

Transit Call Recap – May 13, 2026

- **Fiscal Year-End Finance Updates:** Beth provided comprehensive updates on the transition to FY27, including timelines for state and federal agreement distribution, claim submission guidance, and reminders about capital project requirements.
 - **Agreement Distribution Timelines:** Beth explained that state agreement contract packages for FY27 are under review and will be sent out by the end of the week via DocuSign, with recipients required to review and return signed agreements within 30 days. Federal agreements are being assembled but will be sent only after FTA grant awards, typically in late summer.
 - **Claim Submission Guidance:** Beth addressed recent issues with 5310 claims, noting that IT has corrected split percentages, allowing agencies to submit claims. Agencies should contact their accounting specialist or Beth if further issues arise.
 - **Grant Approvals and Contract Preparation:** Beth reported that the board approved several grants at recent meetings, including 5303 planning, 5311 capital, 5339 capital, and others. Finance is actively preparing contract packages, with state grants expected to be released soon.
 - **Capital Project Claim Requirements:** Beth emphasized that all capital claims must include a completed and notarized MVR1 title application, with IMD listed as the first lien holder, insurance information, and VIN number. Claims missing these elements will be returned.
 - **Contact Updates and Response Expectations:** Beth announced that Equilla Drakeford has returned from leave and is the point of contact for the coastal region, while Micaiah Atwater covers Western Piedmont. Agencies should allow one to two business days for responses due to the busy period.
- **Grant Administration and UGA Process Updates:** Casondra led updates on the FY27 and FY28 UGA processes, highlighting deadlines, document requirements, and improvements to supplemental document access, with other team members supporting the discussion and addressing participant questions.
 - **FY27 UGA Process Status:** Casondra noted that the FY27 UGA process is nearing completion, with Beth's team handling agreement distribution.

Applications for several grant types are going to the May Board of Transportation.

- **FY28 Pre-Application and Deadlines:** Casondra urged agencies to complete the FY28 pre-registration form and phase one documents by June 5th, emphasizing stricter adherence to deadlines for FY28 and providing guidance on contacting RGS if registration links are missing.
- **Supplemental Document Access Improvements:** Casondra explained that supplemental documents have been moved to a dedicated page on the Connect site, with descriptive links and images to facilitate easier access and bookmarking for agencies.
- **Document Requirements and Common Errors:** Casondra detailed requirements for conflict of interest statements, Title VI forms, and program resolutions, noting that the authorized representative, certifying official, and notary must be different individuals, and local share certificates must meet or exceed requested amounts.
- **Special Initiative Concept Grant Guidance:** Casondra, with input from Kenetta and others, provided detailed guidance on the special initiative concept grant, including funding limits, application types, oversight requirements, and eligibility, while addressing multiple participant questions.
 - **Grant Structure and Funding Limits:** Casondra clarified that the grant allows up to \$200,000 per entity, with collaborative projects increasing the total funding accordingly. The grant is 100% state funded, and the project period runs from July 1, 2026, to June 30, 2027.
 - **Application Types and Coordination Projects:** Most agencies are expected to submit coordination projects, which aim to establish formal relationships to maximize resources and improve access, especially for long-distance fixed routes.
 - **Oversight and Lead Agency Responsibilities:** In response to one question, Kenetta confirmed that the lead agency must provide oversight for funds passed through to partner entities, matching the oversight level NCDOT applies to agencies.
 - **Eligibility and Application Process:** Casondra explained the eligibility of replacement vehicles and provided instructions for entering vehicle

information and odometer photos in the EBS application, with guidance available in the program packet.

- **Future Funding and Match Requirements:** Kenetta noted that while the grant is 100% state funded for FY27, future years may revert to a 50-50 match, depending on available funds and program structure.
- **ROAP Fund Utilization and Reporting:** Casondra reviewed ROAP fund expenditures, transfer options, and reporting requirements, emphasizing timely submission of monthly and year-end reports to enable FY27 distributions, and provided guidance on correcting negative balances and confirming report approvals.
 - **ROAP Fund Expenditure Overview:** Casondra reported that over \$14 million in ROAP funds have been spent year-to-date, with additional funds transferred to match other grants and systems using other funds to maintain services.
 - **Transfer and Reporting Guidance:** Employment funds can be transferred to EDTAP and RGP if needed, and agencies should report transfers in the month they occur to avoid negative balances. Casondra advised contacting RGS for assistance with transfer processes.
 - **Monthly and Year-End Report Deadlines:** Monthly ROAP reports are due 30 days after month-end, with April reports due May 29th. Agencies should confirm or request reports back within four days of receiving confirmation emails.
 - **Outstanding Reports and Distribution Impact:** Casondra stressed that outstanding reports from previous months must be resolved before FY27 distributions can begin, urging agencies to finalize corrections and approvals promptly.
- **Procurement and Statewide Contract Updates:** Blair and Chris provided updates on statewide procurement contracts, including pending approvals, contract extensions, and available resources for transit systems, with guidance on compliance and federal clause requirements.
 - **Pending Contract Approvals:** Blair announced that the statewide contract is awaiting final approval from NCDOA, with the previous contract extended through July and further extensions possible if needed.

- **Large Bus Contract Timeline:** Blair explained that the heavy-duty large bus contract is in creation and will be released after the current contract is finalized to avoid overlapping bids.
- **Existing Statewide Contract Resources:** Chris listed existing statewide term contracts for transit purposes, including scheduling software, LTVs, ADA minivans, and IT equipment, noting that most non-DOT contracts lack federal clauses and require additional compliance steps.
- **Resource Access and Support:** Chris directed participants to the IMD procurement page and Department of Administration master lists for contract information, offering direct support for compliance and procurement questions.
- **Compliance Review Process and Format Changes:** Kevin updated the group on the status of FY25 compliance reviews, future format changes to Smartsheet-based reviews, and procedures for reporting casualty losses, with Blair assisting in clarifying terminology and process details.
 - **Compliance Review Status:** Kevin reported that 27 of 38 FY25 compliance reviews are closed, with 11 in process. Agencies with only a Title VI policy outstanding should contact Earle to expedite closure.
 - **Future Review Format:** Kevin announced that compliance reviews will transition to a fully digital Smartsheet format, eliminating the compliance workbook and enabling better tracking of deficiencies and training needs.
 - **Legal Background and Metrics:** The new format will include legal references for questions and allow for tabulation of review metrics to inform training and technical assistance priorities.
 - **Casualty Loss Reporting Procedure:** Kevin instructed agencies to contact them directly for vehicle casualty losses, as the accident incident occurrence Smartsheet does not notify them of total loss cases, and specific documents are required to release titles.
- **Training Program and Calendar Updates:** Blair presented upcoming training sessions, including Transit Academy 101, PASS and PAT train-the-trainer sessions, OPSTATS training, and Drug and Alcohol classes, as well as updates to the Training Hub webpage and key calendar deadlines.
 - **Upcoming Training Sessions:** Blair listed scheduled training events, including Transit Academy 101 in Winston-Salem, PASS train-the-trainer

sessions in Hendersonville and Henderson, OPSTATS training by ITREI, PAT training in August and September, and drug and alcohol classes in October.

- **Training Hub Webpage Updates:** The Training Hub webpage now only retains recordings from the past year, with upcoming sessions and IMD core training resources listed for easy access.
- **Key Calendar Deadlines:** Blair highlighted important deadlines, including claims and April ROAP report due May 29th, FY28 pre-application due June 5th, and the next transit call scheduled for June 10th, with a reminder of office closure on Memorial Day.

Follow-up tasks:

- **Special Initiative Concept Grant Application Corrections:** IMD will reach out to applicants who submitted their special initiative concept grant applications under the incorrect category and ensure their applications are moved to the correct location in EBS. (Casondra, RGS)
- **Casualty Loss Vehicle Reporting:** Notify Kevin directly via call or email if a vehicle accident is likely to result in a total casualty loss and provide required documents to initiate the title release process. (All transit agencies)
- **Outstanding ROAP Reports Submission:** Submit outstanding ROAP reports from November, January, and February that have been returned for corrections or additional documentation and notify grants admin if resubmitted. (All transit agencies)
- **FY27 ROAP Application Release:** Submit all FY26 data as soon as possible to enable timely release of the FY27 ROAP application and allocation information. (All transit agencies)