



NORTH CAROLINA

Department of Transportation



Integrated Mobility Division Transit Systems Call

July 09, 2025

ncdot.gov/divisions/integrated-mobility

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AGENDA

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

Finance Updates



Finance Updates

**21 more days - final
claim deadline**



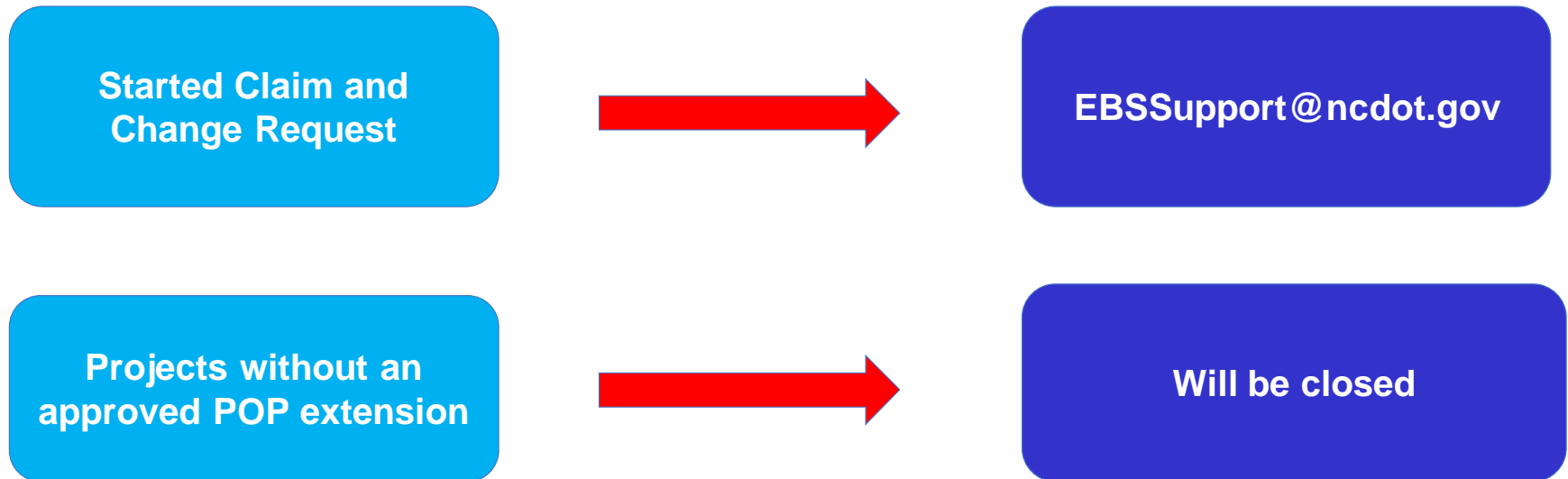
July 30, 2025

**Budgets must be
balanced before
submitting final claim**



July 30, 2025

Finance Updates




Please select the final indicator on all final claims.

Finance Updates

- IMD will no longer accept claims on projects after **July 30, 2025**, unless the project has received a signed approved period of performance extension by Beth Gay.

Finance Updates



**Purchases over
\$10K, requires
ProcurementPro**



**Requires signed
procurement
approval letter by
Procurement
Officer, Chris
Dodson to be
attached to claim**

Finance Updates

- Program Income reports are due to finance by July 15, 2025.



- hutterstock.com/image-vector/q4-fourth-quarter-business-report-target-648883393

Finance Updates

Finance has sent out the following contract packages via DocuSign

**Traveler's
Aid**

**Advanced
Technology**

**Rural State
Operating**

**Urban State
Match**

Apprentice/Intern

RideShare

Finance Updates

**5310
Operating/
Capital**

**5311 Admin/
Operating**

**5311 Capital/
ADTAP**

**5311
Intercity**

5339 Capital

**5303
Metropolitan
Planning**

Finance Updates

- If your agency isn't using DocuSign, please print the contract and route for signatures. Once completed, email a copy of the PDF file to Finance. You must return the entire package and not just the three signature pages.

Finance Updates

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.

News & Updates

Training Links

- [Claims Training](#)
- [Entering a DBE Payment Training](#)
- [Entering a Change Request Training](#)

Supplemental Documents

CHANGE REQUESTS

[Salary and Wage Detail Revision Form](#)



CLAIMS

[Claim Checklist](#)



[Claim Cover Sheet](#)



[DBE Form](#)

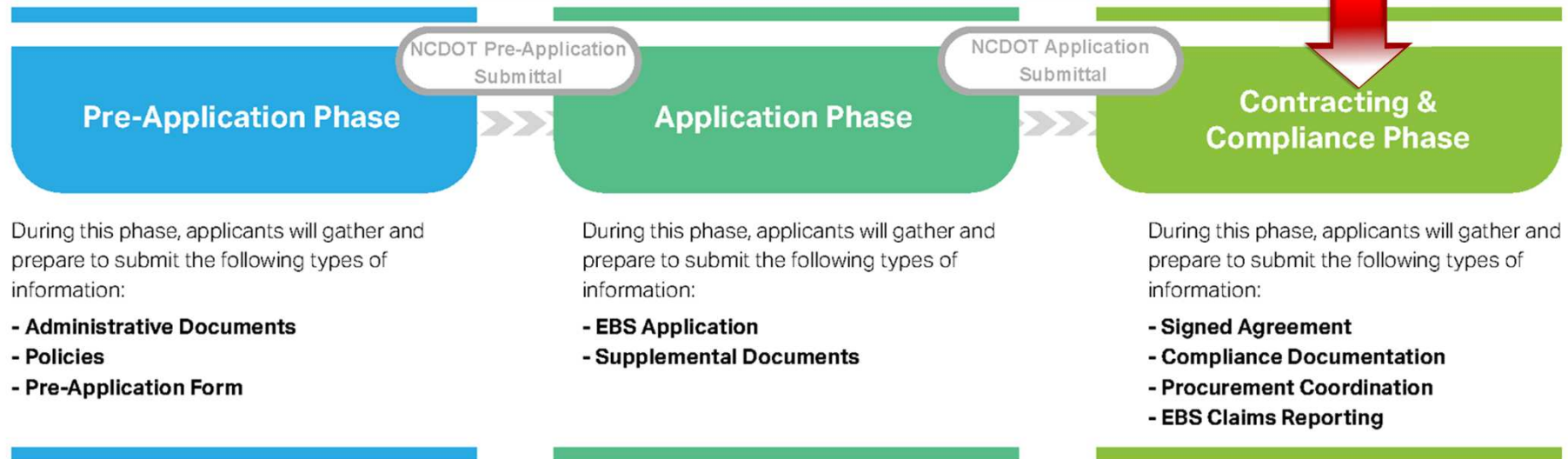


[Supporting Documentation Document](#)



Grant Administration Updates

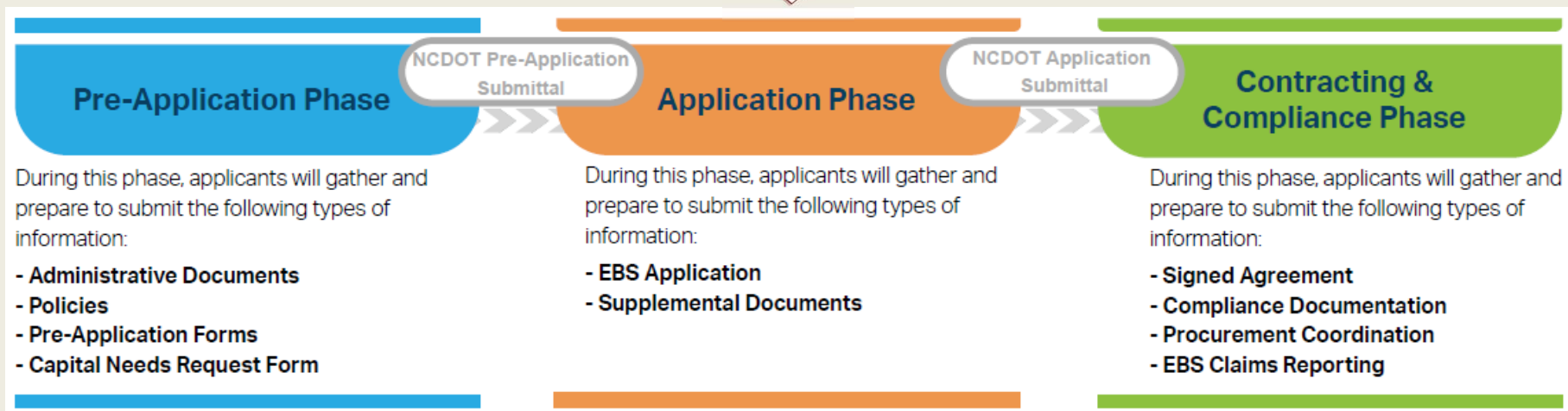
FY 26 Unified Grant Application (UGA) Process



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 - **Closed**
- The Application Phase is July 1 – October 3 – **EBS Applications Open**
- 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:

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.

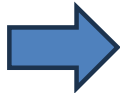
UGA Roadmap - This document provides a quick snapshot of the UGA tools and resources. This roadmap is especially helpful for those who are new to the UGA process.

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

- FY27 5311 funding allocations have been sent out by the RGSs.
- Rural State Operating allocations for eligible systems are under development.
- Certs and Assurances are due back no later than Thursday, August 21st. Attach them to your FY26 SmartSheet workspace on the Certs and Assurances line in Phase 3.
- Eligible replacement vehicles were loaded into the Combined Capital application prior to opening in EBS. If any discrepancies are found notify your RGS so this can be looked into by Jonah Freedman and our partners at EBS.
- Regional Grant Specialists are available to answer questions as you proceed through the application process.



ROAP Overview – July 8, 2025

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	\$991,529	5%
YTD Expenditures	5. Total approved expenses to date	\$17,200,314	92%
Total Balance	6. Remaining funds to date	\$2,908,504	14%
County Funds Used	7. County Funds Used that exceeds the transit systems' allocations	\$8,430,444	

EDTAP, EMPL, RGP Stats

SFY2025	Net Allocation	Expenditures	% Expended	County Funds Used
EDTAP (Elderly & Disabled Transportation Assistance Program)	\$9,875,501	\$11,065,590	112%	\$2,389,538
EMPL (Employment Assistance Program)	\$2,206,817	\$3,772,716	171%	\$2,045,702
RGP (Rural General Public Program)	\$8,026,500	\$10,792,452	134%	\$3,995,205
Totals	\$20,108,818	\$25,630,759	127%	\$8,430,444

% Transit Systems Reported by Month

July 2024	99%
August 2024	99%
September 2024	99%
October 2024	99%
November 2024	98%
December 2024	99%
January 2025	98%
February 2025	96%
March 2025	94%
April 2025	94%
May 2025	79%
June 2025	12%

The percentages do not include unapproved ROAP reports.

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)
- **May's** report was due **June 30, 2025**
- **June's report is due July 30, 2025**
- Any outstanding report confirmations and/or corrections are due within 4 days of receiving the ROAP Report e-mail

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 and SMAP Discussions



The NCPTA advisory board and IMD continue to meet regularly and have discussed updates to the FY26 ROAP program and began a discussion of the SMAP program to consider an update of the program.

No SMAP updates to report for July call.



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
- Once the program reconciliation begins changes will not occur and delay the process to finalize FY25 and begin FY26,
- 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 to continue providing trips**

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 ****currently ~40 systems are greater than 5% of unspent funds**



Procurement

Procurement Project Status Report

Project	May 2025	June 2025	July 2025	Aug 2025	Sept 2025	Oct 2025	Nov 2025	Dec 2025	Comments
Statewide Routing Software – Tech RFP (Contract Active Feb 2025)			CTS Demo						
									
Statewide Camera Contract	RFI Posted	RFI Deadline (06/26)	Determine RFP path	Work with DIT or Purchasing to create RFP	Post RFP				
Statewide Vehicle Contract (2026-2028)		Specs Survey Completed	Survey results and final agency feedback	Specs delivered to NCDOT Purchasing		Post RFP (Tentative)			

Transit Software Solution

- Originally NCDOT RFP 12008772-CM Transit Software Solution was awarded to the following 3 vendors:
 - RideCo US, Inc.;
 - Spare Labs, Inc.; and
 - Via Mobility, LLC
- As of May 2025^{1pm}, Tripmaster by CTS Software has also been awarded this contract
 - As vendor demonstrations took place in March/April for the initial 3 awarded vendors, we are now organizing a demonstration to be administered by CTS Tripmaster scheduled for Wednesday July 16th @ 11:00am
 - This session will include a demonstration by the vendor, time for questions and answers, instructions from both procurement and grants on how to access the contracts and how to fund



Vehicle Procurement Workshops

- We received excellent feedback on the survey, thank you!
- Interest in EVs, microtransit vehicles, as well as advanced safety features for all vehicles.
- Virtual workshops will dive further into the needs for vehicle contracts.
- Two sessions: one for all vehicles and options, and one for large bus procurement contracts.
- The goal is to gain a greater understanding from agencies that will help drive specification development.



All Vehicles and
Options
July 29th, 1:00 PM

Large Bus
Workshop
July 31st, 1:00 PM

Training Updates



NCDOT-IMD Strategic Training Program

July 2025 Training Opportunities

- **Transit Academy 101: Introduction to Transit Operations and Service Evaluation**
 - July 21-23, 2025
 - Union Station Winston-Salem, NC
 - In-Person Training - Registration Closed
- **Effective Documentation Strategies**
 - July 31, 2025
 - 10:00 am – 12:00 pm
 - Registration Link: [Effective Documentation Strategies](#)
 - Description:
 - Although it is impossible to eliminate liability and risk completely, we can reduce exposure by the timely and accurate submission of documentation when we encounter safety concerns. Proper documentation is not only critical in reducing liability, but is also an extremely vital form of communication
 - Accurate and timely documentation will create an environment that encourages open communication and unifies your team's efforts in reaching your organization's goals of providing safe and reliable transportation to the customers you serve. • Liability awareness • Documentation as a form of care • Common documentation pitfalls • Partnering for solutions • Documentation as a form of communication
 - **Virtual - Please Register Each Participant Individually**

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NCDOT-IMD Strategic Training Program

August 2025 – Planned Training

- **OpStats (Rural & Small Urban)** – Virtual - 8/12/25
- **OpStats (Urban)** - Virtual - 8/12/25
- **Transit Academy 101 (Registration Closed)** – In Person – 8/19/25 – 8/20/25
- **Train the Trainer: Effectively Managing Riders with Alzheimer's and Dementia**
 - Training Information and Registration will be available soon
 - The Target Audience is Staff responsible for Driver training
- **In-Person – Locations will be as follows:**
 - Onslow Co (Jacksonville): 8/7/25
 - Johnston Co (Selma): August 26 or 28 (TBD)
 - Iredell Co (Statesville): 8/13
 - Buncombe Co (Asheville): 8/27
- **Class times will be announced but are tentatively 10:00 am – 3:00pm**

EAM Updates

- Upcoming EAM Trainings
 - Coastal Carolina Community College: August 7th
 - Raleigh: TBD
 - Asheville: August 20th
 - Statesville: August 27th
 - Additional Dates?
- Software Update
 - The test site has been updated to a new version.
 - We are reviewing the update, please help us test it out.
 - We expect to transition the live site to the new version in early September

North Carolina Transportation Leadership Development Program

How can your transportation
organization

Grow

if you don't?

Public Transportation Group
An activity of the Institute for Transportation Research
and Education at North Carolina State University

How you will grow...

- Study at your own pace, using an interactive guidebook
- Apply what you learn to your everyday work and your plans for the future
- Develop your own leadership style
- Collaborate with the workshop team to develop and complete a project to improve transportation services
- Develop your own project to address a pertinent issue within your own organization
- Attend two workshops with others in locations across the state
- Work with a sponsor from your organization to ensure the course is relevant to your own work
- Work with a facilitator/advocate who will discuss the ideas and concepts in the workbook with you
- Earn 10 CEUs in recognition of your accomplishments in the NC-TLDP

- Taught for over 25 years
- Over 300 of your peers have gone through the program

Fall 2025 Schedule

Registration Closes: August 15

Start: August 18

Seminar 1: September 17-19

Seminar 2: October 8-10

End: November 21

Cost

Rural: \$950

Urban: \$2,300

Register

<https://itre.ncsu.edu/focus/transit/transportation-leadership-development-program-tldp/>



Jeremy Scott
jscott@ncsu.edu
(919) 515-8624

Calendar & Resource Updates



Transit Communication Hub

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
July 6	7	8	9 Transit System	10	11	12
13	14	15 Charter Report Annual Facility Transit Asset M Training Repor Vehicle and Lif	16 Transit Softwa	17 Multimodal Up OPSTATS Train OPSTATS Train	18	19
20	21 Transit Academy 101 - Module 2 and Module 3 -Winston-	22	23 Intelligent Doc	24	25	26
27	28	29 2026 Statewid	30 Quarterly Claim Final Year-End June Monthly I	31 2026 Statewid Effective Docu	August 1	2
3	4	5	6 Intelligent Doc	7	8	9

Important Dates – Next 30 Days

Reporting Due:

- Charter Reports (Apr-Jun) – 07/15/2025
- Annual Facility Maintenance Checklist – 07/15/2025
- TAM – 07/15/2025
- Training Reports – 07/15/2025
- EAM – 07/15/2025
- Program Income (Apr-Jun) – 07/15/2025
- TDM Claims – 07/15/2025
- Quarterly Claims Due – 07/30/2025
- Final Year-End Claims Due – 07/30/2025
- ROAP Report (June) – 07/30/2025

Meetings:

- Next Transit Call is on 08/13/2025
- CTS Demo – 07/16/2025
- Multi Modal Updates – 07/17/2025
- Spec Discussions – 07/29/2025 & 07/31/2025

Training:

- Opstats – 07/17/2025
- IDP Training – 07/23/2025 & 08/06/2025
- Effective Documentation – 07/31/2025

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>