

Transit Recap – October 14, 2026

Opening Announcements

- **Finance Deadlines and Contract Compliance:** Jocelyn Valdez and Tammy Pritt reviewed upcoming claim deadlines, FY27 contract requirements, file-submission standards, and new invoicing controls that agencies must follow to avoid returned claims and payment delays.
 - **Claim Deadlines:** Jocelyn stated that September monthly claims and quarter-one claims are due October 30. Additional reporting and claim deadlines were also identified for agencies to monitor.
 - **FY27 Contracts:** Agencies with outstanding FY27 contracts should contact their accounting specialist if they will not be able to return a contract within 30 days, provide the reason for the delay, and give an expected return date. Only the authorized official may sign; updated delegation-of-authority forms should be sent to the accounting specialist and RGS. Claims cannot be submitted until the signed contract completes internal approval.
 - **File Naming Standards:** Each required document should be attached separately, except salaries and fringe for G121 through G189. Agencies must include the applicable G-code on each file and use consistent naming across claims; finance staff or accounts payable may return claims that do not follow the process.
 - **Invoice Number Format:** Beginning with the November claim, due December 30, the invoice number must consist of the last five digits of the agreement number followed by the sequential invoice number, such as 01 or 02. The number must appear on the claim cover sheet, claim cover letter, and DBE form; noncompliant claims will be returned.
 - **Payment Tracking:** Tammy explained that the claim cover sheet verifies the payee, address, amount, period, and agreement, while unique invoice numbers allow reports to identify duplicate payments. When ACH information and an active email are on file, remittance advice will identify the invoice number associated with each payment.

- **Grant Applications and ROAP Reporting:** Casondra Hamilton outlined application-review requirements, correction timelines, documentation safeguards, upcoming grant opportunities, and ROAP payment and monthly reporting procedures.
 - **Application Corrections:** Outstanding phase-one documents can delay approval even when other application materials are complete. Documents returned by a regional grant specialist must be corrected and returned within seven calendar days so applications can proceed to BOT board approval, and agreement creation.
 - **Required Documentation:** Applicants should complete the application profile form through line 28 of their Smartsheet workspace and contact their RGS to confirm whether it is on file. Required public-hearing documentation must be uploaded. On program resolutions, the authorized representative and certifying official must be different people, and the notary must also be a different person.
 - **Local Share Certificates:** The amount on a local share certificate may exceed the grant application amount but cannot be lower. If the requested grant amount exceeds the certificate, the applicant must reduce the request or update the certificate, which may delay processing.
 - **Grant Opportunities:** The Internship and Apprentice application deadline was extended to November 2; interested organizations should ask their RGS to create a workspace submission area. ConCPT grant guidance remains under review and the application period is not yet open; Casondra will notify applicants when it opens.
 - **ROAP Disbursements:** Systems approved by August 22 should have received ROAP funding. More recently approved systems had their disbursements keyed at the end of the prior week and should receive ACH payments within the next few weeks.
 - **ROAP Reporting:** ROAP reports are due monthly within 30 days after month-end and multiple months cannot be combined. Funding transfers must be reported in the month they occur; later transfers do not correct prior negative balances or expenses recorded as county funding. After RGS approval, recipients should open the email and review the program balance sheet within four days.

- **Procurement and Vehicle Contract Updates:** Blair reported that procurement staff are clarifying vendor bids, extending the current contract through January, preparing vehicle order forms, and developing related training and documentation.
 - **Bid Clarifications:** The procurement team completed its review of vendor bids and is sending comments to the purchasing group for review. The review involved more than 400 specification issues and included more vendor bids than the previous bid solicitation in 2022.
 - **Contract Extension:** The existing contract was scheduled to expire the following week but will be extended through January, preventing a service gap while the next contract is completed.
 - **Vehicle Orders:** Vehicle order forms are awaiting DOA approval, which Blair expected to receive by the following week. The forms will be distributed after approval.
 - **Procurement Training:** Transit Academy procurement training took place during the meeting. Additional training on vehicle ordering, sealed-bid procedures, and Procurement Pro may be scheduled after the new contract is in place; agencies who were asked for outstanding documentation on previous procurements should respond promptly.
- **Transportation Programs and Funding Opportunities:** Danielle, Dalton, Joseph, and Blair shared updates on the statewide active transportation plan, intercity bus website coordination, feasibility-study grants, Safe Routes to School funding, and related transportation initiatives.
 - **Active Transportation Plan:** Danielle announced development of a new statewide active transportation plan covering walking, biking, and rolling. Work began around August and is expected to take approximately 12 months. The team is collecting stories and photos through December 5 and encouraged transit providers and communities to describe connections between active transportation and transit access.
 - **Intercity Bus Websites:** Dalton contacted 58 transit agencies, universities, and transportation-demand-management programs between October 5 and 12 to request website updates about subsidized intercity bus services. Fourteen agencies had completed updates and 10 were working with IT teams, representing about 40% progress. Dalton will review agency websites at least annually and whenever program maps or services change.

- **Feasibility Study Grants:** Joseph explained that the paved trails and sidewalks feasibility-study program funds the stage between planning and design or construction. Eligible applicants include municipalities, counties, MPOs, RPOs, bicycle and pedestrian agencies, transit agencies, advocacy groups, trail organizations, and land conservancies. Small studies generally receive \$60,000-\$80,000 and large studies \$80,000-\$120,000; applications are open through November 6 at 11:59 p.m., with selections in November or early December, board approval in December, and notices to proceed expected in January.
- **Safe Routes Grants:** Blair stated that the Safe Routes to School Planning and Programming Grant opened October 5 and closes November 6 at 11:59 p.m. Proposed awards range from \$25,000 to \$300,000 for 18-month projects, funded with Transportation Alternatives Program funds at an 80/20 ratio.
- **Election Transportation:** Blair reminded agencies that existing fare-free election-day guidance remains applicable and covers rules and strategies for transporting people to election sites. Agencies with questions should contact the team.
- **Training and Reporting Calendar:** Blair reviewed upcoming NTI and IMD training opportunities, the R-STEP listening session, drug-and-alcohol courses, immediate reporting deadlines, and the next transit call.
 - **NTI Courses:** Advancing Mobility Management is scheduled for November 12-13 at ITRI, with registration available now. Participants without an NTI profile must create one before registering. A risk-assessment course for transit capital projects is planned for March at Raleigh Union Station with Go Raleigh; registration is expected to open November 2.
 - **IMD Training:** A virtual two-hour course on cost allocation planning, indirect costs, and program income is scheduled for the end of October for finance directors, accountants, directors, and grant managers. The R-STEP listening session is November 3; people already enrolled do not need to register again. Drug and alcohol program training is November 16-18, followed by virtual reasonable-suspicion training on the Friday.
 - **Immediate Deadlines:** Program income, charter reporting, training, and vehicle, lift, and TDM claims are due October 15. September monthly claims,

quarterly claims, September monthly operating statistics, annual operating statistics, and the September monthly report are due October 30.

- **Schedule Changes:** The next transit call is Tuesday, November 10, at the usual time, one day earlier because November 11 is a state holiday. The office will be closed on Wednesday, November 11.
- **Customer Service Survey:** Rachel reminded agencies that the anonymous annual IMD customer service survey is open through October 21 and will inform future customer-service training.
 - **Survey Participation:** The survey takes approximately 15 minutes, all questions are optional, and responses are anonymous. Rachel reported 79 responses toward a goal of 142, representing 20% of the surveys distributed, and asked participants to complete the survey by October 21.
- **America's Transportation Awards:** Blair announced that an NCDOT project is among the 12 finalists for AASHTO's 2026 America's Transportation Awards and shared the voting link.
 - **Public Voting:** Blair encouraged participants to review the finalist information and vote for North Carolina using the direct voting link shared in the meeting chat.