

NORTH CAROLINA

Department of Transportation



















Integrated Mobility Division Transit Systems Call

AGENDA

- Director's Opening Remarks
- Finance Updates
- Grant Administration Updates
- Procurement Updates
- Compliance Updates
- Training Updates
- Special Project Updates
 - MOBI Awards
 - LCP Survey
- Calendar Updates

Finance Updates



Finance Updates

- All projects with a period of performance end date of June 30, 2024 will end at that time. All final reimbursement requests must be submitted in EBS on or before July 30, 2024. Please plan accordingly.
- IMD has issued blanket extensions for the following programs:

5310 ARPA
 5311 ARPA Intercity
 5311 ARPA Capital

• 5311 ARPA Oper 5311 CARES ADTAP 5311 CARES Oper

• 5311 CARES Intercity 5307 CARES Oper

- FY22 & FY23 Combined Capital vehicle projects in which vehicles will not arrive before the end of the fiscal year
- The new period of performance end date for these projects will be June 30, 2025.

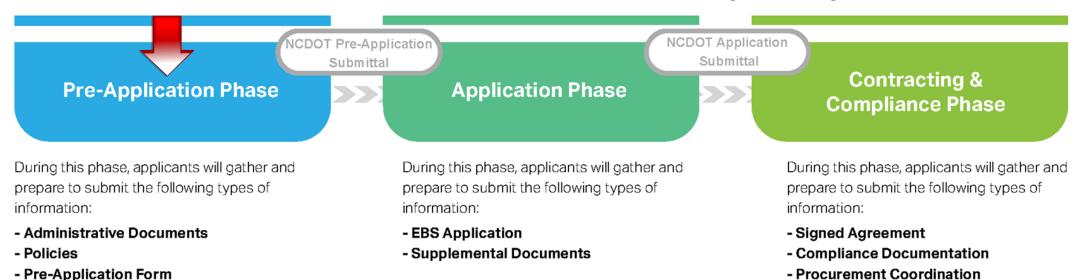
- If you have received your vehicles and have sent the inspection forms to Faye McCullen, please submit your request for reimbursement in EBS asap. You must include a copy of your check as proof of payment or if you haven't paid for the vehicles, you can submit an Advance payment form with your reimbursement request. Upon receipt of payment from NCDOT, you must pay the vendor within 3 days.
- This is a reminder approved budget line items G313, G611 (private) and G641 (public) are for trips only and not for salary and fringes.

- Prior to submitting your final claim, a change request must be submitted in EBS to balance the budget in the last quarter on all projects with line items in overdraft
- If you have started a claim, and need to submit a change request, you must contact <u>EBSSupport@ncdot.gov</u> 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



- EBS Claims Reporting

Key Dates:

- The Pre- Application Phase opened on April 1, 2024. The Application Phase will open in EBS on July 1, 2024
- All Grant Applications are due in EBS- Friday October 4, 2024
- By June 30, 2024 all vehicle mileage should be updated in Asset Works to be included on the FY 26 vehicle replacement list
- The combined capital application will be opened in EBS mid July and will include the replacement vehicle list

Unified Grant Application (UGA) Process

Key Updates

- FTA has released the Certs and Assurances. Please sign and complete the Certs and Assurances and upload them in the EBS dropbox by May 29, 2024.
- The \$2,500 per <u>revenue vehicle</u> insurance cap has been removed from the Admin budget. Systems can budget for up to the actual insurance rate for the revenue vehicles if desired.
- The UGA page has a lot of useful information refer to the screenshot below for a sample, i.e., <u>Unified Grant Application (UGA) Program Tutorial Phase I Pre-application How-to-video</u>
- https://connect.ncdot.gov/business/Transit/Pages/Unified-Grant-Application.aspx

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, 2024:

FY26 Unified Grant Application (UGA) (Last Modifed March 15, 2024)

*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 \$MAP, 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 FY26 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 folloing 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.

- · FY26 UGA Pre-Application (Phase 1) Quick Reference Guide
- FY26 UGA Application (Phase 2) Quick Reference Guide
- FY26 UGA Application Contracting & Compliance (Phase 3) Quick Reference Guide
- Smartsheet Quick Reference Guide

Funding Program Cheat Sheet – this documents provides information to sub-recipients on the various programs and is a quick reference guide.

FY26 NCDOT IMD UGA Funding Cheat Sheet

Timeline

DATES	TASK/EVENT
April 1, 2024	Grant Application Package Distributed
April 1 - October 4, 2024	Reginal Grant Specialists Available to Assist Grantees with Questions
June 3, 2024	Pre-Application Due to NCDOT
July 1, 2024	Program Applications in EBS Open
October 4, 2024	EBS Grant Application Due to NCDOT

News & Updates

April 1, 2024 -

IMD has published the FY26 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 tracking sheet for 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.

IMD has prepared following short video tutorials for each phase of the UGA.

- Unified Grant Application (UGA)
 Program Tutorial
- Phase I Pre-application How-tovideo
- Phase II Application How-to-video (coming soon)
- Phase III Contracting & Compliance How-to-video (coming soon)

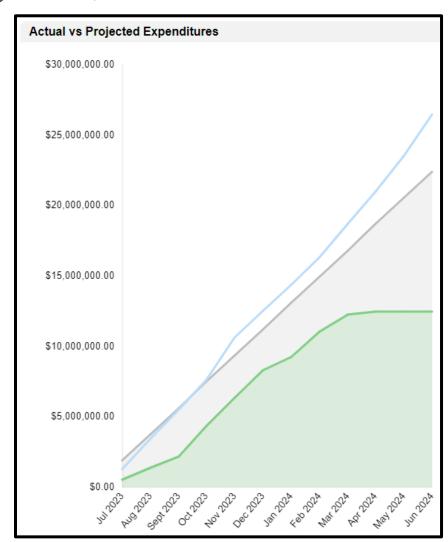
If you have questions or need additional information, please contact your assigned Regional Grant Specialist, or contact me at cmfreitag@ncdot.gov.

UGA Feedback Link

ROAP Overview – May 15, 2024

Overall ROAP Stats						
Primary	Description	Amount	% Total Allocation			
ROAP Allocation	Funds approved from legislators	\$18,678,339				
Carryover	Unspent funds from previous year	\$3,736,327				
Allocation + Carryover	3. Total of 1 + 2	\$22,414,666				
Transferred Out	Transferring ROAP funds to match eligible grant programs	\$940,765	5%			
YTD Expenditures	Total approved expenses to date	\$16,633,921	89%			
Total Balance	6. Remaining funds to date	\$4,839,980	22 %			

EDTAP, EMPL, RGP Stats						
SFY2023	Net Allocation	Expenditures	% Expended	County Funds Used		
EDTAP (Elderly & Disabled Transportation Assistance Program)	\$9,868,010	\$7,304,809	74%	\$736,336		
EMPL (Employment Assistance Program)	\$2,672,279	\$2,350,638	88%	\$981,641		
RGP (Rural General Public Program)	\$8,909,748	\$6,978,474	78%	\$1,143,204		
Totals	\$21,450,037	\$16,633,921	78%	\$2,861,182		



FY24 ROAP Analysis: Upcoming Reporting Dates

- February due April 15th
- March due May 15th
- April due June 15th
- May due July 15th
- June due July 30th. This report is due early so the ROAP reconciliation can begin and prepare for the FY25 ROAP application allocation and disbursement information.

<u>Monthly</u> ROAP reporting provides 45 days after the end of each month to submit reports. IMD encourages transit systems to use those days to collect trip and expense information, and back-up documentation to prepare an accurate report.



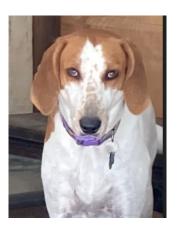
Looking ahead, end of fiscal year is only 2 months away and the final ROAP report is due on July 30th. Systems with late or missing reports need to begin now to catch up.

FY24 ROAP Analysis:

ROAP Reporting Update as of March 13, 2024

- July reports due September 15th 2 reports not submitted
- August reports due October 15th 3 reports not submitted
- September reports due November 15th 3 reports not submitted
- October reports due December 15th 3 reports not submitted
- November reports due January 15th 2 reports not submitted
- December reports due February 15th 2 reports not submitted
- January reports due March 15th 6 reports not submitted, 2 submitted but not approved at this time
- February reports due April 15th 10 reports not submitted, 4 submitted but not approved at this time
- March reports due May 15th 52 reports submitted, 11 reports submitted but not approved at this time

FY24 ROAP Closeout:



Looking ahead, end of fiscal year is only 2 months away and final the ROAP report is due on July 30th. Systems with late or missing reports need to begin now to catch up.

FY24 ROAP reconciliation will begin first of August to prepare for the FY25 ROAP allocation and disbursement.

ROAP reports not submitted when reconciliation is in progress will be considered as unspent funds.

ROAP Monthly Allocation Balance Update Report

The monthly ROAP Allocation Balance report which shows an approximation of running funds balance in each ROAP program.

The report will be automatically sent from SmartSheet on the 8th of the month, prior to the due date of the monthly reports.

The balances in the reports will not include expenditures that have been submitted but not yet approved.

The balance reports are to provide an estimated update of the ROAP balances but transit directors and/or Finance directors are ultimately responsible for keeping up with program funds and reports submitted.

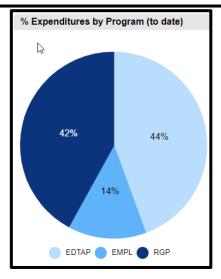
FY24 ROAP Report SmartSheet Link

https://app.smartsheet.com/b/form/03221c3f6b9645a89b45ab176f03680b

DRAFT External ROAP Dashboard

Primary	Description	n		Amount		% Total Allocation
ROAP Allocation		approved from legisla	itors		3,678,339	70 Total 7 tilocation
Carryover	2. Unsper	nt funds from previous	s year	\$3	3,736,327	
Allocation + Carryover	3. Total of	1+2		\$22	2,414,666	
Transferred Out	4. Transfe programs	rring ROAP funds to	match eligible gran	t	\$940,765	5%
YTD Expenditures	5. Total ap	proved expenses to	date	\$16	5,633,921	89%
Total Balance		iing funds to date		\$4	1,839,980	22%
Total Balance EXTERNAL EDTAP, EMPL, RGP Sta		ning funds to date	Expenditures	\$4	1,839,980 County Fund	
EXTERNAL EDTAP, EMPL, RGP Sta	ats		Expenditures \$7,304,809		County Fund	ls Used
EXTERNAL EDTAP, EMPL, RGP Sta SFY2023 EDTAP (Elderly & Disabled Transportation /	ats	Net Allocation	\$7,304,809	% Expended	County Fund	
EXTERNAL EDTAP, EMPL, RGP Sta SFY2023 EDTAP (Elderly & Disabled Transportation of Program)	ats	Net Allocation \$9,868,010	\$7,304,809	% Expended 74%	County Fund	ls Used \$736,33

% Transit Systems	Reported by Month
July 2023	97%
August 2023	96%
September 2023	96%
October 2023	96%
November 2023	98%
December 2023	97%
January 2024	93%
February 2024	88%
March 2024	55%
April 2024	11%
May 2024	0%
June 2024	0%
The percentage unapproved RO	s do not include AP reports.

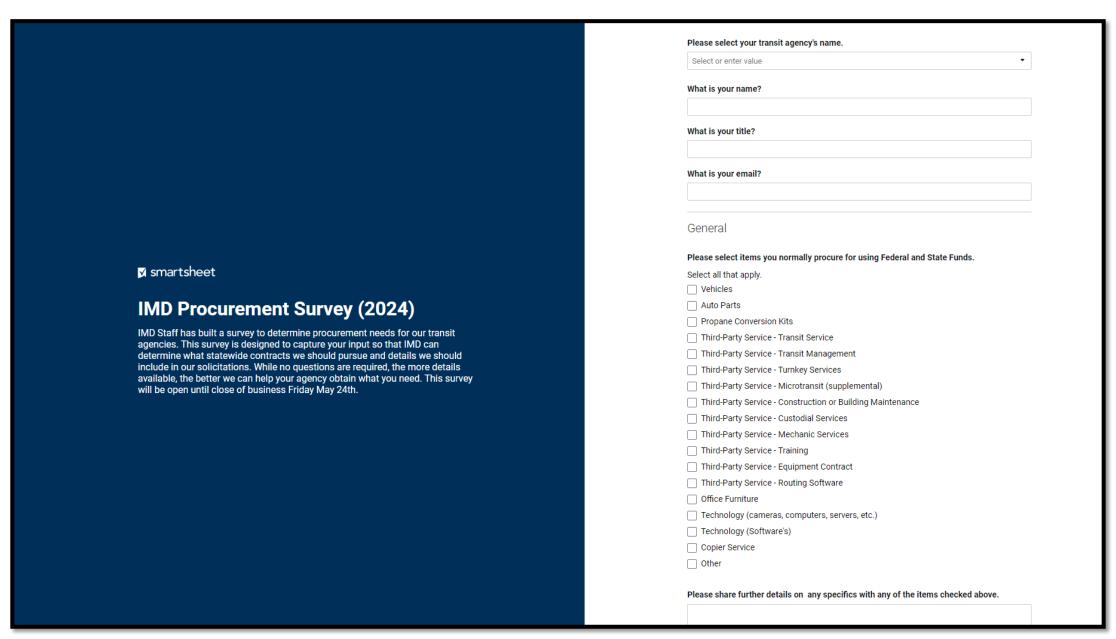




Procurement Updates – Camera Contract

- NCDOT Contract for Mobile Digital Video Recording Systems (Vehicle Cameras)
 - Contract expired as of March 15th, 2024
 - Systems will currently need to solicit for quotes or issue a formal solicitation (for purchases over \$90,000) to procure for vehicle camera systems if they have identified funding for that line item
 - Survey out right now (distributed by Blair Chambers through email as of 5/8/24) to gauge statewide procurement needs
 - Be wary of existing NC statewide term contracts (or contracts outside of NC) as they may not include Federal clauses in the original solicitation; make sure to verify compliance with contract officer
 - This includes NC Dept of Administration/NC Dept of Information Technology contracts
 - Consider regional joint procurements for better pricing/collaborative opportunities
 - Please feel free to contact Chris Dodson, Procurement Manager for further questions
 - Chris Dodson
 - cbdodson@ncdot.gov
 - 919-707-4696

Procurement Survey





2024 Compliance Reviews

- CY2023
 - 5310 Non-Profit Reviews
 - 24 Total Reviews
 - 24 Conducted
 - 24 Closed
 - 5311 Transit System Reviews
 - 19 Total Reviews
 - 11 Conducted
 - 5 In Process
 - 2 Scheduled
 - 11 Closed
- CY2024
 - 5311 Transit System Reviews
 - 29 Total Reviews
 - 7 In Process
 - 1 Closed
 - 21 to begin mid to late June

alendar Year 2024			
Alamance County Transportation Authority (ACTA)	Albemarle Regional Health Services (ICPTA)	Alleghany County	
Ashe County Transportation Authority	Avery Co. (ACT)	Bladen County (BARTS)	
Buncombe County/Mountain Mobility	Clay County	Gaston County	
GoWake Access	Guilford County Transportation and Mobility Services (TAMS)	Hoke Area Transit Service (H.A.T.S.)	
Johnston County Area Transit (JCATS)	Kerr Area (KARTS)	Lee County (COLTS)	
Madison County Transportation Authority	McDowell County Transportation	Mountain Projects Inc. Haywood Co.	
Pender Adult Services Inc.(PAS)	Polk County	Rockingham (ADTS)	
Rowan Transit System (RTS)	Rutherford County Transit	Sampson County	
Scotland County (SCATS)	Tar River Transit / City of Rocky Mount	Union County Transportation	
Western Carolina Community Action, Inc. (WCCA- Apple Country (Henderson County)	Western Piedmont Regional Transit Authority	Wilkes Transportation Authority (WTA)	



NCDOT-IMD Strategic Training Program May Training

- Census Bureau Data Collection Training Session 2 Online
 - May 16 2:00 3:00 pm
 - Census data training on how to access the data needed for updating your Title VI plans using the Census Bureau's main data tool, data.census.gov
 - https://forms.office.com/Pages/ResponsePage.aspx?id=3IF2etC5mkSFwzCbNftGeax4qTdKxhMtlGsOLhXyxNUMkE4OFFQRzdPUDRSTkVKVVc1TlBFUkVDSC4u
- Fully Allocated Cost (FAC) Model Online
 - May 23 1:00 2:00 pm
 - This training is to help you understand the subsidized and unsubsidized cost of providing service per mile, trip, and hour
 - FAC information is essential for establishing data-driven rates for your contracts and other funding sources
- Transit Academy 101 Module 1 In Person
 - Registration Closed

NCDOT-IMD Strategic Training Program June Training

- Fully Allocated Cost Model Online
 - June 18 10:00 am 11:00 am
 - This training is to help you understand the subsidized and unsubsidized cost of providing service per mile, trip, and hour
 - FAC information is essential for establishing data-driven rates for your contracts and other funding sources
- Census Bureau Data Collection Training Session 3- Online
 - June 21 9:00 10:00 am
 - Census data training on how to access the data needed for updating your Title VI plans using the Census Bureau's main data tool, data.census.gov
 - https://forms.office.com/Pages/ResponsePage.aspx?id=3IF2etC5mkSFw-zCbNftGeax4qTdKxhMtlGsOLhXyxNUMkE4OFFQRzdPUDRSTkVKVVc1TlBFUkVDSC4u
- Transit Academy 101 Module 2
 - Registration Closed

NCDOT-IMD Strategic Training Program Other Training & Information

TRAINING OPPORTUNITIES LATER IN 2024

- OpStats
 - July 16 & 18
- Title VI
 - Last Week of July (Exact Date TBD)
- Advanced Mobility Device Securement (AMDS) NTI Training
 - September 17-18 and September 19-20
 - » Looking for 2 onsite host locations

Training Reminders

- Scheduled trainings are shown on IMD Calendar (In Blue) and have the link to register
 - https://connect.ncdot.gov/business/Transit/Pages/Transit-Communication-Hub.aspx
- All individuals attending virtual training should register via the registration link in order to get credit for attendance (when registration is required)
- Each person attending should register with a unique email address (can be a personal address)
- Training, including virtual, is for agencies that are sub-recipients of IMD.

NCDOT-IMD Strategic Training Program Transit Academy 101

- Inaugural Class begins this month
- 14 Participants
- Multiple Mentors
- Boot Camp 2 coming this Fall!

NCDOT-IMD Strategic Training Program Flash Training

Fare Increases and Changes

- The grantee must certify that it has a locally developed, documented process for soliciting and considering public comment before raising a fare or implementing a major reduction in service
- The grantee is responsible for defining a major reduction in service.
- A public meeting is not mandatory; however, an <u>opportunity</u> for a public meeting to solicit comments must be provided
- Fixed-Route providers must include Title VI requirements and include those in their Title VI plan

NCDOT-IMD Strategic Training Program Flash Training

Important Things to Remember:

- The re-establishing of fares (following COVID) or the returning of fares to original pricing DOES constitute a Fare Increase
- Although it is the transit system's responsibility to determine what a "major reduction" in service is, general industry standard is that any change that affects 10% or more of your ridership is in fact a major service reduction.
- **BEST PRACTICE**: Subrecipient should try to give passengers and IMD a minimum of 30 days notice before raising fares or implementing a substantial service change.



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2024 Mobi Awards

The goal of the Mobi Awards is to honor the multimodal projects in North Carolina for their transformational impacts on our communities

Awards plus Honorable Mentions will be given in six categories:

Rural, Small Urban, Urban, Large Urban, Innovation, MVP



ncdot.gov

2024 Mobi Awards

Hosted by the NC Department of Transportation in partnership with NC GO, NC Triangle Chapter of WTS and ITRE



Guidelines:

- Projects to include two or more modes (bike/ped, aviation, transit, rail, ferry, roadway)
- Construction/Implementation, Plan document has been completed in the past five-years for new applications
- Previous applicants still eligible, will need to re-submit
- High profile panel of judges will select the winners

Timeline:



August: Finalists Announcement & Event Registration



Winners will be
announced at MOBI
Awards Luncheon during
ACEC/NCDOT Joint
Transportation Conference

Statewide Locally Coordinated Plan

- Email was sent on May 1st with a zipped file and a 4-question survey to weigh in on the district recommendations
- Survey closes this Friday May 17th!
- We so far have 20 responses from agencies. We have no responses from anyone in District 9
- Strategic action items are intentionally high-level. You are not tied to the action items
- Action items are there to serve as an additional resource and planning resource, so your feedback is important!

Locally Coordinated Plan | 2025-29



District #9

- Prioritized Needs:
- New service types
- Accessible vehicle procurement
- Extended service span
- Service area expansion
- Weekend service
- Affordable transportation New trip types
- · Capital service purchase agreement

Very High Priorities









General Strategic Action Items

- Improve scheduling trip reservation time to 24 hours or less using improved scheduling software
- Implement real-time bus information
- Increase support for workforce connections
- Utilize scheduling software to determine popular origins and destinations
 - Increase access to regional hospitals
- Increase marketing and distribution of information
- Continue to replace vehicle lifts to remain accessible
- · Add connections to Asheville Regional Airport (AVL)

Strategic Action Items by Agency

Alleghany County*

- · Establish on-demand microtransit service in Sparta
- Establish fixed-route connection to Winston-Salem
- Establish Saturday service for fixed-route and demand response services
- . Extend Frostburg State University service to 10PM

AppalCART

- Add Sunday service
- Extend service hours to 10PM
- Extend service to all areas of Boone's city limits

Ashe County Transportation Authority*

- · Establish on-demand microtransit service in Jefferson
- Increase frequency on deviated fixed-route services to 30 minutes
- Extend weekday service hours to 10PM

Avery County Transportation Authority

- . Extend weekday service hours from 6AM to 10PM
- Establish Saturday service for demand response service

McDowell County Transportation*

- Establish on-demand microtransit service in Marion
- . Extend weekday employment trip span from 6AM to 10PM

Mitchell County Transportation Authority

- Establish on-demand microtransit service in Spruce Pine
- . Extend Pine Line Shuttle service span from 6AM to 10PM
- · Add Saturday service on Pine Line Shuttle and Demand Response service

Polk County Transportation Authority

- Extend service hours to 10PM
- . Establish regularly scheduled service to existing regional destinations for all trip purposes, based on demand
- . Upgrade existing phone system and offer smartphone app for scheduling Demand Response trips

*Denotes agency received §5310 funding during FY17-21 period

What's Next?

- Finalize comments on District Summaries
- Finalize Draft Plan
- Publish Plan early June
- Direct recipients will still apply for 5310 funds via UGA as in the past- no change to this process

Please reach out Hart Evans jhevans1@ncdot.gov with any additional questions

Calendar & Resource Updates

Transit Communication Hub

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
May 12	13	14	15 Transit System March Monthly	16 (i Census Bureau)	17	18
19	20	21 () 2024 N.C. TRAN	22 ISPORTATION SUMFILE	23 [[Multimodal Up	24	25
26	27	28	29 Transit Academy	30 101 - Module 1 (Int)	31 Monthly Claim:	June 1
2	3	4	5	6	7	8
9	10	11	12	13	14 April Monthly F	15

<u>Important Dates – Next 30 Days</u>

Reporting Due:

- March Monthly ROAP Report 05/15
- Monthly Claims 05/31

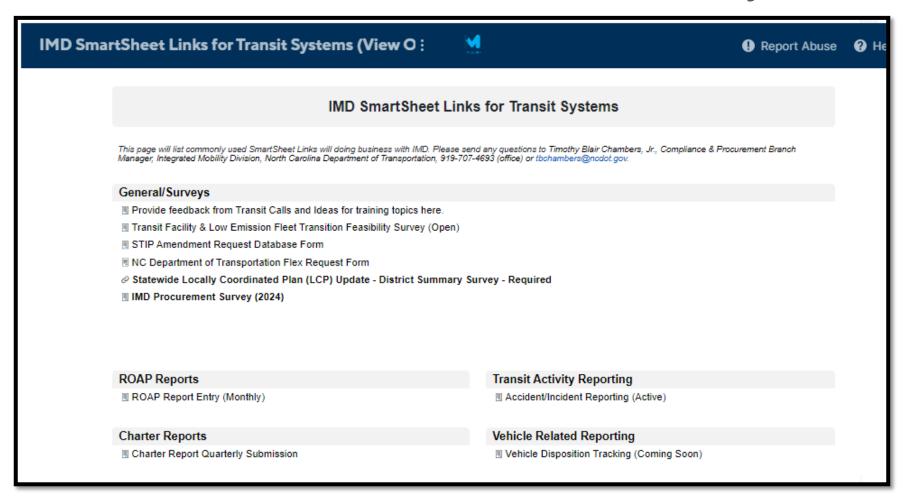
Training:

- Census Bureau Data Collection (2) 05/16
- Fully Allocated Cost Model Training -
- 2024 NC Transportation Summit 05/21 & 05/22
- Transit Academy 101 Mod 1 05/29 & 05/30

Meetings:

Next Transit Call is on 6/12/24

IMD SmartSheet Links for Transit Systems



Contact IMD

