NORTH CAROLINA
Department of Transportation

Integrated Mobility Division
Transit Systems Call

May 14, 2025

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AGENDA

- Opening/Announcements
- Finance Updates
- Grant Administration Updates
- Procurement Updates
- Compliance Updates
- Training Updates
- Calendar Updates

Grants Admin and Finance Updates

- IMD Personnel Update
- FY 27 5311 Admin/Oper Allocations
- New collaboration meetings with Regional Grant Specialist and Accounting Specialist by region

Finance Updates

Finance Updates

- We have approximately 47 more days remaining in this fiscal year. All projects with a period of performance end date of June 30, 2025, will need to have final claims submitted in EBS on or before **July 30, 2025.**

- IMD will no longer accept claims on these projects after **July 30, 2025**, unless the project has received a signed approved period of performance extension by Beth Gay prior to **June 30, 2025.** Projects without an approved period of performance extension will be closed.

- Please select the final indicator for all final claims.

Finance Updates

- IMD has issued a blanket period of performance extension on all active vehicle projects. If you did not receive a copy of the approved period of performance extension, please reach out to your accounting specialist.
- If we failed to include one of your vehicle projects, please reach out to us immediately.
- This extension did not include any projects that were approved for other capital items; therefore, these must be requested in a separate application.

Finance Updates

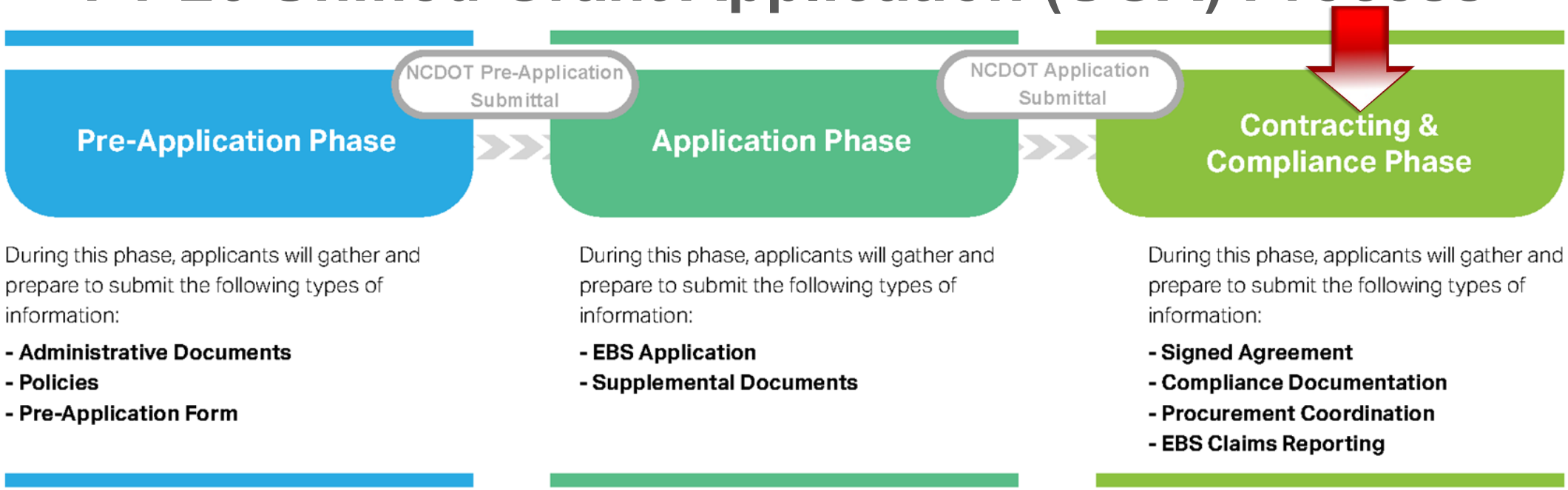
- A change request must be submitted in EBS to balance all budgets with line items in overdraft. This must be completed prior to submitting the last claim.

- If you have started a claim, and need to submit a change request, you must contact EBSSupport@ncdot.gov to have them delete the claim in order to submit the change request

- If you need any assistance, please reach out to your accounting specialists

Grant Administration Updates

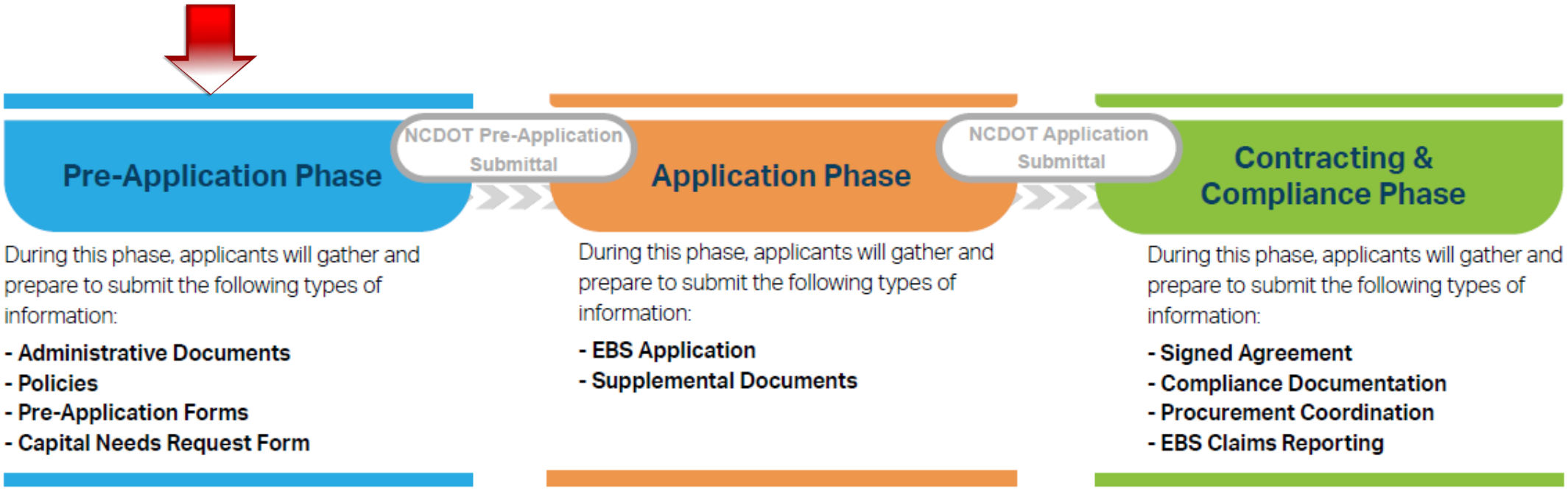
FY 26 Unified Grant Application (UGA) Process



Key Dates:

- The Finance section is working on agreements for FY26 funding
- The Contracting and Compliance Phase begins with the new fiscal year in July

FY 27 Unified Grant Application (UGA) Process



Key Dates:

- The FY27 Unified Grants Application (UGA) cycle is April 1 – October 3, 2025
- The Pre-Application Phase is April 1 – June 3
- The Application Phase is July 1 – October 3
- The Contracting and Compliance Phase is July 1, 2025 – June 30, 2026

UGA Grant Application Page from IMD's Connect Page

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:

FY27 Unified Grant Application (UGA)

***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.

Please contact your assigned Regional Grant Specialist for further assistance.

IMD has prepared an **FY27 Unified Grant Application (UGA) Overview** handout as a job-aid to guide subrecipients through the phased approach of the FY26 UGA. Each phase lists the details and steps which will occur as the application moves through the process.

The following documents are job aids and information to assist with the UGA. The **UGA Roadmap** is your guide to getting started, illustrating the relationship between each document.

- **FY27 UGA Pre-Application (Phase 1) Quick Reference Guide**
- **FY27 UGA Application (Phase 2) Quick Reference Guide**
- **FY27 UGA Application Contracting & Compliance (Phase 3) Quick Reference Guide**
- **Smartsheet Quick Reference Guide**

News & Updates

April 1, 2025 -

IMD has published the **FY27 Unified Grant Application** and opened the Call for Projects.

Smartsheet Quick Reference Guide - IMD has gathered tips and tricks to best utilize Smartsheet and prepared this reference guide. This guide includes how to complete Smartsheet forms and grids which are used throughout the entire UGA process.

UGA Progress Sheet - This progress sheet serves as a tracking sheet for the application process. This progress sheet does not need to be submitted to IMD.

UGA Roadmap - This document provides a quick snapshot of the UGA tools and resources. This roadmap is especially helpful for those who are new to the UGA process.

News for FY 2027 UGA April 1 – October 3, 2025

- Regional Grant Specialists are available to answer questions as you proceed through the application process.

- **IMPORTANT Reminder:** The date for requesting vehicle mileage will be changed to May 31st to ensure enough time for ITRE to collect information and work with our EBS support team to enter the eligible replacement vehicles before the Capital application is scheduled to open in early July.

ROAP Overview – May 12, 2025

Overall ROAP Stats

Primary	Description	Amount	% Total Allocation
ROAP Allocation	1. Funds approved from legislators	$18,664,423	
Carryover	2. Unspent funds from previous year	$2,435,924	
Allocation + Carryover	3. Total of 1 + 2	$21,100,347	
Transferred Out	4. Transferring ROAP funds to match eligible grant programs	$832,387	4%
YTD Expenditures	5. Total approved expenses to date	$14,980,926	80%
Total Balance	6. Remaining funds to date	$5,287,034	25%
County Funds Used	7. County Funds Used that exceeds the transit systems' allocations	$5,227,401	

EDTAP, EMPL, RGP Stats

SFY2025	Net Allocation	Expenditures	% Expended	County Funds Used
EDTAP (Elderly & Disabled Transportation Assistance Program)	$9,772,042	$8,543,239	87%	$1,253,147
EMPL (Employment Assistance Program)	$2,193,044	$3,055,775	139%	$1,534,191
RGP (Rural General Public Program)	$8,302,873	$8,609,313	104%	$2,440,063
Totals	**$20,267,959**	**$20,208,326**	**100%**	**$5,227,401**

% Transit Systems Reported by Month

July 2024	**99%**
August 2024	**99%**
September 2024	**97%**
October 2024	**98%**
November 2024	**98%**
December 2024	**99%**
January 2025	**97%**
February 2025	**96%**
March 2025	**74%**
April 2025	**9%**
May 2025	**0%**
June 2025	**0%**

ROAP Reporting Process

Sally says "don't sleep on your ROAP reports". They are due on the 30th of each month

ROAP reporting timeline:

- ROAP reports are due 30 days after the end of the reporting month (i.e., July report is due August 30th)
- March's report was due April 30, 2025
- April's report is due May 30, 2025
- Any outstanding report confirmations and/or corrections are due within 4 days of receiving the ROAP Report e-mail
- When program balances reach beyond allocated amounts continue to submit reports and expenses will record in the "County Funds Used" column ~ IMD is looking into renaming this column to "Other Funds Used" to cover payments other than County funds.

ROAP Update (Continued)

FY25 ROAP Report SmartSheet Link:

https://app.smartsheet.com/b/form/5cd8951fef8845a699ec23382a249331

- SmartSheet system will send automated emails once the RGS has reviewed and approved the monthly report. Transit directors are asked to acknowledge accuracy of information by following the instructions in the automated email within five (5) business days.
- If an error is discovered one (1) report correction per monthly report is allowed. This change was effective with the December 2024 report.

NCPTA – IMD ROAP Disbursement Discussions

During the past few months, the NCPTA advisory board and IMD have discussed the ROAP program terminology, timing and 2nd allocation and disbursement plan of the previous year's unspent ROAP funds.

ROAP Fund Allocation

ROAP Allocation Terminology:

- **Base Allocation disbursement** of funds are funds appropriated by legislature. Each county's amount is determined by the ROAP funding formulas in each program.

- **Unspent Funds disbursement** of funds is determined by amount of unspent funds after the ROAP program is reconciled at end of fiscal year. The ROAP formula is applied to the unspent funds in each program to determine how much additional funding each eligible county will receive. This disbursement will be made to systems meeting eligibility criteria (i.e., 5% or less unspent funds)

ROAP Funding Allocation Formulas

1st disbursement is equal to amount in allocation table – **minus unspent funds**

Elderly and Disabled Transportation Assistance Program (EDTAP)

- ✓ *50% divided equally among all counties;*
- ✓ *22 ½ % based on the number of senior residents per county as a percentage of the state's total senior population;*
- ✓ *22 ½ % based on the number of disabled residents per county as a percentage of the state's total disabled population; and*
- ✓ *5% based on a population density factor that recognizes the higher transportation costs in rural, sparsely populated counties*

Employment and Transportation Assistance Program (EMPL)

- ✓ 10% divided equally among all counties;
- ✓ 45% based on the population of each county as a percentage of the total state population; and,
- ✓ 45% based on the number of unemployed individuals in the labor force as a percentage of the number of unemployed individuals in the labor force in the state, in January, prior to application distribution

Rural General Public Program (RGP)

- ✓ 50% divided equally among all eligible counties; and,
- ✓ 50% based upon the rural population of each county as a percentage of the total state rural population.
- ✓ Excludes the population of the urbanized area as defined by the 2020 Census (See Appendix B for the 2020 Census urban and rural population data)

Estimated FY26 ROAP Program Timeline

- Legislature approves budget amount for FY26 ROAP ~ estimated July – August
- FY25 ROAP program balanced – begin mid-August after June ROAP reports submitted and approved
- ROAP allocation table and application created and announced ~ early September
- Signed application due to IMD within 30 days
- IMD reviews and approves applications and prepares requests for disbursement
- Late October – early November (10-27 to 11-07) estimated date for Base Allocation disbursement
- Mid-November (11-17 to 11-21) 2nd disbursement – unspent funds to eligible systems

Example Calculation of Initial Allocation – Unspent Funds = Adjusted Disbursement

Initial Formula Allocation				Unspent Funds at End of Fiscal Year				Total Initial Allocation - Unspent Funds				Disbursement of Initial Allocation - Unspent Funds Balance			
EDTAP	EMPL	RGP	Initial Allocation	EDTAP	EMPL	RGP	Total Unspent	EDTAP	EMPL	RGP	Adjusted First Allocation	EDTAP	EMPL	RGP	First Disbursement
$ 107,843	$ 29,703	$ 101,250	$ 238,796	$ 56,071	$ 26,727	$ 72,473	$ 155,271	$ 51,772	$ 2,976	$ 28,777	$ 83,525	$ 51,772	$ 2,976	$28,777	$ 83,525

Process:

Step 1: ROAP program is reconciled at end of fiscal year

Step 2: New fiscal year allocation table is created with appropriated amount from legislature

Step 3: Unspent funds (if any) are deducted from individual county allocation. Unspent funds remain with county for use in next fiscal year

Step 4: Disbursement amount is adjusted to reflect unspent funds.

Step 5: Unspent funds + disbursement amount = full allocation amount per the ROAP allocation table

Step 6: Pool of unspent funds are recalculated with the ROAP formulas and disbursed to counties meeting eligibility criteria

ROAP Unspent Fund Allocation Example

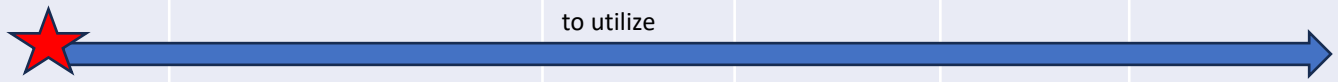
- Example of how a disbursement of unspent funds could look like using the formula disbursement for eligible systems (no unspent funds or within certain percentage i.e., 5% or less)
- Unspent funds percentage will be taken from previous years' final spent amount recorded in SmartSheet database

FY23 Unspent funding Breakdown by Program and Total (unspent funds shared proportionally based on ROAP formula)				
System	**EDTAP**	**EMPL**	**RGP**	**Total**
ABC	$35,462	$11,758	$23,374	$70,594
123	$17,067	$2,029	$16,794	$35,890
XYZ* (not eligible for additional funds)	0	0	0	0

Procurement

Procurement Project Status Report

Project	Dec 2024	Jan 2025	Feb 2025	Mar 2025	Apr 2025	May 2025	June 2025	July 2025
ProcurementPro					NRTAP On Transit Call to announce training	Training	Training Pilots can start	ProcurementPRO Active
Statewide Routing Software – Tech RFP	Contracting Stage		*Contract Active	*Training and Education on	what is avail-able and how to utilize			
Propane Conversion Kits (NCDOA)	RFP Closed (12/06)	*Tentative Approved Contracts		*New Contract Active 3/1/25				
Statewide Camera Contract	Agency Workgroup (12/04)		Working with NCDIT on putting RFI together			*Tentative RFI		
Statewide Vehicle Contract (2026-2028)	Agency Workgroup (11/20) Vendor Workgroup (11/19)	Specs and Comments Summarized	IMD Meeting with Purchasing to discuss issues	Working with Purchasing to create RFP				



Procurement

Vehicle Ordering

- Please move forward with your procurements of FY25 vehicles ASAP if you have not done so already

Implementation of ProcurementPRO

- Starting with FY26-funded projects, all procurements over the current micro purchase threshold (> $10,000) must go through the ProcurementPRO tool to generate a procurement file for NCDOT-IMD approval
- Exceptions include:
  - Procurements completed utilizing an existing statewide contract (e.g. current minivan contract STC 2510A, radio contract 725G etc…); systems will still need to submit previously required documentation such as Procurement Checklist and Procurement History Form for approval prior to submission of claim
  - Rolling stock procurements using NCDOT-IMD generated order forms; normal process will continue
- A recorded general ProcurementPRO training was completed on 5/7/25 and will be posted to the IMD Procurement page soon
- A system specific (all those invited are projected to complete a procurement over $10,000 in FY26) ProcurementPRO training will take place on 6/18/25
- Please reach out to Chris Dodson (cbdodson@ncdot.gov; 919-707-4696) with any questions or concerns

Compliance Updates

2024 Compliance Reviews

CY24 5311

- 30 Reviews Conducted
- 20 Closed
- 10 In-Process

Calendar Year 2024

Alamance County Transportation Authority (ACTA) - **Completed**	Albemarle Regional Health Services (ICPTA)- **Completed**	Alleghany County - **Completed**
Ashe County Transportation Authority - **In Process**	Avery Co. (ACT) - **Completed**	Bladen County (BARTS) - **In Process**
Buncombe County/Mountain Mobility - **Completed**	Clay County - **Completed**	Gaston County - **In Process**
Goldsboro-Wayne County (GWTA)- **Completed**	GoWake Access - **In Process**	Guilford County Transportation and Mobility Services (TAMS)- **Completed**
Hoke Area Transit Service (H.A.T.S.)- **Completed**	Johnston County Area Transit (JCATS)- **Completed**	Kerr Area (KARTS)- **Completed**
Lee County (COLTS) - **Completed**	McDowell County Transportation - **In Process**	Mountain Projects Inc. Haywood Co. - **Completed**
Pender Adult Services Inc.(PAS)- **Completed**	Polk County - **In Process**	Rockingham (ADTS)- **Completed**
Rowan Transit System (RTS) - **Completed**	Rutherford County Transit - **In Process**	Sampson County - **Completed**
Scotland County (SCATS) - **In Process**	Tar River Transit / City of Rocky Mount - **Completed**	Union County Transportation - **Completed**
Western Carolina Community Action, Inc. (WCCA-Apple Country (Henderson County) - **In Process**	Western Piedmont Regional Transit Authority - **Completed**	Wilkes Transportation Authority (WTA) - **In Process**

2025 Compliance Reviews

Calendar Year 2025

Anson County Council on Aging	Anson County Transportation System	Beaufort County Developmental Center, Inc.
Brunswick Transit System, Inc.	Cabarrus County Transportation Services (CCTS)	Carteret County
Chatham Transit Network	Cherokee County	Cleveland County (Transportation Administration of Cleveland County, Inc.)
Columbus County	County of Davidson, Senior Services	Craven County (CARTS)
Dare County	Davidson County Transportation System (DCTS)	Gates County
Graham County	Graham County-Senior Center	Hyde County / Tyrrell County
Lenoir County	Lincoln County	Lincoln County Senior Services
Iredell County (ICATS)	Iredell County Council on Aging	Jackson County
Macon County	Madison County Transportation Authority	Martin County
MONARCH - Columbus County	MONARCH - Moore County	MONARCH - Robeson County
MONARCH - Stanly County	Moore County	Person County (PATS)
Richmond Interagency Transportation, Inc.	Robeson County (SEATS)	Stanly County (SCUSA)
Stanly County Senior Services	Swain County Focal Point on Aging Inc.	The Life Center
The Workshop of Davidson	Washington County (Riverlight Transit)	Wilson County
Wilson, City of	Yadkin Valley Econ Dev Dist (YVEDDI)	

Training Updates

NCDOT-IMD Strategic Training Program
Disability Awareness-Customer Service Training

- Certificates will be emailed no later than Friday, May 16
- If more than one person attended the training, each person should have taken the quiz and entered their name as the person taking the quiz.
- If someone does not receive their certificate, email me. I can tell you if they were not registered or did not pass the quiz.

NCDOT-IMD Strategic Training Program
2025 Transit Academy 101 (TA101)

- ONLY 1 SEAT LEFT!
- Cohort 2 Begins Next Week!
- Module 1 – May 20-21
  - Introduction to Transit Administration
- Classes will be held in Winston-Salem, NC

NCDOT-IMD Strategic Training Program
June Succession Planning Training Programs

- What is Succession Planning
- Sowing the Seeds for Long-Term Success
- Making the Case for Internal and External Succession Planning
- Key Characteristics of Successful Succession Plans
- Different Needs and How to Plan
- Developing the Succession Plan
- Reviewing and Reconfirming Your Organization Plan
- Overcoming Obstacles to Succession Planning
- Talent and Bench Strength Assessment
- Defining Your Agency's Key Elements of a Successor

NCDOT-IMD Strategic Training Program
June Succession Planning Training Programs

- Identifying Critical Key Positions
- Identifying Competency Requirements and Gaps
- Developing a Plan of Action
- Developing and Retaining Your Talent
- Coaching and Professional Development
- Capture and Transfer Knowledge
- Measure, Monitor and Evaluate
- Aiming for a Smooth Transition
- Keeping Your Succession Plan Alive

NCDOT-IMD Strategic Training Program
June Succession Planning Training Programs

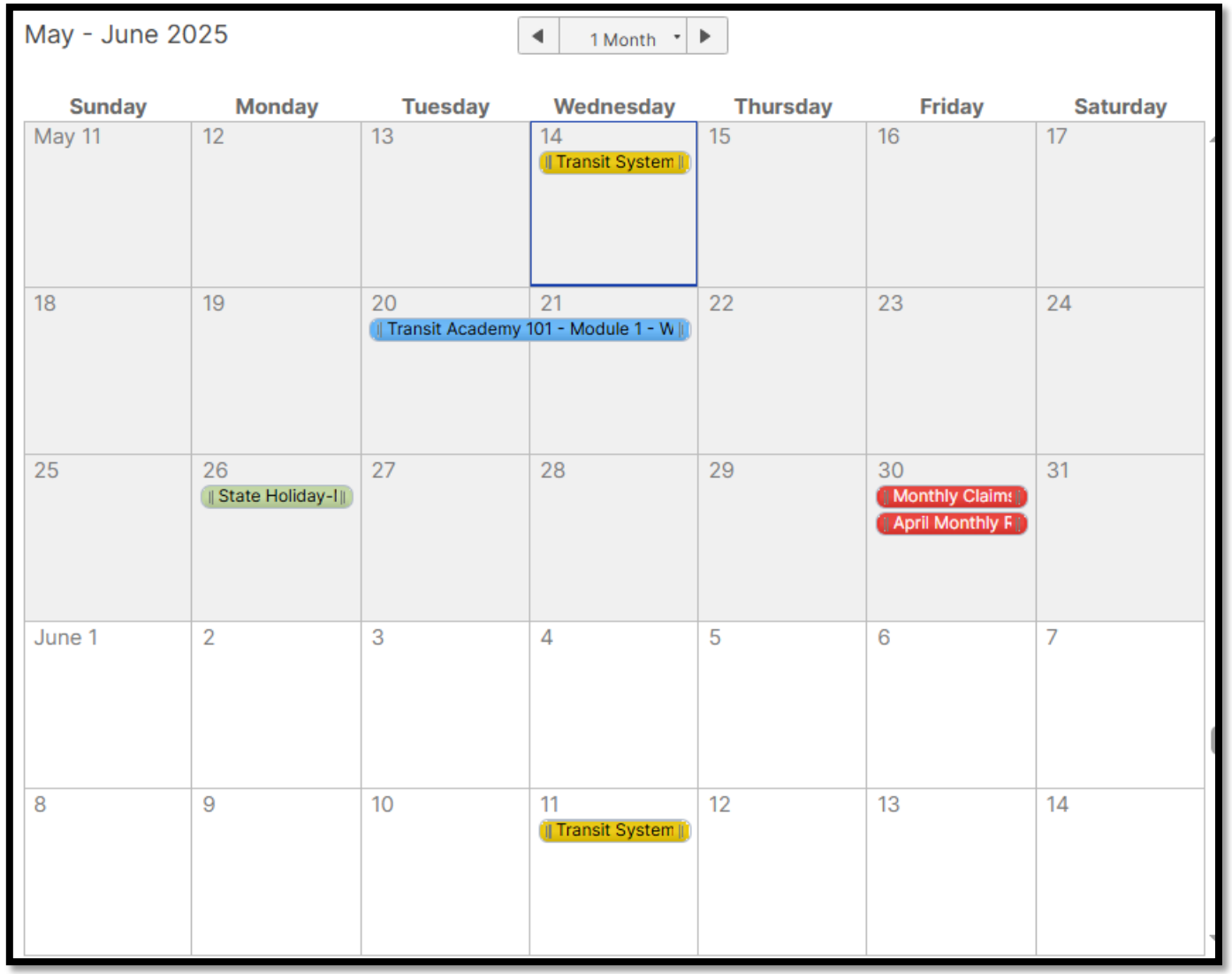
- 6/23/2025 9:00am-4:00pm
  - Duplin County Transit 144 Duplin Commons Dr. Kenansville, NC 28349
  - Succession Planning Kenansville-June 23, 2025

- 6/25/2025 9:00am-4:00pm
  - RCATS / The Harry and Jeanette Weinberg Adult REC 347 West Salisbury Street Asheboro, NC 27203
  - Succession Planning- Asheboro- June 25, 2025

- 6/27/2025 9:00am-4:00pm
  - Goodwill Career Center 1616 Patton Avenue Asheville, NC 28806
  - Succession Planning- Asheville- June 27, 2025

Calendar & Resource Updates

Transit Communication Hub



Important Dates – Next 30 Days

Reporting Due:

- **Monthly Claims Due** – 5/30
- **ROAP Report (APR)** – 5/30

Meetings:

- **Next Transit Call** is on 06/11/25

Training:

- Transit Academy 101 Module 1 – 05/20-5/21 (Winston-Salem)

State Holiday:

Memorial Day – 05/26