



**Oregon Special Transportation Fund (STF)
Guidance and Grant Application Instructions
FY 2021-23**

Oregon Department of Transportation Public Transportation Division

For a version of this document with increased font size or in other formats, contact the Public Transportation Division, 555 13th Street NE, Salem OR 97301. Office (503) 986-3300 or fax (503) 986-4189

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Staff Contacts

Questions about the Special Transportation Fund Formula solicitation should be directed to your regional transit coordinator or to Marsha Hoskins, Public Transportation Policy and Implementation Manager, at Marsha.A.Hoskins@odot.state.or.us or by telephone at 503-986-3266.

An electronic version of this document is located in the Special Transportation Fund section of the Public Transportation Funding Opportunities Page located here:

<https://www.oregon.gov/ODOT/RPTD/Pages/Funding-Opportunities.aspx>.

PART 1: SPECIAL TRANSPORTATION FUND OVERVIEW AND GUIDANCE

Introduction

This document provides program guidance and application instructions for the Oregon Department of Transportation (ODOT) Public Transportation Division (PTD) Special Transportation Fund (STF) Program solicitation. This will be the final solicitation for this program. [Senate Bill 1601](#), passed in the July 2020 First Special Session of the Oregon State Legislature, directed the consolidation of the STF with the Statewide Transportation Improvement Fund (STIF) program, by July 1, 2023.

The STF was created in 1985 by the Oregon Legislature and was originally funded with a \$.01 per pack cigarette tax. In 1989, this tax was raised to \$.02. Today, STF is funded by cigarette tax revenue, as well as excess revenue earned from sales of photo ID cards and other funds from ODOT or as directed by the Legislature. Originally, the law identified 33 transit districts or counties as eligible to receive STF funds; subsequently, in 2003, the nine federally-recognized Oregon Indian Tribes in Oregon were added as eligible recipients. The resulting 42 designated entities are called “STF Agencies.” The Legislature intended that STF funds be used to provide transportation services needed to access health, education, work, social, and recreational opportunities so that seniors and people with disabilities may live as independently and productively as possible.

The STF has enabled public transportation across the state, providing a flexible and stable source of funding, particularly for rural and frontier counties, and for the federally-recognized Tribes. We would be remiss not to recognize the enormous impact from this fund, which allowed special transportation to grow into public transportation across Oregon.

After subtracting administration costs, the STF is divided into two accounts.

- Seventy-five percent is allocated to the Formula Account for distribution to designated STF Agencies.
- Up to twenty-five percent is allocated to a Discretionary Account, after formula requirements are addressed.

This solicitation is for the formula program only. Projected 2021-23 forecasts for STF revenues (see Funding Availability table on Page 10) do not allow enough fund availability to offer a discretionary solicitation this biennium. Approximately \$5.5 million in 21-23 STF Discretionary funding will be added to STF Formula funds, moving the 2021-23 STF Formula funding level closer to 2019-21 levels. The 2021-23 Agency Requested Budget for PTD assumes the remaining funding needed to bring STF Formula up to 19-21 levels will be accomplished by a transfer of funds from STIF, pending approval of the 21-23 budget by the Legislative Assembly.

Each STF Agency receives a percentage of the STF Formula Account based on the population of the area compared to the total state population. The Oregon Transportation Commission establishes a minimum allocation, which is currently \$67,000 per year. Each STF Agency gets either the population-based allocation or the minimum allocation, whichever is more. The STF Formula Program is not a grant program. Access to the formula funds is an entitlement for the 42 designated entities. Each STF Agency is responsible for developing its own program policies and procedures as required to implement the law, and to meet its needs. STF Agencies that are districts are required to allocate a proportionate share of funds to their out-of-district area.

STF Agencies are responsible for complying with all of the requirements defined by Oregon Revised Statutes ([ORS](#)) [391.800 through 391.830](#). The STF Agency may delegate some of the requirements, but must ensure compliance for the delegated requirements.

Each STF Agency has significant latitude to develop program policies and procedures to meet the requirements. The STF Agency may impose stricter standards than those defined by law. The STF law broadly identifies the type of providers and activities that are eligible for the funds, but the STF Agency may decide to limit eligibility to certain providers or certain types of projects.

Several key factors are necessary, and must be maintained for eligibility for STF funds.

Minimum requirements:

1. The STF Agency has appointed an advisory committee.
 - a. District and county committees have at least five members and
 - b. Tribal committees have at least three members;
2. The advisory committee meets at least twice per year and as many times as necessary to fulfill the duties of the program;
3. The governing body of the STF Agency receives the advice of the advisory committee regarding distribution of funds;
4. The STF Agency manages the program and funds as prescribed by ORS and Oregon Administrative Rules (OAR);
5. The STF Agency has adopted a Coordinated Public Transit-Human Services Transportation Plan (known in Oregon as a Coordinated Plan);
6. A project eligible for funding exists, and the recipient of the STF is also eligible as prescribed by OAR;
7. An application is submitted to PTD that describes the plan for STF; and
8. All reports are submitted as required.

STF formula funds do not require any local match, and may be used for any purpose directly related to transportation services, including, but not limited to, transit operations, capital equipment, planning, travel training and other transit-related purposes.

STF Program requirements and parameters are guided by:

- [ORS 391.800 through 391.830](#) and
- [OAR Chapter 732.](#)

Definitions

- **Coordinated Public Transit-Human Services Transportation Plan** - A locally developed, coordinated public transit-human services transportation plan (“Coordinated Plan”) that identifies the transportation needs of individuals with disabilities, seniors, and people with low incomes; provides strategies for meeting those local needs; and prioritizes transportation services and projects for funding and implementation. These plans may be developed on a local, regional, or statewide level. PTD has designated each STF Agency as the lead agency to develop and adopt the Coordinated Plan for its area, and these agencies are responsible to ensure that plans are completed. The planning area will be (at a minimum) the county or counties governed by the Lead/STF Agencies, and the areas served by Indian tribal governments.

Required Elements: Projects selected for funding shall be included in a Coordinated Plan that minimally includes the following elements at a level consistent with available resources and the complexity of the local institutional environment:

- Stakeholder involvement description and documentation;
- An assessment of available services that identifies current transportation providers (public, private, and nonprofit);
- An assessment of transportation needs for individuals with disabilities and seniors. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts and gaps in service;
- Strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery; and Priorities for implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities identified.
- **District:** A mass transit district organized under [ORS 267.010 to 267.390](#) or a transportation district organized under [ORS 267.510 to 267.650](#).
- **Public Transportation Services** - Any form of passenger transportation by car, bus, or other conveyance, either publicly or privately owned, which provides service to the general public (not including charter, sightseeing, or exclusive school bus service) on a regular and continuing basis. Such transportation may be for purposes such as health care, shopping, education, employment, public services, personal business, or recreation.
- **STF Advisory Committee** – Group with a minimum of five members from counties and transit agencies, and three members from Indian tribes that works with transit agencies to establish a fair and standardized process for selection of transit agencies and projects. This process must be:
 - conducted in writing;
 - equitable, so that all applicants and projects are evaluated consistently;

- include a public review component; and
- have a provision for receiving and reviewing protests. It is not necessary under STF regulations to conduct a competitive grant application process unless the STF Agency policy requires such process.
- **STF Agency** - One of 42 agencies defined by Oregon law ([ORS 391.800](#)), essentially consisting of transit districts; counties (if there is no transit district in a county); and the nine federally-recognized Oregon Indian tribal governments. STF Agencies are designated by law as the recipients of STF formula funds, and are responsible for developing program policies and procedures as required to implement the law, and to meet its needs. STF law also directs STF Agencies to receive and disburse funds from a “separate governmental account”.

Grant Solicitation and the Oregon Public Transportation Plan

The [Oregon Public Transportation Plan \(OPTP\)](#), adopted by the OTC in September 2018, provides overarching policy guidance for public transportation in Oregon. The OPTP contains 10 state public transportation goals; STF agencies are encouraged to consider these goals in the project selection process:

Goal 1: Mobility - Public Transportation User Experience

People of all ages, abilities, and income levels move reliably and conveniently between destinations using an affordable, well-coordinated public transportation system. People in Oregon routinely use public transportation to meet their daily needs.

Goal 2: Accessibility and Connectivity - Getting from Here to There

Riders experience user-friendly and convenient public transportation connections to and between services and travel modes in urban, suburban, rural, regional, and interstate areas.

Goal 3: Community Livability and Economic Vitality

Public transportation promotes community livability and economic vitality by efficiently and effectively moving people of all ages to and from homes, jobs, businesses, schools and colleges, and other destinations in urban, suburban, and rural areas.

Goal 4: Equity

Public transportation provides affordable, safe, efficient, and equitable transportation to jobs, services, and key destinations, improving quality of life for all Oregonians.

Goal 5: Health

Public transportation fosters improved health of Oregonians by promoting clean air, enhancing connections between people, enabling access to services such as health care and goods such as groceries, and by giving people opportunities to integrate physical activity into everyday life through walking and bicycling to and from public transportation.

Goal 6: Safety and Security

Public transportation trips are safe; riders feel safe and secure during their travel. Public transportation contributes to the resilience of Oregon communities.

Goal 7: Environmental Sustainability

Public transportation contributes to a healthy environment and climate by moving more people with efficient, low-emission vehicles, reducing greenhouse gases and other pollutants.

Goal 8: Land Use

Public transportation is a tool that supports Oregon's state and local land use goals and policies.

Agencies collaborate to ensure public transportation helps shape great Oregon communities providing efficient and effective travel options in urban, suburban, and rural areas.

Goal 9: Funding and Strategic Investment

Strategic investment in public transportation supports the overall transportation system, the economy, and Oregonians' quality of life. Sustainable and reliable funding enables public transportation services and infrastructure to meet public needs.

Goal 10: Communication, Collaboration, and Coordination

Public and private transportation providers and all levels of government within the state and across state boundaries work collaboratively and foster partnerships that make public transportation seamless regardless of jurisdiction.

Additionally, please review the [OPTP Local Practitioner's Guide for Local Jurisdictions and Providers](#) on the PTD [Technical Resource Center website](#). This guide explains the OPTP policies and strategies and includes examples and experiences from providers across the state that are successfully implementing policies reflected in the OPTP.

Program Purposes and Eligibility

Oregon's goal is for the STF Program to provide a flexible, coordinated, reliable source of revenue to support transportation services for seniors and individuals with disabilities.

Eligible Applicants

Per statute, STF formula funds are distributed to 42 STF Agencies. Upon receipt of a biennial application which specifies how these funds will be used, an STF agreement is created and executed and funds are disbursed to the STF Agencies on a quarterly basis. Eligible subrecipients for funds from an STF Agency include: cities, counties, transportation districts, public or private agencies, and Indian tribes. These agencies must:

- Fulfill advisory committee requirements per [ORS 391.800 through 391.830](#)
- Have adopted a Coordinated Plan, pursuant to [OAR 732-005-0081](#). A copy of the adopted Plan must be on file with PTD.
- Be current in the submittal of required quarterly reports. (Please consult with your RTC if you have overdue reports or are unable to bring your agency up to date with this requirement.)
- Continue to demonstrate that eligible activities and providers exist within the STF program.

Eligible Projects

STF funds may be used for the purpose of financing and improving transportation programs and services for seniors and individuals with disabilities, including transit operations, capital equipment, planning, travel training and other transit-related purposes. Eligible project activities include maintenance of existing transportation programs and services for the target population, expansion of such services, creation of new services, and planning and development of services for those not currently served. Some examples of projects are: dial-a-ride services for the general public, seniors, or individuals with disabilities; mileage reimbursement programs; marketing; capital asset purchases; coordination activities; and matching funds for federally-funded projects providing service for seniors and individuals with disabilities.

Funding Availability

For the July 1, 2021, through June 30, 2023, grant agreement period, PTD estimates funding availability for the STF Formula program as displayed in this table:

STF Agency Name	21-23	19-21	% Change
	Allocation Target	Allocation Target	
Baker County	135,400	135,400	0.0%
Basin Transit Service Transportation District	319,320	324,363	-1.6%
Benton County	440,334	442,139	-0.4%
Burns Paiute Tribe	135,400	135,400	0.0%
Columbia County	247,923	247,006	0.4%
Confederated Tribes of Coos, Lower Umpqua and Siuslaw	135,400	135,400	0.0%
Confederated Tribes of Grand Ronde Community of Oregon	135,400	135,400	0.0%
Confederated Tribes of Siletz Indians	135,400	135,400	0.0%
Confederated Tribes of the Umatilla Indian Reservation	135,400	135,400	0.0%
Confederated Tribes of Warm Springs	135,400	135,400	0.0%
Coos County Area Transportation District	296,662	303,634	-2.3%
Coquille Indian Tribe	135,400	135,400	0.0%
Cow Creek Tribe of Umpqua Indians	135,400	135,400	0.0%
Crook County	135,400	135,400	0.0%
Curry County	135,400	135,400	0.0%
Deschutes County	896,459	869,772	3.1%
Gilliam County	135,400	135,400	0.0%
Grant County Transportation District	135,400	135,400	0.0%
Harney County	135,400	135,400	0.0%
Hood River County Transportation District	135,400	135,400	0.0%
Jefferson County	135,400	135,400	0.0%
Josephine County	405,144	409,365	-1.0%
Klamath Tribes	135,400	135,400	0.0%
Lake County	135,400	135,400	0.0%
Lane Transit District	1,755,993	1,757,977	-0.1%
Lincoln County	227,161	230,985	-1.7%
Linn County	589,185	590,915	-0.3%
Malheur County	152,111	154,716	-1.7%
Morrow County	135,400	135,400	0.0%
Rogue Valley Transportation District	1,027,276	1,030,545	-0.3%
Salem Area Mass Transit District	1,995,616	1,992,724	0.1%
Sherman County	135,400	135,400	0.0%
Sunset Empire Transportation District	185,867	187,727	-1.0%
Tillamook County Transportation District	135,400	135,400	0.0%
Tri County Metropolitan Transportation District of Oregon	8,598,238	8,579,178	0.2%
Umatilla County	379,295	384,991	-1.5%
Umpqua Public Transportation District	523,060	530,193	-1.3%
Union County	135,400	135,400	0.0%
Wallowa County	135,400	135,400	0.0%
Wasco County	135,400	135,400	0.0%
Wheeler County	135,400	135,400	0.0%
Yamhill County	503,684	507,097	-0.7%
Grand Total	21,928,328	21,928,328	0%

The population numbers used in this forecast are taken from [2019 PSU projections](#) (based on 2010 census data) for the counties and self-reported information from the nine federally recognized Tribes, using Table 3 in the PSU data for general population. Changes from the preceding biennium are due to population movement.

In the submitted 2021-23 Agency Requested Budget (ARB), PTD proposed a continued transfer of STIF revenues to STF in 2021-23 to maintain STF funding consistent with 2019-21 levels. The current estimated need for a 21-23 transfer from STIF to STF is approximately \$4.4M, or approximately 2% of resources projected to be available to STIF in 2021-23, based on the October 2020 forecast. STF Agencies should be aware this proposed transfer is not final until it is reviewed during the legislative budget process in the 2021 legislative session. The assumed transfer is included in 2021-23 solicitation STF and STIF revenue projections for **planning** purposes.

Application Submission

Applications for the 2021-23 grant solicitation are due to PTD no later than **5:00 p.m. on March 1, 2021**, to ensure the first quarterly disbursement by July, 2021. Applications must be submitted by the designated STF Agency. An optional subrecipient application form is available for use by STF Agencies. PTD may ask applicants to supply missing information or to provide clarification about the meaning or intent of any portion of an application.

Project Selection Process and Schedule

The method for determining how funds are to be used is at the discretion of the STF Agency since the law does not define a local distribution procedure. The procedure used by the STF Agency should reflect the local conditions. For example: a small county with a single provider may not require a formal application and review process, whereas a larger county with many demands on the funds will need an appropriate method to assist in making decisions.

Examples of procedures used by STF Agencies include:

- A grant application process with application and eligibility criteria that are used to make decisions.
- A process of negotiation with the providers of service and the STF Advisory Committee about the best use of the funds.
- A request for proposal for service delivery.
- A directive from the STF Agency.

Transportation providers eligible to receive STF funds from STF Agencies include:

- Cities;
- Counties;
- Transportation districts;
- Public or private agencies;

- Indian Tribes;
- Individuals; or
- Any of these joined in cooperative agreements.

STF Agencies may choose to establish policies for limiting distribution to a certain kind of agency only.

To be eligible for STF, a subrecipient must:

- Be eligible to enter into agreements;
- Have the legal, managerial and operational capacity to do the work to be paid for by the STF;
- Not be debarred or suspended from federal grants;
- Maintain compliance with federal, state and local laws and regulations including, but not limited to, those pertaining to passenger transportation, civil rights, labor, insurance, safety and health, as applicable;
- Comply with the laws or rules of the STF Program;
- Properly use and account for the STF funds received; and
- Operate the project or service in a safe, prudent and timely manner.

The STF Agency may require additional eligibility qualifications.

The general process steps for STF Formula project selection are as follows:

- 1) STF agencies conduct a local public process to solicit, review and prioritize projects for STF funding (Nov 2020 – Feb 2021).
- 2) STF Agency governing bodies approve final project selection recommendations (Feb 2021).
- 3) STF Agencies submit their application for selected projects to PTD (March 1, 2021).
- 4) PTD reviews applications for completeness, applicant eligibility, and project eligibility consistent with STF requirements (Mar – Apr 2021).
- 5) PTD prepares a final, reviewed list of STF Agency projects and shares the list with the Public Transportation Advisory Committee (PTAC) (May 2021).
- 6) The PTAC receives the STF Agency project lists and forwards the lists to the OTC (May 2021).
- 7) The OTC reviews the list of projects which will be funded by STF (May 2021).
- 8) PTD posts STF funding awards on the PTD website and creates 2021-23 funding agreements for execution (May-Jun 2021).

Project Selection Criteria

In the project evaluation process, STF Agencies may consider that:

- Project design is for, or benefits, seniors and/or individuals with disabilities;
- Project design is appropriate to the purpose and type of project;
- Project is derived from the adopted Coordinated Plan;
- Service is accessible to individuals with disabilities in conformance to ADA, if applicable;
- Vehicles are appropriate for the type of service;
- Service is efficient and effective for the type of service;
- Applicant has adequate revenue to maintain services (in addition to the STF request); and
- Other local criteria, priorities and conditions

Administrative Allotment:

An annual administrative allotment of \$2,000 is available to each STF Agency. The allotment is intended to defray the STF Agency's cost of receiving, disbursing and accounting for their STF moneys. Per STF law, the STF Agency is prohibited from using moneys from the STF formula allocation to defray these specific administrative expenses. The additional costs of developing and managing the STF Program, including indirect costs charged by the STF Agency, planning, advisory committee management, contract management, and technical assistance, are not defined as administration, and may be supported by moneys from the formula allocation.

Appeals Process:

While STF Formula funds are entitlements, if concerns arise regarding STF Agency processes, PTD will follow the appeals process identified on page 34 of the State Management Plan for Public Transportation Programs, available at:

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/State-Management-Plan.pdf>.

Reporting Requirements

The primary purposes of STF reporting are to ensure that STF funds are being used for the defined purpose, to measure the effect of the program, and to provide feedback about the effects of the program to the Oregon Legislature and others.

Reports are required on a quarterly basis from each STF Agency. Reports are due to the Public Transportation Division 45 days after the end of each quarter. Guidance for Agency Periodic Reports, which include STF reporting, is located on the [PTD website](#).

PTD requires performance and fiscal reports (and vehicle reports as applicable) from subrecipients for each of its funding programs. Performance reports document the number of rides, hours, miles, senior rides, and disabled passenger rides a subrecipient provides. Fiscal reports authenticate quarterly revenues and expenditures, local contributions, sources of contribution, and other data as required by the specific funding source.

Recipients may include reporting requirements in their sub-agreements to obtain reporting and/or additional information from subrecipients, but recipients are ultimately responsible to provide all required reporting information to PTD.

PTD requests recipients submit copies of subrecipient agreements to PTD within 30 days of fully executing the subrecipient agreement.

Under the [State Group Transit Asset Management Plan](#), if applicable, recipients that have acquired, purchased, or leased capital assets shall enter asset information into the Oregon Public Transit Information System (OPTIS), which is PTD's inventory system of record.

The inventory must include the following information:

- Purchase date and price;
- Funds used for the purchase;
- Authorized use and operator;
- Asset description

Reports are considered fiscal documents, and should be signed by the individual with fiscal authority, or with delegated authority for fiscal activities.

Capital Assets

The STF Agency is required to have procedures in place to maintain “continuing control” of capital items valued over \$5,000 that were purchased in whole or part with STF. The method of control depends on the type of capital. At a minimum, the STF Agency is required to maintain an inventory of these capital items, and under the [State Group Transit Asset Management Plan](#), if applicable, recipients that have acquired, purchased, or leased capital assets shall enter asset information into OPTIS, which is PTD's inventory system of record. The STF Agency may keep an inventory of items costing less than \$5,000, outside of OPTIS.

Specific requirements for vehicles:

- Vehicles purchased or leased in whole or in part with STF funds must be registered through the Oregon Driver and Motor Vehicle Services and tied to the STF Agency or the organization receiving the equipment.
- If the vehicle is registered to an agency other than the STF Agency, the STF Agency must be listed on the vehicle title as the security interest holder.
- The STF Agency may lease vehicles to providers. The vehicles titles must document this relationship.

Continuing control may also include ensuring that the capital item is being used for the appropriate purpose, and that it is kept in good, safe condition. For example, if a senior program operates a bus paid for with STF funds, the STF Agency must be informed about the use of the vehicle: where it is parked, how often it is serviced, etc. These topics could be included in a lease or use agreement.

Additional capital requirements are specified in the [State Group Transit Asset Management Plan](#), if applicable.



PART 2: Application Information

Please read all information and instructions before completing the application.

General Information

These instructions cover the application process for the regular Special Transportation Formula Fund (STF) Program. The application describes projects for the entire 2021-2023 biennium, and must be submitted before funds can be dispersed.

PTD will only accept applications submitted by STF Agencies.

PTD has created an optional subrecipient application for STF Agencies to use in their local project solicitations. This optional tool allows subrecipients to submit project applications to lead agencies, and the same instructions, detailed below, apply to this optional subrecipient form.

The application and optional subrecipient application are located on the ODOT Public Transportation Division Funding Opportunities webpage: <https://www.oregon.gov/odot/RPTD/Pages/Funding-Opportunities.aspx>

Application Format and Use

The application form is a fillable, web-based document that requires an internet connection. Chrome, Firefox, and Edge are the recommended web browsers. You may experience formatting limitations and errors if using Internet Explorer.

The form uses a combination of check boxes, yes or no questions, text boxes, and buttons for uploading documents and adding information. If there are technical problems using the form, please call Brian Roth, Web and Forms Developer, at 503-986-3394. For answers to programmatic or process-specific questions, contact your regional transit coordinator.

You may save your progress as you work through the application by clicking the “Save” button on the last page of the application. Thus, applications may be completed over multiple sittings. You may invite collaborators to work on your application by sharing the form hyperlink, but we recommend that only one person work in the form at a time. Be sure to save the form before sharing with a colleague.

For some questions, a “yes” or “no” response expands the field where you will be asked for additional information. Required fields are marked with an asterisk; if these fields are not completed, the form will prompt you to complete the field before submitting the form.

When you are finished, select “Submit Application”. You will receive a message acknowledging PTD’s receipt of the application. A link to a PDF version of your application appears in this message and it can be opened and saved for your records.

Applications for 2021-23 STF program are due to PTD no later than **5:00 p.m. on Monday, March 1, 2021** to ensure their first quarterly disbursement by July 2021.

Application Instructions

Step-by-step instructions are listed below to provide additional clarity. Be sure to answer each question on the application. Some fields auto-calculate based on what is entered in a previous field; and some fields present additional text boxes based on your responses.

A. Applicant Information

Check “Yes” or “No” to the statement: “I am the Special Transportation Fund (STF) Agency”. If you click “No”, you will be directed to the optional STF Subrecipient Application.

STF Agency Name: Choose your agency’s name from the drop-down.

STF Agency Mailing Address: Enter your agency’s complete mailing address.

Application Contact Information: Enter the name, title, email address, and telephone number of the contact person for this application. PTD will contact this person if we have any questions about your application. Also enter the name, title, email address, and telephone number of the person who will sign the grant agreement or who will route the agreement to that person. It is to this person that the agreement will be emailed from the Oregon Public Transit Information System (OPTIS).

Agency Type: Select from the drop-down.

Urbanized Zone: Select from the drop-down. If none of the options fit your agency, choose “Oregon”.

Service Area: Select from the drop-down.

Delegation: If you delegate the administration of STF, check “Yes” and provide the name of the agency to which you are delegating. Otherwise, check “No”.

B. STF Advisory Committee

Check “Yes” or “No” to answer the question: “Do all of the committee members reside within the boundaries of your STF Agency service area?”

Complete the STF Advisory Committee member table with each member’s name, organization, and member category (pursuant to OAR 732-005-0031). Your committee must have five members for counties and districts and three members for tribal governments.

C. Summary of Distribution Plan

This section describes your distribution plan for the 2021-23 biennium and automatically displays your total STF funds and the amount of funds to be disbursed per year and quarter.

In-District and Out-of-District Questions: This section will only appear if you are a transportation district. Complete the STF Allocation Expenditure Plan table if you plan to allocate funds to a reserve account, for contingencies, or for any additional funds. Provide the breakdown by year.

The Administrative Allotment (required by OAR 732-005-0021(5)(b) for receiving, disbursing and accounting for funds) will auto populate.

Planning, Operating and Capital Projects: List each agency receiving funds for each project type. Enter in-district and/or out-of-district funds for each year of the biennium. Use the “Add Item” button to add additional agencies.

Population: Select out-of-district and/or in-district in the table and enter the population. Enter the percentage share that these populations represent. Agencies with populations both inside and outside their district boundaries must provide this information to guide how much money is allocated to in-district and out-of-district areas. Districts are required to allocate a proportionate share of funds to the out-of-district area.

Complete the text box to answer the question: “What is the basis to determine in-district and out-of-district populations?”

D. STF Formula Remaining from Previous Years

Check “Yes” or “No” to answer the question: “Will the STF Agency have carryover STF funds from prior years, including funds from the previous biennium that will be applied to the present biennium?” Do NOT include reserve funds in this section.

If “Yes”, provide the source(s) of carryover funds. Check all that apply:

- Unspent STF funds
- Sale of capital assets
- Interest earned
- Other (describe)

E. Reserve Fund Summary

STF Agencies may establish a reserve fund to save STF funds for a future purpose.

Check “Yes” or “No” to answer the question: “Does the STF Agency have a separate reserve funds account for the STF program?”

If “Yes”, describe the purpose of the reserve fund. If you have more than one reserve fund, itemize them in your description and estimate the reserve account fund balance carried into this period.

F. Transit Agency and Project Descriptions

Describe the projects funded by the STF Formula Program allocations for the 2021-23 biennium.

For each project, complete the following fields:

- Recipient Agency Name
- Address
- Recipient Agency Contact Name
- Recipient Agency Contact Title
- Recipient Agency Contact Email Address
- Recipient Agency Contact Telephone No.
- Project Title
- Project Description
- Total STF funds awarded to the project
- Project Type (from dropdown list)

Select “Add Project” button to list additional projects until all 21-23 funded projects are described.

Project Totals

This field will auto populate.

Fund Allocation

The allocation and disbursement information will auto populate from the information you entered and can be used to check against the project totals.

F. Submitting Your Application

Signature Box

In the Signature Box, use your mouse and sign the application; this serves as your official signature. Type your name in the box next to the signature box. Submitting the application electronically also serves as your certification that the application is complete to the best of your ability.

Document Upload

You may upload any files associated with your projects. This may include GIS files, maps, Coordinated Plan documents, compliance documentation, joint management agreements, etc.

Click the Upload button to begin uploading documents. A small browser window will pop up. If the pop-up window does not appear, make sure your internet browser is not blocking pop-up windows.

Each application has room for 200 MB of uploaded documents. For larger files, consider placing the file on a website or accessible drive such as Dropbox or Google Drive, and linking to the file, rather than uploading it.

Application Submittal

When your application is complete, select the “Save” box at the bottom right corner of the application. This will open a pop-up box to enter your email address. The form software will email you your saved application.

After submitting your application, you should receive an automated email response from PTD with the subject “STF [Agency Name] Submission”. If you do not receive this response, please contact Brian Roth at Brian.Roth@odot.state.or.us or 503-986-3394 as soon as possible.

APPENDIX: REFERENCES

Application-Related Documents

Special Transportation Fund Guidebook

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/stf-guidebook.pdf>

Oregon Vehicle Description and Useful Life Standards

<https://www.oregon.gov/ODOT/RPTD/RPTD%20Document%20Library/Vehicle-Useful-Life-Benchmarks.pdf>

Oregon Group Transit Asset Management Plan

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/ODOT-TAM-Plan.pdf>

Regional Transit Coordinator Contact Information

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/About-RTCs.pdf>

DAS State Vehicle Price Agreement information

How to Purchase a Vehicle Guide

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/How-to-buy-vehicles.pdf>

Oregon Procurement Information System (ORPIN)

<https://orpin.oregon.gov/open.dll/>

State of Oregon Price Agreement – ADA Certified Transit Vehicles Contract Crosswalk

<https://www.oregon.gov/odot/RPTD/RPTD%20Document%20Library/ADA-contract-crosswalk.pdf>

Oregon Buys

<https://www.oregon.gov/das/ORBuys/Pages/vendorregistration.aspx>