



**DATE:** August 5, 2025  
**TO:** Orange County Staff Working Group  
**FROM:** Caroline Dwyer, Chapel Hill Transit  
**RE:** Requested Amendments to FY26 Orange County Annual Transit Workplan

**REQUEST SUMMARY**

Chapel Hill Transit (CHT) is requesting the following amendment to a capital project included in the FY 2026 Orange County Annual Transit Workplan, as further described in this memo. This amendment clarifies the name and description of a project in Orange County’s adopted FY26 Annual Transit Workplan. No other changes are requested.

<b>TYPE</b>	<b>EXISTING PROJECT</b>	<b>EXISTING DESCRIPTION</b>	<b>ID</b>	<b>AMOUNT</b>	<b>NOTES</b>
Existing project	Route NS Vehicles	Vehicle acquisitions	26CHTVP15	\$2,065,267	Previously two projects (26CHTVP15 and 25CHTVP15), combined into one project in the FY26 AWP

**NEED**

***Amendment to Existing Project: Name & Scope Change***

We are requesting to amend the FY26 Annual Transit Workplan to more explicitly describe the use and purpose of already-allocated funding and to incorporate NSBRT’s progress, which will replace CHT’s existing NS Route. CHT must clearly demonstrate all NSBRT funding sources to the Federal Transit Administration (FTA) as part of the project’s risk and readiness reviews; this amendment clarifies CHT’s intended use of the allocated funding and demonstrates the funding’s availability to FTA.

<b>TYPE</b>	<b>EXISTING PROJECT</b>	<b>EXISTING DESCRIPTION</b>	<b>ID</b>	<b>AMOUNT</b>	<b>NOTES</b>
Requested Amendment	Route NSBRT Vehicles	Vehicle acquisitions for NSBRT	26CHTVP15	\$2,065,267	Previously two projects (26CHTVP15 and 25CHTVP15), combined into one project in the FY26 AWP

**Fiscal impact on FY26 Orange County Annual Transit Work Plan budget: \$0**

REQUEST #	FY 2026	FY START DATE	
26CHTVP15	Orange Transit Work Plan Project Amendment Request Form Operating and/or Capital	Jul	2025

Type of Amendment      Minor       Major

**Minor Amendments:**

- a. An amendment that requires a transfer between budget ordinance appropriations but requires less than a 20% change to a project appropriation for projects equal to or less than \$250,000;
- b. Changes to any adopted financial assumptions supporting the applicable Work Program that does not have a significant impact on the overall revenue or expenditure forecast, which is defined to be no more than a one percent (1%) over the life of the plan;
- c. Changes in reporting requirements for performance on implementation elements authorized in the applicable Work Program;
- d. Changes in funding amounts less than \$250,000 for implementation elements programmed in future fiscal years;
- e. Any other change that does not meet any of the criteria of a Minor Amendment is a Major Amendment.

**Major Amendments are required when:**

- a. A project requested to be added to the Work Plan
- b. A project requested to be removed from the Work Plan
- c. Changes to any adopted financial assumptions supporting the applicable Work Program that does have a significant impact on the overall revenue or expenditure forecast, which is defined to be over one percent (1%) over the life of the plan;
- d. Changes in scope for implementation elements programmed in current and future fiscal years;
- e. Any amendment that requires a transfer of funds between capital or operating funding categories
- f. Any change that requires a change in budgeted reserves or fund balance.

These definitions are based on the Orange County Transit Work Plan Amendment Policy Update, which gives more clarity to the definitions without changing their meaning.

New/Amended Project Name	Requesting Agency	Project Contact	Estimated Operating Cost	
Route NSBRT Vehicles	Chapel Hill Transit	Caroline Dwyer <a href="mailto:cdwyer@townofchapelhill.org">cdwyer@townofchapelhill.org</a>	Base Year	
			FY 2025	
			Cumulative	
Estimated Start Date	Estimated Completion	Notes	Capital Cost	
Jul-25	Jan-29		Base Year	\$ 2,065,267
			Cumulative	\$ 2,065,267
Project Description/Scope		Enter below a summary of the project amendment and impact on approved plan.		
Amend project description and scope to clarify use of funds				
1. Enter Orange Transit Project ID(s) to Increase				

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes

TOTAL

2. Orange Transit Project ID(s) to Reduce					
Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes

TOTAL

3. Impact on Transit Plan Project Costs			
From above, indicate whether amounts impact operating or capital budgets in Orange Transit Plan.	Estimated Operating Cost	Current Year Recurring	\$ -
	Estimated Capital Cost	Base Year Cumulative	No changes to project cost

4. Is this project Operating, Capital or Both?      Operating       Capital       Both

5. What is the timeframe for the request? Are you requesting a full year of funds or a partial year to be annualized in future fiscal years?

No changes requested

6. What is the expected outcome(s) if this request is funded? What is the alternative if the request is not funded?

N/A

7. List any other relevant information not addressed.

This amendment request has no fiscal impact on the adopted transit plan.

8. Please enter estimated appropriations to support expenses. Enter FY 2024 and the estimated annualized cost in FY 2025 using the 2.5% growth factor, if applicable. The spreadsheet will calculate 2026 and beyond by 2.5%. If your project is not expected to have recurring costs in FY 2026 and/or beyond, delete the calculation(s) in columns E-H.

Cost Break Down of Project Request							
OPERATING COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Growth Factors	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%
Salary & Fringes					-	-	-
Contracts				-	-	-	-
Bus Operations:							
Estimated Hours			-	-	-	-	-
Cost per Hour							
Estimated Operating Cost	-	-	-	-	-	-	-
Bus Leases			-	-	-	-	-
Park & Ride Lease			-	-	-	-	-
Other			-	-	-	-	-
Other			-	-	-	-	-
Subtotal: Bus Operations	-	-	-	-	-	-	-
Other (Describe)			-	-	-	-	-
Other (Describe)			-	-	-	-	-
<b>TOTAL OPERATING COSTS</b>		-	-	-	-	-	-

9. Please enter estimated appropriations to support contractual commitments and other expenses related to proposed capital projects.

CAPITAL COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Planning							
Design							
Construction							
Vehicles	2,065,267						
Land - Right of Way							
Other							
<b>TOTAL CAPITAL COSTS</b>	<b>2,065,267</b>	-	-	-	-	-	-

Assumptions for Costs and Revenues Above:

10. Please state any assumption(s) used to calculate the capital and operating dollars and revenues shown above. (include details)

N/A



**DATE:** September 3, 2025  
**TO:** Orange County Staff Working Group  
**FROM:** Caroline Dwyer, Chapel Hill Transit  
**RE:** Requested Amendments to FY26 Orange County Annual Transit Workplan

**REQUEST SUMMARY**

Chapel Hill Transit (CHT) is requesting the following amendments to projects included in the FY 2026 Orange County Annual Transit Workplan, as further described in this memo. This amendment reallocates operating funds to capital funds with net zero fiscal impact on current and future AWP's.

DESCRIPTION	ID	AMENDMENT REQUEST AMOUNT	NOTES
Route CW: Improve Midday Service	23CHTTS01	(\$749,993)	Reflects allocations in FY26-29
Route HS: Weekend Service	24CHTTS01	(\$629,250)	Reflects allocations in FY26-29
Route NS: Eubanks-Southern Village	26CHTTS13	(\$992,439)	Reflects allocations in FY26-29
Route D: UNC-Patterson Place	26CHTTS14	(\$1,393,729)	Reflects allocations in FY26-29
BRT - North-South	20CHTCD03	\$3,765,411	Reflects allocations in FY26-29
<b>NET AMENDMENT</b>		<b>\$0.00</b>	

**NEED**

***Amend Existing Projects to Reallocate Funding to NSBRT***

We are requesting to amend the FY26 Annual Transit Workplan to reallocate committed operating funding to CHT's NSBRT capital project. Prior to requesting a Small Starts Grant Agreement from the Federal Transit Administration (FTA), CHT must clearly demonstrate that all local NSBRT funding is committed. This request reallocates funding from projects that CHT has been unable to implement due to ongoing operator shortages to the NSBRT project, filling a funding availability gap that must be closed before the project will be considered for federal funding. This request has a net zero fiscal impact on the transit plan, and we are not requesting changes to the timing of fund allocation.

ID	EXISTING PROJECT	FY26	FY27	FY28	FY29	TOTAL
23CHTTS01	Route CW: Improve Midday Service	(\$102,750)	(\$210,443)	(\$215,700)	(\$221,100)	(\$749,993)
24CHTTS01	Route HS: Weekend Service	(\$86,150)	(\$176,600)	(\$181,000)	(\$185,500)	(\$629,250)
26CHTTS13	Route NS: Eubanks-Southern Village		(\$322,679)	(\$330,740)	(\$339,020)	(\$992,439)
26CHTTS14	Route D: UNC-Patterson Place		(\$453,153)	(\$464,474)	(\$476,102)	(\$1,393,729)



20CHTCD03	BRT – North-South	\$188,900	\$1,162,875	\$1,191,914	\$1,221,722	\$3,765,411
-----------	-------------------	-----------	-------------	-------------	-------------	-------------

**Fiscal impact on Orange County Annual Transit Work Plan budget: \$0**

<b>REQUEST #</b>	<b>FY 2026</b>	<b>FY START DATE</b>
20CHTCD03	<b>Orange Transit Work Plan Project Amendment Request Form Operating and/or Capital</b>	Jul 2025

Type of Amendment    Minor                       Major

**Minor Amendments:**

- a. An amendment that requires a transfer between budget ordinance appropriations but requires less than a 20% change to a project appropriation for projects equal to or less than \$250,000;
- b. Changes to any adopted financial assumptions supporting the applicable Work Program that does not have a significant impact on the overall revenue or expenditure forecast, which is defined to be no more than a one percent (1%) over the life of the plan;
- c. Changes in reporting requirements for performance on implementation elements authorized in the applicable Work Program;
- d. Changes in funding amounts less than \$250,000 for implementation elements programmed in future fiscal years;
- e. Any other change that does not meet any of the criteria of a Minor Amendment is a Major Amendment.

**Major Amendments are required when:**

- a. A project requested to be added to the Work Plan
- b. A project requested to be removed from the Work Plan
- c. Changes to any adopted financial assumptions supporting the applicable Work Program that does have a significant impact on the overall revenue or expenditure forecast, which is defined to be over one percent (1%) over the life of the plan;
- d. Changes in scope for implementation elements programmed in current and future fiscal years;
- e. Any amendment that requires a transfer of funds between capital or operating funding categories
- f. Any change that requires a change in budgeted reserves or fund balance.

These definitions are based on the Orange County Transit Work Plan Amendment Policy Update, which gives more clarity to the definitions without changing their meaning.

ew/Amended Project Nam	Requesting Agency	Project Contact	Estimated Operating Cost	
BRT - North-South	Chapel Hill Transit	Caroline Dwyer <a href="mailto:cdwyer@townofchapelhill.org">cdwyer@townofchapelhill.org</a>	Base Year	
			FY 2025	
			Cumulative	
Estimated Start Date	Estimated Completion	Notes	Capital Cost	
Jan-26	Jan-29		Base Year	\$ 3,765,411
			Cumulative	\$ 3,765,411
Project Description/Scope				
Enter below a summary of the project amendment and impact on approved plan.				
Reallocate operating funds to capital funds to mitigate NSBRT cost increases without requesting additional funding from the OCTP. This amendment has a net zero fiscal impact on the Transit Plan and does not change the years that funds are available to CHT.				
1. Enter Orange Transit Project ID(s) to Increase				

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes
20CHTCD03	BRT - North-South	BRT	\$3,765,411		This request moves operating funds currently allocated in FY26-FY29. CHT has been unable to implement these projects due to ongoing operator shortages.
<b>TOTAL</b>			<b>\$ 3,765,411</b>		

**2. Orange Transit Project ID(s) to Reduce**

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes
23CHTTS01	Route CW: Improve Midday	Transit Operations	\$ 749,993		Total allocated, FY26-FY29
24CHTTS01	Route HS: Weekend Service	Transit Operations	\$ 629,250		Total allocated, FY26-FY29
26CHTTS13	Route NS: Eubanks-Southern	Transit Operations	\$ 992,439		Total allocated, FY27-FY29
26CHTTS14	Route D: UNC-Patterson	Transit Operations	\$ 1,393,729		Total allocated, FY27-FY29
<b>TOTAL</b>			<b>(\$3,765,411)</b>		

**3. Impact on Transit Plan Project Costs**

From above, indicate whether amounts impact operating or capital budgets in Orange Transit Plan.	Estimated Operating Cost	Current Year	\$ (188,900.00)
		FY27-FY29	\$ (3,576,511)
Estimated Capital Cost	Base Year	\$ 188,900	
	Cumulative	\$ 3,765,411	

4. Is this project Operating, Capital or Both?    Operating     Capital     Both

5. What is the timeframe for the request? Are you requesting a full year of funds or a partial year to be annualized in future fiscal years?

Funds are requested for fiscal years 2026-2029

6. What is the expected outcome(s) if this request is funded? What is the alternative if the request is not funded?

CHT plans on submitting an FTA grant request before the end of calendar year 2025. Failure to secure all required local funding will delay this request and impact NSBRT's construction schedule.

7. List any other relevant information not addressed.

This amendment request reallocates funds committee to CHT and has no fiscal impact on the adopted transit plan.

8. Please enter estimated appropriations to support expenses. Enter FY 2026 and the estimated annualized cost in FY 2027 using the 2.5% growth factor, if applicable. The spreadsheet will calculate 2028 and beyond by 2.5%. If your project is not expected to have recurring costs in FY 2028 and/or beyond, delete the calculation(s) in columns E-H.

Cost Break Down of Project Request							
OPERATING COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Growth Factors	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%	2.50%
Salary & Fringes					-	-	-
Contracts				-	-	-	-
Bus Operations:							
Estimated Hours			-	-	-	-	-
Cost per Hour							
Estimated Operating Cost	\$ (188,900.00)	\$ (1,162,875.00)	\$ (1,191,914.00)	\$ (1,221,722.00)	-	-	-
Bus Leases			-	-	-	-	-
Park & Ride Lease			-	-	-	-	-
Other			-	-	-	-	-
Other			-	-	-	-	-
Subtotal: Bus Operations	(188,900)	(1,162,875)	(1,191,914)	(1,221,722)	-	-	-
Other (Describe)			-	-	-	-	-
Other (Describe)			-	-	-	-	-
<b>TOTAL OPERATING COSTS</b>	<b>(188,900)</b>	<b>(1,162,875)</b>	<b>(1,191,914)</b>	<b>(1,221,722)</b>	<b>-</b>	<b>-</b>	<b>-</b>

9. Please enter estimated appropriations to support contractual commitments and other expenses related to proposed capital projects.

CAPITAL COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Planning							
Design							
Construction	\$ 188,900.00	\$ 1,162,875.00	\$ 1,191,914.00	\$ 1,221,722.00			
Vehicles							
Land - Right of Way							
Other							
<b>TOTAL CAPITAL COSTS</b>	<b>\$ 188,900.00</b>	<b>\$ 1,162,875.00</b>	<b>\$ 1,191,914.00</b>	<b>\$ 1,221,722.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

Assumptions for Costs and Revenues Above:

10. Please state any assumption(s) used to calculate the capital and operating dollars and revenues shown above. (include details)

N/A

MEMO

Date: August 29, 2025

From: Jay Heikes, GoTriangle

Re: Q2 Amendment Request for FY26 Orange Transit Workprogram – Route 800

The Orange Transit Plan funds expansion service in Orange County on Route 800. Route 800 provides all-day/every-day regional connections along NC-54 and I-40 between UNC Hospitals and Regional Transit Center and serves people traveling between Chapel Hill, Southpoint, RTP, and Raleigh at off-peak times. Substantial growth continues to occur along the corridor, driving demand for Orange County residents, employees, and visitors to travel along this corridor. This project includes all off-peak span and frequency improvements to GoTriangle Route 800 (Chapel Hill - Southpoint - RTC) since the Tax District began providing funding for it. On Route 800:

- Weekday midday frequency was increased from 60 to 30 minutes.
- Saturday daytime frequency was increased from 60 to 30 minutes.
- Saturday evening service was extended from 7:15 PM to 11:20 PM.
- Sunday service was added from 6:45 AM to 10 PM.

Costs are allocated 50% to Durham County and 50% to Orange.

This request is for additional resources maintain on-time performance on Route 800 while still delivering frequency and span consistent with the Orange Transit Plan. This request is for five additional revenue hours on Route 800 to provide sufficient cycle time, inclusive of run-time, schedule recovery, and layover time to account for increasingly variable and congested travel times. Cycle times (round trip + layovers) are routinely exceeding 120 minutes, resulting in late trips. Adding a fifth vehicle to Route 800 will enable the route to stay within its cycle time and prevent cascading delays on weekday afternoons. It will ensure that riders are able to reliably make transfers from Route 800 to Chapel Hill Transit and OCPT Routes in Chapel Hill, GoDurham Routes in Durham along NC 54, and other GoTriangle Routes at Regional Transit Center. This request includes a partial year of incremental costs in FY26, starting in December, and a full year of future year costs for Route 800 improvements.

Project ID	FY 2026	FY START DATE
20GOTTS2	Orange Transit Work Plan Project Amendment Request Form Operating and/or Capital	Jul 2025

Type of Amendment:  Minor  Major

- Minor Amendments:**
- a. An amendment that requires a transfer between budget ordinance appropriations but requires less than a 20% change to a project appropriation for projects equal to or less than \$250,000;
  - b. Changes to any adopted financial assumptions supporting the applicable Work Program that does not have a significant impact on the overall revenue or expenditure forecast, which is defined to be no more than a one percent (1%) over the life of the plan;
  - c. Changes in reporting requirements for performance on implementation elements authorized in the applicable Work Program;
  - d. Changes in funding amounts less than \$250,000 for implementation elements programmed in future fiscal years;
  - e. Any other change that does not meet any of the criteria of a Minor Amendment is a Major Amendment.

- Major Amendments are required when:**
- a. A project requested to be added to the Work Plan
  - b. A project requested to be removed from the Work Plan
  - c. Changes to any adopted financial assumptions supporting the applicable Work Program that does have a significant impact on the overall revenue or expenditure forecast, which is defined to be over one percent (1%) over the life of the plan;
  - d. Changes in scope for implementation elements programmed in current and future fiscal years;
  - e. Any amendment that requires a transfer of funds between capital or operating funding categories
  - f. Any change that requires a change in budgeted reserves or fund balance.

These definitions are based on the Orange County Transit Work Plan Amendment Policy Update, which gives more clarity to the definitions without changing their meaning.

New/Amended Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Route 800 Improvements	GoTriangle	Jay Heikes <a href="mailto:jheikes@gotriangle.org">jheikes@gotriangle.org</a>	Base Year (FY 2026)	\$ 123,370
			FY 2027	\$ 216,878
			Cumulative FY28-FY32	\$ 1,508,728
			Orange Transit Estimated Capital Cost	
			Base Year (FY 2026)	\$ -
			Cumulative FY27-FY32	\$ -

**Project Description/Scope**  
Enter below a summary of the project amendment and impact on approved plan.

This request is for additional resources maintain on-time performance on Route 800 while still delivering frequency and span consistent with the Orange Transit Plan. This request is for five additional revenue hours during weekday afternoons on Route 800 to provide sufficient cycle time, inclusive of run-time, schedule recovery, and layover time to account for increasingly variable and congested travel times. This request includes a partial year of incremental costs in FY26, starting in December, and a full year of future year costs for Route 800 improvements.

Route 800 provides all-day/every-day regional connections along NC-54 and I-40 between UNC Hospitals and Regional Transit Center and serves people traveling between Chapel Hill, Southpoint, RTP, and Raleigh at off-peak times. Substantial growth continues to occur along the corridor, driving demand for Orange County residents, employees, and visitors to travel along this corridor. This project includes all off-peak span and frequency improvements to GoTriangle Route 800 (Chapel Hill - Southpoint - RTC) since the Tax District began providing funding for it. On Route 800:

- Weekday midday frequency was increased from 60 to 30 minutes.
- Saturday daytime frequency was increased from 60 to 30 minutes.
- Saturday evening service was extended from 7:15 PM to 11:20 PM.

**1. Enter Orange Transit Project ID(s) to Increase**

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes
20GOTTS2	Route 800	Transit Service	\$ 123,370	\$216,878	
<b>TOTAL</b>			<b>\$ 123,370</b>	<b>\$ 216,878</b>	

**2. Orange Transit Project ID(s) to Reduce**

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes
<b>TOTAL</b>			<b>\$ -</b>	<b>\$ -</b>	

**3. Impact on Transit Plan Project Costs**

From above, indicate whether amounts impact operating or capital budgets in Orange Transit Plan.	Estimated Operating Cost	
	Current Year	\$ 123,370
	Recurring	\$ 216,878
	Base Year	\$ -
	Cumulative	\$ -

4. Is this project Operating, Capital or Both?  Operating  Capital  Both

5. What is the timeframe for the request? Are you requesting a full year of funds or a partial year to be annualized in future fiscal years?

Half Year FY26, Full Year in FY27 and forward

6. What is the expected outcome(s) if this request is funded? What is the alternative if the request is not funded?

If this request is funded, GoTriangle will extend the duration that a fifth vehicle operates on Route 800, providing improved on-time performance on Weekdays. If this request is not funded either 1) Route 800 will continue to have insufficient resources to maintain on-time performance or 2) Span and/or frequency will be reduced to add additional run-time to maintain on-time performance.

7. List any other relevant information not addressed.

Cycle times (round trip + layovers) are routinely exceeding 120 minutes resulting in late trips. Adding a fifth vehicle to Route 800 will enable the route to stay within its cycle time and prevent cascading delays on weekday afternoons. It will ensure that riders are able to reliably make transfers from Route 800 to Chapel Hill Transit and OCPRT Routes in Chapel Hill, GoDurham Routes in Durham along NC 54, and other GoTriangle Routes at Regional Transit Center.

8. Please enter estimated appropriations to support expenses. Enter FY 2026 and the estimated annualized cost in FY 2027 using the 2.5% growth factor, if applicable. The spreadsheet will calculate 2028 and beyond by 2.5%. If your project is not expected to have recurring costs in FY 2027 and/or beyond, delete the calculation(s) in columns E-I.

Cost Break Down of Project Request							
OPERATING COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Growth Factors			2.50%	2.50%	2.50%	2.50%	2.50%
Salary & Fringes			-	-	-	-	-
Contracts			-	-	-	-	-
Bus Operations:							
Estimated Hours			-	-	-	-	-
Cost per Hour			-	-	-	-	-
Estimated Operating Cost			-	-	-	-	-
Bus Leases			-	-	-	-	-
Park & Ride Lease			-	-	-	-	-
Other			-	-	-	-	-
Other			-	-	-	-	-
Subtotal: Bus Operations	765,401	874,959	896,833	919,254	942,235	965,791	989,936
Operating Fare Collection			-	-	-	-	-
Operating Youth GoPass			-	-	-	-	-
<b>TOTAL OPERATING COSTS</b>	<b>765,401</b>	<b>874,959</b>	<b>896,833</b>	<b>919,254</b>	<b>942,235</b>	<b>965,791</b>	<b>989,936</b>

9. Please enter estimated appropriations to support contractual commitments and other expenses related to proposed capital projects.

CAPITAL COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Planning							

Design								
Construction								
Equipment								
Land - Right of Way								
Other								
<b>TOTAL CAPITAL COSTS</b>	-	-	-	-	-	-	-	-

**Assumptions for Costs and Revenues Above:**

**10. Please state any assumption(s) used to calculate the capital and operating dollars and revenues shown above. (include details)**

Values in table 8 reflect total cost of Route 800. Incremental costs are reflected in tables 1 - 3 and in project sheet header block.

MEMO

Date: August 29, 2025

From: Meg Scully, Jay Heikes, GoTriangle

Re: Q2 Amendment Request for FY26 Orange Transit Workprogram – GoTriangle Service Planning Staff

The Orange Transit Plan funds expansion services in Orange County. For example, GoTriangle receives funding for bus service provided to Orange County residents and visitors on the 400, 800, CRX, and ODX. A service planning team member must develop and plan these services through external coordination with transit plan partners, stakeholders, riders, and the public through transit plan updates, short range service plans, annual work programs. A service planning team member must prepare and implement new expansion services including realignments, stop changes, span and frequency changes, and timing changes by following established coordination and engagement practices among transit plan partners, stakeholders, riders, and the public; preparing required service analysis, prepare materials for review by governing bodies, and final alignments, route schedules, vehicle schedules, and operator schedules. A service planning team member must monitor the performance of the service to make adjustments to schedules and patterns to optimize the efficiency and effectiveness of the service to ensure that the service is delivered in a satisfactory manner. The Service Planning Team also conducts data analysis and prepares budgets and reports for these services.

This request is for a new project to fund a portion of an FTE (0.34 FTE) to support that work. Wake County Transit Plan already funds 1 FTE and GoTriangle will request funding from the Durham County Transit Plan for 0.66 FTE as well. The average budget for salary and benefits of the four-member service planning team at GoTriangle is \$111,494. 34% of this amount is \$37,908 and will be requested in FY26 as the fourth staff person on this team started in July 2025. This FTE allocation of 0.34 will be split among the four employees equally to reflect the balance of work undertaken by members of the team. In FY27 the service planning team will oversee the delivery of 200,000 revenue hours of service affected by transit plan funded expansion. Using the estimate of revenue hours per service planner, included in the 2018 Wake Transit Staffing Study, transit plan funding is warranted for two positions. Based among the split of revenue hours among the counties GoTriangle proposes to fund the 2 positions as follows: Wake 1, Durham 0.66, Orange 0.34

Project ID	FY 2026	FY START DATE
New	Orange Transit Work Plan Project Amendment Request Form Operating and/or Capital	Jul 2025

Type of Amendment:  Minor  Major

**Minor Amendments:**

- a. An amendment that requires a transfer between budget ordinance appropriations but requires less than a 20% change to a project appropriation for projects equal to or less than \$250,000;
- b. Changes to any adopted financial assumptions supporting the applicable Work Program that does not have a significant impact on the overall revenue or expenditure forecast, which is defined to be no more than a one percent (1%) over the life of the plan;
- c. Changes in reporting requirements for performance on implementation elements authorized in the applicable Work Program;
- d. Changes in funding amounts less than \$250,000 for implementation elements programmed in future fiscal years;
- e. Any other change that does not meet any of the criteria of a Minor Amendment is a Major Amendment.

**Major Amendments are required when:**

- a. A project requested to be added to the Work Plan
- b. A project requested to be removed from the Work Plan
- c. Changes to any adopted financial assumptions supporting the applicable Work Program that does have a significant impact on the overall revenue or expenditure forecast, which is defined to be over one percent (1%) over the life of the plan;
- d. Changes in scope for implementation elements programmed in current and future fiscal years;
- e. Any amendment that requires a transfer of funds between capital or operating funding categories
- f. Any change that requires a change in budgeted reserves or fund balance.

These definitions are based on the Orange County Transit Work Plan Amendment Policy Update, which gives more clarity to the definitions without changing their meaning.

New/Amended Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Service Planning Staff - 0.34 FTE	GoTriangle	Jay Heikes <a href="mailto:jheikes@gotriangle.org">jheikes@gotriangle.org</a>	Base Year (FY 2026)	\$ 37,908
			FY 2027	\$ 38,856
			Cumulative FY28-FY32	\$ 286,108
			Orange Transit Estimated Capital Cost	
			Base Year (FY 2026)	\$ -
			Cumulative FY27-FY32	\$ -

**Project Description/Scope**  
Enter below a summary of the project amendment and impact on approved plan.

The Orange Transit Plan funds expansion services in Durham County. For example, GoTriangle receives funding for bus service provided to Orange County residents and visitors on the 400, 800, 700, CRX and ODX. A service planning team member must develop and plan these services through external coordination with transit plan partners, stakeholders, riders, and the public through transit plan updates, short range service plans, annual work programs. A service planning team member must prepare and implement new expansion services including realignments, stop changes, span and frequency changes, and timing changes by following established coordination and engagement practices among transit plan partners, stakeholders, riders, and the public; preparing required service analysis, prepare materials for review by governing bodies, and final alignments, route schedules, vehicle schedules, and operator schedules. A service planning team member must monitor the performance of the service to make adjustments to schedules and patterns to optimize the efficiency and effectiveness of the service to ensure that the service is delivered in a satisfactory manner. The Service Planning Team also conducts data analysis and prepares budgets and reports for these services.

**1. Enter Orange Transit Project ID(s) to Increase**

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes
<b>TOTAL</b>					

**2. Orange Transit Project ID(s) to Reduce**

Project ID	Project	Appropriation Category	Amount	Recurring Amount	Notes
<b>TOTAL</b>					

**3. Impact on Transit Plan Project Costs**

From above, indicate whether amounts impact operating or capital budgets in Orange Transit Plan.	Estimated Operating Cost	Current Year	
			\$ 37,908
		Recurring (FY27)	\$ 38,856
	Estimated Capital Cost	Base Year	\$ -
		Cumulative	\$ -

4. Is this project Operating, Capital or Both?  Operating  Capital  Both

5. What is the timeframe for the request? Are you requesting a full year of funds or a partial year to be annualized in future fiscal years?

To begin July 2025 and reoccur every year.

6. What is the expected outcome(s) if this request is funded? What is the alternative if the request is not funded?

Completion of service planning tasks is essential to the sustainable and reliable delivery of expansion bus service in Durham County. If service planning is not undertaken, then service delivery, monitoring and reporting does not occur.

7. List any other relevant information not addressed.

8. Please enter estimated appropriations to support expenses. Enter FY 2026 and the estimated annualized cost in FY 2027 using the 2.5% growth factor, if applicable. The spreadsheet will calculate 2028 and beyond by 2.5%. If your project is not expected to have recurring costs in FY 2027 and/or beyond, delete the calculation(s) in columns E-I.

Cost Break Down of Project Request							
OPERATING COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Growth Factors			2.50%	2.50%	2.50%	2.50%	2.50%
Salary & Fringes	37,908	38,856	39,827	40,823	41,843	42,889	43,962
Contracts	-	-	-	-	-	-	-
Bus Operations:							
Estimated Hours	-	-	-	-	-	-	-
Cost per Hour	-	-	-	-	-	-	-
Estimated Operating Cost	-	-	-	-	-	-	-
Bus Leases	-	-	-	-	-	-	-
Park & Ride Lease	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-
Subtotal: Bus Operations	-	-	-	-	-	-	-
Operating Fare Collection	-	-	-	-	-	-	-
Operating Youth GoPass	-	-	-	-	-	-	-
<b>TOTAL OPERATING COSTS</b>	<b>37,908</b>	<b>38,856</b>	<b>39,827</b>	<b>40,823</b>	<b>41,843</b>	<b>42,889</b>	<b>43,962</b>

9. Please enter estimated appropriations to support contractual commitments and other expenses related to proposed capital projects.

CAPITAL COSTS	FY26	FY27	FY28	FY29	FY30	FY31	FY32
Planning							
Design							
Construction							
Equipment							
Land - Right of Way							

Other								
<b>TOTAL CAPITAL COSTS</b>	-	-	-	-	-	-	-	-

**Assumptions for Costs and Revenues Above:**

**10. Please state any assumption(s) used to calculate the capital and operating dollars and revenues shown above. (include details)**

This request is for a new project to fund a portion of an FTE to support that work. Wake County Transit Plan already funds 1 FTE and GoTriangle will request funding from the Durham County Transit Plan for 0.66 FTE as well. The average budget for salary and benefits of the four member service planning team at GoTriangle is \$111,494. 66% of this amount is \$73,586 and will be requested in FY26 as the fourth staff person on this team started in July 2025. This FTE allocation of 0.34 will be split among the four employees equally to reflect the balance of work undertaken by members of the team. In FY27 the service planning team will oversee the delivery of 200,000 revenue hours of service affected by transit plan funded expansion. Using the estimate of revenue hours per service planner, included in the 2018 Wake Transit Staffing Study, transit plan funding is warranted for two positions. Based among the split of revenue hours among the counties GoTriangle proposes to fund the 2 positions as follows: Wake 1, Durham 0.66, Orange 0.34



**ORANGE COUNTY GOVERNMENT**  
Staff Work Group



Item                    4. a. iii  
Subject:                Name Change Transit Service Software  
Attachment:            Project Sheet

**PURPOSE:** Request to amend the FY26 Orange County Workplan to change to name from Trapeze to Transit Service Software.

**REQUEST SUMMARY:**

Orange County is evaluating the transit services software available for state contracts. This allocation is for capital expenses associated with transitioning from the current software to a new tool that will improve the efficiency of OCTS operations. This amendment clarifies the name and description of a project in Orange County's adopted FY26 Annual Workplan.

**ACTION:**

Approve to change to the name of the Transit Service Software.

REQUEST #

**FY 2026  
Orange Transit Work Plan  
Request Form  
Operating and/or Capital**

FY START DATE	
Jan	2026
Total Project Cost	
\$	200,000

Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Transit Services Software	Orange County Transportation Services	Jamael Wiley <a href="mailto:jwiley@orangecountync.gov">jwiley@orangecountync.gov</a>	Base Year	\$ -
			FY 2027	\$ -
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Orange Transit Estimated Capital Cost	
Jan-25		Software name change to Transit Services Software	Base Year	\$ 200,000
			Cumulative	\$ 200,000
Project Description/Scope	Enter below a summary of the project that may later be used as the project description in the FY 2026 Work Plan.			
Converting Ecolane to new software to improve data quality, service, and coordination with other transit providers in the County and region.				
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as fully as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification

1. Is this a New Project, Scope Change or Financial Change?      New     Scope     Financial

*See instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID     

2. Is this project Operating, Capital or Both?      Operating     Capital     Both

3. Is this a one-time request?      Yes       No

4. What is the timeframe for the request? Are you requesting a full year of funds in FY26 or a partial year to be annualized in future fiscal years?

One-time request to improve transit operations.
---

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Orange Transit Plan?

Orange County Transportation Services Administration building and County transit fleet.
---

6. Is this project programmed in the adopted Transit Plan FYs 2026-2032 Multi-Year Operating Program or CIP?    Yes       No

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Orange Transit Plan the request supports.

--

6b. If no, is this project in addition to projects and services included in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan or in lieu of projects and services included in those programs/plans?

--



**ORANGE COUNTY GOVERNMENT**  
Staff Work Group



Item

Subject: Name Change for the project contact

Attachment: Project Sheet(s)

**PURPOSE:** Request to amend the FY26 Orange County Workplan to change the project contacts.

**REQUEST SUMMARY:**

Orange County is requesting the project contact name change from Nishith Trivedi to Jameal Wiley and Sarah Williamson-Baker. This amendment clarifies the project's point of contact in Orange County's adopted FY26 Annual Workplan. The table below outlines the changes.

Request #	Project Name	Old Project Contact	New Project Contact
24OPTTS0 1	Hillsborough Circulator Operations	Nishith Trivedi	Jamael Wiley
19OPTTS2	Increase Cost of Existing Services (ICES)	Nishith Trivedi	Sarah Williamson-Baker
24OPTTS0 1	Continuation of Transit Services, Demand Response, and Paratransit	Nishith Trivedi	Jamael Wiley
19OPTTS1	Continuation of Transit Services Fixed Route	Nishith Trivedi	Jamael Wiley
20OPTTS0 6	Mobility on Demand	Nishith Trivedi	Jamael Wiley

**ACTION:**

Approve the change to the project contacts.

REQUEST #
19OPTTS2

**FY 2026  
Orange Transit Work Plan  
Request Form  
Operating and/or Capital**

FY START DATE	
Oct	2026
Total Project Cost	

Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Increase Cost of Existing Services (ICES)	Orange County Transportation Services	Sarah Williamson-Baker <a href="mailto:swilliamson-baker@orangecountync.gov">swilliamson-baker@orangecountync.gov</a>	Base Year	\$ -
			FY 2027	\$ -
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Orange Transit Estimated Capital Cost	
Nov-26			Base Year	
			Cumulative	
Project Description/Scope	Enter below a summary of the project that may later be used as the project description in the FY 2026 Work Plan.			
Request to change the project contact from Nishith Trivedi to Sarah Williamson-Baker				
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as fully as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification

Sarah Williams-Baker is the Deputy Transportation Director

1. Is this a New Project, Scope Change or Financial Change?      New     Scope     Financial

*See Instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID

2. Is this project Operating, Capital or Both?      Operating     Capital     Both

3. Is this a one-time request?      Yes       No

4. What is the timeframe for the request? Are you requesting a full year of funds in FY26 or a partial year to be annualized in future fiscal years?

One time request to change the name of the Project contact

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Orange Transit Plan?

6. Is this project programmed in the adopted Transit Plan FYs 2026-2032 Multi-Year Operating Program or CIP?    Yes       No

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Orange Transit Plan the request supports.

REQUEST #
24OPTTS01

**FY 2026**  
**Orange Transit Work Plan**  
**Request Form**  
**Operating and/or Capital**

FY START DATE	
Oct	2026
Total Project Cost	

Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Continuation of Transit Services Demand Response and Paratransit	Orange County Transportation Services	Jamael Wiley <a href="mailto:jwiley@orangecountync.gov">jwiley@orangecountync.gov</a>	Base Year	\$ -
			FY 2027	\$ -
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Orange Transit Estimated Capital Cost	
Nov-26			Base Year	
			Cumulative	
Project Description/Scope	Enter below a summary of the project that may later be used as the project description in the FY 2026 Work Plan.			
Request to change the project contact from Nishith Trivedi to Jamael Wiley.				
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as fully as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification

Jamael Wiley is the Transit Manager

1. Is this a New Project, Scope Change or Financial Change?      New     Scope     Financial

*See Instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID

2. Is this project Operating, Capital or Both?      Operating     Capital     Both

3. Is this a one-time request?      Yes     No

4. What is the timeframe for the request? Are you requesting a full year of funds in FY26 or a partial year to be annualized in future fiscal years?

One time request to change the name of the Project contact

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Orange Transit Plan?

6. Is this project programmed in the adopted Transit Plan FYs 2026-2032 Multi-Year Operating Program or CIP?    Yes     No

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Orange Transit Plan the request supports.

REQUEST #
20OPTTS04

**FY 2026**  
**Orange Transit Work Plan**  
**Request Form**  
**Operating and/or Capital**

FY START DATE	
Oct	2026
Total Project Cost	

Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Hillsborough Circulator 2.0	Orange County Transportation Services	Jamael Wiley <a href="mailto:jwiley@orangecountync.gov">jwiley@orangecountync.gov</a>	Base Year	
			FY 2027	
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Orange Transit Estimated Capital Cost	
Nov-26			Base Year	
			Cumulative	
Project Description/Scope	Enter below a summary of the project that may later be used as the project description in the FY 2026 Work Plan.			
Request to change the project contact from Nishith Trivedi to Jamael Wiley.				
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as fully as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification

Jamael Wiley is the Transit Manager

1. Is this a New Project, Scope Change or Financial Change?      New     Scope     Financial

*See Instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID

2. Is this project Operating, Capital or Both?      Operating     Capital     Both

3. Is this a one-time request?      Yes     No

4. What is the timeframe for the request? Are you requesting a full year of funds in FY26 or a partial year to be annualized in future fiscal years?

One time request to change the name of the Project contact

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Orange Transit Plan?

6. Is this project programmed in the adopted Transit Plan FYs 2026-2032 Multi-Year Operating Program or CIP?    Yes     No

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Orange Transit Plan the request supports.

REQUEST #
20OPTTS06

**FY 2026**  
**Orange Transit Work Plan**  
**Request Form**  
**Operating and/or Capital**

FY START DATE	
Oct	2026
Total Project Cost	

Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Mobility on Demand	Orange County Transportation Services	Jamael Wiley <a href="mailto:jwiley@orangecountync.gov">jwiley@orangecountync.gov</a>	Base Year	\$ -
			FY 2027	\$ -
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Orange Transit Estimated Capital Cost	
Nov-26			Base Year	
			Cumulative	
Project Description/Scope	Enter below a summary of the project that may later be used as the project description in the FY 2026 Work Plan.			
Request to change the project contact from Nishith Trivedi to Jamael Wiley.				
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as fully as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification

Jamael Wiley is the Transit Manager

1. Is this a New Project, Scope Change or Financial Change?      New     Scope     Financial

*See Instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID

2. Is this project Operating, Capital or Both?      Operating     Capital     Both

3. Is this a one-time request?      Yes     No

4. What is the timeframe for the request? Are you requesting a full year of funds in FY26 or a partial year to be annualized in future fiscal years?

One time request to change the name of the Project contact

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Orange Transit Plan?

6. Is this project programmed in the adopted Transit Plan FYs 2026-2032 Multi-Year Operating Program or CIP?    Yes     No

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Orange Transit Plan the request supports.

REQUEST #
19OPTTS1

**FY 2026  
Orange Transit Work Plan  
Request Form  
Operating and/or Capital**

FY START DATE	
Oct	2026
Total Project Cost	

Project Name	Requesting Agency	Project Contact	Orange Transit Estimated Operating Cost	
Continuation of Transit Services Fixed Route	Orange County Transportation Services	Jamael Wiley <a href="mailto:jwiley@orangecountync.gov">jwiley@orangecountync.gov</a>	Base Year	\$ -
			FY 2027	\$ -
			Cumulative	\$ -
Estimated Start Date	Estimated Completion	Notes	Orange Transit Estimated Capital Cost	
Nov-26			Base Year	
			Cumulative	
Project Description/Scope	Enter below a summary of the project that may later be used as the project description in the FY 2026 Work Plan.			
Request to change the project contact from Nishith Trivedi to Jamael Wiley.				
Project Justification / Business Case	Provide responses to <u>EACH</u> of the questions below. Answer the questions as fully as possible. Enter Not Applicable (N/A) as appropriate.			

Please detail project justification

Jamael Wiley is the Transit Manager

1. Is this a New Project, Scope Change or Financial Change? New  Scope  Financial

*See Instructions for definitions*

1a. If Scope Change or Financial Change - Indicate previous project ID

2. Is this project Operating, Capital or Both? Operating  Capital  Both

3. Is this a one-time request? Yes  No

4. What is the timeframe for the request? Are you requesting a full year of funds in FY26 or a partial year to be annualized in future fiscal years?

One time request to change the name of the Project contact

5. Where is this project located, who will this project serve and how will it improve service or overall implementation of the Orange Transit Plan?

6. Is this project programmed in the adopted Transit Plan FYs 2026-2032 Multi-Year Operating Program or CIP? Yes  No

6a. If yes, how does this request relate to what was envisioned in the adopted Multi-Year Operating Program, CIP, or Orange Transit Plan? Specify which component(s) of the Multi-Year Operating Program, CIP, or Orange Transit Plan the request supports.