



NORTH CAROLINA

Department of Transportation



Integrated Mobility Division Transit Systems Call

June 12, 2024

AGENDA

- Director's Opening Remarks
- Finance Updates
- Grant Administration Updates
- Compliance Updates
- Training Updates
- Special Project Updates
 - IMD Partner Survey
 - Contacts Update
- Calendar Updates

Finance Updates



Finance Updates

- We are in the last month of fiscal year 2024. All projects with a period of performance of June 30th will end at the end of the month. All final claim requests must be submitted in EBS on or before July 30, 2024.
- 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 EBSSupport@ncdot.gov to have them delete the claim in order to submit the change request.

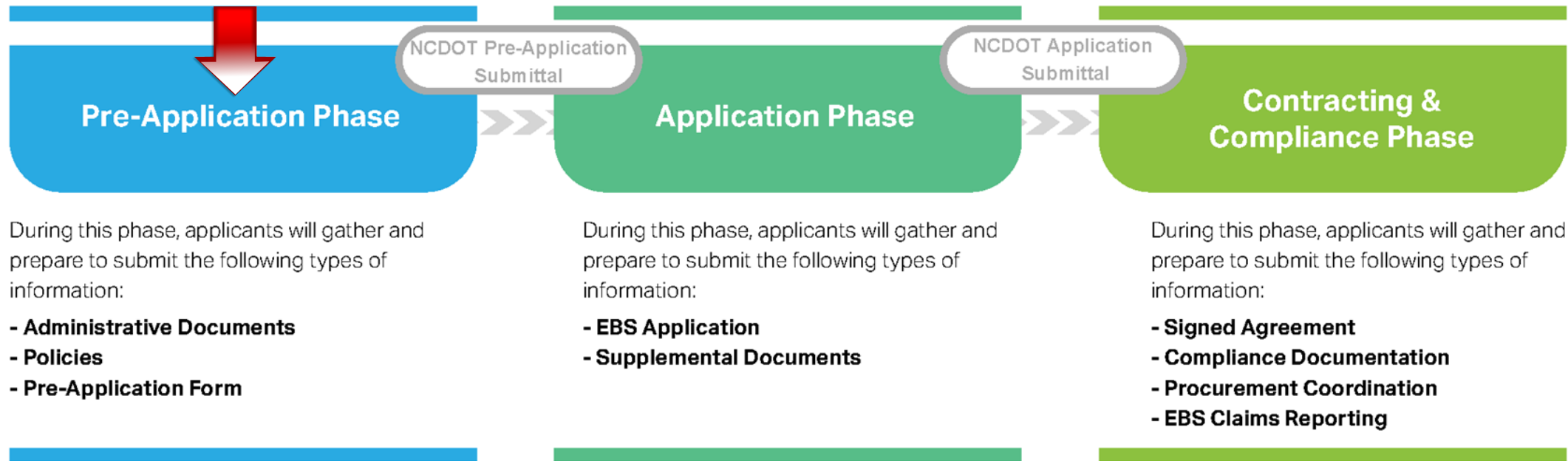
- Indirect Cost – When computing the indirect cost for your claim, the amount you are requesting should not exceed your approved rate.
- You can verify the rate you are claiming by calculating your expenditures from G121-G189 and multiplying that by your approved indirect cost rate.
- This approved rate is the rate reviewed and approved by Beth Gay or your cognizant agency.
- The finance team will be verifying the amounts you are drawing down with each claim going forward.

- FY25 federal contracts will not be issued via DocuSign until FTA approves IMDs grant awards.
- All other contracts should be issued via DocuSign by the end of July.
- Please reach out to your accounting specialists in you have any questions or need any additional assistance.



Grant Administration Updates

FY 26 Unified Grant Application (UGA) Process



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 FY 26 combined capital application will be opened in EBS mid July and will include the replacement vehicle list
- For any technical assistance, reach out to your RGS

Grant Applications Open July 1, 2024

- ▶ Capital Purchase of Service
- ▶ Section 5310
- ▶ Section 5311
- ▶ Urban Advanced Technology
- ▶ Urban Strategic Transportation Investments (STI)
- ▶ Rural STI
- ▶ Combined Capital (**Opens Mid July**)
- ▶ ConCPT Consolidation (CN)
- ▶ ConCPT Coordination (CO)
- ▶ Rural State Operating Funds (RO)
- ▶ Travelers' Aid
- ▶ Urban State Match
- ▶ Non-STI
- ▶ Mobility Manager
- ▶ Capital Cost of Contracting



Grant Applications Opening Later in the year

- ▶ 5303 Planning
- ▶ Rural Operating Assistance Program
- ▶ State Maintenance Assistance Program
- ▶ Transportation Demand Management
- ▶ Other FTA Discretionary Grants



Unified Grant Application (UGA) Process

Key Updates

- FY 26 5311 Admin allocations were emailed out by your assigned RGS. If you have not received the email, please follow up with your RGS.
- The UGA page has a lot of useful information refer to the screenshot below for a sample, i.e., [Unified Grant Application \(UGA\) Program Tutorial Phase I - Pre-application How-to-video](#)
- <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 Modified 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 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 [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 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.

- [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-to-video](#)
- 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 – June 11, 2024

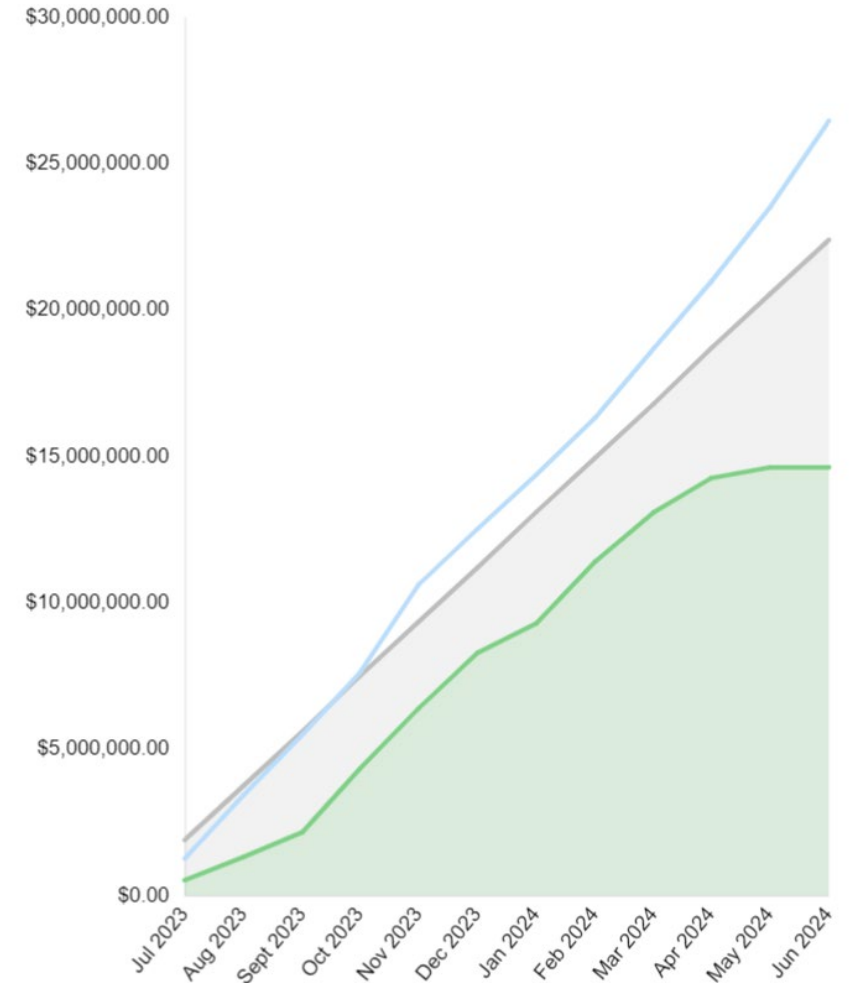
Overall ROAP Stats

Primary	Description	Amount	% Total Allocation
ROAP Allocation	1. Funds approved from legislators	\$18,678,339	
Carryover	2. Unspent funds from previous year	\$3,736,327	
Allocation + Carryover	3. Total of 1 + 2	\$22,414,666	
Transferred Out	4. Transferring ROAP funds to match eligible grant programs	\$1,055,388	6%
YTD Expenditures	5. Total approved expenses to date	\$18,867,629	101%
Total Balance	6. Remaining funds to date	\$2,491,649	11%

EDTAP, EMPL, RGP Stats

SFY2023	Net Allocation	Expenditures	% Expended	County Funds Used
EDTAP (Elderly & Disabled Transportation Assistance Program)	\$9,932,354	\$8,449,050	85%	\$1,135,719
EMPL (Employment Assistance Program)	\$2,606,348	\$2,586,286	99%	\$1,138,449
RGP (Rural General Public Program)	\$8,796,712	\$7,832,293	89%	\$1,591,005
Totals	\$21,335,414	\$18,867,629	88%	\$3,865,173

Actual vs Projected Expenditures



ROAP Update (Continued)

FY24 ROAP Analysis: Upcoming Reporting Dates

- 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.

Monthly 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.



the end of fiscal year is only a few weeks away and the final ROAP report is due on **July 30th**. Systems with late or missing reports need to begin now to catch up.

ROAP Update (Continued)

FY24 ROAP Analysis:

ROAP Reporting Update as of June 10, 2024

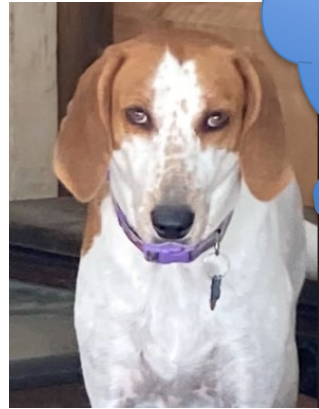
- July reports due September 15th – 3 reports not submitted
- August reports due October 15th – 4 reports not submitted
- September reports due November 15th – 4 reports not submitted
- October reports due December 15th – 4 reports not submitted
- November reports due January 15th – 3 reports not submitted
- December reports due February 15th – 3 reports not submitted
- January reports due March 15th – 5 reports not submitted
- February reports due April 15th – 6 reports not submitted
- April reports due June 15th
- May reports due July 15th
- June reports due July 30th

% Transit Systems Reported by Month

July 2023	92%
August 2023	95%
September 2023	95%
October 2023	95%
November 2023	97%
December 2023	96%
January 2024	94%
February 2024	94%
March 2024	87%
April 2024	53%
May 2024	11%
June 2024	0%

ROAP Update (Continued)

FY24 ROAP Closeout:



Sally says to get your reports in now before the program is reconciled

Looking ahead, end of fiscal year is only a few weeks 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 Update (Continued)

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>



Compliance Updates

2024 Compliance Reviews

CY23 5310 – ALL REVIEWS CLOSED

- 25 Total
- 25 Closed

CY23 5311

- 19 Total
- 13 Closed
- 5 In-Process
- 1 To Be Rescheduled

CY24 5311 – Round 1

- 9 Total
- 1 Closed
- 7 In-Process
- 1 To Be Rescheduled

CY24 5311 – Round 2

- 21 Notification Letters To Begin Going Out Next Week
- 2 Reschedules

<u>Calendar Year 2024</u>		
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)

Training Updates



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-zCbNftGeax4qTdKxhMtIGsOLhXyxNUMkE4OFFQRzdPUDRSTkVKVvc1TIBFUKVDSC4u>
- Transit Academy 101 Module 2 – In Person
 - Registration Closed
 - June 25-26

NCDOT-IMD Strategic Training Program

July Training

- OpStats for 5310/5311 Sub-recipients (Rural) Online
 - July 16 10:00 am – 11:00 am
 - July 18 2:00 pm – 3:00 pm
 - This training is to help you understand the reporting process for operating data
 - Opstats information is reported to the National Transit Database (NTD) and is used when by US Congress when considering funding allocations public transportation.
 - No pre-registration, links to classes will be emailed and available on training calendar
- OpStats for 5307 Recipients (Urban) Online
 - July 16 2:00 pm – 3:00 pm
 - July 18 10:00 am – 11:00 am
 - This training is to help you understand the reporting process for operating data
 - Opstats information is reported to the National Transit Database (NTD) and is used when by US Congress when considering funding allocations public transportation.
 - No pre-registration, links to classes will be emailed and available on training calendar

NCDOT-IMD Strategic Training Program

July Training

- Title VI of the Civil Rights Act of 1964 Online
 - July 24 2:00 pm – 5:00 pm
 - Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d et seq., was enacted as part of the landmark Civil Rights Act of 1964. It prohibits discrimination on the basis of race, color, and national origin in programs and activities receiving federal financial assistance. This online course covers Title VI requirements and Title VI Plans.
 - Pre-registration is required. Link will be emailed and posted on training calendar.
- No Transit Academy in July
 - Registration Closed

NCDOT-IMD Strategic Training Program

Other Training & Information

TRAINING OPPORTUNITIES LATER IN 2024

- Advanced Mobility Device Securement (AMDS) – NTI Training – In Person
 - September 17-18 and September 19-20
 - 2 Locations – TBD
 - Minimum Class size = 20
 - This workshop specifically addresses the special challenges of **oversized and powered wheelchairs and scooters**. The goal of this workshop is to present, demonstrate, and practice problem-solving skills for securing powered mobility devices.
 - Registration will be required.

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.

Special Project Updates



NCDOT IMD Partner Survey Overview

- Survey directed toward transit agencies, internal NCDOT units, local governments, and other community organizations to determine overall satisfaction with IMD programs and staff- results to be published at conclusion
- IMD Survey will be open June 12th- July 31st
- Survey takes 8-10 minutes to complete

Take Survey: <https://publicinput.com/imdpartnersurvey2024>




Scan for survey

Contact Database Update

- Annual Contact Update to confirm info is correct.
- You should receive an email that looks like this:
- Please complete all fields as accurately as you can.
- This will determine who receives emails and invites from us (multiple contact options).
- There are two Emergency Contacts here – Transit System and the County EOC – should be two different people.
- Accountable Executive is your County Manager or highest person your agency answers to.
- Facility Ownership and funding source questions are needed to be completed. Please research this if you do not know.

Note: This is completed annually, but if you have any changes throughout the year, please contact your RGS or any staff and we can help you update your info.

 **IMD Systems Contact Update Database**

Changes since 6/12/24, 11:57 AM

1 row changed

1 row added or updated (shown in yellow)

Row 146

Primary Column	
System/Organization Name	Your Transit Agency
Agency Designation	
Primary Contact Name (Director)	Timothy B Chambers Jr
Primary Contact Title (Director)	
Primary Contact Email (Director)	
Primary Contact Office Phone # (Director)	
Primary Contact Cell Phone # (Director)	
Director Status	

Calendar & Resource Updates



Transit Communication Hub

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
June 9	10	11	12 Transit System	13	14 April Monthly F	15
16	17	18 Fully Allocated	19	20	21 Census Bureau	22
23	24	25 Transit Academy 101 - Module 2	26	27	28 Monthly Claim	29
30	July 1	2	3	4 State Holiday - I	5	6
7	8	9	10 Transit System	11	12	13

Important Dates – Next 30 Days

Reporting Due:

- April Monthly ROAP Report – 06/14
- Monthly Claims – 06/28

Training:

- Fully Allocated Cost Model Training – 06/18
- Census Bureau Data Collection (#3) – 06/21
- Transit Academy 101 Mod 2 – 06/25-06/26

Transit Call:

- Next Transit Call is on 07/10/24

NCDOT Offices Closed:

- July 4th – Office Closed

IMD SmartSheet Links for Transit Systems

IMD SmartSheet Links for Transit Systems

This page will list commonly used SmartSheet Links will doing business with IMD. Please send any questions to Timothy Blair Chambers, Jr., Compliance & Procurement Branch Manager, Integrated Mobility Division, North Carolina Department of Transportation, 919-707-4693 (office) or tbchambers@ncdot.gov.

General/Surveys

- 📄 Provide feedback from Transit Calls and Ideas for training topics here.
- 📄 Transit Facility & Low Emission Fleet Transition Feasibility Survey (Open)
- 📄 STIP Amendment Request Database Form
- 📄 NC Department of Transportation Flex Request Form
- 🔗 **NCDOT IMD Partner Survey Link**

ROAP Reports

- 📄 ROAP Report Entry (Monthly)

Charter Reports

- 📄 Charter Report Quarterly Submission

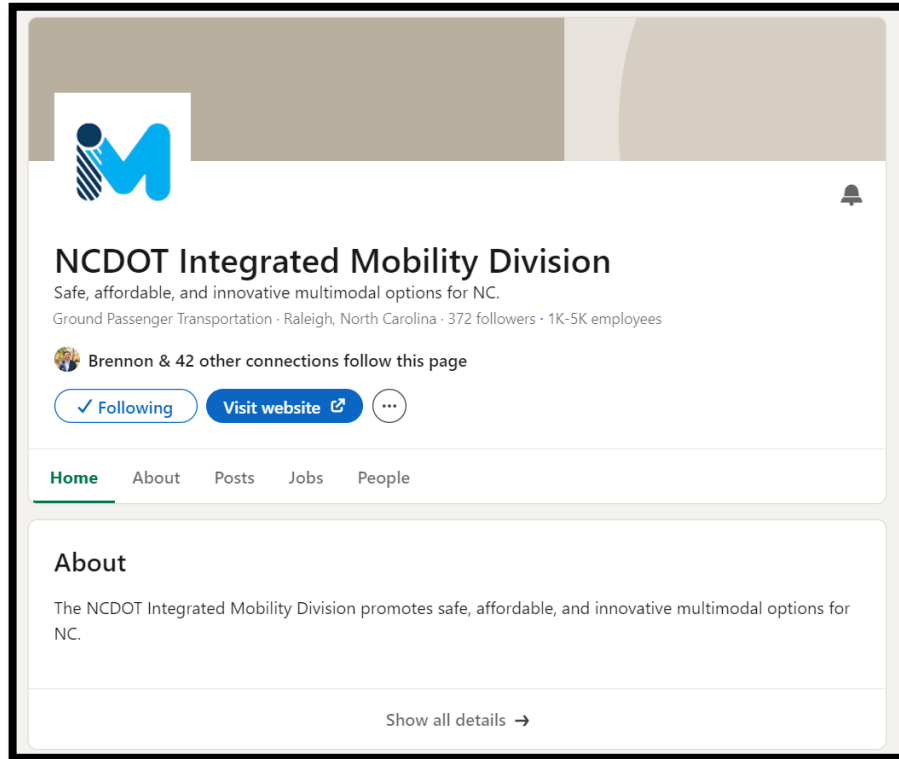
Transit Activity Reporting

- 📄 Accident/Incident Reporting (Active)

Vehicle Related Reporting

- 📄 Vehicle Disposition Tracking (Coming Soon)

Contact IMD



ncdot.gov/divisions/integrated-mobility

[@NCDOT_IMD](#) [NCDOT-IMD](#)

[@NCDOT](#) [ncdotcom](#) [NCDOTcommunications](#) [ncdotcom](#)

[@NCDOT](#) [NCDOT](#) [NCDOTcommunications](#) [View All Channels](#)

Questions?



Provide feedback and ideas for topics:

<https://app.smartsheet.com/b/form/f626a9fbbd7649e4ba4dd45b3bedbcfd>