

HEARING DATE: March 2, 2021

BILL NO: HB1325

COMMITTEE: Environment and Transportation

POSITION: Letter of Information

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TITLE:

Food Insecurity Zones - State Legislative Districts - Reports

BILL ANALYSIS:

HB1325 requires the Department of Housing and Community Development (DHCD) and the Maryland Department of Planning (Planning) to jointly produce a report for each State Legislative District on the food environment in the district. Each report shall be in the same format and of the same detail as the City of Baltimore's State Legislative District 2018 Food Environment Briefs, produced by the Baltimore City Department of Planning and the Johns Hopkins Center for a Livable Future (CLF). The Legislative District reports are to be submitted to the General Assembly on or before December 1, 2021, and on or before December 1 every two years thereafter.

POSITION AND RATIONALE:

Planning does not have any experience, nor resources available, to comply with the requirements of this bill. To meet the requirements stipulated in HB 1325, Planning will need to replicate Baltimore City's *Food Environment: 2018 Report* statewide and produce the first series of legislative district reports by December 1, 2021. Since none of the data analysis outside of Baltimore City has been performed, it is highly unlikely any reports can be produced by the mandated deadline, which is in less than a year. To expedite the preparation of the food environment reports, several consultant contracts with state universities and nonprofits that specialize in equitable food access will need to be secured to conduct the Healthy Food Availability Index (HFAI) surveys of food retailers statewide. To meet an expedited production of the reports, it is estimated that \$400,000 will be needed the first year, and \$200,000 every year after to maintain the HFAI food retailer survey data.

To help identify the grocery and supermarkets and other food retailers in Maryland, Planning will need to subscribe to Data Axle's database to access its comprehensive listing of food businesses in Maryland. The annual cost of this subscription is estimated to be \$20,000.

To prepare an estimate of the work required to produce the reports, Planning contacted Baltimore City's Food Policy and Planning Division staff and the CLF investigators involved in the *Baltimore City's Food Environment: 2018 Report* to determine how data collection, analysis, and reporting at the Baltimore City level can be scaled to complete 47 state legislative reports every two years. Based on the interview of Baltimore City Planning and CLF, the amount of new data and analysis required to produce the reports will be significant, and it does not appear possible to meet the December 1, 2021 deadline with the report conditions mandated in HB 1325.

The following is a summary of the work that went into preparing *Baltimore City's Food Environment: 2018 Report* and an assessment of what would be required for statewide reports:

The analysis to determine Baltimore City's Healthy Food Priority Areas involves four factors:

1. Supply of Healthy Food (Data source: Johns Hopkins Center for a Livable Future, 2016)

Assessment of what would be required to apply this factor statewide: The data for this factor currently does not exist statewide and will be very difficult to replicate statewide. According to *Baltimore City's Food Environment: 2018 Report*, "871 food retail stores were physically visited and verified as open and operating across the city, including all 47 supermarkets." The CLF used the Healthy Food Availability Index (HFAI) tool to field survey 761 food retailers in 2016 and scored the presence of healthy foods. CLF's Healthy Food Availability Index (HFAI) tool is derived from the Nutrition Environment Measures Survey for Stores (NEMS – S), to measure and assess healthy foods in stores. The HFAI tool awards points to stores based on the presence of a market basket of basic staple food items, as well as whether there are healthy options available, including lean protein, whole wheat grains, low-fat dairy, and produce. Scores can range from 0 to 28.5, with a higher score indicating a greater presence of healthy foods.

CLF Program Officer reported that CLF used students to conduct surveys in 761 food retail stores, 626 of which were Supplemental Nutrition Assistance Program (SNAP) authorized retailers, with four students (two per team) working five days a week for three months to collect the data on the presence of a market basket of basic staple food items. Three CLF staff supervised the students and finished the data collection effort (not full time) over the course of an additional two to three months. Each food retail store visit required five to ten minutes to determine the availability of the 20 basic staple food items. The handwritten site visit survey forms were coded and keyed into a database, food retailer scores were determined based on the presence of healthy foods, and the store locations were geocoded for GIS analysis. Data collection, analysis, mapping, and final report preparation took

approximately 10 months to complete. It is likely subsequent updates of the City of Baltimore could be done in less time. But, again, there is no model of how to perform HFAI field surveys outside of Baltimore City. Since this study relied heavily on student interns and is part of an ongoing collaboration between CLF and the Baltimore City's Food Policy and Planning Division, a complete cost estimate for the study is not available.

Baltimore City's Food Policy and Planning Division took the data and analysis from CLF and prepared the State Legislative District Briefs. This part of the project was completed in about two months. While completion of the food environment report for Baltimore City took approximately one year the first time, CLF indicated preparing an updated report for Baltimore City should require less time.

It should be noted that Baltimore City started in 2012 working with CLF to examine the physical food environment in Baltimore City and to identify gaps and opportunities to improve healthy food access. Baltimore City's *Food Environment: 2018 Report* was an update of a 2015 report: Mapping Baltimore City's Food Environment. Baltimore City's Food Policy and Planning Division has continued to work with CLF on improving the methodology used to report on the City's food environment and is now also working with Morgan State University to better understand City residents' accessibility to healthy food options and how people value choice of stores when grocery shopping. While the Morgan State University study examined a different aspect of the food environment issue than CLF's work, the cost to conduct "Understanding Access to Grocery Stores in Food Deserts in Baltimore City" was \$60,000 and was funded by U.S. Department of Transportation.

To provide context and estimate the effort needed for a statewide food environment assessment, one or more consultant contracts would be needed (possibly working with local university researchers) to collect the HFAI scoring of food retailers. According to the SNAP Retailers Database (cbpp.org/snap-retailers-database#Maryland), Maryland had 3,511 retailers participating in SNAP in 2019, which is 5.6 times more SNAP retailers than just Baltimore City. Additionally, SNAP authorized dealers only accounted for 82% of the food retailers surveyed; meaning approximately 4,268 food retailers or more would need to be surveyed statewide.

If the HFAI survey methodology is unchanged, significant resources will have to be devoted to data collection and analysis on a continuous basis to provide 2-year updates of the State Legislative District Environmental Food Briefs for all 47 districts.

For the purposes of the HB 1325 fiscal note, it is estimated the first year \$400,000 will be needed to build the expedited HFIA food retailer survey infrastructure for the first year of legislative district reports and \$200,000 of contractual services thereafter. It is assumed that HFAI food retailer surveys would need to be ongoing continuously and could not be started up shortly before the publication of the legislative district reports

every two years. It is anticipated contractual services would be procured utilizing researchers from state universities and nonprofit organizations that specializes in equitable food access to conduct the HFAI surveys of food retailers statewide. The December 1, 2021 report deadline is not possible given the time it will take to procure the needed contractual services and scale up the HFAI food retailer surveys statewide.

2. Household Income (Data source: 2015–2019 Multi-Year American Community Survey 5-year Estimates)

Assessment of what would be required to apply this factor statewide: This factor appears to be scalable statewide, as it uses the American Community Survey data reported by Planning's State Data Center. The cost of obtaining this data should be nominal.

3. Vehicle Availability (Data source: 2015–2019 Multi-Year American Community Survey 5-year Estimates)

Assessment of what would be required to apply this factor statewide: This factor appears to be scalable statewide, as it uses the American Community Survey data reported by Planning's State Data Center. The cost of obtaining this data should be nominal.

4. Distance to Supermarket (Data source: Baltimore City Health Department, 2016; USDA Food and Nutrition Services SNAP Retailer Locator, 2016; Johns Hopkins Center for a Livable Future, 2016)

Assessment of what would be required to apply this factor statewide: The data for this factor is not readily available, but there may be data sources that could be scalable statewide, especially if just SNAP Retailers are used (cbpp.org/snap-retailers-database#Maryland). Additionally, CLF's Maryland Food System Map potentially could be another data source. This mapping tool currently utilizes Maryland Food Stores 2017-2018 data, with a footnote stating "This list of Maryland food stores was compiled from two sources, ReferenceUSA and the USDA, and has been divided into four main store categories, Supermarkets, Small Grocery / Corner Stores, Convenience Stores, and Public Markets." CLF's data source is already dated and will need to be updated. **Planning does not maintain this data source and will need to subscribe to this data annually from Data Axle at a cost of \$20,000.**

Based on the four factors listed above, Baltimore City's 2018 Food Environment Report defines "A Healthy Food Priority Area" as an area where:

- The average HFAI score for all food stores is low (0-9.5). *[The average HFAI is determined by averaging the HFAs for all food stores within a Census Block Group.]*
- The median household income is at or below 185% of the Federal Poverty Level,
- Over 30% of households have no vehicle available, and

- The distance to a supermarket is more than a quarter of a mile.

These criteria may be applicable to Baltimore City, but are likely not appropriate for all parts of Maryland. Additional research will be needed to customize the criteria to different regions, as well as rural versus urban settings.

Thank you for your consideration of the above. Please do not hesitate to contact me if you have any questions or concerns.