Rural Transit Program 2024-2026 Application Guidance Applications Due **May 2<sup>nd</sup>, 2024** 

**EVADA** 

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# **Table of Contents**

Important Dates	3
Program Goals	3
Changes from 2023	3
Rural Transit Program Overview	4
Section 5304: State Planning and Research Program	5
Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities Program	າ7
Section 5311: Rural Area Program	9
Section 5339: Bus and Bus Facilities Program	11
Application Process	13
Selection Process and Evaluation Criteria	16
Glossary	19
Appendix A - Using BlackCat	25

# **Important Dates**

- Call for projects to commence April 2, 2024
- Grant applications due May 2, 2024
- Selections announced July August 2024

## **Program Goals**

- Enhance the accessibility to health care, shopping, education, employment, public services, and recreation for Nevada citizens located in nonurbanized areas.
- Assist in the maintenance, development, improvement, and the use of public transportation systems in the rural communities.
- Encourage and facilitate the most efficient use of federal funds used to provide passenger transportation in nonurbanized areas through the coordination of programs and services.
- Encourage employment-related transportation alternatives.
- Provide for the participation of private transportation providers in nonurbanized transportation opportunities to the maximum extent feasible.
- Promote the availability of cost effective, efficient, and coordinated passenger transportation services that meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable.

# Changes from 2023

- All agreements will have two-year periods of performance, four-year agreements will no longer be an option.
- Certifications of Commitment from designated match resources, in memo format on their official letterhead, are required with the submission of the grant application to certify required match amounts.
- Existing subrecipients must submit their Grant Applications utilizing the <u>BlackCat</u> system.

# **Rural Transit Program Overview**

The Nevada Department of Transportation (NDOT) administers four Federal Transit Administration (FTA) programs for rural public transit funding assistance in Nevada. These include:

- 5304: State Planning and Research Program
- 5310: Enhanced Mobility of Seniors and Individuals with Disabilities Program
- 5311: Rural Area Program
- 5339: Bus and Bus Facilities Program

State agreements with subrecipients are awarded through a competitive process supported with federal funding from the Federal Transit Administration (FTA). Funding is available for:

- Rural Nevada public transportation.
- Intercity Bus Service connecting rural Nevada with urban areas.
- Procurement of buses, bus facilities and bus and bus facility related equipment.
- Rural Nevada public transportation services to enhance the transportation of seniors and persons with disabilities.

Each of the funding programs are described in further detail in the following sections, including eligible recipients/subrecipients, eligible activities, and funding and match requirements.

# Section 5304: State Planning and Research Program

## **Program Overview**

Under this program, funds are provided to states to support statewide transportation planning programs. The funds administered through NDOT may be used for a variety of rural Nevada transportation improvement planning purposes.

The program also provides funding and outlines procedural requirements for multimodal transportation planning in both metropolitan and non-metropolitan areas that is cooperative, continuous, and comprehensive, resulting in long-range plans and short-range programs of transportation investment priorities.

Funds are available for planning activities that:

- Increase the safety of the transportation system for motorized and nonmotorized users.
- Increase the security of the transportation system for motorized and nonmotorized users.
- Increase the accessibility and mobility of people and freight movements.
- Protect and enhance the environment, promote energy conservation, improve quality of life, and promote consistency between transportation improvements and state and local planned growth and economic development patterns.
- Enhance integration and connectivity of the transportation system across and between modes, for people and freight.
- Promote efficient system management and operation.
- Emphasize the preservation of the existing transportation system.

Additional information about the program can be found in <u>FTA Circular 8100.1D Program</u> <u>Guidance for Metropolitan Planning and State Planning</u> and FTA <u>Circular 5010.E Award</u> <u>Management Requirements</u>.

## **Eligible Recipients and Subrecipients**

Eligible recipients and/or subrecipients for the for the 5304 Planning and Research Program include:

- State Departments of Transportation (DOTs).
- Local governmental authorities and operators of public transportation systems may become subrecipients.

## **Eligible Activities**

Eligible activities for the 5304 Planning and Research Program include:

- Developing transportation plans and programs.
- Planning and evaluating transportation projects.
- Conducting technical studies.

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6

 Comprehensive intermodal transportation planning, including relationships among land use and transportation modes.

## **Funding and Match Requirements**

The Federal share of this program is 80%, with a required Local Match of 20%.

Eligible matching funds may include:

- Local tax revenues, such as sales tax receipts.
- Funds from other public agencies.
- Private donations, excluding passenger donations in lieu of fares.
- Advertising revenue.
- Corporate or foundation grants.
- State funds received from agencies other than the DOT.
- In-kind goods and services, including donated labor (operating, mobility management and planning projects only).
- Revenue from other grants awarded to your organization.
- Other funds from your organization not related to passenger services provided under the project (i.e., freight).
- Reserve funds or retained earnings from your organization.
- Contract revenue.

# Section 5310: Enhanced Mobility of Seniors and Individuals with Disabilities Program

## **Program Overview**

This program provides capital and operating assistance to improve mobility for seniors and individuals with disabilities by removing barriers to transportation services and expanding transportation mobility options. NDOT's administration of the program supports transportation services that are planned, designed, and carried out to meet the special transportation needs of seniors and individuals with disabilities in rural areas.

The program provides funds for public transportation to meet the needs of older adults and people with disabilities when public transportation is insufficient, inappropriate or unavailable; public transportation projects that exceed the requirements of the American Disabilities Act (ADA) and the Clean Air Act (CAA); public transportation projects that improve access to fixed-route service and decrease reliance on complementary paratransit service; and alternatives to public transportation that meet the transportation needs of older adults and people with disabilities.

Additional information about the program can be found in FTA's <u>Section 5310 Circular 9070.1G</u> <u>Program Guidance and Application Instructions</u>, and FTA <u>Circular 5010.E Award Management</u> <u>Requirements</u>.

## **Eligible Recipients and Subrecipients**

Eligible recipients and/or subrecipients include:

- Private nonprofit organizations.
- Federally recognized Indian tribes.
- State or local governmental authorities approved by the state to coordinate services for older adults and people with disabilities.
- State or local governmental authorities which certify to the Governor that no nonprofit organization or associations are readily available in the area to provide the services.
- Private taxi shared ride operators.

## **Eligible Activities**

Eligible activities for the 5310 programs are divided into Traditional and Nontraditional.

Traditional project examples include:

- Buses and vans.
- Wheelchair lifts, ramps, and securement devices.
- Transit-related information technology systems.
- Mobility management programs.
- Preventive maintenance (only for Section 5310 funded vehicles).
- Acquisition of transportation services under a contract, lease, or other arrangement.

Nontraditional project examples include:

- Travel training.
- Volunteer driver programs.
- Construction of accessible pathways to transit stops including curb-cuts, sidewalks, accessible pedestrian signals, as examples.
- Signage and wayfinding improvements.
- Mobility management programs.
- Purchasing vehicles to support new accessible taxi ride share or vanpool programs.
- Incremental cost of providing same day or door-to-door service.

### **Funding and Match Requirements**

The Federal share for this program varies depending on the type of project/activity. The applicable Federal/Local Match requirements are shown below:

- Non-ADA & Non-CAA Capital 80% Federal, 20% Local Match
- Vehicles (ADA and/or CAA compliant) 85% Federal, 15% Local Match
- Facilities & Equipment (ADA and/or CAA compliant) 90% Federal, 10% Local Match
- Operating 50% Federal, 50% Local Match

# Section 5311: Rural Area Program

#### **Program Overview**

This program provides formula funding to States and Indian tribes, with the goal of supporting public transportation and enhancing the overall mobility of people living in rural areas. Projects may also include transportation to or from rural areas.

The state receives 5311 funding from the Federal Transit Administration (FTA) and suballocates it to eligible subrecipients. The state prepares an annual Program of Projects (POPs) which must provide for a fair and equitable distribution of funds within the state and must provide for maximum feasible coordination with transportation services assisted by other sources.

Operators of bi-state service are required to comply with the Federal Motor Carrier Safety Administration regulations.

Additional information about the program can be found in FTA's <u>Section 5311 9040.1G Program</u> <u>Guidance and Application Instructions</u>, and FTA circular <u>5010.E Award Management</u> <u>Requirements</u>.

## **Eligible Recipients and Subrecipients**

Eligible recipients and/or subrecipients for the 5311 programs include:

- State and local government authorities.
- Indian Tribes a federally recognized Indian tribe is eligible as a direct recipient or a subrecipient. Once notified by the state of its selection, the tribe can choose whether to receive funds as a subrecipient of the state or to directly apply to the FTA for Section 5311 funds.
- Non-profit organizations.
- Operators of public transportation service, including intercity bus companies.
- Private for-profit operators of transit service may participate in the program as third-party contractors for the state or as a subrecipient.

## **Eligible Activities**

Eligible activities for the Section 5311 Rural Area Program include:

- Capital Costs Preventative Maintenance and Mobility Management (for all other capital expenses/purchases please refer to the FTA Section 5339 program).
- Operating Costs.
- Rural Transportation Training and Technical Assistance activities.
- Job Access and Reverse Commute projects.
- Project Administration.

### **Funding and Match Requirements**

The Federal share for this program varies depending on the type of project/activity. The applicable Federal/Local Match requirements are shown below:

- Preventative Maintenance and Mobility Management 95% Federal, 5% Local Match
- Operating 59.38% Federal, 40.62% Local Match
- Program Administration 80% Federal, 20% Local Match

# Section 5339: Bus and Bus Facilities Program

#### **Program Overview**

The Grants for Buses and Bus Facilities program makes Federal resources available to states and designated recipients to replace, rehabilitate, and purchase buses and related equipment and to construct bus related facilities including technological changes or innovations to modify low or no emission vehicles or facilities exceeding the standards of the Americans with Disabilities Act (ADA) and Clean Air Act (CAA). A sub-program provides funding for bus and bus facility projects that support low and zero-emission vehicles.

Additional information about the program and eligible expenses can be found in FTA's <u>Section</u> <u>5339 Circular 5100.1 Bus and Bus Facilities Formula Program: Guidance and Application</u> <u>Instructions</u>, and <u>FTA Circular 5010.E Award Management Requirements</u>.

Awards to subrecipients in rural areas are also subject to the requirements of FTA Section 5311 Rural Area Programs. NDOT administers Section 5339 funds allocated to the State of Nevada rural (non-urban) areas.

## **Eligible Recipients and Subrecipients**

Eligible recipients and/or subrecipients include:

- Designated recipients that operate fixed route bus service or that allocate funding to fixed route bus operators.
- Local governmental entities that operate fixed route bus service that are eligible to receive direct grants under Section 5311.
- Rural subrecipients that are public agencies or private nonprofit organizations engaged in public transportation, including those providing services open to a segment of the general public.

## **Eligible Activities**

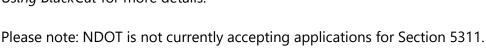
Eligible activities for the 5339 Grants for Buses and Bus Facilities Program include:

- Capital Projects -
  - Replace, rehabilitation, overhaul, and purchase(s) of buses, vans, and related equipment.
  - Construct bus-related facilities.
  - Technological changes or innovations to modify low or no emission vehicles or facilities.
- Project Administration -
  - Administrative activities of an organization pertaining to the immediate accomplishment or oversight of a project.
  - Project administration costs must be directly associated with administering the capital project.

**Funding and Match Requirements** 

applicable Federal/Local Match requirements are shown below:

- Non-ADA & Non-CAA Capital 80% Federal, 20% Local Match
- Vehicles (ADA and/or CAA compliant) 85% Federal, 15% Local Match
- Facilities & Equipment (ADA and/or CAA compliant) 90% Federal, 10% Local Match



New subrecipient applicants must access the NDOT PDF fillable application from the NDOT Transit division website (<u>https://www.dot.nv.gov/mobility/transit</u>). Applications from new subrecipients must be emailed to the <u>TransitTeam@dot.nv.gov</u> and/or mailed to the Transit Office at the address shown below.

1263 S Stewart St. Suite 320 Carson City, NV 89701

The schedule for this year's Project Solicitation and Program Awards is summarized below.



## **Application Steps**

#### **ACCESSING THE APPLICATION**

- New applicants must download the application and addendums from the NDOT Transit website <u>https://www.dot.nv.gov/mobility/transit</u>.
- Existing subrecipients must access the application and addendum(s) through <u>BlackCat</u>.

Review the program specific information above to determine which type of funding your project is eligible for.

# **Application Process**

## **Overview & Program Schedule**

Applicants must submit applications between April 2, 2024, and May 2, 2024. Existing subrecipient Applicants must access and upload the NDOT PDF fillable application form (add supplemental addendum(s) if needed) from the <u>BlackCat</u> system. <u>BlackCat</u> is a secure, web-based grant management system that allows agencies to apply for funding through an online grant application process. It also enables users to track their project budgets and request payments in one easily accessible database. <u>BlackCat</u> will confirm submission of the application, but it will not include an assessment of adequate completeness. The Transit Team will review applications for completeness and will contact potential subrecipients with any questions and/or requests for additional documentation. Please refer to Appendix A – *Using BlackCat* for more details.

For required application documentation by program, see below:

- Section 5304
  - Section 5304 Grant Application
    - > Complete one Section One per *applicant*
    - Complete one Section Two per *project* (this may result in multiple project sections of the application)
  - New Applicant Addendum
- Section 5310
  - Section 5310 Grant Application
    - Complete one Section One per *applicant*
    - Complete one Section Two per *project* (this may result in multiple project sections of the application)
  - New Applicant Addendum
- Section 5311 (NDOT is not currently accepting Section 5311 applications)
  - Section 5311 Grant Application
    - > Complete one Section One per *applicant*
    - Complete one Section Two per *project* (this may result in multiple project sections of the application)
  - New Applicant Addendum
  - NDOT Rural Special Section 13C
  - NDOT Rural Special Section 5333B Warranty
  - NDOT Rural Special Section 5333B Statement of Acceptance
- Section 5339
  - Section 5339 Grant Application
    - > Complete one Section One per *applicant*
    - Complete one Section Two per *project* (this may result in multiple project sections of the application)
  - New Applicant Addendum

#### NUMBER OF APPLICATIONS

Subrecipients may submit an unlimited number of applications.

#### **BUDGET SECTION**

- Matching Share
  - Local funds revenue generated from local sources, including but not limited to:
    - > Funds received from government and municipal sources.

- > Other local or private grant programs or donations.
- Income generated from service contracts or other internal activities such as advertising or freight fees.
- Other Federal funds eligible as local match coming from a nontransportation source. The Coordinating Council on Access and Mobility (CCAM) provides a <u>Federal Fund Braiding Guide</u> regarding this process.
- SAMPLE BUDGET
  - Please list all non-FTA funds and sources as applicable as well as amounts.

Non-FTA Funds	Funding Source (list each)	Total Amount (\$)
Non-FTA Federal		
Other Funds		
In-kind Match		

#### **MILESTONES**

- Each non-rolling stock activity has a minimum of five (5) milestones.
  - Non-rolling stock is defined as the purchase of steel, iron, and/or manufactured goods.

Milestone	Estimated Completion Date	Description
Commencement of Funding		
1st Year Funding Report Sent to NDOT		
2nd Year Funding Report Sent to NDOT		
Closeout Funding Report Sent to NDOT		
Funding Closed		

- Each rolling stock activity has a minimum of five (5) milestones.
  - Rolling stock is defined as transit vehicles such as buses, vans, cars, and buses, and ferry boats, as well as vehicles used for support services.

Milestone	Estimated	Description
	Completion	
	Date	
Commencement		
of Funding		
Vehicle Purchase		
Requested		
Vehicle Purchase		
Approved		
Vehicle Purchase		
Completed		
Closeout		
Funding Report		
Sent to NDOT		

#### **REQUIRED ATTACHMENTS**

- Most Recent Single Audit
- Nonprofit 501c Determination (New Applicants)
- Service Area Map
- Population Density Map
- Match Commitment Letters
- In-kind Match Valuation

# **Selection Process and Evaluation Criteria**

This memo summarizes the proposed draft selection process and evaluation criteria for the 2024 Rural Transit Program. The evaluation criteria are aligned with the One Nevada transportation process goals, as described below.

### **Selection Process**

The proposed process includes three tiers: evaluation of applications for eligibility and completeness, evaluation for consistency with One Nevada and Rural Transit Program goals, and technical capacity of the applicant and project readiness.

**TIER 1: EVALUATE ELIGIBILITY AND COMPLETENESS** - This eligibility screening will be conducted by the NDOT Transit Team and assess whether the application is complete and meets the minimum criteria established for the program. If the application is incomplete, NDOT staff will reach out to the applicant and provide an opportunity to submit the required information within two weeks.

7

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- Application Eligibility and Completeness.
- Included a 2023 transit service map of routes, stops, and hubs.
- Included 2023 annual route miles specific to non-urban rural areas.
- Provided 2023 annual ridership specific to non-urban rural areas.

#### TIER 2: EVALUATE CONSISTENCY WITH ONE NEVADA AND RURAL TRANSIT PROGRAM

**GOALS** – The scoring of the evaluation criteria, which are based on One Nevada and Rural Transit program goals, will be conducted by the NDOT Transit Team. These factors are intended to be yes/no questions with the opportunity to provide additional detail and supporting information.

**TIER 3: TECHNICAL CAPACITY, READINESS REVIEW** – The final step will be an evaluation of the technical feasibility and project readiness for each project/service.

#### **Technical Capacity/Readiness**

- Share of local match and/or documented local commitment to support and implement the project: Does the amount exceed minimum program local match?
- Did the applicant provide a complete and accurate application?
- Did the applicant respond to NDOT questions in a timely manner (within three business days)?
- Does the applicant provide documentation for a reliable local match (local match certification)?
- Did the applicant provide a Sam.gov UEI rating?
- Did the applicant provide the prior year agency single audit reflecting no issues with federal funding?
- Does the applicant have experience managing transportation projects and grant awards?

### **NDOT Internal Review and Approval Process**

Following the review and evaluation by the technical team, the recommendations will be reviewed and approved by NDOT leadership. This will include a review of statewide equity in funding distribution that considers the following factors:

- Geographic distribution across the state.
- Equitable distribution among local/regional governments and tribal agencies.
- Funding of various transit service/project types.
- A meaningful proportion of the rural Nevada population is being served by the grant program.

### **Grant Management References**

- The grant funds awarded must be managed in accordance with <u>2 Code of Federal</u> <u>Regulations (CFR) Part 200</u> - Uniform Administrative Requirement, Cost Principles and Audit requirements for Federal Awards which defines requirements for federal awards.
- The <u>FTA Circular 5010.1E</u> Award Management Requirements, is intended to assist recipients in administering FTA-funded projects and meeting award responsibilities and reporting requirements. Recipients have a responsibility to comply with regulatory requirements and to be aware of all pertinent material to assist in the management of FTA federally assisted awards.
- The Contract Cost Principles and Procedures requirements for third party agreements and private-for-profit providers is located at <u>48 CFR Part 31 – Contract Cost Principles</u> and Procedures.

#### American with Disability Act of 1990 (ADA)

A federal civil rights law that ensures persons with disabilities have equal opportunity to fully participate in Society.

### **ADA Accessible**

Accessible to persons afforded protection under the ADA. For public transportation revenue vehicles, features include ramps/low floors that do not restrict access and are usable; and allocated space and/or priority seating for individuals who use wheelchairs or other devices that are accessible using lifts or ramps. Refer to 49 CFR Part 38.

#### **Capital Expenses**

Assets such as vehicles, equipment, and bus shelters. These items must have a useful life of more than one year and exceed your organization's capital cost threshold.

## Clean Air Act (CAA)

The Clean Air Act (CAA) is the comprehensive federal law that regulates air emissions from stationary and mobile sources.

#### **Commuter Service**

A fixed route that connects outlying areas with a city or connects two nearby cities. It has limited stops within the city/cities and at least five miles of continuous closed-door service.

#### **Cutaway Vehicle**

A vehicle on which a bus body is mounted to the chassis of a van or light-duty truck. Vehicles built on a van chassis are light-duty and vehicles built on a truck chassis are medium-duty.

#### **Demand Response**

Services characterized by flexible routing and scheduling of relatively small vehicles to provide door-to-door or curb-to-curb transportation at the passenger's request. It is also referred to as paratransit or dial-a-ride service.

#### Disability

A condition that limits one or more of a person's life activity.

#### **Disadvantaged Business Enterprise (DBE)**

A for-profit small business at least 51% owned and controlled by a socially and economically disadvantaged individual(s). with a net worth below \$1,320,000. DBE certification from Nevada is required through the state Unified Certification Program (UCP).

#### Equipment

An article of nonexpendable, tangible property having a useful life of at least one year.

#### **Expansion Service**

The acquisition of revenue vehicles for expansion of transit service.

#### Federal ID number

A unique, nine-digit number assigned to all agencies, associations, entities, and organizations by the IRS.

#### **Fixed Route**

Public transportation service on a repetitive, fixed-schedule basis along a specific route that stops for passengers along the way.

#### **General and Local Government Agencies**

The following entities:

- Political subdivisions of the state
- Authority of at least one state or political subdivision of a state
- Public corporation, board, or commission established under the laws of a state
- Incorporated cities, towns, and counties located in rural areas
- Special districts (i.e., schools, ports)
- State agencies.

#### **In-kind Contributions**

Goods and services donated from outside your agency. The value must directly benefit and be specifically identifiable to the project. To be eligible as match, the monetary value of the in-kind contributions must be documented.

#### **In-kind Match Valuation Proposal**

A written proposal that identifies the sources of in-kind match and method for determining their value. It must only include goods and services donated for the project that would represent eligible grant activities. Documentation for goods and services should include donation receipts

from the donor, the item donated, and its fair market value. Volunteer time should include timecards and be charged at either the prevailing wage or the wage rate paid to an employee performing like duties. In-kind match proposals approved by NDOT.

#### **Intelligent Transportation Systems**

Electronics, communications, or information-processing in transportation infrastructure and in vehicles used either singly or integrated to improve transportation safety and mobility and to enhance productivity.

#### Intermodal

The ability to make connections between two or more transportation modes for people and goods.

#### **Local Funds**

Money appropriated by local general-purpose governments; local municipal governments, local districts; or local private agencies for the purpose of supporting public transportation services.

#### **Mobility Management**

Mobility management is an approach for managing and delivering coordinated transportation services to customers. Capital eligible expenses consists of short-range planning and management activities and projects for improving coordination among public and other transportation service providers carried out by the subrecipient through an agreement but excludes operating public transportation services.

#### **National Transit Database (NTD)**

A reporting system that collects public transportation financial and operating information.

#### Nonprofit

An agency not operated exclusively for the promotion of social welfare in which no part of its net earnings benefit any private shareholder or individual. These agencies must comply with the requirements of Section 501(c)(3) or (4) of the United States Internal Revenue Code.

#### **Operating Expenses**

The costs directly related to system operation for the agency, by mode and type of service operated. Costs may include employee compensation, administration, fuel, oil, taxes, and maintenance expenses.

#### **Other Equipment**

Equipment other than passenger-service vehicles, maintenance facility, administrative office, park and rides, shelters, etc.

## Paratransit

Comparable transportation services required by the ADA for individuals who are unable to use fixed route transportation system. Examples include:

• To individuals that have special transportation needs

• By flexible forms of public transportation services that are not operated over a fixed route, and sometimes referred to as "demand response" or "dial a ride"

 To increase access to basic services such as education, medical appointments, and employment

## Passenger Trip

The number of passengers who board operational revenue vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

## Persons with Special Transportation Needs

Any individual who by reason of illness, injury, age, congenital malfunction or permanent or temporary incapacity of disability, is unable with without special facilities, special planning, or design to utilize mass transportation.

## **Public Transportation Service**

Operation of a vehicle that provides general or special service to the public on regular and continuing general or special transportation to the public.

## **Regional Transportation Planning Organization**

Regional organizations responsible for comprehensive transportation planning and programming in rural areas.

## **Replacement Equipment**

Capital assets such as vehicles, equipment and facilities acquired to replace similar equipment past their useful-life periods as designated by FTA, or because of accidents or defects.

## **Revenue Service (mile, hours and trips)**

The time when a vehicle is available to the public and there is an expectation of carrying passengers. Passengers either directly pay fares, are subsidized by public policy, or provide

payment through a contractual agreement. Vehicles operated in fare free service areas at during layover/recovery time are considered in review service. Revenue service excludes deadheading, vehicle maintenance testing, school bus service and charter service.

#### **Rolling Stock**

Transit vehicles such as buses, vans, and ferry boats.

#### **Route Conventional**

A type of transit service that operates as conventional fixed rout bus service along a fixed alignment with scheduled time points at each terminal point and key intermediate locations.

#### **Route Deviation**

A type of transit service that operates as conventional fixed route bus service along a fixed alignment or path with scheduled time points at each terminal point and key intermediate locations. Route deviation service is different than conventional fixed route bus service in that the bus may deviate from the route alignment to serve destinations within a prescribed distance of the route. Following an off-route deviation, the bus must return to the point on the route it left. Passengers may use the service in two ways:

- If they want to be taken off-route as part of a service deviation, they must tell the bus operator when boarding, or
- If they want to be picked up at an off-route location, they must call the transit system and request a pickup, and the dispatcher notifies the bus operator.

#### **Rural Area**

Incorporated and unincorporated communities and areas outside of a designated urbanized area.

#### **Rural Public Transit**

A transit provider with its administrative office in a rural area that operates principally in rural areas but can also operate in and return from urban areas.

#### Seniors

An individual who is 65 years of age or older (FTA Circular 9070.1G)

### Spare Status & Ratio

Operations require some number of spare vehicles in the event of breakdowns, maintenance needs or temporary surge operations. The total number of spare vehicles/rolling stock available for fixed route service has a 20% ratio.

## **Travel Training**

Training programs for individual users on awareness, knowledge, and skills of public and alternative transportation options available in their communities.

#### **Unlinked Passenger Trips (UPT)**

The number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use tot travel from their origin to their destination.

#### **Vehicle Hours/Miles**

The hours/miles that a vehicle is scheduled to or actually travels from the time it pulls out from the garage to go into revenue service to the time it pulls in from revenue service.

#### **Volunteer Drivers**

Individuals who drive vehicles in revenue service to transport passengers for the transit provider but is neither an employee of the transit provider nor compensated for their labor.

# **Appendix A - Using BlackCat**

### **Overview**

Please note the following section is for **existing subrecipient applicants only**, new and/or returning (not currently an active subrecipient) applicants will access application forms directly from NDOT Transit's web page (see section Application Steps on page 13). Returning applicants need to download application forms for the appropriate FTA program(s) in the <u>BlackCat</u> portal and complete project information forms for each project submitted. Once the application form is completed and all project information forms are submitted in <u>BlackCat</u>, the project application must be uploaded for final submission.

For information regarding this process, please refer to reference materials in the Help Menu in <u>BlackCat</u>. Please note that if you are submitting multiple projects, you must fill out multiple "Section 2" forms of the appropriate application. These must be uploaded individually, and if you have more than one project/Section 2 application form, you must upload them using the "add additional document" function. The following sections contain step-by-step instructions for creating applications and projects.



#### Contents

Applications	1
How to View an Application	1
Creating the Application	2
Adding Forms (Documents) to the Application	3
Designating Organization Access to the Application	5
Designating Application Review and Scoring Steps	7
Designating Application Ranking	
Deleting/Editing an Application	

## Applications

Applications allow the state user to create specific Applications by Functional Area, specify the appropriate forms/documents that are to be uploaded by the Organization, determine which Organizations can access the Application, and set up review and scoring parameters.

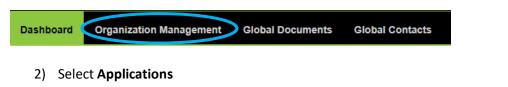
### How to View an Application

1) Select the **Application tab**, then select the application's name in the **Application Name** column.

Applications							
Add New							
A diation Mame	Fiscal Year	Application Status	Deadline Date/Deadline Time	Deadline Type(Hard/Soft)	Scoring Required	Edit/Delete	
FY24 5339	2024	Open	7/27/2023 4:00:00 PM	Soft	Yes	e 1	^
FY 2023 Application	2023	Open	8/5/2023 12:00:00 AM	Soft	Yes	c i	
All Steps	2023	Open	10/26/2023 12:00:00 AM	Soft	Yes	C Ó	
CW Test Application	2023	Open	2/22/2024 12:00:00 AM	Soft	Yes	ď 🛍	

#### Creating the Application

1) Select Organization Management



Dashboard Organizations Projects Applications Reports Contacts Oversight
--

#### 3) Select Add New

Application Title: Application Title: Application Year: Select Year Consc Application Status: 2 Open 2 Close Application Type: Select One Deadline Date: Select Date 2 Open 2 Close Application Type: Select One Consc Applications	570 O. 17						
Application Year: Select Year   Deadline Date: Select Date   Coar  Applications  Applications	Filter Options						
Applications	Application Title:	Title	Application Status:	🗹 Open 🛛 🗹 Close	Application Type:	Select One	
Applications	Application Year:	Select Year	Deadline Date:	Start Date	End Date		
	Clear						
Application Name Fiscal Year Application Status Deadline Date/Deadline Time Deadline Type(Hard/Soft) Scoring Required	Applications						
FY24 6339 2024 Open 7/27/2023 4:00:00 PM Soft Yes	Add New	Fiscal Year	Application Status	Deadline Date/Deadline Time	Deadline Type(Hard/Soft)	Scoring Required	Edit
	ne		Application Status Open	Deadline Date/Deadline Time 7/27/2023 4:00:00 PM	Deadline Type(Hard/Soft) Soft	Scoring Required Yes	Edit/D

4) Enter in all of the data and hit **Save** to create the application. Upon saving, tabs will populate on the side of the page which will be used moving forward in the development and management of the application.

Application Profile			Dashboard > Application > Application Profile
Profile			
Status:*	Open	~	
Application Title:*			
Application Fiscal Year:*	2023	~	
Functional Area:*	Select One	•	
Open Date/Time:*	6		
Deadline Date/Time:*	6		at Support center is only open during regular business hours and assistance is not available outside those hours. Please keep this in mind when
Hard/Soft Deadline:*	O Hard 🔍 Soft	choosing deadline	date and time.
Application Submittal Notification:	Select		
Save C col			

\*Note: The BlackCat Support center is only open during regular business hours and assistance is not available outside those hours. Please keep this in mind when choosing deadline date and time.

**Status** refers to whether the application opportunity is "live" or "published" for organizations to access and create an application. However, organizations will only be able to access applications within the **Open Date/Time** and **Deadline Date/Time**.

**Hard/Soft Deadline**: Hard Deadline indicates that NO application can be created OR submitted after the Deadline Date/Time. Soft Deadline indicates that NO application can be created after the Deadline Date/Time, however, any application created prior can still be submitted. If an application is submitted after a Soft Deadline, it will be identified as a 'Late Submission' during **Review and Scoring**.

**Application Submittal Notification** allows you to select what state/parent agency users are notified whenever an organization submits a new application. Multiple users can be added in this field.

Note: For a user's name to populate in this field, check off the **Parent Agency User** box in Administration > Users > Details and select the **Update** button at the top of the screen.

<b>BiackCat</b> Transit							BlackCat Panther   <u>MyAcount</u>   <u>Administration</u>	Log <u>Out</u>
Dashboard Organizations Projects Contracts	Applications Status Rep	porting Reviews/Scoring Fund Sources Report	ta Contacta Over	rsight				Ma
Clients	Users						Dashb	board > Admir
Users								5
Manage User Access Requests	Details Organizatio	ions & Permissions Functional Areas & Programs	Contact Information				Update	
Welcome Message	User Information			Syste	tem Credentials			
Budget Management	Client Name:	Mass DOT		User	r Name:	othole		
Scope Code Management	Prefix:	Mas.	~	Emai	ii:	cheryl:thole@b2gnow.com	Send Password Reset Email	
ALIMatch Management	First Name:	Charyl		🖬 Ai				
Compliance Management	Middle Name:				Parent Agency User			
Invoice Management	Last Name:	Thole		5 m	area Agency User			
Letter Management								

#### Adding Forms (Documents) to the Application

1) Select **Application Forms.** The Application Forms tab is used to attach documents that will be available for organizations to download and/or reupload while completing the application. The **Forms** table shows the current available forms attached to the application.

Bíack TRA											BlackCat Panther   M	Account   Administration	Log.Out   Help.M
Dashboard Organiz	zations	Projects	Contracts	Applications	Status Reporting	Reviews/Scoring	Fund Sources	Reports	Contacts	Oversight			Mass DO
Application Listing Application Profile			Applicati	ion Forms								Dashboard > Application	n > Application For
Application Forms Application Access			Forms	1									
Scoring Setup and App Reviewer Selection	plication		Add New Reorder	 ↑ ↓	Edit	Name Application Guidance					Required	Download Download	Delete
				<b>Λ</b> Ψ	ľ	Service Mode & Servic	e Area Description				Yes	Download	â

2) Select Add New to add a new form to the application.

orms					
Add New					
Reorder	Edit	Name	Required	Download	Delete
↑ ↓	Ľ	Application Guidance	No	Download	â
↑ ↓	Ľ	Service Mode & Service Area Description	Yes	Download	Ô
↑ ↓	ľ	Service Agreement	No	N/A	â

3) Complete the Form Title (name) and select **Save** to add the form to the application.

Add Application Form					
Form Title:					
Required:	O Yes 🔹 No				
File:	Browse				
Add Link? 🗆					
Save					

**Required** means that a document will need to be uploaded into this field before the application can be submitted. If this field is marked as 'No', then an uploaded form is not required. An example would be providing instructions or reference documents to be downloaded/used in assisting an organization in the application process.

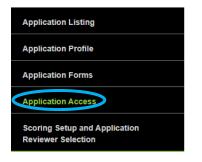
Select **Browse** to upload a document that will be available for organizations to download while completing the application. If this field is left blank, the form field will exist without any form to download. This would be useful if a document is required from the organization to upload but a template or example is not provided in the application.

4) In the Forms table, change the order of the forms but selecting the arrows under the **Reorder** column. Edit exisiting forms by selecting **Edit**. Download the form (if applicable) by selecting Download in the **Download** column and delete the form by selecting the trash can under the **Delete** column.

Dashboard > Application > Application Forms									
Forms									
Add New									
Reorder	Edit	Name	Required	Download	Delete				
↑ ↓		Application Guidance	No	Download		*			
$\wedge \downarrow$	ľ	Service Mode & Service Area Description	Yes	Download	â				
↑ ↓	ľ	Service Agreement	No	N/A	â				
						*			
Page 1	of 1 🕨 🕨	10 • items per page			1 - 3 of 3 items	Q			

#### Designating Organization Access to the Application

1) Select **Application Access**. This tab will display all active organizations and determine which organization will be able to access and submit an application once the Application Opportunity is open and within the designated deadline dates.



2) Select the organizations that need access to the application by checking of the box next to the name.

Application Listing Application Profile	Application Access	Dashboard > Application > Application Access
Application Forms	Access	
Application Access Scoring Setup and Application Reviewer Selection	Organization Legal Name: Organization Common Name/Acronym: Clear	Piter Organizations by Name         Helpful Hint: use the filter table at the top of pages to quickly narrow your search.
		Organization Name 128 West Transportation Council, Inc. 2Life Communities A Variave Line Inc. Active Day, Inc.
		Active MA, Inc.         Action Council on Aging         Active IdA aging         Adams Council on Aging

Note: This ties directly to the **Projects** tab when an organization is creating an application within a project. If an organization cannot see the application opportunity in the **Begin Application** picklist when creating a new application (pic below), confirm that they are selected in the **Application Access** as mentioned above.

ľ	[	Begin Application
of		Select One
	-	Select One
		5339 Funding Application
l		5311 Funding Application

#### 3) Select **Save** at the bottom of the page to save changes.

	Anear Community reader measure
	Agawam Council on Aging
	Age Center of Worcester Area, Inc.
	Alewife Transportation Management Association
	Alford Council on Aging
Organization Table Data	Alternatives Unlimited, Inc.
	Amego Inc.
	American National Red Cross - Pittsfield
	American Red Cross - Cape Cod Chapter
Save	•
Jave	

#### **Designating Application Review and Scoring Steps**

1) Select **Scoring Setup and Application Reviewer Selection.** This is where users can determine who will review application submissions and if/how scoring will be involved in the review process.



 Determine if scoring will be required by selecting Yes or No. If yes, select Add Step to create the first scoring step. Each Scoring Step acts as a level of review/approval for the application. Multiple scoring steps can be created for each application.

coring Setup and Application Reviewer Selection						
Application Scoring	plication Scoring					
Scoring Required:*	● Yes ◯ No					
Add Step	Add Step					
c., liane 1	Lead Reviewer	Group Scoring	Scorecard			
Test true true						
	Application Scoring Scoring Required.*	Scoring Required.*	Application Scoring Scoring Required.*  Add Step  Lead Reviewer Group Scoring			

3) Provide a name for this first scoring step and determine if Lead Reviewers will be required for this step by selecting Yes or No. Lead reviewers will act as single reviewers to approve/return the application after it has been submitted. Only one of the lead reviewer will be required to approve/return the application.

Designate a lead reviewer by highlighting their name and selecting the arrow to move them into the **Selected** box.

Scoring Step		
Step Name:*	First Review Step	
Lead Reviewer:	● Yes ○ No	
Select Lead Reviewers:	Available	Selected
	Elizabeth McCarthy Lauren Richmond Rachel Fichtenbaum	Cheryl Thole
Group Reviewer:	⊖ Yes ● No	
Save Close		

BlackCat Transit\_State\_Applications

Note: For a user's name to populate in the **Available** box as a lead reviewer, check off the **Lead Reviewer** in Administration > Users > Organizations and Permissions under the **Review/Scoring** section and select the **Update** button at the top of the screen.

Permissions Stata User - General V Apply Templete			Project Management Project Manager Project Manager Program Manager Sidect Al Permissions Usraket Al Permissions			
Organizations			Projects			
View Organizations	Edit Organizations	Add Organizations	View Projects Lock/Unlock Project	Add Projects	Z Edit Projects	
Line Item Budgets			Compliance			
View Requested	<ul> <li>View Allocated</li> <li>Edit Allocated</li> </ul>	<ul> <li>✓ View Comments</li> <li>✓ Edit Comments</li> </ul>	<ul> <li>View Milestones</li> <li>Add/Edit Milestones</li> </ul>	<ul> <li>Update Milestones</li> <li>Delete Milestones</li> </ul>	<ul> <li>DeleteUpload</li> <li>Add Milestone Sections</li> </ul>	
View Summary			Duplicate Milestone Sections	View Compliance	Delete Milestone Sections	
			Add Deleted Milestone Section	Create/Edit Compliance	Receive Compliance Notifications	
Applications			Review /Scoring			
View Applications	Edit Applications	Create Applications	Lead Reviewer	Group Reviewer	Application Ranking Reviewer	
Submit Applications	Lock Confidential Application Documents	View Confidential Application Documents	wanagement Ranking Reviewer			
<ul> <li>Delete Application Documents</li> </ul>						

4) Determine if Group Reviewers will be required for this step by selecting Yes or No next to Group Reviewer. Group Reviewers will need to reach a consensus for the application to move forward or be returned. Similar to the Lead Reviewers, designate the Group Reviewers by highlighting the names and selecting the arrow to move them to the Selected box.

Step Name:*	First Review Step			
Lead Reviewer:	● Yes ◯ No			
Select Lead Reviewers:	Available	Available Selected		
	Cheryl Thole Elizabeth McCarthy			
	Lauren Richmond Rachel Fichtenbaum	-		
	Kachel Fichlenbaum	-4		
		**		
		-44		
Group Reviewer: Select Group Reviewers:	• Yes No Avanable		Selected	
	Elizabeth McCarthy		Cheryl Thole	
			Lauren Richmond	
		•		
		4		
		*		
		44		
How will Group Reviewers be Assigned ?:	Use ALL Selected Group F	leviewers		
	Select subset of Selected	Group Re	eviewers in Scoring Assignments	
Score Card:	Select Scorecard		•	
Save Close				

Note: Similar to the Lead Reviewer, for a user's name to populate in the **Available** box as a group reviewer, check off **Group Reviewer** in Administration > Users > Organizations and Permissions under the **Review/Scoring** section and select the **Update** button at the top of the screen.

Permissions           State User - General         V         Apply Template			Project Management			
			Project Manager			
			Program Manager			
			Select All Permissions Unselect All Permissions	Select All Permissions Unselect All Permissions		
Organizations			Projects			
View Organizations	Edit Organizations	Add Organizations	<ul> <li>View Projects</li> <li>Lock/Unlock Project</li> </ul>	Add Projects	Z Edit Projects	
Line Item Budgets			Compliance			
View Requested	View Allocated	View Comments	View Milestones	Update Milestones	DeleteUpload	
Edit Requested	Edit Allocated	Edit Comments	Add/Edit Milestones	Delete Milestones	Add Milestone Sections	
View Summary			Duplicate Milestone Sections	View Compliance	Delete Milestone Sections	
			Add Deleted Milestone Section	Create/Edit Compliance	Receive Compliance Notifications	
Applications			Review /Scoring			
View Applications	Edit Applications	Create Applications	Lead Reviewer	Group Reviewer	Application Ranking Reviewer	
Submit Applications	Lock Confidential Application Documents	View Confidential Application Documents	Management Ranking Reviewer			
<ul> <li>Delete Application Documents</li> </ul>						

5) Determine how Group Reviewers will be assigned by selecting either Use ALL Selected Group Reviewers or Select subset of Selected Group Reviewers in Scoring Assignments. The Subset option allows you to individually assign different users per application; whereas the Use ALL Selected auto-assigns the group reviewers chosen to all applications by default

Scoring Step						
Step Name:*	Group Scoring	Group Scoring				
Lead Reviewer:	🔿 Yes 🖲 No	○ Yes ● No				
Group Reviewer:	● Yes ○ No	● Yes ○ No				
Select Group Reviewers:	Available	Selected				
		Monte Meier Rachel Pallister				
How will Group Reviewers be Assigned?:	<ul> <li>Use ALL Selected Gi</li> <li>Select subset of Select</li> </ul>	oup Reviewers ected Group Reviewers in Scoring Assignments				
Score Card:	Group Scoring					

6) Group Reviewers can utilize a scorecard built within BlackCat by selecting the **Score Card** picklist. This tool can be used to reach a group consensus on whether the application should move forward or be returned. Steps on how to fill out the scorecards can be found in the **Review and Scoring** section of the user guide.

Scoring Step				
Step Name:*	First Review Step			
Lead Reviewer:	• Yes O No			
Select Lead Reviewers:	Available		Selected	
	Elizabeth McCarthy Lauren Richmond		Cheryl Thole	
	Rachel Fichtenbaum	•		
		*		
Group Reviewer:	● Yes ○ No			
Select Group Reviewers:	Available		Selected	
	Elizabeth McCarthy		Cheryl Thole	
			Lauren Richmond	
		►		
		-		
		*		
		•		
How will Group Reviewers be Assigned?:	Use ALL Selected Group Revie	ewers		
			viewers in section Assignments	
Score Card:	Select Scorecard			
· (	Select Scorecard			
Save Close	5311 Funding Scorecard			
	5339 Funding Scorecard	_		

7) Select **Save** at the bottom of the window to save the Scoring Step. Add as many Scoring Steps as desired.

	Scoring Step					
ie	Step Name:*	First Review Step				
	Select Lead Reviewers:	Available		Selected		
		Elicabeth McCarthy Lauren Richmond Rachel Fichtenbaum	+ + *	Cheryl Thole		
L	Group Reviewer:	● Yes 〇 No				
L	Select Group Reviewers:	Available		Selected		
		Elizabeth McCarthy	4 4 4	Charyl Thole Lauren Richmond		
l	How will Group Reviewers be Assigned?:	O Use ALL Selected Group Reviewers				
		Select subset of Selected Group Reviewers in Scoring Assignments     Select Scorecard				
	Score Card:					
k	Save Close					

#### **Designating Application Ranking**

 Applications can be ranked through the Application Ranking and Management Ranking sections within Scoring Setup and Application Reviewer Selection tab. <u>The following steps apply to both</u> <u>ranking sections.</u> Select Yes or No to designate if either Application or Management Ranking will be required.

Application Listing	Scoring Setup and Application Reviewer Selection		
Application Profile			
Application Forms	Application Scoring		
Application Access	Scoring Required:*	○ Yes ● No	
Scoring Setup and Application Reviewer Selection			
	Application Ranking	_	
	Application Ranking Required:*	<b>→</b> ₂s ∩ No	
	How will applications be ranked?:	● By Project ○ By Budget	
	Select Application Ranking Reviewers:	Available Selected	
		Cheryl Thole	
		Lauren Richmond	
		Rachel Fichtenbaum	
		•	
		44	
		Save	
	Management Ranking		
	Management Ranking Required:*	<b>O</b> s ₀ No	
	How will applications be ranked?:	By Project      By Budget	
	Select Management Ranking Reviewers:	Available Selected	
		Cheryl Thole	
		Lauren Richmond	
		Rachel Fichtenbaum	
		4	
		>>	
		44	
		Save	
		Save	

2) Applications can be displayed/ranked **By Project** (grouping of budgets) or **By Budget** (individual budgets).

Application Ranking	
Application Ranking Required:* How will applications be ranked?: Select Application Ranking Reviewers:	Yes O No     By Project O By Budget     Available Selected
	Cheryl Thole Lauren Richmond   Rachel Fichtenbaum    Rachel Fichtenbaum
	Save

3) Designate the Application and/or Management Ranking Users by highlighting the names and selecting the arrow to move them to the **Selected** box.

® Yes ○ No	
By Project O By Budget	
Available Selected	
Cheryl Thole Rachel Fichtenbaum	
Lauren Richmond	
44	
Save	
● Yes ○ No	
By Project O By Budget	
Available Selected	
Cheryl Thole Lauren Richmond	
Rachel Fichtenbaum	
•	
Save	
	<ul> <li>By Project O By Budget</li> <li>Chard Table Exclusion</li> <li>Burlen Richmond</li> <li>By Project O By Budget</li> <li>Chard Fichtenbaum</li> <li>By Project O By Budget</li> <li>Chard Fichtenbaum</li> <li>Chard Fichtenbaum</li></ul>

Note: For a user's name to populate in the **Available** box as an Application Ranking Reviewer or a Management Ranking Reviewer, check off **Application Ranking Reviewer** or **Management Ranking Reviewer** in Administration > Users > Organizations and Permissions under the **Review/Scoring** section and select the **Update** button at the top of the screen.

Users								
Details Organizations & Permission	Functional Areas & Programs	Contact Information					Update	Cancel
Organizations								
Filter By:								
Select One	•	Select Field			•			
ABC123		*	»	128 West Transportation	Council, Inc.	*		
			>	2Life Communities A Yankee Line Inc. Active Day, Inc.				
				Active MA, Inc. Acton Council on Aging				
			<	Acushnet Council on Ag Adams Council on Aging	na			
			<<	AdLib, Inc. AECOM TECHNICAL SI African Community Heal	ERVICES INC			
		*		Agawam Council on Agi Age Center of Worceste Alewife Transportation N Alford Council on Aging Ahematives Unlimited, li American National Red I American National Red American Training Inc.	ng Area, Inc. Ianagement Association ic. Dross - Pittsfield Jane Cott Charter	Ţ		
Permissions				A	Project Management			
State User - General	✓ Apply Template				Project Manager			
					Program Manager			
					Select All Permissions Unselect All Permissions			
Organizations					Projects			
View Organizations	<ul> <li>Edit Organizations</li> </ul>		Add Organizations		View Projects	Add Projects	Z Edit Projects	
					Lock/Unlock Project			
Line Item Budgets					Compliance			
View Requested	View Allocated		View Comments		View Milestones	Update Milestones	DeleteUpload	
Edit Requested	Edit Allocated		Edit Comments		Add/Edit Milestones	Delete Milestones	Add Milestone Sections	
View Summary					<ul> <li>Duplicate Milestone Sections</li> </ul>	View Compliance	Delete Milestone Sections	
					Add Deleted Milestone Section	Create/Edit Compliance	Receive Compliance Notifications	
Applications					Review /Scoring			
View Applications	<ul> <li>Edit Applications</li> </ul>		Create Applications		C Lead Reviewer	Group Reviewer	Application Ranking Reviewer	>
Submit Applications	<ul> <li>Lock Confidential Application</li> </ul>		View Confidential Application	n Documents	Management Ranking Reviewer			-
<ul> <li>Delete Application Documents</li> </ul>								

4) Save the Application and/or Management Ranking by selecting **Save** at the bottom of the screen.

Application Ranking	
Application Ranking Required:* How will applications be ranked?: Select Application Ranking Reviewers:	<ul> <li>Yes No</li> <li>By Project By Budget</li> <li>Available</li> <li>Cheryl Thole</li> <li>Lauren Richmond</li> <li>+</li> <li>+</li></ul>
	Save

#### Deleting/Editing an Application

 To edit, navigate to the Applications tab on the top and select the Pencil icon under the Edit/Delete column of the application listing. Select Save at the bottom of the window after changes are made. 2) To delete, navigate to the **Applications** tab on the top and select the **Trashcan** icon under the **Edit/Delete** column of the application listing. Select **Yes** when asked to confirm.

Applications						
Add New						
Application Name	Fiscal Year	Application Status	Deadline Date/Deadline Time	Deadline Type(Hard/Soft)	Scoring Required	Edit/Delete
FY24 5339	2024	Open	7/27/2023 4:00:00 PM	Soft	Yes	< C
FY 2023 Application	2023	Open	8/5/2023 12:00:00 AM	Soft	Yes	2 1
All Steps	2023	Open	10/26/2023 12:00:00 AM	Soft	Yes	C 🛈
CW Test Application	2023	Open	2/22/2024 12:00:00 AM	Soft	Yes	2



## Contents

Projects	1
How to Access Projects	1
How to Create a Project	2
How to Add a Project Funding Request	ô

## **Projects**

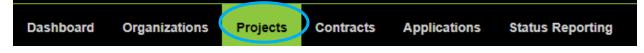
The Project section includes project data. Both Organization and State users have access to add and edit project information for any Organizations assigned under user permissions.

#### How to Access Projects

1) Select Organizations

	Dashboard	Organizations	Projects	Contracts	Applications	Status Reporting
--	-----------	---------------	----------	-----------	--------------	------------------

2) The Organizations Management navigation will now display, and you will automatically land on the Organizations tab. Select **Projects** 



 Perform a search to query specific projects. To view all organization projects and not just the projects associated with the organization shown in the dropdown, check the box for Show ALL Organization's Projects.

Project Listing		128	8 West Transportation Council, Inc.
Filtering Options  Show ALL Organization's Projects Search by Project Title Search by Application Type Clear	Select Status Select Functional Area	Select Project Manager	Helpful Hint: Select the options you would like to search by or Search by the Organization Name.

#### How to Create a Project

Projects contain at least one budget; for transit, a budget is the equivalent of one ALI. In determining your projects and budgets, please note:

- It is suggested the state inform the subrecipients how to name the Projects, e.g. SFY XX Program 5339 prior to the opening of an application opportunity to assist in data management.
- Budgets should be grouped in a project based on the application opportunity they will be submitted under.
  - Budgets may be grouped in projects based on a program (5339/5310/5311/5304/5303)
- While all budgets within a project will be submitted under one application, the budgets do not need to be on the same contract once budgets advance through the process.
- If your POP report displays a unique line for each vehicle, then a budget should be created for each vehicle (not one budget for five vehicles).

Project Listing							
Filtering Options							
Show ALL Organization's Projects							
Search by Project Title	Select Status	Select Project I					
Search by Application Type	Select Functional Area	•					
Select Organization	Select County	▼ Select District/					
Clear							
Project Listing							
Add New							

#### 1) Select Add New

2) Complete all required fields and select **Save**. Once saved, the record is created and the user is now on the project's Project Details page (menu on the left).

Organization Legal Name:	128 West Transportation Council, Inc.
Functional Area:*	Select One 🔻
Project Title:*	
Project Category/Type of Work:	Select One v
Total Project Cost:*	\$0.00
Scope of Work:*	
Justification:*	
Project Status:	
Agency Project/Grant Number:	
Project Manager:	Select One v
Program Manager:	Select One v
Other Notification Contacts:	Select One
Save	

3) Add Project Funding/Budgets by selecting the **Project Funding** page on the left



#### 4) Select Add New

Project Summary						
Project Overview						
User Guide Example			Total Proje	ct Cost:	\$0.00	С
			Net Project	t Cost:	\$0.00	L
Agency Project Number: Locked:	_		Requested	:	\$0.00	
Project Manager:			Allocated:		\$0.00	
Project Status:	Project Created		Encumbere	ed:	\$0.00	
Project Status.	Project Created		Recovered Funds:		\$0.00	
			Funds:			
	Requested			Alloca	ated	
Budgets						
Add New						
Actions Year Pro	ject Budget Template	Budget Name	Budget ID	Requested Amount	Allocated Amou	Int
	15 🔹 items per pa	age				

5) Compete all required fields and select Save. Please note, the Budget Profile determines which ALIs (Activity Line Item codes) populate in the ALI pick list. Add as many budgets as necessary.

3	Budget	
ects Contracts Applications Stat	Budget Name:* Fiscal Year:* Budget Profile:* Ali:* Scope Code:*	Select One   Select One  Select One
Project Overview User Guide Example Agency Project Number: Locked: Project Manager:	Note: Project Phase: Program Code:	Select One
Project Status: Project Cre	S. TRE Close	
Requested		Allocated

			Requested			Alloc	ated			Cor	nments	
Bud	gets											
Add	New											
Acti	ons	Year	Project Budget Template	Budget Name	Budget ID	Requested Amount	Allocated Amount	Budget Code/ALI	Scope Code	Notes	Project Phase	Program Code
C	8 🖻	2024	Capital	Expansion Van	BID0000004	\$60,000.00	\$0.00	11.13.15-Buy Van For Svc Expansion	111-00-Bus Rolling Stock			
٢	1	2024	Capital	Computers	BID0000005	\$10,000.00	\$10,000.00	13.42.07-Purchase - Computer Hardware	134-00-New Start Support Equip / Facilities			
ľ	2 🗓	2024	Capital	Main St. Facility	BID000006	\$430,000.00	\$100,000.00	11.34.01- Rehab/Renovate - Bus Terminal	113-00-Bus Stations/ Stops / Terminals			
C	î 🗇	2024	Capital	Rehab Van	BID000007	\$10,000.00	\$50,000.00	11.14.15- Rehab/Rebuild Van	111-00-Bus Rolling Stock			
۵	î 🛈	2024	Safety	Training	BID0000013	\$0.00	\$12,000.00	57.10.04-Training	571-00-Safety (HQ)			
۵	2 🖻	2024	Capital	Number 3	BID000038	\$20,000.00	\$0.00	11.34.01- Rehab/Renovate - Bus Terminal	113-00-Bus Stations/ Stops / Terminals			

### How to Add a Project Funding Request

A budget must have funding associated with it in order to submit it in response to an application.

1) Once inside the correct project, select Project Funding

Project Listing
Project Details
Project Funding
Compliance

2) Select the Project Budget that needs to have funding added from the Budgets table.

Project Over	view		
SFY 24 5311			Τα
Agency Project	Number:		N
Locked:			R
Project Manage	er:		A
Project Status:	Project C	reated	R
	Request	ed	
Budgets			
Add New			
Actions	Year Project Budget Tem	olate Budget N	ame Budget ID
ピ 巾	2024 Operating 5310	Operating	5310 BID0000118
M 4 1	▶ ► 15 ▼ items	per page	

3) Fill out the budget by entering data in the Value field(s), as applicable. Scroll to the bottom of the page and select **Save**.

Please note: Budgets may look different than what is in the screenshot below. Some budgets may have only one line item to enter a value; other projects may have multiple lines to enters expenses and/or revenues.

Project Overview							
SFY 24 5311 Agency Project Number: Locked: Project Manager: Project Status:	Project Created		Total Project Cost: Net Project Cost: Requested: Allocated: Encumbered: Recovered Funds:	\$507,000.00 \$497,000.00 \$497,000.00 \$0.00 \$0.00 \$0.00	Created By: Last Modified By:		inther on 6/30/2023 at 3:45 PM
Project Budget Items - Ope	erating 5310						
LABOR							
Code		ltem					Value
501.01		Operators' Salaries and Wage	5			(	\$500,000.00
501.02		Other Salaries and Wages					

4) Scroll down the page to the Funding Breakdown section.

Source	Amount	Percent	Actions
5310 Operating	\$248,500.00	50.00 %	C 🗓
Local monies	\$248,500.00	50.00 %	<b>2 1</b>
	5310 Operating	5310 Operating \$248,500.00	5310 Operating \$248,500,00 50.00 %

5) Add the funding request, and all related funding splits (include local monies). Select **Add new record**, choose a Funding Type, enter the Source, enter an amount, and Save using the save icon. Repeat these steps as necessary. If a line needs to be modified, select the Edit icon.

Add new record	Source	Amount	Percent	Actions
Select One				
ederal	5310 Operating	\$248,500.00	50.00 %	C D
cal	Local monies	\$248,500.00	50.00 %	C 🛍