What is the value of transit use for community health?

NashVitality

EasyRide HIA

Stakeholder Forum
Local Transportation Experts

June 16, 2011

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Board of Directors, Transit Now Nashville

Overview and Goals

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

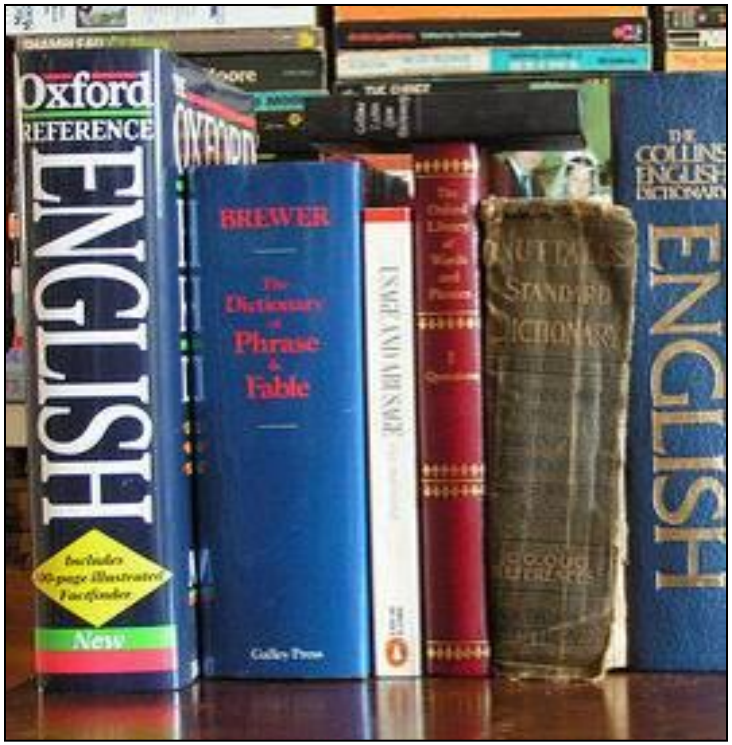
- Inform local transportation experts about the EasyRide HIA and where we currently are in that process

- 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

- 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

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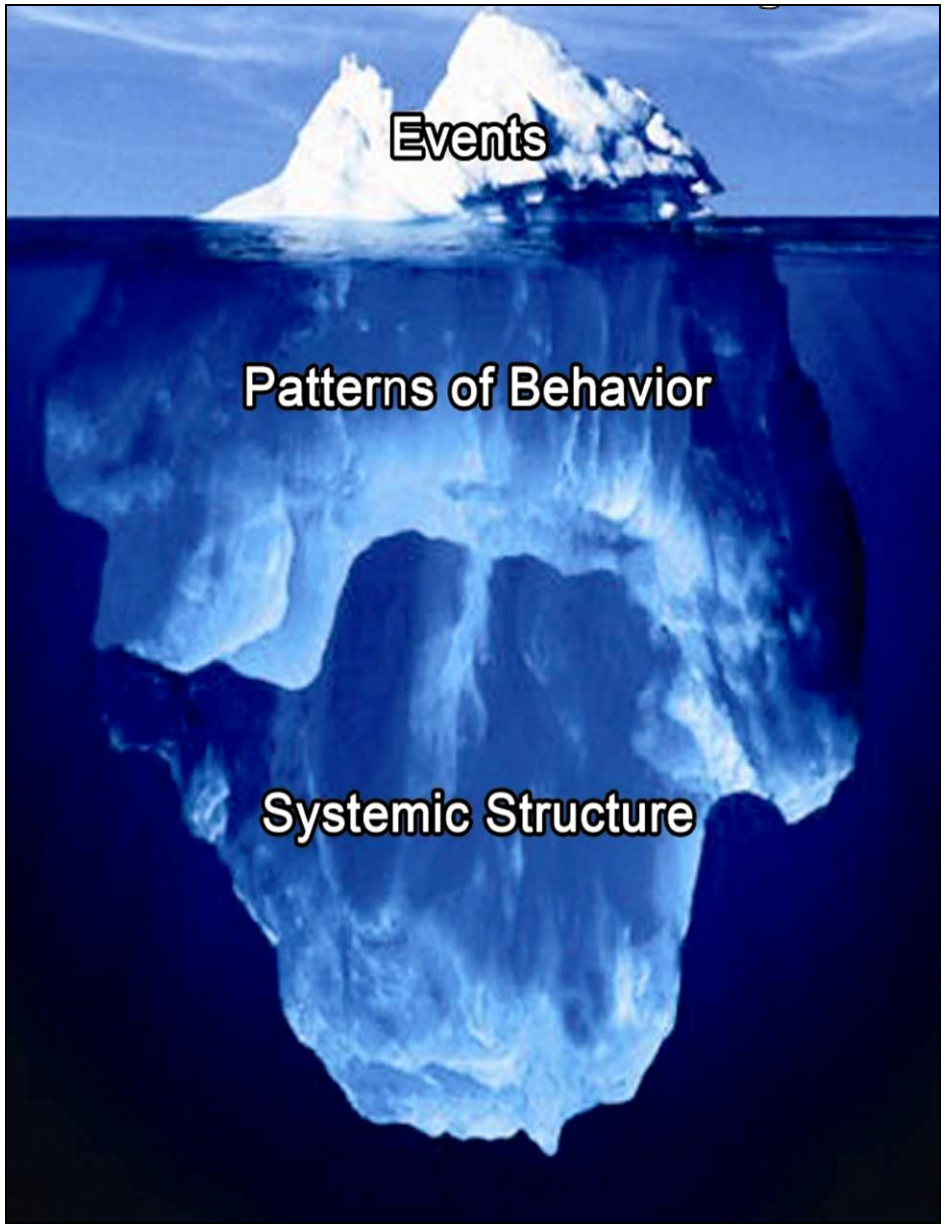
Events
Patterns of Behavior
Systemic Structure

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

Easy Ride
MTA·RTA COMMUTER PROGRAM

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What is EasyRide?

MTA's & RTA's Commuter Benefits Program

Easy Ride
MTA·RTA COMMUTER PROGRAM

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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

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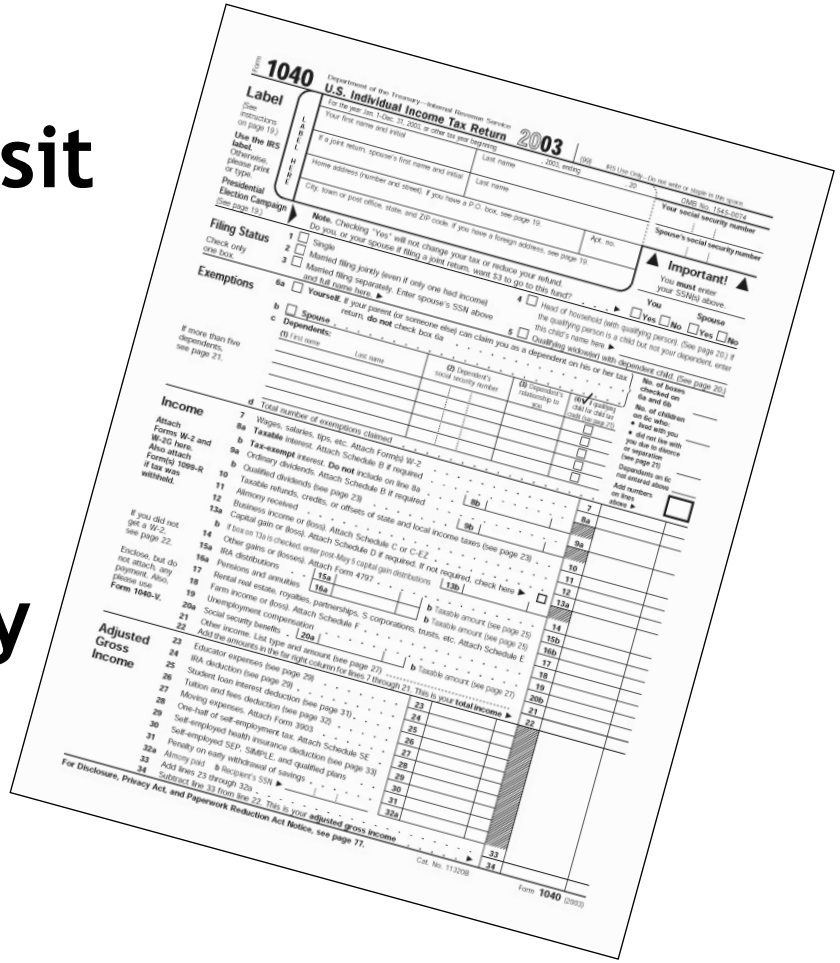
How do commuter benefits work?

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



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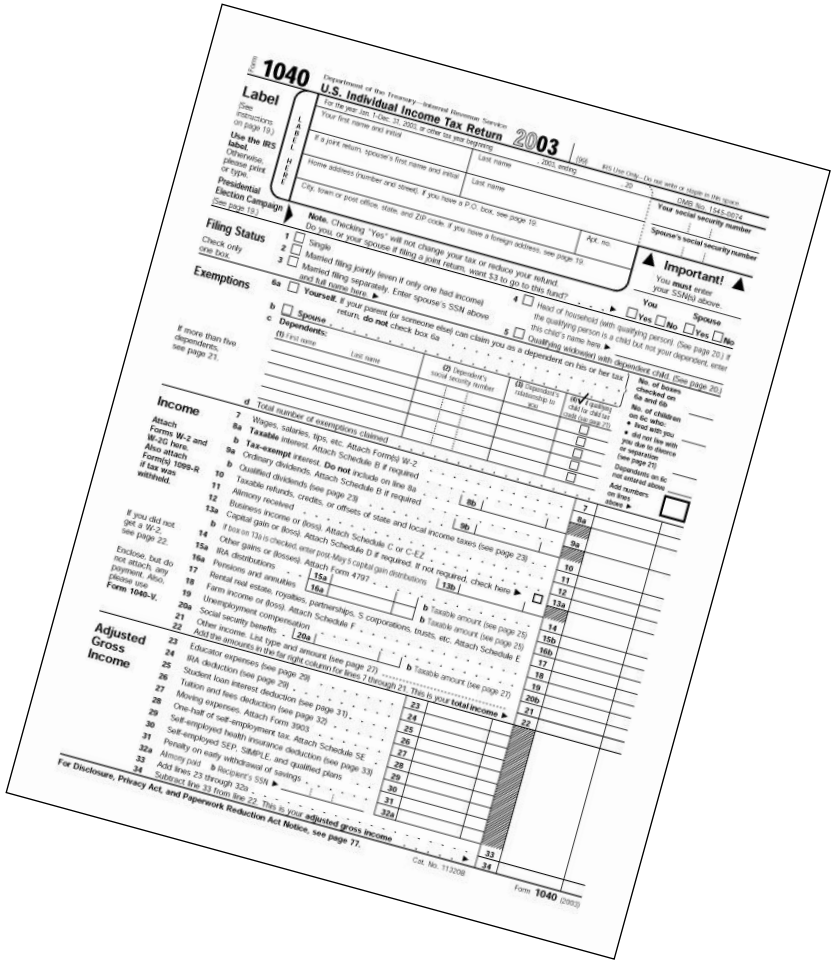
Where do tax saving come from?

- 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.


1040 U.S. Individual Income Tax Return 2003

Label

Filing Status

Exemptions

Income

Adjusted Gross Income

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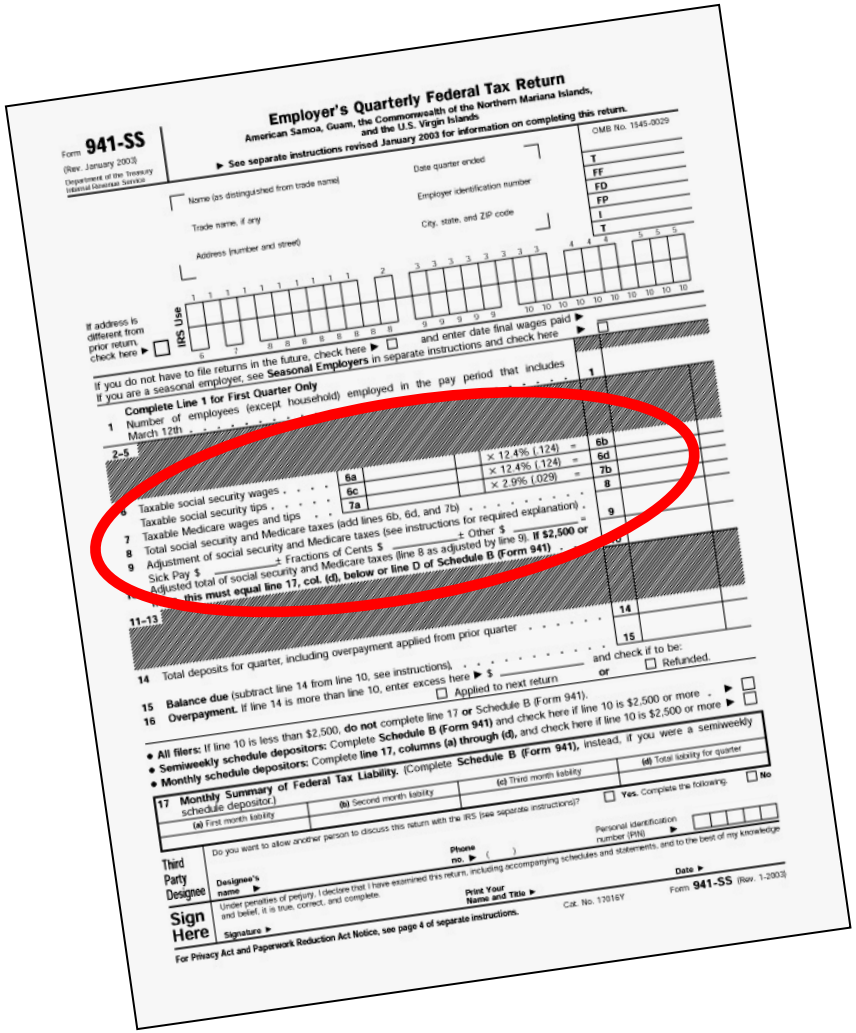
How do commuter benefits save money for employers?

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.



Form **941-SS** (Rev. January 2003) Department of the Treasury Internal Revenue Service

Employer's Quarterly Federal Tax Return
American Samoa, Guam, the Commonwealth of the Northern Mariana Islands, and the U.S. Virgin Islands

▶ See separate instructions revised January 2003 for information on completing this return.

OMB No. 1545-0029

Name (as distinguished from trade name) | Date quarter ended | T
Trade name, if any | Employer identification number | FF
Address (number and street) | City, state, and ZIP code | FD | FP | I | T

If address is different from prior return, check here ▶ ☐ IRS Use

If you do not have to file returns in the future, check here ▶ ☐ and enter date final wages paid ▶
If you are a seasonal employer, see **Seasonal Employers** in separate instructions and check here ▶

Complete Line 1 for First Quarter Only
1 Number of employees (except household) employed in the pay period that includes March 12th . . . 1

2–5

6 Taxable social security wages . . . 6a × 12.4% (.124) = 6b
Taxable social security tips . . . 6c × 12.4% (.124) = 6d
7 Taxable Medicare wages and tips . . . 7a × 2.9% (.029) = 7b
8 Total social security and Medicare taxes (add lines 6b, 6d, and 7b) . . . 8
9 Adjustment of social security and Medicare taxes (see instructions for required explanation) . . . 9
Sick Pay $ _____ ± Fractions of Cents $ _____ ± Other $ _____ =
Adjusted total of social security and Medicare taxes (line 8 as adjusted by line 9). **If $2,500 or more, this must equal line 17, col. (d), below or line D of Schedule B (Form 941)** . . . 10

11–13

14 Total deposits for quarter, including overpayment applied from prior quarter . . . 14
15 **Balance due** (subtract line 14 from line 10, see instructions) . . . 15 and check if to be: ☐ Applied to next return or ☐ Refunded.
16 **Overpayment.** If line 14 is more than line 10, enter excess here ▶ $ _____ ▶ ☐

- **All filers:** If line 10 is less than $2,500, **do not** complete line 17 **or** Schedule B (Form 941).
- **Semiweekly schedule depositors:** Complete **Schedule B (Form 941)** and check here if line 10 is $2,500 or more ▶ ☐
- **Monthly schedule depositors:** Complete **line 17, columns (a) through (d),** and check here if line 10 is $2,500 or more ▶ ☐

17 **Monthly Summary of Federal Tax Liability.** (Complete **Schedule B (Form 941)**, instead, if you were a semiweekly schedule depositor.)

(a) First month liability	(b) Second month liability	(c) Third month liability	(d) Total liability for quarter

Third Party Designee Do you want to allow another person to discuss this return with the IRS (see separate instructions)? ☐ **Yes.** Complete the following. ☐ **No**
Designee's name ▶ Phone no. ▶ ( ) Personal identification number (PIN) ▶

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.
Signature ▶ Print Your Name and Title ▶ Date ▶

For Privacy Act and Paperwork Reduction Act Notice, see page 4 of separate instructions. Cat. No. 13016Y Form **941-SS** (Rev. 1-2003)

Easy Ride MTA·RTA COMMUTER PROGRAM

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EasyRide Partnerships

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

VANDERBILT UNIVERSITY

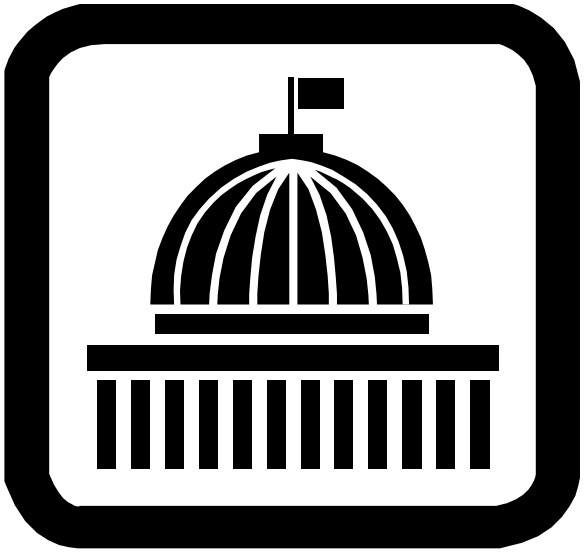
44,560 Trips in May 2011

Easy Ride MTA·RTA COMMUTER PROGRAM

NashVitality

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

Easy Ride
MTA·RTA COMMUTER PROGRAM

NashVitality

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

Easy Ride
MTA·RTA COMMUTER PROGRAM

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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."

Easy Ride
MTA·RTA COMMUTER PROGRAM

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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

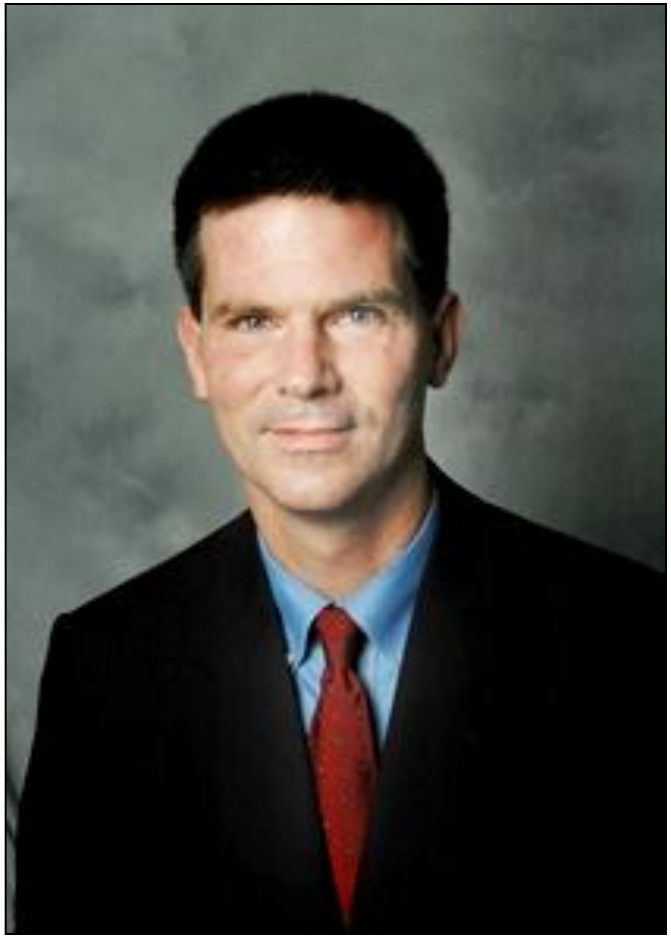
The EasyRide HIA

- 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



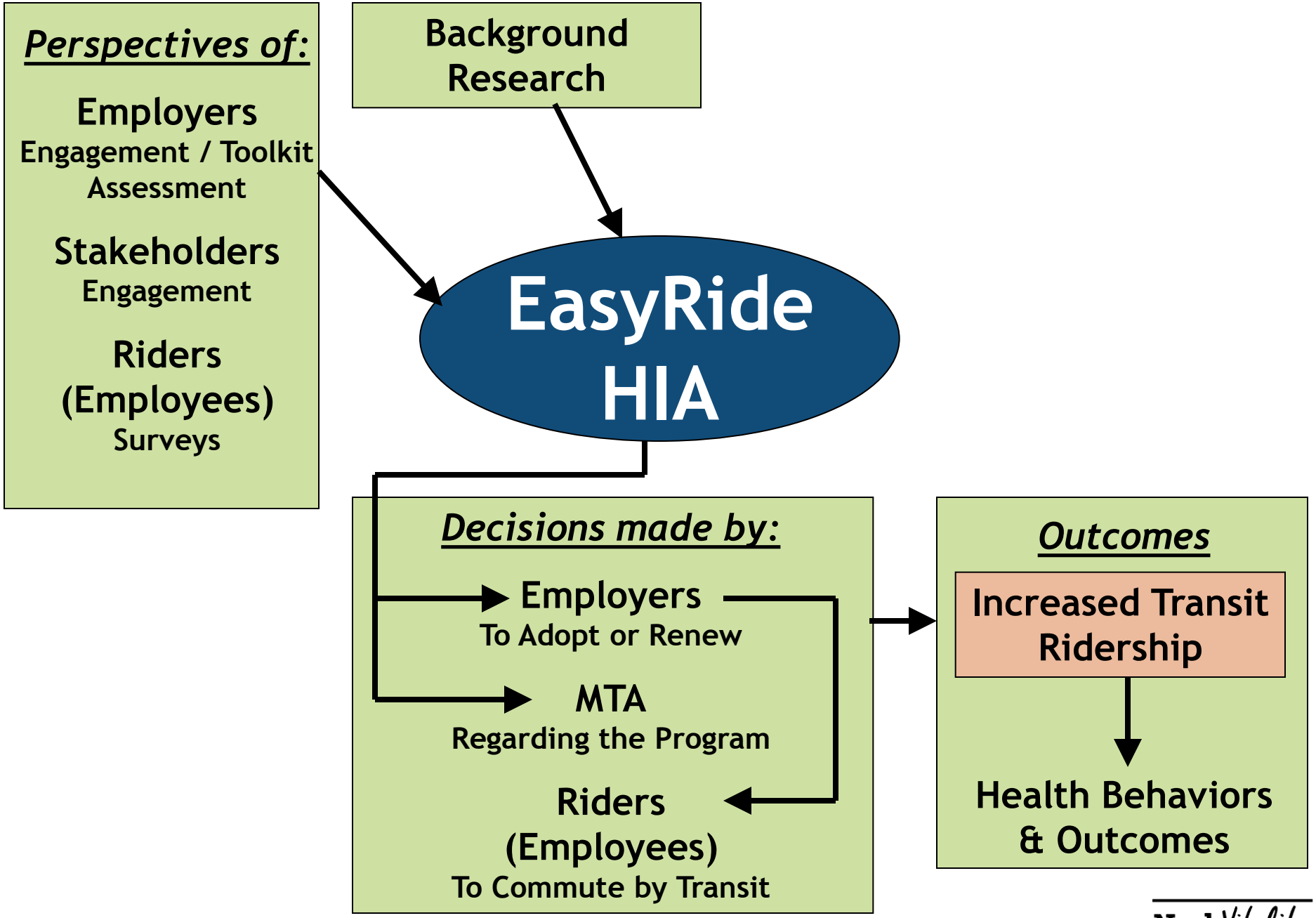
- EasyRide identified by Dr. Paul
- Existing Transportation HIAs as resource
- Overlaps with other CPPW objectives
- Employer decisions have potential for wide reach

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

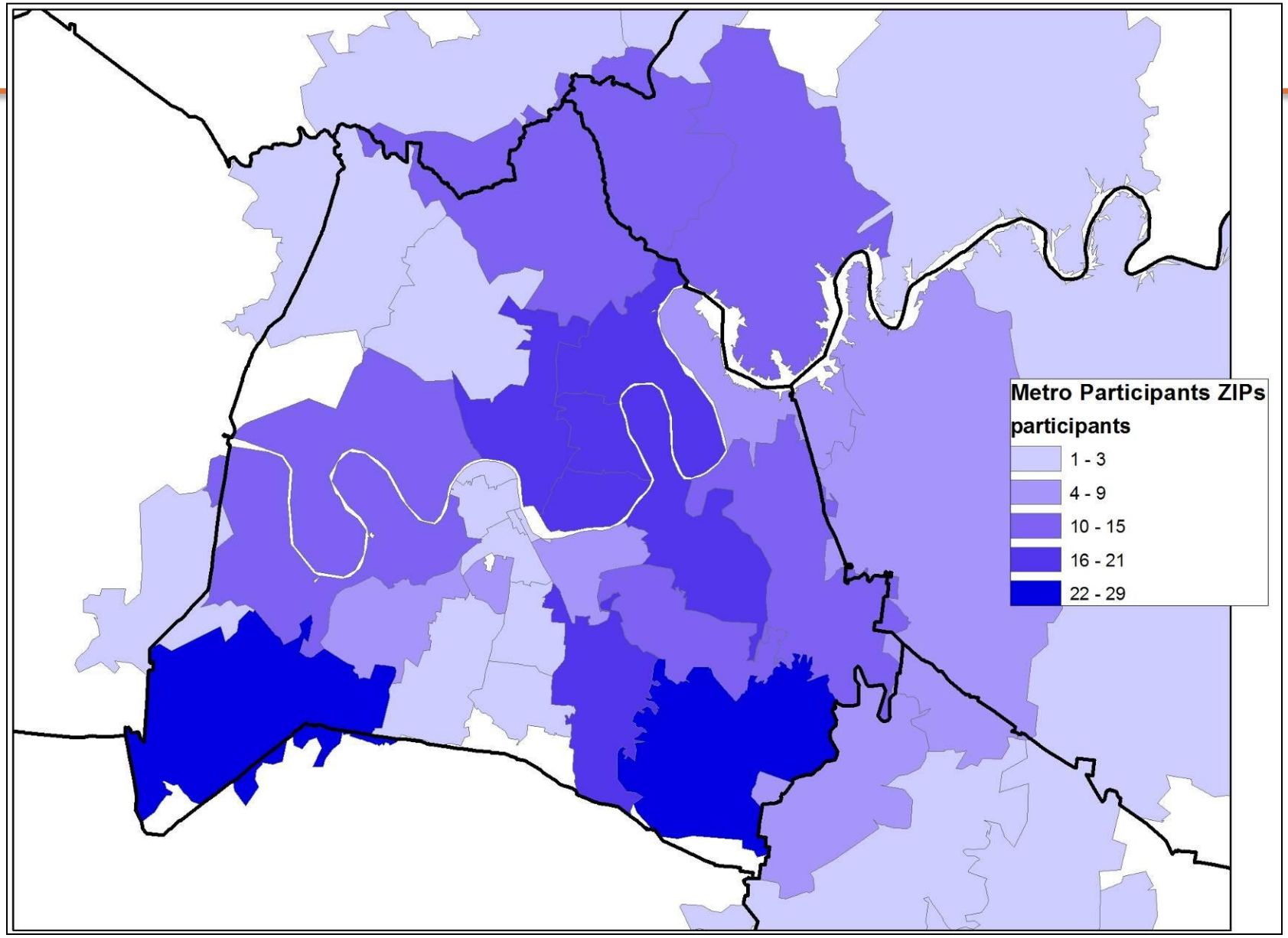
The assessment should profile existing conditions, evaluate the potential health effects, and describe the distribution of those effects.

Assessment

Renewal surveys

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

Renewal surveys: Location of Metro Respondents



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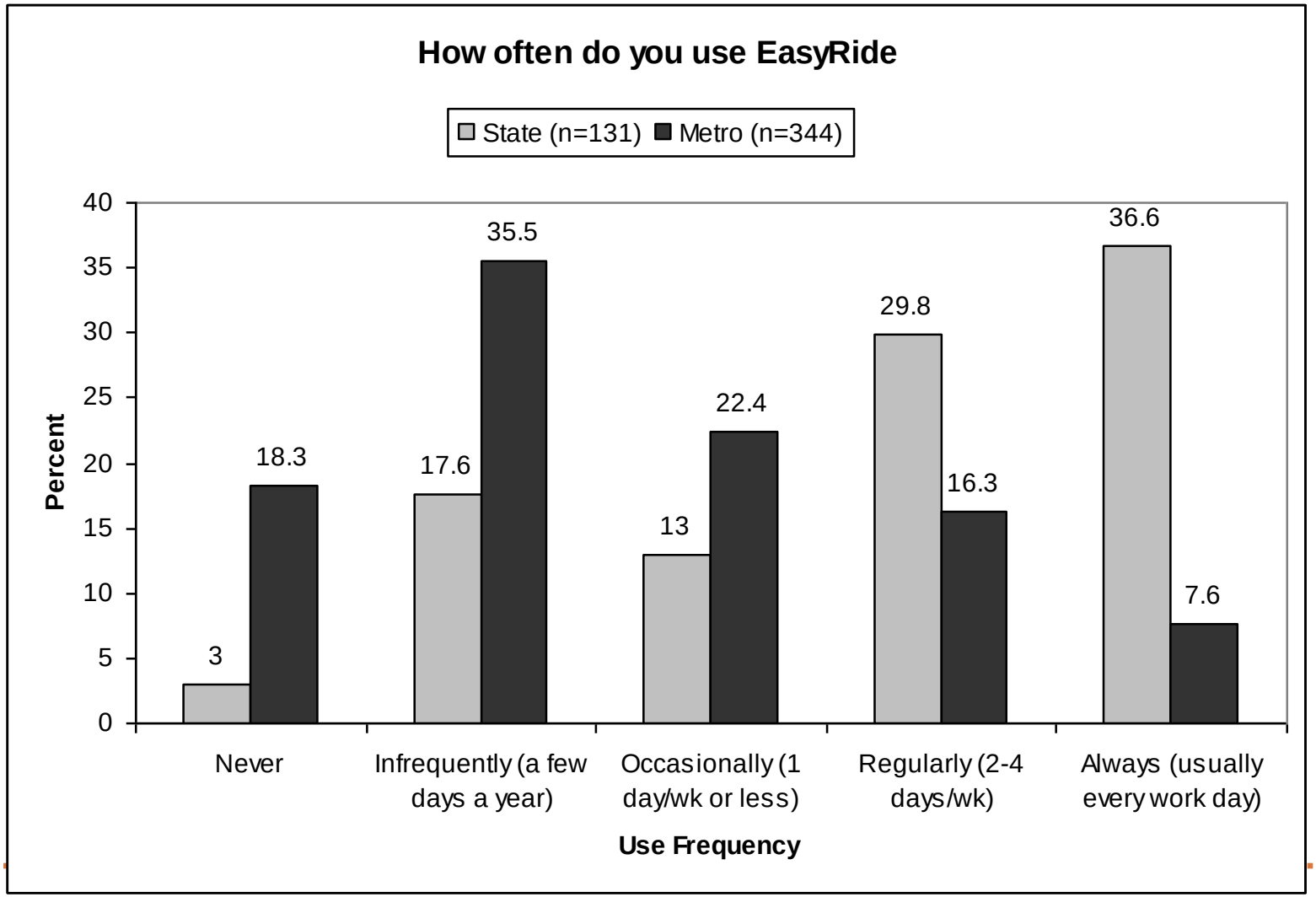
Assessment

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



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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%**

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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	*69.6%*	***Top 10 as % of total***	*70.6%*
Common bus routes in bold			

Assessment

MPO pilot study of Vanderbilt employees

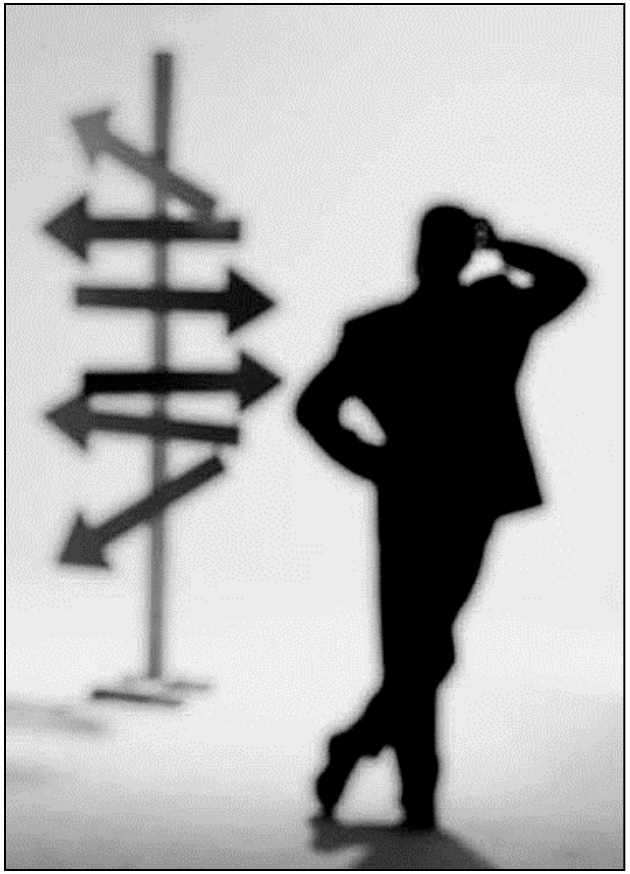
- Compares 4 groups of commuters: drivers, bus riders, walkers, and bikers
- Bus riders spent twice the time engaged in moderate activity than drivers (6% v. 3%)
- For short trips, bus riders walked 76% of the time and drove 15% of the time
- Drivers walked only 37% of the time and drove these short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

Funded in full by the U.S. Department of Health and Human Services, as part of the American Recovery and Reinvestment Act of 2009

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