Draft Disproportionate Burden Policy

This policy establishes a threshold for determining whether a given action has a disproportionate burden on low-income populations.

Disproportionate Burden Threshold for Major Service Changes: For a proposed major service change that would affect existing service where an adverse effect has been identified (consistent with Metra’s definition of “adverse effect”), a disproportionate burden occurs when the absolute difference between the low-income population percentage of those adversely affected and the overall low-income population percentage is at least ten percent.

Disproportionate Burden Threshold for Fare Changes: For a proposed fare change to a single fare type only or for any proposed changes in fare media only, a disproportionate burden occurs when the absolute difference between the low-income population percentage of those adversely affected and the overall low-income population percentage is at least ten percent.

For proposed fare changes on two or more fare types, a disproportionate burden occurs when the absolute difference between the overall aggregate percentage fare change faced by low-income riders and the overall aggregate percentage fare change faced by non-low-income riders is at least five percent.

The following examples illustrate how the disproportionate burden thresholds could be applied:

Suppose under a proposed major service change, the group of riders adversely affected by the change is 18% low-income/82% non-low-income, and the overall system ridership is 10% low-income/90% non-low-income (as determined by the results of a rider survey).

With the disproportionate burden threshold set at 10%, the proposed service change in this scenario would not cause low-income riders to bear a disproportionate burden of the adverse effects of the proposed service change, as the low-income percentage of the group affected by the service change is 8% higher than the low-income percentage of all riders, or 2% under the disproportionate burden threshold.

Suppose under a proposed across-the-board fare increase, the overall aggregate fare increase for low-income riders is 9.8%, (weighted by ticket type as determined from rider survey results) and the overall aggregate fare increase for non-low-income riders is 4.6%.

With the disproportionate burden threshold for overall aggregate fare increases set at 5%, the proposed across-the-board fare increase in this scenario would cause low-income riders to bear a disproportionate burden of the fare increase, as the absolute difference between the overall fare increase faced by low-income riders and the overall fare increase faced by non-low-income riders is 5.2%, or 0.2% above the disproportionate burden threshold.