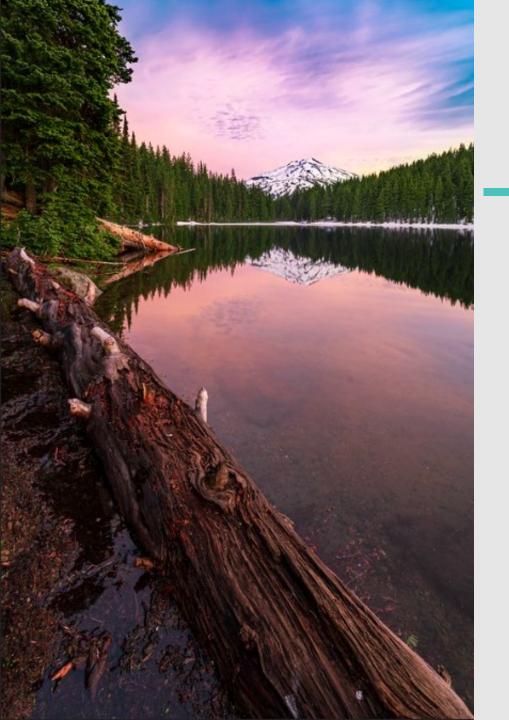


Agenda

- Overview of STIF Plan Report, STIF Metrics, and STIF data Improvement Project
- SPR Data Collection in OPTIS
- Outcome Measured Defined and Methodology for Accurate Reporting
- Technical Assistance Workshop and Survey
- Wrap-up





What is the STIF Plan Report (SPR)?

- The SPR's purpose:
 - Track Statewide Transportation Improvement Fund (STIF) Formula expenditures
 - Track STIF Outcomes
- Oregon Legislature requires reporting on 8 STIF Metrics

SPR vs APR



SPR vs APR

STIF Periodic Reports:

STIF Formula project results for:

- Miles, Hours, Rides;
- Rides to students in grades 9–12;
- Access metrics for students in grades 9-12;
- Community outcome metrics;
- STIF Funded vehicles delivered; and
- Expenditures against the Eight Statutory Program Criteria

Agency Periodic Reports: Outcomes from ALL funded services:

- Service Data
 - Miles and Hours by Mode; Rides by passenger type
- Budget Data
 - Revenue and Expenses; Volunteer & Non-Cash Resources
- Asset Data
 - Vehicle mileage & Condition; Vehicles out of Service; Equipment and Facility Condition
- Grant Data
 - Expenditures/Progress
- Accidents/Incidents
 - Accidents, Civil Rights, Optional Narratives

The 8 STIF Metrics from Legislature

- 1. Increased frequency of bus service schedules in communities with a high percentage of low-income households.
- 2. Procurement of buses that are powered by natural gas or electricity for use in areas with a population of 200,000 or more.
- 3. Implementation of programs to reduce fares for public transportation in communities with a high percentage of low-income households.
- 4. Expansion of bus routes and bus services to reach communities with a high percentage of low-income households.

The 8 STIF Metrics from Legislature

- 5. Improvement in the frequency and reliability of service connections 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 services for students in grades 9 through 12.
- 8. Services for older adults and people with disabilities.

But what do these all **MEAN?**

The 8 STIF Metrics from Legislature

Good question! We're working on defining these metrics in greater detail and will share our working drafts with you soon.

Here's one example:

<u>Metric</u>: Coordination between public transportation service providers to reduce fragmentation in the provision of transportation services

<u>Draft Definition</u>: Number of routes, passes, and/or fare structures that have been updated as the result of coordination and communication with another transit service provider, and number of stops that become serviced by two or more providers, since the beginning of the Biennium or start of current STIF plan.



STIF Outcome Reporting Challenges

- There appears to be confusion about the differences between SPR and APR
- The SPR currently does not do a great job at tracking the OUTCOMES of STIF investments
- The quarterly SPR is arduous and frustrating for providers
- Inconsistent and incorrect data reporting

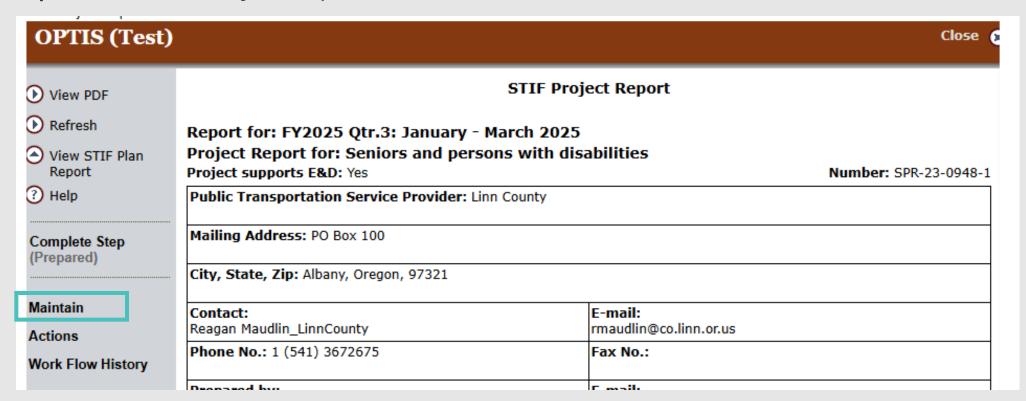


STIF Outcome Reporting Solutions

- The STIF Data Improvement Project
 - Phase 1:
 - Improve SPR data through consistent data reporting
 - Identify methodology
 - Assess technical assistance needs for providers
 - Define questions in OPTIS
 - Phase 2:
 - Remove unnecessary questions in OPTIS
 - Change OPTIS questions for reporting to focus on outcomes and 8 STIF Metrics

How do you find this in OPTIS?

Step 1: From STIF Project Report, click 'Maintain'.



Step 2: Click 'Program Criteria' and a new dialogue box will open.

▶Maintain

- Number
- · Project Information
- Provider Contact
- Provider Address
- PTSP Cash Flow
- Record Expenditures
- Project Status
- Program Criteria
- Optional Project Narrative
- Attachments

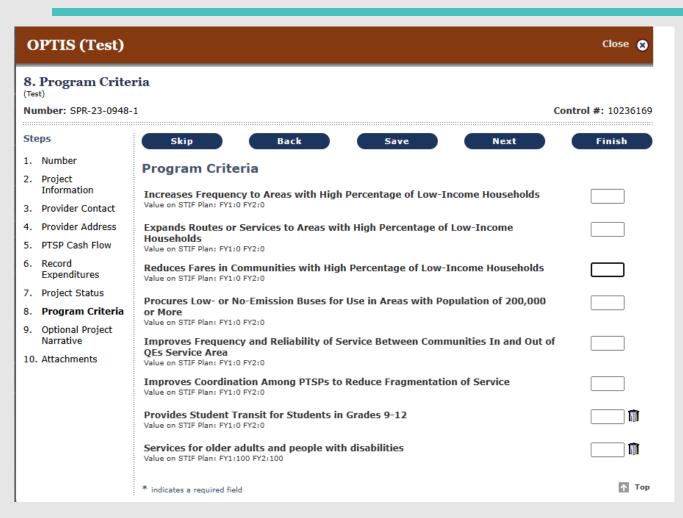
Actions

Work Flow History

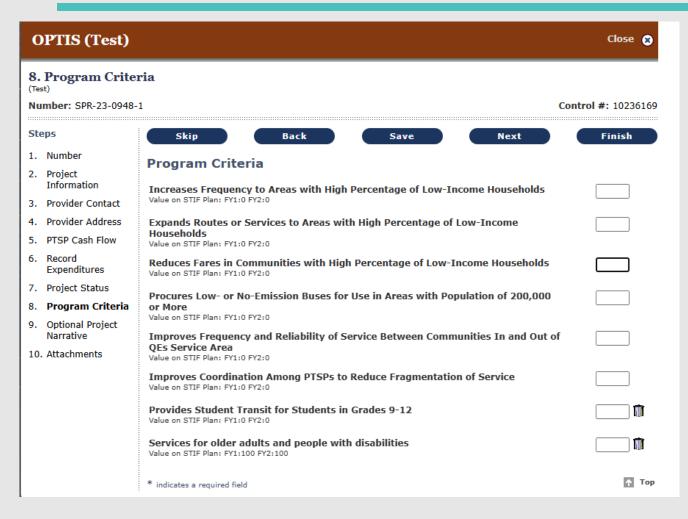
	E-mail: rmaudlin@co.linn.or.us
	Fax No.:
Prepared by:	E-mail:
Phone No.:	Fax No.:

Provider I have certified that this document is correct to the best of my knowledge and that I am the authorized representative shown below. Authorized by: Date:

[Click here to enter Attachments]



- Based on the 8 STIF Metrics.
- Report percentage of all STIF funds that were spent on each criteria during the quarter for the project.
- Does not need to add up to %100.



Example:

- If \$30,000 of STIF funds were spent for a project that quarter;
- \$15,000 spent toward Services for older adults and people with disabilities;
- \$15,000 on operations;
- What should be entered in the fillable boxes?

OPTIS (Test)

Close 😭



8. Program Criteria

(Test)

Number: SPR-23-0948-1 Control #: 10236169

Save

Steps

- Number
- 2. Project Information
- Provider Contact
- 4. Provider Address
- PTSP Cash Flow
- Record Expenditures
- 7. Project Status
- 8. Program Criteria
- Optional Project Narrative
- 10. Attachments

Program Criteria

Skip

Increases Frequency to Areas with High Percentage of Low-Income Households Value on STIF Plan: FY1:0 FY2:0

Expands Routes or Services to Areas with High Percentage of Low-Income Households

Back

Value on STIF Plan: FY1:0 FY2:0

Reduces Fares in Communities with High Percentage of Low-Income Households Value on STIF Plan: FY1:0 FY2:0

Procures Low- or No-Emission Buses for Use in Areas with Population of 200,000 or More

Value on STIF Plan: FY1:0 FY2:0

Improves Frequency and Reliability of Service Between Communities In and Out of **QEs Service Area**

Value on STIF Plan: FY1:0 FY2:0

Improves Coordination Among PTSPs to Reduce Fragmentation of Service Value on STIF Plan: FY1:0 FY2:0

Provides Student Transit for Students in Grades 9-12

Value on STIF Plan: FY1:0 FY2:0

Services for older adults and people with disabilities

Value on STIF Plan: FY1:100 FY2:100

* indicates a required field

Next























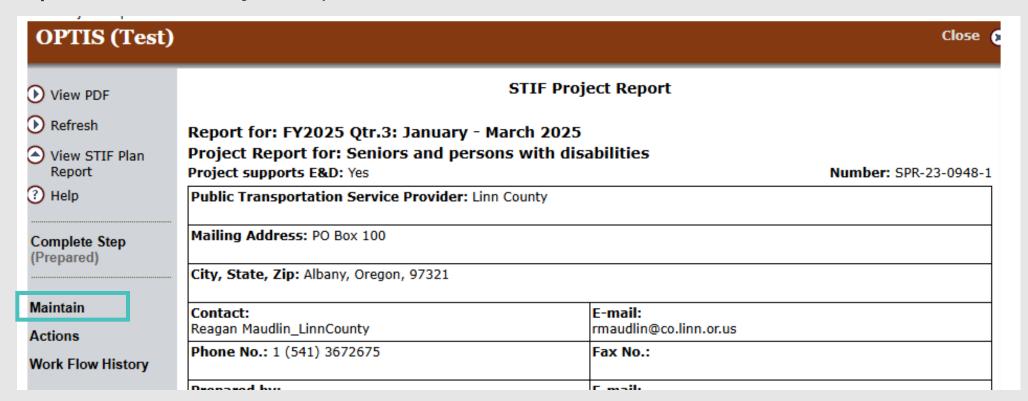




Outcome Measures – Task Level

How do you find this in OPTIS?

Step 1: From STIF Project Report, click 'Maintain'.



Outcome Measures – Task Level

Step 2: Click 'Record Expenditures' and a new dialogue box will open.

▶Maintain

- Number
- · Project Information
- Provider Contact
- · Provider Address
- PTSP Cash Flow
- Record Expenditures
- Project Status
- Program Criteria
- Optional Project Narrative
- Attachments

Actions

Work Flow History

Contact: Reagan Maudlin_LinnCounty	E-mail: rmaudlin@co.linn.or.us
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Prepared by:	E-mail:
Phone No.:	Fax No.:

Provider

Date:

I have certified that this document is correct to the best of my knowledge and that I am the authorized

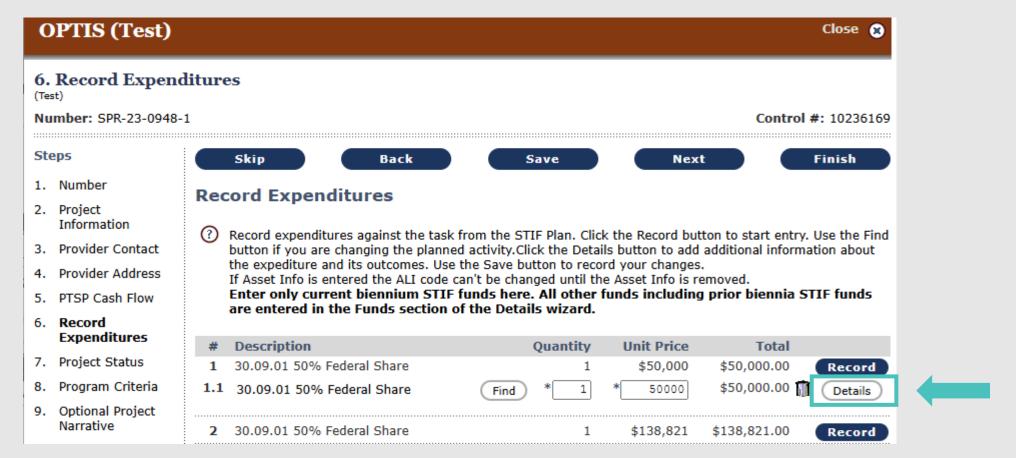
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representative shown below.

Authorized by:

Outcome Measures – Task Level

Step 3: Click 'Details' in the new dialogue box. (This will create another new dialogue box to open!)



OPTIS (Test) Close 😭

3. Outcome Measures

Item: 1.1

Number: SPR-23-0948-1 Control #: 10236210 Steps Skip Finish Back Save Next 1. Item Information **Outcome Measures** 2. Funding 3. Outcome Operations - Operating Measures Revenue Miles Asset Info Value on STIF Plan: 210,000 Revenue Hours Value on STIF Plan: 14,000 Rides Value on STIF Plan: 36,160 Number of New Stops Shared with **Other Providers** Value on STIF Plan: 0 Number of People within a Half Mile of Transit Stop (Annual) Value on STIF Plan: 0 Number of Low-Income Households within a Half Mile of Transit Stop (Annual) Value on STIF Plan: 0 Is this project supporting student Yes O No transportation? **Operations - Student Transportation** Number of Students in Grades 9-12 Served by Demand Response Number of Students in Grades 9-12 with Free or Reduced Fares Number of Students in Grades 9-12 Attending a School Served by Transit (Annual) Number of Rides to Students in Grades 9-12 (Annual) Other Other Measure (Predefined) Paratransit Rides Provided

Value on STIF Plan: 36,160

Value on STIF Plan: 1

Other Measure (Fill-in)

Outcome Measures

'Operations - Operating'

- Revenue Miles
- Revenue Hours
- Rides

Older adults and people with disabilities:

Portion of the funding used as Match to

- Number of New Stops Shared with **Providers**
- Number of People within a Half Mile of Transit Stop (Annual)
- Number of Low-Income Households within a Half Mile of Transit Stop (Annual)
- Is this project supporting Student **Transportation?**

OPTIS (Test)

Close 😭

Control #: 10236210

3.	Ou	tcome	Mea	asur	es

(Test) Item: 1.1

Number: SPR-23-0948-1

Steps

- 1. Item Information
- 2. Funding
- 3. Outcome Measures
- Asset Info

Skip Back	Save	Next	Finis
Outcome Measures			
Operations - Operating			
Revenue Miles Value on STIF Plan: 210,000			
Revenue Hours Value on STIF Plan: 14,000			
Rides Value on STIF Plan: 36,160			
Number of New Stops Shared with Other Providers Value on STIF Plan: 0			
Number of People within a Half Mile of Transit Stop (Annual) Value on STIF Plan: 0			
Number of Low-Income Households within a Half Mile of Transit Stop (Annual) Value on STIF Plan: 0			
Is this project supporting student transportation?			
Operations - Student Transportation			
Number of Students in Grades 9-12 Served by Demand Response			
Number of Students in Grades 9-12 with Free or Reduced Fares			
Number of Students in Grades 9-12 Attending a School Served by Transit (Annual)			
Number of Rides to Students in Grades 9-12 (Annual)			
Other			
Other Measure (Predefined) Value on STIF Plan: 36,160		Paratransit Rides Provide	d
Other Measure (Fill-in) Value on STIF Plan: 1		Older adults and people v	

Outcome Measures

'Operations - Student Transportation'

- Number of Students in Grades 9-12 Served by Demand Response
- Number of Students in Grades 9-12 with Free or Reduced Fares
- Number of Students in Grades 9-12 Attending a School Served by Transit (Annual)
- Number of Rides to Students in Grades 9-12 (Annual)

OPTIS (Test)

3.	Ou	tcom	e M	leas	ures

Item: 1.1

Number: SPR-23-0948-

Number: 5PK-23-0946-1	

Steps

- 1. Item Information
- 2. Funding
- 3. Outcome Measures
- Asset Info

Skip Back	Save Next Finish
Outcome Measures	
Operations - Operating	
Revenue Miles Value on STIF Plan: 210,000	
Revenue Hours Value on STIF Plan: 14,000	
Rides Value on STIF Plan: 36,160	
Number of New Stops Shared with Other Providers Value on STIF Plan: 0	
Number of People within a Half Mile of Transit Stop (Annual) Value on STIF Plan: 0	
Number of Low-Income Households within a Half Mile of Transit Stop (Annual) Value on STIF Plan: 0	
Is this project supporting student transportation?	
Operations - Student Transportation	
Number of Students in Grades 9-12 Served by Demand Response	
Number of Students in Grades 9-12 with Free or Reduced Fares	
Number of Students in Grades 9-12 Attending a School Served by Transit (Annual)	
Number of Rides to Students in Grades 9-12 (Annual)	
Other	
Other Measure (Predefined) Value on STIF Plan: 36,160	Paratransit Rides Provided
Other Measure (Fill-in)	Older adults and people with disabilities:

Outcome Measures

'Other'

Control #: 10236210

- Outcome measures intended to track individual STIF project progress
- populated based on the outcome measures specified
- 2025-2027 STIF Plan was updated to standardize the data collected in this section.

Revenue Miles:

The total number of miles traveled by vehicles operated by STIF funds for each STIF Project during the quarter.

- Notes:
 - For *Demand Response*, the number of miles a vehicle travelled to provide service to customers begins at the origin of the first passenger's trip and includes all miles travelled until vehicle arrives at final passenger destination, with two exceptions:
 - 1. Vehicle returns to garage
 - 2. Scheduled breaks in service (operator lunch, scheduled refueling stops, etc.)

Revenue Hours:

The total number of hours a vehicle is operating for vehicles operated by STIF funds for each STIF project during the quarter.

- Notes:
 - For *Demand Response*, the number of hours spent providing service to customers begins when first passenger boards vehicle and ends when last passenger alights vehicle, with two exceptions:
 - 1. Vehicle returns to garage
 - 2. Scheduled breaks in service (operator lunch, scheduled refueling stops, etc.)

Rides:

The number of boardings on vehicles operated using funds from the relevant STIF Project during the quarter.

- For Fixed Route, transit agencies must count passengers each time they board vehicles, no matter how many vehicles they use to travel from their origin to their destination.
- For Demand Response, ridership figures must include personal care attendants and companions whether they pay a fare or not.
- For Vanpool, the driver should be included in the ridership counts unless they are specifically employed as a driver.
- Employees or contractors on transit agency business are not passengers

Number of Stops Shared with Providers (Annual):

The number of stops where new service is established using STIF funds that are serviced by two or more providers.

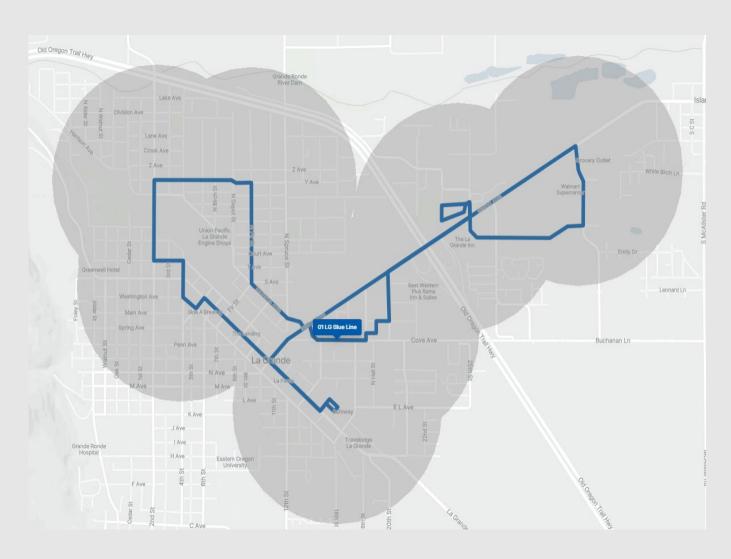
- Only one provider needs to be operating service at the stop location utilizing STIF funds for stop to be reported in the SPR Report.
- Each new shared stop may only be reported by one Qualified Entity. If providers covered by more than one STIF plan are utilizing STIF funds to service stop location, the Qualified Entities must coordinate with agencies to determine which entity will report the new share stop on their SPR.

Number of People Within a ½ Mile of a Transit Stop (Annual):

An unduplicated total of the population within a half mile of a transit stop, based on data provided or derived from population data published by the U.S. Census Bureau.

- The population within a $\frac{1}{2}$ mile of a given transit stop or transit center should only be reported once, regardless of how many transit agencies provide service to that stop or transit center.
- Overlap in service areas among two or more transit agencies should be noted and addressed by the Qualified Entity to avoid duplication of population figures.

Number of People Within a ½ Mile of a Transit Stop



Stops: 8

Radius: ½ mile of stops

Measured by: Group of stops (unduplicated pop count)

Total Pop in Radius: 10,200

Stops: 8

Radius: 1/2 mile of stops

Measured by: Individual stops (duplicated pop count)

Total Pop in Radius: 18,613

Number of Low-Income Households Within ½ Mile of a Transit Stop (Annual):

Number of households (not people) with a total income at or below 200% of US Census Bureau poverty threshold for the relevant year.

- This is similar to, but not the same measure, as communities with a high percentage of lower income households.
- Federal poverty thresholds by household size can be found here: https://www.census.gov/data/tables/time-series/demo/income-poverty/historical-poverty-thresholds.html.
- Overlap in service areas among two or more transit agencies should be noted and addressed by the Qualified Entity to avoid duplication of population figures.



- <u>Is This Project Supporting Student</u> <u>Transportation? (Y/N)</u>
- Answer yes if a project supports transportation that can feasibly and efficiently be used by students in grades 9 through 12 (OAR 732-040-005(37)).

Number of Students in Grades 9-12 Attending a School Served by Transit:

The total number of students in grades 9-12 attending schools within the transit service area that have a transit stop within a half mile that operates at times during the scholastic schedule when students arrive and depart from school.

- This value should only be entered in the fourth and eighth quarter of the STIF Plan period. The value of '0' should be entered for the remaining quarters of the STIF Plan period.
- Value should only be entered for one STIF Project in STIF Plan per quarter to prevent double counting of the data.

Number of Students in Grades 9-12 Served by Demand Response:

Number of students in grades 9-12 that have access to a Demand Response service that operates at times during the scholastic schedule when students arrive and depart from school.

- This value should only be entered in the fourth and eighth quarter of the STIF Plan period. The value of '0' should be entered for the remaining quarters of the STIF Plan period.
- Value should only be entered for one STIF Project in STIF Plan per quarter to prevent double counting of the data.

Number of Students in Grades 9-12 with Free or Reduced Fares:

The total number of students in grades 9-12 eligible to participate in the STIF Formula Plan's free or reduced fare programs

- Providers with general free or reduced fare programs that include students in grades 9-12 should report ALL such students enrolled at served schools;
- Providers with fare programs specifically for students should report ALL such students in grades 9-12 enrolled at served schools;
- This value should only be entered in the fourth and eighth quarter of the STIF Plan period. The
 value of '0' should be entered for the remaining quarters of the STIF Plan period;
- Value should only be entered for one STIF Project in STIF Plan per quarter to prevent double counting of the data.

Number of Rides to Students in Grades 9-12

The total number of rides provided to students in grades 9-12 using STIF Formula Plan funded services during the quarter

- See Rides on slide 23
- This value should only be entered in the fourth and eighth quarter of the STIF Plan period. The value of '0' should be entered for the remaining quarters of the STIF Plan period;

Other Outcome Measures Defined

Questions Generated Based on Individual STIF Plans

Each task identified in your STIF Plan will have corresponding Outcome Measure questions

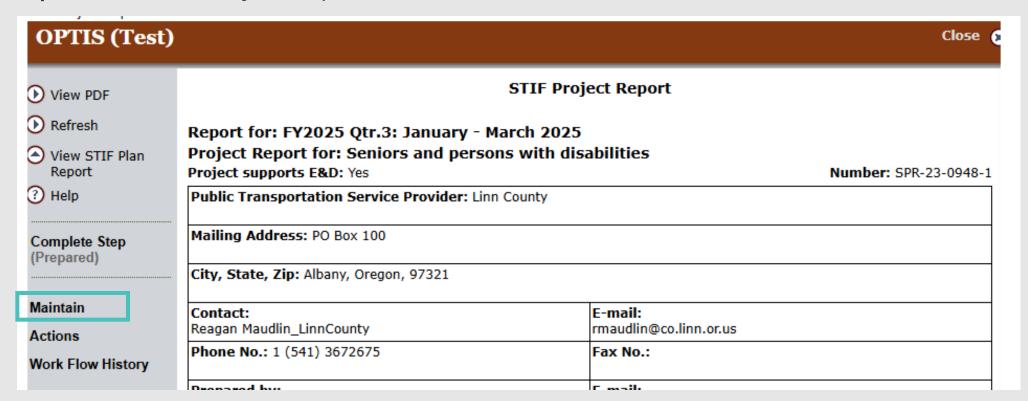
Notes:

See the SPR Training Guidance for more information

Project Status- Task Level

How do you find this in OPTIS?

Step 1: From STIF Project Report, click 'Maintain'.



Project Status- Task Level

Step 2: Click 'Project Status' and a new dialogue box will open.

▶Maintain

- Number
- · Project Information
- Provider Contact
- Provider Address
- . PTSP Cash Flow
- Record Expenditures
- Project Status
- Program Criteria
- Optional Project Narrative
- Attachments

Actions

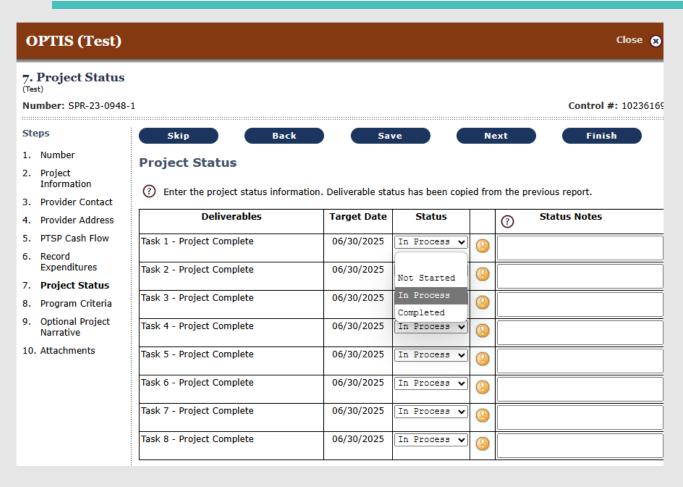
Work Flow History

	E-mail: rmaudlin@co.linn.or.us
Phone No.: 1 (541) 3672675	Fax No.:
Prepared by:	E-mail:
Phone No.:	Fax No.:

Provider I have certified that this document is correct to the best of my knowledge and that I am the authorized representative shown below.		
Authorized by:	Date:	

[Click here to enter Attachments]

Project Status - Task Level



- Project status definitions have been updated to add clarity
- Projects will be divided into:
 - Capital Projects Construction, Renovation, or Land Acquisition
 - Capital Projects Asset Only
 - Non-Capital Projects

Capital Projects – Construction, Renovation, and Land Acquisition

Includes construction projects, facility renovation projects, land acquisition projects, and any other capital projects that acquire or modify fixed property or structures.

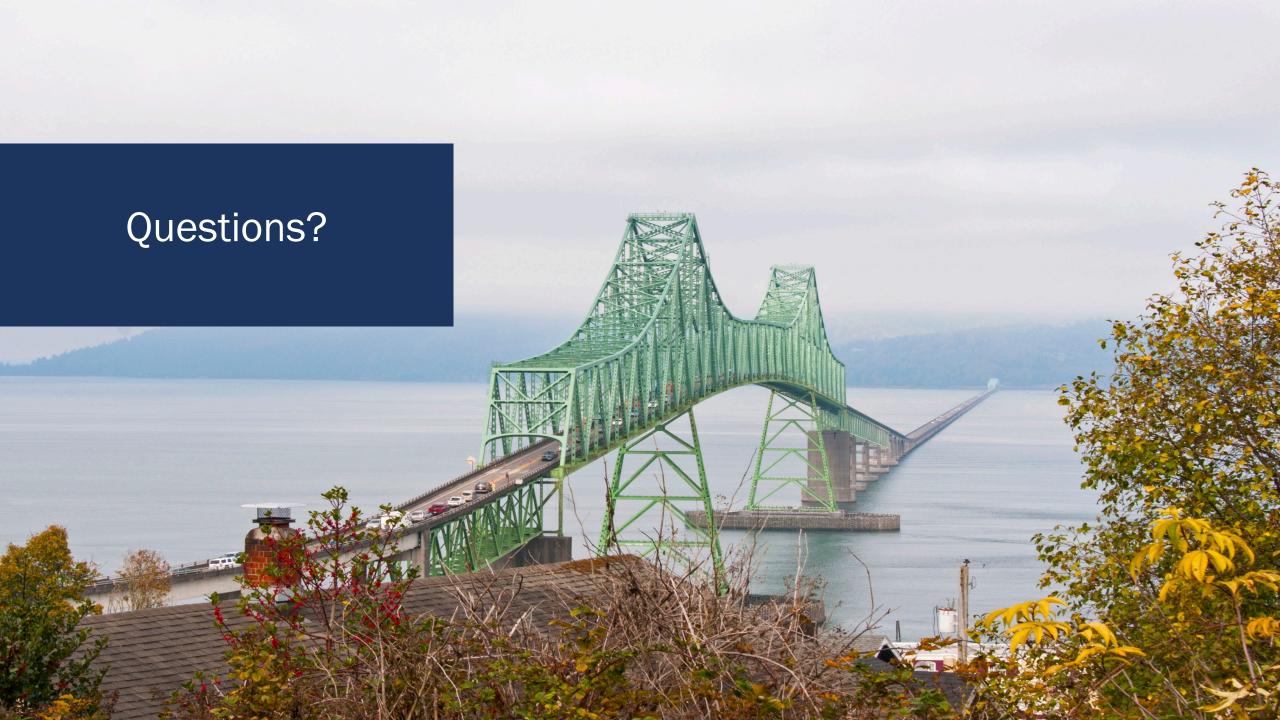
Not Started	No expenditures have occurred on the project during the current STIF Plan period
Planning/Design/Permitting	Expenditures have occurred for project consultation or planning, preliminary, advanced, or final construction design, drafting of construction plans, permit acquisition, geological, environmental or archaeological field work, or any other preconstruction phases, up to contract administration for construction
Property in Acquisition	Working to identify property for purchase, or property has been identified for purchase
In Contract for Construction	Construction contract has been procured and Notice to Proceed has been issued for construction of the project
Completed	No further expenditures or reimbursements for project
Delayed/Suspended	Project has started and expenditures have occurred in STIF plan period, but project has been suspended or delayed resulting from an unexpected interruption or pause.
Cancelled	Project has been cancelled or has been delayed/suspended and remains in that status at the end of the STIF Plan period.

Capital Projects - Asset Only

Includes projects that are asset purchases only.		
Not Started	No expenditures have occurred on the project during the current STIF Plan period	
In Procurement	Procurement process has started, but purchase order has not been issued	
Purchase Order Issued	Purchase Order for asset(s) has been issued	
Asset Acquired	When the vehicle or asset is in possession of the transit agency	
Completed	When <u>vehicle or asset</u> has been put into service, and no further expenditures or reimbursements are anticipated for the current STIF Plan period	
Delayed/Suspended	Project has started and expenditures have occurred in STIF plan period, but project has been suspended or delayed resulting from an unexpected interruption or pause, not due to a manufacturer delay	
Manufacturer Delay	Asset acquisition has been delayed <u>due to manufacturer</u> delays in providing the asset or vehicle	
Cancelled	Project has been cancelled or has been delayed/suspended and remains in that status at the end of the STIF Plan period.	

Non-Capital Projects

Includes operations projects, and projects with only material assets in which cost is less than \$10,000.		
Not Started	No expenditures have occurred on the project during the current STIF Plan period	
Started	Expenditures have been submitted for reimbursement, or contract for services has been executed	
Completed	No further expenditures during this STIF Plan period	
Delayed/Suspended	Project has started and expenditures have occurred in STIF plan period, but project has been suspended or delayed resulting from an unexpected interruption or need to pause	
Cancelled	Project has been cancelled or has been delayed/suspended and remains in that status at the end of the STIF Plan period	





https://www.cognitoforms.com/ODOT2/SPRPainPointInquiry

