

#### FUNDING WORKSHOP

#### HERITAGE INN | 1700 FOX FARM ROAD | GREAT FALLS, MONTANA | MARCH 12, 2025

#### AGENDA

- 8:15 Introduction & Welcome
- 8:30 Midwest Assistance Program Technical Assistance Montana Rural Water Systems – Technical Assistance
- 8:50 USDA Rural Development Loans & Grants
- 9:10 DNRC Renewable Resource Grants & Loans
- 9:35 Montana Board of Investments Montana INTERCAP Loans
- 9:55 ARPA Water & Sewer Grants
- 10:15 Break
- 10:30 DEQ Drinking Water & Wastewater State Revolving Fund (SRF) Loans
- 10:50 DEQ Lead in Schools & Emerging Contaminants Funding
- 11:10 Infrastructure Funding Montana Legislature and Congress
- 11:25 Department of Commerce Community MT Infrastructure and Planning Grants
- 11:45 Western Montana Conservation Commission Wastewater and Stormwater Grants
- 12:00 Questions
- 12:15 Adjourn

#### **VISIT AGENCY BOOTHS MORE INFORMATION**



Rural Community Assistance Partnership



Midwest Assistance Program (MAP)

Serving Rural Communities Since 1979

#### What We Do

- No-cost technical assistance
  - Water
  - Wastewater
  - Stormwater
  - Solid Waste
  - Utilities serving less than 10,000 people
- No-cost Training for operators, clerks and board members



#### Midwest Assistance Program

serving rural communities since 1979



220,478 Minority Populations Served

147,833 Low-Income Populations Served

951 Overall projects

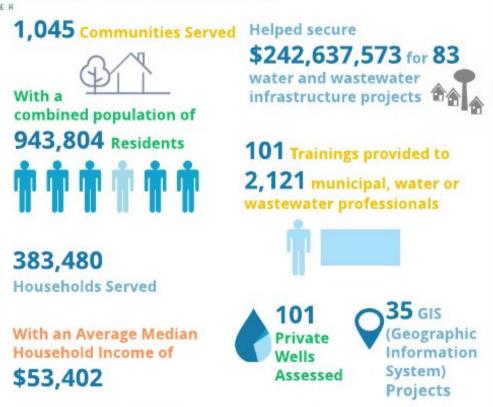
with 567 as New Projects

**145** Meetings with State and Federal Partners to Advocate for Small Communities

660.562.2575

### **IMPACT REPORT FISCAL YEAR 2024**

Supporting communities with drinking water, wastewater, and solid waste solutions since 1979 in Iowa, Kansas, Minnesota, Missouri, Montana, Nebraska, North Dakota, South Dakota, and Wyoming.



WWW.MAP-INC.ORG

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309 E Summit Drive

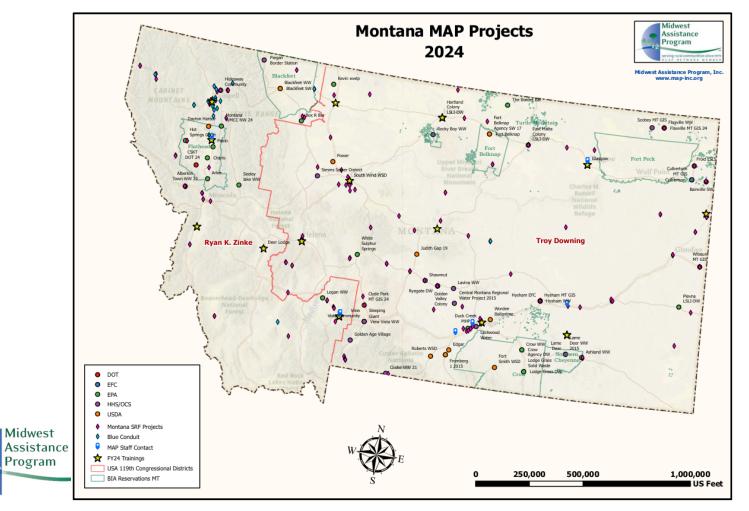
Maryville, MO 64468

Midwest

Program

Assistance

#### Where We Work

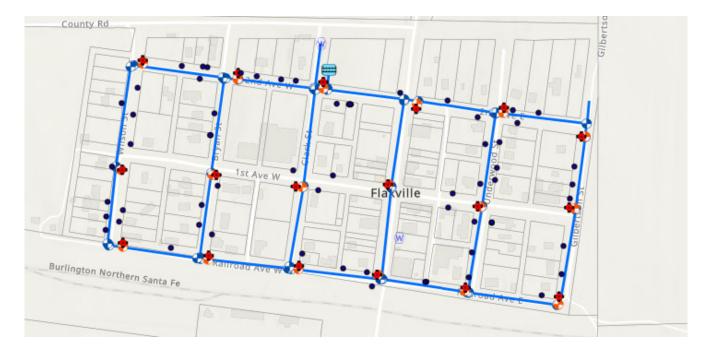


• 12 Communities mapped in the last two years

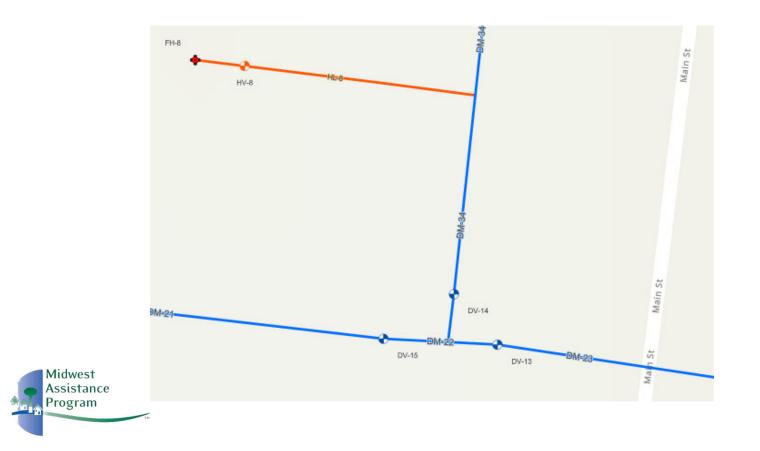
• 7 more planned for this summer

• Mapping environment can incorporate asset management, O&M activities, lead service line inventories, etc.









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	Fire Hydrant		×
6	2 Zoom to		
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Asset Management							
Exp	ected Useful Life						
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Latitude

Longitude







### **Contact Us**





Map-inc.org

Devin Beal State Field Manager <u>dbeal@map-inc.org</u> (406) 290-3325

# 2025 W2ASACT Spring Workshop

Water, Wastewater and Solid Waste Action Coordinating Team





# Montana Rural Water Systems "<u>MRWS</u>" – 45 Years!





# **MRWS** Provides:



- Technical Assistance to water & wastewater specialists & utility clerks and bookkeepers
- Classroom & Virtual Training throughout Montana
- Rate Structuring to pay for O&M, new upgrades and infrastructure improvements
- Regulatory Updates (Water & Wastewater)
- Updates to System's VA/ERP (Vulnerability Assessments / Emergency Response Plans)
- Apprenticeship Training Program for new water & wastewater specialist Montana Rural Water Systems, Inc.

### **Training Topics**

- Leak Detection
- Safety Training
- Pumps & Motors
- Valves & Hydrants
- Source Water Protection
- Lead & Copper, PFAS/PFOS, & CCR Revisions
- Sampling & Monitoring
- Backflow Prevention Assembly Testing
- Rate Structures & Record Keeping
- Operator Training

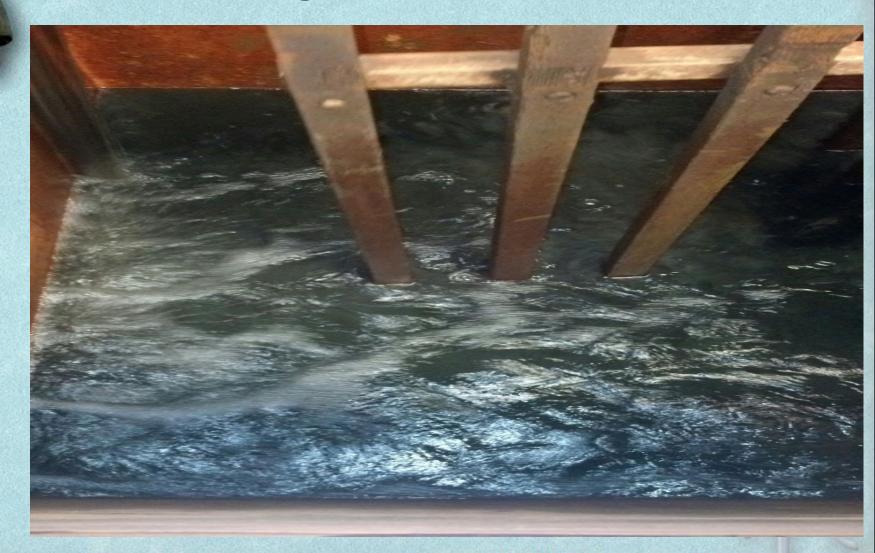
MRWS provided Assistance with the Following Emergencies and Disasters

White Sulphur Springs – June 2012
Brady County W/S Dist. – Aug. 2013
City of Roundup – May 2011
City of Malta – April 2010
City of Red Lodge – June 2022



#### White Sulphur Springs – Tornado June 2012

# Brady WTP – Black Sludge August 2013



# City of Roundup – Flood May 2011

### City of Malta – Security April 2010

## Yellowstone River Flooding City of Red Lodge June 2022



### MRWS Staff



- Water Circuit Riders (3) Dennis, Leo & Bobbie
- Wastewater Technician (2) Kurtis and John P
- Wastewater Decentralized (1) Bill
- MRWS Training Specialist/TA Provider (1) Christine
- EPA Water TA / Training (1) Robin
- Source Water Program (2) Kristi & Kyla
- Apprenticeship Program (1) Lynora
- Technical Assistance / Trainer (1) Roger
- EFC Technical Assistance (1) Nikki
- Administrative Assistant(1) Cody
- Executive Assistant (1) Tanya

### **MRWS** Funding

- National Rural Water Association
  - -USDA/Rural Development
  - -USDA/Farm Service Agency

-EPA

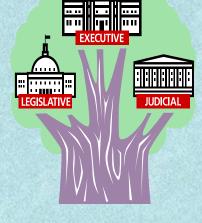
State of Montana

-Department of Natural Resources and Conservation

- System Membership
- Associate Membership

### Who Do We Work With?

**VUSDA/Rural Development**  $\sqrt{DEQ \& EPA}$  $\sqrt{}$  State Funding Agencies  $\sqrt{\text{Suppliers}}$  $\sqrt{}$  Engineers and Consultants √ Most Importantly – MT Water & **Wastewater Utilities** 



### **Funding Agencies in MT**

### Department of Commerce MT Dept. of Commerce

☐ Community Development Block Grant Program &

Montana Coal Endowment Program

### MT Dept. of Environmental Quality DEQ

□ State Revolving Fund Loan Programs

### **MT Dept. of Natural Resources and Conservation**

Renewable Resource Grant & Loan Program



### USDA / Rural Development

Grant & Loan and Planning Grants

#### MT Board of Investments □ INTERCAP



# MRWS...Helping Montanan's and their <u>Utilities</u>!







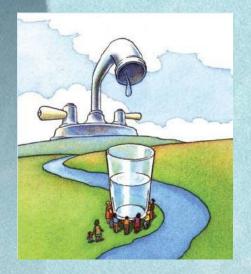
### 2024 Theme <u>Partners for Growth...</u> Investing in Our Future!



Prqwdqd#Jxudd#Zdwhu#V|vwhpv# Whfkqlfdd#Frqihuhqfh#dqg#H{kleWrq#Vkrz Pdufk#45#E47/#5358##KhuWdjh#qq##Juhdw#Idov/#PW Montana Rural Water Systems, Inc.

### Call on....

# Montana Rural Water Systems with your <u>Onsite</u> Technical Assistance and Training Needs TODAY!



9 Third ST N STE 304 Great Falls, Montana 59401 Phone: 406.454.1151 Fax: 406.454.3116 Website – www.mrws.org Email – MTRuralWater@mrws.org

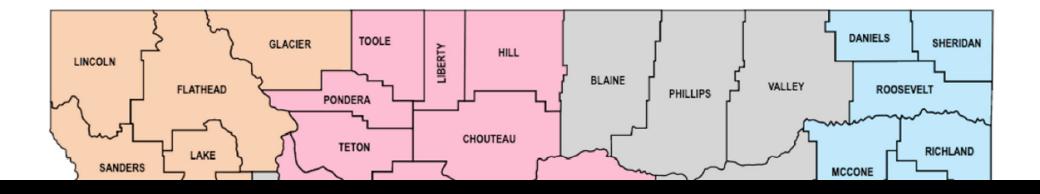


### 2025 Montana Rural Water

March 12, 2025



Rural Development U.S. DEPARTMENT OF AGRICULTURE



### **USDA Area-Level Contacts**



Areas of Eligibility

Entity Facility/Project Population Median Household Income (MHI) Credit Elsewhere Needs Test HOW MUCH ARE YOU INVESTING?

#### WEP Direct Loan Grant Programs

Facility must serve a rural area <10,000 population:

- Units of Local Government-City, Town, County, Special Districts, etc.
- Community Based Non-Profit Corps.
- Federally Recognized Indian Tribes

### WEP Direct Loan Grant Programs

Eligible Loan and Grant Fund Uses:

- Construction
- Engineering and Inspection Services
- Legal Fees
- Land and rights
- Construction Interest \*
- In some cases, startup costs \*
- But, only costs incurred after the date of the balance sheet provided in the application and used for underwriting the RD funding

\*These costs are loan only

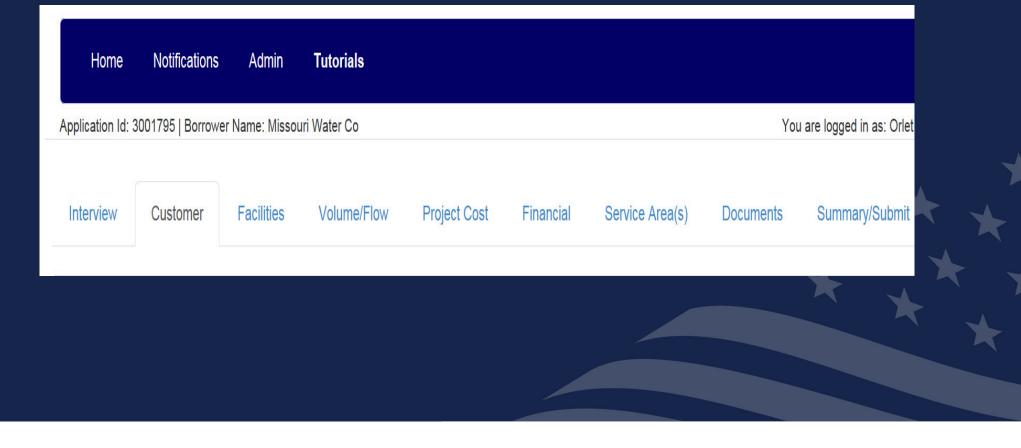
### WEP Direct Loan Grant Programs

- Do you have the right project?
- Are you short water but have not addressed leaks in your water distribution system?
- Are you building a WWTP but have not looked at your I&I?
- Do you have control of the land needed if not, when?

### **Application Data**

- <u>PER</u> Preliminary Engineering Report
- <u>ER</u>–Environmental Report
- <u>Application E-file vs Paper data –</u>.
  - <u>RD Apply</u> online application system
  - <u>https://www.rd.usda.gov/programs-services/rd-apply</u>
- <u>Timing</u> we typically do not have funds from mid August to February each year.

### RDAPPLY https://www.rd.usda.gov/programs-services/rd-apply



#### RDAPPLY <a href="https://www.rd.usda.gov/programs-services/rd-apply">https://www.rd.usda.gov/programs-services/rd-apply</a>

Need to get your eAuth ID (Level 2) Go to website: https:/rdapply.usda.gov Click on Register Click on Level 2 Access Answer the questions <u>- keep your login and password</u>

We can help you through this process

### **Application Data**

• <u>PER</u> – Preliminary Engineering Report

Scoping of the correct project.

Is I&I Addressed?

Water Loss Addressed? Pilot Testing done?

Are the all regulatory deficiencies addressed?

#### Population Projection reasonable?

Based on communities historical population + reasonable historic growth?

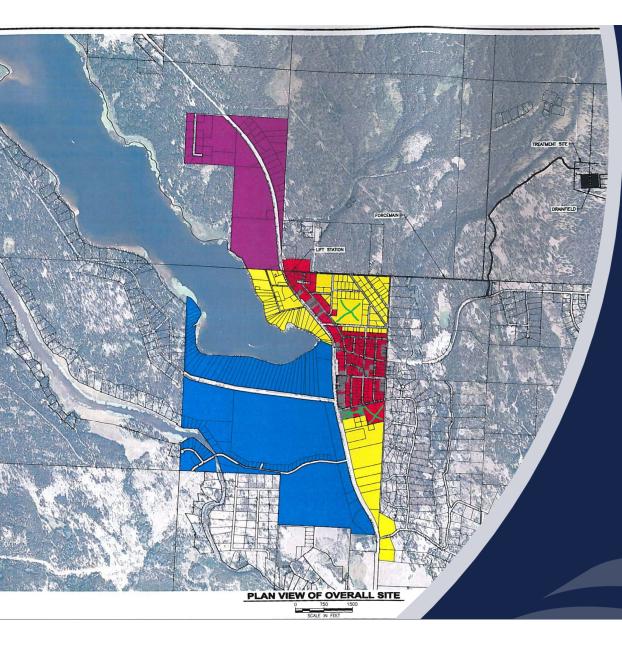
Projection of a significant increase in population related to "proposed" economic development unless first vetted with us before the planning starts!

#### Flow Data

Is the flow data current?

Is there enough information to calculate a flow based EDU?

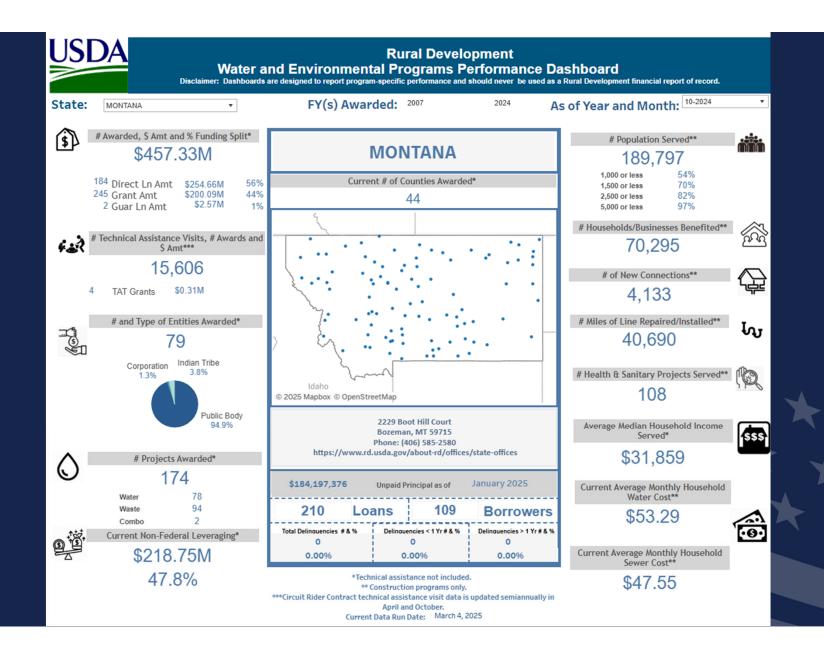
USDA does not use meter size data



# ER – Environmental Report

### ER – Environmental Report

- Complete area of potential effect.
- Contact made with all the required parties.
- The TDAT (HUD Website) for the Section 106 data
   <u>@ https://egis.hud.gov/TDAT/</u>



## Water Programs FY 2025 Regular Allocation

FY 25 Regular Allocation	Loan	Grant
Estimated Allocation based on FY 24	\$6,703,000	\$3,400,000
Expended to Date	\$3,388,000	\$1,201,000
Obligations from NO Funds	Loan	Grant
Persistent Poverty	\$2,562,000	\$2,199,000
FY 2022 Disaster	<u>\$0</u>	<u>\$623,000</u>
Total Obligations Year to Date (\$9,973,000)	\$5,950,000	\$4,023,000
Estimated Remaining Balance (FY25)	\$3,325,000	\$2,199,000

### Water Programs FY 2025 Pending

PENDING	Loan/Grant
FY 2022 Disaster Pending Grant Applications	\$5,648,000
Pending ECWAG Grant Applications	\$593,900
Regular Pending Loan and Grant Applications	<u>\$17,308,000</u>
Total	\$23,549,900

FY 2022 Disaster Grant pooling is March 28, 2025 RD Funds Pooled May 2, 2025 and August 8, 2025

#### Fast Tract for National Office Pooled Funds

- MHI less than 80% of MT NMHI or <\$50,893
- Project removes a qualifying health and sanitary problem
- EDU cost over 1.5% of MHI
- Project score is 90 points or greater

### Additional Funding Opportunities

- Planning Grants SEARCH and Pre-Development
- ECWAG Emergency Community Water Assistance Grants
- Persistent Poverty Counties
- Section 306 (c) Tribal Grants
- 1% Interest Loans

### Water / Wastewater Planning Grants

	Search	Pre-Development	
Population	2,500	10,000	
MHI	<\$50,893	<\$50,893	
Match Required	0%	25%	
Max Grant	\$30,000	\$30,000	
\$125,000/yr in ea	ach program		

### **Emergency Community Water Assistance Grants**

- Helps eligible communities prepare, or recover from, an emergency that threatens the availability of safe, reliable drinking water. The following events qualify as an emergency:
  - Drought or flood
  - Earthquake
  - Tornado or hurricane
  - Disease outbreak
  - Chemical spill, leak, or seepage
- Eligible applicants: State and local government entities, nonprofit organizations, Federally recognized tribes
- Water transmission line grants up to \$150,000 to construct waterline extensions, repair breaks or leaks in existing water distribution lines, and address related maintenance necessary to replenish water supply
- Water source grants up to \$1,000,000 to construct a water source, intake or treatment facility

**Persistent Poverty Counties BIG HORN COUNTY,** BLAINE COUNTY, Loan GLACIER COUNTY, Regular Grant GOLDEN COUNTY, Tribal Grant TOTAL ROOSEVELT COUNTY,

National Allocation

TBD **TBD TBD** TBI

### Section 306 (c) Tribal Grants

Projects for which the applicant is not a federally recognized Tribe, but which benefit Tribal members, may be considered eligible for the Tribal funds if the applicant provides acceptable documentation and certifies that more than 50 percent of the users in the project service area are Tribal members. In such cases, Tribal funds cannot exceed the applicable percentage of the total eligible project cost.

### Funding level TBD

Maximum Grant = \$4,000,000

#### WEP Guaranteed Loans

- Loans are made by a bank or other lender and guaranteed against loss by the USDA Rural Development
- Loans are made at lender's normal and customary rates and terms
- Guarantee allows lenders to make loans that they otherwise could not
- Cannot guarantee loans secured by tax-exempt obligations
- Population limit raised to 50,000 in Farm Bill

#### **MT** Distressed Communities

If your zip code is listed, it is in a distressed community:

Consistent with agency mission, program statute, and Administration goals, Rural Development (RD) has prioritized equitable access to RD programs and benefits for rural residents in communities facing economic challenges.

59003	59022	59031	59034	59035
59038	59043	59050	59054	59066
59069	59072	59074	59075	59089
59201	59213	59225	59231	59255
59327	59417	59422	59427	59435
59444	59454	59456	59460	59461
59466	59521	59522	59523	59526
59527	59529	59531	59535	59545
59830	59831	59845	59855	59856
59846	59866	59872	59910	59923
59926	59934	59935		

### **MT Distressed Communities**

- These communities will likely be eligible for additional priority points when competing for funds
- The 1% loan program may be tied to these zip codes
- FYI the 2024 allocation was \$20 million for the Nation



# Questions







# **RENEWABLE RESOURCE GRANT** and LOAN PROGRAM (RRGL)

#### W<sup>2</sup>ASACT Funding Workshop



March 2025

### **2025 PROGRAM THEME**





### **PROGRAM PURPOSE**



» measurably « **CONSERVE DEVELOP** 

MANAGE PRESERVE

#### **RENEWABLE RESOURCES**

Water, Land, Habitat, Renewable Energy, etc.





### **COMMON PROJECT TYPES**



#### **INFRASTRUCTURE GRANTS – OPEN CYCLES**



#### **EMERGENCY GRANTS**

Local Governments

Up to \$30,000

**Ongoing Cycle** 



NONPOINT SOURCE MUNICIPAL SEWER CONNECTIONS GRANTS

Local Governments

Up to \$100,000 (\$5,000 per connection)

Applications due April 14, 2025



#### TECHNICAL ASSISTANCE GRANTS

Local Governments

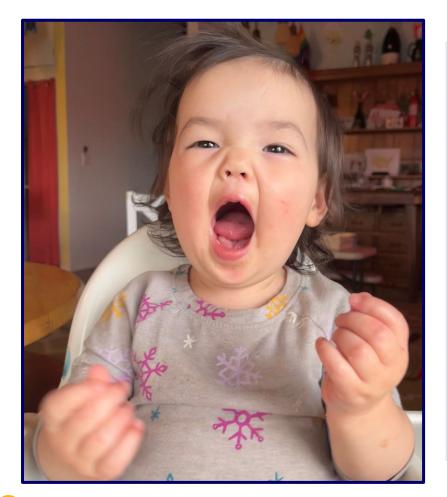
\$3,000

**Ongoing Cycle** 



DNRC Renewable Resource Program | March 2025

#### **INFRASTRUCTURE GRANTS – UPCOMING CYCLES**





**PROJECT GRANTS** 

Local Governments

Up to \$125,000

Expected Opening: February 2026

Deadline: May 15, 2026



#### **PLANNING GRANTS**

**Local Governments** 

Up to \$40,000 (varies by project type)

**Expected Opening:** Late Summer 2025



#### **PROJECT GRANT APPLICATION CYCLE TIMELINE**

2025	July – September	DNRC Internal Preparation
	October – January	DNRC Outreach and Information Sessions
	February	Application Cycle Opens
2026 Ju	May 15 <sup>th</sup>	Application Cycle Closes
	June – September	DNRC Review and Ranking
	October – December	Governor's Budget Published with Application Ranking
2027	January – April	Legislative Process via House Bill 6, 8
	May – June	Notification of Awards



#### **OTHER GRANT TYPES**

NONPOINT SOURCE PROJECT GRANTS

**Public and Private Entitles** 

Up to \$50,000

**Opening: Next Week** 

Applications due April 14, 2025



#### IRRIGATION DEVELOPMENT GRANTS

**Public and Private Entities** 

Up to \$50,000

Expected Opening: 2026



PRIVATE GRANTS

**Private Entities** 

Up to \$5,000

Expected Opening: Summer 2025



DNRC Renewable Resource Program | March 2025

### **MEET THE GRANT MANAGERS**



**Melissa Downing** Watershed Grants Project Grants



Mia Belting Project Grants



**Bobbie DuBose** Private Grants Project Grants



**Nina Denny** Nonpoint Source Grants Emergency Grants Project Grants



Katherine Certalic Planning Grants TA Grants Project Grants



Ann Kulczyk Irrigation Grants Project Grants

### **STAY INFORMED**



#### **UPCOMING GRANT CYCLES:**

- Check the RRG website
- Join the RRG mailing list
- Find our booth outside

#### **GRANTS IN HOUSE BILL 6:**

- Visit <u>legmt.gov</u> to track HB6
- Monitor your email
- Monitor Submittable messages





# WASACT Workshop 2025

# MONTANA BOARD OF INVESTMENTS INTERCAP

# Loans

- Since 1987, INTERCAP has been a valuable, low interest loan resource for over 550 Montana governments.
  - Water, Sewer and Solid Waste Districts
  - Irrigation Districts
  - Counties
  - Cities and Towns
  - Rural and Special Improvement Districts
  - Street Maintenance Districts
  - State Agencies and Universities
  - School and Fire Districts
  - Tribes
  - Other Governmental Entities

# We finance

- Preliminary engineering and grant writing work
- Interim financing for construction
- Water, wastewater, solid waste, and irrigation district revenue bonds for construction or equipment

- New and used vehicles
- New and used equipment
- Energy retrofit projects
- Real property purchases and improvements



# Program Basics

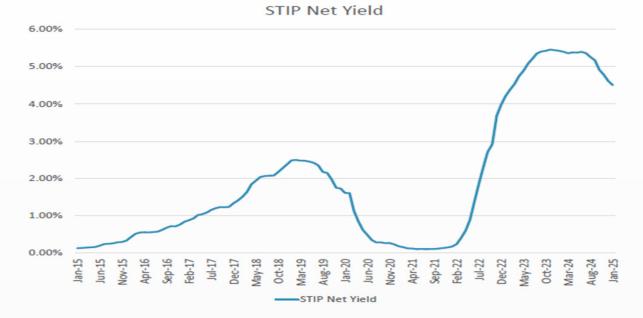
- Low-interest loan program
- Variable interest rate
  - New rates are effective
     every February 16
  - Average rate over the last 15 years: 2.61%
  - Current rate: 5.00% (5.82% existing, no autopay)
- Loan term is either; Statutory limit, Fifteen years OR the useful life of the project, whichever is less

## Team Montana

- Since 2022:
  - Annual bond issue/remarketing cost paid by borrower Loan Rate ELIMINATED.
  - The bond used to fund the INTERCAP loans interest is now paid to Montana's Short-Term Investment Pool (STIP) participants.
- Bond and Loan Rate reset every February.
- Bond Rate to STIP participants is based on mid-point 1-year Treasury on February 14 plus 0.10%.
- Borrower Loan Rate is Bond Rate, plus up to 1.50% for program operating.
- 5.00% is this year's autopay Loan Rate (4.321% Bond Rate to STIP + 0.679% program operating spread).

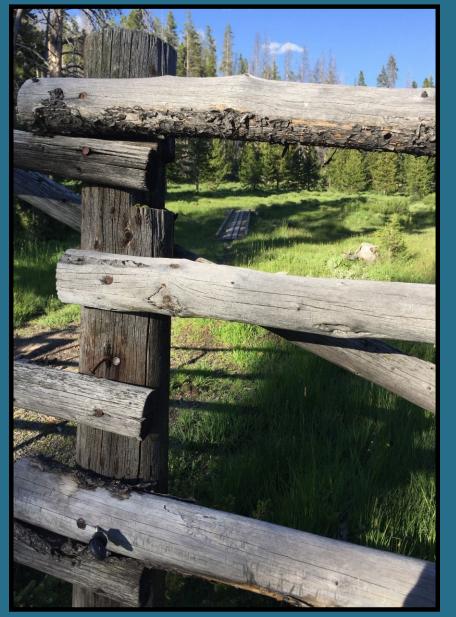
## Short-Term Investment Pool (STIP)

- Created by the Legislature in1973 as an investment vehicle to manage state and local government cash. A safe, convenient option to invest and withdraw cash with 24-hour notice.
- A STIP reserve account is maintained that may be used to offset realized gains or losses. Additionally, the reserve will be available to limit fluctuations in the net asset value (NAV), to the extent deemed prudent by staff.
- STIP portfolio: ≈\$8.5 Billion
- Participant earnings generated calendar year 2024: \$409.4 Million



MBOI – INTERCAP March 2025

## Loan Servicing



- INTERCAP Loan Servicing
  - Since 2022, MBOI directly manages all phases of the loan servicing previously contracted by indenture of trust to a private bank.
- Autopay is required for new loans.
- No Vehicle/Equipment Liens required

MBOI – INTERCAP March 2025

# After Loan Approved

- INTERCAP disburses funds based on submitted invoices
- Loan Repayments due every February 15 and August 15
- Updated payment schedules mailed out every
  - January
  - March (new rate)
  - June

## Application

There is a short fillable form the Borrower can submit securely online.

- No match required
- No upfront fees
- No prepayment penalty
- No application deadline
- Reviewed on first-come-first-served basis
- Typically takes 4-8 weeks from application to funding
- Staff approves loans up to \$1 million
- Available online <u>www.investmentmt.com/INTERCAP</u>

#### www.investmentmt.com/INTERCAP

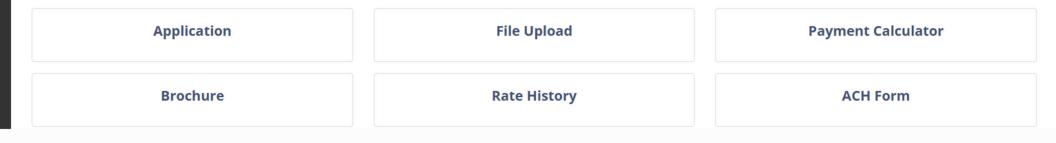


#### INTERCAP

Since 1987, INTERCAP has been a valuable, low interest low resource for eligible Montana government units as defined under 17-5-1604, MCA. The INTERCAP program is a variable rate loan program, where interest rates are adjusted on February 16th of each year. Eligible projects have wide flexibility, e.g. new and used equipment and vehicles, real property improvements, cash flow, preliminary engineering costs, and grant writing. Maximum loan term limit is 15 years, statutory limit, or useful life of the project, whichever is less.

NEW SIGN-IN FOR FILLABLE FORMS APPLICATIONS - JUNE 20, 2022

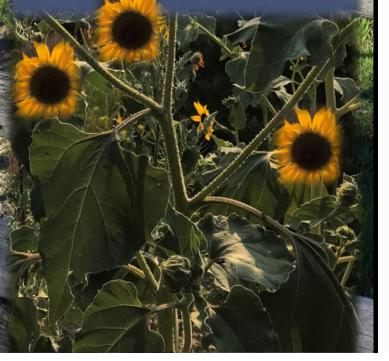
INTERCAP Interest Rate 5.00%\* - February 16, 2025 through February 15, 2026 \*Existing loans not setup in autopay will have a 5.82% rate.



### MONTANA BOARD OF INVESTMENTS



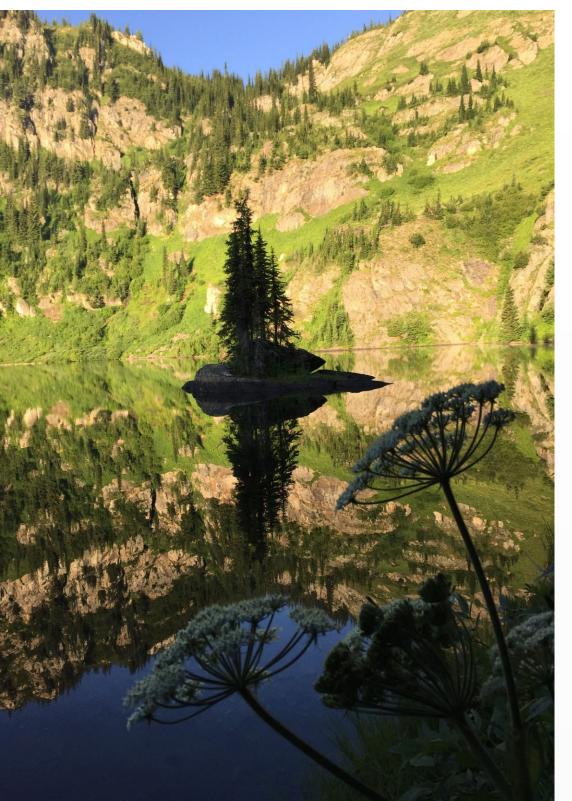
#### Montana Housing Assistance Programs



The Montana Housing Infrastructure Revolving Bond Program is designed to help local governments and housing developers lower the cost of infrastructure development.

- $\square$  Low fixed-rate financing for up to 20 years.
- Funds may be used to expand or extend water, wastewater, storm water, street, road, curb, gutter, and sidewalk infrastructure to serve new or rehabilitated residential development.
- ☑ Local governments or security co-purchaser may apply online. BOI to participate in up to 50% of a local government security at a rate up to 25% of the co-purchaser's rate (exclusive of any fees).
- ☑ Program requirements:
  - Minimum gross density of 10 units for each acre.
  - Local government must waive or offsets all impact fees for the developer up to the amount of the security.
  - BOI bond counsel review required at borrower expense.

MBOI – Housing Assistance March 2025



### Questions?

#### <u>www.investmentmt.gov</u> 406-444-0001

#### Louise Welsh Director of Municipal Loans <u>Lwelsh@mt.gov</u>

Peggy Saarela Credit Analyst <u>Peggy.Saarela@mt.gov</u>



# MERICAN RESCUE PLAN ACT

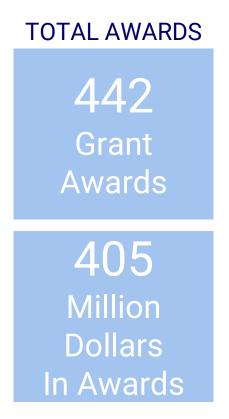
THE

Water & Sewer Grants

**Working Together to Finish Strong** 

March 2025

#### **DNRC ARPA Program Statistics**





### **Completed Grants: 170**

### Active Grants: 272

55% ARPA Funds EXPENDED

For more information visit



**DNRC ARPA Program Deadline** 

## December 31, 2025

Must EXPEND all DNRC ARPA Grant Funds and minimum required match.

### 90 days to provide:

- Final Reimbursement Request
- Final Report
- Submittal and Closing Documents





For more information visit

### **ARPA Grant Management**





For more information visit



Subrecipient	Project Title	Project Location (County)	ARPA Grant Manager	ARPA Grant Agreement 1	Contract Status*	Grant Agreement 1 Term Date	ARPA Grant Agreement 2	Contract Status 2*	Grant Agreement 2 Term Date	ARPA Grant Agreement 3	ARPA MAG Transfer County	Submittable Submission ID	Name of System	Total Minimum Allocation Grant Amount
Alberton, Town of	Alberton Water System Improvements	Mineral	<u>Katherine</u> <u>Certalic</u>	AM-22-0064	Under Contract	12/31/2024	AC-22-0075	Under Contract	12/31/2024		Mineral	21354562 22223446	Alberton Water System	\$88,369
Anaconda-Deer Lodge County	Anaconda-Deer Lodge Wastewater Collection System Improvements	Anaconda-Deer Lodge	<u>Katherine</u> <u>Certalic</u>	AM-22-0018	Under Contract	12/31/2024		5				20754056	Anaconda - Deer Lodge County Wastewater	\$170,773
Anaconda-Deer Lodge County	Anaconda-Deer Lodge Water Distribution System Improvements	Anaconda-Deer Lodge	<u>Katherine</u> <u>Certalic</u>	AMC-23-0004	Completed	9/30/2023				13		22235632	Anaconda-Deer Lodge Water	\$621,764
Bainville, Town of	Bainville Water Supply Improvements	Roosevelt	Seth Shteir	AM-23-0209	Under Contract	12/31/2025					Roosevelt	31853246	Bainville Water System	\$110,585
Baker, City of	Baker Well Waterline Upgrade	Fallon	Seth Shteir	AMC-23-0003	Under Contract	9/30/2024						22262126	Baker Water System	\$422,400



For more information visit







SHAWNA SWANZ ARPA Program Supervisor



**RACHEL GEMAR** ARPA Compliance Program Lead

#### **ARPA INSPECTORS**



JOEL CHAVEZ ARPA Inspector



LINDSEY GLASTETTER ARPA Grant Manager



COLEEN O'ROURKE ARPA Irrigation Program Lead



ARPA Grant Manager



**CHRISSY THOMPSON** ARPA Grant Manager



**BILL SNODDY ARPA** Inspector



#### For more information visit

### **CONSTRUCTION SEASON 2025**





For more information visit

### **HIGH PRIORITY PROJECTS**





For more information visit

#### DNRC ARPA Program Reminders

#### Tuesday, March 25...... ARPA Grants Check-in Webinar Tuesday, April 15...... 2025 Q1 Progress Report Due June + July 2025 ...... DNRC Fiscal Year End Wednesday, December 31....Program Deadline



For more information visit

### QUESTIONS

Shawna Swanz ARPA Program Supervisor shawna.swanz@mt.gov



#### Drinking Water & Water Pollution Control State Revolving Fund Programs





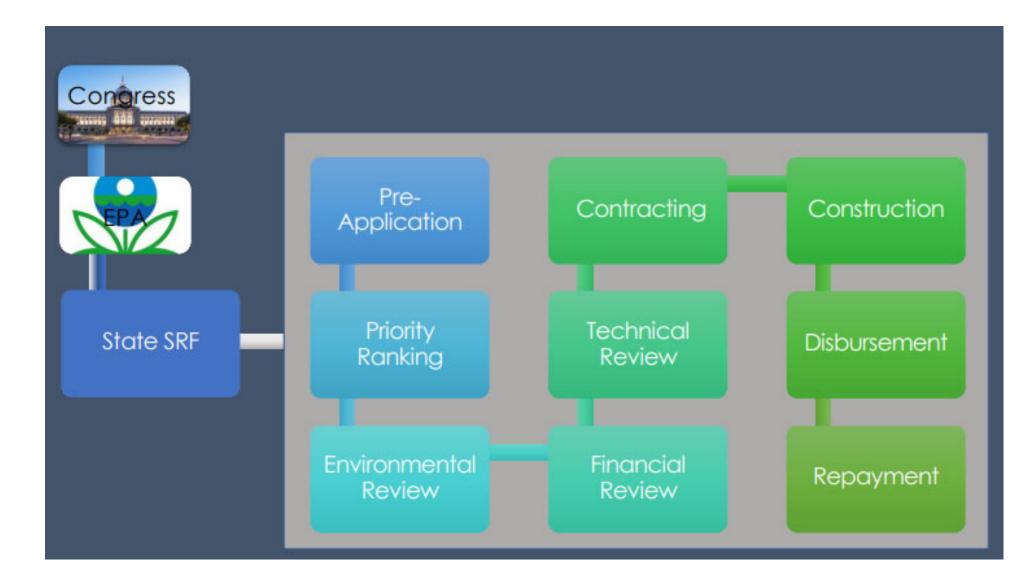
## A LITTLE SRF HISTORY

 Water Pollution Control State Revolving Fund (WPCSRF)

Established 1987 (1972 CWA Amendments)

- WPCSRF dollars to date \$800 million
- Drinking Water State Revolving Fund (DWSRF)
   Established 1996 (1974 SDWA Amendments)
- DWSRF dollars to date \$550 Million

### **SRF PROCESS**



#### State Revolving Fund Programs

## **BENEFITS OF AN SRF LOAN**

- No Application Deadline
- Interest Rate 1.5% to 2.5%
- Loan Term 20, 30, 40 (DWSRF Only)
- Interim Financing up to 3 years
- Refinancing of existing debt

### Who Can Apply for an SRF Loan?

 Public Entities – Municipalities, W&S Districts (Not HOA)

- Private Entities
  - Nonpoint source pollution control projects
  - Community drinking water project

## TYPES OF SRF FINANCIAL ASSISTANCE

- **\* Direct Loans** 
  - •Planning
  - Engineering
  - Construction
  - Equipment

### **TO QUALIFY FOR AN SRF LOAN**

- ✓ Protect Public Health (DWSRF & WPCSRF)
- Protect / Improve Water Quality (WPCSRF)

#### HOW TO – Your Part

> Submit a Survey Form to get on the Priority List

•WPCSRF
•DWSRF (includes LSLR)
•DWSRF Emerging Contaminants(EC)

- Submit a Uniform Application (PER & Env. Docs)
- > Establish rates and charges to cover loan and O&M
- > Repay the loan

#### HOW TO – Our Part

- Update the Intended Use Plan (IUP) Apr to June
   Determine Eligibility
   Rank Projects multiple criteria
   Update the Project Priority List (PPL)
- > Draft Environmental Documents
- > Review Project Plans and Specifications (waive fees)
- > Review Financial Documents & Prepare Loan Docs
- > Manage Loan Repayments

### **Continuing Requirements for** SFY 2025/2026

- Federal Davis-Bacon & State Wage Rates (highest)
- BABA Build America Buy America Requirements
  - Iron and Steel

SL0

- Manufactured Products
- Construction Materials
- Or AIS American Iron and Steel (2014)
- A bunch of government red tape stuff

SL0	Are we trying to include all other fed construction requirements in here? Should we include Davis Bacon, single audit, other?
	Lipetzky, Steve, 2025-02-24T15:36:56.537

Slide 10

### BIL

BIPARTISAN INFRASTRUCTURE LAW (AUTHORIZED THROUGH FFY 2026?)

Expanded Base SRF Funding (Supplemental)

#### Emerging contaminants

(e.g., PFAS, pharmaceuticals, manganese, etc.)

### Lead service line replacements (DWSRF program only)



## DRINKING WATER SRF PROGRAM

#### State Revolving Fund Programs

#### **DWSRF PROGRAM**

#### **Eligibility Key = Public Health**

### Not Eligible = Projects Primarily for Growth Fire O&M

State Revolving Fund Programs

## **Eligible Project Categories DWSRF PROGRAM**

✓ Source Development ✓ Storage

✓ Treatment

✓ Distribution

✓ Consolidation

✓ Create New Systems

✓ Security

✓ Energy Efficiency

## PRINCIPAL FORGIVENESS

#### **Disadvantaged Community**

**\*DOC - Target Rates vs. projected rates** 

**\*DOC** – LMI% and Poverty %

Maximum forgiveness based on cash flow & demand (typical is 50%, max \$3 million)

#### **Disadvantaged Schools (PWSs)**

**Students receiving free or reduced lunch exceeds 20%** 

Maximum based on cash flow & demand (typical is 75% forgiveness)

#### **BIL - LEAD SERVICE LINE AND EC**

#### Lead service line replacement (LSLR) funding

Planning, LSL inventories, design, non-routine lead sampling, full LSL replacement, temporary filters, etc.

**\***Disadvantaged Communities - 60% principal forgiveness

#### **Emerging contaminants funding (primary purpose)**

Planning, design, pilot studies, treatment, new source, consolidation, new PWS, etc.

**\***100% loan forgiveness (current IUP - cashflow and demand dependent)

#### **DWSRF SET-ASIDES \$\$** (NON-PROJECT ACTIVITIES)

### >DEQ

Source Water Protection Program
Operator Certification Program
Capacity Development
PWS Program

### >Technical Assistance Provider (MAP)

### >DOC – LSLR Technical Assistance



## WATER POLLUTION CONTROL SRF PROGAM

State Revolving Fund Programs

### Eligible Project Categories WPCSRF PROGRAM

- Centralized Wastewater Treatment
- Energy Conservation
- Water Conservation
- Stormwater
- Agricultural Best Management Practices
- Decentralized Wastewater Treatment
- Resource Extraction
- Contaminated Sites

- Landfills
- Habitat Protection and Restoration
- Silviculture
- Desalination
- Groundwater Protection and Restoration
- Surface Water Protection and Restoration
- Planning/Assessment
- Others?

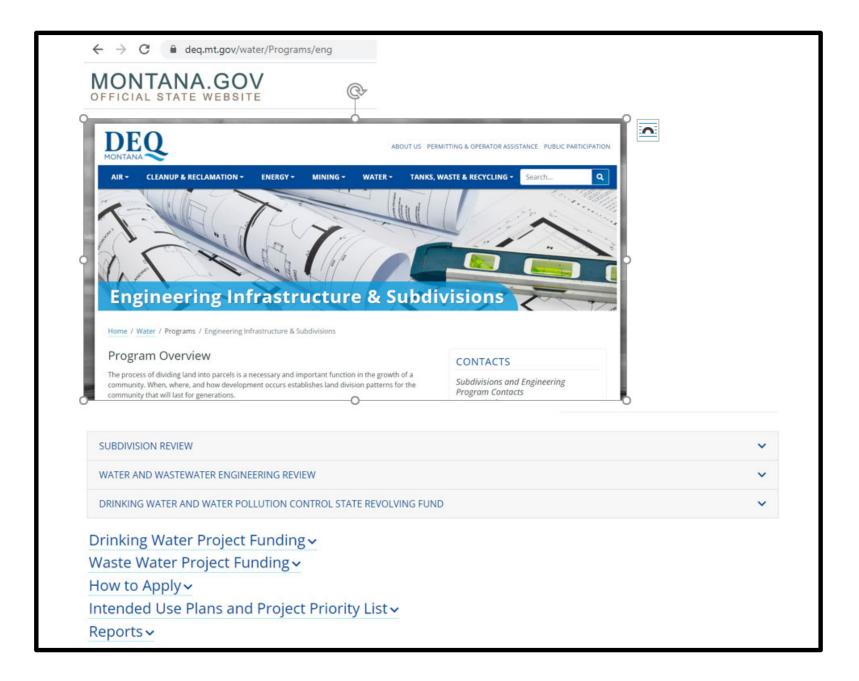
#### **WPCSRF PRINCIPAL FORGIVENESS**

#### > Percentages & Amounts Available Depend on:

- ✓ Federal Appropriation
  - Base (20% 40%)
  - Supplemental (49%)
- ✓ Cash Flows
- ✓ Demand / Project Readiness
- > Affordability Criteria target disadvantage communities
  - ✓ User Rate/MHI
  - ✓ Unemployment Rate
  - ✓ Population Trends
  - ✓ Community Size
  - ✓ LMI Percentage
- > Must take out long-term SRF Loan
  - ✓ Capped at a 49% of loan amount or \$850,000; whichever is less.

#### WPC EMERGING CONTAMINANTS CAP GRANT

- ► FFY24 \$1,043,000
- ► 100% Forgivable Loan
- "(Emerging contaminants) refer to substances (including microorganisms)... that may pose newly identified or re-emerging risks to human health, aquatic life, or the environment".
  - ✓ perfluoroalkyl and polyfluoroalkyl substances (PFAS)
  - ✓ compounds of personal care products
  - ✓ pharmaceuticals
  - ✓ industrial chemicals
  - ✓ pesticides
  - ✓ microplastics.
- Eligible projects must treat, remove, or trap the targeted contaminant.
- Funds can only be used for capital costs such as construction activities or the purchase of equipment used for treatment.



#### State Revolving Fund https://deq.mt.gov//water/Programs/eng

#### **DWSRF Program**

Rachel Clark Acting Supervisor Rachel.clark2@mt.gov 406-444-1277

**Rob** Ashton

**Denver Fraser** 

**Sandie Koenig** 

**Open Position** 

#### **SRF Financial**

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Linda Beckstrom

**Cid Sivils** 

**Abby Weimer** 

**Brendan Goble** 

#### **CWSRF Program**

Mike Abrahamson mabrahamson@mt.gov 406-444-6776

**Pete Behrends** 

**Travis Dunkle** 

**Steve Lipetzky** 

**Michele Marsh** 

Josh Viall\*

#### State Revolving Fund Programs

### **Funding Programs**





EMERGING CONTAMINANTS FOR SMALL OR DISADVANTAGED COMMUNITIES GRANT PROGRAM LEAD IN SCHOOLS

### **Emerging Contaminants**

- Emerging contaminants (ECs)are chemicals or materials characterized by a perceived, potential, or real threat to human health or the environment or by a lack of published health standards.
- A contaminant also may be "emerging" because of the discovery of a new source or a new pathway to humans. Emerging Contaminants can be found in pharmaceuticals, fragrances, fire retardants, detergents, insecticides, and industrial chemicals.
- There are over 200 compounds classified as Emerging Contaminants.
  - PFOA/PFOS compounds, Manganese, Lithium, Sodium, and Sulfate.

### ECs for Small or Disadvantaged Communities Grant

- MT has been awarded a total of \$18.9 million for FFY22 and FFY23.
- Uncertainty with future funding (FFY24, FFY25 and FFY26)
- Grant program with no match requirement. (in development)
- Have to complete a Project Priority Survey Form to be eligible
- Eligibility
  - Project has to be primarily for addressing Emerging Contaminant
  - Small System defined as serving less than 10,000 customers or meets Disadvantaged Status
  - Public and Private Community Water Systems and non-profit non community non transient water systems

### **Eligible Projects for ECs**

Eligible Projects include:

- Emerging contaminants costs associated with the construction of a new treatment facility or upgrade to an existing treatment facility that addresses emerging contaminants.
- Development of a new source (i.e., new/replacement well or intake for a public water system) that addresses an emerging contaminant issue [Note: water rights purchases must still meet the criteria in the Class Deviation for Water Rights].
- Consolidation with another water system that does not have emerging contaminants present or has removal capability.
- Costs for planning and design and associated pre-project costs.
- Infrastructure related to pilot testing for treatment alternatives.
- Creation of a new community water system to address unsafe drinking water provided by individual (i.e., privately-owned) wells or surface water sources.

## Lead In School Funding

- HB-5 Section 5 (10) 2023 session
  - The following money is appropriated to the department of environmental quality in the indicated amounts for grants that reduce exposure to lead in drinking water at school facilities.
    - One Time Only State General Fund
    - \$3,700,000
    - Costs accrued after July 1, 2023 are eligible
    - Funding has to be spent by June 2025
    - Funding could be extended 2 years (HB-234)

## **Funding Info**

Lead Mitigation Reimbursement Program

- Reimbursement up to \$100,000 (max of \$25,000 for labor)
  - \*\*Subject to change based on need and availability
- Schools will apply through a simple online form on the lead in school's webpage. Invoices/expenses can be attached to the form and submitted. <u>https://deq.mt.gov/water/programs/dwlead</u>
- Eligible Schools
  - Have completed their initial sampling round
  - Costs have to be related to addressing lead in their drinking water



### Lead in Schools

Greg Montgomery

Public Water Supply

#### DEQ

406-444-5312

Gregory.Montgomery@mt.gov

#### Emerging Contaminants

Neal Murray Public Water Supply DEQ

406-444-3425

Neal.Murray@mt.gov

## Montana Department of Commerce Infrastructure Grant Funding Opportunities

Jeanette Blize, Outreach Coordinator Rosie Goldich, CDBG Coordinator

March 12, 2025



## Community MT Division Planning Programs



## Community Technical Assistance Program

**Direct Community Assistance**:

- Comprehensive Community Planning
- Land Use Planning Act
- Subdivision regulations and review
- Zoning regulations and administration
- Downtown masterplans
- Housing, building assessments
- Capitol improvement planning



CTAP staff and consultant conducting a public outreach meeting to gather community input for Lewistown's Land Use Plan. Photo credit: Montana Department of Commerce, 2024.

## CTAP

## Statewide Assistance and Resources:

- Model documents and planning resources
- Community Planning Platform and data resources
- On-site and virtual trainings and workshops
- Review and guidance on draft plans and policies



## Community Development Block Grant Planning Grants

#### **Eligible Activities:**

- Growth policies
- Capital improvements plans
- Housing plans and market studies
- Historic and architectural preservation plans and studies\*
- Downtown revitalization plans and studies
- Preliminary engineering and architectural reports\*
- Site-specific plans and studies for economic development\*

\*>51% Low- and moderate-income requirement

## **CDBG Planning Grants**

**Application cycle:** Biannual, Late Spring and Fall 2025

**Match:** 25% of total planning project cost (1:1 for private economic development projects)

Max Grant: \$50,000

## Montana Coal Endowment Program Planning Grants

#### **Eligible Activities:**

- Preliminary engineering reports for:
  - Drinking water systems
  - Wastewater treatment facilities
  - Sanitary or storm sewer systems
  - Solid waste disposal and separation systems
  - Bridges
- Comprehensive capital improvements plan

## MCEP Planning Grants

Application cycle: Biennial, odd years

Applicants are eligible for up to four grants per cycle:

- Two PERs (One for a water, wastewater, stormwater or solid waste project each)
- One comprehensive CIP; and
- One bridge CIP or PER

Match: 20% of total planning project cost Max Grant: \$40,000

## Community MT Division Construction Programs and Grants



## CDBG Low- and Moderate-Income Requirement

 2016-2020 American Community Survey Low- and Moderate-Income Summary Data Map effective Aug. 1, 2024

- Available on HUD's website:
  - <u>https://hud.maps.arcgis.com/home/item.html?id=279eca0222754f8a954b</u>
     <u>bf8cf995a1a3#overview</u>

## CDBG Community and Public Facility Grants



Helena Food Share. Photo credit: Montana Free Press. 2024. • Eligible Activities:

- Construction, expansion or upgrades to water, wastewater, sewer, stormwater systems
- Community Facilities (senior centers, food banks, community centers)



- Application Cycle: Fall 2025 (annually)
- Match: 25% of CDBG award
- Max Grant: \$750,000

## **MCEP** Construction Grants

#### **Eligible Activities:**

- Drinking water systems
- Wastewater treatment facilities
- Sanitary or storm sewer systems
- Solid waste disposal and separation systems
- Bridges





Source: Sun Prairie Village County WSD Wastewater System Improvements. Photo credit: Montana Department of Commerce, 2023

## **MCEP** Construction Grants

Application cycle: Biennial, even years

Match: 100% of MCEP award

Max Grant: based on user rates at project completion

Water, wastewater, storm sewer and solid waste projects:

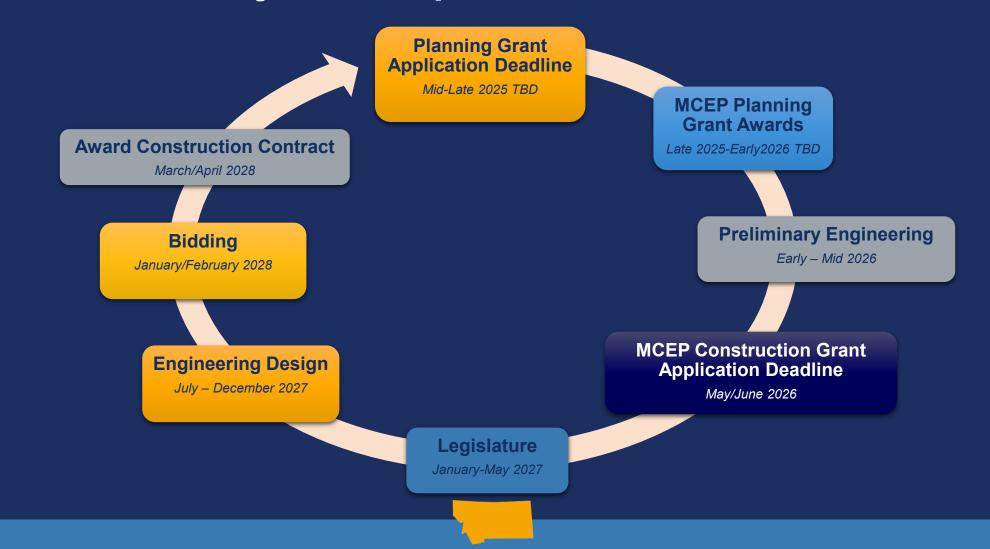
- Up to \$500,000: User rates are less than 125% of target rate
- \$500,000 \$625,000: User rates must be between 125% and 150% of target rate
- Up to \$750,000: User rates must be at least 150% of target rate

Bridge projects are limited to a maximum of \$500,000



Source: Sun Prairie Village County WSD Wastewater System Improvements. Photo credit: Montana Department of Commerce, 2023

## **MCEP Project Implementation Timeline**



Source: based on Project Implementation Timeline created by Great West Engineering

## MCEP Emergency Grants

#### **Eligible Activities:**

Project must be the result of reasonably unforeseen circumstances and not the result of normal use, age, deterioration, negligence or inadequate operations and maintenance on the part of the owner.

- Drinking water systems
- Wastewater treatment facilities
- Sanitary or storm sewer systems
- Solid waste disposal and separation systems
- Bridges

## MCEP Emergency Grants

#### **Application cycle:**

Open, allocation opens July 1 of odd years, following Legislative authorization, and remains available until funding is fully awarded to projects.

Match: None

Max Grant Award: \$30,000

## Montana Coal Board Project Grants

#### **Eligible Projects:**

Any governmental services that are needed as a direct consequence of an increase or decrease of coal development or of an increase or decrease in the consumption of coal by a coal-using energy complex.



Sibanye Stillwater Mine. Photo credit: Montana Department of Commerce, 2023.

## Montana Coal Board Grants

#### **Application Cycle:**

Quarterly, 45 days before each Coal Board meeting:

- April 21, 2025
- July 28, 2025
- Oct. 27, 2025
- Match: None
- Max Grant: Dependent upon request/need

# Additional Community MT Programs and Grants

- Montana Main Street
- Montana Historic Preservation Grant Program
- Montana Emergency Tourism Assistance Program
- Montana Community Reinvestment Act
- State-Local Infrastructure Partnership Act
- Lead Service Lines Technical Assistance



Boulder Hot Springs. Photo credit: Peace Valley LLC. 2024

## Keeping up with Commerce

#### Scan to sign up for Montana Department of Commerce Newsletter



Questions about how to fund your project? Visit the Commerce table.

doccdd@mt.gov

406-841-2770



## WMCC Grant Programs **Funding Opportunities** March 12th, 2025

## Who is WMCC?

**ESTABLISHED** July 1, 2023

#### **MISSION**

Water quality protection + AIS mitigation & prevention

#### WHERE WE SERVE





1983 - 2023





WESTERN MONTANA Conservation Commission

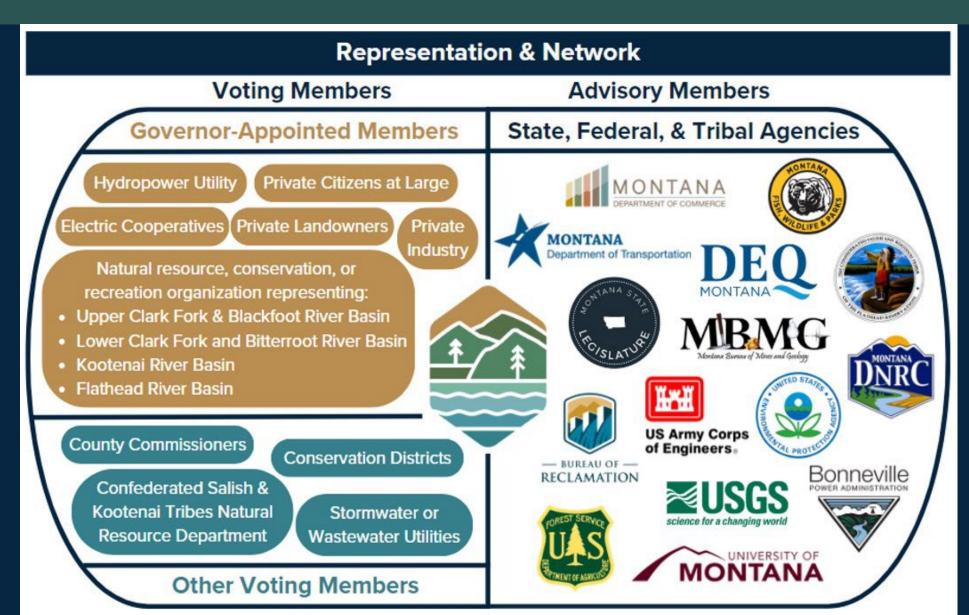


western montana Conservation Commission

## Where We Serve



## Who is on the Commission?



# What do we do?



## WMCC Committees



Executive Committee Meets Every 2 Weeks



Education, Outreach & Communication

Aquatic Invasive Species

On-site Wastewater Treatment Stormwater Advisory Council EPA Grant Driven



Monitoring & Coordination

## **On-site Wastewater Treatment Committee**

#### Goal

To develop a shared strategy through a collaborative process to protect public health and water quality related to the management of on-site wastewater treatment systems in western Montana.

#### Objectives

- Increase public knowledge
- Identify knowledge gaps, needs, barriers
- Explore options for improving management
- Identify emerging solutions and compliance mechanisms
- Develop recommendations
- Encourage WMCC to provide public forums on committee findings and recommendations

- Flathead Lake Biological Station
- Confederated Salish and Kootenai Tribes (CSKT)
- Midwest Assistance Program (MAP)
- Northwest Montana Association of Realtors (NMAR)
- Lake County Conservation District
- Flathead County Conservation District
- Whitefish Lake Institute
- Montanan Bureau of Mines and Geology
- Flathead Electric Cooperative
- $\circ$   $\,$  Missoula Water Quality District  $\,$
- $\circ$  Friends of Lake Mary Ronan
- o Daily Interlake
- Flathead Lakers
- o DEQ
- o **EPA**
- Lewis and Clark County Sanitarian
- $\circ$  A-1 Sanitation
- Private citizens





# Columbia River Basin Toxics Reduction Funding

### Community Research & Education

ERS

**Clearly Connected** 

Stormwater Toxics Reduction Septic Leachate Toxics Reduction





### MONTANA WATERS Clearly Connected.

Expand public knowledge and awareness of water quality issues

Increase coordination with watershed partners by enhancing partnership opportunities

Inspire residents and visitors to take pride and responsibility in conservation efforts

Encourage individual and societal behavior change

Together, we can keep our waters clean, clear, and connected.







### **Community Research and Education**

- Seeking a team of social science researchers to design & implement social marketing research related to septic leachate and stormwater pollution reduction behaviors
- Seeking a communications/marketing firm to develop an outreach strategy to bolster the Montana Waters: Clearly Connected campaign informed by the community research





# WMCC's Stormwater & Septic Leachate **Toxics Reduction Competitive Grant** Programs

# **Applications are OPEN!!!**

https://westernmtwaters .com/our-work-andprojects/grantsresources/ Applications launched on the DNRC Submittable Platform 1/15/2025 and will be open on a rolling basis until all grant funds are expended!







# **Application Review**

1<sup>s⊤</sup> Review Started March 6th

# Application

Review & Ranking

Award



#### \$2.2 Million

#### Showcase Green Stormwater Infrastructure

Projects designed to mitigate pollution and reduce runoff while highlighting co-benefits.

	Residential Septic System Education and Maintenance
500,000	Develop or expand residential septic maintenance programs that
	provide cost-share, outreach, and programming on water quality.

#### Community Green Stormwater Infrastructure

Regional GSI program development such as rain gardens or rain barrel programs.

#### \$240,000

\$245,000

#### Wastewater Connectivity Upgrades

Projects that benefit local water quality by replacing septic systems or connecting to sewer systems.

### EPA Grant Competitive Subawards



### **Residential Septic System Education & Maintenance**



**Purpose:** To develop or expand residential septic maintenance programs that provide cost-shares and outreach and programming on water quality impacts

#### **Example Projects**

Education & Outreach Programs that include:

- Pumping existing septic tanks
- Existing septic system inspections
- Assistance for other septic tank maintenance
- Program material development, printing, and advertising
- Homeowner Septic Planning Programs

Community or professional conferences or workshops on septic-related education or other technical training and support.

Maximum award is \$50,000 with 25% match requirement



# **Community Connectivity** \$238,000

**Purpose:** To support projects that benefit local water quality by replacing septic systems or connecting to sewer services

#### **Example Projects**

- Resident-owned communities' hookups or upgrades
- Planning & design for hookups in small communities
- Connections to sewer districts or municipal sewer and associated fees
- Residential cost share for upgrading aging or failing septic system components (all county health department permits must be obtained before funds will be released)

Maximum award is \$80,000 with 25% match requirement



# **Showcase GSI Projects**



**Purpose:** To create GSI projects designed to mitigate pollutionandreduce runoff while showcasing co-benefits

#### **Example Projects**

- Stormwater Parks
- Constructed Wetlands
- Bioretention & Bioswales
- Stormwater Schoolyards
- □ ...and MORE

#### **Potential Co-benefits**

- Nature-based recreation opportunities
  - Trails/walking paths
  - Community gathering space
  - Wildlife viewing
- Native plants
- Public engagement
- Educational opportunities

#### Maximum award is \$1.1 M with 25% match requirement



### **Residential & Community Green Stormwater Infrastructure (GSI)**

# \$245,000

**Purpose:** To support the development of community GSI programs

#### Example Programs May Include

- Rain barrels
- Greening alleyways
- Open spaces with native plants
- Rain gardens/bioretention cells
- Wetlands near residential properties
- □ Native riparian areas
- Wetlands or greening steep hillsides

- Permeable pavements
- □ Bioswales
- Planter boxes
- Green roofs
- □ Green parking
- □ Urban tree canopies
  - Downspout rerouting

#### Maximum award is \$50,000 with 25% match requirement



# **MACD Grants USA Training Opportunities**

#### **Grants USA Statewide Trainings**

- Virtual Grant Management (50-person cap)
  - April 2025
  - Spring 2026 (for new employees or people who missed the first one)
- 1-on-1 Grant Application Coaching
  - 2 hours per applicant for one-on-one review of applications







## **UP NEXT**

Website

Email

westernmtwaters.com



### First Round Review has started!

Second Round Review Info to Come

DNRCARDDWMCC@mt.gov

# Questions



# Thank you!

### Contact Grant Staff:



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**Kelly Hendrix** 



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