



What is the value of
transit use for
community health?





EasyRide HIA

Stakeholder Forum Local Transportation Experts

June 16, 2011

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Overview and Goals



- Raise awareness of intersection between transportation and health and methods for applying these concepts to improve community health (such as HIA)



- Inform local transportation experts about the EasyRide HIA and where we currently are in that process



- Get input from local transportation experts about EasyRide and its role in the larger transportation system in Nashville, especially as it relates to the HIA

Introductions

HELLO!
My name is

- Name
- Agency
- Experience with EasyRide or HIA



Background for HIA



Defining:

- Health
- Health determinants
- Health impact assessment

What is Health?

Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity.

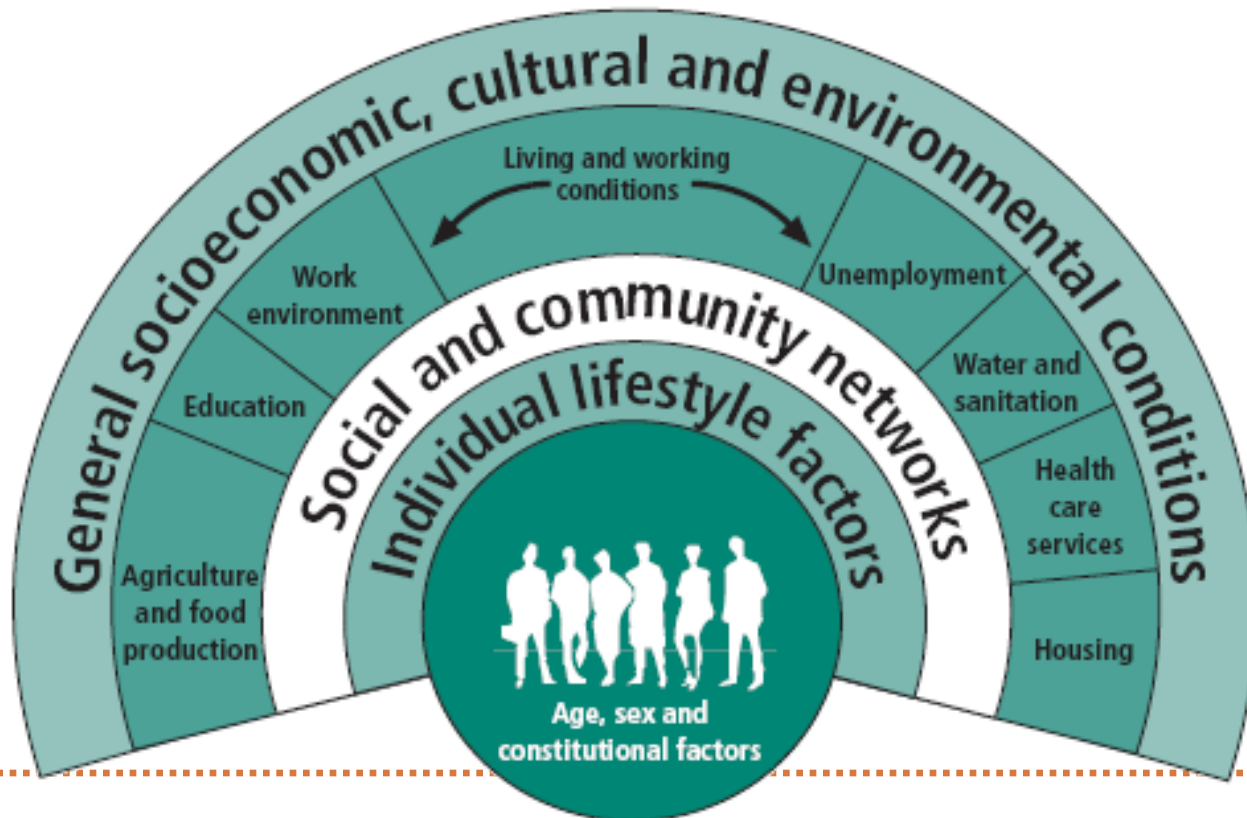


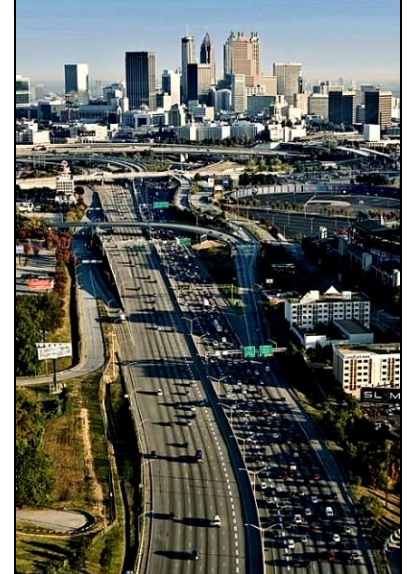
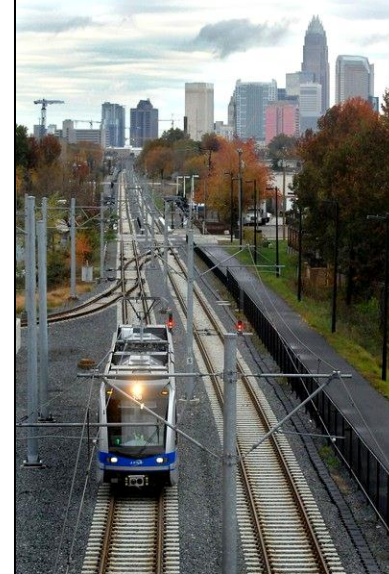
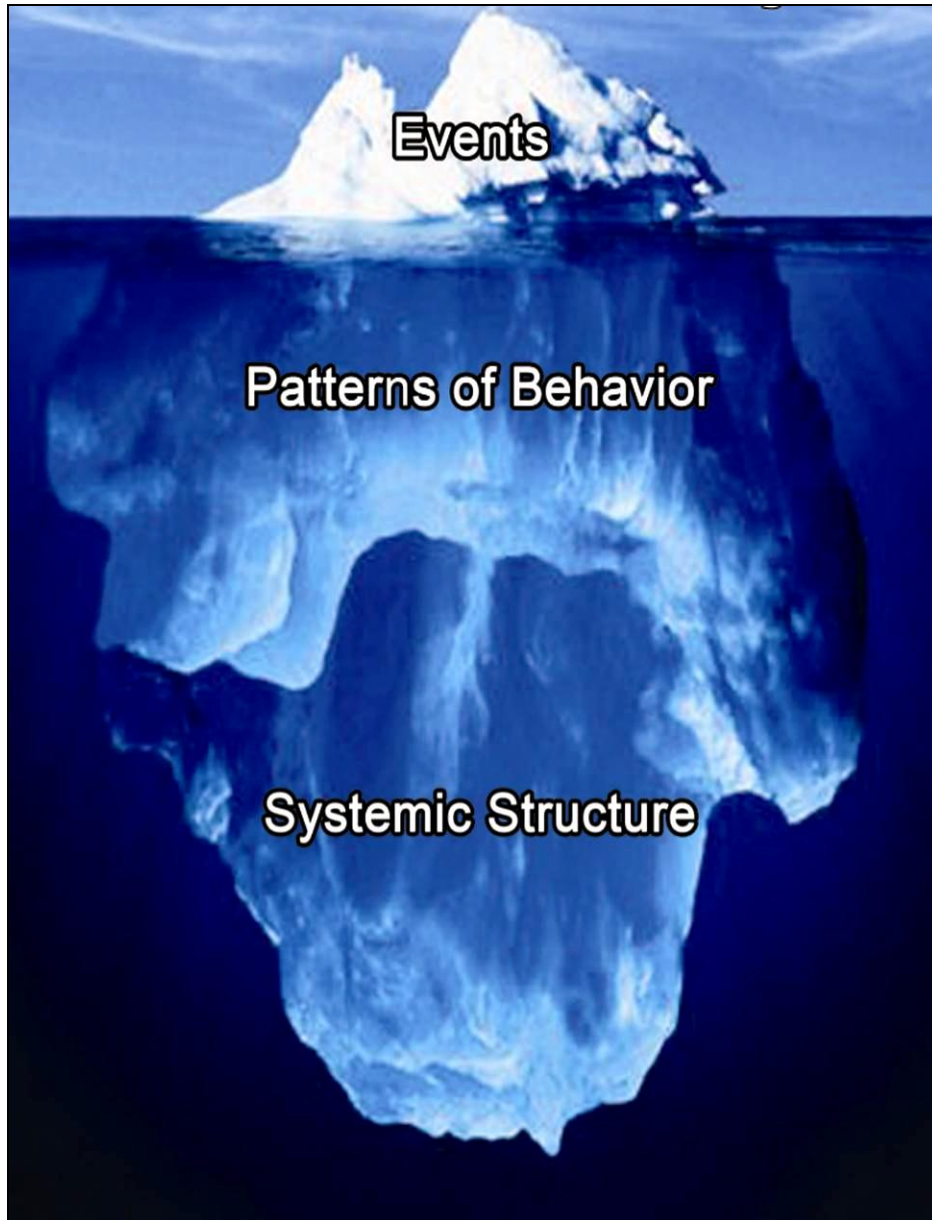
**Preamble to the Constitution of the
World Health Organization - 1948**

Health Determinants

The range of personal, social, economic and environmental factors which determine the health status of individuals or populations

*Socio-
ecologic
Model of
Health*





HIA Defined

A combination of procedures, methods and tools that systematically judges the potential effects of a policy, programme or project on the health of a population and the distribution of those effects within the population. HIA identifies appropriate actions to manage those effects.

- International Association of Impact Assessment (2006)

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Introduction to EasyRide

“Rarely does an employee benefit save both the employee and employer money. But through a great twist of the tax code, you may be able to commute with tax free dollars, and save your boss tax dollars, too.”

--Kiplinger's Personal Finance Magazine

What is EasyRide?

MTA's & RTA's Commuter Benefits Program



What are commuter benefits?

Qualified transportation fringe benefits under Title 26 U.S. Tax Code, Section 132



- Tax-free benefit for transit or vanpools
 - Up to \$230 per month
- Exceptions:
 - No benefit for carpools, bicycles, pedestrians

How do commuter benefits work?

Employers may:

- Pay for employees' transit or vanpool fares
- Allow employees to pay for transit or vanpool fares with pre-tax salary
- Use a combination of these two methods

1040 U.S. Individual Income Tax Return 2003

Label: Use the IRS instructions on page 13. Use the IRS instructions on page 13. Use the IRS instructions on page 13.

Filing Status: 1 Single, 2 Married filing jointly (even if only one had income), 3 Married filing separately, 4 Widowed, 5 Head of household (see page 20). If you are a surviving spouse, see page 20.

Exemptions: a Spouse, b Dependents. If more than five dependents, see page 21.

Income: 7 Wages, salaries, tips, etc. Attach Form W-2. 8a Taxable interest. Attach Schedule B if required. 8b Ordinary dividends. Attach Schedule B if required. 9 Qualified dividends. Attach Schedule B if required. 10 Taxable refunds, credits, or offsets of state and local income taxes (see page 23). 11 Business income or loss. Attach Schedule C or C-EZ. 12 Capital gain or loss. Attach Schedule D or E. 13a Other gains or losses. Attach Schedule D or E. 13b IRA distributions. Attach Form 4972. 14 Pensions and annuities. 15a Farm income or loss. Attach Schedule F. 15b Unemployment compensation. 16 Social security benefits. 17 Other income. List type and amount (see page 27). 18 Add the amounts in the far left column for lines 7 through 17. This is your total income. 19 Taxable amount (see page 23). 20 Taxable amount (see page 23). 21 Taxable amount (see page 23). 22 Taxable amount (see page 23). 23 Taxable amount (see page 23). 24 Taxable amount (see page 23). 25 Taxable amount (see page 23). 26 Taxable amount (see page 23). 27 Taxable amount (see page 23). 28 Taxable amount (see page 23). 29 Taxable amount (see page 23). 30 Taxable amount (see page 23). 31 Taxable amount (see page 23). 32 Taxable amount (see page 23). 33 Taxable amount (see page 23). 34 Taxable amount (see page 23). 35 Taxable amount (see page 23). 36 Taxable amount (see page 23). 37 Taxable amount (see page 23). 38 Taxable amount (see page 23). 39 Taxable amount (see page 23). 40 Taxable amount (see page 23). 41 Taxable amount (see page 23). 42 Taxable amount (see page 23). 43 Taxable amount (see page 23). 44 Taxable amount (see page 23). 45 Taxable amount (see page 23). 46 Taxable amount (see page 23). 47 Taxable amount (see page 23). 48 Taxable amount (see page 23). 49 Taxable amount (see page 23). 50 Taxable amount (see page 23). 51 Taxable amount (see page 23). 52 Taxable amount (see page 23). 53 Taxable amount (see page 23). 54 Taxable amount (see page 23). 55 Taxable amount (see page 23). 56 Taxable amount (see page 23). 57 Taxable amount (see page 23). 58 Taxable amount (see page 23). 59 Taxable amount (see page 23). 60 Taxable amount (see page 23). 61 Taxable amount (see page 23). 62 Taxable amount (see page 23). 63 Taxable amount (see page 23). 64 Taxable amount (see page 23). 65 Taxable amount (see page 23). 66 Taxable amount (see page 23). 67 Taxable amount (see page 23). 68 Taxable amount (see page 23). 69 Taxable amount (see page 23). 70 Taxable amount (see page 23). 71 Taxable amount (see page 23). 72 Taxable amount (see page 23). 73 Taxable amount (see page 23). 74 Taxable amount (see page 23). 75 Taxable amount (see page 23). 76 Taxable amount (see page 23). 77 Taxable amount (see page 23). 78 Taxable amount (see page 23). 79 Taxable amount (see page 23). 80 Taxable amount (see page 23). 81 Taxable amount (see page 23). 82 Taxable amount (see page 23). 83 Taxable amount (see page 23). 84 Taxable amount (see page 23). 85 Taxable amount (see page 23). 86 Taxable amount (see page 23). 87 Taxable amount (see page 23). 88 Taxable amount (see page 23). 89 Taxable amount (see page 23). 90 Taxable amount (see page 23). 91 Taxable amount (see page 23). 92 Taxable amount (see page 23). 93 Taxable amount (see page 23). 94 Taxable amount (see page 23). 95 Taxable amount (see page 23). 96 Taxable amount (see page 23). 97 Taxable amount (see page 23). 98 Taxable amount (see page 23). 99 Taxable amount (see page 23). 100 Taxable amount (see page 23).

Where do tax saving come from?



- Employers can save on taxes
 - Federal payroll taxes (FICA)
- Employees can save potentially on two types of taxes
 - Federal income tax
 - Federal payroll tax (FICA)

How do commuter benefits save money for employees?

Commuter benefits are non-taxable income – employees pay no income or payroll taxes on them

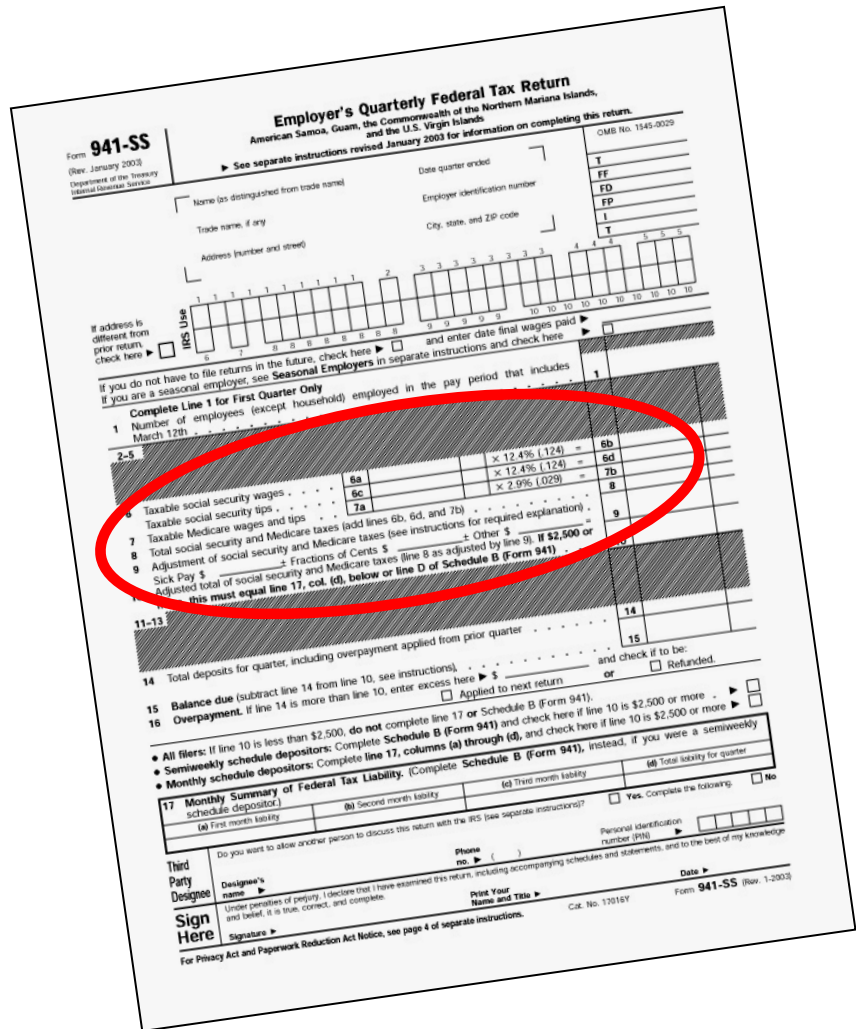
If the employer pays for a commuter benefit, it does not show up as income. There is no separate tax form for employees to fill out or any separate calculations.

A tilted image of a 2003 U.S. Individual Income Tax Return (Form 1040). The form is titled "1040 U.S. Individual Income Tax Return 2003". It includes sections for "Label", "Filing Status", "Exemptions", "Income", and "Adjusted Gross Income". The "Income" section lists various types of income such as wages, salaries, dividends, and interest. The "Adjusted Gross Income" section shows the calculation of taxable income after certain deductions. The form is numbered "1040" in the top left corner and "1040 10/03" in the bottom right corner.

How do commuter benefits save money for employers?

Commuter benefits are non-taxable income for payroll taxes

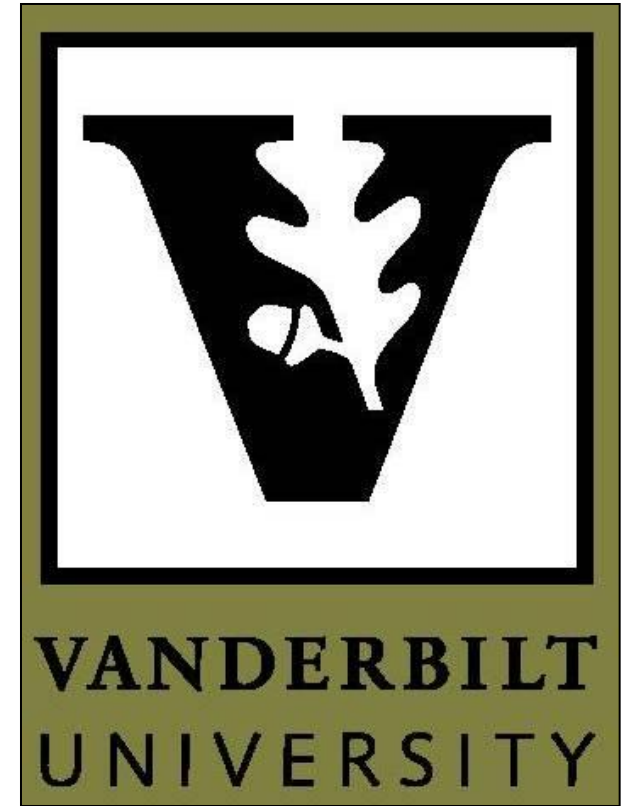
Employers use form 941-SS to file their FICA taxes every quarter. When taxable income decreases, there is no separate form to fill out.



The image shows a Form 941-SS, Employer's Quarterly Federal Tax Return, for the Northern Mariana Islands, American Samoa, Guam, and the U.S. Virgin Islands. The form is dated January 2003. A red circle highlights the section for 'Complete Line 1 for First Quarter Only', which includes lines 1 through 10. Line 1 is for the number of employees, and lines 2 through 10 are for various tax calculations, including taxable social security wages, taxable Medicare wages and tips, total social security and Medicare taxes, adjustment of social security and Medicare taxes, sick pay, and adjusted total of social security and Medicare taxes. The form also includes sections for 'Total deposits for quarter' (line 14), 'Balance due' (line 15), 'Overpayment' (line 16), and 'Monthly Summary of Federal Tax Liability' (line 17). The form is titled 'Form 941-SS (Rev. January 2003)' and 'Department of the Treasury Internal Revenue Service'.

EasyRide Partnerships

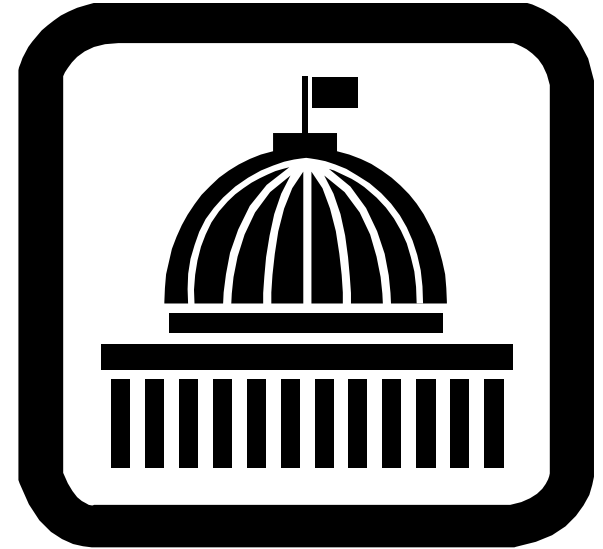
- Provides transportation services to faculty and staff as an employee benefit since July 2004
- Staff swipe their magnetic-stripped ID badges through the fare boxes for trips to and from work
- Information recorded by fare boxes and university is billed each month



44,560 Trips in May 2011

EasyRide Partnerships

- Provides transportation services to Downtown workers as an employee benefit since 2006
- Employees swipe their MTA-issued / State of Tennessee-designed cards through the fare boxes for trips to and from work
- Information recorded by fare boxes and State is billed quarterly off fixed-rate contract



State of Tennessee

44,573 Trips in May 2011

EasyRide Partnerships

- Provides transportation services to Metro workers as an employee benefit since 2006
- Employees swipe their MTA-issued EasyRide cards through the fare boxes for trips to and from work within Davidson County
- Information recorded by fare boxes and Metro is billed annually off fixed rate contract



Metropolitan
Government of
Nashville and
Davidson County

967 Trips in May 2011

EasyRide Partnerships

- Baptist Hospital
- Bass, Berry & Simms
- First Tennessee Bank
- Frist Center for the Visual Arts
- Hampton Inn
- Hilton Hotel-Downtown
- Holiday Inn-Vanderbilt
- LetterLogic
- Loews Vanderbilt
- LP Business Products
- Lipscomb University
- Metro Medical Supply
- National Association of Business Accountancy
- Nashville Electric Service
- Nashville Renaissance Hotel
- St. Thomas Hospital
- SunTrust Bank
- United Methodist Publishing House
- United States Federal Government

EasyRide

MTA's & RTA's Commuter Benefits Program

Some reasons participants join EasyRide is because their company:

- Is transit minded
- Has parking issues
- Is concerned about the environment/congestion
- Wants to stabilize employee turnover
- Wants to help provide options to the high cost of commuting
- Other companies are offering it
- Had an employee who asked management to participate
- Offers transit benefits in other markets
- Wants to offer an affordable new benefit; “Our employees already ride, why not give them the tax break.”

EasyRide

MTA's & RTA's Commuter Benefits Program

Some reasons participants aren't interested in joining EasyRide:

- Don't care how their employees get to work
- It's another hassle/responsibility for HR to administer
- "Polled my employees and nobody is interested"
- Don't perceive transit can address their commute needs
- Transit truly can't meet their commute needs
- Increase in cost of providing benefits

EasyRide

How Do We Get Customers?

- Word-of-Mouth
- Read about it in the media
- Saw it on the MTA website
- Co-worker has the program at their place of work
- Like industry is offering the program

The EasyRide HIA

- Standard steps of HIA
- What we have done thus far
- Some preliminary results

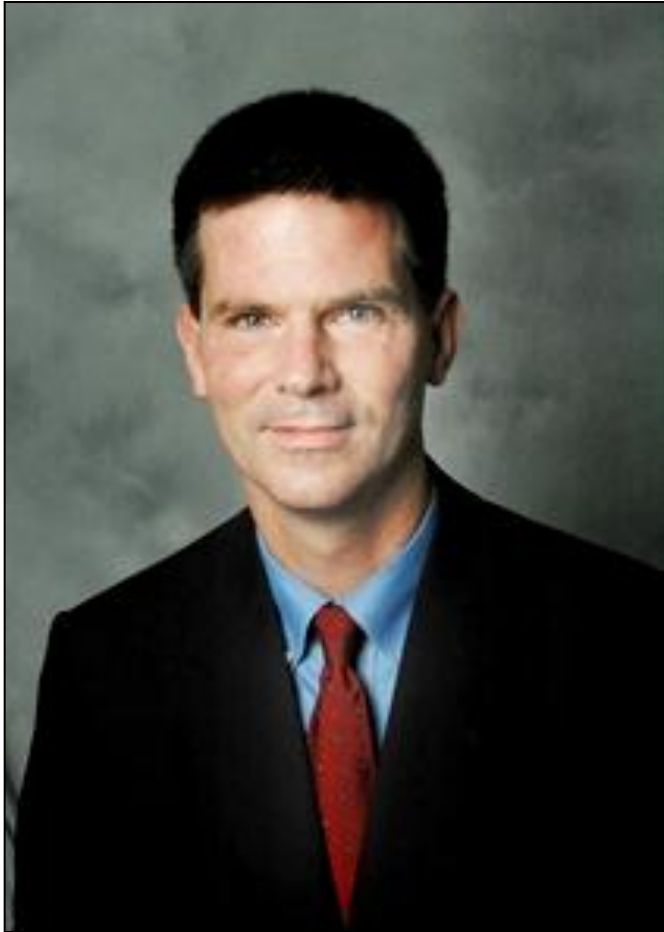


Screening



Screening determines if HIA is warranted, feasible, and would add value to the decision-making process.

Screening



- EasyRide identified by Dr. Paul
- Existing Transportation HIAs as resource
- Overlaps with other CPPW objectives
- Employer decisions have potential for wide reach

Scoping

The purposes of scoping are to create a plan for the HIA, identify priority health issues, develop research questions, specify methodologies, and define participant roles.



Scoping

- Project team identified
- Health topics:
 - Physical Activity
 - Injuries
 - Air Quality
 - Others to lesser extent
- Basic research question:
 - Who currently uses EasyRide and how?
- Focus on Metro, State, and Vanderbilt
- Ridership data and surveys
- Stakeholder input forums



Perspectives of:

Employers
Engagement / Toolkit
Assessment

Stakeholders
Engagement

Riders
(Employees)
Surveys

**Background
Research**

**EasyRide
HIA**

Decisions made by:

Employers
To Adopt or Renew

MTA
Regarding the Program

Riders
(Employees)
To Commute by Transit

Outcomes

**Increased Transit
Ridership**

**Health Behaviors
& Outcomes**

Assessment



The assessment should profile existing conditions, evaluate the potential health effects, and describe the distribution of those effects.

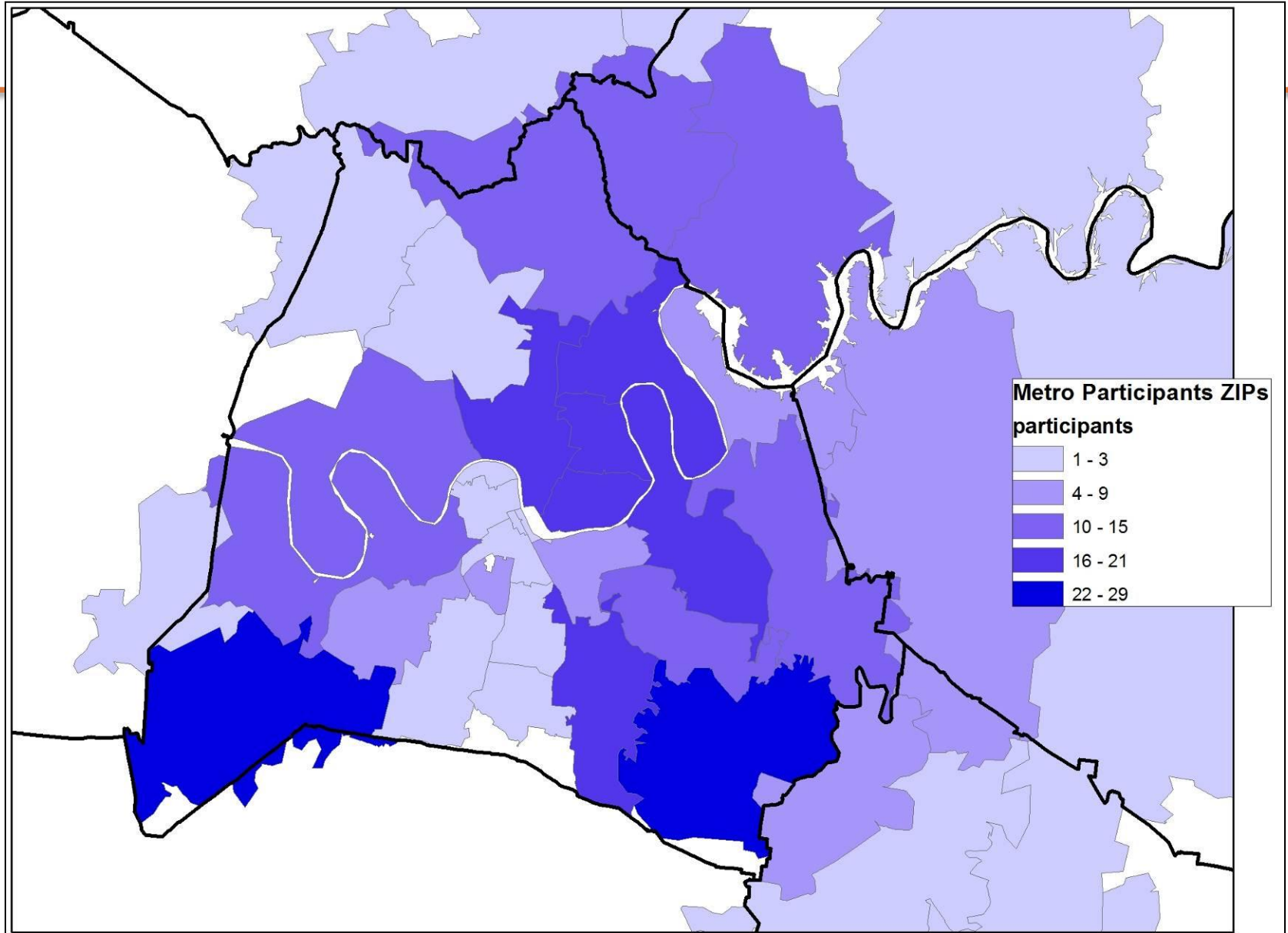
Assessment



Renewal surveys

- Metro (~400/826)
- State (132/474)
- 40% response rate
- Data being processed

Renewal surveys: Location of Metro Respondents



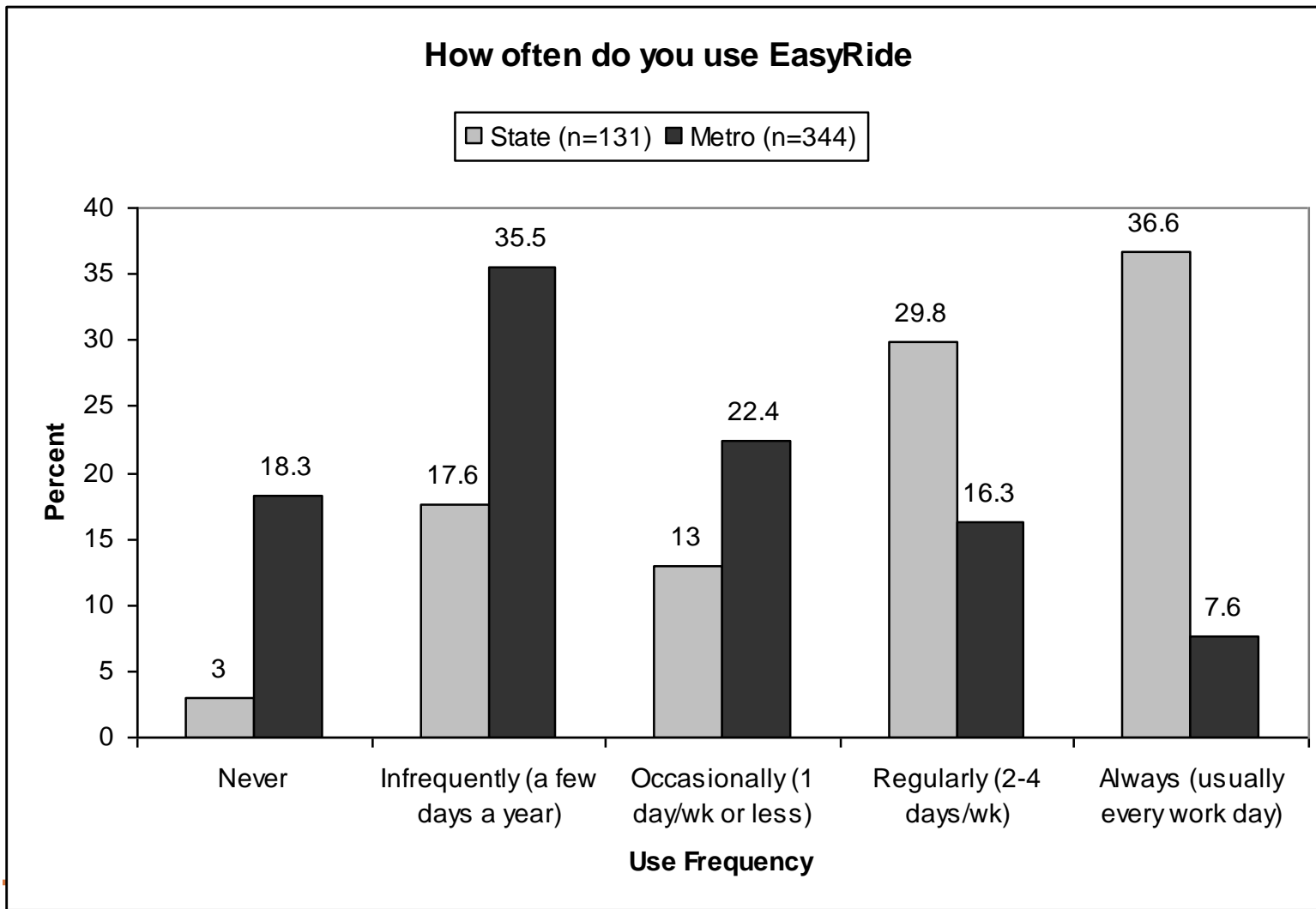
Assessment

Renewal surveys: preliminary results

- **73.3% drive alone if they don't use EasyRide**
(State & Metro n=476)
- **>98% have easy access to a car** (State & Metro n=476)
- **Average 15.1 minutes of walking to and from transit** (Metro n=61)
 - **Twice a day = 30.2 minutes of physical activity**
- **25% of always & regular riders are obese compared to 27% of people who ride occasionally or less** (Metro n=122)

Assessment

Renewal surveys: preliminary results



Assessment

MTA Ridership Data

First Quarter 2011

| | Employees | Enrolled | Unique Cards (used) | Cards used 10+ times | Cards used 25+ times | Cards used 50+ times | Cards used 100+ times |
|---------------|-----------|----------|---------------------|----------------------|----------------------|----------------------|-----------------------|
| State | 18736 | 6194 | 2292 | 1680 | 1355 | 994 | 306 |
| %of employees | 100.0% | 33.1% | 12.2% | 9.0% | 7.2% | 5.3% | 1.6% |
| %of enrolled | | 100.0% | 37.0% | 27.1% | 21.9% | 16.0% | 4.9% |
| Metro | 8941 | 1873 | 479 | 271 | 178 | 104 | 39 |
| %of employees | 100.0% | 20.9% | 5.4% | 3.0% | 2.0% | 1.2% | 0.4% |
| %of enrolled | | 100.0% | 25.6% | 14.5% | 9.5% | 5.6% | 2.1% |

Assessment

MTA Ridership Data

| Top EasyRide Routes for State and Metro Riders: 2011 First Quarter | | | |
|--|-----------|-----------------------------|--------------|
| State | | Metro | |
| Top 10 routes | %of rides | Top 10 routes | %of rides |
| 96 | 12.6% | 12 | 10.2% |
| 6 | 8.5% | 15 | 9.3% |
| 24 | 7.5% | 56 | 8.3% |
| 56 | 5.8% | 35 | 7.9% |
| 9 | 5.6% | 24 | 6.6% |
| 12 | 5.3% | 3 | 6.4% |
| 35 | 5.3% | 10 | 5.9% |
| 15 | 5.1% | 22 | 5.1% |
| 91 | 5.1% | 4 | 4.4% |
| 92 | 4.9% | 6 | 3.5% |
| 33 | 4.0% | 26 | 2.9% |
| Top 10 as % of total | | Top 10 as % of total | 70.6% |
| <i>Common bus routes in bold</i> | | | |

Assessment

MPO pilot study of Vanderbilt employees

- Compares 4 groups of commuters: drivers, bus riders, walkers, and bikers
- Bus riders spent twice the time engaged in moderate activity than drivers (6% v. 3%)
- For short trips, bus riders walked 76% of the time and drove 15% of the time
- Drivers walked only 37% of the time and drove these short trips 62% of the time

Assessment

Determining how to use existing data to examine impacts on:

- Air quality
- Injury risk



Recommendations



Recommendations should be responsive to the evidence presented in the assessment and consider feasibility from multiple perspectives.

Recommendations

- Increase ridership - provide access to EasyRide and increase use
- Role of stakeholders in determining feasibility
- Broad to employer-specific
- Recommendations for MTA (program, service, etc.)

Reporting

Reporting involves prioritizing key findings and disseminating content to target audiences in a format most useful to them.



Reporting

- Technical document
- Executive summaries tailored for stakeholders
- Objectivity and advocacy



Evaluation



The purposes of evaluation are to reflect on the HIA process, track impacts on decision-making, and identify changes in determinants and outcomes.

Discussion

1. What aspects of your organization's mission do you think are relevant for promoting healthy living in Nashville? Have you ever considered public health explicitly in your work?
2. How does your organization use data to drive decisions? How do you see the results of the HIA potentially being used by your group?
3. As we approach the reporting phase of the HIA, what are your thoughts on how to disseminate the results? What are other groups or sectors you think we should reach out to?

Wrap Up

- Next steps
- Follow up

