



August 2022



2023-25 Statewide Transportation Improvement Fund Program Application Instructions

In coordination with the Statewide Transportation Improvement Fund (STIF) Program Guidebook, this step-by-step guide walks users through the web-based STIF Plan.

Contents

STIF Plan Format and Use	3
STIF Plan Organization	4
STIF Plan Form.....	5
1. Qualified Entity Information.....	5
1.1 Sub-Recipients in STIF Plan.....	6
2. Advisory Committees	7
2.1 Advisory Committee Website.....	7
3. Local Plan Compliance	8
3.1 Existing Local Plans from Which Project(s) Are Derived.....	8
3.2 Local Plan Requirements.....	9
4. Accountability.....	9
4.1 Accountability Methods.....	9
4.2 Sub-Allocation Method	10
4.3 High Percentage of Low-Income Households	11
5. STIF Plan Period and Adoption.....	11
5.1 Period Covered by STIF Plan.....	11
5.2 STIF Plan Adoption	11
6. Projects.....	12
6.1 Project Detail Entry	12
6.2 Allocation of STIF Funds by Project.....	24
6.3 Oregon Public Transportation Plan Goals	26
6.4 Project Summary	27
7. STIF Plan Summary	29

Figures

Figure 1: Saving the STIF Plan	3
Figure 2: Qualified Entity Information	5
Figure 3: Expanded Form when Sub-Recipients Are in the STIF Plan	6
Figure 4: Advisory Committee Information.....	7
Figure 5: Existing Local Plans from Which Project(s) Are Derived	8
Figure 6: Local Plan Consistency with STIF Rule Requirements.....	9
Figure 7: Non-Compliant Local Plans	9
Figure 8: Accountability Methods Acknowledgement.....	10
Figure 9: Sub-Allocation Description.....	10
Figure 10: High Percentage of Low-Income Households Explanation	11
Figure 11: Start and End Dates for All Projects in the STIF Plan.....	11
Figure 12: STIF Plan Adoption and Governing Body Information	12
Figure 13: Optional Upload of Approved Sub-Recipient Project Applications	13
Figure 14: Optional Project Detail Entry for Sub-Recipient Project Applications	14
Figure 15: Project Detail Entry for Project 1.....	15
Figure 16: Funds will be Expended in a Future STIF Plan Period.....	16
Figure 17: Funds will Not be Expended in a Future STIF Plan Period.....	17
Figure 18: Project Is Part of a Multi-Phase Project.....	17
Figure 19: Project Scope Task Description	18
Figure 20: Category that Best Describes the Task Item	19
Figure 21: Expenditures by Fund Source and Fiscal Year.....	20
Figure 22: Outcome Measures Associated with an Operations Project	22
Figure 23: Outcome Measures Required for a Mobility Management Project.....	23
Figure 24: Quantifiable Outcome Measures	24
Figure 25: Percentage of STIF Budget Allocated to Each of the Criteria by Fiscal Year	25
Figure 26: Identify How Projects Are Consistent with OTP Goals and Policies	27
Figure 27: Auto-Calculated Project Summary	28
Figure 28: Auto-Calculated STIF Plan Summary.....	30
Figure 29: STIF Plan Serves as a Legally Binding Agreement.....	31
Figure 30: Download and Upload the Signature Page	32
Figure 31: Saving and Submitting the STIF Plan	32

STIF Plan Format and Use

The Statewide Transportation Improvement Fund (STIF) Plan is a fillable, web-based form that serves as the mechanism for accessing STIF Formula funds. ODOT creates and publishes this form each solicitation cycle and accessing it requires an internet connection.

This resource is a step-by-step guide for completing and submitting the STIF Plan. For more information about the STIF Formula program and a summary of requirements, please see the [STIF Program Guidebook](#).

The [STIF Plan](#) can be found online. The form can also be accessed through the STIF Formula section of the [Public Transportation Funding Opportunities Page](#). Chrome, Firefox, and Edge are the recommended web browsers. The form will not function in Internet Explorer since Microsoft has ended support for this browser.

The STIF Plan uses a combination of check boxes, yes or no questions, text boxes, and buttons for uploading documents and adding information. All questions on the form must be answered unless specified as optional. Failure to respond could result in Oregon Department of Transportation's (ODOT) determination that the STIF Plan is incomplete and re-submittal is required. Some yes or no questions, when checked, generate additional questions from a drop-down menu based on the response. It is very important to answer all questions as they generate additional choices.

When you first access the STIF Plan, select the "Save" button, located in the lower right-hand corner of the form. After pressing "Save," a window will appear showing a personalized link for your STIF Plan (Figure 1).

Figure 1: Saving the STIF Plan

Your progress has been saved.

Copy or email the link below and return to your form to complete your submission.

Copy your form link:

Email me my link:

This link can be copied, saved, and then pasted into the search bar of your internet browser to return to the last saved version of the form. You may also enter your email address here and press "Send" to have a link to the form emailed to you.

Always use the "Save" button before closing the form to save data entered during that session. When you have finished entering all STIF Plan information, you will submit the form to ODOT using the "Submit STIF Plan" button. Upon submittal, a copy of the completed form will be emailed to you for your records and to ODOT for processing.

Please do not print and scan your application to us. Printed and scanned forms will only be accepted in extraordinary circumstances. If you would like to print your STIF Plan for use locally, be mindful that you may need to print each section separately as the STIF Plan has been divided into six sections (with tabs at the top for each section).

ODOT has also created an optional form for use by sub-recipients to provide their Qualified Entity (QE) with all of the information required for each project. The [Sub-Recipient Project Application form](#) can be found online. When a sub-recipient submits the form, the information is sent to their Qualified Entity who can use it as a reference when submitting the STIF Plan.

Beginning in the 2023-25 cycle, Qualified Entities may choose to upload approved Sub-Recipient Project Applications instead of manually entering the same information on the STIF Plan form. More information about this optional step can be found in Section 6. Use of the Sub-Recipient Project Application form is not a required step in the application process, but is a helpful tool used successfully by most entities in previous STIF Plan cycles.

If you have technical problems using either form, please contact Brian Roth, Web and Forms Developer for ODOT's Public Transportation Division, at 541-508-9862 or by email at Brian.Roth@odot.oregon.gov. For answers to programmatic or process-specific questions, contact your [regional transit coordinator](#).

STIF Plan Organization

The STIF Plan has the following seven sections:

- Qualified Entity
- Advisory Committees
- Local Plan Compliance
- Accountability
- STIF Plan Period and Adoption
- Projects
- STIF Plan Summary

There are tabs at the top of the STIF Plan pertaining to each of those sections except STIF Plan Summary. Once you're finished entering information on a given page and have moved onto the

next one, you will be able to return to the previous page by clicking the section name at the top. You will be able to toggle between completed pages until you submit the STIF Plan.

STIF Plan Form

1. Qualified Entity Information

Select the Qualified Entity name from the drop-down menu. Complete each field in this section with the appropriate contact information (Figure 2).

Figure 2: Qualified Entity Information

1. Qualified Entity

Qualified Entity Name *

Qualified Entity Address *

Address Line 1

City Oregon Zip Code

STIF Plan Contact Name * STIF Plan Contact Title *

STIF Plan Contact Email * STIF Plan Contact Phone Number *

Employer Identification Number (EIN) *

Will any of the projects in this STIF Plan use funds jointly managed with one or more other Qualified Entities? *

For the last question, select "Yes" from the drop-down menu if any STIF Plan projects use funds that will be jointly managed by more than one Qualified Entity. Select the "Upload" button to attach documentation of the joint management agreement. Some examples of a joint management agreement include a memorandum of understanding, an intergovernmental agreement, or a Governing Body resolution.

If no STIF Plan projects use funds that will be jointly managed by more than one Qualified Entity, select "No" from the drop-down menu.

1.1 Sub-Recipients in STIF Plan

If there are no sub-recipients in this STIF Plan, keep the default response in the first question set to "No" to verify that the Qualified Entity is the only service provider in the STIF Plan.

If there are any sub-recipients in this STIF Plan, select "Yes" in the first question, and complete all fields with the correct information (Figure 3). This setting allows all fields to populate each time the "+Add Provider" button is selected. Continue to add providers to the STIF Plan until all entities have been entered.

Figure 3: Expanded Form when Sub-Recipients Are in the STIF Plan

1.2 Sub-Recipients in STIF Plan

⊗ **Provider 1**

Are any Sub-Recipients included in this STIF Plan? *

Yes
▼

Provider Name *

Sub-Recipient Contact Name *	Sub-Recipient Contact Title *
Sub-Recipient Phone Number *	Sub-Recipient Email *
Sub-Recipient Type *	Sub-Recipient Employer Identification Number (EIN) *

Sub-Recipient Website *

+ Add Provider

2. Advisory Committees

2.1 Advisory Committee Website

Review all of the Advisory Committee requirements specified in the Advisory Committee section and Oregon Administrative Rules (OARs) [732-040-0030](#), [732-040-0035](#), and [732-042-0020](#) (Figure 4). Check the box to agree that all Advisory Committee requirements have been met before proceeding.

Figure 4: Advisory Committee Information

2. Advisory Committees

2.1 Advisory Committee Website

By checking this box, I agree that all Advisory Committee requirements of OARs 732-040-0030, 732-040-0035 and 732-042-0020 have been met, including, but not limited to: required constituencies, written bylaws, public meetings, and STIF Plan project review and prioritization.

Advisory Committee Web Address

If this information is not available on a website, you must upload other documentation that demonstrates how Advisory Committee information was published.

or drag files here.

Limit 100 MB

Did the QE's Advisory Committee or Governing Body convene an optional work group as outlined in OAR 732-040-0030? *

Yes

No

Please upload meeting minutes demonstrating that input from the optional work group was considered as part of the Advisory Committee process. *

or drag files here.

Enter the Advisory Committee website address in the appropriate field.

Copies of the Advisory Committee bylaws, meeting minutes, and meeting notices must be published by the Qualified Entity and made available for public review in a reasonable and timely manner. If this information is not available on a website, you may upload other documentation that demonstrates how the Advisory Committee requirements have been met and that the information was made publicly available by selecting the "Upload" button.

If the Qualified Entity's Advisory Committee or Governing Body convened an optional work group as outlined in OAR 732-040-0030, select "Yes." You may upload the meeting minutes demonstrating that input from the work group was considered as part of the Advisory Committee process by selecting the "Upload" button. If the Qualified Entity's Advisory Committee or Governing Body did *not* convene an optional work group as outlined in OAR 732-040-0030, select "No."

3. Local Plan Compliance

3.1 Existing Local Plans from Which Project(s) Are Derived

Enter the local plan name from which the projects in the STIF Plan were derived (Figure 5). Reference [OAR 732-040-0005\(18\)](#) for the Local Plan definition. Examples of local plans that may meet these requirements include coordinated public human services transportation plans, transportation system plans, transit development plans, and transit master plans. ODOT's regional transit coordinators can help you identify and evaluate your local plans for compliance with STIF rules.

Figure 5: Existing Local Plans from Which Project(s) Are Derived

3. Local Plan Compliance

3.1 Existing Local Plans from which project(s) are derived.

⊗ **Local Plan 1**

Local Plan Name *	Governing Body that adopted Local Plan *	Plan Adoption Date *
<input type="text"/>	<input type="text"/>	<input style="border: 1px solid #ccc; border-radius: 4px; text-align: center; width: 80px; height: 25px; font-size: 0.9em; color: #666; background-color: #f9f9f9; display: flex; align-items: center; justify-content: center;" type="text"/> 📅

Local Plan Web Address *

Upload copy of Local Plan if it is not available on a website. *

Upload

or drag files here.

Limit 100 MB

+ Add Local Plan

Enter the name of the board, council, commission, or other Governing Body that approved the local plan; the adoption date; and the web address where the local plan may be referenced. If

this information is not available on a website, you may upload a copy of the relevant plan or policy. Select "+Add Local Plan" to list additional local plans.

3.2 Local Plan Requirements

Select "Yes" if all local plans are consistent with STIF Rule requirements (Figure 6).

Figure 6: Local Plan Consistency with STIF Rule Requirements

3.2 Local Plan requirements

I agree that all Local Plans are consistent with the STIF requirements specified in OAR 732-040-0005(18) *

Yes

No, one or more Local Plans are not yet consistent with STIF rule requirements.

Select "No" if one or more local plans are not yet consistent with STIF Rule requirements. Describe why a local plan is not compliant with STIF requirements (Figure 7).

Figure 7: Non-Compliant Local Plans

If one or more Local Plans are non-compliant, identify which Local Plan is non-compliant, describe how it is non-compliant, and the schedule to bring it into compliance. *

Limit 500 Characters

4. Accountability

4.1 Accountability Methods

Select both boxes to affirm that all of the required policies and procedures are in place (Figure 8). Review [OAR 732-040](#) and [OAR 732-042](#) (paying particular attention to Audit and Compliance Review Requirements) if necessary before agreeing to these statements.

Figure 8: Accountability Methods Acknowledgement

4. Accountability

You may insert a web address in place of a description or document upload, as long as the information is sufficient enough to warrant approval of the STIF Plan and comply with STIF Rule.

4.1 Accountability methods

By checking this box, I affirm that all of the necessary policies and procedures are in place to provide reasonable assurance that compliance with OAR 732, Divisions 40 and 42 is met, and to achieve the goals and outcomes specified in this STIF Plan, including, but not limited to: program and financial management, operations management, procurement, use and maintenance of equipment, records retention, compliance with state and federal laws, civil rights, and compliance with ADA.

By checking this box, I affirm that all of the necessary policies and procedures are in place to provide reasonable assurance that compliance of all Sub-Recipients with OAR 732, Divisions 40 and 42 is met to achieve the goals and outcomes specified in this STIF Plan, address deficiencies in Sub-Recipient performance, and to provide reasonable assurance that the Qualified Entity can accomplish the applicable requirements of these rules, including but not limited to: audit and compliance requirements, accounting requirements, capital asset requirements, and reporting requirements.

4.2 Sub-Allocation Method

Select the box to affirm that all data used to develop the sub-allocation method have been shared with the appropriate parties. Enter a description of your sub-allocation method in the field provided or upload your response (Figure 9). For Qualified Entities that are the only Public Transportation Service Provider within their area of responsibility and where no other potential Public Transportation Service Provider has expressed interest in applying for STIF Formula funding, you may describe these conditions and specify that sub-allocation isn't possible.

Figure 9: Sub-Allocation Description

4.2 Sub-Allocation method

By checking this box, I affirm that all data used to develop the sub-allocation method was shared with each Public Transportation Service Provider and other potential sub-recipients, as relevant.

Describe the Qualified Entity's method for sub-allocating STIF Formula Fund moneys and the collaborative process used to work with Public Transportation Service Providers and other potential Sub-Recipients, as relevant, to develop the sub-allocation method. *

Limit 1000 Characters

Upload Response *

 or drag files here.

Limit 100 MB

4.3 High Percentage of Low-Income Households

Enter your explanation in the field provided or upload your response (Figure 10).

Figure 10: High Percentage of Low-Income Households Explanation

4.3 High Percentage of Low-Income Households

Explain how the STIF Plan defines and identifies communities with a high percentage of Low-Income Households. *

Limit 1000 Characters

Upload Response *

Upload or drag files here.

Limit 100 MB

5. STIF Plan Period and Adoption

5.1 Period Covered by STIF Plan

Enter the start and end dates for all projects in this STIF Plan (Figure 11). The earliest possible start date for this solicitation cycle is July 1, 2023. A STIF Plan can be for one or two biennia, so the end date for this funding cycle would either be June 30, 2025, or June 30, 2027.

Figure 11: Start and End Dates for All Projects in the STIF Plan

5. STIF Plan Period and Adoption

5.1 Period Covered By STIF Plan

Provide start and end dates for projects proposed for funding in this STIF Plan. The earliest possible start date is July 1, 2023.

Start Date: * End Date *

7/1/2023
📅

▼

5.2 STIF Plan Adoption

Enter the appropriate dates in the fields provided (Figure 12). Enter the website where the Governing Body adoption document is located or press "Upload" to attach a file if the website is unavailable.

Figure 12: STIF Plan Adoption and Governing Body Information

5.2 STIF Plan Adoption

STIF Plan Advisory Committee recommendation date * STIF Plan Governing Body adoption date *

Website where Governing Body adoption document is located *

Upload Governing Body adoption document if website is unavailable. *

or drag files here.

Limit 100 MB

Did the Governing Body modify the Advisory Committee's recommended STIF Plan? *

Yes
▼

If yes, explain why the Governing Body modified the Advisory Committee's recommended STIF Plan. *

✎

Limit 1000 Characters

If the Governing Body modified the Advisory Committee's recommended STIF Plan, select "Yes" from the drop-down menu. Explain why the Governing Body modified the Advisory Committee's recommended STIF Plan in the text box that appears.

If the Governing Body did not modify the Advisory Committee's recommended STIF Plan, select "No" from the drop-down menu.

6. Projects

6.1 Project Detail Entry

Beginning this cycle, you may now upload Sub-Recipient Project Applications instead of manually entering the information for each sub-recipient (Figure 13). All uploaded Sub-Recipient Project Applications must be approved by the Qualified Entity's Governing Body and will be recognized as part of the Qualified Entity's STIF Plan.

In addition to this, any Qualified Entities with their own STIF Plan projects may enter that information directly into the STIF Plan form, or may choose to upload their own Sub-Recipient Project Application. In all cases, you cannot split information for a single entity between the STIF Plan and an uploaded Sub-Recipient Project Application. All project information for a given

entity must be contained either solely within the Sub-Recipient Project Application or STIF Plan itself.

If you'd like to use this optional upload feature, enter the total amount from each Sub-Recipient Project Application in the conditional boxes that appear in Figure 14 (this information can be found in the last section of the Sub-Recipient Project Application). This will ensure that the sum of all Qualified Entity and sub-recipient projects are included in STIF Plan Section 7 STIF Plan Summary.

Figure 13: Optional Upload of Approved Sub-Recipient Project Applications

6. Projects

Beginning this cycle, you may now upload Sub-Recipient Project Applications instead of manually entering the information for each sub-recipient. All uploaded Sub-Recipient Project Applications must be approved by the Qualified Entity's Governing Body, and will be recognized as part of the Qualified Entity's STIF Plan.

In addition to this, any Qualified Entities with their own STIF Plan projects may enter that information directly into the STIF Plan, or may choose to upload their own Sub-Recipient Project Application. In all cases, you cannot split information for a single entity between the STIF Plan and an uploaded Sub-Recipient Project Application. All project information for a given entity must be contained either solely within the Sub-Recipient Project Application or STIF Plan itself.

Important note: If you'd like to use this optional upload feature, please enter the total amount from each Sub-Recipient Project Application in the conditional boxes that will appear below (this information can be found in the last section of the Sub-Recipient Project Application). This will ensure that the sum of all Qualified Entity and sub-recipient projects are included in STIF Plan section 7. STIF Plan Summary.

Would you like to upload any approved Sub-Recipient Project Applications for this STIF Plan? *

Yes

No

Figure 14: Optional Project Detail Entry for Sub-Recipient Project Applications

6.1 Project Detail Entry

⊗ **Sub-Recipient 1**

Upload Project Application Here *

Upload or drag files here.

Sub-Recipient Name *

Sub-Recipient Project Application Total *	Amount Carried Forward *
---	--------------------------

FY 2024 Total STIF Funds *	FY 2025 Total STIF Funds *
FY 2024 Student STIF Funds *	FY 2025 Student STIF Funds *
FY 2024 Percent of STIF Funds supporting student transportation *	FY 2025 Percent of STIF Funds supporting student transportation *
FY 2024 Older and Disabled Persons STIF Funds	FY 2025 Older and Disabled Persons STIF Funds
FY 2024 Total STIF Funds From Previous Cycle *	FY 2025 Total STIF Funds From Previous Cycle *

Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve

+ Add Sub-Recipient

If you choose not to use this optional upload feature, provide the following for Project 1 (Figure 15):

Figure 15: Project Detail Entry for Project 1

6.1 Project Detail Entry

⊗ **Project 1**

Qualified Entity or Sub-Recipient Name *

Project Name *

Limit 50 characters

Project Description *

Limit 1000 Characters

Do you plan to expend funding in a future STIF Plan period? *

Yes

No

- Enter the appropriate Qualified Entity or sub-recipient name.
- Enter a project name in the field provided. ODOT recommends that a project name is concise, similar to names used in Local Plans, and applicable to all project elements. Multi-phase projects will need to use the same name in future STIF Plans. The name is restricted to 50 characters to facilitate data collection and analysis.
- Enter a project description in the field provided. The project description is an opportunity to provide concise information about the project purpose and service elements. Suggested elements include the project location or extent, service span, frequency, stops, intended customers, vehicles, equipment, and marketing or other activities needed to implement service.
- Determine if you plan to expend funding in a future STIF Plan period for this project.
 - If “Yes,” enter information about this project in the fields that appear (Figure 16).
 - This is the last step for a project where funds will be expended in a future STIF Plan period.

- If there are other projects on this STIF Plan, select "+Add Project." Follow the instructions provided for Project 1 for all subsequent projects.
 - If there are no other projects on this STIF Plan, continue on to Section 7 STIF Plan Summary.
- If "No," enter information about this project in the fields that appear (Figure 17).
- If your answer to the question, "Is your project part of a larger, multi-phase project," is "Yes," you must complete the fields (Figure 18)¹. For more information on this requirement, reference [OAR 732-042-0015\(3\)](#).
 - More information is required for projects without funds to be expended in a future STIF Plan period. Continue on to Section 6.1.1 Project Scope.

Figure 16: Funds will be Expended in a Future STIF Plan Period

Do you plan to expend funding in a future STIF Plan period? *

Yes

No

If yes, what is the expenditure amount? *

This will be added to the total amount of STIF funds requested.

What is the project type that you are carrying forward funds for? *

Vehicle Purchase 111-00

Equipment Purchase

Facility Purchase

Signs/Shelters Purchase

Operations 30.09.01 (Operating Assistance)

Planning 44.20.00

Preventive Maintenance 11.7A.00

Project Administration 11.79.00

Mobility Management 11.7L.00

Communications 44.26.14

Program Reserve 11.73.00

Capital 117-00 Other Capital Items (Bus)

¹ Some major capital public transportation Projects and other types of Projects may be unable to reach completion within a single STIF Plan period. Applicants may have Projects that extend over multiple STIF Plan periods. If your Project is part of a larger multi-phased Project, select "Yes" from the drop-down box.

Figure 17: Funds will Not be Expended in a Future STIF Plan Period

Do you plan to expend funding in a future STIF Plan period? *

Yes

No

Project budget share to improve, expand or maintain public transportation service

Improve or Expand Service * Maintain Service 0%

Local Plan from which this project is derived: * Local Plan page number *

Multi-Phase Project

Is your project part of a larger, multi-phase project? *

Figure 18: Project Is Part of a Multi-Phase Project

Multi-Phase Project

Is your project part of a larger, multi-phase project? * Project Timeline *

Total Project Budget (All Phases) * Other Planned Funding Sources * STIF Federal Other State Local

Phase represented in current STIF Plan *

Limit 200 Characters

6.1.1 Project Scope

Enter a description for this task in the field provided (Figure 19). Use the examples provided when considering the amount of detail to include in this description.

Figure 19: Project Scope Task Description

6.1.1 Project Scope

⊗ **Task 1**

Task Description *

Examples:

- Purchase and installation of up to 12 branded bus stop signs.
- This task provides resources for additional peak service to accommodate increased demand associated with implementation of the Youth Fare program.

Limit 250 Characters

Choose the category that best describes this task item (Figure 20). Depending on which option you select, new field(s) will appear for you to enter more specific information about the item. Here's an overview of the extra information asked for each task category:

1. **Equipment, facility, and signs/shelters purchase:** Enter a brief description of the item followed by the quantity and unit cost.
2. **Operations:** Is this for fixed route or demand response service and what is the total cost (Task Category Amount)?
3. **Planning, Preventive Maintenance, Project Administration, Mobility Management, Communications, and Program Reserve:** What is the total cost?
4. **Vehicle purchase:** Is this a replacement, expansion, or other type of capital vehicle purchase?
5. **Capital (Other Capital items):** What is the total cost and activity type?

Figure 20: Category that Best Describes the Task Item

Category *

- Communications 44.26.14
- Equipment Purchase
- Facility Purchase
- Mobility Management 11.7L.00
- Operations 30.09.01 (Operating Assistance)
- Planning 44.20.00
- Preventive Maintenance 11.7A.00
- Program Reserve 11.73.00
- Project Administration 11.79.00
- Signs/Shelters Purchase
- Vehicle Purchase 111-00
- Capital 117-00 Other Capital Items (Bus)

6.1.2 Expenditure Estimates

If this project is funded solely by STIF, enter the expenditure amounts in the STIF row and select the check box confirming that this is the only funding source (Figure 21). The first column in this section represents the first year of the STIF Plan period (FY 2024), and the second column represents the second year of the STIF Plan period (FY 2025).

Figure 21: Expenditures by Fund Source and Fiscal Year

6.1.2 Expenditure Estimates

Expenditures by Fund Source and Fiscal Year

Enter estimates of all expenditures for activities in this task denoting both fund source and fiscal year of expenditure. Do not select more than eight fund sources.

Fund Type *	FY 2024 †	FY 2025 †		Total
<input checked="" type="checkbox"/> STIF				\$0.00
<input checked="" type="checkbox"/> Federal				\$0.00
<input checked="" type="checkbox"/> Other State				\$0.00
<input checked="" type="checkbox"/> Local				\$0.00
<input checked="" type="checkbox"/> Other Funds				\$0.00
<input checked="" type="checkbox"/> Prior Biennia STIF Funds				\$0.00
<input checked="" type="checkbox"/> Prior Biennia Interest Accrued				\$0.00
<input checked="" type="checkbox"/> Prior Biennia Program Reserve				\$0.00
	\$0.00	\$0.00		\$0.00

By checking this box, I confirm that this project task is only funded by STIF.

If this project will be supported with funds outside of what is requested in this STIF Plan, enter the information about those funds in the boxes provided.

Note: If your STIF Plan covers two biennia as detailed in Section 5.1 Period Covered by STIF Plan, two additional columns will appear so that you can estimate expenditures for FY 2026 and FY 2027.

Here is a brief overview of the various funds mentioned in the budget table shown in Figure 21:

1. **STIF:** This value will include the funds requested from the STIF program to support the transportation project activity in this STIF Plan timeframe. You must ensure the total amount of funds entered in this category does not exceed your total allocation. The STIF Plan funding balance will be indicated in the STIF Plan Summary table.
2. **Federal:** This value will include the funds expected from any federal sources to fund the transportation project activity, such as Federal Transit Administration (FTA) Sections [5310](#), [5311](#), and [5307](#). You do not need to input the specific funding program, only the total amount of federal funding expected.

3. **Other State:** This value will include any other state funds expected to fund the transportation project activity.
4. **Local:** This value will include any funds generated or collected by the district, county, city, or other local/special district, to be applied to the transportation project activity. Examples include local tax revenues, service agreements with local agencies, and general funds. It could also include contributions by private organizations to support the project activity, either directly or through the sub-recipient. ODOT suggests you enter only funds you can reasonably assume will be available within the STIF Plan timeframe based on historical trends or commitments based on local budgeting and agreement processes.
5. **Other Funds:** This value will include all other fund sources that are budgeted to fund this project, such as private contributions.
6. **Prior Biennia STIF Funds:** This value will include unspent STIF Formula funds carried over from a previous STIF cycle. All unspent funds should be programmed into the 2023-25 STIF Plan².
7. **Prior Biennia Interest Accrued:** This value will include interest accrued on unspent STIF Formula funds from a previous STIF cycle.
8. **Prior Biennia Program Reserve:** This value will include program reserve funds from a previous STIF cycle.

Note: The "+Add Fund Source" button is a technical error on the form and is not to be selected.

6.1.3 Outcome Measures

Qualified Entities are required to include anticipated outcomes for each STIF Plan project (Figure 22). Outcome measures are quantifiable, discrete ways to describe the benefits the provider expects to achieve after implementing each project over the STIF Plan period.

ODOT has identified a number of required outcome measures for certain capital, operations, and communications task categories. For other task categories, you must specify at least one outcome measure that best reflects the benefits of each task. Completing the minimum required outcomes will enable ODOT to compile and report STIF outcomes on a consistent, statewide basis. Qualified Entities should apply the FTA's National Transit Database (NTD) reporting definitions to the STIF Plan outcomes. The outcomes should fit into standard reporting procedures and methods that will be consistent with future reporting.

The outcome measures listed in this section are tied directly to the task categories chosen in Section 6.1.1 Project Scope. For example, the outcome measures associated with an operations project are shown in Figure 22.

²For help estimating this amount, please contact Andrew O'Keefe, PTD Financial Manager, at Andrew.S.Keefe@odot.oregon.gov.

Figure 22: Outcome Measures Associated with an Operations Project

6.1.3 Outcome Measures

Minimum required measures for operations tasks

Revenue Miles * Revenue Hours * Rides *

Number of people with access to transit (within ½ mile of transit stop for fixed route) *

Number of Low-Income Households with access to transit (within ½ mile of transit stop for fixed route) *

Number of new shared stops with other transit providers (reducing fragmentation in transit services) *

Is this project supporting student transportation? *

▼

Is this project supporting services for older adults and people with disabilities? *

▼

Please select at least one outcome measure that best reflects the benefit of this task.

The questions presented in Figure 22 are crucial for reporting purposes but would not necessarily apply to all task categories. Figure 23 provides another example, this time of the outcome measures required for a mobility management project.

Figure 23: Outcome Measures Required for a Mobility Management Project

6.1.3 Outcome Measures

Please select at least one outcome measure that best reflects the benefit of this task.

⊗ **Outcome Measure 1**

Mobility Management

Number of individuals that received transit training

Number of individuals that are served by a coordinated demand response call center

All Project Types

Other Measure

Marketing Materials Created

Number of Units:

[+ Add Outcome Measure](#)

Some task categories don't require specific outcome measures as demonstrated in Figure 23. In those instances, please select at least one Outcome Measure from the drop-down list provided (Figure 24) and include the number of units, such as vehicles or signs to be purchased.

Figure 24: Quantifiable Outcome Measures

6.1.3 Outcome Measures

Please select at least one outcome measure that best reflects the benefit of this task.

⊗ **Outcome Measure 1**

All Project Types

Other Measure

Number of Units:

+ Add Outcome Measure

When this step has been completed, determine if there are other tasks to add for this specific project. If there are other tasks for this specific project, press "+Add Task" and follow these same steps starting at Section 6.1.1 Project Scope.

If there are no other tasks for this specific project, continue on to Section 6.2 Allocation of STIF Funds by Project.

6.2 Allocation of STIF Funds by Project

You must specify the amount of Formula funds allocated to the eight STIF criteria listed in Figure 25, as outlined in OAR 732-042-0015. Identify what percentage of a STIF project budget is allocated to each of the criteria listed (e.g., providing transit to students in grades 9 through 12) by fiscal year.

Figure 25: Percentage of STIF Budget Allocated to Each of the Criteria by Fiscal Year

6.2 Allocation of STIF funds by project

Please identify what percentage of this STIF project budget is allocated to each of the criteria listed below by fiscal year.

Note: More information about requirements for criterion #7 can be found in [OAR 732-042-0015\(3\)\(j\)](#). More information about requirements for criterion #8 can be found in [OAR 732-042-0010\(1\)\(a\)](#).

STIF Criteria

1. Increased frequency of bus service to areas with a high percentage of Low-Income Households.
2. Expansion of bus routes and bus services to serve areas with a high percentage of Low-Income Households.
3. Fund the implementation of programs to reduce fares for public transportation in communities with a high percentage of Low-Income Households.
4. Procurement of low or no emission buses for use in areas with 200,000 or more.
5. The improvement in the frequency and reliability of service between communities inside and outside of the Qualified Entity's service area.
6. Coordination between Public Transportation Service Providers to reduce fragmentation in the provision of transportation services.
7. Implementation of programs to provide student transit service for students in grades 9-12.
8. Services for older adults and people with disabilities.

FY 2024 STIF Total FY 2025 STIF Total
 \$0.00 \$0.00

Fund Allocation (Must not exceed 100% per criterion per fiscal year)
If some criteria don't apply, fill in with zeros. Do not add or remove additional criterion.

Criterion	FY 2024 *	FY 2025 *
<input checked="" type="checkbox"/> Criterion 1	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 2	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 3	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 4	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 5	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 6	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 7	0.0%	0.0%
<input checked="" type="checkbox"/> Criterion 8	0.0%	0.0%
	0.00%	0.00%

+ Add #

The total for each criterion in each fiscal year may not exceed 100 percent, but may be a percentage that ranges from 0 to 100 percent. A single project may have benefits that meet more than one criterion. In these instances, use your best professional judgment to specify which percentage of the funding meets each of the applicable criteria. The STIF Plan will auto-calculate the amount of funding allocated to each of the eight criteria based on the percentages you specify. This will enable ODOT to report the amount of funds allocated to each of the eight areas recognizing that many projects will meet multiple criteria.

The percentage entered for criterion seven, which pertains to funding for student transit services for students in grades 9 through 12, is used to calculate whether the Qualified Entity will meet the statutory requirement of spending at least one percent of Formula Fund funds received each year on transportation services for students in grades 9 through 12, if practicable (see definition of Student Transit Services in [OAR 732-040-005](#)).

The percentage entered for criterion eight, which pertains to funding for older adults and people with disabilities, is used to calculate whether the Qualified Entity will meet the statutory requirement of allocating funds received via the population-based formula to transit service for older adults and people with disabilities.

6.3 Oregon Public Transportation Plan Goals

Qualified Entities are required to identify how each project is consistent with [Oregon Public Transportation Plan](#) (OPTP) goals and policies (Figure 26). The OPTP is an essential plan for supporting the development of the statewide public transportation system. The title for each OPTP goal is listed in this section next to a checkbox, and you must select at least one goal that applies to each specific STIF Plan project. To learn more about the intricacies and policies associated with each goal, consult page eight of the OPTP.

Figure 26: Identify How Projects Are Consistent with OTP Goals and Policies**6.3 Oregon Public Transportation Plan Goals**

Select at least one goal.

For more information about these goals, please refer to page eight of the [Oregon Public Transportation Plan](#).

Select the OTP goals that apply to your STIF Plan Projects. *

- Goal 1 Mobility: Public Transportation User Experience
- Goal 2: Accessibility and Connectivity
- Goal 3: Community Livability and Economic Vitality
- Goal 4: Equity
- Goal 5: Health
- Goal 6: Safety and Security
- Goal 7: Environmental Sustainability
- Goal 8: Land Use
- Goal 9: Funding and Strategic Investment
- Goal 10: Communication, Collaboration, and Coordination

6.4 Project Summary

The data in this section are auto-calculated based on responses entered about a specific project in previous sections (Figure 27).

Figure 27: Auto-Calculated Project Summary

6.4 Project Summary	
Project Name	
STIF Project Grand Total	
\$0.00	
<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	
FY 2024 STIF Project Total	FY 2025 STIF Project Total
\$0.00	\$0.00
<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>
<u>Funds Supporting Student Transportation</u>	
FY 2024 percent of STIF Funds supporting student transportation	FY 2025 percent of STIF Funds supporting student transportation
<u>Funds Supporting Older and Disabled Persons Transportation</u>	
FY 2024 percent of STIF Funds supporting older and disabled persons transportation	FY 2025 percent of STIF Funds supporting student transportation
<u>Funds from Previous Biennia</u>	
FY 2024 STIF Funds From Previous Cycle	FY 2025 STIF Funds From Previous Cycle
\$0.00	\$0.00
<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	<i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>

In the example provided in Figure 27:

- Project Name is pulled from Section 6.1 Project Detail Entry.
- STIF Project Grand Total is based on Section 6.1.2 Expenditure Estimates.
- FY 2024 STIF Project Total is based on Section 6.1.2 Expenditure Estimates.
- FY 2025 STIF Project Total is based on Section 6.1.2 Expenditure Estimates.
- FY 2024 percent of STIF Funds supporting student transportation is based on Section 6.2 Allocation of STIF Funds by Project.
- FY 2025 percent of STIF Funds supporting student transportation is based on Section 6.2 Allocation of STIF Funds by Project.

Note: All of the steps from Section 6.1 Project Detail Entry to Section 6.4 Project Summary are for one project only. If there is only one project total on the STIF Plan, continue to Section 7 STIF Plan Summary. If there are additional projects to be added, select the "+Add Project" button and repeat these instructions starting at Section 6.1 Project Detail Entry.

7. STIF Plan Summary

The data in this section will auto-calculate based on the data that have been entered for each project (Figure 28).

Figure 28: Auto-Calculated STIF Plan Summary

7. STIF Plan Summary	
STIF Plan Total \$0.00	Amount Carried Forward \$0.00
FY 2024 Total STIF Funds \$0.00	FY 2025 Total STIF Funds \$0.00
FY 2024 Student STIF Funds \$0.00	FY 2025 Student STIF Funds \$0.00
FY 2024 Percent of STIF Funds supporting student transportation	FY 2025 Percent of STIF Funds supporting student transportation
FY 2024 Older and Disabled Persons STIF Funds \$0.00	FY 2025 Older and Disabled Persons STIF Funds \$0.00
FY 2024 Total STIF Funds From Previous Cycle \$0.00 <i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>	FY 2025 Total STIF From Previous Cycle \$0.00 <i>Includes FY 21-23 Unspent Funds, Interest Accrued, Program Reserve</i>
Please explain why your allocation of STIF Funds to support student transportation is less than 1%. *	
Limit 500 Characters	

This section also summarizes the percentage of STIF Formula funds that will be dedicated to transportation services for students in grades 9 through 12 each year of the STIF Plan. If less than one percent of STIF Plan Formula funds are proposed in any single fiscal year, a text box will appear requiring you to explain why it isn't practicable to dedicate at least one percent of Formula Fund money for this purpose each fiscal year. Consider the definition of Student Transit Services in OAR 732-040-005 when writing an explanation.

This STIF Plan serves as a legally binding agreement between the Qualified Entity and the State of Oregon, acting by and through its Department of Transportation (Figure 29).

Figure 29: STIF Plan Serves as a Legally Binding Agreement

Effective Date

This STIF Plan shall become effective as of the date it is approved by the Oregon Transportation Commission and it shall terminate as of the end date specified in Section 5 of the approved STIF Plan.

Signature

This STIF Plan serves as a legally binding agreement between the Qualified Entity and the State of Oregon, acting by and through its Department of Transportation.

Download the signature page here: [STIF Plan Signature Page](#)

Upload signature page here. *

or drag files here.

Limit 100 MB

The person who signs the STIF Plan is certifying that they are authorized to execute this STIF Plan on behalf of their Qualified Entity and at the direction of their Governing Body. They also are legally binding their Qualified Entity and acknowledging and representing on behalf of their Qualified Entity each of the following:

- The Qualified Entity, through its agents, officers, or employees responsible to administer the STIF Plan and oversee completion of the projects included in the STIF Plan, has read and understands [ORS 184.751 through ORS 184.766](#) and OAR chapter 732, divisions 40 and 42.
- The Qualified Entity agrees to be bound by ORS 184.751 through ORS 184.766 and OAR chapter 732, divisions 40 and 42 and any other laws applicable to STIF Formula Fund program administration and to the completion of the projects described in this STIF Plan.
- The STIF Plan is complete and includes all of the required documentation and information.
- The STIF Plan does not contain and is not based on any false or fraudulent information.
- The STIF Plan does not contain any statement or representation that is untrue in whole or part.
- The STIF Plan does not omit information that could have a material effect on the value, validity, or authenticity of the STIF Formula Fund distributions made to the Qualified Entity.
- The Qualified Entity agrees to deliver the projects described in this STIF Plan within the identified timelines.
- The Qualified Entity understands that it may request STIF Formula Fund distributions from ODOT after the Oregon Transportation Commission (OTC) has approved the STIF Plan but may not make a request prior to July 1, 2023.
- Payments to the Qualified Entity are conditioned on the Qualified Entity satisfying all terms and conditions of this agreement.

- The Qualified Entity is required to repay, in full, any distributions paid to the Qualified Entity if the Oregon Transportation Commission determines that the recipient has failed to meet any terms or conditions of this agreement.

Select the link next to “Download the signature page here” and have an authorized person complete and sign the form (Figure 30). Upload the signed signature page using the “Upload” button.

Figure 30: Download and Upload the Signature Page

Signature

This STIF Plan serves as a legally binding agreement between the Qualified Entity and the State of Oregon, acting by and through its Department of Transportation.

Download the signature page here:

[STIF Plan Signature Page](#)

Upload signature page here. *

or drag files here.

Limit 100 MB

When the STIF Plan has been completed, press the “Save” button one last time before selecting the “Submit STIF Plan” button at the bottom of the form (Figure 31).

Figure 31: Saving and Submitting the STIF Plan

Submit STIF Plan

Save