



TO: Regional Advisory Working Group

DATE: June 28, 2011

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RE: Plan Bay Area: Equity Analysis Framework for Alternative Scenarios

This memorandum summarizes the proposed framework for the equity analysis of the Plan Bay Area Alternative Scenarios. Staff will present this information at your July 5 meeting and welcomes your comments and input on the proposed framework.

Background

Last December, staff presented to the RAWG a three-step approach to carrying out the equity analysis of Plan Bay Area, and solicited participation by RAWG members in the formation of the RTP/SCS Equity Working Group, which also includes members of MTC's Policy Advisory Council Equity and Access Subcommittee, which has met monthly since February (see Attachment A for a group roster). The Plan Bay Area equity analysis is intended to determine the allocation of Plan benefits and burdens between identified target populations and the remainder of the region, spanning all three major planning phases related to the plan's development:

- **Step 1:** Assess the outcome of Initial Vision Scenario (*completed March 2011*)
- **Step 2:** Review the analysis framework used for the Initial Vision Scenario and update for use on the Alternative SCS Scenarios assessment (*currently under way*)
- **Step 3:** Complete the equity assessment of the Preferred Scenario based on the evaluation methodology developed in 2011 and consistent with federal guidelines in concert with the RTP EIR process (*beginning late 2011/early 2012*)

Step 1 was completed in March, reviewed with the Equity Working Group, and summarized in the Initial Vision Scenario Report. Since then, staff has been working closely with working group members to develop a framework for the equity analysis of Plan Bay Area's Alternative Scenarios. The proposed framework consists of five equity measures addressing a range of distinct themes that were elevated in discussions with Equity Working Group members, summarized in Attachment B.

Initial Vision Scenario Equity Analysis: Takeaways

Given the abbreviated timeframe of the Initial Vision Scenario's development, the equity analysis of the Initial Vision Scenario relied on breaking out results for the 10 adopted performance targets by income level to the extent possible, and identifying relevant proxies for the targets that could not be broken out by income. While tying the equity analysis directly to adopted policy objectives was seen as a powerful way to promote equity in discussions of regional priorities, staff identified two drawbacks in this approach: (1) the large number of equity measures was challenging to summarize in terms of the Initial Vision Scenario's *overall* equity

performance; and (2) not every target, when disaggregated, translated into an effective equity measure.

Proposed Equity Analysis Framework for Alternative Scenarios

The goal of the Alternative Scenarios equity analysis is to compare how the different scenarios perform in distributing the benefits and burdens of the alternative land use, transportation, and policy packages between the target populations of concern and non-target populations. To carry out this comparison requires identifying a set of equity performance measures that can be readily summarized for each scenario, as well as relevant target population(s) for each performance measure.

Compared to the targets-based framework of the Initial Vision Scenario, the proposed Alternative Scenarios framework follows a more succinct approach to selecting measures, based not only on the availability and quality of data for both the base and horizon years, but also on the following criteria that each measure:

- Ties directly to key regional equity priorities identified by past studies and in Equity Working Group discussions.
- Adds a distinct dimension of equity not captured in any of the other equity analysis measures.
- Is simple, straightforward, and easy to understand.
- Has potential to reflect substantive differences between Alternative Scenarios relevant to equitable development, and combine meaningfully into a way to identify which Alternative Scenario best supports equitable development.
- Is able to inform and support policy initiatives related to equity that are within the regional agencies' policy realm.

Attachment B summarizes the equity analysis framework for the Alternative Scenarios reviewed initially by the Equity Working Group last month. It consists of five performance measures that address a range of priority regional equity issues identified in past agency studies and then elevated via discussions with working group members. Each measure presented includes a detailed description of what data the measure would produce, the relevant key questions the measure would help answer, which target population(s) would be compared, and brief discussion of advantages and potential issues related to the inclusion of each measure.

Identification of Target Populations

In addition to the low-income and minority Communities of Concern that have been analyzed by MTC in past RTP Equity Analyses, staff is proposing to identify additional target populations to include in the Alternative Scenarios analysis, including “Limited English Proficiency/Limited Educational Attainment Communities” and “Low Mobility Communities.” These additional communities have been recommended insofar as they:

- incorporate consideration of national origin into the analysis
- respond to a recommendation made by MTC's Policy Advisory Council to evaluate seniors and people with disabilities in addition to low-income/minority populations
- assess results specifically for communities that may be less likely to be engaged in the planning process.

Staff proposes to characterize these communities as having concentrations of the following populations based on the most recent data available from the Census Bureau that is consistent with MTC’s current travel analysis zone geographies.

Low-Income/Minority Communities of Concern

Low Income Population (less than 200% of federal poverty level)

Minority Population (any race or ethnicity besides white/non-Hispanic)

Limited English Proficiency/Limited Educational Attainment Communities

Population That Speaks English Less Than “Very Well”

Population 25+ with Less Than High School Diploma

Low Mobility Communities

Population 5+ with a Disability

Population 75+

Zero-Vehicle Households

A summary analysis of staff’s initial proposed thresholds for defining these communities is provided in Attachment C. Based on feedback from Equity Working Group members on the proposed thresholds, staff is currently developing an alternative definition based on more consistently derived thresholds which will be reviewed at the July 13 Equity Working Group meeting.

Equity Analysis Schedule

	Equity Analysis Milestones	Plan Bay Area Milestones
Finalize equity analysis framework for Alternative Scenarios and proceed with model-based technical work	July 2011	
Finalize methodologies for “off-model” analyses	August 2011	
Alternative Scenario Results released for public review	October 2011	October 2011
Confirm methodology for equity analysis of Preferred Scenario	March/April 2012	
MTC/ABAG adopt SCS Preferred Scenario		April 2012
Technical analysis of Preferred Scenario	Summer 2012	Summer 2012
MTC/ABAG release Draft RTP/SCS	November 2012	November 2012
MTC/ABAG adopt Final RTP/SCS		April 2013