



# NORTH CAROLINA

Department of Transportation



# Integrated Mobility Division Transit Systems Call

June 14, 2023



# AGENDA

- Finance & Grant Admin. Updates
- Procurement & Vehicle Updates
- Compliance Updates
- Other reminders and updates
- Questions

# Finance Updates





# Finance Updates

- Final claims are due in EBS on or before July 30, 2023, for all projects ending on June 30, 2023. Please check the period of performance on all of your open projects and submit your claims asap.
- You must submit a change request to balance all budgets prior to submitting final claims in EBS. Any claims we receive in overdraft, will be returned for correction.
- IMD completed a blanket extension for all CARES and ARPA projects. The new end date on these projects is June 30, 2024. You do not need to submit a period of performance request for these projects.
- Finance will begin sending out FY24 contracts via DocuSign for all State programs to include: Urban State Match, Advanced Technology, Concp, Rural State Operating (1<sup>st</sup> round), Rideshare and Traveler's Aid



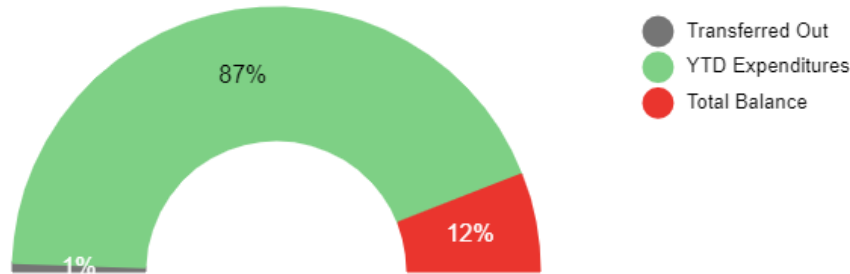
# ROAP Update as of June 13, 2023

Overall ROAP Stats		
Primary	Amount	% Total Allocation
<b>ROAP Allocation</b>	\$18,690,029	
<b>Carryover</b>	\$3,629,744	
<b>Allocation + Carryover</b>	\$22,319,773	
<b>Transferred Out</b>	\$232,372	1%
<b>YTD Expenditures</b>	\$19,426,804	104%
<b>Total Balance</b>	\$2,660,597	14%

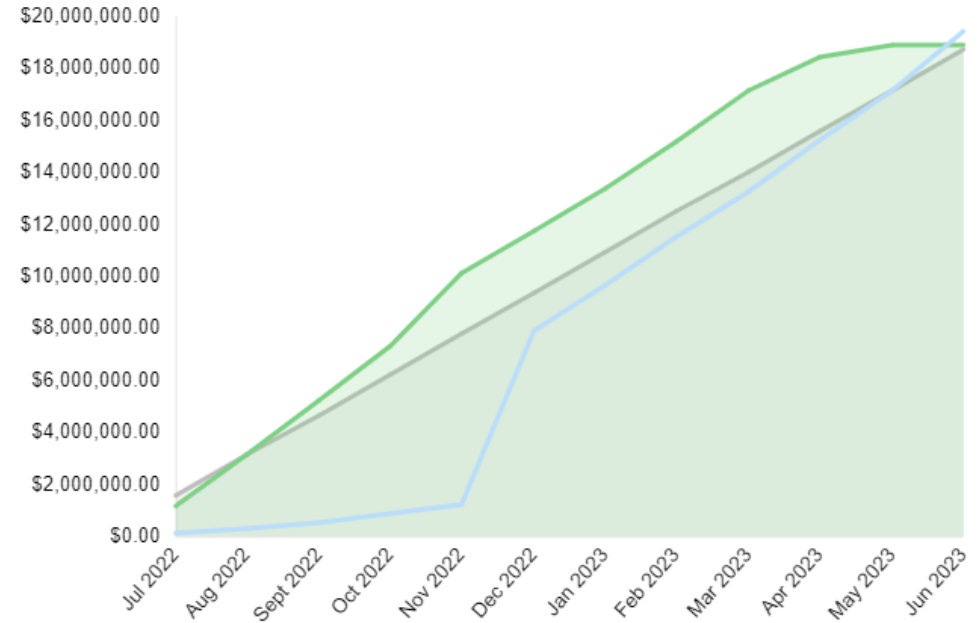
EDTAP, EMPL, RGP Stats				
SFY2023	Net Allocation	Expenditures	% Expended	County Funds Used
EDTAP	\$10,172,077	\$9,637,287	95%	\$2,831,366
EMPL	\$2,775,946	\$2,853,917	103%	\$1,326,464
RGP	\$9,130,780	\$6,935,599	76%	\$1,135,243
<b>Totals</b>	<b>\$22,078,803</b>	<b>\$19,426,804</b>	<b>88%</b>	<b>\$5,293,074</b>

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

- Upcoming Reporting Dates:
  - April 2023 ROAP report is due June 15th
  - May 2023 ROAP report is July 15th
  - June 2023 ROAP report is due on or before July 31st
- The end of year reconciliation of ROAP reports will begin in July, if past reports need to be corrected or submitted, please advise as soon as possible.
  - RGSs will 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 link to the SmartSheet is:  
<https://app.smartsheet.com/b/form/ea46d9e0611c406d84b62a9b72b82c78>
- The FY24 ROAP application will be posted later this summer, notification will be made when it is available.

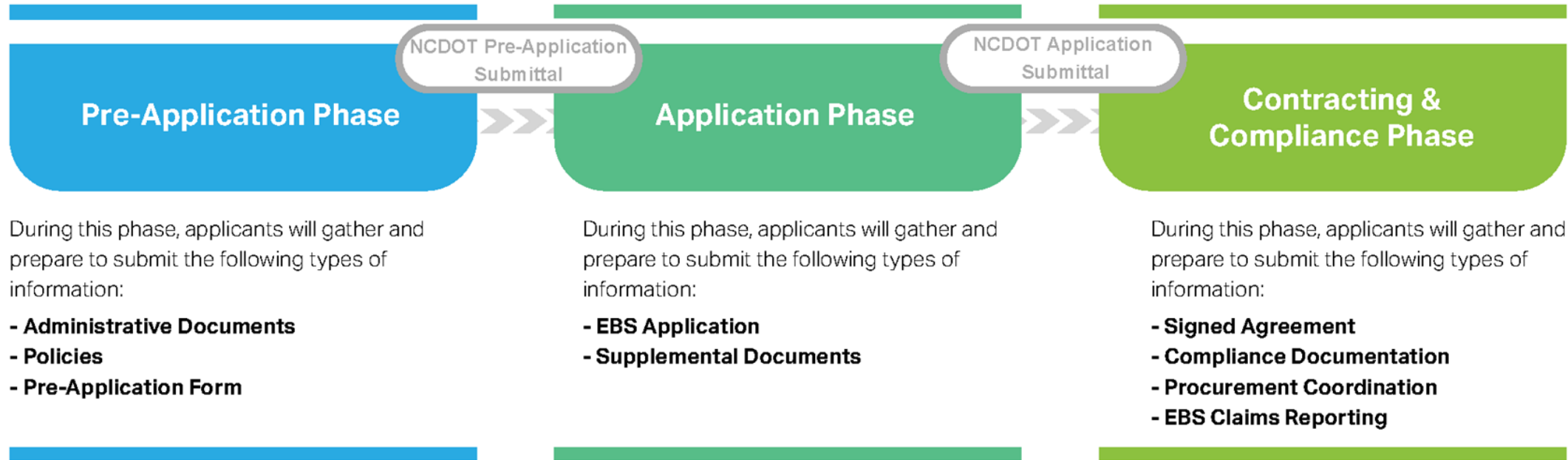


# Grant Administration & Procurement Updates





# FY 25 Unified Grant Application (UGA) Process



- Application Phase (EBS Applications) OPENS — Monday, **July 3, 2023**
- Completed Grant Applications due in EBS – Friday, **October 6, 2023**
- You will receive an email with more instructions prior to the Application Phase opening
- By **June 30, 2023**, all vehicle mileage must be up-to-date in Asset Works to be included in the FY 25 Vehicle Replacement List
- For any technical assistance, reach out to your RGS



## Grant Applications Opening July 3,2023

- ▶ 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)





# Rural State Operating Overview

- 2<sup>nd</sup> Call for Projects opened April 24, 2023
- Funding available - \$6,876,600
- Projects received totaled \$11,576,466
- Due to the amount requested, reductions were required
- All requests up to \$100,000 were funded at 100%
- Requests over \$100,000 were funded at the first \$100,000 and then at 70% of the remaining balance
- Multiple G-codes were available for this grant:
  - G-251 (Fuel and Lube)
  - G-252 (Tires and Tubes)
  - G-313 (Trips)
- If a request had all 3 eligible G codes requested, only G-313 was approved because G-313 uses a trip rate that should include the others





# Procurement Updates



# Procurement Updates – Vehicle Ordering

- FY23 Vehicle Orders
  - NCDOT Agency Specific Contract 54-SG-05062021 has been awarded
    - Awarded as of 4/18/23 to the following vendors:
      - Creative Bus Sales, Inc.
      - Interstate Transportation Sales, Inc.
      - Palmetto Bus Sales, Inc.
  - Systems who have been approved for NCDOT/FTA funding in FY23 may now look to order vehicles utilizing this contract
  - When placing orders:
    - Please make sure that you have an active executed agreement funding these orders
    - Make sure that the vehicle type you are ordering matches the G-code in your approved agreement
    - CC Chris Dodson, Procurement Officer when the order forms are emailed to the vendor of your choice
      - Chris Dodson
      - [cbdodson@ncdot.gov](mailto:cbdodson@ncdot.gov)
      - 919-707-4696

# NCDOT Technology RFP

- NCDOT Agency Specific RFP for “Transit Software Solutions” closes on 6/19/23
  - Soliciting for proposals related, but not limited to:
    - Transit scheduling software
    - Automated fare payment solutions
    - Microtransit services
    - Automatic vehicle location (AVL)
- Once RFP closes, the evaluation committee will look to review proposals and put together a shortlist of vendors for further demonstrations and product assessments
- Contract should be awarded prior to close of calendar year 2023
- Systems with approved funding sources/grants may look to potentially use this contract in the future to help procure transit software contracts or products



# Compliance Updates

# 2023 Compliance Reviews

- In 2023, we will cover 51 Compliance Reviews
  - 30 5310 Non-Profit Reviews (will begin in May/June)
  - 21 5311 Transit System Reviews (Will begin in the Fall)

### Compliance Reviews

Compliance Reviews

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

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#### 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)





# Other Updates & Reminders

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# Training Information

- **Training Survey** – Survey link was sent via email on 6/7/23
  - Surveys can be completed by more than one person per agency.
  - The survey will take 15-30 minutes to complete depending on the level of input on open-ended questions.
  - This is a mandatory survey. There must be at least one response from every 5311 and/or 5310 subrecipient.
  - Survey will be open until COB on **June 21st, 2023**
- **PASS Training** – IMD will be offering in-person PASS training classes.
  - Multiple opportunities in different locations across the state, dates are TBD.
  - If you have a facility that can accommodate up to 20 participants, and can have 2 vehicles available to do hands-on training, e-mail Kevin Edwards @ [kbedwards2@ncdot.gov](mailto:kbedwards2@ncdot.gov) to offer your location. This will help get class locations determined and dates can then be set for the training.
  - *Train the Trainer*, initial certification class, not recertification classes.

# Annual Contact and Info Update Request

- Update Requests will come out soon. This is not a survey that you will receive a link to, it will come by email.
- We are asking for you to verify your contact information, address, phone numbers, etc.
- We will also be asking for other information that helps us with some of our processes and data needs.
- Please complete and submit by the end of July.

# Transit Agency Pre-Schedule Criteria Survey

- Survey will be released after today's call.
- This survey is mandatory.
- Please complete it by June 30<sup>th</sup>.



# Future Meeting Formats

- Beginning July 14<sup>th</sup>, we will move our Meetings to the TEAMS format. This will help with recording and providing a better record of future meetings.
- The meeting invites will have a TEAMS link built into the invite and should be the same link going forward.
- Nothing else should change for you, however it would be a good idea to confirm that you can use TEAMS before July 14<sup>th</sup>.

# 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](mailto: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	 <a href="#">FY23 5339 Survey of Interest</a> ✱	Announcements
	2/6/2023	 <a href="#">TLDP Registration - Spring 2023</a> ✱	Training
	1/30/2023	 <a href="#">FY2024 Application Certs and Assurances Package</a>	Announcements
	1/30/2023	 <a href="#">Areas of Persistent Poverty Program FY2023 Notice of Funding Opportunity</a> ✱	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>