



**NORTH CAROLINA**

Department of Transportation

# **Local Projects – STIP, Funding & Schedule, Agreements, Project Delivery and EBS**

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Connecting people, products and places safely and efficiently with customer focus, accountability and environmental sensitivity to enhance the economy and vitality of North Carolina

# Overview of Presentation

- STIP, Funding & Schedules
- FHWA's Role & Guidelines
- Resources
- Agreements
- Local Project Delivery
- EBS Portal

## TIP Process

- Amendments require Executive Board (TPO) action (2-4 Months)
  - Add or delete a project
  - Change in design or scope, such as termini, number of lanes, etc.
  - Add or substantially modify a phase of work
  - Change in cost
  - Change in schedule
- Modifications that require administrative approval
  - Minor change in funding amount
  - Use different source of funds
  - Small changes in project scope

## STIP Changes\*

- Revisions require Board of Transportation (BOT) action + additional 2-3 Months
  - Change Fiscal Year in which \$\$ to be authorized
  - Add (or modify) a phase of work
- Cases NOT requiring BOT action
  - Minor change in funding amount
  - Use different source of funds

**\*\*\*IF LAPP FUNDS INVOLVED, TPO MUST REVIEW AND CONCUR\*\*\***

## STIP Schedules & Funding

- When requesting your project make sure you have a realistic schedule.
  - Meaning all 4 phases should not be programmed in the same Federal Fiscal Year.
- Consider your scope and location to determine your schedule and funding.
- Ask for insight from LPMO or Division to assist with schedule or funding.
  - Later in presentation, Raymond is going to show you some tools to assist on identifying costs.

**\*\*\*FEDERAL FISCAL YEAR\*\*\***

**STARTS OCTOBER 1 AND ENDS SEPTEMBER 30**

## What Makes A Good Project

### SCHEDULE

- Consider the location of your project
- Consider 3-4 months getting agreement
- Hiring PEF to start design
- How many parcels
- Any utility poles
- Allow a year for each phase when scheduling in STIP

### SCOPE

- Make sure STIP scope reflects the location of Project
- Don't over commit on your scope (length, location)
- Include the beginning and end points

### BUDGET

- Be prepared for the unexpected
- Overhead costs
- Breakdown each phase for costs
- DOT charges



## WHAT DOES A GOOD SCHEDULE LOOK LIKE IN THE STIP?

ROUTE/CITY	LOCATION DESCRIPTION	FUND SOURCE	ACTIVITY	TOTAL FUNDED (MAY INCLUDE PREVIOUSLY AUTHORIZED FUNDS)	FY 2026	FY 2027	FY 2028
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	L(M)	ENGINEERING	\$ 3,000			
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	BGDA	RIGHT-OF-WAY	\$ 10,000	\$ 10,000		
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	L(M)	RIGHT-OF-WAY	\$ 3,000	\$ 3,000		
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	BGDA	UTILITIES	\$ 10,000	\$ 10,000		
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	L(M)	UTILITIES	\$ 3,000	\$ 3,000		
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	BGDA	CONSTRUCTION	\$ 1,180,000		\$ 1,180,000	
Sullivantown Road	Intersection of US 311; SR 2004 (Main Street) and US 311 (Harley Drive)	L(M)	CONSTRUCTION	\$ 295,000		\$ 295,000	

FEDERAL FISCAL YEAR IS OCTOBER 1 TO SEPTEMBER 30

## FHWA'S Role

- Provide Federal funding for your project
- Ensure Federal dollars are spent appropriately
- Ensure there is no fraud, waste, and/or abuse
- Ensure the recipients have a good project
- Ensure that recipients have every opportunity to keep every dollar of their Federal funds

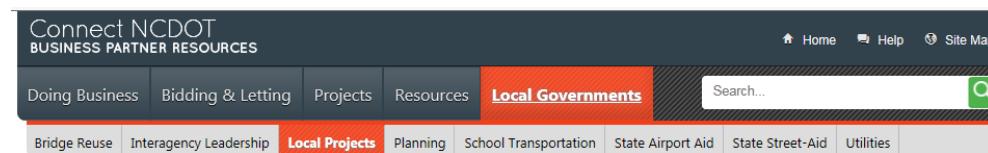
## FHWA'S Guidelines

- Remember once your funding is authorized for a phase of work, that starts the clock with FHWA.
- You must submit a claim for FHWA every 6 months to know there is activity progressing on your project.
- Period of Performance – NCDOT allows up to five years for completion of project. Completing project doesn't mean complete construction. Completion means to complete all construction activities, acceptance of the project, and submission of a final reimbursement package to the Department.

# LPMO Website

<https://connect.ncdot.gov/municipalities/Funding/Pages/default.aspx>

- The Department has a website for internal and external customers to utilize for information.
- Do a search for Connect NCDOT
- For Local Projects, click on the “Local Governments” tab, then the “Local Projects” tab.
- The website provides resources and links to other funding areas, project guidance, templates and forms.



## Local Programs

Information on Municipal and Developer Agreements and Locally Administered Projects

◀ ► Connect NCDOT ► Local Governments ► Local Programs

### Local Programs Management Office (LPMO)

The LPMO is a central office that oversees the creation, delivery, and execution of Municipal and Developer agreements that are requested by NCDOT Business units, Division Offices, or other NCDOT personnel and are connected to the development, construction, and operation of transportation projects.

The LPMO also provides oversight and guidance to locally developed and delivered projects that NCDOT reimburses with Federal and/or State funds. The LPMO assists with and provides standards for successful administration and close-out of projects.

### Forms and Templates

Forms and Templates have been moved to the [Local Project Delivery Resources](#) page

### LPMO Customer Service Survey

Your feedback is essential in making the

# LPMO Website

## 2025 Local Projects Webinar

DATE	SESSION	VIDEO RECORDING	POWERPOINT PRESENTATION
1/29/2025	Requesting Local Project Agreement In EBS Portal	<a href="#">Video Recording</a>	<a href="#">PowerPoint Presentation</a>
2/26/2025	Federal Grants 101	<a href="#">Video Recording</a>	<a href="#">PowerPoint Presentation</a>
3/26/2025	Toll Credit Pilot Program	<a href="#">Video Recording</a>	<a href="#">PowerPoint Presentation</a>
4/30/2025	Changes to EBS and Use of NCID	<a href="#">Video Recording</a>	N/A
5/28/2025	Material Certification	<a href="#">Video Recording</a>	<a href="#">Power Point Presentation</a>
6/25/2025	Budgeting Tools	<a href="#">Video Recording</a>	N/A
7/30/2025	FHWA 1391 Reporting	<a href="#">Video Recording</a>	<a href="#">PowerPoint Presentation</a>
10/01/2025	FIORI Helpful Hints	<a href="#">Video Recording</a>	<a href="#">PowerPoint Presentation</a>

Letter from LGA Accepting Project from Contractor



Letter from LGA Requesting Concurrence - Construction



FFATA Subrecipient Form



RFLOI Form for LGA



LPMO Security Form.pdf



Letter from LGA Requesting Reimbursement



Letter from LGA Requesting Reimbursement



Reimbursement Tracking worksheet.xlsx



## PROGRAM LINKS

[Municipal Bridge](#)

[Congestion Mitigation & Air Quality \(CMAQ\)](#)

[Bicycle & Pedestrian](#)

[Safe Routes to School](#)

# AGREEMENT



## When to Request for an Agreement?

- When your Project has a STIP number and is programmed in the STIP.
- When you obtain the STIP number, the eligible phases and years programmed from your Transportation Planning Organization (TPO).
- Your request will need to include contact information, project scope and name, funding source and amounts, and a schedule of major milestones.
- Enter the request for an agreement through the EBS - FIORI for Locally Administered Projects (LAPs).

## Agreement

- Cannot be initiated until funding is programmed in the STIP in correct year.
- Executed between NCDOT and the Local Governmental Agency.
- Includes provisions that LGA must comply with in order to receive reimbursement.
- Includes scope of work, funding, time frames, and responsibilities.

Funding Authorizations cannot occur until a fully executed Agreement is in place.

# Locally Administered Agreement

Example of Agreement:

NORTH CAROLINA		LOCALLY ADMINISTERED PROJECT - FEDERAL	
[SELECT COUNTY] COUNTY		DATE: 2/8/2019	
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION		TIP #: _____	
AND		WBS Elements:	PE _____
			ROW _____
			CON _____
		OTHER FUNDING: _____	
		FEDERAL-AID NUMBER: _____	
		CFDA #: 20.205	
		Total Funds [NCDOT Participation] \$ _____	
<p>THIS AGREEMENT is made and entered into on the last date executed below, by and between the North Carolina Department of Transportation, an agency of the State of North Carolina, hereinafter referred to as the "Department" and the _____, hereinafter referred to as the _____.</p> <p><b>WITNESSETH:</b></p> <p>WHEREAS, Fixing America's Surface Transportation (FAST) Act allows for the allocation of _____ funds to be available for certain specified transportation activities; and,</p> <p>WHEREAS, the _____ has requested federal funding for _____, hereinafter referred to as the Project, in [Select County] County, North Carolina; and,</p> <p>WHEREAS, subject to the availability of federal funds, the _____ has been designated as a recipient to receive funds allocated to the Department by the Federal Highway Administration (FHWA) up to and not to exceed the maximum award amount of \$ _____ for the Project; and,</p> <p>WHEREAS, the Department has agreed to administer the disbursement of said funds on behalf of FHWA to the _____ for the Project in accordance with the Project scope of work and in accordance with the provisions set out in this Agreement; and,</p> <p>WHEREAS, the Department has programmed funding in the approved Transportation Improvement Program for the Project; and,</p> <p>WHEREAS, the governing board of the _____ has agreed to participate in certain costs and to assume certain responsibilities in the manner and to the extent as hereinafter set out; and,</p>			
<p>Agreement ID # _____</p> <p>1</p>			

IN WITNESS WHEREOF, this Agreement has been executed, in duplicate, the day and year hereunto set out, on the part of the Department and the Municipality by authority duly given.

L.S. ATTEST:	TOWN OF GARNER
BY: _____	BY: _____
TITLE: _____	TITLE: _____
DATE: _____	
<p>NCGS 133-32 and Executive Order 24 prohibit the offer to, or acceptance by, any State Employee of any gift from anyone with a contract with the State, or from any person seeking to do business with the State. By execution of any response in this procurement, you attest, for your entire organization and its employees or agents, that you are not aware that any such gift has been offered, accepted, or promised by any employees of your organization.</p> <p>This Agreement has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.</p>	
(SEAL)	(FINANCE OFFICER)
Federal Tax Identification Number _____	
Town of Garner _____	
Remittance Address: _____	
DEPARTMENT OF TRANSPORTATION	
BY: _____	
(CHIEF ENGINEER)	
DATE: _____	
APPROVED BY BOARD OF TRANSPORTATION ITEM #: _____ (Date)	

# LOCAL PROJECT DELIVERY



# Typical Project Delivery Steps

## Agreement

### -----Preliminary Engineering Authorization-----

- *Procure Professional Services*

## Environmental Document (required)

### ROW Plans (required)

### -----Right of Way Authorization-----

### -----Utility Authorization-----

- *Acquire Right of Way*
  - *Relocate Utilities*

## Right of Way/Utility/RR Certification (required)

## Final Plans, Contract Proposal and Estimate (PS&E) (required)

### -----Construction Authorization-----

- *Advertise and Let Construction Contract*
  - *Construct & Administer Contract*

## Final Inspection (required)

- *Final Reimbursement*

## Funding Authorization

For every phase that is eligible for reimbursement, the LGA must request funding authorization by submitting a Change Request in the Local Project System (EBS).

- PE: Preliminary Engineering – pays for professional engineering services, and other preconstruction activities.
- ROW: Right of Way – pays for costs of acquiring ROW, appraisals and other ROW associated costs.
- UTIL: Utility Relocation – pays for relocating utilities.
- CON: Construction – pays for the construction contract, construction engineering and inspection (CEI), and contract administration.
- OTHER – this is used for phases of work not related to a construction project, such as delivering a program, purchase of equipment, and other non-construction activities.

## Funding Authorization

- Refer to the chart to show when funding authorization may be requested for each phase.
- Note deliverables that are needed prior to requesting funding authorization.
- Funding authorization starts the clock with FHWA.

## NCDOT will use your funding

- Even if the LGA is not receiving funding for a certain phase of work, the funding is still available for NCDOT to authorize and utilize for the review of plans, appraisals, certification package, proposal, etc.
- The LGA is responsible for the non-federal match on any DOT charges.
- The LGA is responsible for any costs that exceed the available funding.

## Professional Engineering firm (PEF) Services

- Notification from LPMO your PE Funding has been Authorized.
- Process for hiring PE – Professional Engineering Firm

## Typical Project Delivery Steps

### Agreement

-----Preliminary Engineering Authorization-----

- *Procure Professional Services*

# Professional Services

## Three Ways to Obtain Services for Engineering



Procurement of Professional Services for a Project-Specific contract

Procurement of an ON-CALL Contract

Work done by In-House staff

## Initiating the PE Phase

If PE funding is an eligible phase of work, then after Agreement is executed and PE funding is authorized by FHWA. LGA will:

1. Request to advertise an RFLOI for a project specific contract, on-call or submit a request to use in-house staff. Use template on website for advertisements. Submit in EBS.
2. Interview, score and make PEF selection. Submit in EBS.
3. Ask PEF to complete rates, manday estimate. Use worksheet on website.
4. Review costs with selected firm and submit in EBS.
5. Once approved by NCDOT, prepare a contract between selected firm and LGA. Submit in EBS.

## Professional Services Must.....

- All professional services procurement must be in accordance with 23 CFR 172.
- LGA must have their own written procedures, or they can comply with NCDOT's Policies and Procedures for Procurement and Administration of Major Professional or Specialized Services Contracts.

## Rules of Thumb

- If we're (NCDOT) paying for it, we want to know about it up front. NCDOT must review proposed costs before the LGA incurs them
- All procurement must be competitive
- No advertisement prior to funding authorization; however, in some cases, advertisement may occur prior to funding authorization. Check with LPMO for exceptions.

# Environmental Document

## Typical Project Delivery Steps

### Agreement

### -----Preliminary Engineering Authorization-----

- *Procure Professional Services*

**Environmental Document (required)**

## Environmental Document

- Must be in conformance with NEPA – National Environmental Policy Act
- Must comply with other Federal environmental laws
- Most projects qualify as a Categorical Exclusion (CE) Document

To authorize either ROW funds or Construction funds, we must have a completed environmental document not more than one year old.

# Right of Way / Utilities / RR Certifications

## Typical Project Delivery Steps

### Agreement

#### -----Preliminary Engineering Authorization-----

- *Procure Professional Services*

#### Environmental Document (required)

#### ROW Plans (required)

#### -----Right of Way Authorization-----

#### -----Utility Authorization-----

- *Acquire Right of Way*
- *Relocate Utilities*

#### Right of Way/Utility/RR Certification (required)

## Right of Way

- Any kind of ROW, whether it's acquisition in fee simple, or you're entering into an easement (temporary or permanent), or an encroachment, must be properly documented and then certified.
- All acquisition must be in conformance with the “Uniform Act,” whether ROW Acquisition is being reimbursed with Federal funds or not.
- Appraisals must be reviewed by NCDOT, even if ROW is not an eligible expense; NCDOT will provide a concurrence in “just compensation”.

If ROW is an eligible phase, ROW Funding must be authorized prior to acquiring ROW

## Right of Way Appraisals

### Appraisals

- Three Options:
  - Narrative
  - ROW Transmittal Summary
  - Waiver Valuations
- Performed by DOT approved appraiser
- Appraisals must be reviewed
- Limited Pool of Appraisers

## Utility Relocation

- All utilities should be cleared from the Project Area, prior to moving into construction, unless utility relocation is a part of the construction contract.
- Costs for third-party utility providers to relocate utilities must be reviewed by NCDOT before LGA enters into contract.
- Be aware of the length of time for utility relocation and potential costs.

## Right of Way / Utility / RR Certification

Certification ensures that LGA has control of all ROW needed for project and the ROW is clear from all obstructions.

- Either the LGA owns outright or has a lease, easement, or other legal document to control ROW.
- Certification should also address any utility or railroad conflicts:
  - Utilities should be relocated out of the project area; or,
  - Utility relocation should be included in the construction contract; and,
  - Any RR conflicts must be documented with agreements/approval from RR to encroach on their property.

# Contract Proposal and Estimate

## Typical Project Delivery Steps

### Agreement

#### -----Preliminary Engineering Authorization-----

- *Procure Professional Services*

### Environmental Document (required)

### ROW Plans (required)

#### -----Right of Way Authorization-----

#### -----Utility Authorization-----

- *Acquire Right of Way*
- *Relocate Utilities*

### Right of Way/Utility/RR Certification (required)

### Final Plans, Contract Proposal and Estimate (PS&E) (required)

## Contract Proposal and Estimate

- Contract Proposal is prepared in accordance with the 2024 North Carolina Standard Specifications for Roads and Structures
- Proposal will include federal provisions that will be part of the contract
- The engineer's estimate is a line-item estimate that references the Spec Book or special provisions
- The engineer's estimate is also used to set a goal for Disadvantaged Business Enterprise firms

# Construction Funding

## Typical Project Delivery Steps

### Agreement

#### -----Preliminary Engineering Authorization-----

- *Procure Professional Services*

### Environmental Document (required)

### ROW Plans (required)

#### -----Right of Way Authorization-----

#### -----Utility Authorization-----

- *Acquire Right of Way*
- *Relocate Utilities*

### Right of Way/Utility/RR Certification (required)

### Final Plans, Contract Proposal and Estimate (PS&E) (required)

#### -----Construction Authorization-----

## Construction Procurement

- Advertising and Letting a Construction Contract can only occur after Construction funds are authorized
- NCDOT must review and concur in the LGA's proposal to award a construction contract
- We have template letters and forms to use when requesting concurrence
- Once NCDOT has concurred, LGA will execute bid proposal, which becomes the construction contract.

## Construction

- Contract Administration and Construction Engineering & Inspection (CEI) is accomplished by the LGA in accordance with the NCDOT Construction Manual
- LGA should hire a professional engineering firm to provide these services – follow Professional Services guidance
- NCDOT will provide oversight through the Division Office or the Resident Engineer's Office
- NCDOT must concur with the LGA's acceptance of the project before final reimbursement can be made

# Let Construction Contract

## Typical Project Delivery Steps

### Agreement

#### -----Preliminary Engineering Authorization-----

- *Procure Professional Services*

### Environmental Document (required)

### ROW Plans (required)

#### -----Right of Way Authorization-----

#### -----Utility Authorization-----

- *Acquire Right of Way*
- *Relocate Utilities*

### Right of Way/Utility/RR Certification (required)

### Final Plans, Contract Proposal and Estimate (PS&E) (required)

#### -----Construction Authorization-----

- *Advertise and Let Construction Contract*
  - *Construct & Administer Contract*

### Final Inspection (required)

## Reimbursement

- Can occur throughout the project as costs are incurred.
- LGA pays full invoice; NCDOT reimburses 80% of eligible costs up to amount in agreement.
- Final Reimbursement will not occur until project is complete, accepted by NCDOT, and all reporting and other requirements have been accomplished.

## Close-Out and Final Voucher Date

- Department will process several items related to closing out the LGA project:
  - Ensuring that LGA has all appropriate records
  - Calculating any costs that the LGA owes the Department
  - Certifying materials permanently incorporated in the Project
- Once these items are accomplished, NCDOT will request FHWA close the project and issue a Final Voucher Date

## EBS Portal

The Project Management Tool on the EBS Portal will be used to:

- Request New Agreements and Supplemental Agreements
- Submit Documents for review by the Department
- Request Funding Authorizations for each phase of work
- Submit Reimbursement Requests for work performed EBS Portal is the electronic filing cabinet for projects



## LPMO Security Form

- Must have NCID and password to access the EBS Portal and Local Projects
- Form is on the Connect Website
- If you already have access to EBS Portal, for example Powell Bill, then we will add LPMO to your current access.

**Local Programs Management System Access Authorization Form**

Access to The Local Programs Management System requires a Username and Password. Please complete this form to set up access to manage local projects. The completed form should be sent to the LPMO Security Coordinator at [LPMO@ncdot.gov](mailto:LPMO@ncdot.gov).

**IMPORTANT:** All applicants are required to have a NCID to request access to the System. Please see Section 1 for information on obtaining a NCID.

**Section 1 – NCID**

NCID: \_\_\_\_\_

✓ Please contact your NCID Administrator to obtain a NCID. A list of administrators can be found at: [Local Government Employee](#) (Counties, City, Local Education Agencies, etc) or [State Employee Registration](#) (State Agencies, Organizations, Universities).

✓ NCIDs are user specific and cannot be shared. The account should be under your name and email address.

**Section 2 – Applicant Information**

First Name: \_\_\_\_\_ Last: \_\_\_\_\_

Agency Name: \_\_\_\_\_ Email: \_\_\_\_\_

Title: \_\_\_\_\_ Telephone: \_\_\_\_\_

Agency Address: \_\_\_\_\_

Remittance Address: \_\_\_\_\_

*Note: Remittance address is the official location for payment. Invoices and backup documentation will need to match the remittance address. Error in identifying the correct location will result in delayed payments.*

**Section 3 – Access Request Information (select one)**

ALL ROLES (includes the following):

- Submit PID Application (allows you to request an agreement)
- View Agreement & Submit Documentation (e.g. Plans & Specifications, Cost Proposals)
- Create/Submit Reimbursement Request/Claims
- Create/Submit Change Request (Amendment/Revision) (used to request funding authorizations or a supplemental agreement)

Display/View Roles Only (for staff who do not need to submit documents and only want to review information available. This role will not allow any workflow activities)

*I certify the information above is accurate, and I am the authorized person to perform the duties listed:*

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_

*I approve the above staff member to have access to the Local Project System on behalf of our Agency:*

Authorized Official Signature: (REQUIRED) \_\_\_\_\_

**Section 4 - For LPMO Use Only**

SAP Vendor Number: \_\_\_\_\_ Business Partner: \_\_\_\_\_

## Local Project System - EBS

- EBS - Enterprise Business Systems
- Used for several different programs within NCDOT:
  - Powell Bill Funds
  - Governor's Highway Safety Program (GHSP)
  - Public Transportation Division
  - Bike/Ped Planning Grants
- Roles are assigned based on your security form

## Local Project System - EBS

### Roles of LGA, LPMO and Division

LGA will:

- Request agreement
- Submit documents for review
- Request funding authorizations
- Submit reimbursement requests

## Local Project System - EBS

### Roles of LGA, LPMO and Division

LPMO will:

- Process and Approve agreement
- Coordinate review of professional services contracts
- Process PE reimbursements
- Process funding authorizations (PE, ROW, UTIL and CON)
- Issue Notice to Proceed for PE phase
- Coordinate review with Division or other staff

## Local Project System - EBS

### Roles of LGA, LPMO and Division

Division will:

- Review and approve dates for delivery
- Review and approve plans, environmental documents, right of way documents, construction contracts
- Oversee construction and close-out activities
- Process ROW, UTIL and CON reimbursements
- Provide Notice to Proceed for ROW, UTIL and CON Authorization
- Coordinate review with other staff as needed

## Actions for Application

Your Application will be Returned, Rejected or Approved.

- Returned: If the application needs to be corrected, or needs additional information
- Rejected: If the Project is not programmed in the STIP, you can't start agreement process
- Approved: An Agreement is started by the LPMO

# FIORI Interface in EBS

The screenshot shows a user interface with a dark blue header bar. In the header, there are two tabs: "Local Projects (LPMO)" and "Help". Below the header is a light gray grid containing six tiles, each with a title, a small icon, and a larger description area. The tiles are arranged in two rows of three. The first row contains: "Agreements" (with a clipboard icon), "LPMO Activities" (with a clipboard icon), and "LPMO Reimbursement Claim" (with a person and dollar sign icon). The second row contains: "LPMO Change Request" (with a clipboard icon), "LPMO Application" (with a clipboard icon), and "Sub-Recipient Dashboard" (with a bar chart icon).

Agreements	LPMO Activities	LPMO Reimbursement Claim	LPMO Change Request	LPMO Application	Sub-Recipient Dashboard

## New FIORI Interface in EBS

- Access by TILES not a menu
- Quick Overview
- Agreements - for current projects
- LPMO Activities - document submittals for review
- LPMO Reimbursement Claim - for reimbursement requests
- LPMO Change Request - to authorize funds or request a supplemental agreement
- LPMO Application - to request an agreement on a new project

# Agreements



## Set FILTERS and VIEW

- Organize based on any of the headers
- Pin header at the top
- Save VIEW as - give it a name
- Manage VIEWS

# AGREEMENTS – SET UP PERSONALIZED VIEW

Standard ▾ 

Agreement ID: Description: WBS Element: Process Type: Grantee ID: Status: Program: Tip#:        

**Go** **Adapt Filters**

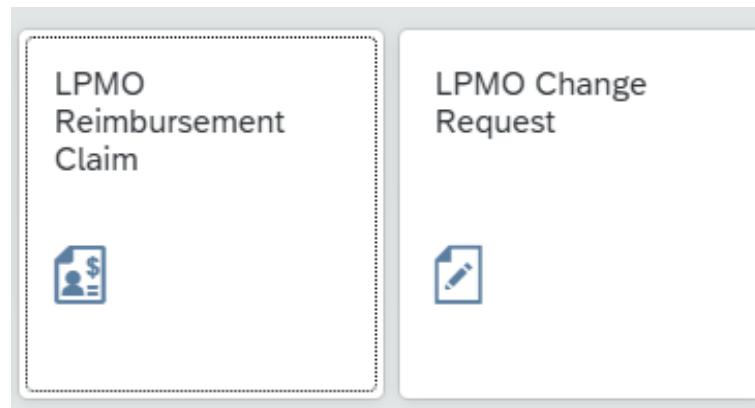
Agreements (33)  

Show Details   

Grantee Name	Agreement ID	Description	WBS Element	Agreement Amount	Expense Amount	Grant Expiration Date	Balance Amount	
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First login - view will be Standard  
Let's customize!

## Reimbursement Claim / Change Request



Only one CLAIM or CHANGE REQUEST at a time

- If one is ACTIVE, it will show in CURRENT view.
- See HISTORY for approved/rejected/canceled/archived
- LGA has the power to CANCEL outdated Claims or Change Requests (will show as rejected in HISTORY)
- Use CREATE (on far right) to start a new Claim or Change Request

### Future Improvements:

Need settings tool to filter, group, sort, etc. just like on Agreements - a lot of column headings are not needed

Need save as option for view

# Activities



Standard view shows CURRENT (in workflow) and HISTORY (Approved or Rejected)

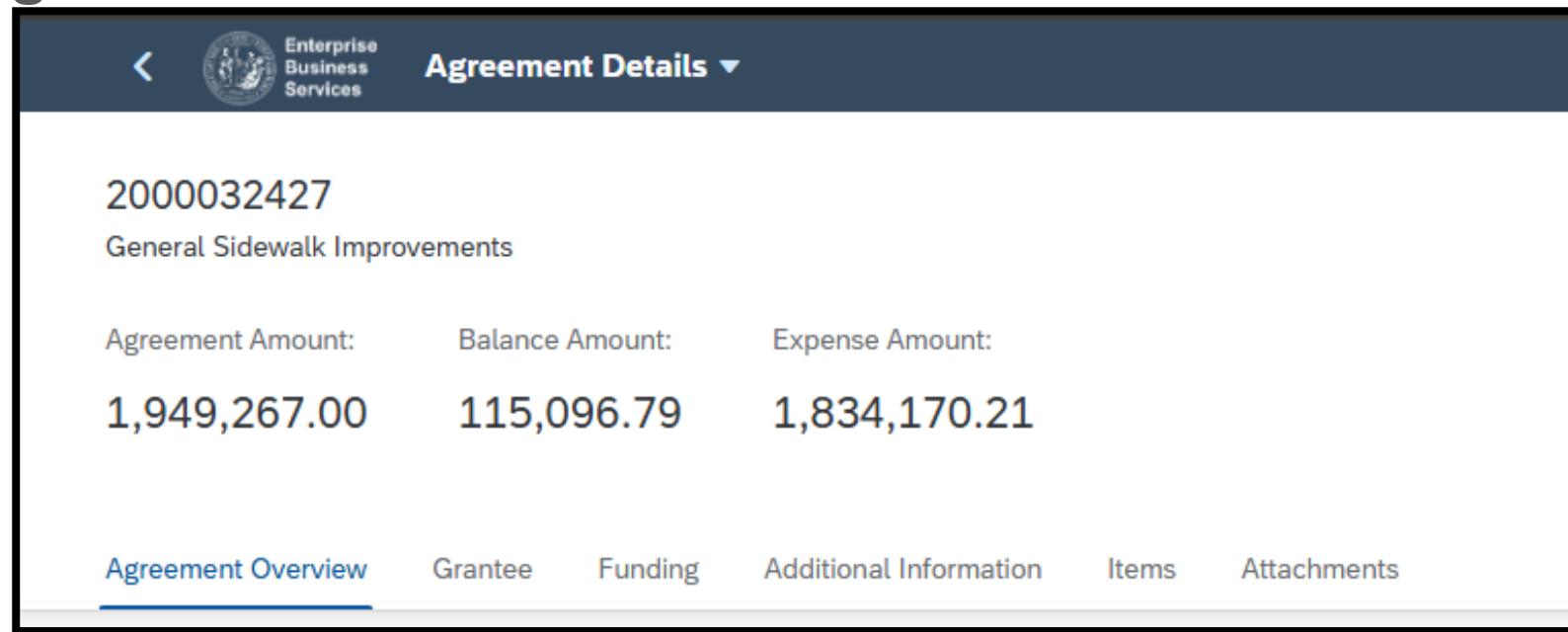
- Use CREATE on far right to start a new activity
- LGA has the power to CANCEL outdated activities (will show as rejected in HISTORY)

Future Improvements:

Is there a way to sort attachments?

Is there a limit on attachments?

## Agreement Details



2000032427  
General Sidewalk Improvements

Agreement Amount:	Balance Amount:	Expense Amount:
1,949,267.00	115,096.79	1,834,170.21

[Agreement Overview](#) [Grantee](#) [Funding](#) [Additional Information](#) [Items](#) [Attachments](#)

Shows high-level information on project

- Click through the different sections
- Work In Progress
- No longer use this screen to submit documents; instead click on appropriate tile.

## New Claim Workbook

- Will contain every reimbursement request from LGA per phase
- Allows LGA to document each invoice paid to vendors, contractors, consultants
- Avoid Duplicate Reimbursement Requests
- Located on LPMO Website

Reimbursement Tracking  
worksheet.xlsx



### Future Improvement:

- Incorporate Cover Letter into Workbook

## How to Budget or Estimate the Cost of Project?

- Raymond has a worksheet that he will describe

## Estimated Project Budget Worksheet

Estimated Project Budget			
	Total Costs	Federal Amount	Local Amount
Federal Reimbursement % for Eligible Phase(s)	80%		
Local Match %	20%		
# of Years Between Project Funding Award and Construction Start (Yr)	2.0		
Construction Duration (Mo)	12		
# of inspectors needed (Ea)	1.0		
Construction Estimate Amount (\$)	\$ 1,000,000		
NCDOT System Charges(%)	10%		
Contingency-PE (%)	10%		
Contingency-ROW(%)	10%		
Contingency-CON (%)	10%		
PE	\$ 150,000	\$ 120,000	\$ 30,000
GESC LAP Management	\$ -	\$ -	\$ -
Contingency-PE	\$ 15,000	\$ 12,000	\$ 3,000

	Total Costs	Federal Amount	Local Amount
PE	\$ 150,000	\$ 120,000	\$ 30,000
GESC LAP Management	\$ -	\$ -	\$ -
Contingency-PE	\$ 15,000	\$ 12,000	\$ 3,000
ROW	\$ 135,000	\$ 108,000	\$ 27,000
Utility	\$ 65,000	\$ 52,000	\$ 13,000
Contingency-ROW	\$ 20,000	\$ 29,200	\$ (9,200)
Construction Estimate	\$ 1,100,000	\$ 880,000	\$ 220,000
Construction CEI	\$ 240,000	\$ 192,000	\$ 48,000
Construction Engineering Support	\$ -	\$ -	\$ -
Contingency-CON	\$ 134,000	\$ 107,200	\$ 26,800
NCDOT Charges	\$ 150,040	\$ 120,032	\$ 30,008
PE Expense	\$ 178,200	\$ 132,000	\$ 33,000
ROW/UTL Expense	\$ 238,920	\$ 176,000	\$ 62,920
CON Expense	\$ 1,591,920	\$ 1,299,232	\$ 292,688
<b>Est Total Project Budget</b>	<b>\$ 2,009,040</b>	<b>\$ 1,620,432</b>	<b>\$ 388,608</b>

# Thank you!

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# Contact Us

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