



NORTH CAROLINA

Department of Transportation




Integrated Mobility Division Transit Systems Call

October 8, 2025


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Finance Updates



Finance Updates

Ursula Banks has joined the IMD Finance team as the accounting specialist for the Western Piedmont Region. Ursula retired from the Department of Public Instruction with 36 years of service, and she brings a wealth of knowledge and experience in Grants and Budget management. uvbanks@ncdot.gov (919) 707-4671



Finance Updates

September claims due



October 30, 2025

1st Quarter claims due



October 30, 2025

The new IDP claim
process started



October 1, 2025

Finance Updates

- All claims must be submitted in the new format. More information can be found on the finance webpage at <https://connect.ncdot.gov/business/Transit/Pages/Transit-Financial.aspx>
- If you need assistance with your claims, please feel free to reach out to your accounting specialists.

Finance Updates

Dates	Task/Event
July 1, 2025	Grant fiscal year start
July 30, 2025	All final claims are due
August 30, 2025	July claims due
September 30, 2025	August claims due
October 30, 2025	September claims due
October 30, 2025	1st qtr claims are due
November 30, 2025	October claims due
December 30, 2025	November claims due
January 30, 2026	December claims due
January 30, 2026	2nd qtr claims are due
February 28, 2026	January claims due
March 30, 2026	February claims due
April 30, 2026	March claims due
April 30, 2026	3rd qtr claims are due
May 30, 2026	April claims due
June 30, 2026	May claims due
July 30, 2026	June claims due
July 30, 2026	4th qtr claims are due

Monthly claims are due by the 30th of each month

Finance Updates

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

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)

Timeline

Dates	Task/Events
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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

Myra Freeman
Finance Manager
Integrated Mobility Division
North Carolina Department of Transportation
(919) 707-4672 (Office)
msfreeman1@ncdot.gov

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Finance Updates

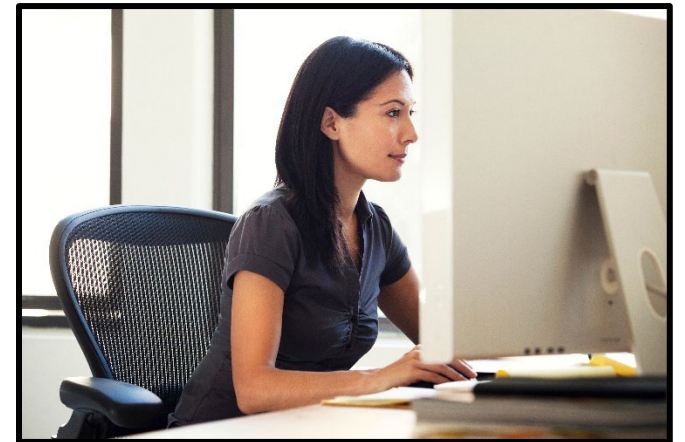
Region	Name	Phone Number	Email Address
Finance Manager	Myra Freeman	919-707-4672	msfreeman1@ncdot.gov
Accountant	Jocelyn Valdez	919-707-4683	jpetatanvaldez@ncdot.gov
Eastern Piedmont	Tanisha O'Keefe	919-707-4689	ttokeefe@ncdot.gov
Western Piedmont	Ursula Banks	919-707-4671	uvbanks@ncdot.gov
Coastal Plains	Equila Drakeford	919-707-4680	ezdrakeford@ncdot.gov
Mountains	Monique Frasier	919-707-4681	msfrasier@ncdot.gov



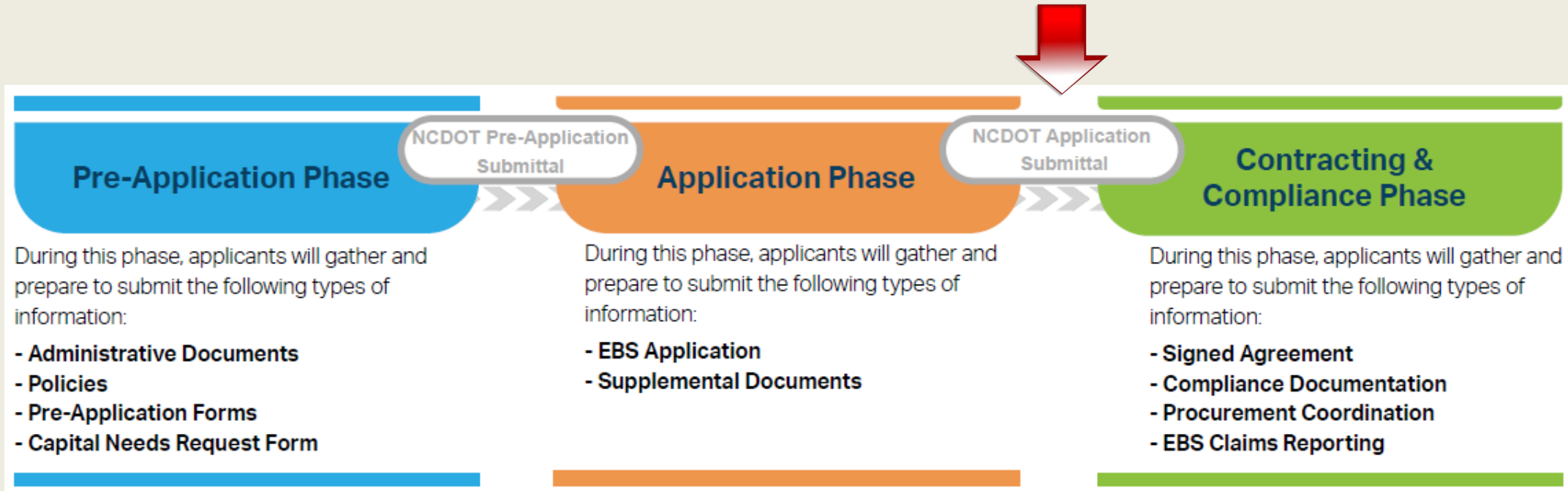
Grant Administration Updates

New IMD Grants Administrator

- IMD's Grants Administration Section is please to welcome our new Grants Administrator Casondra Hamilton.
- She joins us from South Carolina Department of Public Health where she held a similar grants administration position.
- Casondra is currently working with the Unified Grant Application, ROAP and SMAP programs.
- We are very happy Casondra joined our team.



FY 27 Unified Grant Application (UGA) Process



Key Dates:

- The FY27 Unified Grants Application (UGA) cycle is April 1 – October 3, 2025
- The Application Phase closed on **Friday, October 3rd**
- RGSs review and approve submitted grant applications October – December
- The Contracting and Compliance Phase is July 1, 2025 – June 30, 2026

UGA Grant Application Page 1 of 2 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:

FY26 ROAP Application

FY26 SMAP Application

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.

News & Updates

September 29, 2025 -

ROAP and SMAP applications are available to download and complete. The due date is Friday October 24th. The anticipated disbursement date is the week of November 17th.

August 12, 2025 -

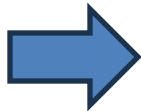
IMD recently completed Subrecipient Training for Intelligent Document Processing (IDP). Below are a few resources from that training.

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**



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

- The ROAP and SMAP applications were posted to the UGA page in Connect on Monday, September 29th. Notification went out that day with the information, submission instructions, and link to the UGA page to download the applications.
- Completed ROAP and SMAP applications are to be submitted through SmartSheet – instructions and link were included in the program notification.
- *The FY27 5303 application package and allocation table will be posted later in the fall. MPO contacts will be notified via e-mail when it is available and the link to use to download it from the UGA page on IMD's Connect site.*
- Applications were due in EBS by **Friday, October 3rd**. Required documents should be uploaded in your SmartSheet workspace by the same date.
- Regional Grant Specialists are available to answer questions as you proceed through the application process.



Estimated FY26 ROAP Program Timeline

- Under the continuation budget, IMD used the ROAP and SMAP allocations from FY25 to create the FY26 base allocation amounts and adjusted as necessary.
- ROAP and SMAP tables and applications have been posted to the IMD Connect page on the UGA page.
- Signed application(s) due to IMD within 30 days.
- Estimated time for disbursement is early-mid November. Due to delayed ROAP application period, the 1st and 2nd disbursements will be sent in one deposit.

FY26 ROAP Allocation and Disbursement Updates Compared to FY25

Using the established formula, the initial allocation remained largely consistent between FY25 and FY26.

Initial Allocation by Formula FY25				
County	EDTAP	EMPL	RGP	Total
County A	\$ 108,982	\$ 49,189	\$ 73,763	\$ 231,934
County B	\$ 61,152	\$ 10,526	\$ 71,352	\$ 143,030
County C	\$ 71,290	\$ 13,025	\$ 81,550	\$ 165,865
County D	\$ 56,311	\$ 6,554	\$ 57,656	\$ 120,521
County E	\$ 52,587	\$ 4,693	\$ 50,523	\$ 107,803

Initial Allocation by Formula FY26				
County	EDTAP	EMPL	RGP	Total
County A	\$ 113,127	\$ 42,793	\$ 73,431	\$ 229,351
County B	\$ 63,479	\$ 9,157	\$ 71,029	\$ 143,665
County C	\$ 74,001	\$ 11,330	\$ 81,181	\$ 166,512
County D	\$ 58,454	\$ 5,701	\$ 57,395	\$ 121,550
County E	\$ 54,587	\$ 4,082	\$ 50,295	\$ 108,964

- There were minor changes due to a correction of approximately \$86K made prior to running the formula.
- Additionally, there was an increase in EDTAP funds relative to EMPL and RPG. While this did not affect the total amount of funds distributed, it resulted in a redistribution across categories.

Initial Allocation CHANGE by Formula FY25 to FY26				
County	EDTAP	EMPL	RGP	Total
County A	\$ 4,145	\$ (6,396)	\$ (332)	\$ (2,583)
County B	\$ 2,327	\$ (1,369)	\$ (323)	\$ 635
County C	\$ 2,711	\$ (1,695)	\$ (369)	\$ 647
County D	\$ 2,143	\$ (853)	\$ (261)	\$ 1,029
County E	\$ 2,000	\$ (611)	\$ (228)	\$ 1,161

FY26 ROAP Allocation and Disbursement Updates Compared to FY25

First disbursements were calculated using the same method in both FY25 and FY26. The initial allocation was determined by formula, and any unspent funds from the previous year (carryover) were subtracted to calculate the distribution amount.

- Changes in carryover funds directly impact the first disbursement.
- For example, County A had \$10,857 in unspent funds from FY24, which reduced its first FY25 distribution. In FY26, County A had no carryover, resulting in a higher first allocation. Conversely, counties with higher carryover amounts saw greater reductions in their first disbursement.

Initial Allocation by Formula FY25				
County	EDTAP	EMPL	RGP	Total
County A	\$ 108,982	\$ 49,189	\$ 73,763	\$ 231,934
County B	\$ 61,152	\$ 10,526	\$ 71,352	\$ 143,030
County C	\$ 71,290	\$ 13,025	\$ 81,550	\$ 165,865
County D	\$ 56,311	\$ 6,554	\$ 57,656	\$ 120,521
County E	\$ 52,587	\$ 4,693	\$ 50,523	\$ 107,803

Unspent FY24 Funds				
County	EDTAP	EMPL	RGP	Total
County A	\$ 10,857	\$ 50,688	\$ 75,645	\$ 137,190
County B	\$ 62,663	\$ -	\$ -	\$ 62,663
County C	\$ 11,899	\$ -	\$ -	\$ 11,899
County D	\$ -	\$ -	\$ 53,345	\$ 53,345
County E	\$ -	\$ -	\$ -	\$ -

FY25 First Disbursement				
County	EDTAP	EMPL	RGP	Total
County A	\$ 98,125	\$ -	\$ -	\$ 98,125
County B	\$ -	\$ 10,526	\$ 71,352	\$ 81,878
County C	\$ 59,391	\$ 13,025	\$ 81,550	\$ 153,966
County D	\$ 56,311	\$ 6,554	\$ 4,311	\$ 67,176
County E	\$ 52,587	\$ 4,693	\$ 50,523	\$ 107,803

Initial Allocation by Formula FY26				
County	EDTAP	EMPL	RGP	Total
County A	\$ 113,127	\$ 42,793	\$ 73,431	\$ 229,351
County B	\$ 63,479	\$ 9,157	\$ 71,029	\$ 143,665
County C	\$ 74,001	\$ 11,330	\$ 81,181	\$ 166,512
County D	\$ 58,454	\$ 5,701	\$ 57,395	\$ 121,550
County E	\$ 54,587	\$ 4,082	\$ 50,295	\$ 108,964

Unspent FY25 Funds				
County	EDTAP	EMPL	RGP	Total
County A	\$ -	\$ 54,784	\$ 70,532	\$ 125,316
County B	\$ 60,114	\$ -	\$ -	\$ 60,114
County C	\$ -	\$ -	\$ -	\$ -
County D	\$ -	\$ -	\$ 43,016	\$ 43,016
County E	\$ -	\$ -	\$ -	\$ -

FY26 First Disbursement				
County	EDTAP	EMPL	RGP	Total
County A	\$ 113,127	\$ -	\$ 2,899	\$ 116,026
County B	\$ 3,365	\$ 9,157	\$ 71,029	\$ 83,551
County C	\$ 74,001	\$ 11,330	\$ 81,181	\$ 166,512
County D	\$ 58,454	\$ 5,701	\$ 14,379	\$ 78,534
County E	\$ 54,587	\$ 4,082	\$ 50,295	\$ 108,964

FY26 ROAP Allocation and Disbursement Updates

Compared to FY25

For many systems, the largest change in total disbursements from FY25 to FY26 was due to ineligibility for the second disbursement. Systems that had more than 5% of their FY25 funds unspent were not eligible to receive a second disbursement in FY26. The total amount of funds available for the second disbursement also decreased from \$2,406,685 in FY25 to \$1,408,338 in FY26.

As shown in the example, the ineligibility of County A, County B, and County D for a second disbursement had the most significant impact on their FY26 disbursements.

FY25 First Disbursement				
County	EDTAP	EMPL	RGP	Total
County A	\$ 98,125	\$ -	\$ -	\$ 98,125
County B	\$ -	\$ 10,526	\$ 71,352	\$ 81,878
County C	\$ 59,391	\$ 13,025	\$ 81,550	\$ 153,966
County D	\$ 56,311	\$ 6,554	\$ 4,311	\$ 67,176
County E	\$ 52,587	\$ 4,693	\$ 50,523	\$ 107,803

FY25 Second Disbursement				
County	EDTAP	EMPL	RGP	Total
County A	\$ 8,225	\$ 3,158	\$ 5,380	\$ 16,763
County B	\$ 4,606	\$ 725	\$ 5,342	\$ 10,673
County C	\$ 5,492	\$ 975	\$ 6,789	\$ 13,256
County D	\$ 4,310	\$ 460	\$ 4,290	\$ 9,060
County E	\$ 3,995	\$ 333	\$ 3,916	\$ 8,244

FY26 First Disbursement				
County	EDTAP	EMPL	RGP	Total
County A	\$ 113,127	\$ -	\$ 2,899	\$ 116,026
County B	\$ 3,365	\$ 9,157	\$ 71,029	\$ 83,551
County C	\$ 74,001	\$ 11,330	\$ 81,181	\$ 166,512
County D	\$ 58,454	\$ 5,701	\$ 14,379	\$ 78,534
County E	\$ 54,587	\$ 4,082	\$ 50,295	\$ 108,964

FY26 Second Disbursement				
County	EDTAP	EMPL	RGP	Total
County A	\$ -	\$ -	\$ -	\$ -
County B	\$ -	\$ -	\$ -	\$ -
County C	\$ 7,416	\$ 1,097	\$ 8,301	\$ 16,814
County D	\$ -	\$ -	\$ -	\$ -
County E	\$ 5,886	\$ 408	\$ 5,220	\$ 11,514

ROAP Reporting

"I'm dreaming
of a monthly
ROAP report..."
They are due on
the 30th of each
month



ROAP reporting timeline:

- ROAP reports will resume when the FY26 SmartSheet allocation page is complete. Notification will be sent when reports should begin.
- ROAP reports are due **30** days after the end of the reporting month (i.e., July report is due August 30th)
- The FY26 ROAP report link will be sent out when the workspace is open.
- **Transfer of ROAP funds must be reported in month transferred – not at a later date**
- FY26 ROAP report confirmations and/or corrections are due within 4 days of receiving the ROAP Report e-mail after the RGSs approve the report.
- **The FY26 confirmation is your approval the information is correct, and reports are final.**



Procurement

Procurement

Vehicle Ordering

- Please move forward with your procurements of outstanding vehicle projects ASAP if you have not done so already; FY26 vehicles **MUST** be ordered prior to December 30th, 2025
 - IMD will be following up w/ systems in November to check on any unordered vehicles to establish the procurement timeline

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 is now on the IMD Procurement Page
- Please reach out to Chris Dodson (cbdodson@ncdot.gov; 919-707-4696) with any questions or concerns

Training Updates



Transportation Leadership Development Program (TLDP) – Spring 2026

- 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.

NCDOT-IMD Strategic Training Program Review and Updates

- **The IMD Strategic Training Program is coming off a busy September with lots of training.**
 - September training opportunities were well attended – Thank You for making to participate in these training offerings!
- **We launched a new certification course, Passenger Assistance Techniques (PAT), in two locations. The participants' responses were extremely positive. They noted that there are differences in the PAT class delivery and methodology from PASS.**
- **We intend to offer PAT Trainer and PASS Trainer in 2026. Each transit system may choose to have a certified trainer of one or both programs.**
- **Speaking of PASS classes:**
 - We will not be offering another PASS Trainer class until Spring 2026.
 - However, if you are currently PASS Trainer certified, you should work to update your certification to teach PASS 8. CTAA will no longer recognize PASS 7 as a valid program after December 10, 2025.
 - You should have received an email from CTAA on the process to update your certification. Questions about updating your certification should be directed to CTAA.
 - Updating your certification DOES NOT change the expiration date for your current certification.
 - If you have a certification that will expire between now and Spring (March timeframe), you need to utilize CTAA's online recertification process to remain a certified PASS Trainer.

COMING SOON . . .

- **The 2025 Annual Training Survey will be emailed before the end of October.**
 - The survey will be open for two weeks
 - The Transit Director, the Training Manager, or both can complete the survey.
 - If someone from your system does not complete the survey, I will reach out to you to you directly to complete it. (Some remember how persistent I can be).
- **The 2025 survey will focus on understanding the classes/courses you need that would best help your organization become successful, safe, and (as always) compliant.**
- **Please reach out to me if you have questions or suggestions about the survey.**



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NCDOT-IMD Strategic Training Program

October 2025 Training Opportunities

~~• Accident/Incident Preparedness – Virtual~~ TRAINING COMPLETE!

- ~~• October 7, 2025~~
- ~~• Registration Coming Soon – Details at [NCDOT Communications Hub Calendar](#)~~
- ~~• Virtual Training – Please Register Each Participant Individually~~

- **Implementation of the ADA in Public Transportation - Virtual**

- October 14, 2025
- 2:00 pm – 4:00 pm
- [Implementation of the ADA in Public Transportation - Registration Link](#)
- Virtual Training - Please Register Each Participant Individually

- **Title VI of the Civil Rights Act - Virtual**

- October 22, 2025
- 2:00 pm – 4:00 pm
- [Title VI of the Civil Rights Act of 1964 - Registration Link](#)
- Virtual Training - Please Register Each Participant Individually

COMPLETE TRAINING INFORMATION & DESCRIPTIONS CAN BE FOUND AT THIS LINK: [NCDOT-IMD Transit Communication Hub](#)

NCDOT-IMD Strategic Training Program

November 2025 Training Opportunities

- **STEP Listening Session – Virtual**

- November 13, 2025
- 10:00 am – 11:30 am
- Roundtable discussion to receive input on training and resource needs
- Meeting size limited to 30 participants
- Every rural system is required to attend at least one Listening Session per year
- Registration Coming Soon – Details at [NCDOT Communications Hub Calendar](#)

- **Effective Marketing Strategies**

- November 19, 2025
- 10:00 am – 12:00 pm
- Registration Coming Soon – Details at [NCDOT Communications Hub Calendar](#)
- Virtual Training - Please Register Each Participant Individually

THERE ARE NO TRAININGS PLANNED, AS OF THIS TIME, FOR DECEMBER 2025 – IF YOU NEED A PARTICULAR TRAINING, PLEASE EMAIL ME AT ext-kpangel@ncdot.gov

2026 Boot Camp

- **2026 Boot Camp Registration is Open**
 - March 17-18, 2026
 - NC State University – ITRE
 - [2026 Boot Camp Registration Link](#)
 - Transit Boot Camp is designed to provide new transit managers with an understanding of the requirements of doing business with IMD
 - Attendees will gain insight into
 - The various programs IMD supports
 - Key requirements to achieve and maintain compliance with Federal and State requirements
 - Areas of guidance IMD can provide
 - Processes required while doing business with IMD as a sub-recipient of federal funds
 - Valuable resources and tools that can be used in managing and operating a rural transit system in NC
 - An in-depth review of the Unified Grant Application process and applying for grants will be provided.
- **NCDOT-IMD strongly recommends Managers with three years or less attend Boot Camp to gain working knowledge of doing business with IMD**
- **It is also recommended that, following attendance at Boot Camp, the Transit Manager attend Transit Academy 101 to develop a deeper understanding of Public Transportation Management and FTA & NCDOT requirements.**



Calendar & Resource Updates

Transit Communication Hub

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
October 5	6	7 Accident/Incident	8 Transit System	9	10	11
12	13	14 Implementation	15 Charter Report Program Income Training Report Transportation Vehicle and Lif	16	17	18
19	20	21	22 EAM Refresher Title VI of the C	23	24	25
26	27	28	29	30 Monthly Claim Quarterly Claim	31 OpStats Due	November 1
2	3	4	5 Transit System	6	7	8

Important Dates – Next 30 Days

Reporting Due:

- Charter Report – 10/15
- Program Income – 10/15
- Training Reports – 10/15
- Vehicle & Lift Maintenance – 10/15
- TDM Claims – 10/15
- Monthly & Quarterly Claims – 10/30
- OPSTATS – 10/31

Meetings:

- Next Transit Call is on November 5th.

Training:

- Implementation of ADA in Public Transportation – 10/14
- EAM Refresher Training – 10/22
- Title VI – 10/22

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>