



AGENDA ITEM #7

**TO:** Chairman Hudgins and NVTC Commissioners  
**FROM:** Rick Taube  
**DATE:** February 25, 2010  
**SUBJECT:** WMATA Items.

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NVTC's WMATA Board members will describe for your information significant recent events, including the search for a new General Manager, a contract with David Gunn to assess the system, an approved 10-cent fare increase effective this month, and a budget for FY 2011 proposed by WMATA staff.



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# The Washington Post

## What really derails Metro

Sunday, February 14, 2010; A22

EVEN SCARIER than [Friday's derailment of a Metro train](#) is what might have happened if it hadn't left the tracks. Initial reports suggest that the train was on the wrong track when a safety device intentionally stopped it to prevent a possible collision with another train. The alarming incident is but the latest evidence of the deterioration of a system that is vital to Washington and its citizens. Events have so eroded confidence in Metro's safety and reliability that it's time the region's political, business and civic leaders address the crisis.

Thankfully, there were only a few minor injuries when a Red Line train derailed near the Farragut North Station. The timing -- as Washington struggled back to normality after a week of snow closed the federal government and much of the area -- underscored the importance of Metro to the area and its increasing inability to meet those needs. Even before the derailment, Metro on Friday was slow, spotty and cramped. And this follows an eight-month string of fatal accidents, safety failures and other misadventures that are fast turning what was one of the region's best assets into a dangerous liability.

The system faces funding problems, and, to make its situation even more perilous, it will soon be without a general manager in the wake of [John B. Catoe Jr.'s decision to retire](#). The first order of business must be to stabilize the leadership and day-to-day operations. Clearly, though, the system's problems extend beyond the replacement of one leader to the structure and operation of the Washington Metropolitan Area Transit Authority. It is governed by a board comprised of elected and appointed officials from the District, Maryland, and Virginia and, just recently added, representatives from the federal government. Such a structure may have made sense in the 1960s when the Metro system was being built, but it's become increasingly obvious that running an aging rail system is a very different challenge.

Those who have long observed the WMATA board say it is hard for members -- particularly elected officials -- to take off the parochial hats of their jurisdictions in favor of regional interests. Case in point is the opposition of some Virginia members of the board to acting general manager Dan Tangherlini because he was seen as more predisposed to D.C. interests. Given the complexity of the problems facing the system, we also have to wonder about the efficacy of the revolving door of chairmen who serve one year and members who have divided attentions and limited time.

Six years ago, leaders from the Metropolitan Washington Council of Governments, the Federal City Council and the Greater Washington Board of Trade, alarmed about Metro's finances, put together a task force whose work led to a dedicated source of money for Metro. The crisis facing Metro today is every bit as serious. It is time to review, and ultimately to change, how Metro is governed.

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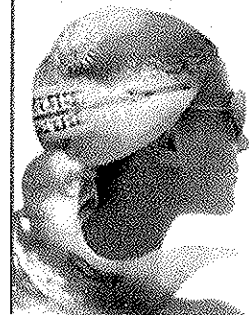
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# The Washington Post

## Ex-general manager David Gunn to assess D.C. area Metro system

By Ann Scott Tyson  
Washington Post Staff Writer  
Thursday, February 18, 2010; B04

Metro is contracting with David L. Gunn, a top transit guru and former Metro general manager, to provide an overarching assessment of what ails the system and how to fix it, agency officials said.

Gunn, a Harvard Business School graduate who led Metro from 1991 to 1994, among a string of key transit jobs, plans to arrive in Washington this month for a two-week appraisal of how Metro is run, they said.

"It's like calling in a specialist: 'Give the system a physical, and tell us what you think,'" said Metro board member Mortimer Downey, one of two new federal appointees to the board of directors.

Board Chairman Peter Benjamin said he called upon Gunn and asked him to help define Metro's problems. "If anyone understands the issues of transit and how to solve them, it is Dave," Benjamin said. "We want to get from him a problem statement: What do we need to fix now, and how do we need to fix it?"

Gunn, 72, reached by phone at his home in Cape Breton Island, Nova Scotia, confirmed his appointment, saying he agreed to take on the job because, as he put it, "they need help."

Gunn explained how he will tackle the assessment.

"It's really a look at the management structure and what they are trying to accomplish with that structure and the resources," including the capital and operating budgets, he said.

In addition, he will look into what Metro reports to the board and "what tools are given to the board to perform its role of oversight."

Gunn will have an office in Metro's executive suite, and at the conclusion of his work, he will give an oral report to the board, he said.

Benjamin said he expects that Gunn's report will also help shape the search for a new permanent leader for Metro to replace General Manager John B. Catoe Jr., who announced last month that he will retire April 2.

The decision to bring in Gunn comes as the transit agency faces some of its greatest challenges ever, including a projected \$189 million budget deficit for 2011, an \$11 billion shortfall in capital funds, an unprecedented string of fatal safety lapses and a major leadership shake-up.

Metro board members spoke glowingly of Gunn's qualifications to provide crucial insights.

"I have extraordinary regard for his understanding of the mechanics of a rail system and buses as well," said Downey, who worked with Gunn in the 1980s at the New York Metropolitan Transportation Authority.

Benjamin, who worked with Gunn at Metro in the early 1990s, said he sought the assessment from Gunn because he is "the best person who can do it anywhere in the country and probably the world."

Gunn, a Boston native who is a dual citizen of the United States and Canada, was a pre-med student at Harvard but said he "always liked trains and machines."

After a stint in the Navy Reserve, he went to business school, receiving an MBA in 1964. He then spent the next decade working for railroad companies across the country. From 1974 to 1999, he worked for transit agencies in Boston, southeastern Pennsylvania, New York, Washington and Toronto, and was president of Amtrak from 2002 until he was fired in 2005 after repeated clashes with the Bush administration.

Gunn, who does not use e-mail or own a cellphone or computer, has a back-to-basics management style that emphasizes setting clear goals and empowering employees, down to supervisors and foremen, to solve problems themselves.

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"What happens in business [is] . . . e-mail is abused tremendously," he said. "You have these managers who e-mail everyone all the time and drive everybody nuts."

In contrast, Gunn said, his method is to agree on a concrete "plan and strategy, and then you get out of the way and don't keep badgering people," largely because that causes employees to be too reliant on the boss for direction.

"With the e-mail and cellphone and raspberries, as I call it, when something goes wrong, they kick all the problems upstairs, and that is not healthy," he said.

As if Metro did not have enough troubles, the latest blizzard delayed Gunn's arrival in Washington, which had been planned for this week. "With all the problems the city was having with recovering from the snowstorms . . . the people I would want to talk to were preoccupied, so we delayed it," he said.

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# The Washington Post

## \$189 million gap has Metro eyeing higher rail, bus fares

By Ann Scott Tyson  
 Washington Post Staff Writer  
 Friday, February 19, 2010; B04

Metro proposed almost \$90 million worth of rail and bus fare increases Thursday to help close a \$189 million gap in the \$1.4 billion operating budget for the fiscal year that begins in July.

The fare hikes would include a 25-cent increase in the boarding charge at peak rail travel times and would raise the maximum peak-period fare from \$4.50 to \$5.00.

The proposal, announced at a Metro Board meeting, also would add 50 cents to the \$1.25 boarding charge for buses and increase the price of a bus pass from \$11 to \$15.

Public hearings will be held on these and other measures to resolve the 2011 budget shortfall, including \$34 million in rail and bus service reductions. Metro also plans to save \$16 million in staffing and other departmental cuts.

Metro plans to gain an additional \$40 million in government subsidies, but officials acknowledged that the availability of those funds remains uncertain, meaning that additional service cuts or borrowing from the capital budget could be necessary.

"We can't have a budget coming from the general manager that is built on sand," board member Jim Graham of the District said at the meeting.

Metro General Manager John B. Catoe Jr. said Metro staff had determined how to make up that \$40 million if it doesn't materialize. "The choices will be to make additional reductions in services. . . . or find some other way of bringing revenue in, which we haven't been able to figure out yet," he said.

The proposed fare increases follow Metro's decision to apply a 10-cent surcharge for bus and rail trips starting Feb. 28 to help close this year's operating budget gap of about \$40 million. On Thursday, the board decided to limit the surcharge to 5 cents for rail and bus trips for senior citizens and people with disabilities.

Metro's financial difficulties were exacerbated by the snowstorms this month, which cost Metro an estimated \$18 million, including \$8 million for snow removal and \$9.7 million in revenue lost because of limited service and extremely low ridership, the agency said in a statement. Snow has also obstructed parking spaces in lots and garages across the system, causing further losses, the statement said.

In addition to fuel and salt, snow-removal costs include overtime for employees and fees for contractors who removed snow.

"Metro is currently working with the commonwealth of Virginia, District of Columbia and the state of Maryland to submit costs to the Federal Emergency Management Agency for potential reimbursement associated with the snowstorms," said Carol Kissal, Metro's chief financial officer. "We are aggressively pursuing recovery of the \$8 million in snow removal costs and the \$9.7 million in lost revenue" through federal disaster aid, she said.

Metro estimates that heavy snow in December 2009 cost it \$2.7 million in revenue.

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## Rick Taube

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**From:** Green, Jennifer A. [jagreen@wmata.com]  
**Sent:** Monday, February 22, 2010 9:06 AM  
**To:** Green, Jennifer A.  
**Subject:** METRO Advisory: Metro fare increase, budget impacts, capital needs

**Importance:** High

**WMATA FY2011 budget:** Each year, WMATA establishes both a capital and operating budget. The capital budget includes items such as rehabilitation, maintenance and replacement of infrastructure and vehicles, and our funding sources include federal capital funding and funding from our local jurisdictional partners. The operating budget includes such items as fuel for buses, electricity for trains, and employee payroll, and our funding sources include revenues and funding from our local jurisdictions. Due mostly to increased expenses and losses in revenue from lower than expected ridership, we are facing a \$189.2 million shortfall in our FY2011 operating budget. (Our fiscal year is July 1 through June 30.) Our Board of Directors is not expected to vote on the final FY2011 budget until June, and we plan to conduct a series of public hearings in April to allow for public input on proposals to balance the FY2011 budget (including a combination of fare increases, Metrorail and Metrobus service reductions, changes to the MetroAccess fare structure and service area allowed under the Americans with Disabilities Act and administrative cuts).

More information: [http://www.wmata.com/about\\_metro/news/PressReleaseDetail.cfm?ReleaseID=4330](http://www.wmata.com/about_metro/news/PressReleaseDetail.cfm?ReleaseID=4330)

**Fare increase related to WMATA FY2010 budget:** Fares on Metrorail, Metrobus and MetroAccess will increase 10 cents, effective Sunday, February 28, through June 26. In addition, fares for senior citizens and people with disabilities will go up five cents and the cost of passes also will increase to help close a shortfall in Metro's current operating budget (i.e., our FY2010 budget). For details on how we're communicating these changes and on specific fare increases during this period, please see: [http://www.wmata.com/about\\_metro/news/PressReleaseDetail.cfm?ReleaseID=4325](http://www.wmata.com/about_metro/news/PressReleaseDetail.cfm?ReleaseID=4325)

**Shortened hours of operation related to WMATA FY2010 budget:** We must reduce hours at four central sales offices (began Friday, Feb. 19). However, customers may purchase farecards and passes online, at Metrobus divisions, commuter stores and at select retail stores--plus they may purchase and add value to SmarTrip® cards at a number of CVS/pharmacy stores throughout the Washington region. Links to our web site for more information are in the press release: [http://www.wmata.com/about\\_metro/news/PressReleaseDetail.cfm?ReleaseID=4329](http://www.wmata.com/about_metro/news/PressReleaseDetail.cfm?ReleaseID=4329).

**WMATA to seek reimbursement for snow-clearing efforts:** The February 2010 snowstorms cost us an estimated \$18 million (\$8 million for snow removal efforts and \$9.7 million in lost revenue). Therefore, we are currently working with the Commonwealth of Virginia, District of Columbia, and State of Maryland to submit costs to the Federal Emergency Management Agency for potential reimbursement associated with the snow storms.

More information: [http://www.wmata.com/about\\_metro/news/PressReleaseDetail.cfm?ReleaseID=4328](http://www.wmata.com/about_metro/news/PressReleaseDetail.cfm?ReleaseID=4328)

**WMATA Capital Needs Inventory:** We have published our Capital Needs Inventory, which details more than \$11 billion of capital improvements that are necessary over the next 10 years to maintain the transit system's safety and reliability. The report provides an in-depth look at necessary investments to address WMATA's physical assets, including vehicles, fleet maintenance facilities, operating systems, information technology, rail system track, passenger facilities, maintenance equipment and support facilities.

Press release: [http://www.wmata.com/about\\_metro/news/PressReleaseDetail.cfm?ReleaseID=4332](http://www.wmata.com/about_metro/news/PressReleaseDetail.cfm?ReleaseID=4332)

Link to report: [http://www.wmata.com/pdfs/planning/CNI\\_02.19.10.pdf](http://www.wmata.com/pdfs/planning/CNI_02.19.10.pdf)

Should you have questions about these or any WMATA issues, please do not hesitate to contact me.

Jennifer Green  
Metro

# The Washington Post

## 2 near-misses and June crash linked, Metro official testifies

By Lena H. Sun, Ann Scott Tyson and Joe Stephens  
Washington Post Staff Writers  
Wednesday, February 24, 2010; B01

Metro received at least two signs before June's fatal crash that its automatic crash-avoidance system might be fundamentally flawed, according to testimony presented Tuesday at a federal safety hearing.

In 2005 and again in early 2009, Metro trains came perilously close to colliding, records show. On Tuesday, a Metro official testified that the same malfunction connects the near-misses with the June crash.

"All three incidents have something in common. All three were failures of the automatic train protection system," said Harry Heilmann, Metro's assistant chief engineer, who headed the investigation into the incidents. "They were all failures of the fail-safe system."

The testimony presented a dramatic conclusion to the first day of a three-day National Transportation Safety Board hearing into the accident and contradicted the agency's public statements on the incidents. Testimony is scheduled to continue Wednesday and Thursday.

The nine-hour session suggested that officials failed to accurately identify the flaw in the automatic-crash avoidance system, which is designed to prevent two trains from occupying the same section of track. In 2005, three trains stopped just short of a crash in a tunnel under the Potomac River, north of Rosslyn. In March 2009, a train overshot a platform on Capitol Hill and stopped dangerously close to another train.

In the 2005 incident, Metro workers replaced equipment that they believed was causing the problem. But Heilmann said under oath that neither Metro nor the equipment manufacturer was "absolutely convinced" that the source had been identified.

He added, "We couldn't come up with another idea."

Heilmann testified that the June crash might have been linked even more closely with the 2005 incident.

"The Rosslyn incident may have been -- there is no way to confirm this -- may have been" caused by a signal that gave a false reading, he said. The signal problem is suspected of causing the Red Line crash, where the system that is supposed to prevent crashes failed to detect the stopped train and did not send commands to slow or stop the approaching train.

After the Red Line crash, Metro spokeswoman Lisa Farbstein told The Washington Post that both incidents were "very different" from the problem suspected of causing the accident. The 2005 incident had been identified and fixed, she has said. The March 2009 incident remains under investigation, officials said Tuesday.

The testimony mirrored the findings of a continuing investigation by The Post, which, during the past eight months, has highlighted numerous safety lapses and management failures within Metro. The series first linked the accident and the near-misses in articles published in August and September.

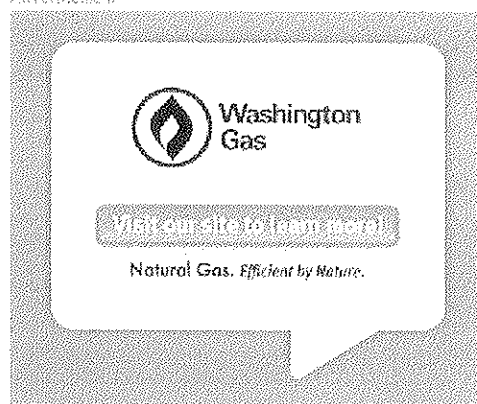
Tuesday was a long day for Metro officials, who were questioned repeatedly about their commitment to safety. The safety board has not taken an official position on the cause of the crash, but the hearing made clear that investigators are examining broad lapses in oversight by Metro and monitoring agencies.

Witnesses scheduled to testify Wednesday and Thursday include officials from the Tri-State Oversight Committee, which monitors Metro safety, and transportation agencies from around the country, including California and Massachusetts.

The safety board also released thousands of pages of interviews and internal Metro documents. Many of the records detailed problems in safety and oversight explored in the articles.

NTSB hearing Chairman Robert Sumwalt, who posed some of the toughest questions, asked why Metro's governing board lists oversight of funding and expansion among its core duties in the agency's official procedures but does not include safety. "Why was safety . . . not in there?" Sumwalt asked new Metro board Chair Peter Benjamin.

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Benjamin agreed that the description should have included safety but said that board members rely on managers to bring exceptional concerns to their attention because of the large number of safety issues the agency faces every day.

Metro Acting Deputy General Manager David Kubicek suggested that a handful of employees were responsible for safety shortcomings. "We have to get rid of these isolated cases," he said. "There is a group down there we have to reach down and get hold of."

The NTSB panel also questioned Metro officials about their rocky relationship with the Tri-State Oversight Committee and their willingness to share information with the independent safety monitoring group. The Post has reported that in the past, Metro has failed to supply records to the committee and that last year Metro banned safety monitors from the committee from walking along live subway tracks.

Panel members grilled Metro officials on the scores of identified safety deficiencies that had languished, uncorrected, for years. Officials accelerated efforts to fix the problems in December.

Sumwalt questioned whether Metro's board had ignored safety while focusing instead on budget shortfalls and other issues. Benjamin said board members might need to broaden their focus.

Relatives of the victims of the June crash watched the exchange from the audience.

"Nothing's going to change," said Kenneth Hawkins, the younger brother of victim Dennis Hawkins, 64, an administrative aide at Whittier Elementary School in Northwest Washington. He called the hearings a "bureaucratic process."

"Who will be there to make [Metro] do what they have to do" to improve, he asked. He said several improvements recommended after a 2004 accident at Woodley Park have not been implemented. The NTSB "has no teeth," he said.

Released documents, including transcripts of emergency calls to 911, paint a graphic portrait of the moments after the crash. The first two calls came from passengers.

"How many people are injured?" a dispatcher asked one caller.

"It's a whole train. A whole train," the caller said.

"The whole train is injured?"

"Yes. . . . There's blood everywhere," the caller said. "The train fell. . . . I can't walk. It hurts so bad."

Another caller gasped: "Oh my God. The train is, like, sticking up in the air."

A third caller worried that another train could be bearing down on the accident site: "Please, stop all trains on the Red Line," he pleaded.

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