Transit Recap – November 10, 2026

Opening Announcements

- **Funding Requests and Budget Priorities:** Brennon outlined IMD's legislative monitoring and four public transportation expansion requests, while emphasizing efforts to reduce internal administrative costs and direct more funding to local transit agencies.
    - **Legislative Monitoring:** Brennon said IMD is monitoring state and federal developments following the elections and will provide legislative updates as roles, contacts, and available public transportation support become clearer. NCPTA is also working on advocacy with local assembly members, congressional representatives, and senators.
    - **Expansion Requests:** IMD submitted four public transportation expansion requests: inflationary funding for ROAP and SMAP based partly on ITRI's analysis of increased transit operating costs, a communications funding pool for two-way radios and mass notification tools, and funding to help agencies implement contactless payments. Brennon noted that current budget conditions make awards uncertain, but IMD will continue documenting agency needs.
    - **Administrative Efficiency:** IMD is reviewing software, spending, and administrative processes to reduce internal costs and make more funding available for transit agencies and projects. Blair was scheduled to provide additional information on administrative process improvements.

- **Finance And Claims Compliance:** Jocelyn Valdez reviewed upcoming claims deadlines, contract follow-up, required file naming and invoice formats, vehicle claim documentation, change-request rules, and correction procedures needed to avoid payment delays.
    - **Claims Deadlines:** November claims are due December 30, 2026. The first change request for the December–January period is also due, and quarterly second-quarter claims are due January 29, 2027.
    - **Contract Follow-Up:** Agencies with outstanding FY27 contracts, or agencies that have not received contracts expected in their records, should contact their accounting specialist for assistance.
    - **File And Invoice Standards:** Claim documents must be attached separately and named according to the finance webpage's naming convention; salaries and fringe under G1213189 are the exception that may be submitted as one attachment. Claims that do not follow the naming process may be returned. The updated invoice number format became effective November 1, 2026: the last five digits of the agreement number followed by the sequential invoice number. Noncompliant formats will begin being returned January 1, 2027.

- **Review Requirements:** Agencies must verify contact information, communicate with claim reviewers, and return corrections within three business days or sooner. Claims containing line-item overdrafts will be returned for adjustment. Vehicle claims require applicable inspection forms, the final vendor invoice, a signed and notarized MVR-1 title application naming NCDOT IMD as first lien holder, insurance information, the original vehicle order form, payment evidence, lettering or logo invoices when applicable, and a procurement letter when required.
- **Change Requests:** A change request reallocates funds among approved budget line items without changing the total approved budget. Agencies should confirm that no claim is in workflow before submitting because EBS may lock balances or prevent correct updates; no more than two change requests are permitted per fiscal year.

- **Grant Programs and Reporting:** Casondra described the FY28 concept and seasonal mobility opportunities, including partner, funding, match, and deadline requirements, and provided ROPE expenditure and reporting updates.
  - **UGA Application Review:** FY27 UGA applications are in review, and agencies must submit and obtain approval for all phase one and phase two documents, including conflict-of-interest forms, current UEI information, organizational records, written applications, and supporting quotes. Agencies with missing documents should receive repeated outreach from their RGS.
  - **Concept Applications:** FY28 concept applications require at least two partners, allow up to $180,000 per partner, and fund operational expenses only. The state/local funding split is 70/30. Applications require a written proposal, an MOU, and certification approving the local match; because of the compressed schedule, draft MOUs and resolutions will be accepted initially but must be finalized before agreements are executed. The deadline is December 18, 2026. In response to Andrew's question, Casondra confirmed that concept funding is limited to operations and does not include previously used expenditure categories outside that scope.
  - **Seasonal Mobility:** The new seasonal mobility program will operate on a calendar-year basis and support supplemental public transportation during peak tourist seasons and eligible events such as festivals, concerts, holidays, and community celebrations. Applicants must already provide regular transportation services; funding cannot support only a single isolated event. Eligible services may include shuttles, trolleys, trams, vans, and buses.
  - **Seasonal Requirements:** Seasonal mobility applications require at least two partners, permit up to $130,000 per partner, and fund operations only. The program provides 100% state funding in calendar years 2027 and 2028, changes to an 85/15 state/local split in 2028, and reaches a 70/30 split beginning in 2029. Applications require a written proposal, budget in EBS, and partner MOUs; a

2027-only application does not require a local match certificate, while a 2028 request requires at least a draft certificate. Casondra confirmed that municipalities and local governments may participate as partners and clarified that the program differs from charter service because it includes established regular routes in addition to special-event service.

- **ROPE Status:** ROAP year-to-date expenditures were approximately $6.25 million, representing 31% of total funding. Approximately $379,000 had been transferred to support local matches for other grant programs, leaving about $3.21 million, or 67%, available. Agencies also covered approximately $719,000 in expenses exceeding allocations, which IMD is tracking as part of its expansion request. EDTAP spent about $2.9 million, Employment about $1 million, and RGP about $2.6 million.
- **Reporting Compliance:** ROAP reporting completion was approximately 98% for July, 97% for August, 88% for September, and 9% for October at the time of the meeting. July through September reports remain overdue for some agencies, and October reports are due November 30, 2026. Fund transfers must be reported in the month they occur so financial records and available balances remain accurate; agencies should respond promptly after RGS review.

- **Vehicle Procurement and Inventory Transition:** Blair explained the status of vehicle procurements and IMD's transition from Asset Works to Smartsheet for vehicle inventory, mileage, and maintenance reporting.
  - **Vehicle Contracts:** The LTV and raised-roof van procurement received nine vendor submissions, compared with four in 2022. IMD sent vendors follow-up questions and expected responses by the end of the week before selecting vendors. The current contract was extended to January 1, 2027, so agencies should place orders under the current contract before it expires. IMD is also nearing completion of the heavy-duty bus invitation for bids and expects to provide an update on the next call.
  - **Smartsheet Transition:** For vehicles purchased with state or federal funding through IMD, vehicle inventory and maintenance reporting will move from Asset Works to Smartsheet. The change is intended to align reporting with FTA requirements, reduce agency burden, replace costly software, and shift preventative-maintenance and lift reporting to a quarterly schedule rather than daily reporting. Mileage reporting will also be quarterly.
  - **Implementation Timeline:** IMD will provide training in December, incorporate agency feedback from November testing, present the platform at the December 9 transit call, and hold a training session December 16. Smartsheet is expected to launch for agency use in December, before the Asset Works contract ends at the end of January. IMD will provide a project overview, training videos, a webinar, resource materials, and office hours.

- **Local Tracking Options:** Agencies may use an optional IMD template to track daily mileage and maintenance for their own records, use maintenance modules already offered by their existing software vendor, or purchase Asset Works or another maintenance system with local funds. Agencies selecting a locally funded system should coordinate with IMD regarding data management.
- **Data Migration:** Blair said the Smartsheet transition will not create an additional cost for agencies. IMD expects to migrate or provide the latest relevant mileage data, archive several years of historical information for the upcoming triennial review, and support release of data if an agency continues using Asset Works with local funds. IMD is still finalizing how vehicle work orders and supporting maintenance documents will be attached.

- **Microtransit and Active Transportation Planning:** Nikki announced 2027 microtransit feasibility-study funding, while Jennifer asked agencies to promote participation in the statewide active transportation plan update.
  - **Microtransit Studies:** IMD will fund up to four 2027 microtransit feasibility studies focused on implementation readiness. Studies may examine public engagement, funding mechanisms, capital needs, and other planning requirements, but will not provide operating or capital funding for service implementation.
  - **Application Timeline:** The microtransit application opened November 10 and closes December 11, 2026. Awards are expected in January, with projects beginning in March and taking approximately 10–12 months. A local match of up to $18,750 is required. Because Smartsheet does not allow applicants to save partially completed forms, Nikki advised applicants to copy the questions into a Word document and paste completed responses into Smartsheet. IMD will distribute follow-up links and FAQs; questions may be directed to Nikki Abija or Brian Lopez.
  - **Active Transportation Plan:** Jennifer Delcourt explained that NCDOT is updating North Carolina's active transportation plan, which was last developed in 2013. Kittleson began the approximately one-year process during the summer, considering population growth, changing networks, e-bikes, scooters, other micromobility devices, and evolving community needs.
  - **Community Story Portal:** Jennifer asked agencies to share the online community-story portal, where residents can answer what would improve walking, biking, or rolling in their communities and describe its future in North Carolina. Selected stories and photographs may appear in the final plan, and respondents may be eligible for a consultant-funded $100 gift card. The submission deadline is December 5, 2026; IMD can provide promotional graphics.

- **Risk Assessment Program:** Blair outlined IMD's expanded FTA-required risk assessment framework, which will score agencies across six factors and guide future training, technical assistance, and resource allocation.
    - **Assessment Factors:** The framework will evaluate organizational stability, operational health, compliance health, asset management, procurement compliance, and grant management. Examples include director tenure, participation in transit calls and required training, financial operations, compliance review findings, reporting such as charter and program income, timely vehicle dispositions, procurement practices, and UGA administration.
    - **Scoring Process:** Each factor will use approximately 10–20 data points, many of which IMD already collects through Smartsheets. Items such as timely financial statements and findings will be converted into weighted scores to create an overall assessment.
    - **Dashboards And Support:** IMD will continue refining data points and scoring over the next two months, conduct an annual survey for information that changes over time, and build dashboards for transit agencies and nonprofit 5310 subrecipients. Agencies will be able to view factor-level scores. IMD will review the final scores and work individually with agencies on improvement areas, technical support, and additional resources or training.

- **Training Schedule and Director Development:** Kim and Blair reviewed imminent compliance trainings and described IMD's 2027 training calendar, including a new recurring boot-camp schedule and a staged development pathway for new directors.
    - **Upcoming Compliance Training:** Drug and alcohol program training will occur Monday through Wednesday next week from 9:00 a.m. to noon, with one registration covering all three days. Reasonable suspicion determination training will occur Thursday from 9:00 a.m. to noon and requires separate registration. This will be the last IMD offering of the drug and alcohol program training until March; staff who need training sooner may use the FTA video or another approved method. In response to a question about missing registration links, Kim said they would check Brandon's email and follow up with Sarah and the other affected participant.
    - **ADA Training:** Implementation of ADA in public transit will be held December 15 from 1:00 to 3:00 p.m. for managers, compliance officers, and coordinators responsible for ADA policies and oversight. The training addresses federal requirements, service animals, personal care attendants, and reasonable modification, rather than operator-focused hands-on passenger assistance training.
    - **2027 Calendar:** IMD is planning January–June 2027 training and expects to circulate a month-by-month outline around the December meeting or mid-December. The majority of sessions will be virtual, with a limited number in person. Additional sessions may be added based on risk-assessment results.

- **Director Pathway:** Boot camp will be offered twice in 2027, in March and October. Transit Academy 101 will not be offered in 2027 and will return in 2028 on an every-other-year cycle. New directors will receive a new-director program during their first six months, attend boot camp approximately six to nine months into employment, and later attend Transit Academy after gaining roughly 12–24 months of experience and exposure to grant cycles. Monthly training will continue for experienced directors as well.

- **Operational Deadlines and Announcements:** Blair highlighted training, reporting, and office-closure reminders and confirmed that the next transit call will occur December 9.
  - **Upcoming Deadlines:** Agencies were reminded to vote daily through November 15 for the MENC grant in AASHTO's 2026 America's Transportation Awards, register quickly for the Advancing Mobility Management class occurring the following day and Friday, and note the November 30 deadlines for monthly claims, October ROPE reports, and October operating-status reports.
  - **Safety And Information:** The final safety-culture training had 36 attendees from 21 organizations. Blair also encouraged agencies to subscribe to the National RTAP newsletter and noted an opportunity for a rural transit agency to participate in National RTAP's 40th-anniversary time capsule.
  - **Calendar Reminders:** IMD offices will close for the state holiday and again November 26–27 for Thanksgiving. The next transit call is scheduled for December 9, 2026.