Identifying Low Income Households for Transit
Statewide Transportation Improvement Fund

Presented by:
Marsha Hoskins, ODOT Rail and Public Transit
Jamey Dempster, Nelson\Nygaard

October 2018
OVERVIEW

What are we asked to measure?
STIF REQUIREMENTS

Oregon Administrative Rules

Definitions

• 732-040-0005(15) “Low Income Household” means a household the total income of which does not exceed 200% of the poverty guidelines updated periodically in the Federal Register by the U.S. Department of Health and Human Services under the authority of 42 U.S.C. 9902(2) for the 48 contiguous States and the District of Columbia.
STIF REQUIREMENTS

Oregon Administrative Rules

STIF Plan Contents

- 732-042-0015(1)(e) The STIF Plan must contain an explanation of how the plan defines and identifies communities with a high percentage of Low-Income Households.

- 732-042-0015(3)(c) Anticipated benefits and discrete measurable outcomes associated with each Project with specific reference to communities with a high percentage of Low-Income Households.
STIF REQUIREMENTS

Oregon Administrative Rules

STIF Discretionary and Intercommunity Funds

• 732-044-0030(1) The Commission’s investment priorities are: (a) Improvement of Public Transportation Service to Low-Income Households…
STIF REQUIREMENTS

How Low-Income Household data is used

Advisory Committee Bylaws

• Definition of high percentage of Low-Income Households to inform project selection

Local Plan

• Current and future conditions analysis that includes locations of Low-Income Households to inform service planning
STIF REQUIREMENTS

How Low-Income Household data is used

Formula Fund Allocations & Advisory Committee Project Selection Criteria

• Increase in frequency of bus service to communities with a high percentage of Low-Income Households

• Expand bus routes and services to service communities with a high percentage of Low-Income Households

• Reduce fares in communities with a high percentage of Low-Income Households
Measureable Outcomes

- Number of low income households served
- Annual report on actions taken to mitigate the tax impacts of passengers in low-income communities
What do I use to identify low income communities?
DATA RESOURCES

Poverty and high percentage thresholds

• Low-Income Households = 200% of federal guidelines level or below

• High percentage = Threshold determined by Qualified Entity

Example

• District- or County-wide average: use to evaluate block groups or other sub-area

• Statewide average: use to evaluate county service area
DATA RESOURCES

Poverty guidelines

- A.K.A. federal poverty level
- U.S. Department of Health and Human Services
- Annual updates
- By household size
EXAMPLE

Poverty and high percentage thresholds

Example

• Make-Believe Transit District: Low-Income Households = 30%
• High percentage Low-Income Households threshold = 30%
• Planning uses:
  o District identifies (maps) block groups or communities below threshold
  o Target services to these areas
• STIF reporting:
  o Number of Low-Income Households served
## DATA RESOURCES

### Online tools

<table>
<thead>
<tr>
<th>Resource</th>
<th>Functions</th>
<th>I want to…</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Census / American Factfinder</td>
<td>* See/get data tables</td>
<td>• see a table of the number of low income households for cities, counties, and the state.</td>
</tr>
<tr>
<td></td>
<td>* Get raw data</td>
<td>• download demographic data to use in GIS.</td>
</tr>
<tr>
<td></td>
<td>* Specify small-scale geography</td>
<td></td>
</tr>
<tr>
<td>Remix – Planning</td>
<td>* Draw routes and stops</td>
<td>• analyze population near a new route (stops).</td>
</tr>
<tr>
<td></td>
<td>* See demographic data maps</td>
<td>• look at maps of demographic data.</td>
</tr>
<tr>
<td></td>
<td>* Get route specific data (+ Title VI Engine)</td>
<td></td>
</tr>
</tbody>
</table>
DATA RESOURCES

US Census American FactFinder: [https://factfinder.census.gov/](https://factfinder.census.gov/)

- American Community Survey
- 5-year estimates
- Most recent today: 2016
DATA RESOURCES

Remix Public Transportation: [https://platform.remix.com/](https://platform.remix.com/)

- Open to most Oregon agencies
- Census American Community Survey data
- Low income metrics
DATA RESOURCES

Local Plans

• Transportation, transit, housing, economic development

• Check low-income definitions

• Future plans consistency

Figure 2-2  Demographic Information on Clatsop County Communities, 2013

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>311,536,594</td>
<td>-</td>
<td>13%</td>
<td>11%</td>
<td>32%</td>
<td>9%</td>
<td>15%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Oregon</td>
<td>3,868,721</td>
<td>-</td>
<td>14%</td>
<td>10%</td>
<td>33%</td>
<td>8%</td>
<td>16%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Clatsop County</td>
<td>37,157</td>
<td>-</td>
<td>18%</td>
<td>9%</td>
<td>36%</td>
<td>9%</td>
<td>21%</td>
<td>1.7%</td>
</tr>
</tbody>
</table>

Incorporated Communities

<table>
<thead>
<tr>
<th>Community</th>
<th>Population</th>
<th>% of County</th>
<th>Older Adults</th>
<th>Youth</th>
<th>Low-Income Population</th>
<th>Zero-Vehicle Households</th>
<th>Population with Disabilities</th>
<th>Population with Limited English</th>
</tr>
</thead>
<tbody>
<tr>
<td>Astoria</td>
<td>9,518</td>
<td>26%</td>
<td>17%</td>
<td>9%</td>
<td>41%</td>
<td>9%</td>
<td>18%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Seaside</td>
<td>6,455</td>
<td>17%</td>
<td>18%</td>
<td>8%</td>
<td>39%</td>
<td>18%</td>
<td>26%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Warrenton</td>
<td>5,057</td>
<td>14%</td>
<td>12%</td>
<td>11%</td>
<td>42%</td>
<td>8%</td>
<td>23%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Cannon Beach</td>
<td>1,553</td>
<td>4%</td>
<td>28%</td>
<td>4%</td>
<td>37%</td>
<td>12%</td>
<td>23%</td>
<td>4.4%</td>
</tr>
<tr>
<td>Gearhart</td>
<td>1,513</td>
<td>4%</td>
<td>22%</td>
<td>12%</td>
<td>22%</td>
<td>2%</td>
<td>17%</td>
<td>0.3%</td>
</tr>
</tbody>
</table>

Note: The table presents data from all cities within Clatsop County. Low-Income populations are defined by households making up to 185% of the poverty level. This definition is consistent with Oregon WIC Policy 612. [1] Percentage of population for which poverty status is determined. [2] Age 18 or older. [3] Age 5 or older who speak English "less than well".

Source: U.S. Census Bureau, 2009-13 American Community Survey 5-year Estimates
## DATA RESOURCES

### Online tools

<table>
<thead>
<tr>
<th>Resource</th>
<th>Functions</th>
<th>I want to…</th>
</tr>
</thead>
<tbody>
<tr>
<td>ODOT TransGIS</td>
<td>• See map of bus routes and stops</td>
<td>• see bus stops, ACTs, or transport facilities on a map.</td>
</tr>
<tr>
<td>ODOT Transit Network Analysis</td>
<td>• See map of bus routes and stops</td>
<td>• see bus stops on a map.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• see population on a map.</td>
</tr>
<tr>
<td>U.S. Federal Poverty Guidelines</td>
<td>• See poverty guidelines (levels) by family size</td>
<td>• calculate data manually.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• create program eligibility level.</td>
</tr>
</tbody>
</table>
ANALYSIS

How do we measure Low-Income Households?
ANALYSIS

Approach 1: Dispersed (characteristic) community

• A group with a high percentage Low-Income Households

• Examples
  o Tribal members
  o Transient employees
  o Transit riders

• Methods
  o Survey (e.g. on-board)
  o Census (e.g. region, state, national scale)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Group</th>
<th>Oregon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Households</td>
<td>10,000</td>
<td>3,905,000</td>
</tr>
<tr>
<td>Low-Income Households</td>
<td>6,000</td>
<td>544,000</td>
</tr>
<tr>
<td>Ratio</td>
<td>60%</td>
<td>35%</td>
</tr>
</tbody>
</table>
ANALYSIS

Approach 2: Geography based community

• Geographic area with high percentage of Low-Income Households

• Examples:
  o County-wide dial-a-ride service area
  o Census blocks or tracts within ¼ mile of transit stops

• Methods
  o Census tables
  o Remix (using Census)
  o GIS
  o Transit plans
ANALYSIS

Examples of other equity analysis data

**OPAL Environmental Justice Oregon**
- Access to a car (0-vehicle)
- Housing & transportation burden
- Families receiving section 8 housing
- Title I schools
- Students on free or low cost school lunches.
- Households receiving Medicaid/care
- Immigrants/refugees
- People of color
- SNAP program participants

**TriMet Transit Equity Index**
- Minority population
- Low-income population
- Limited English Proficiency (LEP)
- Senior population
- Youth population
- People with disabilities
- Limited vehicle access households
- Low and medium wage jobs
- Affordable housing units
- Key retail/human/social services
## OVERVIEW

### Census Households, Families, and People

<table>
<thead>
<tr>
<th>Metric</th>
<th>Households</th>
<th>Families</th>
<th>People</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% Poverty</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>200% Poverty</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

People: 100% Poverty

Households: 100% Poverty, 200% Poverty

Families: 100% Poverty, 200% Poverty
POPULATION TO HOUSEHOLDS

Conversions

• October 2018 Guidelines: 2 methods

• Bridging Census data, OARs, and legislation

• Use with population data already evaluated, at any level

• Do not use families data

• Methods 1 and 2 produce same results
POPULATION TO HOUSEHOLDS

Method 1: Average Household Size

Low income households = \frac{\text{Low income population}}{\text{Average household size}}

<table>
<thead>
<tr>
<th>Table #</th>
<th>Title</th>
<th>Data</th>
<th>Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>C17002</td>
<td>Ratio of income to Poverty Level in the Past 12 Months</td>
<td>Low income population</td>
<td>Block group</td>
</tr>
<tr>
<td>S1701</td>
<td>Poverty Status in the Past 12 Months</td>
<td>“”</td>
<td>County, place</td>
</tr>
<tr>
<td>B25010</td>
<td>Average Household Size of Occupied Housing Units by Tenure</td>
<td>Average HH Size</td>
<td>Block group</td>
</tr>
<tr>
<td>S1101</td>
<td>Households and Families</td>
<td>“”</td>
<td>County, place</td>
</tr>
</tbody>
</table>
POPULATION TO HOUSEHOLDS

Using American FactFinder

- Advanced search
- Using search bars
- Limiting results with options
  - Topics (dataset)
  - Geography
- Clear selections before moving on
POPULATION TO HOUSEHOLDS

Method 1: Average Household Size

Table C17002

- Low income population
- Block group and up
- Ratios from 0.5 to 2.0
- Sum below 200% (OR…)
- Subtract high income

(Population above 200% poverty level)
POPULATION TO HOUSEHOLDS

Method 1: Average Household Size

Table S1701

- Low income population
- Place (city) and up
- Percent from 50% to 500%
- Read 200% below poverty level

Scroll to “ALL INDIVIDUALS WITH INCOME BELOW THE FOLLOWING POVERTY RATIOS”
POPULATION TO HOUSEHOLDS

Method 1: Average Household Size

Table B25010

- Average household size
- Block group and up
POPULATION TO HOUSEHOLDS

Method 1: Average Household Size

*Table S1101*

- Average household size
- Place (City) and up
**POPULATION TO HOUSEHOLDS**

**Method 2: Low Income Population Ratio**

\[
\text{Low income households} = \text{Total Households} \times \frac{\text{Low income population}}{\text{Total population}}
\]

<table>
<thead>
<tr>
<th>Table #</th>
<th>Title</th>
<th>Data</th>
<th>Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>B11016</td>
<td>Household Type by Household Size</td>
<td>Households</td>
<td>Block group</td>
</tr>
<tr>
<td>S1101</td>
<td>Households and Families</td>
<td>“”</td>
<td>County, place</td>
</tr>
<tr>
<td>C17002</td>
<td>Ratio of Income to Poverty Level in the Past 12 Months</td>
<td>Low income population</td>
<td>Block group</td>
</tr>
<tr>
<td>S1701</td>
<td>Poverty Status in the Past 12 Months</td>
<td>“”</td>
<td>County, place</td>
</tr>
</tbody>
</table>
POPULATION TO HOUSEHOLDS
Method 2: Low Income Population Ratio

Table B11016

- Total number of households
- Block group and up
POPULATION TO HOUSEHOLDS

Method 2: Low Income Population Ratio

Table C17002

- Low income population
- Block group and up
- Ratios from 0.5 to 2.0
- Sum below 200% (or…)
- Subtract high income
POPULATION TO HOUSEHOLDS

Remix Public Transportation: [https://platform.remix.com/](https://platform.remix.com/)

- Uses Census ACS data
- Includes metrics:
  - % population in poverty
  - % population in poverty 200% federal level
  - Can convert using methods above
- Pending metrics:
  - Number of households in poverty 200% federal level
  - % households in poverty 200% federal level
STIF REQUIREMENTS

How Low-Income Household data is used

Advisory Committee Bylaws

• Definition of high percentage of Low-Income Households to inform project selection

Local Plan

• Current and future conditions analysis that includes locations of Low-Income Households to inform service planning
REQUIREMENTS

How Low-Income Household data is used

Formula Fund Allocations & Advisory Committee Project Selection Criteria

• Increase in frequency of bus service to communities with a high percentage of Low-Income Households

• Expand bus routes and services to service communities with a high percentage of Low-Income Households

• Reduce fares in communities with a high percentage of Low-Income Households
STIF REQUIREMENTS

How Low-Income Household data is used

Measureable Outcomes

• Number of low income households served

• Annual report on actions taken to mitigate the tax impacts of passengers in low-income communities
THANK YOU!

Marsha Hoskins
503-986-3266
marsha.a.hoskins@odot.state.or.us

Jamey Dempster
503-488-2243
jdempster@nelsonnygaard.com