

Transit Call Recap – September 09, 2026

Opening Announcements

- **Budget Expansion Requests and Technology Survey Outcomes:** Brennon discussed ongoing preparations for the next budget expansion requests to the General Assembly, including plans to expand ROAP and SMAP funding, and highlighted early results from the recent technology survey, emphasizing safety, updated software, and improved communications for transit agencies.
 - **Expansion Request Preparation:** Brennon explained that the team is proactively preparing expansion requests for the upcoming legislative session, with a call for requests expected at the end of September or early October. The focus will be on expanding ROAP and SMAP funding, building on previous momentum and incorporating feedback from legislative debriefs to strengthen their case.
 - **Technology Survey Participation:** Brennon thanked participants for responding to the technology survey, noting 50-60 responses. The responses are being categorized to identify agency needs and inform a cohesive ask for new technologies to support transit agencies.
 - **Safety and Technology Needs:** Survey results revealed significant concerns about safety, including requests for additional cameras, driver awareness technologies, and vehicle monitoring. Agencies also expressed the need for up-to-date scheduling and fare collection software, and improved education about existing contracts.
 - **Emergency Communications Improvements:** Brennon highlighted the need for better redundancy in emergency communications, referencing challenges during Helene. The team is exploring technology-based systems to enhance agency-community communication and ensure reliable information dissemination.
- **NCPTA Work Group and Legislative Updates:** Brennon recapped the recent NCPTA work group meeting, covering legislative updates, marketing strategies for public transit, and success stories related to ROAP and SMAP funding and concept plan implementation, aiming to improve agency understanding and advocacy.

- **Legislative Impact Discussion:** The NCPTA work group discussed how General Assembly rulings affect public transit at the local level and encouraged agencies to engage with local legislators to influence future decisions.
- **Marketing Initiatives:** Brennon emphasized the importance of marketing public transit by sharing rider stories and expanding outreach across North Carolina, with plans for further discussion and support from NCPTA.
- **ROAP and SMAP Success Stories:** The group reviewed achievements in accelerating ROAP and SMAP fund distribution and making concept plans more accessible to transit agencies, highlighting increased funding flexibility and availability.
- **Customer Service Survey and Internal Process Improvements:** Brennon announced the upcoming customer service survey, shared positive feedback from last year, and described internal efforts to improve response consistency, transparency, and process changes based on agency pain points.
 - **Survey Results and Feedback:** Last year's customer service survey showed 80-85% positive feedback for IMD, prompting continued efforts to enhance service quality and internal education.
 - **Customer Service Principles:** IMD managers developed customer service principles focused on timely, respectful responses and thorough follow-through, including redirecting inquiries to subject matter experts when necessary.
 - **Process and Policy Adjustments:** IMD is reviewing processes and policies to ensure information is readily available and pain points raised by agencies are addressed through education or procedural changes.
 - **Transparency and Expectations:** Brennon stressed the importance of transparency and clear expectations in customer interactions, encouraging honest feedback in the upcoming survey to drive further improvements.

Finance Updates

- **Finance Branch Updates and Claims Processing:** Monique provided updates on upcoming finance deadlines, contract review procedures, documentation

requirements, and reminders for claims processing, emphasizing accuracy and timely communication with finance staff.

- **Claims and Reporting Deadlines:** Monique outlined due dates for July, August, and September claims, as well as fiscal year 26 Q4 program income and charter reports, urging agencies to submit claims promptly upon receiving agreement numbers.
- **Contract Review and Return Process:** Agencies are instructed to review fiscal year 27 contracts for accuracy and return them within 30 days via DocuSign, avoiding self-attestation to prevent delays.
- **Documentation Naming Conventions:** Claims supporting documentation must include G or M codes in file names, with each document attached separately except for salary and fringes, to ensure efficient review and processing.
- **Claims Correction and Communication:** Monique reminded agencies to maintain correct contact information, communicate with claim reviewers, and respond to correction requests within three business days to avoid claim returns.
- **Vehicle Reimbursement Requirements:** For vehicle reimbursement claims, agencies must submit inspection forms, vendor invoices, title applications, insurance information, payment documentation, and procurement letters if not on state contract.

Grant Administration Updates

- **Grant Administration Staffing and UGA Application Process:** Kenetta announced Carolyn Freitag's retirement and Jordan Lynch's promotion, while Casondra provided updates on the UGA application process, emphasizing stricter deadlines, document requirements, and guidance for agencies.
 - **Staffing Changes:** Carolyn Freitag will retire effective October 1st, and Jordan Lynch has been promoted to regional grant specialist for the mountain region. Agencies with questions previously directed to Carolyn should now contact Casondra.
 - **UGA Application Deadlines:** Casondra stressed the importance of submitting outstanding phase one documents and completing applications

by October 2nd, with a stricter approach to deadlines for submissions and corrections.

- **Document Submission Requirements:** Agencies must submit all required documents in EBS and Smartsheet, not Dropbox, and ensure proper completion of application profile forms, public hearing requirements, and program resolutions with correct roles and notarization.
- **Allocation Clarification:** Casondra clarified that state operating amounts sent in July reflected only IMD's 50% share, and agencies should prepare applications accordingly, reaching out for allocation information if needed.
- **ROAP and SMAP Disbursement and Reporting Procedures:** Casondra detailed the ROAP and SMAP disbursement process, reporting deadlines, reconciliation outcomes, and provided guidance on fund transfers and timely report responses to ensure smooth operations.
 - **Disbursement Timeline and Outcomes:** Approximately 65% of systems met the July 15th reporting deadline, with minor delays resolved quickly. ROAP applications were posted as planned, and funds were dispersed by September 3rd, reaching most counties.
 - **Reporting Links and Training:** Agencies received links to ROAP monthly program balance sheets and fiscal year 27 reporting, with upcoming ROAP financial training planned. Agencies should contact their RGS if links are missing.
 - **Transfer and Balance Sheet Guidance:** Casondra advised that fund transfers must be made in the month they occur and will not correct negative balances after expenditures. Agencies should monitor balance sheets and proactively transfer funds as needed.
 - **Timely Report Approval Responses:** Agencies are expected to respond within four days to RGS approval emails to maintain reporting and approval schedules, facilitating easier compliance with future deadlines.
 - **EdTAP Funds Clarification:** Casondra confirmed in response to Blair's question that EdTAP funds cannot be used as the local match for the cost of contracting grant and offered to provide a chart outlining allowable transfers.

Procurement Updates

- **Procurement Updates and Vehicle Ordering Process:** Blair and Chris updated the group on the statewide vehicle contract status, order form distribution, contract timelines, and upcoming procurement training resources, ensuring agencies are informed about ordering procedures and contract transitions.
 - **Statewide Vehicle Contract Status:** The IFB for the new vehicle contract closed on August 24th, and the NCDOT purchasing group is reviewing bids. The current contract remains valid until October, with no expected gap between contracts.
 - **Order Form Distribution:** FY27 vehicle order forms will be distributed by the end of the week to agencies with capital funding, including instructions and policies. Agencies should expect direct communication from Chris.
 - **Procurement Training Resources:** Pre-recorded training videos covering vehicle ordering, sealed bid processes, and procurement pro portal navigation are being developed and will be posted to the IMD procurement page.
 - **Support and Check-In Meetings:** Outstanding questions or concerns regarding procurement will be addressed during monthly grants finance and procurement check-in meetings, and agencies are encouraged to reach out directly for assistance.

Special Project Updates

- **Special Projects and Upcoming Webinars:** Blair announced upcoming webinars, including Cybersecurity Basics for Transit and the Bike/Walk sessions, and provided registration details for the CUTR in-person classes, encouraging agencies to participate and register early.
 - **Cybersecurity Webinar Announcement:** A cybersecurity basics webinar for transit in North Carolina is scheduled for next week, targeting FTA requirements and encouraging rural agencies to attend. Registration links were provided.
 - **CUTR In-Person Training:** CUTR in-person classes will be held October 6th-8th, with a maximum of 30 participants per class. Agencies were advised to register promptly, and links were shared for enrollment.

Training Updates

- **Training Updates and Scheduling:** Kim Angel presented upcoming training sessions, including accident and incident preparedness, cost allocation planning, drug and alcohol program manager training, and the rescheduled R-STEP listening session, outlining registration procedures and participation limits.
 - **Accident and Incident Preparedness:** A virtual training on accident and incident preparedness will be held on September 22nd, led by Lenzy Williams and Kevin Edwards, with instructions to notify Kevin directly in case of casualty losses.
 - **Cost Allocation and Program Income Training:** A virtual training on cost allocation planning with indirect cost and program income is scheduled for October 29th, with registration details to be announced.
 - **Drug and Alcohol Program Manager Training:** Virtual training for drug and alcohol program managers and reasonable suspicion determination will be held in November, with registration opening soon and limited opportunities until March.
 - **R-STEP Listening Session Rescheduling:** The R-STEP listening session, originally scheduled for August, has been rescheduled to November 3rd, with registration limited to 45 participants and automatic updates for those previously registered.
- **Calendar and Reporting Reminders:** Blair concluded with reminders about monthly claims, operational statistics, annual reports, grant application deadlines, upcoming transit calls, and multimodal updates webinars, directing participants to relevant web addresses for further information.
 - **Reporting and Application Deadlines:** August Monthly claims, operational statistics, annual report statistics, and ROAP reports are due by September 30th, with grant applications due October 2nd and the next transit call scheduled for October 14th.
 - **Training Session Dates:** Blair reiterated training dates for TA 101 Module 4, Accident/Incident Preparedness, and CUTR in-person sessions, providing web addresses for registration and information.