



NORTH CAROLINA

Department of Transportation



Integrated Mobility Division Transit Systems Call

August 9, 2023

AGENDA

- Finance Updates
- Grant Administration Updates
- Compliance & Procurement Updates
- Planning & Programming Updates
- Benefits of Transit
- OPSTATS training reminders
- Questions

Finance Updates



Finance Updates

- Finance will send out the executed agreements for the 5303, 5311 and 5339 projects soon. There is an ongoing delay with our accounting unit loading these budgets into our accounting system.
- If you received approval to purchase a vehicle in your FY24 budget, we ask that you place your order for those vehicles asap once you receive the executed agreement.
 - Vendors are held firm to contract pricing from 4/18/23 until 4/18/24, but please make sure to place orders ASAP so that your orders can be processed before a requested price increase comes from the vendors
- Chris Dodson will send out the order forms to each entity as the agreements are approved in EBS.
 - FY24 Order forms will also be posted to the IMD Procurement page prior to the end of August

Finance Updates

- If you haven't submitted your final claims for projects that ended June 30th, please do so immediately. Finance is expected to begin closing projects this month.
- Please select the final indicator on all final claims
- When you receive your contract in DocuSign, please read the instructions on the first page. The instructions will guide you how to complete and how to reassign to others
- The authorized official is the only person authorized to sign the contract.
- The authorized official cannot attest their own signature
- If the authorize official changes, you must complete a new delegation of authority form and send to Faye McCullen at fmccullen@ncdot.gov

ROAP Update as of August 9, 2023

Overall ROAP Stats

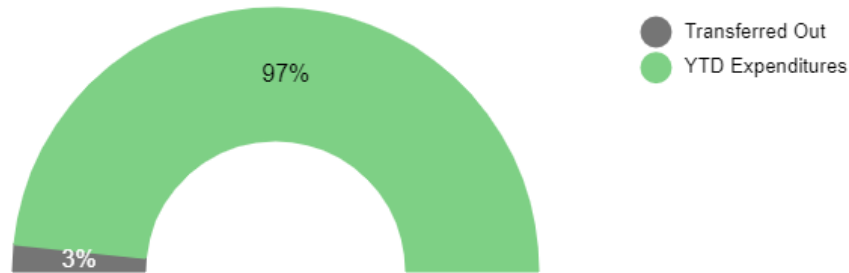
Primary	Amount	% Total Allocation
ROAP Allocation	\$18,690,029	
Carryover	\$3,629,744	
Allocation + Carryover	\$22,319,773	
Transferred Out	\$913,752	5%
YTD Expenditures	\$26,764,991	143%
Total Balance	-\$5,358,970	-29%

EDTAP, EMPL, RGP Stats

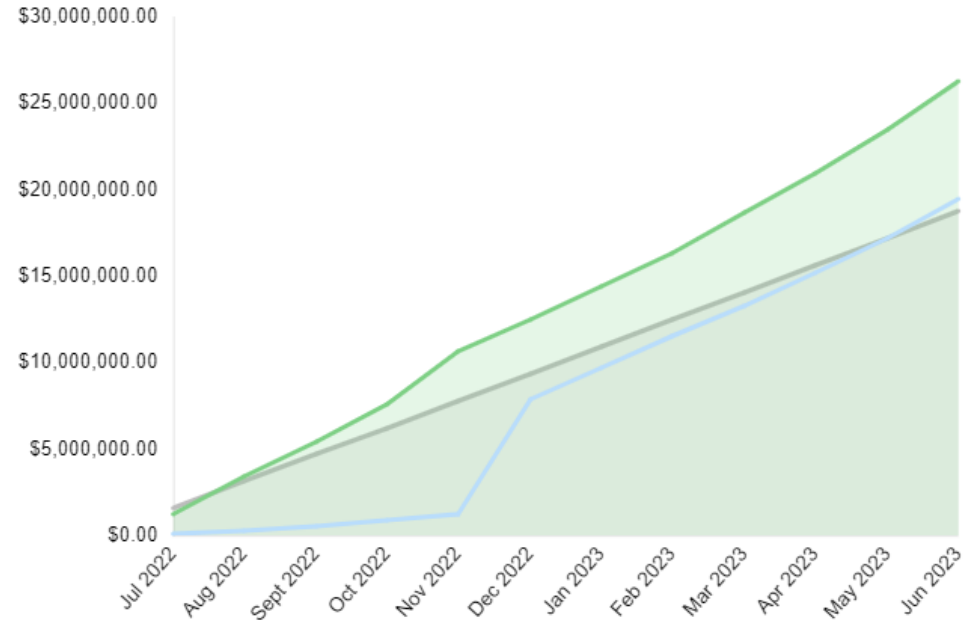
SFY2023	Net Allocation	Expenditures	% Expended	County Funds Used
EDTAP	\$10,295,154	\$13,294,339	129%	\$4,646,100
EMPL	\$2,507,497	\$4,070,974	162%	\$2,406,215
RGP	\$8,568,982	\$9,399,678	110%	\$2,457,467
Totals	\$21,371,633	\$26,764,991	125%	\$9,509,781

Net Allocation includes Carryover Amounts and Transfers.

Expenditure Progress



Actual vs Projected Expenditures



● Actual FY22 ● Actual FY23 ● Projected

*The transit systems had the option to roll up July - December reports into the December data for SFY2022.

ROAP Update Continued

- ROAP Reporting Update:
 - September 2022 report due November 15th – **2 Overdue**
 - October 2022 report due December 15th – **1 Overdue**
 - May 2023 ROAP report is July 15th – **1 Overdue**
 - June 2023 ROAP report is due on or before July 31st – **2 Overdue**
- The end of year reconciliation of ROAP reports is currently in progress,
 - RGSs continue to reach out to systems who have not submitted reports through the fiscal year or who have not corrected or revised a ROAP report and resubmitted them.
 - These actions are necessary to complete the reconciliation at the end of the fiscal year
 - The completed reconciliation of FY23 ROAP funds impacts the amount of unspent funds available and the disbursement of ROAP funds for FY24

ROAP Update Continued

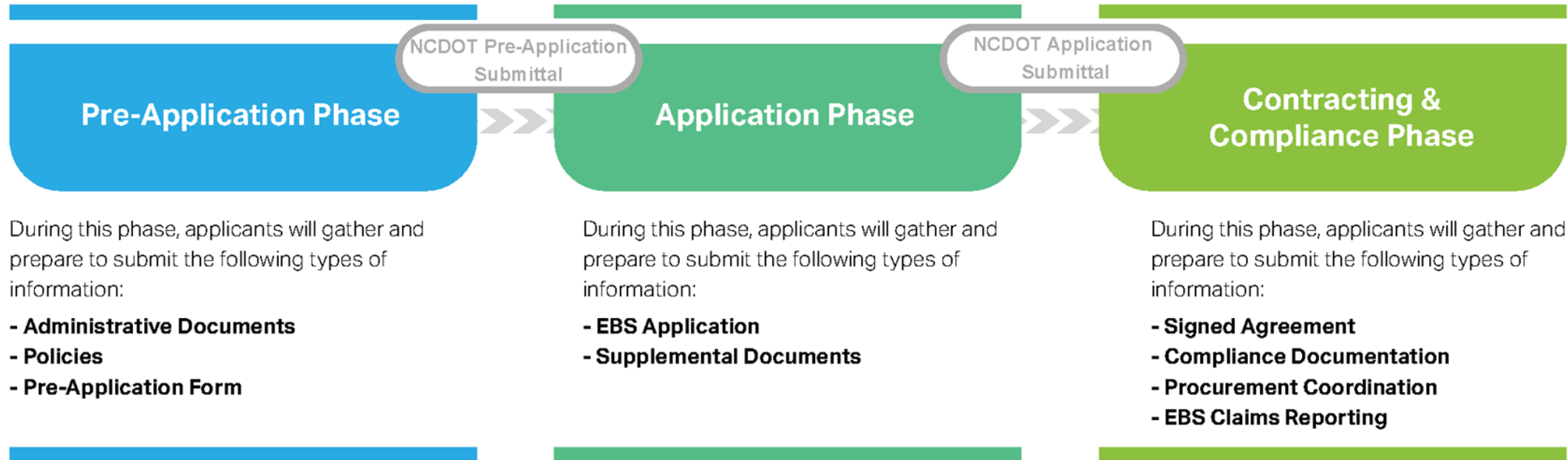
- The FY24 ROAP monthly report form has been updated and is available for systems to use who want to submit their FY24 July report before September 15th.
 - Updates to the report form include reporting fares separately from the EDTAP, EMPL and RGP expenses
 - In each funding category record the expense minus fares.
 - In each funding category a new dropdown box has been added to select Yes or No for fares and if Yes, a box opens to record the amount of fares
 - Fare amounts do not calculate from your ROAP allocation amounts but calculate for your record or auditing purposes
- The link to the FY24 SmartSheet is:

<https://app.smartsheet.com/b/form/03221c3f6b9645a89b45ab176f03680b>
- The FY24 ROAP application will be posted later this summer, notification will be made when it is available.

Grant Administration



FY 25 Unified Grant Application (UGA) Process



- The Combined Capital Application has been reopened.
- Completed Grant Applications, including the Combined Capital application, are due in EBS – Friday, **October 6, 2023**
- Quick Reference Guides available on UGA webpage:
<https://connect.ncdot.gov/business/Transit/Pages/Unified-Grant-Application.aspx>
- For any technical assistance, reach out to your RGS

Completed Grant Applications Deadline Friday, October 6

- ▶ Capital Purchase of Service
- ▶ Section 5310
- ▶ Section 5311
- ▶ Urban Advanced Technology
- ▶ Urban Strategic Transportation Investments (STI)
- ▶ Rural STI
- ▶ Combined Capital
- ▶ 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 2023

- ▶ 5303 Planning (Fall 2023)
- ▶ Rural Operating Assistance Program (Late Summer)
- ▶ State Maintenance Assistance Program (Late Summer)
- ▶ Transportation Demand Management (TBD)
- ▶ Other FTA Discretionary Grants (As Available)



Other Updates and Reminders

- ▶ If you are planning to apply for Indirect Costs on your FY25 application, be sure to include **G481 (Central Services)** Remember to upload your Indirect Cost documentation to your application no later than October 6th.
- ▶ [IDCR Forms](#)
- ▶ For FY24 if you did not include indirect costs in your application this G code can not be added.
- ▶ For assistance with your claims and change requests, please contact Elizabeth Peak at (904) 813-3283 or ext-eapeak@ncdot.gov.



Compliance & Training Updates

2023 Compliance Reviews

- In 2023, we will cover 51 Compliance Reviews
 - 29 5310 Non-Profit Reviews (have begun)
 - 21 5311 Transit System Reviews (Will begin in the Fall-October)

Compliance Reviews

Compliance Reviews

[Home](#) ▶ [Connect NCDOT](#) ▶ [Doing Business](#) ▶ [Public Trans](#) ▶ [Compliance Reviews](#)

Compliance Review Cycles

Compliance Reviews are conducted at least every three years or sooner depending on various factors. Below is a list of transit systems that will have Compliance Reviews within the year at the top.

If you would like to prepare for your review early or learn what is covered within these reviews, please click on this document:

[Compliance Review Workbook](#)

(Workbook is reviewed and changes made on a yearly basis)

Calendar Year 2023

Alexander County (DSS) (Non-Profit)	Avery Association of Exceptional Youth (Non-Profit)	Catawba County (Non-Profit)
Central Carolina Community College (Lee County) (Non-Profit)	Community & Senior Services of Johnston County (Non-Profit)	Granville County Senior Center (Non-Profit)
Johnston County Industries (JCI) (Non-Profit)	MONARCH - Currituck County (Non-Profit)	MONARCH - Pasquotank County (Non-Profit)
MONARCH - Columbus County (Non-Profit)	County of Davidson, Senior Services (Non-Profit)	The Life Center (Non-Profit)
The Workshop of Davidson (Non-Profit)	Rutherford County Life Services (Non-Profit)	Anson County Council on Aging (Non-Profit)
Chatham County Council on Aging (Non-Profit)	Rutherford County Senior Center (Non-Profit)	Graham County-Senior Center (Non-Profit)
Hyde Health Dept (Non-Profit)	MONARCH - Stanly County (Non-Profit)	Kerr Tar COG (Non-Profit)

Business Guide Updates (August 2023)

Section	Name	Change Description
00	Business Guide	Added drop down capability for each release and change notes for August 2023 release.
00	Grant Descriptions (New)	Added description and overviews of grant types.
00	Transportation Industry and Acronym and Terminology List (New)	Combined and updated previous IMD Transportation Industry Acronym and Terminology sections into one section and updated all entries to include references.
002	Required Documents, Plans, Policies and Reporting (Renamed)	Renamed Section 002 to include reporting requirements for grants.
002	Reporting Requirements	Section 900 renamed to “Reporting Requirements” and moved to Section 002, references and links updated.
002	Reporting Requirements	Added introduction paragraph and link to IMD required Smartsheet reporting for grants.
002	Required Documents, Plans and Policies	Revised content to current approval requirements for documents, plans and policies for grants.
900	Reporting (Renamed and Moved)	Renamed “900 – Reporting” to “Required Reporting” and moved to Section 002.
1000	Technology	Minor Updates to current policy, major updates to be added once the Tech RFP process has been completed.

Annual Contact and Info Update Request

- Update Requests have been sent out.
- We have a 75% completion rate so far.
- We are asking for you to verify your contact information, address, phone numbers, etc.
- Accountable Executive – County/City Manager, not the Transit Director

Training Information

- **Drug & Alcohol Program Manager (DAPM) & Reasonable Suspicion Training**
 - Training Dates:
 - **DAPM - September 11-13, 9 a.m.-12 p.m. (3 days, must attend all)**
 - **Reasonable Suspicion - September 14, 1 p.m.- 4 p.m.**
 - Training will be virtual via GoTo Webinar -Share registration information with staff that will attend.
 - DAPM Registration Link :
<https://attendee.gotowebinar.com/register/6703738220124635996>
 - Reasonable Suspicion Registration Link:
<https://attendee.gotowebinar.com/register/1674188305119184221>

Training Information

- **PASS Train the Trainer Courses**
 - Locations were based on training survey information
 - Training to be held in 3 locations across the state
 - **Pitt County September 28 – 29**
 - **WNC – location unconfirmed - October 9-10**
 - **Harnett County October 12-13**
 - 2-day training – may require overnight travel depending on locations
 - Reminder – This course is a Train the Trainer, initial certification class, not a recertification class. This course is to teach system trainer(s) how to teach and certify their employees on PASS.
 - Seating capacity for each class is 20, suggested maximum participants from transit systems per course is 2.

Training Next Steps

- ADA Training will be delivered early in 2024
- New Director's training is being developed and will begin in early 2024 – this will be a comprehensive program. More information to come!
- PASS will be offered again in Spring/Summer 2024
- DAPM / Reasonable Suspicion will be offered again in Early Spring 2024.
- These and any other trainings will be announced and will be added to the NCDOT-IMD training calendar when dates are confirmed



Planning & Programming Updates



IMD On-Demand Microtransit Annual Report 2023

- Provides overview of on-demand microtransit and service models
- Identifies benefits and potential challenges
- Compares microtransit to other transit modes
- Highlights success stories, including MEE NC
- Summarizes key findings from *NCSU Public Microtransit Pilots in the State of North Carolina: Operational Characteristics, Costs, and Lessons Learned*
- Will be available soon on IMD webpage: [NCDOT: On-Demand Microtransit](#)

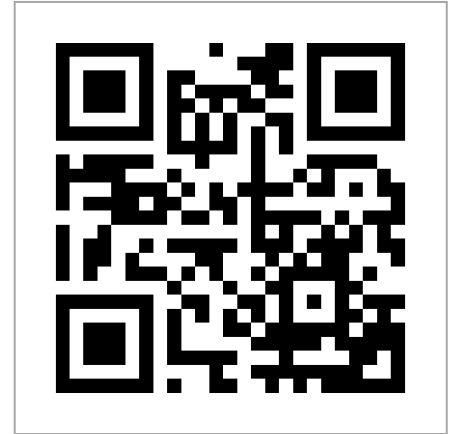


Locally Coordinated Plan Upcoming Milestones

Scan for stakeholder survey

Transit System Help Needed!

- **Stakeholder survey is live.** An email went out from Blair Chambers on July 28th. The survey will **close on August 18th**. The survey looks to solicit feedback from all agencies, non-profits, and other entities purchasing services using § 5310 funds.
- **Virtual public meetings will be held on August 30th at 10 am and at 6 pm and again on September 7th at 4 pm.** The content and format will be identical. Need transit systems help in notifying riders and general public in their service areas
- **Public survey** (different than stakeholder survey) will be part of the public meeting process and will be open after the meetings have occurred. Assistance from transit systems is also needed to publicize survey and distribute paper copies for those who cannot fill out the online version



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

ZEV Fleet Transition Plans

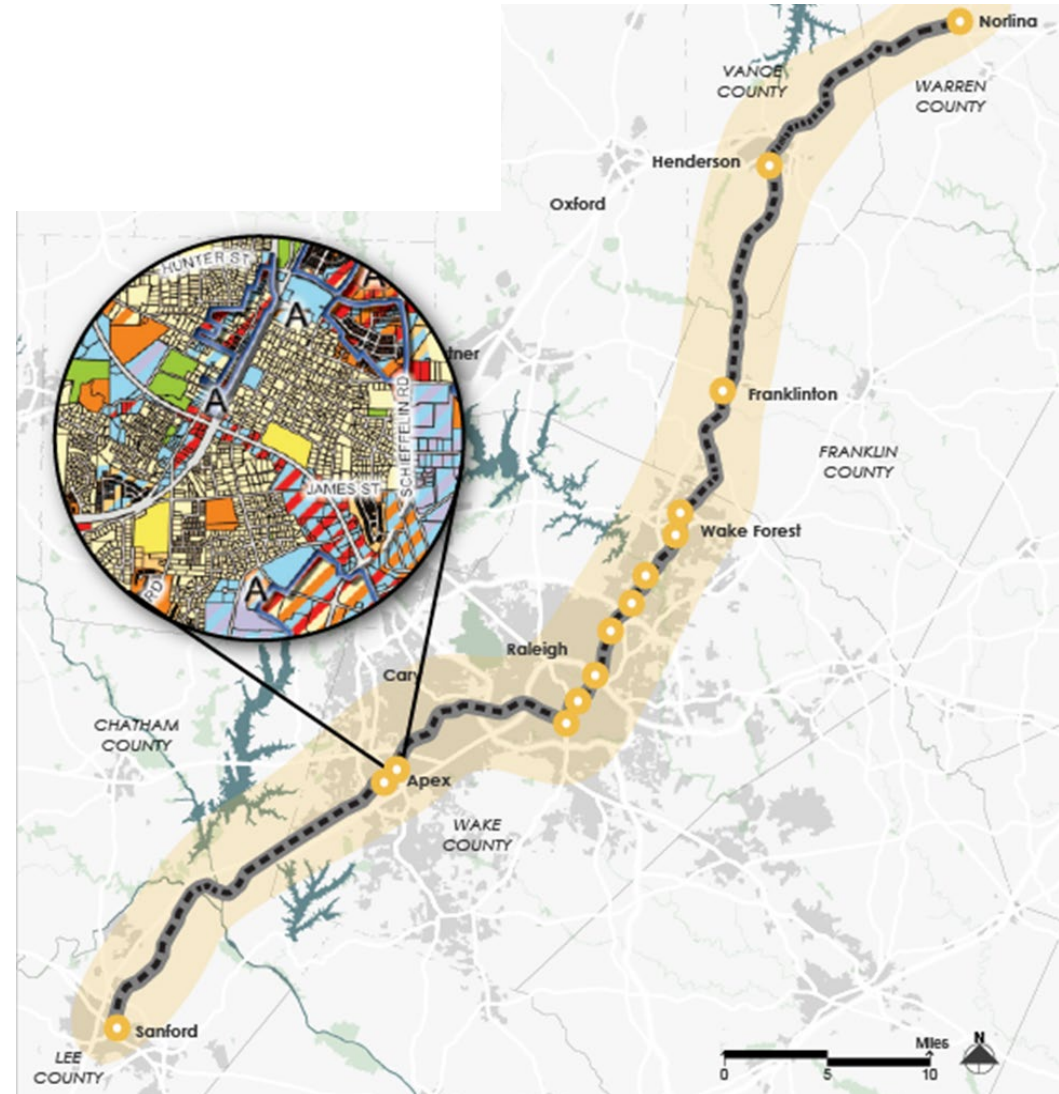
- Plans will be compliant with requirements of FTA 5339 “Low-No” Capital Grant
- Analysis encompasses fleet type, maintenance, charging & energy modeling, financial modeling.
- Kick-off in September



S-Line TOD Planning Study



- Preparing communities for passenger rail
- FTA Grant Award (\$900,000)
- Plan the “place” around transit
- Proactively plan context-driven TOD
- Corridor-wide Conversation
 - Vision & Goals
 - Funding / financing
 - Transit operations
- Local Implementation
 - Land use plans & zoning
 - Regulatory Policies
 - Infrastructure investments
 - Catalytic sites



Final Report Released July 2023

- **Community Playbooks**
 - Policy, Funding, and Infrastructure Priority Recommendations
 - Built Form and Development Recommendations
- **7 communities, 13 unique study areas**
 - Sanford to Norlina
- **For more information:**
<https://www.ncdot.gov/divisions/integrated-mobility/innovation/s-line-study/Pages/default.aspx>



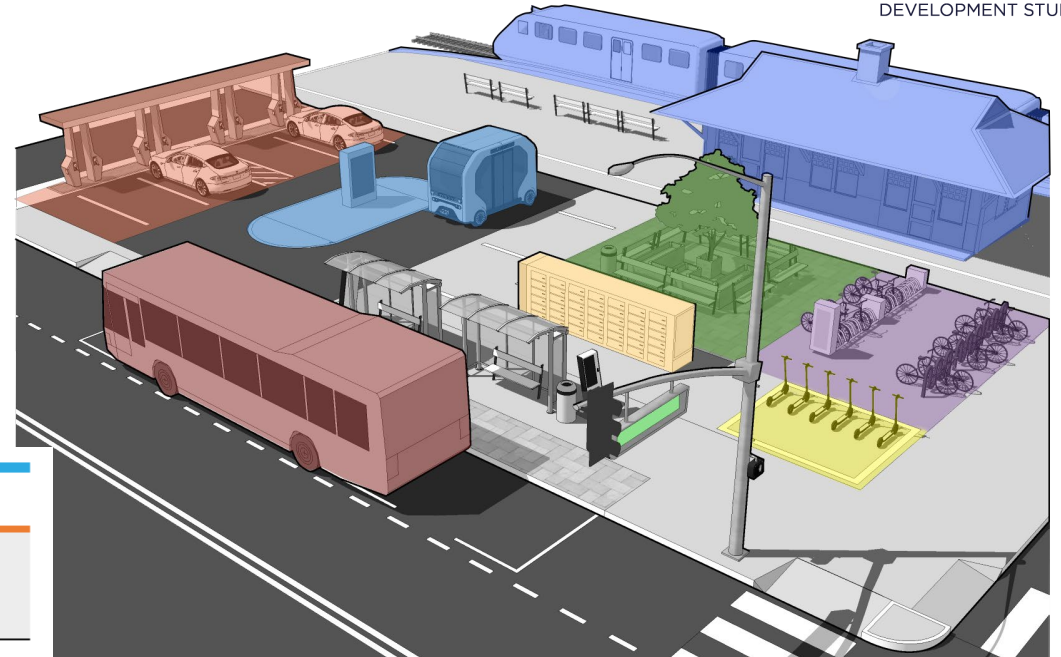
Next Steps – Mobility Hub Plan



FY 2022 RAISE Grant Awarded

North Carolina Regional S-Line Mobility Hub Plan

Plan will focus on defining the scope, physical location and potential hub layout. Whether built for intercity and/or commuter rail service, future stations will be ready for last-mile solutions



State & local leaders celebrate RAISE grant

Mobility Hub Location	Task	Cost	Total
Sanford*	Feasibility/Site Assessment	\$150K	\$950K
	NEPA	\$300K	
	Preliminary Engineering	\$500K	
Apex	Feasibility/Site Assessment	\$150K	\$150K
Wake Forest	Feasibility/Site Assessment	\$150K	\$950K
	NEPA	\$300K	
	Preliminary Engineering	\$500K	
Youngsville	Feasibility/Site Assessment	\$150K	\$150K
Franklinton*	Feasibility/Site Assessment	\$150K	\$150K
Henderson*	Feasibility/Site Assessment	\$150K	\$950K
	NEPA	\$300K	
	Preliminary Engineering	\$500K	
Norlina*	Feasibility/Site Assessment	\$150K	\$950K
	NEPA	\$300K	
	Preliminary Engineering	\$500K	
Total		\$4.25M	\$4.25

*Rural area pursuant to the NOFO definition.

Other Updates & Reminders

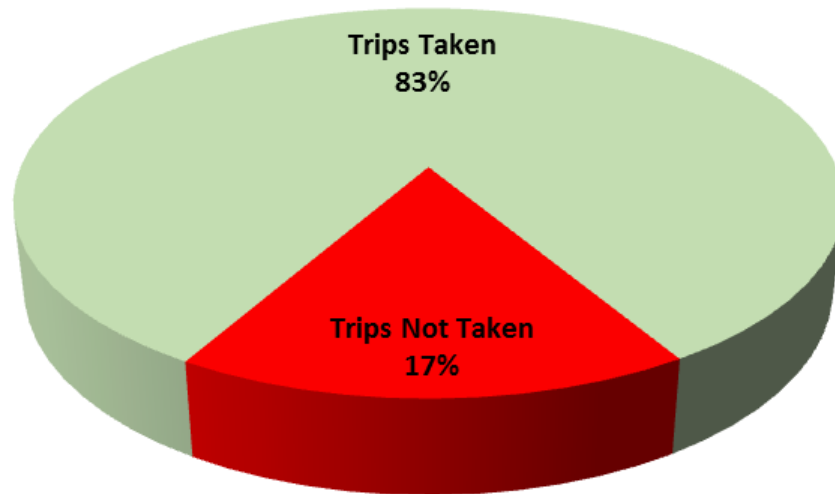


FY24 OPSTATS Training Summary

Economic Benefits of Transit

- Measures the economic and mobility benefits created by public transportation in North Carolina

Absence of Public Transportation



Sources: NCTR 2014 and FY15 NC OpStats

60.1 million trips would be taken via other modes

Individual transportation costs
Congestion and delay
Road maintenance and construction
Health impacts

12.3 million trips would not be taken

Delayed medical treatment
Work productivity
Education/training
Shopping and tourism

Lost Economic Contribution

Wages
Business output
Jobs
Value added/State product

Research Approach Overview

Utilize parallel approaches to provide a comprehensive picture of economic and mobility benefits

1. Transportation Cost Savings and Affordable Mobility Benefits:

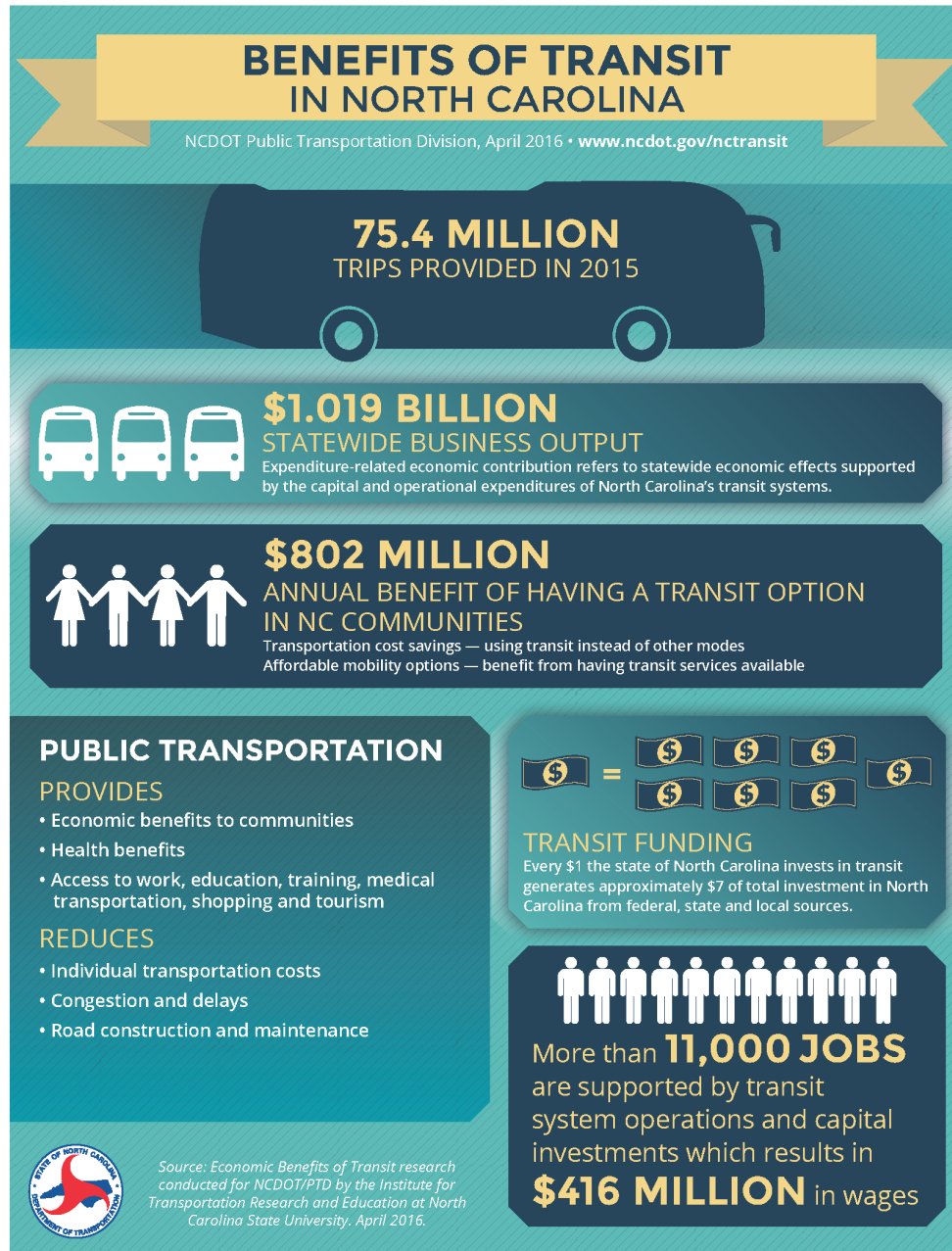
- Methodology developed by SURTC
- Augmented by methodology for urban areas developed by CUTR
- Utilized information on congestion benefits in urban areas from TTI
- Applied NC Operating Statistics Data

2. Economic Contributions Analysis

- Utilized TREDIS
- Applied NC Operating Statistics Data
- Focused on economic inputs/outputs

Outputs

- Statewide Business Output
 - Expenditure-related contribution refers to statewide economic effects supported by the capital and operational expenditures of North Carolina's transit systems
- Annual Benefit of Having a Transit Option in NC Communities
 - Transportation Cost Savings: Using transit instead of other modes
 - Affordable Mobility Benefits: Benefit from having transit services available
- Transit Funding
 - For every \$1 North Carolina invests in transit funding generates approximately \$5 of total investment from federal and local sources
- Jobs & Wages
 - The number of jobs supported by transit systems operations and capital investments and corresponding wages



Economic Benefits of Transit

- Consistent methodology for estimating the benefits of public transportation to stakeholders
- Contained in a single-page handout
- Designed to be updated annually
- Calculated at the individual transit system level
- Can be aggregated to regional and state levels

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.
- Vehicle Rebuild Waiver Survey (Closes 01/13/23)
- 🔗 HOPE Grant Project - Mountains to Sea: Electrifying North Carolina's Transit Fleets Webinar (Jan 17)
- 🔗 NCDOT-IMD Presents "Claim Submittal 101" (Jan 12)
- 🔗 Disadvantaged Business Enterprise Stakeholders Meeting (Jan 10)

ROAP Reports

- ROAP Report Entry (Monthly)

Transit Activity Reporting

- Accident/Incident Reporting (Active)

Charter Reports

- Charter Report Quarterly Submission (new)

Vehicle Related Reporting

- Vehicle Disposition Tracking (Coming Soon)

Transit Communication Hub

IMD Calendar (Website) (View Only) : smartsheet Report Abuse Help

Calendar View Filter

February - March 2023

1 Month

February 2023

S	M	T	W	T	F	S
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2023

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

April 2023

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
February 5	6	7	8	9	10	11
Areas of Persistent Poverty Program FY 2023 Survey of Interest Window						
FY23 Low or No Emission Grant Program & the Grants for Buses and Bus Facilities Competitive Pro						
FY24 5303 Planning Application Window						
			Transit System			
12	13	14	15	16	17	18
FY23 Low or No Emission Grant Program & the Grants for Buses and Bus Facil						
FY24 5303 Planning Application Window						
			Multimodal Up			
19	20	21	22	23	24	25
FY24 5303 Planning Application Window						
26	27	28	March 1	2	3	4
		Monthly Claim				
FY24 5303 Planning Application Window						
5	6	7	8	9	10	11
			Transit System			
FY24 5303 Planning Application Window						

View Detail

FY23 Low or No Emission Grant Program & the Grants for Buses and Bus Facilities Competitive Program Survey of Interest Window

Date
02/07/23

End Date
02/15/23

Time

Link
<https://app.smartsheet.com/b/form/6ef27e6b03434abc8fe>

Point of Contact
Blair Chambers

Contact Email
tbchambers@ncdot.gov

Transit Communication Hub

Due in the Last 30 Days & the Next 45 Days (View: [smartsheet](#))

Transit System Meeting @ 1pm	02/08/23
DAMIS Report FY23 (Jan - Dec) (CT)	02/15/23
Multimodal Updates Meeting	02/15/23
Monthly Claims Due (w/DBE and Progress Reports)	02/28/23
Transit System Meeting @ 1pm	03/08/23

Communications

✓ Date Sent	 Name	Subject
2/7/2023	 FY23 5339 Survey of Interest ✱	Announcements
2/6/2023	 TLDP Registration - Spring 2023 ✱	Training
1/30/2023	 FY2024 Application Certs and Assurances Package	Announcements
1/30/2023	 Areas of Persistent Poverty Program FY2023 Notice of Funding Opportunity ✱	Announcements

QUESTIONS



Previous slides, recordings and FAQs:

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

Provide feedback and ideas for topics:

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