

# OneBayArea

Equity Working Group  
September 12, 2012, 9:45 a.m. – 11:00 a.m.  
MetroCenter, Claremont Conference Room  
101 8<sup>th</sup> Street, Oakland, 2nd Floor

## AGENDA

Estimated Time  
for Agenda Item  
**9:45 a.m.**

1. Welcome and Self-introductions
2. Equity Working Group Work Plan and Schedule\* (*Jennifer Yeamans, MTC*)
3. Memorandum summarizing July 11 meeting\* (*Marisa Raya, ABAG*)
4. Reports from Other Regional Advisory Groups:
  - Regional Advisory Working Group  
The September 4 Regional Advisory Working Group meeting was canceled.
  - Partnership Technical Advisory Committee  
The September 17 Partnership Technical Advisory Committee was canceled.

## DISCUSSION ITEMS

**9:50 a.m.**

5. PDA Growth Strategy\* (*Marisa Raya, ABAG with Linda Jackson, Transportation Authority of Marin*)  
*Staff and CMA representative will lead a discussion on the Priority Development Area Growth Strategy component of the One Bay Area Grant Program and ABAG's support to CMAs.*
6. Plan Bay Area Investment Analysis Methodology\* (*Jennifer Yeamans, MTC*)  
*Staff will present an overview of the methodologies to analyze the equity implications of the draft Plan Bay Area Investment Strategy.*

## INFORMATION ITEMS / OTHER BUSINESS

**10:50 a.m.**

7. Future Agenda Items (*All*)
8. Public Comment
9. Adjournment

### Next meeting:

Wednesday, October 10, 2012 11:15 a.m. – 1:00 p.m.

MetroCenter

2nd Floor Claremont Conference Room

101-8th Street, Oakland 94607

\* Agenda items attached

\*\* Attachments to be distributed at the meeting.

*The Equity Working Group assists staff in the development of the Equity Analysis for the Sustainable Communities Strategy/Regional Transportation Plan.*





# Equity Working Group Work Plan and Schedule

Revised 9/4/2012

Tasks	2011												2012												2013							
	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M			
<b>1. Vision Scenario Analysis</b>																																
1.1 Review populations and measures to be analyzed		*																														
1.2 Review results			*																													
<b>2. Alternative Scenarios Analysis</b>																																
2.1 Review populations and measures to be analyzed									*																							
2.2 Review results											*																					
<b>3. Draft Plan (Preferred Scenario) Analysis</b>																																
3.1 Review populations and measures to be analyzed															*																	
3.2 Review results																*							*									
<b>4. Complementary Tasks</b>																																
4.1 Update Snapshot Analysis/SCS Indicators																																
4.2 Identify other essential equity tasks that can be effectively analyzed																																
4.3 Review/comment on Scenarios relative to equity analysis results														*																		
4.4 Support engagement in low-income and minority communities																																
4.5 Recommend possible policies for consideration in the SCS/RTP																			*													
<b>Key Committee/Board Meetings</b>			1															2														
<b>RTP/SCS + EIR</b>			Vision		Alternative Scenarios									Plan Preparation						D										F		
<b>RHNA</b>				Methodology												D																F

\* Milestone D = Draft F = Final

Key Meetings:

- (1) Review Vision Scenario Results
- (2) MTC/ABAG Approve Preferred Scenario (Draft SCS)
- (3) Adopt RHNA methodology/Release Draft RHNA
- (4) Release Draft Plan
- (5) Final RTP/SCS

All dates/workplan elements subject to change



To: Ken Kirkey, MTC Planning Director  
 Miriam Chion, ABAG Interim Planning & Research Director

From: Regional Agency Staff

Date: August 14<sup>th</sup> 2012

Subject: Equity Working Group Feedback on Plan Bay Area Implementation Policies

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At its July 11th meeting, the Equity Working Group provided valuable feedback on developing the actions and policies necessary to implement the Sustainable Communications Strategy. This memo summarizes their comments and recommendations in order to inform staff discussion and upcoming presentations to the ABAG Regional Planning Committee, MTC Policy Advisory Committee, and other bodies, along with input from other sources.

Regional Equity Working Group input reflects the prioritization of their goals:

1. Developing more affordable housing and transportation choices to reduce housing and transportation costs
2. Promoting an equitable pattern of growth that reduces the risk of displacement
3. Improve access to jobs and community services
4. Building more healthy communities
5. Reduce non-commute time to promote more equitable mobility

Much of the feedback relates to improving monitoring and accountability in existing programs to strengthen their role in implementing the SCS.

### **New Definitions: From Displacement to Stabilization**

As we reframe “anti-displacement” policies as increasing stability, we need to create a consensus definition of the term. A recommended definition of stability includes:

- Reliable Transit service
- Inclusive economic development
- Stable affordable housing
- Safe Neighborhoods with regards to both crime and environmental health

Also related to defining terms, the agencies should broaden the concept of “Senior housing” to include non-seniors with disabilities.

### **Housing Funding and Policies**

The group supports a *Regional Affordable Housing Trust Fund* and suggests looking to Washington state as a model. The state has a comparably sized population about 7 million. A list of best practices and challenges would be a good starting point.

Recommended *funding sources* for Affordable Housing & Neighborhood Stabilization include:



- Regional Real Estate Transfer Tax for each county
- Regional Jobs-Housing Linkage Fee (or fee triggered by “hot” local development market)
- Regional Affordable Housing Fee (or fee triggered by “hot” local development market)
- Tax increment, Land Value Capture

Recommended *state and local legislation changes* include the following:

- Supporting the creation of secondary units and additional density bonus provisions.
- Support the use of Medicare funding for senior housing expenses. CA is one of a few states that do not allow Medicare to be spent on assisted living. This pushes seniors into nursing homes, which are three times the cost.

Recommended *policies* to increase affordable housing near transit that the region should promote include:

- Land Banking/Land Trusts – use of public funding to acquire parcels near transit for affordable housing construction, therefore lowering the cost of producing affordable housing
- [Affordable Housing Overlay Zoning](#) – use of zoning incentives to make affordable housing development cheaper per unit than market rate units on a particular parcel (see recent example in the newly adopted City of Alameda Housing Element)
- TOD-specific Inclusionary Policies (either per project or for each TOD-area in aggregate)
- Just Cause and Fair Rent Laws – slow rate of renter relocation as rents rise
- Condominium Conversion Restrictions – reduce rate of tenure conversion as real estate values increase
- Region-wide Inclusionary Housing Policies

The Equity Working Group also highlighted two *challenges* related to affordable housing creation and preservation:

1. The abstraction of affordability from actual units is generally a problem for getting political support for new policies. For example, a “No Net Loss” of affordable units goal for a planning area may not allay displacement fears because it does not ensure that the current residents will get to stay in the neighborhood. Similarly, using inclusionary zoning buy-out clauses to allow payment into a Regional Trust is generally less supported by low-income residents because they do not see the direct creation of units.
2. Related to preservation, there are a lot of problems with ongoing efforts to monitor unit affordability. This has already come up in the discussions of the H+T cost projection.

### **Updating PDA zoning to align with RHNA**

Equity Working group members recognize that the PDA zoning update requirement should be rolled out over time: if a community just updated their GP/zoning, they are less inclined to do so in the near term due to time and cost factors.

Recommended *policies* include:

- Continue to have Jobs-Housing fit in all communities as a goal and clarify what this means. Although RHNA is tied to jobs and low-wage workers, it is confusing for stakeholders, who do not understand if there is a desired ratio of jobs/housing or whether this varies across the region.
- Target affordable housing production tools to meet local wage distributions. This could be included in ABAG’s Housing Analysis.
- Use market thresholds to address affordable housing needs and policies, related to the concept of jobs-housing fit. For example, the region could consider adopting a threshold

percent for affordable housing in PDAs in order to address concentrations of poverty. Some areas do not need additional affordable housing; they are already overburdened with affordable housing and/or "naturally" affordable housing due to their location and the foreclosure crisis. These areas should instead be a focus for job creation.

### **Transportation: Bicycle/Pedestrian Infrastructure, Mobility Management and Lifeline Accountability**

Lower-income bus fares or free fares for youth is a valuable strategy, but Equity Working Group members also recognize the need to invest in all modes, especially *bicycle and pedestrian improvements*. Bike/Ped improvements are a one-time capital cost with relatively low maintenance costs; as such, this is a significant infrastructure equity issue.

Recommended *Short-term policies* include:

- Dedicate more resources for Bike/Ped path planning. A potential strategy would be to include bike/ped investments as a requirement for new development
- Encourage jurisdictions to update their zoning to accommodate bike parking
- Dedicate funding should to Mobility Management that includes schools, institutions, and major employers, as well as inter-county transit coordination (Napa and Sonoma came up as an example.)
- Integrate paratransit services with Mobility management programs, and teach paratransit users to ride the bus when appropriate and feasible.

Recommended *Mid-to-Longterm policies* include:

- More funding and accountability for the Lifeline program, which is impacted by both a lack of overall funding and MAP 21 changes. Some geographies are not actively applying for funds for their communities of concern.

### **Air Quality**

The region should shift to adopt a perspective of cumulative impacts. The current permitting system is problematic because permits are issued for a single use, rather than considering surrounding polluting uses. Community Risk Reduction Plans move in this direction: at this point they have primarily yielded modeling improvements that take the specific area circumstances into account.

Recommended *Policies* include:

- More transparency is still needed around air quality modeling and how it reflects reality. For example, the model will state that housing in an impacted location is fine as long as it is on the 2<sup>nd</sup> level or above, but participants do not understand why this is the case
- Health Impact Assessments and mitigations should be prioritized for main arteries, such as East 14<sup>th</sup>/International Boulevard. This is a potential use of the additional funding set aside for PDA Planning.

### **Parks**

Recommended *Policies* include:

- Ensure that park funding raised through Quimby Act and related development fees does not get spent in an efficient manner.
- Make school districts partners in recreational open space development.

## **EIR Alternatives**

Equity Working Group members highlighted two *challenges* with the EIR:

- The VMT Tax concept is regressive because it does not differentiate work commute trips from necessary trips like taking an elderly parent to the doctors
- There is no measured impact on public services

The primary recommendation is to adjust the EIR review timeline for a 2 week furlough in December so that public agencies have sufficient time to respond.

Overall, Equity Working Group members recognize the importance of regionalism in incentivizing local policy changes. This includes maintaining some direct regional-to-local funding, rather than shifting to a CMA intermediary. Funding criteria should reward local production of affordable housing and have eligibility requirements that include adopted affordable housing or anti-displacement policies, varied by jurisdiction. The discussion above of housing market-based thresholds is one way to move forward on this.



To: Equity Working Group  
From: Marisa Raya, ABAG  
Date: September 5, 2012  
Subject: PDA Strategies and One Bay Area Grant

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MTC Resolution 4035, establishing the One Bay Area Grant program, asks county Congestion Management Agencies (CMAs) to both engage disadvantaged communities and to create Priority Development Area (PDA) Strategies to support the proposed investment of OBAG funds. The Resolution can be found at [http://apps.mtc.ca.gov/meeting\\_packet\\_documents/agenda\\_1877/4b.pdf](http://apps.mtc.ca.gov/meeting_packet_documents/agenda_1877/4b.pdf).

The attached memo (PDA Investment & Growth Strategies – ABAG Role, 6/20/12) describes both short-term and long-term support that ABAG has proposed to support CMA staff. This memo also outlines ABAG’s broader work agenda around implementing the SCS through supporting sustainable development in PDAs.

Staff and a CMA representative will review this approach with you at your September 12 meeting to receive your feedback. Key questions include:

1. What type of CMA outreach strategies do you think will be most effective, particularly at engaging Communities of Concern?
2. What are the equity issues inherent in ABAG’s proposal for short- and long- term research and policy support that should be further detailed?



Date: June 20, 2012  
To: Congestion Management Agencies  
From: Ezra Rapport  
Subject: PDA Investment & Growth Strategies – ABAG Role

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Priority Development Areas (PDAs) are the centerpiece of the Sustainable Communities Strategy, focusing the region's future growth into neighborhoods that local governments have self nominated for development. This memo highlights ABAG support for CMAs and jurisdictions to develop PDA Investment and Growth Strategies as required by OBAG. It reviews PDA accomplishments to date, ABAG support that includes help with housing element review, a summary of the OBAG funding process, and potential PDA infrastructure investments to consider.

## PDA Accomplishments

To date, the following has been accomplished:

1. About 200 PDAs in locations throughout the Bay Area have been nominated, vetted, and approved as legitimate locations for sustainable growth. These places are either well connected to regional transit or can serve as town centers with walkable or bikeable connections.
2. Each one of the PDAs has been given a place type designation by the local jurisdiction, based upon a "Vision" statement and level of growth. In some cases, the level of growth is not expected to be fully realized for 30 years;
3. PDA Assessments were performed to inform the regional agencies of some of the needs of each of the PDAs;
4. Grants and technical support have facilitated plans for about 70 PDAs, ensuring a coordination of zoning, permitting, and fees associated with development within a PDA.

## ABAG Planning Support

ABAG can reduce pressure on jurisdictions, aid CMAs, and eliminate redundancies with Housing Element work. ABAG can also assist local jurisdictions in implementing other local policy changes to help them achieve their PDA housing and employment goals. ABAG's contribution can occur as follows:

*Short term, by May 1, 2013:* ABAG can provide an analysis of progress towards meeting the Housing Element objectives and an identification of current local housing policies to encourage affordable housing production and community stabilization by August 2012.

ABAG can also provide Countywide reports that include PDA profiles, including current planning status, projected housing and jobs, and Housing Element certification status for each jurisdiction.

ABAG can also complete a permitting report for all jurisdictions on the 2007-2014 RHNA Cycle, including units permitted, affordability levels and location in PDAs. ABAG can also assess housing policies at a high level, including whether or not jurisdictions have the following: inclusionary zoning, linkage fees, condo conversion ordinances, just cause evictions and rent controls. In-house data is available for about half of jurisdictions through the PDA Assessments.

*Long-term, ongoing through 2014 - 2016:* starting in May 2014 and for subsequent updates, PDA Investment & Growth Strategies will need to assess performance in producing sufficient housing for all income levels through the RHNA process and, where appropriate, assist local jurisdictions in implementing local policy changes to facilitate achieving these goals.<sup>1</sup> This analysis will be coordinated with related work conducted through the Housing and Urban Development (HUD) grant awarded to the region in fall 2011. ABAG can offer the following assistance with this work:

1. Analysis of zoning conformance with the place type and RHNA allocation. Each PDA needs to have their zoning checked against the densities described in their Place type to enhance housing production. While the jurisdictional RHNA was set in accordance with their PDA Place type, the zoning of the PDA needs to be analyzed to determine if any changes are required;
2. Design guidelines for the PDA to explain neighborhood planning to existing residents and ease the permitting process. Each PDA should be encouraged to undertake a neighborhood design guideline process to supplement the zoning of the PDA;
3. Complete Community Planning to evaluate existing PDA conditions and determine what is needed to improve the area for new and existing residents. This includes physical as well as social conditions, including, for example school pathways that serve a diversity of academic performance;
4. Entitlement streamlining analyses to evaluate the readiness of an area to approve private investment including analysis of fees and approvals across all agencies for a variety of project types, including housing, commercial buildings, and mixed use projects;

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<sup>1</sup> Such as inclusionary housing requirements, city-sponsored land-banking for affordable housing production, “just cause eviction” policies, policies or investments that preserve existing deed-restricted or “naturally” affordable housing, condo conversion ordinances that support stability and preserve affordable housing, etc.

5. PDA Infrastructure Assessment evaluates the infrastructure needs of the PDA for growth, transit service, and hazard mitigation over the short, medium, and long term. Available sites for development are inventoried;
6. Affordable Housing programs that are in place in the jurisdiction. Estimates of affordable housing subsidies or programs that can be utilized within the PDA are evaluated;
7. Project economic feasibility is assessed based upon general revenue and cost estimates associated with projects in the areas. Comparables are utilized. ABAG/MTC UrbanSim modeling may be useful in the future to perform this task;
8. Phasing the Growth Strategy will also be reviewed, to understand where along the development path the PDA stands with respect actions taken that will fulfill the Place type of the PDA. This will help assess the type of investment that should be chosen for the PDA from OBAG.

#### OBAG Funding Process Summary

The OBAG formula is intended to provide housing incentives for PDAs to complement transportation investments that support focused development. OBAG is funded primarily from three federal fund sources: STP, CMAQ and TE. The proposed One Bay Area Grant formula uses actual housing production data from 1999-2006. Subsequent funding cycles will be based on housing production from ABAG's next housing report to be published in 2013. This formula also recognizes jurisdictions' RHNA and past housing production contributions to very low and low income housing units.

MTC working with ABAG, will revisit the funding distribution formula for the next cycle (post FY2015-16) to further evaluate how to best stimulate housing production across all income levels and other Plan Bay Area performance objectives. Both agencies will also continue to evaluate places, in terms of their access to services and jobs.

OBAG funding requires that PDA minimum expenditures be made in the following percentages: CMAs in larger counties (Alameda, Contra Costa, San Mateo, San Francisco, and Santa Clara) must direct at least 70% of their OBAG investments to the PDAs. For North Bay counties (Marin, Napa, Solano, and Sonoma) this minimum target is 50% to reflect the more rural nature of these counties.

A project lying outside the limits of a PDA may count towards the PDA minimum provided that it directly connects to or provides proximate access to a PDA. Depending on the county, CMA planning costs would partially count towards PDA targets (70% or 50%) in line with its PDA funding target. CMAs are required to designate these PDA-adjacent projects and provide policy justifications. This analysis would be subject to public review when the CMA board acts on OBAG programming decisions.

#### *PDA Investment and Growth Strategy*

Funding for PDAs will be administered by CMAs. CMAs need to prepare a PDA Investment & Growth Strategy by May 1, 2013, demonstrating how CMAs are to guide

transportation investments that are supportive of PDAs. An adopted Investment and Growth Strategy will meet this requirement if it follows the project priority-setting process below.

A transportation project priority-setting process for OBAG funding is intended to support and encourage PDA development, recognizing that the diversity of PDAs will require different strategies. Regional agencies will provide support, as needed. A project priority-setting process should *establish local funding priorities* to develop funding guidelines for evaluating OBAG projects that support multi-modal transportation based on connections to housing, jobs and commercial activity. Emphasis should be placed on the following factors when developing project evaluation criteria to identify high impact areas:

- Housing – PDAs taking on significant housing growth in the SCS (total number of units and percentage change), including RHNA allocations, as well as housing production;
- Jobs in proximity to housing and transit (both current levels and those included in the SCS);
- Improved transportation choices for all income levels (reduces VMT), proximity to quality transit access, with an emphasis on connectivity (including safety, lighting, etc.);
- Consistency with regional TLC design guidelines or design that encourages multi-modal access;
- Project areas with parking management and pricing policies;
- Projects located in Communities of Concern (COC) – favorably consider projects located in a COC;
- PDAs with affordable housing preservation and creation strategies – favorably consider projects in jurisdictions with affordable housing preservation and creation strategies or policies.

CMAAs will also be required to present their PDA Growth Strategy to the Joint MTC Planning / ABAG Administrative Committee for funds to be allocated.

#### Potential PDA Infrastructure Investments to Create Complete Communities

PDA transportation projects are intended to bring new vibrancy to downtown areas, commercial cores, high-density neighborhoods, and transit corridors, making them places where people want to live, work and visit. PDA projects support the RTP/SCS by investing in improvements and facilities that promote alternative transportation modes rather than the single-occupant automobile.

General project categories include:

- Station Improvements such as plazas, station access pocket parks, bicycle parking
- Complete streets improvements that encourage bicycle and pedestrian access
- Transportation Demand Management projects including carsharing, vanpooling traveler coordination and information or Clipper®-related projects
- Connectivity projects connecting high density housing/jobs/mixed use to transit, such as bicycle/pedestrian paths and bridges and safe routes to transit
- Density Incentives projects and non-transportation infrastructure improvements that include density bonuses, sewer upgrades, land banking or site assembly (these projects require funding exchanges to address federal funding eligibility limitations)
- Streetscape projects focusing on high-impact, multi-modal improvements or associated with high density housing/mixed use and transit (pedestrian improvements including bulb outs and sidewalk widening, landscaping improvements including medians and street trees, bicycle improvements including new lanes and storage racks)
- Bicycle/Pedestrian Use: Constructing bicycle and pedestrian facilities (paths, bike racks, support facilities, etc.) that are not exclusively recreational and reduce vehicle trips.



To: Equity Working Group  
From: Jennifer Yeamans, MTC  
Date: September 5, 2012  
Subject: Plan Bay Area Investment Analysis Methodology

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As part of the overall Plan Bay Area Equity Analysis, MTC staff intends to analyze the draft investment strategy approved by MTC/ABAG in May to determine the relative distribution of financial benefits to low-income and minority populations and to communities of concern. MTC has conducted similar analyses in the past for the *Transportation 2035* Plan as well as the 2011 Transportation Improvement Program (TIP) and the Draft 2013 TIP, making continual improvements and refinements to the methodology along the way in consultation with advisors and interested stakeholders.

For Plan Bay Area, staff is proposing to follow closely the methodology recently used for the Draft 2013 TIP Investment Analysis, which focuses on two distinct but complementary analyses:

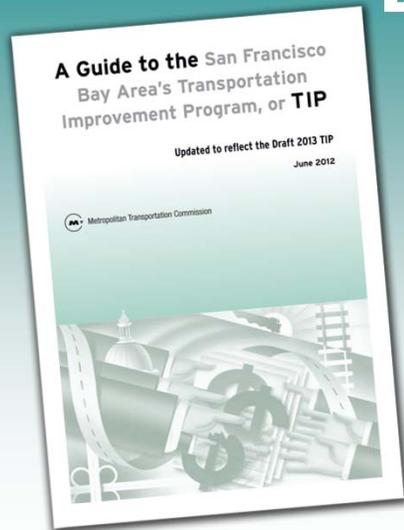
- **Population/Use-Based Analysis:** Distribution of investments to low-income/minority populations based on share of overall transportation system usage.
- **Geographic/Access-Based Analysis:** Distribution of investments to communities of concern and non-CoCs based on geographic locations of projects and programmatic investments.

The attached slides include an overview of the methodology used for the recently completed Draft 2013 TIP Investment Analysis, which was presented to the MTC Policy Advisory Council in July and which illustrate the methodologies used to distribute benefits within the overall investment strategy.

Staff will go over this information with you at your September 12 meeting to receive your feedback on these approaches and answer any questions you may have.



# Draft 2013 TIP Investment Analysis



**Presentation to  
Policy Advisory Council**

July 2012

METROPOLITAN TRANSPORTATION COMMISSION

## Purpose of the 2013 TIP Investment Analysis

- Assists in the public assessment of the 2013 TIP
- Illustrates the equity implications of the proposed TIP investments. Evaluate key question — “Are low-income and minority populations sharing equitably in the TIP’s financial investments?”
- Follows in steps of the 2011 TIP investment Analysis
- Responsive to Title VI and Environmental Justice MPO Planning Requirements.

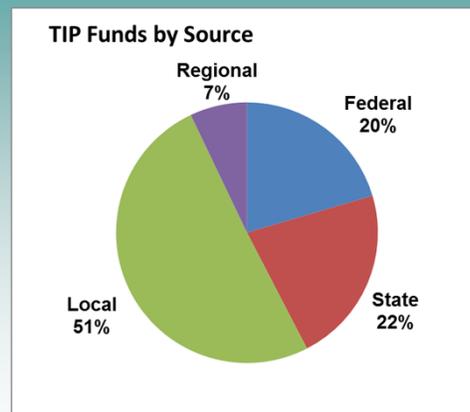
METROPOLITAN TRANSPORTATION COMMISSION

## Context of the Analysis

- **One of several different assessments that MTC conducts**
  - Plan Bay Area Equity Analysis (On-going)
  - 2011 TIP Investment Analysis (September 2010)
  - Snapshot Analysis for MTC Communities of Concern (June 2010)
  - Transportation 2035 Equity Analysis (February 2009)

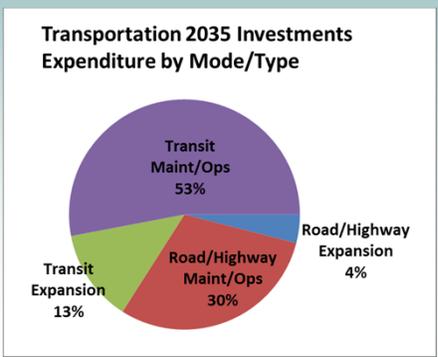
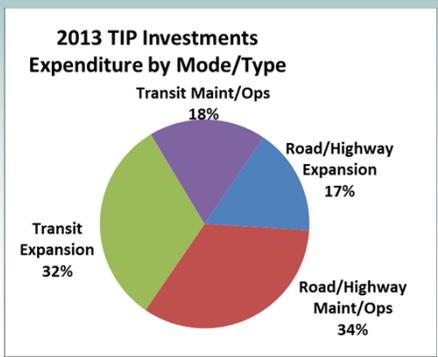
## About the 2013 TIP (Draft Only)

- Includes nearly 900 surface transportation projects
- Total investment level of approximately \$11.2 billion
- Covers four-year period through Fiscal Year 2016
- Local funds are largest share, even though TIP is focused on projects with a federal interest



# Key Differences: 2013 TIP and Transportation 2035

- Period covered – 4 years versus 25 years
- Mode and type of projects – the share of expansion and road/highway projects is greater in the 2013 TIP than Transportation 2035



# Reason for Differences 2013 TIP and Transportation 2035

- 2011 TIP is roughly 50% of the investment captured in Transportation 2035, for same 4-year period
- 2013 TIP generally includes only projects that are regionally significant, have federal funds, or require a federal action
- Transportation 2035 is all planned transportation projects
- Transit and roadway O&M is under-represented in the 2013 TIP because these investments are predominantly 100% locally-funded

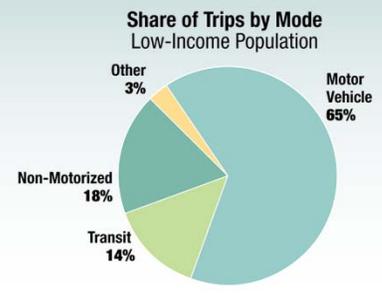
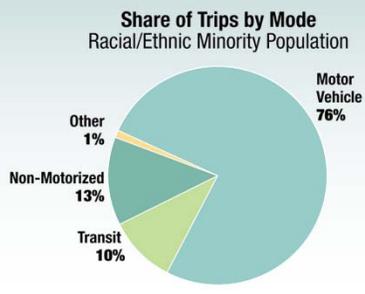
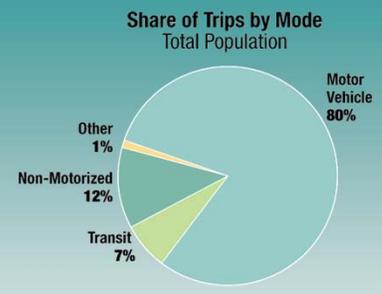
# Context – Bay Area Demographics

Population Distribution by Household Income	
	% of Total
Low-Income (≤ \$50,000)	25%
Not Low-Income (> \$50,000)	75%
Population by Race/Ethnicity	
	% of Total
Racial/Ethnic Minorities	54%
White Non-Hispanic	46%
<b>Total</b>	<b>100%</b>

Sources: 2005-09 American Community Survey (ACS) tract-level data, ACS: Public Use Microdata Sample 2008 and 2005-2007 ACS.

# Context – Bay Area Demographics

- Majority of trips are made by motor vehicle (80%)
- Travel pattern holds for low-income and minority populations, but transit and non-motorized shares increase



Data Source: Bay Area Travel Survey (2000)

## Methodology Overview

- **Two Analytical Methodologies that only account for the costs in the four-year TIP period**

- Population Use-Based Analysis – Same as 2011 TIP Investment Analysis
- Access - Based Analysis – Updated Communities of Concern Definition
- Mapping all the mappable projects to show relative geography of projects
  - For Communities of Concern
  - For ethnic minorities (tracts with greater than regional average).
    - Detail by ethnicity available at <http://www.mtc.ca.gov/funding/tip/2013/maps>

## Methodology Overview

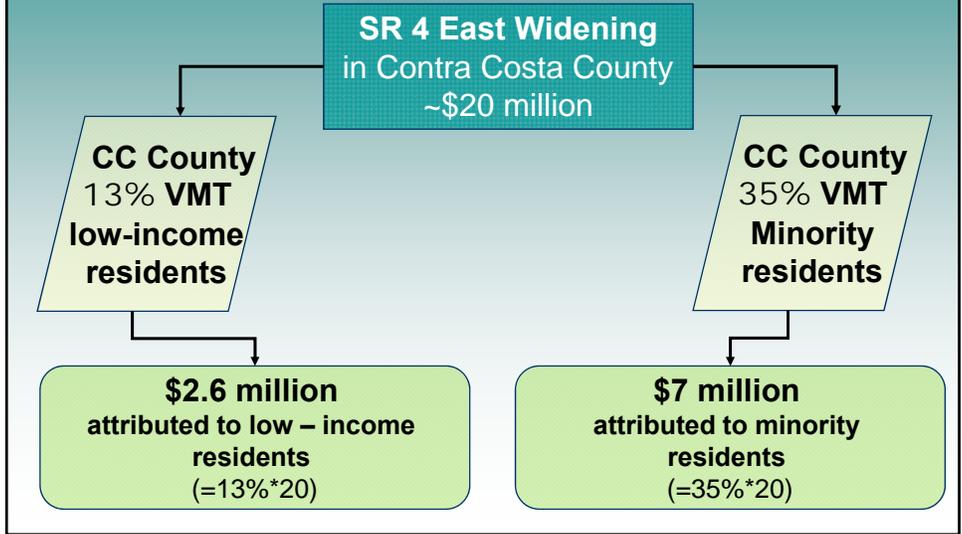
- **Population or Use-Based Analysis:**

- Use-based
- 2013 TIP investments will be separated into two modes:
  - transit and road/highway
- Compares % of investment for low-income and minority populations to % of use of the transportation system by the same populations.
- Data used — Bay Area Travel Survey (2000), Transit Passenger Demographic Survey (2006), and 2013 TIP Investments
- No change in methodology from 2011 TIP Investment Analysis

Example Project Assignment

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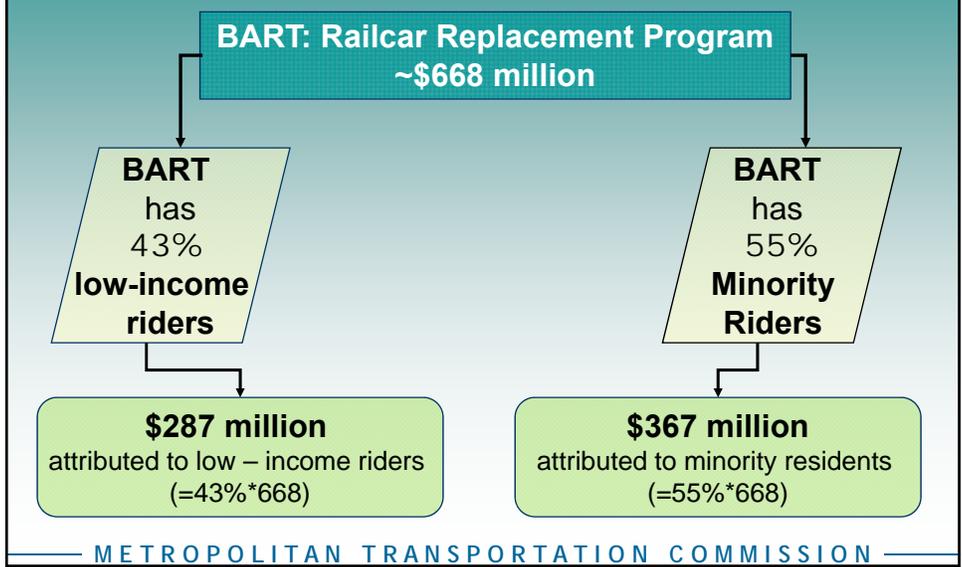
# Population Use-Based: State Highway



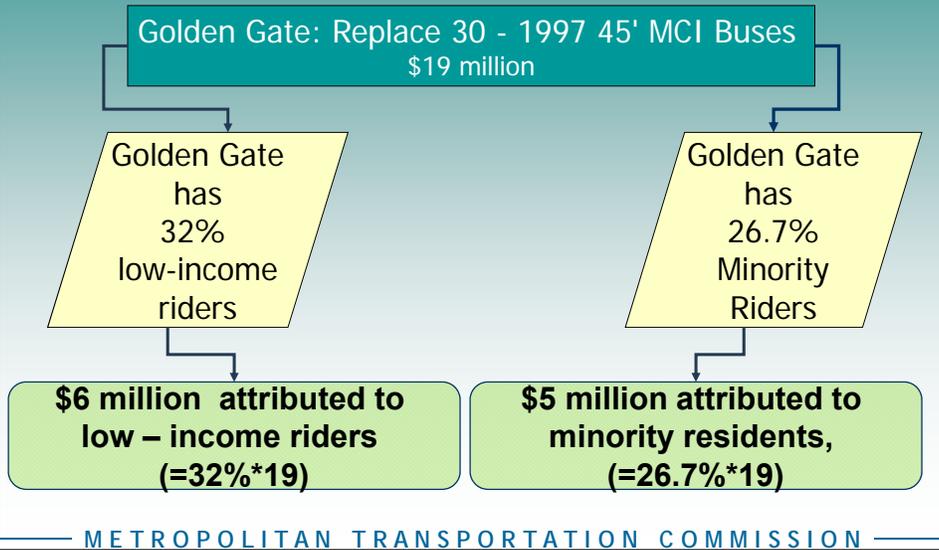
Example Project Assignment

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# Population Use-Based: Transit



# Population Use – Based Transit



# Methodology Overview

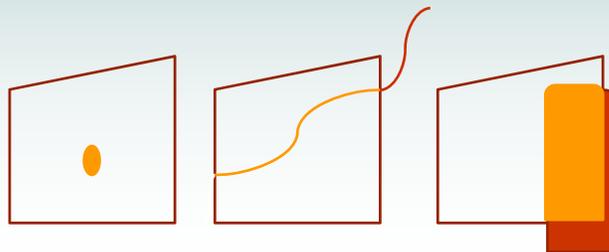
- **Access-Based Analysis:**
  - Location and access-based; it does not take into account system use.
  - Compares the % of investment in Communities of Concern (CoCs) to % population or infrastructure located in these communities.
  - Data used — 2013 TIP Investments and Accumulation of the American Community Survey (ACS) data for 2005-2009
  - CoC Definition was updated since the 2011 TIP Investment Analysis, consistent with Plan Bay Area

## Access-Based Analysis

- **2013 TIP investments classified into two groups:**
  - 1) Local mapped projects; and
  - 2) Network/system projects.

## Access-Based Analysis (Cont.)

- 1) **Local mapped projects: compared against the physical locations of the CoCs. Funding for projects that are located in a CoC boundary or partially in a CoC have their funding amounts assigned to CoCs in the same ratio as the length or area of overlap; those that do not intersect a community of concern are assigned to outside of Communities of Concern.**



## Access -Based Analysis (Cont.)

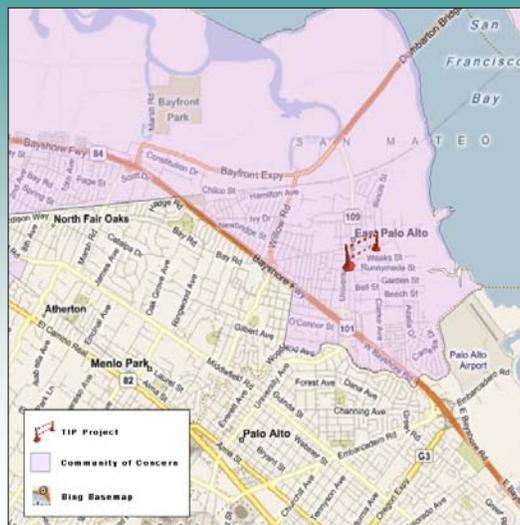
### 2) Projects that are network or system-based:

subdivided by mode (state highways, local roads, and transit) and have a share of funding assigned either in or outside of CoCs using percentages derived from MTC's geographic information system (GIS) as follows:

- **State highway projects:** % of each county's total state highway lane-miles in or outside of CoCs.
- **Local streets and roads projects:** % of each county's total local streets and roads lane-miles in or outside of CoCs.
- **Transit projects:** For rail and ferry: % of each operator's total number of stations and terminals in or outside of CoCs. For bus and multi-modal systems, % of each operator's total route-miles in or outside of CoCs.

## Example Project Assignment

### Access - Based: Local Project



Bay Road  
Improvement Project  
in San Mateo County  
~\$11 million

Mapped and in a  
Community of  
Concern

\$11 million  
attributed to  
residents in CoCs  
(=100%\*11)

## Example Project Assignment Access – Based: Transit

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**BART: Railcar Replacement Program**  
~\$668 million

**BART's Share**  
of Number of Stations in a  
**Community of Concern**  
is **37%**

**\$247 million**  
attributed to residents in CoCs  
(=37%\*105)

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## Key Findings: Overall

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- Key question posed — “Are low-income and minority populations sharing equitably in the TIP’s financial investments?”
- Several results suggest the 2013 TIP invests greater share of funding to the benefit of low-income and minority communities than their proportionate share of the region’s population or travel as a whole

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## Key Findings: Total Investments

- Both methodologies show a higher proportional investment in the 2011 TIP than either the proportionate share of trips taken by minority and low-income populations, or communities of concern populations

	2011 TIP Investment Share	Share of Total Trips/Population
<b>Population Use-Based</b>		
<i>Low-Income</i>	24%	16% (total trips)
<i>Minority</i>	49%	42% (total trips)
<b>Access-Based CoC</b>	22%	20% (population — community of concern)

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## Draft Key Findings: Population Use-Based

- Both methodologies — for total investments — show a higher proportional investment in the 2013 TIP than either the proportionate share of trips taken by minority and low-income populations, or communities of concern populations in several cases

Population Use-Based	2013 TIP Investment Share	Share of Total Trips
<b>Comparison of % Total Investments to % Trips</b>		
<i>Low-Income</i>	24%	16% (total trips)
<i>White – Non Hispanic</i>	51%	58% (total trips)
<i>Racial/Ethnic Minorities</i>	49%	42% (total trips)
<i>Black/African-American</i>	10%	6% (total trips)
<i>Asian or Pacific Islander</i>	18%	16% (total trips)
<i>Hispanic/Latino</i>	15%	14% (total trips)
<i>Other/Multiple Races</i>	6%	6% (total trips)

Data Source: Bay Area Travel Survey (2000); 2013 TIP

## Draft Key Findings: Population Use-Based

Population Use-Based	2013 TIP Road, Highway, and Bridge Investment Share	% Vehicle Miles Traveled
<b>Comparison of % Investments to % VMT</b>		
<i>Low-Income</i>	13%	13%
<b>White – Non Hispanic</b>	<b>60%</b>	<b>60%</b>
<b>Racial/Ethnic Minorities</b>	<b>40%</b>	<b>40%</b>
<i>Black/African-American</i>	<b>5%</b>	<b>5%</b>
<i>Asian or Pacific Islander</i>	<b>17%</b>	<b>16%</b>
<i>Hispanic/Latino</i>	<b>13%</b>	<b>14%</b>
<i>Other/Multiple Races</i>	<b>5%</b>	<b>5%</b>

Data Source: Bay Area Travel Survey (2000); 2013 TIP

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## Draft Key Findings: Population Use-Based

Population Use-Based	2013 TIP Transit Investment Share	Share of Transit Trips
<b>Comparison of % Investments to % Transit Trips</b>		
<i>Low-Income</i>	59%	56%
<b>White – Non Hispanic</b>	<b>39%</b>	<b>40%</b>
<b>Racial/Ethnic Minorities</b>	<b>61%</b>	<b>60%</b>
<i>Black/African-American</i>	13%	18%
<i>Asian</i>	18%	14%
<i>Hispanic/Latino</i>	26%	23%
<i>Other/Multiple Races</i>	4%	5%

Data Source: Transit Passenger Demographic Study (2006); 2013 TIP

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## Draft Key Findings: Access-Based CoC

### Comparison of % Investments in CoC to % Population Share in CoC

Geographic Access-Based: Communities of Concern	2013 TIP Investment Share	Population Share
In CoC	22%	20%

### Comparison of % Streets & Roads Investments in CoC to % Lane Miles in CoC

Geographic Access-Based: Communities of Concern	2013 TIP Investment Share	Share of Lane Miles
In CoC	23%	8%

### Comparison of % Transit Investments in CoC to % Route Miles / No. of Stations in CoC

Geographic Access-Based: Communities of Concern	2013 TIP Investment Share	Share of Route Miles / No. of Stations
In CoC	20%	18%

Data Source: American Community Survey (2005-2009); GIS Data; and 2013 TIP

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