



Metropolitan Transit Commission



February 28, 2024

METROPOLITAN TRANSIT COMMISSION

Wednesday, February 28, 2024

5:30pm

Charlotte-Mecklenburg Government Center

Conference Room 267 - WebEx

AGENDA

- I. Call to OrderCommissioner Leigh Altman
 - Attendance (Introductions)
- II. Approval of the January 24, 2024 Summary (p.5-20)Commissioner Leigh Altman
- III. Public Comments
- IV. Transit Work Group Update..... No Report
- V. Legislative Update (p.22-30)Holland and Knight
- VI. Interim Chief Executive Officer's Report (p32-62). Brent Cagle
 - Summary of Monthly Statistics (p.32)
 - Safety Reports (p.34-45)
 - Ridership Reports (p.47-53)
 - Communications to MTC Board Members (p.55-56)
 - Sales Tax Report (p.58)
 - Progress Report (p.60-62)
- VII. Informational Items
 - Transit System Plan Implementation Strategy (p.64-79) Kelly Goforth
Joshua Schank, PhD, InfraStrategies
- VIII. Action Items
 - No Action Items
- IX. Report from the Chair of the Transit Service Advisory Committee (TSAC)Jarrett Hurms
- X. Report from the Chair of the Citizens Transit Advisory Group (CTAG)Jeffrey Parker
- XI. Adjourn

METROPOLITAN TRANSIT COMMISSION
MEETING SUMMARY
January 24, 2024
(Approved on February 28, 2024)

Presiding: Commissioner Leigh Altman, Mecklenburg County Board of Commissioners

Present:

Mayor Vi Lyles (City of Charlotte)	Mayor David Phillips (Town of Pineville)
Mayor Woody Washam (Town of Cornelius)	Tony Lathrop, Esq. (NCDOT)
Andrew Grant (Town Manager, Cornelius)	Brad Thomas, Esq. (City of Charlotte)
Mayor Rusty Knox (Town of Davidson)	Mayor Richard Franks (City of Gastonia)
Anthony Roberts (Town Manager, Huntersville)	Michael Peoples (Town Manager, Gastonia)
Mayor John Higdon (Town of Matthews)	Randi Gates (Director of Transportation, Gastonia)
Commissioner Renee Garner (Town of Matthews)	Bill Thunberg (Town of Mooresville)
Mayor Brad Simmons (Town of Mint Hill)	L. J. Weslowski (Transit Director, City of Concord)
Brian Welch (Town Manager, Mint Hill)	

Interim CATS Chief Executive Officer: Brent Cagle

I. Call to Order

The hybrid regular meeting of Metropolitan Transit Commission was called to order at 5:30pm by MTC Chairwoman Commissioner Leigh Altman, Mecklenburg County Board of Commissioners.

MTC Chairwoman (Commissioner Leigh Altman) Statement

I would like to make a brief statement on the passing of Mayor Walker Reid III of Gastonia. Since our last meeting, many of us were shocked to hear of his passing.

His death is a tremendous loss not only for the City of Gastonia but for the entire Charlotte region as a whole. Mayor Reid's unwavering love for the City of Gastonia was unmatched. His work and insight and contributions to the Commission and the entire Charlotte region was vital to the progress we have made in ensuring that our plans and goals have the support of regional partners.

A lifelong public servant, Mayor Reid spent 22 years serving as Mayor Pro Term and City Council member before being elected as the City's Mayor in 2017. Mayor Reid was later re-elected to a four-year term in 2019.

He was a pioneer and compassionate leader who was truly passionate about service to his people. His contributions were not limited to public service, prior to his retirement, he served as an Assistant Fire Marshal, Fire and Life Safety Educator of 23 years for the Mecklenburg County Fire Marshal's Office.

This is just a snapshot of his many contributions, but I wanted to make sure that we took some time out to honor him today. I ask that we continue to keep Mayor Reid's widow and family members as we continue; and as they continue to deal with that immeasurable loss.

II. MTC Appointments

1) Appointment of MTC Vice Chairperson

Mayor Woody Washam (Town of Cornelius) nominate **Mayor Rusty Knox (Town of Davidson)** for appointment; no other nominations were made. The appointment carried unanimously.

2) Appointment of 2024 CRTPO Representative and Alternate

A motion to nominate **Mayor John Higdon (Town of Matthews)**, as the CRTPO Representative was made by **Mayor Vi Lyles (City of Charlotte)**; and seconded by **Mayor Brad Simmons (Town of Mint Hill)**. The motion carried unanimously. **Mayor Brad Simmons (Town of Mint Hill)** nominated himself to serve as the CRTPO Alternate. No other nominations were made.

3) Appointment of Advancing the Plan Representative

Mayor Woody Washam (Town of Cornelius) nominated himself to serve as the Advancing the Plan Representative; no other nominations were made. The appointment carried unanimously.

III. Review of Meeting Summary

The meeting summary of November 15, 2023 was approved.

IV. Public Comments

1) Marc Moore – I am speaking on Envision My Ride and why prioritizing it as part of any region plan is both critical to the region and fiscally responsible making more progress for more people for less money and less time.

Envision my ride is a transit plan and a roads first plan. Our roads are not just for our cars, our bus system, people walking and biking rely on them just as heavily. Envision My Ride includes signal improvements on NCDOT roads for drivers and sidewalk improvements for pedestrians and better facilities for transit riders and drivers. It also serves as a substantial part of the region rather than just one corridor or two corridors and can be built on as part of the regional plan. It is cost effective. Before inflation-- and I know things have changed since the original plan. In the original plan, the local cost was \$50M a year for 10 years.

Basically, total cost was \$300M split half between local and other sources. That puts it in a place where it would be something that could potentially be started while we wait for moving toward something like the tax in 2025 which we discussed is not coming very soon.

While they are important long-term, the Red Line's total cost before inflation was \$700M. The Silver Line Phase 1 was over \$5B and express lanes in 1-77 south is about \$2.1B. Including dedicated lanes according to the plan would unlock options for more federal funding, as we have seen with Raleigh's BLT and other options that can be done fairly affordable. New Bern's BRT is only about \$100M, at least as originally proposed. We'll see if that changes?

I just wanted to, as someone who is a current rider and understands the mix of having to deal with the short-term and long-term and criticality of making progress on a somewhat short-term basis that prioritizing Envision My Ride is fiscally responsible to make substantial transit improvement more region in less time and a critical part of any roads first plan.

Thank you for letting me speak to you today.

2) Gray Maddrey – I'm here on behalf of the Charlotte Metro Chapter of Democrats Socialist of America as one of it elected Co-Chairman.

I attended a TSAC meeting earlier that month where I announced the Charlotte Metro Chapter commitment to prioritizing public transit in our organizing for 2024 and this priority came about as the result of canvassing bus riders last year where we learned the breadth and depth of the problems served by those who depend on but lack a reliable bus system in Charlotte.

At the meeting we asked Brent Cagle and other CATS staff about the contract with National Express Transit their plan to reverse the decline in bus ridership over the past decade

and especially since the outbreak of COVID-19. We look forward to hearing the report back on these questions at the February TSAC meeting.

In light of our chapter 2024 priority, we're excited to hear about the mobility priority that Charlotte City Council set for 2024 of their recent strategy retreat. But the question is just what does this really amount to?

Marcus Jones was reported to have said that the 1 cent sales tax, if it were to be implemented, it would generate \$345 million in its first year. That revenue alone is 36% greater than CATS total expenditures in the to 2024 adopted budget. However, even after accounting for inflation, the 2024 CATS expenditures are, already, 31% greater than they were in 2013 when bus ridership was at its peak, three times greater than today.

To be clear, we're in favor of expansive public investment and transportation throughout the metro region. But these numbers help illustrate is we believe prior to any particular budget, there's a political choice to spend it in a particular way. People in Charlotte are suffering today because of how today's money is being spent.

When Jones wants to find ways to invest in transit sooner than a potential sales tax referendum, we wonder where the problem is because that could start with getting bus service levels back to where they were, not last year or five years ago but at the peak of CATS service because if it was done before, it could be done again if you choose to do so. Thank you.

3) Steve Yaffe – I live in Montclair neighborhood near the light rail station. I'm a member of the Charlotte Regional Transportation Coalition. I'm also a transit consultant. I have been in the field for almost 45 years. Primarily I want to talk about public engagement, and I am aware that the agenda for this meeting is posted on Friday before the Wednesday evening meeting.

Question is, could a head's up be provided on the issues to be in MTC's headlights a full week before? That would provide stakeholder groups enough time to choose a spokesman who would have the weekend to prepare remarks. When that preliminary and I understand it would be a preliminary agenda of stuff happening at the last minute could be circulated among those organizations who have registered interests in transit distributed geographically and demographically in the CATS service area.

I have had emails back and forth with Emily Kunz and I appreciate the plans that the CATS Communications department has to upgrade the publicinput.com website to make input especially to MTC and the component committees easier.

I was encouraged to talk about frequency. I will take off my CRTC hat and put on my transit consultant hat. The secret sauce, of course, reliability for building back bus ridership, ride time, which Envision My Ride would do, but I can tell you from experience, having a route that connects a variety of higher intensity land uses is the secret sauce and having that done every 15 minutes or better all day every day. I oversaw the Arlington transit service In Arlington, Virginia. Our magic route was not a direct route.

Yard 41 is shaped like a Z, connecting two high intensity low income neighborhoods with a Boston corridor, which is high intensity mixed use development office, retail, commercial. And once we put in that 15 minutes and once, we went well past 9:00 at night to midnight ridership boomed. The pandemic had its effect but it's still doing very well. Thank you very much. Appreciate the opportunity.

V. Transit Work Group Update – No Meeting

VI. Interim Chief Executive Officer's Report – Based on pages 19-74 in the MTC Agenda Packet for January 24th, 2024.

Discussion:**INTERIM CATS CEO CAGLE:****Summary of Monthly Statistics**

Starting on page 19 of your packet are our summary of monthly statistics. What we are trying to do routinely provide monthly statistics. That is routinely the norm. We're trying to improve on those reports, and this is a work in progress. The first iteration of this is to provide you a summary of the details behind that. As we move forward, we want to create less of individuals reports and more of a comprehensive monthly report in a format for you to make this easier. The page 19 and 20 are summaries of the information provided behind it in the monthly statistics.

Safety

A couple of things to note, special transportation services on their safety performance measures. We did have a preventable collision with damage greater than \$500 in the month of December. This was simply an accident. The bus made contact with the rear of another vehicle. It was a minor accident, but none the less, it was still an accident and therefore reportable.

Ridership

When it comes to ridership, we have seeing increases in ridership. Overall ridership continue to increase during the month of November at 12.8% and December at 9.8%. Those are all good signs. We continue to see positive ridership trends across all modes and local routes were up 11% in November and in December, the same local routes were up about 9.2%. We would expect that in December on local routes with the holidays and those kinds of things.

Our express routes experienced an increase of 14.4% in November and then 2% in December. Again, especially on express routes, I do believe that the holiday plays into those numbers since express routes are predominantly used by those commuting to work.

In rail ridership. Again, we saw a positive increase to 16.4% in November, 12.8% in December. Those increases are driven entirely by the Blue Line. We continue to see the one weak spot in ridership increases has been the Gold Line, and we continue to see decreases month to month on the Gold Line. However, that is, and all likelihood, a direct result of the 30-minute headways on the Gold Line, versus the 20-minute headways.

Communications

When it comes to staffing, I think we mentioned back in September, the staffing challenges we were facing and therefore, the need to move to the 30-minute headways on the Gold Line, I will say staffing all of our staffing numbers are looking much better over the last year. We are now at approximately a 19% vacancy rate. Still a little bit higher than the average. Averages across the city, City of Charlotte, somewhere in the 13 to 15% range. We're still trending a little bit higher than generally the city. But we're much more in line with it. When I started 13 months ago, we were seeing vacancy rates in the 40, 50, 60% range in some of our workgroups. Critical vacancy levels, all of those vacancy levels have been brought down significantly.

One of the areas on vacancies, it's a catch 22 on this, we see high vacancies in rail car maintenance group. That is because it takes approximately 18 months for training before you can be certified for rail car maintenance. The good news for that is we have seen a sharp increase in trainees in rail car maintenance. As we work through the training protocols, that vacancy number will also start to come down. As I mentioned, we want to create better

information to the MTC so my recommendation would be on moving forward that we start to report full-time positions, vacancies and number of trainees as a general month-to-month report since that is so critical to our business and being able to make service.

In addition, we talked a lot over the last 13 months about missed trips. I think you'll recall we had a low spot over the last 24 months of something like in the neighborhood of 10% missed trips monthly. Those numbers have also with additional staffing, those numbers have gone down and last month, they were hovering right about 2%. That is a marked improvement from where we are. We would like that to be 0%, and I think we have discussed in the past, what is an acceptable number of missed trips, or what was CATS' standard in the past? I think I have told you in the past, CATS didn't have an acceptable standard because quite frankly, we didn't have a missed trips problem, and we want that to get down to zero or as close to zero as possible. Those missed trips really are directly impacted by lack of staffing or lack of operators to be able to run the trips. Again, we think it's important to put in vacancies as a standard metric for the MTC.

Sales Tax

We have also included the revenues, the monthly revenues. They are on page 55-56. The reason there are two is it's December 2023 and January 2024, and we did not have a December 2023 meeting. We provided you both the December 2023 and the January 2024 numbers.

Progress Report

The progress report was created in response to the workgroup so items are not being added to the progress report, but we still do have some items on the progress report to monitor. There are two new items to report to you starting on page 58. On the progress report, there are two new items to report out to you. One is Mrs Victoria Johnson who has been overseeing our rail operations group as a special assistant to the CEO. She will be taking over rail and bus and so that completes both sides of the Chief Operating Officer and Victoria will be serving as our interim Chief Operating Officer with executive oversight over the rail and bus groups.

Victoria has been overseeing rail for the last approximately 12 months shortly after I joined CATS 13 months ago.

The other item to report are the bridge inspections, a year ago, we noted our aerial structures and bridges all were overdue for inspection. We completed those inspections with the exception of six bridges. The reason those six bridges have not been inspected or have not been inspected is a required right of entry agreements and scheduling through railroads because they are in railroad right-of-ways. We received the right of interior agreements, and we are waiting on the flagging crew to be able to enter the right-of-way. The railroads involved; we are on the schedule. They have provided us flagging crews and we have started the inspections and anticipate completing all of the inspections by the end of this month, at which point, we will provide yet another update in February on this the status of those inspections. The bridge inspections are close to complete. That is good news.

The only other couple items I wanted to make you aware of were just current events related to CATS. On December 22nd, we had a bus operator, his bus was on LaSalle Road. The bus operator was struck by a stray bullet. He was shot. CMPD is investigating. The stray bullet came from a vehicle, and it appeared to be an unrelated incident, right? The bus happened to be on LaSalle Road while these two vehicles. There was apparently a gun fight between occupants in the vehicles. Stray bullet entered the bus, struck the bus driver high. Depending on the report, high in the chest or low in the neck, somewhere around his collar bone. The operator is okay. Great news, he was transported immediately. Went into surgery.

He is okay and recovering and making a recovery now from his physical injuries and certainly we will continue to provide you updates as he continues to recover. Transit Management of Charlotte continues to check in on him to see how he's doing and assess his ability to return to work.

I will note Mr. Jahmal Pullen with NCDOT SSO is with us this evening. He's going to provide you an update on the January 6th, NCDOT directive, directing CATS to remove from revenue service its 100 and 200 Series light rail vehicles from revenue service. Revenue service is using the vehicles for day-to-day service to make the scheduled service. That's what that means. On January 6th, we received a directive from NCDOT to remove those 100 and 200 vehicles from revenue service. We complied with that directive. I'll go back to why that directive came out, but I want to hit on a couple of things.

One thing is we've provided everyone this handout and as soon as we talk through these things, sometimes some of the industry or the rail specific things we talk about, I understand them and CATS folks understand them, but we understand it may be completely not understandable to everyone else in the room. We didn't want to overdo this. We wanted to provide you detail about a light rail vehicle. If you think about the Blue Line. One light rail vehicle has three wheel assemblies which we call trucks. Those trucks, there are two different types of trucks on every light rail vehicle. There's an "A" truck, a "B" truck and a "C" truck. The "A" and the "B" trucks provide power, or propulsion, to the vehicles and the "C" truck is in the middle and it provides ride. The "C" truck provides the ride. It does not provide propulsion. CATS, as a standard operating procedure, runs two-car trains. Two-car train is two light rail vehicles hooked together as one train. That is not a requirement. It's just something that CATS has done traditionally but doesn't have to be done. Each vehicle can operate independently as a one-car train. And then you'll see at the bottom of the graphic between the "A" and the "B" and the "C" trucks. NCDOT asked us to remove 100 and 200 vehicles on the evening of January 6th. We complied with that directive. We have exactly 42 light rail vehicles in the fleet. Of which 20 are 100 and 200 series vehicles and 22 are 300 series vehicles. The difference in them is the 100s and 200s were purchased at the inception of the Blue Line. The 300s were purchased with the Blue Line Extension. The 100s and 200s are about 15 years old. The 300s are about half that, 7.5 to 8 years old.

On a daily basis to make stated scheduled service, we require 20 light rail vehicles, i.e. we run ten trains daily. How the math breaks out is 42 total vehicles, twenty 100s and 200s were removed, but two were able to remain in service, and that's because two of the 100 and 200 vehicles had already had the truck overhaul maintenance completed on them. All right. We're at two 100s and 200s, plus 22 300s but we have to subtract one 300 vehicle that was in a large accident many years ago and it is not able to be put back in service. So where does that put us? We have a fleet of 23 light rail vehicles, which enables us to make daily service of the need of 20 vehicles. Now those 23 vehicles, that is a very lean spare ratio. What would happen if on any given day we do not have 23 vehicles available to go out? And that can happen because all of these vehicles require routine maintenance from time to time. So that could happen. What we would do, let's say, in this example, we have 19 vehicles available to start a morning, and we have a need of 20, what we would do is one train would go out as a one-vehicle train. Nine trains would go out as two-vehicle trains plus the one and as soon as we could add in the additional vehicle, we would do that. That could create an impact, although it's a very minor impact to the passenger, in that one train during the peak period may be more crowded, right? But it will be backed up by a series of two-car trains.

Where this really comes into play especially with two-car trains is those peak periods in the mornings and the afternoons, basically going to and from work, and clearly, on our busiest

day, Wednesday, it comes into play. Our maintenance crews are doing everything they can to continue sending out two-car trains especially during those peak periods, but in this period while we only have 23 light rail vehicles available, it could happen where we have to send out a one-car train for some period of time.

MAYOR HIGDON (Town of Matthews): Right now, we're running very lean. Were we really running rich previously to what? You have 40 something trains and you only need 20?

CATS INTERIM CEO CAGLE: Yes we are. Because of the maintenance needs, there is a significant amount of maintenance requirements on these vehicles and it allows you, quite honestly, to be better at what we need it to be better at, which is doing heavy maintenance. It requires the vehicles to go out for an extended period. While it does sound like a very rich spare ratio, it helps to account for those longer periods when heavy maintenance has to be completed and that can take up to six to eight weeks as we do that maintenance.

MAYOR SIMMONS (Town of Mint Hill): What's our schedule on returning trucks from rebuild?

CATS INTERIM CEO CAGLE: That's a good question. As I mentioned, two are already returned. We are in the next 60 days we have at least another two, if not another three sets scheduled for return.

Basically, now that Siemens is conducting the truck overhauls in Florida as well as California, it should expedite that and we are working with Siemens to get a better schedule of the send out and the return of those vehicles, and I will bring that back. We expect another three in the next 60 days to come back to be returned. And to that point, 23 will continue to grow, right? Because these vehicles need to remain out of service until after they have had the overhaul completed.

BRIAN WELCH (Town Manager-Mint Hill): On your light rail maintenance, is that an internal chain protocol, 18 months? Or, is there an institute somewhere that you are hoping to pull potential employees from?

CATS INTERIM CEO CAGLE: We provide in-house training to our rail car maintenance.

BRIAN WELCH (Town Manager-Mint Hill): Are you pretty well staffed up with future employees, if you will?

CATS INTERIM CEO CAGLE: We are. We will be, over the next few months, talking about our operating budget requests, and we do have requests. We do anticipate requesting additional staffing for training. That we can increase our capacity of the pipeline if you will. We are doing pretty well. We are doing far better today than we were 12 months ago.

MAYOR KNOX (Town of Davidson): You alluded to twice, we are in a better position staff-wise than we had been historically. What's the shift there? Why have we done a better job recruiting? Are we doing a better job with retainage or what?

CATS INTERIM CEO CAGLE: So many factors. The one is, I think that we are doing a good job in creating higher morale in the organization. You don't change culture in a year. But you can see the positive impacts of culture change in a year, and I think we are seeing that. Quite frankly, better pay. Operators pay or field unit pay, whether it's in bus or rail, the average increases are anywhere in the 12% to 15%. A few workgroups even higher than that. We were not competitive in our pay.

Then bus operators negotiated a new collective bargaining agreement that took effect about a year ago. Their average increases were about 12% over all of their job classes. CATS implemented the same type of pay increases, anything from 10% to 18% across our operators and our operators is the rail operators, paratransit operators, rail car maintenance and ROCC, rail operations control center. By in large, our field units, our safety and security units as well. Pay makes a big difference. It's a hard job and I think we fell behind. We were not competitive in where we needed to be. And as you mentioned, much more aggressive recruitment.

Quite frankly, another strategy that we've utilized is we are willing to overrecruit, right? We're always out there recruiting. Instead of waiting for vacancies and then trying to recruit to fill them. We're always out there recruiting and if we can bring in a steady pipeline, I would much rather be overstaffed for some period than understaffed for some period, and that was a fundamental shift in thinking. Now that does have a cost impact for sure. But it puts us in a much better position when we think about making service and maintaining operations in the schedule.

MAYOR KNOX (Town of Davidson): I would be remiss if I did not acknowledge the change in culture and the dynamic changes that have been made under your tenure as the leader of this organization. I want to thank you for jumping into this and helping to bring about this dynamic shift that we're seeing. So thank you.

CATS INTERIM CEO CAGLE: Yes, sir. Thank you.

COMMISSIONER ALTMAN (Mecklenburg County): I second that, Mayor Knox. I think this is really helpful, by the way. Thank you for the illustration.

The vacancy levels that are improving, does that mean you can improve headways? Or restore headway to what they were?

CATS INTERIM CEO CAGLE: As we get into the budget, we want to talk about that. A year ago, our frequency was impacted by lack of operators or insufficient operators. Quite frankly, as we go into the budget, everything costs more after COVID than it did before. We will have challenges not because of lack of operators restoring frequency, really because of the cost of the service to start to restore frequency as we start thinking about the future.

COMMISSIONER ALTMAN (Mecklenburg County): When you were speaking about improving vacancy levels, that was for rail. That was not referring to bus service, which is handled by the third-party intermediary. Do you know how their staffing is?

CATS INTERIM CEO CAGLE: They're staffing is improving. They're seeing strong recruit classes as well as graduation classes, classes that have been graduated. You are correct. They do not work for the City of Charlotte. I was referring to all operators, rail and bus operators as well. We'll provide more detail on that as we move forward on all of those workgroups.

COMMISSIONER ALTMAN (Mecklenburg County): I appreciate NCDOT being willing to be available virtually tonight, in case we have any follow-up questions. I do. My understanding is—But first, let me say I thank everybody who took the highest level of care and concern for the safety of residents. That's, just a baseline. But just so I can understand the thinking. Because basically NCDOT's letter pulled 50% of our trains out of service, and my understanding is that one of the trucks had excessive play in the wheels and you checked all the other 100 and 200 series and none of them had that excessive play.

To people who are asking me was this a little bit of an overkill or overcorrection. I would like to hear from you why NCDOT did give that directive just to make sure I understand all the dynamics at work?

JAHMAL PULLEN (NCDOT SSO): I'm with NCDOT and the rail division in state safety oversight program. That's under my umbrella. The reason behind the directive that we sent to CATS was that, the history before was around wheel bearings and that is within the wheel, itself. You can't get to the wheel within the operations that rail car maintenance has so, you know, they can see that the wheel was spinning, but they can't open the wheel up. That would have to be sent to Siemens to understand exactly what was behind causing those flat spots. Rail car maintenance actually had a plan to pull the 100 and 200s and park those and use 300s and only use the 100s and 200s as spares. They had not implemented that yet. They were working through that plan. What we actually did within the SSO department was just accelerate that. We said we think this needs to be implemented now. Go ahead and pull the 100s and 200s. Check them like you were and check the 300s. However, we don't want the 100s and 200s to be used as spares. They need to sit until those overhauls have occurred.

That's what we did. We just took essentially what rail car maintenance was already looking at doing, decided to go ahead and say that needed to be done now. Also not use those cars as spares.

COMMISSIONER ALTMAN (Mecklenburg County): What I'm hearing you say even though they were all inspected you didn't see the defect you would have to open up at a granular level to be sure and you weren't able to do that without pulling them all out and sending them off, is that right?

JAHMAL PULLEN (NCDOT SSO): That's right. Mr. Cagle might be able to talk to that. I think some Siemens representatives came and looked and there are other bearings and other parts within the wheel that they can't get to until they've got it in their shop.

Yes. Something to have a flat spot that soon after it had been smoothed over to have it occur again, you just don't know exactly what that is. Rail car maintenance didn't think it was a general

bearing and that was the issue the last time. There were other items within that wheel that they would not be able to analyze until Siemens has it in their shop.

COMMISSIONER ALTMAN (Mecklenburg County): Thank you.

CATS INTERIM CEO CAGLE: Yeah. I want to say starting 13 months ago, I think I lived through the wrong way to report these kinds of maintenance issues, right? We were all in it together. We got through it. I think that working together with NCDOT, our rail car

maintenance, our safety and security, our rail operators, this is-- this is the silver lining here is this is how the system is supposed to work.

This is how we identify possible issues. We investigate those issues, and we take action. We report out. I think that together in a strange way together this shows the impact of the change at the staff level, and they did excellent work, everyone involved, and I will say I really appreciated the partnership with NCDOT. It's not great to have the 100s and 200s out of service. But it is in abundance of caution, and this is really why we have safety protocol and maintenance protocols, and this is-- this is the system working.

COMMISSIONER ALTMAN (Mecklenburg County): I agree. I appreciate the process very much.

JAHMAL PULLEN (NCDOT SSO) Mr. Cagle, I want to mention that the operator did an excellent job, too, in identifying those flat spots and calling that in immediately. I did want to mention that.

CATS INTERIM CEO CAGLE: One thing to note and I don't want to get deep in the weeds about train stuff, there's two things out there, flat spots and wheel play. A flat spot occurs on wheels, and it is exactly what it sounds like, a wheel gets a very small flat spot on it. Usually the depth, the skinny side of a dime. We're talking about one to two millimeters, and what happens is for a passenger it may not even be noticeable. Right? They may hear it. Usually, the indicator of a flat spot is as the train is moving forward, it clicks as that flat spot hits the rail.

Operators are trained to hear that and know that is a suspected flat spot and report it, and that's exactly what happened in this case. First time it happened on 12/30. Flat spots happen. They are normal and we have a maintenance protocol for trueing the wheel or removing the flat spot. On December 30th, an operator noted it on this LRV. They reported it. Rail car maintenance did their job. They trued the wheel. They did a test run.

Everything was fine and it went back out. On January 4th, an operator reported tell-tale sign of clicking. Went straight back into rail car maintenance. On the 5th, they diagnosed it as a flat spot. But on this instance, they said, wait a minute. Flat spots are not uncommon, but they shouldn't occur in a five-day period. That's not normal. Rail car maintenance initiated a further investigation and upon investigation what they found was-- this is the root of the issue. This is the real problem, was excessive play in the wheel.

I'm not a really technical person. If you think about looking at a wheel from the front. It's rotating, it should be straight up and down. It shouldn't wobble. Excessive play in the wheel means it's wobbling. It went back and forth. It had some wobble in the wheel. The accepted tolerance for excessive play is zero. There should be no excessive play in the wheel. When rail car maintenance noted that, that is a more serious issue, safety and security was then engaged. NCDOT was engaged. As well as Siemens.

Siemens has already been on-site. They were on-site on the 8th, I believe, just after the occurrence. They did an initial review of the wheel. They agreed that excessive play should not be there, and they are going to conduct a full root cause analysis. We do not have that root cause analysis completed yet. They were estimating in the next 30 to 60 days that root cause analysis will be complete.

However, as Mr. Pullan stated, we know that this was not-- these flat spots, this excessive play, was created by the journal bearing. That's what we talked about in the past, a failure of the journal bearing. However, there are many types of bearings in a wheel, and we

suspect, but this is what root cause is, that there was a separate bearing in the wheel assembly. Again, due to age likely failed. We will

know more when the root cause comes. I think in abundance of caution, until we know that, it is best to get that maintenance done and to work through that process.

VII. Informational Item

Chad Howell

Chad Howell – CATS Chief Finance Officer – presented the FY-2025 Budget Update; based on pages 62-77 in the MTC Agenda Packet for January 24th, 2024.

Discussion:

CATS INTERIM CEO CAGLE: Thing to note, the projected expenditures, we are projecting to be balanced. There's been a little plus and minuses in certain areas, but we continue to project to be balanced. Where does that come from?

When you see the last column there, transfer to reserve, what that really means is dollars that are in effect transferred to our-- to the CATS-specific reserve fund and then can be available for future use or capital or operating or any use. What we're really saying is financially, we are stable. We're projecting a balanced budget at the end of the year. What the difference is, there's less transfer to reserve because it's being spent for the day-to-day operations.

Now, is that concerning? That's a fair question. Our reserves currently, we have a requirement to maintain at least, at a minimum, \$130M in reserve funds. Those are requirements that we have per policies and bond covenants when we issue debt. We have well in excess of \$130M. We have no risk by not transferring to reserve being at risk of dipping below that \$130M required reserve. We still have ample reserves for our capital needs and to meet all of the bond requirements that we have.

CATS CFO HOWELL: Just to add a little bit more to that. We closed FY23 with a little over \$200M in total reserves. We're well above the \$130M requirement. I will say, too that with the personal services here, I'm glad I got a chance to address this a little bit. We learned from that. We learned quickly, and those are captured, as we present the FY2025 budget next month and go through the operating expenses in details and seeking your guidance on that. You'll see that we have captured and annualized all of those costs.

CATS INTERIM CEO CAGLE: Chad's being a little bit too hard on himself, I think. There was clearly transition issues, lack of transition issues, but in prior years before we pulled together this budget, it had been the practice of CATS to budget the TMOC employees in the personal services lines and what that means is budgeting their benefits, their FICA, all of those things that come when you're budgeting a salary, they're doing that which is very odd. I have never seen a contractor budgeted in personal services. It gets budgeted in operating expense. This was one that, as Chad mentioned, we didn't see it. It is an odd thing. That lack of transition certainly affected us as we sort of jumped in to pick up the reigns in December when the former CEO and CFO departed.

That's not a mistake we will make again. But the good news is we do have adequate revenues to support the expenditures in the current year.

MAYOR SIMMONS (Town of Mint Hill): I'm sure that \$130M is a moving number and it's more every year, does the cost of operation go up or does it stay the same?

CATS INTERIM CEO CAGLE: It is a set target. It can be evaluated from time to time. One question has been asked, well, \$130M sounds like a lot of money. Is it enough? And so that's true. There is no magic number, right?

You can't go out to every transit agency and say, well, how much do you have? The right number is really dependent on the revenue source and the biggest factor for us is sales taxes. They're a great revenue source. And at the same time, they're the least stable revenue source out there.

Property taxes would be far superior, but sales taxes are great, but they are least stable from a financial standpoint. We think that given our primary stream is sales taxes, we really \$130M is adequate, but it is just adequate. We would like to see over the longer-term building that. As Chad mentioned, we do have well over \$130M in reserves, even though it's not required. We have approximately \$200M.

It doesn't fluctuate other than if we have to re-evaluate it. I think \$130M as a minimum is sufficient, but given our sales tax revenues, it certainly is not excessive and, but we do have additional reserves.

MAYOR HIGDON (Town of Matthews): What percentage of your revenue source -- I know it's very small -- is from passenger fares? You showed \$14M. It's pretty low, right?

CATS INTERIM CEO CAGLE: It is.

MAYOR HIGDON (Town of Matthews): The reason I ask, I forget what network, something over the weekend I saw where there is not an expectation nationally that we're ever going to return to pre-pandemic, everybody in the office five days a week, because people are not accepting that. They're quitting jobs that require them to be in the office five days a week. Just making that comment. I'm sure you are making that consideration. But passenger fare is a very small portion of your budget, correct?

CATS CFO HOWELL: 10% or less.

CATS INTERIM CEO CAGLE: Pandemic, it was lower than 10%. With riders increasing, it's recovering, but it will always be a relatively small percent.

Now, on fare -- our fares are not the highest out there, but they're certainly not the lowest. One of the things that we're looking at, embarking on this year, is a fare study to see if there is a better way to set fares from an equity standpoint but also from a revenue standpoint. In an odd way, by lowering fares, we actually may be able to address equity and generate additional revenues through lowered fares.

There's literally an entire science in sort of setting fares and the best way to do that and we're going to hire the folks who know that science to make recommendations across the entire system on all modes on the best strategy for setting fares. Our fares are out of date. For sure.

JARRETT HURMS (TSAC Chairman): Going back to Mr. Cagle talking about labor, we're at about 19% of vacancy rate. Are we on budget to be able to; in the hopeful event that we were to be able to fill in that 19% and have new labor. Are we on budget to be able to maintain that for fiscal year '24?

CATS CFO HOWELL: We'll cover in '24. We'll get through the year and more importantly, we're planning for that, and that's part of why we're taking our time to vet through

the numbers for '25. In order to capture what do we think we will need to be with staffing to meet the service levels that we need to have.

JARRETT HURMS (TSAC Chairman): Last year, you mentioned that one of the priorities is bus stop amenities. I wanted to make sure that was the case for this year. When it comes to primary revenue being sales tax and that being more volatile than others, are there other areas that you may to increase the revenue to be able to cover for the potential volatility in the sales tax revenue?

I'm looking forward to seeing what can be reached from a report when it comes to looking at fares across the board. Because improving and lowering fares can be more equitable and also, could bring in more ridership.

CATS CFO HOWELL: I can address those broadly. In response to the bus stops. We did last year talk about we were going to ensure that the priority of money that we had was spent and allocated as quickly as we could, and we did add new money to it for this year. That's still underway now. That is part of our capital program, and as we get into the capital program for '25, through '29, our five-year rolling capital program, we'll be looking at continuing that focus. We understand that's very important to the commission. We'll be looking at that and bringing that back as part of our capital budget presentation in large.

I will turn to revenue sources. That's music to my ears. Anytime -- even if sales tax were not as volatile as it could be, anytime you can diversify your revenue stream is a good thing. We are, for example, one of the areas we're looking at and it's not going to be a panacea that solves it all, but we are looking at advertising revenues, things like that, to see if we can maximize those. Are we collecting those in the way that is creates a stronger revenue stream for that, and then other areas as need be.

I will jump ahead a bit and say one thing that we are not looking at for '25 is increasing fares. Fares will stay. The proposal right now and what we're looking at right now is they will stay where they are now. Pending the results of the fare study. That's when we're not looking. But yes, generally we are looking at what other transit agencies are doing, where we see some capacity for additional revenues because, again, the more you can diversify your revenue stream, the better, safer it is.

VIII. Action Item - None

IX. Transit Services Advisory Committee (TSAC)'s Comments

Jarrett Hurms (Chairperson – City of Charlotte) reported the following: >> The reports will be December 2023 and January 2024.

With the departure of Krissy Oechlin from TSAC, we held election for Chairman and Vice Chairman. I (Jarrett Hurms) am now Chairman and Bob Moore is Vice Chairman. Mr Moore has been an excellent member. I'm glad to have him as our Vice Chairman.

One of the last things Christy did as the Chairwoman of TSAC is the creation of the annual report for TSAC. Highlights I want to share with you all of our accomplishments include:

- 1) Improving dedicated funding for bus stop improvement. Being able to see it in last year's budget brought a lot of excitement for us.
- 2) Fare capping in 2022 has provided great savings to our riders, which has been good.
- 3) CATS newly formed Customer Experience Team led by Pamela White is a very great change within CATS because we as TSAC are uniquely wanting to be able to leverage for our panelist

and new roles. We're very excited to see what that is going to bring into 2024.

Issues that need to be addressed include things such as:

- 1) The CATS app, need to better reflect stops that are existing or not existing as well as updating bugs.
- 2) Many of our recommendations that elected officials at some point this year try to really spend the day riding transit so you can be able to experience, be able to see what it is like for the riders and those are your constituents.
- 3) And then, of course, one of the big ones is always service frequency.
- 4) Making sure that CATS is more transparent to recruit and retain bus operators and hire net new labor to be able to help with frequency.

I was very pleased to be able to hear the progress so far, but there's still progress to be made.

In January, we had the cochairs from the Charlotte Metro DSA and they made a lot of very good points when it comes to how the current frequency has affected the working class within the Charlotte metro area. It's very important and I'm glad it's part of their priorities for this year and it's something that speaks very true to many of the TSAC members. We had the interim CEO report which includes a lot of the stats as far as the issues for the train, and we are also very grateful for Mr. Cagle being able to come to some of our TSAC meetings. Finally for the CATS advisory board structure. We voted unanimously for staff to have an exploration of the CATS advisory board structure, which in terms of how the structure how the structure will be, could there be a potential merging of TSAC and CTAG. The exploration of the CATS advisory board structure. We're very excited to see what can come of that.

X. Citizens Transit Advisory Group (CTAG) Chairman's Comments

Jeffery Parker (Co Chairman- Mecklenburg County): reported the following: Mr. Howell gave us the budget update as well as the financial management oversight audit update. The things you heard here tonight were things we had discussed in our meeting.

Mr. Cagle, as always, has given us a great education on light rail maintenance. I never knew that I would know so much how light rail vehicles are maintained but thanks to Mr. Cagle for helping us out with that and really providing us with perhaps more insight than we ever thought we would have into that.

Finally, we also talked about the structure of CTAG and TSAC and the possibility of combining them into one committee. We had a brief discussion about that. Some members at least brought up the idea that it might get unwieldy having too many people in one board. I think some members are concerned about the opposite problem being if we consolidate the two and remove members, then it would result in maybe a lack of representation. We had some discussion around that, but ultimately, we also took a vote and came to the unanimous conclusion that we should move forward with studying as well; along with our TSAC friends.

Discussion:

MAYOR HIGDON (Town of Matthews): Can one or both of you comment on how the scopes of what your mission is are different or the same?

JARRETT HURMS (TSAC Chairman): Speaking broadly, TSAC is on the general operation within CATS. We talk into the minutia, if we were to alter certain routes or the alignment of certain routes, how that will look, things such as Title VI analysis, when it comes to routes. We

do a lot within that. Some of the presentations that you guys have, we will get. We get interim CEO reports, such as the plan on the vehicles. We also talk about things such as service issues and the customer experience.

Obviously, there is a more budget focus when it comes to CTAC and Mr. Parker can elaborate more on that.

JEFFERY PARKER (Co-Chairman-Mecklenburg County): As Mr. Hurms stated, our primary focus is the budget. Our four big months are January thru April. Sort of a secondary part of our mission is to evaluate the long-term transit plan, capital plan, provide recommendations along those lines.

Informally, we do provide some advocacy. This is more TSAC's, or at least my understanding of how TSAC runs, but informally, we are also transit advocates as well, but primarily budget, secondary is long-term transit plan.

MAYOR HIGDON (Town of Matthews): It seems like there is some overlap.

BOTH CTAG & TSAC Chairmen: There is overlap.

COMMISSIONER ALTMAN (Mecklenburg County): The study will happen, and we'll get more information then.

XI. Other Business

INTERIM CATS CEO CAGLE asked the MTC to consider adding two special meetings to the MTC calendar. The purpose would be to hold two budget workshops on February 28th at 3:00 p.m. and March 27th at 3:00 p.m. In addition, the April MTC meeting will need to begin at 3:00 p.m. due to the timing of the CRTPO meeting. There were no objections to the adjustments to the MTC 2024 calendar.

COMMISSIONER ALTMAN, (Mecklenburg County) shared the following: Before I take a motion to adjourn, let me just make a comment and see if anyone else has any final comments. I really want to thank CATS and Mr. Cagle.

I really feel that we're on a good track, and specifically to say that I'm excited that Mr. Cagle and Jason Lawrence have been wonderfully available.

I've been meeting them and chair of the school board and top-level transportation staff with CMS. We've been meeting monthly for the last six months.

Every single month, we make a little more progress towards what could be an innovation of collaboration between CATS and CMS.

I want to publicly thank you for that dedication and every single month I get excited because we're a little bit closer.

Secondly to thank the interim CEO, because he will come to the Mecklenburg County Board of County Commissioners on February 20th, just for a visit, just to hear what the questions are and bring them up to speed.

During the pandemic, our public health Director would visit each of the towns and in a regular cadence because there were a lot of questions at that time. She was very available. It really did a

lot to build relationships and clear up questions as we went through that process.

I think it's wonderful and I'm so grateful that Mr. Cagle is going to come to the County Commission. I know he's equally available to any of your boards. That a great way to build relationships and all can get harmonized.

CATS INTERIM CEO CAGLE: Thank you. As Commissioner Altman said, I am always available if you would like a CATS update to your town's commission. I'm happy to do that. Just let me know and we are happy to coordinate.

The last thing I will say, not too much more time. Another thing we wanted to do, we probably in CATS lose sight of all of the articles we see in the industry. A lot of the issues we face here in Charlotte, these are industry issues, right? A lot of transit agencies are looking for ways, solutions and innovations. We wanted to start providing a sampling of the some of the articles that we think are relevant to issue here's in Charlotte. We will do that as they come out and make them available. Not officially part of the agenda but something we wanted to provide you.

XI. Adjourn

The meeting was adjourned at 7:05 p.m. by Commissioner Leigh Altman, Mecklenburg County Board of Commissioners – MTC Chairperson.

NEXT MTC MEETINGS: WEDNESDAY, FEBRUARY 28TH, 2024. THE MTC BUDGET WORKSHOP STARTS AT 3:00 P.M. THE REGULAR MTC MEETING STARTS AT 5:30 P.M.

**METROPOLITAN TRANSIT COMMISSION
INFORMATION ITEM
STAFF SUMMARY**

SUBJECT: Federal Update

DATE: February 28, 2024

- 1.0 PURPOSE/SCOPE:** The federal lobbying team providing services for CATS will provide an update of federal legislative matters of interest to public transportation systems, including legislative activities, appropriations, and competitive grant opportunities.
- 2.0 BACKGROUND/JUSTIFICATION:** Rich Gold and Jeff Boothe form part of the federal lobbying team for CATS. Rich is a partner with Holland & Knight LLP and leads the firm's Public Policy & Regulation Group. Jeff is President of Boothe Transit Consulting, LLC. Rich and Jeff are well versed in federal transportation policy.
- 3.0 PROCUREMENT BACKGROUND:** N/A
- 4.0 POLICY IMPACT:** N/A
- 5.0 ECONOMIC IMPACT:** N/A
- 6.0 ALTERNATIVES:** N/A
- 7.0 RECOMMENDATION:** This presentation was requested by MTC Chairperson Altman.
- 8.0 ATTACHMENT(S):** Presentation – Federal Update

SUBMITTED AND RECOMMENDED BY:



Brent Cagle
Chief Executive Officer, Charlotte Area Transit System
Assistant City Manager, City of Charlotte

Federal Update

Rich Gold, Jeff Boothe

February 2024

Holland & Knight

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Agenda

- Team Introduction
- Washington, D.C. Update
- Appropriations Update
- Federal Grants

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Team Introduction



Rich Gold
Partner

Rich Gold is the leader of the firm's Public Policy & Regulation Group and focuses his practice at the intersection of complex policy and political issues involving Congress, the executive branch and the media. The Public Policy & Regulation Group has been ranked among the top law and lobbying firms in Washington by publications including Financial Times and U.S. News - Best Lawyers guide.

Mr. Gold served in the U.S. Senate for Sen. Lloyd Bentsen (D-Texas) as his advisor on environmental affairs where he worked on issues related to environmental side agreements of the North American Free Trade Agreement (NAFTA). During the Clinton administration, he was a special assistant to EPA Administrator Carol Browner, with whom he helped develop the EPA's Superfund reform proposal and its administrative improvements package. Mr. Gold also served as a career lawyer in the EPA's Office of Enforcement and Compliance Assurance and Office of General Counsel.

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Team Introduction



Jeff Boothe
President
Boothe Transit

Jeffrey F. Boothe is the President of Boothe Transit Consulting LLC (BTC). As a leader in the public transit industry, he has created a niche in surface transportation policy, developing a proven track record of successfully advancing public transit projects through the Federal project approval process. He works with cities and transit agencies seeking to take advantage of federal funding opportunities that are now available under the 2021 Bipartisan Infrastructure Law.

Jeff provides advisory services to transit agencies and local governments to develop interlocal agreements early in project development towards the goal of developing Project Management Plans (PMPs). He is versed in the FTA guidance for PMPs and assists project teams in developing the PMP for FTA review in advance of securing a Grant agreement.

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Team Introduction



Shawna Watley
Senior Policy
Advisor

Shawna Watley is a senior policy professional and strategist in Holland & Knight's Washington, D.C., office. Ms. Watley has more than 17 years of experience in public policy, strategy development, lobbying, legislative and regulatory counseling, and creative solutions to corporate, nonprofit and governmental issues at the federal level. She has cultivated working relationships on the federal, state and local levels of government. This includes professional relationships with the new Biden Administration, leaders in the House of Representatives and the Senate, moderate Democrats and the Congressional Black Caucus.

Ms. Watley has extensive working relationships with moderate Democratic senators and representatives, as well as senior staff. As a former legislative assistant to Sen. Robert Kerrey (D-Neb.), she gained a keen understanding of the workings of Congress.

Team Introduction



Lisa Hawke
Partner

Lisa Hawke is a partner in Holland & Knight's Washington, D.C., office and a member of the firm's Public Policy & Regulation Group, where her practice focuses on federal relations and policy in healthcare, emergency medical services and transportation issues. She provides strategic planning, advocacy and legal assistance to clients on a broad range of legislative and regulatory matters.

Ms. Hawke spent several years on Capitol Hill as a healthcare legislative assistant to Senator John H. Chafee (R-RI) and served on the staff of the House Education and Labor Subcommittee on Labor Management.

Team Introduction



Kristian Havard
Senior Policy
Advisor

Kristian Havard is a senior policy advisor in Holland & Knight's Washington, D.C., office and a member of the firm's Public Policy & Regulation Group. With an extensive background representing clients in the transportation, economic development, infrastructure, travel technology, hospitality and aviation sectors, Ms. Havard adeptly manages legislative and regulatory issues for clients at the state, federal and international levels.

Prior to joining Holland & Knight, Ms. Havard served as the head of government affairs at the world's second largest airport, where she demonstrated high-level skills in navigating complex political landscapes, fostering strong relationships with key stakeholders, and spearheading successful advocacy campaigns.

Team Introduction



Joe O'Brien
Legislative
Assistant

Joe O'Brien is a legislative assistant in Holland & Knight's Washington, D.C., office and a member of the firm's Public Policy & Regulation Group. Mr. O'Brien works primarily with local governments and assists clients with an array of legislative and regulatory matters.

Washington, D.C. Update

- On October 25, 2023, Rep. Mike Johnson (R-LA) was elected Speaker of the House of Representatives after Kevin McCarthy was removed as Speaker.
- Last week, the Senate voted down a \$118 billion spending package providing funding for Ukraine, Israel, and Taiwan while making changes to U.S. immigration and border policy.
- As the November elections draw nearer, the likelihood of passing a border deal will shrink.
- The President is scheduled to deliver the State of the Union on March 7th. The FY 25 Budget will likely be issued as a "skinny budget" in mid-March with few details with a more extensive budget submitted to Congress after passage of the FY 24 appropriations bills.

Appropriations Update

- During the week of January 15, Congress passed an additional temporary stopgap measure to keep the government open through March.
- The bill extends the shutdown deadline until **March 1** for the Agriculture, Energy and Water, MilCon-VA and Transportation-HUD spending bills. Funding for the remaining federal agencies expires on **March 8**.
- Last month, House and Senate negotiators agreed on topline spending limits for FY 24 bills and an agreement on spending totals for each of the twelve bills, paving the way for final appropriations bills.
- With a deal in place, appropriators will begin finalizing their respective bills.

Formula Grants

- **Bus and Bus Facilities**
 - Provides capital funding to replace, rehabilitate, purchase, or lease buses and bus related equipment and to rehabilitate, purchase, construct, or lease bus-related facilities
 - Received \$3.1 billion from the IIJA
 - Charlotte received \$1.9 million in FY 23
- **Urbanized Area Formula Grants**
 - Funding for transit capital and operating assistance and transportation-related planning in urbanized areas
 - Charlotte received \$28 million in FY 23
- **State of Good Repair**
 - Funding for repairs and upgrading of rail and bus rapid transit systems
 - Charlotte received \$3.6 million in FY 23

Competitive Grants

- **RAISE Grant Program - \$7.5 billion***
 - Closes February 28, 2024; Awards announced by June 27 (\$1.5b in current round)
 - Non-Federal cost share of 20 percent
- **Bus and Bus Facilities - \$2.34 billion***
 - Closes April 25, 2024 (\$390m in current round)
- **Low-No Emission Buses - \$5.5 billion***
 - Closes April 25, 2024 (\$1.1b available in current round)
 - Federal share may exceed 80 percent for certain projects:
 - Leasing or purchasing a low or no emission transit bus: 85 percent federal share
 - Leasing or acquiring low- or no-emission bus-related equipment and facilities: 90 percent federal share
- **Capital Investment Grants – \$8 billion***
 - \$4.2 billion in FY 23 (\$1.6b Advance Appropriations and \$2.4b in General Fund and \$200+ M in recovered monies)
 - Match: New Starts: 60 percent, Small Starts: 80 percent, and Core Capacity: 80 percent

*Mandatory funding from IIJA/IRA

Competitive Grants

- EPA Climate Pollution Reduction Grant – \$5 billion*
 - Notice of Intent due on February 1, 2024. Applications due April 1, 2024
 - No cost sharing/matching funds are required as a condition of eligibility under this competition. Funds awarded under this program cannot be used to meet the matching funds requirement under another federal grant program
- Safe Streets and Roads for All - \$5 billion*
 - First deadline: April 4, 2024 (\$1.2b in current round)
 - Non-Federal cost share of 20 percent
- SMART Grant Program - \$500 million*
 - Closed. Next round expected in Spring 2024
- Pilot Program for Transit Oriented Development - \$68 million*
 - Closed. Next round expected in Spring 2024
 - Non-Federal cost share of 20 percent depending on project location

*Mandatory funding from IIJA/IRA

Competitive Grants

- Reconnecting Communities Program/Neighborhood Access (IIJA/IRA) - \$3.7 billion*
 - Closed. Next round expected Summer 2024
 - Community Planning Grants: Non-Federal cost share of 20 percent
 - Capital Grants: Non-RCP cost share of 50 percent
 - Neighborhood Access Program: Non-federal cost share of 20 percent
- EV Charging and Refueling Grant Program - \$2.5 billion*
 - Closed
 - Non-Federal cost share of 20 percent
- ATTAIN Grant Program - \$900 million*
 - Closed
 - Non-Federal cost share of 20 percent

*Mandatory funding from IIJA/IRA

Questions



February 2024 Meeting – Summary of Monthly Statistics & Information

Safety Summary

- The month of January saw several preventable incidents within the bus division, highlighting areas for safety improvements.
- Additionally, the rail division reported an incident involving the Gold Line and its equipment, though it was fortunate that no major injuries were reported.

Ridership Summary

- Bus Service Missed Trips Highlights
 - January saw missed trips fall to the lowest level in the past two years, marking a significant improvement in service reliability.
- Ridership Highlights
 - January witnessed a notable increase in ridership across various service types:
 - Express Routes saw a 14.4% rise, indicating a strong preference for faster travel options.
 - Regional Express Routes also experienced a healthy increase of 11.8%, reflecting a growing demand for broader area connectivity.
 - Local Routes saw a 4.5% uptick, showcasing steady community reliance on these services.
 - Overall, rail ridership surged by 18.9%, with specific lines showing varied trends:
 - The Blue Line recorded a 23.5% increase.
 - The Gold Line saw a 14.5% decrease
 - The total system ridership rose by 9.3%, affirming an upward trajectory in public transportation use across the board.

Communications Summary

- A comprehensive email was issued concerning disruptions to the CATS phone systems, which impacted numerous city call centers. The Information & Technology team successfully implemented a solution, restoring phone service to full functionality.

Bus Operations Division Safety Performance Measures

Fatality Incidents Goal: 0 per 100k mi

CY 2023	Incidents	Bus Revenue Miles	Rate
Q1 Jan - Mar	0	2,706,290	0.00
Q2 Apr - Jun	0	2,686,141	0.00
Q3 Jul - Sep	1	2,695,556	0.04
Q4 Oct - Dec	0	2,734,556	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Total NTD Major Reportable Injuries (Employee & Customer) Goal: < 1 per 100k mi

CY 2023	Employee Injuries	Customer Injuries	Bus Revenue Miles	Rate
Q1 Jan - Mar	3	5	2,706,290	0.30
Q2 Apr - Jun	1	23	2,686,141	0.89
Q3 Jul - Sep	3	13	2,695,556	0.59
Q4 Oct - Dec	3	16	2,734,556	0.69

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Preventable Collisions w/ Damage ≥ \$500 Goal: 0.5 per 100k mi

CY 2023	Incidents	Bus Revenue Miles	Rate
Q1 Jan - Mar	15	2,706,290	0.55
Q2 Apr - Jun	6	2,686,141	0.22
Q3 Jul - Sep	9	2,695,556	0.33
Q4 Oct - Dec	36	2,734,556	1.32

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

System Reliability Goal: < 10 per 100k mi

CY 2023	Incidents	Bus Revenue Miles	Rate
Q1 Jan - Mar	307	2,706,290	11.34
Q2 Apr - Jun	311	2,686,141	11.58
Q3 Jul - Sep	312	2,695,556	11.57
Q4 Oct - Dec	256	2,734,556	9.36

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Please note: This is an updated report of the 4th quarter data provided in the January 24th agenda packet.

Special Transportation Service Safety Performance Measures

Fatality Incidents Goal: 0 per 100k mi

CY 2023	Incidents	STS Revenue Miles	Rate
Q1 Jan - Mar	0	520,171	0.00
Q2 Apr - Jun	0	495,328	0.00
Q3 Jul - Sep	0	511,666	0.00
Q4 Oct - Dec	0	516,003	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Total NTD Major Reportable Injuries (Employee & Customer) Goal: < 1 per 100k mi

CY 2023	Employee Injuries	Customer Injuries	STS Revenue Miles	Rate
Q1 Jan - Mar	0	0	520,171	0.00
Q2 Apr - Jun	0	0	495,328	0.00
Q3 Jul - Sep	0	0	511,666	0.00
Q4 Oct - Dec	1	0	516,003	0.19

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Preventable Collisions w/ Damage ≥ \$500 Goal: 0.5 per 100k mi

CY 2023	Incidents	STS Revenue Miles	Rate
Q1 Jan - Mar	1	520,171	0.19
Q2 Apr - Jun	0	495,328	0.00
Q3 Jul - Sep	2	511,666	0.39
Q4 Oct - Dec	1	516,003	0.19

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

System Reliability Goal: < 3 per 100k mi

CY 2023	Incidents	STS Revenue Miles	Rate
Q1 Jan - Mar	28	520,171	5.38
Q2 Apr - Jun	44	495,328	8.88
Q3 Jul - Sep	36	511,666	7.04
Q4 Oct - Dec	32	516,003	3.72

Rate Formula				
# of incidents	=	x.xx	*	60,000
# of revenue miles				= Rate per 100,000 miles

Please note: This is an updated report of the 4th quarter data provided in the January 24th agenda packet.

Rail Operations Blue Line Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
Q1 Jan - Mar	0	392,297	0.00
Q2 Apr - Jun	0	401,281	0.00
Q3 Jul - Sep	0	399,495	0.00
Q4 Oct - Dec	0	400,430	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Total NTD Major Reportable Injuries (Employee & Customer)

Goal: < 1 per 100k Revenue Car mi

CY 2023	Employee Injuries	Customer Injuries	Total Car Revenue Miles	Rate
Q1 Jan - Mar	0	0	392,297	0.00
Q2 Apr - Jun	0	0	401,281	0.00
Q3 Jul - Sep	0	0	399,495	0.00
Q4 Oct - Dec	0	1	400,430	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Preventable Safety Events (FTA Reportable)

Goal: 0.1 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
Q1 Jan - Mar	0	392,297	0.00
Q2 Apr - Jun	0	401,281	0.00
Q3 Jul - Sep	2	399,495	0.50
Q4 Oct - Dec	0	400,430	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

System Reliability

Goal: < 3 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
Q1 Jan - Mar	1	392,297	0.25
Q2 Apr - Jun	3	401,281	0.75
Q3 Jul - Sep	2	399,495	0.50
Q4 Oct - Dec	4	400,430	1.00

Rate Formula				
# of incidents	=	x.xx	*	3,000
# of revenue miles				= Rate per 100,000 miles

Please note: This is an updated report of the 4th quarter data provided in the January 24th agenda packet.

Rail Operations Gold Line Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
Q1 Jan - Mar	0	34,183	0.00
Q2 Apr - Jun	0	32,846	0.00
Q3 Jul - Sep	0	26,101	0.00
Q4 Oct - Dec	0	22,215	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Total NTD Major Reportable Injuries (Employee & Customer)

Goal: < 1 per 100k Revenue Car mi

CY 2023	Employee Injuries	Customer Injuries	Total Car Revenue Miles	Rate
Q1 Jan - Mar	0	0	34,183	0.00
Q2 Apr - Jun	0	0	32,846	0.00
Q3 Jul - Sep	0	0	26,101	0.00
Q4 Oct - Dec	0	0	22,215	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Preventable Safety Events (FTA Reportable)

Goal: 0.1 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
Q1 Jan - Mar	1	34,183	2.93
Q2 Apr - Jun	0	32,846	0.00
Q3 Jul - Sep	0	26,101	0.00
Q4 Oct - Dec	0	22,215	0.00

Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

System Reliability

Goal: < 3 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
Q1 Jan - Mar	0	34,183	0.00
Q2 Apr - Jun	2	32,846	6.09
Q3 Jul - Sep	0	26,101	0.00
Q4 Oct - Dec	0	22,215	0.00

Rate Formula				
# of incidents	=	x.xx	*	3,000
# of revenue miles				= Rate per 100,000 miles

Please note: This is an updated report of the 4th quarter data provided in the January 24th agenda packet.

Bus Operations Division Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k mi

CY 2024	Incidents	Bus Revenue Miles	Rate
January	0	933,933	0.00
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per
# of revenue miles						100,000 miles

Total NTD Major Reportable Injuries (Employee & Customer)

Goal: < 1 per 100k mi

CY 2024	Employee Injuries	Customer Injuries	Bus Revenue Miles	Rate
January	0	0	933,933	0.00
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per
# of revenue miles						100,000 miles

Preventable Collisions w/ Damage ≥ \$500

Goal: 0.5 per 100k mi

CY 2024	Incidents	Bus Revenue Miles	Rate
January	3	933,933	0.32
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per
# of revenue miles						100,000 miles

System Reliability

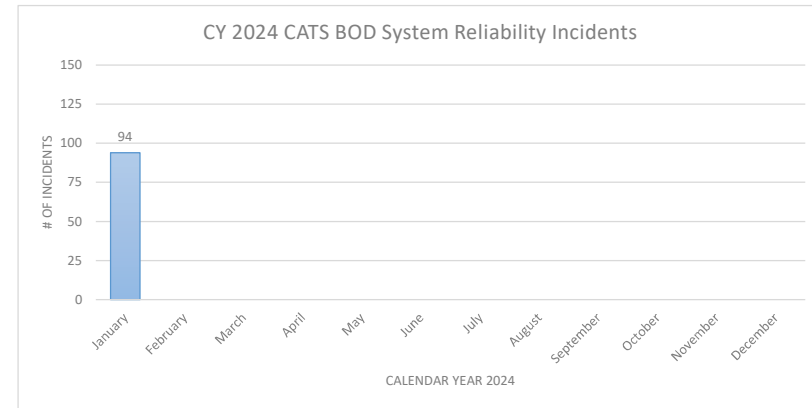
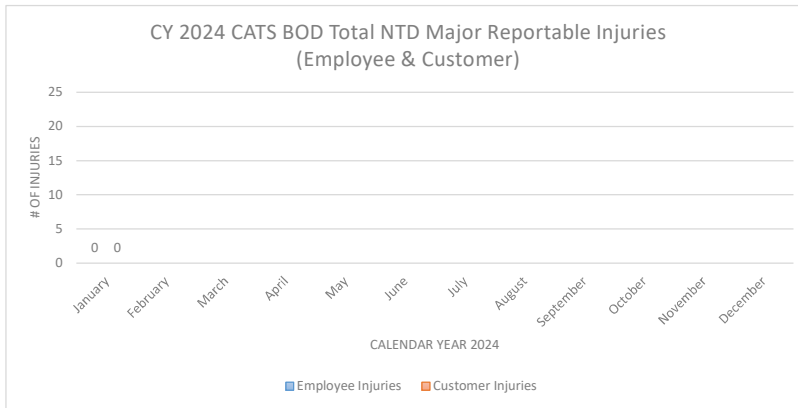
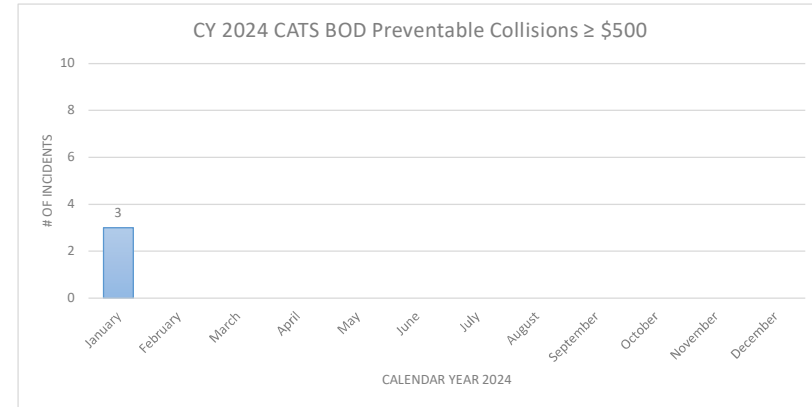
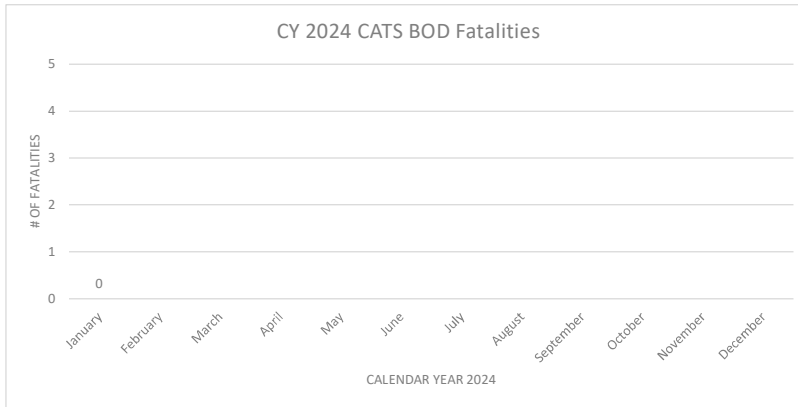
Goal: < 10 per 100k mi

CY 2024	Incidents	Bus Revenue Miles	Rate
January	94	933,933	10.06
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per
# of revenue miles						100,000 miles

Bus Operations Division Safety Performance Measures



Special Transportation Service Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k mi

CY 2024	Incidents	STS Revenue Miles	Rate
January	0	175,972	0.00
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

Total NTD Major Reportable Injuries (Employee & Customer)

Goal: < 1 per 100k mi

CY 2024	Employee Injuries	Customer Injuries	STS Revenue Miles	Rate
January	0	0	175,972	0.00
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

Preventable Collisions w/ Damage ≥ \$500

Goal: 0.3 per 100k mi

CY 2024	Incidents	STS Revenue Miles	Rate
January	1	175,972	0.57
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

System Reliability

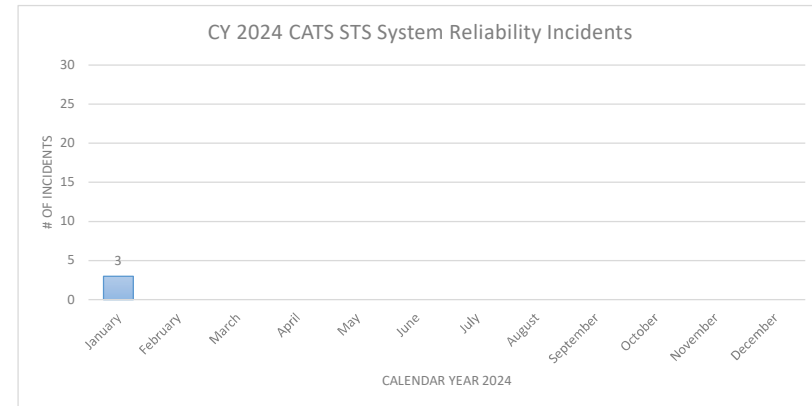
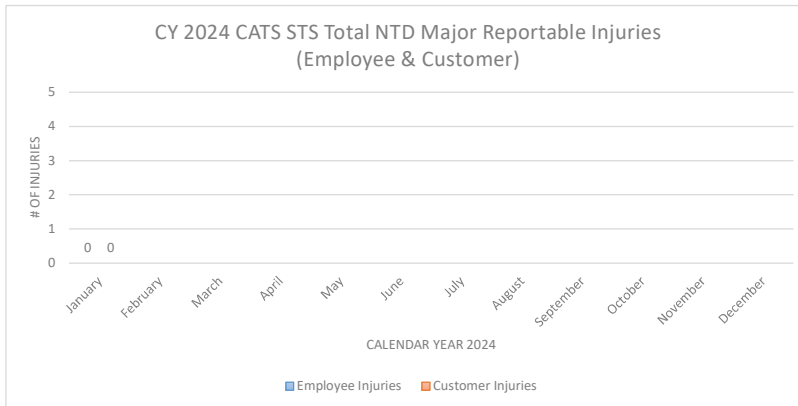
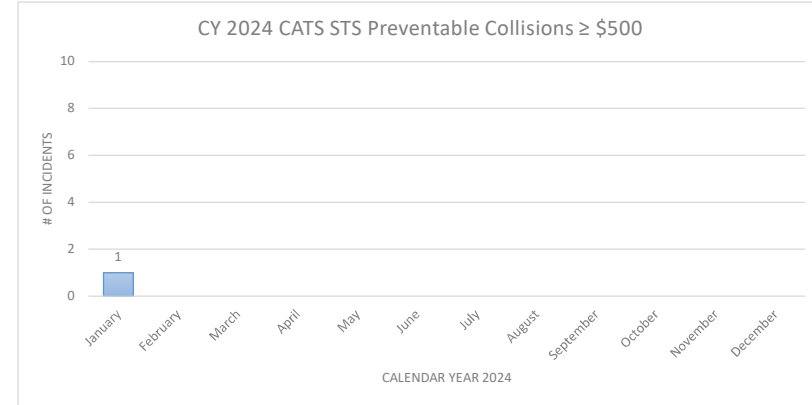
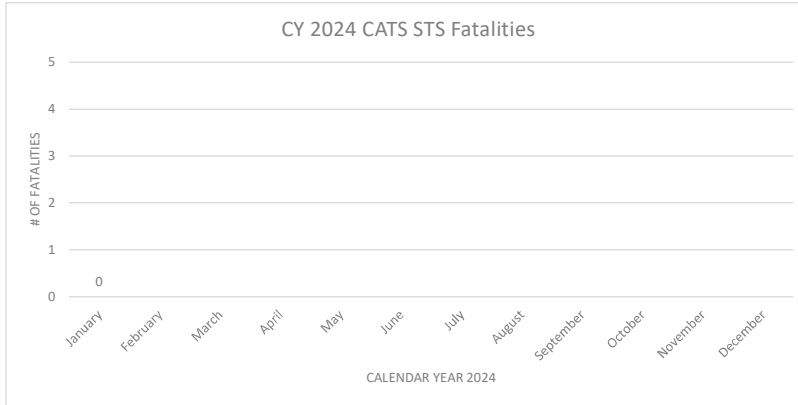
Goal: < 3 per 100k mi

CY 2024	Incidents	STS Revenue Miles	Rate
January	3	175,972	1.70
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

Special Transportation Service Safety Performance Measures



Rail Operations Blue Line Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k Revenue Car mi

CY 2024	Incidents	Total Car Revenue Miles	Rate
January	0	137,328	0.00
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula					
# of incidents	=	x.xx	*	100,000	=
# of revenue miles					Rate per 100,000 miles

Total NTD Major Reportable Injuries (Employee & Customer)

Goal: < 1 per 100k Revenue Car mi

CY 2024	Employee Injuries	Customer Injuries	Total Car Revenue Miles	Rate
January	0	0	137,328	0.00
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Rate Formula					
# of incidents	=	x.xx	*	100,000	=
# of revenue miles					Rate per 100,000 miles

Preventable Safety Events (FTA Reportable)

Goal: 0.1 per Revenue Car 100k mi

CY 2024	Incidents	Total Car Revenue Miles	Rate
January	0	137,328	0.00
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula					
# of incidents	=	x.xx	*	100,000	=
# of revenue miles					Rate per 100,000 miles

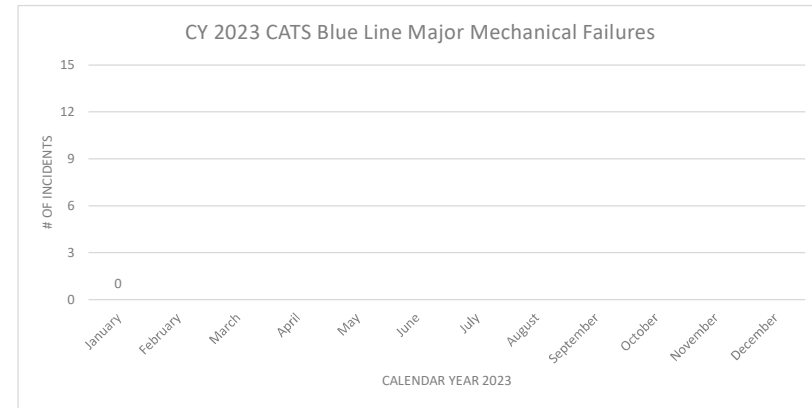
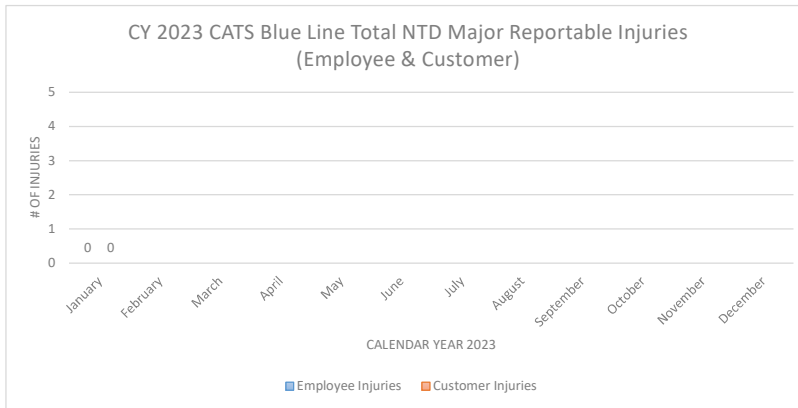
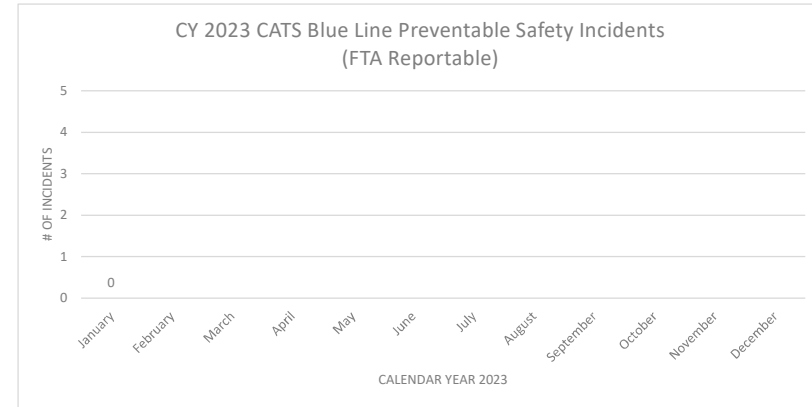
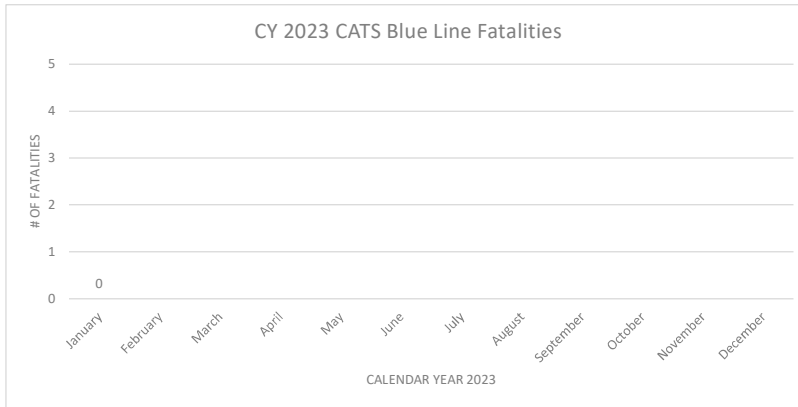
System Reliability (Major Mechanical Failures)

Goal: < 3 per 100k Revenue Car mi

CY 2024	Incidents	Total Car Revenue Miles	Rate
January	0	137,328	0.00
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula					
# of incidents	=	x.xx	*	100,000	=
# of revenue miles					Rate per 100,000 miles

Rail Operations Blue Line Safety Performance Measures



Rail Operations Gold Line Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	0	7,367	0.00
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

Total NTD Major Reportable Injuries (Employee & Customer)

Goal: < 1 per 100k Revenue Car mi

CY 2023	Employee Injuries	Customer Injuries	Total Car Revenue Miles	Rate
January	0	0	7,367	0.00
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

Preventable Safety Events (FTA Reportable)

Goal: 0.1 per Revenue Car 100k mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	1	7,367	13.57
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

System Reliability (Major Mechanical Failures)

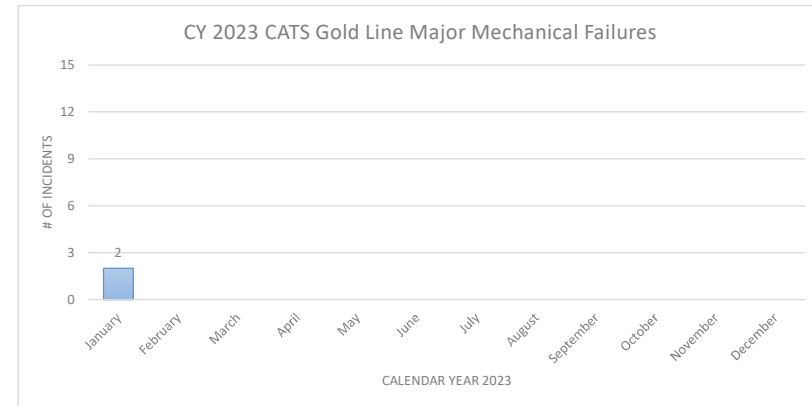
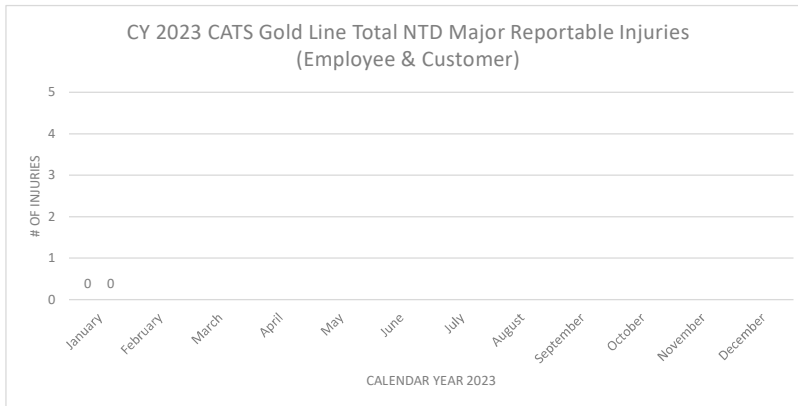
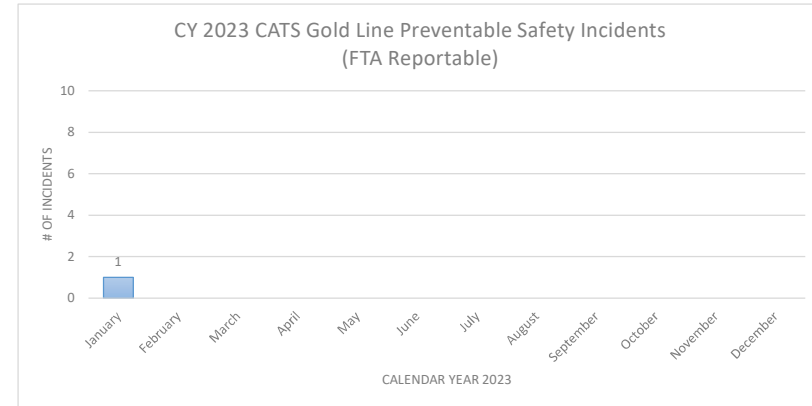
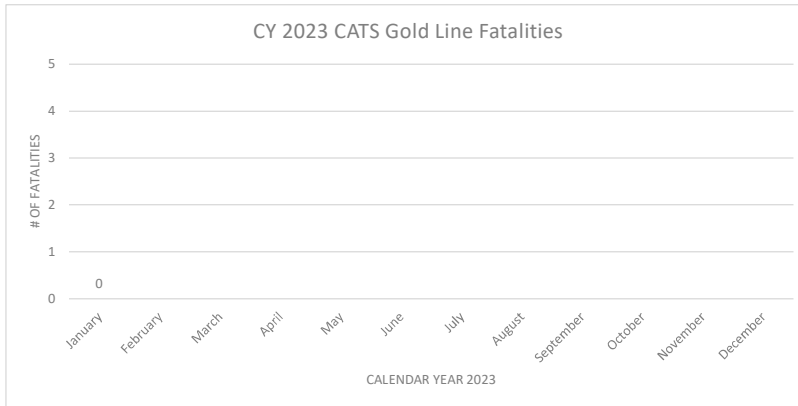
Goal: < 3 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	2	7,367	0.81
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			

Rate Formula

# of incidents	=	x.xx	*	100,000	=	Rate per 100,000 miles
# of revenue miles						

Rail Operations Gold Line Safety Performance Measures



Metropolitan Transit Commission
Charlotte Area Transit System Ridership Report
Jan-24

Mode / Service	Jan-24	Jan-23	Percent Increase/Decrease	YTD FY 2024	YTD FY 2023	Percent Increase/Decrease	Avg Daily Ridership per Month		
							WeekDay	Saturday	Sunday
Local									
BOD Local	534,498	464,273	15.1 %	3,977,324	3,131,321	27.0 %	19,869	13,457	10,005
Subtotal	534,498	464,273	15.1 %	3,977,324	3,131,321	27.0 %	19,869	13,457	10,005
Local Express									
Arboretum Express	994	486	104.5 %	6,999	738	848.4 %	47	-	-
Harrisburg Road Express	1,188	705	68.5 %	7,750	6,047	28.2 %	57	-	-
Northcross Express	2,975	2,802	6.2 %	18,373	16,041	14.5 %	142	-	-
Idlewild Road Express	625	741	-15.7 %	5,261	4,921	6.9 %	30	-	-
Independence Blvd Express	2,151	1,766	21.8 %	13,500	10,734	25.8 %	102	-	-
Lawyers Road Express	1,197	849	41.0 %	8,350	5,615	48.7 %	57	-	-
Mountain Island Express	226	82	175.6 %	1,514	174	770.1 %	11	-	-
Northlake Express	2,116	1,458	45.1 %	13,474	9,348	44.1 %	101	-	-
North Mecklenburg Express	4,768	3,558	34.0 %	27,006	21,039	28.4 %	227	-	-
Huntersville Express	3,135	2,938	6.7 %	20,773	16,616	25.0 %	149	-	-
Rea Road Express	1,213	990	22.5 %	8,361	6,948	20.3 %	58	-	-
Steele Creek Express	509	159	220.1 %	2,932	260	1,027.7 %	24	-	-
Huntersville Greenhouse Express	44	105	-58.1 %	1,065	814	30.8 %	2	-	-
Subtotal	21,141	16,639	27.1 %	135,358	99,295	36.3 %	1,007	-	-
Regional Express									
Gastonia Express	964	712	35.4 %	6,346	4,574	38.7 %	46	-	-
Rock Hill Express	1,164	590	97.3 %	6,676	4,374	52.6 %	55	-	-
Union County Express	853	654	30.4 %	5,298	4,510	17.5 %	41	-	-
Subtotal	2,981	1,956	52.4 %	18,320	13,458	36.1 %	142	-	-
Community Circulator									
Neighborhood Shuttles	15,786	17,283	-8.7 %	120,759	99,260	21.7 %	614	370	206
Eastland Neighborhood Shuttle	7,472	8,608	-13.2 %	64,678	57,360	12.8 %	262	235	158
Pineville-Matthews Road	1,444	1,845	-21.7 %	15,092	11,216	34.6 %	58	46	-
Village Rider	4,143	3,569	16.1 %	32,399	26,819	20.8 %	155	111	67
Subtotal	28,845	31,305	-7.9 %	232,928	194,655	19.7 %	1,089	762	431
Human Services Transportation									
Special Transportation Services	14,963	15,893	-5.9 %	105,796	106,587	-0.7 %	581	212	191
DSS	-	1,410	n/a	5,589	5,574	0.3 %	-	-	-
Subtotal	14,963	17,303	-13.5 %	111,385	112,161	-0.7 %	581	212	191
Rideshare Services									
Vanpool	3,680	4,033	-8.8 %	24,872	26,348	-5.6 %	147	35	42
Subtotal	3,680	4,033	-8.8 %	24,872	26,348	-5.6 %	147	35	42



Metropolitan Transit Commission
Charlotte Area Transit System Ridership Report

Jan-24

Mode / Service	Jan-24	Jan-23	Percent Increase/Decrease	YTD FY 2024	YTD FY 2023	Percent Increase/Decrease	Avg Daily Ridership per Month		
							WeekDay	Saturday	Sunday
Rail									
LYNX Blue Line	424,896	397,855	6.8 %	3,356,289	2,933,032	14.4 %	14,866	14,205	9,426
CityLynx Gold Line	43,773	51,217	-14.5 %	319,624	341,468	-6.4 %	1,650	1,058	886
Subtotal	468,669	449,072	4.4 %	3,675,913	3,274,500	12.3 %	16,516	15,263	10,312
Total	1,074,777	984,581	9.2 %	8,176,100	6,851,738	19.3 %	39,351	29,729	20,981



Metropolitan Transit Commission
Charlotte Area Transit System Ridership Report
Jan-24

Source:

Fixed Route Bus - Automatic Passenger Counts

Rail - Automatic Passenger Counts

Mode / Service	Jan-24	Jan-23	Percent Increase / Decrease	Average Daily Ridership		
				Weekday	Saturday	Sunday
Local						
BOD Local	685,501	655,778	4.5%	26,605	14,569	13,084
Subtotal	685,501	655,778	4.5%	26,605	14,569	13,084
Local Express						
Arboretum Express	1,044	733	42%	52	-	-
Harrisburg Road Express	1,328	1,024	29.6%	66	-	-
Northcross Express	4,079	3,479	17.2%	204	-	-
Idlewild Express	893	878	1.6%	45	-	-
Independence Blvd Express	2,828	2,401	17.7%	141	-	-
Lawyers Road Express	1,518	1,208	25.6%	76	-	-
Steele Creek Express	748	342	119%	37	-	-
Northlake Express	2,845	2,503	13.6%	142	-	-
North Mecklenburg Express	6,142	5,417	13.4%	307	-	-
Huntersville Express	4,113	4,221	-2.6%	206	-	-
Rea Road Express	1,360	1,326	2.6%	68	-	-
Mountain Island Express	398	318	25%	20	-	-
Huntersville Greenhouse	139	127	9.6%	7	-	-
Subtotal	27,435	23,979	14.4%	1,372	-	-
Regional Express						
Gastonia Express	1,192	1,157	3.0%	60	-	-
Rock Hill Express	1,249	988	26.5%	62	-	-
Union County Express	1,091	1,013	7.7%	55	-	-

Subtotal	3,533	3,159	11.8%	177	-	-
Community Circulator						
Neighborhood Shuttles	19,062	20,606	-7.5%	766	405	256
Eastland Neighborhood Shuttle	10,919	11,256	-3.0%	404	272	242
Pineville-Matthews Road	2,259	2,508	-9.9%	90	77	-
Village Rider	6,849	6,464	6.0%	254	159	165
Subtotal	39,090	42,065	-7.1%	1,514	1,303	663
Human Services Transportation						
Special Transportation Services	14,963	15,893	-5.9%	531	288	203
Subtotal	14,963	15,893	-5.9%	531	288	203
Rideshare Services						
Vanpool	3,680	4,033	-8.8%	140	35	40
Subtotal	3,680	4,033	-8.8%	140	35	40
Rail						
LYNX Blue Line	454,173	367,727	23.5%	14,866	14,205	9,426
CityLynx Gold Line	43,773	51,217	-14.5%	1,650	1,058	886
Subtotal	497,946	418,944	18.9%	16,516	15,263	10,312
Total	1,272,147	1,163,850	9.3%	46,854	31,459	24,302

January 2024 Missed Trips & Ridership Reports

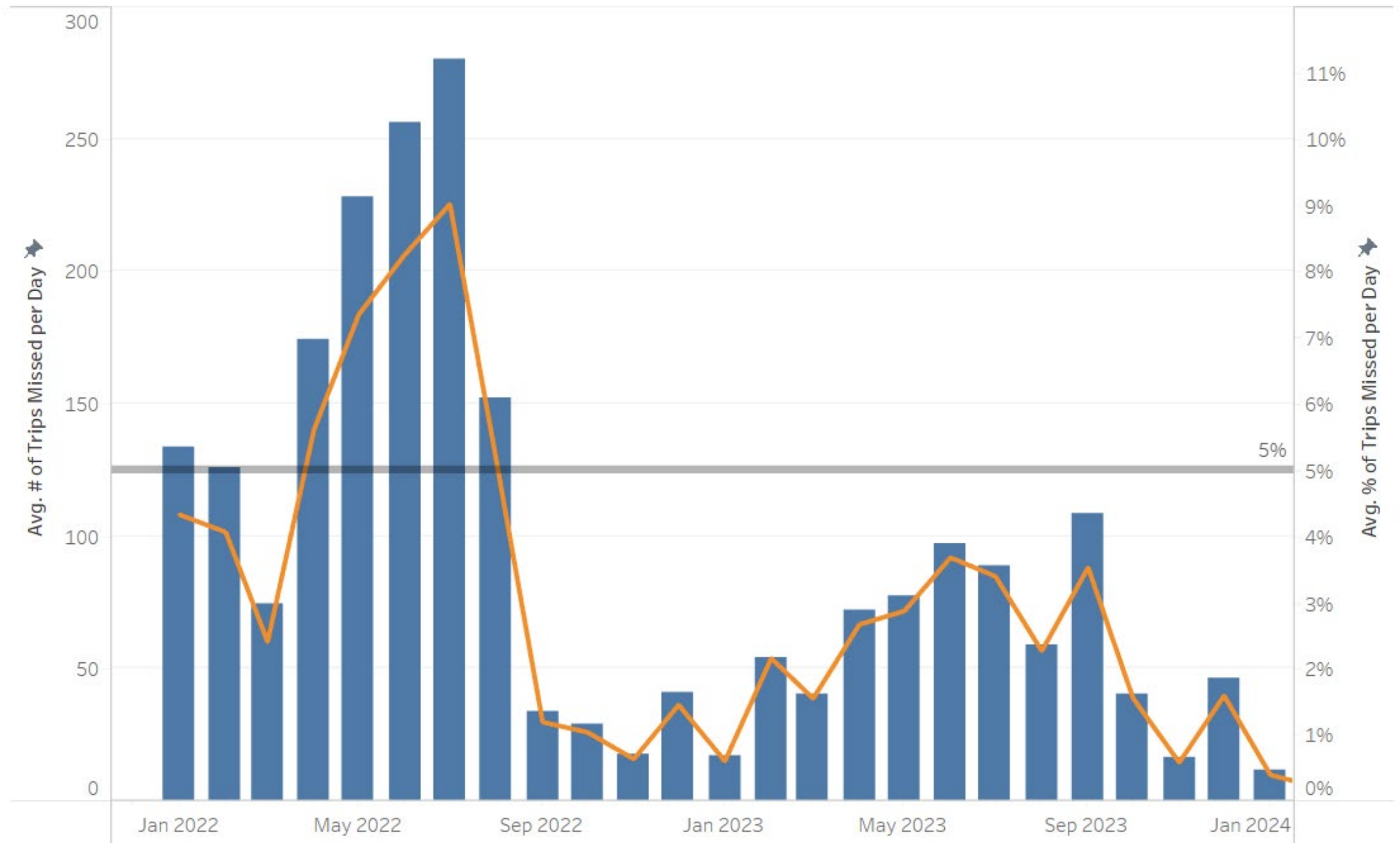
Bus Service Missed Trips Highlights

- January missed trips dropped to the lowest levels experienced in the past 2 years

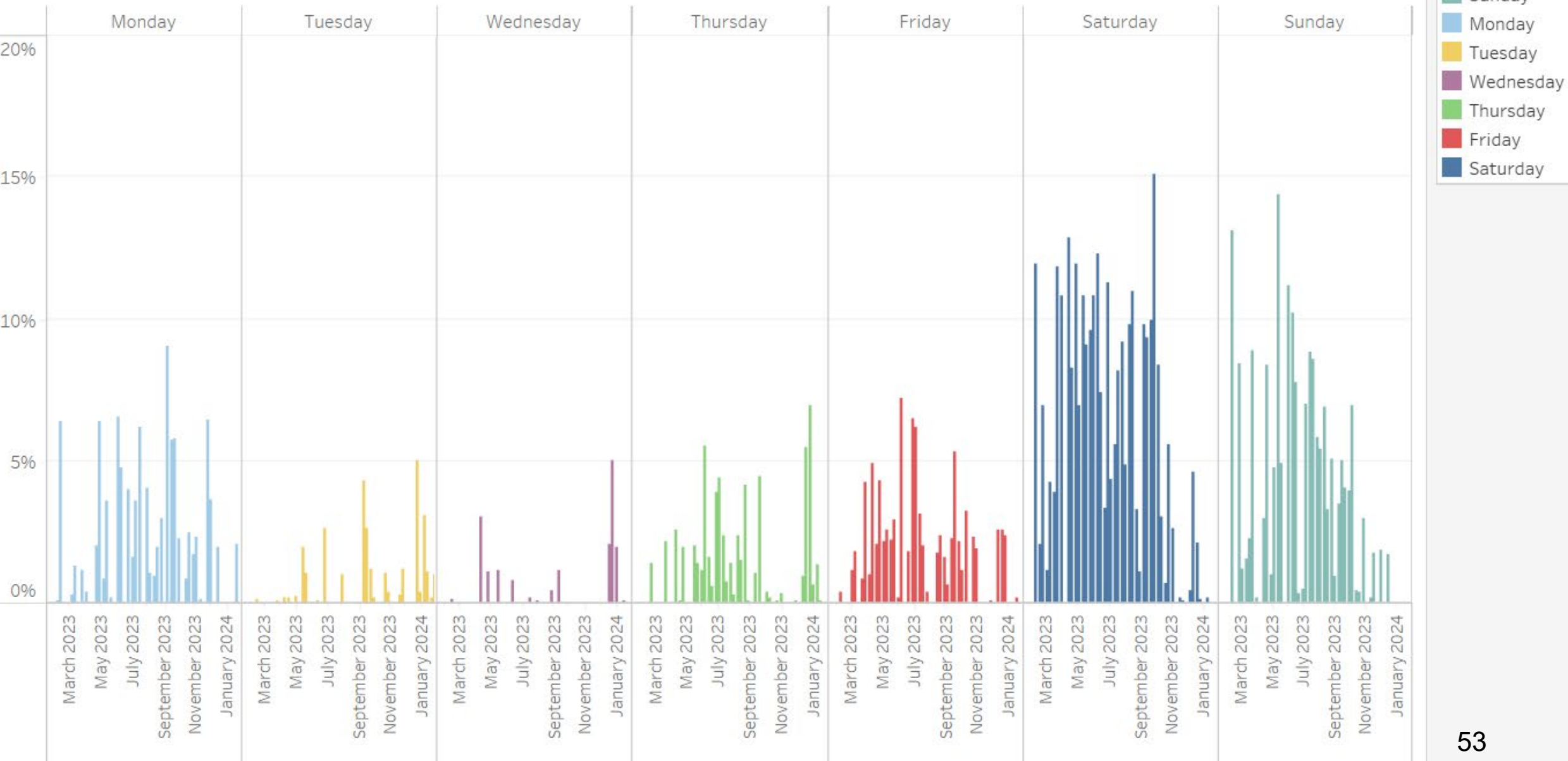
Ridership Highlights

- Express Routes during the month of January saw an increase in ridership of 14.4% , while Regional Express Routes were up 11.8%.
 - Local Routes were up 4.5%
 - Overall Rail ridership increased 18.9%
 - Blue Line ridership increased 23.5%
 - Gold Line ridership decreased 14.5%
 - Total System ridership increased by 9.3%.

Avg Missed Trips per Day



Missed Trips by Day of Week



Subject: Update: CATS Phone System Restored
Date: Sunday, January 28, 2024 at 9:02:56 AM Eastern Standard Time
From: Hunter, Brandon
To: Cagle, Brent
BCC: Lyles, Viola, Altman, Leigh, wtwasham@cornelius.org, rknox@townofdavidson.org, mayorhigdon@matthewsnc.gov, bsimmons@boc.minthill.com, dphillips@pinevillenc.gov, cclark@huntersville.org, Diorio, Dena R., cmud_a grant, jjustice@ci.davidson.nc.us, cmud_a roberts, Becky Hawke, cmud_b welch, rspitzer@pineville.gov, Jones, Marcus, bot-tlathrop1@ncdot.gov, Lawrence, Jason, Goforth, Kelly, Johnson, Victoria, Howell, Chad, Presutti, Elizabeth, CATS PR, Kunze, Emily, Ford, Paulus, Baldeck, Brett, Moskowitz, David, Lanier, Jessica, Gragg, Rachel, Schneider, Jason

UPDATE: CATS Phone System Restored

We wanted to inform you all that our telephone service has been restored and is currently operational at this time.

Thank you,

Brandon T. Hunter (he/him/his)

Director, Communications

Charlotte Area Transit System

From: Hunter, Brandon <Brandon.Hunter@charlottenc.gov>
Date: Friday, January 26, 2024 at 2:27 PM
To: Cagle, Brent <Brent.Cagle@charlottenc.gov>
Subject: CATS Phone System Issues

Good afternoon MTC,

I hope this message finds you well. I'm writing to update you on a significant citywide issue that is currently affecting the CATS Customer Service Call Center and Paratransit Reservation Line.

We are experiencing a disruption due to a vendor network outage. This outage is not isolated to our organization; it is affecting several other organizations and municipalities on the East Coast. Our City I&T department is diligently working with the vendor to rectify this issue as quickly as possible.

I would like to highlight that this outage does not impact the functionality of the CATS-Pass app or our web services. Passengers are still able to utilize the

CATS-Pass App and our website, RideTransit.org along with the automated phone options for their needs.

In order to facilitate bookings for our Paratransit services and to address any other customer inquiries during this time, we have set up an alternative contact method. We are directing customers to reach out to us via email at telltransit@charlottenc.gov. This email address will be actively monitored until 7 PM today, and from 7 AM to 4 PM on both Saturday and Sunday. Additionally, our dedicated CATS staff is also keeping a close eye on our social media channels to assist customers and respond to any questions they may have.

We understand the importance of staying connected and are committed to ensuring continued service to our passengers. We will keep you informed and provide an update as soon as our phone services are fully restored.

Thank you for your understanding and support during this time. If any riders reach out to you please share the above email with them.

Thank you,

Brandon T. Hunter

(he/him/his)

Director, Communications

Charlotte Area Transit System

brandon.hunter@charlottenc.gov

Mobile [\(704\) 621-8343](tel:(704)621-8343)

CATS Media Line [\(980\) 722-0311](tel:(980)722-0311)

Connect with CATS:

[Website](#) | [Facebook](#) | [X](#) | [Instagram](#) | [YouTube](#) | [LinkedIn](#) | [Flickr](#)

Sent from my iPhone

Get [Outlook for iOS](#)

February| CATS Sales Tax Report FY2024

November Receipts

Sales Tax Collections and Distribution – November 2023

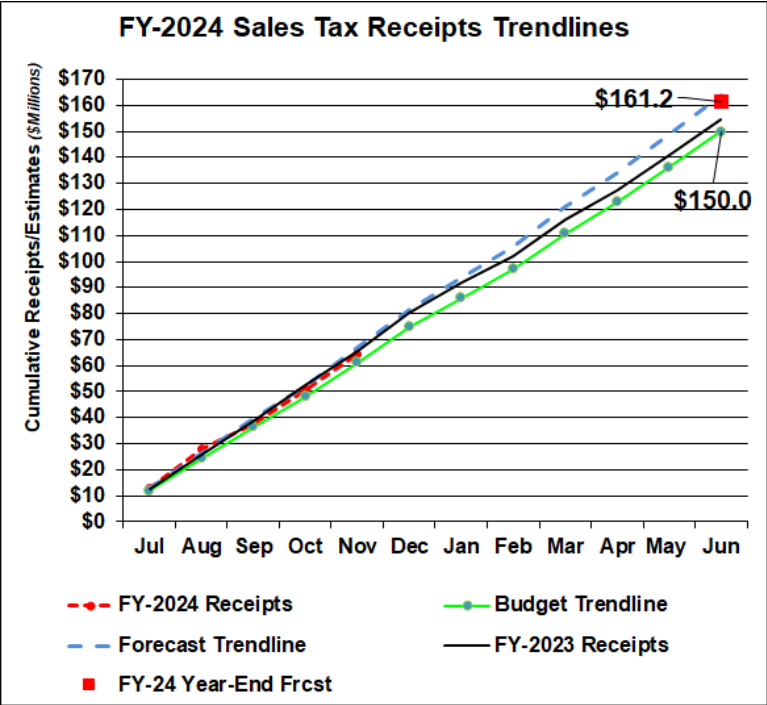
- The November 2023 receipts of \$13,484,481 were \$344,481 (2.6%) above budget target for the month
- The November 2023 receipts were (\$860,019) (-6.0%) below forecast for the month
- The November 2023 receipts were \$332,864 (2.5%) above November of 2022

Sales Tax Budget Data

- FY2024 sales tax budget is \$150,000,000
- The FY24 model forecasts year-end receipts of \$161,233,766 is \$11,233,766 (7.49%) above the FY-2023 budget target of \$150,000,000.
- FY2023 actual sales tax was \$154,638,512

Local Government Sales and Use Tax Distribution

- Source: North Carolina Department of Revenue Sales & Use Distribution Report for the month December 31, 2023
- Published by NC Secretary of Revenue on February 12, 2024 with actual receipts through December 31, 2023
- CATS sales tax report only includes Mecklenburg County Article 43 sales tax



FY2023 Budget Sales Tax Receipts (Actuals and Forecasts)

* Jurisdiction	Population	% of Total	Jul 23 Actuals	Aug 23 Actuals	Sep 23 Actuals	Oct 23 Actuals	Nov 23 Actuals	Dec 23 Forecasts	Jan 24 Forecasts	Feb 24 Forecasts	Mar 24 Forecasts	April 24 Forecasts	May 24 Forecasts	Jun 24 Forecasts	Total
Charlotte	894,866	40.4%	\$ 5,265,617	\$ 5,967,516	\$ 3,941,722	\$ 5,313,842	\$ 5,442,840	\$ 6,021,310	\$ 4,884,466	\$ 4,897,685	\$ 6,008,091	\$ 5,433,059	\$ 5,836,243	\$ 6,067,577	\$ 65,079,968
Cornelius	31,872	1.4%	\$ 187,543	212,542	140,390	189,260	193,855	214,458	173,968	174,438	213,987	193,507	207,867	216,106	2,317,921
Davidson	15,066	0.7%	\$ 88,652	100,469	66,363	89,464	91,636	101,375	82,235	82,458	101,152	91,471	98,259	102,154	1,095,689
Huntersville	63,355	2.9%	\$ 372,797	422,490	279,067	376,211	385,344	426,299	345,812	346,748	425,363	384,651	413,196	429,574	4,607,552
Matthews	30,156	1.4%	\$ 177,445	201,099	132,832	179,071	183,418	202,912	164,601	165,047	202,466	183,088	196,675	204,471	2,193,123
Mint Hill	26,971	1.2%	\$ 158,704	179,859	118,802	160,158	164,046	181,481	147,216	147,615	181,082	163,751	175,903	182,875	1,961,491
Pineville	10,931	0.5%	\$ 64,321	72,895	48,149	64,910	66,486	73,552	59,665	59,826	73,390	66,366	71,291	74,117	794,967
Stallings	393	0.0%	\$ 2,313	2,621	1,731	2,334	2,390	2,644	2,145	2,151	2,639	2,386	2,563	2,665	28,581
Weddington	5	0.0%	\$ 29	33	22	30	30	34	27	27	34	30	33	34	364
Meck. County	1,143,390	51.6%	\$ 6,727,994	7,624,827	5,036,425	6,789,612	6,954,437	7,693,561	6,240,990	6,257,880	7,676,671	6,941,940	7,457,096	7,752,677	83,154,109
Total	2,217,005	100.0%	\$ 13,045,415	\$ 14,784,351	\$ 9,765,503	\$ 13,164,891	\$ 13,484,481	\$ 14,917,625	\$ 12,101,125	\$ 12,133,875	\$ 14,884,875	\$ 13,460,250	\$ 14,459,125	\$ 15,032,250	\$ 161,233,766
YTD Budget															\$ 150,000,000
Variance (YTD)															\$ 11,233,766

*Table is consistent with North Carolina General Statute § 105-507.3. Distribution and Use of Taxes

FY-2023 Budget Sales Taxes Receipts Year-over-Year Comparison

	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	YTD Total
Year-over-Year Comparison (FY2024 over FY2023)	2.8%	14.8%	-27.8%	-0.9%	2.5%	10.5%	18.4%	45.9%	11.5%	18.4%	11.8%	15.2%	15.8%
FY2024 Budget Target	\$ 11,940,000	\$ 12,360,000	\$ 12,150,000	\$ 11,565,000	\$ 13,140,000	\$ 13,665,000	\$ 11,085,000	\$ 11,115,000	\$ 13,635,000	\$ 12,330,000	\$ 13,245,000	\$ 13,770,000	\$ 150,000,000
% of FY2024 Budget Achieved	8.7%	18.6%	25.1%	33.8%	42.8%	52.8%	60.8%	68.9%	78.9%	87.8%	97.5%	107.5%	107.5%

FY2019 - FY2023 Sales Tax Receipts

Fiscal Year	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	Total
FY2023	\$ 12,687,115	\$ 12,882,613	\$ 13,528,146	\$ 13,283,060	\$ 13,151,617	\$ 14,644,501	\$ 11,902,754	\$ 9,995,757	\$ 14,159,184	\$ 11,180,564	\$ 13,440,164	\$ 13,783,037	\$ 154,638,512
FY2022	\$ 11,298,388	\$ 10,659,682	\$ 11,073,183	\$ 11,342,634	\$ 12,115,265	\$ 13,501,568	\$ 10,221,788	\$ 8,315,108	\$ 13,351,825	\$ 11,369,039	\$ 12,932,254	\$ 13,044,834	\$ 139,225,568
FY2021	\$ 8,921,474	\$ 9,466,946	\$ 9,245,058	\$ 9,317,741	\$ 9,964,913	\$ 11,402,907	\$ 9,134,772	\$ 6,785,996	\$ 11,253,531	\$ 10,287,447	\$ 8,942,957	\$ 11,945,450	\$ 116,669,192
FY2020	\$ 9,683,570	\$ 9,787,973	\$ 8,671,558	\$ 9,890,136	\$ 9,858,570	\$ 9,800,116	\$ 8,278,036	\$ 8,276,547	\$ 8,735,473	\$ 7,635,380	\$ 6,997,727	\$ 9,833,896	\$ 107,778,982
FY2019	\$ 7,708,503	\$ 9,621,386	\$ 9,103,726	\$ 8,067,019	\$ 9,425,129	\$ 8,906,774	\$ 8,195,787	\$ 7,918,012	\$ 10,155,891	\$ 9,880,419	\$ 9,435,500	\$ 9,117,052	\$ 107,535,197



Feb-24 Progress Report - Identified Actions from the CATS Oversight and Remediation Report

	Action Item	Steps
Issue 1: Derailment(s)	1.1: Report to NCDOT State Safety Oversight (SSO)	<p>May 21, 2022 Derailment (event took place while in service):</p> <ul style="list-style-type: none"> - CATS followed all NCDOT State Safety Oversight (SSO) notification and reporting requirements. - Investigation and documentation on cause of incident performed and provided to MTC on 4/24/23. <p>May 10, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - CATS followed all NCDOT State Safety Oversight (SSO) notification and reporting requirements. - Investigation is complete, inspection indicates this was not a bearing issue. <p>July 28, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Investigation is ongoing, inspection indicates this was not a bearing issue. <p>August 29, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - a non-revenue train derailed in the LYNX Blue Line's south yard tail track, a section of track designed to enable rail vehicles to transition from one track to another track. The incident impacted regular service by requiring revenue trains to operate on a single track near the incident area. The train was moving at a low speed, less than ten mph, at the time of the incident. Preliminary findings by CATS safety personnel suggest that the derailment was due to operator error. - All appropriate regulatory agencies have been informed. CATS Safety Division is currently conducting an investigation, and once completed, all findings will be reported to the North Carolina Department of Transportation State Safety Oversight Division. <p>MTC notified on August 29, 2023</p>
	1.2: Identify Cause	<p>May 21, 2022 Derailment (event took place while in service):</p> <ul style="list-style-type: none"> - As part of the root cause analysis CATS worked with Siemens (Light Rail Vehicle [LRV] manufacturer) to conduct the analysis. - Upon completion of the analysis CATS provided the results to SSO. <p>May 10, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Investigation is complete, inspection indicates this was not a bearing issue. <p>July 28, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Human error contributing factor.
	1.3: Corrective Actions	<p>May 21, 2022 Derailment (event took place while in service):</p> <ul style="list-style-type: none"> - SSO accepted CATS' Corrective Action Plan(s) (CAPs) on 3/2/23 (letter included as part of the background material). <p>May 10, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Investigation is complete, inspections indicates this was not a bearing issue. <p>July 28, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Currently, under development.
	1.4: Next Steps	<p>May 21, 2022 Derailment (event took place while in service):</p> <ul style="list-style-type: none"> - CATS will continue to work with Siemens to expedite necessary repairs on LRV trucks in order to closeout CAPs and begin to remove operating restrictions associated with CAPs.
		<p>May 10, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Investigation is complete, inspection indicates this was not a bearing issue. <p>July 28, 2023 Derailment (event took place while not in service):</p> <ul style="list-style-type: none"> - Currently, under development.
Issue 2: LYNX Blue Line Maintenance	2.1: Identify Maintenance Need	During investigation of Issue 1, it was determined that CATS failed to timely complete truck overhauls of LRV wheel assemblies.
	2.2: Accelerate Maintenance Program	<p>CATS is working with Siemens to develop a final overhaul schedule.</p> <ul style="list-style-type: none"> - Negotiations with Siemens is ongoing and should be complete within the next 15-30 days. - UPDATE: Negotiations have concluded with Siemens and contract updates are underway.
	2.3: Next Steps	Finalize amendment to current service agreement with Siemens to include all LRVs and accelerate maintenance schedule.
		Request for Council Action for purchase of six sets of dollies - approved.



Feb-24 Progress Report - Identified Actions from the CATS Oversight and Remediation Report

Issue 3: Bridge and Parking Deck Inspections	3.1: Identify Missed	Interim CATS CEO informed of required inspections of bridges and parking garages not performed in 2021.
	3.2: Corrective Actions	Interim CATS CEO reported status to SSO and instructed staff to immediately secure a contractor for the inspections.
		<p>Bridges:</p> <ul style="list-style-type: none"> - Inspection contractor began inspections on 3/20/23. - 32 of 38 bridge inspections completed. - No critical issues have been identified to date. - Right of Entry has been obtained from NCRR, Norfolk Southern, and CSX. Flagging must be coordinated with the railroad's flagging service, RailPros, to inspect the remaining 6 bridges. - Inspections on the six remaining bridges began January 15 and are mostly complete. However, some delays have been experienced due to NS requirements and heavy Amtrak/freight train traffic. We are currently waiting on RailPros for additional flagging availability, which may extend the completion of the remaining work until April. <p>Parking Decks:</p> <ul style="list-style-type: none"> - Inspection field work is complete for all parking decks. - On 4/25/23, CATS closed all elevated portions of the employee-only parking deck at N. Davidson due to cracking noted during the inspection. A warranty claim has been made with the construction company. - No critical issues found at the other decks.
	3.3: Inspections	<ul style="list-style-type: none"> - CATS provides monthly reports to SSO. - CATS will publish final inspection report when completed (estimated within six months of completion of the inspections).
	3.4: Next Steps	
Issue 4: Communication	4.1: Communication Failures	<p>City Council and MTC were not informed of above issues until March 2023.</p> <ul style="list-style-type: none"> - Working Group created, work plan in progress.
	4.2: Leadership Changes	<ul style="list-style-type: none"> - Brent Cagle is serving as interim CEO. - Chad Howell has been hired as CFO and Elizabeth Presutti has been hired as CAO. - Victoria Johnson is supporting overall employee engagement and rail management as a Special Assistant to the CEO. - Craig Fox is supporting facilities and asset management in an interim capacity. - Deltrin Harris is no longer with CATS. - Gary Lee has been promoted to General Manager of Rail Operations & Facilities.
	4.3: Corrective Actions	<p>Interim CATS CEO has conducted extensive staff interviews to understand culture that led to poor performance at CATS and lack of communication with elected officials and the public. These interviews and other steps taken have led to discovery of these previously unreported issues.</p> <ul style="list-style-type: none"> - UPDATE: CATS' Senior Leadership is meeting monthly - Conversation Station - with small groups of employees providing a direct avenue for communication with senior leadership.
	4.4: Next Steps	<p>Formalize notification and communication procedures, promote the existing City hotline, share interview summaries with City Council and the public, implement Manager's strategy.</p> <ul style="list-style-type: none"> - Website development in progress anticipate 3-6 months.
Issue 5: NCDOT Conflicts	5.1: Critical Correspondence from NCDOT	SSO correspondence criticizes CATS and reflects a conflict between the two organizations, however since that time CATS and SSO have come to concurrence on CAPS to address Issue 1 and have renewed intention to work together as partners.
	5.2: Corrective Actions	<p>CATS has increased engagement with SSO.</p> <ul style="list-style-type: none"> - New CATS leadership is working to resolve controversy with SSO.
		<p>Ongoing engagement with SSO.</p> <p>Disclose documents from SSO that are critical of CATS - disclosed publicly during MTC Meeting on 4/24/23.</p>
	5.3: Next Steps	



Feb-24 Progress Report - Identified Actions from the CATS Oversight and Remediation Report

Issue 6: Financial Condition	6.1: Financial Demand from Above Issues	Conducting the necessary maintenance and repairs to CATS trains, as well as the urgent need to modernize the bus fleet, will place financial demands on CATS - however, CATS' adopted FY2024 budget and FY 2024 to FY 2028 capital budgets includes the resources needed to meet these requirements.
	6.2: Financial Requirements	All financial requirements are met.
	6.3: Revenue Projections	Revenue projections are sufficient to meet operating and capital expenditures. - UPDATE: We are awaiting the final FY 2023 revenue accruals from City Finance. Once the ACFR is finalized we'll have the fully audited revenues.
	6.4: Currently Available Revenue	Available cash and annual revenues sufficient to meet operating and capital expenditures.
	6.5: Budget	Presented for approval to MTC and CC - approved. Budget adopted by CC on June 12, 2023. - UPDATE: CATS Finance held our FY 2025 operating and FY 2025 to FY 2029 capital budget kickoff on September 12. We are finalizing our Budget schedule and will align with the requirements in the MTC ILA.
	6.6: Corrective Actions	No known issues. - Debt rating remains AA. - Sufficient financial capacity for repairs and bus fleet renewal.
	6.7: FMO - Full Scope Systems Review	Since July 19th CATS is undergoing this Financial Management focused review. The review is conducted by Saggar & Rosenberg, P.C. and Deva Group, both contractors of the FTA. The preliminary timeline has the reviews completion as October 2023. - UPDATE: Saggar & Rosenberg, P.C. and Deva Group have completed the initial phase of the FMO-FSSR Review. CATS Finance is currently preparing for the next phase of the FMO-FSSR Review which has yet to be scheduled.
	6.8: Next Steps	Continue to monitor financial health of the organization and work with City Finance to develop 5-10 year plan of finance for operating and capital needs. - Continue working with Saggar & Rosenberg, P.C. and Deeva Group to complete the FMO-FSSR.
Issue 7: Other	7.1: Rail Operations Control Center (ROCC) Staffing	NCDOT found ROCC staffing levels to be noncompliant with state staffing recommendations/requirements and sent CATS two letters in May documenting this noncompliance. - CATS immediately implemented staffing policy changes for the ROCC and has implemented mandatory overtime in the ROCC until CATS can reduce the vacancy rate in the ROCC. - Update: CATS staffing is stable at this time, NCDOT letters have been made available to the working group and MTC.
	7.2: Bus Replacements	Roughly 60% of CATS bus fleet will be 12 years of age or over 500,000 miles by end of calendar year; Interim CATS CEO has instructed staff to expediate purchase of new battery electric and hybrid electric buses ASAP. - 15 BEBs and 12 Hybrid buses are on order in the current fiscal year. - FY24 budget will support additional buses with IIJA grant funding that was awarded.
	7.3: Asset Management	- Asset Manager position has been filled by Chris Ingram (internal promotion). -UPDATE: A Request for Proposals was issued for an Enterprise Asset Management System on July 11, 2023. Proposals were due on Oct. 18, 2023. Proposals are currently under evaluation.
	7.4: Employee Engagement and Updates	- DiJulius Group has been hired and will begin developing an employee engagement program for CATS. - Employee pay and retention opportunities are being discussed across the agency, CATS has taken aggressive measures to increase pay across its field units in order to create better recruitment and retention.
	7.5: Bus Incident	In May, there was a shooting between a bus operator and passenger. - Both operator and passenger sustained injuries. - The bus operator is no longer employed by RATP-Dev, the passenger is facing charges. - CATS is increasing de-escalation and customer service training and addressing violence, increasing budget roughly two-fold with two new security contracts.

**METROPOLITAN TRANSIT COMMISSION
INFORMATION ITEM
STAFF SUMMARY**

SUBJECT: Transit System Plan Implementation Strategy

DATE: February 28, 2024

1.0 PURPOSE/SCOPE: The purpose of this item is to provide information regarding the process to develop and for the MTC to approve an implementation plan for the Transit System Plan.

2.0 BACKGROUND/JUSTIFICATION: The 2030 Transit System Plan is currently adopted as part of the region's Comprehensive Transportation Plan, which establishes the future transportation vision for the region. The Transit System Plan is not currently included in the region's Metropolitan Transportation Plan (MTP), which sets transportation priorities and identifies the potential funding sources for projects. To be eligible to receive federal funds, transit projects must be included in the fiscally constrained MTP.

CATS is initiating a process to develop, for MTC approval, a fiscally constrained plan and prioritized implementation schedule for the Transit System Plan (including the 2030 Corridor System Plan and the Envision My Ride plan). This process will include defining goals and objectives, evaluation criteria, financial analysis, public and stakeholder engagement, and a draft and final implementation strategy for the Transit System Plan. This process will kick off with public and stakeholder engagement in March 2024. More information on the process and timeline for the work is attached.

3.0 PROCUREMENT BACKGROUND: This work will be supported through a contract with InfraStrategies, LLC. InfraStrategies specializes in providing strategic planning and financial advisory services.

4.0 POLICY IMPACT: This process will result in an update to the Transit System Plan to include an implementation strategy that outlines the proposed schedule for future projects.

4.0 ECONOMIC IMPACT: N/A

5.0 ALTERNATIVES: N/A

6.0 RECOMMENDATION: N/A

7.0 ATTACHMENT(S):

Attachment A: Presentation: Transit System Plan Implementation Strategy

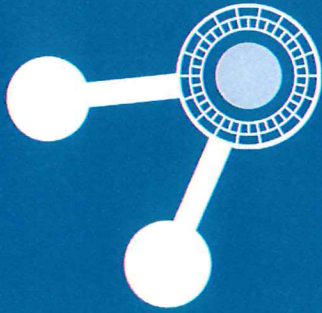
Attachment B: Handout: Process Overview

SUBMITTED AND RECOMMENDED BY:

A handwritten signature in dark ink, reading "Brent Cagle". The signature is written in a cursive, flowing style.

Brent Cagle

**Interim Chief Executive Officer, Charlotte Area Transit System
Assistant City Manager, City of Charlotte**

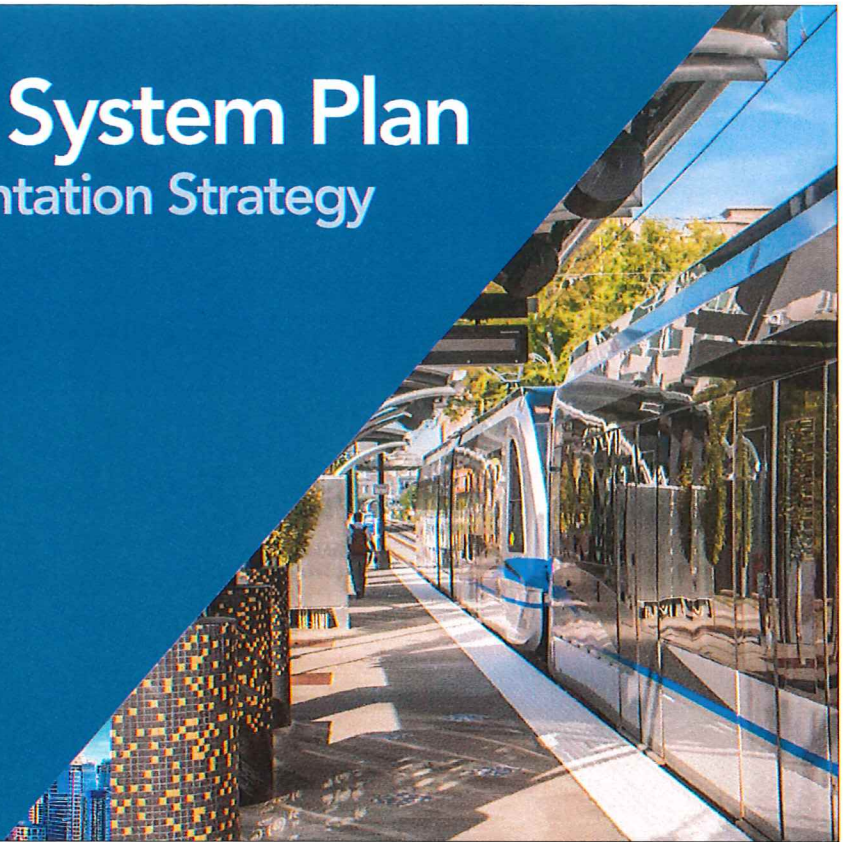


Transit System Plan Implementation Strategy

Overview

Metropolitan Transit Commission (MTC)

February 28, 2024

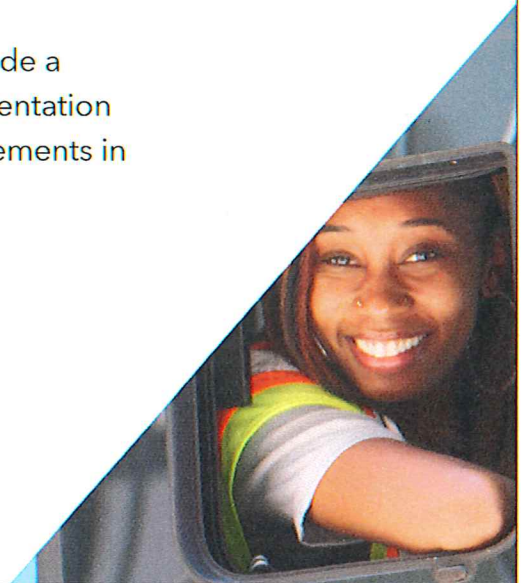


What is the Transit System Plan Implementation Strategy?

The Transit System Plan Implementation Strategy will provide a **fiscally constrained** financial plan and prioritized implementation schedule for an identified program of bus and rail improvements in the Charlotte Area Transit System (CATS) service area.



Transit System Plan
Implementation Strategy



Bus and Rail Improvements

Better Bus

Countywide transformation of existing bus service into premium transit network

Gold Line Extension

6-mile extension of the Gold Line streetcar to Eastland and Rosa Parks Community Transit Centers

Blue Line South Extension

5.5-mile extension of the Blue Line to Pineville and Ballantyne and Blue Line platform expansions

Red Line

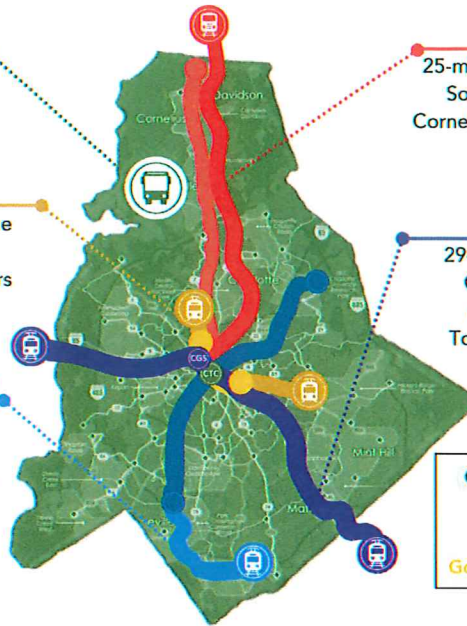
25-mile commuter rail using Norfolk Southern corridor to Huntersville, Cornelius, Davidson, and Mooresville

Silver Line

29-mile light rail connecting Charlotte Gateway Station west to the airport and Gaston County and east to the Town of Matthews and Union County

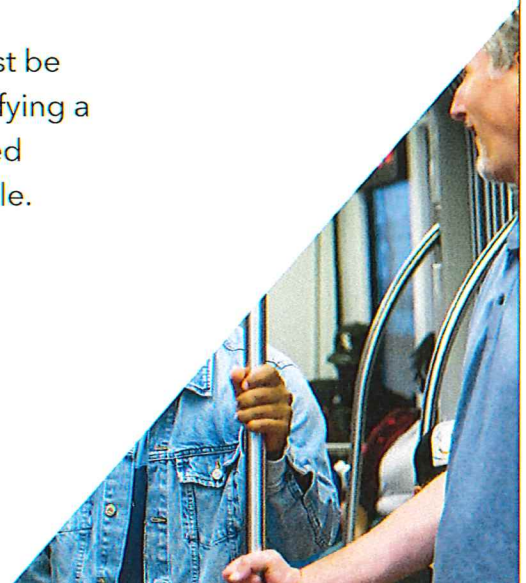
Existing Services

CATS Bus System	Countywide Opened 2000
Blue Line	18.9 miles Opened 2007/2018
MetroRAPID	27.4 miles Opened 2020
Gold Line Streetcar	4.0 miles Opened 2015/2021



Why is the Implementation Strategy needed?

To be eligible to receive federal funds, transit projects must be included in a fiscally constrained plan. This includes identifying a reasonable plan for securing local funding for the identified improvements within an assumed implementation schedule.

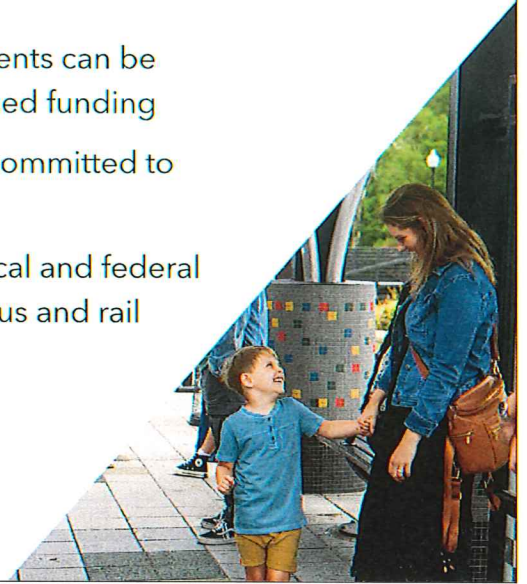


What does the term “fiscally constrained” mean?

- Fiscally constrained means that the identified improvements can be implemented using committed, planned, or future planned funding
- CATS’ existing local funding sources for transit are fully committed to fund existing transit services
- The Implementation Strategy assumes that additional local and federal funding above existing levels will be committed to the bus and rail improvements within a defined delivery period



5



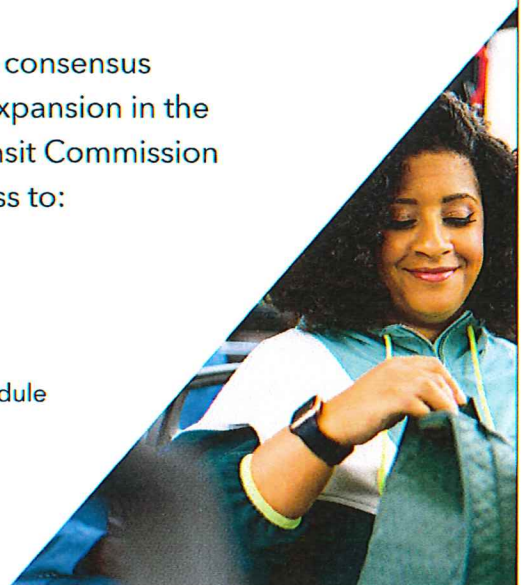
How is the Implementation Strategy Being Developed?

We will follow a transparent and inclusive process to build consensus around the overall goals and objectives for future transit expansion in the CATS service area. We will work with the Metropolitan Transit Commission (MTC), stakeholders, and the public throughout the process to:

- ✓ Confirm and prioritize program goals and objectives
- ✓ Define evaluation criteria based on those goals
- ✓ Evaluate the potential bus and rail improvements
- ✓ Develop a fiscally constrained and prioritized implementation schedule



6



How will we engage the public?

- Public survey to inform implementation strategy development
<https://www.surveymonkey.com/r/TSPimplementation>
- Regular website updates with the latest project information
www.charlottenc.gov/CATS/Transit-Planning/Implementation
- Community meetings and intercept events
- Email at tsp@publicinput.com
- Social media



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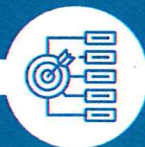


Schedule



Process
Overview

Winter 2024



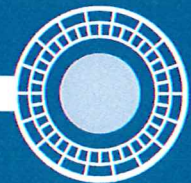
Goals &
Objectives

Spring 2024



Evaluation
Criteria

Summer 2024



Implementation
Strategy

Fall 2024

Public and
Stakeholder
Engagement

Interviews Website Social Media Small Groups
Survey Intercept Events Community Meetings

Metropolitan
Transit Commission
(MTC) Meetings

Process
Overview

Goals &
Objectives

Evaluation
Criteria

MTC
Information

MTC
Action

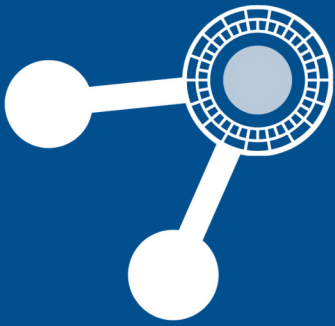


8

Next Steps

- Begin public engagement
- Conduct stakeholder interviews
- Use engagement feedback to confirm goals and objectives
- Present goals and objectives in May





Transit System Plan

Implementation Strategy

Process Overview
February 2024

What is the Transit System Plan Implementation Strategy?

The Transit System Plan Implementation Strategy will provide a fiscally constrained financial plan and prioritized implementation schedule for an identified program of bus and rail improvements in the Charlotte Area Transit System (CATS) service area.

Why is the Implementation Strategy needed?

Like prior CATS transit expansions, any future transit expansion will likely be funded in partnership with the Federal Transit Administration. To be eligible to receive federal funds, transit projects must be included in a fiscally constrained plan. This includes identifying a reasonable plan for securing local funding for the identified improvements within an assumed implementation schedule.

How is the Implementation Strategy being developed?

We will follow a transparent and inclusive process to build consensus around the overall goals and objectives for future transit expansion in the CATS service area. We will work with the Metropolitan Transit Commission (MTC), stakeholders and the public throughout the process to:

- ✓ Confirm and prioritize program goals and objectives
- ✓ Define evaluation criteria based on those goals
- ✓ Evaluate the potential bus and rail improvements
- ✓ Develop a fiscally constrained and prioritized implementation schedule



How can I participate?

Community input is critical to inform the Implementation Strategy. There will be opportunities to provide input throughout the process, including community discussions, conversations with member jurisdictions, organizations, businesses and more.

For project updates, to ask questions or provide comments, please connect with us at

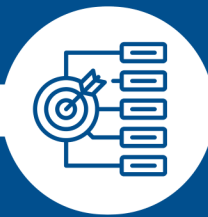
www.charlottenc.gov/CATS/Transit-Planning/Implementation

What is the anticipated schedule?



**Process
Overview**

Winter 2024



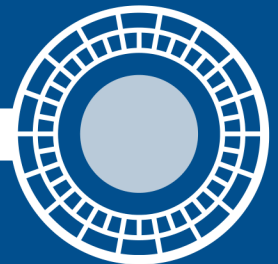
**Goals &
Objectives**

Spring 2024



**Evaluation
Criteria**

Summer 2024



**Implementation
Strategy**

Fall 2024

**Public and
Stakeholder
Engagement**



**Metropolitan
Transit Commission
(MTC) Meetings**

Process
Overview

Goals &
Objectives

Evaluation
Criteria

MTC
Information

MTC
Action



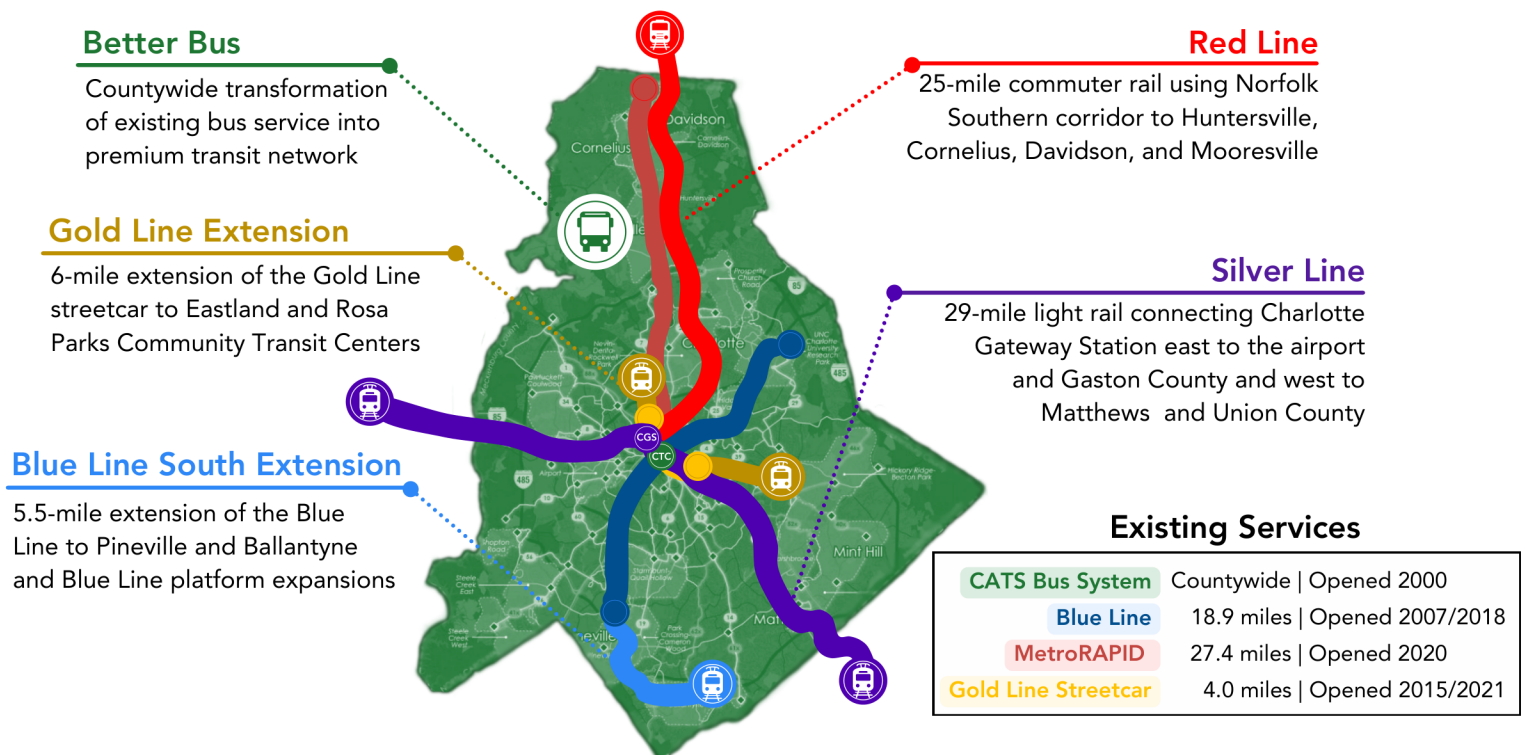
What does “fiscally constrained” mean?

Fiscally constrained means that the identified improvements can be implemented using committed, planned or future planned funding. CATS’ existing local funding sources for transit are fully committed to fund existing transit services. To be considered fiscally constrained, the Implementation Strategy assumes that additional local funding above existing levels will be committed to the bus and rail improvements within a defined delivery period. These local funds would be matched by a combination of federal formula funds, federal competitive grants and other funds.

What transit improvements are being considered?

The Implementation Strategy includes bus and rail improvements from the Envision My Ride: Bus Priority Study and the 2030 Transit Corridor System Plan, adopted by the MTC in 2022 and 2019, respectively. If implemented, the improvements considered in the Implementation Strategy will provide an improved premium bus service network, a total of 115 miles of high capacity transit and other transit enhancements. The following bus and rail improvements are profiled on the following pages in alphabetical order.

MAP TO BE UPDATED





BETTER BUS

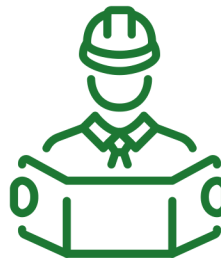


Bus transit has existed in Charlotte since the 1930s, but it wasn't until 2000 with the creation of CATS that the framework of the current bus network took shape. The region's rapid growth over the past decade has caused population and demographic shifts that have changed how residents use the current bus system.

In 2022, the MTC adopted a comprehensive plan of bus improvements detailed in the Envision My Ride: Bus Priority Study. CATS is implementing the plan through the development of the Better Bus program. The Better Bus program will include service frequency and signal improvements, bus shelter and accessibility enhancements, microtransit and other emerging mobility strategies to improve travel time, customer comfort and reliability on our core transit network.

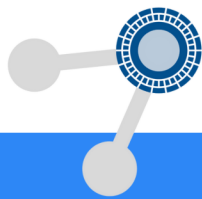


Countywide improvements



Early Implementation Microtransit pilots





BLUE LINE EXTENSION



As the region continues to grow, more mobility options are needed in and around the thriving employment centers south of Charlotte. The **Blue Line Extension to Pineville and Ballantyne** will add 5.5 miles and 5 stations to the current Blue Line. Several existing Blue Line station platforms will be expanded to accommodate current and future ridership demand, alleviate crowding during peak hours and special events and provide system-wide operational benefits.

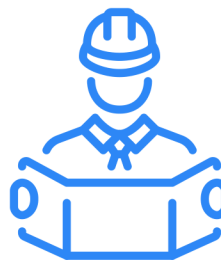
Once complete, the Blue Line will include over 24 miles and 31 stations, providing a one-seat ride from the major employment and commercial centers in Ballantyne and Pineville to dozens of education, hospitals, sports, museum, entertainment and activity centers throughout the region.



5.5
miles



5
stations



Early Planning
completed 2019



GOLD LINE EXTENSION



The commercial and residential areas to the west and east of the existing Gold Line are rapidly expanding. To serve this growth, the **Gold Line Extension** will add 6 miles and 17 stops to the current streetcar line. The west extension will provide streetcar service from French Street along Beatties Ford Road to the Rosa Parks Place Community Transit Center. The east extension will provide streetcar service from Sunnyside Avenue near Novant Health Presbyterian Medical Center to the former Eastland Mall property near North Sharon Amity Road.

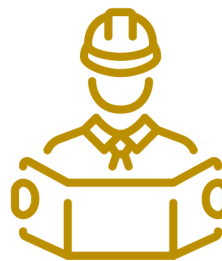
Once complete, the Gold Line will include 10 miles and 34 stops, providing new connections between several of Charlotte's historic and rapidly growing neighborhoods, Charlotte's central business district and the larger transit network.



6
miles

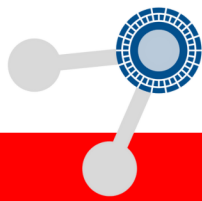


17
stops



30% Design
update anticipated 2025





RED LINE



The **Red Line** is a planned 25-mile commuter rail service along the existing Norfolk Southern O-line corridor. The new service will serve the Downtowns of Huntersville, Cornelius, Davidson and Charlotte. It will also provide the opportunity for expansion into Iredell County serving the key employment hubs and destinations of Lowe's Headquarters and Downtown Mooresville.

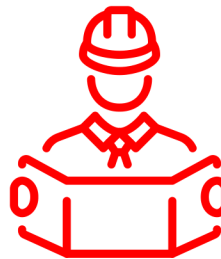
The Red Line will provide a direct connection to the Charlotte Gateway Station and the surrounding entertainment district including the Carolina Panthers, Charlotte Knights and Charlotte Football Club. The Gateway Station would also provide connection to the Silver Line Light Rail, the Gold Line Streetcar, Amtrak and intercity and local bus services.



25
miles

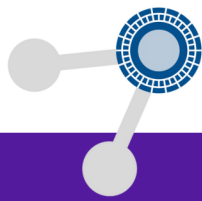


10
stations



< 30% Design
update anticipated 2024





SILVER LINE



The **Silver Line** is a planned 29-mile, 30 station light rail alignment from the City of Belmont in Gaston County, through Center City Charlotte and the Town of Matthews, into Union County. As currently envisioned, the Silver Line would be implemented in multiple phases. Once completed, it would be one of the longest light rail alignments in the country.

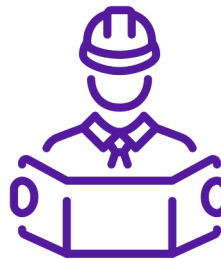
The eastern segment (Phase A) will start at Charlotte Gateway Station (CGS) and extend eastward to the Bank of America Stadium, Matthews, and the Central Piedmont Community College Levine Campus. The western segment (Phase B) will extend westward from CGS to the Charlotte Douglas International Airport and I-485 in western Mecklenburg County. Subsequent extensions could continue farther in each direction into Gaston and Union Counties.



29
miles

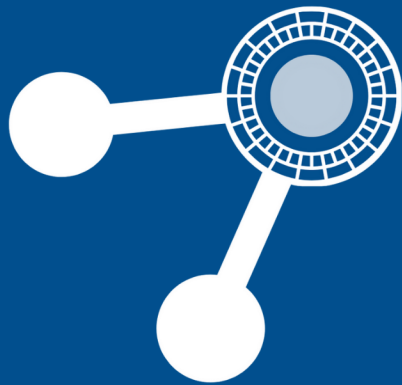


30
stations



30% Design
anticipated 2024





Transit System Plan

Implementation Strategy



