

# STIF Discretionary and Statewide Transit Network Program Reporting Overview, January 16, 2020

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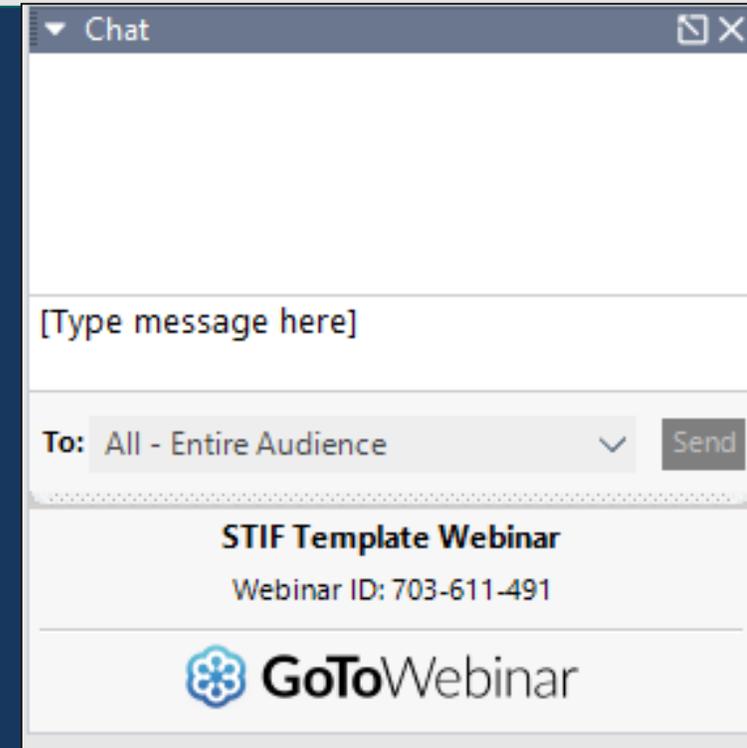
Presented by:

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Janel Hull, Webinar Support

# How to Ask Questions

- You will be muted during the webinar
- If you have a question, use the question box
- Questions will be answered at the end of the webinar



# Webinar Topics

- Reporting through the quarterly Agency Periodic Report (APR)
- Project progress reporting
- Outcomes achieved reporting
- Submitting project documentation
- STIF low-income tax mitigation reporting
- Demo of new STIF additions to the APR

# STIF Discretionary/STN Reporting through the APR

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- Grant management process largely mirrors that of past discretionary grants
- Existing APR requirements are unchanged
- Recipients will use the APR's Grant Information tab to report project progress and outcomes achieved

# Project Progress and Outcomes Achieved

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- Project Progress indicated through:
  - Reimbursement requests
  - Updates on project deliverables provided by recipient
  - Example: Purchase and installation of a new bus shelter near the public library.
- Outcomes Achieved – broader benefits of project to public and statewide transit network
  - All recipients will provide narrative responses describing outcomes
  - Transportation service project recipients will provide additional service data
  - Example: The installation of the new bus shelter has improved the safety of the bus stop and the number of boardings at that stop this quarter increased by 5% from last quarter.

## Outcomes Achieved Reporting (cont.)

- See Supplemental Guidance on Outcomes Achieved Reporting
- Suggested areas for reporting include:
  - Six project selection criteria
  - Connectivity (inc. with other modes)
  - Accessibility for underserved communities
  - Ease of use
  - Technological advancements

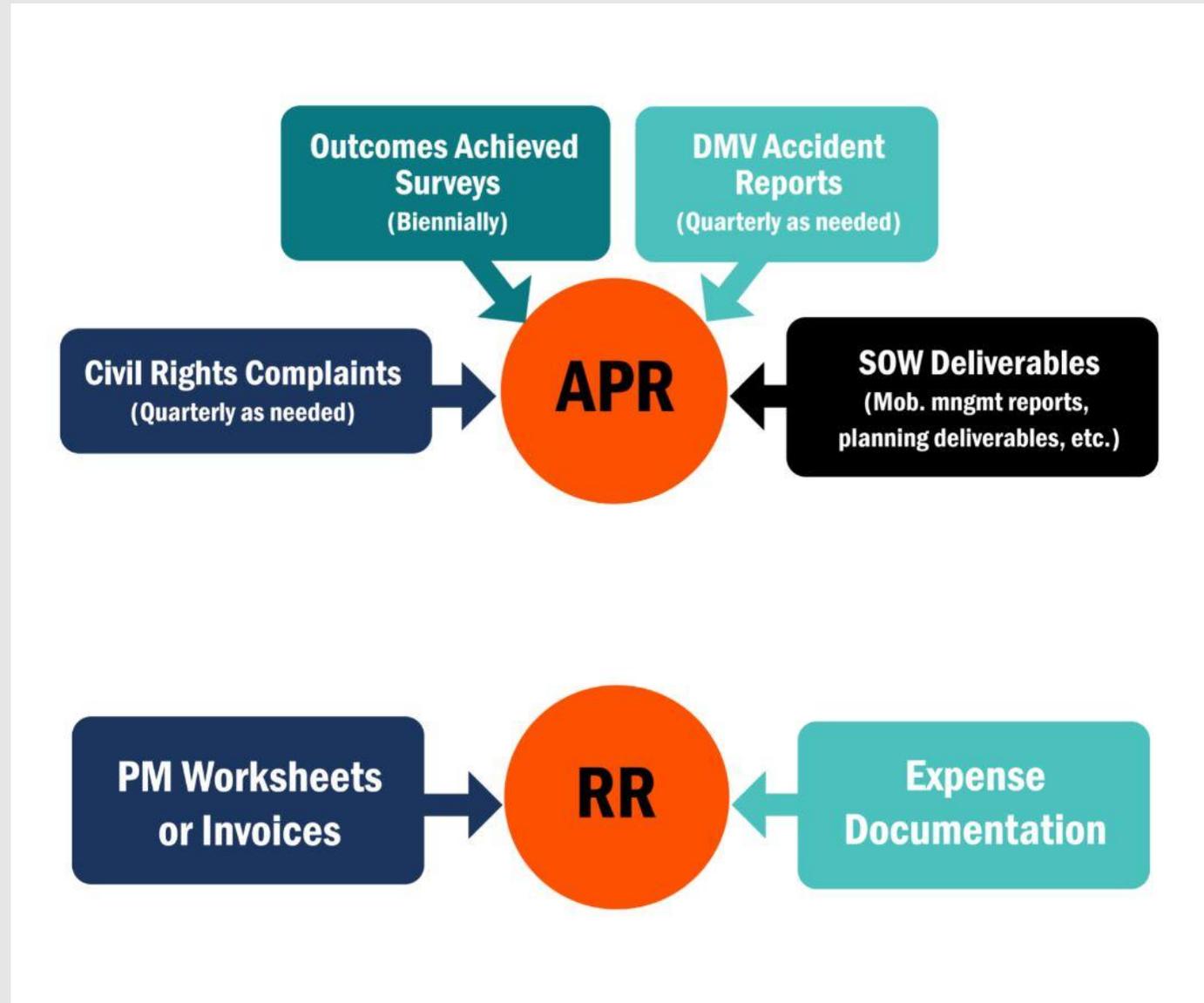


# Outcomes Achieved Reporting (cont.)

- Why report on outcomes achieved:
  - Relevant OPTP goals
  - Reporting to the Oregon legislature
  - Increasing need for funding
- Optional biennial outcomes achieved survey



# What documents do I attach to my OPTIS agency periodic report (APR) and reimbursement request (RR)?



# Annual STIF Low-Income Mitigation Report

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- Due date for the first annual report is August 14, 2020
- Purpose of report
  - Actions taken by any PTSPs located within the area of that QE to mitigate the impact of the STIF tax on passengers who reside in low-income communities
- Roles and responsibilities
  - PTSPs submit form to their QE
  - QE completes cover letter and form, bundles all PTSP forms, and submits consolidated report to ODOT

# Low-Income Impact Mitigation Form

**Statewide Transportation Improvement Fund  
Public Transportation Service Providers  
Low-Income Impact Mitigation Form**

**INSTRUCTIONS:** Complete all sections of this form, providing as much detail as is feasible. Once completed, return the completed form to the Qualified Entity identified in the form. PTSPs are advised to submit this form 30 days prior to the 4th quarter SPR deadline of August 14, 2020.

<b>Name of PTSP:</b>		
<b>Fund Source(s) Received (check all that apply):</b>		
STIF Formula <input type="checkbox"/>	STIF Discretionary <input type="checkbox"/>	STIF Intercommunity Discretionary <input type="checkbox"/>
<b>Name of Qualified Entity (based on location of PTSP):</b>		
<b>Describe the actions, if any, that this PTSP has taken to mitigate the impact of the STIF tax on passengers residing in low-income communities. If no such actions have been taken, write "N/A."</b>		
<b>Signature:</b>	<b>Date:</b>	
<input type="text"/>	<input type="text"/>	

<https://www.oregon.gov/ODOT/RPTD/RPTD%20Committee%20Meeting%20Documents/STIF-Low-Income-Mitigation-Form.pdf>

# PTSP Reference Guide

## STIF Low-Income Impact Mitigation Qualified Entities and Public Transportation Service Providers

Each PTSP including QEs receiving STIF funds must complete the STIF Low-Income Impact Mitigation Form and return to the appropriate QE. QEs are responsible for bundling and submitting reports from all PTSPs in their area of responsibility. This table shows the Qualified Entities (QEs) and their applicable Public Transportation Service Providers (PTSPs) specifically for the low-income impact mitigation form requirement. The QE report is due to ODOT no later than 60 days after the end of each Fiscal Year.

Name of QE	STIF Plan Contact	Contact Email	Applicable PTSPs
Benton County	Lisa Scherf	<a href="mailto:lisa.scherf@corvallisoregon.gov">lisa.scherf@corvallisoregon.gov</a>	<ul style="list-style-type: none"> <li>City of Corvallis</li> <li>City of Philomath</li> <li>Oregon Cascades West Council of Government</li> <li>Oregon State University (Discretionary)</li> </ul>
Confederated Tribes of the Coos, Lower Umpqua and Siuslaw Indians	Jeff Stump	<a href="mailto:jstump@ctclusi.org">jstump@ctclusi.org</a>	<ul style="list-style-type: none"> <li>Coos County Area Transit</li> </ul>
Confederated Tribes of the Warm Springs Reservation	Michele Stacona	<a href="mailto:michele.stacona@wstribes.org">michele.stacona@wstribes.org</a>	<ul style="list-style-type: none"> <li>Central Oregon Intergovernmental Council (Formula Only)</li> </ul>
Crook County	Colleen Ferguson	<a href="mailto:colleen.ferguson@co.crook.or.us">colleen.ferguson@co.crook.or.us</a>	<ul style="list-style-type: none"> <li>Central Oregon Intergovernmental Council (Formula Only)</li> </ul>
Deschutes County	Erik Krop	<a href="mailto:erik.kropp@deschutes.org">erik.kropp@deschutes.org</a>	<ul style="list-style-type: none"> <li>Central Oregon Intergovernmental Council (Deschutes Formula and All Discretionary Projects)</li> <li>City of La Pine (Discretionary)</li> </ul>
Jefferson County	Jeff Rasmussen	<a href="mailto:jeff.rasmussen@co.jefferson.or.us">jeff.rasmussen@co.jefferson.or.us</a>	<ul style="list-style-type: none"> <li>Central Oregon Intergovernmental Council (Formula Only)</li> <li>Hood River County Transportation District (Formula and Discretionary)</li> </ul>
Lane Transit District	Aurora Jackson	<a href="mailto:aurora.jackson@ltd.org">aurora.jackson@ltd.org</a>	<ul style="list-style-type: none"> <li>Lane Council of Governments (Formula and Discretionary)</li> <li>City of College Grove</li> </ul>
Linn County	Mark Volmert	<a href="mailto:mvolmert@co.linn.or.us">mvolmert@co.linn.or.us</a>	<ul style="list-style-type: none"> <li>City of Albany (Formula and Discretionary)</li> <li>City of Lebanon</li> <li>Oregon Cascades West Council of Government (Discretionary)</li> </ul>

# Demo of STIF additions to the APR

- [Hyperlink](#) to OPTIS login (for use during webinar only).



# Resources

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- STIF Discretionary and Statewide Transit Network Reporting Guidance  
<https://www.oregon.gov/ODOT/RPTD/RPTD%20Committee%20Meeting%20Documents/STIF-Disc-STN-Reporting-Guidance.pdf>
- Supplemental Guidance on Outcomes Achieved Reporting  
<https://www.oregon.gov/ODOT/RPTD/RPTD%20Committee%20Meeting%20Documents/STIF-Reporting-Outcomes-Achieved-Supplement.pdf>
- STIF PTSP Low-Income Impact Mitigation Form  
<https://www.oregon.gov/ODOT/RPTD/RPTD%20Committee%20Meeting%20Documents/STIF-Low-Income-Mitigation-Form.pdf>
- PTSP Reference Guide for Low-Income Impact Mitigation Reporting  
<https://www.oregon.gov/ODOT/RPTD/RPTD%20Committee%20Meeting%20Documents/STIF-Low-Income-Mitigation-Form.pdf>

# APR Technical Assistance

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- David Graf, STIF Fiscal Analyst, 503-986-3472  
[David.J.Graf@odot.state.or.us](mailto:David.J.Graf@odot.state.or.us)
- Amanda Mathis, Support Analyst (Regions 1 and 3) 503-856-3376  
[Amanda.Mathis@odot.state.or.us](mailto:Amanda.Mathis@odot.state.or.us)
- Joe Heberlein, Support Analyst (Regions 2A and 2B), 503-986-3408  
[Joseph.K.Heberlein@odot.state.or.us](mailto:Joseph.K.Heberlein@odot.state.or.us)
- Maggie Charles, Support Analyst (Regions 4 and 5), 503-986-3411  
[Maggie.Charles@odot.state.or.us](mailto:Maggie.Charles@odot.state.or.us)
- For report content-related assistance, contact your Regional Transit Coordinator.

# STIF Program Contacts

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- Patrick DePriest, STIF Discretionary/Intercommunity Program Coordinator, 503-986-3312  
[Patrick.depriest@odot.state.or.us](mailto:Patrick.depriest@odot.state.or.us)
- David Graf, STIF Fiscal Analyst, 503-986-3472  
[David.J.Graf@odot.state.or.us](mailto:David.J.Graf@odot.state.or.us)
- Karyn Criswell, STIF Project Manager, 503-856-6172  
[Karyn.C.Criswell@odot.state.or.us](mailto:Karyn.C.Criswell@odot.state.or.us)