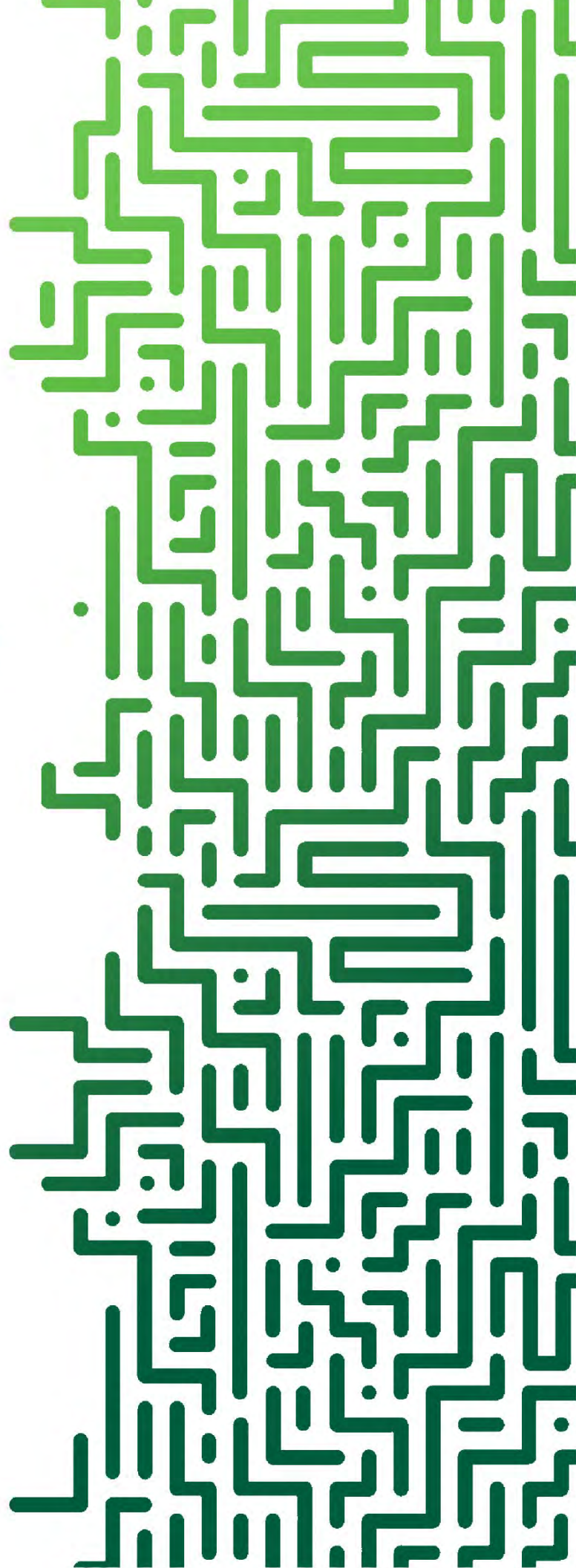




Commission Meeting Materials

November 7, 2024

NoVaTransit.org | @NoVaTransit
2300 Wilson Boulevard, Suite 230
Arlington, VA 22201
(703) 524-3322





Meeting Overview

NVTC’s November 7, 2024 meeting is an all-virtual meeting and can be viewed via the [NVTC YouTube Link](#).

Action Items

- 2025 Meeting Schedule
- RFP for Creative Services
- RFP for Technical Support to NVTC for Analysis Related to the SJ 28 Joint Subcommittee

Other Meeting Highlights

- NVTC Work Towards Long-Term Sustainable Dedicated Funding
- 2024 Annual Report on the Performance and Condition of WMATA
- Proposed 2025 NVTC Legislative Agenda
- Envision Route 7 BRT Strategic Implementation Plan + 4-2 Mobility Study
- Proposed VRE 2025 Legislative Agenda
- Reports from NVTC Committee Chairs, Virginia WMATA Board Members, VRE CEO, DRPT Director and NVTC Executive Director
- Closed Session: Executive Director Annual Performance Review

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**NVTC COMMISSION MEETING
THURSDAY, NOVEMBER 7, 2024
Via Electronic Participation
[Public Streaming Via YouTube](#)
7:00 p.m.**

AGENDA

6:00 p.m. Executive Committee Meeting – ([public streaming](#))

7:00 p.m. Commission Meeting – ([public streaming](#))

*These meetings are ALL-VIRTUAL public meetings as permitted under the Virginia Freedom of Information Act and NVTC's Electronic Participation Policy. The meetings may be viewed via the [NVTC YouTube Link](#). If the meeting method is changed, NVTC will provide a new meeting notice in accordance with the provisions of the Freedom of Information Act, and will notify Commissioners, staff and public at least 72 hours in advance of the meeting. **If the livestream transmission fails, please contact NVTC staff via email at support@novatransit.org, which will be monitored during the meeting.***

*NVTC is receiving general written public comment. **The deadline for written general public comments is 3:00 p.m., Thursday, November 7, 2024 via [NVTC's website](#).** Comments will be provided to Commissioners prior to the November 7 meeting.*

1. Opening Remarks
 - General Public Comments Received
2. **ACTION: Approve the Minutes of the October 3, 2024 NVTC Meeting**
3. **ACTION: Approve the Consent Agenda (subject to approval of the chair)**
 - A. **Approve the 2025 Meeting Schedule**
 - B. **Authorize the Executive Director to Issue a Request for Proposals for Creative Services**
4. Washington Metropolitan Area Transit Authority (WMATA)
 - A. Virginia WMATA Board Members Report

5. **Report from the Chairs of the WMATA Committee/Legislative and Policy Committee**
 - A. NVTC 2024 Annual Report on the Performance and Condition of WMATA
 - B. NVTC Work Towards Long-Term Sustainable Dedicated Funding
 - SJ 28 Joint Subcommittee to Study Growing Transit Needs in Northern Virginia
 - *DMVMoves*
 - C. **ACTION: Authorize the Executive Director to Issue a Request for Proposals via the DRPT General Planning Contract to Provide Technical Support to NVTC for Analysis Related to the SJ 28 Joint Subcommittee and to Execute the Associated Contract**
 - D. Draft 2025 NVTC Legislative and Policy Agenda
 - E. Joint NVTC-PRTC-VRE Legislative Forum

6. Report from the Chair of the Program Advisory Committee
 - A. Envision Route 7 BRT Strategic Implementation Plan
 - B. Envision Route 7 BRT Phase 4-2 Mobility Study

7. Virginia Railway Express (VRE)
 - A. VRE CEO Report and Minutes
 - B. Draft VRE 2025 Legislative Agenda

8. Department of Rail and Public Transportation (DRPT)

9. Executive Director Report
 - A. Executive Director Newsletter
 - B. NVTC Financial Reports

10. Closed Session

MINUTES
NVTC COMMISSION MEETING –OCTOBER 3, 2024
FIRST FLOOR LARGE CONFERENCE ROOM – 2300 WILSON BLVD.
ARLINGTON, VIRGINIA

The meeting of the Northern Virginia Transportation Commission was called to order by Chair de Ferranti at 7:05 p.m.

Members Present

Canek Aguirre (*via electronic participation*)

Walter Alcorn

Sarah Bagley

James Bierman, Jr.

Juli Briskman

Matt de Ferranti

Adam Ebbin

Libby Garvey

Takis Karantonis

Matt Letourneau

Saddam Azlan Salim

Mark Sickles

Paul Smedberg

David Snyder

Daniel Storck

Zach Trogden (Alternate, Commonwealth of Virginia) (*via electronic participation*)

James Walkinshaw

Members Absent

Paul Krizek

Alfonso Lopez

Dalia Palchik

Catherine Read

David Reid

Staff Present

Kate Mattice, Executive Director

Mirna Armanious

Monique Blyther

Andrew D’huyvetter

Matt Friedman

Allan Fye

Rhonda Gilchrest

Adam Hager

Xavier Harmony

Scott Kalkwarf

Ann McGrane

Tenley O’Hara

Vikram Sinha

Sophie Spiliotopoulos

Colie Touzel

Melissa Walker

Aimee Perron Seibert (*via electronic participation*)

Rich Dalton (VRE)

Steve MacIsaac (VRE)

Joe Swartz (VRE)

Michelle Zamarin (WMATA)

Mary Hynes

Opening Remarks

Chair de Ferranti welcomed everyone to the October 3, 2024 NVTC meeting and noted that the meeting is being livestreamed for the public on YouTube. He gave a special welcome to former NVTC Commissioner and Commonwealth Transportation Board member Mary Hynes and WMATA Inspector General Michelle Zamarin.

Board Administrator Rhonda Gilchrest confirmed an in-person quorum. Chair de Ferranti stated that Mr. Aguirre requested electronic participation for a personal reason as he is out of state on travel. Mr. Trogdon requested electronic participation as he lives over 60 miles from the meeting location in James City County, Virginia.

Ms. Briskman moved, with a second by Mr. Karantonis, to approve Mr. Aguirre's and Mr. Trogdon's requests for electronic participation. The vote in favor was cast by Commissioners Alcorn, Bagley, Bierman, Briskman, de Ferranti, Ebbin, Garvey, Karantonis, Letourneau, Salim, Sickles, Smedberg, Snyder and Storck. (Mr. Aguirre and Mr. Trogdon did not participate in the vote.)

Ms. Mattice stated that NVTC received no general public comments this month.

Chair de Ferranti suggested that with a full agenda, the Commission do block votes for Commuter Choice and VRE actions. There were no objections.

Minutes of the July 18, 2024 Meeting

Chair de Ferranti noted that he found a typographical error in the minutes with the timing of the Closed Session, which was fixed by the board administrator.

Mr. Sickles moved, with a second by Mr. Alcorn, to approve the amended July 18, 2024 meeting minutes. The vote in favor of the motion was cast by Commissioners Alcorn, Bagley, Bierman, Briskman, de Ferranti, Ebbin, Garvey, Karantonis, Letourneau, Salim, Sickles, Smedberg, Snyder and Storck. A roll call vote followed for Commissioners participating electronically and Mr. Aguirre voted in the affirmative. The motion passed.

Consent Agenda

Chair de Ferranti stated that the Consent Agenda includes two action items:

- A. Approve the Notice of Direct Contributions to the Jurisdictions
- B. Accept the NVTC Regional Bus Analysis Report

Ms. Garvey moved, with a second by Ms. Bagley, to approve the Consent Agenda. The vote in favor of the motion was cast by Commissioners Alcorn, Bagley, Bierman, Briskman, de Ferranti, Ebbin, Garvey, Karantonis, Letourneau, Salim, Sickles, Smedberg, Snyder and Storck. A roll call

vote followed for Commissioners participating electronically and Mr. Aguirre voted in the affirmative. The motion passed.

Resolution of Commendation for the Honorable Mary Hynes

Chair de Ferranti stated that the Commission is honoring former Commonwealth Transportation Board (CTB) member and former NVTC Commissioner Mary Hynes for her years of service to the region and the Commonwealth. Her tenure on the CTB concluded at the end of June. She has dedicated 30 years of work on public policy and transportation issues during her tenure at NVTC, the Arlington County Board, the Northern Virginia Transportation Authority and the Commonwealth Transportation Board (CTB). On behalf of the entire Commission, the chair thanked Ms. Hynes, who has been a mentor to him.

Mr. Ebbin moved, with a second by Mr. Karantonis, to approve the Resolution of Commendation honoring Mary Hynes for her 30 years of dedicated service.

Mr. Karantonis stated that the region was lucky to have Ms. Hynes serve on the Commonwealth Transportation Board as she made things happen, especially getting this region's transit funding needs heard.

Mr. Walkinshaw arrived at 7:12 p.m. and joined the discussion.

Mr. Snyder stated that he was always impressed with Mary and even with how busy she was, she always had time to listen, to inform and to ask questions. She was a major force in shaping the region's transportation and governance systems over the years. She always stood for the highest values in public service. He stated that it has been an honor to work with her.

Mr. Letourneau stated that it was a pleasure to serve with Mary Hynes on NVTC. On behalf of WMATA, he thanked her for her support of Metro. Her contributions to WMATA go way back as she served on the WMATA Board. Mr. Smedberg agreed and stated her work on the WMATA Board helped to build an important voice for Northern Virginia. She will be missed.

Ms. Hynes thanked the Commission and stated that she has had a great run. For all the organizations she represented, she must recognize their amazing staff. Transit is really important, and she thanked the Commissioners for the work they've done and continue to do for the region. She noted that the new members of the Commonwealth Transportation Board do not have connections to the Northern Virginia region. It's not their fault, but they don't understand the challenges this region has. She stated that Northern Virginia has an obligation to educate them about transportation issues in this region, and how all the layers fit together and how Northern Virginia delivers to other parts of the state. She suggested conducting a transit tour to bring them to this region to see firsthand the challenges. She implored NVTC to reach out to the new Commonwealth Transportation Board members.

Chair de Ferranti thanked Ms. Hynes for her words. He asked staff to follow up on her suggestions.

The Commission then voted on the resolution. The vote in favor was cast by Commissioners Alcorn, Bagley, Bierman, Briskman, de Ferranti, Ebbin, Garvey, Karantonis, Letourneau, Salim, Sickles, Smedberg, Snyder, Storck and Walkinshaw. A roll call vote followed for Commissioners participating electronically and Mr. Aguirre voted in the affirmative. The motion passed. Chair de Ferranti presented Ms. Hynes with a copy of the resolution. (A copy of the resolution is attached.)

Washington Metropolitan Area Transit Authority (WMATA)

Chair de Ferranti asked Mr. Smedberg to introduce WMATA's new Inspector General.

Introduction of WMATA Inspector General. Mr. Smedberg introduced WMATA Inspector General Michelle Zamarin, who is a distinguished attorney and prosecutor. Ms. Zamarin served as Litigation Counsel in the Trial Unit of the Enforcement Division at the Securities and Exchange Commission (SEC). Prior to that, she had a nearly 20-year career at the United States Attorney's Office, serving as its Chief of the Capitol Siege, Assault and Breach Section. In this role, she supervised 80-100 attorneys, including seven deputy chiefs. Her previous leadership roles at the US Attorney's Office included Deputy Chief of the Fraud and Public Corruption Section and Chief of the Federal Major Crimes Section. Ms. Zamarin holds a Juris Doctor, *cum laude*, from the Boston University School of Law, and a Bachelor of Arts from Franklin and Marshall College. Ms. Zamarin is a member of the bars in the State of New York and the District of Columbia. Mr. Smedberg noted that Ms. Zamarin has already made meaningful impacts at WMATA in the months she has been here.

Ms. Zamarin thanked the Commission for inviting her to attend this meeting. She has been a life-long resident of the region and understands the importance of transit. She started her Inspector General role in June. She explained that the mission of the Office of Inspector General (OIG) is to independently seek out waste, fraud and abuse. She was able to be involved with finalizing the Audit Plan, which is currently available to view as part of the public process. It is a powerful tool. She provided some background information about the OIG office, including its independence in hiring and contracting, as well as with the OIG budget. She noted that she has had one-on-one conversations with every member of the OIG team and did not hear anyone say that the WMATA Board had been intrusive in any way. Her team cares about WMATA and believes that they are making a difference.

Ms. Zamarin offered for her and her team to meet with Commissioners to review the Audit Plan or in the future to discuss things that should be audited. Mr. Alcorn expressed his appreciation for her offer and he suggested that it may be helpful for her to meet with the NVTC WMATA Committee sometime in the future.

In response to a question from Mr. Storck about performance auditing, Ms. Zamarin explained that the work of the OIG is broken down into three parts, including looking at contracts before they are finalized, an evaluations team, and a performance group which conducts performance audits. She has a very talented audit group of 20 people. The first performance audit under her leadership is on contract modifications, which will be released soon.

Chair de Ferranti thanked Ms. Zamarin for meeting with the Commission.

Report from the WMATA Board Members. Mr. Smedberg reported that earlier this month, the WMATA Board approved two agreements for more Metrobus service in DC. The actions continue the 24-hour bus service in DC and add additional bus service to compensate for the cancellation of the DC circulator service. DC is entirely funding the services. He also reported that the WMATA Board received the FY 2024 service excellence report. The report highlights increasing ridership, a reduction in crime, and reductions in fare evasion on Metrorail.

Mr. Letourneau reported that WMATA closed the fiscal year budget with a budget favorability of \$28.4 million. Despite lower-than-expected passenger revenues, WMATA achieved significant cost savings through a hiring freeze, vacancy management, and alternative paratransit service providers. As he discussed in past meetings, the WMATA Board is looking at a financial reserve concept. Due to some concerns from Maryland and Virginia, a reserve is not currently on the Board's agenda. He noted that WMATA is the only transit system of its size without any kind of reserve. WMATA will continue to work through the issues and concerns.

Mr. Letourneau also reported that in September WMATA completed the installation of new faregates in all Metrorail stations. These gates have resulted in an 82% drop in fare evasion on Metrorail. In addition, WMATA has replaced 1,500 fareboxes on all buses in the fleet. However, WMATA is still having fare evasion issues on Metrobus. Mr. Letourneau reviewed some of the initiatives to address these issues.

Mr. Letourneau also announced that there will be minor track work in Virginia this weekend resulting in 15-minute headways on short portions of the Blue, Orange, Silver and Yellow Lines. Mr. Smedberg also noted that there will be a major shutdown between Christmas and New Years at some stations in the District of Columbia. Mr. Letourneau gave an update about the collective bargaining agreement.

In response to a question from Mr. Storck, Mr. Letourneau provided more information about fare evasion and WMATA's best practices. The goal is to collect 100% of fares. Chair de Ferranti noted that there could be more information available as time goes on. Mr. Alcorn stated that he hopes WMATA can institute the right incentives to bring bus fare evasion down. Mr. Letourneau stated more information will be forthcoming on the new formula. One component of that formula is paid ridership, which is an incentive to make sure riders are paying. Mr. Karantonis stated his concern with multiple door boarding issues as it relates to fare evasion.

Report from the Chairs of the WMATA Committee and the Legislative and Policy Committee

WMATA Committee Chair Walter Alcorn reported that the WMATA Committee and the Legislative and Policy Committee met for a joint meeting on September 19. At that meeting, the committees heard a summary of how operating budgets at peer transit agencies to WMATA are funded and what type of dedicated funding revenue sources they have. WMATA is unique in not having dedicated operating funding, and all peers examined by staff use a sales tax. There is a lot of variation in sales tax rates and structures for revenues, often with an intermediary organization playing a role in the funding. While there is no one-size-fits-all solution, the staff work offers a roadmap in establishing new dedicated funding for all transit agencies in Northern Virginia.

Mr. Alcorn reported that the joint committee also received an update from NVTC staff on regional fare policy and technology. There's a lot of existing success that can be built upon as a region, namely that every local bus operator in Northern Virginia that charges fares uses SmarTrip and matches WMATA's fares and transfer policies, creating a seamless customer experience. The next major step in fare policy and fare technology requires WMATA to move to open payments, where customers can use options like contactless credit cards to pay their fare. He shared the good news that at a recent WMATA Board meeting, the general manager announced that they hope to have this type of open payment system in place by 2025. Lastly, the joint committee reviewed NVTC staff's proposed recommendations for the 2024 Report on the Performance and Condition of WMATA. This year's recommendations mirror last year's recommendations, which call for WMATA to continue efforts in finding cost savings and for the region to find dedicated funding solutions.

Ms. Mattice then reviewed the various work NVTC is doing to support finding a long-term, sustainable, dedicated funding solution for the region. September was a busy month with numerous task forces, working groups and studies. The most recent of these meetings was the DMVMoves Task Force, which met on September 23 and includes NVTC Commissioners Sickles, Smedberg, and de Ferranti. The SJ 28 Joint Subcommittee on Northern Virginia's Growing Needs of Public Transit met on September 26. She serves on the subcommittee along with NVTC Commissioners Sickles, Ebbin, Alcorn and Smedberg. These efforts are all critical to developing a regional solution to ensure a solid future for WMATA as well as the other local transit systems including VRE. While DMVMoves is focused on the greater Washington, DC region, the SJ 28 Subcommittee is doing a deeper dive on the Virginia side of both funding and cost containment priorities.

Mr. Ebbin, who serves as the chair of the SJ28 Joint Subcommittee, reported that the second meeting of the Joint Subcommittee on September 26 included presentations from NVTC, PRTC, VRE and WMATA to get a better understanding of their operating and capital needs over the next 10 years. All agencies are facing fiscal challenges, but with differences in the scale and timing of the need. The needs information provided by WMATA was the same information conveyed at DMVMoves – showing the close coordination between these efforts. WMATA also talked about their progress in reducing fare evasion on Metrorail, ridership growth and management of expense growth. NVTC staff also presented their peer funding research as well as an overview of Virginia's 3% cap on WMATA's operating subsidy growth, which is something that will be looked at by the Technical Working Group.

Mr. Ebbin also noted that Deputy Secretary Sargent gave a presentation on financial and performance trends for WMATA and the region's transit systems. Some of the information in the report relies on currently available but soon to be updated data. The Joint Subcommittee had a robust discussion on how to appropriately contextualize the information and the fact that transit is in a new place post-pandemic and how to move forward. The next meeting of the Joint Subcommittee is on October 17 hosted at NVTC's offices. He thanked Allan Fye and his team for providing helpful presentations.

Mr. Fye, who is the chair of the SJ28 Technical Working Group, reported that the working group had its first meeting, with lots of thoughtful and constructive feedback and various points of view to consider as the working group continues. Several themes emerged:

- Concern about the cost of living in Northern Virginia, recent reports about population loss, and the area's ability to compete with other regions – how to reconcile these concerns with the discussion about needing to fund transit and engage with the business community?
- As we talk funding, ensure we don't take funding from existing transportation partners.
- Transit and overall travel patterns are very different post-pandemic, and we have to adapt our transit funding models to the new transit reality.
- There is a lot to learn from our transit peers across the country – things to do and things not to do.
- Understanding the complexity of transit funding in Northern Virginia and Virginia, including the important role the state plays in investing in transit.
- Continue to work with our regional partners to define the transit needs in Virginia and ensure all stakeholders understand that defining the needs is an iterative process.

Mr. Fye stated that the Technical Working Group will reconvene to dive into NVTC's recent analysis about potential funding sources (local, regional and statewide), the importance of land use to support transit ridership growth and examining the different costs between Northern Virginia and the rest of the state. He also noted that NVTC continues to work closely with WMATA and MWCOC staff on the DMVMoves effort, which covers many of these same topics but for the entire DC metropolitan area. NVTC is working behind the scenes to ensure that these two efforts build off each other.

Mr. Sickles, who is a member of the DMVMoves Task Force, reported that at its last meeting, the Task Force focused on how to make transit across the region better and at what cost. Staff provided an overview of the total capital and operating transit needs in the region, including WMATA, under two different scenarios. The first scenario is an existing level of service and a baseline state of good repair needs – basically what is in place today - and the second scenario allows for additional state of good repair needs and limited service improvements. These scenarios create a potential FY 2028 total funding gap across the entire DC region ranging from \$645 million to \$835 million. He noted that these scenarios assume the additional subsidy provided by the region to WMATA in FY 2025 is ongoing. While the state is working hard this year to secure additional state aid in the two-year budget, there should be no assumption that this funding from the General Fund is ongoing. Finally achieving dedicated funding for WMATA, which must be a partnership between the state and NVTC jurisdictions, is a must to continue WMATA's growth as well as the success of the local transit agencies.

Chair de Ferranti stated that from the local perspective – and this was echoed by Fairfax County Board Chair Jeff McKay during the Task Force meeting – it is important that any new revenues fund all the transit systems, not just WMATA, and that new revenues help relieve the pressure that currently falls on local general funds to pay for WMATA and local transit. Northern Virginia cannot continue to rely so heavily on local property taxes to fund transit. Chair de Ferranti reiterated NVTC's funding principles for long-term, sustainable transit funding, which are:

- A one-size-fits-all approach doesn't work in the region's funding context.
- Virginia, Maryland and DC should each develop their own funding solution and should include an inflation factor.

- Maintain the 50/50 funding partnership between Northern Virginia jurisdictions and the Commonwealth.
- Ensure there are sufficient state and local resources to sustain the rebaselined FY 2026 funding levels at WMATA.

Chair de Ferranti thanked NVTC staff for keeping the Commission informed and up to date on all the work going on right now. NVTC's coordination and research and analysis efforts are vital to achieving long-term, sustainable dedicated for all the transit systems in Northern Virginia.

Mr. Bierman asked the hard question about what an actual dedicated funding stream would look like. He asked about what types of things are on the table for discussion. Chair de Ferranti stated that there are DMVMoves slides that show revenue that could come from a sales tax and there has been discussion about a fuels tax or recording tax. Politically it is complex with the three jurisdictions (Maryland, Virginia and DC). Mr. Smedberg stated that a lot of work is going on and he agreed it is complex. Mr. Sickles stated that there will be a gray area for a while, but he is confident that Virginia will figure out how to pay for Virginia's share. He personally does not want it to land on the shoulders of property owners through an increase in personal property tax. Mr. Bierman stated that he wasn't asking for an answer at this meeting, but his point stands that more concrete conversations would be helpful, because eventually any future revenue options will need to be sold to the public. Chair de Ferranti thanked Mr. Bierman for his question. Mr. Alcorn stated that the role of NVTC staff compiling options is still coming together. There also needs to be a discussion about cost control. Chair de Ferranti suggested that it might be beneficial to touch base with the chair of DMVMoves. Mr. Smedberg stated that he, Mr. Letourneau and WMATA General Manager Randy Clarke met with Governor Youngkin and Secretary Miller, and it was a very constructive discussion. Mr. Letourneau stated that the new NTD data will be available soon to provide more context on Metro performance.

Ms. Mattice reported that when the Legislative and Policy Committee met in a joint meeting with the WMATA Committee on September 19, the committees received a staff briefing on the development of NVTC's 2025 Federal and State Legislative Agenda. NVTC staff, in conjunction with the Legislative and Policy Committee, are developing the 2025 Federal and State Legislative Agenda for the next Virginia legislative session that begins in January. The current draft of the NVTC 2025 Agenda is largely similar to last year's with a few modifications:

- State: focus is protecting and preserving funding for transit; new item is continuing to work with state agencies to streamline bus infrastructure projects, mainly bus shelter construction.
- Federal: focus on advocating for authorized levels of transit investment re: IJJA and supporting our local agencies' ability to leverage federal funding; new item acknowledges the concerns the entire transit industry has re: bus manufacturer consolidation – national issue with local impacts.

NVTC is also working with its colleagues across the Commonwealth – through the Virginia Transit Association – and across the country – through the American Public Transportation Association – on other issues that may be relevant to address in 2025.

Mr. Smedberg left the meeting at 8:35 p.m. and did not return.

On November 7, the draft Legislative Agenda will be brought to the full Commission for review and feedback, and the Commission will be asked to approve the 2025 State and Federal Agenda at its December 5 meeting.

Ms. Mattice also announced the upcoming NVTC-PRTC-VRE Joint Legislative Forum on Friday, December 13 at George Mason University's Arlington Campus Schar School. It is expected that the agenda will focus on DMVMoves and SJ 28 priorities.

Report from the Chair of the Program Advisory Committee

Chair de Ferranti noted that Program Advisory Committee Chair Dalia Palchik was unable to attend and he asked Director of Program and Policy Allan Fye to give the report. Mr. Fye reported that the Program Advisory Committee (PAC) met with the Joint Commission Working Group (JCWG) on September 19 to receive an update on the Commuter Choice program. The JCWG consists of three members from NVTC and three members from PRTC, as the I-395/95 Commuter Choice program operates as a partnership between the two Commissions. The PAC and JCWG were briefed on the development of the FY 2024 Commuter Choice Annual Report as well as the upcoming FY 2026-2027 I-395/95 Commuter Choice Call for Projects. The PAC also received an update on zero-emission buses in the region.

Mr. Fye explained that there are two actions being requested: to 1) Authorize the Executive Director to Submit the NVTC Commuter Choice FY 2024 Annual Report to the Commonwealth Transportation Board; and 2) Authorize the Executive Director to Issue the I-395/95 Commuter Choice Call for Projects for FY 2026 – 2027. These two actions will be done by a block vote.

Mr. Fye provided a quick refresher on the Commuter Choice program. Regarding the annual report action, he provided a few takeaways from this year's report. As in past years, the report highlights the cumulative benefits of projects funded to date under the program – including, this spring, the highest daily ridership among active projects of 7,500 weekday trips. To date, the Commuter Choice projects have supported nearly seven million trips and supported significant travel time and fuel cost savings for commuters, among other quality of life and environmental benefits (including a 71% GHG emissions reduction relative to drive-alone travel). Mr. Fye noted that as Ms. Hynes mentioned earlier, there are several new and incoming members on the CTB, so this year's annual report provides some context on how Commuter Choice supports the region's economic growth and resilience, provides commuters with faster travel along congested corridors, supports demands for more travel options and reinvests toll revenue where it's earned, right here in Northern Virginia.

Mr. Fye stated that since the program's inception, Commuter Choice has invested \$66 million in the I-66 corridor savings commuters \$38 million in fuel expenses and travel time, and in the I-395/95 corridor, \$90 million has been invested resulting in \$27 million worth of fuel expenses and travel time savings.

Mr. Fye provided more information about the next call for projects in the I-395/95 corridor for FY 2026-2027 funding. Staff expect \$25-30 million available over the two years for new projects. This amount accounts for an off-the-top \$10 million award to complete the Commissions' and CTB's total commitment of \$20 million for a bus rapid transit project in Fairfax County that was made as part of the prior Program of Projects. Staff expect substantial demand for the funds, including several successful transit service improvements that may return for continued operating support and further anticipated capital proposals. This may lead to some challenging programming decisions for the Commissions. Ultimately the funding is competitive, and NVTC wants to fund the most effective projects. NVTC staff discussed project ideas and policy considerations with eligible applicants over the summer and are offering an additional round of workshops later this month.

Mr. Fye stated that staff are not bringing forward any policy updates, although there is one refinement worth mentioning – clarifying that for projects that improve pedestrian and bicycle access to transit, that these specifically must link directly to a Metro or VRE station or one of several identified regional bus hubs with frequent all-day service, to maximize the likelihood of substantive impacts to peak-period corridor travel.

Mr. Fye explained that following NVTC and PRTC approval, the call for projects will be opened and the application portal will go live October 4 and run through December 16. Staff will then let applicants know of any ineligible applications by late January or early February and will present the results to the Commissions in March. By early to mid-April, staff expect to have a scored set of eligible proposed projects, which will be followed by a one-month public comment period. The JCWG will be reconvened to endorse a draft Program of Projects for the full Commissions approval. In June, the Commissions would adopt the Program of Projects and refer it to the CTB for final approval into the Six-Year Improvement Program.

Ms. Bagley moved, with a second by Mr. Smedberg, to approve the two Commuter Choice actions as block vote:

- Authorize the Executive Director to Submit the NVTC Commuter Choice FY 2024 Annual Report to the Commonwealth Transportation Board
- Authorize the Executive Director to Issue the I-395/95 Commuter Choice Call for Projects for FY 2026 – 2027

The vote in favor was cast by Commissioners Alcorn, Bagley, Bierman, Briskman, de Ferranti, Ebbin, Garvey, Karantonis, Letourneau, Salim, Sickles, Snyder, Storck and Walkinshaw. A roll call vote followed for Commissioners participating electronically and Mr. Aguirre voted in the affirmative. The motion passed.

Virginia Railway Express (VRE)

Chair de Ferranti asked VRE CEO Rich Dalton to give his report followed by VRE Operations Board Vice-Chair Bagley to present the action items prior to the block vote.

VRE CEO Report. Mr. Dalton encouraged Commissioners to read his written CEO Report.

VRE Electronic Participation Policy. Ms. Bagley stated that the VRE Operations Board recommends Commission approval of Resolution #2540, which will approve the amended VRE Operations Board Electronic Participation Policy. Updates to the policy are necessary to reflect recent changes to the Virginia Code's Freedom of Information Act as a result of legislation passed in the 2024 General Assembly Session and signed into law by the governor. The amended policy was approved by the VRE Operations Board, which must be followed by approval by NVTC and PRTC.

Lease Agreement for Parking at the VRE Broad Run Station. Ms. Bagley stated that the VRE Operations Board recommends Commission approval of Resolution #2541, which will authorize the VRE CEO to execute an amendment to the Lease Agreement with the Prince William County Board of Supervisors for real property used for parking at the VRE Broad Run Station to extend the Lease Agreement for 20 years at the cost of \$1 per year. The current agreement will expire in October 2024 and this amendment to the Lease Agreement will extend the term for an additional 20 years through October 2044, with all other provisions of the agreement unchanged.

Referral of the Preliminary FY 2026 VRE Operating and Capital Budgets to the Participating and Contributing Jurisdictions. Ms. Bagley stated that the VRE Operations Board recommends Commission approval of Resolution #2542, which will authorize the VRE CEO to refer the preliminary FY 2026 VRE Operating and Capital Budget to the jurisdictions for review and comment. A final balanced FY 2026 budget will be submitted in December for the Operations Board's consideration and referral to the Commissions for approval in January 2025.

VRE Chief Financial Officer Mark Schofield provided more details on the preliminary FY 2026 VRE operating and capital budgets. The preliminary operating budget is \$117 million, which is down about \$1 million from the current budget. The preliminary operating budget includes a total jurisdictional subsidy of \$19.8 million (an increase of 8%) and no proposed changes to passenger fares following the FY 2025 fare increase. Approximately \$39.3 million of pandemic relief funding (from the American Rescue Plan Act) is projected to be utilized in the preliminary FY 2026 operating budget. VRE's preliminary FY 2026 capital budget includes commitments of \$73.5 million from federal, state, regional and local funding sources towards the Capital Improvement Program (CIP). VRE plans to maintain the current level of weekday trains and to add Saturday service starting early in 2025. VRE staff will continue to pare down the budget and look for ways to defer or cut costs. The VRE budget will be brought back to the Commissions for approval in January.

Mr. Alcorn asked when the Commissions will see a plan about what happens after the pandemic relief funding runs out. Mr. Schofield stated that this is being worked on currently in the SJ 28 discussions. Chair de Ferranti suggested that a plan is needed within 12 months.

Operating Access Agreement with the Norfolk Southern Railway for Track Access and Dispatching. Ms. Bagley reported that the VRE Operations Board recommends Commission approval of Resolution #2543, which will authorize the VRE CEO to execute an operating access agreement with Norfolk Southern Railway for track access and dispatching. VRE currently has an Operating Access Agreement with Norfolk Southern related to VRE operations on the Manassas

Line. The original 1989 agreement has had many amendments and extensions over the years. VRE and Norfolk Southern staff have been in discussions since the latest agreement in 2023 to negotiate a long-term agreement. The current extension expires on October 10, 2024. The new agreement is for a term of 20 years, which will expire in 2044 (with opportunity to renew upon prior notification to Norfolk Southern).

Ms. Bagley explained that with Virginia Passenger Rail Authority's recent purchase of approximately 24 miles of the Manassas Line corridor from Norfolk Southern, VRE still needs an access agreement with Norfolk Southern since VRE will continue to operate on segments of the corridor retained by Norfolk Southern. Norfolk Southern will also provide dispatching for VRE trains.

Mr. Dalton explained that the Norfolk Southern operating access fees were projected to more than double, but with this agreement and the 20-year term, VRE will be paying a flat fee of \$750,000 annually for these services. There is also the potential to reduce this amount.

Mr. Storck moved, with a second by Ms. Bagley, to approve the following four actions as a block vote:

- Approve Resolution #2540: Approve the Amended VRE Operations Board Electronic Participation Policy
- Approve Resolution #2541: Approve and Authorize the VRE CEO to Amend the Lease Agreement for Parking at the VRE Broad Run Station
- Approve Resolution #2542: Authorize the Referral of the Preliminary FY 2026 VRE Operating and Capital Budgets to the Participating and Contributing Jurisdictions
- Approve Resolution #2543: Authorize the VRE CEO to Execute an Operating Access Agreement with the Norfolk Southern Railway for Track Access and Dispatching

The vote in favor was cast by Commissioners Alcorn, Bagley, Bierman, Briskman, de Ferranti, Ebbin, Garvey, Karantonis, Letourneau, Salim, Sickles, Snyder, Storck and Walkinshaw. A roll call vote followed for Commissioners participating electronically and Mr. Aguirre voted in the affirmative. The motion passed. (Copies of the resolutions are attached.)

Proposed Virginia Passenger Rail Authority (VPRA) Funding Agreement. Chair de Ferranti asked Mr. Dalton and Mr. Schofield to give their presentation on the proposed Virginia Passenger Rail Authority Funding Agreement, which will require action by the Commissions at a later date.

Mr. Dalton stated that a copy of the proposed agreement was provided in the meeting materials. Mr. Schofield reviewed the agreement, which will be brought back to the Commissions for approval as noted that VRE will come back multiple times with specific purchase agreements and as part of the budget process. The agreement has a commitment of \$155 million over five years, but the total appraisal is expected to exceed that amount. VRE is pursuing Federal Transit Administration (FTA) funding. The local match (minimum 20%) will be required for any federal funds; other non-federal sources may be needed for reasons of timing or if any components are determined not to be FTA-eligible. Potential sources include existing state and local funds on midday storage; CROC funds currently committed to L'Enfant; CROC PAYGO supporting

Transforming Rail in Virginia/Long Bridge; VPRA funds currently committed to access fee reimbursement; I-66 Outside the Beltway funds; and new funding streams (SJ 28, etc.).

Mr. Schofield stated that in addition to the benefit of having the Commonwealth and VRE control part of the Manassas Line, it is also a good deal because it provides a much better location where VRE can store mid-day trains in Alexandria and it will be much cheaper to operate the system. There will be a reduction of \$10 million in annual access fees and Virginia's gross costs of \$180 million for mid-day storage over a 10-year period.

Mr. Schofield reviewed the next steps with the various agreements being negotiated. He emphasized that on the operating side, VRE wants to take advantage of capacity enhancements.

Chair de Ferranti reminded the Commission that the funding agreement will come back for Commission approval at a later date. This discussion is very helpful and part of the transparency of the public process.

Mr. Snyder expressed his excitement that Virginia is retrofitting rail to have a really comprehensive rail system that will serve all of Virginia. For future presentations, he stated that he would like to see how the VRE piece fits into the larger overall context with VPRA and Amtrak.

Department of Rail and Public Transportation (DRPT)

Acting DRPT Director Zach Trogdon reported that DRPT staff are engaged in the SJ 28 Joint Subcommittee and DMVMoves work being done, as well as working closely with NVTC staff. He stated that a RMP3 effort is underway and picking up steam. He suggested there be a future presentation on this at NVTC in the future.

Executive Director Report

Ms. Mattice encouraged Commissioners to read her Executive Director Newsletter, which highlights some of NVTC's recent efforts and events. She thanked everyone who attended NVTC's 60th anniversary event last month. The documentary can be viewed on-line.

Ms. Mattice stated that she attended the American Public Transportation Association's annual meeting where she participated in several key legislative steering committee meetings to help shape the next transportation authorization. She has also been named the chair of a new committee focused on developing strong transit services in multimodal corridors.

Ms. Mattice reviewed upcoming meetings. She announced the October 17 Joint WMATA Committee/Legislative and Policy Committee has been canceled. The next joint meeting is on November 21 and will be all-virtual. The next Commission is on November 7 and the Joint Legislative Forum hosted by NVTC, PRTC and VRE is on December 13 at George Mason University Schar School.

Ms. Mattice introduced new Transit Fellow Mirna Armanious, who is working with the transit team on WMATA and long-term, sustainable funding. Ms. Armanious graduated with a master's in urban and regional planning in December. Ms. Mattice also recognized Sophie Spiliotopoulos and former NVTC Transit Fellow, Rachel Inman, who just got their first journal article approved for publication in the Journal of Urban Planning and Development. They did a deep dive last year into assessing the conditions of bus stops here in Northern Virginia – work that has been highlighted at a national Transportation research conference and now in a published journal.

Ms. Mattice stated that the August Financial Reports were provided in the meeting materials. There were no comments or questions.

Adjournment

Without objection, Chair de Ferranti adjourned the meeting at 9:13 p.m.

Approved this 7th day of November 2024.

Matt de Ferranti
Chair

Sarah Bagley
Secretary-Treasurer



RESOLUTION OF COMMENDATION

SUBJECT: Commending the Honorable Mary Hynes on Her 30 Years of Dedicated Service

WHEREAS: The Northern Virginia Transportation Commission (NVTC) serves as the voice of public transit in Northern Virginia, promoting the region's transit network through effective and efficient public transit and ridesharing programs to foster economic vitality in the region and the Commonwealth;

WHEREAS: The Honorable Mary Hynes has dedicated 30 years of work on public policy and transportation issues at the county, regional and statewide levels during her tenure on the Arlington County Board (2007-2015), Northern Virginia Transportation Commission (2008-2015), Washington Metropolitan Area Transit Authority Board of Directors (2011-2015), Virginia Transit Association Board of Directors (2012-2015), Northern Virginia Transportation Authority (2014-2024), Commonwealth Transportation Board (2016-2024) and other important bodies;

WHEREAS: The Honorable Mary Hynes served with distinction as a member of NVTC from 2008 through 2015, working to advance transit in the region; holding WMATA accountable for providing fiscally sound, reliable and safe service; understanding the importance of data – its analysis and visualization; and being a consistent voice for creating and protecting dedicated transitways to better connect the entire region;

WHEREAS: As a member of the Arlington County Board, Ms. Hynes was recognized for her strong support for ART-Arlington Transit, resulting in enhanced transit options in the county;

WHEREAS: In 2013, Ms. Hynes was awarded the Elizabeth and David Scull Award for Regional Leadership, for being "a champion for connecting development and affordable housing to sound transportation planning;"

WHEREAS: In the decade or so since her departure from the local and regional bodies, Ms. Hynes continued to advocate for Northern Virginia's interests on the Commonwealth Transportation Board, where she was a strong champion for public transit and for mobility in Northern Virginia and was instrumental in the development and shaping of the SMART SCALE program as well as providing key input to ensure fair treatment of public transit investments at the state level during several rounds of the VTRANS statewide long-range transportation plan;

WHEREAS: Leveraging her years at NVTC and the WMATA Board of Directors, Ms. Hynes provided thoughtful insights and context to educate CTB Board members on WMATA issues and the launch of NVTC's Commuter Choice program, helping to educate and advocate for the use of toll revenues to provide alternative transportation options to those traveling on the I-66 and I-395/95 corridors; and

WHEREAS: In 2024, the Northern Virginia Transportation Commission proudly nominated Mary Hynes to receive the Virginia Transit Association's Joe Alexander Distinguished Public Official Leadership Award, recognizing her 30 years of work on public policy and transportation issues at the county, regional and statewide levels.

NOW, THEREFORE, BE IT RESOLVED that the Northern Virginia Transportation Commission hereby commends the Honorable Mary Hynes for her service to the citizens of Northern Virginia and to the Commonwealth of Virginia.

BE IT FURTHER RESOLVED that NVTC prepare a copy of this resolution for presentation to Ms. Hynes as an expression of its gratitude and in appreciation for her leadership and work in in promoting and funding public transit and ridesharing in Northern Virginia.

Approved this 3rd day of October 2024.

A handwritten signature in black ink, reading "Matt de Ferranti". The signature is written in a cursive style with a horizontal line underneath the name.

Matt de Ferranti
Chair

RESOLUTION #2540

SUBJECT: Approve the Amended VRE Operations Board Electronic Participation Policy

WHEREAS: The Virginia Railway Express Operations Board Electronic Participation Policy was adopted in 2021;

WHEREAS: The VRE Operations Board Electronic Participation Policy was last amended July 2022;

WHEREAS: Updates to the VRE Operations Board Electronic Participation Policy are necessary to reflect recent changes to the Virginia Code - Freedom of Information Action as a result of legislation passed in the 2024 General Assembly Session and signed into law by the Governor;

WHEREAS: Virginia Railway Express Legal Counsel, Steve MacIsaac, has reviewed the updates; and

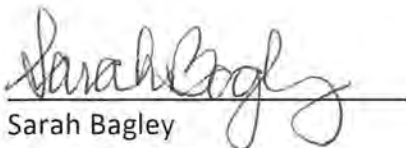
WHEREAS: The VRE Operations Board recommends the following action.

NOW, THEREFORE, BE IT RESOLVED that the Northern Virginia Transportation Commission hereby approves the amended Virginia Railway Express Operations Board Electronic Participation Policy.

Approved this 3rd day of October 2024.



Matt de Ferranti
Chair



Sarah Bagley
Secretary-Treasurer

RESOLUTION #2541

SUBJECT: Approve and Authorize the VRE CEO to Amend the Lease Agreement for Parking at the VRE Broad Run Station

WHEREAS: In May 2004, the VRE Operations Board recommended that the Northern Virginia Transportation Commission (NVTC) and the Potomac and Rappahannock Transportation Commission (PRTC) (the "Commissions") authorize the Acting VRE Chief Operating Officer to enter into an agreement with Prince William County to complete parking expansion projects at the VRE Broad Run Station;

WHEREAS: These parking expansion projects included demolition of the barn adjacent to the VRE Broad Run Yard facility as well as construction of a new parking lot on the land previously occupied by the barn;

WHEREAS: A Lease Agreement was subsequently established, commencing in October 2004, with Prince William County allowing VRE to utilize the newly constructed parking lot for a term of twenty (20) years through October 2024;

WHEREAS: An amendment to Lease Agreement is necessary to extend the term for an additional twenty (20) years through October 2044; and

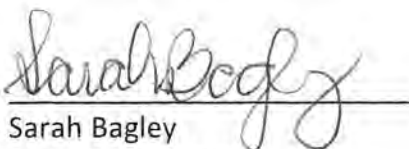
WHEREAS: The VRE Operations Board recommends the following action.

NOW, THEREFORE, BE IT RESOLVED that the Northern Virginia Transportation Commission hereby approves and authorizes the VRE Chief Executive Officer to execute an amendment to the Lease Agreement with the Board of County Supervisors of Prince William County, Virginia for real property used for parking at the VRE Broad Run Station to extend the Lease Agreement for twenty (20) years at the cost of \$1 per year.

Approved this 3rd day of October 2024.



Matt de Ferranti
Chair



Sarah Bagley
Secretary-Treasurer

RESOLUTION #2542

SUBJECT: Authorize the VRE CEO to Refer the Preliminary FY 2026 VRE Operating and Capital Budgets to the Participating and Contributing Jurisdictions

WHEREAS: The VRE Master Agreement requires the VRE Operations Board submit to the Commissions a preliminary fiscal year budget by September 30 each year;

WHEREAS: The VRE Chief Executive Officer has provided the VRE Operations Board with the preliminary FY 2026 Operating and Capital Budget;

WHEREAS: The preliminary FY 2026 budget proposes a total jurisdictional subsidy of \$19,764,842 and no changes to existing passenger fares;

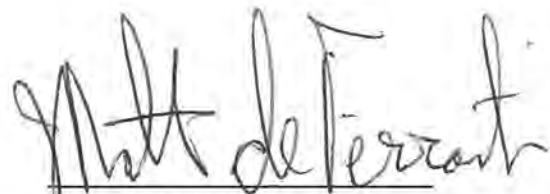
WHEREAS: The VRE Operations Board has directed the VRE CEO to consider and address comments by the jurisdictions and to present a final recommended budget to the VRE Operations Board at the December 2024 meeting for consideration and referral to the Commissions for adoption in January 2025; and

WHEREAS: The VRE Operations Board recommends the following action.

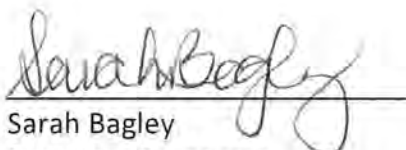
NOW, THEREFORE, BE IT RESOLVED that the Northern Virginia Transportation Commission hereby authorizes the VRE CEO to refer the preliminary FY 2026 Operating and Capital Budget to the jurisdictions for further formal review and comment.

BE IT FURTHER RESOLVED that NVTC directs the VRE Operations Board to forward a final recommended budget to the Commissions for consideration for adoption in January 2025.

Approved this 3rd day of October 2024.



Matt de Ferranti
Chair



Sarah Bagley
Secretary-Treasurer

RESOLUTION #2543

SUBJECT: Authorize the VRE CEO to Execute an Operating Access Agreement with Norfolk Southern Railway for Track Access and Dispatching

WHEREAS: The Northern Virginia Transportation Commission (NVTC) and the Potomac and Rappahannock Transportation Commission (PRTC) (the "Commissions") currently have an amended Operating Access Agreement with Norfolk Southern Railway that has been extended through October 10, 2024;

WHEREAS: Following negotiations with Norfolk Southern Railway and the Virginia Passenger Raily Authority (VPRA), most of the current Manassas Line was purchased by the Virginia Passenger Rail Authority effective September 5, 2024;

WHEREAS: The new Operating Access Agreement between VRE and Norfolk Southern Railway permits VRE operations on the portions of the Manassas Line retained by Norfolk Southern Railway and provides dispatching services for VRE trains;

WHEREAS: A fixed operating fee has been established for both access and dispatching services and will be escalated annually by an agreed upon Association of American Railroads (AAR) index;

WHEREAS: Funding for the Norfolk Southern Railway fixed operating fee has been included in the VRE FY 2025 budget;

WHEREAS: Funding for additional fiscal years will be included in the annual budgets submitted for approval to the VRE Operations Board and Commissions; and

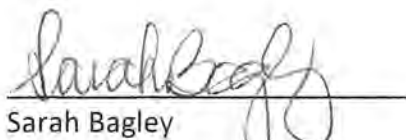
WHEREAS: The VRE Operations Board recommends the following action.

NOW, THEREFORE, BE IT RESOLVED that the Northern Virginia Transportation Commission hereby authorizes the VRE Chief Executive Officer to execute an Operating Access Agreement with the Norfolk Southern Railway Company for track access and dispatching.

Approved this 3rd day of October 2024.



Matt de Ferranti
Chair



Sarah Bagley
Secretary-Treasurer



TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice, Rhonda Gilchrest and Matt Friedman
DATE: October 31, 2024
SUBJECT: Consent Agenda

At the November meeting, the Commission will be asked to approve the Consent Agenda which includes two action items regarding the 2025 Meeting Schedule and the issuance of a Request for Proposals for creative services.

ACTION: Approve the Consent Agenda

A. Approve the 2025 Meeting Schedule

The Commission is asked to approve the proposed 2025 Meeting Schedule. The Executive Committee discussed the proposed schedule and recommended a few modifications to the schedule:

- **The proposed January 2025 meeting date is January 16, 2025** (moved from the first Thursday, January 2 to the third Thursday). The rationale for the date change is that January 2 is still during the holiday season, with all the local school districts still on leave, and the date also conflicts with the City of Alexandria’s swearing in ceremony for city council members. By changing the date, NVTC has a better chance of meeting its quorum requirements. As NVTC will be hosting a legislative reception on February 6 in Richmond (in lieu of a February Commission meeting), a later January meeting date does not impact the overall meeting schedule.
- **The proposed July 2025 meeting date is July 17, 2025** (moved from the first Thursday, July 3 to the third Thursday). With July 3 being the day before the Fourth of July holiday, the Executive Committee recommends the date be changed to an **all-virtual meeting on July 17**.
- **The October 2, 2025 meeting is canceled**, due to the Jewish holiday Yom Kippur. The third Thursday, October 16, 2025, will be used for committee meetings to continue NVTC’s work on important issues. **Committee members are asked to hold Thursday, October 16, 2025 on their calendars**. The Executive Committee will meet at 6:00 p.m., followed by the Joint WMATA Committee/Legislative and Policy Committee meeting at 7:00 p.m.

The other 2025 Commission meeting dates will remain the first Thursday of the month at 7:00 p.m., with the Executive Committee meeting at 6:00 p.m. NVTC traditionally holds committee meetings on the third Thursday of the month, so Commissioners are asked to hold those dates listed in the meeting schedule. Committee meeting dates are subject to change depending on agenda content. Please note that committee meetings in April and June 2025 fall on different dates than the third Thursday because of already anticipated conflicts. The Joint Program Advisory Committee/Joint Commission Working Group will meet all-virtually on the fourth Thursday, April 24, 2024, at 4:30 p.m. The Joint WMATA Committee/Legislative and Policy Committee will meet on the third Wednesday, June 18, since June 19 is a federal holiday.

B. Authorize the Executive Director to Issue a Request for Proposals for Creative Services

The Commission is asked to authorize the executive director to issue a Request for Proposals (RFP) for creative services for NVTC, with an expected initial contract term of three years with options to extend for two additional one-year periods, resulting in a possible total of five years. The selected firm shall be responsible for, but not be limited to, the following tasks:

- Provide creative services required to assist NVTC in its effort to achieve communications and marketing objectives to be identified by the executive director, communications and public affairs manager, marketing and engagement manager and the Commission as a whole.
- Develop and produce tangible materials to support NVTC activities which shall include promoting public transportation, future transit projects, efforts to gain funding for projects and other communication and outreach activities.
- Perform work as required depending upon the contractor's expertise and the needs of NVTC, within the areas of producing creative design assets.

NVTC's current contract for creative services expires on March 31, 2025. Following the procurement process and a formal evaluation of the proposing

firms, staff will return in March to seek Commission authorization to award a new contract. These services will be funded through NVTC's General and Administrative Budget.

NVTC 2025 MEETING SCHEDULE

--PROPOSED--



NVTC Commission Meetings

The Commission meets at 7:00 p.m. on the first Thursday of the month. Meetings are held in the First Floor Main Conference Room of the Navy League Building, 2300 Wilson Blvd, Arlington, Virginia, unless otherwise noted.*

[Public Streaming Via YouTube](#)

NVTC Committee Meetings

The Executive Committee meets monthly prior to the Commission meeting at 6:00 p.m. in Suite #230 of the Navy League Building. Other committees meet as needed in Suite #230 unless otherwise noted.*

Please check NVTC's [meeting website page](#) for updates.

If NVTC decides to change a meeting to an all-virtual meeting, NVTC will provide a new meeting notice in accordance with the provisions of the Freedom of Information Act, and will notify Commissioners, staff and public at least 72 hours in advance of the meeting. Updated meeting information will be posted on [NVTC's meeting website page](#).

COMMISSION MEETINGS

EXECUTIVE COMMITTEE MEETINGS

WMATA COMMITTEE MEETINGS

LEGISLATIVE AND POLICY COMMITTEE MEETINGS

POLICY ADVISORY COMMITTEE (PAC) MEETINGS

JOINT COMMISSION WORKING GROUP (JCWG) MEETINGS

MISCELLANEOUS MEETINGS

JANUARY 2025

- 16 - Executive Committee* (6:00 PM) (in lieu of Jan 2)
- 16 - Commission Meeting* (7:00 PM)

FEBRUARY 2025

- 6 - Legislative Reception - Richmond* (4:45-7:00 PM)
(Commonwealth Strategy Group, 118 N. 8th Street, Richmond)
- 20 - Program Advisory Committee (4:30 PM)
- 20 - JOINT NVTC WMATA Committee/Legislative and Policy Committee (6:00 PM)

MARCH 2025

- 6 - Executive Committee (6:00 PM)
- 6 - Commission Meeting (7:00 PM)

APRIL 2025

- 3 - Executive Committee (6:00 PM)
- 3 - Commission Meeting (7:00 PM)
- 24 - JOINT Program Advisory Committee/Joint Commission Working Group (4:30 PM) (all-virtual)

MAY 2025

- 1 - Executive Committee (6:00 PM)
- 1 - Commission Meeting (7:00 PM)
- 15 - JOINT NVTC WMATA Committee/Legislative and Policy Committee (6:00 PM)

JUNE 2025

- 5 - Executive Committee (6:00 PM)
- 5 - Commission Meeting (7:00 PM)
- 18 (Wed)- JOINT NVTC WMATA Committee/Legislative and Policy Committee (6:00 PM)

JULY 2025

- 17 - Executive Committee* (6:00 PM) (all-virtual) (in lieu of 7/3)
- 17 - Commission Meeting* (7:00 PM) (all-virtual)

AUGUST 2025

No Commission Meeting

SEPTEMBER 2025

4 - Executive Committee (6:00 PM)

4 - Commission Meeting (7:00 PM)

18 - Program Advisory Committee (4:30 PM)

18 - Joint NVTC WMATA Committee/Legislative and Policy Committee (6:00 PM)

OCTOBER 2025

No Commission Meeting

16 - Executive Committee* (6:00 PM)

16 - Joint NVTC WMATA Committee/Legislative and Policy Committee (7:00 PM)

NOVEMBER 2025

6 - Executive Committee (6:00 PM)

6 - Commission Meeting (7:00 PM)

20 - JOINT NVTC WMATA Committee/Legislative and Policy Committee (6:00 PM)

DECEMBER 2025

4 - Executive Committee (6:00 PM)

4 - Commission Meeting (7:00 PM)

TBD - Joint NVTC, PRTC and VRE Legislative Forum (8:30 AM) (location TBD)*



TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice, Allan Fye, Andrew D’huyvetter and Adam Hager
DATE: October 31, 2024
SUBJECT: Washington Metropolitan Area Transit Authority (WMATA)

At the November 2024 meeting, the Commission will receive a report from the Virginia WMATA Board members.

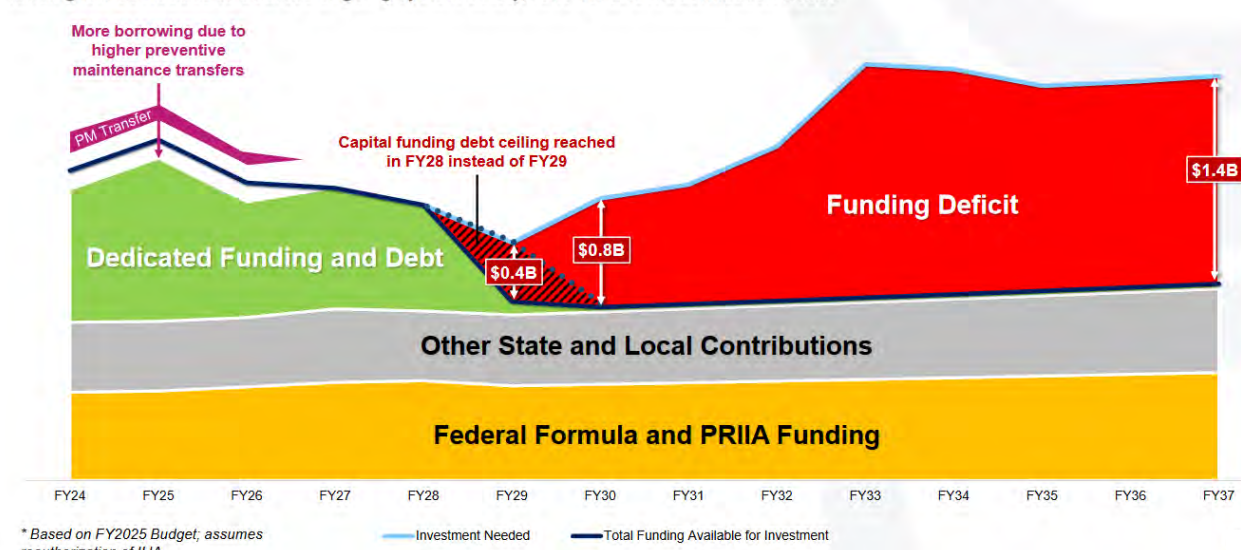
A. Virginia WMATA Board Members Report

- Capital Program Update

On October 24, the WMATA Finance and Capital Committee received a [briefing on WMATA's Capital Program](#). WMATA faces a capital funding cliff as dedicated capital funding bond capacity is projected to be exhausted in FY 2028 (Figure 1). WMATA has made significant progress in addressing overdue state of good repair needs, reducing the state of good repair backlog from nearly \$7 billion in FY 2016 to \$4 billion in FY 2024 (Figure 2). Because the Passenger Rail Investment and Improvement Act (PRIIA) funding and 2018 regional dedicated capital funding were not indexed to inflation, their value has eroded over time. Recent transfers of preventive maintenance expenses above historical averages and higher than historic levels of inflation have also accelerated the exhaustion point of dedicated capital funding bond capacity where most of the funding will go to debt service payments.

Figure 1: WMATA Capital Funding Deficit

Dedicated capital funding borrowing capacity projected to be exhausted in about FY2028 and new capital funding will be needed to address ongoing system safety, renewal and modernization needs

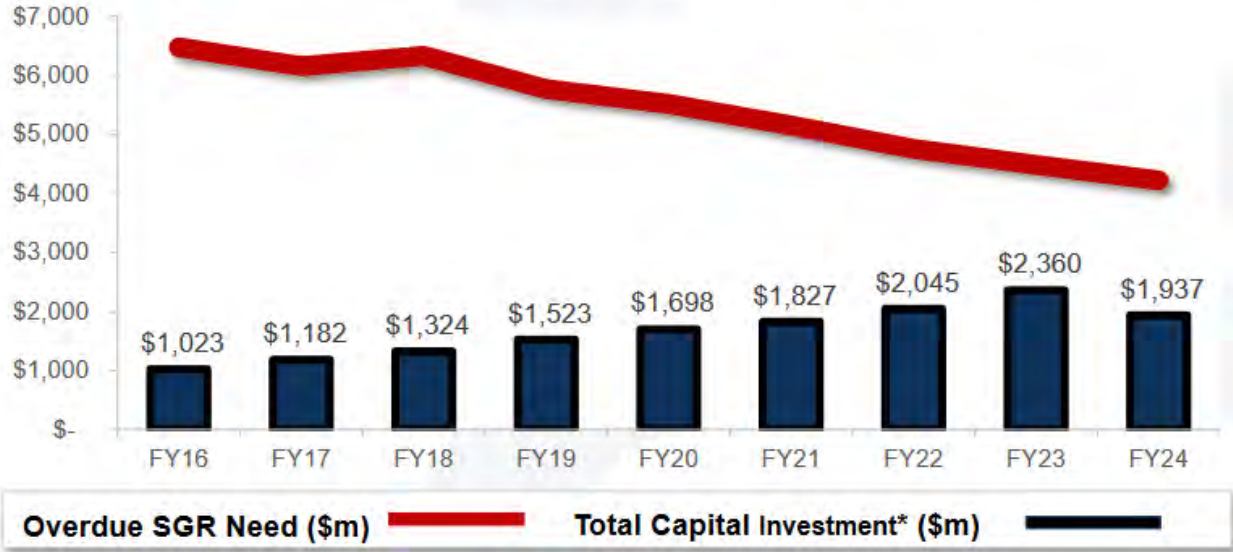


* Based on FY2025 Budget; assumes reauthorization of IJIA
 — Investment Needed — Total Funding Available for Investment

Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

Figure 2: Dedicated Funding Allowed State of Good Repair Investment to Rise

Overdue State of Good Repair Need (\$m) & Total Capital Investment



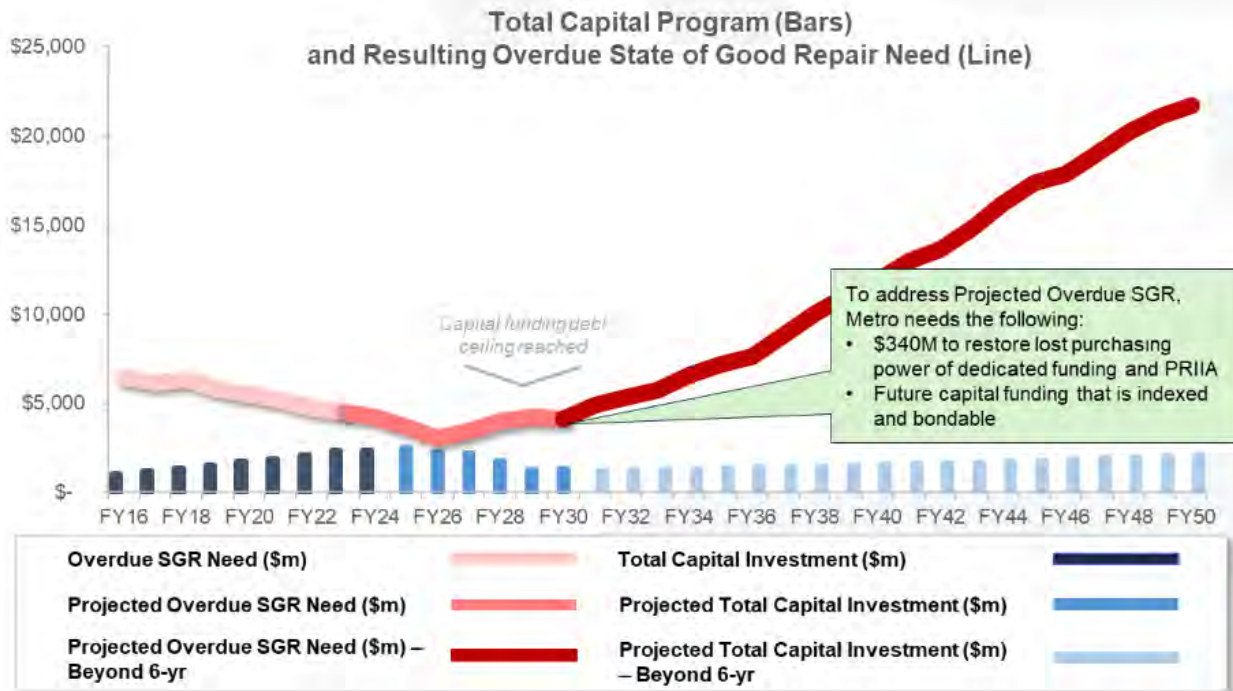
Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

While the debt ceiling is anticipated to be reached in FY 2028, WMATA is already operating in a fiscally constrained capital environment. If its capital funding deficit is not addressed, WMATA will see its state of good repair backlog grow, declining reliability, a worse customer experience and increased safety risks.

WMATA’s current, proactive approach within its capital approach enabled planning for asset replacement before failure. Without additional funding to support the capital program, WMATA will be forced to return to a reactive approach – as was done before the 2018 Dedicated Funding Agreement – which will require corrective maintenance actions. After FY 2028, WMATA would see its overdue state of good repair needs grow significantly after a steady decline from FY 2016 to FY 2024 (Figure 3).

As WMATA faces a significant capital funding cliff, the agency has identified an estimated \$275 million in capital program cost savings between \$175 million in administrative savings between FY 2025-2030 and \$100 million through project reviews that have brought about recurring savings through simplifying standards and requirements and reducing customization.

Figure 3: Deficit Threatens Progress Made on State of Good Repair Needs



Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

Two key capital initiatives underway that will be impacted by WMATA’s financial situation are the zero-emission bus transition and purchase of 8000-series railcars. The initial phase of the zero-emission bus transition, which includes the conversion of the Bladensburg, Northern and Cinder Bed Bus Divisions to zero-emission facilities and purchasing the first increments of battery electric buses for those facilities, is funded and in WMATA’s FY 2025-2030 Capital Improvement Program (CIP), but the execution of the facility conversion and electric bus procurement are both facing challenges putting the transition’s first phase at risk (Figure 4).

Figure 4: Zero-Emission Bus Transition Challenges

External market conditions & funding limitations put Metro’s zero-emission bus transition goals at risk

- Limited domestic bus manufacturing capacity
- Actively participating in national conversation (APTA, FTA, White House) addressing bus manufacturing challenges
- No funding available for conversion of remaining ~75% of bus fleet and associated facilities

Metro will continue to assess market and technology conditions and will continually update our zero-emission strategy

FUTURE STRATEGIES

Zero-emission buses are only part of the strategy to support environmental goals

- Continue initial phases of funded & underway investments
- Increase reliability of current bus service to incentivize public transit
- Assess other low- and zero-emission technologies

Absent market shifts and increased funding, Metro will not be able to further advance the zero-emission bus transition

- Frequent transit service drives ridership and contributes to regional emission reductions regardless of propulsion type
- Metro and the region should not sacrifice safe, frequent, and reliable service
- Metro cannot afford to convert additional facilities to charge buses or the incremental cost increase of the vehicles
- Metro will continue use of conventional hybrid and/or compressed natural gas (CNG) buses to maintain service

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Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

Without increased funding, WMATA indicated it will not be able to further advance its zero-emission bus transition. WMATA's current CIP also includes funding for the initial purchase (256 vehicles) and the first option (104 vehicles) of 8000-series railcars. While funded, WMATA will require additional operating resources for increased rail service to support growing ridership (Figure 5).

Figure 5: 8000-Series Railcar Purchase Considerations

NEED

- New railcars maintain the fleet in a state of good repair, supporting safety and reliability
- Replace legacy railcars
- Improved customer features - modern technology and open gangways

CONSIDERATIONS

- Delivery of first increment of 256 vehicles replaces legacy fleet railcars beginning in 2028
- Option for second increment of 104 vehicles
 - Capital investment funded in program; additional operating resources required for increased rail service to support growing ridership
- Additional increments would enable future service and capacity improvements
 - Capital and operating needs not funded



FY2026 ACTIVITY

- Metro is completing preliminary design phase and plans to transition to final design phase in Winter 2025
- Manufacturing facility construction complete; production begins

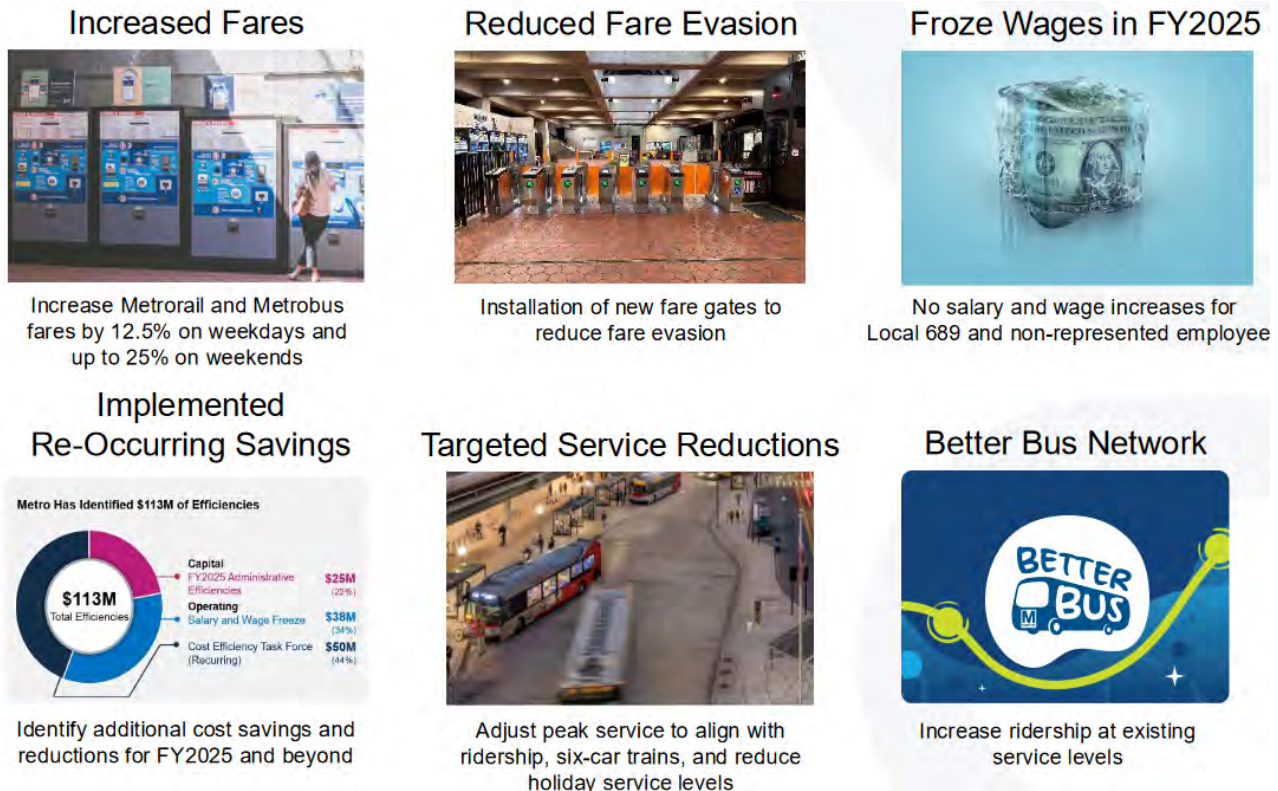
Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

Later this fall, WMATA intends to publish an updated, long-range list of capital needs along with the General Manager/CEO FY 2026 Proposed Budget and six-year CIP.

▪ FY 2026 and FY 2027 Operating Outlook

On October 24, the WMATA Finance and Capital Committee received a [briefing on WMATA's FY 2026-27 Operating Outlook](#). As an early step in the budget process, WMATA provides an overview to the Board highlighting key inputs into its forthcoming operating budget. New in this year's operating outlook and for planning purposes only is the inclusion of a second year (FY 2027) to give regional stakeholders insight into trends and drivers that WMATA expects to factor into overall expenses and revenues for the following fiscal year. In the FY 2025 budget process, WMATA's funding jurisdictions made substantial commitments to help close what was at the time a \$750 million operating budget gap – Virginia committed to two years of additional investment. Since this time, WMATA took a series of actions to reduce expenses and grow revenue to help minimize future impacts on subsidy growth (Figure 6).

Figure 6: Actions Taken to Reduce Expenses and Grow Revenue



Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

WMATA presented a series of key budget drivers for the next two years including ridership recovery, funding constraints, inflation and new collective bargaining agreements (CBAs). Notably, early FY 2025 numbers show ridership above budgeted levels and WMATA is currently negotiating with transit police, Local 922 and Local 2 on their next round of CBAs (Figure 7).

Figure 7: FY 2026 and FY 2027 Budget Drivers

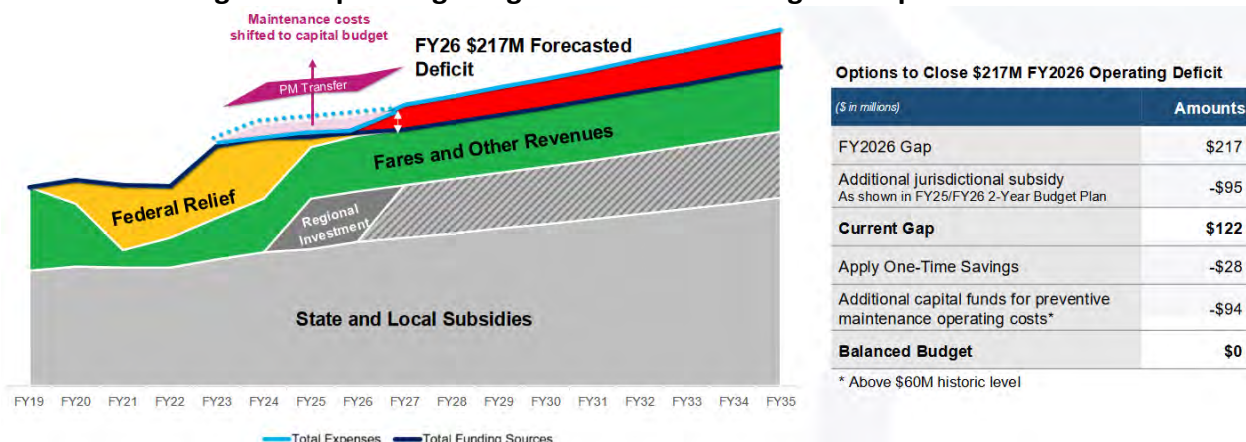


*Recovery percentage based on FY2019 Actuals of 301.5 million trips for Pre-Covid Ridership
 **Additional stipulations for cost-of-living adjustments (COLA). Total adjustments capped at 5% including GWI.

Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

WMATA is advancing several strategies to continue its focus on cost savings from technology enhancement to contract consolidation in procurement. There are also plans to return to automatic train operation (ATO) and return to design speed in FY 2026 which will enhance efficiency of the rail system and lower overall costs. Despite these strategies, WMATA is facing a \$217 million forecasted operating budget deficit in FY 2026 (Figure 8) due largely to the expiration of pandemic-era federal aid (\$95 million in the FY 2025 budget) and less reliance on preventive maintenance expense transfers from the capital budget. As first projected in the FY 2025 budget process, WMATA anticipates additional jurisdictional subsidy of \$95 million, application of one-time savings from FY 2024 (\$28 million), and \$94 million in preventive maintenance transfers to close the \$217 million gap. Virginia’s share of the additional jurisdictional subsidies for FY 2026 was included in the Commonwealth’s Biennium Budget. However, beginning in FY 2027, no funding has been identified that would continue Virginia’s share – split between the Commonwealth and NVTC jurisdictions – of the additional regional investments necessary to keep WMATA’s operating budget fully funded.

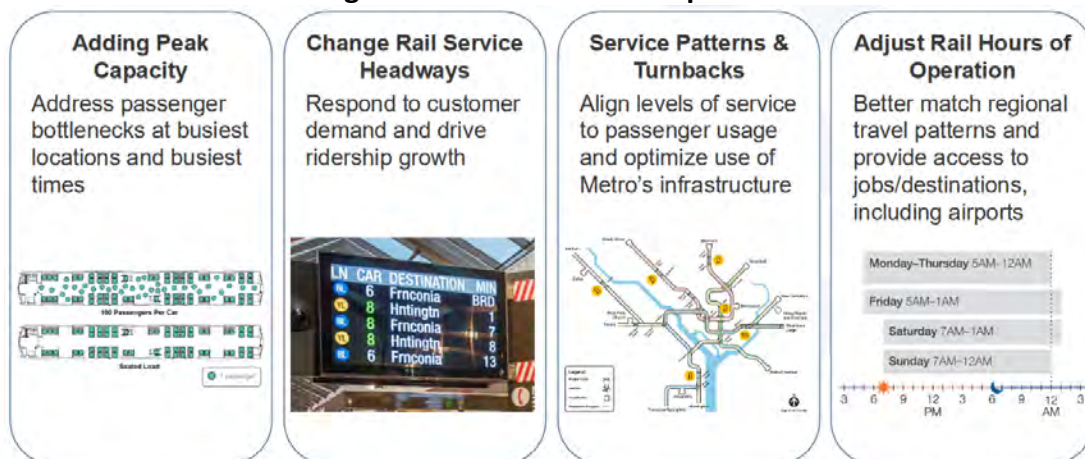
Figure 8: Operating Budget Deficit and Closing the Gap in FY 2026



Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

WMATA is also developing ways to drive cost savings by optimizing service, including adding peak capacity and adjusting service patterns to meet demand (Figure 9).

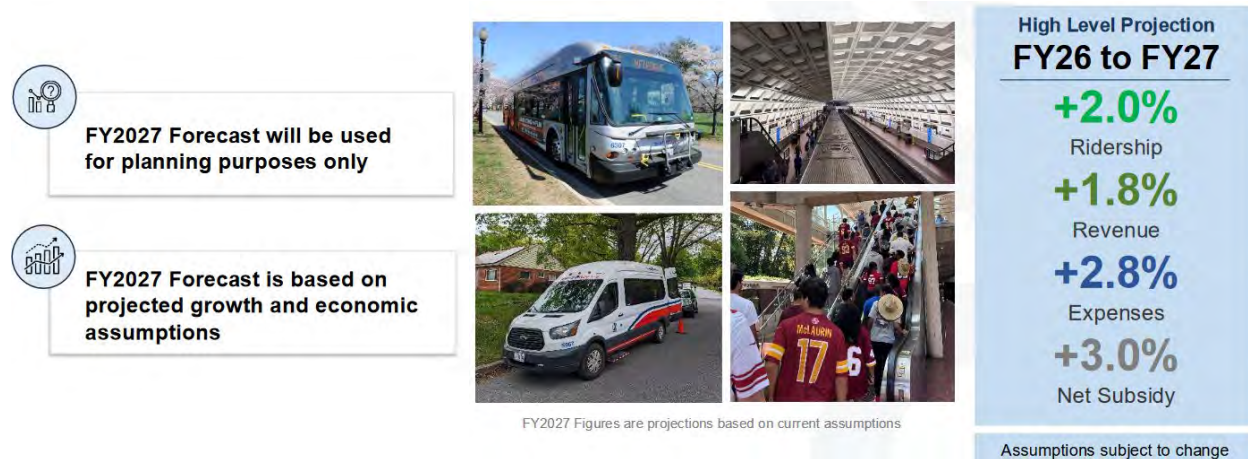
Figure 9: WMATA Service Optimization Efforts



Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

Looking further ahead, WMATA anticipates modest growth in ridership, revenue, expenses and net subsidy in FY 2027 (Figure 10). WMATA staff will present a detailed budget outlook in November before releasing its GM/CEO FY 2026 Proposed Budget in December. In March, the WMATA Board is expected to approve the FY 2026 operating budget and FY 2026-2031 CIP.

Figure 10: FY 2027 Operating Forecast

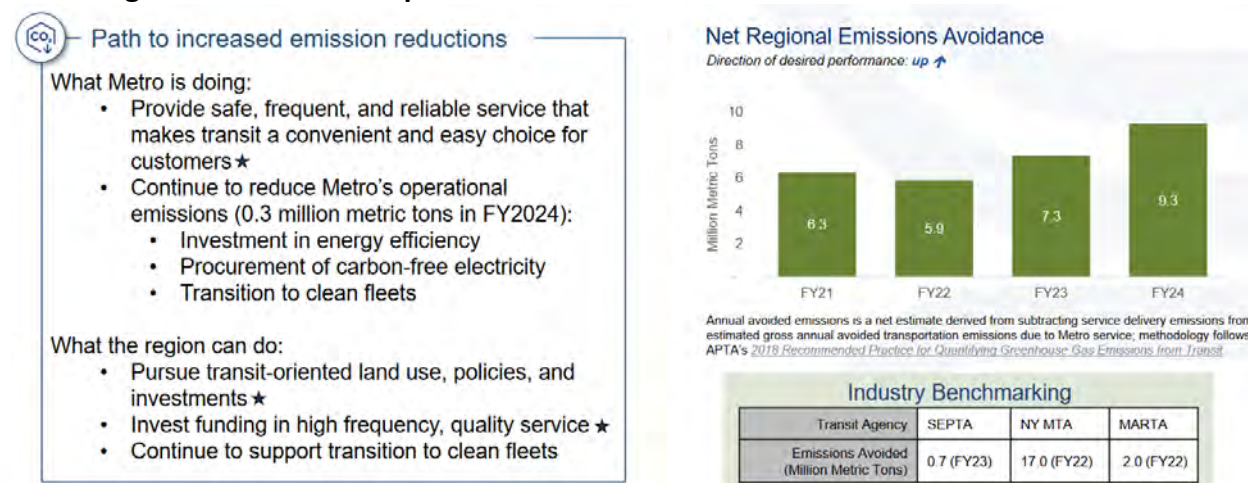


Source: [October 24, 2024 WMATA Finance and Capital Committee Meeting](#)

▪ **FY 2024 Environmental Sustainability Report**

On October 10, the WMATA Finance and Capital Committee [received a briefing on WMATA's FY 2024 Environmental Sustainability Report](#). A key objective in [WMATA's Strategic Transformation Plan](#) (STP), WMATA's environmental sustainability efforts prevented 9.3 million metric tons of emissions in FY 2024 which is 30 times greater than the emissions generated from WMATA's own operations (Figure 11). WMATA tracks progress across eight metrics, including greenhouse gas emissions intensity to transitioning to a zero-emission bus fleet, to determine its impact on moving the region toward a more sustainable future.

Figure 11: WMATA Helped Avoid 9.3 Million Metric Tons of Emissions in FY 2024



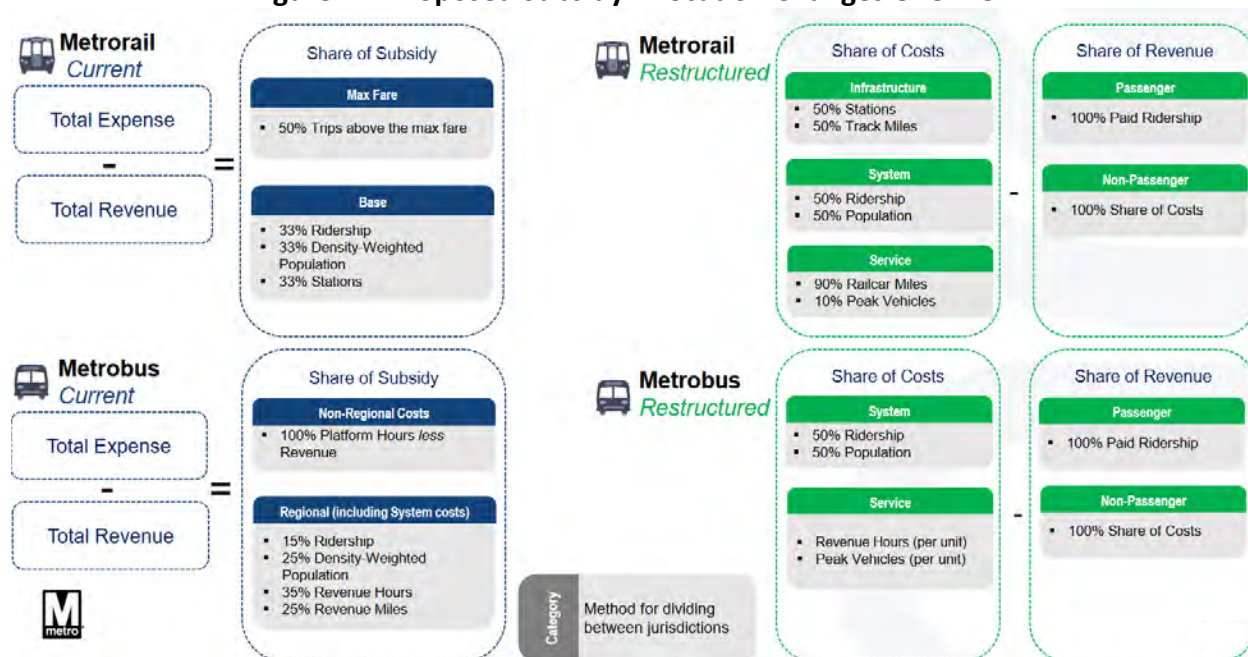
Source: [October 10, 2024 WMATA Finance and Capital Committee Meeting](#)

WMATA staff highlighted several areas with opportunities to further drive regional sustainability: providing safe, frequent and reliable service; regional partnerships that prioritize transit, walking and biking; and investing in new technologies to enhance energy and cost-efficiency.

▪ Restructuring Metrobus and Metrorail Operating Subsidy Allocation Formulas

On October 10, the WMATA Finance and Capital Committee received an [update on WMATA's efforts to restructure the Metrobus and Metrorail operating subsidy allocation formulas](#). WMATA's existing subsidy allocation formulas date back to 1977 and 1998 for rail and bus, respectively, although the WMATA Board adopted modified formulas to address Virginia's and Maryland's 3% cap legislation from FY 2020 to FY 2024. While both current formulas allocate costs after total revenues are subtracted from total expenses, the proposed restructured formulas allocate costs and revenues to better align service delivered with jurisdictional investments and to provide incentives to continue addressing fare evasion (Figure 12).

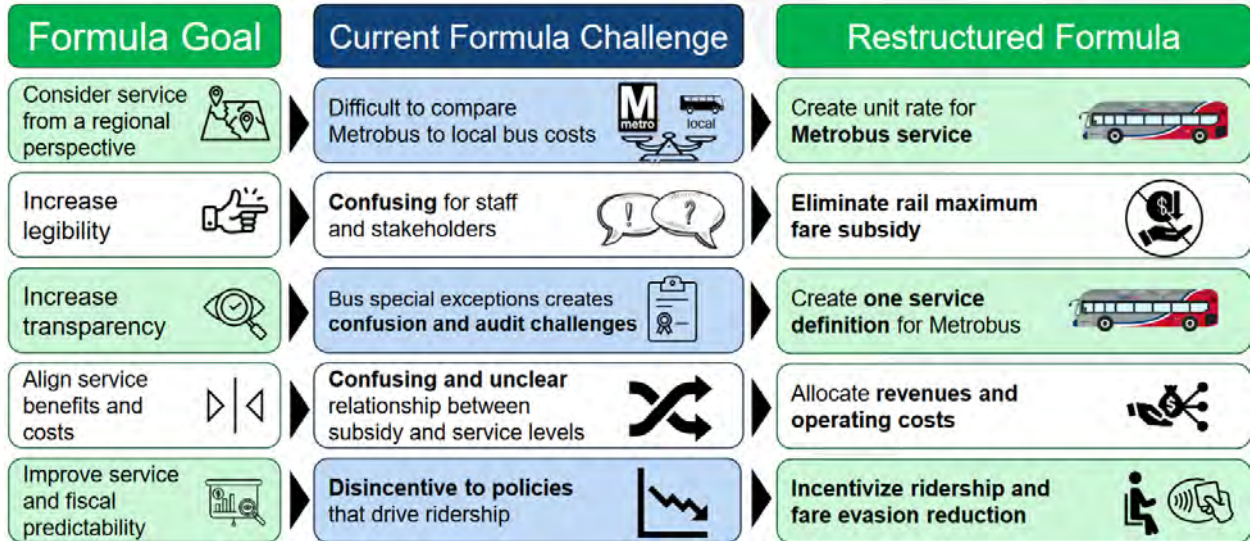
Figure 12: Proposed Subsidy Allocation Changes Overview



Source: [October 10, 2024 WMATA Finance and Capital Committee Meeting](#)

The proposed formulas also address other challenges associated with the current formulas (Figure 13). On the bus side, for example, it has been difficult to compare Metrobus costs to local bus costs. The proposed Metrobus formula generates a unit rate for Metrobus service which enables jurisdictions to make informed decisions about how Metrobus service and local bus service can best serve their residents. The proposed Metrorail formula eliminates the maximum fare subsidy, a confusing component of the current formula. A key enhancement of the proposed restructured formula is a better alignment between benefits and costs. Under the current formula, it is difficult to predict how subsidy levels might change when service levels change. With the proposed formula, both revenues and operating costs are allocated to the funding jurisdictions, offering more predictability in subsidy changes when service levels are adjusted or new service is added to the system.

Figure 13: How the Restructured Proposal Addresses Formula Challenges



Source: [October 10, 2024 WMATA Finance and Capital Committee Meeting](#)

Over the last year WMATA staff facilitated extensive coordination with jurisdictional staff in Maryland, DC and Virginia in addition to multiple work sessions with the WMATA Board to incorporate their guidance. WMATA staff will present the proposed changes to the Finance and Capital Committee before anticipated Board adoption in November. Once adopted, the new formulas will be used for the FY 2026 Proposed Budget in December.

▪ Approval of Annual Agency Safety Plan

October 10, the WMATA Board approved its [annual Agency Safety Plan \(ASP\)](#). Having [briefed WMATA’s Safety and Operations Committee earlier in the day](#), WMATA staff highlighted changes to the ASP from the prior year, including new Federal Transit Administration regulations, progress with the Safety Management System (SMS) implementation, streamlining risk assessment processes and incorporating feedback from WMATA employees and other stakeholders (Figure 14).

Figure 14: Key Changes to WMATA’s 2025 Agency Safety Plan

- Regulatory Changes
 - ✓ Risk Reduction Program
 - ✓ Bus Operator Accident Reduction
 - ✓ Transit Worker Assaults Mitigation
- Internal Changes
 - ✓ Revised risk assessment process
 - ✓ Departmental re-organization
 - ✓ Departmental milestones



Source: [October 10, 2024 WMATA Safety and Operations Committee Meeting](#)

An annual safety plan is required for transit operators that receive federal funds. WMATA’s ASP describes the implementation of the mission through four key components of an SMS: Safety Policy, Safety Risk Management, Safety Assurance, and Safety Promotion (Figure 15).

Figure 15: Components of a Safety Management System



Source: [October 10, 2024 WMATA Safety and Operations Committee meeting](#)

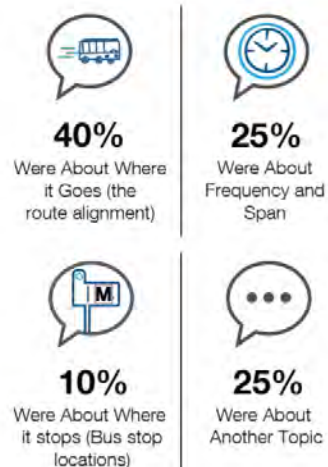
As part of its oversight responsibilities, the Washington Metrorail Safety Commission (WMSC) is required to review and approve the ASP. Once approved by the WMATA Board of Directors and WMSC, WMATA will submit the ASP to the Federal Transit Administration by December 31, 2024.

▪ **Better Bus Network Redesign**

On October 10, the WMATA Safety and Operations Committee received a [briefing on the Better Bus Network Redesign](#). WMATA received over 13,000 comments in conducting a third and final round of public engagement on a proposed 2025 Better Bus Network that has the potential to serve more people at existing resource levels (Figure 16).

Figure 16: Public and Stakeholder Input Informs the Revised Year One Network

- Metro reviewed all 13,000+ comments
- Used to better address customer needs and concerns, while still working towards project’s goal
- Ongoing efforts focused on:
 - Addressing as many major customer concerns as possible:
 - Revisions that advance project regional connectivity, customer and operator experience, and equity
 - Revisions where data shows changes are warranted
 - Carrying over existing proposals where:
 - Data re-affirm the proposed alignment change, service reduction, or elimination
 - Changes create unsafe operating conditions due to street geometry
 - Comments conflict with one another
 - Changes aren’t possible due to resource constraints



Source: [October 10, 2024 WMATA Safety and Operations Committee Meeting](#)

WMATA staff addressed potential impacts on paratransit service resulting from any changes to bus service. In a memo to the Board, WMATA staff noted:

Federal law requires the provision of paratransit services by bus and rail service providers where fixed route service is provided. The Metro Board has maintained a consistent paratransit service boundary since 2010. The Board may choose to revise the paratransit boundaries to the Federal minimums or to maintain service for existing customers while limiting access for new potential customers based on the revised service plan. The Board could also choose to maintain the existing paratransit boundaries and further expand coverage for MetroAccess customers to new areas where fixed-route services are expanding as part of the Network Redesign. Staff recommends this latter course, thereby providing the most access possible to this group of customers.

Source: [October 10, 2024 WMATA Safety and Operations Committee Meeting](#)

If the Metrobus subsidy allocation formula revision is approved by the WMATA Board in fall 2024, the 2025 Better Bus Network could be implemented as soon as summer 2025. Once implemented, the 2025 Better Bus Network will better connect people with where they want to go, provide more frequent, consistent bus service and make bus service easier to understand for the region's riders. It is anticipated that the WMATA Board will consider the 2025 Better Bus Network for approval in November.



AGENDA ITEM #5 Report from the Chairs of the WMATA/ Legislative and Policy Committees

TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice, Allan Fye, Andrew D’huyvetter, Adam Hager and Daniel Knickelbein
DATE: October 31, 2024
SUBJECT: Report from the Chairs of the WMATA Committee/Legislative and Policy Committees

At the November 2024 meeting, the Commission will receive a report from the chairs of the WMATA Committee/Legislative and Policy Committee, which will include an update on NVTC’s 2024 Annual Report on the Performance and Condition of WMATA, the SJ 28 Joint Subcommittee and the draft 2025 Legislative and Policy Agenda.

A. NVTC 2024 Annual Report on the Performance and Condition of WMATA

The Commission will receive a briefing on NVTC’s 2024 Annual Report on the Performance and Condition of WMATA. Required by [§ 33.2-3403 of the Code of Virginia](#), NVTC produces a report each year on:

- The safety and reliability of the rapid heavy rail mass transportation system and bus network;
- The financial performance of WMATA related to the operations of the rapid heavy rail mass transportation system, including farebox recovery, service per rider, and cost per service hour;
- The financial performance of WMATA related to the operations of the bus mass transportation system, including farebox recovery, service per rider, and cost per service hour;
- Potential strategies to reduce the growth in such costs and to improve the efficiency of WMATA operations;
- Use of the funds provided from the Fund to improve the safety and condition of the rapid heavy rail mass transportation system; and
- Ridership of the rapid heavy rail mass transportation system and the bus mass transportation system.

Following the structure of the [2023 Annual Report on the Performance and Condition of WMATA](#), the 2024 NVTC report will build upon NVTC’s work over the last several years, such as NVTC’s [Metro Operating Funding and Reform Working Group Report](#), and contains a series of recommendations directed to WMATA and other entities to address WMATA’s structural cost growth, operational and financial accountability, oversight, structural funding deficit as well as capital and other focus areas (Figure 3). Most of these recommendations are directed to WMATA, either for management or the WMATA Board’s consideration, but many are also directed to

federal, state and local partners, including NVTC, who play important roles in the aforementioned areas and enable or constrain WMATA’s ability to take certain actions.

Figure 3: Annual Report Recommendations Proposed by Staff

Recommendation	Directed to	Forum
1. Continue to work with federal, state, regional and local funding partners to develop long term, sustainable, dedicated funding to meet Metro’s capital and operating needs.	VA, MD, DC and NVTC	DMVMoves, SJ 28
2. Preserve additional state aid (FY 2026) and operating cap re-baselining contained in the two-year state budget.	VA	
3. Establish a revised Virginia and Maryland legislative operating assistance growth cap.	VA, MD and WMATA Board	SJ 28
4. Sustain rail and bus service levels to continue an ongoing ridership recovery.	WMATA	
5. Establish a reserve fund and associated fiscal management policies at Metro.	WMATA Board and funding jurisdictions	
6. Return federal workers to the office and secure a replacement for the region’s losses in fares from riders using federal transit benefits.	Federal government	
7. Identify opportunities to leverage regional resources, technology and policies that benefit riders and find cost savings.	WMATA, VRE and transit agencies	DMVMoves
8. Formalize the functions and scope of a WMATA Board audit committee to enhance oversight via a coordinated jurisdictional audit.	VA, MD, DC and WMATA Board	DMVMoves
9. Manage labor cost escalation through reforms to pension and other post-employment benefits (OPEB). <ul style="list-style-type: none"> • Increase worker contributions to pensions and OPEB to reflect national averages. • Limit or prohibit overtime earnings towards retirement pay. • Implement OIG findings to improve controls and governance and explore alternative retirement plans for new employees in the next collective bargaining process. 	WMATA and labor unions	SJ 28
10. Require consideration of Metro’s fiscal condition in binding arbitration.	U.S. Congress	

The report is due to the governor and General Assembly by December 15. Following the briefing in November and external staff review and feedback, the Commission will be asked to approve the report at its December meeting.

B. NVTC Work Towards Long-Term Sustainable Dedicated Funding

Figure 1: NVTC Coordination with Transit Agencies and Jurisdictions is a Vital Component in Developing Long-Term Funding for the Region



▪ **SJ 28: Joint Subcommittee to Study Growing Transit Needs in Northern Virginia**

Senator Ebbin, chair of the SJ 28 Joint Subcommittee, and Andrew D’huyvetter, incoming chair of SJ 28 Technical Working Group, will provide a verbal overview of the SJ 28 activities to date. (Andrew D’huyvetter has been selected as NVTC’s new director of programs and policy to replace Allan Fye, who is leaving NVTC for a new job at the Federal Transit Administration. Senator Ebbin asked Mr. D’huyvetter to serve as the new chair of the SJ 28 Technical Working Group.)

The General Assembly’s Joint Subcommittee established by SJ 28 to study the growing needs of public transit in Northern Virginia held its [third of four 2024 meetings](#) on Thursday, October 17 at NVTC’s offices. The Joint Subcommittee received briefings from NVTC staff on the connections between land use and transit ridership, cost comparisons between Northern Virginia and the rest of the Commonwealth, an overview of the 10 revenue sources analyzed in NVTC’s [Metro Operating Funding and Reform Working Group Report](#) and options for up to five additional revenue sources to study in calendar year 2025. The fourth and final SJ 28 Joint Subcommittee meeting in 2024 will be held on November 12 hosted by NVTC in its first-floor conference room. The meetings are open to the public and will be livestreamed and saved on [NVTC’s YouTube channel](#).

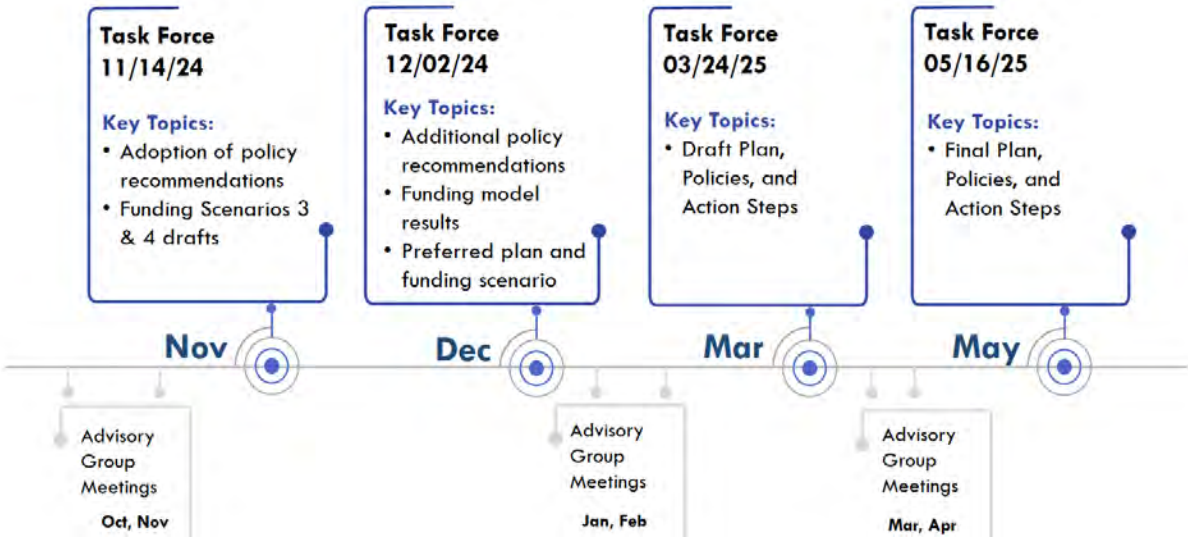
Supporting the SJ 28 Joint Subcommittee is a [Technical Working Group](#) chaired by NVTC’s Director of Programs and Policy Andrew D’huyvetter. The Technical Working Group is a staff level group with representatives from NVTC, Potomac and Rappahannock Transportation Commission, Virginia Railway Express, Department of Rail and Public Transportation, Northern Virginia Transportation Authority, the Amalgamated Transit Union Local 689 and the Northern Virginia business community.

- **DMVMoves**

At the October Commission meeting, the Commission received a report regarding the [most recent DMVMoves Regional Task Force meeting](#) which was held on Monday, September 23, 2024 at WMATA’s New Carrollton Office in Hyattsville, Maryland. The Task Force [reviewed](#) a series of recommendations from the effort’s advisory groups and discussed several funding considerations to address current and future needs of public transit agencies in the region.

The final two meetings in 2024 are scheduled for November 14 and December 2 where the Task Force is expected to take up policy recommendations, review the results of funding model scenarios and identify a preferred plan and funding scenario.

Figure 2: DMVMoves Project Schedule



Source: [DMVMoves Regional Task Force September 23, 2024 Meeting](#)

C. ACTION: Authorize the Executive Director to Issue a Request for Proposals via the DRPT General Planning Contract to Provide Technical Support to NVTC for Analysis Related to the SJ 28 Joint Subcommittee and to Execute the Associated Contract

The Commission is asked to 1) authorize the executive director to issue a Request for Proposals (RFP) to DRPT’s general planning contract (GPC) bench of consultants and 2) authorize the executive director to execute an eventual contract award to work with NVTC staff to provide funding research and technical analysis to the SJ 28 Joint Subcommittee to allow them to meet their legislative intent. The SJ 28 Joint Subcommittee is tasked with studying long-term, sustainable, dedicated operations and capital funding as well as cost-containment controls and strategies to ensure the WMATA, VRE, and the public transit systems that serve the NVTC and PRTC transportation districts meet the growing needs of public transit in the region.

To date, this work has been carried out primarily by NVTC staff but as the workload has increased, NVTC is seeking external support to ensure the SJ 28 Joint Subcommittee has the necessary analytical and administrative support to meet their mission.

Specific tasks will include:

- Developing an expanded, comprehensive menu of 15 funding sources with revenue estimates at NVTC, PRTC and statewide levels for consideration by the Northern Virginia Growing Needs of Public Transit Joint Subcommittee (SJ 28).
- Supporting research efforts to respond to requests of the SJ 28 Joint Subcommittee and SJ 28 Technical Working Group members.
- Presenting information and materials to the SJ 28 Joint Subcommittee, SJ 28 Technical Working Group, Commission and NVTC's committees as needed.

Staff anticipate a not to exceed amount of \$250,000 for this 18-month effort, which will be funded through NVTC's research budget, and by the Potomac and Rappahannock Transportation Commission and the Virginia Railway Express.

If approved by the Commission, NVTC staff anticipate issuing an RFP shortly, using DRPT's GPC bench contract. DRPT's GPC bench includes consultants that were competitively procured by DRPT in compliance with the Virginia Public Procurement Act. Using DRPT's bench contract allows NVTC to solicit and evaluate proposals from a bench of consultants that have already been vetted by DRPT, which provides for a quicker and more streamlined procurement process. NVTC's executive director would also be authorized to execute a contract with the competitively selected firm, saving time in the procurement process to ensure that the comprehensive menu of 15 funding sources and associated revenue estimates are completed with sufficient time to inform the decision-making process of the SJ 28 Joint Subcommittee.

D. Draft 2025 NVTC Legislative and Policy Agenda

The Commission is asked to review and provide feedback on the attached [draft NVTC 2025 Federal and State Legislative Agenda](#) with final Commission adoption set to occur on December 5.

Each year, the Commission adopts a set of federal and state legislative priorities to guide NVTC's legislative work for the U.S. Congress and Virginia General Assembly. Reflecting discussions at the September 19 Legislative and Policy Committee, this year's NVTC State Legislative Agenda is similar to the 2024 Agenda, with a few modifications.

- Reflecting action in the 2024 General Assembly, NVTC seeks to preserve the additional state aid for WMATA and temporary suspension of the 3% cap in annual operating subsidy growth.
- NVTC priority to preserve and restore funding of the Northern Virginia Transportation Authority has been refined to reflect a more general approach to capture any threats or losses to state, regional, and local funding for transit and transportation.
- NVTC now includes support for ongoing efforts to streamline VDOT's bus stop permitting process, as has been discussed by some of NVTC's local transit partners.
- Advance legislation that would add policies for rolling stock and operating properties of railroads used for commuter rail service in the Commonwealth, as well as cybersecurity policies for organizations operating such service, to the exemptions for state tax on surplus lines insurance.

On the federal side, NVTC’s priorities are also proposed to remain largely the same, with a continued emphasis on maximizing the region’s access to federal funding (both formula and competitive) for transit. The 2025 Federal Legislative Agenda includes a new item referencing the need to work collaboratively to address challenges in domestic bus manufacturing that was recently highlighted by an American Public Transportation Association (APTA) task force. NVTC staff have heard from the local transit providers of the importance of working with federal, state and local partners to ensure a sustainable future for domestic bus manufacturing.

Feedback from the Commission on the draft legislative priorities at the November meeting will be incorporated into a revised Agenda and brought back to the Commission for adoption at next month’s meeting in preparation for the 2025 Virginia General Assembly Session, which opens on January 8, 2025.

E. Joint NVTC-PRTC-VRE Legislative Forum

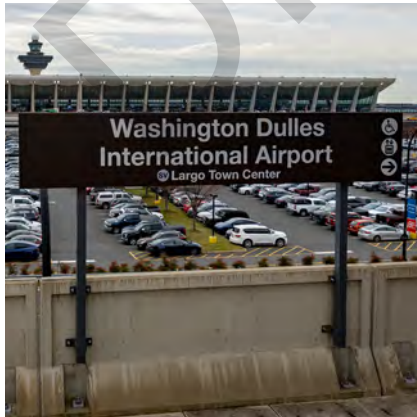
NVTC’s 2024 Legislative Forum is scheduled for Friday, December 13 at 8:30 a.m. at George Mason University’s Mason Square campus in Arlington. This event is held annually in partnership with PRTC and VRE, and this year’s event will shine a spotlight on Northern Virginia transit’s vital role within the greater Washington area, showcasing key public transportation priorities at both the state and federal levels. Confirmed panelists include Senator Jennifer Boisko, Senator Adam Ebbin, Delegate Mark Sickles, Fairfax County Board Chair Jeff McKay and moderator Nick Donohue. Stay tuned for more updates on guest speakers and program details. [Click here to register.](#)

The graphic is a promotional poster for the Annual Legislative Forum. It features a dark blue background with a faint architectural pattern. On the left, the text 'NVTC, PRTC AND VRE PRESENT:' is in green, followed by 'ANNUAL LEGISLATIVE FORUM' in large white letters. Below this, it says 'Join transit leaders and special guests for an in-person overview of federal and state issues affecting transit in Northern Virginia.' On the right, 'SAVE THE DATE' is written in large blue letters with green horizontal lines. Below that, the date and time '8:30 - 11 a.m. Friday, December 13, 2024' are listed. The location 'George Mason University Schar School Multipurpose Room 3351 Fairfax Drive, Van Metre Hall Arlington, VA 22201' is provided. At the bottom right, there are three logos: the 60th anniversary logo for NVTC (1964-2024), the Potomac & Rappahannock Transportation Commission logo, and the VRE logo.



2024

Report on the Performance and Condition of the Washington Metropolitan Area Transit Authority

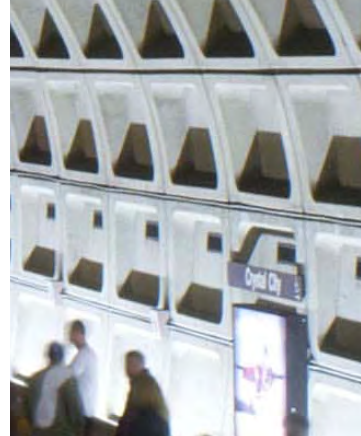


NoVaTransit.org

2300 Wilson Blvd. Suite 230

Arlington, VA 22201

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Metro System Map

wmata.com
 Information: 202-637-7000 | TTY: 202-962-2033
 Metro Transit Police: 202-962-2121 | Text: MYMTPD (696873)

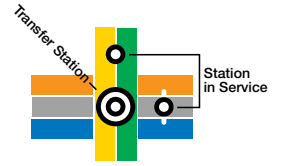
Legend

- RD** Red Line • Glenmont / Shady Grove
- OR** Orange Line • New Carrollton / Vienna
- BL** Blue Line • Franconia-Springfield / Downtown Largo
- GR** Green Line • Branch Ave / Greenbelt
- YL** Yellow Line • Huntington / Mt Vernon Sq
- SV** Silver Line • Ashburn / Downtown Largo

Station Features

- P** Parking
- H** Hospital
- A** Airport

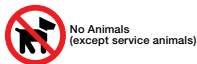
Connecting Rail Systems



Metro is accessible.

WASHINGTON METROPOLITAN AREA TRANSIT AUTHORITY © 2023

N
 Map is not to scale



Acknowledgements and Credits

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Walter Alcorn, Chair
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Legislative Requirement of This Report

This report fulfills the requirements of § 33.2-3403 of the Code of Virginia specifying that NVTC report annually on the performance and condition of WMATA, for both Metrorail and Metrobus. Per statute, the report addresses the following elements:

- Potential strategies to reduce the growth in costs and to improve the efficiency of WMATA operations.
- Use of the dedicated capital funds authorized by the legislation to improve the safety and condition of the rapid heavy rail mass transportation system.
- The safety and reliability of the rapid heavy rail mass transportation system and bus network.
- The financial performance of WMATA related to the operations of the rapid heavy rail mass transportation system and bus mass transportation system, including farebox recovery, service per rider and cost per service hour.
- The ridership of the rapid heavy rail mass transportation system and the bus mass transportation system.



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1. Introduction

In this seventh Annual Report on the Performance and Condition of the Washington Metropolitan Area Transit Authority (WMATA), the Northern Virginia Transportation Commission (NVTC) is proud to continue advancing public transit in Northern Virginia by presenting timely policy recommendations as the region develops strategies to address long-term, sustainable funding for WMATA. At varying scales and timelines, transit agencies nationwide face unparalleled budget deficits as once reliable revenue streams struggle to keep pace with increased costs as a result of the COVID-19 pandemic which upended ridership and brought historic levels of inflation across all industries.

In June 2023, WMATA announced a forecasted FY 2025 operating budget gap of \$750 million. Working closely with regional partners including NVTC and the Commonwealth of Virginia, WMATA successfully closed its operating budget gap using several budget tools, including preventive maintenance transfers, fare increases, minor service adjustments and significantly higher levels of additional jurisdictional contributions from Virginia, Maryland and the District of Columbia.

Northern Virginia jurisdictions, in partnership with the Commonwealth through its Biennium Budget, successfully crafted a two-year funding solution that ensures WMATA's continued post-pandemic ridership recovery. For FY 2025, Virginia provided an additional \$119 million and for FY 2026, an additional \$169 million, both split between local jurisdictions in Northern Virginia and the Commonwealth.

As the region collectively worked to develop a temporary funding solution, additional clarity on the post-pandemic funding needs of other transit agencies shifted the focus to finding long-term, sustainable, dedicated funding solution for WMATA and Northern Virginia's other public transit agencies. WMATA, in partnership with the Metropolitan Washington Council of Governments (MWCOCG), commenced the DMVMoves effort to identify long-term funding needs and possible funding mechanisms while Virginia's General Assembly established a Joint Subcommittee to study Virginia's share of those future needs and ways to meet them with new, potential revenues and cost containment measures.

Front and center in the regional conversations taking place regarding long-term funding are strategies to contain cost growth, as evidenced in this report. WMATA made great strides over the last year in identifying cost savings in its operating and capital budgets by reducing administrative costs, tackling fare evasion on the Metrorail system with the installation of new faregates and, perhaps most notably, the execution of the new collective bargaining agreement with Amalgamated Transit Union (ATU) Local 689 – the largest of WMATA's labor unions – featuring a wage freeze for FY 2025 and further cost controls thereafter. WMATA has communicated these cost containment measures effectively to its funding jurisdictions and the public.

Time is of the essence: WMATA faces unprecedented deficits in its operating and capital budgets should a long-term funding solution not be realized. NVTC recognizes the opportunity at hand and offers the recommendations in this report to continue advancing a better transit future for Northern Virginia and its residents who deserve a robust and well-funded public transportation network.

2. Metro Funding, Accountability and Reform Recommendations

Following the structure of the “2023 Annual Report on the Performance and Condition of WMATA”, this report builds upon NVTC’s work over the last several years and contains a series of recommendations directed to WMATA and other entities to address WMATA’s structural cost growth, operational and financial accountability, oversight, structural funding deficit as well as capital and other focus areas. Most of these recommendations are directed to WMATA, either for management or the WMATA Board’s consideration, but many are also directed to federal, state and local partners, including NVTC, who play important roles in the aforementioned areas and enable or constrain WMATA’s ability to take certain actions. At a minimum, these recommendations aim to satisfy the legislative requirement of this report to document potential strategies to reduce the growth in costs and to improve the efficiency of WMATA operations. More broadly, these recommendations are intended to offer WMATA, the Commonwealth and the region a framework for the continued regional funding and reform discussions that will take place over the next year.

Long-Term, Sustainable Funding Forums

Several key initiatives focused on a long-term financial solution for WMATA and other transit agencies in the region began this year. In May, WMATA and MWCOG launched DMVMoves, a project that seeks to develop a vision for world-class transit, identify the scale of the financial need for WMATA and other transit agencies and offer sustainable funding concepts for the region. In July, a Joint Subcommittee of Virginia’s General Assembly, formed by Senate Joint Resolution 28 (SJ 28: Northern Virginia Growing Needs of Public Transit Joint Subcommittee) in the 2024 session, began exploring new potential revenue sources to meet the growing needs of WMATA and other public transit operators in Northern Virginia.

Recommendation	Directed to	Forum
1. Continue to work with federal, state, regional and local funding partners to develop long term, sustainable, dedicated funding to meet Metro’s capital and operating needs.	VA, MD, DC and NVTC	DMVMoves, SJ 28
2. Preserve additional state aid (FY 2026) and operating cap re-baselining contained in the two-year state budget.	VA	
3. Establish a revised Virginia and Maryland legislative operating assistance growth cap.	VA, MD and WMATA Board	SJ 28
4. Sustain rail and bus service levels to continue an ongoing ridership recovery.	WMATA	
5. Establish a reserve fund and associated fiscal management policies at Metro.	WMATA Board and funding jurisdictions	
6. Return federal workers to the office and secure a replacement for the region’s losses in fares from riders using federal transit benefits.	Federal government	
7. Identify opportunities to leverage regional resources, technology and policies that benefit riders and find cost savings.	WMATA, VRE and transit agencies	DMVMoves
8. Formalize the functions and scope of a WMATA Board audit committee to enhance oversight via a coordinated jurisdictional audit.	VA, MD, DC and WMATA Board	DMVMoves

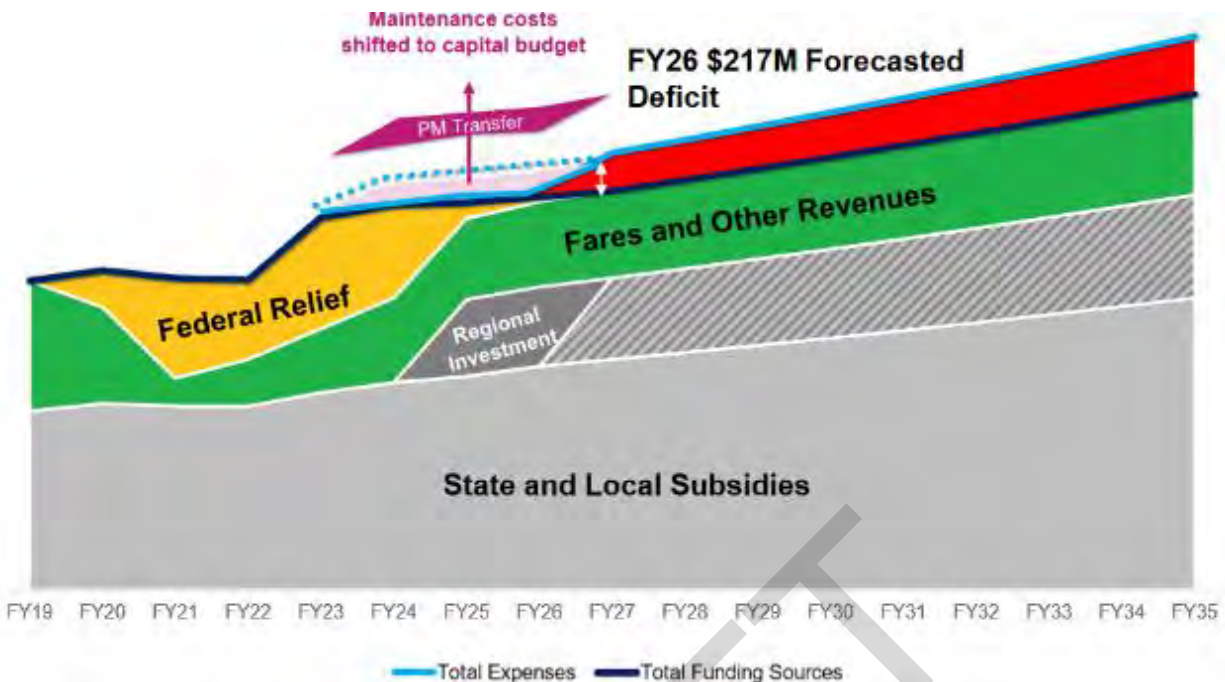
Recommendation	Directed to	Forum
<p>9. Manage labor cost escalation through reforms to pension and other post-employment benefits (OPEB).</p> <ul style="list-style-type: none"> • Increase worker contributions to pensions and OPEB to reflect national averages. • Limit or prohibit overtime earnings towards retirement pay. • Implement OIG findings to improve controls and governance and explore alternative retirement plans for new employees in the next collective bargaining process. 	WMATA and labor unions	SJ 28
<p>10. Require consideration of Metro’s fiscal condition in binding arbitration.</p>	Congress	

1. Continue to work with federal, state, regional and local funding partners to develop long term, sustainable, dedicated funding to meet Metro’s capital and operating needs.

Recommendation directed to the Commonwealth of Virginia, State of Maryland, District of Columbia and NVTC.

While the greater Metropolitan Washington region came together to address WMATA’s FY 2025 budget gap with substantial, additional investments from each funding jurisdiction, a shifting of maintenance costs from the operating budget to the capital budget, increased fares and modest service adjustments, Virginia, Maryland and the District of Columbia must continue working toward a long-term, sustainable, dedicated funding solution for WMATA’s operating and capital needs. NVTC’s primary, near-term 2023 recommendations – re-baselining operating subsidy and seeking additional state aid to help local jurisdictions meet their funding obligations to WMATA – only provide a temporary solution to WMATA’s operating funding gap. WMATA’s underlying, structural operating funding model still presents a long-term concern that must be solved if Northern Virginia and the Commonwealth are going to maintain the quality of life, economic competitiveness and ability to mitigate congestion and climate change afforded by WMATA’s presence (Figure 1).

In FY 2026, WMATA is forecasting a \$217 million deficit which is anticipated to be closed with additional jurisdictional subsidies resulting from the expiration of pandemic-era federal aid (\$95 million), preventive maintenance transfers from the capital to the operating budget (\$94 million) and one-time savings from FY 2024 (\$28 million). Virginia’s share of the additional jurisdictional subsidies for FY 2026 (\$169 million) was included in the Commonwealth’s Biennium Budget. However, beginning in FY 2027, no funding has been identified that would continue Virginia’s share – split between the Commonwealth and NVTC jurisdictions – of the additional regional investments necessary to keep WMATA’s operating budget fully funded.



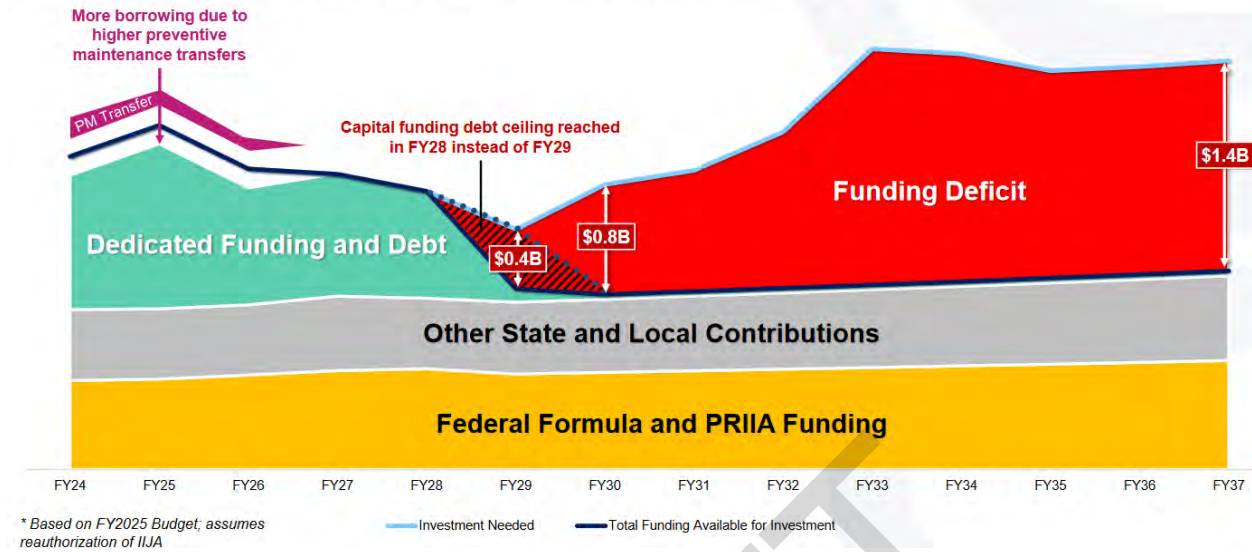
Source: WMATA, as of October 2024¹

Figure 1: WMATA Structural Operating Deficit

Beyond WMATA’s operating funding needs, a capital funding cliff looms on the horizon as dedicated capital funding bond capacity is projected to be exhausted in FY 2028 (Figure 2). WMATA has made significant progress in addressing overdue state of good repair needs, reducing the state of good repair backlog from nearly \$7 billion in FY 2016 to \$4 billion in FY 2024. Because the 2018 regional dedicated capital funding was not indexed to inflation, its value has eroded over time. Recent transfers of preventive maintenance expenses above historical averages and higher than historic levels of inflation have also accelerated the exhaustion point of dedicated capital funding bond capacity where a significant majority of the funding will go to debt service payments. While this debt ceiling is anticipated to be reached in FY 2028, WMATA is already operating in a fiscally constrained capital environment. If its capital funding deficit is not addressed, WMATA will see its state of good repair backlog grow, declining reliability, a worse customer experience and increased safety risks.

As the region explores long-term, sustainable, dedicated funding, NVTC plays a vital role by providing a forum to advance these critical conversations, providing technical expertise and coordinating a Virginia consensus position on all matters related to transit funding. Virginia, with support from NVTC, Maryland, and D.C. must remain laser-focused on developing their long-term, sustainable, dedicated funding solutions for WMATA over the next year in preparation for the FY 2027 budget process.

Dedicated capital funding borrowing capacity projected to be exhausted in ~FY2028 and new capital funding will be needed to address ongoing system safety, renewal and modernization needs



Source: WMATA, as of October 2024²

Figure 2: WMATA Capital Program Deficit

2. Preserve additional state aid (FY 2026) and operating cap re-baselining contained in the two-year state budget.

Recommendation directed to the Virginia General Assembly and Governor.

Maintaining its role as a 50-50 partner with local jurisdictions in funding WMATA, the Commonwealth of Virginia included \$60.2 million in FY 2025 and \$84.5 million in FY 2026 in additional state aid to help close WMATA’s operating budget shortfall.³ As this funding is matched by NVTC jurisdictions, this additional funding collectively represents Virginia’s commitment to the region in funding WMATA. As Virginia operates on a two-year budget cycle, it will be critical to NVTC’s local jurisdictions that the General Assembly and Governor preserve the \$84.5 million in additional state funding for FY 2026. Without this substantial commitment from the Commonwealth in FY 2026, Northern Virginia jurisdictions would be forced to face closing the operating gap on their own, potentially requiring severe service cuts and jeopardizing matching funding from regional partners in DC and Maryland.

Virginia’s biennial budget also included language that temporarily suspended (for FY 2025 and FY 2026) the 3% cap on year-over-year growth in the Commonwealth’s subsidy allocation. The 3% cap, described in detail below, was implemented in FY 2020 as a cost containment tool for WMATA and a means to provide stability and predictability to Northern Virginia jurisdictions regarding annual subsidy payments. WMATA has aggressively managed its expenses, and it was able to defer and utilize \$95 million in pandemic relief funding in FY 2025 budget.⁴ Since this funding will not be available in FY 2026, additional jurisdictional subsidies will be required to offset this pandemic relief funding. It is therefore essential to not only preserve the additional \$84.5 million in state aid but also maintain a suspended 3% cap through FY 2026 as the region develops a long-term funding solution.

3. Establish a revised Virginia and Maryland legislative operating assistance growth cap.

Recommendation directed to the Commonwealth of Virginia, State of Maryland and WMATA Board.

Virginia's 3% cap on the increase in annual operating assistance to WMATA was included as part of the 2018 dedicated capital funding legislation.⁵ Maryland implemented a nearly identical cap at the same time, while the District of Columbia has no cap on growth in operating assistance to WMATA. When the cap was implemented, WMATA had a pre-pandemic financial model of relatively high farebox revenues (over \$700 million in fare revenues in FY 2019) and low inflation (below 3%). While the 3% cap has been an effective tool in controlling WMATA's cost growth as evidenced by the agency's 4.8% average annual operating budget growth from FY 2019 to FY 2024 (lower than the regional peer average of 7%), several unintended consequences from the implementation of the cap arose that affect Virginia.⁶

Specifically, the 3% cap altered WMATA's subsidy allocation process in a way that distorted the amount of subsidy owed from the amount of service received, reducing transparency and accountability to the funding jurisdictions in the budget process. The 3% percent cap is the primary driver, in addition to an outdated Metrobus subsidy allocation formula, behind why Virginia has paid more for Metrobus service while getting less service.⁷ As a result of this disconnect, Virginia paid more in fiscal years 2022 through 2024 via the 3% cap allocation than would have been required if the traditional formula allocation were run under those circumstances. As WMATA is a regional system, it is not possible to cap one jurisdiction's operating subsidy growth without directly or indirectly capping the entire system. Addressing these unintended consequences is important because NVTC jurisdictions need to understand the true costs of WMATA services so they can make informed decisions about local bus and/or paratransit services.

Through the "2023 Metro Operating and Reform Working Group Report," NVTC and its jurisdictions found that the cap is a useful tool, but it should be revised to accommodate a new post-pandemic financial model and to resolve its unintended consequences. While Virginia has suspended the cap for two years, Maryland has suspended the cap for three years. With the cap remaining suspended in FY 2026, it will be necessary to maintain ongoing coordination and engagement with Maryland, the Commonwealth and WMATA to develop a mechanism that can effectively contain cost growth into the future.

4. Sustain rail and bus service levels to continue an ongoing ridership recovery.

Recommendation directed to WMATA.

WMATA is in the middle of a sustained and gradual post-pandemic ridership recovery for both bus and rail, with 42 consecutive months of ridership growth year-over year. Metrorail saw 123.3 million trips in FY 2024, representing a 27% increase over FY 2023 and a 64% recovery relative to 2019 levels. Metrobus meanwhile saw 117.5 million trips which was 15% higher than FY 2023 and 96% of 2019 levels. Metrobus leads the nation in ridership recovery, and Metrorail had the fastest ridership growth in the last 12 months among 40 of the world's biggest rail system. WMATA should sustain its service levels as ridership continues to grow in Virginia and across the region.

As a cost saving measure, WMATA implemented targeted rail service adjustments in FY 2025 by scheduling peak service periods to align with ridership levels, operating more six-car trains where they could provide sufficient capacity, earlier opening for Metrorail on weekends, and reduced service on select holidays where historical ridership was relatively lower. However, as ridership has

continued to grow, crowding on Metrorail and Metrobus grew, especially during peak periods and along key bus corridors such as the 18P and 16Y. WMATA should look for opportunities to address crowding with more eight-car trains, extra trips for special events, more buses in busy corridors and opening Metrorail earlier on weekends to support workers and those traveling to the region's airports. Looking ahead, WMATA's Year 1 Better Bus Network is scheduled to be implemented toward the end of FY 2025.⁸ This Year 1 Network presents an exciting opportunity to reach new communities with better restructured service, continuing to attract more riders while finding system efficiencies.

5. Establish a reserve fund and associated fiscal management policies at Metro.

Recommendation directed to the WMATA Board and funding jurisdictions.

Unlike most peer transit agencies or state and local governments in Virginia, WMATA does not have an operating contingency reserve fund. This means that WMATA is poorly positioned to handle unpredictable financial shocks and in those circumstances is reliant on its funding jurisdictions, who have placed (albeit temporarily suspended) an operating assistance cap on WMATA, to weather these unforeseen circumstances. Since WMATA does not have dedicated operating funding, the funding jurisdictions all appropriate funding to WMATA through their annual budget processes. An unforeseen ask of WMATA to its funding jurisdictions creates budgetary unpredictability that is challenging for all parties and could present legal difficulties with the legislative operating caps. In addition, an operating contingency reserve fund is an example of sound financial management, which bond ratings agencies look for in evaluating agencies in rating their bonds. Sound financial management is a critical component in achieving a higher bond rating, which could save WMATA and its funders valuable capital dollars.

As part of its oversight role to WMATA, the WMATA Board should establish a Board directed operating contingency reserve fund and adopt management policy for fund that sets parameters and policy for WMATA staff to follow. A rainy-day fund was identified in WMATA's 2019 strategic plan, "Keeping Metro, Safe, Reliable, and Affordable," but was not implemented by the region.

6. Return federal workers to the office and secure a replacement for the region's losses in fares from riders using federal transit benefits.

Recommendation directed to the Federal Government.

Prior to the pandemic, federal employees were the backbone of WMATA's ridership and fare revenue, accounting for approximately 40% of WMATA's daily commuters. WMATA estimates that it received \$100 million in fare revenue from federal employees in FY 2019. Since 2020, federal employee ridership recovery has lagged behind other customers returning to WMATA. Each additional day per week that federal employees ride WMATA services represents an additional \$20 million in annual fare revenue. If federal employee ridership were to return to prior levels, WMATA would receive approximately \$50 million in additional fare revenue in FY 2025.

Federal agencies continue to budget for and provide transit benefits to their employees which provide a tremendous incentive for federal employees to ride transit to work. These transit benefits are used across the major transit providers in the region: WMATA, MARC, VRE, OmniRide and other local transit agencies. Transit agencies only receive this revenue if federal employees ride and tap to pay their fare. The significant expansion of telework among federal employees has greatly reduced their use of WMATA and transit in general, and unused transit benefits are recouped by each respective agency.

NVTC encourages federal return-to-office policies that encourage transit use throughout the work week and for the federal government to secure a replacement for the region's losses in fares from riders using federal transit benefits.

7. Identify opportunities to coordinate transit technology and associated policies across the region to benefit riders and find cost savings

Recommendation directed to WMATA, the Virginia Railway Express and transit agencies.

As NVTC, the Commonwealth and the broader Washington, D.C. region identify new potential revenue streams to support public transit, it is important to identify opportunities for streamlining and cost savings. The DMVMoves initiative, as well as transit agency and government staff-level conversations hosted by NVTC, began discussing concepts to advance low-cost, high-impact policies that would better serve the region's transit users. NVTC supports the following strategies that can provide a more seamless customer experience and potentially offer cost savings through joint procurement:

- Integrating and aligning fare policies to provide seamless customer experience.
 - While all bus agencies in Northern Virginia that currently charge fares participate in SmarTrip, offering a seamless fare payment experience with WMATA, our region's bus agencies are not currently included in WMATA's rail pass products. The WMATA Board approved the inclusion of local bus agencies in WMATA pass products in 2021, pending a revenue sharing agreement between providers.
- Accelerating back-office upgrades to ensure SmarTrip is capable of handling emerging fare products and policies, such as fare capping, and being a viable option for commuter rail transit agencies.
 - Fare capping gives frequent riders the savings of a monthly, weekly or daily pass without having to pay the full cost of that pass up front. It is automatically applied after a rider has spent a certain amount over a given time period, ensuring that all riders are able to take advantage of existing pass discounts through a pay as you go model.
- Coordinating among regional partners to enhance real-time bus information, including integration and technical support, across transit agencies.
- Ensuring that the installation and implementation cost for new transit technologies is the same on a per bus basis across all agencies.

While joint procurement already exists with WMATA and all transit agencies in the Commonwealth, Northern Virginia transit agencies should continue to explore opportunities to participate in joint procurements that find cost efficiencies and improve a seamless customer experience while maintaining local agency autonomy.

8. Formalize the functions and scope of a WMATA Board audit committee to enhance oversight via a coordinated jurisdictional audit.

Recommendation directed to the Commonwealth of Virginia, State of Maryland, District of Columbia and the WMATA Board.

WMATA, as a federally funded public transit agency, is subject to a number of audits and oversight efforts by external organizations. For example, congressionally mandated oversight actions are guided by and/or directly conducted by the Federal Transit Administration and include procurement,

asset management and financial management oversight. WMATA also has an independent OIG and an internal function for quality assurance, internal compliance and oversight.⁹ The funding jurisdictions of the WMATA Compact exercise oversight through their WMATA Board members, and the funding jurisdictions also have the right to conduct audits of WMATA. In any organization, it is important to have the appropriate controls in place to ensure that staff are following the proper procedures. Auditing is a vital component of oversight and, in a complex funding and governance structure like WMATA, the funding jurisdictions have a role to play in auditing areas of jurisdictional concern, namely WMATA's jurisdictional subsidy and budget process.

In the past these kinds of jurisdictionally directed audits typically covered the subsidy allocation process. For WMATA, audits directed by individual funding jurisdictions have historically been intermittent and lacked coordination among the other Compact funding jurisdictions. At present, jurisdictional audits lack consistent objectives, do not share the same scope of work and have the potential to yield different findings with conflicting recommendations. Multiple uncoordinated audits also pose an additional administrative burden for WMATA, who must spend staff time responding to jurisdictional audits which often ask for the same information.

As conversations on the topic advance at DMVMoves, NVTC recommends the funding jurisdictions exercise their audit rights in a coordinated fashion that adds value and minimizes WMATA's administrative burden. To accomplish this, one option is for the WMATA Board to create an advisory committee (which is allowable per the WMATA Compact and would require either action by the Board or amendments to the WMATA Board Bylaws) composed of key regional financial staff. This advisory committee would represent a steering committee of jurisdictional interests in any audit effort that could be managed by WMATA staff. As part of this effort, the WMATA Board could formalize its already active and ongoing audit activities by amending its bylaws accordingly and assigning the audit committee the responsibility to liaise with a new jurisdictional audit committee.

9. Manage labor cost escalation through reforms to pension and other post-employment benefits (OPEB).

Recommendation directed to WMATA and labor unions.

WMATA made significant progress in managing labor cost escalation in early FY 2025 by negotiating and executing a new four-year (FY 2025 to FY 2028) collective bargaining agreement (CBA) with Amalgamated Transit Union (ATU) Local 689, the largest of WMATA's labor unions.¹⁰ The CBA stipulates a wage freeze for the first year (matching the wage freeze for non-represented employees) while years two and three provide for a 3.0% general wage increase and year four includes a 3.5% wage increase. While no cost-of-living adjustment (COLA) is provided in the first year of the agreement, years two through four will see a COLA paid only if the Consumer Price Index for Urban Wage Earners and Clerical Workers (CPI-W) exceeds the general wage increase for the relevant year up to a maximum combined total increase of 5.0%. Other CBA provisions include a limit for hours worked to align with industry standards, enhanced healthcare benefits and elimination of the work train (which carried station managers to and from their assigned locations before station open and after close). Elimination of the work train allows for WMATA to more efficiently conduct railway maintenance during the overnight maintenance window.

While the new CBA with ATU Local 689 made progress in controlling cost growth through wages, there remains opportunities to address longstanding issues with pension and other post-employment benefits. Prior reports on WMATA, like the *Review of Operating, Governance, and Financial*

Conditions at the Washington Metropolitan Area Transit Authority authored by former Transportation Secretary Ray LaHood in 2017 (“2017 LaHood report”), found that WMATA’s hourly labor costs are mostly average when compared to large peer transit agencies but recommended several areas to manage costs and increase productivity in labor contracts that remain largely unfulfilled today.¹¹

- **Increase worker contributions to pensions and OPEB to reflect national averages**

The 2017 LaHood report found that WMATA’s unionized workers contribute about 3% of pay towards their pension, which is well below the national average for workers with similar pensions.¹²

- **Limit or prohibit overtime earnings towards retirement pay.**

The 2017 LaHood report found that WMATA counts workers’ overtime earnings toward retirement benefits with no cap, which many other agencies either cap or prohibit.¹³

- **Implement OIG findings to improve controls and governance and explore alternative retirement plans for new employees in the next collective bargaining agreement.**

In 2022, WMATA’s OIG found that improvements were needed in governance of WMATA’s defined benefit pension plans and that examination of alternative retirements for new employees was needed. WMATA staff agreed with the findings and recommendations of this investigation and noted that it would need to be addressed in the next round of collective bargaining, which is currently in progress.¹⁴

Beyond improvements to pension management and OPEB in collaboration with labor unions, WMATA also has significant opportunities to control labor costs through reducing overtime hours and more closely aligning overtime expenses with budgeted amounts. In FY 2023, overtime expenses were 91% over budget and totaled \$169.6 million.¹⁵ Through the third quarter of FY 2024, overtime pay comprised 10% (\$113.4 million) of personnel expenses and were 42% over budget.¹⁶ WMATA budgeted for \$118.7 million for overtime expenses in its FY 2025 budget which represents a 21.3% increase from FY 2024 budgeted levels but significantly less than actual expenses in FY 2024. The inclusion of limits to overtime in the recent CBA offers WMATA an opportunity to continue managing overtime expenses.

10. Require consideration of Metro’s fiscal condition in binding arbitration.

Recommendation directed to Congress.

CBAs are negotiated between management and labor, and if both parties agree, the result is called a negotiated CBA. If both sides cannot agree, then the WMATA Compact calls for both parties to enter binding arbitration, where, if negotiations continue at an impasse, an arbitration panel will determine the outcome.¹⁷ The National Capital Area Interest Arbitration Standards Act of 1995, known as the “Wolf Act,” governs the actions of arbiters in labor disputes involving transit agencies operating in the national capital area.¹⁸ WMATA has found that in prior cases the arbiter has not adequately considered WMATA’s financial capacity. While not often used, amending the Wolf Act to require consideration of WMATA’s fiscal condition as part of the arbitration process is an important long-term component in resolving the long-term structural operating gap that WMATA faces.

Ongoing Efforts and Accomplishments at WMATA

The recommendations in this report offer WMATA and the region strategies to address long-term funding, cost containment and growing revenues. Over the last six years, NVTC through its annual report has advocated for a series of strategies to reduce the growth in costs and to improve the efficiency of WMATA operations. The efforts and accomplishments in this section offer insights into how WMATA has been responsive to NVTC's recommendations over time.

Ongoing Efforts and Accomplishments at WMATA

1. Communicate the results of efforts to find cost savings and efficiencies.
2. Continue to increase non-fare revenues.
3. Mitigate and report on the occurrence and fiscal impacts of fare evasion.
4. Redesign the Metrobus network to find efficiencies and cost savings.
5. Update the way WMATA allocates Metrobus subsidies.
6. Continue to enhance the physical safety and security of customers.
7. Continue efforts to improve transparency and reporting.

1. Communicate the results of efforts to find cost savings and efficiencies.

WMATA has made significant progress in demonstrating its commitment to reducing costs and finding savings in the areas it can control. A critical means to provide confidence to its funders, WMATA has communicated the ways in which it has sought cost savings both in its FY 2025 budget process and thereafter, including to the General Assembly's SJ 28 Joint Subcommittee.¹⁹

In its FY 2025 budget, WMATA found \$113 million in administrative efficiencies, comprised of \$25 million in recurring savings in its capital budget, \$38 million through a salary and wage freeze in its operating budget and \$50 million recurring savings resulting from a Cost Efficiency Task Force that lowered costs through call center consolidation, reductions in consulting services, digital transformation and improved asset management.²⁰

In FY 2024, WMATA made progress in installing new, higher fare gates at all 98 Metrorail stations and 1,500 new fare boxes on its buses which both provide opportunities to capture more revenue. The FY 2025 budget includes targeted service reductions on holidays, adjusting peak service to align with ridership and operating more six-car trains. The Better Bus Network will bring efficiencies on the bus side by increasing ridership with without additional costs.²¹

WMATA has also shared strategies the agency is pursuing to continue to advance cost savings through technology, space efficiency, procurement and operations such as automatic train operation and returning to design speeds across the Metrorail system.

2. Continue to increase non-fare revenues.

Non-fare revenues account for a small portion of operating revenues for transit agencies in the U.S. yet offer a useful tool to lower the required subsidy. In FY 2025, WMATA's non-fare revenues were budgeted to account for 4.3% of operating expenses and totaled \$100.5 million.²² Non-fare revenues for WMATA include joint development projects, advertising, parking, fiber optics, property leases and other non-transit revenues.

WMATA has one of the most robust joint development programs in the U.S. among transit agencies. However, unlike most joint development efforts elsewhere, WMATA's program raises minimal revenues directly for its operating budget. The localities in which joint development projects occur benefit from increases in property tax revenues among other benefits. As of 2022, WMATA completed 55 joint development projects that collectively generate \$194 million in annual state and local tax revenue and close to five million additional Metro trips annually.²³ Completed joint development projects accumulate between \$8-22 million in annual lease revenue to WMATA.²⁴ In FY 2024, WMATA approved two more joint development agreements, opened three solicitations and received four unsolicited proposals in addition to beginning construction on three projects.²⁵ WMATA should continue to expand joint development as well as advertising and parking revenues by utilizing its 10-Year Strategic Plan for Joint Development and growing ridership trends. Jurisdictional partners play a role in expanding joint development by providing supportive land use and zoning tools and policies, investing in site infrastructure and providing other incentives.

WMATA should explore procurable revenue driving options such as physical and data infrastructure. Land is WMATA's most valuable physical asset and while progress have been made through the various joint development projects over the years, there is an opportunity to convert underutilized parking lots not slated for joint development. WMATA could lease or rent parking spaces to fleet operators, to tour bus companies or for special events on weekends. WMATA's most valuable data comes from SmarTrip cards and accounts. There are six million SmarTrip cards in circulation²⁶ and the SmarTrip app generates valuable information to advertisers and can be monetized. There will be many factors to consider like ensuring this effort does not violate privacy policies, but there is potential in this space to create a revenue stream for WMATA.

3. Mitigate and report on the occurrence and fiscal impacts of fare evasion.

Enforcing fare payment is critical to creating a safe, secure and financially sustainable transit system. Along with the sharp decline in ridership during the pandemic, WMATA also saw an increase in fare evasion. Between January 2023 and June 2023, average monthly percentage of Metrorail riders who evade the fare hovered near 12%, but this figure dropped to 9% in FY 2024 (12.6% in Maryland, 8.9% in the District of Columbia and 5.3% in Virginia) and continued to fall to just under 4% in early FY 2025.²⁷ This was achieved by fare enforcement and the installation of new, higher fare gates across the entire Metrorail system in FY 2024 which led to an 82% drop in fare evasion.²⁸

WMATA also installed new fareboxes on 1,500 buses, replacing many malfunctioning fareboxes that did not offer the ability to pay even for riders who wanted to. As of September 2024, MTPD issued over 10,000 fare evasion citations, arrested more than 250 individuals stopped for fare evading and found to have open warrants and recovered 16 guns in the calendar year.²⁹ While progress is being made on fare evasion on Metrorail, fare evasion on Metrobus approaches 70% system wide, which is

nearly double the 34% system wide fare evasion rate that occurred between July 1, 2021 and December 31, 2021.³⁰

The Metro Transit Police Department (MTPD), not bus operators or station managers, is responsible for enforcing fare payment, and MTPD must follow the fare evasion laws of each respective state or local government within which they operate. These laws vary from a civil or a criminal offense in Virginia and Maryland jurisdictions, depending on the city or county. While the pandemic accelerated fare evasion trends, increasing levels of fare evasion were underway due to the policy changes in the District.

Fare enforcement policy in the District of Columbia has varied greatly over the last five years. In the District of Columbia, fare evasion was a criminal offense until the District decriminalized fare evasion to a civil offense in 2019. Between 2019 and 2022, fare evasion in the District was unenforceable by MTPD because the District had not completed an adjudication process to allow MTPD to enforce fare evasion as a civil fine. When fare enforcement restarted in November 2022 after the completion of this process, MTPD could engage an individual in the District who did not pay the fare but were unable to compel compliance, severely limiting enforcement efforts.³¹ With the passage of the Secure DC bill in 2024, MTPD has been able to require those stopped for fare evasion to provide their true name and address, allowing officers to issue civil citations.

WMATA should continue to report on the occurrence and fiscal impacts of fare evasion so that the WMATA Board, funding partners and policymakers can make informed policy decisions. NVTC recommends WMATA provide periodic briefings to the Finance and Capital Committee on the fiscal impacts of fare evasion by mode and by jurisdiction. In the fall of 2023, WMATA began providing data on the occurrence of fare evasion on Metrorail on its public data portal.³² NVTC encourages WMATA to extend this commitment to transparency on fare evasion data on Metrobus.

4. Redesign the Metrobus network to find efficiencies and cost savings.

Historically, Metrobus and Metrorail have operated as two separate systems.³³ This was driven by relatively low fares for Metrobus, a partial transfer discount that penalized transfers between bus and rail and policy decisions by the region and the WMATA Board that intentionally operated Metrobus routes that duplicated Metrorail service. The 2017 LaHood report recommended a comprehensive reset of the Metrobus system that re-examines the entire system of bus routes, schedules and operating practices to find efficiencies, save money and improve service.³⁴ WMATA began a comprehensive redesign process with the launch of the Better Bus Network Redesign³⁵ in the fall of 2022, which aims to build a more efficient bus network for Metrobus in collaboration with regional transit agencies.

In 2023, the Better Bus Network Redesign developed a draft visionary network toward which the region could grow incrementally as resources become available. In 2024, WMATA began engagement with the region on a resource-neutral Better Bus Year One Network that offers the WMATA Board the opportunity to achieve the goals set out in the LaHood report. With a fully funded transfer discount between bus and rail, the Bus Network Redesign can allow WMATA to move from two siloed transit systems into a more integrated transit system. As of fall 2024, WMATA intends to begin implementation of the Year One Network in late FY 2025.

5. Update the way WMATA allocates Metrobus subsidies.

Since its founding, WMATA has used a subsidy allocation formula to determine how costs to operate Metrobus service are allocated among the Compact funding jurisdictions. The Metrobus service network has changed significantly since the last formula update in 1998, and it has changed even further with recent changes during and after the COVID-19 pandemic. The underlying fundamentals of the current formula have created a broken system that is inconsistent and unpredictable to partners, provides distorted incentives around service provision, inhibits the use of external grant sources to pay for service disincentivizes jurisdictions from taking action on fare evasion, and makes targeted service changes and how they are paid for unnecessarily complex and fraught with veto points. The 3% operating subsidy cap has exacerbated many of these issues and significant Metrobus service changes since the pandemic have resulted in an even greater distortion between service provision and individual jurisdictions' subsidies.

The WMATA Board began discussions on developing new subsidy allocation formulas for both Metrobus and Metrorail in summer 2024. An update to the Metrobus subsidy allocation formula is a critical component of the Better Bus Network Redesign effort currently underway. NVTC recommends that the WMATA Board adopt and implement new Metrobus and Metrorail subsidy allocation formulas that better link the amount of service with the amount of subsidy as soon as practicable.

6. Continue to enhance the physical safety and security of customers.

WMATA and the Metropolitan Transit Police Department (MTPD) have implemented specific crime-reduction strategies to address crime and disorder within the entire WMATA system.³⁶ Specifically, these include increased police visibility, enforcement activities, local partnerships, enhanced community relations programs and the continued Problem-Oriented Policing approach to address crime and public safety. In February 2023, District of Columbia Mayor Muriel Bowser and WMATA General Manager Randy Clarke announced a joint partnership between MTPD and the DC Metropolitan Police Department to increase police presence throughout the WMATA system, particularly during rush hour.³⁷

MTPD has hired crisis intervention specialists who are deployed daily throughout the system, with priority locations driven by police data. The crisis intervention team adds more visibility to the system, conducts wellness checks and provides resources to customers experiencing a mental health crisis.³⁸ In addition, all MTPD officers carry naloxone, a lifesaving drug to prevent death and drug overdoses.³⁹ WMATA also holds monthly Youth Advisory Council Meetings and pop-up events in the community and delivered 210 anti-theft steering wheel locks.⁴⁰ In FY 2024, WMATA deployed over 100 special police officers on trains and platforms, had its Crisis Intervention Specialists handle over 11,800 interactions and held over 730 community outreach events in partnership with local police agencies.⁴¹ As a result of these efforts, Part I crime (larceny, motor vehicle theft, robbery, aggravated assault) fell 14% between FY 2023 and FY 2024.

WMATA should continue its focus on enhancing safety and security efforts by engaging the community, targeting enforcement efforts and increasing police visibility on buses and trains and in stations as well as continuing partnerships with local jurisdictions to tackle crime on the system.

7. Continue efforts to improve transparency and reporting.

Since 2018, WMATA has provided or improved upon data and reporting, most notably through the following:

- Capital Program Documents: Quarterly Capital Improvement Plan (CIP) Progress reports, Capital Needs Forecast, Detailed CIPs, etc.⁴²
- Ridership Data Portal: Metrorail, Metrobus, and parking ridership data, trends, and snapshots, including tap and no-tap data for Metrorail.⁴³
- MetroPulse: An interactive web tool that provides real-time customer info and system performance data.⁴⁴
- Financial and Performance Quarterly Reports: Improvements to the quality and quantity of Quarterly Financial reports and Performance reports.⁴⁵
- Metrobus Annual Line Performance Report: reporting on the performance of bus service against the metrics in the Metrobus Service guidelines.⁴⁶
- Open Data Hub: links to interactive dashboards, performance reporting, downloadable data and guidance on how to get the most out of Metro's data resources.⁴⁷

Through legislation, grant agreements, and Board direction, WMATA provides a great deal of reporting to federal, state, regional and local stakeholders. NVTC recommends that WMATA continue its ongoing efforts to improve transparency and reporting. NVTC suggests that WMATA continue publishing information in open data portals, as this promotes transparency and can reduce the administrative burden of generating reports. When compared to peers, an area for improvement is for WMATA to continue making its website more user-friendly for the volume of reports and data it generates. New York MTA's website provides a peer example with a transparency landing page that consolidates performance data and related information.⁴⁸

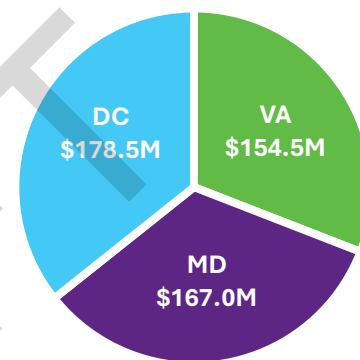
3. Use of Dedicated Capital Funds

In 2018, the Commonwealth of Virginia, the State of Maryland and the District of Columbia worked together to commit \$500 million a year in dedicated funding for capital investments at WMATA. Virginia's annual portion of this dedicated capital funding is \$154.5 million, with the District of Columbia and State of Maryland providing the remaining portions. While this dedicated capital funding strengthens WMATA's ability to embark on large, multi-year capital investments designed to address significant state of good repair needs, it is not inflation adjusted and has seen its purchasing power eroded over time, contributing to WMATA's pending capital program funding cliff. WMATA provides detailed reporting and information about its capital program on its website.⁴⁹

WMATA's Capital Fund

The WMATA Capital Fund is Virginia's share of regional dedicated capital funding that was established in 2018. Virginia's dedicated capital funding supports WMATA's capital investments and project delivery across the system and can be used for any capital purpose. Of the \$154.5 million from Virginia, most of the funding is bondable and is provided to an unrestricted account at WMATA. Funding that is not bondable is provided to a restricted account at WMATA. The WMATA Capital Fund is established in and protected by state code. DRPT manages and provides the funding directly to WMATA through a grant agreement that ensures a predictable and reliable flow of funding.⁵⁰

Regional Share of the \$500 Million in Dedicated Capital Funding



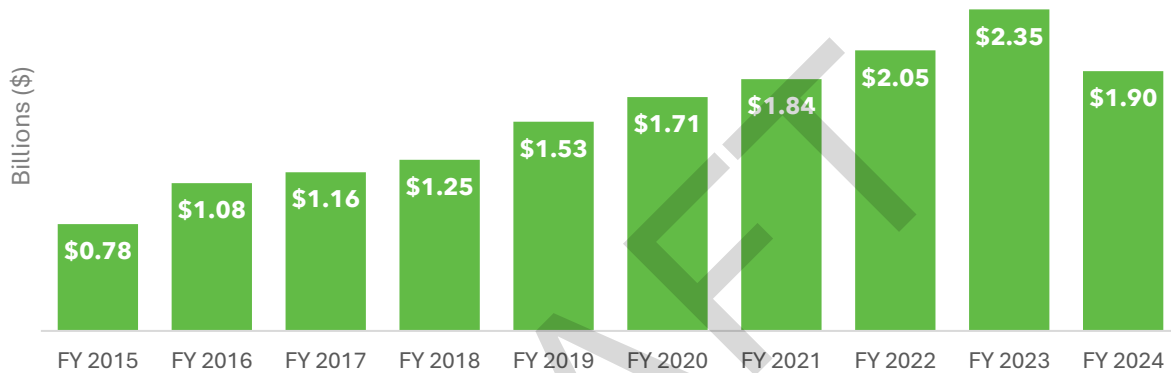
Sources of Revenue

The WMATA Capital Fund is managed by DRPT and is primarily comprised (about 80%) of local revenues or regional revenue streams generated from the Northern Virginia Transportation District. On an annual basis, the WMATA Capital Fund consists of the following sources:

- **Local Support:** The cities of Alexandria, Fairfax and Falls Church and the counties of Arlington, Fairfax and Loudoun directly contribute a total of \$27.12 million in local funding directly to DRPT. The allocation of the \$27.12 million between the cities and counties is determined by their respective shares of WMATA's capital budget.
- **Regional Gas Tax:** A fixed portion, \$22.183 million, of the regional gas tax in the Northern Virginia Transportation District is directed to the WMATA Capital Fund.
- **Regional Grantors Tax and Regional Transit Occupancy Tax:** Within the Northern Virginia Transportation District, the revenues created by a 3% transient occupancy tax and \$0.10 per \$100 of assessed value grantor's tax are directed to the WMATA Capital Fund. These sources are revenue streams, so they do not provide a fixed amount into the fund.
- **Restricted Account:** This account is not bondable and is comprised of state funds. It includes a fixed \$20 million in state-wide recordation taxes from the Northern Virginia Transportation District Fund and a portion of the state-wide Motor Vehicle Rental Tax.

WMATA’s Capital Program

In FY 2016, WMATA’s overdue state of good repair needs were estimated at \$6.5 billion and were estimated to drop to \$4.1 billion by FY 2024.⁵¹ Over the last decade, however, WMATA ramped up its annual capital expenditures to deliver major construction projects that address the state of good repair backlog and other modernization needs. With a sustained focus on capital renewal made possible by the ability to issue bonds backed by dedicated capital funding, WMATA has more than doubled its capital expenditures to a record high \$2.35 billion in FY 2023 before a drop to \$1.9 billion in FY 2024 (Figure 3).⁵²



Source: WMATA Capital Improvement Program Progress Report Fiscal Year 2024 Quarter 4

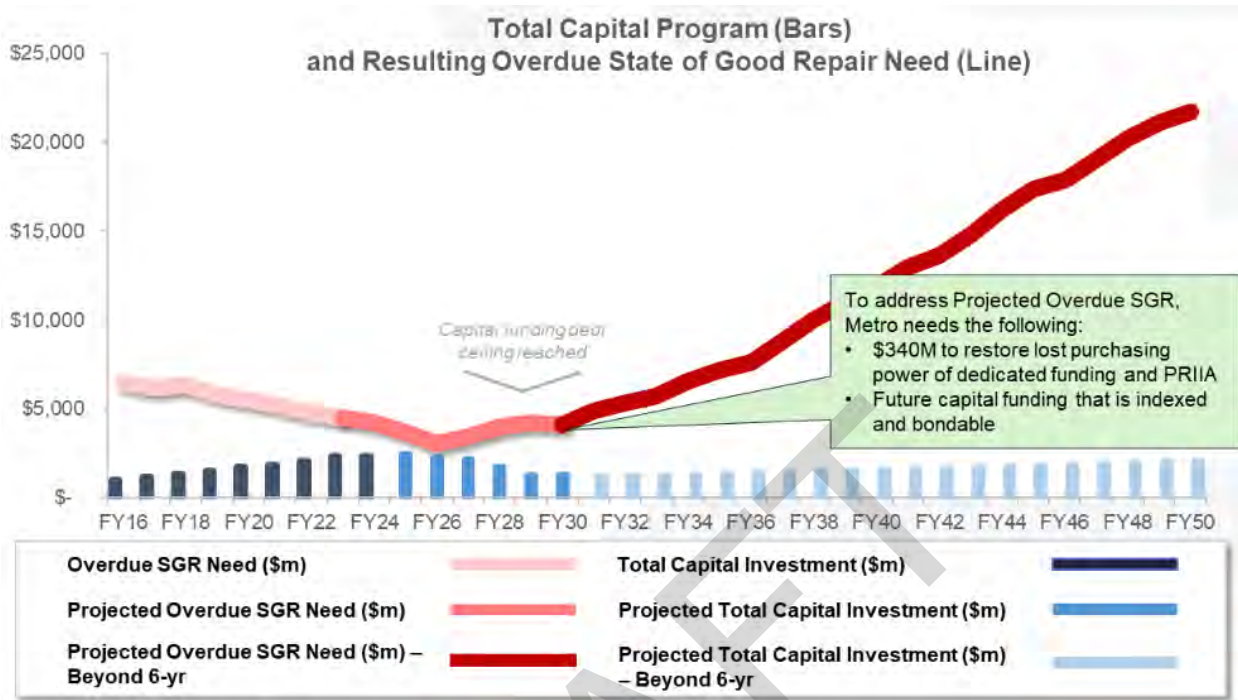
Figure 3: WMATA Annual Capital Expenditures from FY 2015 to FY 2024

Since the funding’s inception, WMATA has authorized over \$3.6 billion in dedicated capital funding bonds, which will be paid for with current and future dedicated capital funding revenues.⁵³ Dedicated capital funding debt capacity is anticipated to be exhausted by FY 2028. At this exhaustion point the dedicated funding revenue streams will be almost entirely allocated to paying debt service and will not be able to support further state of good repair and modernization work in the capital program.

Although WMATA is not projected to reach its debt ceiling until FY 2028, limited future capital funding has an impact on the agency’s current capital budget. WMATA’s current, proactive approach within its capital approach enabled planning for asset replacement before failure. Without additional funding to support the capital program, WMATA will be forced to return to a reactive approach – as was done before the 2018 Dedicated Funding Agreement – which will require corrective maintenance actions. After FY 2028, WMATA would see its overdue state of good repair needs grow significantly after a steady decline from FY 2016 to FY 2024 (Figure 4).

WMATA uses several sources to fund its capital program including federal funding, regional dedicated funding, state and local contributions and other sources. As required by law, NVTC must include the uses of funds from the WMATA Capital Fund (Virginia’s share of the dedicated capital funding) from the prior fiscal year in this report. Table 1 shows the actual expenditures of the fund for FY 2024 by Capital Improvement Plan (CIP) Program Area attributable to Virginia’s portion of the dedicated capital funding. WMATA provides additional information on progress made in the overall capital

program during FY 2024 in WMATA's Quarter 4 FY 2024 Capital Improvement Program Progress Report.⁵⁴



Source: WMATA Finance and Capital Committee Presentation, October 24, 2024

Figure 4: Forecasted Capital Program Deficit Threatens State of Good Repair Progress

Table 1: FY 2024 Expenditures from the Virginia WMATA Capital Fund by CIP Program

CIP Category	CIP Program	FY 2024 Expenditures (millions)
Railcar Investments	Acquisition	\$0.2
	Maintenance/Overhaul	\$31.2
	Maintenance Facilities	\$0.8
	Subtotal	\$32.2
Rail System Investments	Power	\$4.5
	Signals & Communications	\$10.0
	Subtotal	\$14.4
Track and Structures Rehabilitation Improvements	Fixed Rail	\$10.2
	Structures	\$2.8
	Subtotal	\$12.9
Stations and Passenger Facilities Investments	Platforms & Structures	\$5.6
	Vertical Transportation	\$1.0
	Station Systems	\$15.5
	Subtotal	\$22.0
Bus and Paratransit Investments	Acquisition	\$0.6
	Maintenance/Overhaul	\$6.9
	Facilities	\$0.1
	Passenger Facilities/Systems	\$1.4
	Subtotal	\$9.0
Business Support Investments	Information Technology	\$10.6
	MTPD	\$0.2
	Support Equipment/Services	\$10.5
	Subtotal	\$21.4
Total Virginia Dedicated Funding expended through June 30, 2024		\$112.0
FY 2024 Dedicated Funding expended		\$102.7
Prior Year Dedicated Funding expended		\$9.2
Debt Service		\$51.0
Remainder of FY 2024 Dedicated Capital Funding expended after FY 2024		\$0.7
Total FY 2024 Virginia Share of Dedicated Funding		\$154.5

Source: WMATA Quarter 4 FY 2024 Capital Improvement Program Progress Report

Note: Totals may not add due to rounding. Due to the timing of the publication of this report, these expenditures are preliminary and do not represent final audited expenditures.

In FY 2024, WMATA invested \$1.9 billion in capital projects with a priority to invest in state of good repair projects. Significant FY 2024 capital accomplishments supported by dedicated capital funding included:

Station and Passenger Facilities Investments

CIP program category: Stations and passenger facilities

WMATA made significant progress across several efforts in FY 2024 related to station and passenger facilities. WMATA completed installation of over 1,500 new fareboxes on buses and new fare gates at all 98 stations across the Metrorail system. Each Metrorail station now has more secure, retrofitted faregates that has, as of early FY 2025, led to an 82% drop in fare evasion.⁵⁵

Under WMATA's Bike Parking Equipment Project, seven station restorations were completed including two in Virginia: Tysons Corner and Greensboro. More stations are planned for restorations in FY 2025, improving access to the Metrorail stations.

In FY 2024, the Vertical Transportation Program replaced 33 escalators while 30 are still in progress, and three were rehabilitated. Escalator availability, a metric tracked in WMATA's Service Excellence Report, reached 94.5% availability in Q4 while elevator availability in the rail system reached 98.2% availability, largely driven by faster repair times.

Metrobus Fleet Reliability

CIP program category: Bus, bus facilities and paratransit

In FY 2024, 41 new, clean-diesel 40-ft buses were delivered along with three battery-electric 60-ft buses which improve customer experience and enhance operational savings by replacing buses at the end of their useful life. WMATA is in the process of working on a new bus contract.

Regarding bus maintenance, WMATA successfully rehabilitated 98 buses in FY 2024 out of a planned 100. Metrobus maintenance investments is to ensure state of good repair in which it supports the performance goal of 8,000 miles between failures for bus reliability.

Bus Garage Modernization Program

CIP program category: Bus, bus facilities and paratransit

Construction activities continued at the Northern Bus Garage Facility, which will be rebuilt to accommodate up to 150 buses and will support electric bus operations and maintenance. Foundation work started in May, while steel work is set to start in Q1 FY 2025. This project replaces the obsolete Northern Bus Garage to address structural deficiencies and improve use of limited facility space. The new facility will be designed to achieve LEED certification and retain the historical façade, provide multiple access points and parking for approximately 150 buses and incorporate potential retail or public space.

Radio Project and Automatic Train Operation

CIP program category: Rail systems investments

WMATA continued to advance several signals and communications projects in FY 2024. The 800MHz radio system for Arlington County is ongoing with targeted completion in FY 2025. This project will

provide voice and data communications in above- and below-ground sections of the WMATA operating area for both WMATA and first emergency responders.

Another critical rail systems project is the return to Automatic Train Operation (ATO), which aligns with WMATA's safety goals. ATO will lead to a decrease in red signal overturns and provide energy-saving enhancements through optimized acceleration and braking. The project is on track to complete testing on the Red Line in Q1 FY 2025 after having passed all safety-critical milestones in FY 2024. The target completion timeframe for ATO on all Metrorail lines is Q4 FY 2025.

Track and Structures Rehabilitation Work

CIP program category: Track and structures rehabilitation

While progress was made in track and structures rehabilitation work, only \$236.7 million of a planned \$397.1 million was expended in FY 2024. WMATA met or exceeded its target completion percentage in 11 of 15 component activities including third rail insulator replacement, joint elimination and track stabilization. All structure rehabilitation work met its target completion percentage in FY 2024 which includes enhancements such as grout pad rehabilitation and track signage.

Railcar Fleet Rehabilitation and Acquisition

CIP program category: Railcar and railcar facilities

In FY 2024 the 7000-series Wheelset Replacement Program (WRP) completed a total of 220 cars, exceeding the planned 180 for the year. The program is expected to be completed within three years, which is progressing ahead of schedule. 2000-series railcars were officially retired in FY 2024 having fulfilled their expected useful life after being introduced into the system in the 1980s.

WMATA made progress in the acquisition of 8000-series railcars in FY 2024 which are designed to enhance customer experience with open gangways and modernized technology. Due to scope changes in the open gangway system and Enterprise Video System (EVS) to align WMATA with peer transit systems around the world, the project milestones and timeline are under review with Hitachi.

4. Safety, Reliability, Financial Performance and Ridership Data

This chapter provides reporting on key safety, reliability, financial and ridership metrics. Data included in this chapter (Table 2) come from the National Transit Database (NTD) and WMATA performance reports. Until FY 2024, WMATA published Metro Performance Reports (MPR) but now publish quarterly and annual Service Excellence Reports (SER) to align with its Strategic Transformation Plan (STP), adopted in January 2023.⁵⁶ While this report uses the most recently available data, some NTD data lag 12 to 18 months due to the extensive auditing of these data.

Table 2: Data Sources and Years Presented

Category	Most Recent Data Available	Source
Safety	Calendar Year 2023	NTD
Reliability	Fiscal Year 2024 (July 1, 2023 – June 30, 2024)	SER
Financial Performance	Fiscal Year 2023 (July 1, 2022 – June 30, 2023)	NTD
Ridership	Fiscal Year 2023 (July 1, 2022 – June 30, 2023)	NTD

Safety

Safety data are collected by each transit agency and reported to the NTD, which provides common reporting definitions and has a robust data quality assurance and auditing process. Transit systems seek to minimize the frequency of all safety events. The Safety & Security (S&S) Time Series presents safety and security data through the S&S-40 form (Major events) and the S&S-50 form (Non-Major events). NTD measures transit safety by summarizing the total occurrences, Major and Non-Major, of certain safety events for rail and bus operations that include collisions, derailments (for rail only), fatalities, fire, injuries and security events.

The counts represented in Table 3 and Table 4 are totals for each category from when they were accessed from NTD. This time series data is subject to a validation process and current and previous years’ data may be revised by transit agencies based upon additional information or upon request by NTD analysts.⁵⁷ The following tables show the data as it was accessed in September 2024 and may show slightly different results for earlier calendar years than those shown in previous NVTC reports. It is important to note that safety data provided in this section includes calendar years 2020, 2021 and 2022, which reflect ridership and service impacts due to the COVID-19 pandemic. CY 2021 and CY 2022 data included the October 2021 Blue Line derailment and subsequent removal of 7000-series railcars from service.

Table 3 summarizes the total count of each type of Metrorail safety event for calendar years 2020 through 2023.

Table 3: Metrorail Safety

NTD Category	Safety Event	CY 2020	CY 2021	CY 2022	CY 2023
Events	Collision	10	9	7	11
	Derailment	4	4	5	7
	Security Event	49	70	72	96
	Fire	39	43	39	37
Fatalities	Fatality	6	6	3	8
Injuries	Injury	188	205	229	261

Source: WMATA NTD Report, Forms S&S-40 and S&S-50. Accessed September 11, 2024.

Table 4 summarizes the total count of each Metrobus safety event for calendar years 2020 through 2023.

Table 4: Metrobus Safety

NTD Category	Safety Event	CY 2020	CY 2021	CY 2022	CY 2023
Events	Collision	98	137	149	180
	Derailment	N/A	N/A	N/A	N/A
	Security Event	31	36	43	61
	Fire	1	4	3	0
Fatalities	Fatality	1	6	4	1
Injuries	Injury	238	330	320	391

Source: WMATA NTD Report, Forms S&S-40 and S&S-50. Accessed September 11, 2024.

Reliability

Reliability data are obtained from WMATA's Service Excellence Report and accompanying data file published to the WMATA website.⁵⁸

The data included in this report cover the fiscal years (July 1 - June 30) 2021 to 2024 unless otherwise noted. The reliability of a transit system may be measured by its punctuality and equipment dependability. Reliability metrics used by WMATA include:

1. **On-time performance (OTP)** is the rate at which a transit system carries passengers to their destination on time and is used to evaluate the timeliness of travel for both rail and bus operations.
2. **Mean distance between failures (MDBF)** is the average number of miles traveled before a railcar or bus experiences a failure. Some railcar failures do not result in a delay of service. For Metrobus, a failure implies an interruption of revenue service.

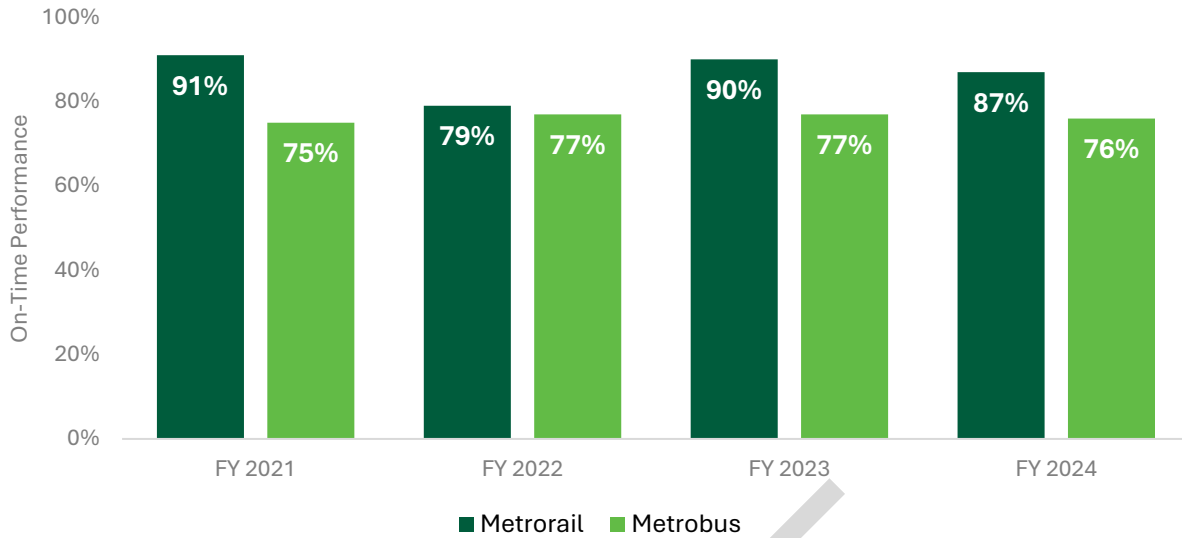
On-Time Performance

OTP is measured differently for Metrorail and Metrobus. Metrorail customer OTP measures the percentage of customers who complete their journey within the maximum amount of time it should take per WMATA service standards. These standards vary by line, time of day and day of the week and are informed by a customer's entry and exit from the system. A description of the measurement methodology is contained in the appendix. Figure 5 summarizes Metrorail OTP in FYs 2021 to 2024.

Following the October 2021 derailment and removal of 7000-series trains from service, WMATA saw a decrease in Metrorail OTP from 91% in FY 2021 to 79% in FY 2022. Wait times were doubled as Metrorail service was cut in half, but OTP began to recover as 7000-series trains were reintroduced and service increased in the second half of FY 2022 and into FY 2023. This improvement is reflected in the FY 2023 Metrorail OTP of 90%. Despite a slight drop to 87% in FY 2024, WMATA implemented systemwide automatic door operation in July 2024 and announced plans to roll out automatic train operations in 2025 which will create significant time savings across the Metrorail system.⁵⁹

FY 2022 Metrobus data exclude three days of data due to data collection errors as well as data from January 1, 2022 to February 6, 2022 due to operator absences from the COVID-19 Omicron surge that required a shift to Saturday service schedules during the week that prevented accurate measurement of on-time performance. All other data are reported for the full fiscal year.⁶⁰

Metrobus OTP remained approximately level at 76% OTP in FY 2024, just below WMATA's target of 77%. Despite just missing the target for FY 2024, WMATA cited increasing bus speeds from 2-5% on routes benefitting from the Clear Lanes project in the District of Columbia, highlighting the importance of dedicated travel lanes for buses for on-time performance.⁶¹ Clear Lanes is an initiative between WMATA and the District Department of Transportation (DDOT) that aims to improve bus travel times and enhance bus stop safety by using camera technology to identify illegally parked and stopped vehicles in dedicated bus lanes.



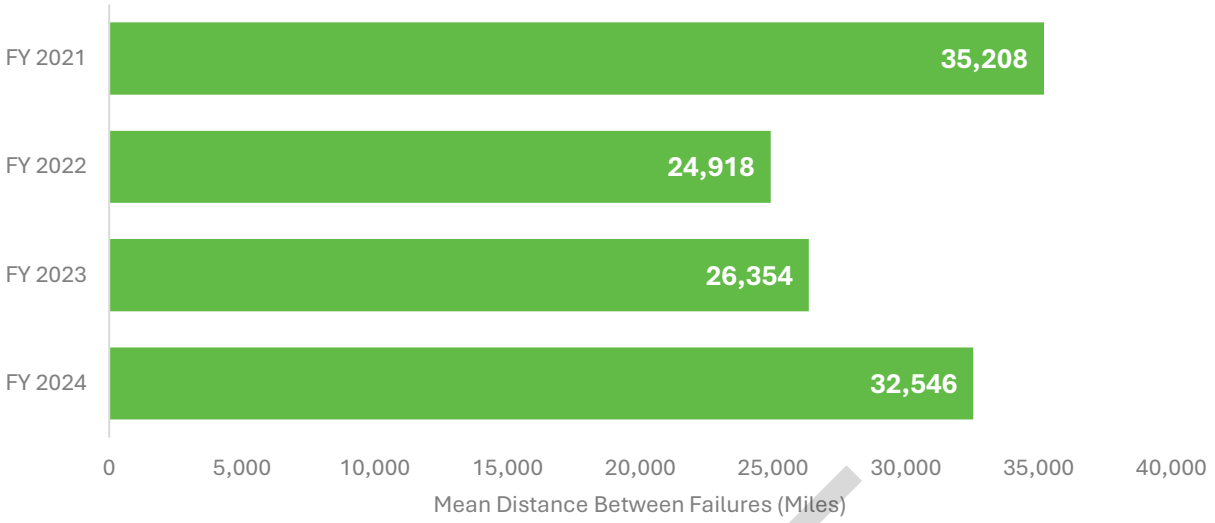
Source: WMATA FY 2024 Service Excellence Report

Figure 5: On-Time Performance by Mode

Mean Distance between Failures

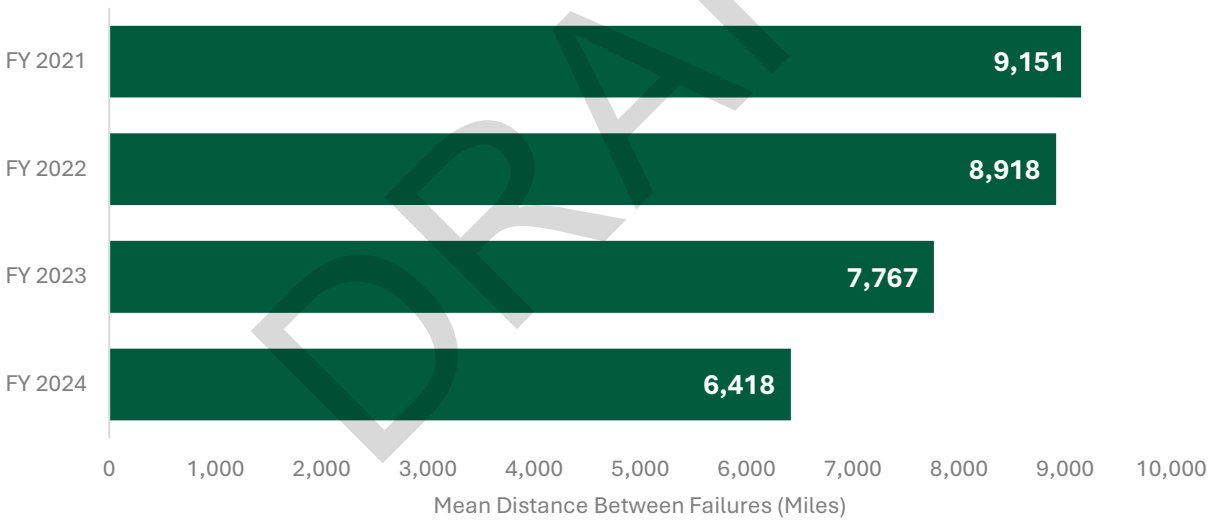
Mean distance between failure (MDBF) indicates the average number of miles traveled between vehicle failures. For rail, a car failure can occur without disrupting service or causing delay, instead resulting in discomfort or inconvenience. A bus failure is defined by a mechanical failure that interrupts revenue service and the following figures show MDBF for all years from FY 2021 to FY 2024. For Metrorail and Metrobus, total mileage was used for FY 2024. Federal Transit Administration (FTA) guidance on Safety Performance Targets and WMATA’s federally mandated Agency Safety Plan define MDBF as revenue miles between failures, not total miles.⁶² A higher MDBF values indicates greater reliability of Metro railcar and bus equipment.

Figure 6 and Figure 7 summarize the Metrorail and Metrobus reliability figures for FY 2021 to FY 2024. Metrorail fleet reliability increased again in FY 2024, recovering from a decline in FY 2022 due to the Blue Line derailment and removal of 7000-series railcars. As the 7000-series cars were gradually returned to service in FY 2023, Metrorail fleet reliability increased as these cars are more reliable than the older 2000-, 3000- and 6000-series railcars that Metrorail relied on after the derailment. This trend is expected to continue as WMATA announced the retirement of all 2000-series railcars in FY 2024. Metrobus equipment reliability for FY 2024 continued a downward trend from FY 2023. Total bus miles remained roughly the same as FY 2023 levels but mechanical incidents increased. WMATA continues to take action to improve fleet reliability by replacing aging buses and overhauling vehicles to improve performance in the second half of their life.



Source: WMATA FY 2024 Service Excellence Report

Figure 6: Metrorail Equipment Reliability, MDBF (Miles)



Source: WMATA FY 2024 Service Excellence Report

Figure 7: Metrobus Equipment Reliability, MDBF (Miles)

Financial Performance

Financial and ridership data are collected by each individual transit agency and reported to the NTD which provides common definitions, reporting definitions, and has a robust data quality assurance and auditing process. Financial performance measures include the following three measures:

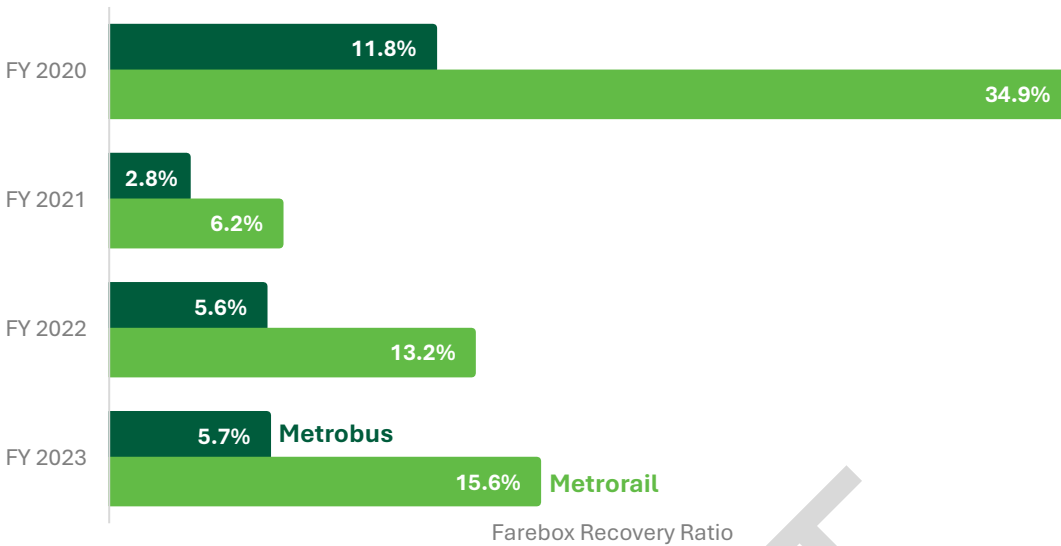
1. Metrorail Farebox Recovery and Metrobus Farebox Recovery.
2. Metrorail Service per Rider and Metrobus Service per Rider.
3. Cost per Metrorail Service Hour and Cost per Metrobus Service Hour.

NTD FY 2023 data is reported for each of the above measures and includes calculations for both Metrorail and Metrobus. For Metrobus, data presented includes both services that are directly operated by WMATA and those which are operated by a contracted provider. It is also important to note that due to robust auditing and review processes, NTD data are typically released at least one or more years after the fiscal year they represent. Data provided in this section include fiscal years 2020 through 2022 and these years reflect the COVID-19 pandemic's impacts on service and ridership. At various points during the pandemic, WMATA adjusted Metrorail and Metrobus service levels to respond to healthcare and safety protocols, workforce availability and the demand for service amidst significantly reduced ridership. This resulted in an overall decline of Metrorail and Metrobus service hours in FY 2020 and 2021 when compared to pre-pandemic years. These data also reflect the impacts of the October 2021 Blue Line derailment and subsequent removal from service of the 7000-series railcars. WMATA began a gradual and phased reintroduction of the 7000-series railcars in June 2022.

Farebox Recovery

Farebox recovery indicates how much of an agency's operating costs are recovered through passenger fare revenues. A higher recovery ratio indicates that the transit agency recoups a larger share of its operating costs through passenger revenue. Because rail systems generally have higher fares and higher ridership than bus systems, farebox recovery tends to be higher for rail systems than for bus systems.

Metrorail farebox recovery was 15.6% and Metrobus farebox recovery was 5.7% in FY 2023 (Figure 8). The COVID-19 pandemic had a major impact on the entire Metro system's passenger revenues as ridership dropped to its lowest point in FY 2021. Additionally, as a COVID safety precaution, Metrobus instituted rear-door boarding and waived fares from March 2020 until January 2021.⁶³ In FY 2022, the system began to recover with both Metrorail and Metrobus farebox recovery increasing from the previous year, but this recovery was slowed due to the Blue Line derailment in October 2021 and the subsequent removal of the 7000-series railcars from service. In FY 2023, farebox recovery slightly improved from FY 2022 levels. Metrobus fare recovery remains low due largely to significant fare evasion on the bus system.



Source: National Transit Database FY 2023

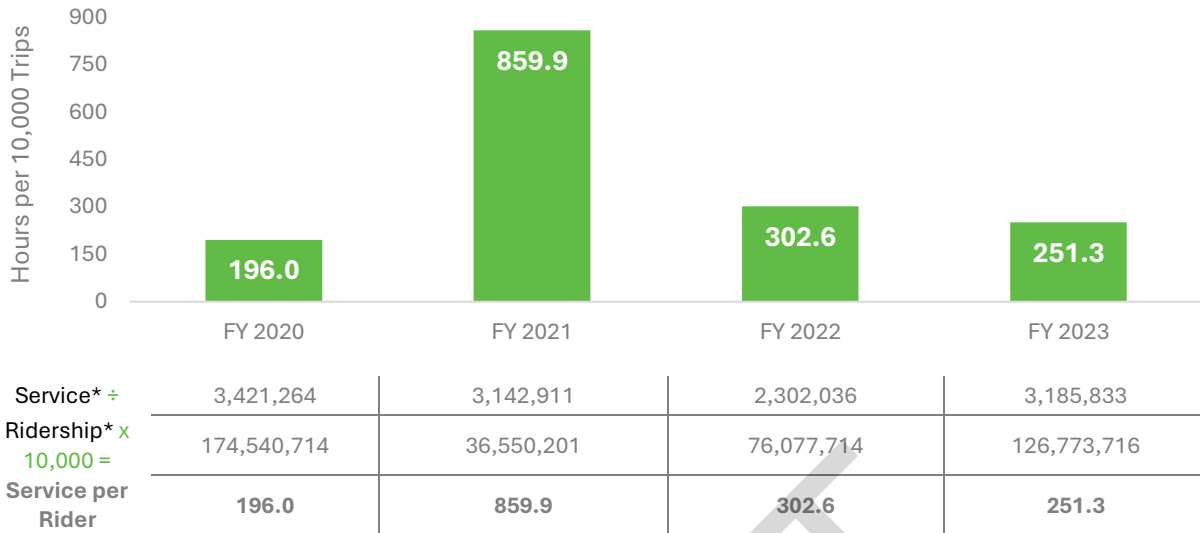
Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 8: Metrorail and Metrobus Farebox Recovery

Service per Rider

Service per rider indicates the number of railcar or bus service hours offered per 10,000 passenger trips. This figure summarizes how efficiently an agency is transporting passengers. Agencies strive to strike a balance between serving as many passengers as possible while providing service at a reasonable cost. A low service per rider number indicates that relatively few hours of service are required to serve 10,000 passengers, which indicates higher efficiency.

Figure 9 and Figure 10 depict Metrorail and Metrobus service per rider for the four most recent fiscal years available. FY 2023 Metrorail service per rider was 251.3 hours per 10,000 trips, and Metrobus service per rider was 366.9 hours per 10,000 trips. Since this ratio reflects the total hours of service divided by the number of riders, significant changes to either input will cause corresponding increases or decreases to the service per rider metric. In FY 2021, service per rider increased for both Metrorail and Metrobus, as ridership dropped significantly for both modes due to the pandemic but more dramatically for Metrorail. While there were COVID-19 related service disruptions in FY 2021 as WMATA adjusted its service patterns, WMATA ran relatively high service levels for most of FY 2021 to provide bus and rail service for essential workers. With the Blue Line derailment in October 2021 and the subsequent removal of the 7000-series railcars from service, WMATA ran significantly less service on Metrorail in FY 2022 than in FY 2021. In FY 2023, service per rider trended further downward indicating that WMATA was able to continue operating more efficiently across its Metrorail and Metrobus systems.

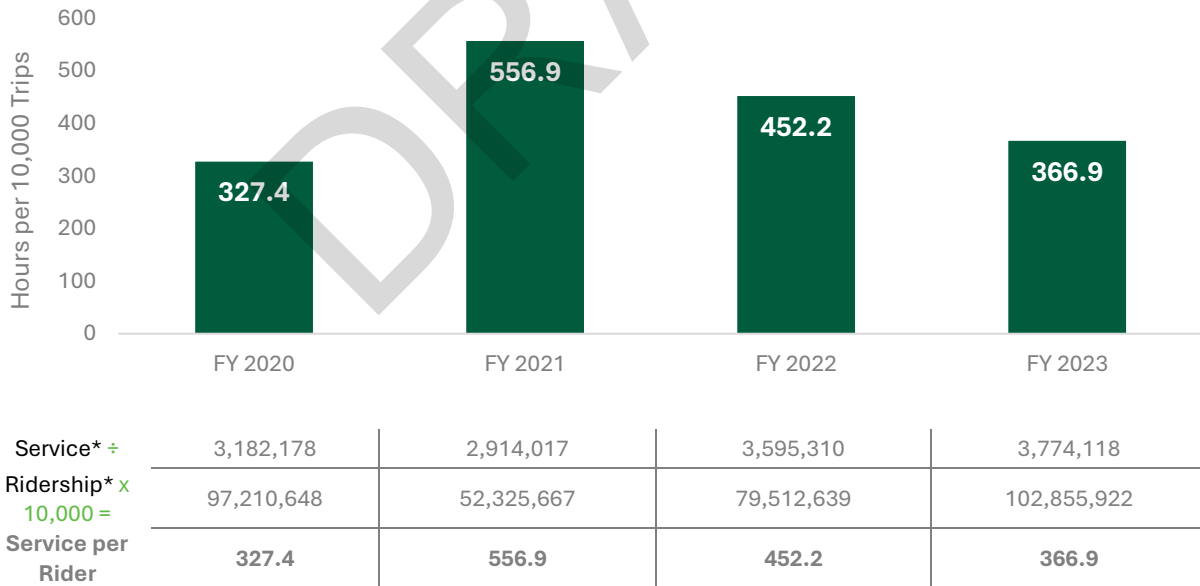


*Service is measured by vehicle revenue hours. Ridership is measured by unlinked passenger trips.

Source: National Transit Database FY 2023

Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 9: Metrorail Service per Rider



*Service is measured by vehicle revenue hours. Ridership is measured by unlinked passenger trips.

Source: National Transit Database FY 2023

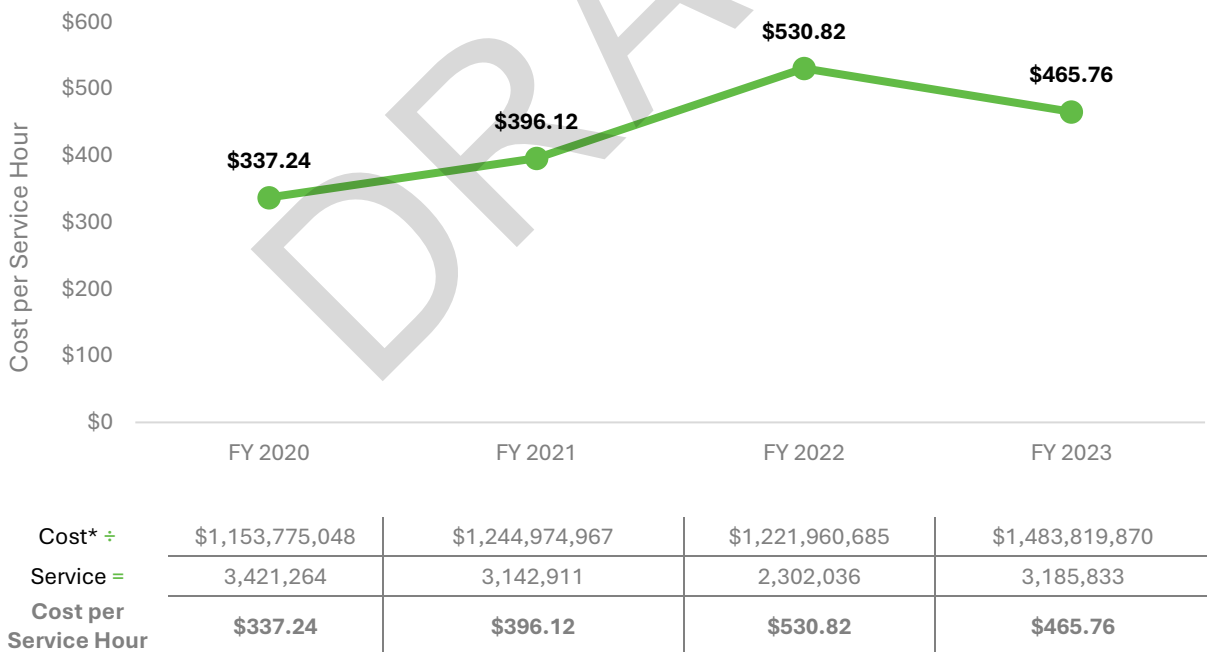
Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 10: Metrobus Cost per Service Hour

Cost per Service Hour

The cost per Metrorail service hour is the average cost associated with the operation and maintenance of one railcar for each hour of passenger revenue service. A lower number indicates a lower hourly cost to operate each railcar. Heavy rail services in the U.S. generally have a substantially higher cost per service hour than bus services because they use larger vehicles over shorter service miles.⁶⁴ The cost per Metrobus service hour is the approximate cost associated with the operation and maintenance of a vehicle for each hour of revenue service. A lower number indicates a lower average hourly cost to operate each bus.

The cost per Metrorail service hour was \$465.76 (Figure 11) and the cost per Metrobus service hour was \$256.39 in FY 2023 (Figure 12). Since this ratio reflects the total expenses divided by the number of revenue service hours, significant changes to either input will cause corresponding increases or decreases to cost per service hour metric. The increase in Metrorail cost per service hour between FY 2021 and FY 2022 reflects the October 2021 derailment and the subsequent removal of 7000-series trains from service. With 7000-series cars removed from service, the total Metrorail service hours decreased for FY 2022, causing the cost per service hour to increase. However, the cost per Metrobus service hour decreased between FY 2021 and FY 2022. It is important to note that the congressional intent of federal pandemic aid for transit agencies was to avoid layoffs, so in fiscal years in which WMATA was utilizing federal pandemic aid even if less service was being run it would not yield significant cost savings. In FY 2023, Metrorail cost per service hour fell 12% to \$465.76 after a peak of \$530.82 per service hour in FY 2022. Metrobus cost per service hour increased 9% in FY 2023 to \$256.39.

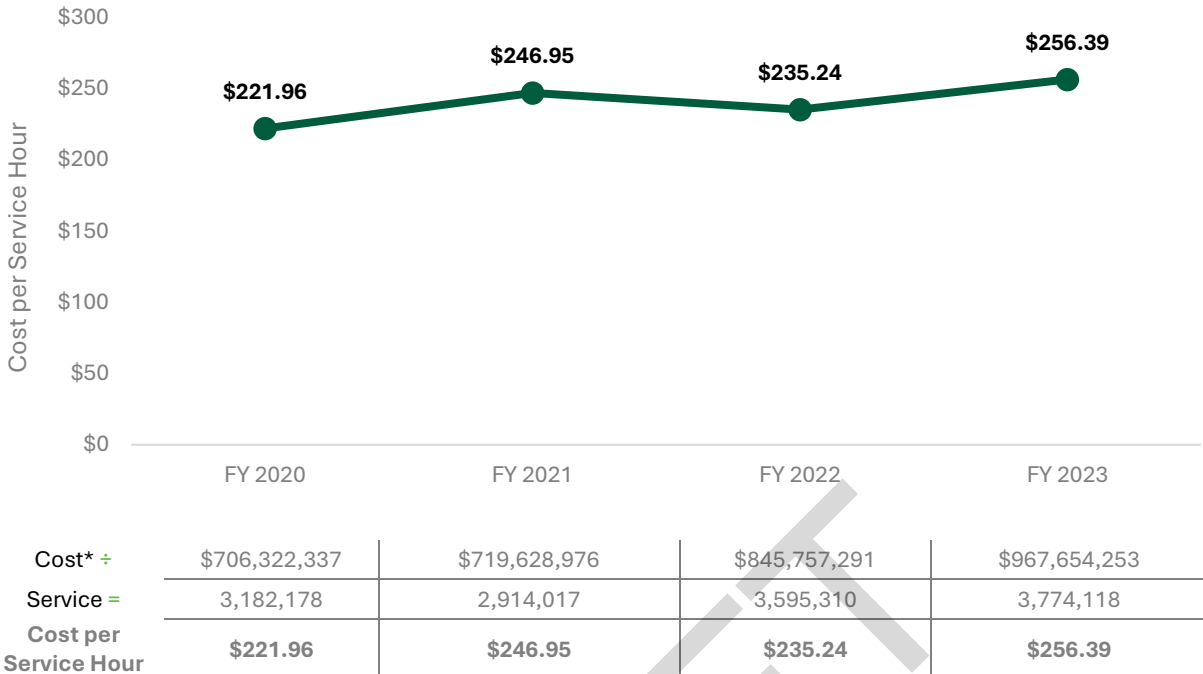


* Cost is measured by total operating expenses. Service is measured by vehicle revenue hours.

Source: National Transit Database FY 2023

Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 11: Metrorail Cost per Service Hour



* Cost is measured by total operating expenses. Service is measured by vehicle revenue hours.

Source: National Transit Database FY 2023

Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 12: Metrobus Cost per Service Hour

Ridership

Financial and ridership data are collected by each transit agency and reported to the NTD which provides common and reporting definitions and has a robust data quality assurance and auditing process. Because public transit services exist to transport passengers, transit systems seek to maximize patronage, measured in passengers. This section summarizes Metrorail and Metrobus ridership, which is measured by the NTD using:

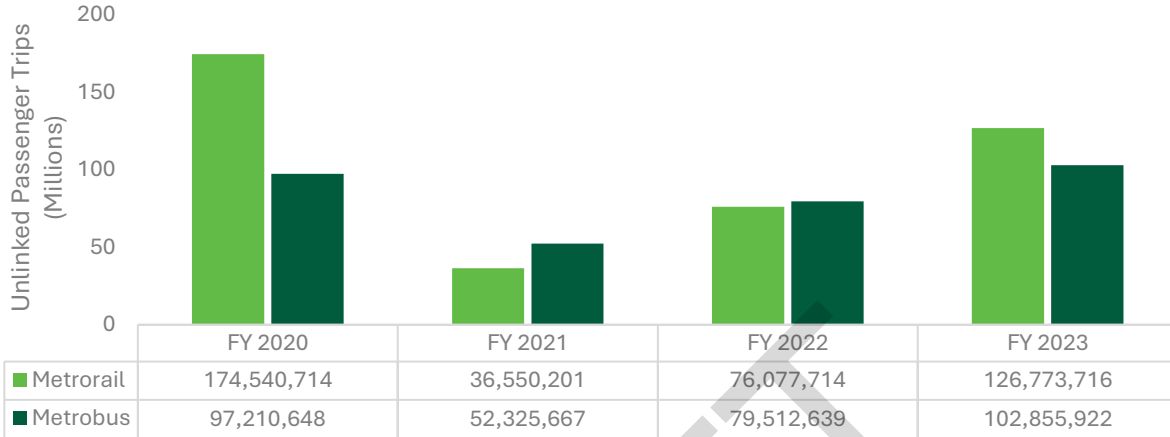
1. Unlinked Passenger Trips (UPT)
2. Passenger Miles Traveled (PMT)

For Metrobus, data presented includes both services that are directly operated by WMATA and those which are operated by a contracted provider. Due to robust auditing and review processes, NTD data are typically released at least one year or more after the fiscal year they represent. Data provided in this section include fiscal years 2020 through 2023 and reflect impacts on ridership due to the COVID-19 pandemic and implementation of healthcare and safety protocols by WMATA beginning in March 2020.

Unlinked Passenger Trips

UPT indicates the number of passengers boarding vehicles and illustrates the overall number of passengers passing through the total Metro system. A higher UPT reflects greater use of transit

services. This section provides FY 2023 UPT data for Metrorail and Metrobus. The official NTD definition for this ridership metric is included in the Appendix. There were 126,773,716 Metrorail unlinked passenger trips and 102,855,922 Metrobus unlinked passenger trips in FY 2023 (Figure 13) which both increased from FY 2022. Notably, Metrobus UPT exceeded FY 2020 levels in FY 2023.



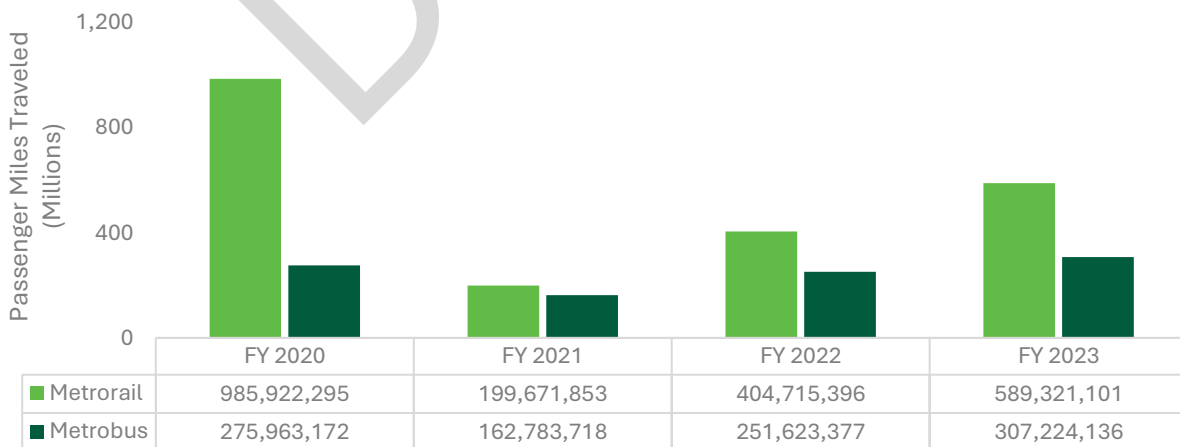
Source: National Transit Database

Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 13: Metrorail and Metrobus Ridership, UPT

Passenger Miles Traveled

PMT indicates the total sum of miles traveled by all passengers aboard the transit service. A single passenger traveling 10 miles by bus would count as 10 passenger miles traveled. As with UPT, a higher PMT figure indicates greater patronage of transit services, providing insight into both UPT and distances traveled by passengers. Total passenger miles traveled for Metrorail was 589,321,101 and Metrobus was 307,224,136 in FY 2023 (Figure 14).



Source: National Transit Database

Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 14: Metrorail and Metrobus Ridership, UPT

Appendix

This appendix includes definitions and sources for the terminology used throughout the report. To provide a holistic picture of WMATA's safety, reliability, financial and ridership performance, the definitions below have been aggregated from the following sources as indicated in the endnotes:

1. When not indicated otherwise, definitions are taken directly from the NTD Glossary.⁶⁵
2. For metrics without an NTD definition, a definition is taken from WMATA's Service Excellence Report (known as Metro Performance Report (MPR) until FY 2025). These definitions also include an explanation of what each metric means and why it is important to their strategy. The explanations are included with the definitions.
3. To build a complete understanding of each definition, WMATA provided NVTC with clarifications, which are denoted with the footnote "Provided by WMATA."

Collision

A vehicle/vessel accident in which there is an impact of a transit vehicle/vessel with: another transit vehicle, a non-transit vehicle, a fixed object, a person(s) (suicide/attempted suicide included), an animal, a rail vehicle, a vessel or a dock.

Cost per Service Hour

The average cost to operate one vehicle/passenger car for one hour of passenger service. Calculated for each mode by taking the total operating expenses and dividing by total vehicle revenue hours.

Derailments

Non-collision incidents in which one or more wheels of a vehicle unintentionally leaves the rails.

Failure, Metrobus

WMATA counts buses as failures due to mechanical problems that resulted in lost or interrupted trips. Therefore, only bus maintenance chargeables (BMCs) are counted.

- Major failures are BMCs that may leave the bus stranded on the street or result in grossly unsafe operation. Examples: brakes, door interlock, generator, smoke/fire, large fluid leaks, engine or transmission shutdown, broken wipers on rainy days. ("Accidents" caused by mechanical failure (i.e., brakes not engaging) are counted as major.)
- Minor failures are BMCs that may be deemed unsafe by the operator, manufacturer or engineers to protect the bus from irreparable damage. Examples: engine/transmission malfunction indicators, windshield, mirrors, unsafe interior or exterior body issues.

Failure, Metrorail

WMATA defines a railcar failure as a mechanical failure that requires corrective maintenance. Failures related to operator error or customer behavior, e.g., doors that fail because they were held open by customers, are not counted. Not all failures prevent vehicles from completing scheduled

revenue trips or starting the next scheduled revenue trips. In some cases, corrective maintenance can be conducted after the scheduled trips are completed. A delay is a failure that causes a train to hold in place for more than four minutes.

Farebox Recovery Ratio⁶⁶

The portion of operating expenses that are paid for by fare revenues. This metric is calculated as: *Fare Revenue* ÷ *Operating Expenses*.

Fare Revenue

All income received directly from passengers, paid either in cash or through pre-paid tickets, passes, etc. It includes donations from those passengers who donate money on the vehicle. It includes the reduced fares paid by passengers in a user-side subsidy arrangement.

Fatality

A death or suicide confirmed within 30 days of a reported incident. Does not include deaths in or on transit property that are a result of illness or other natural causes.

Fire

Uncontrolled combustion made evident by flame that requires suppression by equipment or personnel.

Headway

The time interval between vehicles moving in the same direction on a route.

Injury

Any damage or harm to persons as a result of an event that requires immediate medical attention away from the scene.

Linked Passenger Trips⁶⁷

A linked passenger trip is counted when a customer enters through a faregate. In an example where a customer transfers between two trains to complete their travel one trip is counted. Metrorail reports linked passenger trips.

Labor (Cost)⁶⁸

The pay and allowances due employees in exchange for the labor they provide on behalf of the transit agency. The labor allowances include payments made directly to the employee arising from the performance of a piece of work.

Major Event Report (S&S-40)⁶⁹

The Major Event Report (S&S-40) captures detailed information on severe safety and security events that occur within a transit environment. Agencies must complete one S&S-40 per reportable event,

regardless of how many thresholds an event meets. A reportable event is one that meets any NTD reporting threshold (detailed below) and occurs on transit right-of-way or infrastructure, at a transit revenue facility, at a maintenance facility or rail yard, during a transit-related maintenance activity, or involves a transit revenue vehicle.

Mean Distance between Failures

The average number of miles traveled before a mechanical breakdown requiring the bus to be removed from service or deviate from the schedule. This can also be expressed as: *Total revenue miles ÷ Total number of failures*.

Mean distance between failures is used to monitor trends in vehicle breakdowns that cause buses to go out of service and to plan corrective actions. Factors that influence fleet reliability include vehicle age, quality of maintenance program, original vehicle quality and road conditions affected by inclement weather and road construction.

National Transit Database

A reporting system run by the Federal Transit Administration that collects public transportation financial and operating information.

Non-Major Monthly Summary (S&S-50)⁷⁰

The Non-Major Monthly Summary Report captures monthly summary information on minor fires and other less severe safety events that are not reportable as Major Events.

Non-Labor Costs

The costs associated with operating expenses including fuel/lube, tires, tubes, utilities, casualty/liability costs, taxes and other materials.⁷¹

On-Time Performance (Metrobus)

Bus on-time performance (OTP) communicates the reliability of bus service, which is a key driver of customer satisfaction and ridership. For schedule-based routes, OTP measures adherence to the published route schedule for delivered service. For headway-based routes, OTP measures the adherence to headways, or the time customers wait between buses. Headway-based routes include routes 70, 79, X2, 90, 92, 16Y and Metroway.

Metrobus measured OTP using schedule-based methodology until FY 2020. After a pilot in FY 2019, OTP was measured using a blended schedule- and headway-based methodology beginning in FY 2020 and continuing through September 2021. Beginning in October 2021, WMATA returned to measuring all routes on a schedule-based methodology.

Factors that can affect OTP include traffic congestion, detours, inclement weather, scheduling, vehicle reliability, operational behavior or delays caused by passengers. Measurements are calculated as follows:

Percentage of bus service delivered on-time

Schedule-based routes = Number of time points delivered on time based on a window of 2 minutes early and 7 minutes late ÷ Total number of time points delivered.

Headway-based routes = Number of time points delivered within the scheduled headway + 3 minutes ÷ Total number of time points delivered.

Fiscal Year	Data Availability
FY 2021	Available for entire fiscal year
FY 2022	Excludes data from 9/6/2021, 1/1/2022 – 2/6/2022, 3/3/2022, and 5/30/2022
FY 2023	Available for entire fiscal year
FY 2024	Available for entire fiscal year

On-Time Performance (Metrorail)

Metrorail customer OTP measures the percentage of customers who complete their journey within the maximum amount of time it should take per WMATA service standards. Actual journey time is calculated from the time a customer taps a SmarTrip card to enter the system, to the time when a SmarTrip card is tapped to exit. Factors that can affect OTP include infrastructure conditions, missed dispatches, railcar delays (e.g., doors), or delays caused by sick passengers. Station stops are tracked system-wide, except for terminal and turn-back stations. Measurements are calculated as follows:

Number of customer trips with travel times less than or equal to expected travel times ÷ number of customer trips.

Operating Expenses

These expenses include labor and non-labor costs and services for operating and maintaining the mode, including general administration costs. Labor costs are fully loaded, meaning they include fringe benefit costs (directly paid to employees as well as indirectly, e.g., payments to pension funds) in addition to wages and salary costs.⁷²

Passenger Miles Traveled (PMT)⁷³

The cumulative sum of the distances ridden by each passenger.

Ridership

Ridership is a measure of total service consumed and an indicator of value to the region. Drivers of this indicator include service quality and accessibility.

Passenger trips are defined as follows:

- Metrorail reports passenger trips. A passenger trip is counted when a customer enters through a faregate. In an example where a customer transfers between two trains to complete their travel one trip is counted.
- Metrobus reports passenger boardings. A passenger boarding is counted via the onboard Automatic Passenger Counter (APC) when a customer boards a Metrobus. In an example where a customer transfers between two Metrobuses to complete their travel two trips are counted. Metrobus totals also include shuttles to accommodate rail station shutdowns and other track work.

Revenue Service (Hours)

The time when a vehicle is available to the public and there is an expectation of carrying passengers. These passengers either directly, pay fares, are subsidized by public policy, or provide payment through some contractual arrangement. Vehicles operated in fare-free service are considered in revenue service. Revenue service includes layover and recovery time and excludes deadhead,⁷⁴ vehicle maintenance testing, school bus service and charter service.

Security Event

An occurrence of a bomb threat, bombing, arson, hijacking, sabotage, cyber security event, assault, robbery, rape, burglary, suicide, attempted suicide (not involving a transit vehicle), larceny, theft, vandalism, homicide, CBR (chemical/biological/radiological) or nuclear release or other event.

Service per Rider

A performance metric that measures the ratio of vehicle revenue hours to unlinked passenger trips. Note that in this report, this ratio is scaled by a factor of 10,000 for readability. The metric is calculated as:

$$(Total\ Vehicle\ Revenue\ Hours \div Number\ of\ Unlinked\ Trips) \times 10,000.$$

Time Point

A time point is a bus stop where there are frequent boardings and alighting that has a scheduled time that the bus should arrive for each trip. The Metrobus schedule is built by calculating the running time between each time point. Adherence to schedule is measured as the bus leaves each time point except the last timepoint for each run. Time point is used in the definition of on-time performance for Metrobus.

Unlinked Passenger Trips (UPT)

The number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

Passenger trips are defined as follows:

- Metrorail reports passenger trips. A passenger trip is counted when a customer enters through a faregate. In an example where a customer transfers between two trains to complete their travel two unlinked passenger trips are counted.
- Metrobus reports passenger boardings. A passenger boarding is counted via the onboard Automatic Passenger Counter (APC) when a customer boards a Metrobus. In an example where a customer transfers between two Metrobuses to complete their travel, two trips are counted. Metrobus totals also include shuttles to accommodate rail station shutdowns and other track work.

Vehicle Revenue Hours

Vehicle revenue hours are the amount of time the bus operates in revenue service. Vehicle revenue hours include layover and recovery time and exclude deadhead, operator training, vehicle maintenance testing, and school bus and charter services.

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⁶⁶ Instead of farebox recovery ratio, the Federal Transit Administration (FTA) uses the term ‘recovery ratio’ per the FTA 2019 Metrics: <www.transit.dot.gov/ntd/data-product/2019-metrics>. This definition is adapted from the FTA Metrics list.

⁶⁷ WMATA. “Metro Performance Report.” Fiscal Year 2020. <<https://www.wmata.com/about/records/scorecard/upload/Q4-FY20-Metro-Performance-Report.pdf>>

⁶⁸ The NTD uses ‘labor’ as the metric for labor cost. <<https://www.transit.dot.gov/ntd/national-transit-database-ntd-glossary#S>>

⁶⁹ Adapted from: National Transit Database. “NTD Safety & Security Reporting Manual.” p. 16. 2020. <<https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/ntd/146986/2020-ntd-safety-and-security-policy-manual.pdf>>

⁷⁰ Adapted from: National Transit Database. “NTD Safety & Security Reporting Manual.” p. 55. 2020. <<https://www.transit.dot.gov/sites/fta.dot.gov/files/docs/ntd/146986/2020-ntd-safety-and-security-policy-manual.pdf>>

⁷¹ Categories under Operating Expenses are based on NTD Definition. Federal Transit Administration. “The 2020 Reporting Policy Manual for the National Transit Database.” October 2020.

<https://www.transit.dot.gov/sites/fta.dot.gov/files/2020-10/2020%20NTD%20Reporting%20Policy%20Manual_1.pdf>

⁷² Federal Transit Administration. “The 2020 Reporting Policy Manual for the National Transit Database.” p. 90. October 2020. <https://www.transit.dot.gov/sites/fta.dot.gov/files/2020-10/2020%20NTD%20Reporting%20Policy%20Manual_1.pdf>

⁷³ Federal Transit Administration. “The 2020 Reporting Policy Manual for the National Transit Database.” p. 129. October 2020. <https://www.transit.dot.gov/sites/fta.dot.gov/files/2020-10/2020%20NTD%20Reporting%20Policy%20Manual_1.pdf>

⁷⁴ Federal Transit Administration. “The 2020 Reporting Policy Manual for the National Transit Database.” p. 114. October 2020. <https://www.transit.dot.gov/sites/fta.dot.gov/files/2020-10/2020%20NTD%20Reporting%20Policy%20Manual_1.pdf>

Working Draft - October 31, 2024



Submitted to the Governor and
General Assembly December 2024

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DRAFT NVTC 2025 Legislative and Policy Agenda

STATE PRIORITIES

- Continue to advocate for long-term, sustainable, dedicated funding to ensure WMATA, VRE, and all Northern Virginia transit systems meet the growing needs of public transit in our region.
- Preserve additional state aid (FY 2026) for WMATA and operating cap re-baselining contained in the two-year state budget.
- Preserve and restore state, regional and local funding for transit and transportation.
- Protect existing NVTC autonomy, programs and funding sources.
- Continue support for state investment in Transforming Rail in Virginia and other passenger rail initiatives.
- Preserve transit's ability to effectively compete within the SMART SCALE program.
- Support funding for development and implementation of transit innovations, including transit signal priority, zero and low-emission public transit and fare payment technologies while identifying opportunities to remove legislative barriers to improving transit.
- Support ongoing efforts to streamline the permitting process for bus stop improvement projects.
- Advance legislation that would add policies for rolling stock and operating properties of railroads used for commuter rail service in the Commonwealth, as well as cybersecurity policies for organizations operating such service, to the exemptions for state tax on surplus lines insurance.

FEDERAL PRIORITIES

- Ensure transit systems in Northern Virginia have the maximum access to federal formula funding and state of good repair funding, matching or exceeding the funding levels authorized in the Infrastructure and Investment Jobs Act.
- Maximize the region's access to federal transportation funding programs and competitive grant opportunities.
- Recognize the importance of public transit in accessing federal agencies and facilities, identify and secure federal long-term capital and operating funding opportunities that benefit local transit systems, including WMATA and VRE.
- Encourage federal return-to-office policies that encourage transit use throughout the work week and secure a replacement for the region's losses in fares from riders using federal transit benefits.
- Continue support for commuter tax benefits for both the private and public sector.
- Work with federal, state and local partners to address long-term challenges to domestic bus manufacturing highlighted by APTA's bus manufacturing task force.



TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice, Allan Fye and Vikram Sinha
DATE: October 31, 2024
SUBJECT: Report from the Chair of the Program Advisory Committee

At the November 2024 meeting, the Commission will receive a report from the chair of the Program Advisory Committee and staff will give a presentation on the Envision Route 7 BRT Strategic Implementation Plan and the proposed Phase 4-2 Mobility Study.

A. Envision Route 7 BRT Strategic Implementation Plan

Staff will brief the Commission on the Envision Route 7 Bus Rapid Transit (BRT) Strategic Implementation Plan. The draft Plan reflects both Commission and stakeholder feedback to accelerate delivery of bus improvements that enables BRT on the Route 7 corridor and recognizing the growing ridership of the existing 28A Metrobus route. An initial overview of the Strategic Implementation Plan was presented to the Commission on June 6 and staff will seek adoption of the plan at the December 5 meeting.

The Plan documents the roles and responsibilities of NVTC and partners to realize BRT along the corridor while simultaneously enhancing current transit service. Key elements of the Plan include:

- Capital improvements that each jurisdiction (Fairfax and Arlington counties, cities of Falls Church and Alexandria) will make to improve the existing bus service, including a timeline for capital funding and pending grant applications;
- Actions needed by partners (Washington Metropolitan Area Transit Authority, Virginia Department of Transportation, Department of Rail and Public Transportation, Transportation Planning Board and Federal Transit Administration) to support the overall short-term and long-term elements of the project; and
- Next steps for NVTC staff to lead all planning, environmental reviews and additional analysis, as well as all administrative and coordination efforts to realize the full benefits of this project.

The Plan is a living document that guides the project through to construction of a variety of capital improvements that will improve the customer experience by accelerating targeted bus improvements (short-term) in challenging locations while working towards a context-sensitive BRT (long-term) that best serves riders and host jurisdictions.

B. Envision Route 7 BRT Phase 4-2 Mobility Study

Staff will also brief the Commission on the plans to issue a Request for Proposals (RFP) for Envision Route 7 Planning services on Route 7 from Seven Corners to the Mark Center (Phase 4-

2). The Phase 4-2 Mobility Analysis Study will examine the segment from Seven Corners in Fairfax County to the Mark Center in Alexandria, as well as do a deeper dive on operational options in the City of Falls Church, completing the corridor's mobility analysis.

Phase 4-2 will build off previous analysis by NVTC and the Fairfax County Department of Transportation and include the following study objectives (preliminary):

- Define the mobility benefits of BRT and facilitate an understanding of the BRT project.
- Understand the operational impact of BRT along the study corridor.

Specifically, the Phase 4-2 Mobility Study will:

1. Identify Alexandria BRT southern terminus (Southern Towers vs. Mark Center).
2. Conduct analysis on the City of Falls Church regarding Business Access and Transit (BAT) vs. HOV, queue jump layout/cross-section.
3. Provide coordination forum to resolve:
 - a. Sycamore/Roosevelt bus priority in Arlington.
 - b. 28A and BRT alignments in Fairfax County and Alexandria.
 - c. Transit connectivity between Columbia Pike and Route 7 bus routes.

The Commission will be asked to authorize the release of this RFP at its December meeting.



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ENVISION ROUTE 7

Strategic Implementation Plan

Better Bus Now:

A New Approach to BRT on Route 7



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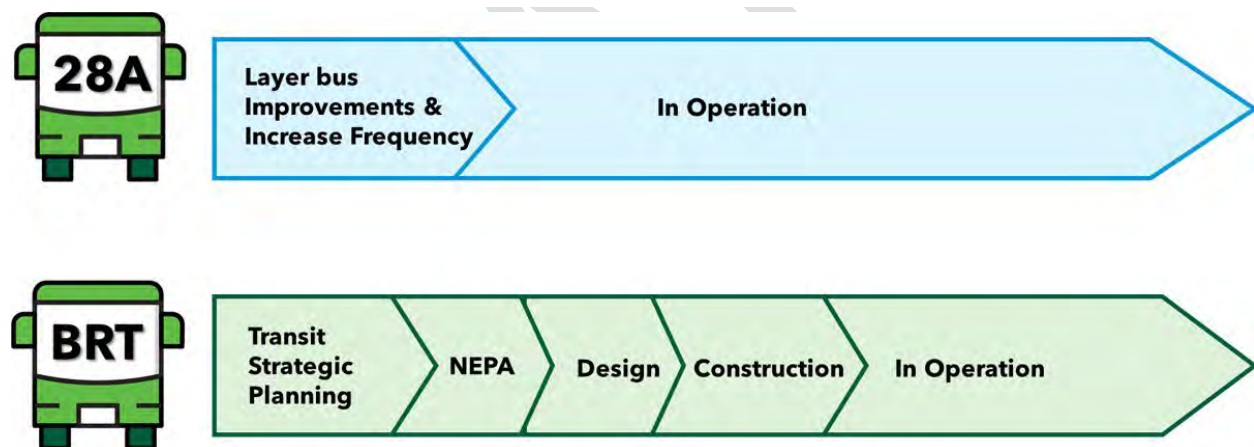
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Executive Summary

The Northern Virginia Transportation Commission (NVTC) leads the planning process for Envision Route 7, a Bus Rapid Transit (BRT) system designed to connect the Mark Center in Alexandria to Tysons in Fairfax County via Bailey’s Crossroads, Seven Corners and Falls Church along the Route 7 corridor. Initially conceived in the early 2010s, the project has gained renewed focus as NVTC seeks to expedite bus improvements on Route 7. This acceleration reflects the increasing ridership of WMATA’s Metrobus Route 28A and aligns with longstanding regional commitments to enhance transit service as a foundational step toward full BRT implementation.

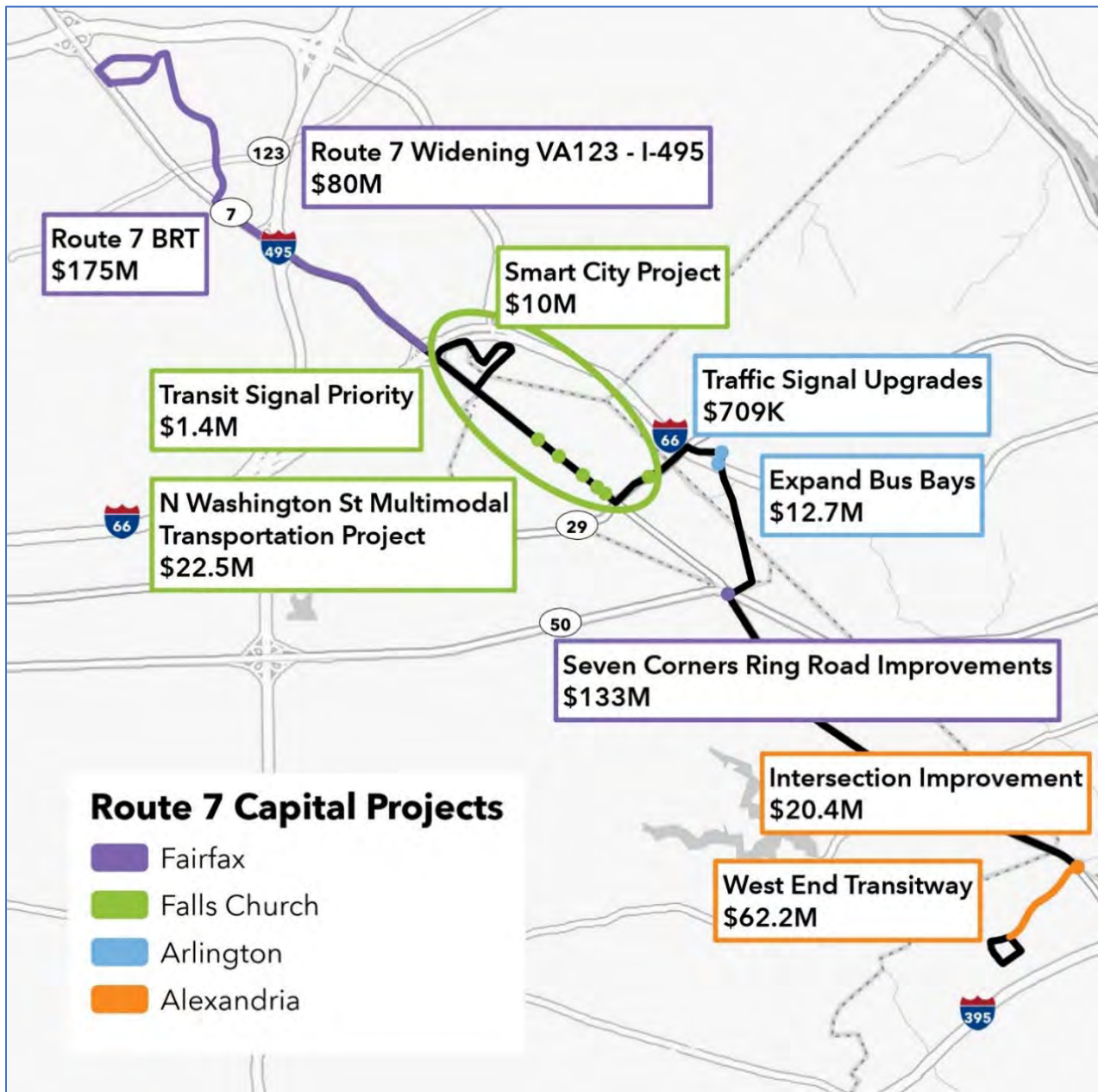
The Envision Route 7 Strategic Implementation Plan (the Plan) outlines tactical bus service improvements that each jurisdiction and bus operator are committed to delivering as well as next steps for Commission staff. By establishing a phased approach, the project aims to enhance customer experience through targeted bus improvements that address critical areas along Route 7, laying the foundation for the more extensive BRT construction and eventual service.

Figure 1: Proposed Strategy for Envision Route 7 BRT



The Plan’s objective is to prioritize implementation efforts, transforming Route 7 and the Metrobus 28A into a “Better Bus Now” while the longer-term planning can proceed to build the eventual Route 7 BRT (Figure 1). To date, there are 10 capital projects that have been funded that have a direct link to improving bus transit service along the proposed Route 7 BRT corridor (Figure 2). These projects, and those identified in future planning activities, are key to providing better bus improvements to riders along the corridor well in advance of the opening of the BRT line.

Figure 2: Planned and Funded Metrobus 28A Capital Projects



Overview

NVTC has identified the next steps for bus service improvements along the Route 7 BRT corridor that the jurisdictions are committed to delivering. This Plan documents tactical

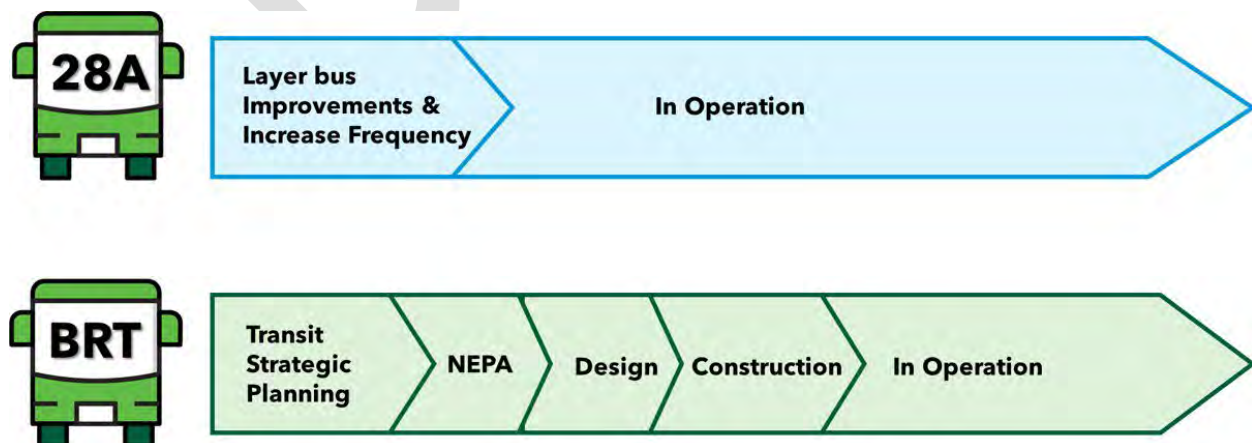


Figure 3: Metrobus 28A in Falls Church

improvements to bus service that each jurisdiction and the Metrobus 28A bus operator (Washington Metropolitan Area Transit Authority or Metro) are committed to delivering. With jurisdictional agreement, context sensitive, multi-modal treatments that support local needs and expectations can be advanced to increase the efficiency of bus service and enhance passenger experience. These improvements will improve not only the current Metrobus 28A that runs along the corridor, but other Metrobus routes and those operated by Fairfax Connector and Alexandria’s DASH that intersect.

By layering enhancements, bus service can improve with targeted improvements that deliver faster service in the near-term. These treatments include Transit Signal Priority, painted bus lanes, queue jumps, enhanced bus stops, and simplified routing that renders faster and more efficient bus service. NVTC, working in partnership with WMATA and the local jurisdictions, can improve service on the existing Metrobus 28A route with a smaller cost and time footprint. Furthermore, NVTC, through its remaining Phase 4-2 Mobility Study noted below, will identify additional opportunities for near-term improvements, all while continuing to lay the groundwork for the more capital-intensive BRT service on Route 7.

Figure 4: Proposed Strategy for Envision Route 7 BRT



NVTC's Role on the Corridor

Since 2010, NVTC has served as the primary planning agency for the Route 7 BRT project, overseeing and coordinating Envision Route 7 efforts from the outset. This leadership includes managing planning studies and stakeholder governance, particularly critical in the project's initial stages. Additionally, NVTC has successfully integrated the Route 7 BRT project into key regional and state plans, an essential step in securing and activating significant grant funding.

Because NVTC serves as a regional coordinator and advocate for the region's transit operators and jurisdictions, it is well positioned to ensure the Plan reflects the evolution on the corridor. As a result, NVTC will lay out a roadmap for the next steps to both improve bus service in the short term and advance future BRT on Route 7. Accomplishing this requires identifying challenges and roadblocks and documenting steps to resolve them. The document will evolve as discussions continue with stakeholders and policy makers.

Envision Route 7 BRT Project

The Envision Route 7 BRT will be a high-capacity, high-frequency service that runs primarily along Virginia State Route 7 serving riders in four jurisdictions: Fairfax County, the City of Falls Church, Arlington County, and the City of Alexandria. Designed with rail-like features such as dedicated lanes, enhanced stations with off-board fare collection and branded vehicles, BRT will deliver fast, frequent and reliable transit service along a fixed route with the inherent flexibility of a bus.

Specifically, the planned Route 7 BRT service will operate from the Spring Hill Metrorail Station in Tysons through Falls Church, via the East Falls Church Metrorail Station and Seven Corners, down through Bailey's Crossroads to its proposed terminus at Southern Towers / Mark Center in Alexandria. It will integrate with the City of Alexandria's proposed West End Transitway BRT, fostering a seamless regional network. The project will upgrade bus transit service along the 14-mile corridor and connect to major job centers, multiple Metrorail stations and one future BRT service, serving more than 7,500 transit-dependent riders each weekday. By 2040, corridor population and job growth are expected to grow by 35%. As this area grows, BRT is expected to generate approximately 30,000 boardings each day, 25% of those are new trips and two-thirds of which will be for shopping and recreation.

Currently, this portion of Route 7 is one of the busiest transit corridors in Northern Virginia.



Metrobus Route 28A, covering much of this route, has seen a 60% rise in ridership over pre-pandemic levels, defying nationwide trends towards telework and the resulting weakened demand for transit. The corridor links essential services -- education, healthcare, goods and services -- while supporting the regional economy by connecting workers to employment hubs. Transit investments are critical to improving regional employment accessibility, which can lead to positive social equity by unlocking employment opportunities for the transit-dependent, and more generally the transportation-disadvantaged. BRT, with features similar to light rail, offers a more reliable and faster alternative to traditional bus service, avoiding delays that can slow traditional service like traffic congestion or negatively impacted by legacy route choices.

Given that the project spans multiple jurisdictions and requires approval from various local, state and federal entities, close coordination with key planning, funding and policy partners is essential. NVTC works with the following partners now and will continue to do so through the project development process:

- Fairfax County
- City of Falls Church
- Arlington County
- City of Alexandria
- Washington Metropolitan Area Transit Authority (WMATA)
- Transportation Planning Board (TPB)
- Virginia Department of Rail and Public Transportation (DRPT)
- Virginia Department of Transportation (VDOT)
- Federal Transit Administration (FTA)
- Northern Virginia Transportation Authority (NVTA)

Metrobus Route 28A, or the Leesburg Pike Line, currently serves the Route 7 corridor with some deviations, further detailed in the section: “Metrobus 28A Route Alignment.” The 28A provides 12-minute frequencies from 8am to 8pm, and 30-minute frequency at night, covering the entire route in approximately 90 minutes. With 78,730 riders in 2023, the 28A is the second busiest bus route in Northern Virginia, averaging 6,500 daily riders and demonstrating steady growth since 2020, indicating the corridor’s high demand.

Project Planning to Date

Since the project’s inception in 2014, NVTC and its partners have made noteworthy progress. Phases 1 through 3 involved identifying the need for transit, selecting the mode of transit (bus or rail), determining the alignment of a transit facility, and assessing right-of-way requirements. Falls Church provided the initial impetus for Envision Route 7 and Fairfax County conducted its own traffic study related to the project’s implementation in Tysons, which is recognized as Phase 4-0 in NVTC planning documents.

Figure 5: Envision Route 7 BRT Phase 4 Mobility Study Segments

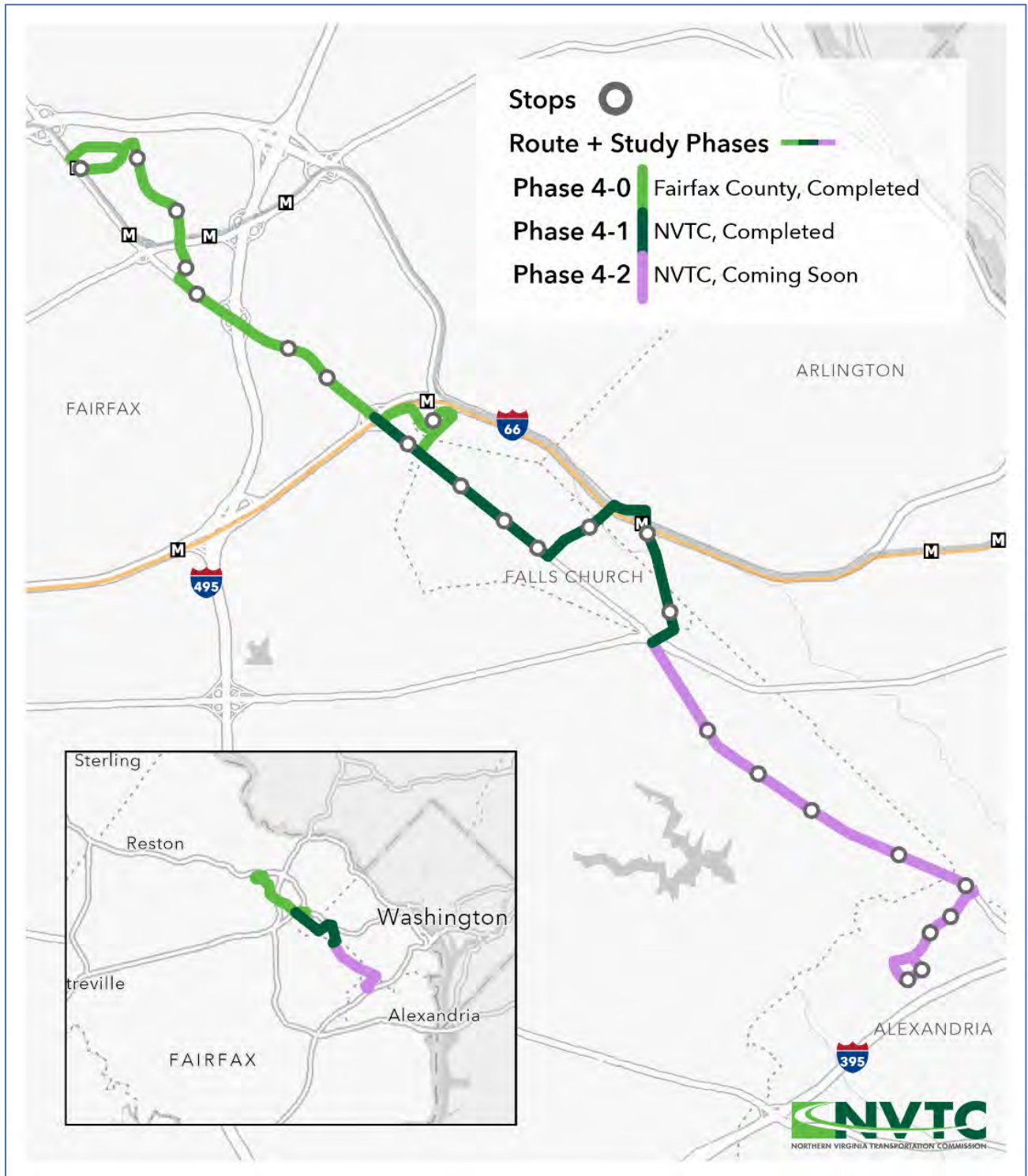


Table 1: Corridor Level Planning and Analysis

Phase 1 (2014)	Feasibility Study and Alternatives Analysis – Assessed the existing conditions and issues and identified a suite of potential transit options to improve mobility and accessibility along the Route 7 corridor.
Phase 2 (2017)	Mode and Alignment – Identified a preferred alignment for the project and selected BRT as the optimal transit mode for the corridor.
Phase 3 (2019)	Conceptual Engineering – Developed planning level drawings, identified right of way needs, refined cost estimates, and documented planning considerations and challenges to be resolved.

Phase 4 analysis divides the corridor into three geographical segments (Figure 5) to define BRT’s mobility benefits, facilitate an understanding of the BRT project and assess its operational impacts along the study corridor. Using microsimulation, the analysis will evaluate and determine the benefits and impacts of the proposed BRT on the alignment. This phase contributes to the planning stage prior to design and construction in the implementation phase.

Table 2: Segment Level Planning and Analysis

Phase 4-0 (2023)	Spring Hill Metrorail Station in Tysons to the Intersection of Route 7 and I-66
Phase 4-1 (2023)	Intersection of Route 7 and I-66 through the City of Falls Church to Seven Corners in Fairfax County
Phase 4-2 (Starting in 2025)	Seven Corners in Fairfax County to Southern Towers/Markk Center in Alexandria

Phase 4-0

In 2023, Fairfax County formally adopted Route 7 (BRT) in its Comprehensive Plan in 2023, endorsing bus priority infrastructure from Spring Hill Metrorail Station, via International Drive to Route 7, continuing south to I-66 and reaching the West Falls Church Metrorail station. NVTC has recognized this work as Phase 4-0, allowing this work to be included in the ongoing planning efforts. In this portion of the corridor, BRT will operate in median running lanes on Route 7 and International Drive, operate in Business Access and Transit (BAT) lanes on the Spring Hill Road and Tyco Road couplet and operate in mixed traffic in the remaining segments around Tysons Urban Center. This infrastructure plan will require the widening of Route 7 (from four lanes to six lanes) from Haycock Road to I-495 to maintain existing service commitments.

Phase 4-1

Phase 4-1, led by NVTC and completed in Fall 2023, provided a detailed mobility analysis of approximately 3.5 miles of the project corridor from just south of Interstate 66 (I-66) through

the City of Falls Church and Arlington County to the Seven Corners area. The study developed three bus priority scenarios that document a range of improvements to bus operations along the segment. NVTC is working closely with the City of Falls Church and Arlington County to integrate the bus priority treatments identified in Phase 4-1 into their own jurisdictional plans. This Strategic Implementation Plan includes additional future analysis and coordination efforts that will be covered in a later section of this document.

Phase 4-2

In 2025, NVTC will launch the Phase 4-2 Mobility Analysis Study which will examine the segment from Seven Corners in Fairfax County to the Mark Center in Alexandria, completing the corridor's mobility analysis. This phase supports the Plan's strategy to identify near-term targeted enhancements to existing bus service on Route 7 and detail opportunities for funding those improvements, while continuing to lay the groundwork for the more capital-intensive work to implement true BRT service on Route 7 in the future. Phase 4-2 will build off previous analysis by NVTC and the Fairfax County Department of Transportation and include the following study objectives (preliminary):

- Define the mobility benefits of BRT and facilitate an understanding of the BRT project.
- Understand the operational impact of BRT along the study corridor.

NVTC is responsible for managing the Community Project Funding and DRPT grant that support this work and will include future scoping of Environmental Analysis work as part of the planning process.

NVTC will undertake the Phase 4-2 mobility study and its subtasks:

1. Identify Alexandria BRT southern terminus (Southern Towers vs. Mark Center).
2. Falls Church Analysis: Business Access and Transit (BAT) vs. HOV, queue jump layout/cross-section.
3. Provide coordination forum to resolve:
 - a. Sycamore/Roosevelt bus priority in Arlington.
 - b. 28A and BRT alignments in Fairfax County and Alexandria.
 - c. Transit connectivity between Columbia Pike and Route 7 bus routes.

Determining the benefits and impact of the Envision Route 7 BRT on future roadway operations along the corridor is important for building consensus and support in the community. For the BRT to be a success, the communities impacted need to see the benefits. To better understand the operations and impacts, a traffic model will be used to determine a set of measure(s) of effectiveness that includes queue length and travel times. This data can be leveraged to identify existing pain points in bus operation and determine solutions. NVTC will initiate work on Phase 4-2 in early 2025 with an estimated completion date of summer 2026.

Project Planning Funding to Date

The project also has significant commitments and financial support from key stakeholders at all levels of government. The four involved jurisdictions — the City of Falls Church, the City of Alexandria, Fairfax County, and Arlington County — have all put local contributions into the project’s planning process. United States Congressional Representatives Don Beyer and Gerry Connolly awarded NVTC \$2 million from the Fiscal Year (FY) 2023 Community Project Funding Program, which was match by a grant from Virginia’s Department of Rail and Public Transportation. This federal funding will be allocated towards final planning and NEPA analysis.

Table 3: Planning Phase Funding Sources

Funding Source	Amount	Fiscal Year Approved
Federal Community Project Funding	\$2,000,000	Fiscal Year 2023
DRPT Technical Assistance Grant	\$500,000	Fiscal Year 2024
Local Match	\$500,000	Fiscal Year 2024 and 2025
TOTAL	\$3,000,000	

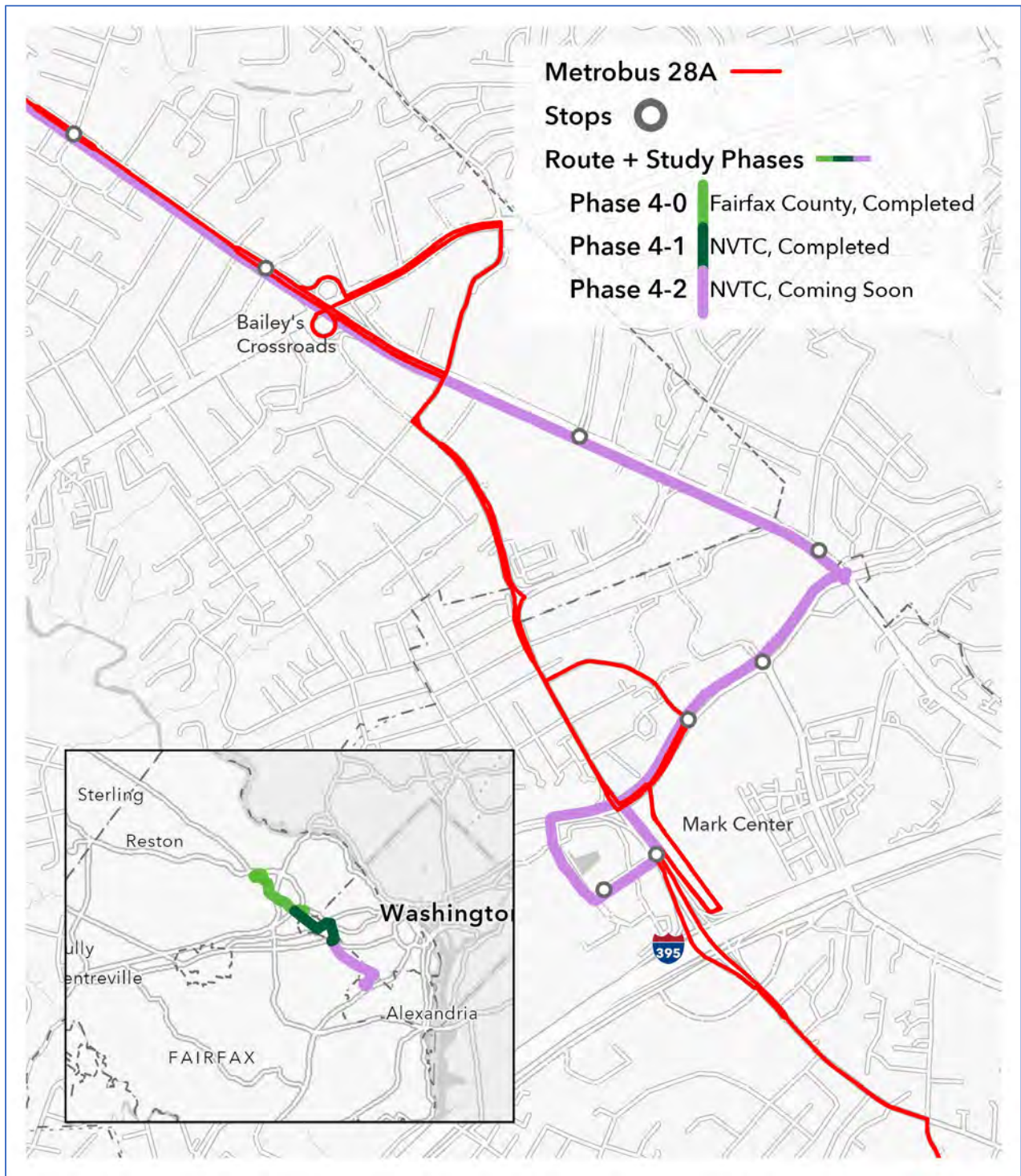
Metrobus 28A Alignment

The current Metrobus 28A route does differ from the proposed BRT route that was identified as the preferred route in earlier NVTC studies. As noted in Figure 6, the Metrobus 28A route has two major deviations from the proposed BRT route at the northwest section. Fairfax County’s plan for BRT in the Tyson’s area extends service north of Tyson’s on International Drive and would connect two Metrorail stations. The service would begin at the Spring Hill Metrorail stop, while the current Metrobus 28A begins its service at Tyson’s Metrorail stop and proceeds south.

In Alexandria, there are substantial differences between the Metrobus 28A route and proposed BRT route, beginning just east of Bailey’s Crossroads at the intersection of Rt 7 and Rt 244, or Columbia Pike. The Metrobus 28A runs briefly on Columbia Pike where it turns on Carlin Springs Roads and proceeds south, passing Rt 7, and following on Seminary Road east until it enters Alexandria. In Alexandria, the bus takes Filmore Ave to serve the residential complex at Southern Towers. The bus stops within the parking lot for the complex and then proceeds east on Seminary Road, taking North Howard Street south and eventually taking Duke Street east to terminate at the Old Town Metrorail station. The BRT’s future alignment within Alexandria will be decided in Phase 4-2, with the goal of finding a simplified route for the Metrobus 28A as well as leveraging the two planned high frequency bus corridors (Envision Route 7 and West End Transitway) to enhance the customer experience.

Of note, upon implementation of the first phase of WMATA’s Better Bus Network Redesign, the current Metrobus 28A route will be renumbered as Metrobus F20 route.

Figure 6: Map of Envision Rt 7 BRT versus the Route for Metrobus 28A



Better Bus Now: Tactical Near-Term Improvements

To implement improvements more quickly to bus service on Route 7, NVTC proposes inverting the traditional transit capital project delivery model as shown in Table 4. This is feasible and advisable due to multiple levers on cost, including coordination amongst four jurisdictions, variations in roadway design in different sections of the corridor along with complications caused by legacy infrastructure.

Rather than funding improvements to bus service on Route 7 as a large-scale, single package that moves step-by-step through a detailed capital project process, NVTC proposes that the jurisdictions and bus operator implement smaller-scale, tactical capital projects and operational enhancements to improve bus service on Route 7 such as transit-signal priority, queue jumps, and bus stop amenities.

Table 4: Traditional Capital Project Phases

Phase 1 - Feasibility Study (2014)
Phase 2 - Travel Demand Analysis Mode and Alignment (2017)
Phase 3 - Conceptual Engineering (2019)
Phase 4 - Mobility Study & Strategic Implementation Plan
Phase 5 - Preliminary Design and Environmental Analysis
Phase 6 - Final Design
Phase 7 - Construction
Phase 8 - Service Planning
Phase 9 – Operation

Figure 7: Map of Planned and Funded Metrobus 28A Capital Projects

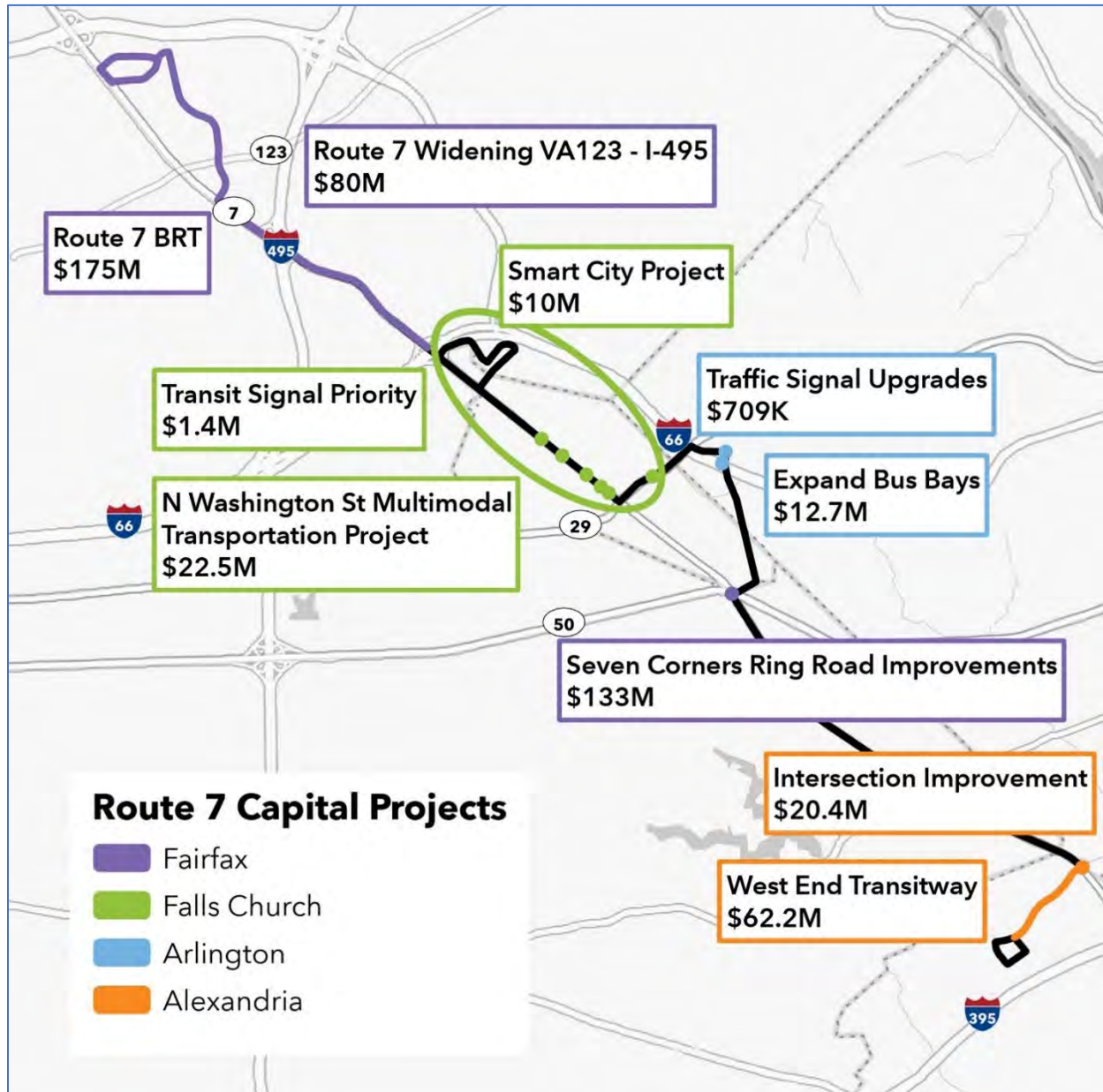
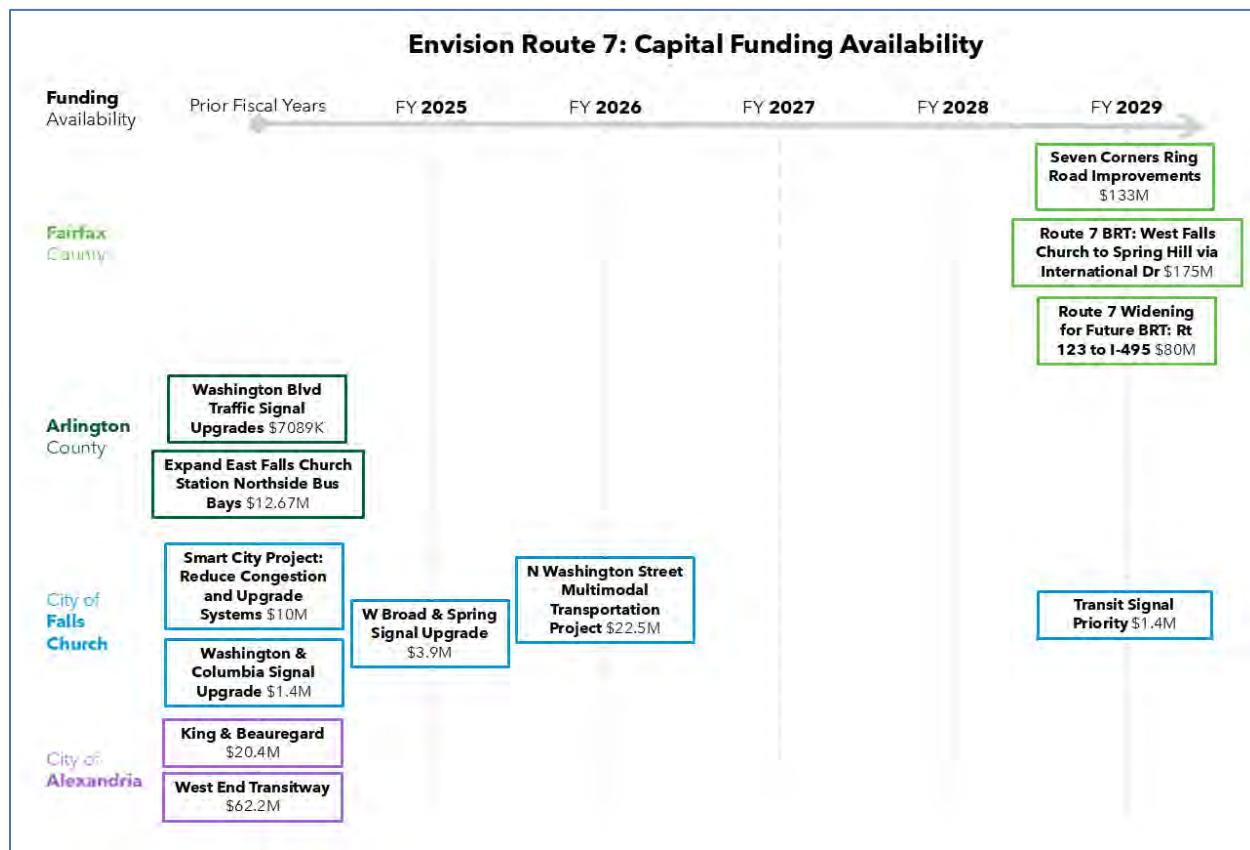


Figure 8: Planned and Funded Metrobus 28A Capital Projects by Funding Year



Projects by Jurisdiction

NVTC has identified specific capital and operational projects within each jurisdiction that will improve bus service on the corridor. The projects listed provide direct benefits to Metrobus 28A; some of the listed improvements with higher capital amounts also enable or deliver BRT along the corridor. NVTC, working with each jurisdiction, has identified next steps for escalation and resolution by the jurisdiction. By working across jurisdictional boundaries with the local governments that would be responsible for constructing the improvements identified below, NVTC aims to serve as a regional coordinating entity to advance individual projects on Route 7 that establishes a foundation for future BRT in the corridor while also improving existing bus service.

Fairfax County

Capital Funding Awarded		
Project	Amount	Source
Route 7 widening for Future BRT (Route 123 to I-495) • Design of BRT and bike/pedestrian facilities	\$80 M	State, Local and NVTA 70% Funds
Route 7 BRT, from West Falls Church to Spring Hill, via International Drive	\$175 M	State, Local and NVTA 70% Funds
Seven Corners Ring Road Improvements	\$133 M	State, Local and NVTA 70% Funds

Fairfax County has the following projects included in their respective area plans:

1. Coordinate with NVTC for environmental analysis of Phase 4-0 and analyze Right-of-Way impacts and lane configuration along the BRT corridor.
2. Advance transportation improvements in the Seven Corners area for all roadway users

Fairfax County Department of Transportation's (FCDOT) completion of their 10% conceptual plans for BRT from West Falls Church to Spring Hill Metrorail Station will provide a better understanding of right-of-way impacts and create a foundation for advancing the design into preliminary engineering and examining environmental impacts. For Seven Corners, a phasing analysis was completed in 2023 to determine the projected order in which transportation improvements should be implemented in the Seven Corners area to improve operations and mobility for all roadway users, including transit.

FCDOT staff have been focused on implementing the Richmond Highway BRT project (RHBRT), which is forecasted to be complete in 2031. Lessons learned from RHBRT will benefit the continued development of Envision Route 7 BRT, ranging from VDOT coordination to funding considerations. Additionally, the completion of RHBRT will allow for additional staff resources to advance the Route 7 BRT into implementation.

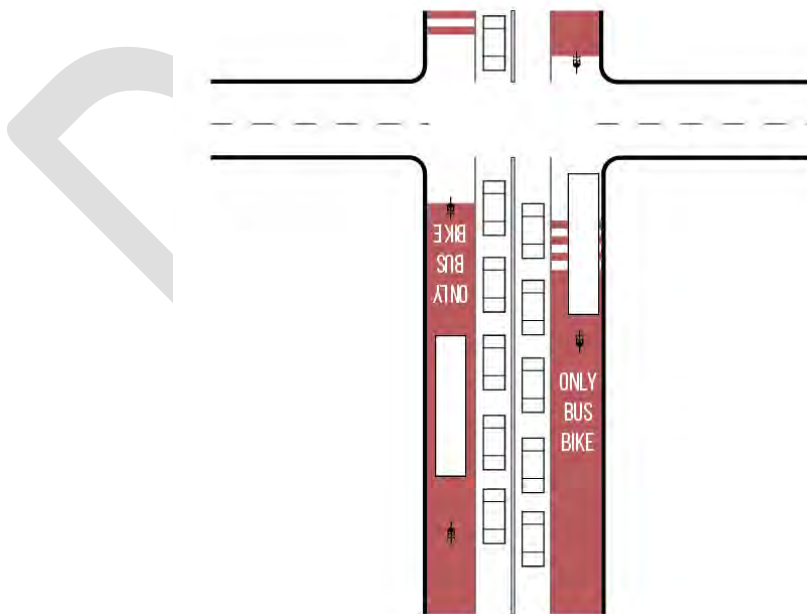
City of Falls Church

Capital Funding Awarded		
Project	Amount	Source
Smart City Project - Reduce congestion and upgrade systems	\$10 M	Federal and State
Transit Signal Priority	\$1.4 M	NVTA 70% Funds
North Washington Street Multimodal Transportation project	\$22.5 M	NVTA 70% Funds
Washington & Columbia Signal Upgrade	\$1.4 M	State and Local
W Broad & Spring Signal Upgrade	\$1.8 M	State and Local

Falls Church and NVTA are working together on a follow-up analysis to determine what form of restricted traffic lane could apply in the jurisdiction.

1. Coordinate with NVTC on analysis for Transit and Multi-modal improvements to benefit Metrobus 28A (BAT vs. HOV; layout for queue jump and feasibility for bike/bus lanes.
 - a. Note: Falls Church is evaluating options, including but not limited to HOV hours of operation, impacts of BAT lanes and potential for shared bike/bus lane.

Figure 10: Artist Illustration of Shared Bus/Bike Facility, courtesy National Association of City Transportation Officials (NACTO)



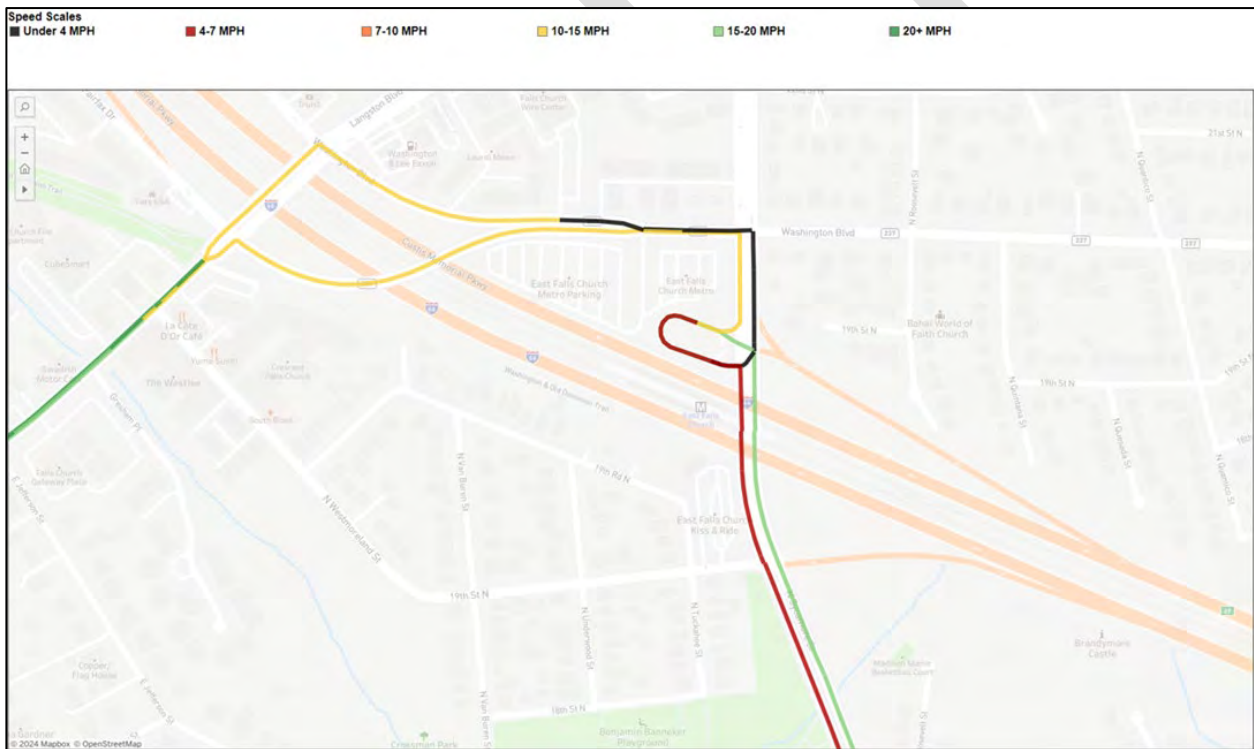
Arlington County

Capital Funding Awarded		
Project	Amount	Source
Traffic Signal Upgrades - Washington Blvd	\$709 K	Local and NVTA 30% Funds
Expand bus bays by 75%	\$12.67 M	Local and NVTA 30% Funds

Arlington County and NVTC are collaborating with applicable partners to resolve issues identified during the previous planning process.

1. Resolve bus slowdown at Washington Blvd. and N. Sycamore Street
2. Investigate short- and long-term bus bay capacity at East Falls Church Metro

Figure 11: Image: WMATA Utilizing Bus Speed Data



City of Alexandria

Capital Funding Awarded		
Project	Amount	Source
King & Beauregard intersection enhancements	\$20.4 M	Federal, State, and Local
West End Transitway	\$62.2 M	State, Local and NVTA 70% Funds

The City of Alexandria and NVTC are working together to resolve these identified concerns:

1. Identify the Northbound BRT station at intersection of King and Beauregard
2. Identify southern terminus for BRT (Southern Towers vs. Mark Center)

The West End Transitway BRT project is a 5.3-mile corridor running from the Van Dorn Street Metrorail Station in the south to the Pentagon Metrorail Station in the north. The project includes fifteen stations with stops at key destinations including the Shirlington Transit Center and the Mark Center. Currently in design, completion of the West End Transitway by 2027 will provide the Metrobus 28A riders with the benefits of enhanced transit service and amenities to improve service to the Mark Center. Important considerations are coordinating the Metrobus 28A route with other bus routes on the corridor and maintaining the level of service and coverage.

Funding Timeline

Fairfax County								
Capital Funding Awarded								
Project	Amount	Source	Prior FY	FY 25	FY 26	FY 27	FY 28	FY 29
Route 7 widening for Future BRT (Route 123 to I-495) Design of BRT and bike/pedestrian facilities	\$80m	State, Local and NVTA 70% Funds						\$80m
Route 7 BRT Route 7, from West Falls Church to Spring Hill, via International Drive	\$175m	State, Local and NVTA 70% Funds						\$175m
Seven Corners Ring Road Improvements	\$133m	State, Local and NVTA 70% Funds						\$133m
Falls Church								
Capital Funding Awarded								
Project	Amount	Source	Prior FY	FY 25	FY 26	FY 27	FY 28	FY 29
Smart City Project - Reduce congestion and upgrade systems	\$10m	Federal and State	\$10m					
North Washington Street Multimodal Transportation project	\$22.5m	NVTA 70% Funds			\$22.5m			
Washington & Columbia Signal Upgrade	\$1.4m	State and Local	\$1.4m					
W Broad & Spring Signal Upgrade	\$3.9m	State and Local		\$1.8m	\$1.8m	\$328k		
Transit Signal Priority	\$1.4m	NVTA 70% Funds						\$1.4m
Arlington County								
Capital Funding Awarded								
Project	Amount	Source	Prior FY	FY 25	FY 26	FY 27	FY 28	FY 29
Traffic Signal Upgrades - Washington Blvd	\$ 709k	Local and NVTA 30% Funds	\$709k					
Expand bus bays from Four to Seven - east falls station north side	\$12.67m	Local and NVTA 30% Funds	\$12.67m					
City of Alexandria								
Capital Funding Allocated								
Project	Amount	Source	Prior FY	FY 25	FY 26	FY 27	FY 28	FY 29
King & Beaugard	\$20.4m	Federal, State and Local	\$19.9m	\$1.5m				
West End Transitway	\$62.2m	State, Local and NVTA 70% Funds	\$24.5m	\$32.6m	\$5.0m			

External Agency Coordination

Since the inception of the Envision Route 7 BRT project, NVTC has actively coordinated with many regional, state and federal partners to ensure the successful planning and eventually delivery of the Envision Route 7 BRT. In each of these instances, NVTC has included and will continue to include staff from the following partnering agencies on its technical advisory committees.

Washington Metropolitan Area Transit Authority (WMATA)

NVTC is coordinating with WMATA to enhance Metrobus 28A service as well as any future skip stop or express service that could augment existing bus service on the corridor. This includes incorporating NVTC's BRT alignment into the Bus Network Redesign effort and investigating the feasibility of higher frequency bus service with an associated funding mechanism to enable additional service. While the Metrobus 28A has high ridership and frequent service, it makes frequent stops which causes delays as it moves through the corridor. NVTC and WMATA aim to address these and any other operational pain points to improve bus service and coordination with operations staff.

WMATA has undertaken the first comprehensive redesign of the entire Metrobus network since its creation. The proposed 2025 Better Bus Network represents WMATA's commitment to improving service and connections using resources currently available. As staff considers where, when, and how people travel in the region, there is an opportunity to align the Metrobus 28A (tentatively retitled the F20) as part of the overall effort. With a vision map released in May 2024 and community conversations ongoing, there is an opportunity to integrate Envision Route 7 within the re-design effort to deliver improved bus operations in the near term.

Federal Transit Administration (FTA)

FTA administers NVTC's \$2 million FY 2023 Community Project Funding grant for the Phase 4-2 planning efforts. Because of the potential for future federal funding, NVTC is actively engaged in discussion with FTA on additional funding opportunities and partnership models, including best practices for effective project management and regional coordination. Both the FTA and its parent organization, the Department of Transportation (USDOT), stand as critical potential partners for the implementation stages, with various funding pathways that require detailed planning and documentation to meet eligibility criteria.

National Capital Area Transportation Planning Board (TPB)

TPB has the Envision Route 7 Bus Rapid Transit included in the May 2024 Transportation Improvement Program (TIP) with TIP ID: T13608. The TIP establishes federal funding eligibility for Envision Route 7 and is required to activate the federal FY 2023 Community Project Funding.

The Virginia Department of Rail and Public Transportation (DRPT)

DRPT is sponsoring the study for inclusion in TPB's TIP, alongside providing a local grant to leverage federal funding during the planning phases. DRPT not only serves as a crucial support partner in advancing this regional project but is also a potential funding partner for its implementation.

The Virginia Department of Transportation (VDOT)

VDOT plays an integral role in the Envision Route 7 BRT project, as the Route 7 roadway is owned and maintained by the Virginia Department of Transportation (VDOT) except through the cities of Falls Church and Alexandria.

The Northern Virginia Transportation Authority (NVTA)

NVTA develops a long-range transportation plan for Northern Virginia, called TransAction, that outlines a vision to address traffic congestion and other regional transportation priorities. TransAction is updated every five years. Inclusion in TransAction is a prerequisite for future Authority funding, as noted below. The Route 7 BRT is currently included in NVTA's latest TransAction plan and is expected to be included in the future update to be developed in 2025.

Future Funding Opportunities

For future funding, there are multiple grant programs available to fund either design or construction work for each jurisdiction to fund their respective Envision Route 7 BRT features. Listed below are state and regional grant opportunities, however there are also federal sources, such as the Rebuilding American Infrastructure with Sustainability and Equity (RAISE) grant that could provide additional resources to advance transportation in the region.

1. The U.S. Department of Transportation (USDOT)'s Rebuilding American Infrastructure with Sustainability and Equity (RAISE) discretionary grant program may be a candidate for future Envision Route 7 planning and/or capital project funding. The latest criteria were established by the Biden Administration to fund a diverse slate of communities with projects of local and regional significance. Funding is split equally between urban and rural areas, and a large percentage of grants support regions defined as historically disadvantaged or areas of persistent poverty. The eligibility requirements of RAISE allow project sponsors, including state and local governments, counties, Tribal governments, transit agencies, and port authorities, to pursue multi-modal and multi-jurisdictional projects that are more difficult to fund

through other grant programs. The future of this program does depend on Congressional appropriations support as well as the administration's priorities.

2. The Federal Transit Administration (FTA) is a potential funding partner for engineering design and construction phases of the project, with the possibility of entering the Capital Investment Grants (CIG) program. While the CIG program funds transit heavy rail, commuter rail, light rail, streetcars and bus rapid transit, agencies seeking CIG funding to complete a series of steps over several years. The future funding available to this program does depend on the availability of Congressional appropriations.
3. The Department of Rail and Passenger Transportation (DRPT) operates the Making Efficient and Responsible Investments in Transit (MERIT) program. This is a statewide grants program that provides financial assistance to support public transportation services throughout Virginia. Within the grant program there are options for Operating Assistance, Capital Assistance, and Demonstration Project Assistance and Technical Assistance. DRPT also operates the Transit Ridership Incentive Program (TRIP), which provides funding for the purpose of creating more accessible, safe, and regionally significant transit networks. TRIP funds four project categories: zero and reduced fare, regional connectivity, public safety, and passenger amenities and facilities. DRPT accepts applications for Capital Assistance on October 1st and other portions of the program on December 1st.
4. The Office of the Virginia Secretary of Transportation administers the SMART SCALE program that funds capital projects focused on capacity and operational improvements for roadways, transit, bicycle and pedestrian programs, and transportation demand management. The program is a tool that allows the state to balance transportation needs and prioritize investments by using a transparent and objective scoring system for planned projects included in Virginia's long-range transportation plan or VTrans. Project selection is based upon criteria associated with Safety, Congestion reduction, Accessibility, Land use, and Economic development and the Environment, with funding for projects approved by the Commonwealth Transportation Board (CTB). The Application window opens in April of even-numbered years through August. After the application window closes, submissions are screened by staff and scored with public hearings to follow, culminating in the CTB selecting projects by the Summer of the odd-numbered year, with the cycle repeating the next even-numbered year.
5. Northern Virginia Transportation Commission (NVTC) operates the I-66 Commuter Choice program which funds transit and other transportation improvements that move more people, enhance mobility, expand commuters' travel options, and increase travel safety and reliability along I-66 and parallel routes. Bus priority improvements – such as signal priority, dedicated lanes, and queue jumps – would be eligible for program support to the extent that they have a nexus to I-66 Inside the Beltway peak-period, peak-direction travel, and further program goals. This funding

source can augment operation funding to provide more frequent service. Projects are selected through a competitive process and applications are anticipated to begin in the Fall of 2025 and adhere to a two-year cycle.

6. Northern Virginia Transportation Authority (NVTA) has two funding mechanisms which provide funding for both long- and short-range projects. “70% Regional Revenue,” is allocated by the Authority for regional transportation projects selected by a competitive process and “30% Local Distribution Revenue” is distributed to jurisdictions for eligible transportation projects and purposes. This financing source may only fund capital expansion projects that support congestion reduction; 70% funding cannot be used for operations. Either the 70% Regional Revenue funding stream or the 30% Local Distribution Revenue could be leveraged by local jurisdictions to construct improvements on Route 7.
7. Additionally, NVTA is responsible for recommending the allocation of federal funds from two key programs: The Congestion Mitigation and Air Quality (CMAQ) Improvement Program and the Regional Surface Transportation Program (RSTP). Both types of federal funds can be used on transit capital projects. Projects considered for funding under these programs come directly from the jurisdictions.

Strategic Implementation Plan: A Living Document

NVTC’s Strategic Implementation Plan will continue to evolve with input from local jurisdictions regarding responsibilities for construction, operation and maintenance. NVTC’s ultimate strategy is to have BRT operational on the corridor, with bus priority treatments constructed on the route on an independent timeline. The Plan helps achieve this by identifying near-term targeted enhancements to existing bus service on Route 7 and detail opportunities for funding those improvements, while continuing to lay the groundwork for the more capital-intensive work to implement true BRT service on Route 7 in the future. With multiple jurisdictions, it would be challenging to coordinate design, procurement and construction across the region as one project. The Plan allows for flexibility by respecting each jurisdiction’s competing needs and priorities with an overall goal of improving bus service on the corridor.

NVTC will continue to update the NVTC Commission (including adoption actions), the NVTC Program Advisory Committee & Management Advisory Committee along with city/county boards, as invited. Lastly, NVTC will oversee the execution of the Strategic Implementation Plan and its progress.



AGENDA ITEM #7 Virginia Railway Express (VRE)

TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice and Rhonda Gilchrest
DATE: October 31, 2024
SUBJECT: Virginia Railway Express (VRE)

At the November 2024 meeting, VRE staff will update the Commission on recent VRE activities, including the introduction of the draft 2025 VRE Legislative Agenda. There are no VRE actions requested this month.

A. VRE CEO Report and Minutes

VRE Chief Executive Officer Rich Dalton will provide his report on recent VRE activities. The [VRE CEO Report for October 2024](#) and the [Minutes of the October 18, 2024 VRE Operations Board meeting](#) are attached.

B. Draft 2025 VRE Legislative Agenda

The VRE Legislative Committee and VRE staff updated the Operations Board on the status of the attached [Draft 2025 VRE Legislative Agenda](#) at the October 18 Board meeting. Each year prior to the start of the Virginia General Assembly Session, the VRE Operations Board formulates and recommends to the Commissions its priorities to better communicate and influence the actions of the governor's administration and the General Assembly. This Legislative Agenda will serve as guidance for staff and the contracted legislation liaisons during the legislative session. The Commissions will be asked to approve the VRE Legislative Agenda at their respective December meetings.

In addition, the Legislative Agenda includes federal legislative and regulatory issues that are relevant to transit and commuter rail in the U.S., and VRE specifically. Throughout the year, VRE staff and its contracted federal relations consultants will work with the U.S. Department of Transportation and its agencies, the Northern Virginia Congressional delegation, relevant Congressional committees, and others to educate them on these issues and their potential impacts to VRE.

CEO REPORT

OCTOBER 2024



MISSION

The Virginia Railway Express, a joint project of the Northern Virginia Transportation Commission and the Potomac Rappahannock Transportation Commission, will provide safe, cost-effective, accessible, reliable, convenient, and customer responsive commuter-oriented rail passenger service. VRE contributes to the economic vitality of its member jurisdictions as an integral part of a balanced, intermodal regional transportation system.



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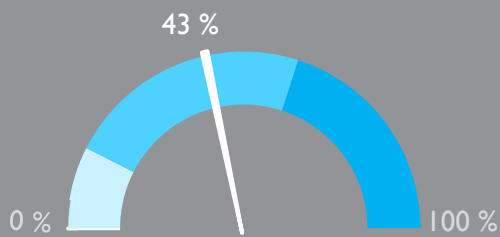
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VIRGINIA RAILWAY EXPRESS
A better way. A better life.

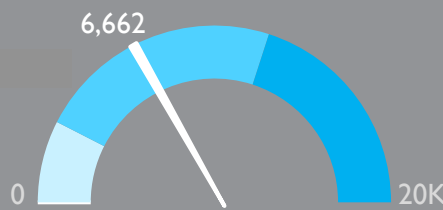


PERFORMANCE AT A GLANCE



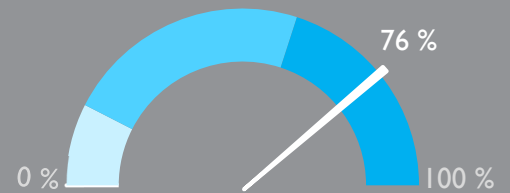
PARKING UTILIZATION

The total number of parking spaces used in the VRE system during the month, divided by the total number of parking spaces available.



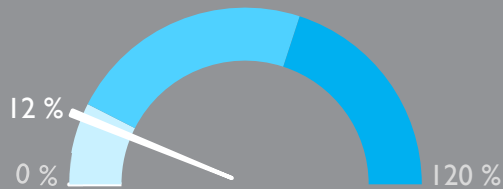
AVERAGE DAILY RIDERSHIP

The average number of boardings each operating day inclusive of Amtrak Step-Up boardings and reduced, "S" schedule, service.
Same month, previous year: 6,316



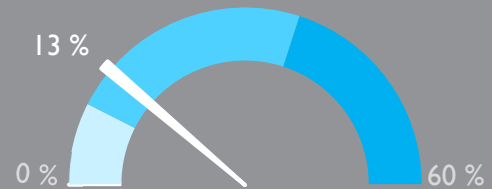
ON-TIME PERFORMANCE

Percent of trains arriving at their destination within 5 minutes of the schedule.
Same month, previous year: 79%



SYSTEM CAPACITY

The percentage of peak hour train seats occupied. The calculation excludes reverse flow and non-peak hour trains.



OPERATING RATIO

Through September 2024

Year-to-date operating revenues divided by year-to-date operating expenses, which represents the share of operating costs paid by the riders.

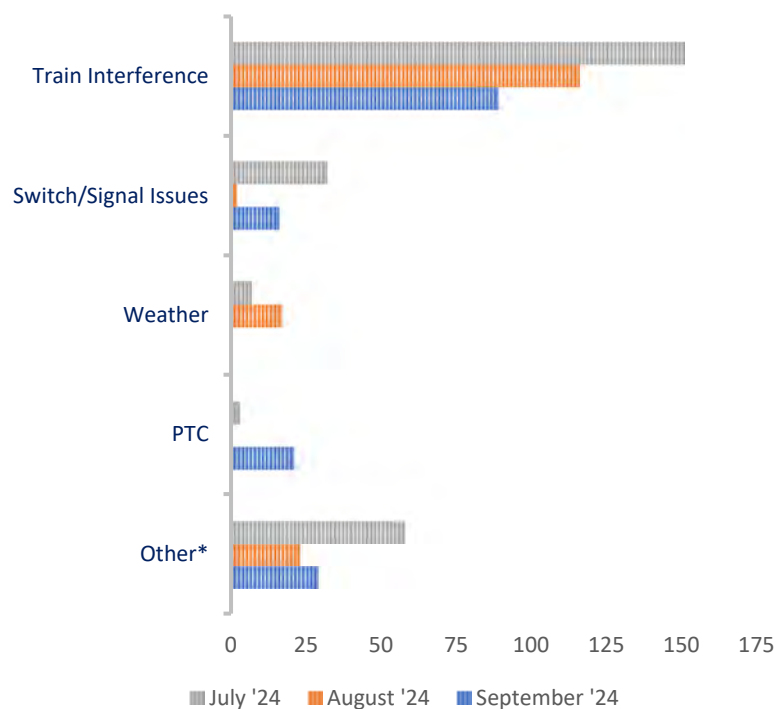
September 2024

ON-TIME PERFORMANCE

OUR RECORD

	September 2024	August 2024	September 2023
Manassas Line	76%	74%	78%
Fredericksburg Line	76%	80%	80%
Systemwide	76%	77%	79%

PRIMARY REASON FOR DELAY



VRE operated 636 trains in September. The on-time rate for the month was 76 percent.

One hundred fifty-five trains arrived more than 5 minutes late to their final destinations. Of those late trains, 77 were on the Manassas Line (50 percent), and 78 were on the Fredericksburg Line (50 percent). The average delay was 16 minutes. 17 trains were more than 30 minutes late to their destination station.

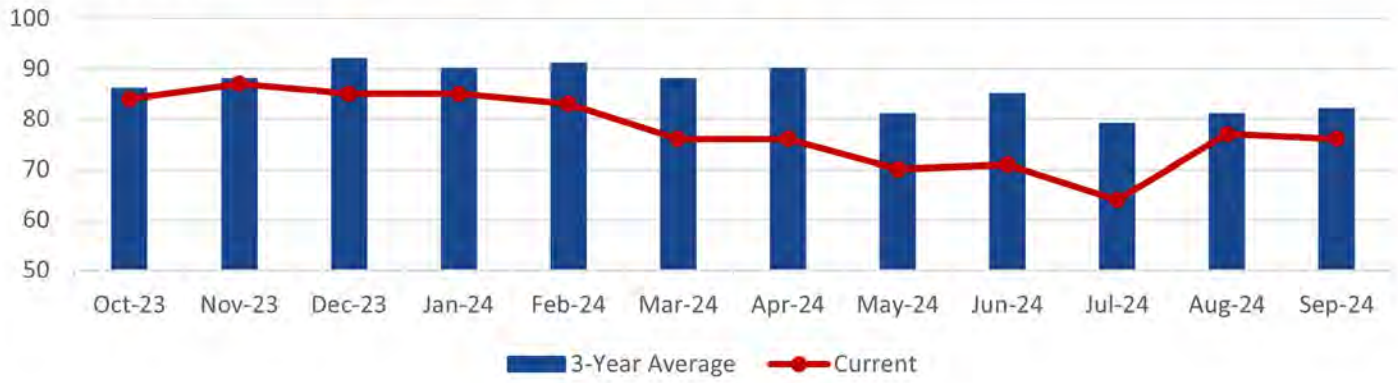
*Includes trains that were delayed due to operational testing and passenger handling.

LATE TRAINS

	System Wide			Fredericksburg Line			Manassas Line		
	July	Aug.	Sept.	July	Aug.	Sept.	July	Aug.	Sept.
Total late trains	251	158	155	109	70	78	142	88	77
Average minutes late	19	23	16	16	29	17	21	18	14
Number over 30 minutes	40	24	17	11	13	12	29	11	5
Heat restrictions	10	8	0	10	8	0	0	0	0

ON-TIME PERFORMANCE

VRE SYSTEM



FREDERICKSBURG LINE



MANASSAS LINE



AVERAGE DAILY RIDERSHIP

VRE SYSTEM



FREDERICKSBURG LINE



MANASSAS LINE



RIDERSHIP UPDATES

Average daily ridership for September was 6,662. There were 20 service days.

	September 2024	August 2024	September 2023
Monthly Ridership	133,247	132,674	126,328
Average Daily Ridership	6,662	6,031	6,316
Bicycles on Trains	1,404	1,422	1,471
Full Service Days	20	22	20
“S” Service Days	0	0	0

SUMMONSES ISSUED

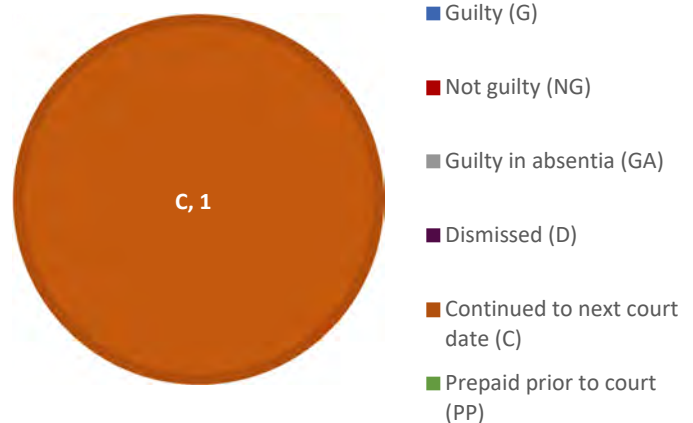
VRE SYSTEM



SUMMONSES WAIVED OUTSIDE OF COURT

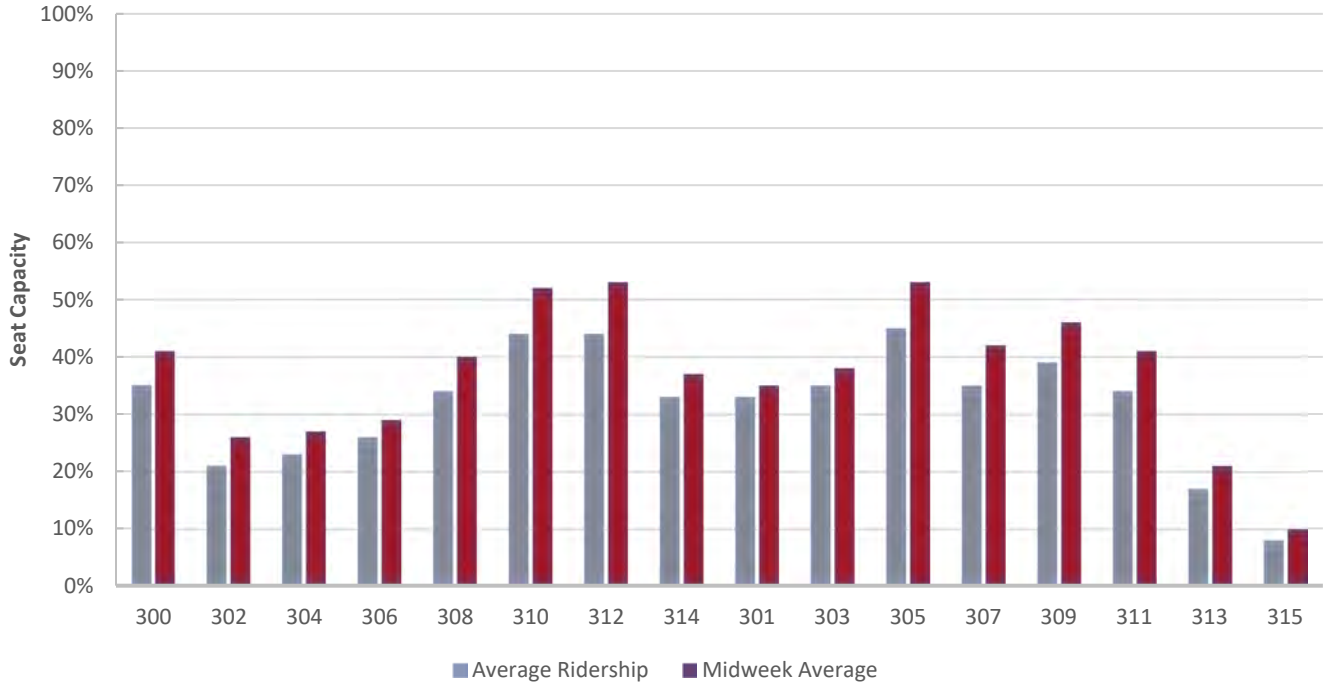
Reason for Dismissal	Occurrences
Passenger showed proof of a monthly ticket	0
One-time courtesy	1
Per the request of the conductor	0
Defective ticket	0
Per ops manager	0
Unique circumstances	0
Insufficient information	0
Lost and found ticket	0
Other	0
Total Waived	1

MONTHLY SUMMONSES COURT ACTION

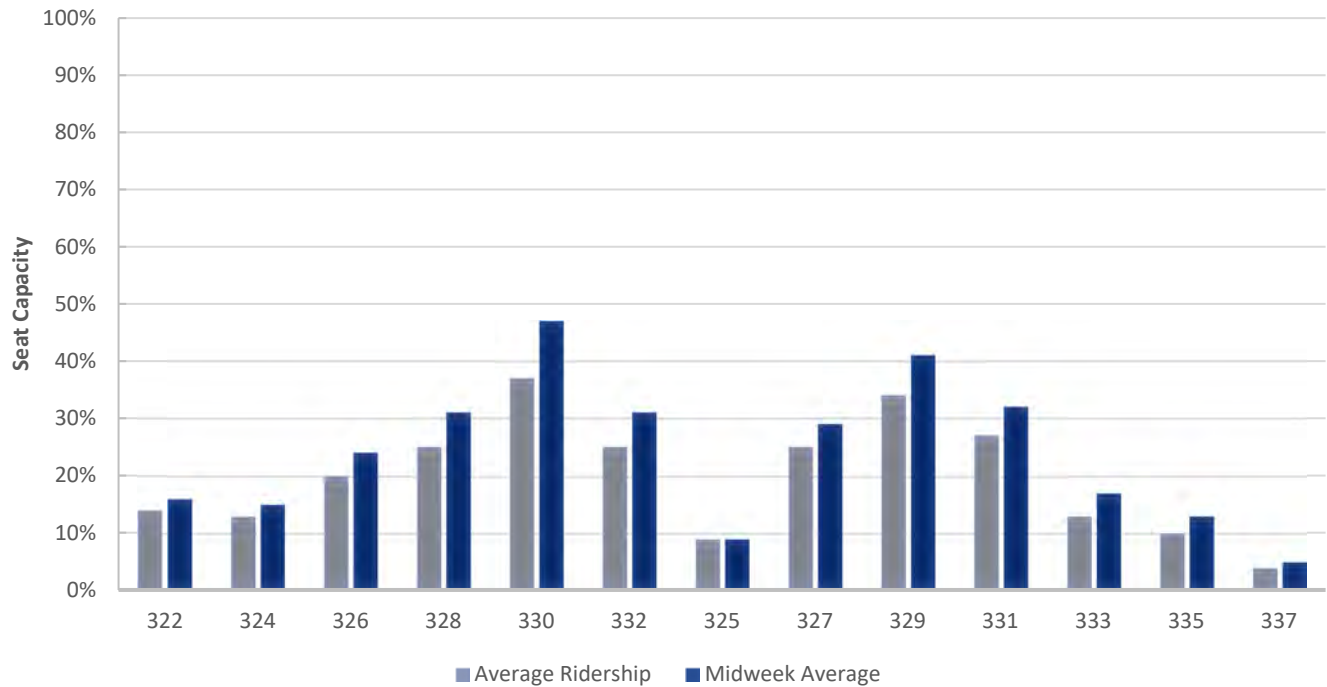


TRAIN UTILIZATION

FREDERICKSBURG LINE

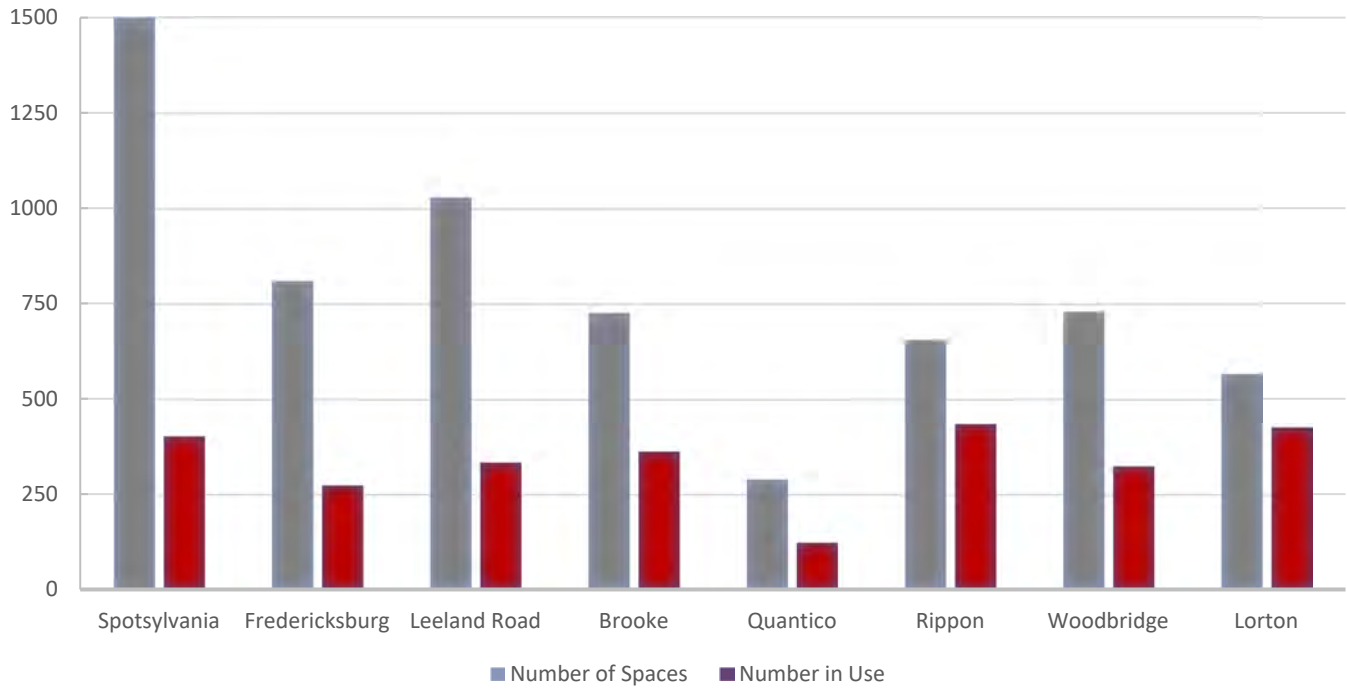


MANASSAS LINE

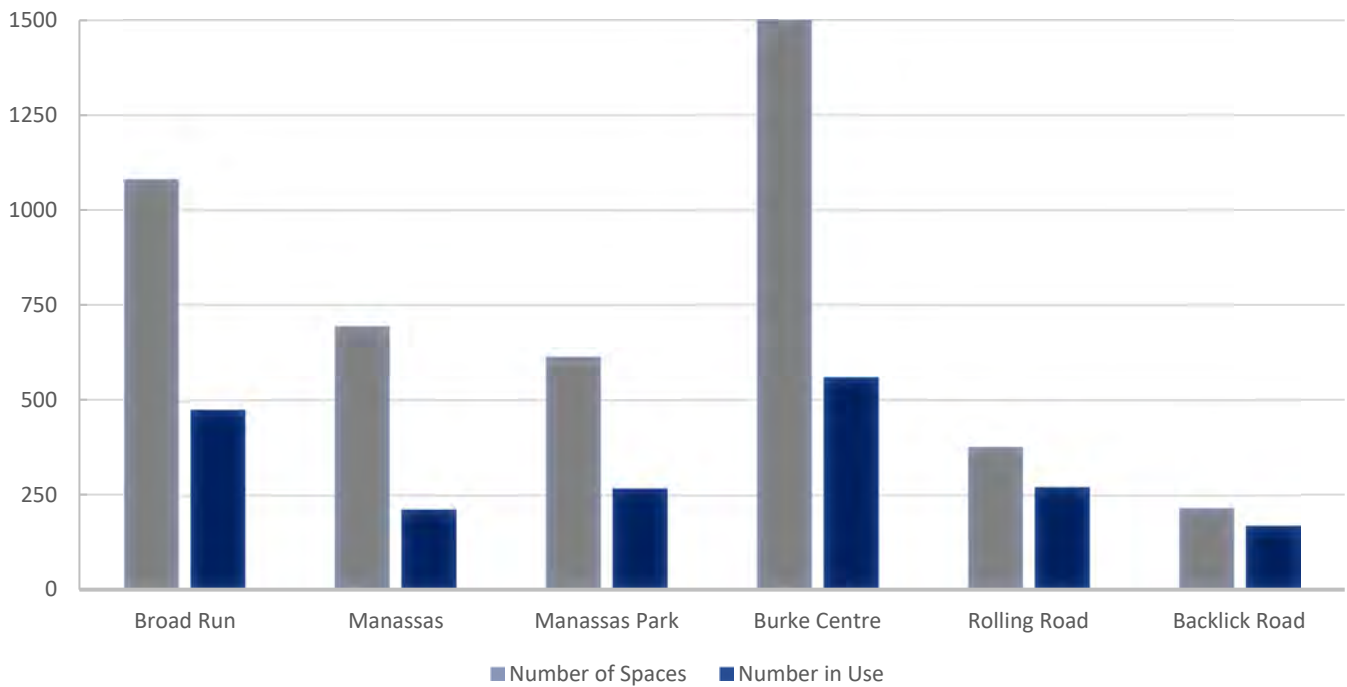


PARKING UTILIZATION

FREDERICKSBURG LINE



MANASSAS LINE



FINANCIAL REPORT FOR SEPTEMBER 2024

Fare revenue through the end of the first quarter of FY 2025 (September 2024) is approximately \$2.0 million below the approved budget level (an unfavorable variance of -35%) and is 1.6% above the same period in FY 2024. This increase in passenger revenue over FY 2024 Q1 is closely correlated to the 2.4% increase in ridership over the same period. Average daily ridership through the first quarter of FY 2025 was 6,254, as compared to 6,206 for the same period in FY 2024 and 5,611 for the same period in FY 2023.

The operating ratio for the first three months of FY 2025 is 13%, which is below VRE's approved FY 2025 budget operating ratio of 22% for the full fiscal year. VRE is normally required to budget a minimum operating ratio of 50%, but this requirement has been waived for FY 2025 because of the effects of the pandemic.

A summary of the FY 2025 financial results through the end of September 2024 follows, including information on major revenue and expense categories. Please note that these figures are preliminary and unaudited.

FY 2025 Operating Budget Report							
Month Ended September 30, 2024							
	CURR. MO. ACTUAL	CURR. MO. BUDGET	YTD ACTUAL	YTD BUDGET	YTD \$ VARIANCE	YTD % VARIANCE	TOTAL FY25 BUDGET
Operating Revenue							
Passenger Ticket Revenue	1,300,833	1,828,609	3,830,398	5,866,788	(2,036,390)	-34.7%	23,010,000
Other Operating Revenue	2,075	13,272	1,224	42,579	(41,356)	-97.1%	194,000
Subtotal Operating Revenue	1,302,908	1,841,881	3,831,622	5,909,368	(2,077,746)	-35.2%	23,204,000
Jurisdictional Subsidy (1)	-	-	9,714,425	9,334,075	380,350	-4.1%	13,416,160
Federal/State/Other Jurisdictional Subsidy	2,705,937	3,068,871	8,440,461	8,991,464	(551,003)	-6.1%	43,105,317
Appropriation from Reserve/Other Income	1,959,726	2,165,543	12,341,216	14,647,785	(2,306,568)	-15.7%	34,949,753
Interest Income	352,239	298,013	1,038,392	956,126	82,266	8.6%	3,750,000
Total Operating Revenue	6,320,811	7,374,308	35,366,116	39,838,817	(4,472,701)	-11.2%	118,425,230
Operating Expenses							
Departmental Operating Expenses	8,152,179	7,955,226	28,597,246	31,843,897	3,246,651	10.2%	104,603,570
Debt Service	1,142,972	1,142,972	3,428,915	3,428,915	-	0.0%	13,715,660
Other Non-Departmental Expenses	-	-	-	-	-	0.0%	106,000
Total Operating Expenses	9,295,151	9,098,198	32,026,161	35,272,812	3,246,651	9.2%	118,425,230
Net Income (loss) from Operations	(2,974,340)	(1,723,889)	3,339,955	-4,566,005	(1,226,051)		-
Operating Ratio			13%	19%		Budgeted	22%
						Goal	50%

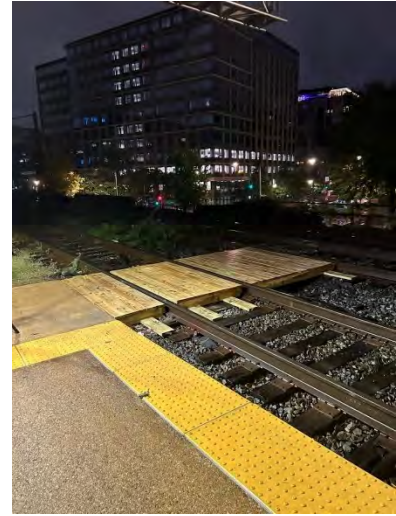
(1) Total jurisdictional subsidy is \$18,300,780. Portion shown as budgeted and actual are attributed to Operating Fund only.

FACILITIES UPDATE

The following is a status update of VRE facilities projects.

Completed projects:

1. Replacement of timber pedestrian crossings at L'Enfant and Crystal City stations
2. Trimming of trees in Woodbridge station surface parking lot
3. Milling and paving of Quantico station parking lot
4. Improvements to various interior elements of Quantico station
5. Painting of crew building exterior at Crossroads MASF
6. Installation of cabinetry in crew building and LOU building at Crossroads MASF



L'Enfant station pedestrian crossing replacement

Projects scheduled to be completed this quarter:

1. Replacement of stair tower and pedestrian bridge logo signs at Woodbridge station, pending CSX track protection availability
2. Replacement of existing high bay lighting in warehouse at Crossroads MASF
3. Pressure washing of warehouse at Crossroads MASF
4. Replacement of vehicle gate motor at Crossroads MASF
5. Replacement/installation of pathfinder signage for multiple stations
6. Replacement of parking lot entrance signs at Woodbridge, Brooke, Leeland Road and Manassas Park stations



Quantico station parking lot paving and striping

Projects scheduled to be initiated this quarter:

1. Replacement of LED lighting at Woodbridge station parking garage
2. Repairs to stairs at Franconia-Springfield and Woodbridge stations
3. Repairs to steel railings at Leeland Road station
4. Replacement of existing lighting with LED lighting at Manassas station parking garage
5. Repairs to steel railings at Broad Run station

Ongoing projects:

1. Modernization of east elevator at Woodbridge station
2. Improvements to various exterior elements of Quantico station
3. Improvements to various elements of Manassas Park station

UPCOMING PROCUREMENTS

1. Locomotive AR-10 parts
2. Modernization of Woodbridge Station east elevator
3. Construction of Alexandria Station improvements
4. Broad Run and Crossroads security camera system power and network infrastructure upgrade
5. Locomotive master controllers
6. Passenger information and messaging system
7. Locomotive exterior painting services
8. Construction management services for the Crystal City Station improvements project
9. Construction management services for the Franconia-Springfield Station improvements project
10. Photography and videography services
11. Mechanical engineering consulting services

CAPITAL PROJECTS UPDATE

Project Name	Project Description	Current Phase	Budget	Project Notes
Alexandria Station Improvements	Passenger safety will be improved by replacing an at-grade pedestrian track crossing with elevators to connect the two platforms. The elevators and the current and proposed stairs, will connect to the existing tunnel between the two platforms. Adjustments to platform elevation will eliminate the need for step-boxes to access VRE and Amtrak trains. The center platform will be widened and lengthened to accommodate trains on both tracks.	Final Design	\$ 37,288,433.00	Conformed, consolidated 90% plans due to VRE in mid-October for distribution to VPRA, CSXT and Amtrak for stakeholder review. (October) Draft consolidated 90% plans reflecting both the station and bridge work submitted and under review by VRE. Stake-holder set to be distributed in October. (September)
Backlick Road Station Improvements	A 290-foot platform extension will accommodate eight-car trains thereby eliminating passenger movement within railcars and decreasing boarding and off-boarding time. Rehabilitation and repair of the existing platform and canopy, and upgrades of the lighting and communication systems are included.	Development	\$ 8,454,206.00	A request for CMAQ funding flexibility is currently being processed with VDOT, DRPT/VPRA, and FTA. (September/October)
Broad Run Expansion	To accommodate forecasted ridership growth and increase service reliability, improvements are needed at both the Maintenance and Storage Facility (MSF) and station. An enlarged MSF can store longer trains and additional equipment. That requires shifting the existing platform and adding a pedestrian tunnel between the platform and existing and proposed parking lots. A second, 600-space lot and third main track will be constructed.	Final Design	\$ 139,381,862.00	VRE comments on advanced 90% design package have been returned. Pre-application meetings are set with city and county ahead of forthcoming permit applications for site and buildings. Coordinating with US Army Corps of Engineers regarding jurisdictional wetlands. (October) Targeting a 90% design package deliverable to VRE for review in September. Permit applications to jurisdictional authorities will follow soon after. (September)
Crossroads MSF Employee Parking & AEW Building	Design and construction of a permanent employee parking lot and Administrative and Employee Welfare Building at VRE Crossroads Yard.	Final Design	\$ 7,365,765.00	Special use permit for eastern parcel approved by County Planning Commission. VRE will attend October Board of Supervisors meeting, the final step in permitting process. Site permit applications to be submitted thereafter. Task order for AEW building has been awarded. Kickoff meeting to be scheduled for mid-October. (October)
Crossroads MSF-TRV Phase II Service Expansion	Design and construction for long-term expansion of Crossroads MSF is needed to accommodate train consists, locomotives, and spare equipment required to provide the level of service contemplated in the Transforming Rail in Virginia Phase II service plan for Fredericksburg Line service. This includes an AEW building, warehouse expansion, additional storage tracks, electrical yard expansion, new pond, and pole barn building.	Development	\$ 55,061,790.00	Final deliverables substantially complete. VRE to schedule meeting to review steps to advance Phase II A (AEW) final design/construction. (October) Operations Board approval will be sought in September to execute a GEC task order for final design services. (September)

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CAPITAL PROJECTS UPDATE

Project Name	Project Description	Current Phase	Budget	Project Notes
Crystal City Station Improvements	Improved station access and service reliability will result from a new station. The platform at the relocated station will allow for the simultaneous boarding of two full-length trains. The station's design will accommodate a future pedestrian/bicycle connection between the station and the airport.	Development	\$ 68,900,900.00	Milestone deliverable package anticipated in November. (October) Station design advancing to 90% in fourth quarter of 2024. Significant coordination ongoing with adjacent project stakeholders to clarify design intent of Phase 2 (entrance from 2011 Crystal Drive). (September)
Franconia-Springfield Station Improvements	Extended platforms will be able to accommodate eight-car trains, eliminating the need for passengers near the rear to move to a different railcar when disembarking. Enhanced passenger safety and reduced station dwell times will result. The longer platforms will increase operational flexibility and capacity. The design will allow for a future third mainline track.	Final Design	\$ 25,351,100.00	Unified 90% Stakeholder Review Set distributed to VPRA and CSXT for review. Comments due by month's end. (October) Draft unified 90% package delivered to VRE for review. Comments returned to designer. Revised package for stakeholder review to be submitted later this month. (September)
Leeland Road Parking Improvements	This project will expand the surface parking lot at the Leeland Road station by approximately 225 spaces to accommodate future demand.	Development	\$ 12,044,433.00	Cost estimate update in progress (September/October)
Leeland Road Station Improvements	Design and construction of a platform extension to accommodate full-length VRE trains.	Development	\$ 10,361,037.00	Cost estimate update in progress (September/October)
L'Enfant Track and Station Improvements	Expansion of the VRE L'Enfant Station to provide two platform edges and serve full-length trains. Add a new mainline track between LE and VA interlockings.	Development	\$ 110,857,683.00	Coordination for utility relocation and signal design with the Long Bridge North and LEF projects is ongoing. (October) Second review meeting occurred in mid-September. Stakeholder 30% design reviews to begin in October. VRE and consultant currently organizing stakeholder matrix into categories based on levels of review. (September)

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CAPITAL PROJECTS UPDATE

Project Name	Project Description	Current Phase	Budget	Project Notes
Manassas Park Parking Expansion	A new garage will nearly double the 600 spaces currently available in the existing surface lot. A pedestrian bridge will provide grade-separated access to the existing platform and lot. The VRE station and garage are an integral part of the City Center Redevelopment District, the proposed transit-accessible high-density mixed-use town center of Manassas Park.	Construction	\$ 34,662,764.00	Site drainage around garage being installed and backfilled. Headhouse on top level of garage being installed. Platform side bridge pier constructed. Placement of new precast platform panels underway. Steel erection for stair/elevator tower to begin mid-month. (October) Installation of lighting and signs underway in garage. Plumbing for storm drainage being installed in garage. Lower section of platform-side bridge pier poured. (September)
Manassas Station Improvements	The project expands the VRE Manassas Station platform to serve full length trains and enhances pedestrian access to the station. Alternatives to increase the platform length to enable boarding and alighting from all passenger cars will be evaluated.	Development	\$ 9,125,000.00	A scope of work for a GEC environmental and engineering services is under review. (October) A task order to advance environmental study and engineering design is being drafted. (September)
New York Avenue Midday Storage Facility	This new facility will store trains currently located in Amtrak's Ivy City coach yard, as Amtrak now has need for the storage tracks. The New York Avenue site, which is proximate to Washington Union Station, will be able to accommodate additional VRE trains.	Development	\$ 137,362,557.00	Concept design drawings have been developed and shared with Amtrak for the crescent storage track in the Coach Yard and coordination has begun. (September/October)
Potomac Shores Station	This new station, in a master-planned community in Prince William County, is being funded, designed, and constructed by the developer of Potomac Shores in consultation with VRE and other stakeholders. The station will be just a short walk from the town center. A new side platform will be constructed which is designed to be converted into an island platform in the future when the 3rd track is added to corridor operations.	Final Design	\$ -	Construction of the shared garage is ongoing. Construction includes casting the three pedestrian bridge support concrete foundation piers that are adjacent to the garage building. (September/October)

- continued next page -

CAPITAL PROJECTS UPDATE

Project Name	Project Description	Current Phase	Budget	Project Notes
Quantico Station Improvements	Service and safety will be enhanced through the construction of a new center platform, ADA-compliant pedestrian bridges, existing platform extension, and third track. These improvements will allow the station to accommodate additional passengers and more frequent and longer trains and operations flexibility with three boardable platform edges.	Construction	\$ 25,573,060.00	Final inspections for elevator, electrical, mechanical, plumbing and building anticipated in October. Substantial completion contingent on final inspections. Ribbon cutting on November 1. (October) Final elevator inspections anticipated in October along with other final inspections. Project completion anticipated end of October/early November. (September)
Woodbridge Station Improvements	Expanded platforms will allow passengers to access trains from all station tracks.	Development	\$ 2,740,618.00	CMAQ funding flex requested from VPRA. Expect FTA grant approval in December. (October) FTA call in mid-September to discuss NEPA requirements. (September)

For more information about VRE capital projects, visit <https://projects.vre.org/list>



VIRGINIA RAILWAY EXPRESS

1500 KING STREET, SUITE 202 • ALEXANDRIA, VA 22314 • 703.684.1001

VRE.ORG





Virginia Railway Express

MINUTES Operations Board Meeting

9:00 AM - Friday, October 18, 2024
14700 Potomac Mills Road

The Operations Board Meeting of the Virginia Railway Express was called to order on Friday, October 18, 2024, at 9:04 AM, in the 14700 Potomac Mills Road, with the following members present:

PRESENT: Chair (Elected official) Meg Bohmke, Vice Chair (Elected official) Sarah Bagley, Secretary (Elected official) Ralph Smith, Treasurer (Elected official) Daniel Storck, At-Large (Elected official) Andrea Bailey, Immediate Past Chair (Elected official) James Walkinshaw¹, Board Member (Elected official) Margaret Franklin², Board Member (Elected official) Monica Gary, Board Member (Elected official) Lori Hayes, Board Member (Elected official) Jannan Holmes, Board Member (Elected official) Takis Karantonis, Board Member (Elected official) Alanna Mensing³, and Board Member (Appointed official) Michael McLaughlin⁴

VRE Staff: Rich Dalton, Steve Maclsaac, Mark Schofield, Joseph Swartz, Anaya Farah, Alexander Buchanan, Dallas Richards, Chris Henry, Karen Finucan Clarkson, Brandon Lindsey, Lezlie Lamb, Trinette Broussard, John Duque, Kevin Goldman, Natalia Portillo.

EXCUSED: Board Member (Elected Official) Tom Gordy, Board Member (Appointed official) Zach Trogdon, Alternate (Elected official) Canak Aguirre, Alternate (Elected official) Tinesha Allen, Alternate (Elected official) Victor Angry, Alternate (Elected official) Kenny Boddye, Alternate (Elected official) Will Mackintosh, Alternate (Elected official) Libby Garvey, Alternate (Elected official) Darryl Moore, Alternate (Elected official) Pamela Sebesky, and Alternate (Elected official) Pamela Yeung

1. Pledge of Allegiance

2. Roll Call

A. Approval of Remote Participants

1-2024

At-Large (Elected official) Andrea Bailey made a motion to approve the remote participation by electronic means of Operations Board Members Alanna Mensing and Margaret Franklin. Vice Chair (Elected official) Sarah Bagley seconded the motion. Carried unanimously.

¹ Arrived at 9:11 a.m.

² Participated remotely via Webex, joining late

³ Participated remotely via Webex

⁴ Arrived at 9:06 a.m.

3. Safety Moment

4. Approval of Agenda

- A. Approve the Agenda as presented

2-2024

At-Large (Elected official) Andrea Bailey made a motion to approve the agenda as presented. Secretary (Elected official) Ralph Smith seconded the motion. Carried unanimously.

5. Approval of Previous Minutes

- A. Approval of Minutes from the September 20, 2024 VRE Operations Board Meeting

3-2024

At-Large (Elected official) Andrea Bailey made a motion to approve the Minute from the September 20, 2024 meeting. Vice Chair (Elected official) Sarah Bagley seconded the motion. Carried unanimously.

6. Chair's Comments

- The Chair stated the Finance Committee would meet following the regular meeting.
- Chair Bohmke announced the date for the Quantico Station Improvements Project Ribbon Cutting was on November 1st and pointed out that on the back the Ribbon Cutting Invitation, members would find a schedule for special event trains to take them to the event.
- The Chair announced there will be an Audit Committee meeting before November's regular meeting.
- Also in November, the Nominating Committee will be tasked with developing a slate of nominees for 2024 Officers.
- Chair Bohmke pointed out that the December meeting is scheduled for December 20th, and asked Members to consider moving the meeting date up by one week.

7. Chief Executive Officer's Report

CEO Report

Mr. Dalton briefed the Operations Board on the following topics

- VRE Safety Plan
- Tour de VRE
- Clifton Day
- On-time performance
- Ridership
- Introduction of newest staff member: Brandon Lindsey

8. Virginia Railway Express Riders' and Public Comment

9. Consent Agenda

10. Action Items

- A. Authorization to Issue a Request for Proposals for Mechanical Engineering Consulting Services

4-2024

At-Large (Elected official) Andrea Bailey made a motion to authorize the CEO to issue a Request for Proposals for Mechanical Engineering Consulting Services. Board Member (Elected official) Takis Karantonis seconded the motion. Carried unanimously.

11. Information Items

- A. Spending Authority Report
- B. Draft 2025 Legislative Agenda
- C. Draft VRE Manassas Line Funding Agreement
- D. Budget Update

12. Closed Session

13. Operations Board Member's Time

Ms. Bagley thanked staff for their efforts in making Tour de VRE successful.

Mr. Storck stated that he regretted having to miss this year's Tour de VRE, but announced Tour de Mount Vernon which will take place Saturday, October 19th.

Mr. Karantonis expressed his regret for being unable to attend the Tour de VRE due to prior commitments.

Mr. McLaughlin commended VRE Chief Engineer and his staff for completing the Quantico Station Improvements Project, explaining the challenges that had been involved.

Ms. Holmes and Ms. Bailey both expressed excitement about the Quantico Station ribbon-cutting event. Ms. Bailey thanked VRE's Chief Financial Officer for ensuring Board Members and their staff receive critical budget information.

Ms. Bohmke expressed regret for missing the Tour de VRE. Also thanked VRE staff for including the train schedules in their communication about Quantico Day, and introduced Trinette Broussard as interim Board Clerk.

14. Adjournment

I certify the foregoing minutes were APPROVED by the VRE Operations Board at a meeting on November 15, 2024, at which a quorum was presented and voted.

Chief Executive Officer

Board Clerk

**Virginia Railway Express
Draft 2025 Legislative Agenda
Federal Funding, Legislative and Regulatory Issues:**

Rail Passenger Transportation Liability Cap

Collaborate with industry stakeholders in urging Congress to make changes to the timeline for implementation of increases to the Rail Passenger Transportation Liability Cap from 30 days to as much as 365 days, as well as any other changes to the liability cap adjustment process that would be advantageous to the VRE.

First Street Tunnel

Monitor activities related to the maintenance and upgrade of Amtrak's First Street Tunnel, which is the entrance to/exit from Washington Union Station for all passenger rail service south of Union Station. The First Street Tunnel remains a bottleneck and needs additional maintenance and upgrades to increase throughput capacity. Amtrak has initiated a First Street Tunnel Project study.

Federal Grant Programs

Work with the U.S. Department of Transportation (DOT), Virginia's congressional delegation, relevant congressional committees, and regional stakeholders to educate and secure administration and congressional support for discretionary grant applications submitted by VRE or the Virginia Passenger Rail Authority (VPRA), or others for projects directly impacting VRE service.

Infrastructure Investment and Jobs Act/Bipartisan Infrastructure Law Implementation and Yearly Appropriations

Continue to partner with industry stakeholders and associations to advocate for robust annual appropriations, funding levels at the authorized levels, and appropriate implementation policies to support commuter rail and mass transit. Engaging with the Virginia congressional delegation, providing comments on policy and regulatory position documents and collaborating on legislative advocacy will be necessary to ensure commuter rail interests are reflected in fiscal-year funding levels.

U.S. DOT Regulations and Rulemaking

Track and comment on proposed guidance, rulemakings, or requests for comment from U.S. DOT to advance permit streamlining reforms applicable to VRE's operations and Capital Improvement Program, as well as any proposed new or changes to existing rail-related regulations.

Surface Transportation Board (STB) Authority

Educate Congress and the administration on the imperative of preserving STB's jurisdiction over VRE and other common-carrier commuter railroads.

Monitor industry, congressional and administration efforts affecting the ability of VRE, and similar commuter railroads, to seek relief from the STB when negotiating with Amtrak. Submit comments, as necessary, to regulatory bodies to advocate for preserving STB jurisdiction over VRE.

Federal Workforce

Follow congressional and administration actions focused on the federal workforce's return to in-office work and permanent work-from-home policies.

**Virginia Railway Express
Draft 2025 Legislative Agenda
State Funding and Legislative Issues:**

Commuter Rail Exemption for Virginia State Tax on Surplus Lines Insurance

Continue efforts to advance legislation introduced in the 2024 General Assembly session that would exempt insurance policies for rolling stock and operating properties of railroads used for commuter rail service in the commonwealth from state tax on surplus lines insurance.

Future Additional Service Funding

Educate legislators on VRE's plans for additional service as part of the Commonwealth's Transforming Rail in Virginia program and VRE's 2050 System Plan to advance the Commonwealth's efforts to identify additional sustainable funding for VRE operations.

Monitor meetings of the SJ28 Subcommittee and Technical Working Group, and the DMVMoves Task Force and its advisory groups, analyzing any recommendations or legislation that results from their efforts.

Commuter Rail Operating and Capital Fund (CROC)

Monitor all proposed transportation funding legislation to ensure there are no adverse changes to CROC revenue sources.

Explore ways to diversify CROC revenue sources to include sustainable options that will reduce reliance on the gas tax.

Freedom of Information Act

Coordinate with VRE's parent commissions and other stakeholders on legislative proposals that would maximize the flexibility of VRE and other public bodies to make policies on the conduct of electronic meetings that allow greater access to the public and opportunities for members to participate, while remaining open and transparent to the public.



AGENDA ITEM #8 Department of Rail and Public Transportation (DRPT)

TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice
DATE: October 31, 2024
SUBJECT: Department of Rail and Public Transportation (DRPT)

At the November 2024 meeting, Acting DRPT Director Zach Trogdon will give his report. The [monthly DRPT Report](#), which provides updates on DRPT programs and initiatives, is attached.



COMMONWEALTH of VIRGINIA

Zach Trogdon
Acting Director

DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION
600 EAST MAIN STREET, SUITE 2102
RICHMOND, VA 23219-2416

(804) 786-4440
FAX (804) 225-3752
Virginia Relay Center
(800) 828-1120 (TDD)

TO: Chair de Ferranti and NVTC Commissioners

FROM: Zach Trogdon, Acting Director

DATE: October 31, 2024

SUBJECT: Virginia Department of Rail and Public Transportation (DRPT) Update

Commonwealth Transportation Board (CTB)

The CTB met on October 22 and 23 in Norfolk. At the action meeting, the CTB approved DRPT's recommendation and certified WMATA's compliance with Virginia Code and the CTB Policy for FY 2024.

At the workshop, WMATA Principal Director and Commonwealth appointee, Paul Smedberg, Principal Director and NVTC-appointee Matt Letourneau, and General Manager Randy Clarke presented the second annual WMATA update to the CTB, which focused on the near-term outlook for the operating and capital budget. An annual update to the CTB by the WMATA General Manager and the two principal board members from Virginia is now required as a result of legislation approved by the General Assembly in 2023.

FY 2026 DRPT Grant Applications

DRPT's FY 2026 application process for all our grant programs opens on December 1. Public transportation partners are strongly encouraged to attend DRPT's annual pre-application webinar on November 13 from 11 a.m. to 12:30 p.m. Advance registration is required. Application creation and submission starts on December 1, 2024, and the application period closes on February 1, 2025.

On October 1, the pre-application for Major Expansion Projects became available. Effective for Fiscal Year 2026, a pre-application is now mandatory for all MERIT - Capital Assistance - Major Expansion (MAJ) projects, including capital construction, vehicle expansion, and other project types. Pre-Applications are only required for FY 2026 Major Expansion project applications and are due December 1.

TDP/TSP Survey

At DRPT, we are committed to continually improving our processes to better serve our public transportation providers across the Commonwealth. To support this mission, we have created a survey for our Transit Development Plan (TDP) and Transit Strategic Plan (TSP) requirements to help us understand how we can improve our services to transit providers. We are asking for

anyone involved in the effort to take the survey and that they provide responses based on individual experiences rather than on behalf of their agency.

Transit Service Delivery Advisory Committee

The Transit Service Delivery Advisory Committee (TSDAC) met on Tuesday, October 8, 2024. DRPT staff provided the TSDAC with a current review and outlook for both the MERIT State Transit Operating Assistance program and the MERIT State Transit Capital Assistance program. Meeting materials are available on the [TSDAC website](#).

Rail Update

On October 15, I joined the Virginia Passenger Rail Authority (VPRA), together with federal and state officials including U.S. Secretary of Transportation Pete Buttigieg, U.S. Senators Tim Kaine and Mark Warner and U.S. Representatives Gerry Connelly and Abigail Spanberger, in a groundbreaking ceremony for the state's Long Bridge Project. The largest of the Commonwealth's Transforming Rail in Virginia (TRV) projects, Long Bridge is a \$2.3 billion infrastructure improvement which will provide increased capacity for passenger rail over the Potomac River.



TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice
DATE: October 31, 2024
SUBJECT: Executive Director Report

At the November 2024 meeting, the executive director will give her report.

A. Executive Director Newsletter

NVTC’s Executive Director Newsletter provides updates on specific NVTC projects and programs and highlights items of interest at the federal and state levels and among jurisdictional and regional partners.

The November 2024 Executive Director Newsletter will be provided to Commissioners at the Commission meeting and posted online at <https://novatransit.org/news-and-media/newsletter/>.

B. NVTC Financial Reports

The [September 2024 Financial Reports](#) are provided as information.



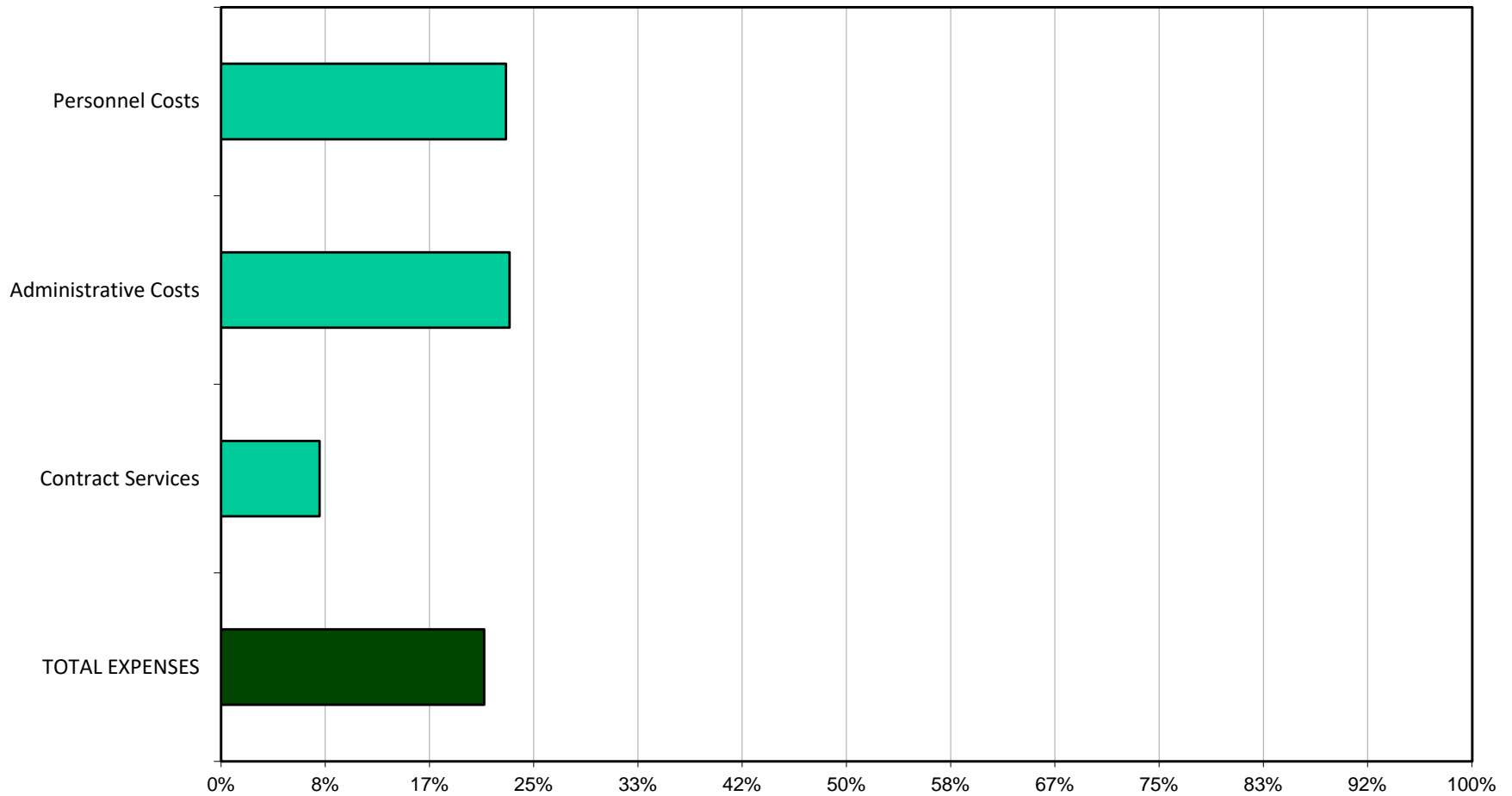
Northern Virginia Transportation Commission

Financial Reports
September 2024

PERCENTAGE OF FY 2025 NVTC ADMINISTRATIVE BUDGET USED

September 2024

(TARGET 25% OR LESS)



Note: Refer to pages 2 and 3 for details

**NORTHERN VIRGINIA TRANSPORTATION COMMISSION
G&A BUDGET VARIANCE REPORT
September 2024**

	Current Month	Year To Date	Annual Budget	Balance Available	Balance %
<u>Personnel Costs</u>					
Salaries and Wages	\$ 214,918.08	\$ 663,882.75	\$ 2,835,000.00	\$ 2,171,117.25	76.6%
Temporary Employee Services	-	-	-	-	
Total Personnel Costs	214,918.08	663,882.75	2,835,000.00	2,171,117.25	76.6%
<u>Benefits</u>					
Employer's Contributions:					
FICA	14,062.25	51,628.69	199,600.00	147,971.31	74.1%
Group Health Insurance	15,915.72	46,937.87	242,800.00	195,862.13	80.7%
Retirement	14,320.00	42,960.00	250,000.00	207,040.00	82.8%
Workmans & Unemployment Compensation	116.00	352.48	6,300.00	5,947.52	94.4%
Life Insurance	224.59	435.87	6,600.00	6,164.13	93.4%
Long Term Disability Insurance	1,509.41	4,315.29	17,600.00	13,284.71	75.5%
Total Benefit Costs	46,147.97	146,630.20	722,900.00	576,269.80	79.7%
<u>Administrative Costs</u>					
Commissioners Per Diem	1,650.00	2,750.00	14,000.00	11,250.00	80.4%
<i>Rents:</i>					
Office Rent	37,606.96	111,676.75	446,800.00	335,123.25	75.0%
Office Rent	35,762.56	106,845.10	422,600.00	315,754.90	74.7%
Parking & Transit Benefits	1,844.40	4,831.65	24,200.00	19,368.35	80.0%
<i>Insurance:</i>					
Public Official Bonds	400.00	1,300.00	8,500.00	7,200.00	84.7%
Public Official Bonds	-	100.00	2,500.00	2,400.00	96.0%
Liability and Property	400.00	1,200.00	6,000.00	4,800.00	80.0%
<i>Travel:</i>					
Conference / Professional Development	4,715.87	16,666.51	60,600.00	43,933.49	72.5%
Conference / Professional Development	3,874.78	15,264.31	42,100.00	26,835.69	63.7%
Non-Local Travel	130.78	130.78	2,500.00	2,369.22	94.8%
Local Travel, Meetings and Related Expenses	710.31	1,271.42	16,000.00	14,728.58	92.1%

**NORTHERN VIRGINIA TRANSPORTATION COMMISSION
G&A BUDGET VARIANCE REPORT
September 2024**

	Current Month	Year To Date	Annual Budget	Balance Available	Balance %
<i>Communication:</i>	2,276.71	4,192.35	19,400.00	15,207.65	78.4%
Postage	-	151.17	1,400.00	1,248.83	89.2%
Telephone and Data	2,276.71	4,041.18	18,000.00	13,958.82	77.5%
<i>Publications & Supplies</i>	1,468.73	4,997.89	37,000.00	32,002.11	86.5%
Office Supplies	-	889.30	2,500.00	1,610.70	64.4%
Duplication and Paper	651.35	1,787.26	9,500.00	7,712.74	81.2%
Public Engagement	817.38	2,321.33	25,000.00	22,678.67	90.7%
<i>Operations:</i>	2,869.43	9,342.26	56,800.00	47,457.74	83.6%
Furniture and Equipment (Capital)	-	-	19,800.00	19,800.00	100.0%
Repairs and Maintenance	54.64	163.92	1,000.00	836.08	83.6%
Computer Operations	2,814.79	9,178.34	36,000.00	26,821.66	74.5%
<i>Other General and Administrative:</i>	701.63	2,469.13	11,900.00	9,430.87	79.3%
Memberships	85.67	532.01	1,600.00	1,067.99	66.7%
Fees and Miscellaneous	615.96	1,937.12	8,800.00	6,862.88	78.0%
Advertising (Personnel/Procurement)	-	-	1,500.00	1,500.00	100.0%
Total Administrative Costs	<u>51,689.33</u>	<u>153,394.89</u>	<u>655,000.00</u>	<u>501,605.11</u>	<u>76.6%</u>
<u>Contracting Services</u>					
Auditing	-	-	26,400.00	26,400.00	100.0%
Contract Services and Support					
Commuter Choice	8,297.78	13,393.69	146,750.00	133,356.31	90.9%
Research Support	4,259.94	4,259.94	250,000.00	245,740.06	98.3%
Other Technical	7,916.67	20,000.01	120,000.00	99,999.99	83.3%
Legal	<u>2,500.00</u>	<u>7,500.00</u>	<u>30,000.00</u>	<u>22,500.00</u>	<u>75.0%</u>
Total Contract Services	22,974.39	45,153.64	573,150.00	527,996.36	92.1%
 Total Gross G&A Expenses	<u><u>\$ 335,729.77</u></u>	<u><u>\$ 1,009,061.48</u></u>	<u><u>\$ 4,786,050.00</u></u>	<u><u>\$ 3,776,988.52</u></u>	<u><u>78.9%</u></u>

NVTC
 RECEIPTS and DISBURSEMENTS
 September 2024

Date	Payer / Payee	Purpose	Virginia LGIP				
			Wells Fargo Checking	Wells Fargo Savings	NVTC G&A / Project	Commuter Choice	Trusts
RECEIPTS							
4	DMV	Motor Vehicle Fuels Sales tax				\$ 2,707,313.11	
4	DMV	CROC			1,250,000.00		
23	DRPT	Capital grant receipt - Alexandria				2,359,462.00	
25	DRPT	Capital and operating assistance - WMATA				18,333,611.00	
30	Banks	Investment earnings		356.61	13,065.20	487,886.14	1,745,865.97
TOTAL RECEIPTS			-	356.61	1,263,065.20	487,886.14	25,146,252.08

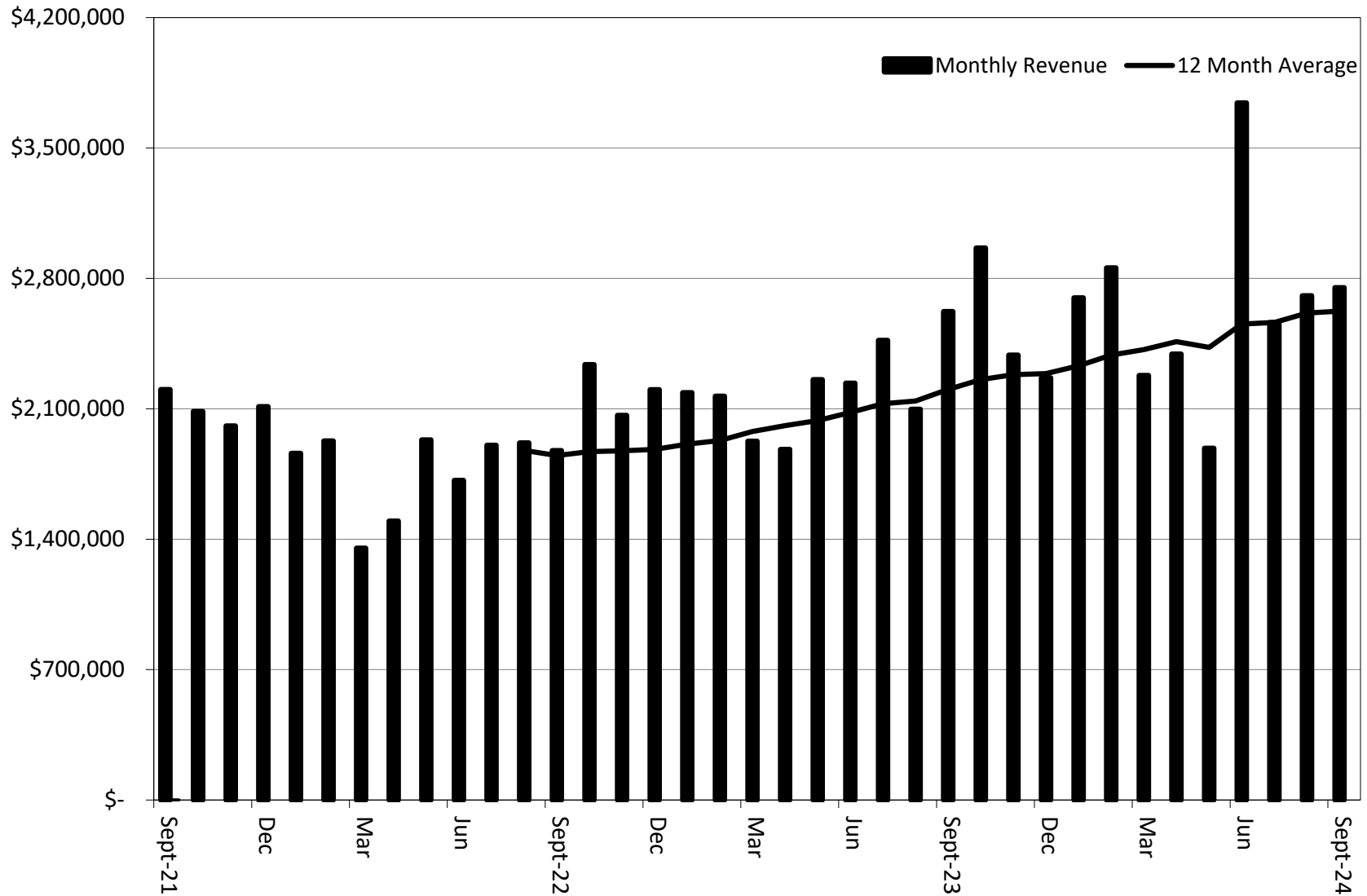
NVTC
 RECEIPTS and DISBURSEMENTS
 September 2024

Date	Payer / Payee	Purpose	Virginia LGIP				
			Wells Fargo Checking	Wells Fargo Savings	NVTC G&A / Project	Commuter Choice	Trusts
DISBURSEMENTS							
1-30	Various	G&A expenses	(291,515.15)				
4	VRE	CROC			(1,250,000.00)		
5	Prince William	Commuter Choice reimbursement				(64,924.00)	
12	Cambridge	Consulting - Regional bus project	(4,276.52)				
26	Kimley-Horn	Consulting - Commuter Choice	(8,297.78)				
26	Stantec	Consulting - NTD project	(29,404.00)				
30	Banks	Service charges	(20.05)	(98.13)			
TOTAL DISBURSEMENTS			<u>(333,513.50)</u>	<u>(98.13)</u>	<u>(1,250,000.00)</u>	<u>(64,924.00)</u>	<u>-</u>
TRANSFERS							
9	Transfer	LGIP to checking	260,000.00		(260,000.00)		
26	Transfer	LGIP to checking	125,000.00		(125,000.00)		
27	Transfer	LGIP to LGIP (NTD project)			29,404.00		(29,404.00)
NET TRANSFERS			<u>385,000.00</u>	<u>-</u>	<u>(355,596.00)</u>	<u>-</u>	<u>(29,404.00)</u>
NET INCREASE (DECREASE) FOR MONTH			<u>\$ 51,486.50</u>	<u>\$ 258.48</u>	<u>\$ (342,530.80)</u>	<u>\$ 422,962.14</u>	<u>\$ 25,116,848.08</u>

**NVTC
INVESTMENT REPORT
September 2024**

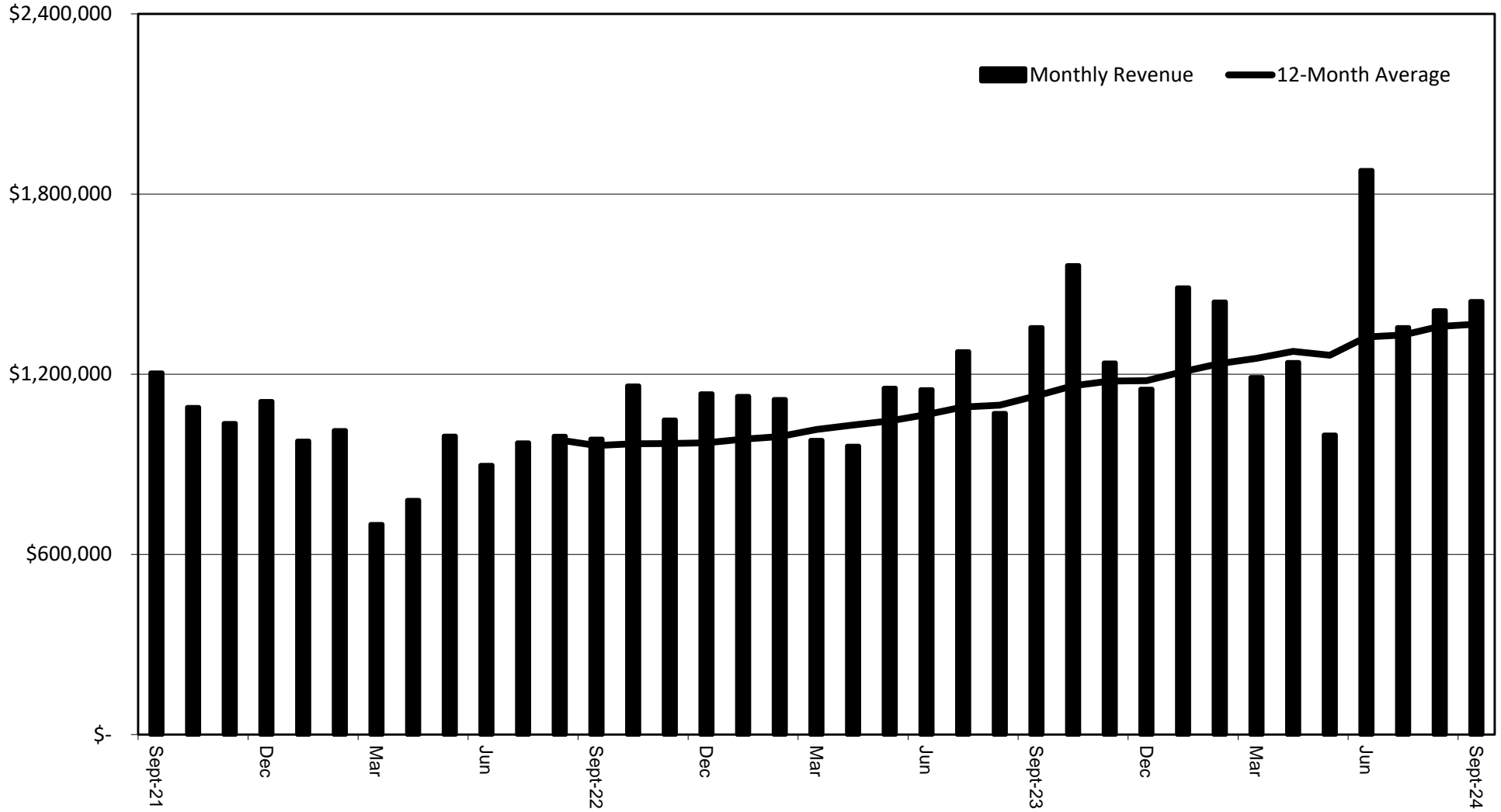
<u>Type</u>	<u>Rate</u>	<u>Balance 8/31/2024</u>	<u>Increase (Decrease)</u>	<u>Balance 9/30/2024</u>	<u>Balance</u>			
					<u>NVTC G&A/Project</u>	<u>Commuter Choice</u>	<u>Jurisdictions Trust Fund</u>	<u>Loudoun Gas Tax Trust Fund</u>
<u>Cash Deposits</u>								
Wells Fargo: NVTC Checking	N/A	\$ 44,176.02	\$ 51,486.50	\$ 95,662.52	\$ 95,662.52	\$ -	\$ -	\$ -
Wells Fargo: NVTC Savings	1.000%	434,947.99	258.48	435,206.47	435,206.47	-	-	-
<u>Investments</u>								
Bank of America: Virginia Local Government Investment Pool	5.403%	512,048,656.49	25,197,279.42	537,245,935.91	2,864,655.14	113,041,778.59	370,729,062.69	50,610,439.49
		<u>\$ 512,527,780.50</u>	<u>\$ 25,249,024.40</u>	<u>\$ 537,776,804.90</u>	<u>\$ 3,395,524.13</u>	<u>\$ 113,041,778.59</u>	<u>\$ 370,729,062.69</u>	<u>\$ 50,610,439.49</u>

NVTC MONTHLY GAS TAX REVENUE ALL JURISDICTIONS FISCAL YEARS 2022-2025



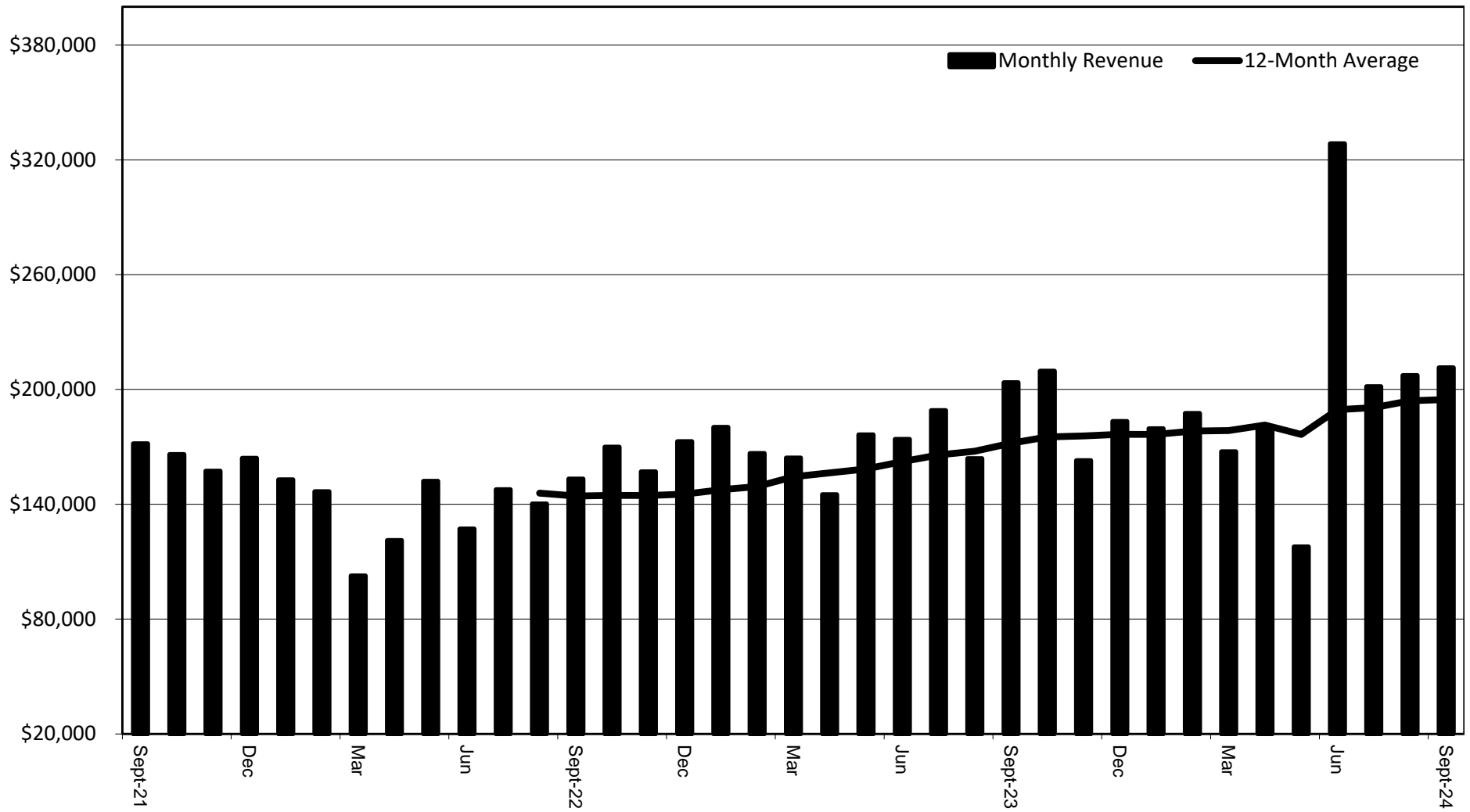
Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier.

NVTC MONTHLY GAS TAX REVENUE FAIRFAX COUNTY FISCAL YEARS 2022-2025



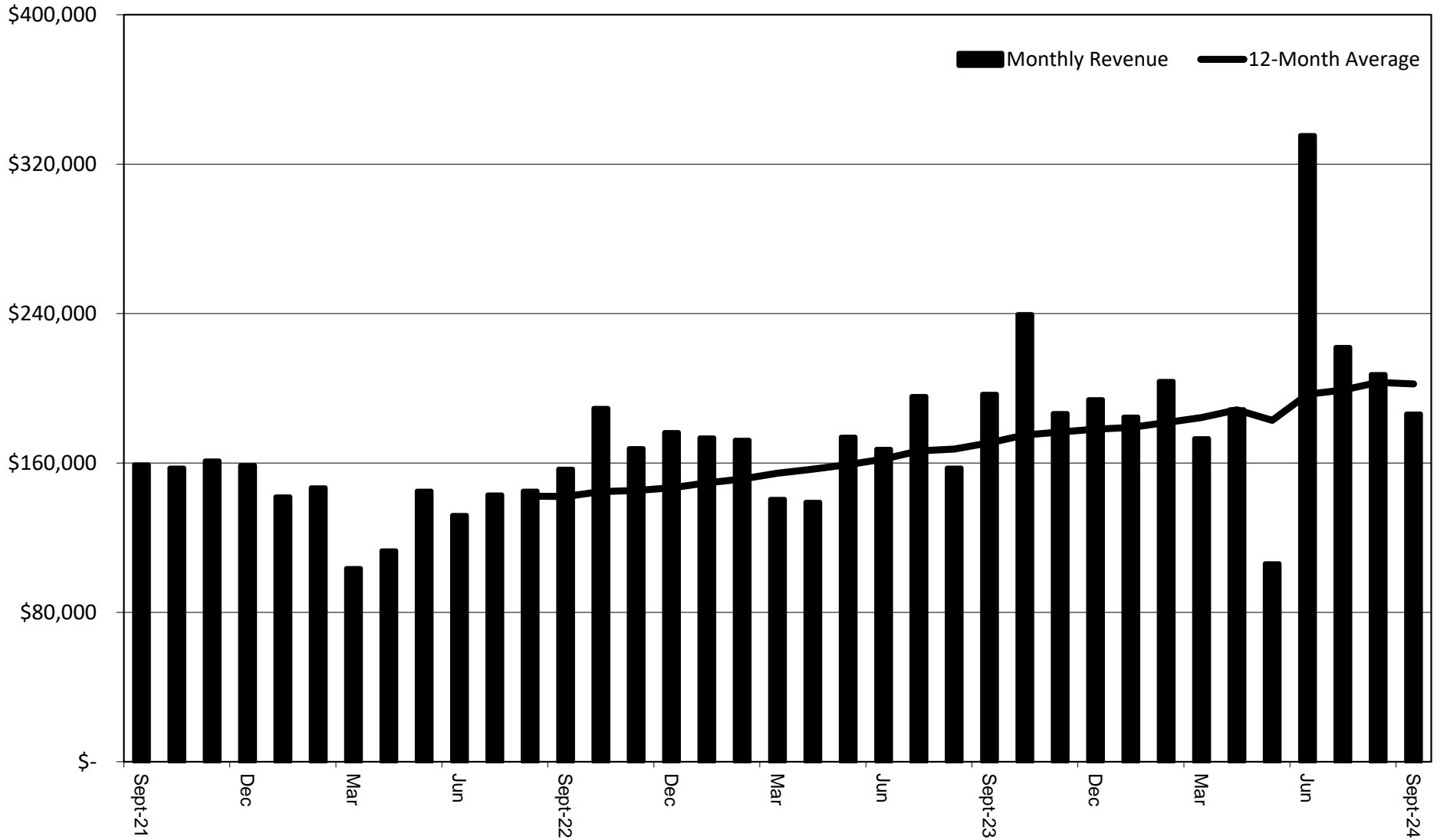
Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier.

NVTC MONTHLY GAS TAX REVENUE CITY OF ALEXANDRIA FISCAL YEARS 2022-2025



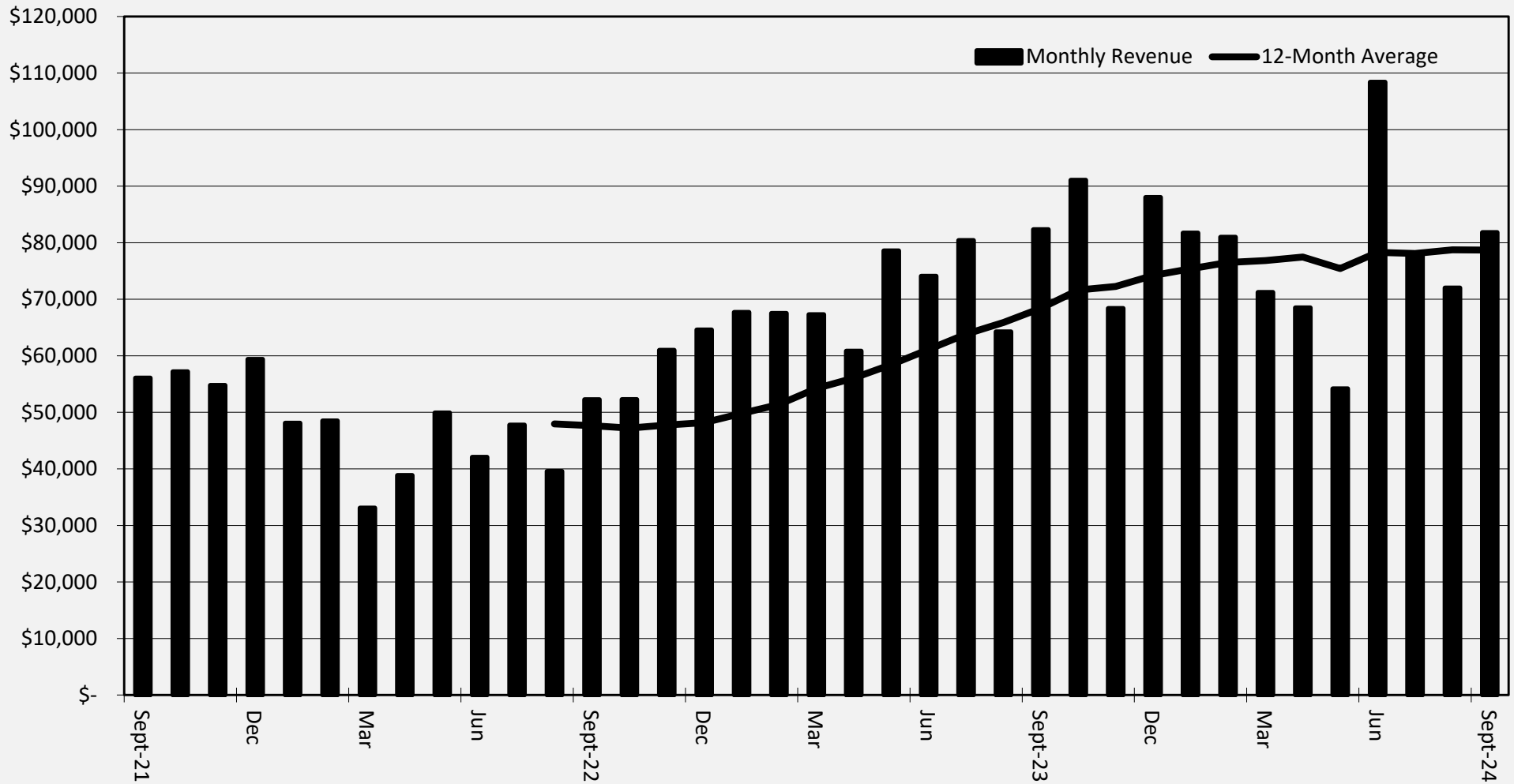
Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier.

NVTC MONTHLY GAS TAX REVENUE ARLINGTON COUNTY FISCAL YEARS 2022-2025



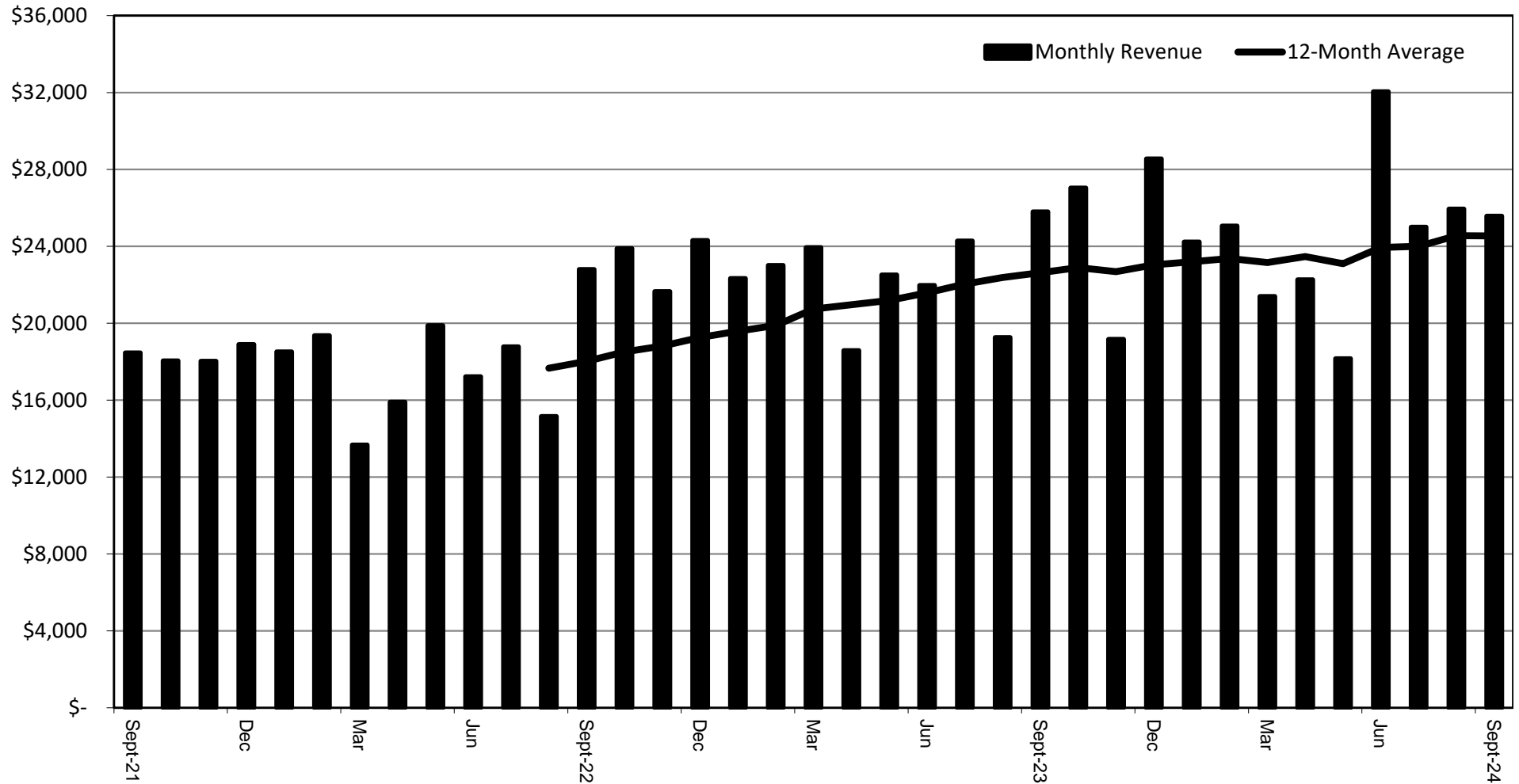
Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier.

NVTC MONTHLY GAS TAX REVENUE CITY OF FAIRFAX FISCAL YEARS 2022-2025



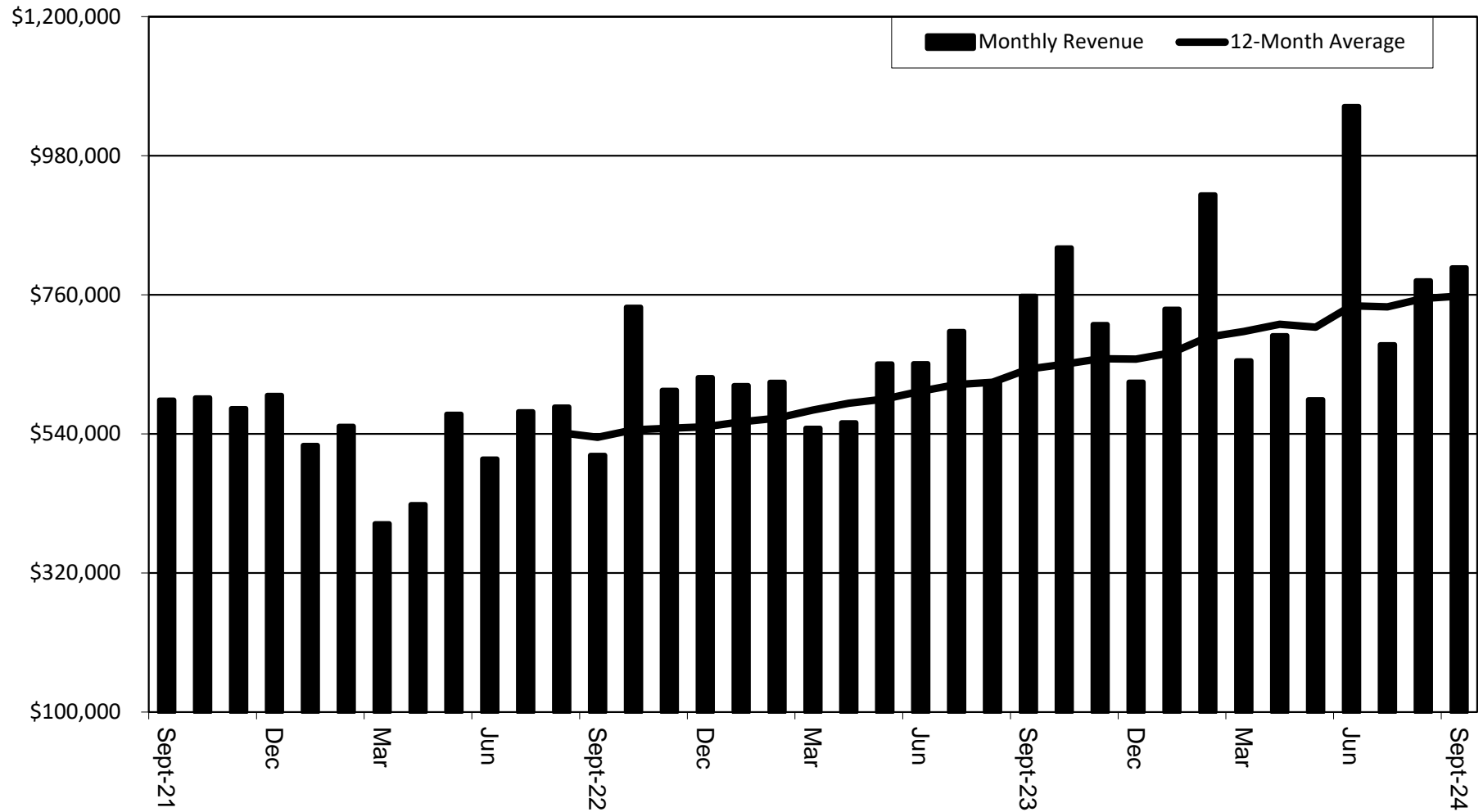
Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier.

NVTC MONTHLY GAS TAX REVENUE CITY OF FALLS CHURCH FISCAL YEARS 2022-2025



Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier .

NVTC MONTHLY GAS TAX REVENUE LOUDOUN COUNTY FISCAL YEARS 2022-2025



Note: Taxes shown as received by NVTC in a particular month are generated from sales two months earlier.



TO: Chair de Ferranti and NVTC Commissioners
FROM: Kate Mattice
DATE: October 31, 2024
SUBJECT: Closed Session

At the November meeting, the Commission will convene a Closed Session to discuss the executive director's annual performance review.

Motion to Enter into Closed Session:

Pursuant to the Virginia Freedom of Information Act, Section 2.2-3711.A.1 of the Code of Virginia, I move that the Northern Virginia Transportation Commission convene a closed meeting for discussion of a personnel matter concerning the performance of the executive director.

Motion for Certification Coming out of Closed Session:

The Northern Virginia Transportation Commission certifies that, to the best of each member's knowledge and with no individual member dissenting, at the just concluded Closed Session:

1. Only public business matters lawfully exempted from open meeting requirements under the Freedom of Information Act were discussed; and
2. Only such public business matters as were identified in the motion by which the Closed Session was convened were heard, discussed or considered.