



Metropolitan Transit Commission



January 24, 2024

METROPOLITAN TRANSIT COMMISSION

Wednesday, January 24, 2024

5:30pm

Charlotte-Mecklenburg Government Center

Conference Room 267 - WebEx

AGENDA

- I. Call to OrderCommissioner Leigh Altman
 - Attendance (Introductions)
- II. MTC Appointments
 - Appointment of MTC Vice Chairman.....MTC
 - Appointment of 2024 CRTPO Representative and AlternateMTC
 - Appointment of Advancing the Plan RepresentativeMTC
- III. Approval of the November 15, 2023 Summary (**p.5-17**)Commissioner Leigh Altman
- IV. Public Comments
- V. Transit Work Group Update.....No Report
- VI. Interim Chief Executive Officer's Report..... Brent Cagle
 - Summary of Monthly Statistics (**p.19-20**)
 - Safety Reports (**p.22-29**)
 - Ridership Reports (**p.31-42**)
 - Communications to MTC Board Members (**p. 44-53**)
 - Sales Tax Report (**p.55-56**)
 - Progress Report (**p.58-60**)
- VII. Informational Items
 - FY 2025 Budget Update (**p.62-77**) Chad Howell
- VIII. Action Items
 - None
- 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
November 15, 2023**

Presiding: Mayor Vi Lyles, City of Charlotte

Present:

Commissioner Leigh Altman (MCBOCC)	Brian Welch (Town Manager, Mint Hill)
City Manager Marcus Jones (Charlotte)	Mayor Jack Edwards (Town of Pineville)
Mayor Woody Washam (Town of Cornelius)	Ryan Spitzer (Town Manager, Pineville)
Andrew Grant (Town Manager, Cornelius)	Tony Lathrop, Esq. (NCDOT)
Mayor Rusty Knox (Town of Davidson)	City Councilman Edmund Driggs (Charlotte)
Mayor Melinda Bales (Town of Huntersville)	City Councilman Braxton Winston (Charlotte)
Anthony Roberts (Town Manager, Huntersville)	Mayor Walker Reid III (City of Gastonia)
Mayor John Higdon (Town of Matthews)	Michael Peoples, (City Manager, Gastonia)
Commissioner Renee Gardner (Matthews)	Randi Gates (GCLMPO – Gastonia)
Becky Hawke (Town Manager, Matthews)	Mayor Pro Tem David Scholl (Town of Stallings)

Interim CATS Chief Executive Officer: Brent Cagle

I. Call to Order

The hybrid regular meeting of Metropolitan Transit Commission was called to order at 3:37pm by MTC Chairwoman Mayor Vi Lyles, City of Charlotte.

Discussion:

MAYOR LYLES (City of Charlotte): At the last MTC meeting, the members requested governance review that was completed by the City of Charlotte in 2004 that made recommendations to the amendments. The minutes from that discussion and I wanted to make sure everyone was aware that is enclosed in the materials that were sent to you. If there is any discrepancy from that, please let staff know. We can make sure everybody has that information.

We do not have on the agenda of the discussion of the MTC Interlocal Agreement because there is a recommendation that we have the attorneys meet first, to describe how this would proceed. Their first meeting is Thursday, November 16th, 2023.

I would like to recognize that we have two retiring members that will be recognized today. First being the Mayor of Pineville, Jack Edward, who has made a decision to have another kind of life and chose not to represent or to run for reelection this time. I have to say that Mayor Edwards has been so really helpful and representing the southern towns and the efforts that we have verities always got a pragmatic point of view for us. We wish you well and we will miss you. I know you could weigh in any time because you do know how to use the internet to call in for us. in then,

Mayor Melinda Bales who will have other opportunities to serve publicly and we wish her very well. Thank the people of Huntersville for allowing her to represent them, especially in this effort as we try to build an adequate and successful public transportation system.

MAYOR EDWARDS (Town of Pineville): It has been a wonderful ten years. I have enjoyed everything. It's not that I dislike my job, it's I dislike politics and as we move through, I

see more and more of it rather than sitting down and trying to work things through. It was just time. I retired from the military. I retired from the corporate world. Now I'm retiring from being a servant of the Town of Pineville. I have loved it. I've loved the entire ten years, but it's time. Everybody needs to understand when it's time to go and not overstay your welcome. It has been great. I got to meet some really great people and work with them so many of them. It has been interesting. very interesting. I wish everybody well. I would like to say don't allow this thing to die on the vine. Work it through together in keep attorneys out of it, and I think will be a lot better off.

II. Review of Meeting Summary

The meeting summary of October 25, 2023 was approved.

III. Public Comments - None

IV. Transit Work Group Update

Discussion:

MAYOR HIGDON (Town of Matthews): We had the opportunity, those of us on the workgroup to visit CATS on South Boulevard as well as Tryon Street location. Councilman Ed Driggs and I participated from the working group. Also in attendance was Brent Cagle, Elizabeth Presutti and Emily Kunze.

It was an excellent meeting. We spent about a little over three hours and had the opportunity to meet with CATS employees and have them give unfiltered, uncensored responses to our questions about how things were going. When asked about a lot of the hot topic items, like working and silos with the previous administration and not working together. We asked them about compensation; If they felt valued; If there we're any issues? I had a very robust conversation for about an hour and enjoyed lunch with them. Overall, I would say that the general opinion shared was that things are much better now than they were under the previous administration. I went away from that feeling a lot better. There are always opportunities for improvement.

Some of the things brought up. An STS operator mentioned how physically taxing their work is. Not only to drive the bus, but sometimes roll very heavy wheelchairs up ramps and things like that. Also, something I didn't realize is they often walk their passengers all the way to their door. If they go shopping, they carry their bags and things like that. It's a lot more than you might think. We also talked about crime and safety. All the things that we have done there.

Overall, it was a very positive conversation. I did encourage the employees to contact us directly, MTC, if they had issues going forward. They said they would do that.

We also got to tour the ROCC (Rail Operations Control Center), that we have heard about. I thought that was good. We hear these terms, but to go there, it was surprising neither Councilman Driggs nor myself had ever been to that facility. I've been an elected official for ten years and I think Councilman Driggs about the same, and it was unusual that we hadn't done that up to this point.

We also got to go to the Light Rail and Bus maintenance areas. Those of you know me know I spent majority of my career in manufacturing, and I was really impressed with how clean and orderly both of those facilities are. As someone who was rebuilt a transmission on a truck, I can tell you how quickly you can make a mess. Both of those garages were exceptionally clean and well ordered. You could tell the employees had a lot of pride in working there. That doesn't happen by accident, that happens by good management and good leadership. I was impressed with that.

Some of the statistics mentioned is about a year ago there we're something like a believe 150 buses that were out of commission because they needed parts or it to be repaired and that's down to about 70 now with the goal of no more than 40. That the good metric that things are improving.

Overall, it was a really great day. We had a lot of really good conversation both with some of the union folks, non-union operators, management.

COUNCILMAN DRIGGS (City of Charlotte): That was a great report. I would add that the group of employees that we spoke to represented drivers, maintenance people, supervisors. They were kind of a cross-section of the organization. We urge them to be candid about situations that were still ongoing. There are some, but I think we've gotten back to the realm of kind of an ordinary operation with the ordinary problems that you encounter. It felt to me like the crisis issues in the minds of people we talked to had been addressed. I agree with Mayor Higdon, I was struck by the fact that in the context of a lot of what CATS has been through, the state of their facility, the professional and motivation of the people we talk to. We were taken on tours by some people who shared what they did with pride. One thing I think that came out was inventory management was something that it seemed to me they could modernize, that there might be scope for more investment in managing their supplies, trying to shorten those lead times for ordering parts. They said they've got long wait times for suppliers from some parts. They are constrained also by contracts that don't allow them to buy elsewhere when there is a wait time. We were able to get down into a pretty good level of detail with them. I came away like Mayor Higdon, really impressed with the quality of the work that's being done there in the progress that we have made even though we aren't done yet.

There was an appreciation expressed for Mr Cagle. I think we needed to express that. We really turned a corner when Mr. Cagle came in and the other senior members that have joined since then. The whole environment feels better than it was. We also talked to a couple of people from RAPT Dev who are in a management role. They talked about some of the things they were doing. We didn't get into the issue or the fact that they are going to be leaving soon. Overall, there is work still to be done, no question. there are some things we started that are ongoing like the maintenance program with Siemens, but we were able to look at those trucks, the exact trucks, the one that came off and the other ones and the work that was being done to put those heat strips on. It was a very informative session.

I will say that based on having heard that and because we did that, we have sort of finished the initial checklist of the things that the working group set out to do. We created a repository of documents. All the correspondence with NCDOT was available for inspection. Many of the combined working group members met for hours with the management consultants who had done the earlier work on CATS and got their take on whether or not we were doing the right things to address the concerns and identify whether they felt we were making good progress. I think we got positive feedback from them. One of the items we had intended was that we will do these site visits, which we have now done. I believe that if there we're lurking serious issues involving personnel, that would have come out. It felt to me that we were pretty exhaustive when we talked about safety, race relations and compensation.

I'm going to suggest to the working group that we not schedule automatic monthly meetings, but we also not disband the group because there are things still pending like the FTA report and so on. Mr Cagle would notify us of any occurrence or any emerging document or something like that the group needed to look at. In fact, most of the scheduled work we talked about has been done and there for I think we will meet as needed and the future.

I want to thank CATS. I think everybody went out of their way to make us feel welcome and to show us everything. We were having trouble keeping up with our schedule because they were so eager to talk about what they were doing and share with us. It was a good experience.

MAYOR HIGDON (Town of Matthews): Regarding the trucks, I ran into a buddy of mine I've known for about 30 years. We work together in a previous life. He is now a maintenance manager at CATS. He went over everything that is perishable on a truck set and showed me what all they replaced. I think there being served super conservative even on the heat strips. They don't allow the heat to give above 130 degrees Fahrenheit, which is well below the recommendation of the manufacturer. They are being very careful.

I don't want to obligate CATS staff, but I think everything on the MTC should go visit this facility and have the same experience I did. You can see for yourself and not just take our word for it. It was really eye-opening.

Again, for me sitting on this board for four or five years and to have never had that experience. We throw around all these acronyms and talk about different things that have been worked on but to see them and touch them in be there, it was really eye-opening. It was a great experience. I also want to thank CATS because we had a really good visit.

COMMISSIONER ALTMAN (Mecklenburg County): That sounds amazing. I think it was ringing a bell. I had on my calendar, CATS Facility Tour for later this month. Is that the same thing?

INTERIM CATS CEO CAGLE: Yes. We are happy to extend that either on the same day or alternate days? I know everybody's schedules are busy. We're happy to extend invitations and tours to any members that would like to come. Our folks love to show off what they do. They're very proud of it. At the risk of hopefully, no offense is taken, but I think Mayor Higdon and Councilmember Driggs, I think they were like kids in candy store in that workshop. We had a little bit of trouble keeping them on schedule because it's pretty interesting stuff to see and they are proud of showing it off. We would love to do that.

COMMISSIONER ALTMAN (Mecklenburg County): I always find field trips really constructive. A great use of time. Maybe I can induce the Mayor Elect of Huntersville to come with me?

MAYOR LYLES (City of Charlotte): Why don't we send out another ask by e-mail so that you can check yes or no and let us know? That includes all of the town managers, as well that are alternates. Please feel free to send it out and feel free to say yes and we will be able to get it done.

COMMISSIONER ALTMAN (Mecklenburg County): What is the status of the FTA?

INTERIM CATS CEO CAGLE: If you will recall, the FMO or financial management review started about two months ago. The FTA it took a little bit longer to select a special maintenance review consultant. They are on board, and we've had the opening meeting with them over the last month. They are now requesting and reviewing documents. It is our belief that they are going to merge the two so that the two reports come out together. That they will be doing fieldwork and January. We should expect initial results or draft report sometime in January to

February range, but if that changes or as they give us additional information, we will certainly share that with you.

COMMISSIONER ALTMAN (Mecklenburg County): Thank you so much. While were saying how great staff is, I would like to publicly thank CATS staff Jason Lawrence and Mr. Cagle for meeting with me and Commissioner Powell regarding some concerns that she was hearing from her district. It was much appreciated. Very detailed and very productive. Thank You.

V. Interim Chief Executive Officer's Report – Based on pages 50-70 in the MTC Agenda Packet for November 15th, 2023

Discussion:

INTERIM CATS CEO CAGLE: The workgroup, as part of the workgroup we started the risk analysis or risk review that work has started. The consultant has been conducting the pre-work interviewing staff. Then they will start to work to narrow in on the risk matrix based on the risks they've identified. We will also provide updates on that work as they come forward. I would say it's probably initial update in the next 60 days or so as we work through that with them. The second item of note, pages 6-49 of your packet are information requested at the last meeting. It is the UNC Charlotte Transit Advisory Group Study, and then there are minutes from the County Commission meeting that discussed some changes in the interlocal. Pages 6-49 is the background information. Jumping over to page 53 our monthly safety statistics. again, you our familiar with these bus operations division, again, standard reporting.

I will move through these from a first is bus operations division. Second a special transportation services on page 55. Third is our rail operations blue line starting on page 57. Moving into finally our rail operations division Gold Line on page 59. Starting on page 61, we have ridership information. I am going to jump all the way over to page 66 which is a summary of all the ridership information tables and what page 66 says is that ridership continues to be up. Total ridership was up about 7 ½%. October 2023 compared to October 2020. Ridership was up and all areas except Gold Line where we saw a decrease October to October. The Gold Line, I believe that trend, right now the Gold Line headways because of staffing, that trend will probably continue ridership being down because a year ago, the headways were approximately 20 minutes and today they are approximately 30 minutes. Until we can correct that, and we do intend to do that; I think that trend on the Gold Line will continue. Missed trips; we did very well last month, and they were under 2%, just about 1 1/2 % on missed trips for the month.

MAYOR LYLES (City of Charlotte): I would also like to add that this Monday, the Charlotte tte City Council approved a change in the access to Quality of Life programs. One of those would be the Gold Line where we went from a \$25 ticket to blocking the Gold Line ability to move along the corridor to \$100. If you are blocking the ability for the train to move or the streetcar to move, the fee is something that would be at least cause you to have some attention to it. We're going to try it out for a short period of time and get a report back and see what implications that would have because if it's not just the Gold Line, but it's bicycle trails and things like that. We are trying to make sure that we maintain more safely and make the experience of what we're trying to do with the ridership the Gold Line possible to reduce those headways in those respects.

COMMISSIONER ALTMAN (Mecklenburg County): With that CATS BOD fatalities, was there any fatalities in September? What was it?

INTERIM CATS CEO CAGLE: The most recent month reporting is October. I will get back to you on September and exactly what it is? October was a motorcyclist; someone riding a motorcycle ran a red light and ran into the side of the bus. That was a fatality involving a vehicle. That is a fatality involving a vehicle

COMMISSIONER ALTMAN (Mecklenburg County): Even if the CATS bus was on the receiving end of a traffic violation?

INTERIM CATS CEO CAGLE: Correct. The operator was making a turn. They were turning with the light; they had the light. A motorcyclist was trying to beat the light and unfortunately ran broadside into the bus.

COMMISSIONER ALTMAN (Mecklenburg County): Sending condolences to the family. That is horrible. The major reportable injuries for October we're 11. Can you speak to what those are as a category?

INTERIM CATS CEO CAGLE: When you see a number like that it's a major accident on one vehicle that was full. Let me get you the respect to that. If you recall, there was some video out recently where a pickup truck ran directly into the back of a bus. they were going very fast, and they changed lanes and literally just slammed into the back of a bus. that bus had many occupants on it and then let those injuries were severe, but there were injuries. Usually when you see a number like that like 11 or 13, what that indicates is that a bus with many passengers on board was involved in a traffic accident.

COMMISSIONER ALTMAN (Mecklenburg County): Thank you. In the graft with system sister reliability, it looks like the goal is less than three per 100,000 miles and last month is higher than it's been since April. I just wanted to get in a comment or thought you had about that?

INTERIM CATS CEO CAGLE: On bus operations and STS, both of those, that metric system reliability, what that means is when a bus is in-service and breaks down, it has to be taken out of service while it's in route. You can see that we do not meet that metric on either STS or bus very often. Quite frankly, it is more lucky when we do. It's the norm that we do not. That is a direct reflection of the age of the fleet. To respond to that, we have very significant purchases on both STS and BOD fleet. I would also interject that I think Mayor Higdon mentioned our drivers work very hard and they have a very hard job. We agree with that. One of the things that they identified when I started, when we talk to them about what are some things that would make your job easier, the bane of their existence are STS vehicles with ramps. They prefer a lift because a ramp, you have to push somebody up the ramp, Right now about half of our fleet has ramps and half of it has lifts. All of our fleet will have lifts with the new vehicles.

COMMISSIONER ALTMAN (Mecklenburg County): You would characterize this as a problem of age.

INTERIM CATS CEO CAGLE: Yes, this system reliability on BOD and STS is clearly a function of age of vehicles. They are all overdue. STS fleet is all due for replacement. The bus fleet is definitely not where we would want it.

COMMISSIONER ALTMAN (Mecklenburg County): Okay, Major system reliability, major mechanical failures, it looks like a high metric for September. Do you have any thoughts about that or can you comment on that? Major mechanical failures. Looking for less than three per 100,000 revenue car miles.

INTERIM CATS CEO CAGLE: Okay yes, the Blue Line. let me check into that metric. We had eight reported. Let me check into that metric, which did put us over the goal. Let me get you some more information on that metric.

VI. Informational Item – None

Resolution: A motion to approve the meeting of not only the town managers but Legal Representatives and the Mecklenburg County Manager to discuss the interlocal agreement for the MTC was made by **Mayor Melinda Bales (Town of Huntersville)**; seconded by **Mayor Rusty Knox (Town of Davidson)**. Motion carried unanimously.

VII. Action Item

A. Independence Busway Update

Brent Cagle

Brent Cagle – CATS Interim Chief Executive Officer – presented for action the Independence Busway Update; based on pages 72-73 in the MTC Agenda Packet for November 15th, 2023 meeting.

Discussion:

INTERIM CATS CEO CAGLE: You may recall about two months ago. CATS have supported the Independence Busway Project that we would help fund with NCDOT. Two months and the original budget on that project, set several years ago was inadequate. We came back and we said that and NCDOT believe due to cost escalations and inflation that the original budget would be inadequate and we informed the MTC about that. We also informed the MTC that the estimate was approximately \$1.3M of CATS contribution to reopen or convert the Independence Busway and make it usable.

NCDOT has done their RFP and they have final proposals, and the project is going to cost more than the \$1.3M. It will now, based on their bids cost CATS \$1.7M. An additional \$400,000 from where we had thought it was. We still support the project; however, we are requesting support from the MTC. Then we would need to move forward to City Council for a budget ordinance to increase our appropriation for the year. If there is support from the MTC on this project cost change, we will go to City Council on November 27th and seek their support for a budget ordinance or a change to our budget.

MAYOR LYLES (City of Charlotte): Mr. Cagle, would you describe the route and what it does actually? I know it's an increase in the cost but describe what it accomplishes and from where to where.

INTERIM CATS CEO CAGLE: The Independence Busway, I will look to Jason Lawrence to give you all of the details, but generally speaking the Independence Busway, what this project will do is give us early access to a dedicated lane out Independence. The lane is closed. It's not operable right now. Ultimately that lane will be converted to, the state calls it a managed lane, and the buses will have access to that managed lane, but that project is quite a few years out on their project horizon.

It's a little bit out of the project horizon. By doing this project now it gives us access to that lane as a dedicated bus lane in advance of the NCDOT managed lane project. We believe this will significantly reduce or benefit the passenger by reducing running time. We would intend to market the route in the changes to show the benefits to the rider. As it transitions into managed lane, that benefit is still realized.

JASON LAWRENCE: Five bus routes serve that corridor to/from Mint Hill, Lawyers Road and Harrisburg Road, coming off of Albemarle Road. There is a route for Matthews, there is a park-and-ride we constructed off of Sam Newell and there is an Idlewild routes as well. Of course, the 74X goes with Union County with a stop in Stallings. Those five routes will all use the busway from roughly Sharon Forest Drive to just west of Hawthorne Lane and near downtown Charlotte.

MAYOR KNOX (Town of Davidson): For historic reference, what was in this lane? Wasn't this lane designed for buses at one time?

JASON LAWRENCE: Probably late 90s there was a Busway demonstration project along the corridor and at the time the concept was to extend that throughout all of the highway 74 all the way to Matthews, but the initial segment was roughly from Hawthorne to just west of Eastway.

MAYOR LYLES (City of Charlotte): Yes, it was a long time in planning and working and finally. It does cost the increase in the cost. I think we're going to get benefit to the people that are going to be served. I think it is just a requirement almost for those folks to have adequate bus traffic on Independence Boulevard. Many of us have lived here long enough to watch the lane with no buses in it. This will allow us to have actual bus traffic.

MAYOR HIGDON (Town of Matthews): The single most question, I get asked, as a member of the MTC. Why is this not open for buses?

INTERIM CATS CEO CAGLE: We are working on it. We want it open for buses.

MAYOR HIGDON (Town of Matthews): The public once it very badly.

Resolution: A motion to amend the FY2024 Capital Investment Plan to add \$950K to the Independence Busway Restoration Project based on Actual Bids. Motion was made by **Mayor Melinda Bales (Town of Huntersville)**; seconded by **Commissioner Leigh Altman (Mecklenburg County)**. Motion carried unanimously.

B. February 2024 Service Change & Title VI Analysis

Bruce Jones

Bruce Jones – CATS Transportation Planner – presented for action the February 2024 Service Change and Title VI Analysis; based on pages 75-83 in the MTC Agenda Packet for November 15th, 2023 meeting.

Discussion:

MAYOR HIGDON (Town of Matthews): Is there any plan to attempt to reestablish the interval of service? I'm concerned that we just keep extending the in-rural service to make it more reliable and if we take it to the extreme, we could go twice a day and guarantee that were always there on time. I think at some point were hurting the usefulness of the route.

BRUCE JONES: Absolutely. I think the goal we're working on currently is getting our operator pool back up. Once we get that in a good place, we will start addressing some of the areas we had to make cuts. I think in particular we start focusing on how we can improve on-time performance throughout the network. As we begin going future dates we will start to look at how we can restore frequency levels. We're currently actively working toward getting that pool up. We can share more detail at a later date once we have more information on that.

INTERIM CATS CEO CAGLE: We will also be doing a running time analysis, which goes to that question as well. We hadn't done a running time analysis and many years. We strongly suspect or know that some of our routes are very difficult to serve because they are just simply too long. What that would be combined as part of the work effort.

MAYOR BALES (Town of Huntersville): Just a couple questions in regards to Forest Point Business Park. What type of business currently reside in Forest Point?

BRUCE JONES: There is a mixture. I know Spectrum has a call center there. I think there's a couple other logistics companies over there as well. We attempted to engage Spectrum, it failed. When we did the initial outreach, they informed us that nobody uses the route. It wouldn't impact them. Although we even though we tried to give them information. We will continue to try to engage and work with them.

MAYOR BALES (Town of Huntersville): Spectrum is the largest employer?

BRUCE JONES: They're one of the most recent employers. Then there's other business there as well. Looking at the ridership and the survey results, we have a number of individuals that said that they traveled to Spectrum which conflicts with what they said but of course we will continue to try to engage them to see how we can mitigate that?.

MAYOR BALES (Town of Huntersville): With these modifications to the route, how far is that last stop closest to the Park?

BRUCE JONES: It's about .5-mile walk from the furthest stop. Within the business park. To get to the closest up which is just north of Arrowood, that would be a .5-mile walk.

MAYOR BALES (Town of Huntersville): If you're having conversations with the businesses in there, I would highly encourage conversation around any shift change in their schedules which may be an impact to the ridership. I see that in Commerce Station in Huntersville where those shifts have modified and then it doesn't work for those employees. I

would just hate to see individuals not being able to access employment and lose their jobs because they're not able there.

MAYOR KNOX (Town of Davidson): I know that a couple of the drivers we have our frequency and reliability when we are talking about public transit. Looking at route 57 where you are currently shown the 55% performance rate, you have cut out the Forest Point Business Park. Do you have projection for where that performance rate will go? It looks like you cut off may be a half-mile of the route and that's it. Is that increase that 55% performance rate exponentially or will it just take up a little bit? Because it doesn't look like a lot of footprints was changed on that vs the 235.

BRUCE JONES: It's a small footprint, but given conditions, for instance when we go down there, we circulate sometimes and we get stuck at that light before we crossed back over Arrowood. Little factors like that can add up in terms of adding time to the route. It's a small change and of course we will continue to monitor it. Looking at current estimates, we are showing that it will improve but of course real-world estimates vs computer estimated are another thing. We will have to do a continued evaluation of that. I think the 57 as a whole is a route were looking at structurally to see how we could maybe realign service to South Park. There are other things we are considering with that route as well. This is one of the first stages of how we improve service along that.

MAYOR KNOX (Town of Davidson): I was less worried about the 235 because you're already at 75% performance rate. Any modification could see an uptick to where you'd like to be at the 85%. I'm not as concerned about that small modification on 57, because 55% performance rate is not where we want to be.

BRUCE JONES: We will work. We are rolling out signal priority throughout our network. We will work with CDOT to determine where we are with that. That could be another factor that could help us improve overall time. I think with this change we will continue to monitor and see if there is anything additional that we have to do.

MAYOR LYLES (City of Charlotte): I think that what you heard is we need to go into the business park into a little bit more due diligence, not just with one of the businesses, but multiple ones. As well as the assessment and perhaps I don't know when we come back on these, but at some point, you need to know whether it's successful. I do have to say that the idea of many of the social services that are provided by the county reentry drug and treatment things, that and the ability to get to centers that the county has, those are important areas. I know I've heard somewhere that the West Boulevard corridor needs the ability to get to the Walmart. Right now, there working a lot of seniors there that are pushing the cards or they are taking a taxi and that is very expensive compared to what we have now. I hope that we are going to continue to review the changes that goes by. I don't know if there's a standard to put something in place for six weeks or six months. I think it's worth having something that we can determine did it work, or did it accomplish the objectives we want it to have.

INTERIM CATS CEO CAGLE: We can absolutely do that. I will point out that we change schedule at designated times each year, February is one of these times. This is the designated February change. if the MTC decides to wait until January, it will leave us only a matter of weeks to make these changes or implement these changes. We certainly can do that. Once if the

changes are made, we can continue to monitor likely would any routes to see if they had the desired effects and those kinds of things. I will say I believe that 57 is the McCloud Center. The McCloud Center is one of those were the folks receiving service at that center need those services seven days a week and during extended hours That was a primary driver when we became aware that the center was now because of their new location was not as accessible for transit.

MAYOR LYLES (City of Charlotte): I'm glad that you're reacting to something that they've done because they needed the expansion but the same time, where including service and transportation for their clients as well, in this change.

MAYOR KNOX (Town of Davidson): I'm assuming we're going to approve this, but monitoring this, when can you report back and say hey, we are doing better? Is this something that you can look at quarterly?

INTERIM CATS CEO CAGLE: We certainly can, once implemented, we can certainly look at it. We can look at it daily. Daily doesn't make a trend. I would say we do it quarterly. We're happy to talk more about all of the routes. These two were suggesting changes, but like I said the runtime analysis and all of these things. There are other routes that we have in the system that we need to reevaluate as well.

Resolution: A motion to move forward with the changes recommended for Route 57 and Route 235 in February 2023. Motion was made by **Mayor John Higdon (Town of Matthews)**; seconded by **Mayor Woody Washam (Town of Cornelius)**. Motion carried unanimously.

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

Krissy Oechslin (Chairwoman) reported the following: We approved the proposed changes that you just approved for the service changes. In every TSAC meeting we have a service issues section where we discuss problems that we've been having, bus that's consistently late, bus shelter damaged or just anything people bring to our attention. We had a lot of discussion about some issues with the CATS app being there is a lag between what the app when the bus is coming vs the map on the app where it shows where the actual bus is. We've heard that they are working on that. That is encouraging. CATS is also working on a better way to get our input like some sort of more real-time whether it's something in the app or away if we're on a bus and there's a problem we don't have to wait until the next TSAC meeting or have a big circle of e-mails where we can submit it right then. Going back to what Mayor Lyles said fines going from \$25 to \$100, that has been something that we didn't vote on that as a body, but cars blocking the Gold Line is something that has come up in TSAC meetings for years. It safe for me to say that members of TSAC are very happy to see that but one thing that came up and two meetings ago is that we would love to see that also apply to bus stops because when cars parked in a bus stop, the bus has to wait for them to move. It can impede folks with mobility issues if there's not a safe place for the bus to extend the ramp or the lift. We would like to see that fine. I think that something that many TSAC members with support of that that applied to bus stops.

MAYOR LYLES (City of Charlotte): That was discussed in our session where we approved it for the areas we have now, but it is on the top of the list for the next discussion of quality life changes.

KRISSY OECHSLIN (TSAC Chairwoman): That's awesome. Finally, this is not just my last MTC meeting as the TSAC Chair, I am stepping down from TSAC to move way for year. I appreciate having had this opportunity to advocate for transit riders. Charlotte has an ambitious modal share goal of getting down to only 50% single occupancy vehicle commutes. That's a steep hill to climb. I know there are so many people like myself in Charlotte that know the only way to accommodate the region's growth is not by building more roads, but to get more people on buses, trains, and bikes and out of their cars. I encourage the future chairs of CTAG and TSAC to keep making noise and keep advocating for public transit. As part of the ongoing discussion about how govern transit in the region? A future MTC, whatever that might look like, should give a vote to the citizens who write transit and sit at this table. My last comment is just that I think that CATS is finally headed in the right direction. Just keep it up with a focus on customer experience. We've been seeing strongly recently. Add more bus and train frequency by getting more operators. Frequency is freedom and frequent service will bring more writers. Thank you again for the opportunity to serve on TSAC.

MAYOR LYLES (City of Charlotte): Thank you very much for the time you have spent. You may be the longest-term mayor? I mean chair? I guess it feels like the mayor some days, doesn't it? I want to say thank you very much for what you've done, and your participation has added invaluable experience and reality to what we do in this world every day.

MAYOR HIGDON (Town of Matthews): I had a quick comment based on something you said. When I drove back to my home in Matthews yesterday from CATS over on South Boulevard I passed about, 12 or 15 schools as the schools were letting out. You talk about single occupancy cars, we have whole roads being shut down with 500 parents picking up their kids all at once with one parent and each car. That's gotta be a huge opportunity for improvement or working with PTAs or something if they could carpool or maybe ride the bus? It's really frustrating. It happens twice a day in Matthews and in all of our communities where we have these massive lines of one hundreds of cars and one parent in each car picking their child up from school. That may be an opportunity for us to look at.

MAYOR LYLES (City of Charlotte): I think all of us understand that experience. Mine is where they idled the car sitting in the carpool line, they don't even turn off the ignition. It's kind of America, I guess? American to do that. I also wanted to said to Mayor Bales, before you came. I wanted to say thank you for this service you have given to this effort. You have been tremendously helpful and have led the way for Huntersville to have voice. Thank you very much and there will be a gift and the mail at some point. We will get that to you as well. You and Mayor Edwards. If you would like to say anything, we would welcome that.

MAYOR BALES (Town of Huntersville): Thank you very much. I have thoroughly enjoyed, almost surprisingly so I have enjoyed working with the MTC and the staff of CATS. I appreciate the diligence and the effort that you put in each and every day. Thank you for that. I hope I can continue to be an advocate and work with everyone and move our transit goals forward for our region.

With that I would just say Thank you for allowing me a seat at the table. I've enjoyed working with each and every one of you.

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

Jeffery Parker (Co Chairman- Mecklenburg County): I do not have much of a report to offer since this is my second MTC meeting since my last CTAG meeting. Hopefully, at my next meeting I will provide a report. I did want to provide a little bit of the input on the Independence Busway Project. I know it's a little late for that. I am a rider of the 40Xx and the 46X. I can tell you without hesitation reopening the busway would be a monumental improvement. Depending on the day it would save between five and 15 minutes per trip. That would be a much needed improvement.

X. Other Business - None

XI. Adjourn

The meeting was adjourned at 4:529 p.m. by Mayor Vi Lyles, City of Charlotte – MTC Chairwoman.

NEXT MTC MEETING: WEDNESDAY, JANUARY 24TH, 2024; STARTS AT 5:30 P.M.

January 2024 Meeting – Summary of Monthly Statistics & Information

Safety Summary

- December Special Transportation Service Safety Performance Measures
 - Chart: Preventable collisions with damage greater than \$500.
 - In December, there was an incident involving a special transportation bus. While operating on its route, the bus made contact with the rear of another vehicle.

Ridership Summary

- Highlights since January 2022
 - Since Spring 2022, bus ridership has exhibited a consistent upward trend. As of October 2023, the number of passengers has surged by 43% compared to January 2022, reflecting a sustained increase in usage.
 - Rail ridership has shown remarkable growth throughout 2023. Notably, it has now doubled compared to the early months of 2022. This growth is especially evident on the Blue Line during peak hours.
 - Special events have played a key role in boosting overall ridership. On certain event days, the passenger count has soared, exceeding 60% more than what is typically observed on a regular day.
 - The ridership patterns are indicative of the evolving hybrid work model. There is a noticeable spike in ridership from Tuesday to Thursday, contrasting with comparatively lower numbers on Mondays and Fridays.
- November/December 2023 Missed Trips & Ridership Reports
 - Bus Service Missed Trips Highlights
 - Missed Trips in November continued to decrease since its previous uptick in September 2023.
 - December experienced a slight increase around the holidays but remain lower than recent averages.
 - Ridership Highlights
 - Overall ridership continued to increase during the months of November (12.8%) and December (9.8%).
 - In November, Local Routes were up 11.1%
 - In December, Local Routes were up 9.2%
 - Local Express Routes experienced an increase in ridership of 14.4% in November; 2.0% in December.
 - Overall Rail ridership increased by 16.4% in November; 12.8% in December.
 - Blue Line ridership increased 19.4% in November; 15.5% in December.
 - Gold Line ridership decreased by 8% in November; 11.5% in December.

Communications Summary

- Charlotte Area Transit System Incident
 - A detailed communication was disseminated regarding an incident that occurred on Friday, November 17, 2023, at the Charlotte Transportation Center LYNX Blue Line

station. This incident involved Strategic Security Corp, one of our contract security companies, an unticketed person was found loitering in the fare zone.

- Passing of Mayor Reid of Gastonia
 - An official announcement was sent to the MTC board concerning the passing of Mayor Reid of Gastonia. In a show of respect and condolence, flowers were sent on behalf of the MTC board and CATS to Mayor Reid's family.
- Bus Incident on Lasalle Road
 - An email was sent about an incident on Route 3, where a bus operator was struck by a stray bullet stemming from a nearby conflict between individuals unaffiliated with the bus service. Thankfully, no passengers were harmed. The bus operator is currently at home and recuperating.
- Storm Preparedness Measures
 - An email was circulated outlining the proactive measures taken by CATS during the inclement weather event that hit Charlotte on January 9, 2024. These actions demonstrate our ongoing commitment to closely monitor weather systems and collaborate effectively with Charlotte Emergency Management.
- NCDOT SSO Directive Compliance
 - A notice was sent regarding the recent directive from NCDOT SSO. It included a comprehensive outline of the steps CATS is undertaking to ensure that all maintenance activities are conducted with the highest regard for the safety of our employees and the community at large.

The following safety report provides metrics and trends on safety issues as of December 2023, audit findings and open Corrective Action Plans.

Bus Operations Division Safety Performance Measures

Fatality Incidents Goal: 0 per 100k mi

CY 2023	Incidents	Bus Revenue Miles	Rate
January	0	923,601	0.00
February	0	837,470	0.00
March	0	945,219	0.00
April	0	878,901	0.00
May	0	917,647	0.00
June	0	889,593	0.00
July	0	889,099	0.00
August	0	939,346	0.00
September	1	867,111	0.12
October	0	939,973	0.00
November	0	894,813	0.00
December	0	899,770	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
January	1	0	923,601	0.11
February	0	1	837,470	0.12
March	2	4	945,219	0.63
April	1	18	878,901	2.16
May	0	1	917,647	0.11
June	0	4	889,593	0.45
July	2	13	889,099	1.69
August	0	0	939,346	0.00
September	1	0	867,111	0.12
October	1	11	939,973	1.28
November	0	5	894,813	0.56
December	2	0	899,770	0.22

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
January	4	923,601	0.43
February	9	837,470	1.07
March	2	945,219	0.21
April	1	878,901	0.11
May	2	917,647	0.22
June	3	889,593	0.34
July	4	889,099	0.45
August	1	939,346	0.11
September	4	867,111	0.46
October	4	939,973	0.43
November	7	894,813	0.78
December	4	899,770	0.44

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

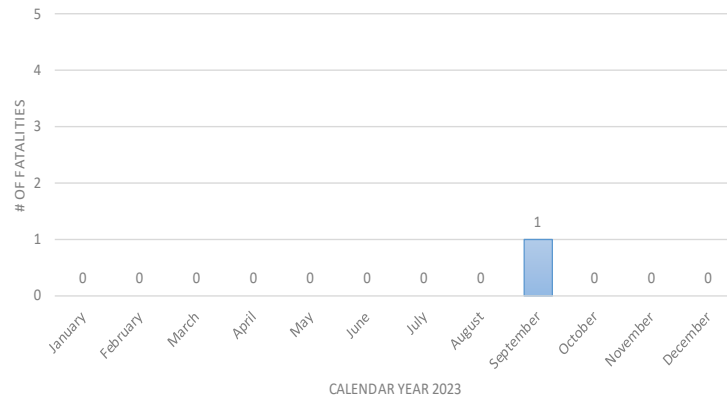
System Reliability Goal: < 10 per 100k mi

CY 2023	Incidents	Bus Revenue Miles	Rate
January	119	923,601	12.88
February	90	837,470	10.75
March	98	945,219	10.37
April	99	878,901	11.26
May	107	917,647	11.66
June	105	889,593	11.80
July	107	889,099	12.03
August	102	939,346	10.86
September	102	867,111	11.76
October	95	939,973	10.11
November	74	894,813	8.27
December	87	899,770	9.67

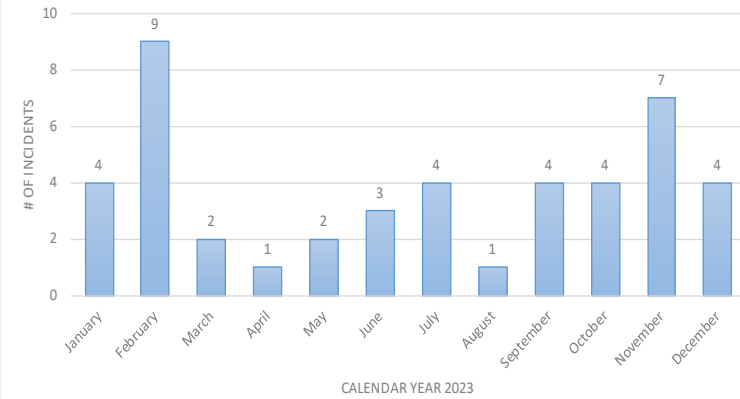
Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Bus Operations Division Safety Performance Measures

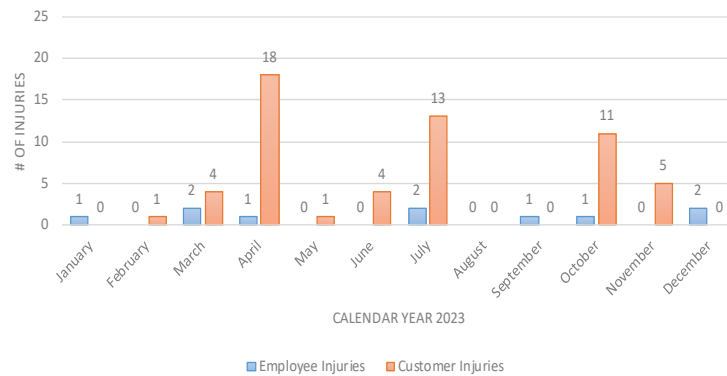
CY 2023 CATS BOD Fatalities



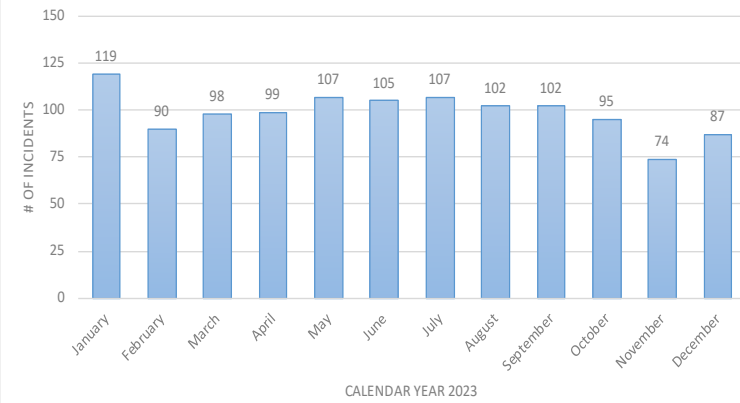
CY 2023 CATS BOD Preventable Collisions ≥ \$500



CY 2023 CATS BOD Total NTD Major Reportable Injuries (Employee & Customer)



CY 2023 CATS BOD System Reliability Incidents



Special Transportation Service Safety Performance Measures

Fatality Incidents
Goal: 0 per 100k mi

CY 2023	Incidents	STS Revenue Miles	Rate
January	0	171,142	0.00
February	0	164,394	0.00
March	0	184,635	0.00
April	0	160,338	0.00
May	0	169,378	0.00
June	0	165,612	0.00
July	0	165,903	0.00
August	0	178,541	0.00
September	0	167,222	0.00
October	0	180,560	0.00
November	0	173,620	0.00
December	0	161,823	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
January	0	0	171,142	0.00
February	0	0	164,394	0.00
March	0	0	184,635	0.00
April	0	0	160,338	0.00
May	0	0	169,378	0.00
June	0	0	165,612	0.00
July	0	0	165,903	0.00
August	0	0	178,541	0.00
September	0	0	167,222	0.00
October	0	0	180,560	0.00
November	0	0	173,620	0.00
December	1	0	161,823	0.62

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

Preventable Collisions w/ Damage ≥ \$500
Goal: 0.3 per 100k mi

CY 2023	Incidents	STS Revenue Miles	Rate
January	0	171,142	0.00
February	0	164,394	0.00
March	1	184,635	0.54
April	0	160,338	0.00
May	0	169,378	0.00
June	0	165,612	0.00
July	0	165,903	0.00
August	1	178,541	0.56
September	1	167,222	0.60
October	0	180,560	0.00
November	0	173,620	0.00
December	1	161,823	0.62

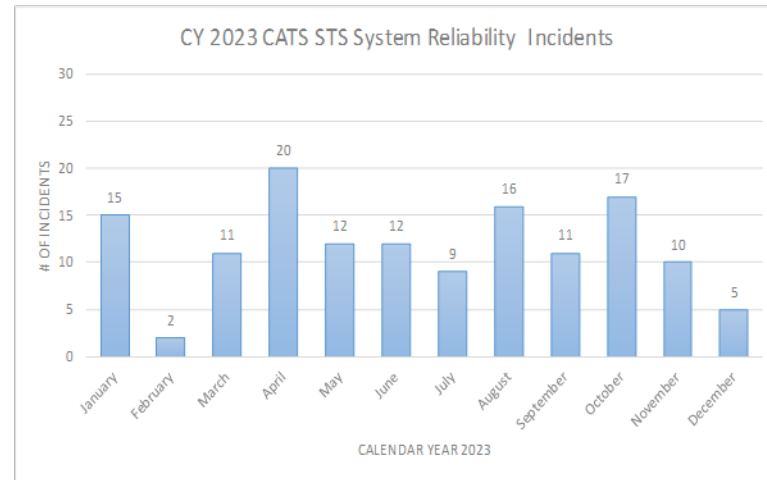
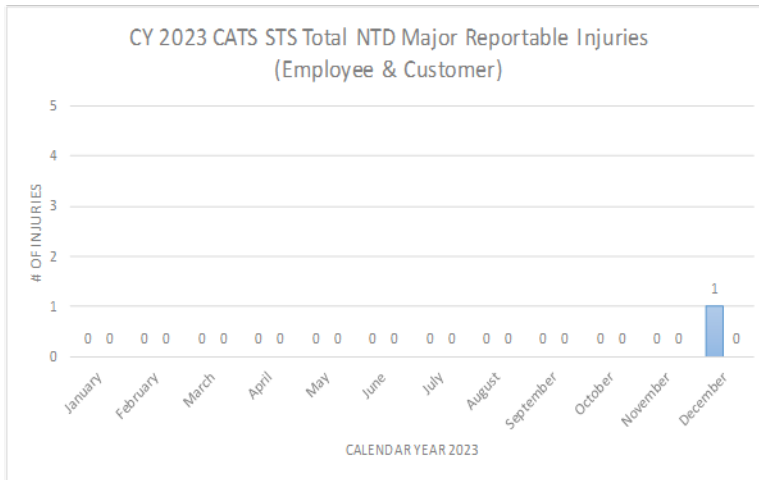
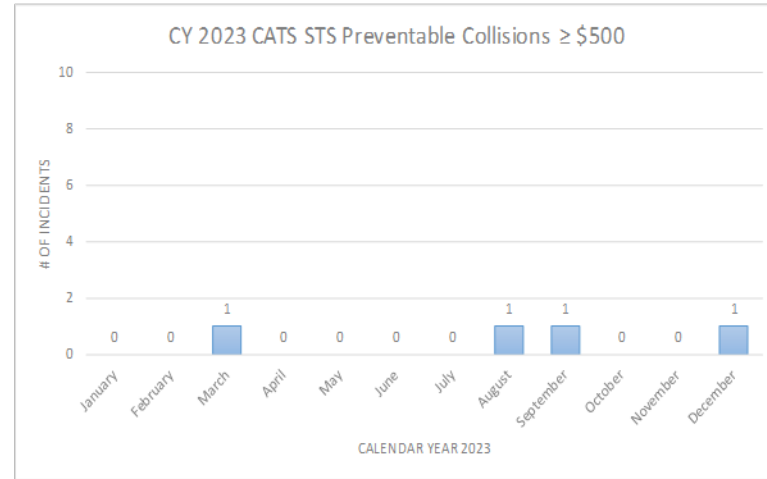
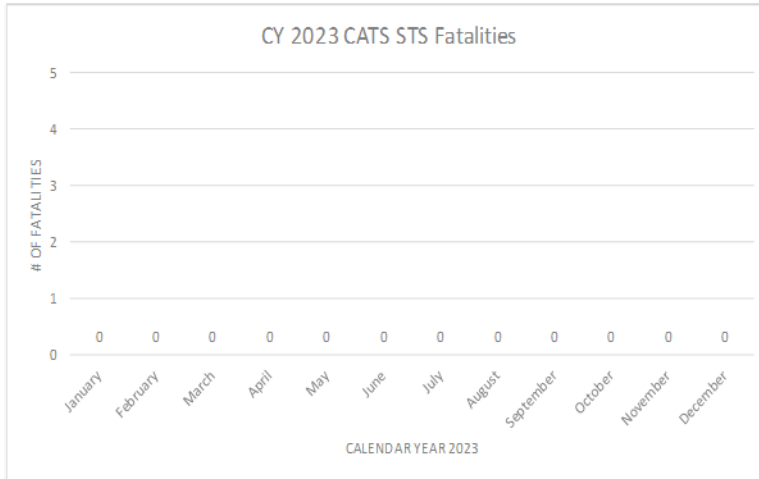
Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

System Reliability
Goal: < 3 per 100k mi

CY 2023	Incidents	STS Revenue Miles	Rate
January	15	171,142	8.76
February	2	164,394	1.22
March	11	184,635	5.96
April	20	160,338	12.47
May	12	169,378	7.08
June	12	165,612	7.25
July	9	165,903	5.42
August	16	178,541	8.96
September	11	167,222	6.58
October	17	180,560	9.42
November	10	173,620	5.76
December	5	161,823	3.09

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

Special Transportation Service Safety Performance Measures



Rail Operations Blue Line Safety Performance Measures

Fatality Incidents

Goal: 0 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	0	130,949	0.00
February	0	123,072	0.00
March	0	138,277	0.00
April	0	132,083	0.00
May	0	137,129	0.00
June	0	132,069	0.00
July	0	126,973	0.00
August	0	139,812	0.00
September	0	132,711	0.00
October	0	129,047	0.00
November	0	132,758	0.00
December	0	138,626	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
January	0	0	130,949	0.00
February	0	0	123,072	0.00
March	0	0	138,277	0.00
April	0	0	132,083	0.00
May	0	0	137,129	0.00
June	0	0	132,069	0.00
July	0	0	126,973	0.00
August	0	0	139,812	0.00
September	0	0	132,711	0.00
October	0	0	129,047	0.00
November	0	1	132,758	0.75
December	0	0	138,626	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 Revenue Car 100k mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	0	130,949	0.00
February	0	123,072	0.00
March	0	138,277	0.00
April	0	132,083	0.00
May	0	137,129	0.00
June	0	132,069	0.00
July	1	126,973	0.79
August	1	139,812	0.72
September	0	132,711	0.00
October	0	129,047	0.00
November	0	132,758	0.00
December	0	138,626	0.00

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

System Reliability (Major Mechanical Failures)

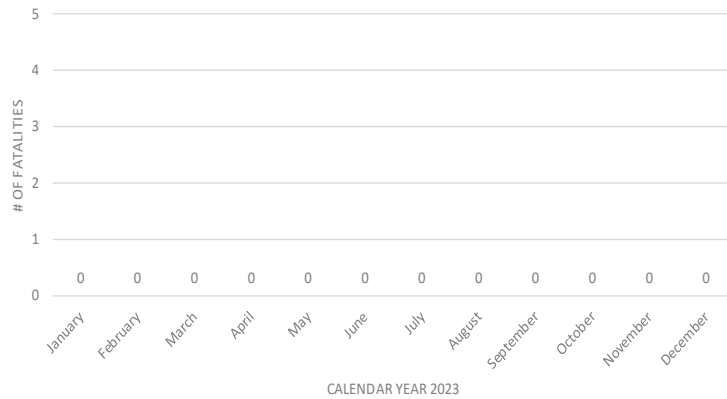
Goal: < 3 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	9	130,949	6.87
February	10	123,072	8.13
March	4	138,277	2.89
April	6	132,083	4.54
May	3	137,129	2.19
June	4	132,069	3.03
July	3	126,973	2.36
August	3	139,812	2.15
September	8	132,711	6.03
October	3	129,047	2.32
November	2	132,758	1.51
December	6	138,626	4.33

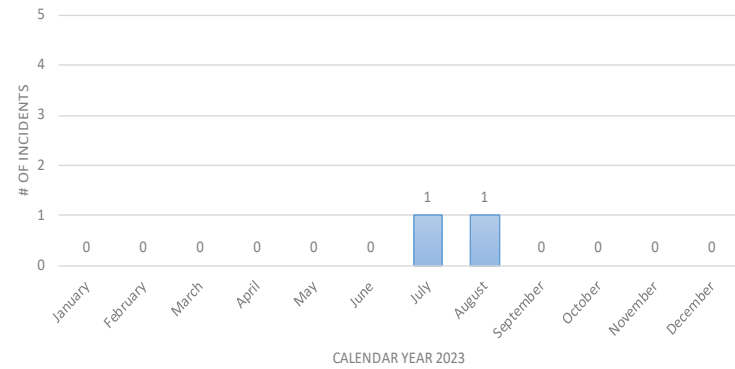
Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Rail Operations Blue Line Safety Performance Measures

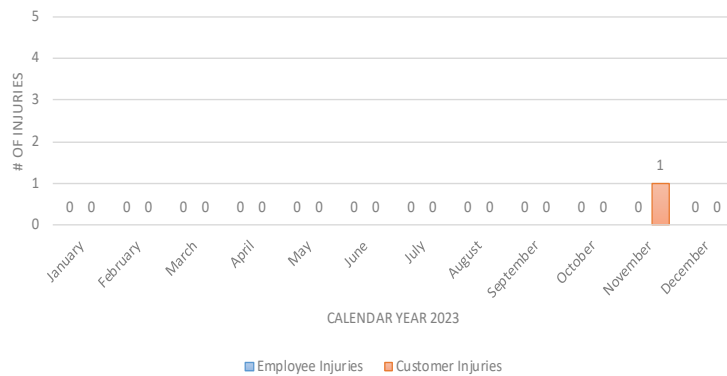
CY 2023 CATS Blue Line Fatalities



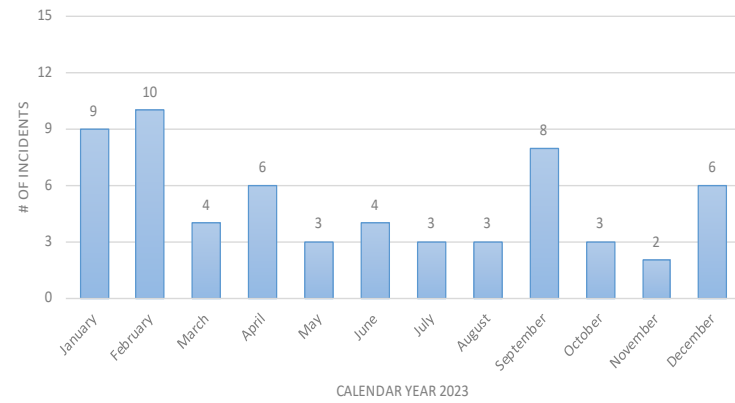
CY 2023 CATS Blue Line Preventable Safety Incidents
(FTA Reportable)



CY 2023 CATS Blue Line Total NTD Major Reportable Injuries
(Employee & Customer)



CY 2023 CATS Blue Line Major Mechanical Failures



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	11,696	0.00
February	0	10,695	0.00
March	0	11,793	0.00
April	0	10,574	0.00
May	0	11,766	0.00
June	0	10,506	0.00
July	0	8,950	0.00
August	0	9,781	0.00
September	0	7,369	0.00
October	0	7,279	0.00
November	0	7,282	0.00
December	0	7,653	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 Revenue Car 100k mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	0	11,696	0.00
February	1	10,695	9.35
March	0	11,793	0.00
April	0	10,574	0.00
May	0	11,766	0.00
June	0	10,506	0.00
July	0	8,950	0.00
August	0	9,781	0.00
September	0	7,369	0.00
October	0	7,279	0.00
November	0	7,282	0.00
December	0	7,653	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
January	0	0	11,696	0.00
February	0	0	10,695	0.00
March	0	0	11,793	0.00
April	0	0	10,574	0.00
May	0	0	11,766	0.00
June	0	0	10,506	0.00
July	0	0	8,950	0.00
August	0	0	9,781	0.00
September	0	0	7,369	0.00
October	0	0	7,279	0.00
November	0	0	7,282	0.00
December	0	0	7,653	0.00

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

System Reliability (Major Mechanical Failures)

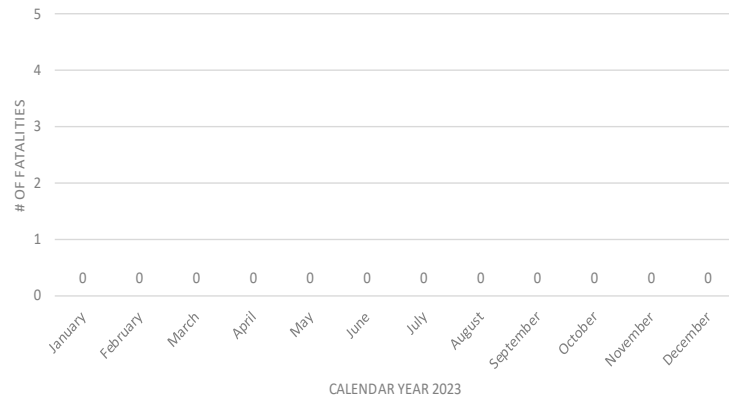
Goal: < 3 per 100k Revenue Car mi

CY 2023	Incidents	Total Car Revenue Miles	Rate
January	0	11,696	0.00
February	1	10,695	0.28
March	0	11,793	0.00
April	3	10,574	0.85
May	1	11,766	0.25
June	0	10,506	0.00
July	1	8,950	0.34
August	2	9,781	0.61
September	1	7,369	0.41
October	0	7,279	0.00
November	0	7,282	0.00
December	0	7,653	0.00

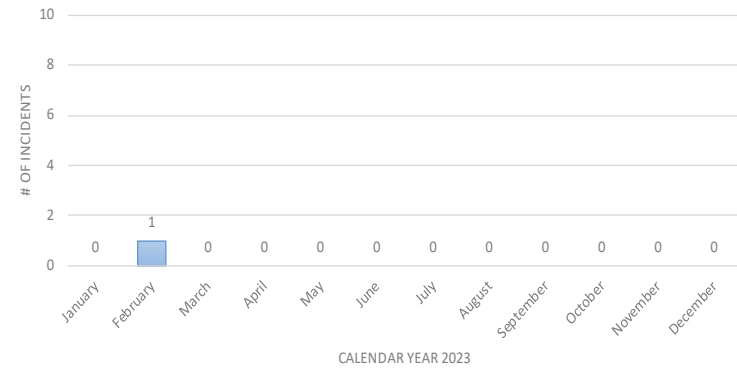
Rate Formula				
# of incidents	=	x.xx	*	100,000
# of revenue miles				= Rate per 100,000 miles

Rail Operations Gold Line Safety Performance Measures

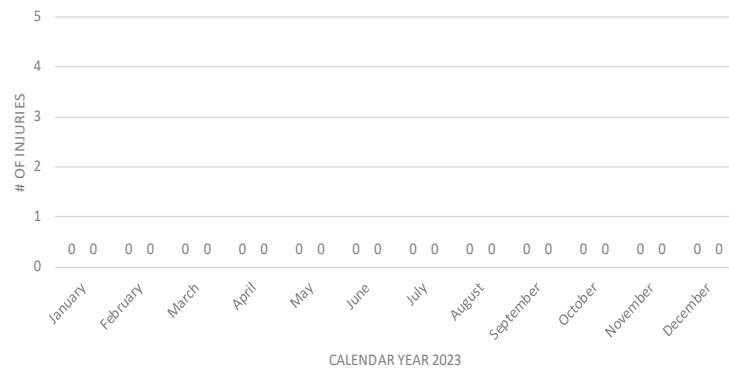
CY 2023 CATS Gold Line Fatalities



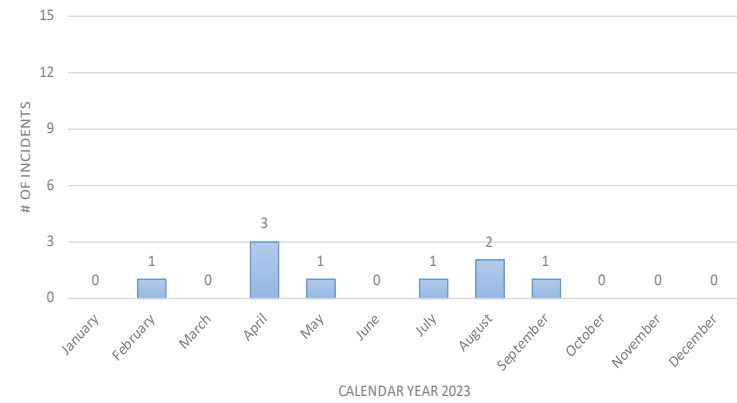
CY 2023 CATS Gold Line Preventable Safety Incidents
(FTA Reportable)



CY 2023 CATS Gold Line Total NTD Major Reportable Injuries
(Employee & Customer)



CY 2023 CATS Gold Line Major Mechanical Failures



Metropolitan Transit Commission
Charlotte Area Transit System Ridership
Nov-23

Mode / Service	Percent			YTD	YTD	Percent	Avg Daily Ridership per Month		
	Nov-23	Nov-22	Increase/De	FY 2024	FY 2023	Increase/Decrease	WeekDay	Saturday	Sunday
Local									
BOD Local	558,762	458,628	21.8%	2,909,719	2,227,782	30.6%	21,427	15,332	10,715
Subtotal	558,762	458,628	21.8%	2,909,719	2,227,782	30.6%	21,427	15,332	10,715
Local Express									
Arboretum Express	899	10	8,890.0%	5,298	21	25,128.6%	45	-	-
Harrisburg Road Express	992	926	7.1%	5,670	4,620	22.7%	50	-	-
Northcross Express	2,621	2,315	13.2%	13,441	11,500	16.9%	131	-	-
Idlewild Road Express	720	735	-2.0%	4,055	3,509	15.6%	36	-	-
Independence Blvd Express	2,217	1,677	32.2%	10,003	7,861	27.2%	111	-	-
Lawyers Road Express	1,176	808	45.5%	6,304	4,135	52.5%	58	-	-
Mountain Island Express	166	11	1,409.1%	1,070	11	9,627.3%	8	-	-
Northlake Express	1,748	1,157	51.1%	10,141	7,071	43.4%	87	-	-
North Mecklenburg Express	4,410	2,772	59.1%	19,352	15,659	23.6%	221	-	-
Huntersville Express	2,758	2,272	21.4%	15,729	11,924	31.9%	138	-	-
Rea Road Express	1,087	784	38.6%	6,344	5,498	15.4%	54	-	-
Steele Creek Express	490	8	6,025.0%	1,988	8	24,750.0%	25	-	-
Huntersville Greenhouse Express	156	91	71.4%	968	626	54.6%	8	-	-
Subtotal	19,440	13,566	43.3%	100,363	72,443	38.5%	972	-	
Regional Express									
Gastonia Express	916	514	78.2%	4,657	3,258	42.9%	46	-	-
Rock Hill Express	973	640	52.0%	4,694	3,290	42.7%	49	-	-
Union County Express	772	698	10.6%	3,853	3,342	15.3%	39	-	-
Subtotal	2,661	1,852	43.7%	13,204	9,890	33.5%	134	-	
Community Circulator									
Neighborhood Shuttles	16,627	14,926	11.4%	87,277	67,014	30.2%	676	457	168
Eastland Neighborhood Shuttle	8,710	7,657	13.8%	48,676	40,665	19.7%	316	278	201

Metropolitan Transit Commission**Charlotte Area Transit System Ridership****Nov-23**

Pineville-Matthews Road	2,193	1,647	33.2%	12,125	7,709	57.3%	97	51	-
Village Rider	4,178	3,940	6.0%	24,196	19,544	23.8%	163	112	74
Subtotal	31,708	28,170	12.6%	172,274	134,932	27.7%	1,252	898	443
Human Services Transportation									
Special Transportation Services	14,694	15,543	-5.5%	77,222	76,211	1.3%	581	268	213
Subtotal	14,694	15,543	-5.5%	77,222	76,211	1.3%	581	268	213
Rideshare Services									
Vanpool	2,990	3,798	-21.3%	17,889	18,860	-5.1%	124	35	35
Subtotal	2,990	3,798	-21.3%	17,889	18,860	-5.1%	124	35	35
Rail									
LYNX Blue Line	467,888	391,900	19.4%	2,506,497	2,167,450	15.6%	16,966	13,752	11,960
CityLynx Gold Line	44,692	48,592	-8.0%	238,653	248,231	-3.9%	1,738	1,034	952
Subtotal	512,580	440,492	16.4%	2,745,150	2,415,681	13.6%	18,704	14,786	12,912
Total	1,142,835	962,049	18.8%	6,035,821	4,955,799	21.8%	43,194	31,319	24,318

Metropolitan Transit Commission
Charlotte Area Transit System Ridership Report
Nov-23

Source:

Fixed Route Bus - Automatic Passenger Counts

Rail - Automatic Passenger Counts

Mode / Service	Nov-23	Nov-22	Percent Increase / Decrease	Average Daily Ridership		
				Weekday	Saturday	Sunday
Local						
BOD Local	693,427	624,306	11.1%	26,765	18,790	13,010
Subtotal	693,427	624,306	11.1%	26,765	18,790	13,010
Local Express						
Arboretum Express	1,137	3,348	-66%	57	-	-
Harrisburg Road Express	1,239	155	698.6%	62	-	-
Northcross Express	3,641	874	316.5%	182	-	-
Idlewild Express	841	2,181	-61.4%	42	-	-
Independence Blvd Express	2,752	4,604	-40.2%	138	-	-
Lawyers Road Express	1,431	1,156	23.9%	72	-	-
Steele Creek Express	665	1,128	-41%	33	-	-
Northlake Express	2,633	1,221	115.6%	132	-	-
North Mecklenburg Express	5,470	1,046	422.9%	274	-	-
Huntersville Express	3,741	940	297.9%	187	-	-
Rea Road Express	1,325	2,412	-45.1%	66	-	-
Mountain Island Express	316	41	680%	16	-	-
Huntersville Greenhouse	123	3,032	-95.9%	6	-	-
Subtotal	25,314	22,137	14.4%	1,266	-	-
Regional Express						
Gastonia Express	1,272	179	611.9%	64	-	-
Rock Hill Express	1,147	29	3793.0%	57	-	-
Union County Express	1,128	1,044	8.0%	56	-	-

Subtotal	3,546	1,252	183.1%	177	-	-
Community Circulator						
Neighborhood Shuttles	20,896	20,270	3.1%	833	617	232
Eastland Neighborhood Shuttle	11,986	10,660	12.4%	435	396	265
Pineville-Matthews Road	2,573	2,467	4.3%	106	90	-
Village Rider	6,551	6,641	-1.3%	242	184	157
Subtotal	42,006	40,038	4.9%	1,616	1,278	654
Human Services Transportation						
Special Transportation Services	14,694	15,543	-5.5%	609	266	198
Subtotal	14,694	15,543	-5.5%	609	266	198
Rideshare Services						
Vanpool	2,990	3,798	-21.3%	151	40	51
Subtotal	2,990	3,798	-21.3%	151	40	51
Rail						
LYNX Blue Line	467,888	391,900	19.4%	16,966	13,752	11,960
CityLynx Gold Line	44,692	48,592	-8.0%	1,738	1,034	952
Subtotal	512,580	440,492	16.4%	18,704	14,786	12,912
Total	1,294,557	1,147,565	12.8%	49,288	35,160	26,825

Metropolitan Transit Commission
Charlotte Area Transit System Ridership
Dec-23

Mode / Service	Percent			YTD	YTD	Percent	Avg Daily Ridership per Month		
	Dec-23	Dec-22	Increase/Decrease	FY 2024	FY 2023	Increase/Decrease	WeekDay	Saturday	Sunday
Local									
BOD Local	533,107	439,266	21.4%	3,442,826	2,667,048	29.09%	20,224	15,110	8,843
Subtotal	533,107	439,266	21.4%	3,442,826	2,667,048	29.1%	20,224	15,110	8,843
Local Express									
Arboretum Express	707	231	206.1%	6,005	252	2,282.9%	35	-	-
Harrisburg Road Express	892	722	23.5%	6,562	5,342	22.8%	45	-	-
Northcross Express	1,957	1,739	12.5%	15,398	13,239	16.3%	98	-	-
Idlewild Road Express	581	671	-13.4%	4,636	4,180	10.9%	29	-	-
Independence Blvd Express	1,346	1,107	21.6%	11,349	8,968	26.5%	67	-	-
Lawyers Road Express	849	631	34.5%	7,153	4,766	50.1%	42	-	-
Mountain Island Express	218	81	169.1%	1,288	92	1,300.0%	11	-	-
Northlake Express	1,217	819	48.6%	11,358	7,890	44.0%	61	-	-
North Mecklenburg Express	2,886	1,822	58.4%	22,238	17,481	27.2%	144	-	-
Huntersville Express	1,909	1,754	8.8%	17,638	13,678	29.0%	95	-	-
Rea Road Express	804	460	74.8%	7,148	5,958	20.0%	40	-	-
Steele Creek Express	435	93	367.7%	2,423	101	2,299.0%	22	-	-
Huntersville Greenhouse Express	53	83	-36.1%	1,021	709	44.0%	3	-	-
Subtotal	13,854	10,213	35.7%	114,217	82,656	38.2%	692	-	
Regional Express									
Gastonia Express	725	604	20.0%	5,382	3,862	39.4%	36	-	-
Rock Hill Express	818	494	65.6%	5,512	3,784	45.7%	41	-	-
Union County Express	592	514	15.2%	4,445	3,856	15.3%	30	-	-
Subtotal	2,135	1,612	32.4%	15,339	11,502	33.4%	107	-	
Community Circulator									
Neighborhood Shuttles	17,696	14,963	18.3%	104,973	81,977	28.1%	731	414	168
Eastland Neighborhood Shuttle	8,530	8,087	5.5%	57,206	48,752	17.3%	317	294	121

Metropolitan Transit Commission

Charlotte Area Transit System Ridership

Dec-23

Pineville-Matthews Road	1,523	1,662	-8.4%	13,648	9,371	45.6%	63	51	-
Village Rider	4,060	3,706	9.6%	28,256	23,250	21.5%	160	111	50
Subtotal	31,809	28,418	11.9%	204,083	163,350	24.9%	1,271	870	339
Human Services Transportation									
Special Transportation Services	13,611	14,483	-6.0%	90,833	90,694	0.2%	531	288	203
Subtotal	13,611	14,483	-6.0%	90,833	90,694	0.2%	531	288	203
Rideshare Services									
Vanpool	3,303	3,455	-4%	21,192	22,315	-5.0%	-	-	-
Subtotal	3,303	3,455	-4%	21,192	22,315	-5.0%	-	-	
Rail									
LYNX Blue Line	424,896	367,727	15.5%	2,931,393	2,535,177	15.6%	14,866	14,205	9,426
CityLynx Gold Line	37,198	42,020	-11.5%	275,851	290,251	-5.0%	1,385	1,034	720
Subtotal	462,094	409,747	12.8%	3,207,244	2,825,428	13.5%	16,251	15,239	10,146
Total	1,059,913	907,194	16.8%	7,095,734	5,862,993	21.0%	39,076	31,507	19,531

Metropolitan Transit Commission
Charlotte Area Transit System Ridership Report
Dec-23

Source:

Fixed Route Bus - Automatic Passenger Counts

Rail - Automatic Passenger Counts

Mode / Service	Dec-23	Dec-22	Percent Increase / Decrease	Average Daily Ridership		
				Weekday	Saturday	Sunday
Local						
BOD Local	671,834	615,038	9.2%	25,109	18,572	11,433
Subtotal	671,834	615,038	9.2%	25,109	18,572	11,433
Local Express						
Arboretum Express	795	437	82%	40	-	-
Harrisburg Road Express	1,222	986	23.9%	62	-	-
Northcross Express	2,626	2,524	4.0%	142	-	-
Idlewild Express	779	757	2.9%	42	-	-
Independence Blvd Express	1,658	1,634	1.5%	91	-	-
Lawyers Road Express	1,115	946	17.9%	56	-	-
Steele Creek Express	490	324	51%	26	-	-
Northlake Express	1,642	1,979	-17.1%	87	-	-
North Mecklenburg Express	3,825	3,601	6.2%	194	-	-
Huntersville Express	2,563	2,807	-8.7%	141	-	-
Rea Road Express	906	943	-4.0%	47	-	-
Mountain Island Express	275	609	-55%	15	-	-
Huntersville Greenhouse	121	115	6.0%	6	-	-
Subtotal	18,017	17,664	2.0%	948	-	-
Regional Express						
Gastonia Express	1,013	1,226	-17.4%	53	-	-
Rock Hill Express	843	756	11.6%	44	-	-
Union County Express	658	695	-5.4%	33	-	-

Subtotal	2,514	2,677	-6.1%	130	-	-
Community Circulator						
Neighborhood Shuttles	19,023	20,606	-7.7%	780	591	230
Eastland Neighborhood Shuttle	11,830	10,561	12.0%	416	407	209
Pineville-Matthews Road	2,218	2,465	-10.0%	90	98	-
Village Rider	6,324	6,415	-1.4%	233	199	114
Subtotal	39,396	40,047	-1.6%	1,518	1,084	554
Human Services Transportation						
Special Transportation Services	13,611	14,483	-6.0%	531	288	203
Subtotal	13,611	14,483	-6.0%	531	288	203
Rideshare Services						
Vanpool	3,303	3,455	-4.4%	140	35	40
Subtotal	3,303	3,455	-4.4%	140	35	40
Rail						
LYNX Blue Line	424,896	367,727	15.5%	14,866	14,205	9,426
CityLynx Gold Line	37,198	42,020	-11.5%	1,385	1,034	720
Subtotal	462,094	409,747	12.8%	16,251	15,239	10,146
Total	1,210,769	1,103,111	9.8%	44,627	35,219	22,376

Ridership Highlights Since January 2022

- Bus ridership has continued a steady increase since the Spring of 2022, with ridership in October 2023 being 43% higher than it was in January 2022
- Rail ridership has continued to grow throughout 2023, and has now doubled what it was in early 2022; many trips on Blue Line in the peak hour are now at capacity
- Special event ridership has contributed to the overall increases, with some special event days carrying more than 60% of the number of passengers compared with a normal day
- Ridership reflects a shift in hybrid work, with higher ridership occurring on Tuesday-Thursday, compared with Monday and Friday

November/December 2023 Missed Trips & Ridership Reports

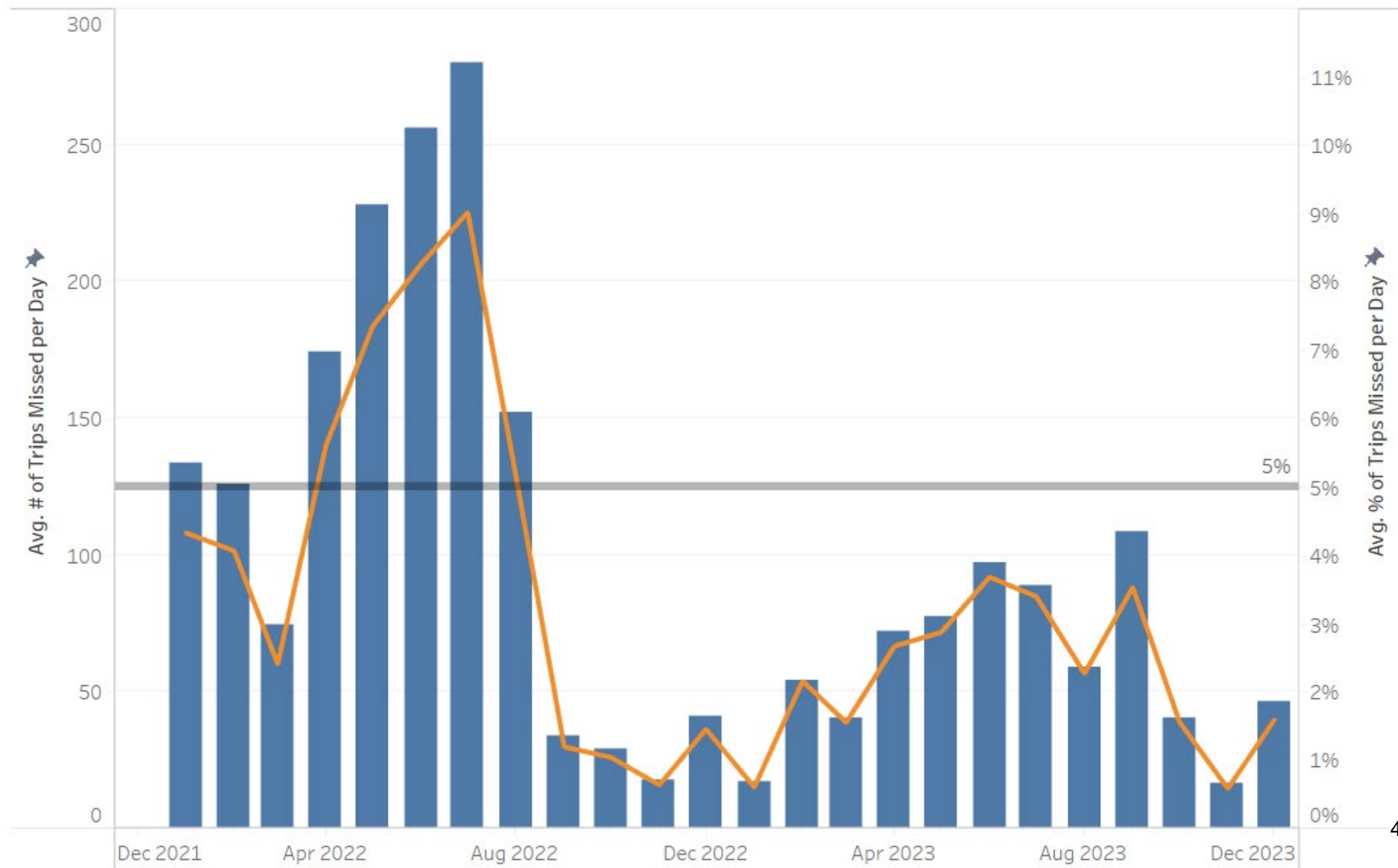
Bus Service Missed Trips Highlights

- Missed Trips in November continued to decrease since it's previous uptick in September 2023.
- December experienced a slight increase around the holidays but remain lower than recent averages.

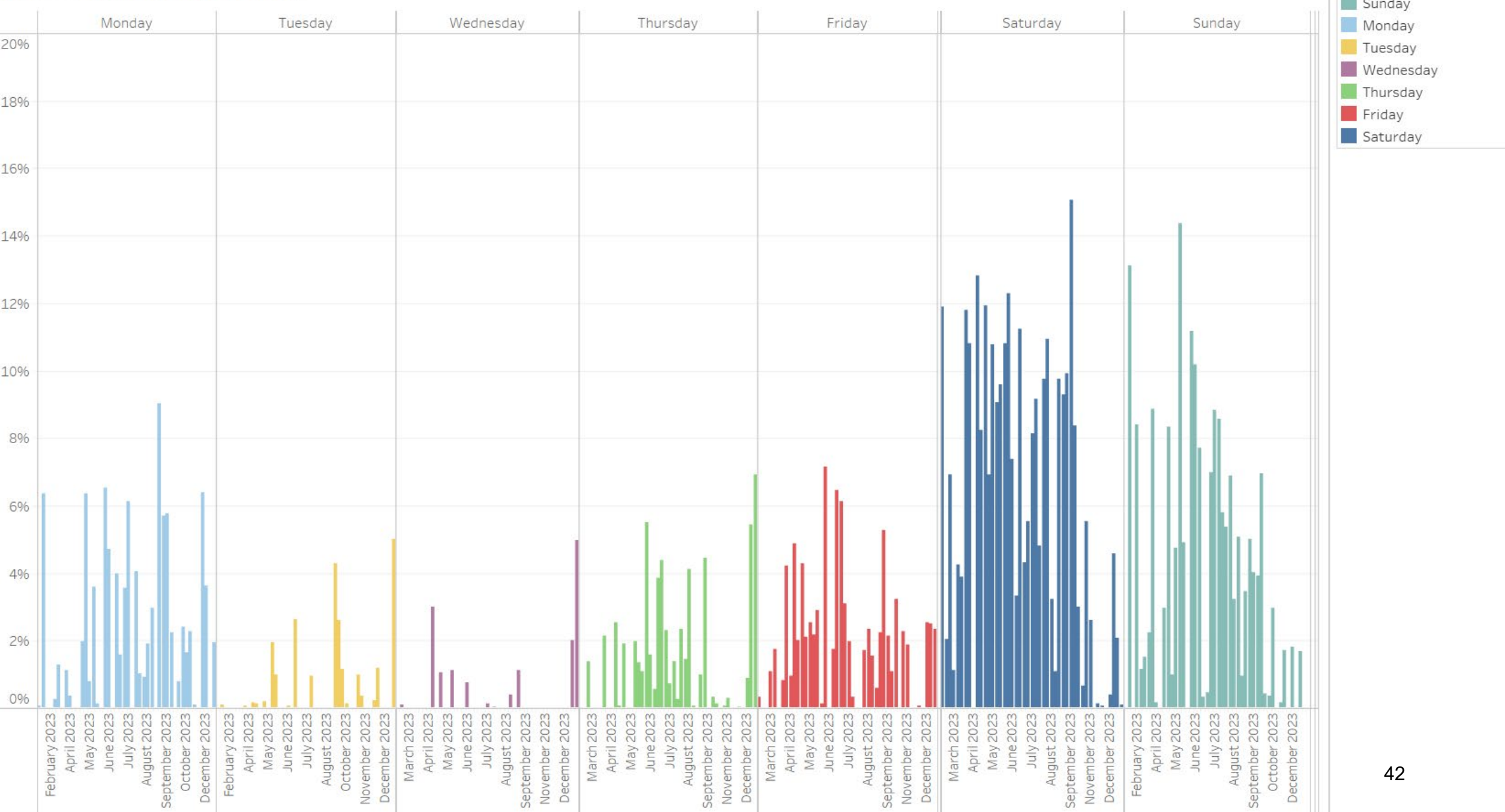
Ridership Highlights

- Overall ridership continued to increase during the months of November (12.8%) and December (9.8%).
 - In November, Local Routes were up 11.1%
 - In December, Local Routes were up 9.2%
 - Local Express Routes experienced an increase in ridership of 14.4% in November; 2.0% in December
 - Overall Rail ridership increased by 16.4% in November; 12.8% in December
 - Blue Line ridership increased 19.4% in November; 15.5% in December
 - Gold Line ridership decreased by 8% in November; 11.5% in December

Avg Missed Trips per Day



Missed Trips by Day of Week



From: [Hunter, Brandon](#)
To: [Cagle, Brent](#)
Subject: Recent Incident at CTC
Date: Wednesday, November 22, 2023 12:40:30 PM

Good afternoon MTC Mayor and Managers,

I hope this message finds you well. I am reaching out to inform you about an important matter. Later today, a video will be released related to an incident that occurred on Friday, November 17, 2023, at Charlotte Transportation Center LYNX Blue Line station, involving one of our contract security companies, Strategic Security Corp.

Incident Overview:

- Review of video shows the individual had spent several hours on the platform drinking from a bottle. Prior to security guards' interaction, the person fell off a bench, resulting in the detachment of their prosthetic leg.
- Upon arrival, the security guards discovered an individual on the ground who appeared highly intoxicated. This person had personal belonging stored in a cart and was accompanied by a small dog.
- After multiple attempts to communicate, the security team instructed the person to vacate the fare zone due lack to of a ticket.
- When the individual refused to comply, three security guards physically removed the individual and their belongings, relocating them to an area outside of the fare zone.
- Subsequently, the individual collected their belongings and left the platform.
- The manner in which the security guards handled the removal did not adhere to CATS standards or procedures, nor did it align with the contractor's guidelines.
- Upon review of the incident the contractor relieved the three guards of their duties and recommended their termination. Additionally, all guards who witnessed the incident faced disciplinary action and will undergo additional training. CATS supports and endorses the decisions made by the contractor.
- The appropriate protocol in this situation would have been for the security guards to approach the person and request medical assistance, and contact a member of the CATS Connect team to respond.

CATS Connect, is our pilot program within the CATS Security division. It serves as a solution-oriented outreach initiative aimed at individuals currently on the CATS system who may be in crisis due to issues such as mental illness, substance abuse or displacement. By involving CATS Connect, our goal is to ensure that individuals receive the necessary support and resources they may require during such situations.

I want to emphasize that the actions displayed by these security personnel do not reflect the values of CATS are completely again CATS' standards. We hold every interaction with our community in high regard and aim to treat all members with respect and dignity. The rapid action taken by CATS Security division in investigating this incident is a testament to our commitment to these values.

Video will be release to media who requested it this afternoon. Please feel free to reach out with any

questions or for additional information. We are here to assist and provide support.

Thank you for your attention to this matter. Together, we remain dedicated to ensuring our employees and community members are served with the utmost respect and safety.

Brandon T. Hunter (he/him/his)

Director, Communications

Charlotte Area Transit System

Mobile (704) 621-8343 | brandon.hunter@charlottenc.gov

CATS Media Line (980) 722-0311

600 East 4th Street | Charlotte, NC 28202

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From: [Hunter, Brandon](#)
To: [Cagle, Brent](#)
Subject: Remembering Mayor Reid
Date: Tuesday, December 5, 2023 4:55:36 PM

Dear MTC Board Members,

I hope this message finds you in good health.

We are all deeply saddened by the news of Mayor Reid's passing. As a mark of our respect and sympathy, we have sent flowers to Mayor Reid's family on behalf of the MTC Board and CATS. Mayor Reid was a highly respected individual who worked tirelessly alongside each of us. His dedication and service have left an indelible mark on our community.

During this difficult time, our thoughts and prayers are with his family and friends. We are grateful for the opportunity to have known and worked with Mayor Reid, and we honor his memory.

Thank you for your support and understanding.

Brandon T. Hunter (he/him/his)

Director, Communications

Charlotte Area Transit System

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From: [Hunter, Brandon](#)
To: [Cagle, Brent](#)
Subject: Urgent Update: Incident Involving Bus 1065 on Lasalle Road
Date: Friday, December 22, 2023 6:05:19 PM

Dear MTC Mayors and Managers,

I hope this message finds you well. We are writing to inform you of a serious incident that occurred this afternoon, shortly after 4:00 p.m., involving a CATS bus.

The incident occurred on Lasalle Road, on Route 3. During this event, the bus operator was tragically struck by a stray bullet, which was a result of a conflict between individuals in two separate vehicles unrelated to the bus. Fortunately, no passengers were injured in this incident. However, the bus operator is in stable condition at the hospital. A bus supervisor is presently at the hospital, offering support to the operator and gathering more information about their condition.

The Charlotte Mecklenburg Police Department's initial investigation suggests that this was an isolated incident, and it appears that the bus and its occupants were not the intended targets. We are actively working with law enforcement to support their ongoing investigation into this matter. We will continue to provide additional updates as more information becomes available.

We fully recognize the seriousness of this situation and are dedicated to ensuring the safety of all bus operators and passengers. Our thoughts are with the injured operator and their family during this challenging time. Your support and understanding are invaluable as we manage the aftermath of this unfortunate incident.

Brandon T. Hunter (he/him/his)

Director, Communications

Charlotte Area Transit System

Mobile **(704) 621-8343** | brandon.hunter@charlottenc.gov

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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](#); [Jones, Marcus](#); [Diorio, Dena R.](#); [cmud_a grant](#); [jjustice@ci.davidson.nc.us](#); [cmud_a roberts](#); [Becky Hawke](#); [cmud_b welch](#); [rspitzer@pineville.gov](#); [Johnson, Victoria](#); [Lawrence, Jason](#); [Goforth, Kelly](#); [Presutti, Elizabeth](#); [Howell, Chad](#); [CATS PR](#); [Baldeck, Brett](#); [Moskowitz, David](#); [bot-tlathrop1@ncdot.gov](#); [Kunze, Emily](#); [Ford, Paulus](#)
Subject: CATS Storm Preparedness and Operations
Date: Tuesday, January 9, 2024 11:39:07 AM

MTC,

As we brace for the approaching storm, we wanted to provide you with an update on our preparedness and response efforts.

This morning, the Emergency Operations Center (EOC) was activated in response to the forecasted severe weather conditions. CATS has ensured representation at the EOC to guarantee real-time communication and coordination of our operations. Our priority is to keep our services running smoothly while ensuring the safety of our passengers and staff.

We have taken several proactive measures to mitigate potential disruptions:

- CATS is fully staffed and prepared to respond swiftly to any emergent situations.
- We have contingency plans for bus detours, primarily to address potential obstructions caused by downed trees and limbs.
- Additional buses are on standby, ready to be deployed as needed by the EOC.
- We are actively monitoring our stations for flooding risks and have prepared appropriate response measures.

At present, we do not anticipate any significant service impacts due to wind conditions. However, we remain vigilant and are continuously monitoring the situation. Should there be any sustained high winds, we are prepared to make necessary alterations or even suspend bus/rail services if required to ensure safety.

We will keep you all updated on any major developments. Your support and understanding in these efforts to maintain safe and reliable service during this challenging time are greatly appreciated.

Thank you,

Brandon T. Hunter (he/him/his)

Director, Communications

Charlotte Area Transit System

Mobile (704) 621-8343 | brandon.hunter@charlottenc.gov

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From: [Hunter, Brandon](#)
To: [Cagle, Brent](#)
Subject: CATS Update
Date: Sunday, January 7, 2024 7:23:44 PM
Attachments: [NCDOT SSO Ltr - Directive-LRVs Removal From Service Incident No.189026 1-6-24.pdf](#)

MTC,

We hope this message finds you all well. We are writing to keep you updated on a recent correspondence we received from the North Carolina Department of Transportation (NCDOT).

On January 4, 2024, a flat spot was reported on one wheel of a 100-series C truck, the middle section of a LYNX Blue Line train to CATS rail maintenance. It's important to note that flat spots on wheels are routine; flat spots are measured in millimeters (the width of a dime or quarter) and are repaired (trued) as part of regular maintenance.

CATS staff is conducting a root cause investigation, and at this time, we do not believe this is related to the previously identified issues with the truck bearings, as the heat strips were in acceptable ranges and the wheels and bearings were spinning freely.

CATS Safety division informed NCDOT of the issue, which is standard procedure, on Saturday afternoon. Saturday evening CATS received a letter from NCDOT directing CATS to remove all 100 and 200 series trucks from service that have not completed bearing maintenance (communication attached). They can return to service when the wheel bearing maintenance is complete. CATS complied with NCDOT's directive.

CATS has completed an inspection of all wheels on C trucks of 100 and 200 series vehicles on Sunday and no other issues were identified. CATS staff is in the process of inspecting all wheels of trucks in the 300 series trains as a precaution.

The NCDOT directive to remove 100 and 200 series vehicles from service that have not been updated until the current maintenance is completed impacts approximately half of LYNX Blue Line trains. It is important to point out that the 100 and 200 series vehicles are already undergoing the needed maintenance and NCDOT directive is for CATS to continue the current plan. CATS has enough 300 series vehicles to maintain the current LYNX Blue Line service schedule. At this time there are no known service impacts.

This weekend, CATS staff was in contact with Siemens, who is providing the vehicle's maintenance, and Siemens has informed CATS it can expedite the current maintenance schedule.

Key Takeaways:

- This issue is one wheel on the center truck. Trains have been inspected, and there are no safety concerns.
- There is no indication that there is any relation to the previously identified wheel bearing issue.
- There will not be any impact on regular LYNX Blue Line service at this time. There may need to be adjustments in the future depending on the maintenance schedule.
- Siemens can expedite the maintenance schedule. It currently takes 6-8 weeks to complete maintenance (travel time plus actual maintenance).

Statement from Brent Cagle:

"This is an exemplary demonstration of a system that truly works," said CATS Interim CEO Brent Cagle. "Staff proactively collaborated across various divisions to address the mechanical concerns, ensuring these were promptly reported to NCDOT. This is a testament to our collective effort to uphold our commitment to safety for our employees and passengers. This incident also highlights that the correct reporting processes are in place. It's a clear reflection of our dedication to operational excellence and safety."

Flat Spots

Flat spots are small imperfections on train wheels typically measured in millimeters (the width of a dime or quarter). They are normal wear/tear on train wheels and are part of standard train maintenance. Train operators are trained to identify the clicking sound made by flat spots and then report that to staff for repair, which is called "truing". That is what happened in this case and is standard procedure. The oddity is that the same wheel had another flat spot within a week, which is why the truck was removed from service for further evaluation. Flat spots do not impact train performance and are not a safety issue.

Timeline

- The wheel with the flat spot was repaired (trued) late December and passed its safety inspection. On Friday a train operator reported hearing a clicking sound and the truck was taken out of service for further evaluation. CATS Safety division reported the issue to NCDOT on Saturday.
- Saturday evening, CATS received a letter from NCDOT directing CATS to remove all 100 and 200 series trucks from service until current wheel bearing maintenance was complete. CATS complied with NCDOT's directive.
- CATS staff immediately inspected the wheels of all C trucks in the 100 and 200 series vehicles in service and have not found any other issues with the wheels.
- CATS informed city leadership, City Council and the MTC on Sunday.

Info on 100/200 series maintenance

- Currently, a complete overhaul of one car set is underway at Siemens in Sacramento.
- Another full overhaul car set is at ORX Pennsylvania, undergoing a spin test.

- A car set with a limited scope is being serviced at Brightline Florida.
- CATS is preparing two car sets for dispatch to a repair facility.
- CATS anticipate the return of one full car set, under limited scope maintenance, in February.

Brandon T. Hunter (he/him/his)

Director, Communications

Charlotte Area Transit System

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CATS Media Line **(980) 722-0311**

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Connect with CATS: [Website](#) | [Facebook](#) | [X](#) | [Instagram](#) | [YouTube](#) | [LinkedIn](#) | [Flickr](#)



STATE OF NORTH CAROLINA
DEPARTMENT OF TRANSPORTATION

ROY COOPER
GOVERNOR

J.R. "JOEY" HOPKINS
SECRETARY

January 6, 2024

Mr. Brent Cagle
Interim Chief Executive Officer, Charlotte Area Transit System
Assistant City Manager, City of Charlotte
600 E. 4th Street, CMGC - 7th Floor
Charlotte, NC 28202

Subject: NCDOT Directive: Removal of Light Rail Vehicles From Service

Mr. Cagle:

The North Carolina Department of Transportation (NCDOT) State Safety Oversight (SSO) Program has reviewed a copy of the Light Rail Vehicle (LRV) #113 Incident Report, submitted by the Charlotte Area Transit System (CATS) on January 6, 2024.

Incident Description: On the morning of January 4, 2024, while in service, the operator reported to the ROCC that after departing I-485 (northbound) operating from LRV113 that they believed that they had flat spots on LRV113. The operator also stated that they did not observe anything out of the ordinary on their previous northbound trip. RCM boarded LRV113 and verified the flat spots. LRV113 was taken out of service and was taken back to the yard for further inspection. The C truck wheels were trued December 30, 2023. These wheels were trued again, following this incident, to remove the flat spot. While on the wheel truing machine, the machinist noticed an abnormal sound coming from the center truck. The LRV was moved to another shop track away from the wheel truing machine and was inspected further. The further inspection determined that there was abnormal movement with the 4L wheel of LRV113.

Root Cause(s): Rail maintenance has determined that excessive wheel play is the root cause of the flat spots in this incident. The same tenured machinist performed the wheel cuts in both incidents and immediately reported his concerns to his supervisor following protocol. The determinations made thus far are not definitive or conclusive without the vendor completing a root cause analysis on the axle.

Corrective Actions To Date:

- 1/4/24: Work Order #649732 was created to further investigate RCM's initial findings.
- 1/4/24: As a preventive measure, RCM revised its procedure involving post wheel truing process. The revised procedure will include a check for abnormal movement/excessive wheel play during the wheel bearing inspection following wheel truing.

Mailing Address:
NC DEPARTMENT OF TRANSPORTATION
RAIL DIVISION
1556 MAIL SERVICE CENTER
RALEIGH, NC 27699-1556

Telephone: (919) 707-4100
Fax: (919) 707-4154
Customer Service: 1-877-368-4968
Website: www.ncdot.gov
www.ncbytrain.org

Location:
862 CAPITAL BLVD
RALEIGH, NC 27603

- 1/4/24: RCM initiated a process of inspecting the center trucks of the entire fleet to ensure no other wheel sets currently have any abnormal movement/excessive wheel play. The inspection of the CATS 1's and 2's will be complete by the end of this weekend. The CATS 3's will be completed within the next couple of weeks.
- 1/6/24: CATS notified NCDOT of this incident, via email, at 3:37pm
- 1/6/24: NCDOT personnel reviewed the report and facilitated phone calls with CATS' Rail Car Maintenance Manager and General Manager of Operations at 3:51pm.

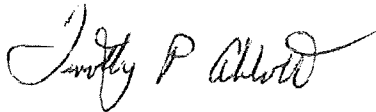
According to the email received from CATS on 1/6/24, RCM is also currently working on a plan to only provide revenue service using the CATS 3 fleet and the CATS 1's or 2's that have had the limited scope overhaul. All other LRV's will only be used as spares. This plan should be enacted by the end of the week.

Based on this most recent incident, **NCDOT hereby directs CATS to immediately remove from service and Blue Tag all light rail vehicles having overdue maintenance overhaul work associated with it.** These vehicles shall not be utilized in revenue service, for any reason until a Limited Scope overhaul, at a minimum, has been completed.

Additionally, NCDOT requests written confirmation, via email, that this Directive has been implemented tonight and all affected LRVs are Blue Tagged and disabled, per CATS' ROD506-Rail Vehicle Blue Flag/Blue Light Protection plan.

If you have any questions, please contact me at 919-707-4149.

Regards,



Timothy P. Abbott
Safety Enforcement and Oversight Manager
SSO Program Manager
Rail Division
North Carolina Department of Transportation

Cc: Chad Hagans, CATS
David Moskowitz, CATS
Gary Lee, CATS
Robert Hudgins, CATS
Jahmal Pullen, NCDOT
Don Pike, NCDOT Contractor
Jerrad Jones, NCDOT Contractor

December| CATS Sales Tax Report FY2024

September Receipts

Sales Tax Collections and Distribution – September 2023

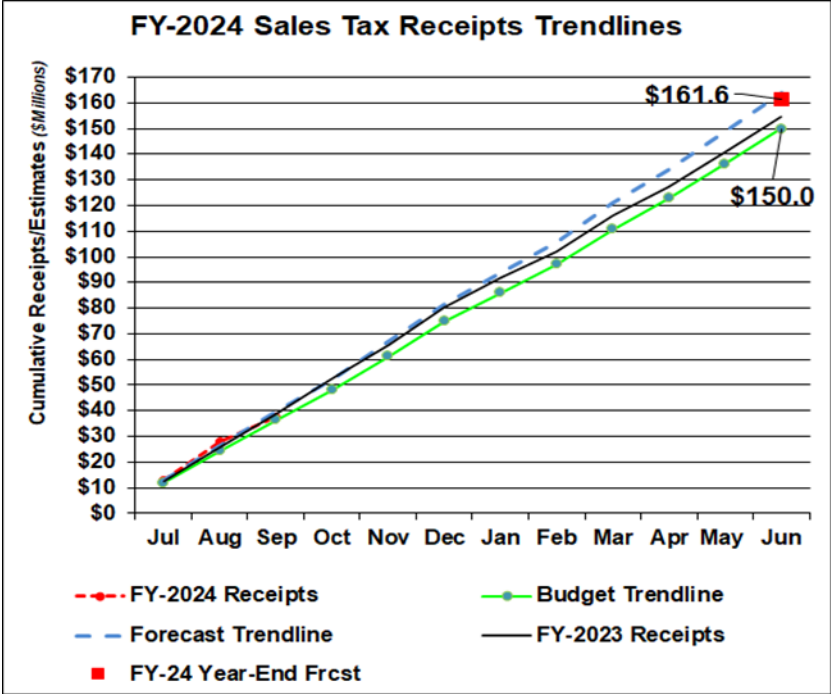
- The September 2023 receipts of \$9,765,503 were (\$2,384,497) (-19.6%) below budget target for the month
- The September 2023 receipts were (\$3,498,247) (-26.4%) below forecast for the month
- The September 2023 receipts were (\$3,762,643) (-27.8%) below September of 2022

Sales Tax Budget Data

- FY2024 sales tax budget is \$150,000,000
- The FY24 model forecasts year-end receipts of \$161,554,019 is \$11,554,019 (7.7%) above the FY-2024 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 October 31, 2023
- Published by NC Secretary of Revenue on December 12, 2023 with actual receipts through September 30, 2023
- CATS sales tax report only includes Mecklenburg County Article 43 sales tax



January| CATS Sales TaxReport FY2024

October Receipts

Sales Tax Collections and Distribution – October 2023

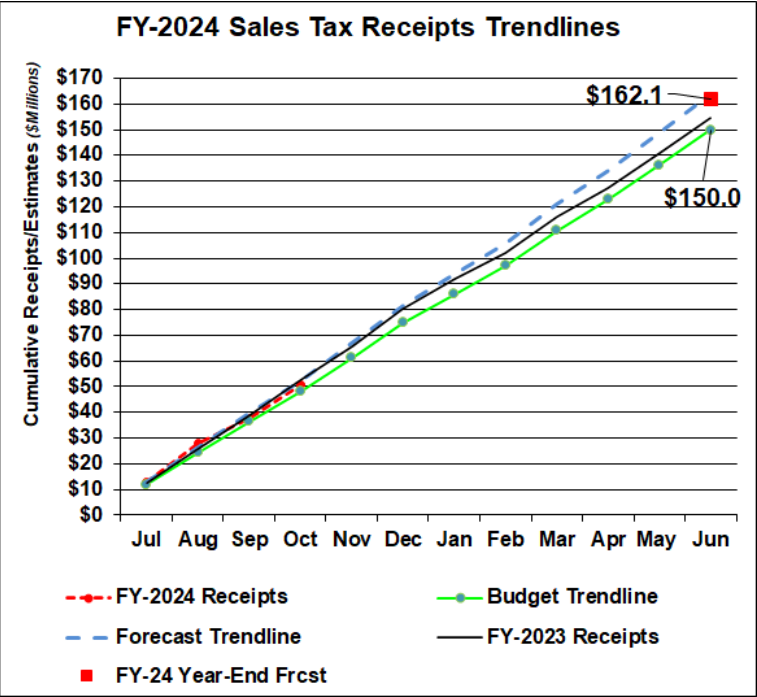
- The October 2023 receipts of \$13,164,891 were \$1,599,891 (13.8%) above budget target for the month
- The October 2023 receipts were \$539,766 (4.3%) above forecast for the month
- The October 2023 receipts were (\$118,169) (-9.%) below October of 2022

Sales Tax Budget Data

- FY2024 sales tax budget is \$150,000,000
- The FY24 model forecasts year-end receipts of \$162,093,785 is \$12,093,785 (8.06%) above the FY-2024 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 November 30, 2023
- Published by NC Secretary of Revenue on January 10, 2024 with actual receipts through October 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 Forecasts	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%	\$ 5,285,636	\$ 5,967,538	\$ 3,941,736	\$ 5,313,861	\$ 5,789,997	\$ 6,021,332	\$ 4,884,484	\$ 4,897,703	\$ 6,008,113	\$ 5,433,079	\$ 5,836,264	\$ 6,067,599	\$ 65,427,340
Cornelius	31,872	1.4%	\$ 187,544	\$ 212,543	\$ 140,391	\$ 189,261	\$ 206,219	\$ 214,459	\$ 173,968	\$ 174,439	\$ 213,988	\$ 193,507	\$ 207,867	\$ 216,107	\$ 2,330,293
Davidson	15,066	0.7%	\$ 88,652	\$ 100,470	\$ 66,363	\$ 89,464	\$ 97,481	\$ 101,375	\$ 82,235	\$ 82,458	\$ 101,153	\$ 91,472	\$ 98,260	\$ 102,154	\$ 1,101,537
Huntersville	63,355	2.9%	\$ 372,798	\$ 422,492	\$ 279,068	\$ 376,212	\$ 409,922	\$ 426,300	\$ 345,813	\$ 346,749	\$ 425,364	\$ 384,653	\$ 413,198	\$ 429,576	\$ 4,632,145
Matthews	30,156	1.4%	\$ 177,446	\$ 201,099	\$ 132,832	\$ 179,071	\$ 195,117	\$ 202,912	\$ 164,602	\$ 165,047	\$ 202,467	\$ 183,089	\$ 196,676	\$ 204,471	\$ 2,204,829
Mint Hill	26,971	1.2%	\$ 158,705	\$ 179,860	\$ 118,803	\$ 160,158	\$ 174,509	\$ 181,481	\$ 147,217	\$ 147,615	\$ 181,083	\$ 163,751	\$ 175,903	\$ 182,876	\$ 1,971,961
Pineville	10,931	0.5%	\$ 64,321	\$ 72,895	\$ 48,149	\$ 64,910	\$ 70,726	\$ 73,552	\$ 59,685	\$ 59,827	\$ 73,391	\$ 66,366	\$ 71,291	\$ 74,117	\$ 799,210
Stallings	385	0.0%	\$ 2,265	\$ 2,567	\$ 1,696	\$ 2,286	\$ 2,491	\$ 2,591	\$ 2,101	\$ 2,107	\$ 2,585	\$ 2,337	\$ 2,511	\$ 2,610	\$ 28,149
Weddington	5	0.0%	\$ 29	\$ 33	\$ 22	\$ 30	\$ 32	\$ 34	\$ 27	\$ 27	\$ 34	\$ 30	\$ 33	\$ 34	\$ 366
Meck. County	1,143,390	51.6%	\$ 6,728,019	\$ 7,624,854	\$ 5,036,443	\$ 6,789,637	\$ 7,398,006	\$ 7,693,589	\$ 6,241,012	\$ 6,257,903	\$ 7,676,698	\$ 6,941,965	\$ 7,457,123	\$ 7,752,705	\$ 83,597,954
Total	2,216,997	100.0%	\$ 13,045,415	\$ 14,784,351	\$ 9,765,503	\$ 13,164,891	\$ 14,344,500	\$ 14,917,625	\$ 12,101,125	\$ 12,133,875	\$ 14,884,875	\$ 13,460,250	\$ 14,459,125	\$ 15,032,250	\$ 162,093,785

*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%	18.4%	10.5%	18.4%	45.9%	11.5%	18.4%	11.8%	15.2%	16.4%
FY2024 Budget Target	\$ 11,940,067	\$ 12,364,727	\$ 12,147,601	\$ 11,553,920	\$ 13,138,368	\$ 13,665,113	\$ 11,084,991	\$ 11,117,138	\$ 13,635,340	\$ 12,329,125	\$ 13,247,740	\$ 13,775,870	\$ 150,000,000
% of FY2024 Budget Achieved	8.7%	18.6%	25.1%	33.8%	43.4%	53.3%	61.4%	69.5%	79.4%	88.4%	98.0%	108.1%	108.1%

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	\$ 6,833,896	\$ 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



Jan-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. - MTC notified on August 29, 2023
	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.



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

Issue 3: Bridge and Parking Deck Inspections	Inspections	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. CATS is working to coordinate a schedule of flagging with these entities to inspect the remaining 6 bridges. Anticipated completion of field work is currently Q4 2023. - As of January 10th, no new inspections have been performed due to delay in NS/RailPros providing flagging coordination and track access. However, flagging operations have been approved, and inspections on the remaining structures are expected to begin on January 15th, 2024. Field work for all structures is expected to conclude by January 31st, 2024. <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. Engineers are working to determine necessary repairs. - No critical issues found at the other decks.
	3.3: Inspections	
	3.4: Next Steps	<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).
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> <p>- UPDATE: CATS' Senior Leadership is meeting monthly - Conversation Station - with small groups of employees providing a direct avenue for communication with senior leadership.</p>
	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	



Jan-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 Deva 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 IJJA 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: CEO Recommended
FY2025 Preliminary Operating and Debt Service Budget
FY2025-2029 Preliminary Capital Investment Plan**

DATE: January 24, 2024

1.0 PURPOSE/SCOPE: This item advises that the Chief Executive Officer will present CATS' FY2025 Preliminary Operating and Debt Service Budgets, and the FY2025-2029 Preliminary Capital Investment Plan (CIP) to the Metropolitan Transit Commission on January 24, 2024.

2.0 BACKGROUND/JUSTIFICATION: CATS' FY2025 Preliminary Operating and Debt Service Budgets and the FY2025-2029 Preliminary Capital Investment Plan (CIP) will be presented in compliance with the Transit Governance Interlocal Agreement. The balanced budgets are being developed in compliance with CATS' Financial Policy guidelines and objectives.

The FY 2025 Preliminary Operating and Debt Service Budgets and the FY 2025-2029 Capital Investment Plan will align with CATS' strategic priorities.

3.0 PROCUREMENT BACKGROUND: N/A

4.0 POLICY IMPACT: The recommended FY2025 Preliminary Operating and Debt Service Budget and FY2025-2029 Preliminary Capital Investment Plan (CIP) is being developed in compliance with the following MTC Policy directives:

- A. CATS Mission, Vision and Strategic Goals
- B. CATS Financial Policies (Rev. 2016)
- C. The 2030 Transit Corridor System Plan
- D. CATS Service and Fare Policies

5.0 ECONOMIC IMPACT: N/A

6.0 ALTERNATIVES: N/A

7.0 RECOMMENDATION: N/A

8.0 ATTACHMENT(S):

- A. FY2025 Preliminary Operating and Debt Service Budget
- B. FY2025-FY2029 Preliminary Capital Investment Plan

SUBMITTED AND RECOMMENDED BY:



Brent Cagle
Interim Chief Executive Officer, Charlotte Area Transit System
Interim Director of Public Transit, City of Charlotte

FY 2025 Operating & FY 2025 – FY 2029 Capital Improvement Plan

Presentation to Metropolitan Transit Commission
January 24, 2024



Agenda

- ▶ **FY 2025 Process**
- ▶ **FY 2023 Year-End**
- ▶ **FY 2024 Mid-Year**
- ▶ **FY 2025 Strategic Outlook and Priorities**
- ▶ **FY 2025 Budget Calendar**
- ▶ **Questions**



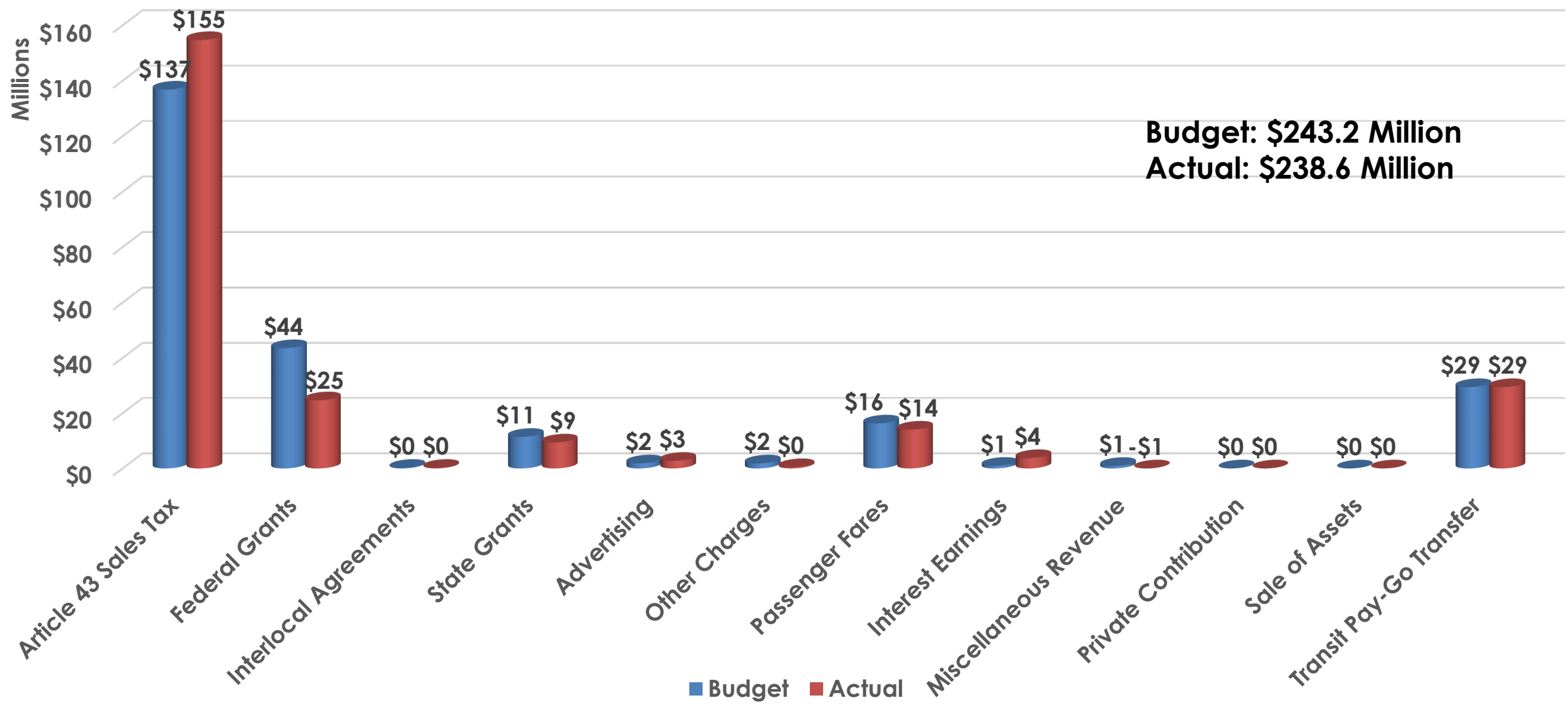
FY 2025 Budget Process

- ▶ **CATS Leadership and Staff develop preliminary operating and capital projections**
- ▶ **Preliminary projections developed with a focus on departmental operating priorities and available funding**
- ▶ **Metropolitan Transit Commission Budget Workshops**
 - ▷ Preliminary FY 2025 Operating Budget presented to MTC for alignment with MTC Priorities
 - ▷ Preliminary FY 2025 – FY 2029 Capital Budget presented to MTC for alignment with MTC Priorities
- ▶ **Final Operating and Capital Budgets presented to MTC for adoption and recommendation to Charlotte City Council**

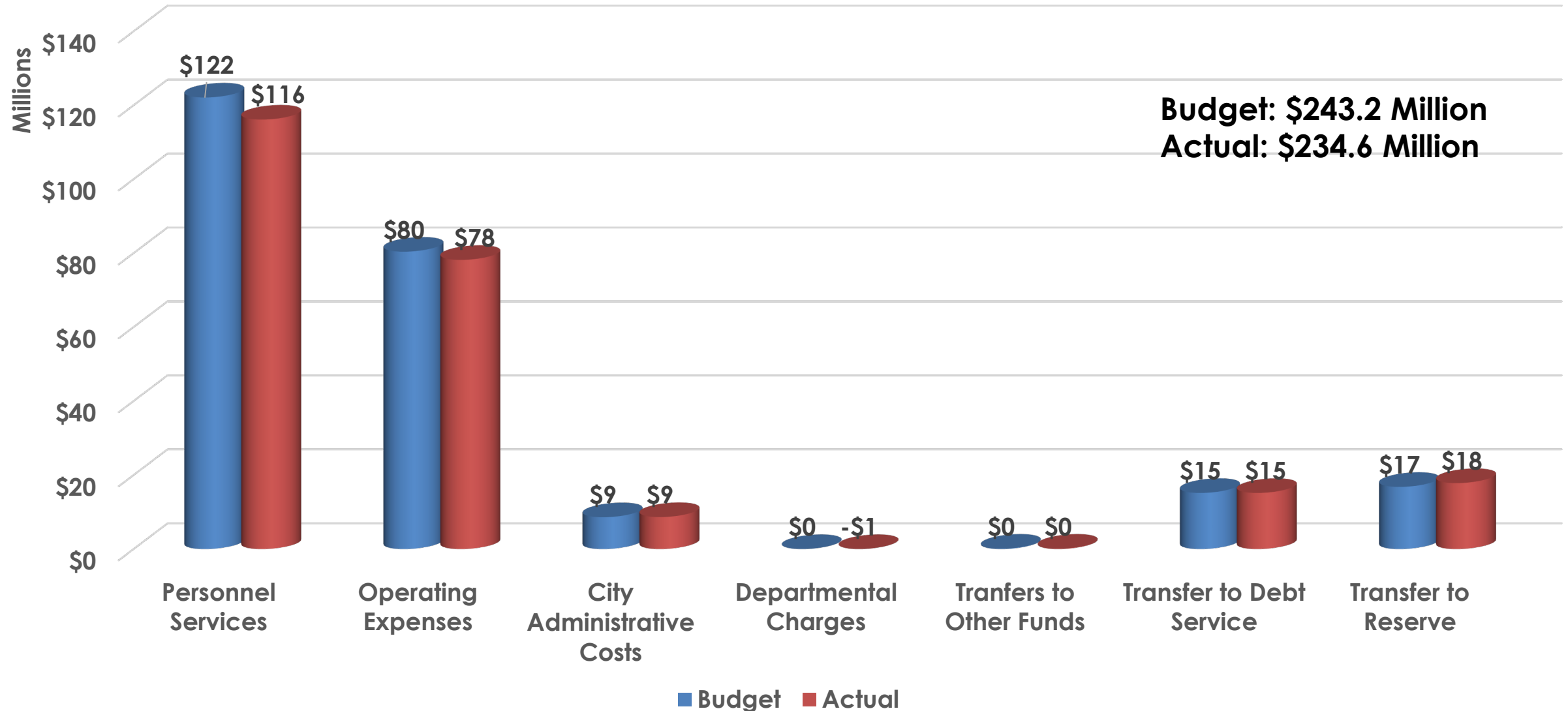
FY 2023 Year-End Summary



FY 2023 Actual Operating Revenues



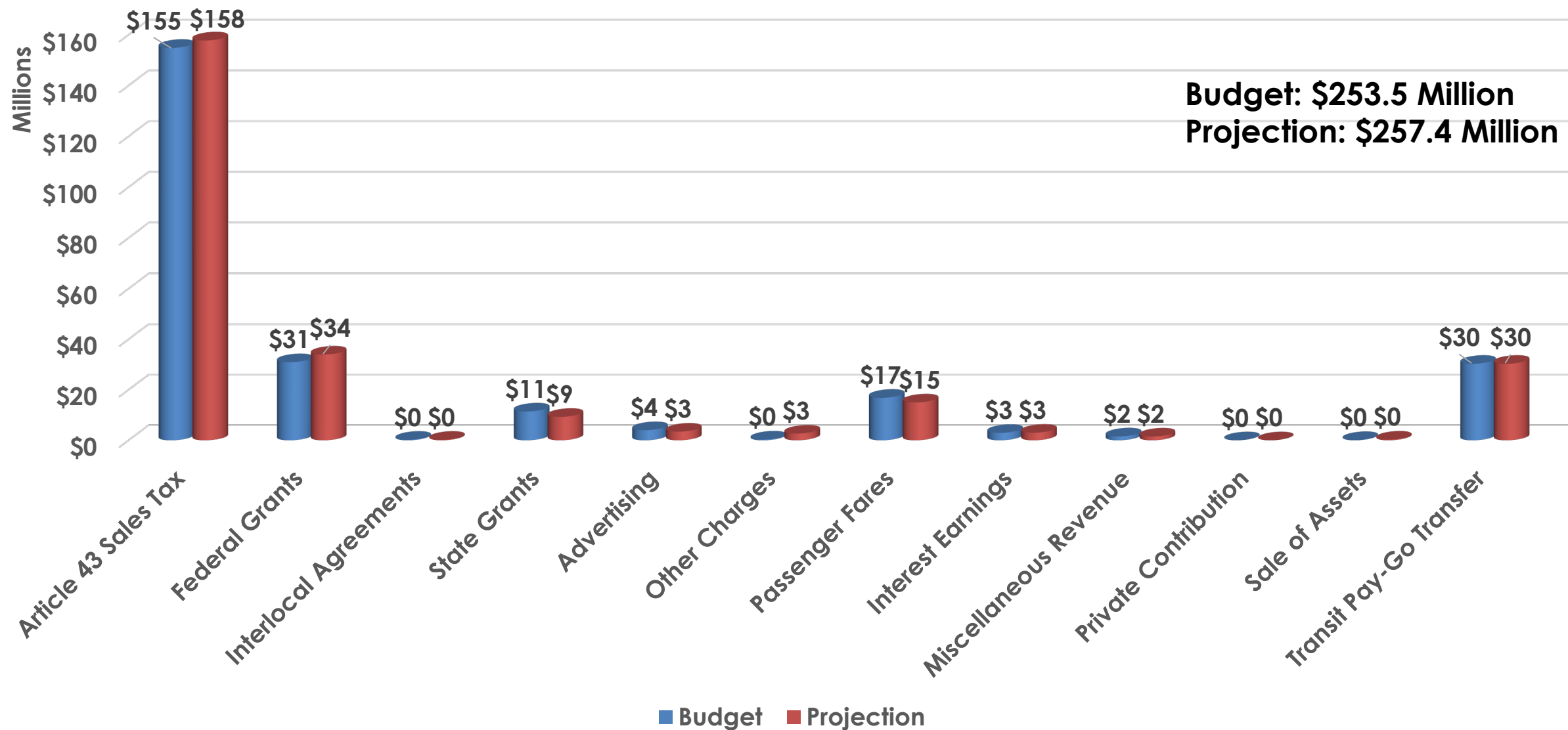
FY 23 Actual Operating Expenditures



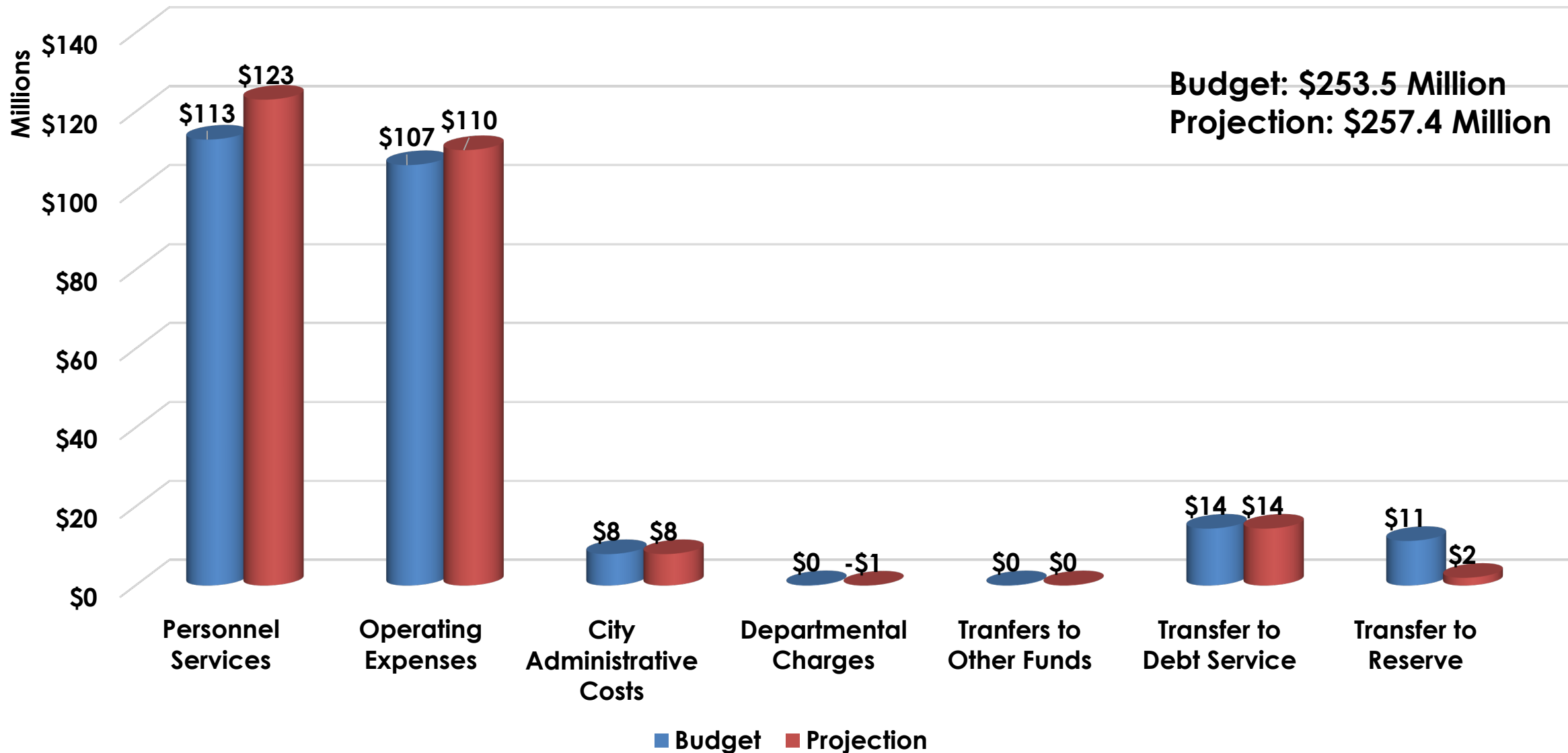
FY 2024 Mid-Year Projection



FY 2024 Projected Operating Revenues



FY 2024 Projected Operating Expenditures



FY 2025 Strategic Outlook & Priorities



FY 2025 Preliminary Revenue Outlook

▶ Sales Tax Outlook

- ▷ Projecting an approximately 3% annual growth
- ▷ Working with the City's Economist to refine this projection

▶ Passenger Fares

- ▷ Projecting revenues to remain relatively flat from FY 2024
- ▷ No projected increase in fares

▶ Federal & State Grants

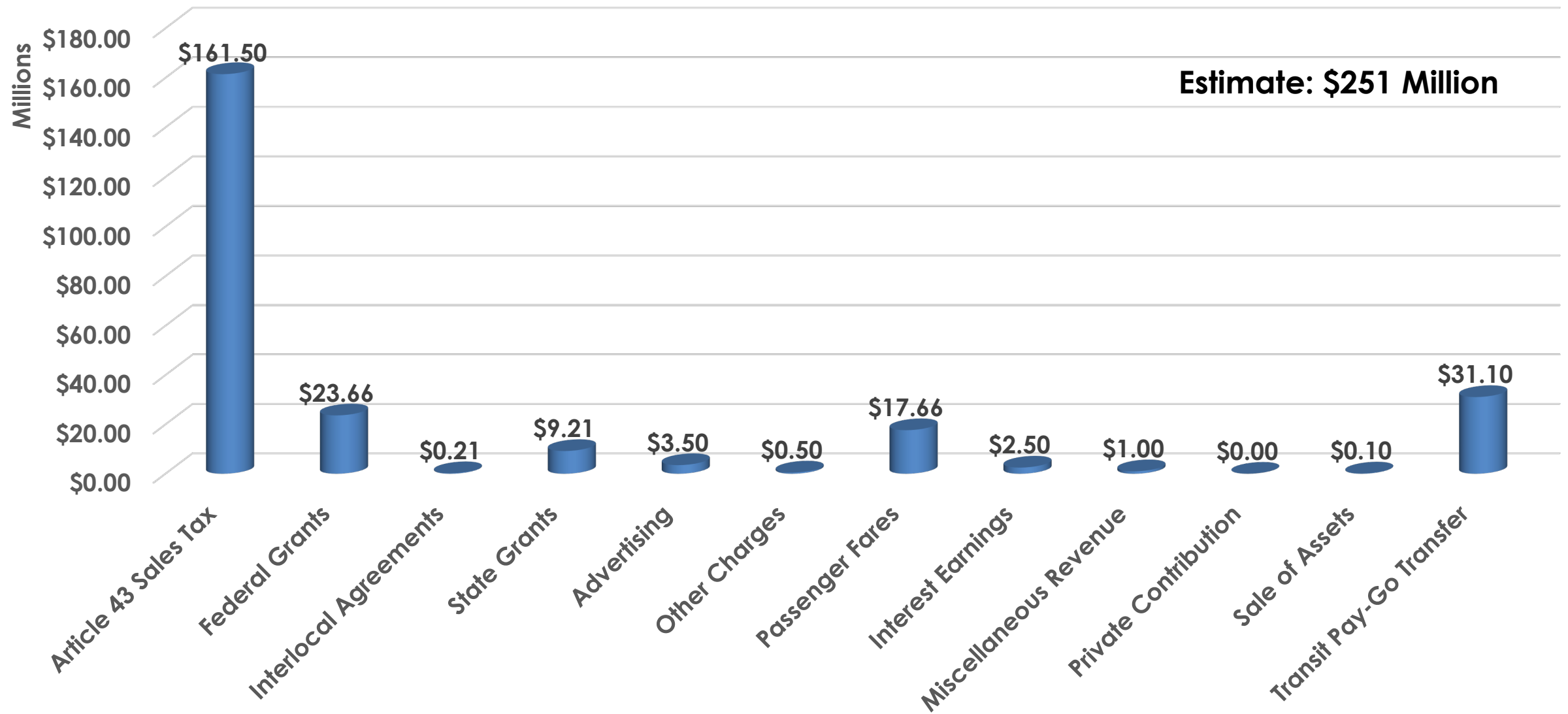
- ▷ Align new grants with strategic priorities and finalize estimated proceeds
- ▷ Research existing grants for alignment or realignment opportunities

▶ Strategic Utilization of Reserve Funds

▶ Financial Safeguards

- ▷ Unrestricted Fund Balance \geq \$100 Million
- ▷ Revenue Reserve Fund Balance = \$30 Million
- ▷ Financial Performance Objectives

FY 2025 Preliminary Revenue Outlook – Cont.





Our Mission

MOVING PEOPLE FORWARD. >>

Vision Statement

To create a seamless transit experience that improves the lives of individuals, fuels economic growth, builds a connected region and fosters a sustainable future for all.

FY25 STRATEGIC PRIORITIES

1. Organizational Resilience
2. Employee Success
3. Future-Forward Planning and Innovation
4. Exceptional Customer Experience
5. Positive Community Impact

Core Values



Safety



Employee
Centric



Customer
Focused



Equity &
Inclusion



Innovation



Sustainability



Excellence



FY 2025 Budget Calendar

► August 2023 – December 2023

- ▷ CATS Finance and Development work with departmental staff, City Strategy & Budget, and City Finance to develop preliminary operating and capital revenue and expenditure projections.
- ▷ Preliminary projections are developed with a focus on departmental operating priorities
- ▷ Priorities are aligned with available funding
- ▷ Incorporated in Financial Model

► January 2024

- ▷ CATS Senior Leadership Team Workshop
- ▷ Final alignment with FY 2025 operating priorities
- ▷ Work with City Finance on debt issuance strategy
- ▷ Presentation to MTC

► February 2024

- ▷ MTC Operating Budget Workshop
- ▷ Workshop results incorporated into preliminary operating budget

► March 2024

- ▷ MTC Capital Budget Workshop
- ▷ Finalize revenue and expenditure projections
- ▷ Workshop results incorporated into preliminary capital budget

► April – June 2024

- ▷ Revise budget and present to MTC and City Council for adoption

An aerial photograph of a city skyline, likely Atlanta, Georgia. The foreground features a multi-lane highway interchange with several cars visible. Beyond the highway is a large, grassy area. The middle ground is filled with various city buildings, including a prominent, tall, modern skyscraper on the left. The background shows a dense cluster of high-rise buildings under a sky with scattered clouds.

Questions