



# 2025-2027 Biennium STIF Population Fund & 5310 Federal Formula Fund Requirements and Application Scoring

Prepared Accessible Transportation Work Group | September 18, 2024

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# STIF History: HB 2017



- (HB 2017) *'Keep Oregon Moving'* established STIF.
  - Provides funding for improving, expanding and maintaining public transportation in Oregon.
  - Funded through Oregon Transit Tax: A statewide payroll tax (0.01%).
  - More recent amendment created the **Population Based** formula specifically for transportation that benefits older adults and people with disabilities.



# STIF Funding: Payroll versus Population

## Population Based Funding (*AWG Oversight*)

- Generated through various taxes including cigarettes and offroad gas.
- Distributed statewide based on the percentage of older adults and people with disabilities in each County.
- Approx. \$600,000 annually

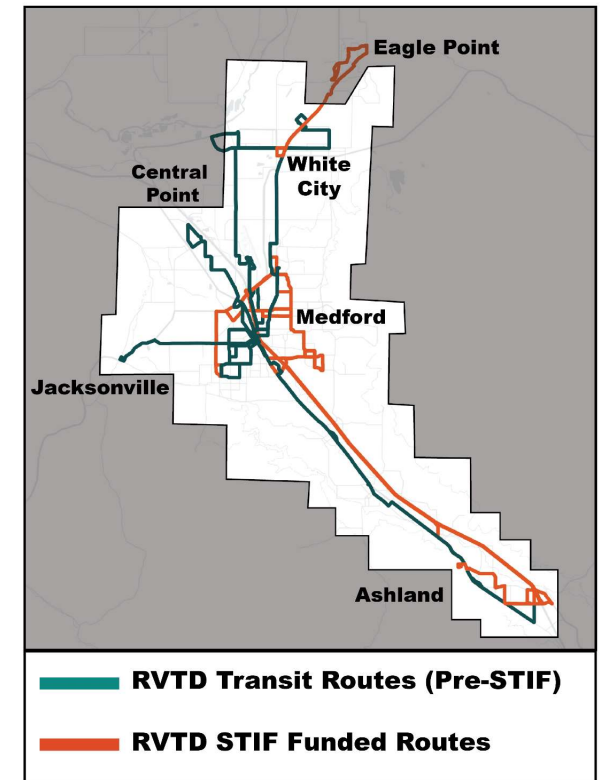
## Payroll Based Funding (*STIFAC Oversight*)

- Generated through Oregon Transit Tax: A statewide payroll tax (0.01%).
- Payroll generated in Jackson County is distributed to RVTD for allocation
- Approx. \$4 Million annually



# STIF Allocations: In District and Out of District

- RVTD is responsible for distributing both types of STIF formula funds assigned to Jackson County consistent with the percentage of qualified populations that reside within the District boundary (shown in white) and outside the District boundary, approximately 75% : 25%.



# STIF Pop Allocations: Requirements

- Recipients must be a Public Transportation Service Provider (PTASP).
- STIF Population Formula Funds are restricted to services that benefit older adults and people with disabilities.
- STIF funds do not require a match, but it can be used as match toward federal or state funding... like 5310.
- Projects funded with STIF Population Formula Funds must be in the locally adopted Coordinated Human Services Public Transportation Plan, “United We Ride” plan.
- AWG should consider the United We Ride plan Goals and Priorities when recommending funding to the RVTD Board.



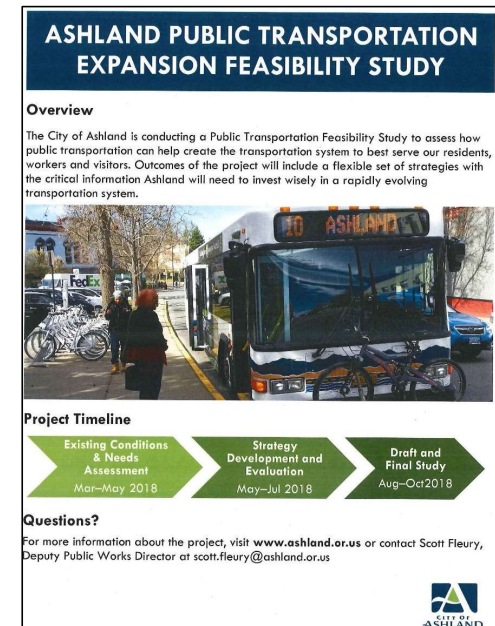
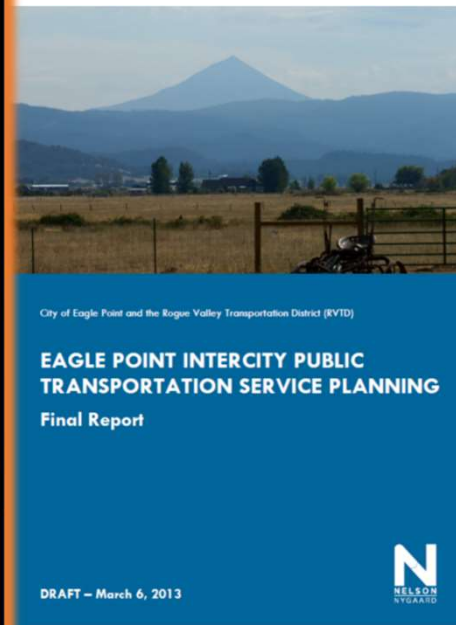
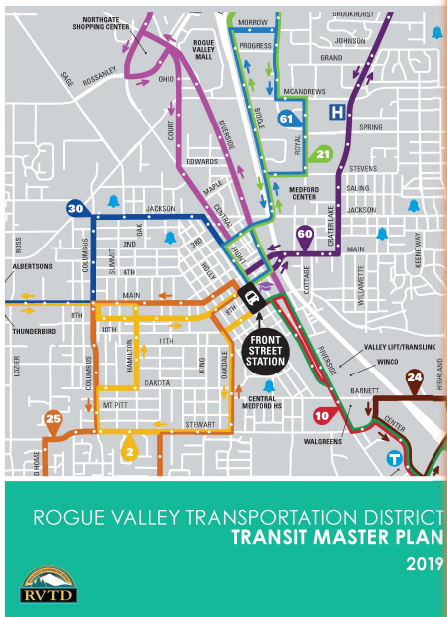
# 5310 Federal Funds: Requirements

- Federal funds distributed to each State for transportation services that benefit older adults and people with disabilities.
- Federal funds can require stricter oversight and obligations of recipients: Capital Asset Inventory, Drug and Alcohol Testing, Federal Procurement requirements, Title VI, etc.
- RVTD receives funds from ODOT based on the % of these populations in the County and primarily uses funds for the Valley Lift service.
- The 5310 requires a 20% match





# STIF Eligible Projects: Locally Adopted Plan



# Solicitation for Projects

- RVTD is required to publish the funding for eligible projects
- Materials are ODOT prepared and RVTD notifies applicants
- The solicitation cycle was open from August 22/27 - September 5, 2024
- Applications will be reviewed by the AWG and then award recommendations will come to the Board of Directors

RVTD Board can:

- Accept the Recommendation
- Return to the committees for modifications
- Make modifications directly before submitting to ODOT





# Next Steps

- This first part of the agenda packet included the materials needed to understand the funding, requirements to apply for funds, the match required of applicants and considerations on how to score the applications.
- AWG Members should review the application once available and score independently.
- The Sept. 18<sup>th</sup> agenda will include time to discuss individual scores and the group will make a recommendation to the Board.
- Prior to the award recommendation public comment will be available to applicants and members of the public (limited to 3 minutes).

