



NORTH CAROLINA

Department of Transportation



Integrated Mobility Division Transit Systems Call

February 11, 2026

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AGENDA

- Opening/Announcement
- Finance Update
- Grant Administration Update
- Procurement Update
- Compliance Update
- Intercity Bus Update
- Training Update
- Calendar Update

Storm Response & Highlights



- Transit Response for the recent Winter Storm
- Onslow Innovative Efforts to serve citizens in need



Finance - Due Dates

December 2025 -January 2026	Budget Revisions due
January 15, 2026	Program Income quarterly report due
January 30, 2026	December monthly claims due 2 nd qtr. claims are due
February 28, 2026	January monthly claims due
March 30, 2026	February monthly claims due
April 15, 2026	Program Income quarterly report due
April 30, 2026	March monthly claims due 3rd qtr. claims are due
May 30, 2026	April monthly claims due
June 30, 2026	May claims due
June 2026	Final Budget Revision are due. Period of performance ends.
July 30, 2026	June monthly claims due 4th qtr. claims are due

Finance – Claims / Applications

As of today, we have **59 Claims** in submission status and **1 Change Request** that have been submitted for review.

The Board approved the **5311 admin and operating applications for FY27** on **February 5th**. Finance will begin working on those contract agreements in the near future so please be on the lookout for those. Please remember that your Authorized Official (AO) must sign the agreement, and the Witness for the AO's signature must be someone other than the AO him(her)self.

Finance – Reminders

- Please reach out to your Accounting Specialist for questions regarding claims, change requests, and G-codes.
- Please allow one (1) business day for the Accounting Specialist to respond to your email.
- All Claim Cover Letters must be addressed to Beth Gay, Interim Finance Manager.
- The date on the Claim Cover Letter and Claim Cover Sheet must match the claim date in EBS.
- Ensure the agency contact information on the claim documentation is correct for the reviewer.

Finance – Helpful Resources (CONNECT NCDOT)

**Connect NCDOT
BUSINESS PARTNER RESOURCES**

Doing Business Bidding & Letting Projects Resources Local Governments 

Prequalify Small Business Consultants Directory of Firms Trucking Fleet & Material Mgmt DMV **Public Trans** Purchasing ROW Turnpike

Financial
Forms, Manuals, Guidelines and Policy Documents

Connect NCDOT > Doing Business > Public Trans > Financial

Finance
Enterprise Business Services (EBS) Grants management system is designed to streamline and manage the entire grant lifecycle for NCDOT from grant application submission to award management, claims and change request submissions, approvals, financial tracking, reporting, and closeout.

Finance converts the approved applications to Agreements and the subrecipients submits claims in EBS workflow to draw down those funds. Claim submission requires several mandatory documents that must be included with each reimbursement claim to NCDOT. You can locate these documents along with the claim checklist under supplemental documents below.

Claim requirements:

1. Claim cover sheet
2. Claim cover letter on agency letterhead
3. DBE vendor payment form
4. Progress report
5. Supporting documentation to support expenses*

*Note: If a capital item or contracted service amount exceeds \$10K, then you must attach an executed 'Procurement Approval Letter' as part of the supporting documentation.

Vehicle Claim Requirements:

1. MVR-1 title application with NCDOT as the 1st lienholder
2. Final vendor invoice
3. Original order form
4. Copy of check or advance payment form
5. IMD Procurement Approval Letter
6. Lettering/logo invoice (if applicable)

News & Updates
August 12, 2025 -
IMD recently completed Subrecipient Training for Intelligent Document Processing (IDP). Below are a few resources from that training.

- [Subrecipient Training Slide Deck](#)
- [PDF Training Slide Deck](#)
- [Paid Stamp Transparent Image](#)
- [Training Recording](#)

Training Links

- [Claims Training](#)
- [Entering a DBE Payment Training](#)
- [Entering a Change Request Training](#)

Contacts
Kenetta Spence
Deputy Director of Finance and Grant Administration
Integrated Mobility Division
North Carolina Department of Transportation
(919) 707-4673 (Office)
kmspence1@ncdot.gov

Contact your assigned Regional Grant Specialist here:

[Regional Grant Administration Contacts](#)

Supplemental Documents

CHANGE REQUESTS
[Salary and Wage Detail Revision Form](#) 

CLAIMS
[ADVANCE- PAYMENT FORM](#) 
[Advance Payment Receipt](#) 
[Claim Cover Sheet](#) 
[DBE Vendor Payment Form](#) 
[Supporting Documentation Document](#) 

UPTAS

DOCUSIGN
[DocuSign Instructions](#) 

EBS ACCESS
[EBS Access](#) 
Must complete this form to gain EBS access

IDCR
[Certificate of Cost Allocation Form](#) 
Required if using IMD as the pass-through agency.

[de minimis rate](#) 
Use if an agency chooses to use the de minimis rate vs going through IMD or their cognizant agency.

[Example of IDCR](#) 


[IDCR Worksheet](#) 
Required if using IMD as the pass-through agency.

PROGRESS REPORTS

[5310 Reporting Form](#) 
[5311 Administration Reporting Form](#) 
[Capital Grant Reporting Form- 5310, 5311, 5339, 5339B](#) 
[Mobility Manager Reporting Form](#) 
[Operating Grant Reporting form 5311 RO 5311 Oper ARPA oper CONCPT](#) 
[PROGRESS REPORT- RS, Urban State Match, DG, AT, TA](#) 

Finance - Resources

- Reminder, all claims must follow the IDP format. More information can be found on the Finance webpage at
<https://connect.ncdot.gov/business/Transit/Pages/Transit-Financial.aspx>
- IMD Regional Contacts(link on the Finance webpage)
<https://connect.ncdot.gov/business/Transit/Pages/Regional-Support-Map.aspx>
- If you need assistance with your claims, please feel free to reach out to your accounting specialists.

Finance – Contacts

REGION	CONTACT NAME	OFFICE NUMBER	EMAIL ADDRESS
Interim Finance Manager	Beth Gay	919-707-4688	bmgay@ncdot.gov
Accountant	Jocelyn Valdez	919-707-4683	jpetatanvaldez@ncdot.gov
Eastern Piedmont	Tanisha O'Keefe	919-707-4689	ttokeefe@ncdot.gov
Western Piedmont	Ursala Banks	919-707-4671	uvbanks@ncdot.gov
Coastal Plains	Equila Drakeford	919-707-4680	ezdrakeford@ncdot.gov
Mountains	Monique Frasier	919-707-4681	msfrasier@ncdot.gov



Grant Administration Updates

News for FY 2027 UGA & other applications

Internship and Apprentice Applications

- Applications are currently under review.
- Materials will be presented to the Board of Transportation by March.

Section 5303 Applications

- The FY27 Section 5303 application package and allocation table were posted to IMD's UGA webpage on Nov. 20, 2025.
- MPOs were notified via email of the application availability and provided a link to download the materials from the UGA webpage.
- All documents must be submitted through SmartSheet.
- SmartSheet submission instructions were included in the notification email.
- Budgets were due in EBS by January 30.
- RGS feedback is expected soon.

Grant Application Review

- Regional Grant Specialists (RGSs) continue to review grant applications and have contact subrecipients if additional information, documentation, or corrections are required.
- ***Timely responses to these requests are critical.***
- Continued delays may result in ***delayed funding*** or applications being deemed ***ineligible for funding***.
- RGSs remain available to answer questions as they arise.





FY 27 Unified Grant Application (UGA) Process



Key Dates:

- The FY27 Unified Grants Application (UGA) cycle is April 1 – October 3, 2025
- *Approved* Section 5310 applications were presented at the January Board of Transportation meeting.
- *Approved* Section 5311 applications were presented at the February Board of Transportation meeting.
- The Contracting and Compliance Phase is July 1, 2025 – June 30, 2026

UGA Grant Application

From IMD's Connect Page

Unified Grant Application

Unified Grant Application (UGA)

Home ▶ Connect NCDOT ▶ Doing Business ▶ Public Trans ▶ Unified Grant Application

Unified Grant Application (UGA)

The Unified Grant Application (UGA) is designed to simplify, streamline, and modernize the process by which applicants apply for state-administered transit funds.

Please download the UGA Guidance. IMD opened the Call for Projects on April 1, 2025:

5303

[FY27 5303 Program*](#)

[FY26-27 Apprenticeship Program*](#)

[FY26-27 Internship Program*](#)

[FY26 ROAP Application](#)

[FY26 SMAP Application](#)

[FY27 Unified Grant Application \(UGA\)](#)

5303

News & Updates

November 20, 2025 -

The 5303 application is available to download and complete. The supporting documents are to be attached to the application in EBS. The deadline is **January 30, 2026** for the draft UPWP and EBS application.

October 31, 2025 -

The Internship and Apprenticeship applications are available to download and complete. The supporting documents are to be attached to the application in EBS and submitted by the due date of Monday, **December 1, 2025**.

**FY28 UGA
Coming April 2026**

***Note the UGA PDF works best when saved to your computer and opened in a PDF reader.**

Supplemental documents and guidance are provided under the tabs below. Additional calls for projects including SMAP, ROAP and 5303, can be found as links under the Timeline.

UGA Grant Application

Supplemental Documents

From IMD's Connect Page

Supplemental Documents

At a recent roundtable, some noted that the supplemental documents can be difficult to find. Here is the direct link/URL -

Supplemental Documents

[Training Webinars and Presentations](#)

Supplemental Documents, Program Documents and Checklists

Below are individual links for the supplemental documents.

- **Master Documents** are required for all rural grants, and Traveler's Aid and ConCPT grants for Direct Recipients
- Individual grant programs such as 5311 Admin/Operating, Combined Capital, 5310 programs among others.
 - 5311 Admin/Oper ([Refer to 5311 Admin/Operating tab on UGA Checklist](#))
 - Combined Capital ([5311 & 5339](#))
 - Capital Cost of Contracting ([5311](#))
 - 5310 Operating
 - 5310 Capital Purchase of Service
 - 5310 Mobility Manager
 - Rural State Operating
 - ConCPT-CO ([Coordination](#))
 - ConCPT-CN ([Consolidation](#))
 - Traveler's Aid
 - NON-STI Rural Expansion Vehicle
 - Rural STI
 - Urban State Match ([Direct Recipient](#))
 - Urban Advanced Technology ([Direct Recipient](#))
 - Urban STI ([Direct Recipient](#))
 - [5303 Planning \(MPO\)](#) - Will open Fall 2025
- Checklists for rural sub-recipients and Direct Recipients
 - [FY27 UGA Checklist Rural Recipients](#)
 - [FY27 UGA Checklist Direct Recipients](#)
- Tracking sheet for application progress (optional, does not need to be submitted to IMD)
 - [FY27 NCDOT IMD UGA Progress Sheet](#)

<https://connect.ncdot.gov/business/Transit/Pages/Unified-Grant-Application.aspx>



Fiscal Year 2028 Unified Grant Application (UGA) Process

April 1, 2026 – October 2, 2026

The IMD internal UGA planning team has conducted a comprehensive review of the UGA to streamline the program and improve clarity and usability for applicants.

- External stakeholders participated in multiple review sessions, providing feedback, comments, and recommendations for improvement.
- The FY28 UGA beta test was conducted on January 29, and the team has reviewed all resulting comments and suggestions.

Cover Star (to be determined): IMD received several strong photo submissions in response to the request; however, a final cover image has not yet been selected. Additional photos are welcome and may be sent to Casondra Hamilton at clhamilton@ncdot.gov. Images should highlight movement, riders, staff, and showcase colorful, caring, and engaging aspects of your system.



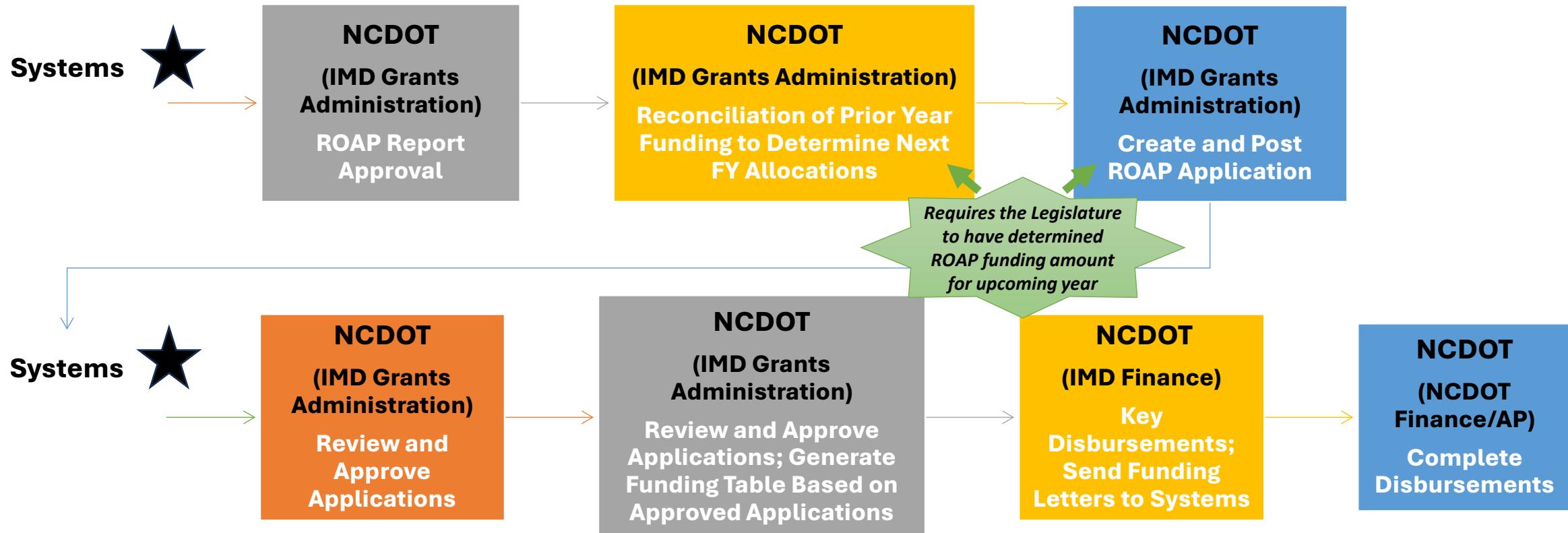
There will be **comprehensive UGA trainings** held the week of **March 23rd** and **March 30th**.

New this Year: There will be a condensed version of the UGA training, focusing on changes for 2028, available for experienced Directors the week of March 23rd.

ROAP Updates

REMINDER: We continue to streamline processes to get ROAP Allocations out earlier in 2026.

HOW CAN YOU HELP: Submitting ROAP reports or making any/all necessary corrections to previously submitted reports, will allow for faster submission of your final report. This will allow IMD staff to begin approving reports and reconciling FY26 funds sooner. This is an important early steps towards faster disbursements.



ROAP

Monthly Overview

Overall Stats				
Primary	Description	Amount	% Total Allocation	
ROAP Allocation	1. Funds approved from	\$ 18,716,632		
Carryover	2. Unspent funds from previous	\$ 1,449,625		
Allocation + Carryover	3. Total of 1 + 2	\$ 20,166,257		
Transferred Out	4. Transferring ROAP funds to match	\$ 671,762	4%	
YTD Expenditures	5. Total approved expenses to	\$ 12,670,597	63%	
Total Balance	6. Remaining funds to date	\$ 7,495,660	33%	
Other Funds Used	7. Other Funds Used that exceeds	\$ 2,922,733		

ROAP (EDTAP, EMPL, RGP) Stats				
SFY2026	Net Allocations	Expenditures	% Expended	County Funds Used
EDTAP (Elderly & Disabled Transportation Assistance Program)	\$ 9,399,625	\$ 5,463,351	58%	\$ 855,717
EMPL (Employment Assistance Program)	\$ 2,319,567	\$ 1,602,979	69%	\$ 731,334
RGP (Rural General Public Program)	\$ 8,447,065	\$ 5,604,267	66%	\$ 839,447
Totals	\$ 20,166,257	\$ 12,670,597	63%	\$ 2,426,498

% Transit Systems Reported by Month	
July 2025	97%
August 2025	98%
September 2025	96%
October 2025	89%
November 2025	84%
December 2025	84%
January 2026	0%
February 2026	0%
March 2026	0%
April 2026	0%
May 2026	0%
June 2026	0%

ROAP Reporting

“I’m dreaming of a monthly ROAP report...”

They’re due on the 30th of the month.



ROAP reports are collected monthly.

Systems should have –

- Link to FY26 ROAP report link
- Link to ROAP Monthly Reporting/ Program Balance Sheets

ROAP reports are due 30 days after the end of each reporting month.

- *Example:* The July report is due August 30.

The January report is due Friday, February 27th.

Transfers of ROAP funds must be reported in the month the transfer occurs—not in a later month.

FY26 ROAP report confirmations or corrections are due within **4 days** of receiving the ROAP Report email (after RGS approval).

- Your FY26 confirmation serves as your approval that all information is accurate and final.



Procurement

Statewide Vehicle Invitation For Bid (IFB)

- Traditional Vehicle Statewide Contract
 - NCDOT-Purchasing has completed review and sent comments back
 - We have completed our responses and sent them back
 - Once that is completed, it will go to the Legal Division and then for Final Approval
 - We expect to post the IFB most likely the week of Feb 16-20.
- Heavy-Duty/Large Bus Statewide Contract
 - Workshop on 01/29 was very helpful
 - Survey closed yesterday (02/10) with 15 submissions – Thank you!
 - The IFB Creation is in progress

Agency Procurement Template Update

- Email sent out Tuesday and includes the template (also on webpage)
- Due to multiple changes to regulations, every agency needs to update this as soon as they can to be in compliance. We are giving agency 6 months to update.
- Changes include:
 - Update to Thresholds
 - Removal of DBE language
 - Updating of language to current circular language
 - Ensured longevity by making circular references 'as amended' rather than the specific version



Compliance Reviews Update

Compliance Reviews

38 – Reviews Conducted
(31 – Transit & 7 – 5310s)

8 – Reviews Closed

30 – Reviews in Follow-Up Process

DAMIS Reporting

RLS is currently collecting Drug and Alcohol data from 2025 (DAMIS).

All information is due by February 13, 2026 (Friday)

NCDOT Intercity Bus – Website Update Request

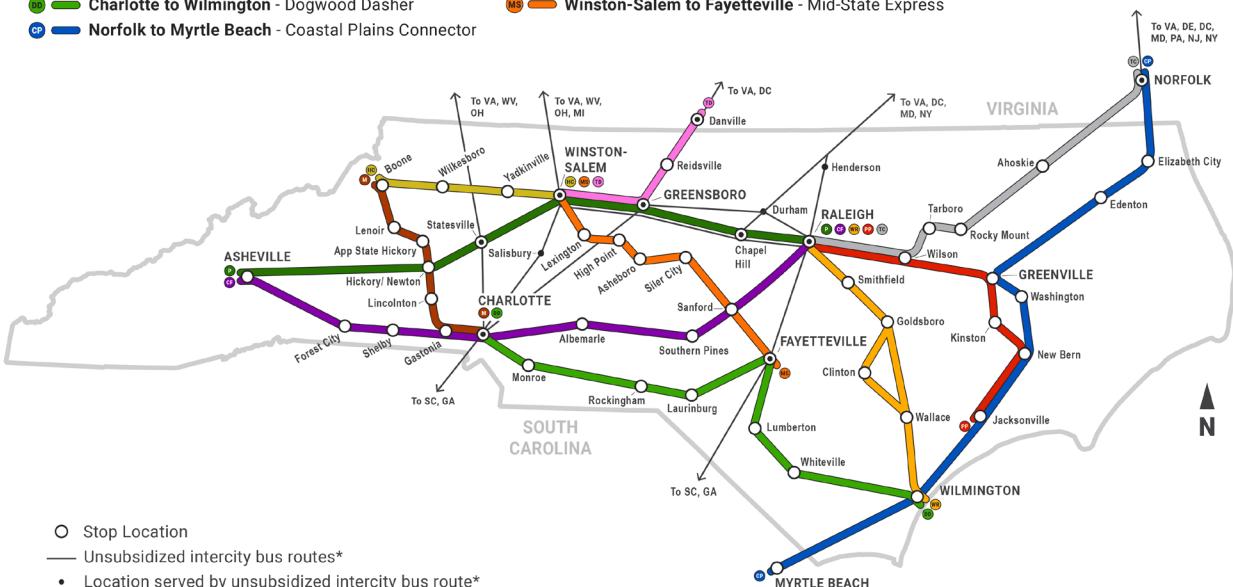
- We are in the process of reaching out to all transit service providers via email with a request to include mention of NCDOT's state-supported intercity bus network on your website if intercity bus service is provided within your service area.
- Outreach efforts will span into next month.
- You'll be hearing from Cambell Pfister or Logan Bealke.
- We appreciate your help in making sure individuals know this transportation option is available to them.
- With over 50 bus stops we help to support connections between rural and urban places throughout the state.

NCDOT Intercity Bus Routes:
<https://ncdot.gov/intercitybus>

Intercity Bus Service in North Carolina

ROUTES SUBSIDIZED AND MANAGED BY NCDOT

- P Asheville to Raleigh via Hickory - Piedmont Pass
- cf Asheville to Raleigh - Cardinal Flyer
- M Boone to Charlotte - Mountaineer
- HC Boone to Greensboro - High Country Gateway
- CD Charlotte to Wilmington - Dogwood Dasher
- CP Norfolk to Myrtle Beach - Coastal Plains Connector
- TC Norfolk to Raleigh - Tidewater Connector
- PP Raleigh to Greenville to Jacksonville - Pirate's Passage
- WP Raleigh to Wilmington - Wave Rider
- TD Winston-Salem to Danville - Triad-Danville Connector
- MS Winston-Salem to Fayetteville - Mid-State Express



*The unsubsidized intercity bus routes are shown for general informational purposes only. NCDOT is not involved in the management or operation of these routes which are subject to change at any time by the independent service providers.

Updated 1/22/2026



NCDOT Intercity Bus Program FY27 Call for Applications to Operate Services

- Intercity bus services are defined as fixed-route, regularly scheduled services that provide intercity transportation within the state and connections to the national intercity bus system through interline agreements or through-service arrangements.
- NCDOT currently operates 11 daily routes and does a call for applications to operate service each year.

Funding: A combination of federal Section 5311(f), state, and local funds available specifically for supporting intercity bus service to provide assistance in operating intercity routes. Funds are used to support up to 100 percent of the “net operating deficit.”

Eligible Applicants: transit agencies, non-profit carriers, for-profit carriers, and tribal governments may apply to operate these routes.

Application information:

<https://connect.ncdot.gov/business/Transit/Pages/Intercity-Bus.aspx>

- **Opened:** February 6, 2026
- **Closes:** March 20, 2026

For questions contact:

Hart Evans, jhevans1@ncdot.gov

Training Updates



NCDOT-IMD Strategic Training Program

2025 Training Review

- **41 Training Programs Delivered (Virtual and In-Person)**
- **22 Different Topics**
- **1 Boot Camp**
- **4 Transit Academy 101 Modules**
- **852 Attendees Trained**



NCDOT-IMD STP Training Opportunities

February 2026

- **FM Series Class #1**
- **Financial Management Best Practices & Using ROAP Funds**
 - **February 26, 2026**
 - **2:00 pm – 4:00 pm**
 - <https://attendee.gotowebinar.com/register/520991865317004041>
 - This 2-hour session will discuss Best Practices in the basics of financial management of a transit system, exploring potential new funding sources, and budget planning of ROAP Funds. Topics include budget development & financial planning, the importance of diversifying funding sources and avoiding overspending budget funds. Bring your questions about your funding sources and how to maximize them in your budget planning.

NCDOT-IMD Strategic Training Opportunities

March 2026

- **Drug & Alcohol Program Management (DAPM) - Virtual**
 - 03/03/26 - 03/05/26
 - 9:00 am – 12:00 pm (**Same time every day**)
 - [DAPM Registration Link](#)
 - Description: <https://connect.ncdot.gov/business/Transit/Pages/Transit-Communication-Hub.aspx>
 - **YOU MUST ATTEND ALL THREE CLASSES TO RECEIVE A CERTIFICATE**
- **Drug & Alcohol Program Management (DAPM) - Virtual**
 - 03/06/26
 - 9:00 am – 12:00 pm
 - [DAPM Reasonable Suspicion Determination Training](#)
 - Description: <https://connect.ncdot.gov/business/Transit/Pages/Transit-Communication-Hub.aspx>
 - **YOU MUST ATTEND THE ENTIRE CLASS AND PASS A QUIZ TO RECEIVE A CERTIFICATE**

NCDOT-IMD Strategic Training Opportunities

March 2026

- **2026 Boot Camp – In-Person Training**
 - **March 17-18, 2026**
 - NC State University – ITRE
 - [2026 Boot Camp Registration Link](#)
 - Attendees will gain insight into doing business with IMD as a sub-recipient of federal funds, will learn about IMD's structure, and will be given an overview of various programs IMD supports. Learn the areas of guidance IMD can provide and key requirements to achieve and maintain compliance with Federal and State requirements. An in-depth review of the Unified Grant Application process and applying for grants will be provided. A list of resources and helpful tools will be distributed to attendees. Several of IMD's Key staff will be available to discuss their roles at IMD, the division they work in, and how that division works with NC public transit systems.

NCDOT-IMD Strategic Training Opportunities

March 2026

- **2026 Financial Management Series Class #2**
- Using the CCAM Website and Understanding Federal Fund Braiding
 - **March 10, 2026**
 - **10:00 am – 12:00 pm**
- In May 2025, the CCAM updated the CCAM Program Inventory, which identifies 132 federal programs that may provide funding for human services transportation for individuals with disabilities, older adults, and individuals of low income. The updated program inventory includes detailed program information, such as Assistance Listing Numbers (formerly Catalog of Federal Domestic Assistance (CFDA)), statutory references, types of recipients and beneficiaries, and eligible transportation activities. Alongside the Program Inventory, CCAM developed the Federal Fund Braiding Guide, which defines federal fund braiding for local match and provides guidance to potential grantees and CCAM agency program managers on acceptable arrangements for transportation-related projects.

NCDOT-IMD Strategic Training Program

Future Training Opportunities

- In-Person
 - Emergency Training – (May-June)
 - Transit Academy 101
 - Winston-Salem (Not Confirmed)
 - May – October except July (1 ½ days each month)
 - PASS Train the Trainer (May-June)
 - PAT Training (September)
 - Drug & Alcohol – DAPM & RS – (September-October)

Transportation Leadership Development Program (TLDP)

There are 3 seats still open for the Spring 2026 semester of TLDP.

Please register yourself or someone in your organization so they can grow their leadership skills.

The TLDP registration [process is online](#).

This is an excellent opportunity to invest in your future and your organization's future.

For more information, visit the [TLDP website](#) or Contact Jeremy Scott if you have any questions: 919-515-8624 jscott@ncsu.edu

Start Date (course work received and begins) February 16, 2026

Seminar 1 Dates: March 11-13, 2026

Seminar 2 Dates: April 15-17, 2026

End Date May 22, 2026

Seminar Location:

NCSU University Club, State Room
4200 Hillsborough St, Raleigh, NC 27606
(919) 828-0308

Attendance at the seminars is required; dress is casual.

Meals during the three seminar days are included in your registration fees.

The daily schedule for both seminars is as follows:

- Day 1 - 9:00 AM - 9:00 PM
- Day 2 - 8:30 AM - 9:00 PM
- Day 3 - 8:30 AM - 2:00 PM

Calendar & Resource Updates



Transit Communication Hub

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
February 8	9	10	11 [[Transit System]]	12	13 DAMIS Report	14
15	16	17	18	19	20	21
22	23	24	25 [[NCPTA Execut]]	26 [[Maximizing You]]	27 Monthly Claim: January Month	28
March 1	2	3	4 DAPM (VIRTUAL)	5 [[2026 Board of Transportation]]	6 REASONABLE	7
8	9	10	11 [[Transit System]]	12 TLDP	13	14

Important Dates – Next 30 Days

Reporting Due:

- DAMIS – 02/13
- Monthly Claims – 02/27
- January ROAP – 02/27

Meetings:

- Next Transit Call is on 03/11

Training:

- Financial Series – Maximizing Your Funding Options – 02/26
- DAPM – 03/03 through 03/05
- Reasonable Suspicion – 03/06
- TLDP – 03/11 through 03/13
- New Director's Boot Camp – 03/17 & 03/18

If you would like to add this calendar to your own Outlook, iCal, etc., copy and paste this URL to subscribe from your calendar: <webcal://publish.smartsheet.com/2abc0d6e1a874cb8ab9d1cd4585d6635.ics>