

Proposed ORCA LIFT subsidy program's relation to King County Equity and Social Justice Strategic Plan

Metro's proposed new ORCA LIFT subsidy program, developed to support mobility for people in extreme poverty, helps implement the King County Equity and Social Justice (ESJ) Strategic Plan by applying the County's [Equity Impact Review \(EIR\) process](#) to identify, evaluate, and communicate the potential impacts - both positive and negative - of a policy or program on equity. The table on the next page maps how Metro collaborated with the Office of Equity and Social Justice to use the EIR process to co-design the newly proposed subsidy with communities most in need to advance the overall vision, values and the relevant core strategies of the ESJ Strategic Plan to lead with racial justice:

- **Invest Upstream and Where Needs Are Greatest**
- **Invest in Community Partnerships**
- **With Transparent and Accountable Leadership**



King County Equity Impact Review (EIR) Process

Phase 1: Scope.
Identify who will be affected

Phase 2: Assess equity and community context

Brief Summary of Findings/Recommendations from Metro's Use of the EIR

[Rising income inequality](#) and the suburbanization of poverty have led to complex transportation needs, particularly for no- and very-low income communities in King County. Native and Indigenous Peoples, People of Color, Immigrants and Refugees, and Limited English-speaking people disproportionately make up no- and very-low income households in the region, particularly in South King County. People with the lowest incomes pay a higher percentage of their income on transit than [people at higher income levels](#).^{1,2} People with no-, very-low and low-incomes rely more heavily on public transit in order to access basic needs such as jobs, food, housing, education, and health and social services. They are heavily cost-burdened, spending a greater percentage of their income on transportation, potentially contributing to a wide range of inequities in health and well-being.³

The ESJ Strategic Plan directs agencies to *Invest in Community Partnerships* to advance equity by ensuring that those most negatively affected by inequities have the right to define decisions and shape programming, service delivery, policies and budgeting, while receiving equitable compensation for their engagement. Metro worked closely with community partners and people with lived experience to understand community context, how best to reach this population, and how to refine the program so it serves people with the greatest needs.⁴ Engagement with partners and customers on different program approaches resulted in the following high-level context about community need and outcomes:

- The new program's theory of change is that if program participants receive a fully subsidized fare, then they will have increased mobility, which could lead to better access to other determinants of equity, including healthcare, social services, and employment, and overall improvements in health and well-being. The action itself – providing a transit pass to people who cannot afford one – is a downstream action. However, by providing people the opportunity to access necessary services and employment may begin to address the underlying conditions across generations. Metro hopes that improved access to transportation is a first step towards how we can collectively address underlying issues and have more upstream impacts.
- For some people, the cost of riding transit is major barrier, although it is not the only barrier; for some, access and accessibility of the transit network is of higher concern. This program seeks to address affordability, but community partners and customers were clear that Metro must balance fare discounts with investments in service.

¹ For example, a family of four with earnings at 50% of the federal poverty level would need to spend 20% of their income purchasing ORCA cards, while a family of four at 250% of federal poverty income level would spend 5% of their income on transit.

² White and Asian households are overrepresented at higher income levels, and the gap in household income between White and Black households is among the largest, [according to recent analysis from King County's Office of Economic and Financial Analysis](#).

³ See Existing Conditions report for additional information and citations.

⁴ A full description of this effort, including demographics of the people who participated, is included in the income-based fares Public Engagement Report.



King County



King County Equity Impact Review (EIR) Process

Phase 3: Analysis and Decision Process

Brief Summary of Findings/Recommendations from Metro's Use of the EIR

In order to determine the level of subsidy (full or partial) and the income threshold, Metro applied iterative co-design, analysis and decisions with multiple entities: community partners, stakeholders, and Metro leadership and employees. That work led to the following recommendations about how the program could operate and further the ESJ Strategic Plan direction of *Invest Upstream and Where Needs Are Greatest*:

- The proviso requested that Metro consider using Medicaid eligibility, or $\leq 138\%$ of federal poverty. It was determined that setting the income eligibility at this level would not focus resources where needs are the greatest. With a large eligible population at this level (261,000 residents, or 13% of the county population), demand would overwhelm partner human service agencies and put investments in other priorities at risk.
- The proviso also requested that Metro have low barrier enrollment and be coordinated with human service provider agencies in order to streamline participants' access to a range of income-based services. Community partners and stakeholders also prioritized these elements. In the proposed program, eligible customers would receive the transit benefit as they enroll in other services.
- An income threshold was identified with similarly simple verification: aligning with six major state benefit programs, $\leq 80\%$ of federal poverty would have this feature. People with incomes at this level are unlikely to afford any fare, so introducing a full fare subsidy for them was determined as a reasonable place to start.
- While these six state programs are a starting point, expansion to serve individuals who do not receive state services is a necessary element of the program.
- A partially subsidized option (e.g. something that is not free to the customer) does not meet the needs of people with no- and very-low incomes, since they cannot afford any fare. While this was the most important consideration, it is also essential to note that the process for offering a partial subsidy in the current ORCA system would be very complicated and burdensome to the customer and human service agencies.
- Administering a program that is overly burdensome can have unintended consequences and create more inequities. The proposal is to shift administrative responsibility of the program for the ORCA cards from human service agencies to Metro, thereby removing the burden to human service agencies.



King County Equity Impact Review (EIR) Process

Phase 4: Implement. Are you staying connected with communities and employees?

Phase 3: Ongoing learning. Listen, adjust, and co-learn with communities and employees

Brief Summary of Findings/Recommendations from Metro's Use of the EIR

Transparent and Accountable Leadership from King County Council and Metro to communities most in need is critical to successful implementation, evaluation, and any future expansion of this newly proposed program. Throughout 2019, Metro's work encompassed Phases 1-3 of the EIR process. Currently (as of January 2020), Metro is starting implementation (Phase 4) and developing a plan to align with Phase 5. Metro will:

- Continue to engage with community partners and customers on program implementation, expansions, evaluation, and communication. Their experiences are integral to determining necessary system and process adjustments, particularly learning about who is and is not being served well by the program, and informing expansion priorities.
- Evaluate the process and make adjustments for better reach and efficiency.
- Determine who is not served by the program and develop an expansion effort to serve those communities. Include a call for partners for the expansion so organizations who may not be currently connected with transit efforts have the ability to participate and can receive funding for their efforts. This will be an important opportunity to ensure that the work remains equity-centered and that Metro is advancing equitable outcomes.
- Ensure the work remains outcomes-focused by including a rigorous impact evaluation with participatory evaluation, qualitative inquiry with customers and human service agency partners, and quantitative analysis.

