



November 2025



2025-27 Statewide Transportation Improvement Fund Plan Amendment Guidance and Instructions

This document provides information about the process and rules for mid-biennium STIF Formula Plan amendments and includes a step-by-step walk through for using the web-based STIF Plan form to submit an amended STIF Plan.

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Introduction

Statewide Transportation Improvement Fund (STIF) program rules allow Qualified Entities (QEs) to amend their STIF Plans mid-biennium to account for either (1) additional, unexpected revenue based or (2) prior biennium funding that the QE did not initially include in its STIF Plan. Through an amendment, QEs will be able to access those funds under their current STIF Plans, rather than waiting until their next Plan is adopted. This document provides guidance to QEs for amending their 2025-27 STIF Plans. It discusses the rules that govern STIF Plan amendments and some strategies for effective Plan amendments. It also walks through the portions of the STIF Plan and Subrecipient Project Application Cognito forms that are relevant to the amendment process.

Key dates

STIF Plan amendment application open	Nov 25, 2025
Webinar	Dec 9, 2025
Q&A	Jan, 2026
Amended STIF Plans due*	March 2, 2026
Public Transportation Advisory Committee (PTAC) review	May 2026
Oregon Transportation Commission (OTC) decision	June 2026

** QEs may submit amended Plans until 4/1/26. However, the Public Transportation Division (PTD) cannot guarantee that an amended Plan submitted after 3/2/26 will be reviewed by PTD in time for PTAC review in May and OTC decision in June. PTD strongly recommends that QEs submit their amended Plans by the 3/2/26 deadline.*

Key terms

- **STIF Formula allocation estimate:** The estimate of the amount of STIF Formula funding that each QE will receive. Allocation estimates assist QEs as they develop and amend their STIF Plans, but they do not guarantee that the QE will receive the estimated funding. Disbursement amounts are determined based on STIF formula revenue collections.
- **STIF Plan maximum:** The total amount of funding sought in a Qualified Entity's STIF Plan that was approved by the OTC. The STIF Plan maximum caps the amount of STIF Formula funding that ODOT is allowed to disburse to a QE under its Plan.

- Prior biennium funding: Any funding that was distributed to a QE under a prior STIF Plan that was not spent.
- Outcome measures: The measurable benefits associated with a task in a STIF Plan. For example, the rides, miles, and hours resulting from an operations task or the number of vehicles purchased resulting from a vehicle purchase task.
- Expenditure criteria: There are eight Legislatively established criteria in STIF statute for which QEs are required to report their expenditures. A QE must identify the percentage of each STIF Formula project budget that advances these criteria in the “fund allocation” table in the STIF Plan.

Background

The Oregon Legislature passed HB 3991 on September 29, 2025. If implemented, this legislation will increase the STIF payroll tax described in ORS 322.550 from 0.1% to 0.2% for two years starting January 1, 2026 and ending December 31, 2027 and lead to a substantial increase to STIF Formula fund allocations for the second half of the 2025-27 biennium (July 2026-June 2027). ODOT also intends to adjust the indexed minimum amount of STIF formula population and payroll funds as needed to reflect increased payroll tax revenue. For more information, please review the STIF Formula HB 3991 allocation estimate and the STIF Formula base allocation estimate, both released November 25, 2025.

Prior to the 2023-25 biennium, amendments to STIF Plans were not permitted. However, the OTC adopted a rule change allowing amendments in some circumstances, first as a temporary rule in May 2024, and then as a permanent rule in October 2024. This rule allows QEs to amend their STIF Plans for limited reasons, including to take into account additional, unexpected revenue, as described below.

Amending your STIF Plan

1. Rules governing amendments

Pursuant to OAR 732-042-0045, Qualified Entities may amend their STIF Plans during the biennium, but those amendments are limited by rule. QEs may amend their plans to either (1) adjust the total amount of funding sought in the Plan (STIF Plan maximum) based on ODOT’s most recent STIF Formula allocation estimate; or (2) adjust the amount of prior biennium funding included in the Plan.

QEs may not (1) add projects or tasks to their Plans; or (2) alter project or task descriptions other than adjusting their budgets, as well as updating outcome measures and expenditure criteria associated with a task or project for which the QE has adjusted the budget.

QEs may amend outcome measures of a task in a way that matches the original project or task description. For example, for a broadly written “vehicle purchase” task, a QE may increase the number of vehicles to be purchased. However, if the task is confined to a limited number of vehicles in the “task description,” then the QE may not amend the outcome measures for that task to add additional vehicles.

2. STIF Plan amendment process

The application window for STIF Plan amendments opens on Nov 25, 2025. PTD will host a webinar discussing the Plan amendment process on Dec 9, 2025 and a Q&A in January, 2026. PTD staff will be available throughout the application window to answer questions and provide technical assistance.

Because QEs are not permitted to add new projects to their Plans or make substantive changes to their current projects, STIF Plan amendments do not need to be recommended by the QE’s STIF Advisory Committee before submission to PTD. However, they must be approved by the QE’s governing body and proof of adoption by the governing body must be attached to the Amended STIF Plan.

QEs must submit an amended STIF Plan by March 2, 2026, for PTD to be able to guarantee that an amended Plan will be reviewed by PTAC and the OTC before July 2026. Amended plans submitted after March 2, 2026 may not provide enough time for PTD staff to review and bring to PTAC and OTC. Any amended Plans submitted after April 1, 2026, will not be considered. After amended Plans are submitted, PTD staff will review the amended Plans and reach out if there are any issues that need to be resolved.

Following PTD staff review, PTD will submit the amended Plans to PTAC, which will make a recommendation whether they should be approved at its meeting in May 2026. The OTC will then decide whether to approve the amended Plans at its June 2026 meeting.

3. Why amend your STIF Plan?

The STIF Plan amendment process allows QEs to increase their STIF Plan maximum to reflect the anticipated increase in their STIF formula allocation that resulting from the HB 3991 temporary payroll tax increase. It also allows QEs to add prior biennium funding to their STIF Plans, if they underestimated the amount of funding that would carry forward from the prior biennium when developing their current STIF Plans.

PTD anticipates that STIF Formula distributions reflecting the 0.2% payroll tax rate will begin July 2026. If a QE does not amend its STIF Plan, it risks hitting its STIF Plan maximum before the end of the biennium. In that event, PTD will not be authorized to distribute any additional STIF Formula funds after that point, and PTD will hold funds above the QE's STIF Plan maximum and distribute them at the beginning of the next biennium for which the QE has an approved STIF Plan (e.g., 2027-2029 biennium). Thus, amending their STIF Plans will help QEs to maintain the stability and consistency of their funding distributions and manage their project budgets.

In addition, if a QE does not amend its STIF Plan to incorporate any prior biennium funding that it did not anticipate when initially developing and submitting its Plan, then it may not spend that carry forward funding as part of its 2025-27 STIF Plan. Instead, the QE will have to incorporate those prior biennium funds into its next STIF Plan and wait until the OTC approves that Plan to spend that funding. By amending its Plan, a QE can gain access to those funds in June 2026, instead of July 2027.

The STIF Plan amendment process also provides QEs with an opportunity to adjust their STIF Plan project budgets. Project budgets may be adjusted to account for increases to the STIF Plan maximum and the amount of prior biennium funding included in their Plans.

Tips for Amending a STIF Plan

Flexibly written projects

You may want to consider adding additional funds into a task(s) within your STIF Plan that allows some flexibility regarding its use. For example, if you have task that supports the operations of multiple services, then including funds in that task will allow for them to be spent across those services. You may also want to consider including those funds

in an open-ended capital task. Please reach out to STIF Program Analyst, Ben Goldberg (ben.h.goldberg@ODOT.oregon.gov), or your [Regional Transit Coordinator](#) for assistance identifying projects that will provide the most flexibility within your Plan.

Planning for possible fund transfers

Funding within a STIF Plan can be shifted within projects and between tasks with the same category, as described in guidance. It may be valuable to consider the potential to transfer funds to another task or project within your Plan when you decide how to incorporate additional funding. Please review [PTD guidance](#) for more information.

Matching projects

PTD will not limit the amount of funding in a task characterized as matching funds for another funding award that can be spent on the “underlying” project. For example, if your agency has a STIF Plan task in which you have budgeted \$20,000 in matching funds for a federally funded vehicle purchase, you may amend your Plan to include additional funding in that STIF Plan task to reduce or eliminate the amount of federal funds needed to complete the vehicle purposes.

Program reserve projects

You may also add additional funds to a program reserve task. With permission from PTD, these funds can be transferred to another project in your STIF Plan that fits within the description of the program reserve task. If you cannot immediately identify a use for the increased funds in the other projects in your Plan, adding funding to a program reserve may be the best option available.

Amending your Plan in Cognito forms

To access your STIF Plan or Subrecipient Project Application, complete the “[STIF Plan Amendment Request Form](#)” or “[Subrecipient Amendment Request Form](#).” After you complete the form, you will receive a link giving you access to your application in Cognito forms so that you can make changes. All the information that was included in the OTC-approved version of your STIF Plan will already be filled out when you access your application.

The STIF Plan and Subrecipient Project Application forms do not save automatically. Always remember to save your work by clicking the button at the bottom of the form before closing the application.

If you need any assistance with the STIF Plan or the Subrecipient Project Application, please contact your Regional Transit Coordinator or Brian Roth:

brian.roth@odot.oregon.gov.

Because STIF Plans may only be amended in the limited ways allowed by rule, only the fields necessary for the corresponding sections of the STIF Plan and Subrecipient Project Application forms may be edited.

The remainder of this document walks through the fields of the Cognito form that may be edited when you amend your STIF Plan or Subrecipient Project Application. Fields that appear only in the STIF Plan are noted in **blue text**. Fields that appear in both the STIF Plan and the Subrecipient Project Application are noted in **red text**, and the number from the corresponding Subrecipient Project Application section is also listed.

Section 5. STIF Plan Period and Adoption

The first section of the Plan that can be edited is Section 5 (“STIF Plan Period and Adoption”), specifically Section 5.2 (“STIF Plan Adoption”). It is shown in Figure 1. You will need to update the fields in this section to reflect the date for Governing Body approval of your amended STIF Plan, where documentation of the approval is available, and whether the Governing Body modified the recommendation for the STIF Plan Advisory Committee.

If your STIF Advisory Committee offered a recommendation on the amended STIF Plan, you must also update the STIF Plan Advisory Committee recommendation date field and make an indication whether the Governing Body modified that recommendation.

Remember, Advisory Committee review of an amended Plan is not required.

The relevant fields are highlighted in Figure 1 below. **These fields appear only in the STIF Plan.**

Figure 1: STIF Plan Adoption

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, 2025.

Start Date: *

7/1/2025

End Date *

6/30/2027

5.2 STIF Plan Adoption

STIF Plan Advisory Committee recommendation date *

12/22/2022

STIF Plan Governing Body adoption date *

1/10/2023

STIF Plan Advisory Committee recommendation date for Amended Plan

STIF Plan Governing Body adoption date for Amended Plan *

Website where Governing Body adoption document is located *

<https://www.co.linn.or.us>

Upload Governing Body adoption document if website is unavailable.

Upload

or drag files here.

Limit 100 MB

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

No

Section 6. Projects

Next, you can make changes to Section 6 of the Plan ("Projects") to adjust project budgets, outcome measures, and fund allocations as permitted by rule.

6.1 Project Detail Entry

If you are editing any projects that are included in a Subrecipient Project Application, you must update financial information in these fields to match the application totals reflecting any updated subrecipient project budgets as shown in Figure 2. [These fields appear only in the STIF Plan.](#)

Figure 2: Sub-Recipient Detail Entry

6.1 Project Detail Entry

Sub-Recipient 1

Upload Project Application Here *

or drag files here.

Sub-Recipient Name *

Sub-Recipient Project Application Grand Total *	Planned Carry Forward *
<div></div>	<div></div>

FY 2026 Total STIF Funds *	FY 2027 Total STIF Funds *
<div></div>	<div></div>

FY 2026 Student STIF Funds *	FY 2027 Student STIF Funds *
<div></div>	<div></div>

FY 2026 Percent of STIF Funds supporting student transportation *	FY 2027 Percent of STIF Funds supporting student transportation *
<div></div>	<div></div>

FY 2026 Older and Disabled Persons STIF Funds	FY 2027 Older and Disabled Persons STIF Funds
<div></div>	<div></div>

FY 2026 Total STIF Funds From Previous Cycle *	FY 2027 Total STIF Funds From Previous Cycle *
<div></div>	<div></div>

Includes Prior Biennia STIF Funds, Prior Biennia Interest Accrued (FY 23-25)

Includes Prior Biennia STIF Funds, Prior Biennia Interest Accrued (FY 23-25)

If you intend to budget additional funds for a planned carry forward project, then you must update the field for the amount of funding you plan to carry forward, which is shown in Figure 3.

These fields appear in Section 6.1 of the STIF Plan, and Section 4.1 of the Subrecipient Project Application Form.

Figure 3: Planned Carry Forward

Do you plan to set aside funding that you receive during this biennium to pay for expenses related to this project in a future biennium? *

☒ Yes

☐ No

Please be aware that you will need to add a new project for each planned carry forward expense. For example, if you intend to use carry forward funds to (1) accumulate sufficient funds for a capital project that costs more than can be funded during a single STIF Formula funding cycle; (2) make bond payments on the acquisition of a capital asset; and (3) pay for a planning expense during the next biennium, you will need to add a project for each of these planned uses of your carry forward funding.

What is the amount of funding that you plan to carry forward? *

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

If you are making any changes to your project budgets that impact the percentage of the project budget to improve, expand, or maintain service, you must update the percentage shown in Figure 4.

This field appear in Section 6.1 of the STIF Plan, and Section 4.1 of the Subrecipient Project Application Form.

Figure 4: Project budget share to improve, expand or maintain service

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

Improve or Expand Service *	Maintain Service
<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> 100% ▼ </div>	<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> 0% </div>

If you are making changes to the budget of a Multi-Phase Project, you must update the field for the "Total Project Budget (All Phases)," which is highlighted in Figure 5.

This fields appear in Section 6.1 of the STIF Plan, and Section 4.1 of the Subrecipient Project Application Form.

Figure 5: Multiphase Project

Multi-Phase Project

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

Yes

Project Timeline *

2025-2029

Total Project Budget (All Phases) *

Other Planned Funding Sources *

☐ STIF ☐ Federal ☐ Other State ☐ Local

What phase of the project is funded by this STIF Plan? *

Example: This is phase one of the project, which includes service start up and service element refinement.

Limit 200 Characters

6.1.1 Project Scope

All of the fields in Section 6.1.1 also appear in the Subrecipient Project Application in Section 4.1.1.

For each task in your STIF Plan you can make budgetary changes. For tasks categorized as "Communications," "Mobility Management," "Operations," "Planning," "Preventive Maintenance," and "Project Administration," and Capital: Other Capital Items (Bus)" you will see a field titled "Task Category Amount," which is shown in Figure 6. You must update that field to reflect any changes to the budget for the task.

Figure 6: Task Category Amount

Communications Task Category

Task Category Amount *

For projects categorized as "Equipment Purchase," "Facility Purchase," and "Signs/Shelters Purchase, you will see the fields shown in Figure 7 below. You may edit the "Quantity" and "Unit Cost" fields if needed to reflect changes to the budget for the task.

Figure 7: Equipment Information

Equipment Purchase			
Equipment Information			
Description *	Quantity *	Unit Cost *	Total Cost
<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0.00
			\$0.00

For tasks categorized as "Vehicle Purchase," you will see the "Vehicle Information Table" shown in Figure 8. You can make changes to the "Quantity" and "Cost Each" field of this table to reflect any changes to your budget.

Figure 8: Vehicle Information

11.13 Vehicle Information								
Vehicle ALI *	Make/Model *	Quantity *	Cost Each *	Total	Length *	# of seats / # ADA stations	# of seats with ADA deployed *	Fuel System *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0.00	<input type="text"/>	eg 20/2	<input type="text"/>	<input type="text"/>
				\$0.00				

6.1.2 Expenditure Estimates

You may next update the table titled "Expenditures by Fund Source and Fiscal Year," shown in Figure 9, to reflect any changes to the budget. If you are adding STIF Formula funds to reflect your updated STIF Formula funding allocation, enter those funds into the line for "STIF Populations Funds" or "STIF Payroll Funds." If you are incorporating additional prior biennium funds, add those funds to either the "Prior Biennia STIF Funds" or "Prior Biennia Interest Accrued" lines, as appropriate.

The fields in Section 6.1.2 of the STIF Plan also appear in Section 4.1.2 of the Subrecipient Project Application.

Figure 9: Expenditures by Fund Source and Fiscal Year

Expenditures by Fund Source and Fiscal Year			
Fund Type *	FY 2026 *	FY 2027 *	Total
STIF Population Funds			\$0.00
STIF Payroll Funds			\$0.00
Federal			\$0.00
Other State			\$0.00
Local			\$0.00
Other Funds			\$0.00
Prior Biennia STIF Funds			\$0.00
Prior Biennia Interest Accrued			\$0.00
	\$0.00	\$0.00	\$0.00

6.1.3 Outcome Measures

All of the fields in Section 6.1.3 of the STIF Plan also appear in Section 4.1.3 of the Subrecipient Project Application.

If, because of the changes to your task budget, you anticipate any changes to the resulting outcomes achieved, you must also update “Outcome Measures” section of the Plan. The “Outcome Measures” fields will look different depending on your project category.

For projects categorized as “Operations,” you will see the fields shown in Figure 10.

Figure 10: Operations Outcome Measures

6.1.3 Outcome Measures

Minimum required measures for operations tasks

Revenue Miles *	Revenue Hours *	Rides *
<input type="text"/>	<input type="text"/>	<input type="text"/>

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? *

For projects categorized as “Communications,” you will see the fields shown in figure 11.

Figure 11: Communications Outcome Measures

⊗ **Outcome Measure 1**

Communications

Number of impressions (# of times a person receives the information, tracked by advertisers) or other measures that indicate how many people receive information about transit service.

Number of new users due to communications (could be determined by asking a question about how the rider learned about this service as part of a regular onboard survey)

For projects categorized as “Mobility Management,” you will see the fields shown in Figure 12.

Figure 12: Mobility Management Outcome Measures

⊗ **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

For all projects you will also see any of the fields that you selected from the drop-down menu shown in Figure 13.

Figure 13: Outcome Measures for all other Project types

Outcome Measure 1

All Project Types

Other Measure

Capital Improvements Completed

Connections Added

FTEs/Contractors Added

Low-Income Fares Provided

Marketing Materials Created

Service Miles Added

Paratransit Rides Provided

Plans Created

Public Outreach Events

Reserve Funds Created

Ridership Number Increased

Ridership Percentage Increased

Routes Added

Services Added

Stops Added

Vehicles Purchased

6.2 Allocation of STIF funds by project

The fields in Section 6.2 of the STIF Plan also appear in Section 4.2 of the Subrecipient Project Application.

If any of the changes to your project budget will affect the portion of the project you anticipate will be spent on any of the expenditure criteria described in Section 6.2 “Allocation of STIF funds by project,” please update the percentages assigned to those criteria in the “Fund Allocation” Table, shown in Figure 14 to reflect those changes.

Figure 14: Fund Allocation Table

Fund Allocation (Must not exceed 100% per criterion per fiscal year)
 If some criteria don't apply to this project, fill in with zeros. Do not add or remove any criteria from the table.

Criterion	FY 2026 *	FY 2027 *
Criterion 1	0.0%	0.0%
Criterion 2	0.0%	0.0%
Criterion 3	0.0%	0.0%
Criterion 4	0.0%	0.0%
Criterion 5	0.0%	0.0%
Criterion 6	0.0%	0.0%
Criterion 7	0.0%	0.0%
Criterion 8	0.0%	0.0%
	0.00%	0.00%

Remember that the total funding in your STIF Plan for criterion 7 (student transit services) across your projects should still equal or exceed 1% of your total planned expenditures, unless doing so is not practicable. In addition, the total funding for criterion 8 (services for older adults and people with disabilities) must equal or exceed your estimated allocation of STIF Population funds.

Making changes to the task budgets and the Project Fund Allocation table will automatically update the totals in Section 6.4 ("Project Summary") and Section 7 ("STIF Plan Summary"). Making Changes in the Subrecipient Project Application will automatically update the totals in Section 4.4 ("Project Summary") and Section 5 ("All Project Totals").

Section 7. STIF Plan Summary

If, after adjusting your project budgets to include new funds, it is no longer practicable for you to allocate at least 1% of your estimated STIF fund disbursement to programs to provide service to students for grades 9-12, you must provide an explanation in the field shown in Figure 15.

This field appears only in the STIF Plan.

Figure 15: Explain student transportation less than 1%

Unless it is not practicable, each year, the percentage of STIF Funds supporting student transportation must equal or exceed 1% of the FY Total STIF Funds.

Please explain why your allocation of STIF Funds to support student transportation is less than 1%. *



Limit 500 Characters

When you are ready to submit your amended STIF Plan upload the STIF Plan Signature Page and click the Submit STIF Plan button, as shown in Figure 16.

Figure 16: Submit STIF Plan

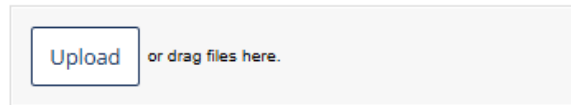
Signature

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. *



Limit 100 MB

Submit STIF Plan

Save

To submit an amended Subrecipient Project Application, complete the authorized representative fields shown in Figure 17.

Figure 17: Submit Subrecipient Project Application

☐ By signing below, I certify that I am authorized to submit this Subrecipient Project Application to on behalf of .

Name of authorized representative * **Title of authorized representative ***

Signature * **Signature Date ***

draw type

If you discover that you need to make any corrections to your amended STIF Plan or amended Subrecipient Project Application after you have submitted the form, please contact your Regional Transit Coordinator or Brian Roth: brian.roth@odot.oregon.gov.