

Meeting of the RTA Board of Directors

August 20, 2026

Welcome! Meeting Starts at 9:00 a.m.

Meeting Agenda: rtachicago.org



1. Call to order

Pledge of allegiance



RTA Board of Directors meeting

- Roll call
- Approval of minutes

4. Public Comment

5. Executive Director's report



6. Information items

6a. Report on the Ad Hoc Committee on the Transition to NITA



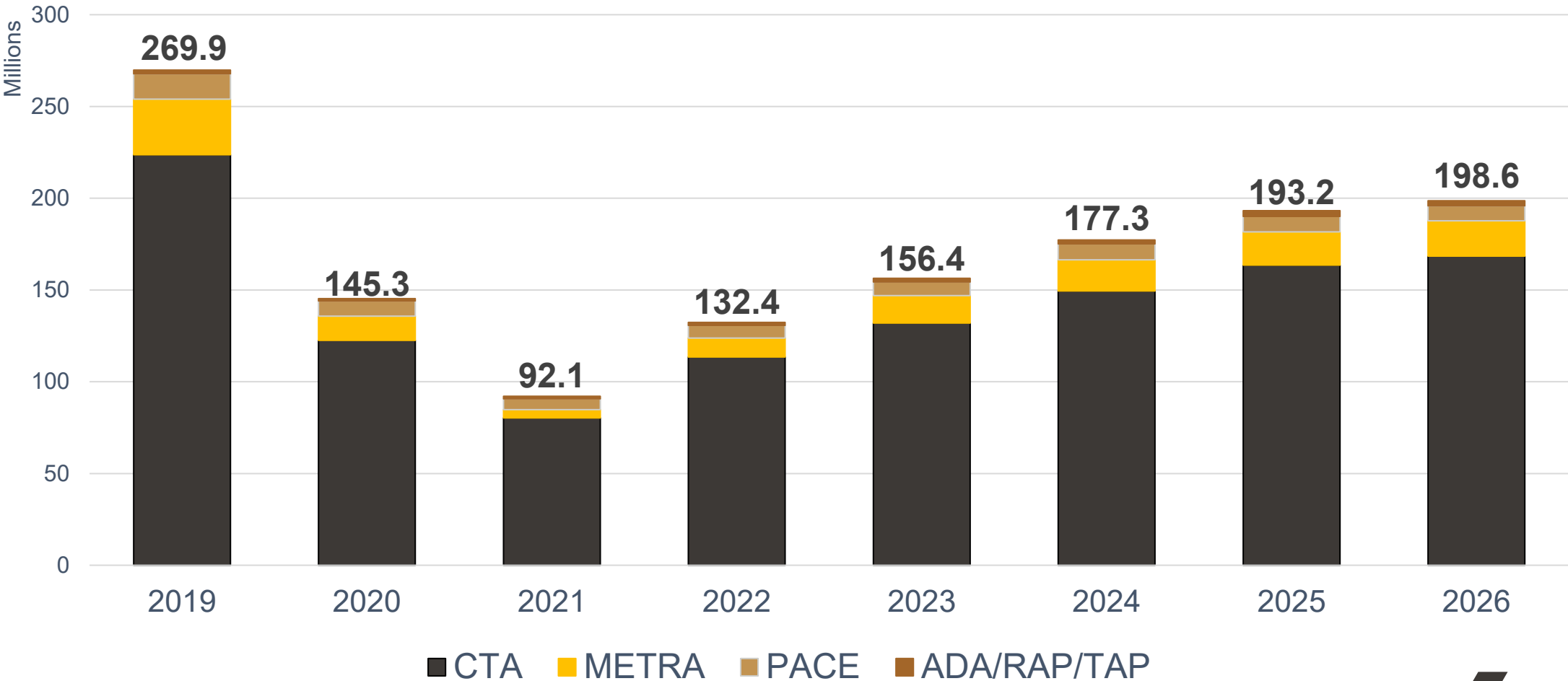
7. Action items

7a. Quarterly performance and Resolutions certifying Financial results - Second Quarter 2026



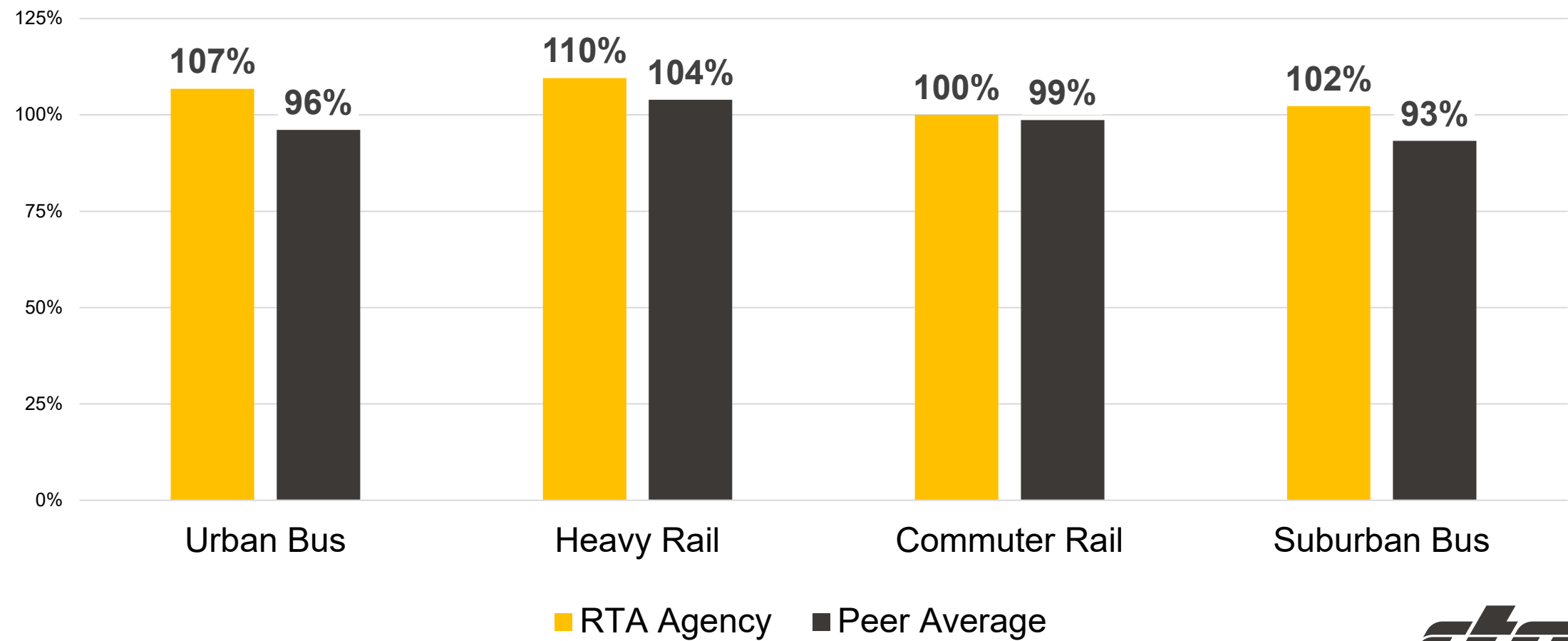
Ridership through June

Ridership through June has grown 116% since 2021



Service levels

**Service Levels through June Met or Exceeded Pre-Pandemic Levels
and Outperformed Peers for Each Mode**

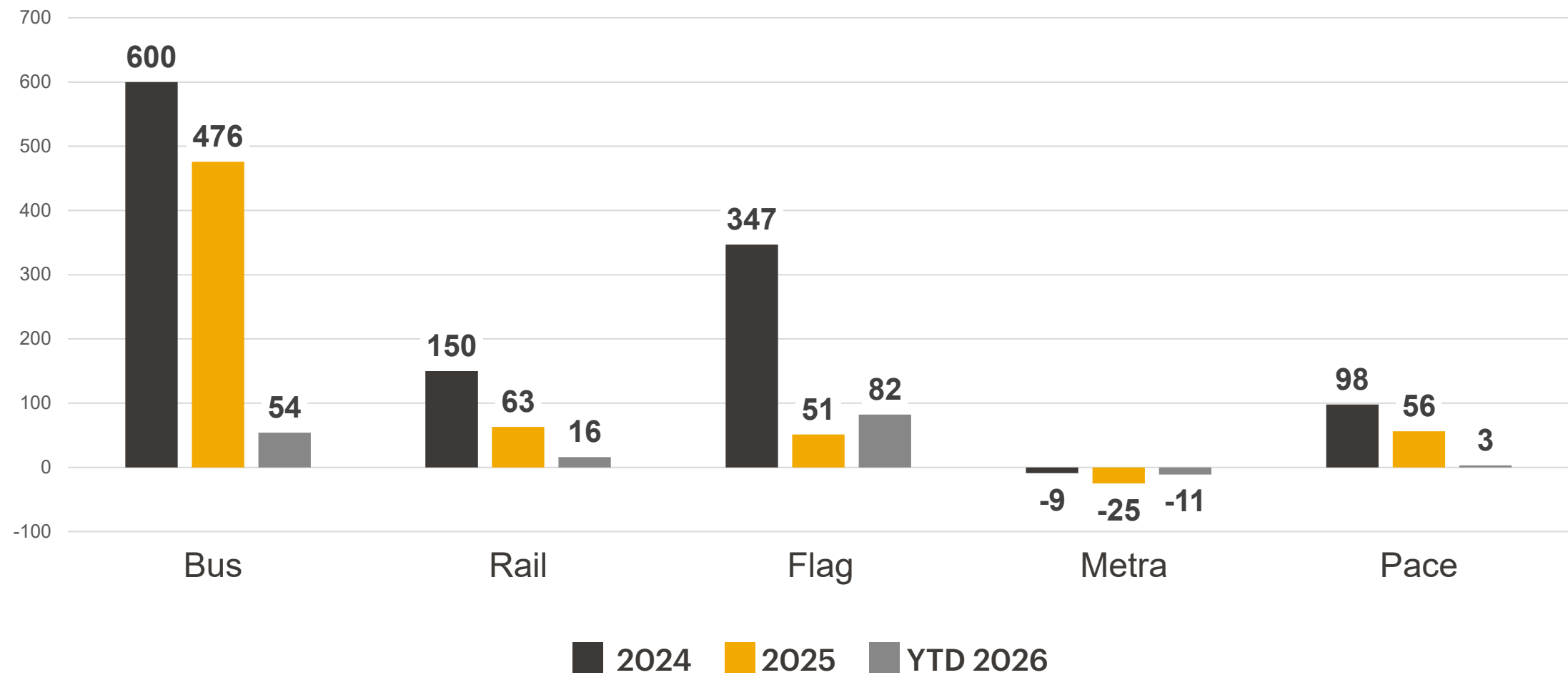


Performance measurement update

- Omnibus data reporting requirements from Illinois PA 103-0281 have ended
 - Service Boards and RTA are continuing to update the monthly dashboards on service, staffing, and public safety measures
 - This information report summarizes the latest updates from Q2 2026
 - NITA will design a regional performance measurement framework
- <https://www.transitchicago.com/performance/#kpis>
 - <https://metra.com/performance-measures>
 - <https://www.pacebus.com/performance-measures>

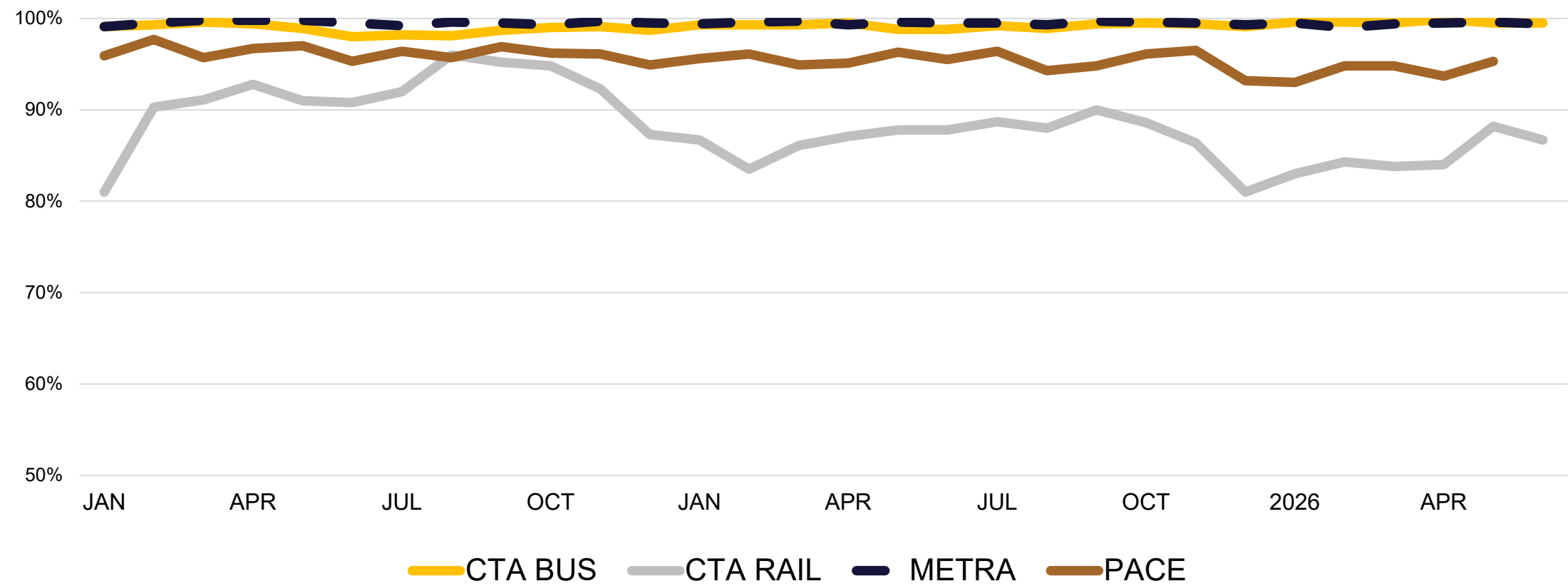
Service Boards need to ramp up staffing further

Annual Service Operator Hiring (net new positions)



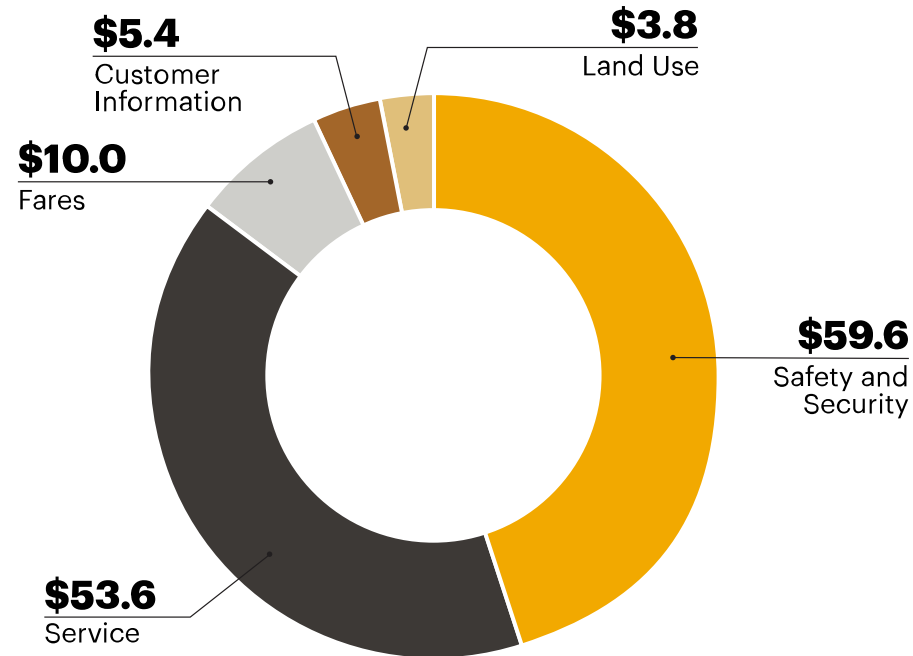
Service

Weekday Service Delivery
% Scheduled Service Delivered, by Agency



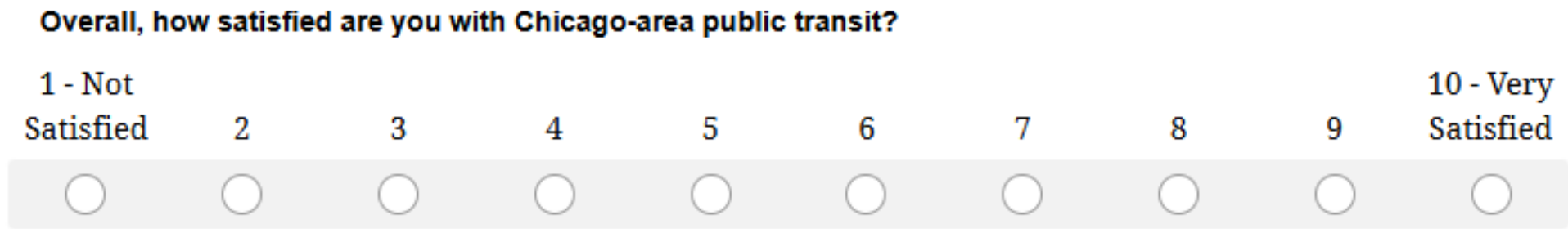
2026 Budget amendment investments

- All 43 projects funded are under way
- 5 areas:
 - Safety & Security
 - Service
 - Fares
 - Customer Information
 - Land Use



Homewood		7:19 AM
ME	#105 to University Park	6 Min 📶
ME	#708 to Millennium	10 Min 📶
ME	#728 to Millennium	7:30 AM
ME	#110 to Millennium	7:46 AM
ME	#112 to Millennium	8:04 AM
ME	#107 to University Park	8:27 AM
Pace Connections		
 pace	#359 North to 95th/Dan Ryan CTA	7:32 AM
 pace	#359 North to 95th/Dan Ryan CTA	43 Min 📶

Panel survey: Overall satisfaction at highest levels since 2022



Scores of six or higher	Q2 2026	Q1 2026	Q4 2025	Q3 2025	Q2 2025
How satisfied are you with the value of service considering the fare paid?	85%	81%	79%	83%	82%
How likely are you to recommend transit services of the Chicago region to others?	83%	80%	79%	83%	81%
Overall, how satisfied are you with Chicago-area public transit?	80%	76%	73%	74%	74%

Panel survey: Service quality

Consider all transit service in the Chicago region that you're familiar with. On a scale from 1-10, how satisfied are you with...

Scores of six or higher	Q2 2026	Q1 2026	Q4 2025	Q3 2025	Q2 2025
Staff	82%	78%	75%	77%	73%
Getting to your destination on time	80%	77%	75%	75%	73%
Service available when and where you need to go	79%	78%	74%	76%	71%
Delay / Real-time information	70%	67%	65%	64%	62%
Personal security	64%	58%	57%	60%	56%
Cleanliness	63%	54%	56%	63%	56%

n varies



Panel survey: Public safety

On a scale of 1-10, please indicate how strongly you would agree with the statements below using your primary mode of travel?

Scores of six or higher	Q2 2026	Q1 2026	Q4 2025	Q3 2025	Q2 2025
I feel safe when traveling from home to my first station	78%	74%	68%	70%	71%
I feel safe when waiting at stations/stops	70%	66%	61%	62%	64%
I feel safe on the bus or train	68%	62%	57%	62%	64%
I feel safe when traveling to my final destination from where I get off my bus/train	77%	74%	69%	70%	72%

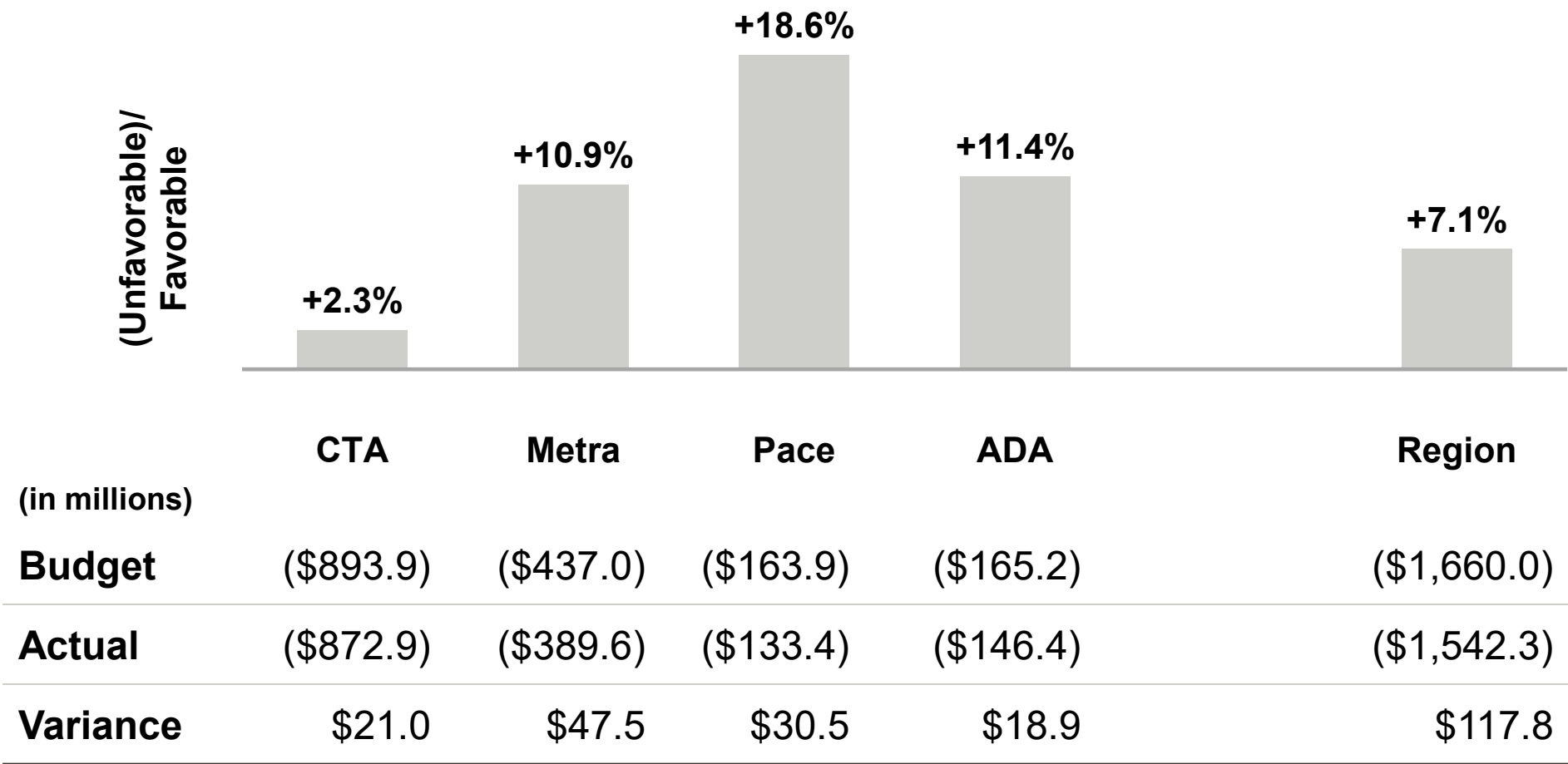
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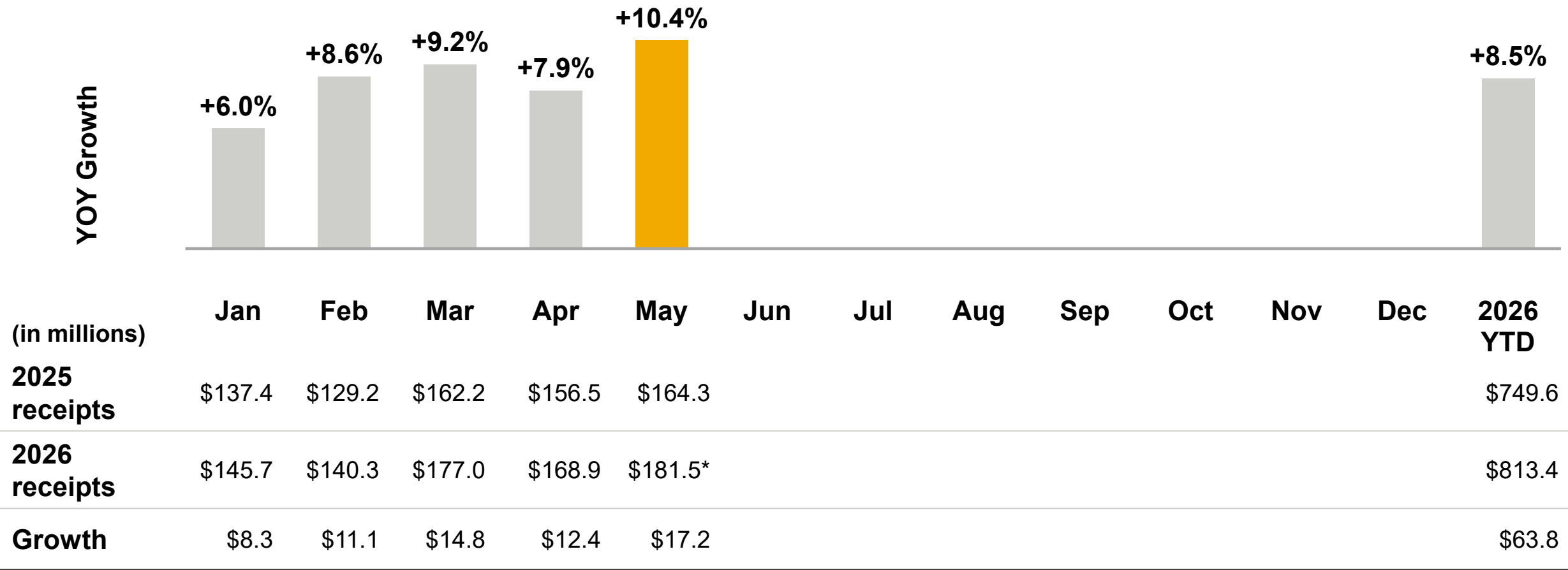
Finance



Operating deficit variances from budget YTD through June



Monthly sales tax growth through May 2026



*May 2026 receipts are estimated based on warrants received by RTA.

**7b. Ordinance
establishing estimates
of funding amounts
available to NITA and the
Service Boards for the
2027-2029 Operating
Budgets, the required
Recovery Ratios for 2027,
and the preliminary 2027-
2031 Capital Program
funding amounts**



Operating Funding Marks



Operating funding considerations

Process

- NITA Act requires funding amounts for upcoming year to be established by September 15
- Follow a three-step process outlined in the NITA Act for allocations in years 2027-2029
- Service Boards develop budgets utilizing the funding amounts set by the NITA Board

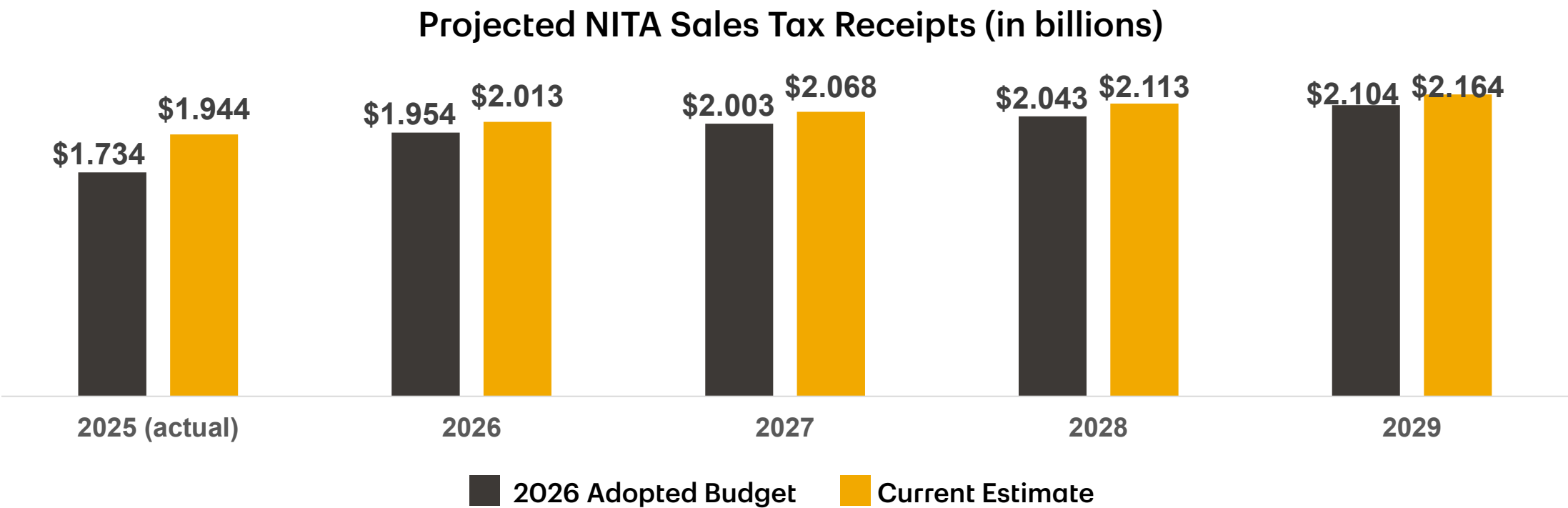
Priorities

- Fund the initiatives included in the 2026 Budget Amendment at an annual level
- Define additional costs from new NITA requirements
- Retain flexibility for NITA Board in 2027 to allocate additional resources

Projected sales tax receipts

Every year, sales tax projections are updated based on the prior year actual results, current year trends, and recent forecasts.

This chart shows the change in NITA sales tax projections compared to the current budget.



Projected NITA Sales Tax Receipts chart includes NITA Sales Tax, I, II, and III.



Background - public funding sources for Operations

- **Sales Tax I:** The original RTA sales tax, levied at 1.0% in Cook County and 0.25% in the collar counties of DuPage, Kane, Lake, McHenry, and Will.
- **Sales Tax II:** Authorized by the 2008 funding reform, an additional sales tax of 0.25% in all six RTA counties.
- **Sales Tax III:** Authorized by Public Act 104-0457 and effective August 1, 2026, an additional sales tax of 0.25% in all six RTA counties.
- **Public Transportation Fund I:** 25% match of Sales Tax I receipts provided by the State.
- **Public Transportation Fund II:** Authorized by the 2008 funding reform, is a 5% match of Sales Tax I receipts and a 30% match of Sales Tax II receipts and RETT receipts provided by the State.
- **Chicago Real Estate Transfer Tax (RETT):** The 2008 funding reform increased the City of Chicago RETT by \$1.50 per \$500 of property transferred to directly fund CTA operating expenses and security for CTA's pension bond obligations.
- **State sales tax on gas:** Authorized by Public Act 104-0457 and beginning July 1, 2026, the RTA region receives 85% of the 5.0% state portion of the existing 6.25% state sales tax on gasoline.

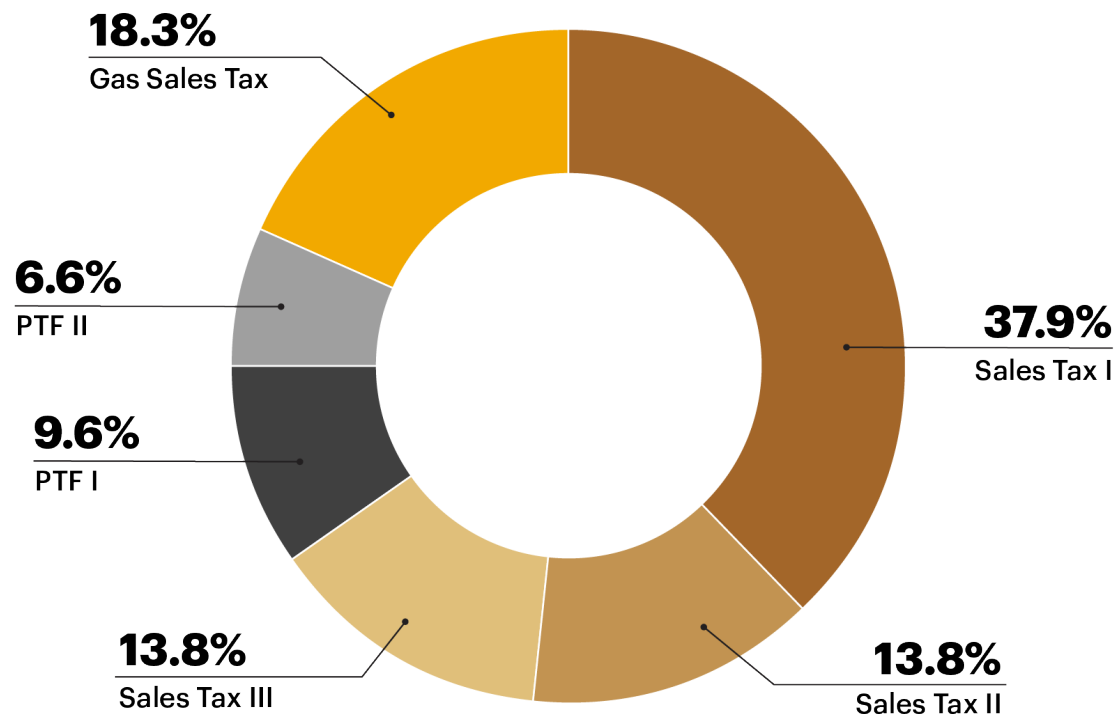
Additional State of Illinois operating funding

- State FY 2027 budget includes:
 - PTF at full 30% match of existing NITA Sales Tax I and Sales Tax II, as well as the RETT
 - Reduced Fare Reimbursement = \$23.1M
 - ADA Paratransit funding = \$11.5M
 - AFA for SCIP bonds = \$99.2M



Public funding amounts

2027 Public Funding Sources



(in millions)	2027 Budget	% of Total
Sales Tax I	\$1,514.6	37.9%
Sales Tax II	\$553.0	13.8%
Sales Tax III	\$553.0	13.8%
PTF I	\$383.8	9.6%
PTF II	\$265.7	6.6%
State Sales Tax on Gas	\$731.0	18.3%
Total	\$4,000.9	100.0%

Proposed 2027 funding levels

	2026 Amended Budget	2027 Proposed	\$ Change	% Change
CTA	\$1,583.0	\$2,051.6	+\$468.6	+29.6%
Metra	\$685.8	\$943.5	+\$257.7	+37.6%
Pace	\$279.0	\$334.5	+\$55.5	+19.9%
ADA Paratransit	\$336.8	\$336.8	+\$0.0	+0.0%
Debt Service and JSIF	\$59.2	\$62.4	+\$3.2	+5.4%
Existing RTA/NITA Agency	\$40.4	\$41.6	+\$1.2	+3.0%
New NITA requirements and reserves	\$224.6	\$350.0	+125.4	+55.8%
Total	\$3,208.8	\$4,120.4	+\$911.6	+28.4%

Includes Sales Tax, PTF, RETT, State funding for ADA



Recovery ratios and efficiencies

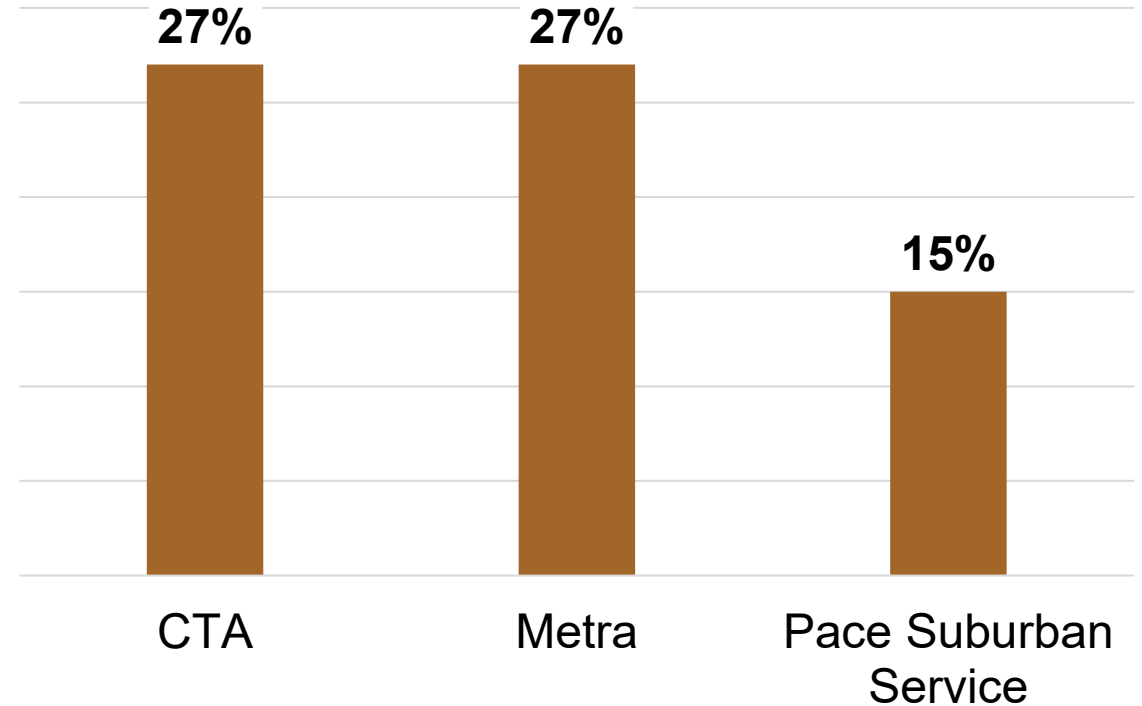
Recovery ratio of at least:

- 25% for FY 2027-2028 in the annual budget and financial plan
- 20% beginning in 2029
- The penalty (remitting the deficit to the State) associated with not attaining the recovery ratio in FY 2027 is waived
- ADA Paratransit services must attain a 5% recovery ratio

Other statutory requirements:

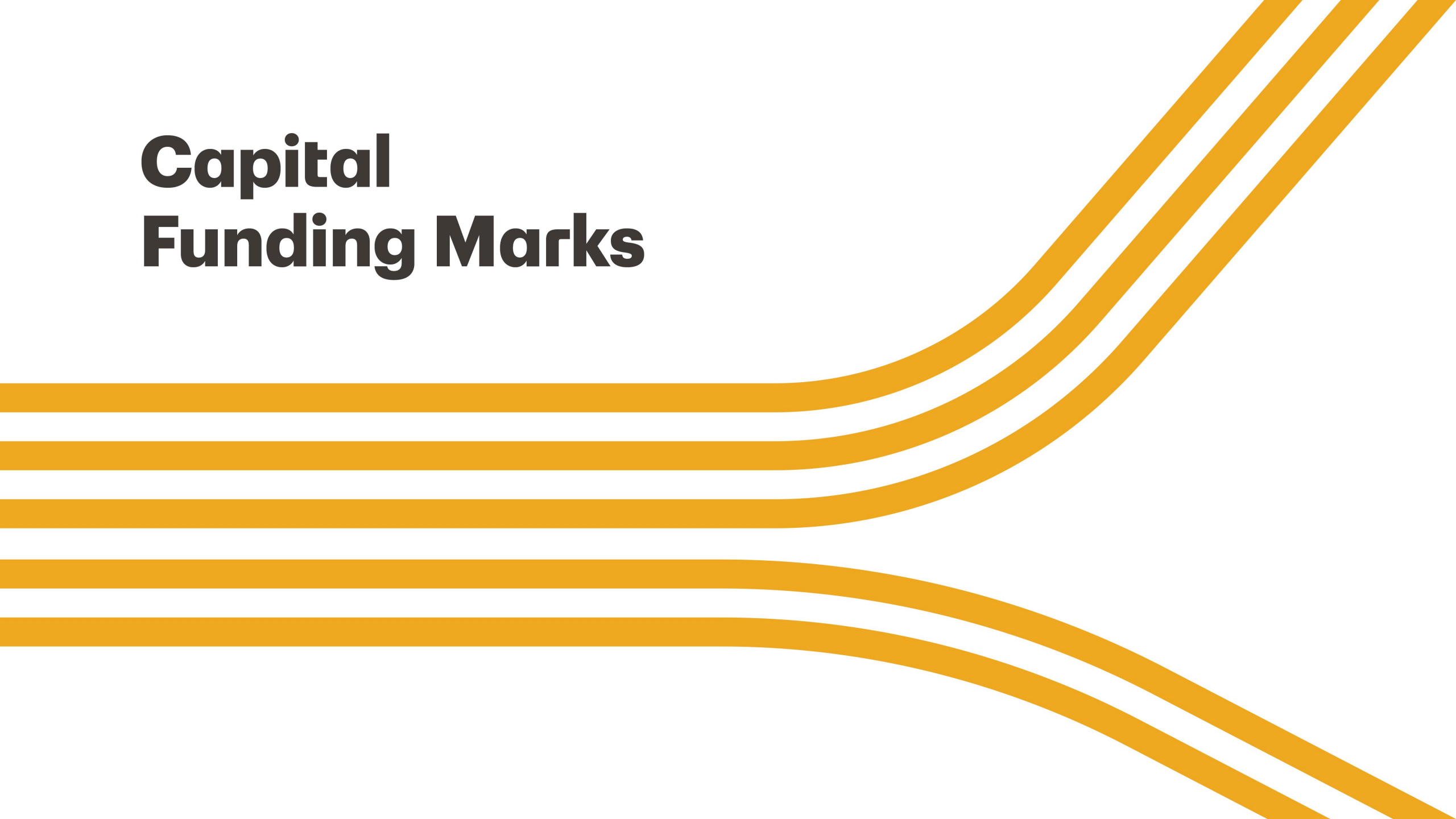
- \$46 million efficiencies will be included in the 2027 Budget
- Fares cannot be increased until June 1, 2027

FY2027 Service Board Recovery Ratios



ADA Paratransit recovery ratio: 5%

Capital Funding Marks

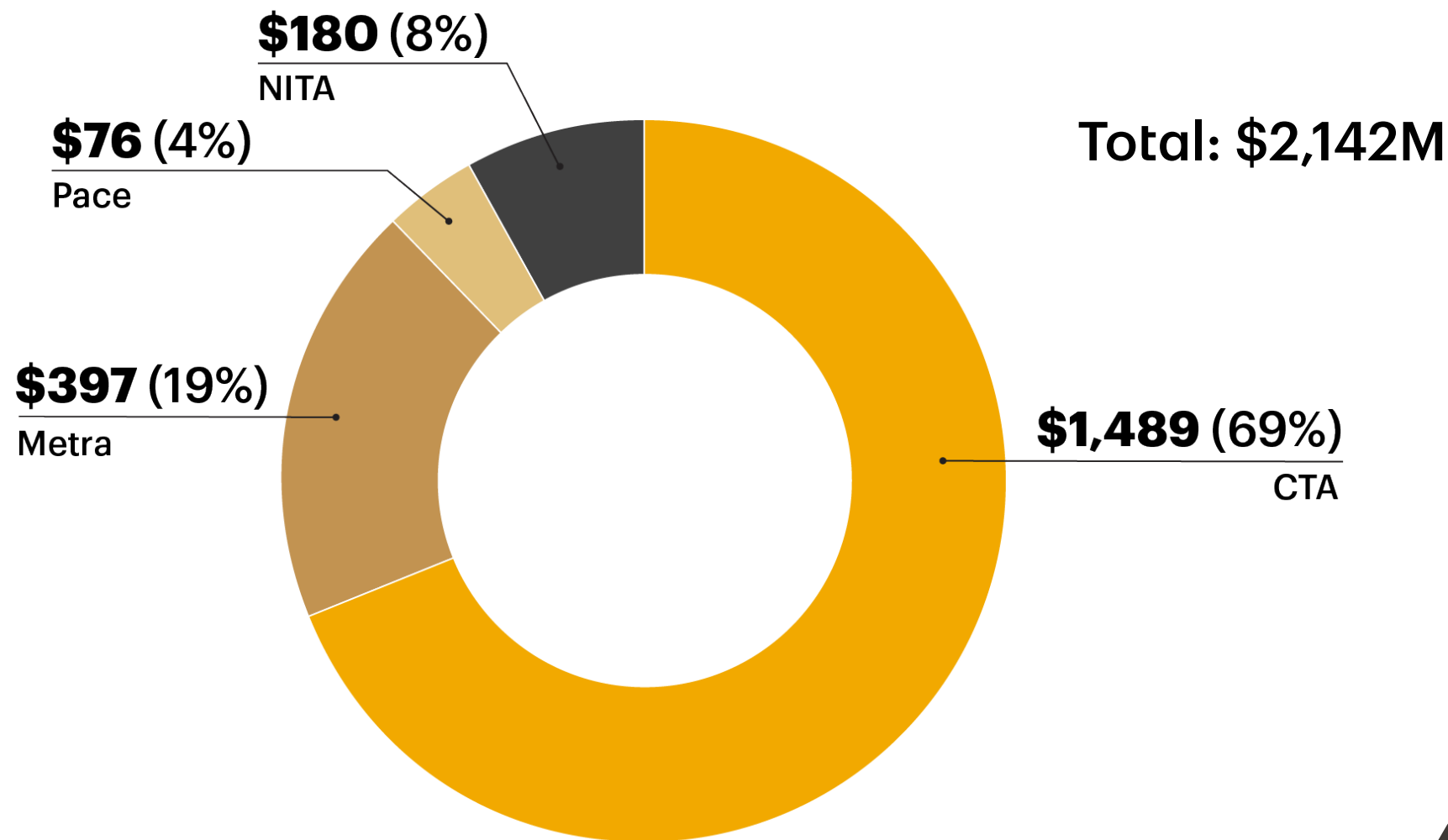


2027 Capital Program by funding source

Funding Source	2027 Funding	%
Federal Formula	\$772M	36%
Federal Discretionary	268M	13%
State	480M	22%
NITA, Service Board & Local	621M	29%
Total	\$2,142B*	100%

*Rounding may result in slight discrepancies in “Total”

2027 Capital Program Allocation by Service Board (in millions)



2027-2031 Capital Program by funding source

Funding Source	2027-2031 Funding	%
Federal Formula	\$3,938M	42%
Federal Discretionary	892M	10%
State	2,477M	26%
NITA, Service Board & Local	2,070M	22%
Total	\$9,378M*	

*Rounding may result in slight discrepancies in “Total”

Capital Marks by Agency

	2027	2028	2029	2030	2031	Total Program
NITA	\$180M	\$180M	\$180M	\$195M	\$196M	\$931M
CTA	1,489M	1,627M	1,268M	984M	673M	6,040M
Metra	397M	408M	416M	434M	386M	2,041M
Pace	76M	77M	78M	67M	67M	365M
Total	\$2,142M	\$2,292M	\$1,942M	\$1,680M	\$1,322M	\$9,378M

Capital Allocation for Federal Formula and PAYGO MFT

- State PAYGO MFT and FTA Formula Funds Marks set based on Performance Based Programming
- Base funding allocation on each Service Board's proportion of the regional annual capital need to achieve a State of Good Repair in 20 years.

2027-2029 CTA: 59.7%, Metra: 33.2%, Pace: 7.1%

2030-2031 CTA: 58.7%, Metra: 34.9%, Pace: 6.4%

- 50% of funds are incremented based on performance-based measures

2027-2031 Funding Available for Federal Formula and PAYGO-MFT

Funding Source	2027	2028	2029	2030	2031
Federal Formula	\$772M	\$780M	\$787M	\$795M	\$803M
State PAYGO - MFT	300M	308M	315M	323M	331M
Total	\$1,072M	\$1,088M	\$1,102M	\$1,118M	\$1,134M

2027-2031 Capital Marks– Performance Based Programming

- 2030 and 2031 funds will have performance metrics applied:
 - Average age of funds
 - Percent of funds spent
- Approved exemptions and delays are included in the marks

Withholding	2030	2031
CTA	\$0	\$0
Metra	\$10.06M	\$10.18M
Pace	\$4.49M	\$6.06M
Total held by NITA	\$15.55M	\$16.24M

State PAYGO interest funding

- New capital funding provided by the NITA Act: Interest generated on the State Road & Construction funds
- The State has estimated that \$200M in interest will be generated annually and 90% of that funding is allocated to the NITA region (\$180M)
- Annual allocations will depend on interest rates and balances in the State Road and Construction Account
- This funding is not yet in the Service Board marks
- 2026 and 2027 funding will be added to the proposed budget based on a project selection process

State PAYGO interest funding

Service Boards will provide a proposed project list that could be delivered with the new funds with the following key criteria in mind:

1. Ability to deliver project quickly that create wins for riders and employees
2. Projects that improve the region's State of Good Repair
3. Projects that address NITA legislation mandates
4. Projects that make improvements to rider and/or employee experience in:
 - Places to Wait for Transit (Stops, Stations, etc.)
 - On Transit (Vehicles, fares, infrastructure etc.)
 - Rider Information (IT, maps, signage, etc.)
 - Frontline Employee Improvements (restrooms, breakrooms, bus shields)
 - Safety & Security
 - Interagency Hubs (Improvements to transfers)

State PAYGO interest funding – next steps

- NITA staff to provide service boards with feedback and follow up questions on proposals
- Candidate projects to be shared during public engagement in September
- Vetted projects to be included in November budget presentations to the board and counties
- Final projects and budgets to be include in 2027-2031 Capital Program for adoption at the December Board meeting

2027 Budget calendar (tentative board dates)

- May 21 Board Adoption of the 2027 Budget Call
- Aug 20 Board considers adoption of 2027-2031 funding amounts
- Sept Service Boards to present capital program proposals to labor
- Late Sep Initial public engagement before full budget proposals released
- Sept 25 Capital Evaluations to be submitted to NITA
- Oct 2 Capital and Operating Budget submitted to NITA
- Sept/Oct Service Boards and NITA develop regional budget
- Early Nov NITA Proposed Budget released, with Service Board Proposals
- Nov 12 Service Board and NITA Staff present proposals to NITA Board
- Nov/Dec NITA Regional Budget and Capital Program public hearing
- Nov/Dec NITA staff present Regional Budget and Program to six County Boards
- Dec 10 NITA Board considers adoption of 2027 Regional Budget and Capital Program

7c. Ordinance approving the agency's Federal Title VI Plan 2026-2029



**7d. Ordinance
authorizing a
contract for Regional
Information
Technology (IT)
Research and
Advisory Services**



**7e. Ordinance
authorizing an Acting
Trustee on the Board
of Trustees for the
Retirement Plan for CTA
Employees and on the
Board of Trustees for
the Retiree Health
Care Trust for CTA
Employees**



7f. Resolution to honor RTA Board members



7g. Approval of travel expense reimbursement(s)



8. New Business

Adjournment

The next Ad Hoc Committee meeting is scheduled for Wednesday, August 26.

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