GRANT MANAGEMENT TRAINING
2025

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Survey #1-
How many PTD received grants are you currently managing? (check only one)

A. None
B. 1-3
C. 4-6
D. 7 or more
E. I don't know

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Agenda

- Boilerplate Agreement - Changes for 2025
- Statement of Work (SOW) - Changes for 2025
- NEPA Process
- STIF Rule Change
- STIF Periodic Report
- Agency Periodic Reports (APR)

- Federal Funding Information
- Reimbursement Request in Optis
- Required Backup documents
- Title VI
- Procurement
- Coordinated Plans
- Compliance
- Scholarships and Training

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What are the Steps for Agreement Execution?

| Grant Awarded | Statement of Work Completed from Information on Grant Application | Support Analysts create agreement in OPTIS with Boilerplate & SOW | Agreement is sent to provider for signature | Provider returns agreement for PTD Administrator signature |

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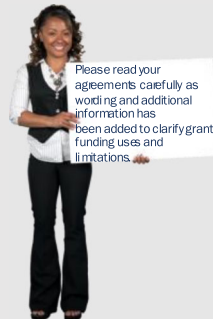

Boilerplate Agreements

- What is a Boilerplate
- Boilerplate agreement language has been updated with 2025 grant agreements

Please read your agreements carefully as wording and additional information has been added to clarify grant funding uses and limitations.

Statements of Work (SOW) Changes 2025

AKA – Scope of Work

- NEPA
- Clarity on required reimbursement documents
- Clearer project milestones
- Project details needed for ODOT completion of FTA grant application

Complete Agreements Contain

Scope or Statement of Work (SOW)
- Outlines the objectives, project details and timelines
- Accurate description explaining what services or deliverables
- Budget and payment terms
- Performance requirements
- Reporting requirements
- Established process for monitoring, frequency, format content of reports

Boilerplate
- Other considerations (liability, confidentiality, dispute resolution, indemnification)
- Outlines specific laws or rules

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NEPA

NEPA Requirements - Overview

- The requirements of the National Environmental Policy Act (NEPA) apply to **all projects** that receive FTA funds
- ODOT/subrecipients must comply with all NEPA requirements and are responsible for providing NEPA documentation to FTA
- Most projects are CEs; NEPA documentation requirements for CEs vary
  - Additional environmental studies may be required (e.g., cultural resource studies, hazmat, etc)

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CE Classification

For projects that meet the criteria to be classified as a CE, FTA completes the NEPA process by classifying the project as a CE, in one of two ways:

1. Providing written confirmation that FTA has determined the project qualifies as a CE under NEPA (i.e., NEPA concurrence, CE concurrence, or CE determination)

-OR-

2. Confirming the CE classification as part of the grant review process in TrAMS, using the information/documentation in the grant application itself

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Projects requiring written CE concurrence (#1) need NEPA documentation. Projects not requiring written CE concurrence (#2) typically do not need NEPA documentation beyond the grant application itself.

What activities do not require written NEPA concurrence of the CE from FTA?

- Operating assistance
- Planning activities
- Engineering, design, drafting environmental documents and completing environmental studies that do not require ground disturbance
- Preventative maintenance that involves NO physical changes and/or alterations to facilities or properties
- Purchase of equipment that is not an interdependent part of a larger project and can be accommodated in existing building(s) or facility (-ies) with NO physical changes, alterations, or installation required

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What activities require written NEPA concurrence of the CE from FTA?

- **Final design activities** – includes design beyond 30%
- **Property acquisition** - includes purchase discussions with property owners that imply or are explicitly binding
- **Purchase of construction materials** – includes, but is not limited to, purchase of any materials used for the activities listed under the definition of project construction below
- **Purchase of rolling stock -** "purchase" occurs when any funds are spent or when a commitment to purchase is made such that funds must be expended should the purchase be cancelled/modified
- **Project construction** – FTA definition includes construction, alteration, or repair (including dredging, excavating, and painting) of buildings, structures, or other real property; excludes the assembly, alteration, or repair of vessels or other kinds of personal property.

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STOP Conducting any of these activities (even with state or local funds) prior to receiving written NEPA concurrence) will prevent FTA from being able to fund the project.

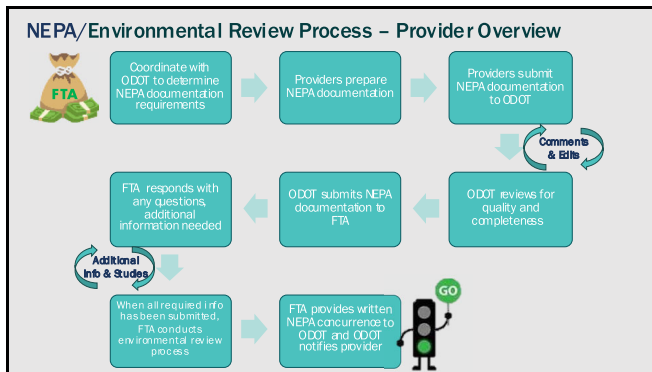## NEPA/Environmental Review Process – Provider Overview

```
FTA → Coordinate with ODOT to determine NEPA documentation requirements → Providers prepare NEPA documentation → Providers submit NEPA documentation to ODOT
                                                                                                                    ↓ Comments & Edits
FTA responds with any questions, additional information needed ← ODOT submits NEPA documentation to FTA ← ODOT reviews for quality and completeness
   ↓ Additional Info & Studies
When all required info has been submitted, FTA conducts environmental review process → FTA provides written NEPA concurrence to ODOT and ODOT notifies provider   GO
```

Examples of additional information/studies that may be needed

- Site Plan
- Section 106
  - Area of Potential Effect (APE)
  - Archaeological or Historic Resource survey or report
- Section 7 of ESA Effect Determination
- Section 4(f)
  - Identification of 4(f) properties and OWJ
  - De minimis impact determination
  - Section 4(f) evaluation

- Identification of water resources (i.e., coastal zones, floodplains, wild and scenic rivers, navigable waterways, wetlands and other WOTUS)
  - Jurisdictional delineation
- Phase I / II Environmental Site Assessment (ESA)
- Noise study
- Traffic study

⭐ Examples only, not an exhaustive list!

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Important NEPA Considerations

- **Timing**
  - Complete FTA submittal to NEPA concurrence = **6 to 10 months**

- **Determining the full scope of a project for NEPA review purposes**
  - NEPA prohibits dividing a project into smaller or separate projects to avoid appearance of significance or to avoid NEPA requirements (i.e., segmentation)
  - Projects must demonstrate independent utility, connect logical termini, and not restrict consideration of alternatives
  - Full scope of project for NEPA review may include local- or state-funded components and/or components from multiple different grants
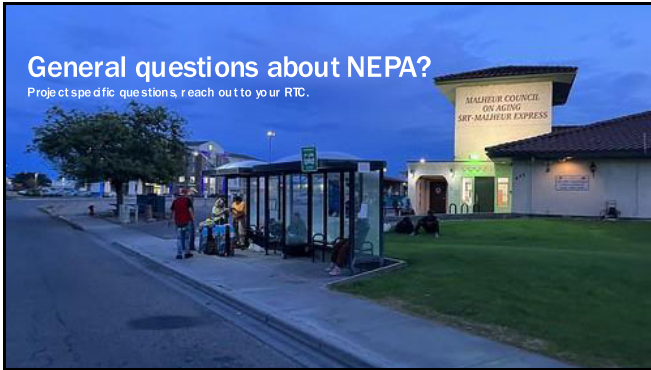
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General questions about NEPA?

Project specific questions, reach out to your RTC.

Survey #2 **Who works on and completes the reports for your agency?**

(Check all that apply)

A. Manager
B. Accountant
C. Finance Department
D. Operations
E. Multiple people
F. I don't know

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STIF Rule Changes & Rule Advisory Committee

- New Requirements for 2025-2027 are signed agreements for the STIF Formula program.
- As part of our continuous improvement efforts to the STIF program, PTD has convened a Rules Advisory Committee.
- The committee will assist ODOT to develop STIF program rules updates to make policy and process improvements. Rules will go to OTC in 2026.
- The Rules Advisory Committee will be accepting public comments during meetings. You may also submit written comments by emailing STIF Program Analyst, Ben Goldberg. Written comments are encouraged and will be made part of the meeting record.

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STIF Periodic
Report (SPR)

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SPR Requirements

- Qualified Entities must record all STIF Plan activities quarterly in the STIF Plan Report (SPR). The reports are due no later than 45 days after the end of the quarter.

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Common SPR Problems

- Lack of information about projects status
- Lack of back-up documentation for PTD to review expenditures
- Late reporting without notification to RTC or no reporting
- Not including vehicle information with expenditures recorded
- Not providing yearly reporting requirements
- Inconsistent and poor-quality data

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Annual Reporting Requirements

- Annual Reporting
  - Agreed upon audit procedures-OAR 732-040-0015(2)
  - Budgets-OAR 732-040-0025(2)
  - Audits-OAR 732-040-0025(3)
  - Low-income mitigation-OAR 732-040-0025(1)
- Submit Audits, AUP and Budgets to ODOTPTDReporting@odot.oregon.gov, Low-income mitigation is attached to the SPR

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Agency Periodic Reports

Survey #3 What is the earliest you can submit your APR/SPR?

(Choose One)
A. 45 days after the end of the quarter
B. Anytime after the quarter ends
C. We must report on grant funding?

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Guide for Agency Periodic Reporting

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| What is an Agency Periodic Report? | Why do I have to do one and how is it used? | Step by step to complete APR | Reimbursement Request overview | Vehicle Purchase Reimbursement Request |

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- **WHAT IS AN AGENCY PERIODIC REPORT (APR)?**
*SPRs are also submitted in OPTIS, are due quarterly

- Required from each agency who:
  - Has received federal or state grant funds
  - Agencies operating a vehicle purchased using federal grant funds
- APRs can be completed anytime prior to 45 days following the end of each quarter
- Your statement of work (SOW) outlines what information is needed for much of the APR

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What and Why of APR

- An APR gives details about:
  - Revenue
  - Expenses
  - Matching funds
  - Performance data
  - Vehicle data
  - Other narrative regarding grant agreements
  - Progress on deliverables in SOW

Your Regional Transit Coordinator use the APR to:
- Complete reimbursement requests. Your agency cannot get paid without a current APR *(exception is some capital expenses)*
- Attest to your agencies on time reporting during site review
- General compliance

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Prepare for completing your APR!

A complete APR saves everyone time and effort

OPTIS User Guide_Updated 2015 (oregon.gov)

Find your Regional Transit Coordinator

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Survey #4 – What is your biggest challenge in reporting?

(Pick your top two)

A. Data entry
B. Attachments
C. Understanding deadlines
D. Clear direction on requirements
E. Budget
F. Asset report

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APR Step by Step

- Log into OPTIS
- Select "Asset Search" from the navigation menu.
- At the find asset screen, leave all fields blank and click "Submit". This will pull up a current list of assets for your agency
- Compare this list with your records- update as needed
- If the assets record is incorrect or incomplete, contact your RTC
- Once all assets are verified, confirm that the current APR does not already exist in OPTIS

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After your asset list is verified

To enter a new report

Wizard Step 7 – Assets

- Enter vehicle information, even if it has not changed
- For your entire vehicle inventory
  - Number of vehicles in service
  - Number of spares or back ups
  - Number of vehicles out of service
- For PTD-funded vehicles only
  - Enter latest odometer reading, date of reading and condition of each vehicle
  - Select "Out of Service" for any asset purchased with grant funds

Wizard Step 8 Accident Reporting

- If you answered yes to any question, click "Add Accident" button
- Enter the VIN for vehicle involved in accident
- Select the type of accident from drop-down menu
- Enter number of fatalities and injuries, if any
- Describe accident or incident and what follow up occurred, if any
- Attach the *required* DMV accident report into the Attachments (asset wizard step 11)
- Click "Next"

Wizard Agency Narrative

- Tell us about your transit program
- Do you have a new service?
- New service partner?
- Service cut back
- This can be historical or record-keeping

	Target Date	Status		Status Notes
Estimated RFP/IFB Date	10/20/2023	Completed		Bids were received.
Estimated Contract Award	01/09/2024	Completed		Completed
Estimated Construction Start Date	03/18/2024	In Process		The project has started
Estimated Project Completion Date	06/30/2027	In Process		In process.
Project Progress		All bids came in over budget. The lowest bidder was awarded the ground site work only which was to be completed 12/31/24. The bidder has completed all work related to the ground preparation where the building will be constructed. One more small project is needed before this project is fully complete.		
Outcomes Achieved		Ground site work has been substantially completed. Weather has to improve before the last part of the project can be completed.		

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Documents needed when completing an APR

- In-Kind Documents
- DMV Accident Reports
- Civil Rights Complaints
- Mobility Management Reports
- Deliverables from Statement of Work
- Budget Detail Worksheet or Equivalent

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Final APR Tips

- Review and verify all information is correct
- If you find an error, select "Maintain" from the navigation menu, open the correct section and make changes
- Add Budget Detail Worksheet or Equivalent and other supporting documentation
- Click "Finish"
- If you are an authorized representative with signing authority, click "Complete Step" when finished. Check the certifying box
- Enter your eResponse Keyword and click "Submit"
- **Contact your RTC for any issues or questions**

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Federal Funding

- Past Practice
  - Reimburse agencies before FTA grants were fully executed
  - Delays in processing grants and volume has reduced funding on hand
- ODOT Policy
  - Federal Funding must be available for reimbursement
  - Grants must be executed by FTA

PTD Actions

Address Grant Backlog/Delays
  - Dedicated additional staff
  - Process improvements
  - FTA prioritization
  - Continual assessment

Hardship Requests
  - Requested on Formula applications

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Federal Funding

- Congressional Apportionment
- FTA Updates
- What this means for funding
- Considerations-
  PTD is looking at high need, interruption of service, availability of reserves. What other factors should be considered to develop funding plans with limited resources?

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Reimbursement Requests

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Reimbursement Request Overview

- You can only submit a reimbursement request if you are current on your reporting
- For most funds, there is a maximum allowable disbursement for the first year of the biennium
- Review your grant's SOW regularly to ensure proper documentation

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OPTIS User Guide_Updated 2015 (oregon.gov)

Prepare for completing your Reimbursement Request!

Have the necessary documentation ready to add to the attachment section

Find your Regional Transit Coordinator

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Policy on Allowable Costs Determination

Purpose: To establish clear procedures for determining which costs are allowable for reimbursement under federal awards, ensuring compliance with the Uniform Guidance (2 CFR Part 200) and specifically addressing the requirements outlined in 2 CFR 200.302(b)(7).

Scope: This policy applies to all staff involved in the management of federal awards, including project managers, financial analysts, and administrative staff responsible for cost analysis and reporting.

- Policy Statement principles outlined in 2 CFR Part 200.
- Written Procedures
- Cost Analysis

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Policy on Allowable Costs Determination

General criteria:

•Be necessary and reasonable for the performance of the Federal award and be allocable thereto under these principles.
•Conform to any limitations or exclusions set forth in these principles or in the Federal award as to types or amount of cost items.
•Be consistent with policies and procedures that apply uniformly to both federally-financed and other activities of the district.
•Be accorded consistent treatment.
•Be determined in accordance with generally accepted accounting principles
•Not be included as a cost or used to meet cost sharing or matching requirements of any other federally-financed program in either the current or prior period.
•Be adequately documented.

•Selected items of cost- is consistent with one of the allowability factors for selected items of costs articulated in 2 CFR 200.420 through 200.475.

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Documents needed for Reimbursement Request

- Check the Statement of Work for the grant
- What type of expense(s) are being requested
- Are your documents easy to interpret by your RTC
  - Items should have description of what is being charge (X number of hours, 14 widgets….)
  - Date
  - Name of agency being billed
  - Name of agency billing for service
  - Quarter service was provided

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SAMPLE PM Log

EquipNo	VIN	Open	Vendor	DESCRIPTION	TOTAL
11-11-01 Total					0.00
11-07-02	1GBE5V123	1/4/2020	Automotive	5,000 miles service	582.13
11-07-02	1GBE5V1237	1/16/2020		power steering pump#15286010	703.00
11-07-02	1GBE5V1237	1/22/2020		brake level sensor RL-129, Napa Halogen sealed beam Headlight, brakeline, brake fluid Qt	401.89
11-07-02 Total					1,686.02
13-09-04 Total					0.00
11-10-04	1FTS38L	1/12/2020	Automotive	5,000 miles service	206.50
11-10-04 Total					206.50
11-09-05	1GBGSU1	1/12/2020	Automotive	labor & transportation, resealed roof, roof sealant	232.50
11-09-05	1GBGSU1	1/19/2020		5,000 miles service	370.13
11-09-05	1GBGSU19	1/23/2020	Oregon Diesel	diagnose cause of emissions system region not working at all and "ding" noise while pulling a grade	202.92
11-09-05	1GBGSU19L	1/25/2020	B & S Automotive	marker light#50-10105R3	42.50
11-09-05 Total					848.05
13-09-06	1GBGSU1968R14577	1/4/2020	Automotive	repaired air leak in seat, cleaned middle heater	120.00
13-09-06	1GBGSU1968R14577	1/9/2020		low beam headlight #H866XU	66.30
13-09-06	1GBGSU1968R14577	1/12/2020		5,000 miles service	401.63
13-09-06	1GBGSU1968R14577	1/19/2020		replace air line to seat & marker light	128.50
13-09-06	1GBGSU1968R14577	1/22/2020		windows switch #301128	209.09
13-09-06	1GBGSU1968R14577	1/25/2020		marker light#50-10105R3	42.50
13-09-06	1GBGSU1968R14577	1/31/2020	Ons Towing	tow hwy	225.00

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SAMPLE INVOICE

Jedi Transit
504 Force Way, Mos Eisley,Tatooine, 1977
Phone - 555-504-1977 |

INVOICE # 327
Date: May 4, 2024

BILL TO	FOR
Obi Wan Kenobi	Contracted Service
25 Jundland Wastes, Tatooine, 1977	April 1, 2024- June 30, 2024
430-327-2187	

ITEM DESCRIPTION	AMOUNT
April - 21 hours of contracted service @ $45.00/hour	$945.00
May - 45 hours of contracted service @ $45.00/ hour	$2,025.00
June - 65 hours contracted service @ 45.00/hour	$2,925.00
April-June Administration Costs contracted - Darth Vader	$6,000.00
Preventive Maintenance April-June Peli Motto -Hanger 3-5	$15,000.00
Subtotal	$26,895.00
Tax rate	
Additional costs	
TOTAL COST	**$26,895.00**

Make all checks payable to Jedi Transit

If you have any questions concerning this invoice, use the following contact information:
Luke Skywalker, luke.skywalker@jeditransit.org

THANK YOU FOR YOUR BUSINESS!
May the Force Be With You!
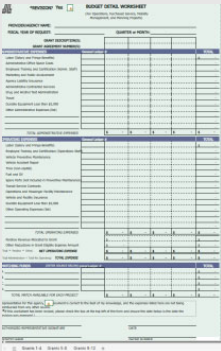
Copy of Budget Detail Worksheet

Back-up Needed for Reimbursement

- Administration
  - Written detailed documentation of time expended
  - If internal GL reports – items highlighted
  - Invoice with details of what is being reimbursed
- Operations
  - Cost is entered into OPTIS directly – receipts must be kept on file locally
  - Contracted Operations require an invoice

Back-up Needed for Reimbursement

- Purchased/Contracted Services
  - Invoice(s) or comparable document including basic description of services and associated expenses, service date(s) and identification of service provider

- Mobility Management
  - In-House: Documentation of completed deliverables
  - Contracted: Documentation of completed deliverables and proof of payment or invoice

- Planning
  - Documentation of completed deliverables and/or vendor invoices. See SOW for specifics

- Preventative Maintenance
  - Preventative Maintenance – PM Worksheet attachment or comparably detailed document

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Vehicle or Equipment Purchase

Vehicle Purchase Items Needed:

- Detailed cover letter
  - Cover letter template (online)
  - Edit cover letter for accurate information
- All invoices associated with the expense

- Pre-Award and Post-Delivery Certification Form
  - Check and initial each box
  - Sign form
  - *Buy America Certification
  - *Disadvantaged Business Enterprise (DBE) certification
  - *Federal Motor Vehicle Safety Standards (FMVSS) Certification
  - This information can be provided by your vendor. *as required per funding source.

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Equipment, Facility Purchase or Construction

- Equipment Purchase
  - Invoice(s)
  - Environmental documents (dependent on project)
  - Final Inspection report(s) (dependent on project)
  - Maintenance Plans should be updated when put into service

- Facility Purchase or Construction
  - Invoice(s)
  - Final inspection report(s)
  - Environmental documents (dependent upon project)
  - Payroll documentation (if subrecipient labor is included)
  - Photos
  - Maintenance Plans should be updated when put into service

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Survey #5 – **Do you know where to find information about assets and vehicle procurement on the PTD Website?**

A. Yes
B. No

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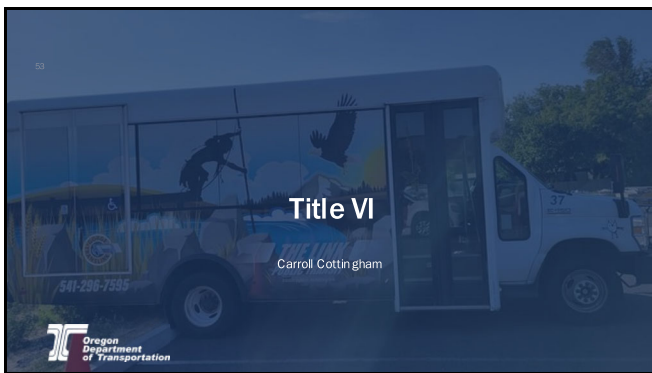of Transportation

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Title VI

Carroll Cottingham

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Title VI Requirements

- A Federal-aid recipient must have a formal plan to prevent discrimination in *all* of its programs and activities.

- Title VI Programs are used to ensure compliance with Title VI of the Civil Rights Act of 1964, and to give transit employees, members of the general public, ODOT and the FTA a consistent and easy "roadmap" of the transit provider's Title VI compliance.

- Pass-through entities are *not* exempt from Title VI, however Title VI Program elements may be developed in a conjunction with pass-through and provider.

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Reporting Schedule

Every 3 Years
Complete Title VI Plan Update

Annually
- Title VI Program Changes
- Complaints and Lawsuits
- Outreach Activities

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Title VI Plan - Required Elements
Every Title VI plan must contain the following:

Notice of Rights Under Title VI	Public Participation Plan
How to File a Complaint	Limited English Proficiency (LEP) Plan
Title VI Complaint Form	Minority Representation Table
List of investigations, complaints or lawsuits	Approval from Governing Body

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Language Assistance Plan
Four Factor Analysis

|	
Demography	Frequency
Importance	Resources and Cost

LAP

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Language Assistance Plan
Find Your Agency LEP DATA

- Identify your service area. This may be your county, city, a or a variety of counties and towns. The census data you pull must match your actual service area to the best of your ability.
- Follow the link: https://data.census.gov/cedsci/
- In th e search bar, type: C16001 This brings up the correct report, but for the whole country.
- Narrow the search to your service area by clicking the Filters button at the top left corner.
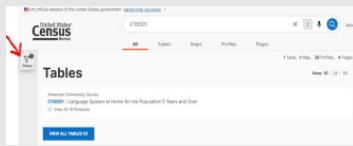
Other Potential Requirements

If you provide Fixed Route Services, you must include:

- Fixed Route Service Standards
- Fixed Route Service Policies

If you plan to construct new facilities, you may be required to conduct an Equity Analysis.

Governing Body Resolution or Approval

- Your agency approves its own plan (not ODOT or FTA)
- Board of Directors Resolution
- Meeting Minutes

Resources:
Civil Rights Website: Oregon Department of Transportation : Intermodal Civil Rights : Civil Rights : State of Oregon
Title VI Handbook (revised 2/2025): Title VI Handbook

Procurement

Steps of Procurements

- Identifying the need
- Developing detailed specifications
- Conducting market research
- Soliciting proposals
- Evaluating bids
- Negotiating contract terms
- Awarding the contract
- Managing the contract throughout its lifecycle

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Procurement Processes Comparison

Aspect	RFQ (Request for Quotation)	RFI (Request for Information)	RFP (Request for Proposal)
Purpose	Obtain pricing and terms for specific items	Gather general information about capabilities	Solicit detailed proposals for a specific project
Scope	Narrow, focused on price and terms	Broad, exploratory	Detailed, solution-oriented
When Used	Requirements are clear and specific	Early stage to explore options	Project is defined but needs detailed solutions
Content	Product/service details, quantity, terms	Questions about capabilities, experience	Project requirements, evaluation criteria
Response Detail	Pricing, delivery terms, conditions	Informative responses about offerings	Technical approach, pricing, timelines, qualifications
Evaluation Criteria	Price and terms	Quality and relevance of information	Technical solution, pricing, experience
Complexity	Low to moderate	Low	High
Time to Evaluate	Short	Short to moderate	Long
Typical Respondents	Suppliers or vendors	Suppliers, vendors, industry experts	Suppliers, vendors, service providers
Outcome	Select supplier based on price and terms	Shortlist potential suppliers/solutions	Select best proposal based on multiple criteria
Examples	Pricing on office supplies, equipment	Information on new technologies, market capabilities	Proposals for software systems, construction projects
Follow-up Actions	Issue purchase order/contract	Issue RFP or RFQ	Contract negotiations, final selection

Procurement Best Practices

- FTA's "Best Practices Procurement – Lessons Learned Manual" better known as the (BPPM) provides suggested procedures, methods, and examples to advise a recipient on conducting its third-party procurements in compliance with Federal laws and regulations and FTA Circular 4220.1G guidance.

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Procurement Folder

- Procurement Folder should read like a story – All elements from start to finish should be included in the procurement folder.
- If someone were to come to review, could they tell-
  - How you determined your bid method,
  - Who put in for bids,
  - How you chose the vendor,
  - What the contract ended up listing as the elements from the purchase order.

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Procurement items to know

Did you have the following
- Full and open competition
- No geographic preferences
- No brand name dropping
- Awards to responsible contractors
- Know your thresholds for full procurement
- No splitting contract to avoid thresholds
- No debarment – go to SAM.gov
- Signed certification
- A determine if all costs are fair and reasonable

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Vehicle, Equipment, Facility Purchase or Construction

IMPORTANT LINKS FOR CAPITAL PURCHASES

- OREGON DEPARTMENT OF TRANSPORTATION : BUYING AND MANAGING VEHICLES AND ASSETS : PUBLIC TRANSPORTATION : STATE OF OREGON
- ODOT Public Transit Division (oregon.gov)

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Survey #6 – Do you know where to find NEPA information on the PTD website?

A. Yes
B. No
C. What is NEPA?

NEPA Website

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Coordinated Plans

What are Coordinated Plans?

- Locally developed, coordinated public transit-human services transportation plan ("coordinated plan") which identifies the transportation needs of:
  - individuals with disabilities,
  - older adults,
  - people with low incomes,
- Provides strategies for meeting those local needs and prioritizes transportation services for funding and implementation.

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What is the purpose of a Coordinated Plan?

- The Federal Transit Administration (FTA) and the Oregon Department of Transportation have expectations and requirements for a coordinated planning process.

Requirements

- Transit projects shall be derived from a coordinated plan that minimally includes the following elements at a level consistent with available resources and the complexity of the local institutional environment (updated every 5 years):
  - (1) An assessment of available current transportation providers.
  - (2) An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes.
  - (3) Strategies, activities, and/or projects to address the identified gaps.
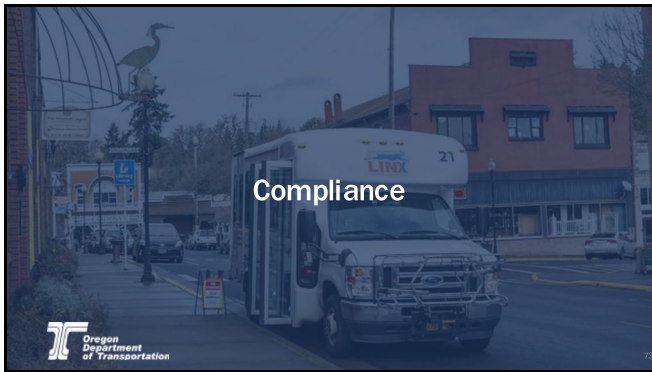 - (4) Priorities for implementation based on resources.

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Compliance

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Who, What and When of Compliance

- PTD works with a contractor to conduct reviews
- Reviews approximately every three years
- All findings must be completed as noted in final report
- Typical timelines are 30, 60, 90 or 120 days after final report is received
- RTC and Compliance Coordinator will follow up if issues are not resolved
- Funding could be delayed if findings are not closed
- Single Audit findings must show timeline for resolution and documentation of resolution

Compliance Requirements

- On time quarterly reporting
- Yearly budgets submitted within 30 days of board approval
- Yearly Audits for agencies with $1M or more in federal funding- submitted 30 days after completion
- Yearly Agreed Upon Audit Procedures – submitted within 30 days of completion
- Drug and Alcohol reporting (Feb/March)

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Training
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Survey #7 – **How many trainings per year would you like to see?**

A. 1-3 virtual
B. 1-2 in person
C. 3-5 with a mix in person and virtual
D. Only training at the conference
E. As many as you can offer
F. None

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Upcoming Trainings

• NEPA Training – Spring 2025 (virtual)

• STIF Report Training – Spring 2025 (virtual)

• Procurement Training – May 14, 2025 (virtual)

• Financial Management – July 9, 2025 (virtual)

• Drug and Alcohol Training – July 29 - 30, 2025 (in-person Bend, OR)

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Scholarships

Tap Scholarship forms

Tap Scholarship form Guidance

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Training Resources

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PTD Training Website

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Questions

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