



# **Joint Paratransit Advisory and Planning Committee and Paratransit Technical Advisory Committee Funding Formula Subcommittee Meeting Agenda**

**Monday, December 5, 2011, 11 a.m. to 2 p.m.**

## **Meeting Outcomes:**

- Discuss data sources and calculation of the Funding Formula

11:00 – 11:10 a.m. Naomi Armenta	<b>1. Welcome &amp; Introductions</b>	
11:10 – 11:40 a.m. Staff	<b>2. Review Background</b> <b>A. Answer Questions</b> <a href="#"><i>02 Memo Funding Formula.pdf</i></a> – Page 1	I
11:40 a.m. – 12:00 p.m. Staff and Committee	<b>3. Review Data and Options</b>	A
12:00 – 12:15 p.m.	<b>4. Break</b>	
12:15 – 1:35 p.m. Staff and Committee	<b>5. Continue to Review Data and Options</b>	A
1:35 – 1:50 p.m. Staff and Committee	<b>6. Determine Initial Recommendation</b>	A
1:50 – 2:00 p.m. Staff	<b>7. Next Steps</b>	I
2:00 p.m.	<b>8. Adjournment</b>	

*Key: A – Action Item; I – Information/Discussion Item; full packet available at [www.alamedactc.org](http://www.alamedactc.org)*

**Location Information:** Alameda CTC is located in Downtown Oakland at the intersection of 14<sup>th</sup> Street and Broadway. The office is just a few steps away from the City Center/12<sup>th</sup> Street BART station. Bicycle parking is available inside the building, and in electronic lockers at 14<sup>th</sup> and Broadway near Frank Ogawa Plaza (requires purchase of key card from [bikelink.org](http://bikelink.org)). There is garage parking for autos and bicycles in the City Center Garage (enter on 14<sup>th</sup> Street between Broadway and Clay). Visit the Alameda CTC website for more information on how to get to the Alameda CTC:

<http://www.alamedactc.com/directions.html>.

**Public Comment:** Members of the public may address the committee regarding any item, including an item not on the agenda. All items on the agenda are subject to action and/or change by the committee. The chair may change the order of items.

**Accommodations/Accessibility:** Meetings are wheelchair accessible. Please do not wear scented products so that individuals with environmental sensitivities may attend. Call (510) 893-3347 (voice) or (510) 834-6754 (TTD) five days in advance to request a sign-language interpreter.



## MEMORANDUM

**To:** Joint PAPCO and TAC Subcommittee on Paratransit Funding Formula

**From:** Paratransit Coordination Team

**Date:** November 30, 2011

**Subject:** Funding Formula

At the last TAC and PAPCO meetings, the committees discussed the current formula used for the distribution of Measure B funds, and brainstormed ideas for developing a new formula that will determine the allocation of funds beginning in FY12-13. The committee determined that age, income and disability are still important issues that should be taken into account in the formula. We discussed the data that is currently available to measure these factors and committee members made a number of requests and suggestions to guide further discussion:

- Explore availability of additional data sources such as In-Home-Supportive-Services (IHSS).
- Present available data for cities rather than for planning areas and include the following data:
  - Historical data (2000 Census) for population 70-79 years old, and population 80+ years old
  - Current data for:
    - Age: Population ages 70-79 years old
    - Age: Population over 80 years old
    - Disability (including definition of “disability” in the ACS)
    - Income: Population earning under \$30,000/household/year (Alameda County median income is approximately \$68,000/household/year so this represents households earning less than ~50% AMI).

On December 5, 2011, the subcommittee will continue the discussion of data sources and of allocating funding at the planning area level. This memo presents the data on population, age, income and disability in the format requested for your consideration. Additional data sources are still being researched and any additional information will be presented at the meeting.

## Data Sources

One issue that has arisen in our further exploration of available data is that compiling data at the zip code level is not a reliable strategy for determining city allocations. Zip codes are not geographic identifiers and can be changed by the postal service at any time based on their needs. Zip codes have changed since 2000 for a number of areas of the County. Therefore, for this funding formula, data has been downloaded for all the “places” in Alameda County, this includes cities and other census designated places (CDPs).

Data is presented for the following geographies:

- Alameda
- Albany
- Berkeley
- Emeryville
- Oakland (including Piedmont)
- Hayward (including Ashland, Cherryland, Castro Valley, Fairview, and San Lorenzo)
- San Leandro
- Fremont
- Newark
- Union City
- LAVTA (including Dublin and Livermore)
- Pleasanton (including Sunol)

For reference, here is the current breakdown of funds.

**Figure 1 Current funding allocation to City-based Programs**

	<b>Percentage of Funds (current formula)</b>
<b>Alameda</b>	<b>11.83%</b>
<b>Albany</b>	<b>2.07%</b>
<b>Berkeley</b>	<b>13.76%</b>
<b>Emeryville</b>	<b>1.82%</b>
<b>Oakland</b> (includes Oakland and Piedmont)	<b>70.51%</b>
<b>NORTH COUNTY</b>	<b>100.00%</b>
<b>Hayward</b> (includes Hayward, Ashland, Cherryland, Castro Valley, Fairview and San Lorenzo)	<b>72.19%</b>
<b>San Leandro</b>	<b>27.81%</b>
<b>CENTRAL COUNTY</b>	<b>100.00%</b>
<b>Fremont</b>	<b>61.98%</b>
<b>Newark</b>	<b>13.47%</b>
<b>Union City</b>	<b>24.56%</b>
<b>SOUTH COUNTY</b>	<b>100.00%</b>
<b>Pleasanton</b> (includes Pleasanton and Sunol)	<b>38.29%</b>
<b>LAVTA</b> (includes Livermore and Dublin)	<b>61.71%</b>
<b>EAST COUNTY</b>	<b>100.00%</b>

## Age

We have the most accurate data source for age: Census 2010, shown below.

**Figure 2 Age Data (Census 2010)**

	Total Population		Age 70-79		Age 80+	
	Number	% Planning Area Total	Number	% Planning Area Total	Number	% Planning Area Total
<b>Alameda</b>	<b>73,812</b>	<b>12%</b>	<b>3,858</b>	<b>14%</b>	<b>3,186</b>	<b>15%</b>
<b>Albany</b>	<b>18,539</b>	<b>3%</b>	<b>683</b>	<b>2%</b>	<b>552</b>	<b>3%</b>
<b>Berkeley</b>	<b>112,580</b>	<b>18%</b>	<b>4,935</b>	<b>18%</b>	<b>3,655</b>	<b>17%</b>
<b>Emeryville</b>	<b>10,080</b>	<b>2%</b>	<b>444</b>	<b>2%</b>	<b>211</b>	<b>1%</b>
<i>Oakland</i>	390,724	63%	16,907	62%	12,963	62%
<i>Piedmont</i>	10,667	2%	634	2%	436	2%
<b>Oakland TOTAL</b>	<b>401,391</b>	<b>65%</b>	<b>17,541</b>	<b>64%</b>	<b>13,399</b>	<b>64%</b>
<b>NORTH COUNTY</b>	<b>616,402</b>	<b>100%</b>	<b>27,461</b>	<b>100%</b>	<b>21,003</b>	<b>100%</b>
<i>Hayward</i>	144,186	40%	5,957	37%	4,297	32%
<i>Ashland</i>	21,925	6%	691	4%	473	4%
<i>Cherryland</i>	14,728	4%	473	3%	383	3%
<i>Castro Valley</i>	61,388	17%	3,096	19%	2,807	21%
<i>Fairview</i>	10,003	3%	467	3%	371	3%
<i>San Lorenzo</i>	23,452	7%	1,175	7%	1,070	8%
<b>Hayward TOTAL</b>	<b>275,682</b>	<b>76%</b>	<b>11,859</b>	<b>73%</b>	<b>9,401</b>	<b>70%</b>
<b>San Leandro</b>	<b>84,950</b>	<b>24%</b>	<b>4,449</b>	<b>27%</b>	<b>4,067</b>	<b>30%</b>
<b>CENTRAL COUNTY</b>	<b>360,632</b>	<b>100%</b>	<b>16,308</b>	<b>100%</b>	<b>13,468</b>	<b>100%</b>
<b>Fremont</b>	<b>214,089</b>	<b>66%</b>	<b>9,393</b>	<b>64%</b>	<b>5,655</b>	<b>65%</b>
<b>Newark</b>	<b>42,573</b>	<b>13%</b>	<b>2,072</b>	<b>14%</b>	<b>977</b>	<b>11%</b>
<b>Union City</b>	<b>69,516</b>	<b>21%</b>	<b>3,203</b>	<b>22%</b>	<b>2,002</b>	<b>23%</b>
<b>SOUTH COUNTY</b>	<b>326,178</b>	<b>100%</b>	<b>14,668</b>	<b>100%</b>	<b>8,634</b>	<b>100%</b>
<i>Sunol</i>	913	0.5%	56	0.7%	20	0.4%
<i>Pleasanton</i>	70,285	35%	3,168	39%	1,884	41%
<b>Pleasanton TOTAL</b>	<b>71,198</b>	<b>36%</b>	<b>3,224</b>	<b>40%</b>	<b>1,904</b>	<b>41%</b>
<i>Dublin</i>	46,036	23%	1,508	19%	576	12%
<i>Livermore</i>	80,968	41%	3,303	41%	2,161	47%
<b>LAVTA TOTAL</b>	<b>127,004</b>	<b>64%</b>	<b>4,811</b>	<b>60%</b>	<b>2,737</b>	<b>59%</b>
<b>EAST COUNTY</b>	<b>198,202</b>	<b>100%</b>	<b>8,035</b>	<b>100%</b>	<b>4,641</b>	<b>100%</b>

As requested, for comparison, below is the population data from Census 2000 that is used in the current funding formula:

**Figure 3 Age Data (Census 2000)**

	Age 65-79		Age 80+		FOR COMPARISON: Age 80+, Census 2010	
	Number	% Planning Area Total	Number	% Planning Area Total	Number	% Planning Area Total
<b>Alameda</b>	<b>6,808</b>	<b>15%</b>	<b>2,797</b>	<b>15%</b>	<b>3,186</b>	<b>15%</b>
<b>Albany</b>	<b>1,239</b>	<b>3%</b>	<b>580</b>	<b>3%</b>	<b>552</b>	<b>3%</b>
<b>Berkeley</b>	<b>7,365</b>	<b>16%</b>	<b>3,119</b>	<b>16%</b>	<b>3,655</b>	<b>17%</b>
<b>Emeryville</b>	<b>518</b>	<b>1%</b>	<b>153</b>	<b>1%</b>	<b>211</b>	<b>1%</b>
<i>Oakland</i>	29,548	63%	12,240	63%	12,963	62%
<i>Piedmont</i>	1,081	2%	400	2%	436	2%
<b>Oakland TOTAL</b>	<b>30,629</b>	<b>66%</b>	<b>12,640</b>	<b>66%</b>	<b>13,399</b>	<b>64%</b>
<b>NORTH COUNTY</b>	<b>46,559</b>		<b>19,289</b>		<b>21,003</b>	
<i>Hayward</i>	10,487	34%	3,740	30%	4,297	32%
<i>Ashland</i>	1,347	4%	548	4%	473	4%
<i>Cherryland</i>	873	3%	440	4%	383	3%
<i>Castro Valley</i>	5,785	19%	2,610	21%	2,807	21%
<i>Fairview</i>	894	3%	221	2%	371	3%
<i>San Lorenzo</i>	2,666	9%	838	7%	1,070	8%
<b>Hayward TOTAL</b>	<b>22,052</b>	<b>71%</b>	<b>8,397</b>	<b>68%</b>	<b>9,401</b>	<b>70%</b>
<b>San Leandro</b>	<b>8,815</b>	<b>29%</b>	<b>3,873</b>	<b>32%</b>	<b>4,067</b>	<b>30%</b>
<b>CENTRAL COUNTY</b>	<b>30,867</b>		<b>12,270</b>		<b>13,468</b>	
<b>Fremont</b>	<b>13,252</b>	<b>66%</b>	<b>3,715</b>	<b>68%</b>	<b>5,655</b>	<b>65%</b>
<b>Newark</b>	<b>2,755</b>	<b>14%</b>	<b>569</b>	<b>10%</b>	<b>977</b>	<b>11%</b>
<b>Union City</b>	<b>4,222</b>	<b>21%</b>	<b>1,214</b>	<b>22%</b>	<b>2,002</b>	<b>23%</b>
<b>SOUTH COUNTY</b>	<b>20,229</b>		<b>5,498</b>		<b>8,634</b>	
<i>Sunol</i>	113	1.2%	29	1.1%	20	0.4%
<i>Pleasanton</i>	3,664	40%	1,174	43%	1,884	41%
<b>Pleasanton TOTAL</b>	<b>3,777</b>	<b>41%</b>	<b>1,203</b>	<b>44%</b>	<b>1,904</b>	<b>41%</b>
<i>Dublin</i>	1,140	12%	241	9%	576	12%
<i>Livermore</i>	4,245	46%	1,271	47%	2,161	47%
<b>LAVTA TOTAL</b>	<b>5,385</b>	<b>59%</b>	<b>1,512</b>	<b>56%</b>	<b>2,737</b>	<b>59%</b>
<b>EAST COUNTY</b>	<b>9,162</b>		<b>2,715</b>		<b>4,641</b>	

## Disability

As discussed in the previous meeting, disability data is not included in either the 2010 Census or the ACS 3-year or 5-year samples. Social Security Administration data is no longer available at the zip code level due to privacy concerns. Staff has continued to explore other opportunities for identifying incidence of disability. The only data source that has been identified is described below.

Data from the American Community Survey (ACS) is available annually, limited to jurisdictions of 65,000 people or more. One methodology that has been used by other places in the country is to average these 1-year samples over time, which provides a large enough sample size to create a valid figure. The available data according to this methodology is presented below. However, there are still a number of problems with this data source:

1. There is still a margin of error, so this data may not be completely accurate.
2. This only covers 75% of the county, not including small cities or unincorporated areas. As shown in the table below, there are data gaps in every part of the County.
3. The definition of disability has changed slightly over time, which means that this “averaging” methodology is not a pure comparison of apples to apples.



Figure 4 Disability Data (Average ACS 1-Year Estimates, 2005-1010)

	Population with Disability	% Planning Area Total
<b>Alameda</b>	<b>7,194</b>	<b>11%</b>
<b>Albany</b>	-	-
<b>Berkeley</b>	<b>10,293</b>	<b>15%</b>
<b>Emeryville</b>	-	-
<i>Oakland</i>	<i>49,868</i>	<i>74%</i>
<i>Piedmont</i>	-	-
<b>Oakland TOTAL</b>	<b>49,868</b>	<b>74%</b>
<b>NORTH COUNTY</b>	<b>67,355</b>	<b>100%</b>
<i>Hayward</i>	<i>14,599</i>	<i>63%</i>
<i>Ashland</i>	-	-
<i>Cherryland</i>	-	-
<i>Castro Valley</i>	-	-
<i>Fairview</i>	-	-
<i>San Lorenzo</i>	-	-
<b>Hayward TOTAL</b>	<b>14,599</b>	<b>63%</b>
<b>San Leandro</b>	<b>8,753</b>	<b>37%</b>
<b>CENTRAL COUNTY</b>	<b>23,352</b>	<b>100%</b>
<b>Fremont</b>	<b>16,974</b>	<b>74%</b>
<b>Newark</b>	-	-
<b>Union City</b>	<b>6,062</b>	<b>26%</b>
<b>SOUTH COUNTY</b>	<b>23,036</b>	<b>100%</b>
<i>Sunol</i>	-	-
<i>Pleasanton</i>	<i>5,147</i>	<i>42%</i>
<b>Pleasanton TOTAL</b>	<b>5,147</b>	<b>42%</b>
<i>Dublin</i>	-	-
<i>Livermore</i>	<i>7,181</i>	<i>58%</i>
<b>LAVTA TOTAL</b>	<b>7,181</b>	<b>58%</b>
<b>EAST COUNTY</b>	<b>12,329</b>	<b>100%</b>

Given the many disadvantages of this data source, staff encourages the committees to give renewed consideration to the possibility of using age as a surrogate for disability in this funding formula. Age is considered to be the strongest predictor of the incidence of disability and accurate and reliable age data is available from the 2010 Census.

## Income

Income data is not available in the 2010 Census. Income data is available from the American Community Survey (ACS) 5-year samples. The 2010 5-year sample is not yet available, so 2009 data is used for this memo.

**Figure 5 Households with Income less than \$20,000 (ACS 2009 5-Year Estimates)**

	Number	% Planning Area Total
<b>Alameda</b>	<b>3,391</b>	<b>7%</b>
<b>Albany</b>	<b>770</b>	<b>2%</b>
<b>Berkeley</b>	<b>8,229</b>	<b>17%</b>
<b>Emeryville</b>	<b>1,076</b>	<b>2%</b>
<i>Oakland</i>	<b>34,932</b>	<b>72%</b>
<i>Piedmont</i>	<b>82</b>	<b>0.2%</b>
<b>Oakland TOTAL</b>	<b>35,014</b>	<b>72%</b>
<b>NORTH COUNTY</b>	<b>48,480</b>	<b>100%</b>
<i>Hayward</i>	<b>5,813</b>	<b>40%</b>
<i>Ashland</i>	<b>1,297</b>	<b>9%</b>
<i>Cherryland</i>	<b>677</b>	<b>5%</b>
<i>Castro Valley</i>	<b>2,126</b>	<b>15%</b>
<i>Fairview</i>	<b>192</b>	<b>1%</b>
<i>San Lorenzo</i>	<b>852</b>	<b>6%</b>
<b>Hayward TOTAL</b>	<b>10,957</b>	<b>76%</b>
<b>San Leandro</b>	<b>3,431</b>	<b>24%</b>
<b>CENTRAL COUNTY</b>	<b>14,388</b>	<b>100%</b>
<b>Fremont</b>	<b>4,423</b>	<b>60%</b>
<b>Newark</b>	<b>957</b>	<b>13%</b>
<b>Union City</b>	<b>1,935</b>	<b>26%</b>
<b>SOUTH COUNTY</b>	<b>7,315</b>	<b>100%</b>
<i>Sunol</i>	<b>18</b>	<b>0.4%</b>
<i>Pleasanton</i>	<b>1,234</b>	<b>29%</b>
<b>Pleasanton TOTAL</b>	<b>1,252</b>	<b>29%</b>
<i>Dublin</i>	<b>667</b>	<b>16%</b>
<i>Livermore</i>	<b>2,379</b>	<b>55%</b>
<b>LAVTA TOTAL</b>	<b>3,046</b>	<b>71%</b>
<b>EAST COUNTY</b>	<b>4,298</b>	<b>100%</b>

The following chart compares the funding allocations to each program according to three different methodologies: 1) by age, 2) by age plus income, and 3) by age, income and disability. The allocations according to the current distribution formula are also shown for comparison.

Age in each of these is the population 70-79 plus the population 80 and above with the current weighting (multiplied by 1.5).

**Figure 6 Comparison of Funding Allocations by Methodology (% of Funds)**

	Age (Figure 2)	Age & Income (Figures 2 and 6)	Age, Income & Disability* (Figures 2, 5, and 6)	Current Formula
<b>Alameda</b>	<b>15%</b>	<b>11%</b>	<b>11%</b>	<b>11.83%</b>
<b>Albany</b>	<b>3%</b>	<b>2%</b>	<b>1%</b>	<b>2.07%</b>
<b>Berkeley</b>	<b>18%</b>	<b>17%</b>	<b>17%</b>	<b>13.76%</b>
<b>Emeryville</b>	<b>1%</b>	<b>2%</b>	<b>1%</b>	<b>1.82%</b>
<i>Oakland</i>	62%	66%	69%	
<i>Piedmont</i>	2%	1%	1%	
<b>Oakland TOTAL</b>	<b>64%</b>	<b>68%</b>	<b>70%</b>	<b>70.51%</b>
<b>NORTH COUNTY</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100.00%</b>
<i>Hayward</i>	34%	36%	44%	
<i>Ashland</i>	4%	5%	4%	
<i>Cherryland</i>	3%	3%	2%	
<i>Castro Valley</i>	20%	19%	13%	
<i>Fairview</i>	3%	2%	2%	
<i>San Lorenzo</i>	8%	7%	5%	
<b>Hayward TOTAL</b>	<b>71%</b>	<b>73%</b>	<b>69%</b>	<b>72.19%</b>
<b>San Leandro</b>	<b>29%</b>	<b>27%</b>	<b>31%</b>	<b>27.81%</b>
<b>CENTRAL COUNTY</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100.00%</b>
<b>Fremont</b>	<b>65%</b>	<b>64%</b>	<b>68%</b>	<b>61.98%</b>
<b>Newark</b>	<b>13%</b>	<b>13%</b>	<b>8%</b>	<b>13.47%</b>
<b>Union City</b>	<b>22%</b>	<b>23%</b>	<b>25%</b>	<b>24.56%</b>
<b>SOUTH COUNTY</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100.00%</b>
<i>Sunol</i>	0.6%	0.5%	0.3%	
<i>Pleasanton</i>	40%	37%	39%	
<b>Pleasanton TOTAL</b>	<b>41%</b>	<b>38%</b>	<b>39%</b>	<b>38.29%</b>
<i>Dublin</i>	16%	16%	10%	
<i>Livermore</i>	44%	46%	51%	
<b>LAVTA TOTAL</b>	<b>59%</b>	<b>62%</b>	<b>61%</b>	<b>61.71%</b>
<b>EAST COUNTY</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100.00%</b>

\*Disability data is not available for this community.

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