



NORTH CAROLINA

Department of Transportation



Integrated Mobility Division Transit Systems Call

July 08, 2026

 ncdot.gov/divisions/integrated-mobility

 @NCDOT_IMD  NCDOT-IMD

 @NCDOT

 [ncdotcom](https://www.ncdot.com)

 [NCDOTcommunications](https://www.youtube.com/NCDOTcommunications)

 [ncdotcom](https://www.ncdot.com)

 @NCDOT

 NCDOT

 [NCDOTcommunications](https://www.youtube.com/NCDOTcommunications)

 View All Channels

AGENDA

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

Financial Update



Finance - Update

- Jocelyn Petatan-Valdez will be going out on leave this month until mid-October.
- Please reach out to Monique Frasier and Tanisha O'Keefe while Jocelyn is out on leave.
- Contact information:
 - Monique: msfrasier@ncdot.gov 919-707-4681
 - Tanisha: ttokeefe@ncdot.gov 919-707-4689

Finance – FY26 Due Dates

FY26 Grant Agreements

- ☐ Expenses incurred through June 30, 2026: Agencies have until **July 30th** to submit a claim for reimbursement for expenses incurred through and including June 30, 2026.
- ☐ Your Final Claim should cover all expenses through June 30th. You do not need to submit two separate claims for June.
- ☐ Please be sure to mark the **“Final Claim” check box**.

Finance – FY27 Upcoming Due Dates

FY27 Grant Agreements

July 1, 2026	FY27 Grant Fiscal Year Begins
July 15, 2026	FY26 – Q4 Program Income Report due
July 30, 2026	All final FY26 claims are due
August - September 2026	Federal Contracts sent to Subrecipients
Mid-August - December 2026	Project Closings
August 30, 2026	July claims are due

Finance – FY27 Contracts

- ❑ **REMINDER:** As you receive FY27 contracts from Finance, please review your contract for accuracy and **return to IMD within 30 days**. You will receive an email notification from DocuSign asking you to view your documents and sign.
- ❑ State contracts are being prioritized going out to subrecipients.
- ❑ Federal contracts will be going out as the FTA funds are awarded.



Finance –Naming Convention

- ☐ File names for a claim's supporting documentation must have the G-code in the file name.
- ☐ **Please attach each required document separately except for Salaries & Fringes (G121-189).**
- ☐ Please do not combine all required supporting documentation as one attachment.
- ☐ It is important that the naming convention be consistent across all claims and agencies to assist with efficient and effective reviews as well as future processing.

Finance – Example of File Names

 GRANTS			
▼ Attachments  Attachment  URL  With Template  Download Advanced			
Name	Type	Created By	Created On
Claim Checklist	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 9:08
Claim Cover Sheet	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:53
Cover Letter	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:53
DBE Form	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:53
Progress Report	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G121-G189	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G191	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G197	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G261	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G323	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G331	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:52
G333	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:51
G334	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:51
G452	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:51
G481	PDF File (Adobe Acrobat Exchange/Reader)	2MODELL	4/6/2026 8:51

Finance – Fares

- F511-General Public Fares is a contra-account that is used to document the fares collected but does not take away from your original approved budget amount.
- The budgeted amount on F511 cannot be moved to an expense line to increase the budgeted amount on another G-code.

A	B	C
	NORTH CAROLINA DEPARTMENT OF TRANSPORTATION	
	PUBLIC TRANSPORTATION DIVISION	
	APPROVED OPERATING BUDGET	
	PROJECT: 26-IMD-001	
	SPONSOR: INTEGRATED MOBILITY DIVISION	
	WBS: 51001.43.13.2	
	DEPARTMENT 5312 OPERATING	
<u>TITLE</u>	<u>DESCRIPTION</u>	<u>APPROVED BUDGET</u>
G313	Trans Clients/Oth.	\$150,000
F511	General Public Fares	(\$30,000)
	TOTAL OPERATING BUDGET	\$120,000

Finance – Reminders

- ☐ Ensure the agency contact information on the claim is correct.
- ☐ Ensure you are communicating with the claim reviewer.
- ☐ If claim corrections are needed, and those corrections have not been received within 3 business days, the claim will be returned.
- ☐ Claims with line items in overdraft will be returned and requested to be adjusted.
- ☐ If you are submitting a final claim, ensure you mark the claim as “Final”.
The final claim indicator selection is in EBS.

Finance – Reminders (Continued)

- ❑ Balance your budget via a Change Request, if needed, before submitting your final claim.
- ❑ A Claim and a Change Request for the same project cannot be in workflow at the same time as the system may lock and/or the balances do not update correctly.
- ❑ Only expenses incurred through June 30, 2026 are eligible on the FY26 project fiscal year budget. This applies to the projects with a Period of Performance end date of June 30, 2026.

Finance – Vehicle Claims

IMPORTANT REMINDER: vehicle reimbursement claims must also include the following:

- ☐ Inspection forms sent to Faye McCullen @ fmccullen@ncdot.gov
- ☐ Final vendor invoice
- ☐ **Signed MVR-1 Title application** showing **NCDOT-IMD as the first lien holder**.
- ☐ **MVR-1 Title application must be signed and notarized.**
- ☐ Original vehicle order form
- ☐ Copy of check for vehicle payment or Advance Payment form
- ☐ Lettering & logo invoice (if applicable)
- ☐ IMD procurement letter if your vehicle is not on a state contract

Finance – Helpful Links

[PUBLIC TRANSPORTATION](#) (Grants, Programs, Projects, Future Plans, Resources for NC Public Transportation Systems)

[REGIONAL CONTACT INFORMATION](#) (Regional Support Map)

[IMD SMARTSHEET LINKS FOR TRANSIT SYSTEMS](#) (General/Surveys, ROAP Reports, Charter Reports, Accident/Incident Reporting, Program Income Reporting)

[TRANSIT COMMUNICATION HUB](#) (Communications and Calendar)

[FINANCE](#) (Claim Requirements, Reporting Due Dates, Required Supplemental Documents, DocuSign Instructions, EBS Access, IDCR forms, Progress Report templates, Training Videos)

[COMPLIANCE REVIEW CYCLE](#)

[PROCUREMENT](#) (Forms, Contracts, RFPs, Policies, FAQs)

[REPORTS AND FORMS](#) (Forms, Contracts, RFPs, Policies, FAQs)

[IMD TRANSIT SYSTEM TRAINING HUB](#) (Links to previously held training sessions)

[2026 STATE MANAGEMENT PLAN](#)

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
Coastal Plains	Equila Drakeford	919-707-4680	ezdrakeford@ncdot.gov
Eastern Piedmont	Tanisha O'Keefe	919-707-4689	ttokeefe@ncdot.gov
Mountains	Monique Frasier	919-707-4681	msfrasier@ncdot.gov
Western Piedmont	Makiah Atwater	919-707-2600	msatwater@ncdot.gov



Grant Administration Updates

Staff Update

Mom's going to ★
spend some extra
time at home with
★ me for a bit!



Carolyn will be on a
leave of absence
from July 6th-October 12th.

I will be filling in while she is out.

If you need anything,
please feel free to contact me.

chamilton@ncdot.gov



FY 27 Unified Grant Application (UGA) Process

We are here! Watch for agreements!



Key Dates:

- The Contracting and Compliance Phase is July 1, 2026 – June 30, 2027
- Applications presented at the July Board of Transportation Meeting:

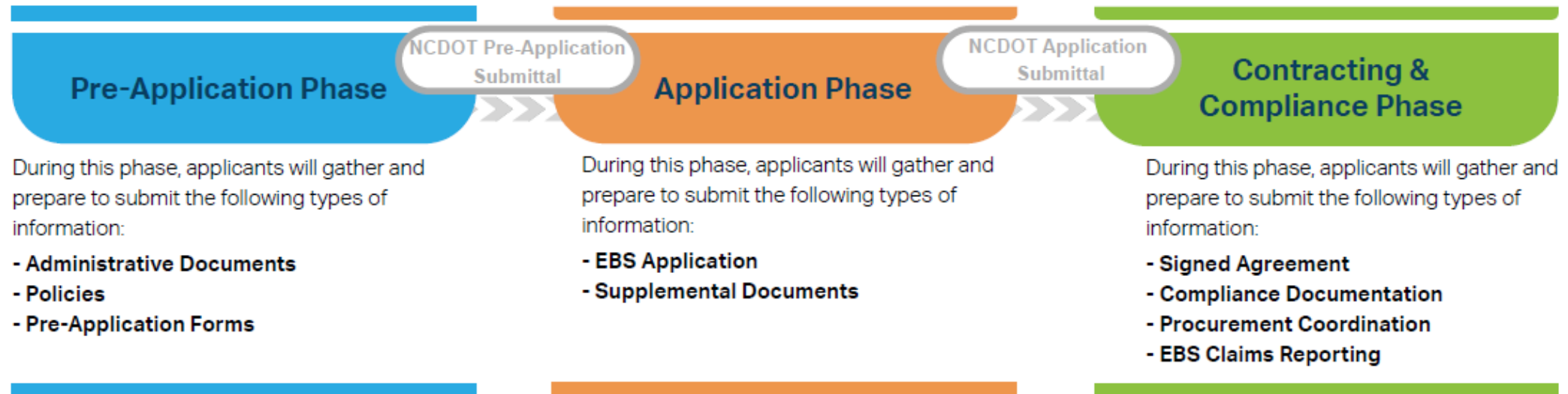
ConCPT
5311 - CMAQ
Urban State Match

5339 Discretionary
Combined Capital

FY 28 Unified Grant Application (UGA) Process

Pre-Registration is PAST DUE! If your RGS has requested additional or corrected documents, please return them in 10 days or less.

**We are here
Grants were released
in EBS July 1st!**



Key Dates:

- The FY28 Unified Grants Application (UGA) cycle is April 1 – October 2, 2026
- Pre-Application Phase is April 1 – June 2, 2026 – **Overdue!**
- Application Phase and EBS applications open July 1 – October 2, 2026 – **Open Now!**
- The Contracting and Compliance Phase is July 1, 2027 – June 30, 2028

UGA Page from IMD Connect Site

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, 2026:

Special Initiative ConCPT Funding Program

FY28 Public Hearing Notice

FY28 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 **FY28 Unified Grant Application (UGA) Overview** handout as a job-aid to guide subrecipients through the phased approach of the FY28 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.

- **FY28 UGA Pre-Application (Phase 1) Quick Reference Guide**
- **FY28 UGA Application (Phase 2) Quick Reference Guide**
- **FY28 UGA Application Contracting & Compliance (Phase 3) Quick Reference Guide**
- **Smartsheet Quick Reference Guide**

News & Updates

July 1, 2026 -

With the opening of FY28 Phase II, IMD has identified and published a list of vehicles that will be replaced using FY27 grant funds. Please refer to the list and do not submit replacement requests for any vehicles already included, as they have been approved for replacement under the FY27 grant. The list **can be found here**.

June 30, 2026 -

The North Carolina Department of Transportation Integrated Mobility Division (IMD) has announced the FY 2026 grant recipients of the Special Initiative ConCPT Program. Through this grant opportunity IMD has awarded over 8 million dollars in projects. The Special Initiative ConCPT Program provides operating and capital funding to support coordinated transit services among two or more transit agencies. By encouraging regional collaboration, the program helps maximize resources, improve operational efficiencies,

FY28 UGA Links

Tools you
can use

Vehicles Funded
w/ FY27 Grants



Fiscal Year 2028 Unified Grant Application (UGA) Process

Document Tips, Tricks, and Reminders

Applicant Profile Form

New Applicant Profile form will be used to collect data that was previously entered on multiple documents.

This should reduce duplicative work previously required across multiple grants.

The link was included in the Phase II opening announcement email and is also available in your SmartSheet applicant workspace.

Public Hearing Requirements

The Public Hearing must be held.

Public Hearing Notices are NOT required to be published in the Newspaper unless required by local regulations.

If notices are not required, systems are not required to submit a Public Hearing Notice or Public Hearing Affidavit.

Program Resolution & Local Share Certificate

Program Resolution must be signed by three **different** individuals –

- 1) Authorized Representative,
- 2) Certifying Official and
- 3) Notary

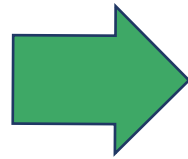
Local Share Certificate amounts must meet or exceed the required percentage and dollar amount for each grant. Certificates submitted with amounts below the required minimum will be returned.

ConCPT Grant

ConCPT Coordination Project

ConCPT funding is to enhance coordination between NCDOT IMD grantees (may include community colleges or universities).

Establish formal relationships to maximize resources, gain efficiencies, and improve access to public transportation for long-distance type fixed routes.

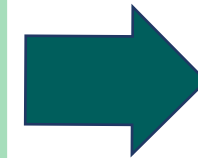


Approved

June - 13 applications approved by the BOT

July – Three applications submitted for approval by the BOT

August - Three additional projects are still under review and may be submitted to the BOT for approval in August



ConCPT Subrecipients

Please submit your MOU with each partner ASAP. They can be submitted to your RGS.

The finance team is working diligently on your agreements, don't let the MOUs hold you up!

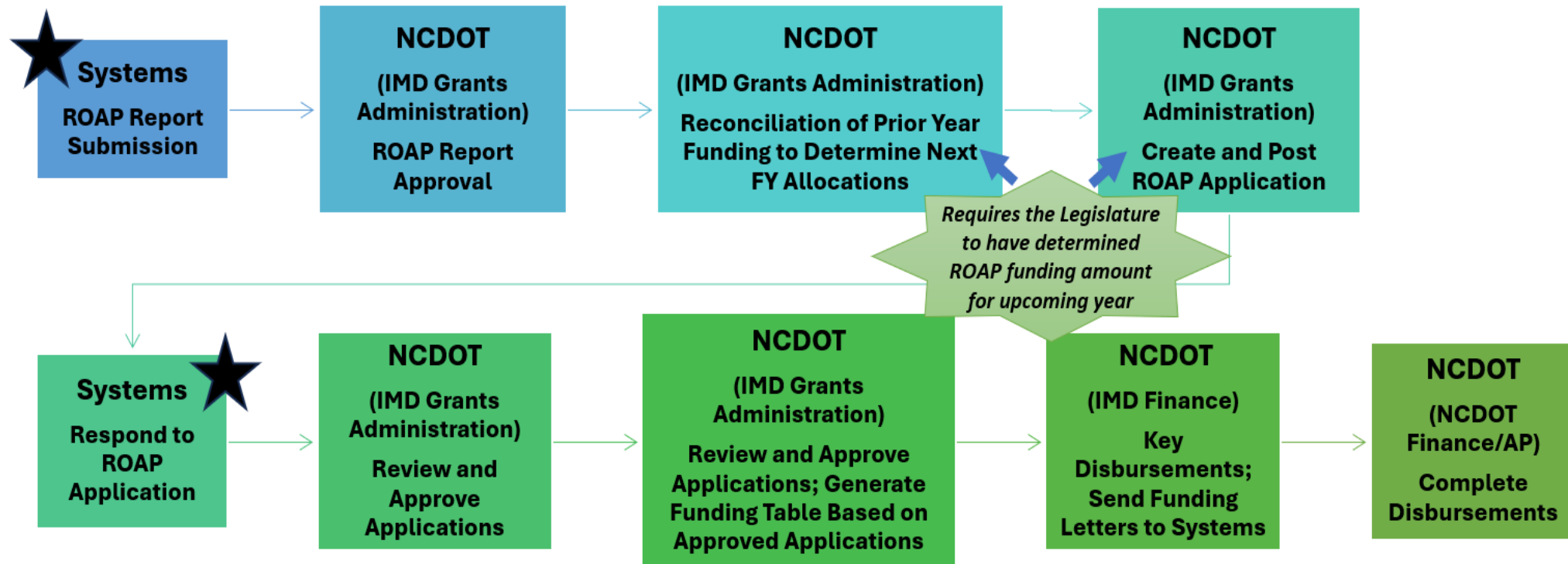


ROAP Updates



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

HOW CAN YOU HELP: We're counting on **YOU!** The faster you submit your final report, the sooner FY27 disbursements will be made!



ROAP

Monthly Overview

Overall Stats			
Primary	Description	Amount	% Total Allocation
ROAP Allocation	1. Funds approved from legislators	\$18,716,632	
Carryover	2. Unspent funds from previous year	\$1,449,625	
Allocation + Carryover	3. Total of 1 + 2	\$20,166,257	
Transferred Out	4. Transferring ROAP funds to match eligible grant programs	\$1,551,075	8%
YTD Expenditures	5. Total approved expenses to date	\$16,314,342	81%
Total Balance	6. Remaining funds to date	\$2,300,840	11%
Other Funds Used	7. Funds Used that exceed the transit systems' allocations	\$10,246,651	

Tranferred FROM:	Transferred TO:	Amount:
EMPL	EDTAP	\$439,395
	RGP	\$329,460
RGF	EDTAP	\$487,348
	EMPL	\$315,097
Total:		\$1,571,300

ROAP (EDTAP, EMPL, RGP) Stats							
SFY2026	Net Allocations	Expended on ROAP Services	Tranferred to Match Eligible Grants	Total ROAP Funds Expended	County Funds Expended	Total Expenditures	% Of ROAP Funds Expended
EDTAP (Elderly & Disabled Transportation Assistance Program)	\$9,399,625	\$7,808,367	\$706,290	\$8,514,657	\$3,224,293	\$11,738,950	91%
EMPL (Employment Assistance Program)	\$2,319,567	\$1,501,964	\$41,870	\$1,543,834	\$2,436,621	\$3,980,455	67%
RGF (Rural General Public Program)	\$8,447,065	\$5,452,936	\$802,915	\$6,255,851	\$4,585,737	\$10,841,588	74%
Totals	\$20,166,257	\$14,763,267	\$1,551,075	\$16,314,342	\$10,246,651	\$26,560,993	81%

ROAP Reporting

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

**We NEED them
ASAP!**



The earlier all ***June Reports*** are received, the earlier Grants Admin can begin working on ***FY27 distributions***.

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

- *Note:* A Transfer in your May report will not correct a negative balance in your April Report.

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.

ROAP Reporting

Sally better wake up because it's almost the end of the FY26 Grant Year and we still don't have all the February, March, April, May, or June Reports!!



	Transit System Approval	ET
00	☒	
51	☒	
33	☒	
29	☒	
40	☒	
93	☒	
00	☒	
02	☒	
37	☒	
21	☒	
91	☐	
91	☐	
91	☐	

Percent of Transit System ROAP Reports Submitted by Month

July	100%	January	100%
August	100%	February	99%
September	100%	March	97%
October	100%	April	97%
November	100%	May	84%
December	100%	June	12%

- Please ensure that you have given final approval on all reports approved by your RGS. If you go into your Program Balance Sheet, you can verify that final approval has been provided by looking for checks in the Transit System Approval box.



Procurement

Statewide Vehicle Invitation For Bid (IFB)

Traditional Vehicle Statewide Contract

- IFB posted on Monday
- Deadlines were extended
 - Questions by Venders – 07/20
 - IMD Response to Questions – 7/27
 - Deadline for bid – 08/10 @ 2pm

Current Contract

- We've extended the previous contract through October.
- These become expired when the new contract is executed.

Heavy-Duty/Large Bus Statewide Contract

- The IFB Creation is close to completion.



Existing State Contracts

NCDOT Agency Specific

- Scheduling Software (2/12/25-2/12/30)
- LTVs and Raised Roof Vans (4/18/23-7/31/26); new bid about to be advertised
- Upcoming bid for large buses

NC Dept of Administration

- STC 060C – Storefront Auto Parts
- *STC 2510A – Fleet Vehicles (minivans, service trucks, etc...)*
- STC 2517A – Tires and Tire Services
- *STC 2517B – Vehicle Bi-Fuel Propane Conversion Kits, Fuel Infrastructure, etc...*
- STC 5610A – Furniture

NC Dept of Information Technology

- *Contract #204B – Mobile Ruggedized Computers (Tablets)*
- Contract #204D – Printers & Peripherals
- *Contract #725G – Radios (Two-Way), Communications Equipment*
- Contract #208K – ESRI Geographical Information Systems (GIS) Software

Please reach out to IMD Procurement before issuing purchase orders utilizing these contracts if the purchase exceeds \$15,000. Procurement compliance will still need to be documented if utilizing FTA/NCDOT funding assistance.

North Carolina Department of Administration (DOA)

Statewide Contracts

The following statewide contracts administered by NCDOA may be beneficial to Transit Agencies needing to procure for these items. These are just some of the options available.

NCDOA Statewide Term Contracts

Note: Please contact us if you plan to utilize these contracts as there may be some additional language that needs to be added to make these eligible for using Fedeeral Funding.

STC 060C – Storefront Auto Parts

STC 1412A – Office Paper

STC 1510B – Fuels

STC 193A – Drug Testing Products & Services

STC 2410A – Vehicle Lifts and Garage Associate Equipment

STC 2510A – Fleet Vehicles

STC 2517A – Tires and Tire Services

STC 2517B – Vehicle Dedicated & Bi-Fuel Propane Conversion Kits, Accessories, Fuel Infrastructure and Propane (Autogas)

STC 2613A – Electric Vehicle Charging Station Equipment, Accessories, Installation and Infrastructure

STC 2711A – Professional Grade Tools and Diagnostic Equipment

STC 405A – Propane

STC 4217A – Automated External Defibrillators (AEDS) & Accessories

STC 4412A – Office Supplies

STC 5610A – Furniture

North Carolina Department of Information (DIT)

Statewide Contracts

The following statewide contracts administered by NCDIT may be beneficial to Transit Agencies needing to procure for these items or services. These are just some of the options available.

NCDIT Statewide Contracts

Note: Please contact us if you plan to utilize these contracts as there may be some additional language that needs to be added to make these eligible for using Fedeeral Funding.

204N – Apple Computer Equipment, Peripherals & Services

915A – Cellular Telephone Service & Equipment

208K – ESRI Geographical Information System (GIS) Software

204A – Microcomputers, Peripherals and Related Services

204B – Mobile Ruggedized Computers (Tablets)

204D – Printers & Peripherals

204X – IT Infrastructure Solutions

725G – Radios (Two-Way), Communications Equipment

Procurement Updates

IMD Triennial Prep

- **Review period FY24-FY26**
 - An internal audit was performed to review procurement files for projects awarded between FY24-F26
 - In accordance with FTA Procurement guidance, some procurement files will need to be updated in preparation for next year's FTA Triennial Review
 - A list of requested documents will be emailed out to systems over the next few weeks
 - **Please return as many applicable documents as possible by Wednesday August 19th**
- **IMD Procurement Trainings**
 - IMD will be working on several pre-recorded training videos this Summer to address commonly asked procurement questions; topics include:
 - Vehicle ordering process
 - Sealed bid process (for procurements over \$90,000)
 - IMD-specific ProcurementPRO training

Please reach out to Chris Dodson (cbdodson@ncdot.gov; 919-707-4696) with any questions or concerns

Training Updates



OPSTATS Trainings

- Every public transportation system in North Carolina is required to complete and submit an Operating Statistics (OpStats) report. This report captures service, financial, safety, and other transit-related data each fiscal year. For many systems, this data is then submitted to the National Transit Database (NTD) to satisfy the State's Federal reporting requirements. For transit systems that report directly to NTD, there should be a direct correlation between the data reported on the OpStats report and the data reported to NTD.
- Directors, Finance Staff or others responsible for OpStats Report
- Dates/Times/Location
 - OpStats Training - Rural 07/16/26 10:00 a.m. - 11:00 a.m. [OpStats - Rural 7-16-26](#)
 - OpStats Training - Urban 07/16/26 2:00 p.m. - 3:00 p.m. [OpStats - Urban 7-16-26](#)
 - OpStats Training - Urban 07/21/26 10:00 a.m. - 11:00 a.m. [OpStats - Urban 7-21-26](#)
 - OpStats Training – Rural 07/21/26 2:00 p.m. - 3:00 p.m. [OpStats - Rural 7-21-26](#)
- This webinar is a great opportunity to learn more about the new data collection form, the data being collected, and why we are collecting this data. This is also an opportunity to address any questions you have about the form itself and any of the data we are asking for.

CUTR - Enhancing Transit Safety Through De-Escalation and Assault Prevention in NC

- Enhancing Transit Safety Through De-Escalation and Assault Prevention in North Carolina
- This one-hour webinar provides an engaging overview of safety strategies, de-escalation techniques, and assault prevention for North Carolina's transit systems. Attendees will learn how the state is addressing transit safety issues and how these strategies align with the best national practices. This session aims to set the stage for a full-day in-person training that will explore these topics in depth and provide practical tools to enhance passenger and operator safety. Please join us to gain insights and prepare for the upcoming hands-on training sessions.
- Target Audience: Safety Managers, Trainers, Drivers/Operators
- July 15 - 1:00 pm – 3:00 pm [Enhancing Transit Safety through De-Escalation & Assault Prevention](#)

Upcoming Training Opportunities

- Passenger Assistance Techniques (PAT) Training
 - Class 1 - 08/31-09/01
 - Class 2 – 09/03-09/04
 - Locations: TBD
- Drug & Alcohol Program Manager (DAPM)
 - DAPM only (In-Person)
 - November 16-20
 - 2 Class Locations
 - Locations: TBD (Contact Kim Angel if you have a location that can accommodate training)
 - Reasonable Suspicion Determination will be offered as a webinar (date & time pending)



Calendar & Resource Updates

Transit Communication Hub

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
July 5	6	7	8 2026 Board of Transit System	9	10	11
12	13	14	15 Annual Facility Charter Report Program Incon Training Repor Transportation	16 OpStats Trainir OpStats Trainir	17	18
19	20	21 OpStats Trainir OpStats Trainir	22 NCPTA Execut	23	24	25
26	27	28	29	30 Quarterly Clain Final Year-End June Monthly I	31	August 1
2	3	4 TA101 MODULE 3 - Planning & Comj	5 2026 Board of Transportation	6	7	8

Important Dates – Next 30 Days

Reporting Due:

- *Annual Facility Maintenance Checklist – 07/15
- Charter Report– 07/15
- Program Income– 07/15
- Training Report– 07/15
- TDM Claims– 07/15
- Vehicle & Lift Data– 07/15
- Quarterly Claims– 07/30
- Final Year-end Claims – 07/30
- June ROAP Report – 07/15
- VUD Collection Week – 08/10 through 08/16

**For Federally-Funded Facilities only*

Meetings:

- **Next Transit Call** is on 08/12

Training:

- Enhancing Transit Safety Through De-Escalation and Assault Prevention in NC – 07/15
- OPSTATS Training – 07/16 & 07/21
- Transit Academy 101 – Module 3 – 08/04 & 08/05

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>