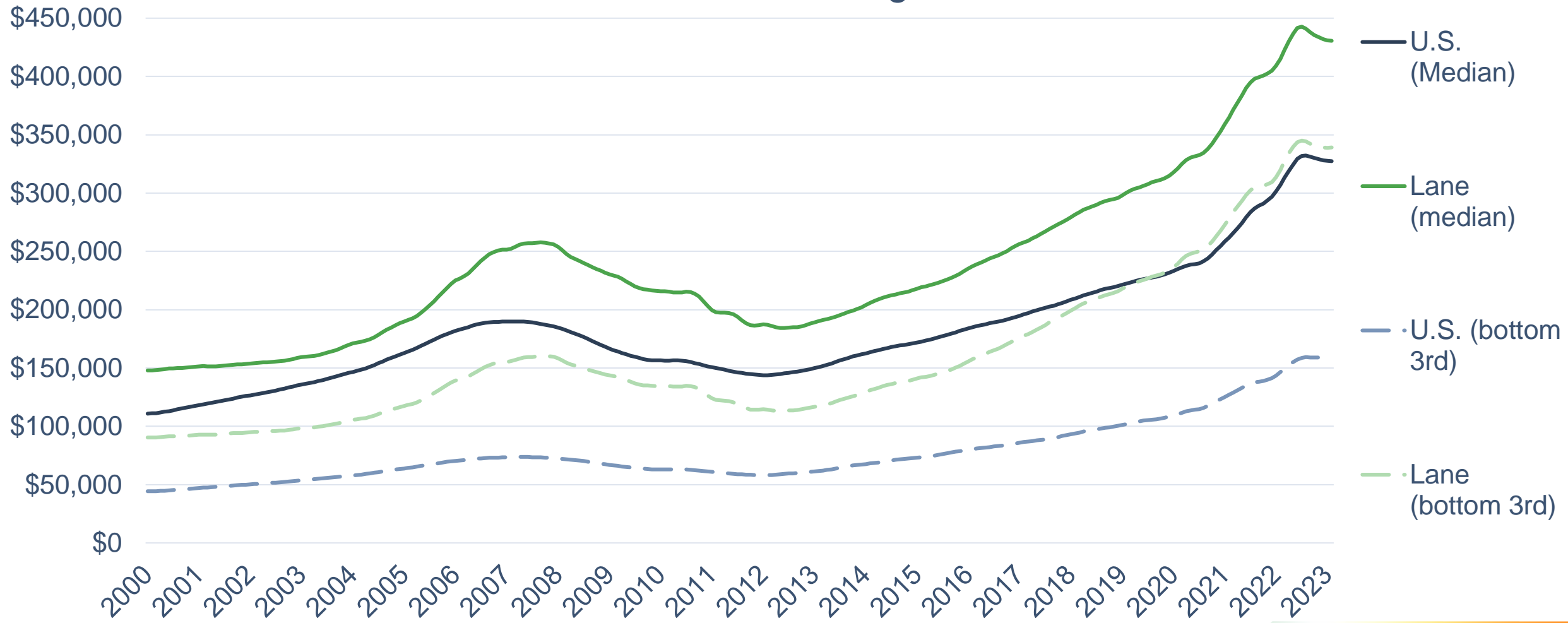
## Housing units permitted by size of structure Lane County, 1980 - Jul. 2023



Source: U.S. Census Bureau Building Permits Survey

# Housing costs have risen, particularly on the affordable end

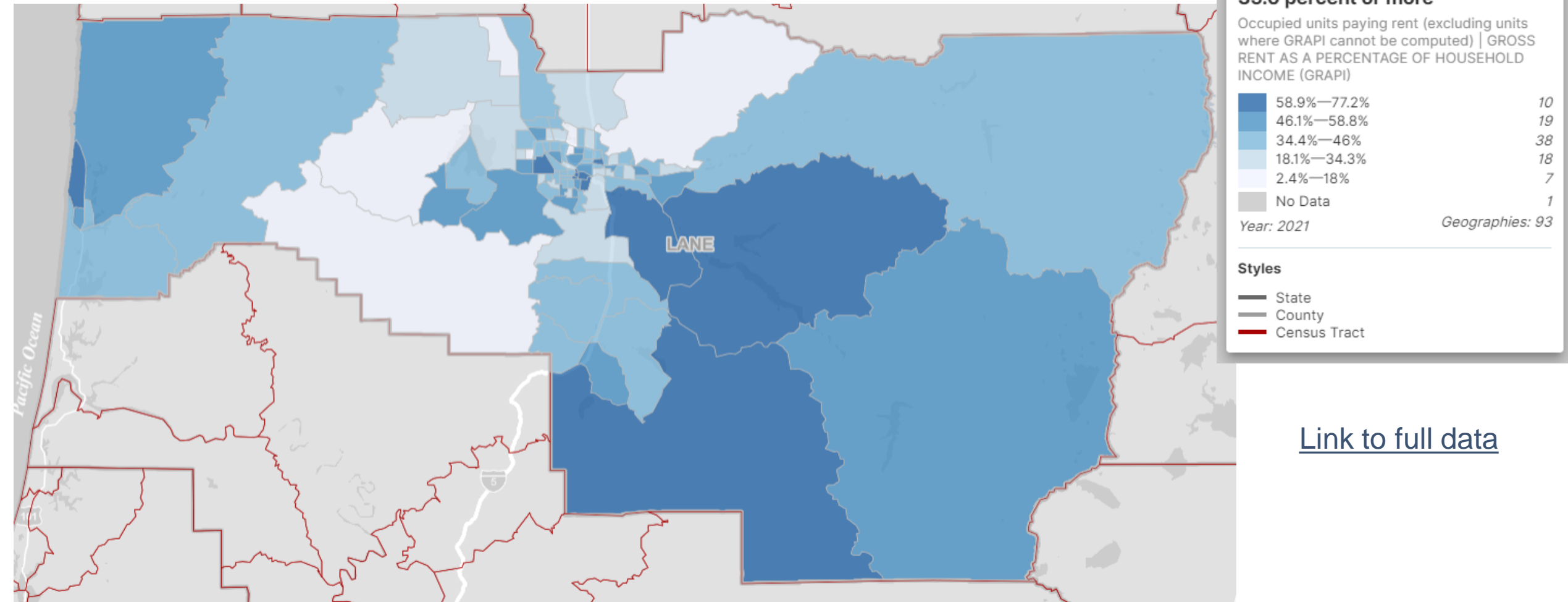
## Median Housing Value



Source: Zillow Research

# Rent affordability varies by geography and income

## Percent of households paying 35 percent or more of household income on rent

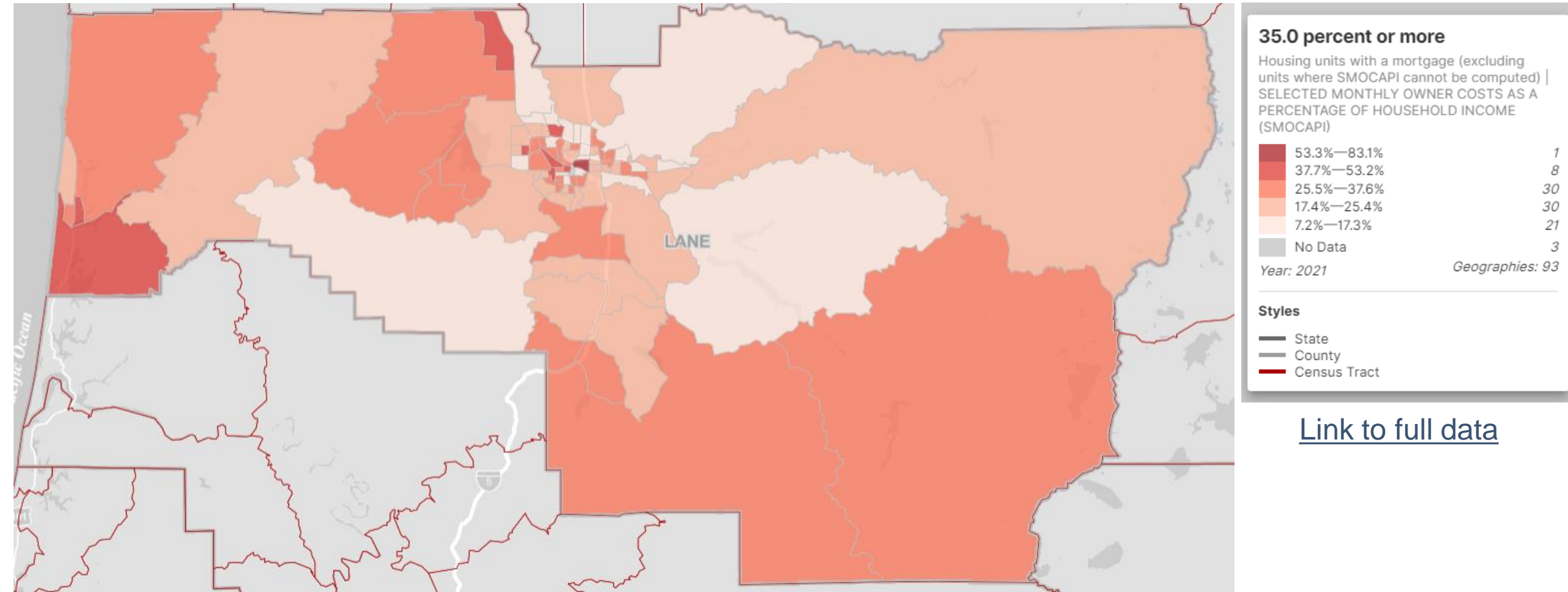


[Link to full data](#)



# Affordable homeownership is distributed differently as well

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

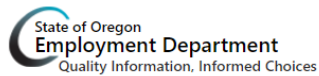


[Link to full data](#)

Source: U.S. Census Bureau, ACS 2021 5-year estimates table DP04

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## OUR LATEST RESEARCH



### Oregon's Nonprofits in 2022

Dallas Fridley Nov 17

A not-for-profit corporation, commonly referred to as a "nonprofit," is organized to achieve a purpose other than to generate a profit. These entitie...

- Nov 3 [A Snapshot of Oregon Firms by Size Class, 2023](#)
- Oct 31 [Employment Among Oregon's Veterans](#)
- Oct 18 [Psilocybin Services: Oregon's Newest Industry Begins Popping Up](#)
- Oct 17 [Summer 2023 Hiring Among Oregon's Private Employers](#)
- Oct 11 [Plumbers Can Find Top Wages in Oregon](#)
- Oct 2 [Oregon Economic Update: The Elusive Soft Landing](#)

[More Articles](#)

## 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%

## JOB & CAREER SEARCH

## Qualityinfo.org

- Analysis and articles
- Occupational and wage data
- Industry data and business lookup tools

# Henry Fields

Workforce Analyst, Lane and Douglas counties

[Henry.L.Fields@employ.oregon.gov](mailto:Henry.L.Fields@employ.oregon.gov)

(541) 359-9178

Recent Publications and Presentations

# Community Outcomes Facilitated Discussion



# Community Outcomes Facilitated Discussion



## Top Community Priorities

Housing and Public Safety  
Economic and Workforce  
Development  
K-12 Education  
The Unhoused



## How can LTD better collaborate?

Be Present and Active in  
Community Organizational  
Engagements  
Champion data-driven plans to  
collectively align organizations on  
actionable outcomes



## LTD's Collaborative Opportunities and Challenges

Opportunity to collaborate on  
workforce development and  
economic development programs  
through sharing expertise and data  
Facing the challenge of conflicting  
priorities across regional jurisdictions  
and public narratives



## How can LTD be a stronger partner?

Continue pursuing the service-  
oriented culture shift at LTD  
Continue being present and  
asking for input

# Community Outcomes Facilitated Discussion

*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?*



# Mobility Management: Centering on People






**Commute 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.”*



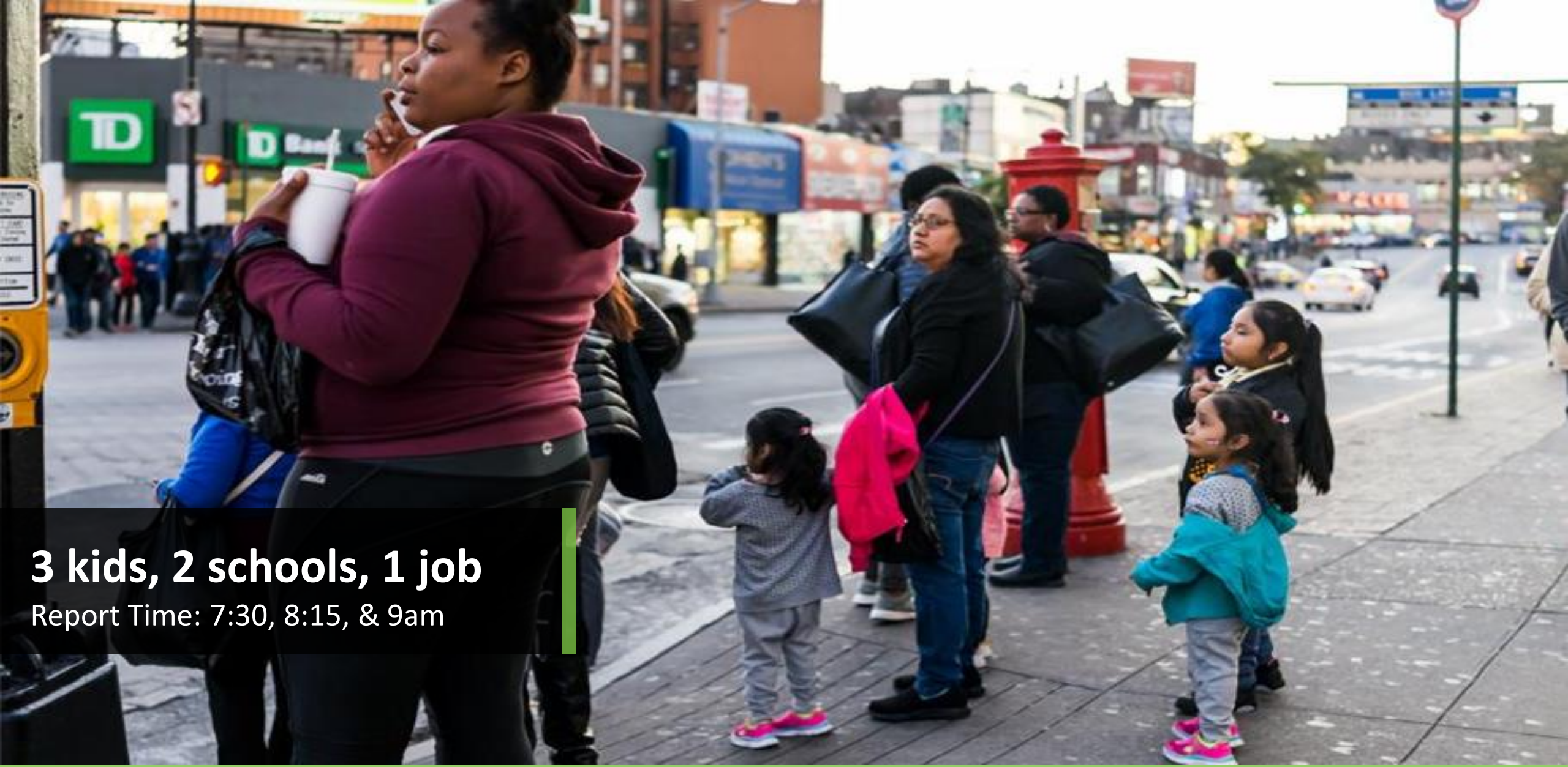
Transit is the backbone of any sustainable public mobility system....

...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



Lane Transit District

LTD.org



**Family, appointments  
and life**



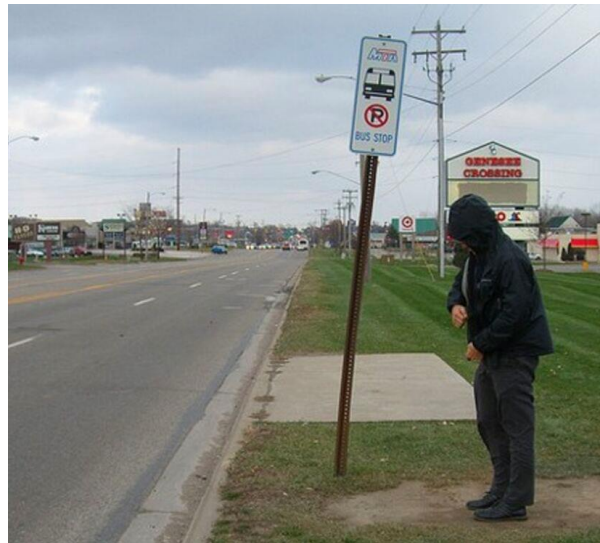
**Responsiveness**



**Redundancy**



**Respect**



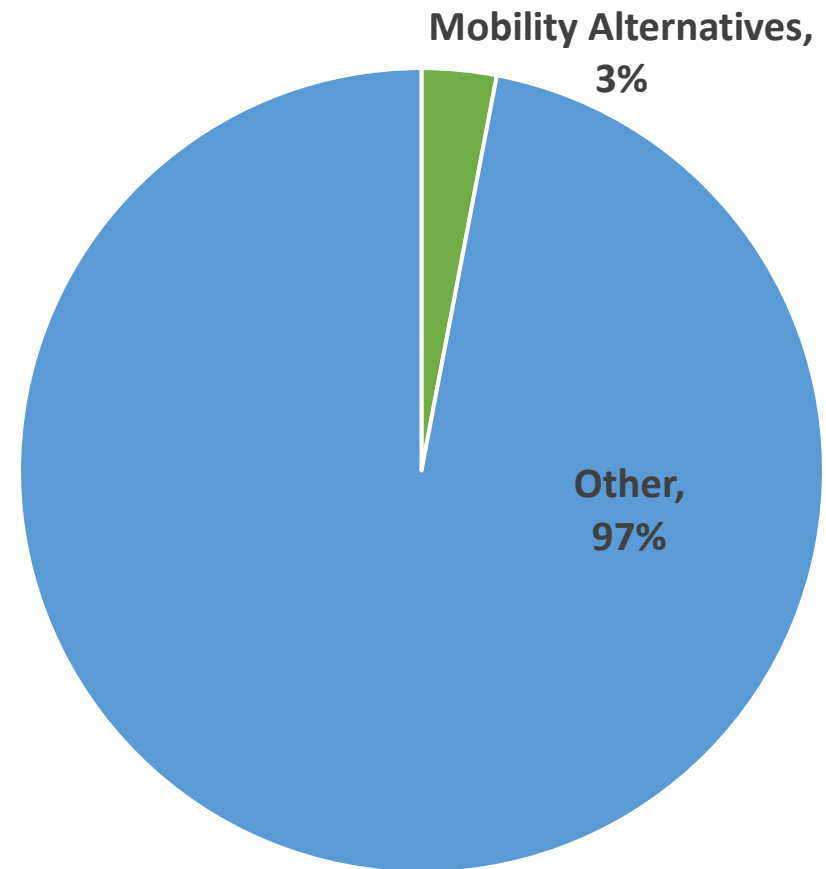
**Resiliency**



**Mobility is Precarious**

# Where are we now?

- Mobility Alternatives capture 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 (?)



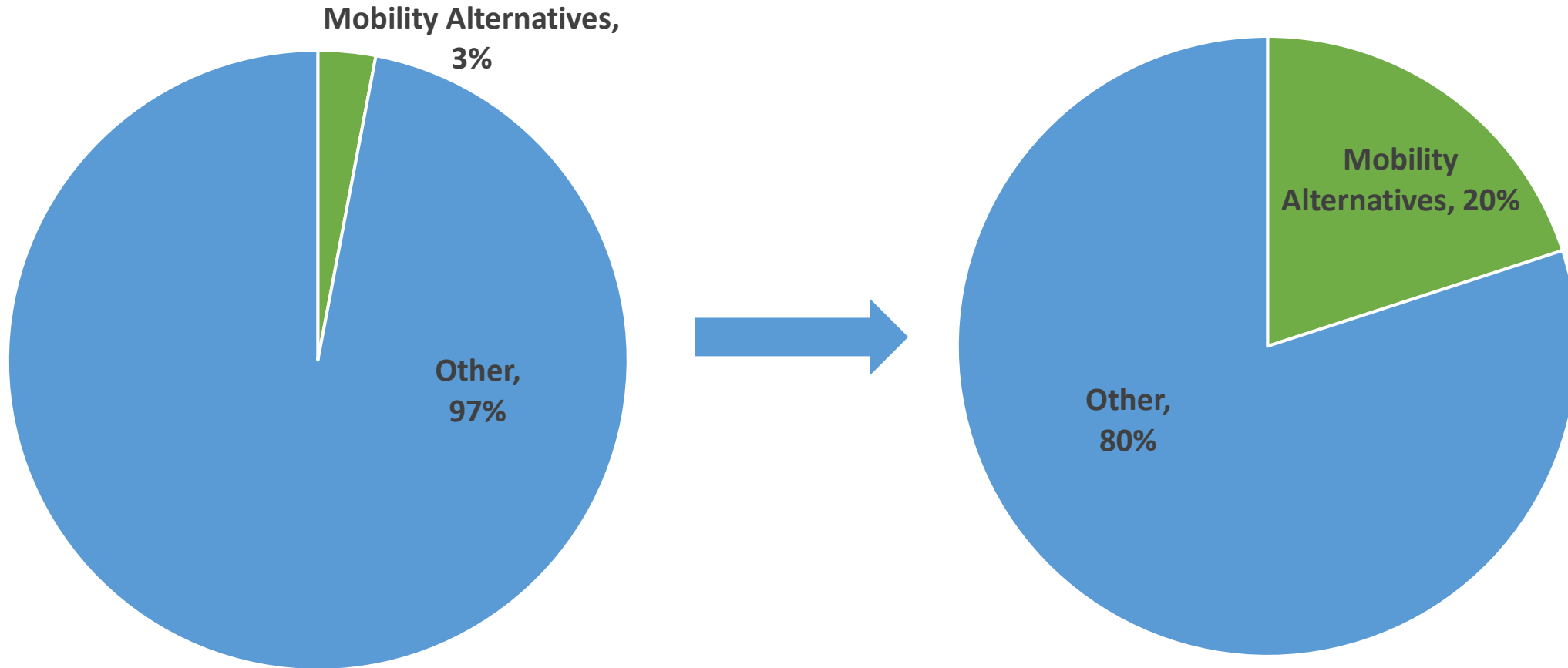
# BHAGs are Transformative

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

- Steve Jobs



# What is LTD's mobility BHAG?



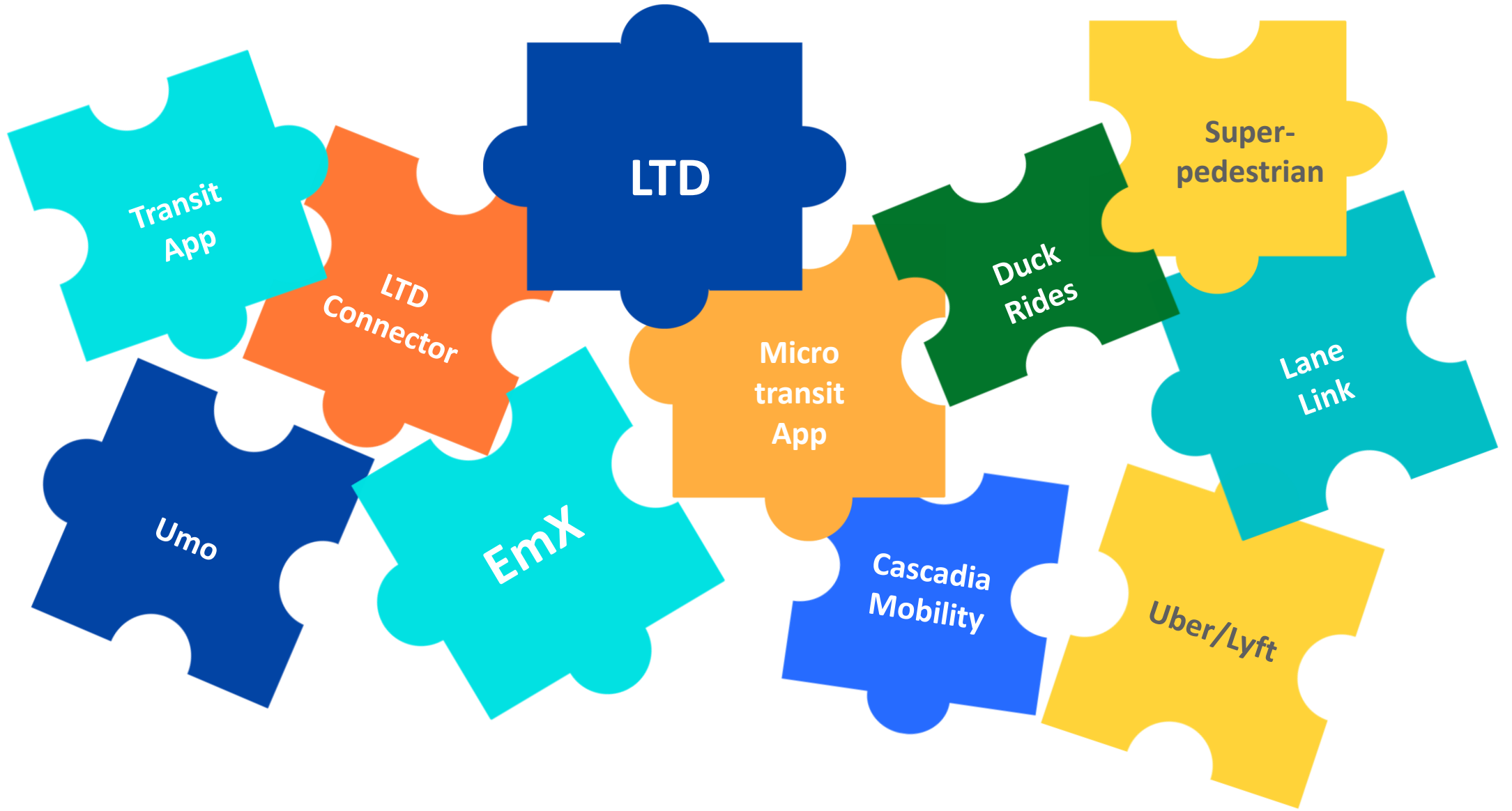
Options have grown...



...so has complexity.

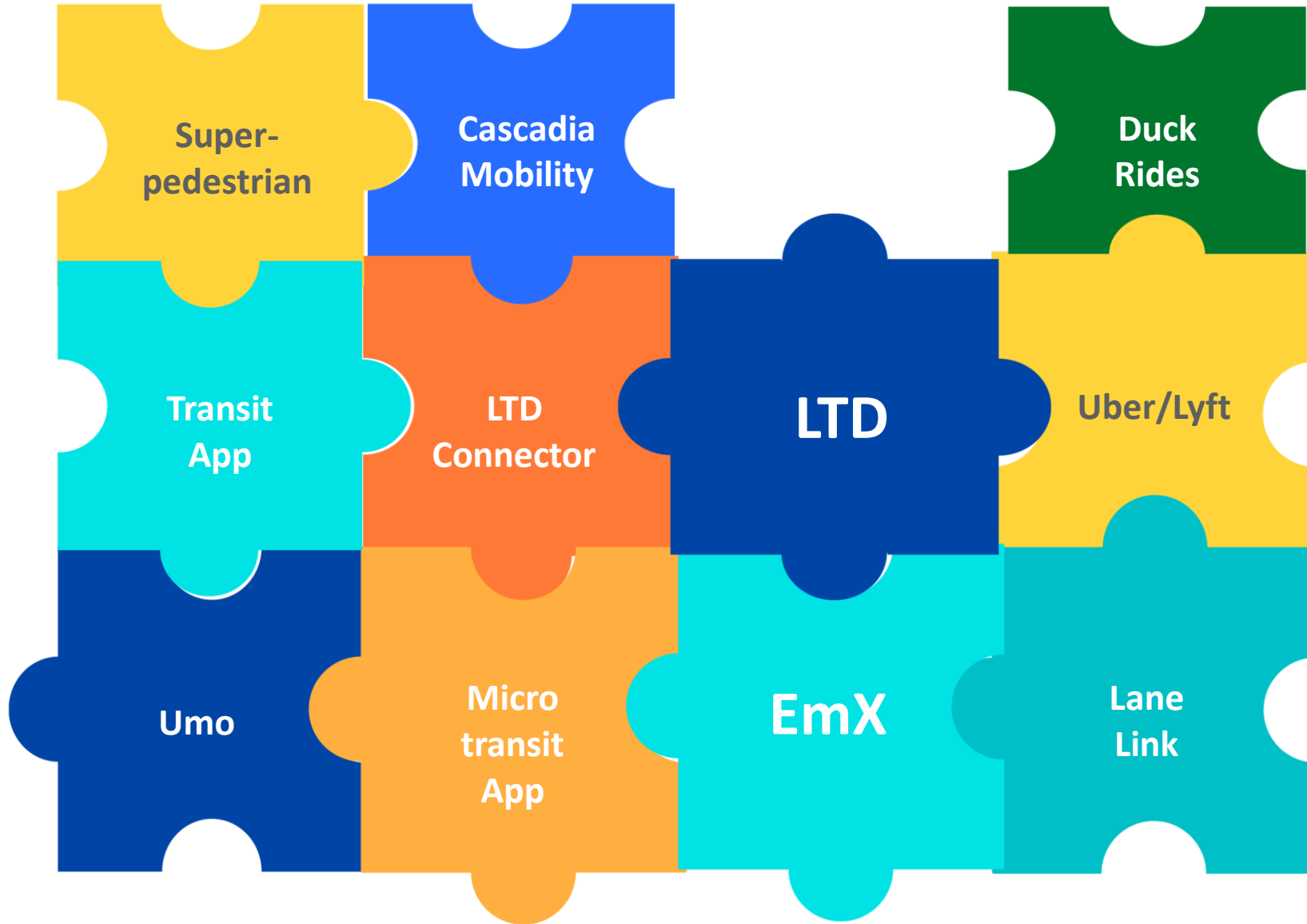


# Opportunities abound...





# Mobility management organizes and aligns.



# LUNCH



# Guest Speaker

Representative Julie Fahey  
*District 14 – West Eugene & Veneta*

Areas of Focus:

Housing Affordability

Living Wage Jobs

Worker Protections

Improving Education Outcomes



# Path Forward: Mobility Framework



# LTD's Success Outcomes



## Customer Satisfaction

We will deliver outstanding customer service that increases the willingness of our customers to recommend our services to others.



## Employee Engagement

We will attract and retain a high-quality workforce through high levels of employee engagement.



## Sustainability

Our goal is to do our part to preserve and protect the environment.



## Community Value

We will provide strong value to the community through the services we offer, whether or not they use our services directly.



## Financial Health

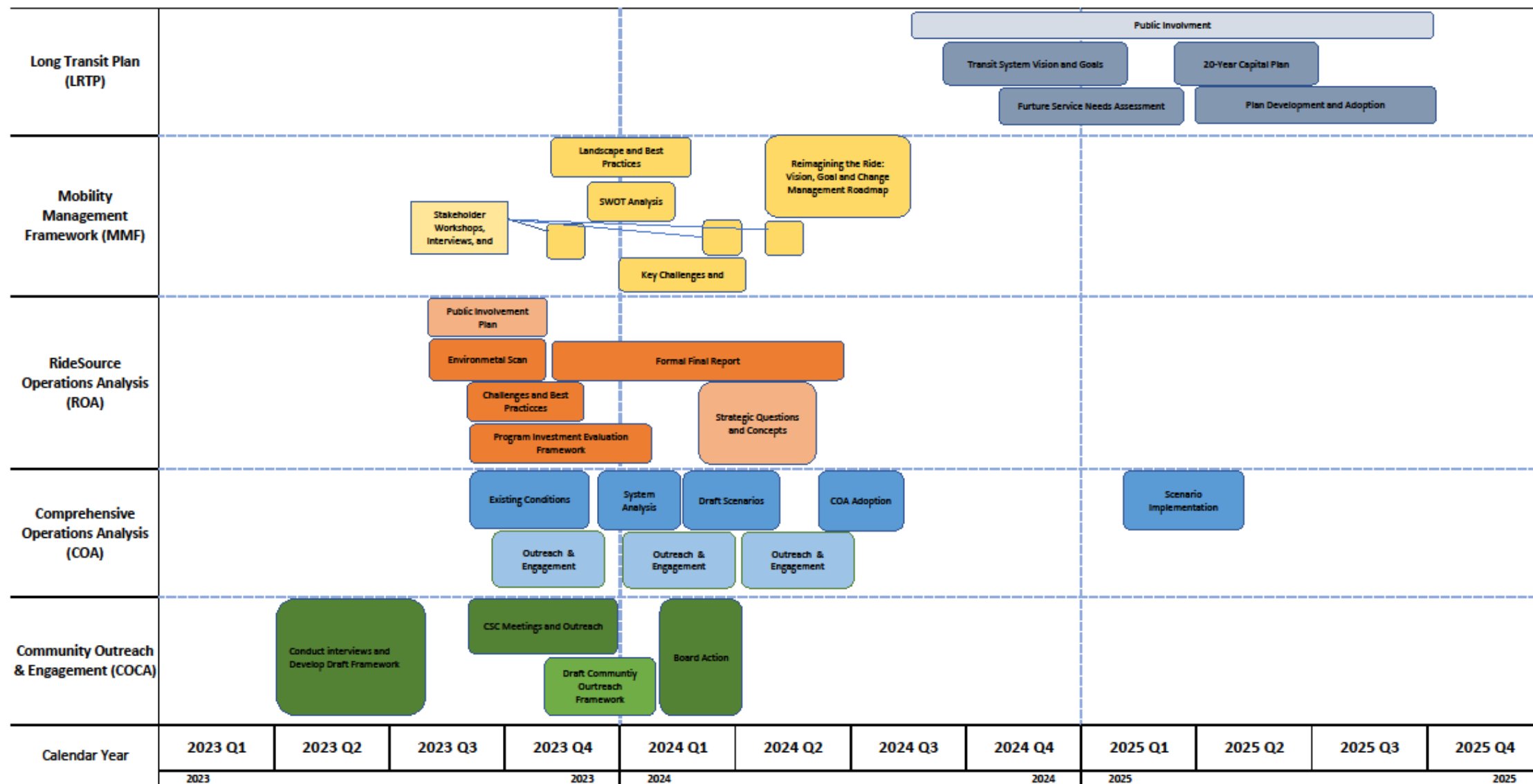
We will maintain a strong financial position to sustain our operations for the future.

# Key elements of LTD's Path Forward include:



1. Oregon Revised Statute 267;
2. Outcomes from the Reimagine the Ride process;
3. The development of a piloting program;
4. Continued development of LTD's fixed route system; and
5. Continued development of LTD's core partnerships.

**FIGURE 3**  
**REIMAGINE THE RIDE PROJECT TIMELINE SUMMARY**



# Piloting Program



- Informed by Board-adopted Mobility Management Strategy
  - LTD's Mobility Management Decision-Making Process provides a piloting guide
- Cottage Grove Pilot has been successful

*What do you think of these pilots based on the economic information and community priorities presented?*

*What would you want to see delivered based on these pilots and past discussions?*





# LTD's fixed route operations will remain a core mobility offering

The COA is the recognition that nothing is static about a community, therefore there is nothing static about a mobility network.

Ongoing development of LTD's fixed route system will be informed by the COA process.

*How do we give the community confidence that our core business will remain as we diversify our mobility portfolio?*

# Continued development of LTD's core partnerships

- Land Use-Transportation planning coordination at the local and regional level
- Broader Mobility System development through local partnerships
  - Cities, County, State, Cascadia Mobility and other non-profits
  - Development and leveraging of state resources

*How can LTD best position itself as an Integrator to connect current initiatives and fill funding gaps?*

# BREAK

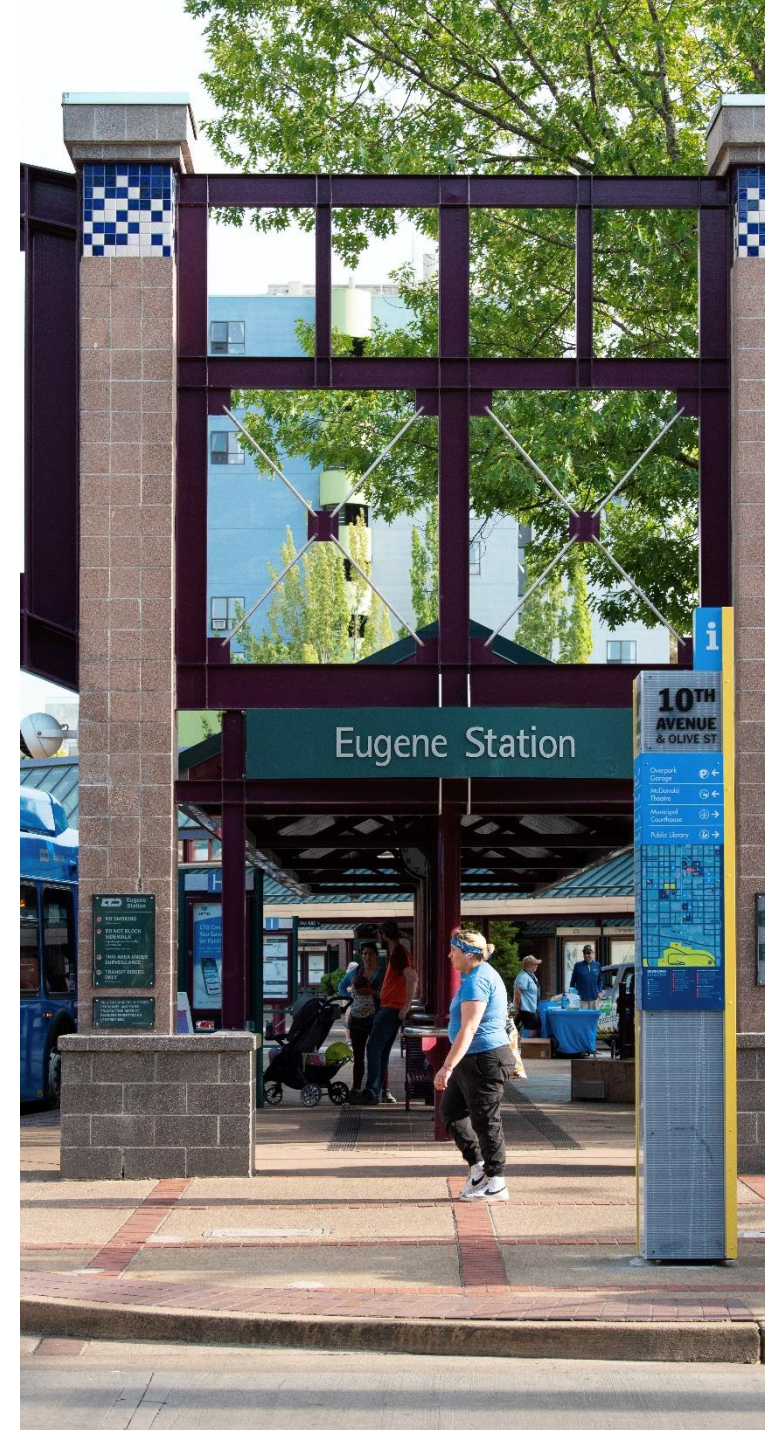


# Headline Exercise



A newspaper template and Sharpie will be shared with everyone.

*Thinking forward five years from now, write a news headline that describes the successful outcome of LTD's transition to Mobility Manager.*



# Blind spots and Threats



## **Blind Spots**

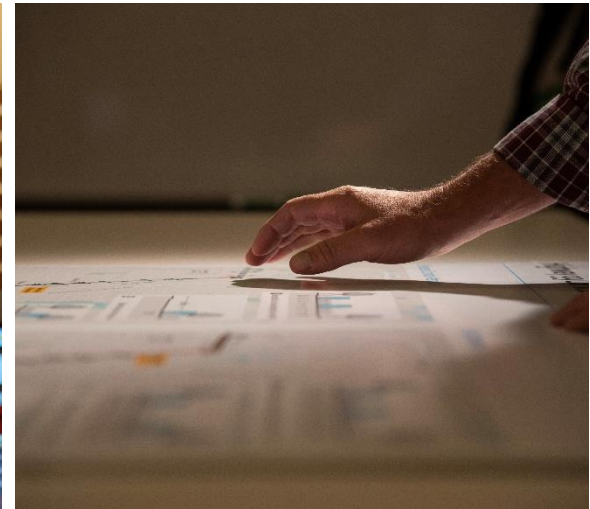
As LTD transitions to becoming a Mobility Manager, what obstacles will the team encounter that they are not discussing today?



## **Threats**

As LTD transitions to becoming a Mobility Manager, what external threats could negatively impact the success and reception of LTD's transition?

# Key Actions and Priorities



# Moving Forward



# One Word Close

