WMATA CTB Policy Review

Commonwealth Transportation Board

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September 15, 2026

DRPT
VIRGINIA DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION



WMATA Policy Change Briefing

- No action by CTB on WMATA policies at September meeting
- DRPT will seek CTB approval on policy changes regarding WMATA that will start in FY27 at the October CTB meeting



Background

- Original *Policy and Guidelines for Implementation of Governance and Funding Reforms for WMATA* (CTB Policy) adopted September 18, 2018, tied to Dedicated Funding legislation.
- Requirement: *Given that the condition of the WMATA system may change over time, the CTB will consider revisions and/or updates to these guidelines at least every two years.*
- Policy changes to date:
  - 2021
    - Reflect changes to Code from 2020 session
    - Consider revisions and/or updates to these guidelines **at least** every two years
    - Technical corrections/clarifications
  - 2023
    - Reflect changes to Code from 2023 session
    - Minor clarifications resulting from start of Phase 2 of Silver Line
  - 2025
    - No changes recommended due to the then-pending SJ28 and DMVMoves work
- **2026: Governor Spanberger and General Assembly included additional oversight requirements in the Biennial Budget necessitating a change to the Board policy**

Current CTB WMATA Policy Scope

- Establishes July 1 deadline for WMATA to submit documentation asserting compliance with Code requirements.
- Provides clarification for certain broad language in Code
- Requires September presentation to CTB on compliance
- Specifies additional considerations such as:
  - DRPT role
  - Reservation of CTB's right to approve exceptions at any time
  - Timeline for consideration of revisions

2026 Code and Budget Changes

- **Prior WMATA Requirements:**
  - Supply an annual budget and proposed capital expenditures to CTB.
  - Require WMATA General Manager and Commonwealth's WMATA Board members address CTB annually.
  - Limit alternates' participation at Board Meetings when the main Board members are present.
  - Cap operating cost growth to 3% - *to be replaced by new mode-specific unit cost methodology.*
  - Adopt/Update its Strategic Plan every three years and holding a public hearing in NOVA – *to be incorporated into DMVMoves Plan requirement.*
  - Adopt by July 1 a detailed CIP that covers a six-year period and hold a public hearing in NOVA.

- **Additional requirements beginning FY27:**
  - Adopt a 20-year capital plan, financial plan for major projects, performance report and other requirements, to be updated every five years.
  - Annually report on system performance and progress towards DMV*Moves* goals, to NVTC and MWCOG.
  - Report a calculation of mode-specific unit cost and growth, and cap unit growth at 3% starting in FY29 with methodology in FY27.
  - Publish a rail signaling automation and workforce transition plan by FY29.
  - Ensure that no employees are terminated as part of a reduction in force due to automation.

Proposed CTB Policy Changes: Streamlining

Current Guidelines	Recommended
• Establishes July 1 deadline for WMATA to submit documentation asserting compliance with Code requirements.	• DRPT verifies compliance based on observation and adopted/published material. • DRPT shares published materials with CTB.
• Requires September presentation to CTB on compliance.	• Requires annual presentation to CTB.

Proposed CTB Policy Changes:
Reflect Updated Code Language

- Adopt a 20-year capital plan with financial plan for major projects, performance report and other requirements, to be updated every five years.
- Report a calculation of mode-specific unit cost and growth, and cap unit growth at 3% starting in FY29 with methodology in FY27 and baseline in FY28.
- Report on system performance and progress update towards DMV*Moves* goals, to NVTC and MWCOG.
  - Proposed Policy adds CTB as recipient; Budget language with more detail on reporting requirements
- Publish a rail signaling automation and workforce transition plan by FY29.
- Ensure that no employees are terminated as part of a reduction in force due to automation.
- Mechanisms for verification:
  - WMATA Board adoptions
  - Information in Proposed Budget Books and Board Budget Adoption
  - Notification in advance of any terminations due to rail modernization

Recommendation

- Approve revised CTB Policy in October

Questions?

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