# MERIT Program Review

## Operating & Capital Assistance

October 6, 2025

DRPT
VIRGINIA DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION

# Agenda

- MERIT Program Review Policy Goals
- Feedback from TSDAC
  - Capital Assistance
  - Operating Assistance
- Additional Analysis
- Next Steps

# MERIT Program Review
# Policy Goals



VIRGINIA DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION

# Policy Goals

- Simplification and Transparency – The current MERIT formula is very complicated and difficult for grantees to understand.  The use of trends creates anomalies in allocations where good performance is not always rewarded.

- Outcome Focused – Adds a secondary performance review process that is decoupled from the sizing review.  Sizing has performance built in by evaluating ridership, vehicle revenue hours, and vehicle revenue miles.

- Operational Efficiency – To incentivize doing more with the scarce resources available to Commonwealth transit agencies.

Evaluate the public policy goals, not the individual outcomes, as many variables impact allocations from year to year.

# Updated Timeline and Progress To-Date

## Steps Completed To-Date:

- **March 2025:**
  - CTB Rail and Transit Subcommittee: Process Kickoff
- **April 2025:**
  - TSDAC: MERIT Operating & Capital Review Discussion
- **May 2025:**
  - TSDAC: Update on MERIT Operating & Capital Review
- **July 2025:**
  - CTB: Briefing on proposed ideas for MERIT Operating & Capital Changes
  - TSDAC: Briefing on proposed ideas for MERIT Operating & Capital Changes, Discussion, and Feedback
- **August 2025:**
  - TSDAC: Briefing on refined MERIT Operating & Capital Changes
- **September 2025:**
  - One-on-One meetings with TSDAC Members, Transit Service Providers, and other Stakeholders

## Next Steps:

- **October 2025:**
  - TSDAC: Review of feedback from stakeholders, proposed refinements, discussion, and feedback
  - October 7, 2025: Release for 45-day Public Comment
- **November 2025:**
  - November 21, 2025: End of 45-day Public Comment
  - TSDAC: Review Public Comment and provide final review and feedback on proposed changes
- **December 2025:**
  - TSDAC: Review Public Comment and provide final review and feedback on proposed changes
  - CTB: Presentation of proposed changes to CTB Workshop
- **January 2026:**
  - CTB: Vote on adoption of proposed changes

# CTB-TSDAC-DRPT Roles and Responsibilities

Roles and responsibilities of CTB, TSDAC, and DRPT must be consistent with § 33.2-214.4

| CTB | TSDAC | DRPT |
|---|---|---|
| • Sets priorities and adopts policies for implementation of the MERIT Operating formula and MERIT Capital prioritization process consistent with state code | • Consults with DRPT and stakeholders to develop formula concepts and advises on MERIT Operating Assistance policy improvement | • Develops technical guidance and definitions for implementation of the MERIT Operating formula. Runs the formula annually, analyzes outcomes, and recommends changes as needed |

# Feedback from TSDAC

# Feedback from TSDAC

- Feedback on proposed modifications to MERIT Capital and Operating Assistance Programs was solicited from TSDAC members through several meetings:
  - July 2025 TSDAC Meeting
  - August 2025 TSDAC Meeting
  - Small group meetings with TSDAC members:
    - VTA
    - CTAV
    - VACo
    - VML
  - Other Agency Meetings
    - NVTC
    - PRTC

# Feedback on Capital Assistance Proposed Changes

| Proposed Changes | TSDAC Feedback |
|---|---|
| **Develop additional subcategories for project types to better align with scoring methodologies**<br>• New State of Good Repair (SGR) subcategories for SGR with Asset Condition Score and SGR without Asset Condition Score<br>• New Major Projects subcategories for MAJ Expansion and MAJ-SGR<br>• New scoring methodology for MAJ-SGR projects | • No major concerns with formalizing subcategories to align with existing DRPT scoring processes |
| **Score all vehicle expansion projects under MIN** (regardless of number of expansion vehicles purchased) | • Simplifies process and allows for same match ratio for all vehicle expansion projects |
| **Restructure incentive points**<br>• Remove incentive point categories for zero-emissions technology, innovation, and safety & comfort<br>• Add incentive points for good grants management (Project Progress and Project Closeout) | • If incentive point categories are not producing desired results, removing these categories may make sense<br>• For new Project Progress incentive points, the timing of vehicle procurements may result in agencies not having an invoice within 2 years of grant award |
| **Switch to biennial application cycle for Major Projects** | • Need to consider alignment with other funding cycles<br>• Not having applications every year could cause loss of momentum with funding partners |

# Response to Capital Assistance Feedback

- Modifications to proposed changes based on TSDAC feedback:
  - DRPT will look to include exemptions in internal process for reasons outside of agency’s control for why an agency may not meet requirements for Project Progress incentive points (i.e., vehicle procurement timing)
  - DRPT will retain annual cycle for all MERIT Capital Assistance projects

# Feedback on Operating Assistance Proposed Changes

1. **Concern with only including one year of data in Performance calculation**
   - Catastrophic event one year could potentially impact Performance funding allocation
2. **Concern that Commuter Bus (CB) operators may be more significantly impacted than other services**
   - Commuter buses serve fewer riders, who travel longer distances, compared to local bus. Increased weight of ridership in sizing without accounting for passenger miles traveled (PMT) is an unfavorable assessment of value of this transit service
   - Including CB deadhead miles & hours increases Sizing but reduces Performance allocation
   - Excluding cost of state-funded services from the operating costs to use only reimbursable expenses in Sizing calculation understates the size of agencies with significant state-funded services, e.g., commuter bus in Express Lanes corridors
3. **No significant progress has been made to address data limitations identified during the MERIT Review in 2018**
   - Lack of data such as PMT limits ability to explore more significant changes to the formula

# Responses to Operating Assistance Feedback

1. **Evaluate pros and cons of 1-year vs 3-year average Performance data**
   - Impact of 1-year versus 3-year average Performance data
2. **Conduct additional analysis of administrative policy changes**
   - Impact of operating cost assumptions on Sizing
   - Impact of Commuter Bus deadhead miles and hours on Sizing and Performance
3. **Conduct study to evaluate and inform future data collection needs**
   - Study will identify currently available data, data needs, and assess best practices for collecting data

| Grantee | Current Formula | Sizing + Performance Adjustment (Single Year Performace) | | Sizing + Performance Adjustment (3-Year Average Performace) | |
|---|---|---|---|---|---|
| | | $ Difference | % Difference | $ Difference | % Difference |
| AASC / Four County Transit | $ 625,123 | $ 28,233 | 5% | $ 28,965 | 5% |
| City of Bristol Virginia | $ 121,344 | $ 746 | 1% | $ 69 | 0% |
| District Three Public Transit | $ 742,893 | $ (422) | 0% | $ (2,859) | 0% |
| Mountain Empire Older Citizens, Inc. | $ 642,600 | $ 4,900 | 1% | $ 4,900 | 1% |
| Town of Bluefield-Graham Transit | $ 125,489 | $ 11,640 | 9% | $ 11,689 | 9% |
| Charlottesville Area Transit | $ 2,971,812 | $ (16,206) | -1% | $ (10,810) | 0% |
| FRED / Fredericksburg Regional Transit | $ 1,071,485 | $ (79,757) | -7% | $ (90,110) | -8% |
| City of Suffolk | $ 430,651 | $ 37,376 | 9% | $ 45,014 | 10% |
| Greensville County | $ 54,768 | $ (1,430) | -3% | $ (1,673) | -3% |
| Hampton Roads Transit | $ 25,537,379 | $ 507,722 | 2% | $ 555,628 | 2% |
| STAR Transit | $ 371,187 | $ 8,367 | 2% | $ 8,367 | 2% |
| Town of Chincoteague | $ 17,019 | $ (643) | -4% | $ (816) | -5% |
| Williamsburg Area Transit Authority | $ 2,281,227 | $ 33,256 | 1% | $ 33,256 | 1% |
| Danville Transit System | $ 832,019 | $ 28,781 | 3% | $ 38,715 | 5% |
| Farmville Area Bus | $ 196,264 | $ 4,475 | 2% | $ 4,475 | 2% |
| Greater Lynchburg Transit Company | $ 1,703,062 | $ 218,873 | 13% | $ 262,189 | 15% |
| Town of Altavista | $ 41,042 | $ 4,038 | 10% | $ 4,038 | 10% |
| Loudoun County | $ 3,666,512 | $ (85,640) | -2% | $ (78,929) | -2% |
| NVTC - Arlington County | $ 6,007,985 | $ 300,183 | 5% | $ 289,886 | 5% |
| NVTC - City of Alexandria | $ 9,299,604 | $ (53,725) | -1% | $ (78,968) | -1% |
| NVTC - City of Fairfax | $ 1,591,498 | $ 28,720 | 2% | $ 6,235 | 0% |
| NVTC - Fairfax County | $ 25,729,693 | $ (1,616,798) | -6% | $ (1,796,128) | -7% |
| PRTC | $ 8,187,110 | $ (748,658) | -9% | $ (792,055) | -10% |
| City of Petersburg | $ 1,198,959 | $ (18,127) | -2% | $ (19,151) | -2% |
| Greater Richmond Transit Company | $ 18,853,132 | $ 748,030 | 4% | $ 794,362 | 4% |
| Blacksburg Transit | $ 3,483,121 | $ (0) | 0% | $ (0) | 0% |
| City of Radford | $ 501,124 | $ 55,701 | 11% | $ 61,085 | 12% |
| Greater Roanoke Transit Company | $ 3,271,540 | $ 230,908 | 7% | $ 248,736 | 8% |
| Pulaski Area Transit | $ 199,411 | $ 25,445 | 13% | $ 25,532 | 13% |
| Central Shenandoah PDC | $ 657,710 | $ 87,513 | 13% | $ 84,161 | 13% |
| City of Harrisonburg Dept. of Public Transporta | $ 1,997,493 | $ 0 | 0% | $ 0 | 0% |
| City of Winchester | $ 487,667 | $ 2,528 | 1% | $ 4,790 | 1% |
| Bay Aging | $ 1,190,937 | $ (4,655) | 0% | $ (5,226) | 0% |
| Blackstone Area Bus | $ 189,468 | $ 0 | 0% | $ 0 | 0% |
| JAUNT | $ 1,563,531 | $ (163,033) | -10% | $ (167,571) | -11% |
| Lake Area | $ 53,873 | $ 6,319 | 12% | $ 6,671 | 12% |
| RADAR | $ 324,336 | $ 4,859 | 1% | $ 3,685 | 1% |
| VRT | $ 1,082,499 | $ 30,485 | 3% | $ 31,476 | 3% |

**Not a significant difference in overall outcomes between Single-Year and 3-Year Average Performance**

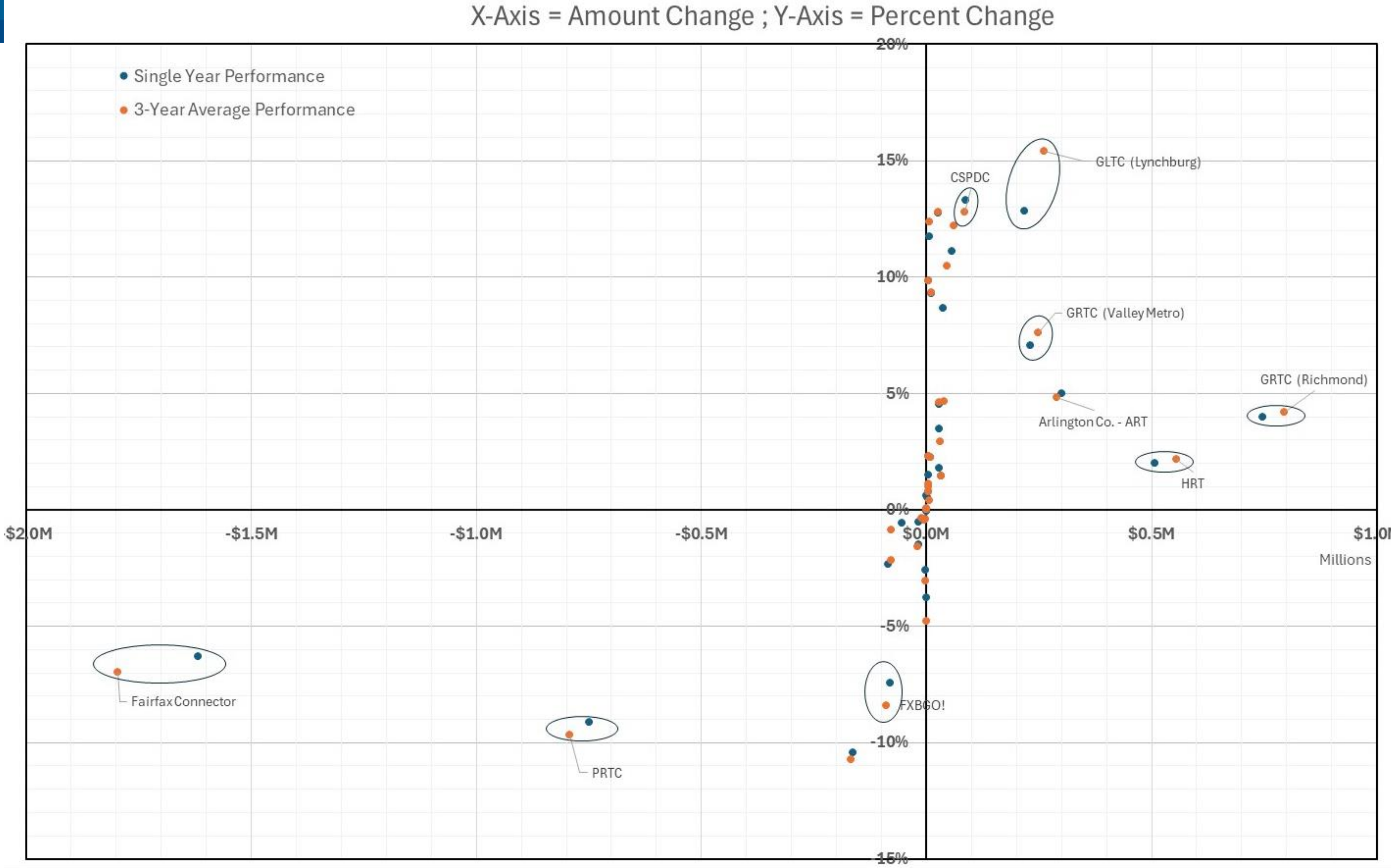
# Alt. A: 3-Year Average Performance Scenario

All allocations are average of FY24, 25 and 26

*All agencies receiving greater/less than $500K or greater/less than 5% of their current allocation are highlighted in green/red*

# Change Relative to Current Formula Allocations for Single Year and 3-Year Average Performance Data

**Orange dots represent deviation ($/%) from current allocation under the proposed Sizing + Performance formula when applying 3-year average performance data (Alt. A)**



# 1. Comparison of 1-Year vs 3-Year Performance Data

| 1-Year Performance Data Scenario | 3-Year Performance Data Scenario |
|---|---|
| Catastrophic event impacts Sizing Metric for 95% of funds for one year in both scenarios | |
| More significant impact of catastrophic event on 5% Performance Allocation calculation in a single year | Smooths out impact of one year with a catastrophic event to the 5% Performance Allocation calculation |
| Catastrophic event impacts Performance Allocation calculation for 5% of funds for only one year | Catastrophic event impacts 5% Performance Allocation calculation for three years |
| Rewards improved performance due to strategic changes in service (i.e., changes to route alignment to improve performance) in next year's 5% Performance Allocation | Impact of improvement in performance will take three years to be fully rewarded in 5% Performance Allocation |

**Using 3-year average to calculate performance does not address the significantly larger impact of the same single year metrics on sizing.**
**Small benefit of smoothing out negative impact to 5% of the allocation is countered by disbenefits noted and additional administrative complexity.**

# 2. Additional Analysis of Administrative Policy Changes

# Administrative Policy Alternatives Tested

- Alt. B: Performance Excludes Commuter Bus Deadhead
  - Sizing: Include Commuter Bus deadhead hours and miles
  - Performance: Exclude Commuter Bus deadhead hours and miles
- Alt. C: Sizing Applies Total Cost of Operations
  - Sizing: Switch to Performance cost data
  - Performance: Continue to use Performance cost data
- Alt. D: Combination of Variations A, B and C

# Alt. B: Performance Excludes CB Deadhead

All allocations are average of FY24, 25 and 26

| Grantee | Current Formula | Sizing + Performance Adjustment (Single Year Performace) | | Sizing + Performance Adjustment (Performance w/o Deadhead) | |
|---|---|---|---|---|---|
| | | $ Difference | % Difference | $ Difference | % Differenc |
| AASC / Four County Transit | $ 625,123 | $ 28,233 | 5% | $ 27,656 | 4% |
| City of Bristol Virginia | $ 121,344 | $ 746 | 1% | $ 670 | 1% |
| District Three Public Transit | $ 742,893 | $ (422) | 0% | $ (1,234) | 0% |
| Mountain Empire Older Citizens, Inc. | $ 642,600 | $ 4,900 | 1% | $ 4,900 | 1% |
| Town of Bluefield-Graham Transit | $ 125,489 | $ 11,640 | 9% | $ 11,606 | 9% |
| Charlottesville Area Transit | $ 2,971,812 | $ (16,206) | -1% | $ (18,731) | -1% |
| FRED / Fredericksburg Regional Transit | $ 1,071,485 | $ (79,757) | -7% | $ (80,899) | -8% |
| City of Suffolk | $ 430,651 | $ 37,376 | 9% | $ 36,971 | 9% |
| Greensville County | $ 54,768 | $ (1,430) | -3% | $ (1,447) | -3% |
| Hampton Roads Transit | $ 25,537,379 | $ 507,722 | 2% | $ 468,155 | 2% |
| STAR Transit | $ 371,187 | $ 8,367 | 2% | $ 8,367 | 2% |
| Town of Chincoteague | $ 17,019 | $ (643) | -4% | $ (659) | -4% |
| Williamsburg Area Transit Authority | $ 2,281,227 | $ 33,256 | 1% | $ 33,256 | 1% |
| Danville Transit System | $ 832,019 | $ 28,781 | 3% | $ 37,573 | 5% |
| Farmville Area Bus | $ 196,264 | $ 4,475 | 2% | $ 4,475 | 2% |
| Greater Lynchburg Transit Company | $ 1,703,062 | $ 218,873 | 13% | $ 216,199 | 13% |
| Town of Altavista | $ 41,042 | $ 4,038 | 10% | $ 4,038 | 10% |
| Loudoun County | $ 3,666,512 | $ (85,640) | -2% | $ (77,565) | -2% |
| NVTC - Arlington County | $ 6,007,985 | $ 300,183 | 5% | $ 287,406 | 5% |
| NVTC - City of Alexandria | $ 9,299,604 | $ (53,725) | -1% | $ (57,170) | -1% |
| NVTC - City of Fairfax | $ 1,591,498 | $ 28,720 | 2% | $ 26,208 | 2% |
| NVTC - Fairfax County | $ 25,729,693 | $ (1,616,798) | -6% | $ (1,649,996) | -6% |
| PRTC | $ 8,187,110 | $ (748,658) | -9% | $ (648,675) | -8% |
| City of Petersburg | $ 1,198,959 | $ (18,127) | -2% | $ (19,000) | -2% |
| Greater Richmond Transit Company | $ 18,853,132 | $ 748,030 | 4% | $ 743,617 | 4% |
| Blacksburg Transit | $ 3,483,121 | $ (0) | 0% | $ (0) | 0% |
| City of Radford | $ 501,124 | $ 55,701 | 11% | $ 55,541 | 11% |
| Greater Roanoke Transit Company | $ 3,271,540 | $ 230,908 | 7% | $ 228,593 | 7% |
| Pulaski Area Transit | $ 199,411 | $ 25,445 | 13% | $ 25,432 | 13% |
| Central Shenandoah PDC | $ 657,710 | $ 87,513 | 13% | $ 86,592 | 13% |
| City of Harrisonburg Dept. of Public Transporta | $ 1,997,493 | $ 0 | 0% | $ 0 | 0% |
| City of Winchester | $ 487,667 | $ 2,528 | 1% | $ 2,216 | 0% |
| Bay Aging | $ 1,190,937 | $ (4,655) | 0% | $ (5,313) | 0% |
| Blackstone Area Bus | $ 189,468 | $ 0 | 0% | $ 0 | 0% |
| JAUNT | $ 1,563,531 | $ (163,033) | -10% | $ (163,886) | -10% |
| Lake Area | $ 53,873 | $ 6,319 | 12% | $ 6,314 | 12% |
| RADAR | $ 324,336 | $ 4,859 | 1% | $ 4,595 | 1% |
| VRT | $ 1,082,499 | $ 30,485 | 3% | $ 29,551 | 3% |

**Not a significant difference in overall outcomes with adjustment to remove deadhead miles and hours for performance calculation for commuter bus systems**

**Small improvement in outcomes for PRTC**

*All agencies receiving greater/less than $500K or greater/less than 5% of their current allocation are highlighted in green/red*

| Grantee | Current Formula | Sizing + Performance Adjustment (Single Year Performace) | | Sizing + Performance Adjustment (Total Cost for Sizing) | |
|---|---|---|---|---|---|
| | | $ Difference | % Difference | $ Difference | % Difference |
| AASC / Four County Transit | $ 625,123 | $ 28,233 | 5% | $ 23,660 | 4% |
| City of Bristol Virginia | $ 121,344 | $ 746 | 1% | $ 0 | 0% |
| District Three Public Transit | $ 742,893 | $ (422) | 0% | $ (5,655) | -1% |
| Mountain Empire Older Citizens, Inc. | $ 642,600 | $ 4,900 | 1% | $ 4,900 | 1% |
| Town of Bluefield-Graham Transit | $ 125,489 | $ 11,640 | 9% | $ 11,273 | 9% |
| Charlottesville Area Transit | $ 2,971,812 | $ (16,206) | -1% | $ (30,498) | -1% |
| FRED / Fredericksburg Regional Transit | $ 1,071,485 | $ (79,757) | -7% | $ (63,866) | -6% |
| City of Suffolk | $ 430,651 | $ 37,376 | 9% | $ 33,842 | 8% |
| Greensville County | $ 54,768 | $ (1,430) | -3% | $ (1,585) | -3% |
| Hampton Roads Transit | $ 25,537,379 | $ 507,722 | 2% | $ 313,365 | 1% |
| STAR Transit | $ 371,187 | $ 8,367 | 2% | $ 8,367 | 2% |
| Town of Chincoteague | $ 17,019 | $ (643) | -4% | $ (727) | -4% |
| Williamsburg Area Transit Authority | $ 2,281,227 | $ 33,256 | 1% | $ 33,256 | 1% |
| Danville Transit System | $ 832,019 | $ 28,781 | 3% | $ 39,187 | 5% |
| Farmville Area Bus | $ 196,264 | $ 4,475 | 2% | $ 4,475 | 2% |
| Greater Lynchburg Transit Company | $ 1,703,062 | $ 218,873 | 13% | $ 230,444 | 14% |
| Town of Altavista | $ 41,042 | $ 4,038 | 10% | $ 4,038 | 10% |
| Loudoun County | $ 3,666,512 | $ (85,640) | -2% | $ (122,027) | -3% |
| NVTC - Arlington County | $ 6,007,985 | $ 300,183 | 5% | $ 244,739 | 4% |
| NVTC - City of Alexandria | $ 9,299,604 | $ (53,725) | -1% | $ (70,904) | -1% |
| NVTC - City of Fairfax | $ 1,591,498 | $ 28,720 | 2% | $ 26,981 | 2% |
| NVTC - Fairfax County | $ 25,729,693 | $ (1,616,798) | -6% | $ (1,794,322) | -7% |
| PRTC | $ 8,187,110 | $ (748,658) | -9% | $ (349,160) | -4% |
| City of Petersburg | $ 1,198,959 | $ (18,127) | -2% | $ (20,876) | -2% |
| Greater Richmond Transit Company | $ 18,853,132 | $ 748,030 | 4% | $ 764,467 | 4% |
| Blacksburg Transit | $ 3,483,121 | $ (0) | 0% | $ (0) | 0% |
| City of Radford | $ 501,124 | $ 55,701 | 11% | $ 57,794 | 12% |
| Greater Roanoke Transit Company | $ 3,271,540 | $ 230,908 | 7% | $ 217,108 | 7% |
| Pulaski Area Transit | $ 199,411 | $ 25,445 | 13% | $ 25,035 | 13% |
| Central Shenandoah PDC | $ 657,710 | $ 87,513 | 13% | $ 136,868 | 21% |
| City of Harrisonburg Dept. of Public Transporta | $ 1,997,493 | $ 0 | 0% | $ 0 | 0% |
| City of Winchester | $ 487,667 | $ 2,528 | 1% | $ 885 | 0% |
| Bay Aging | $ 1,190,937 | $ (4,655) | 0% | $ 18,991 | 2% |
| Blackstone Area Bus | $ 189,468 | $ 0 | 0% | $ 0 | 0% |
| JAUNT | $ 1,563,531 | $ (163,033) | -10% | $ (164,582) | -11% |
| Lake Area | $ 53,873 | $ 6,319 | 12% | $ 6,068 | 11% |
| RADAR | $ 324,336 | $ 4,859 | 1% | $ 14,284 | 4% |
| VRT | $ 1,082,499 | $ 30,485 | 3% | $ 26,069 | 2% |

**Not a significant difference in overall outcomes with adjustment to use total instead of reimbursable cost for sizing with a few notable exceptions**

**Improvement in outcomes for Fredericksburg**

**Notable improvement in outcomes for PRTC and CSPDC**

*All agencies receiving greater/less than $500K or greater/less than 5% of their current allocation are highlighted in green/red*

# Alt. C: Sizing Applies Total Cost of Operations

All allocations are average of FY24, 25 and 26

VIRGINIA DEPARTMENT OF RAIL AND PUBLIC TRANSPORTATION

# Alt. D: Combination of Variations A, B and C

All allocations are average of FY24, 25 and 26

| Grantee | Current Formula | Sizing + Performance Adjustment (Single Year Performace) | | Sizing + Performance Adjustment (All Alternatives) | |
|---|---|---|---|---|---|
| | | $ Difference | % Difference | $ Difference | % Differenc |
| AASC / Four County Transit | $ 625,123 | $ 28,233 | 5% | $ 23,904 | 4% |
| City of Bristol Virginia | $ 121,344 | $ 746 | 1% | $ 0 | 0% |
| District Three Public Transit | $ 742,893 | $ (422) | 0% | $ (8,679) | -1% |
| Mountain Empire Older Citizens, Inc. | $ 642,600 | $ 4,900 | 1% | $ 4,900 | 1% |
| Town of Bluefield-Graham Transit | $ 125,489 | $ 11,640 | 9% | $ 11,282 | 9% |
| Charlottesville Area Transit | $ 2,971,812 | $ (16,206) | -1% | $ (27,646) | -1% |
| FRED / Fredericksburg Regional Transit | $ 1,071,485 | $ (79,757) | -7% | $ (75,225) | -7% |
| City of Suffolk | $ 430,651 | $ 37,376 | 9% | $ 40,959 | 10% |
| Greensville County | $ 54,768 | $ (1,430) | -3% | $ (1,841) | -3% |
| Hampton Roads Transit | $ 25,537,379 | $ 507,722 | 2% | $ 328,059 | 1% |
| STAR Transit | $ 371,187 | $ 8,367 | 2% | $ 8,367 | 2% |
| Town of Chincoteague | $ 17,019 | $ (643) | -4% | $ (908) | -5% |
| Williamsburg Area Transit Authority | $ 2,281,227 | $ 33,256 | 1% | $ 33,256 | 1% |
| Danville Transit System | $ 832,019 | $ 28,781 | 3% | $ 37,946 | 5% |
| Farmville Area Bus | $ 196,264 | $ 4,475 | 2% | $ 4,475 | 2% |
| Greater Lynchburg Transit Company | $ 1,703,062 | $ 218,873 | 13% | $ 270,458 | 16% |
| Town of Altavista | $ 41,042 | $ 4,038 | 10% | $ 4,038 | 10% |
| Loudoun County | $ 3,666,512 | $ (85,640) | -2% | $ (107,521) | -3% |
| NVTC - Arlington County | $ 6,007,985 | $ 300,183 | 5% | $ 224,271 | 4% |
| NVTC - City of Alexandria | $ 9,299,604 | $ (53,725) | -1% | $ (99,340) | -1% |
| NVTC - City of Fairfax | $ 1,591,498 | $ 28,720 | 2% | $ 1,725 | 0% |
| NVTC - Fairfax County | $ 25,729,693 | $ (1,616,798) | -6% | $ (1,987,921) | -8% |
| PRTC | $ 8,187,110 | $ (748,658) | -9% | $ (300,795) | -4% |
| City of Petersburg | $ 1,198,959 | $ (18,127) | -2% | $ (22,726) | -2% |
| Greater Richmond Transit Company | $ 18,853,132 | $ 748,030 | 4% | $ 804,550 | 4% |
| Blacksburg Transit | $ 3,483,121 | $ (0) | 0% | $ (0) | 0% |
| City of Radford | $ 501,124 | $ 55,701 | 11% | $ 61,371 | 12% |
| Greater Roanoke Transit Company | $ 3,271,540 | $ 230,908 | 7% | $ 232,375 | 7% |
| Pulaski Area Transit | $ 199,411 | $ 25,445 | 13% | $ 25,106 | 13% |
| Central Shenandoah PDC | $ 657,710 | $ 87,513 | 13% | $ 137,025 | 21% |
| City of Harrisonburg Dept. of Public Transport | $ 1,997,493 | $ 0 | 0% | $ 0 | 0% |
| City of Winchester | $ 487,667 | $ 2,528 | 1% | $ 2,801 | 1% |
| Bay Aging | $ 1,190,937 | $ (4,655) | 0% | $ 17,970 | 2% |
| Blackstone Area Bus | $ 189,468 | $ 0 | 0% | $ 0 | 0% |
| JAUNT | $ 1,563,531 | $ (163,033) | -10% | $ (169,695) | -11% |
| Lake Area | $ 53,873 | $ 6,319 | 12% | $ 6,408 | 12% |
| RADAR | $ 324,336 | $ 4,859 | 1% | $ 12,854 | 4% |
| VRT | $ 1,082,499 | $ 30,485 | 3% | $ 26,315 | 2% |

**Not a significant difference in overall outcomes with applying all variations to the base Sizing + Performance formula**

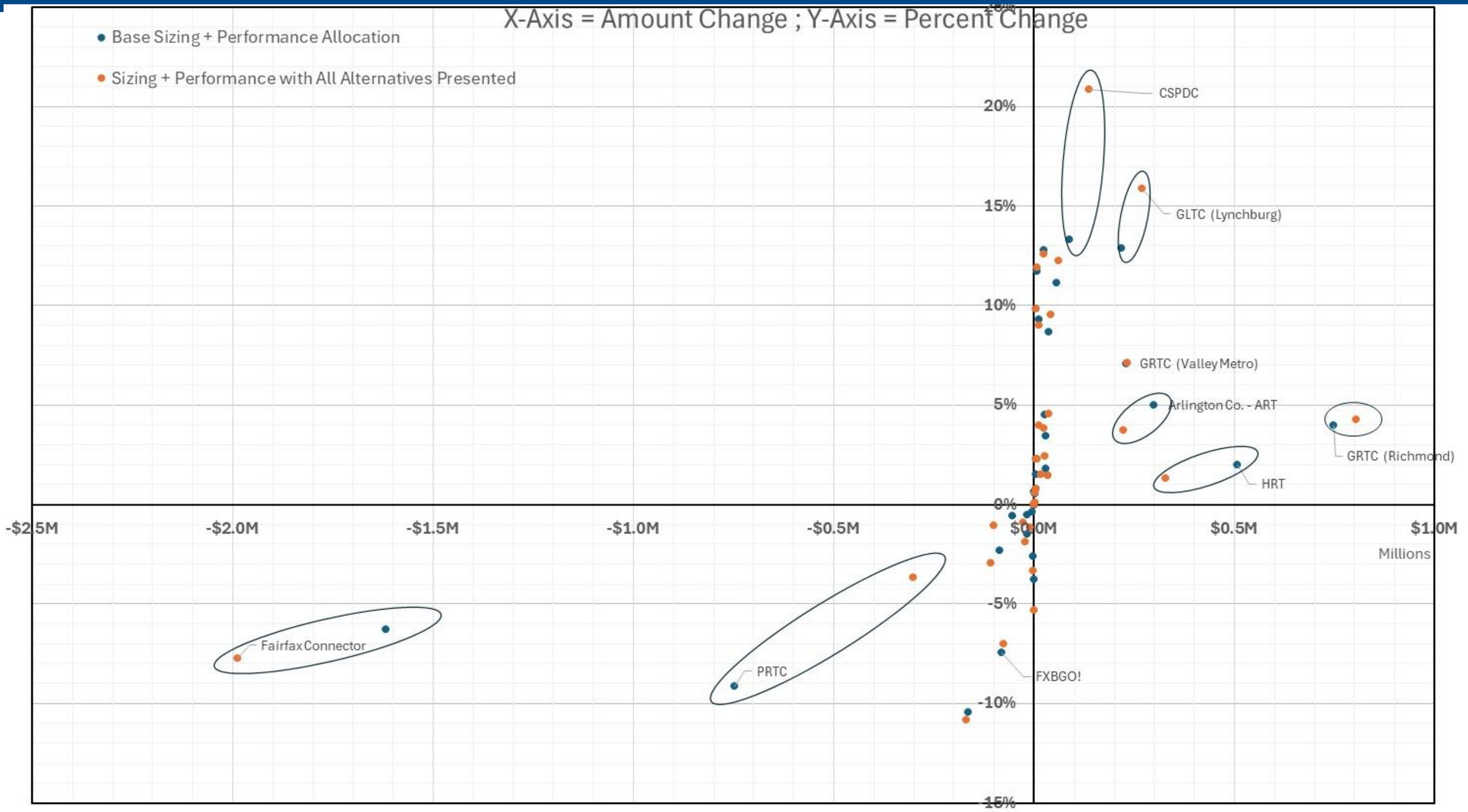
**Improvement in outcomes for Fredericksburg**

**Notable improvement in outcomes for PRTC and CSPDC**

*All agencies receiving greater/less than $500K or greater/less than 5% of their current allocation are highlighted in green/red*

# Change Relative to Current Formula Allocations for Sizing+ Performance with no/all Adjustments Presented

Orange dots represent deviation ($/%) from current allocation under the proposed Sizing + Performance formula with 3-year average performance data and adjustments made to deadhead miles/hours and sizing cost (Alt. D)



# Summary of Alternative Approaches

None of the alternatives tested deviate notably from the baseline Sizing + Performance scenario in terms of allocations at the district level

- **A:** Averaging Performance over 3 years vs. a single year does not meaningfully change allocations
- **B:** Calculating Performance excluding Commuter Bus deadhead hours and miles does not meaningfully change allocations
- **C:** Using total cost for Sizing instead of reimbursable expenses makes a notable difference for agencies with subsidized services whose costs are excluded from existing Sizing calculation
- **D:** In combination, the change in cost for Sizing accounts for ~90% of the change in allocations under the alternative approaches

# Next Steps

# Next Steps

- **October 2025:**
  - TSDAC: Review of feedback from stakeholders, proposed refinements, discussion, and feedback
  - October 7, 2025: Release for 45-day Public Comment
- **November 2025:**
  - November 21, 2025: End of 45-day Public Comment
  - TSDAC: Review Public Comment and provide final review and feedback on proposed changes
- **December 2025:**
  - TSDAC: Review Public Comment and provide final review and feedback on proposed changes
  - CTB: Presentation of proposed changes to CTB Workshop
- **January 2026:**
  - CTB: Vote on adoption of proposed changes