

Transit Call Recap – January 14th, 2026

2026 IMD Strategic Goals and Initiatives:

Brennon outlined IMD's main goals for 2026, focusing on financial clarity, logical procurement processes, targeted training, increased field presence, and enhanced visibility, with support from Kenetta, Beth, and the broader IMD team.

- **Financial Clarity and Team Changes:** Brennon discussed the importance of financial clarity for transit agencies, noting the retirement of Myra Freeman and the appointment of Beth Gay as interim finance manager. The team aims to ensure consistent, transparent financial communication and support for agencies statewide.
- **Logical Procurement Processes:** IMD is working with NCDOT's procurement agency to streamline vehicle purchasing contracts, reduce administrative burden, extend contract periods, and include price escalations/deescalations to avoid funding gaps and improve statewide bargaining power.
- **Targeted Training Initiatives:** IMD plans to offer more direct and relevant training opportunities, including annual director boot camps, compliance review preparation, and ongoing basic training for new agency directors, with a focus on financial operations and grant applications.
- **Field Presence and Visibility:** The team will continue increased in-person visits to agency facilities and promote agency achievements through social media channels like X and LinkedIn, aiming to highlight the impact of public transportation and share human-interest stories.

Finance Team Transition and Updates:

Kenetta announced Beth Gay as Interim Finance Manager, and Beth provided updates on claim submissions, program income reporting, and the transition to Smart Sheet surveys, emphasizing deadlines and new processes for agencies.

- **Interim Finance Manager Appointment:** Beth Gay was introduced as the Interim Finance Manager, bringing prior experience and steady leadership to support IMD and transit agencies during the transition period.
- **Upcoming Deadlines and Claims:** Beth reminded agencies of key deadlines: Program Income survey responses due by January 15th, December monthly claims due January 30th, and change requests and claims to be submitted using the new IDP format.
- **Smartsheet Survey Implementation:** IMD is transitioning to Smart Sheet surveys for quarterly Program Income reporting, requiring agencies to respond even if no income is reported, to centralize data and improve visibility for IMD staff.

- **5310 Application and Contracting Process:** The Board approved 5310 applications, and Finance will send contract documents via DocuSign for signature, with a reminder that the Authorized Official cannot witness their own signature.
- **Change Request Deadline Clarification:** Beth clarified in response to a chat question that FY26 change requests should be submitted by the 1st of May, with no exceptions to this deadline. This will allow time for transit agencies to submit their orders and get their final claims in by July 30th.

UGA Program and Grant Application Updates:

Carolyn and Casondra provided updates on the UGA program, including FY27 internship and apprentice applications, Smartsheet submission processes, FY28 program beta testing, and a call for transit system photos for grant materials.

- **FY27 Application Review and Deadlines:** Internship and apprentice applications for FY27 are under review and will be presented to the Board of Transportation by March, with MPOs required to submit 5303 applications via Smartsheet and budget applications due January 30th.
- **Smartsheet Submission Instructions:** Carolyn explained that Smartsheet is now used for grant document submissions, with step-by-step instructions provided and application tables available on the UGA website.
- **FY28 Program Beta Testing and Stakeholder Input:** IMD's internal planning team and external stakeholders are reviewing the UGA program to streamline processes, with a beta test for FY28 scheduled at the end of the month and ongoing incorporation of stakeholder suggestions.
- **Transit System Photo Request:** Carolyn requested agencies submit photos of their transit systems, staff, and riders for inclusion in UGA guidance materials, with external teams voting on submissions for cover and collage pages.

ROAP and SMAP Program Allocations and Reporting:

Casondra detailed ROAP allocations, clarified planning versus actual disbursements, outlined efforts to expedite grant year closeout, and provided guidance on monthly reporting, documentation, and common issues.

- **ROAP Allocation Spreadsheet and Planning Guidance:** Casondra sent agencies a spreadsheet with base allocations for 2024-2026 and a three-year average, clarifying that these figures are for planning only and do not reflect final disbursements, which depend on legislative funding and prior year carryovers.
- **Expediting Disbursements and Process Flow:** IMD is exploring ways to provide ROAP disbursements earlier in the grant year by streamlining the multi-step closeout and setup process, requiring collaboration between agencies, IMD admin, finance, and DOT finance teams.

- **Monthly Reporting Requirements:** ROAP reports are collected monthly, with December reports due January 30th. Agencies must report fund transfers in the month they occur and respond promptly to confirmation emails for final approval and corrections.
- **Documentation and Common Reporting Issues:** Casandra emphasized attaching backup documentation, ensuring trip and fare data are clearly connected, avoiding duplication between transit and non-transit trips, and using the notes section for clarifications to facilitate report approval.

Compliance Review Process and Timeline:

Kevin reported on the completion of 39 compliance reviews, ongoing follow-up for documentation, and preparations for the next review cycle, with support from review teams and compliance analyst Earle McNeil.

- **Review Completion and Follow-Up:** All 39 compliance reviews for the calendar year have been completed, with 29 under documentation review and 10 follow-up letters sent regarding deficiencies; two systems have closed their reviews.
- **Next Review Cycle Preparation:** The team is preparing for the CY26 review cycle, with plans to post the calendar and hold a kickoff meeting, while continuing follow-up for CY25 reviews.
- **Contact and Support:** Kevin advised agencies to reach out to compliance analyst Earle McNeil or any team member for assistance with the review process and documentation requirements.

Statewide Vehicle Procurement and Process Updates:

Blair and Chris updated on the statewide vehicle contract Invitation for Bid (IFB) submission, review timelines, vendor portal posting, and new procurement process requirements, including increased micro-purchase thresholds and use of the ProcurementPro tool.

- **Vehicle Contract IFB Submission and Timeline:** The Invitation for Bid (IFB) for the traditional vehicle contract was submitted to NCDOT Purchasing, with a review expected to take up to four weeks before posting on the vendor portal (North Carolina electronic Vendor Portal - <https://evp.nc.gov/solicitations/>); agencies will be notified via mass email.
- **Large Bus Contract and User Workshop:** The Large Bus Invitation for Bid (IFB) will be reviewed internally, with a user workshop scheduled in the next two weeks to finalize specifications and ensure suitability for agency needs.
- **Formal Solicitation Review Process Changes:** IMD now requires review of procurement and supporting documentation prior to official notification of intent to award, applying to capital and third-party contracts over \$90,000.

- **Micro-Purchase Threshold Increase:** The micro-purchase threshold has been raised from \$10,000 to \$15,000 for procurements after October 1, 2025, reducing prior approval requirements for smaller purchases.
- **ProcurementPro Tool Requirement:** Projects starting in FY26 or later must use the ProcurementPro tool unless using an active statewide term contract, which requires documentation via the procurement checklist and history form.

Training Programs and Upcoming Sessions:

Kim presented updates on training survey results, upcoming financial management and safety webinars, in-person training opportunities, and the schedule for Boot Camp, Transit Academy, and Drug and Alcohol Program Management (DAPM).

- **Annual Training Survey and Data Compilation:** IMD achieved 100% participation in the 2025 Annual Training Survey, with results being compiled and set for sharing at the February monthly call.
- **Financial Management and Safety Training:** A series of financial management trainings will begin in February, covering funding options, allowable costs, and maximizing ROAP and 5310 funds; safety and deescalation webinars are planned in partnership with Cutter, with in-person sessions in the spring.
- **Charter and School Bus Requirements Training:** A training session on charter and school bus transportation requirements is scheduled for January 29th, focusing on regulatory updates and compliance for agencies offering charter services.
- **Boot Camp and Transit Academy Schedule:** New Director's Boot Camp will be held in Raleigh in March. Registration is currently available. Transit Academy is tentatively set to be held in Winston Salem with sessions running from May through October, excluding July; additional passenger assistance and drug & alcohol trainings are planned.

Transportation Leadership Development Program (TLDP):

Jeremy announced the upcoming TLDP session starting in mid-February, with two required in-person seminars and open spots for participants, clarifying the distinction between TLDP and Transit Academy.

- **Program Details and Registration:** TLDP will hold in-person seminars at NCSU University Club in March and April, with registration links provided and a few spots remaining for interested participants.

- **Program Focus and Distinction:** Kimberly clarified that TLDP focuses on leadership development, while Transit Academy centers on federal requirements and grant processes for transit directors.

Transit Planning Needs Survey:

Nikki reminded participants to complete the transit planning needs survey by January 16th, emphasizing its importance for gathering feedback on financial planning, micro transit, and general system needs.

- **Survey Deadline and Participation:** The survey is open until January 16th, targeting transit program directors and those with high-level program views, with an estimated completion time of 30 minutes.
- **Purpose and Impact:** Survey results will inform future programs and events, helping IMD plan for the coming year based on agency feedback.

Upcoming Deadlines and Calendar Reminders:

Blair reviewed key upcoming deadlines for claims, reports, and training sessions, including Charter reports, program income, TDM claims, and the next transit call scheduled for February 11th.

- **Claims and Report Deadlines:** Charter reports, program income, training reports, and TDM claims are due on January 15th; monthly and quarterly claims, op stats, and December ROPE reports are due January 30th; the damage report is due February 13th.
- **Training Session Schedule:** The only training scheduled for January is the Charter school bus training on the 29th, with registration details provided.

Follow-up tasks:

- **Program Income Reporting:** Respond to the Smartsheet survey regarding Q2 program income by the specified deadline. (All agencies with program income)
- **5310 Contract Documents:** Sign and return 5310 contract documents via DocuSign once received, ensuring the authorized official does not witness their own signature. (All agencies receiving 5310 contracts)
- **UGA Program Cover Photo Submission:** Submit transit system photos to Carolyn for consideration in the FY28 UGA program cover and collage pages. (All agencies)
- **ROAP Report Submissions:** Submit outstanding November ROAP reports to facilitate earlier disbursement of funds next year. (Agencies with outstanding November ROAP Reports)
- **FY26 Change Requests:** Submit any final FY26 change requests by the May 1st. (All agencies)

- **Vehicle Procurement Contract Review:** Review and provide feedback on large bus contract specs during the upcoming workshop. (Potential users of the large bus contract)
- **Procurement Process Update:** Review new micro purchase threshold and ensure compliance with updated ProcurementPro tool requirements for procurements after October 1, 2025. (All agencies)
- **Training Survey Results:** Review and discuss the compiled 2025 Annual Training Survey results at the February monthly call. (IMD team)

This recap document, the slideshow and recording for this and all Monthly Transit Calls can be found on our webpage [Transit System Meeting Resources](#) within a few days of the meeting.