NORTHERN VIRGINIA TRANSPORTATION COMMISSION

2024

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

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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
- Parking
- Hospital
- Airport

Connecting Rail Systems
AMTRAK · VRE · MARC

Transfer Station
Station in Service

Metro is accessible.

N
Map is not to scale

No Smoking
No Eating or Drinking
No Animals (except service animals)
No Audio (without earphones)
No Littering or Spitting
No Dangerous or Flammable Items

December 15, 2024

On behalf of the Northern Virginia Transportation Commission (NVTC), I am pleased to submit the *2024 Report on the Performance and Condition of the Washington Metropolitan Area Transit Authority* (WMATA) as directed by Virginia Code.

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. To help WMATA avoid drastic service cuts and maintain its ridership recovery, Northern Virginia jurisdictions, in partnership with the Commonwealth of Virginia, crafted a two-year funding solution for WMATA's operating budget in FY 2025 and FY 2026. Through this joint partnership, the NVTC jurisdictions and the Commonwealth matched and committed additional subsidy and pressed WMATA to aggressively manage its costs, find operating and capital savings, and improve efficiency.

With FY 2027 looming on the horizon, several key initiatives are underway in an effort to develop long-term, sustainable, dedicated funding solutions for WMATA and Northern Virginia's other public transit agencies who face similar conditions. WMATA, in partnership with the Metropolitan Washington Council of Governments (MWCOG), commenced the DMV*Moves* effort to identify long-term funding needs and possible funding mechanisms. Virginia's General Assembly established a Joint Subcommittee through SJ 28 to study Virginia's share of those future needs and ways to meet them with new, potential revenues and cost containment measures.

As NVTC supports this vital work, this report contains recommendations directed to WMATA and other stakeholders intended to offer a framework for the continued regional funding and reform discussions that will take place over the next year. The report also outlines expenditures of the Commonwealth's WMATA Capital Fund and safety, reliability, financial performance and ridership data as required by state code. We look forward to continuing to work with our partners in the Commonwealth to ensure a stable and accountable financial future for Metro.

Sincerely,

Matt de Ferranti
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. WMATA faces unprecedented deficits in its operating and capital budgets should a long-term funding solution not be realized.

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, targeted 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 has agreed to provide 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 a 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 (MWCOG), commenced the DMV*Moves* 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: 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 and cost savings measures to meet the growing needs of WMATA and other public transit operators in Northern Virginia.*

Recommendation	Directed to	
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	DMV*Moves* 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 Board and funding jurisdictions	
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 coordinate transit technology and associated policies across the region to benefit riders and find cost savings.	WMATA, VRE and transit agencies	DMV*Moves*
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	DMV*Moves*

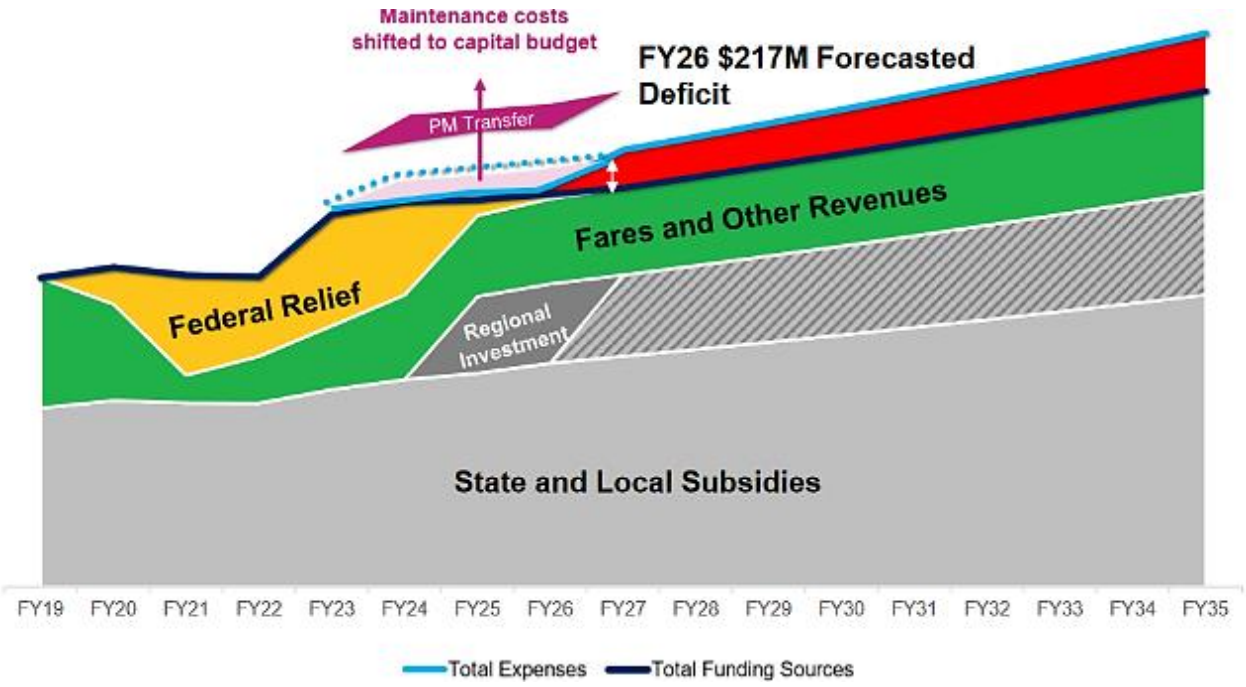
Recommendation	Directed to	
9. Manage labor cost escalation through reforms to pension and other post-employment benefits (OPEB). • Increase worker contributions to pensions and OPEB to reflect national averages. • Limit or prohibit overtime earnings towards retirement pay. • Implement OIG findings to 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	

Several recommendations are already advancing via the DMV*Moves* and SJ 28 initiatives.

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 exhaustion 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.

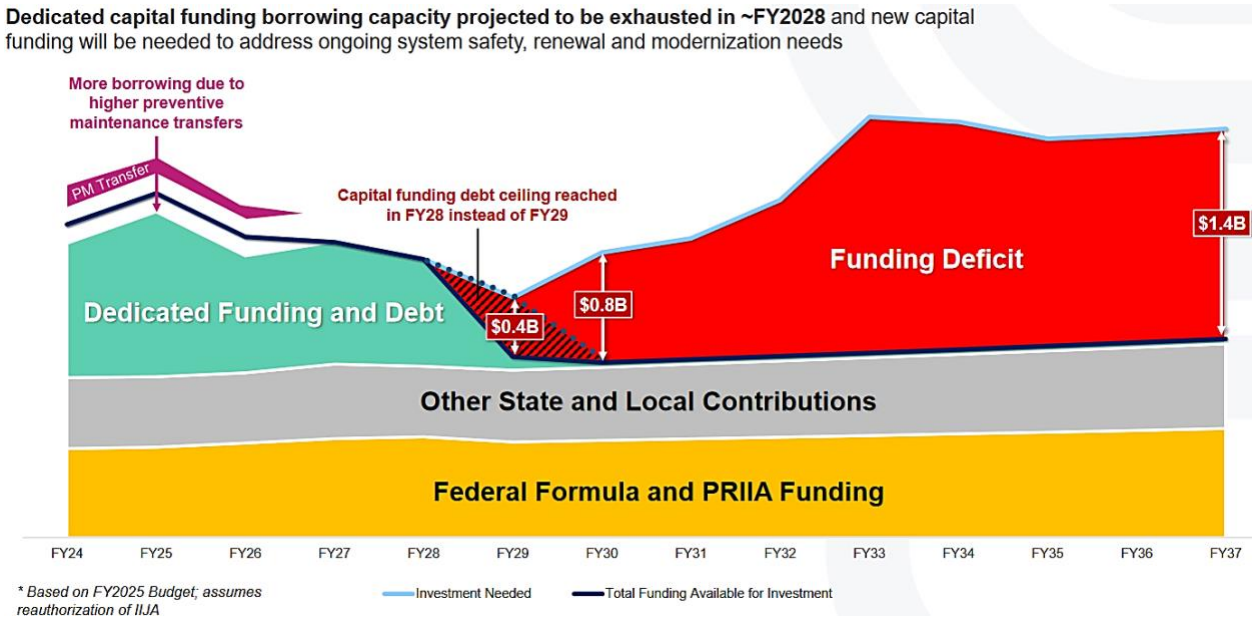


Source: WMATA, as of October 2024[1]

Figure 1: WMATA Structural Operating Deficit

Beyond WMATA's operating funding needs, a capital funding cliff looms on the horizon with dedicated capital funding bond capacity projected to be exhausted in FY 2028 (Figure 2). WMATA has made significant progress in addressing overdue state of good repair needs, reducing 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 the district 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.



Source: WMATA, as of October 2024[2]

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 the district and Maryland.

Virginia's biennium 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 the 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.

A Post-Pandemic 3% Cap

Through the "2023 Metro Operating and Reform Working Group Report," NVTC and its jurisdictions found that the 3% 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.

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 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.

4. Sustain rail and bus service levels to continue an ongoing ridership recovery.
Recommendation directed to the WMATA Board and funding jurisdictions.

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 systems. 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 that serve areas of Northern Virginia. As FY 2025 ridership and revenue trends upwards, 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 2025 Better Bus Network is scheduled to be implemented by summer 2025.[8] This 2025 Network, which uses existing (FY 2025) resource levels, 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 an (albeit temporarily suspended) 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 associated management policies that set parameters 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 employes to ride transit to work. These transit benefits are used across the major transit providers in the region: WMATA, the Maryland Area Rail Commuter (MARC), Virginia Railway Express (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. It is important for the federal government to maintain its competitiveness and allow for some hybrid work, but to make transit the mode of choice as federal workers continue returning to the office.

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 Greater Washington region identify new potential revenue streams to support public transit, it is important to identify opportunities for streamlining and cost savings. The DMV*Moves* 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.
    - WMATA announced in September 2024 a goal to implement an open payment system by World Pride 2025.[9]
- Coordinating among regional partners to enhance real-time bus information, including integration and technical support, across transit agencies.
- Ensuring that joint procurements for transit technologies do not monetarily penalize smaller agencies for purchasing fewer units.

While joint procurement already exists with WMATA and transit agencies in Northern Virginia, they should collaboratively 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.[10] 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 DMV*Moves*, 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 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.[11] 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 the station opens and after it closes). 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 remain opportunities to address longstanding issues with pension and other post-employment benefits as additional contracts are negotiated. 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.[12]

- **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.[13]

- **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.[14]

- **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.[15]

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.[16] Through the third quarter of FY 2024, overtime pay comprised 10% ($113.4 million) of personnel expenses and were 42% over budget.[17] 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 Compact calls for both parties to enter binding arbitration, where, if negotiations continue at an impasse, an arbitration panel will determine the outcome.[18] 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.[19] 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.

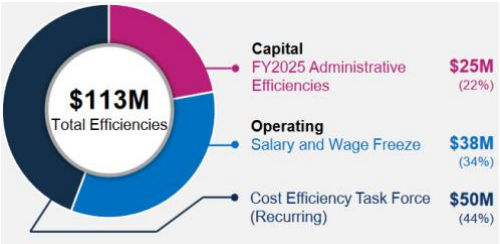
WMATA has made significant progress in demonstrating its commitment to reducing costs and finding savings in the areas it can control. A critical means to provide confidence to its funders, WMATA has communicated the ways in which it has sought cost savings both in its FY 2025 budget process and thereafter, including to the General Assembly's SJ 28 Joint Subcommittee.[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 without additional costs.[21]

WMATA has also shared strategies the agency is pursuing to continue to advance cost savings through technology, space efficiency (e.g. call center consolidation), procurement and operations such as

Cost Savings Strategies at WMATA

Recurring savings from management action



Source: WMATA

FY 2025 fare increases on rail and bus

Source: WMATA

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 revenue generating opportunities such as physical and data infrastructure enhancements. Land is WMATA's most valuable physical asset and while progress has 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 circulation[26] 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 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, the Metro Transit Policy

Mitigating Fare Evasion

New faregates at all Metrorail stations

Source: WMATA

New fareboxes to capture more revenue

Source: WMATA

Department (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% systemwide, which is nearly double the 34% systemwide fare evasion rate that occurred between July 1, 2021 and December 31, 2021.[30]

The MTPD, not bus operators or station managers, is responsible for enforcing fare payment, and the 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 has varied greatly over the last five years. In the district, fare evasion was a criminal offense until the Council of the District of Columbia 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 Redesign[35] 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 2025 Better Bus 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. After Board approval in November 2024, WMATA intends to begin implementation of the Year One Network in summer 2025.

Redesigning Metrobus

The Better Bus Initiative

Source: WMATA

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 major 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 formula created a broken system that is inconsistent and unpredictable to partners, provided distorted incentives around service provision, inhibited the use of external grant sources to pay for service, disincentivized jurisdictions from taking action on fare evasion and made targeted service changes and how they were paid for unnecessarily complex and fraught with veto points. The 3% operating subsidy cap 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.

After extensive engagement with the funding jurisdictions, the WMATA Board approved new subsidy allocation formulas for both Metrobus and Metrorail in November 2024. The new Metrobus subsidy allocation formula, which better links levels of service with the amount of subsidy provided and offers incentives for paid ridership, is a critical component of the Better Bus Network Redesign, another key initiative approved in November 2024.

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

WMATA and the 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]

The 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, 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]

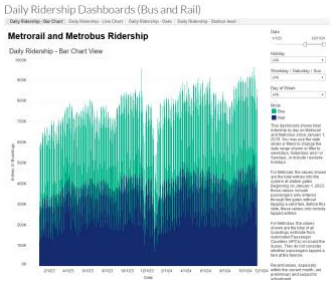
Through legislation, grant agreements, and Board direction, WMATA provides a great deal of reporting to federal, state, regional and local stakeholders. NVTC recommends that WMATA continue its ongoing efforts to improve transparency and reporting. NVTC suggests that WMATA continue publishing information 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]

Improving Transparency and Reporting

Quarterly Progress Reports

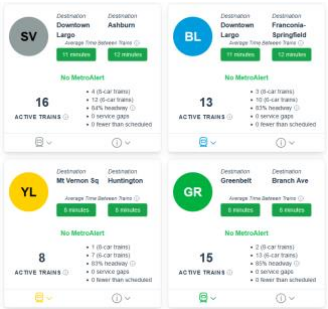
Source: WMATA

Daily Ridership Dashboard



Source: WMATA

MetroPulse



Source: WMATA

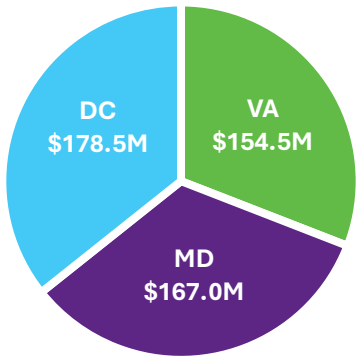
3. Use of Dedicated Capital Funds

In 2018, the Commonwealth of Virginia, the State of Maryland and the district 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 and 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



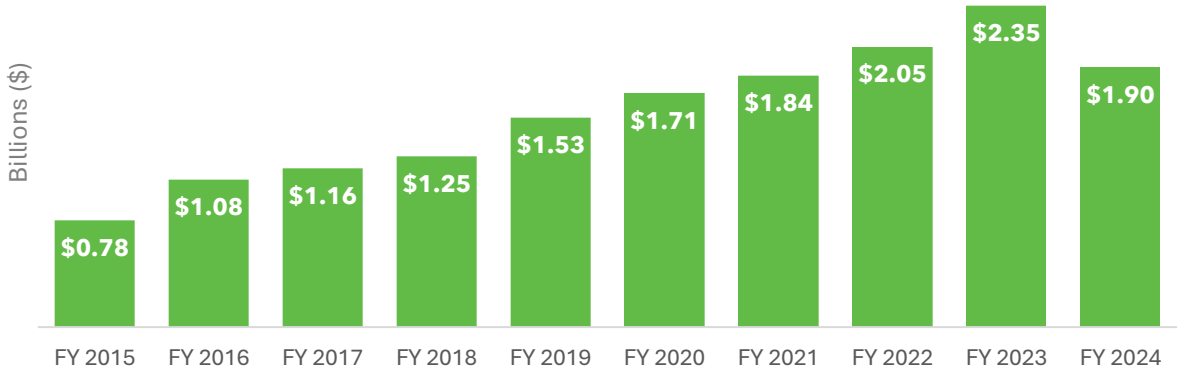
Sources of Revenue

The WMATA Capital Fund is administered 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]



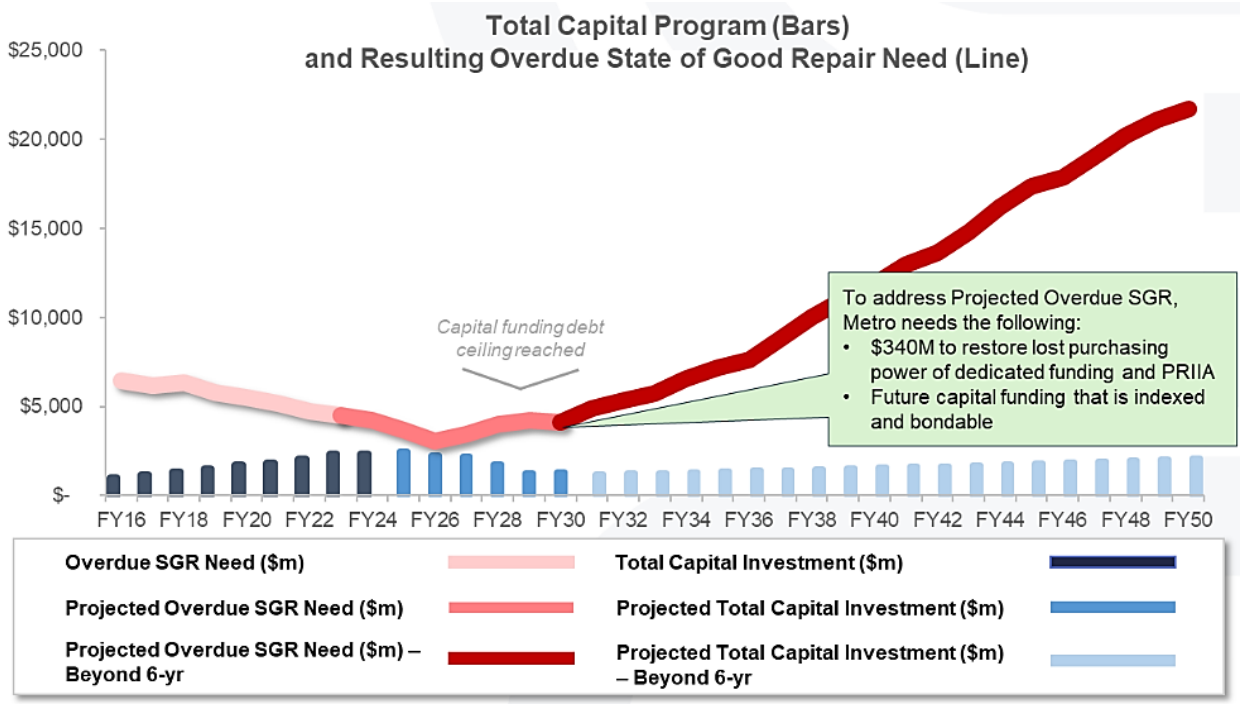
Source: WMATA Capital Improvement Program Progress Report Fiscal Year 2024 Quarter 4

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 about 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 about FY 2028, limited future capital funding has an impact on the agency's current capital budget. WMATA's current, proactive approach within its capital program 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 prioritizing corrective maintenance actions over preventive maintenance. After approximately 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 ensures state of good repair in which it supports the performance goal of 8,000 miles between failures for bus reliability.

Battery Electric Buses

WMATA received three battery-electric buses in FY 2024

Source: Northern Virginia Transportation Commission

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 and Table 4 summarize the total count of each type of Metrorail and Metrobus safety event and incidence per ten million revenue miles (VRM) for calendar years 2020 through 2023.

Table 3: Metrorail Safety

NTD Category	Safety Event	CY 2020	CY 2021	CY 2022	CY 2023	CY 2020 – CY 2023 Rate over Time
Events	Collision	10	9	7	11	1.50, 1.30, 1.31, 1.20
	Derailment	4	4	5	7	0.60, 0.58, 0.94, 0.76
	Security Event	49	70	72	96	7.37, 10.11, 13.52, 10.48
	Fire	39	43	39	37	5.86, 6.21, 7.33, 4.04
Fatalities	Fatality	6	6	3	8	0.90, 0.87, 0.56, 0.87
Injuries	Injury	188	205	229	261	28.27, 29.61, 43.01, 28.48

Rate per 10M VRM

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

Table 4: Metrobus Safety

NTD Category	Safety Event	CY 2020	CY 2021	CY 2022	CY 2023	CY 2020 – CY 2023 Rate over Time
Events	Collision	98	137	149	180	37.56, 40.52, 39.91, 47.34
	Derailment	N/A	N/A	N/A	N/A	
	Security Event	31	36	43	61	11.88, 10.65, 11.52, 16.04
	Fire	1	4	3	0	0.38, 1.18, 0.80, 0.00
Fatalities	Fatality	1	6	4	1	0.38, 1.77, 1.07, 0.26
Injuries	Injury	238	330	320	391	91.21, 97.60, 85.71, 102.83

Rate per 10M VRM

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.

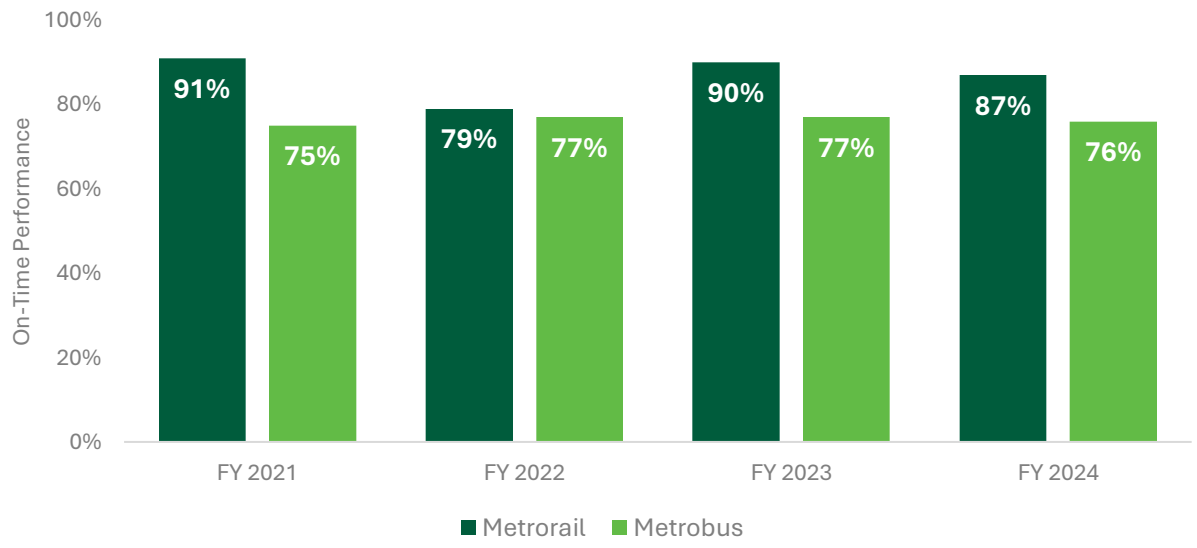
On-Time Performance

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, 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.



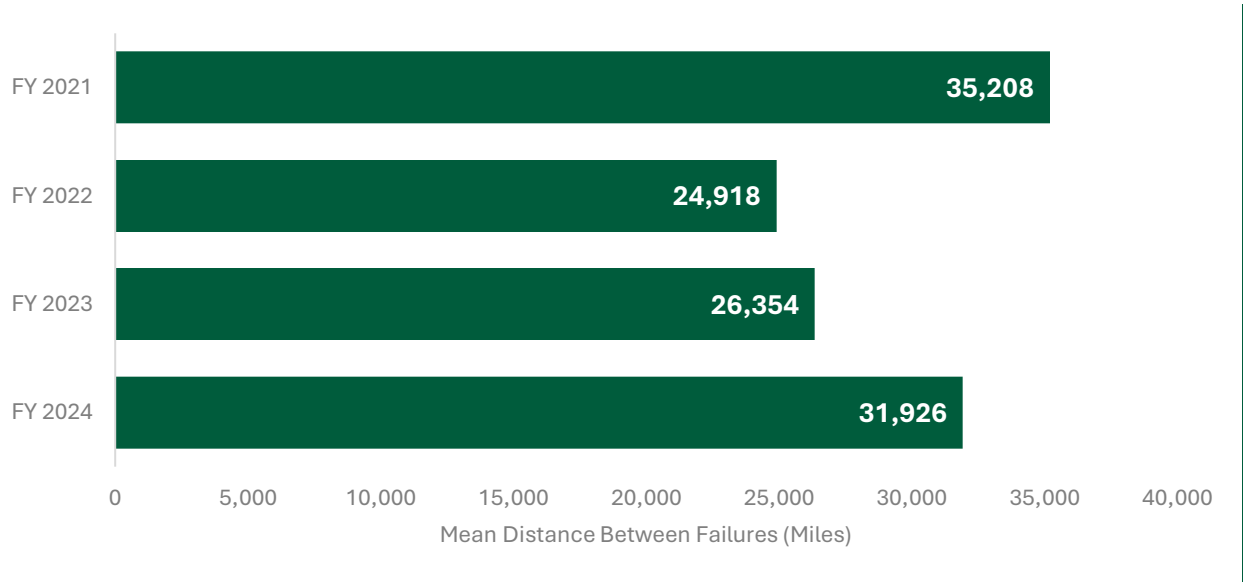
Source: WMATA FY 2024 Service Excellence Report

Figure 5: On-Time Performance by Mode

Mean Distance between Failures

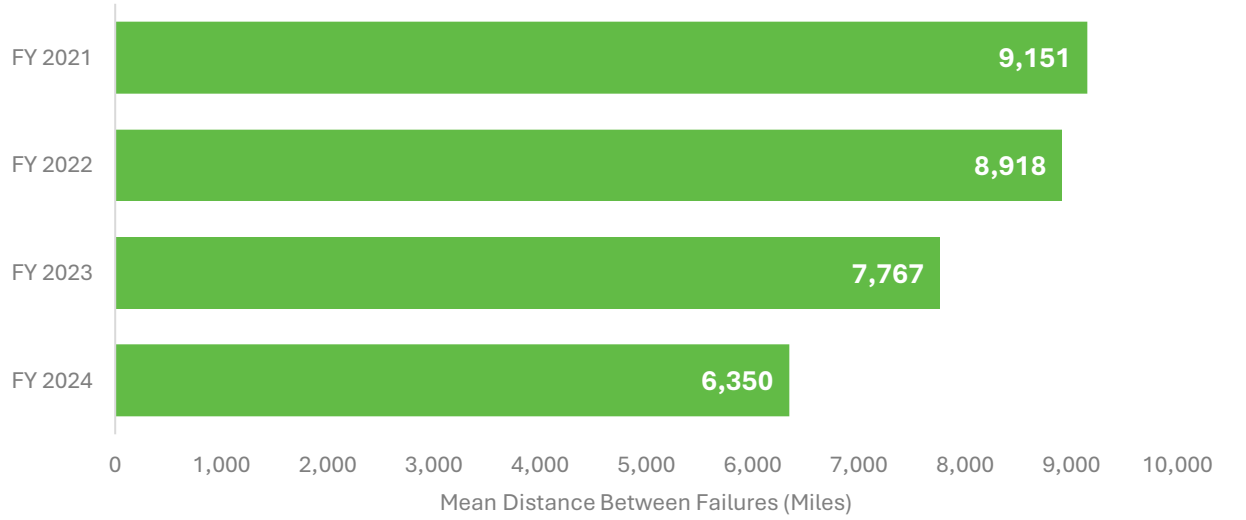
Mean distance between failure (MDBF) indicates the average number of miles traveled between vehicle failures. For rail, a car failure can occur without disrupting service or causing delay, instead resulting in discomfort or inconvenience. A bus failure is defined by a mechanical failure that interrupts 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:

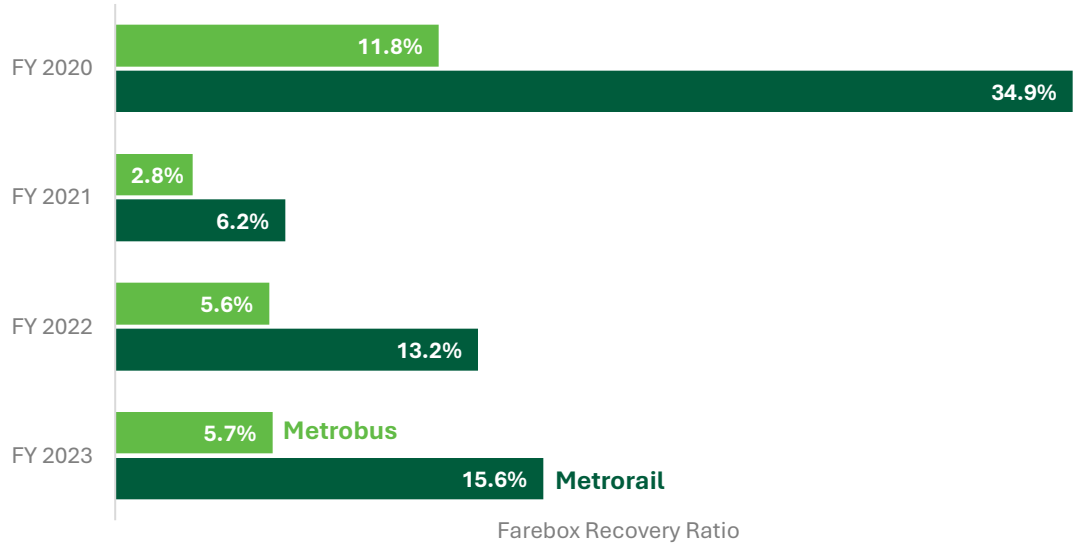
1. Metrorail Farebox Recovery and Metrobus Farebox Recovery.
2. Metrorail Service per Rider and Metrobus Service per Rider.
3. Cost per Metrorail Service Hour and Cost per Metrobus Service Hour.

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.



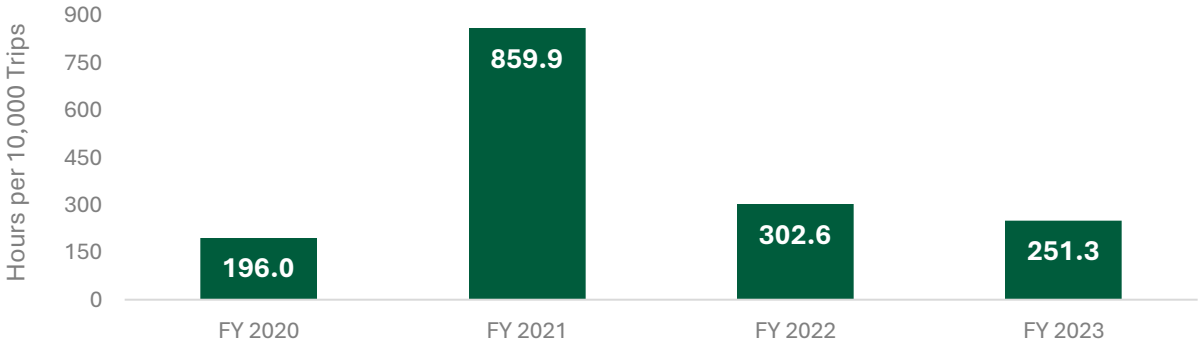
Source: National Transit Database FY 2023
Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

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.

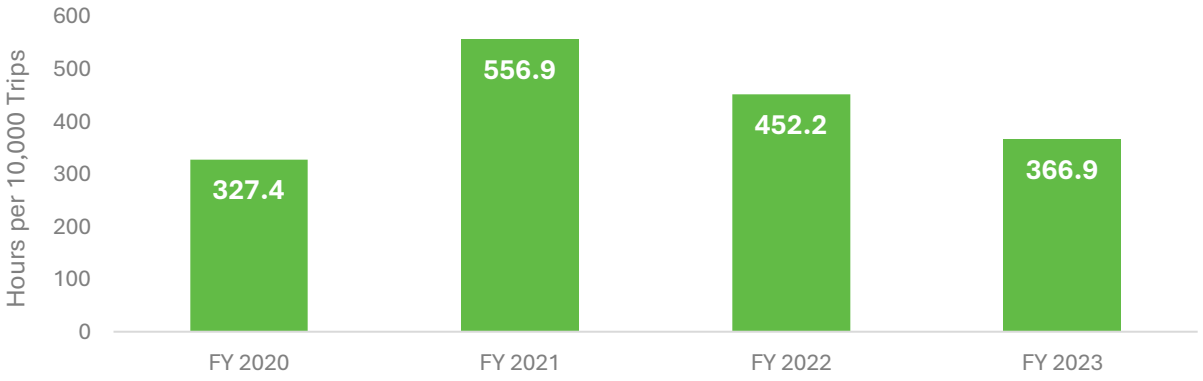


	FY 2020	FY 2021	FY 2022	FY 2023
Service* ÷	3,421,264	3,142,911	2,302,036	3,185,833
Ridership* x 10,000 =	174,540,714	36,550,201	76,077,714	126,773,716
Service per Rider	**196.0**	**859.9**	**302.6**	**251.3**

*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



	FY 2020	FY 2021	FY 2022	FY 2023
Service* ÷	3,182,178	2,914,017	3,595,310	3,774,118
Ridership* x 10,000 =	97,210,648	52,325,667	79,512,639	102,855,922
Service per Rider	**327.4**	**556.9**	**452.2**	**366.9**

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

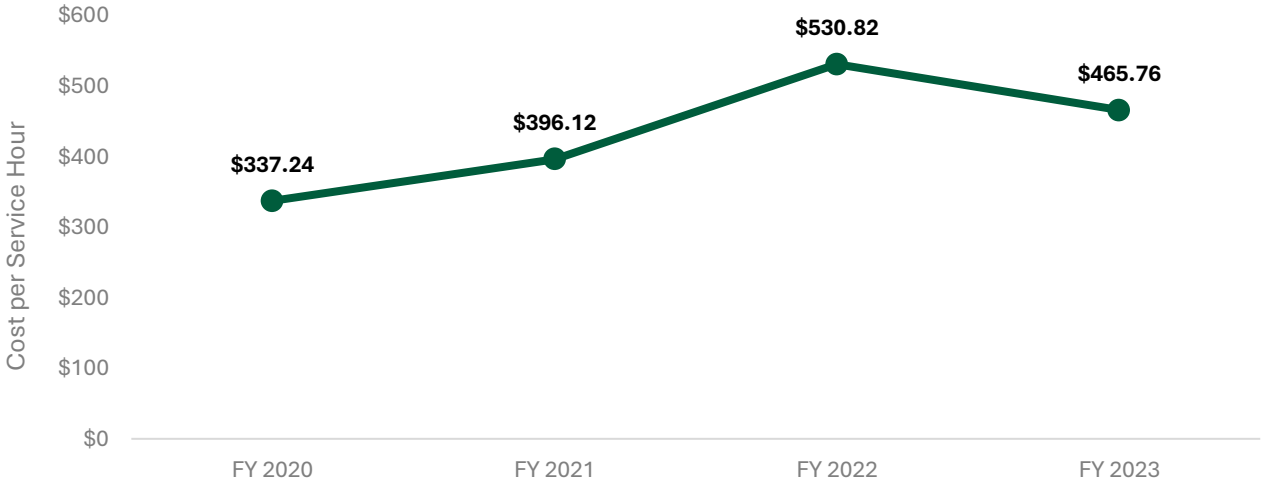
Source: National Transit Database FY 2023
Note: In March 2020, the COVID-19 pandemic began affecting service and ridership. In October 2021, the Blue Line derailment and subsequent temporary removal of 7000-series railcars impacted service.

Figure 10: Metrobus Service per Rider

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. 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.

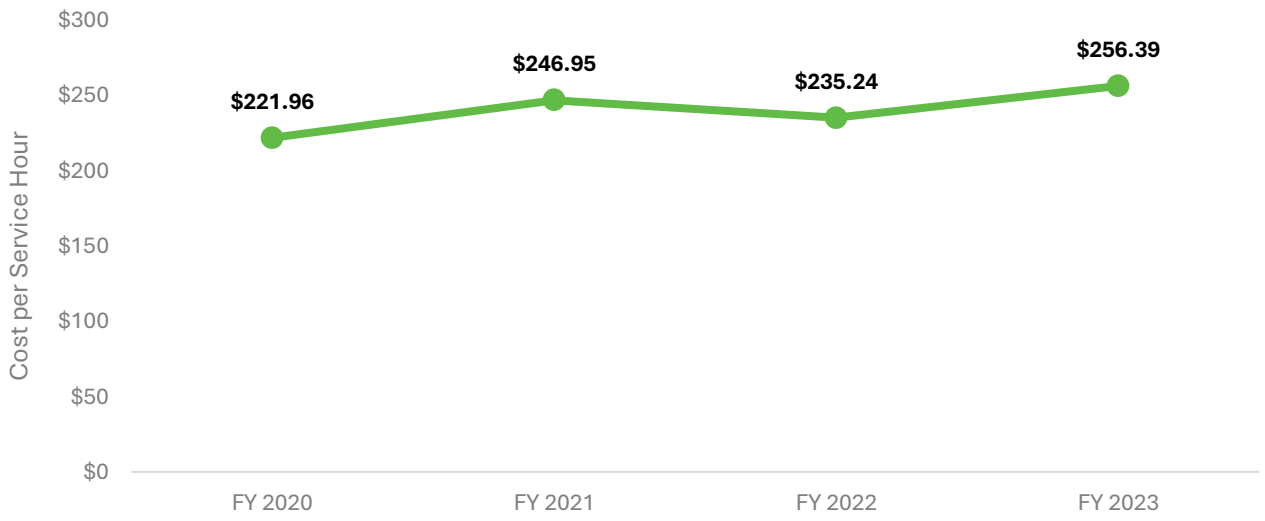


	FY 2020	FY 2021	FY 2022	FY 2023
Cost* ÷	$1,153,775,048	$1,244,974,967	$1,221,960,685	$1,483,819,870
Service =	3,421,264	3,142,911	2,302,036	3,185,833
Cost per Service Hour	**$337.24**	**$396.12**	**$530.82**	**$465.76**

* 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* ÷	$706,322,337	$719,628,976	$845,757,291	$967,654,253
Service =	3,182,178	2,914,017	3,595,310	3,774,118
Cost per Service Hour	**$221.96**	**$246.95**	**$235.24**	**$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 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)

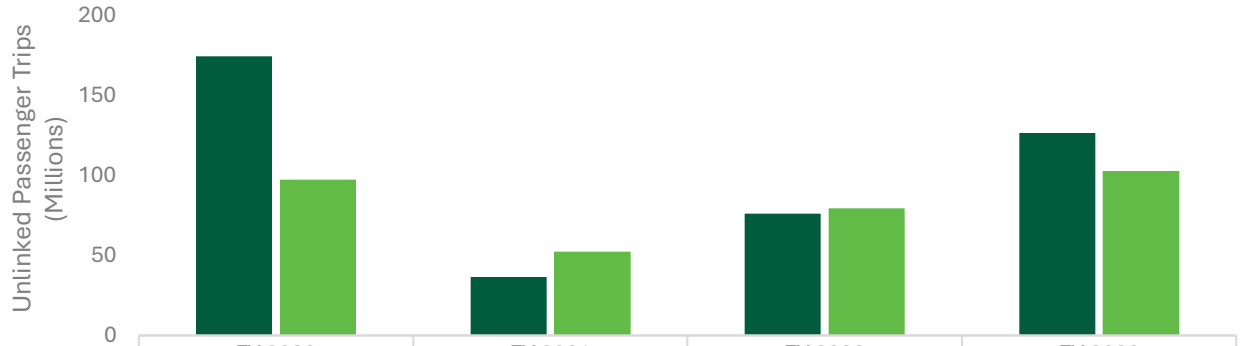
2. Passenger Miles Traveled (PMT)

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.



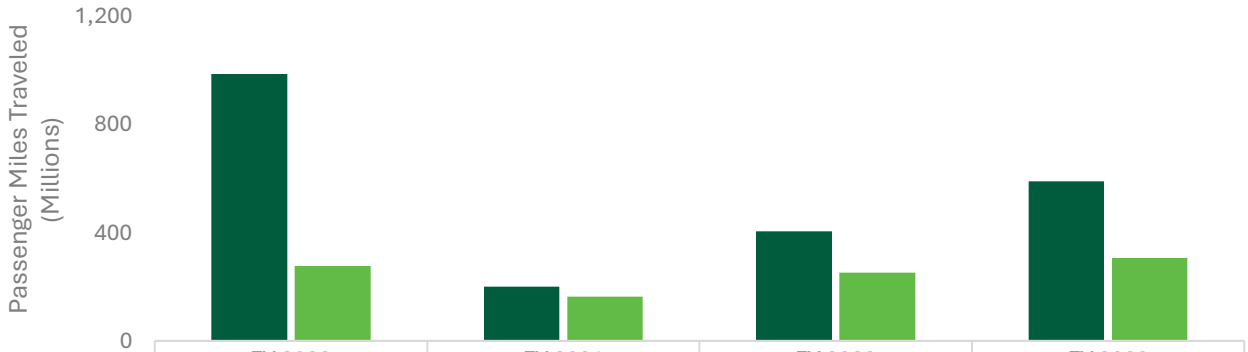
	FY 2020	FY 2021	FY 2022	FY 2023
Metrorail	174,540,714	36,550,201	76,077,714	126,773,716
Metrobus	97,210,648	52,325,667	79,512,639	102,855,922

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).



	FY 2020	FY 2021	FY 2022	FY 2023
Metrorail	985,922,295	199,671,853	404,715,396	589,321,101
Metrobus	275,963,172	162,783,718	251,623,377	307,224,136

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 Ratio[66]

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 Trips[67]

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 ÷ Number of Unlinked Trips) × 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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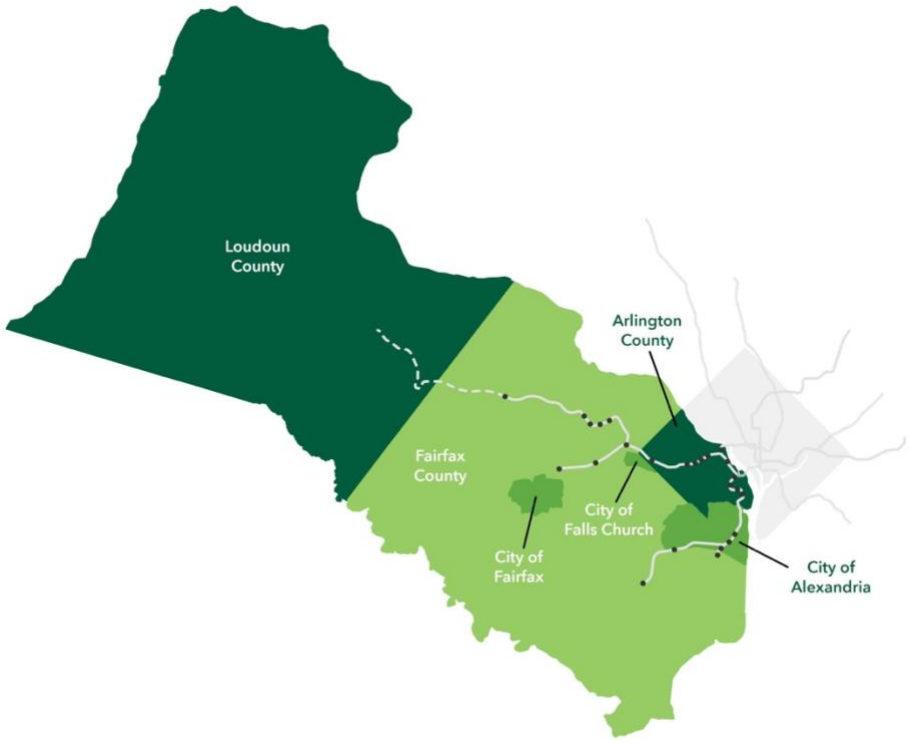
About NVTC

The Northern Virginia Transportation Commission (NVTC) was established to manage the Northern Virginia Transportation District and is charged with the funding and stewardship of the Washington Metropolitan Area Transit Authority (WMATA) on behalf of the jurisdictions of Arlington County, City of Alexandria, City of Falls Church, Fairfax County, City of Fairfax and Loudoun County. Founded in 1964, in part to represent the interests of the Commonwealth during the creation of Metrorail, NVTC continues to serve as Virginia's voice on the WMATA Board of Directors through its appointments to the panel. The WMATA Board determines the authority's policy and provides oversight for funding, operations and the expansion of transit facilities.

NVTC also manages more than $200 million in state assistance to WMATA on behalf of its jurisdictions. NVTC ensures that all its jurisdictions' voices are represented on the WMATA Board, coordinates regional transit efforts that directly affect systems serving Northern Virginia and engages in regional transportation planning, data analysis and reporting, which provides direct benefits to WMATA and the related Northern Virginia transit network.

NVTC also administers the Commuter Choice Program, which invests toll revenue into multi-modal and transit projects along the I-66 Inside the Beltway and I-395/95 corridors, and co-owns the Virginia Railway Express (VRE), which provides commuter rail service connecting Northern Virginia to the District of Columbia.

The Northern Virginia Transportation District



Submitted to the Governor and General Assembly December 2024

Read full report: novatransit.org/programs/metro/annual-report-on-wmata/

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