

W²ASACT

WATER, WASTEWATER AND SOLID WASTE ACTION COORDINATING TEAM GREAT FALLS FUNDING WORKSHOP

HERITAGE INN
1700 FOX FARM ROAD
GREAT FALLS, MONTANA
MARCH 20, 2024

AGENDA

- | | |
|-------|--|
| 8:15 | Introduction & Welcome |
| 8:30 | Technical assistance providers: Midwest Assistance Program,
MT Rural Water |
| 8:45 | USDA Rural Development Loans & Grants |
| 9:05 | DNRC Renewable Resource Grants & Loans |
| 9:20 | Montana INTERCAP Loan Program, Montana Board Of Investments |
| 9:45 | American Rescue Plan Act (ARPA) Water and Sewer Grants Update |
| 10:00 | Break |
| 10:15 | DEQ Drinking Water State Revolving Fund Loans & Wastewater State Revolving
Fund Loans |
| 10:35 | DEQ Lead in Schools & Emerging Contaminants Funding |
| 10:50 | Infrastructure Funding - Montana Legislature & Congress |
| 11:10 | Department Of Commerce Community Development Programs |
| 11:30 | Build America Buy America (BABA) Funding Agency Coordination |
| 11:50 | Questions and comments |
| 12:15 | Adjourn |

FUNDING AGENCIES AND RESOURCE TEAMS WILL BE AVAILABLE FOR PROJECT CONSULTATIONS

VISIT AGENCY BOOTHS MORE INFORMATION
dnrc.mt.gov/Conservation/Conservation-Programs/WASACT/

2024 W2ASACT Spring Workshop

Water, Wastewater and Solid Waste Action Coordinating Team



Montana Rural Water Systems, Inc.





Montana Rural Water Systems

“MRWS” – 44 Years!






MRWS Provides:



- **Technical Assistance** to water & wastewater specialists & utility clerks and bookkeepers
- **Class Room & 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






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 (New Operators & for CECs)





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



Montana Rural Water Systems, Inc.

City of Malta – Security

April 2010



Montana Rural Water Systems, Inc.



Yellowstone River Flooding City of Red Lodge June 2022





MRWS Staff



- Water Circuit Riders (3) – Dennis, Leo & Bobbie
- Wastewater Technician (1) – Ingrid
- *Wastewater Decentralized (1) - Bill*
- MRWS Training Specialist/TA Provider (1) – Julie
- EPA Water TA / Training (1) - Robin
- Source Water Program (2) – Kristi & Kyla
- Apprenticeship Program (1) – Lynora
- EPA WW Decentralized & Small System Assistance (1) - Lynora
- Technical Assistance / Trainer (1) – Roger
- EFC Technical Assistance (1) – Nikki
- EPA Wastewater Tribal TA (1) - Kurtis
- Office Manager (1) – Tanya





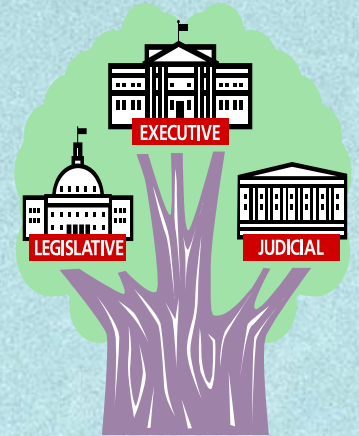
MRWS Funding

- 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?

- ✓ **USDA/Rural Development**
- ✓ **DEQ & EPA**
- ✓ **State Funding Agencies**
- ✓ **Suppliers**
- ✓ **Engineers and Consultants**
- ✓ **Most Importantly – MT Water & Wastewater Utilities**



Funding Agencies in MT



MT Dept. of Commerce

- ☐ Community Development Block Grant Program &
- ☐ Montana Coal Endowment Program

MT Dept. of Environmental Quality



- ☐ 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 Utilities!





2024 Theme

Partners for Growth...

Investing in Our Future!

Water, Wastewater and Solid Waste Action Coordinating Team



Montana Rural Water Systems
Technical Conference and Exhibition Show
March 20 – 22, 2024 / Heritage Inn / Great Falls, MT

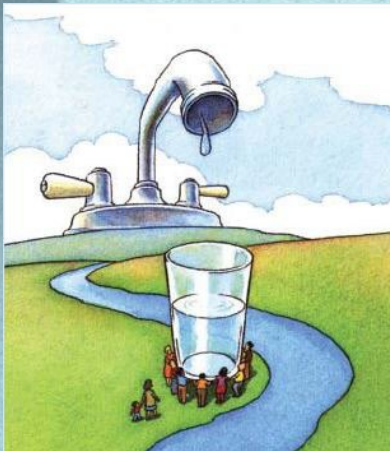
Montana Rural Water Systems, Inc.





Call on....

Montana Rural Water Systems
with your Onsite
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

Montana Rural Water Systems, Inc.





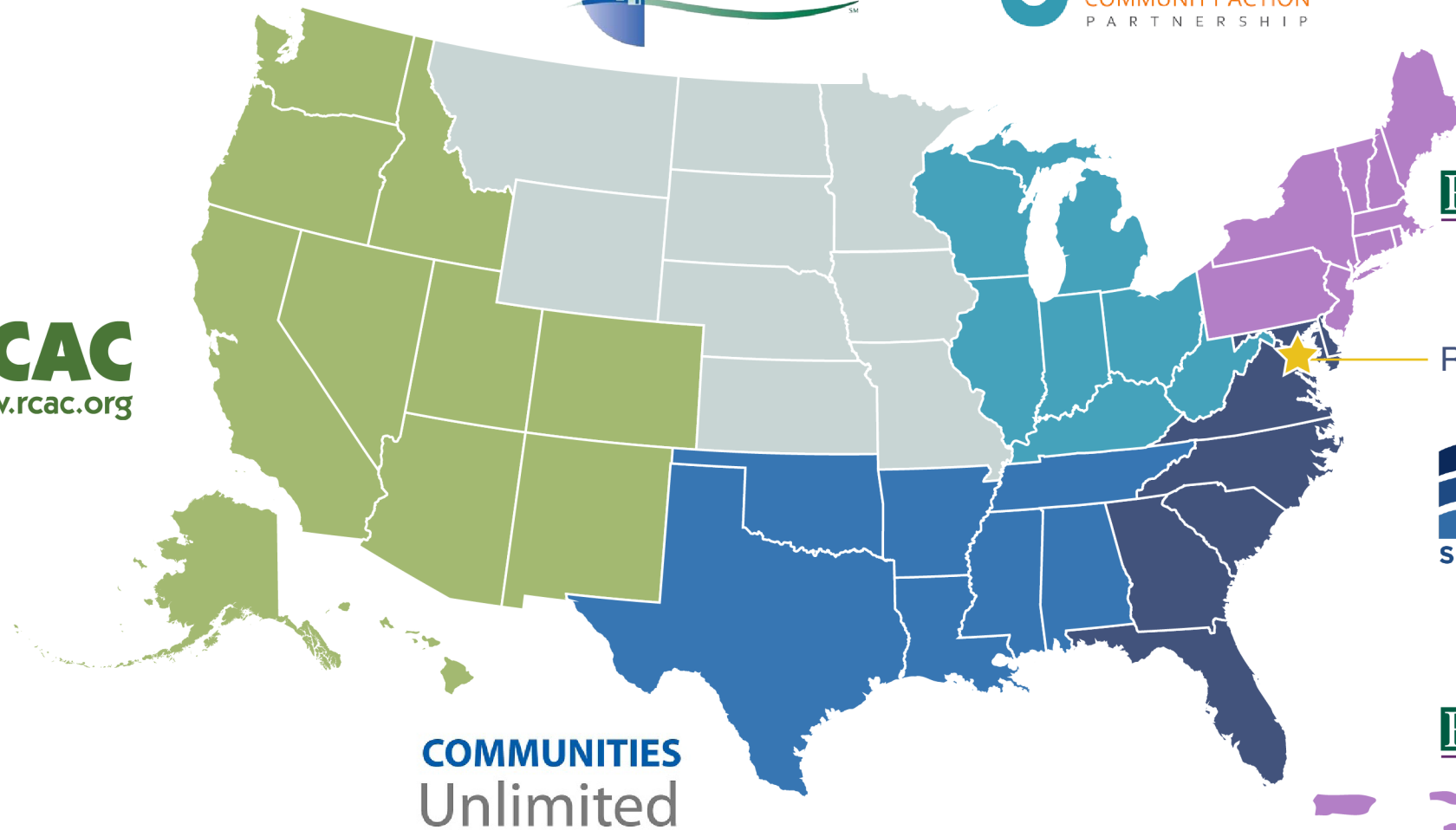
Rural
Community
Assistance
Partnership



Midwest Assistance Program (MAP)



Rural Community Assistance Partnership



RCAP National Office



COMMUNITIES
Unlimited

Who We Are



Steve Shope
(406) 570-5293
TA Provider



Lance Goodman
(307) 247-0760
TA Provider



Will Meyer
(406) 830-6105
TA Provider

Tim Hardesty
(406) 223-6613
TA Provider



Chad Thompson
(619) 387-6344
TA Provider



Devin Beal
(406) 290-3325
Field Manager

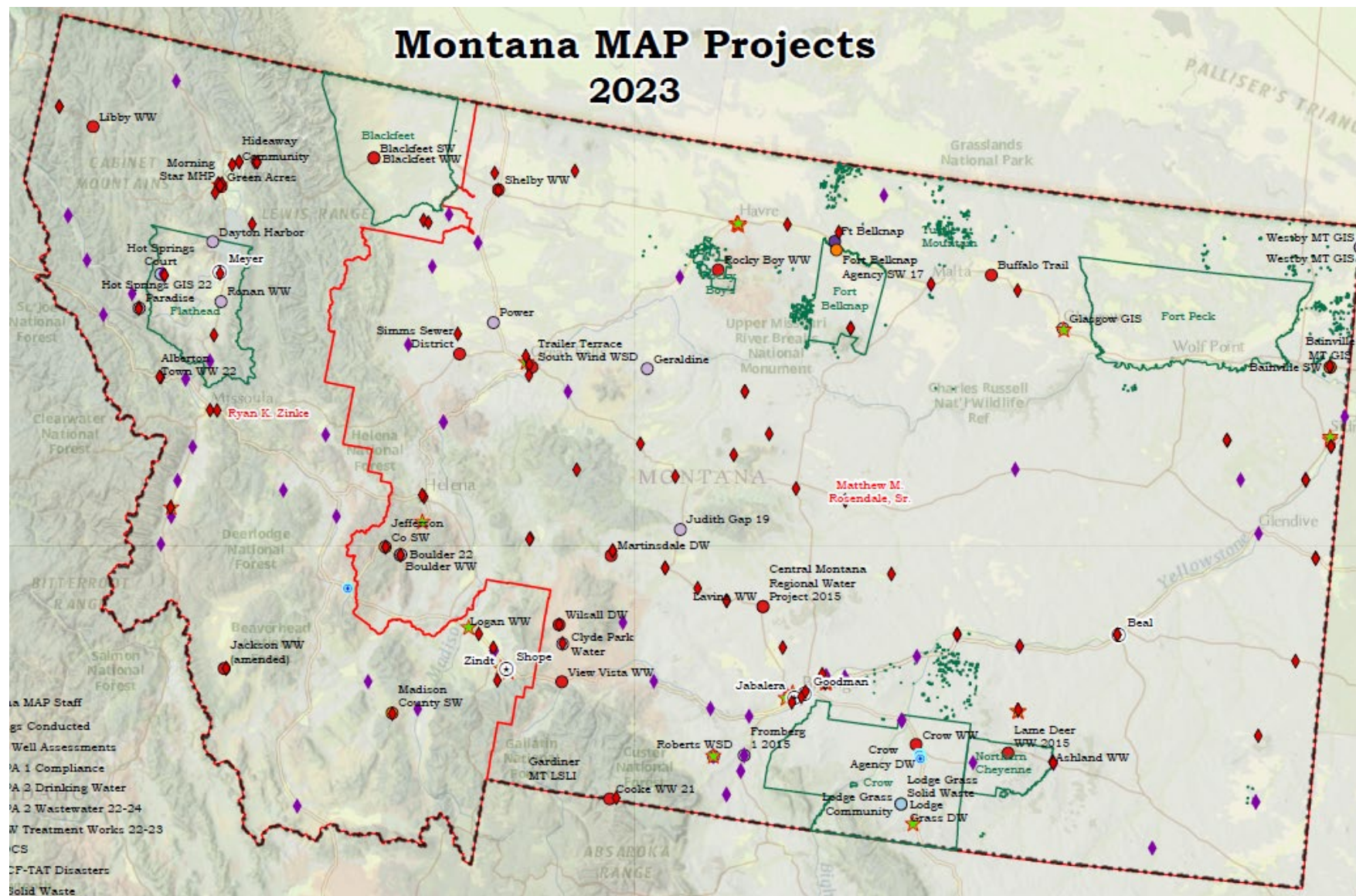


What We Do

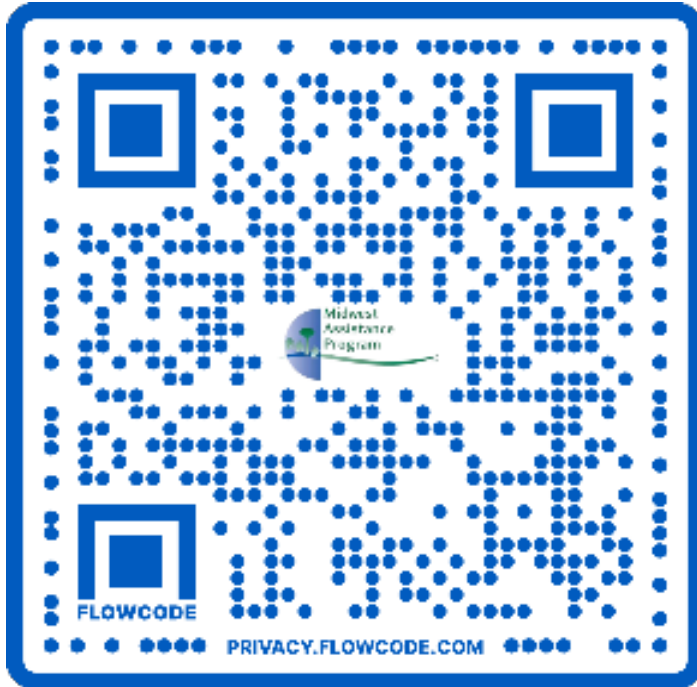
- No-cost technical assistance
 - Water
 - Wastewater
 - Stormwater
 - Solid Waste
 - Utilities serving less than 10,000 people
- No-cost Training for operators, clerks and board members



Where We Work



Contact Us



Map-inc.org

Devin Beal
dbeal@map-inc.org
(406) 290-3325



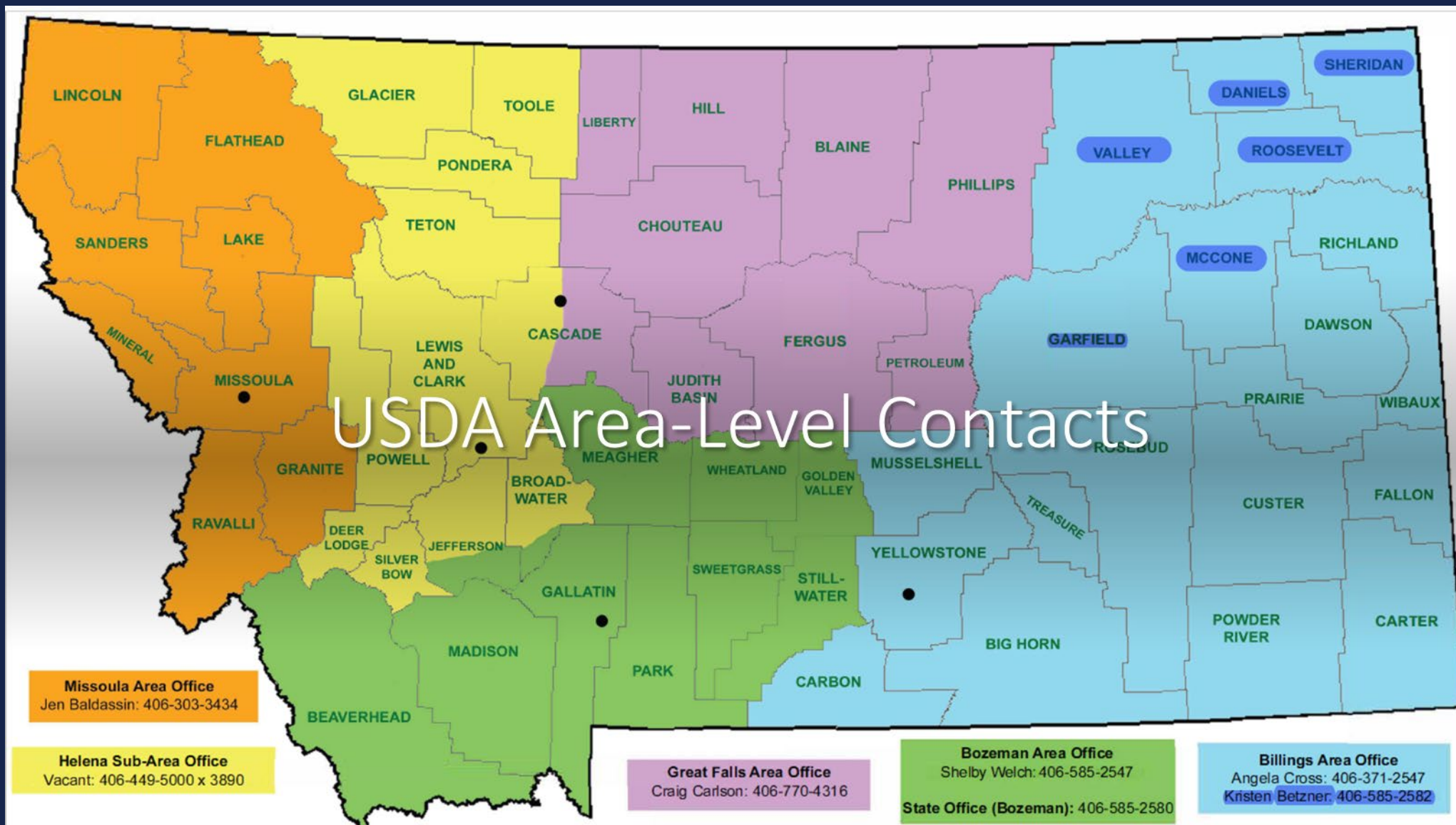


2024 Montana Rural Water

March 20, 2024



USDA Rural Development
U.S. DEPARTMENT OF AGRICULTURE



Application Data

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

Application Data

- PER – 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 should first be 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

Application Data PER Flow Data

UTILITY BILLING SYSTEM Report ID: 1148

BILLING CALCULATION PROOF

For Year 2022 Ordered by Account, METERED From 000-00 to V-262-04

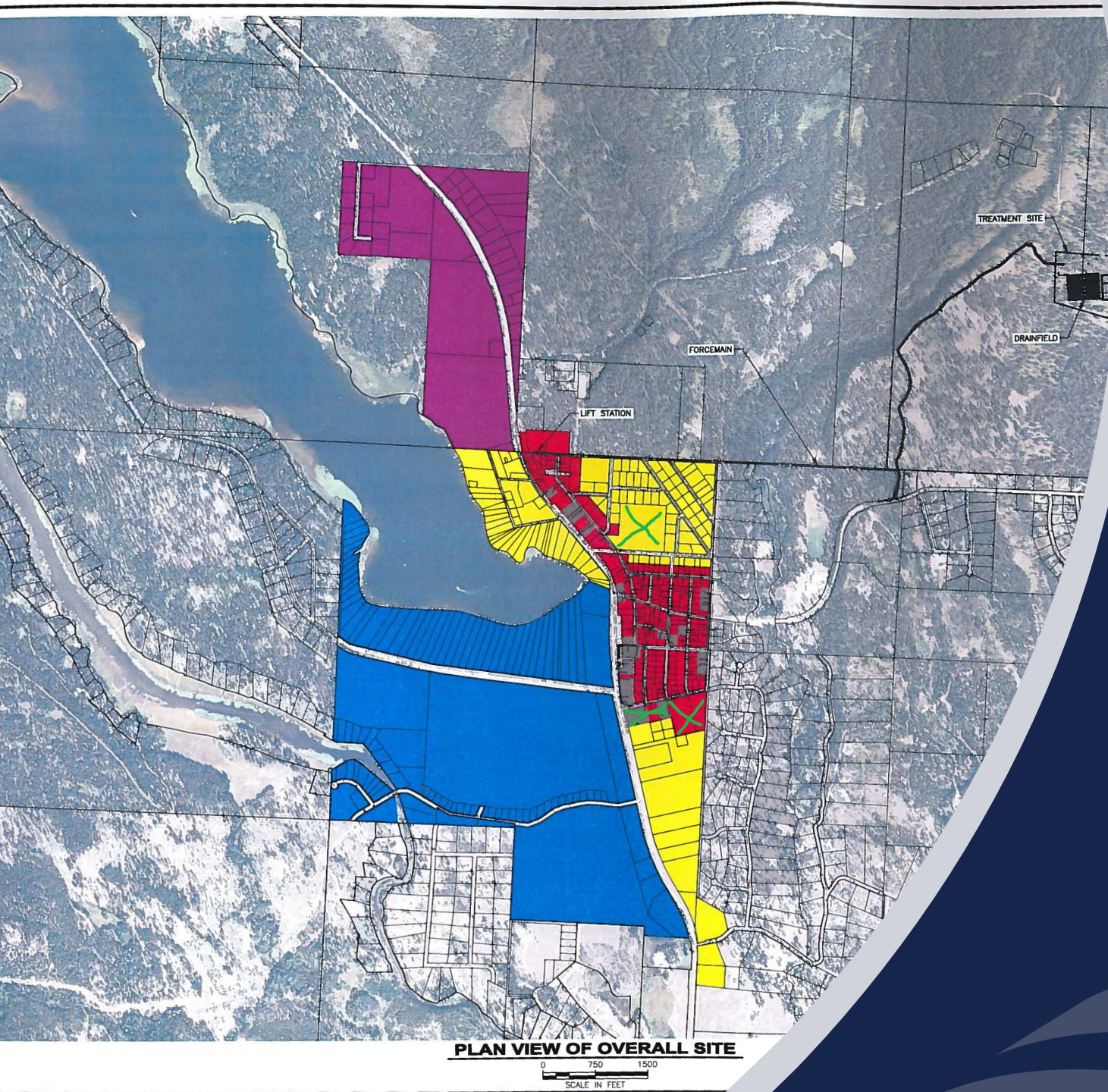
Page 1

User Type	Service	Amount	USERS	Usage
COMM	COMMERCIAL			
	WATER	14602.07	30	1528120
	SEWER	19327.83		
	WATER PENALTY	542.13		
	SEWER PENALTY	801.15		
	SUMP PUMPS	420.00		
	Total for COMM COMMERCIAL	35693.18		1528120
CSED	C-SERVICE-EDUCATIONAL			
	WATER	18884.46	4	7749440
	SEWER	19772.77		
	SUMP PUMPS	120.00		
	Total for CSED C-SERVICE-EDUCATIONAL	38777.23		7749440
RESI	RESIDENTIAL			
	WATER	122551.23	239	30462497
	SEWER	142307.66		
	WATER PENALTY	3090.03		
	SEWER PENALTY	5200.18		
	SUMP PUMPS	2715.00		
	Total for RESI RESIDENTIAL	275864.10		30462497
	Grand Totals:	350334.51		39740057

1-22 to 12-31-22

ER –Environmental Report

- Complete area of potential effect.
- Contact made with all the required parties.
- The TDAT (HUD Website) for the Section 106 data @ <https://egis.hud.gov/TDAT/> Data for Yellowstone County needs to be pulled using a site address.



ER – Environmental Report

Area of Potential Affect (APE) map

RD APPLY <https://www.rd.usda.gov/programs-services/rd-apply>

[RD Home](#) [Newsroom](#) [Contact Us](#) [Help](#)



[Home](#) [Notifications](#) [Admin](#) [Reports](#) [Tutorials](#)

Application Id: 4022471 | Borrower Name: Town of Bunker Hill | [»](#)

You are logged in as: BETZNER, KRISTEN | [Logout](#)

[Interview](#) [Customer](#) [Import Engineering Data](#) [Facilities](#) [Volume/Flow](#) [Project Schedule](#) [Project Cost](#) [Financial](#) [Service Area\(s\)](#) [Documents](#) [Summary/Submit](#)

RD APPLY <https://www.rd.usda.gov/programs-services/rd-apply>

Need to get your eAuth ID (Level 2)

Go to website:

<https://rdapply.usda.gov>

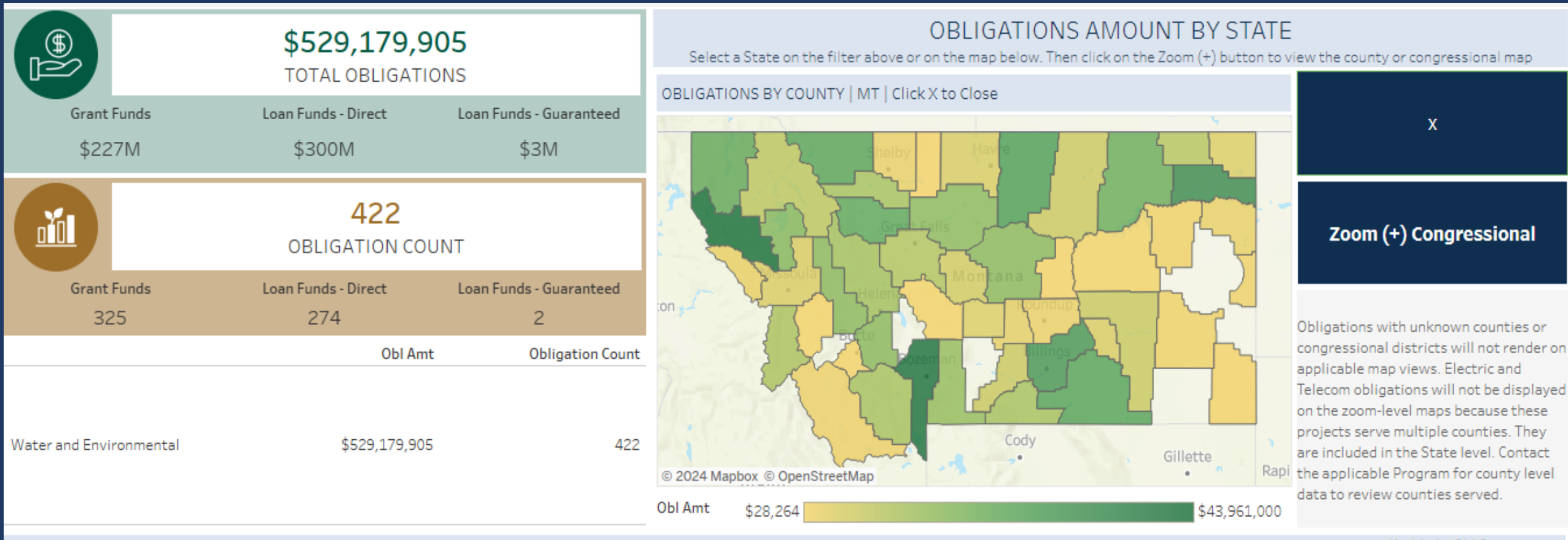
Click on Register

Click on Level 2 Access

Answer the questions **- keep your login and password**

We can help you through this process

Obligations to date





Rural Development Water and Environmental Programs Performance Dashboard

Disclaimer: Dashboards are designed to report program-specific performance and should never be used as a Rural Development financial report of record.

State: MONTANA

FY(s) Awarded: 2023 to 2023

As of Year and Month: Oct 2023



Awarded, \$ Amt and % Funding Split*

\$25.45M

7	Direct Ln Amt	\$9.38M	37%
11	Grant Amt	\$16.06M	63%
0	Guar Ln Amt		0%



Technical Assistance Visits, # Awards and \$ Amt

1,193

0 TAT Grants \$0



and Type of Entities Awarded*

9



Public Body
100%



Projects Awarded*

9

Water	4
Waste	4
Combo	1



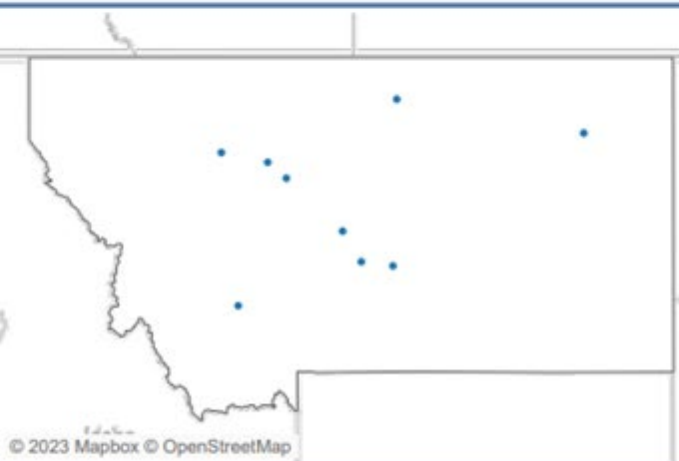
Current Non-Federal Leveraging*

\$15.41M
60.6%

MONTANA

Current # of Counties Awarded*

8



© 2023 Mapbox © OpenStreetMap

Kathleen Williams, State Director
Steve Troendle, Program Director
2229 Boot Hill Court
Bozeman, MT 59715
Phone: (406) 585-2580
www.rd.usda.gov/mt

\$181,664,521

Unpaid Principal as of August 2023

207

Loans

113

Borrowers

Total Delinquencies # & %

0

0.00%

Delinquencies < 1 Yr # & %

0

0.00%

Delinquencies > 1 Yr # & %

0

0.00%

Population Served**

9,625

1,000 or less	29%
1,500 or less	57%
2,500 or less	71%
5,000 or less	100%



Households/Businesses Benefited**

3,565



of New Connections**

71



Miles of Line Repaired/Installed**

9



Health & Sanitary Projects Served**

6



Average Median Household Income Served*

\$35,766



Current Average Monthly Household Water Cost**

\$51.29



Current Average Monthly Household Sewer Cost**

\$51.18

*Technical assistance not included.

** Construction programs only.

Current Data Run Date: October 11, 2023

Water Programs FY 2024 current estimates

Allocation Est based on FY23 \$ 11,970,000 Loan

\$ 3,351,000 Grant

Funded to date	\$ 7,970,000
Application pending	- <u>\$ 2,514,000</u>


Remaining funds	<u>\$ 4,837,000</u>
-----------------	---------------------

Incomplete RD apply applications \$7.66m

RD Funds Pooled April 5, 2024

August 2, 2024

Additional Funding Opportunities

- ECWAG – Emergency Community Water Assistance Grants
 - Persistent Poverty Counties
 - SECD- Strategic Economic and Community Development
 - Section 306 (c) Tribal Grants
 - 1% Interest Loans
- 
- A decorative graphic in the bottom right corner of the slide, featuring a stylized American flag. It includes several white stars of varying sizes on a dark blue background, with wavy lines below them representing the stripes of the flag.

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

GLACIER COUNTY,

GOLDEN VALLEY COUNTY



Strategic Economic and Community Development

SECD supports projects that promote and implement strategic community investment plans. These plans use the unique strengths of rural communities to advance prosperity. USDA Rural Development helps finance these projects to build community prosperity by using community assets, identifying resources, convening partners and leveraging federal, state, local or private funding.



- 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.

Maximum Grant = \$4,000,000

- # MT Distressed Communities



No High School Diploma

Percent of the 25-year-old+ population without a high school diploma or equivalent



Housing Vacancy Rate

Percent of habitable housing that is unoccupied, excluding properties that are for seasonal, recreational, or occasional use



Adults Not Working

Percent of the prime-age (25-54) population not currently employed



Poverty Rate

Percent of the population living under the poverty line



Median Income Ratio

Median household income as a percent of metro area median household income (or state, for non-metro areas)



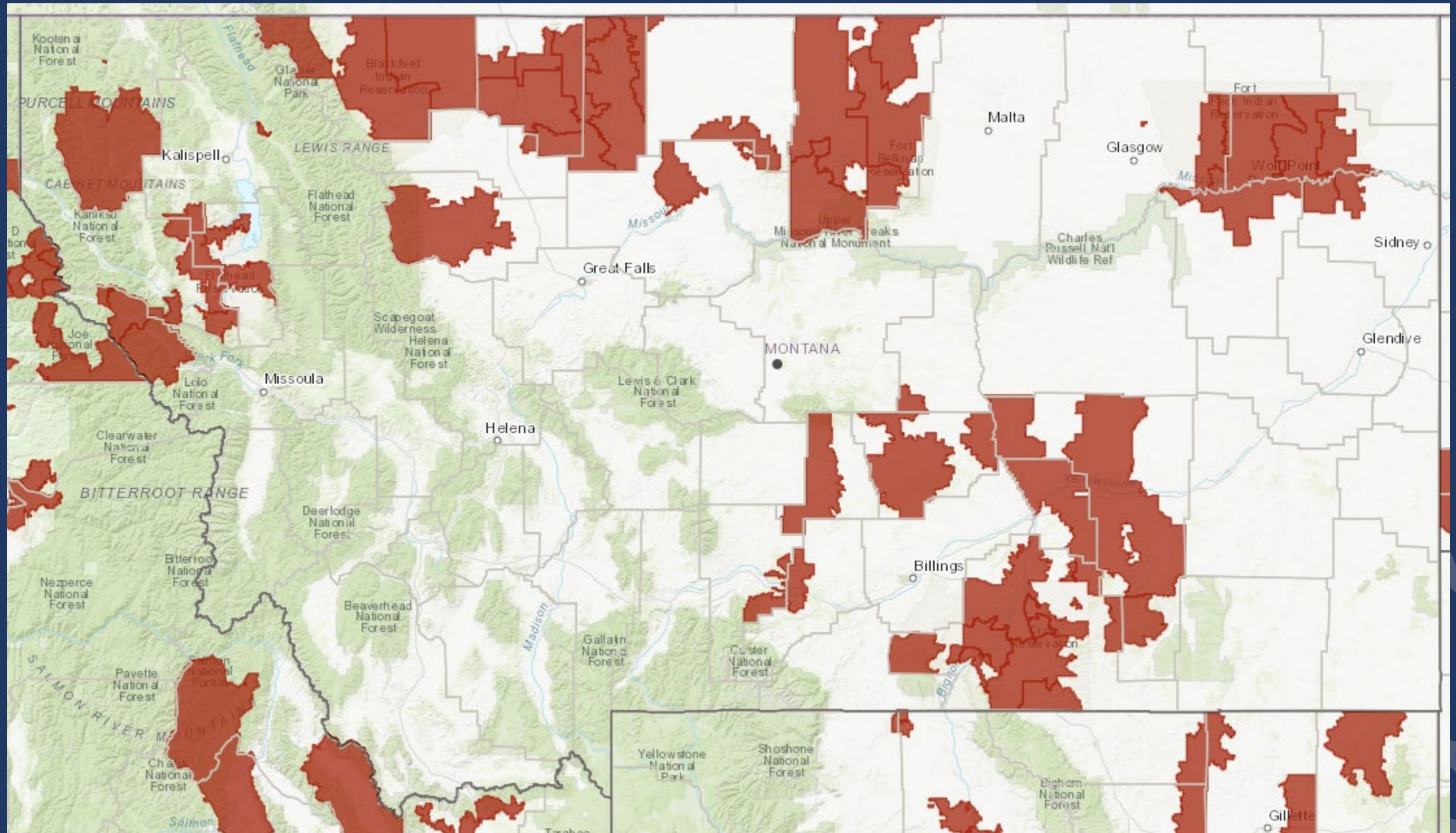
Change in Employment

Percent change in the number of jobs from 2016 to 2020



Change in Establishments

Percent change in the number of business establishments from 2016 to 2020



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.

Zipcode	City
59022	Crow Agency
59034	Hardin
59038	Hysham
59043	Lame Deer
59050	Lodge Grass
59069	Reed Point
59072	Roundup
59201	Wolf Point
59213	Brockton
59225	Frazer
59255	Poplar
59327	Forsyth
59417	Browning
59422	Choteau
59427	Cut Bank
59474	Shelby
59521	Box Elder
59522	Chester
59523	Chinook
59526	Harlem
59527	Hays
59845	Hot Springs
59855	Pablo
59864	Ronan
59866	Saint Regis
59872	Superior
59923	Libby

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.



MT Disaster Counties - 2022

FLATHEAD

PARK

SWEETGRASS

STILLWATER

CARBON

YELLOWSTONE

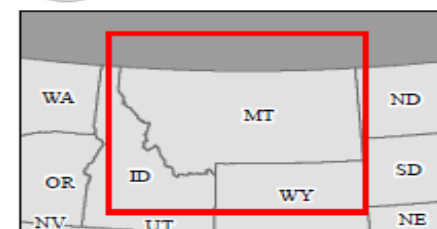
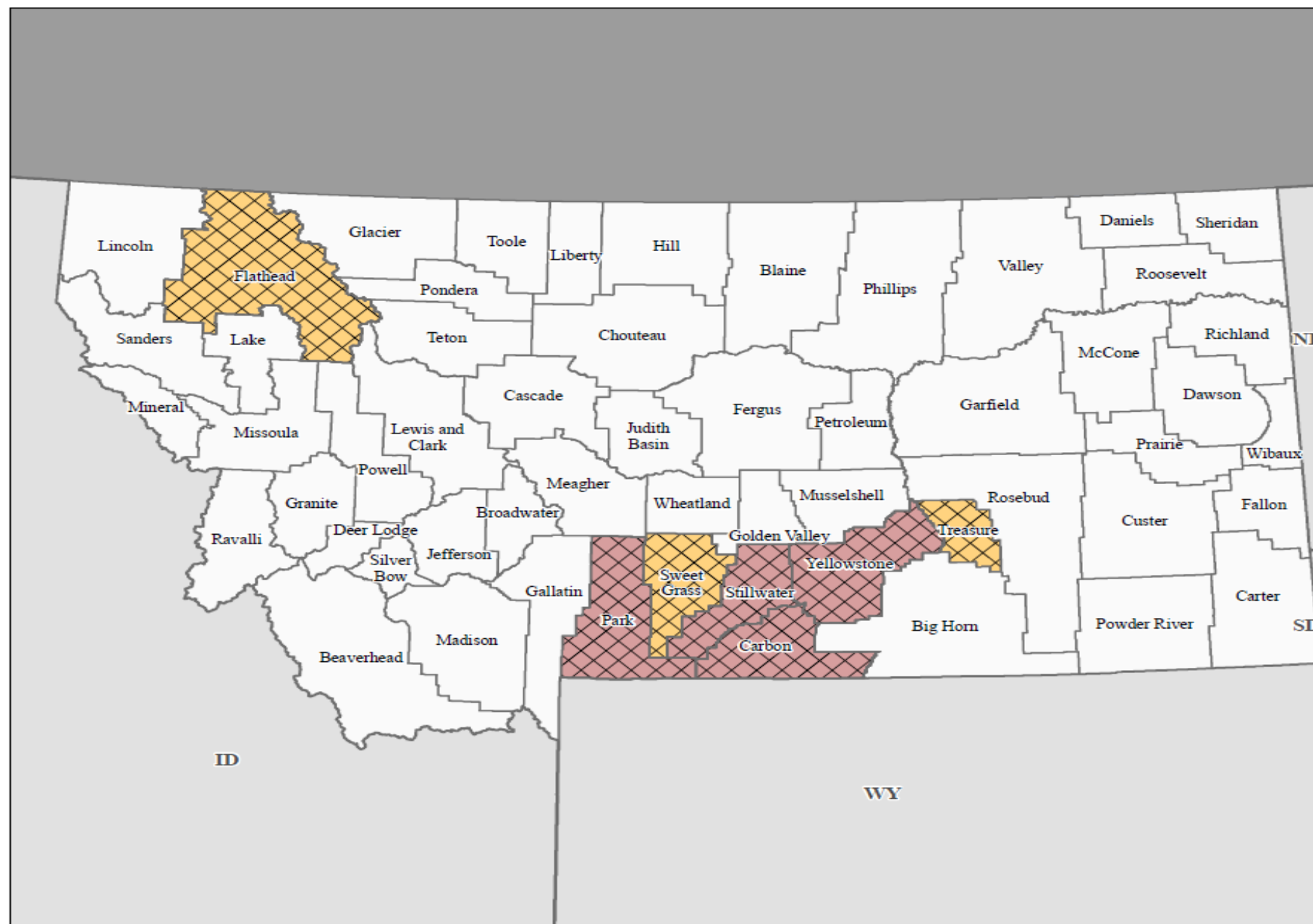
TREASURE



FEMA-4655-DR, Montana Disaster Declaration as of 07/22/2022



FEMA



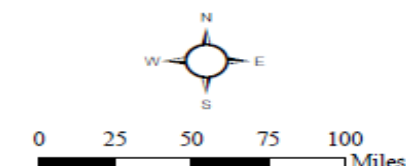
Data Layer/Map Description:
The types of assistance that have been designated for selected areas in the State of Montana.

All areas in the State of Montana are eligible for assistance under the Hazard Mitigation Grant Program.

Additional designations may be made at a later date if requested by the state and warranted by the results of further damage assessments.

Designated Counties

- No Designation
- Individual Assistance and Public Assistance (Categories A - G)
- Public Assistance (Categories A - G)



Data Sources:
FEMA, ESRI;
Initial Declaration: 06/16/2022
Disaster Federal Registry Notice:
Amendment #4: 07/22/2022
Datum: North American 1983
Projection: Lambert Conformal Conic

MT Disaster Counties

- Application window is open until funds are exhausted
- 75% Maximum Grant.
- Infrastructure damage by the flood not repaired by FEMA or Insurance.
- Can include improvements not eligible for FEMA.
- Let our staff know if you have a project.



Questions





Renewable Resource Grant and Loan Program

WASACT Funding Workshop
March 20, 2024



2024 = GROWTH



The Montana Legislature established RRGL Program to fund conservation, management, development and preservation of Montana's renewable resources.

The RRGL grant and loan funding for public facility and other renewable resource projects.



Public Facility Projects



Non-Public Facility Projects

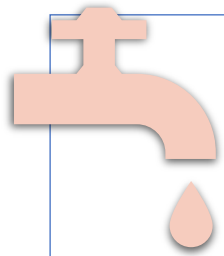


Project Eligibility

Grants or loans may fund the following:

Feasibility, design, research, and resource assessment studies
Preparation of construction, rehabilitation, or production plans
Construction, rehabilitation, production, education, or other implementation efforts.

Renewable Resource Grants - Examples

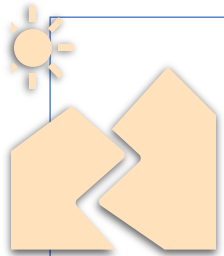


Infrastructure

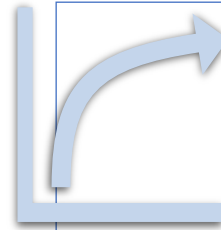
- Drinking Water
- Wastewater
- Stormwater



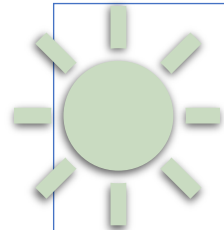
Irrigation



Restoration



Studies



Renewable Energy



Renewable Resource Grants for Infrastructure



RRG Project Grants

Local Governments

\$125,000

Match is not required

Applications due May 15, 2025



RRG Planning Grants

Local Governments

Infrastructure PER \$40,000

Technical Narrative \$30,000

PER Update \$20,000

Resource Plans or Studies \$15,000

December 2023 – April 2024

September 2024 – December 2024



Technical Assistance

Local Governments

\$3,000

Open Cycle





Renewable Resource Project Grant Application

Project Summary
and Abstract

Resource and
Citizen Benefits




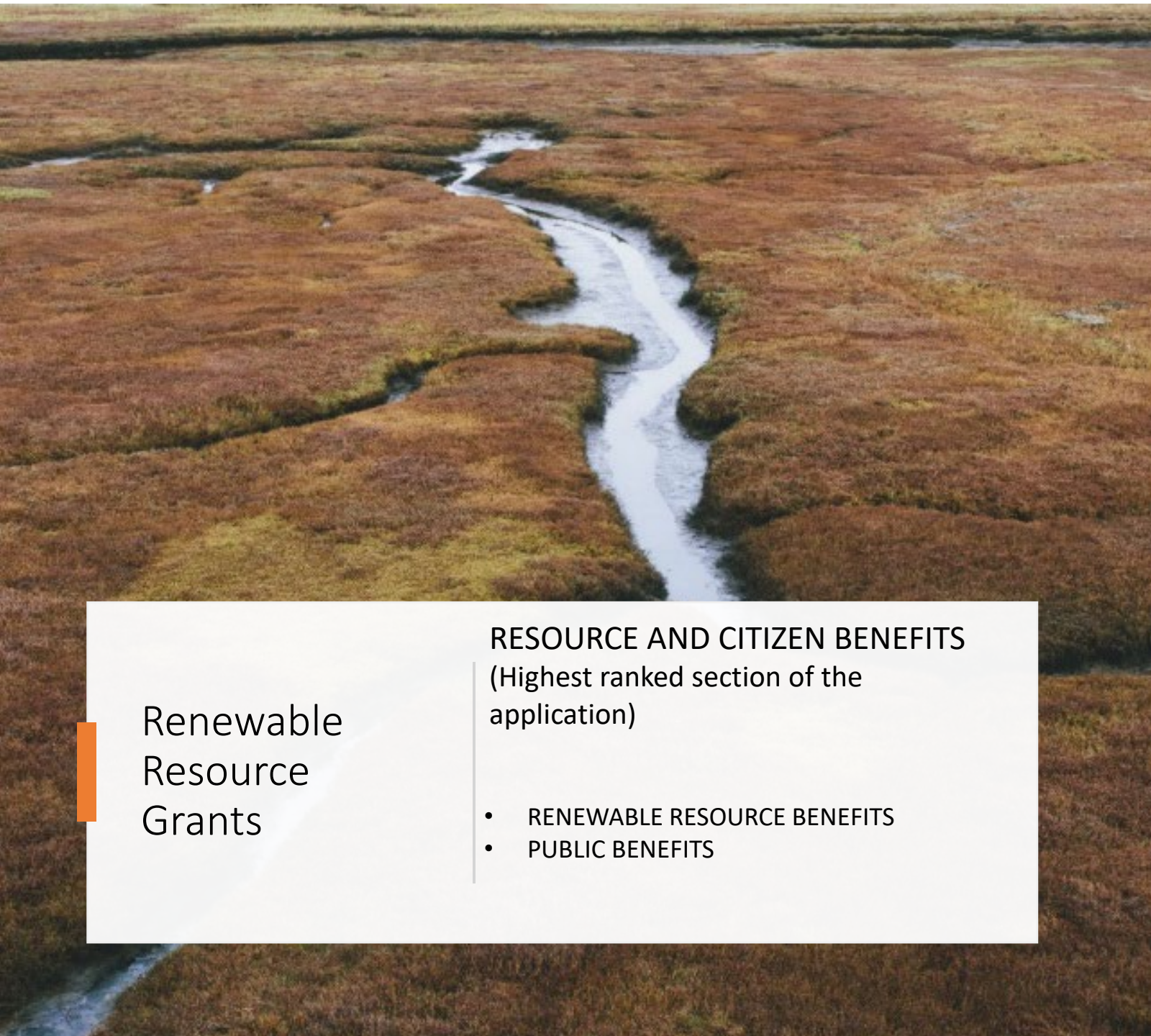
Technical
Presentation/
Preliminary
Engineering Report

Project
Management Plan

Financial
Presentation

Environmental
Evaluation





Renewable Resource Grants

RESOURCE AND CITIZEN BENEFITS (Highest ranked section of the application)

- RENEWABLE RESOURCE BENEFITS
- PUBLIC BENEFITS



RRG PROGRAM PURPOSE

To enhance Montana's renewable resources through projects that *measurably conserve, develop, manage, or preserve resources.*

CONSERVE - promote the efficient or sustainable use of a resource.

MANAGE - improve the ability to control or administer a resource.

DEVELOP - develop a new beneficial and sustainable use of a resource.

PRESERVE - protect a resource from pollution, destruction, or neglect.



What are RENEWABLE RESOURCES?

Sustainable natural resources:

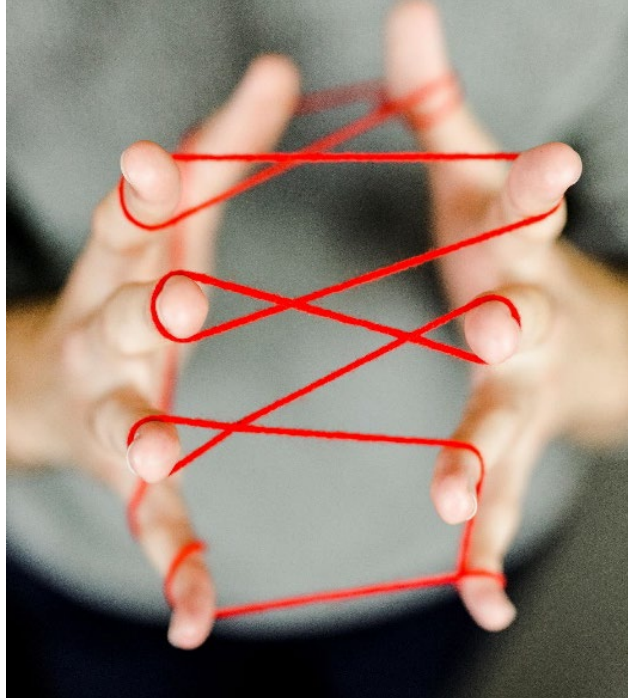
WATER | WIND | RENEWABLE
ENERGY | SOIL | WETLANDS |
CROP LAND | FISH AND AQUATIC
HABITAT | WILDLIFE HABITAT |
RANGE LAND | FORESTS



What are PUBLIC BENEFITS?

A benefit that accrues to:
COMMON WELL-BEING
HUMAN HEALTH OR SAFETY
WELFARE (ECONOMY)
RECREATION





Renewable Resource Grants

CRITERIA: TECHNICAL FEASIBILITY

- Project Description
- Alternatives Assessment
- Cost Estimate
- Schedule
- Feasibility
- Supporting data
- *Uniform Application Compliance*



Renewable Resource Grants

CRITERIA: PROJECT MANAGEMENT

- Adequate staff and management
- Financial and contract management capacity
- Agency coordination
- Public involvement
- Satisfactory past performance



Renewable Resource Grants

CRITERIA: FINANCIAL FEASIBILITY

- Complete Budget
- Realistic Funding Options
- Demonstrate Affordability



Renewable Resource Grants

CRITERIA: ENVIRONMENTAL EVALUATION

- Minimize Adverse Environmental Impacts
- Identify Mitigation Measures



Renewable Resource Project Grants – HOW TO APPLY?



Submit Online:

www.grants.drnc.mt.gov



Submit by Mail:

One original authorizing statement.

One unbound original application and supporting materials.

\$250.00 application fee



Other DNRC Grants

Emergency Grants

- Up to \$30,000 for urgent unanticipated need and RRGL eligible.

Private Grants

- Available to individuals and associations

Reclamation and Development Grants

- Up to \$500,000 for projects damaged by resource extraction activities or hazardous materials.
- PLANNING AVAILABLE NOW – Due 3/21/2024 up to \$75,000





RRGL Program Contacts

RRGL
Program
Manager

Lindsay Volpe

444-9766

lmvolpe@mt.gov

RRGL
Grants

Sonja Hoeglund

444-0552

shoeglund@mt.gov

RRGL Grants

Ann Kulczyk-
Glasgow

228-4129

akulczyk@mt.gov

RRGL Grants

Melissa Downing

444-0697

Melissa Downing@
mt.gov

Bureau
Chief

Autumn Coleman

444-6687

Autumn.coleman@
mt.gov

Engineer

David Larson

444-2951

dclarson@mt.gov

WASACT Workshop 2024



MONTANA
BOARD OF INVESTMENTS
I N T E R C A P

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

An aerial photograph of a mountainous landscape. In the foreground, a dense forest of evergreen trees covers a hillside. A winding road or path cuts through the forest. In the middle ground, a large, calm lake is visible, surrounded by green fields and more forest. In the background, a range of mountains with snow-capped peaks stretches across the horizon under a blue sky with scattered clouds.

Program Basics

- Low-interest loan program
- Variable interest rate
 - New rates are effective every February 16
 - Average rate over the last 15 years: 2.41%
 - Current rate: 5.75% (6.25% existing, no autopay)
- Loan term is either
 - Statutory limit,
 - Fifteen years, OR
 - Useful life of project, whichever is less

Team Montana

- Since 2022:
 - Annual bond issue/remarketing cost paid by borrower Loan Rate ELIMINATED.
 - 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.
- This year's 5.75% Loan Rate (5.049% Bond Rate to STIP + 0.701% program operating spread).
 - Additional 0.50% handling fee will be added for 6.25% total loan rate to process existing loans not set up for autopay.

Short-Term Investment Pool (STIP)

- Created by the Legislature in 1973 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.
- More detail: www.investmentmt.com

Loan Servicing

- INTERCAP Application
 - A short fillable form the Borrower can submit securely online.
- 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.** Borrowers with existing loans currently submitting check or initiating ach/wire to make payments will receive a **0.50% reduction on the 6.25% loan rate to 5.75% by switching to autopay.**
- No Vehicle/Equipment Liens required

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

Straightforward Application

- 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 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 5.75%* - February 16, 2024 through February 15, 2025

***Existing loans not setup in autopay will have a 6.25% rate.**

[Application](#)

[File Upload](#)

[Payment Calculator](#)

[Brochure](#)

[Rate History](#)

[ACH Form](#)

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.

- ☑ 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.



Questions?

www.investmentmt.gov
406-444-0001

Louise Welsh
Sr. Bond Program Officer
Lwelsh@mt.gov

Peggy Saarela
Credit Analyst
Peggy.Saarela@mt.gov

MONTANA

BOARD OF INVESTMENTS

I N T E R C A P

2401 COLONIAL DRIVE, 3rd FLOOR, HELENA, MT 59601
P.O. BOX 200126, HELENA, MT 59620-0126
406-444-0001 | INVESTMENTMT.COM

Supplemental Checklist ☒

Source of Repayment

General Fund (general promise to pay)

The application will be reviewed with the:

- ☐ Fiscal Year 2022 audited financial report*
- ☐ Fiscal Year 2023 audited financial report*
- ☐ Fiscal Year 2024 Budget

*If the audited financial reports are unavailable on the state's [Transparency in Local Government](#) website, we will accept a copy of the following:

- ☐ Balance Sheet
- ☐ Statement of Revenues & Expenditures

Enterprise Debt (Water, Wastewater, and Solid Waste)

- **Water & Wastewater (Sewer) Districts**
- **Solid Waste Districts, Cities/Towns & Counties**

1. Water & Wastewater (Sewer) District

→ Debt **must be voted*** and the election process completed according to statute

Please send the following copies with the application:

- ☐ Resolution creating the District
- ☐ Resolution to incur debt
- ☐ Notice of Election
- ☐ Where and when Notice of Election was published and posted
- ☐ Ballot
- ☐ Certified Results

*7-13-2333 Montana Code Annotated (MCA) authorizes revenue or special assessment bonds issued under this section may be authorized by a resolution adopted by the board of directors without need for authorization by the electors.

Please note: The Montana Board of Investments (the "Board") will have the sole discretion whether or not to require the vote of the electors (7-13-2302 MCA-voted deficiency tax levy) as a condition to the loan. The Board's staff will review each loan request on a case-by-case basis.

Enterprise debt continued...

- ☐ Current user fees
- ☐ Fiscal Year 2022
 - Balance Sheet
 - Statement of Revenues & Expenditures
- ☐ Fiscal Year 2023
 - Balance Sheet
 - Statement of Revenues & Expenditures
- ☐ Fiscal Year 2024 Budget

If repayment depends on a rate increase, please send copies of the following:

- ☐ Resolution calling for rate increase
- ☐ Notice of Public Hearing
- ☐ Proof of meeting held

If District has existing outstanding debt* please send a copy of the following:

- ☐ Resolution authorizing the outstanding debt

*Note: Bond Counsel required ensuring new bond is on parity with outstanding debt.

2. Cities/Towns, Counties & Solid Waste

The application will be reviewed with:

- ☐ Fiscal Year 2022 audited financial report*
- ☐ Fiscal Year 2023 audited financial report*
- ☐ Fiscal Year 2024 Budget
- ☐ Current user fees

*If the audited financial reports are unavailable on the state's [Transparency in Local Government](#) website, we will accept a copy of the following:

General Fund

- ☐ Balance Sheet
- ☐ Statement of Revenues & Expenditures

Water and/or Wastewater (Sewer) or Solid Waste Fund

- ☐ Balance Sheet
- ☐ Statement of Revenues & Expenditures

If repayment depends on a rate increase, please send copies of the following:

- ☐ Resolution calling for rate increase
- ☐ Notice of Public Hearing
- ☐ Proof of meeting held

If the City/Town or County has existing outstanding debt* for the water, wastewater or solid waste fund, please send a copy of the following:

- ☐ Resolution authorizing the outstanding debt

*Note: Bond Counsel required ensuring new bond is on parity with outstanding debt.



★ ★ ★
AMERICAN
RESCUE PLAN
ACT 2021
State of Montana



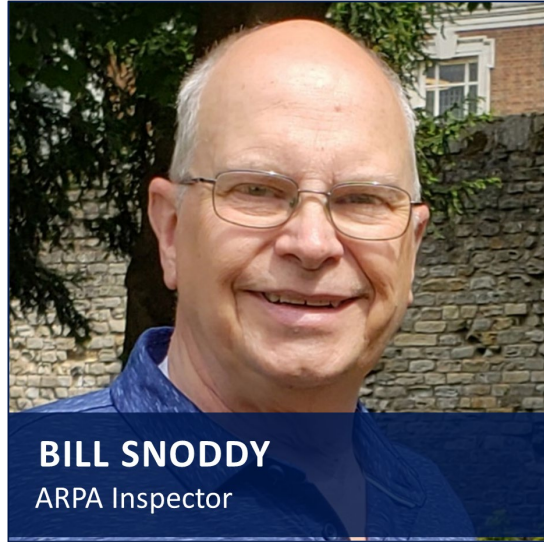
ARPA Program Update

March 2024

DNRC ARPA Grant Management Team



DNRC ARPA Inspectors



ARPA Grant Management



Grant Management
PowerPoint



Contact an ARPA
Grant Manager



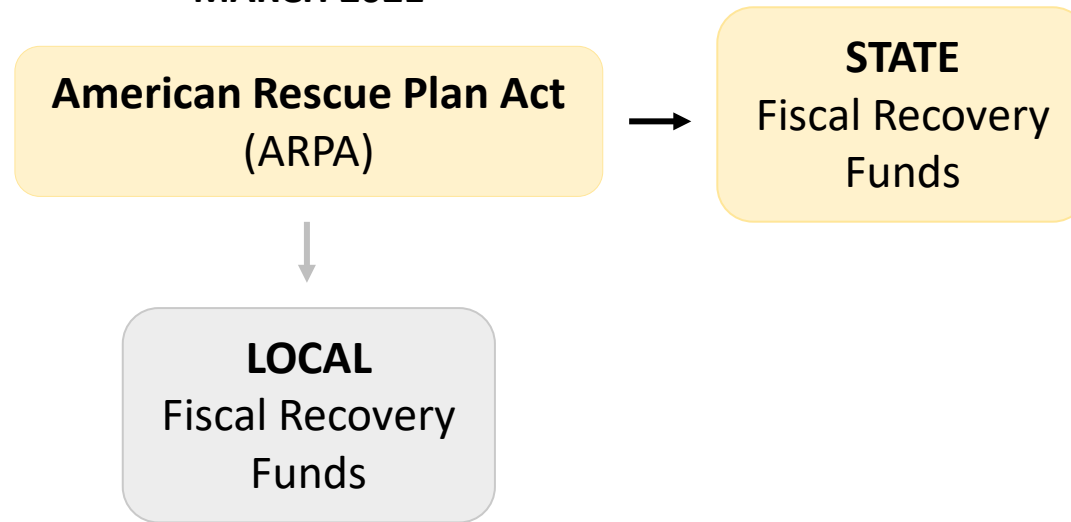
>> Latest ARPA Award Information <<

Subrecipients of ARPA Water & Sewer Infrastructure grant funds are responsible for administering their projects and federal statutory and regulatory requirements. This page and its resources are intended to help DNRC's sub

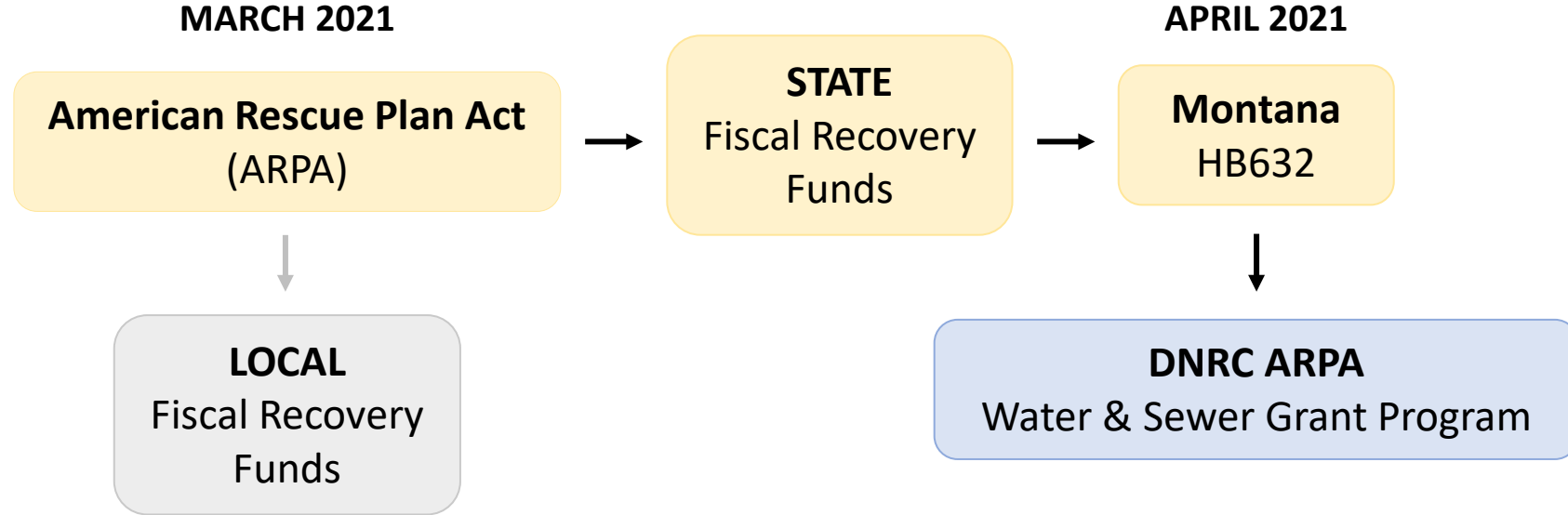
> Start Here - Introduction to ARPA Grant Management

ARPA Water & Sewer Infrastructure Grants Overview

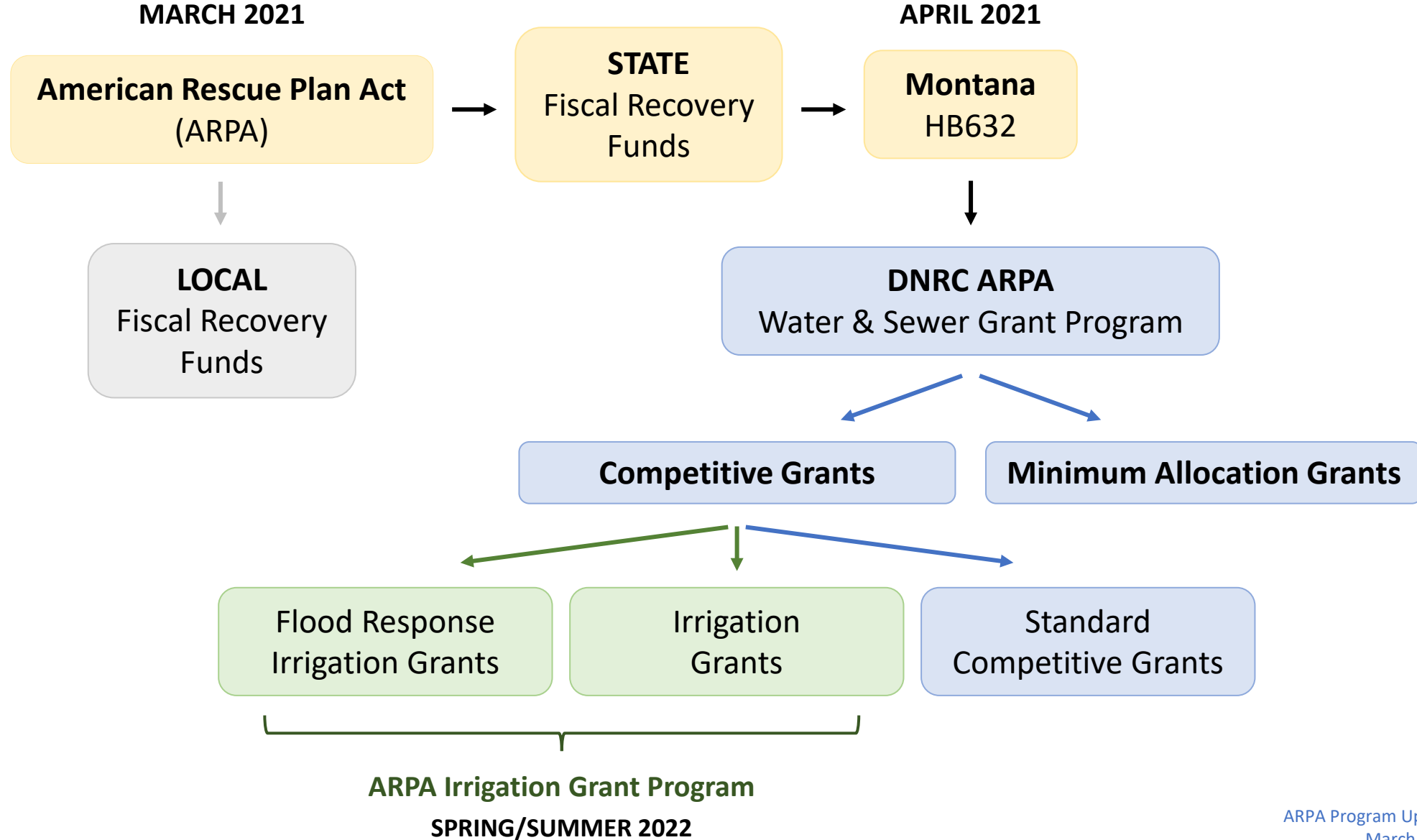
MARCH 2021



ARPA Water & Sewer Infrastructure Grants Overview



ARPA Water & Sewer Infrastructure Grants Overview



DNRC ARPA Program Goals by Year

2021

Understanding the DNRC ARPA Program

DNRC ARPA Program Goals by Year

2021

Understanding the DNRC ARPA Program

2022

Writing and Submitting Successful Grant Applications

DNRC ARPA Program Goals by Year

2021

Understanding the DNRC ARPA Program

2022

Writing and Submitting Successful Grant Applications

2023

Starting your ARPA Project off on the Right Foot

DNRC ARPA Program Goals by Year

2021

Understanding the DNRC ARPA Program

2022

Writing and Submitting Successful Grant Applications

2023

Starting your ARPA Project off on the Right Foot

2024

Setting your ARPA Project Up for Success

DNRC ARPA Program Goals by Year

2021

Understanding the DNRC ARPA Program

2022

Writing and Submitting Successful Grant Applications

2023

Starting your ARPA Project off on the Right Foot

2024

Setting your ARPA Project Up for Success

2025

Working Together to Finish Strong

DNRC ARPA Program Statistics

TOTAL AWARDS

446
Grant Awards

400
Million Dollars
in Awards

As of March 18th

To be Contracted: 18 Awards (4%)

Under Contract: 346 Awards (78%)

Completed: 78 Awards (18%)

33%

**ARPA Funds
EXPENDED**

DNRC ARPA Program Deadlines

December 31, 2025

Must **EXPEND** all DNRC ARPA Grant Funds and required match.
90 Days to provide final documentation and report.

DNRC ARPA Program Deadlines

December 31, 2025

Must **EXPEND** all DNRC ARPA Grant Funds and required match.
90 Days to provide final documentation and report.

December 31, 2024

DNRC ARPA grant must be **UNDER CONTRACT**.
Construction projects **SHOULD** have awarded a contractor.

DNRC ARPA Program Deadlines

December 31, 2025

**ARPA Local Fiscal Recovery Funds
are different**

Must **EXPEND** all DNRC ARPA Grant Funds and required match.
90 Days to provide final documentation and report.

December 31, 2024

DNRC ARPA grant must be **UNDER CONTRACT**.
Construction projects **SHOULD** have awarded a contractor.

DNRC ARPA Grant Agreement

GRANT AGREEMENT BETWEEN THE MONTANA DEPARTMENT OF NATURAL RESOURCES AND CONSERVATION AND [REDACTED]

THIS SUBAWARD (also referenced as "Grant Agreement" or "Agreement"), is administered by the Montana Department of Natural Resources and Conservation (DNRC) by the Resource Development Bureau (Program) and is accepted by [REDACTED] as the Subrecipient and represented by Mayor [REDACTED]. Both parties agree to the following terms and conditions:

SECTION 1. PURPOSE. Title VI of the Social Security Act (42 § U.S.C. 801 et seq.) (the Act) was amended by section 9901 of the American Rescue Plan Act (ARPA), Pub. L. No. 117-2 (March 11, 2021), to add section 602, which authorizes the United States Department of Treasury ("Treasury") to make payments to certain subrecipients from the Coronavirus State Fiscal Recovery Fund ("ARPA funds"). House Bill 632 governs the State's appropriation. The State of Montana received the funds on May 24, 2021. The purpose of this Grant Agreement ("Agreement") is to establish mutually agreeable terms and conditions, specifications, and requirements to grant ARPA funds to the Subrecipient for [REDACTED].

SECTION 2. TERM. The effective date of this Agreement is the date of last signing and ends **December 31, 2023**. As set forth in the Treasury's Federal Coronavirus State and Local Fiscal Recovery Funds (SLFRF) Interim Final Rule 86 Fed. Reg. 26786 ("Rule") and associated guidance issued on May 10, 2021, Subrecipient may use award funds to cover eligible costs incurred during the period that began on March 3, 2021, and ends on December 31, 2026. This agreement remains in effect until all reporting requirements as described in **SECTION 8. REPORTS** have been received by DNRC.

DNRC ARPA Scope

Attachment A - Scope of Work

Background:

[REDACTED] an overall average water loss of 30%, although some months it is more than 60%. This water loss is caused by leaking copper and lead service lines and deteriorating asbestos cement distribution piping dating back to the 1940s.

Scope of Work:

The proposed project will replace approximately 20% of the system's asbestos cement piping with new polyvinyl chloride (PVC) water mains. The project will also replace the lead and copper water service lines that have corroded over the years with new polyethylene service lines from the main line to the private property line. New water mains will be installed to loop the distribution system and prevent stagnant water at dead-end mains. ARPA Water and Sewer Infrastructure Grant funds will be used for professional services, audit fees, engineering services and construction. Construction related activities include the following:

- Replace approximately 7,750 feet of water main with new 6, 8, 10-inch PVC water main
- Replace 2,700 feet of water service from main to private property line and 90 water service connections.
- Install 20 new fire hydrants.

Facilities will be designed and constructed in accordance with sound engineering practices and will meet the requirements of Federal, State, and local agencies.

Schedule:

Project Engineering Phase	Project Bidding Phase	Project Construction Phase
November 2021	August 2022	May 2023



ARPA Grant Management



Grant Management
PowerPoint



Contact an ARPA
Grant Manager



>> Latest ARPA Award Information <<

Subrecipients of ARPA Water & Sewer Infrastructure grant funds are responsible for administering their projects and federal statutory and regulatory requirements. This page and its resources are intended to help DNRC's sub

> Start Here - Introduction to ARPA Grant Management

ARPA Water Sewer Grant Status
3/18/2024

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	Katherine Certalic	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	Katherine Certalic	AM-22-0018	Under Contract	12/31/2024						20754056	Anaconda - Deer Lodge County Wastewater	\$170,773
Anaconda-Deer Lodge County	Anaconda-Deer Lodge Water Distribution System Improvements	Anaconda-Deer Lodge	Katherine Certalic	AMC-23-0004	Completed	9/30/2023						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
Bearcreek, Town of	Bearcreek Water Preliminary Engineering Report	Carbon	Shawna Swanz	AM-22-0131	Completed	12/31/2023						24247873	Bearcreek Water System	\$32,376
Bearcreek, Town of	Bearcreek Water System Upgrades	Carbon	Shawna Swanz	AM-23-0244	Under Contract	12/31/2025					Carbon	33094875	Bearcreek Water System	\$0
Beaverhead County	Beaverhead County - Beaverhead-Jackson Water and Sewer District Wastewater Improvements	Beaverhead	Katherine Certalic	AM-23-0210	Under Contract	12/31/2025						32761815	Beaverhead County Jackson WSD Wastewater System	\$432,320
Beaverhead County	Beaverhead County Detention Center Water and Sewer Replacement	Beaverhead	Samantha Kemp	AM-22-0001	Completed	9/30/2022						20904517	Beaverhead County	\$33,638
Beaverhead County	Beaverhead County Water & Sewer District Town of Wisdom Wastewater Improvements	Beaverhead	Katherine Certalic	AM-23-0194	Under Contract	12/31/2024						29429455	Beaverhead County Water and Sewer District Town of Wisdom Wastewater System	\$130,300

DNRC ARPA Program Reminders

Thurs, April 4, 2024

ARPA Grantee Training Session 2
Online and In-Person (DNRC HQ)



DNRC ARPA Program Reminders

Thurs, April 4, 2024

ARPA Grantee Training Session 2
Online and In-Person (DNRC HQ)

Mon, April 15, 2024

2024 Quarter 1 Progress Reports are Due
New Progress Report Form



DNRC ARPA Program Reminders

Thurs, April 4, 2024

ARPA Grantee Training Session 2
Online and In-Person (DNRC HQ)

Mon, April 15, 2024

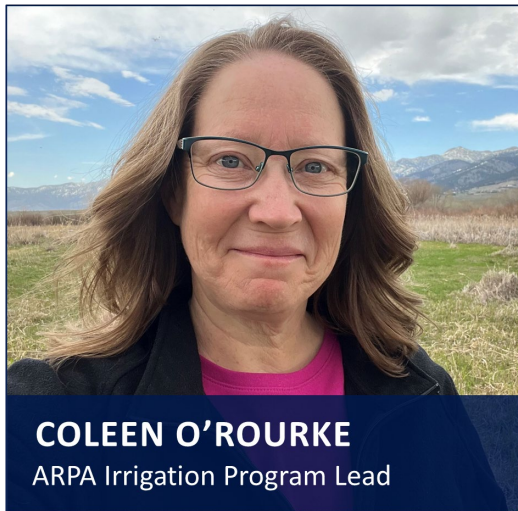
2024 Quarter 1 Progress Reports are Due
New Progress Report Form

June – July 2024

DNRC Fiscal Year End
Busy time of year for reimbursement requests



DNRC ARPA Grant Management Team



Drinking Water & Water Pollution Control State Revolving Fund Programs



SRF PROCESS



BENEFITS OF AN SRF LOAN

- **No Application Deadline**
- **Interest Rate – Currently 2.5%**
- **Loan Term – up to 30 Years***
- **Interim Financing – 1.75% (up to 3 years)**
- **DEQ Waives P&S Review Fees**
- **DEQ Prepares Environmental Review Documents**

Who Can Apply for an SRF Loan?

❖ Public Entities

- City, town, county, school, water and/or sewer district, or other local government unit

❖ Private Entities

- Nonpoint source pollution control projects
- Community drinking water project

TYPES OF SRF FINANCIAL ASSISTANCE

- ❖ **Direct Loans (e.g., engineering, construction, equipment, etc.)**
- ❖ **Interim Financing**
- ❖ **Purchase or Refinancing of Existing Debt**

TO QUALIFY FOR AN SRF LOAN

- ✓ **Project must be eligible**
 - **Protect Public Health**
 - **Protect / Improve Water Quality**
- ✓ **Project must be on the program's Project Priority List – (Survey)**
- ✓ **Completed Uniform Application & Supporting Documents**
- ✓ **Rates and charges in place to cover the loan and operation/maintenance of the improvements**

Intended Use Plan & Project Priority List (Separate IUPs for Base, LSL & EC)

- **Priority List is Updated Every Year (April/May-June)**
- **Survey Form Required - Important**
- **Not a Commitment**
- **Project Stays on List Until Completion, Regardless of Funding Sources**
- **Current Priority Lists:**
 - **~75 CWSRF projects**
 - **~80 DWSRF projects**

BIPARTISAN INFRASTRUCTURE LAW (BIL) (AUTHORIZED THROUGH FFY 2026)

- **Expanded Base SRF Funding (Supplemental)**
- **Emerging contaminants**
(e.g., PFAS, pharmaceuticals, manganese, etc.)
- **Lead service line replacements (DWSRF program only)**

Continuing Requirements for SFY 2024/2025

- **Federal Davis-Bacon & State Prevailing Wage Rates**
- **Additional Subsidy = Principal Forgiveness**
- **American Iron & Steel Requirements / Build America Buy America Requirements**

AMERICAN IRON AND STEEL (AIS) REQUIREMENT

“...all of the iron and steel products used in the project are produced in the United States.”

“iron and steel products” means lined or unlined pipes and fittings, manhole covers and other municipal castings, hydrants, tanks, flanges, pipe clamps and restraints, valves, structural steel, reinforced precast concrete, and construction materials.

BUILD AMERICA BUY AMERICA (BABA) REQUIREMENT

➤ **Effective May 14, 2022**

➤ **Applies to:**

- **Iron and Steel**
- **Manufactured Products**
- **Construction Materials**

DWSRF PROGRAM

30-year terms (with design life)

40-year terms (with design life and disadvantaged criteria)

Eligibility Key = Public Health

Source Development

Storage

Treatment

Distribution

Not Eligible = Projects Primarily for

Growth

Fire

O&M

BIPARTISAN INFRASTRUCTURE LAW (BIL)

Lead service line replacement (LSLR)

What is considered a lead service line for the LSLR pot of money?

A service line made of lead, a galvanized line that is or was ever downstream of a lead service line or service line of unknown material, and lead goosenecks, pigtails, and connectors.

Emerging contaminants

What is considered an emerging contaminant?

Focus on perfluoroalkyl and polyfluoroalkyl substances (PFAS)

Any contaminant listed on EPA's Contaminant Candidate Lists (CCL lists 1-5 www.epa.gov/ccl)

What is not considered an emerging contaminant

Contaminants already regulated under National Primary Drinking Water Regulations

BIL - LEAD SERVICE LINE AND EC

Lead service line replacement (LSLR) funding (loan & loan forgiveness)

- ❖ Funds can be used for planning, LSL inventories, design, non-routine lead sampling, full LSL replacement, temporary filters, etc.
- ❖ Project priority survey form and loan application
- ❖ Loan Interest rate of 1.5%
- ❖ Disadvantaged Communities - 60% of the loan as principal forgiveness if the after-project rates exceed 60% of the DOC Target Rates (water or combined water/wastewater rates).
- ❖ **Principal forgiveness given only for LSLR construction projects, and the water utility must assume the debt to repay the loan portion**
- ❖ Maximum forgiveness is \$2 million (current IUP - cash flow and demand dependent)

Emerging contaminants funding

- ❖ Project must be primarily for addressing Emerging Contaminants – planning, design, pilot studies, treatment, new source, consolidation, new PWS, etc.
- ❖ Project priority survey form and loan application
- ❖ 100% loan forgiveness (current IUP - cashflow and demand dependent)

DWSRF PRIORITY LIST

RANKING CRITERIA:

- ✓ **Documented Health Risks (acute & non-acute)**
- ✓ **Potential Health Risks (acute & non-acute)**
- ✓ **Proactive measures**
- ✓ **Regionalization (PWS consolidation)**
- ✓ **Affordability**

PRINCIPAL FORGIVENESS

Disadvantaged Community

- ❖ After project rates exceed the DOC Target Rates (water or combined water/wastewater rates)
- ❖ 50% of loan as principal forgiveness, other 50% at regular int. rate
- ❖ Maximum of \$3 million (SFY 2025 - cash flow & demand dependent)

Additional Hardship (**new SFY2025**)

- ❖ Consideration of LMI% and Poverty% (DOC numbers)
- ❖ 60% forgiveness for populations over 1,000 and
- ❖ 75% forgiveness for populations $\leq 1,000$

Schools (PWSs)

- ❖ Students receiving free or reduced lunch exceeds 20%
- ❖ 75% forgiveness, maximum \$750,000 (cash flow & demand dependent)

SET-ASIDES

(NON-PROJECT ACTIVITIES)

- **Capacity Development**
- **Technical Assistance**
- **Operator Certification**
- **PWS Program**
- **Source Water Protection**
- **LSLR Technical Assistance (BIL LSL Grant)**

Administered by the DOC

Help with LSL inventories, replacement plans, sampling plans, etc.

Financial assistance to small systems that do their own inventories (administered by DEQ)

Eligible Project Categories

DWSRF PROGRAM

- ✓ **Source Development**
- ✓ **Treatment**
- ✓ **Consolidation**
- ✓ **Security**
- ✓ **Storage**
- ✓ **Distribution**
- ✓ **Create New Systems**
- ✓ **Energy Efficiency**

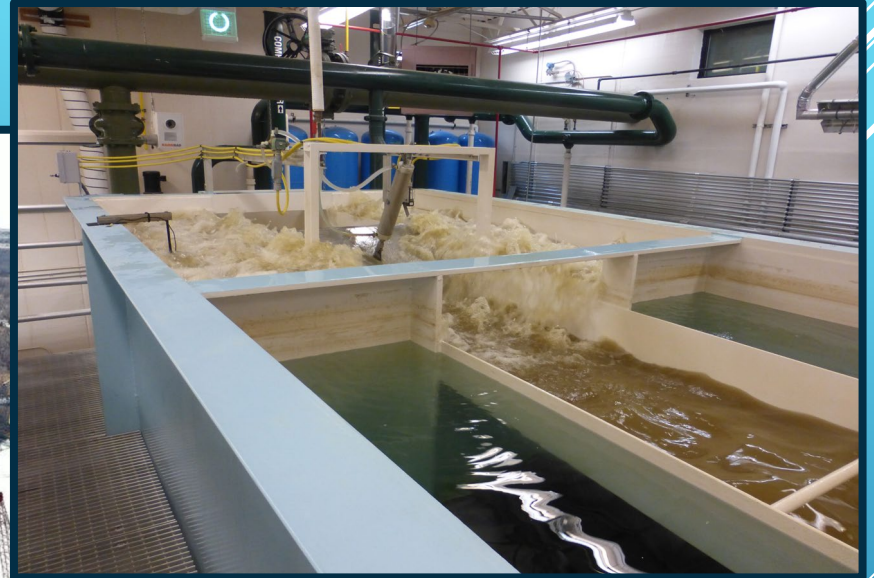
SOURCE DEVELOPMENT



WATER STORAGE TANKS



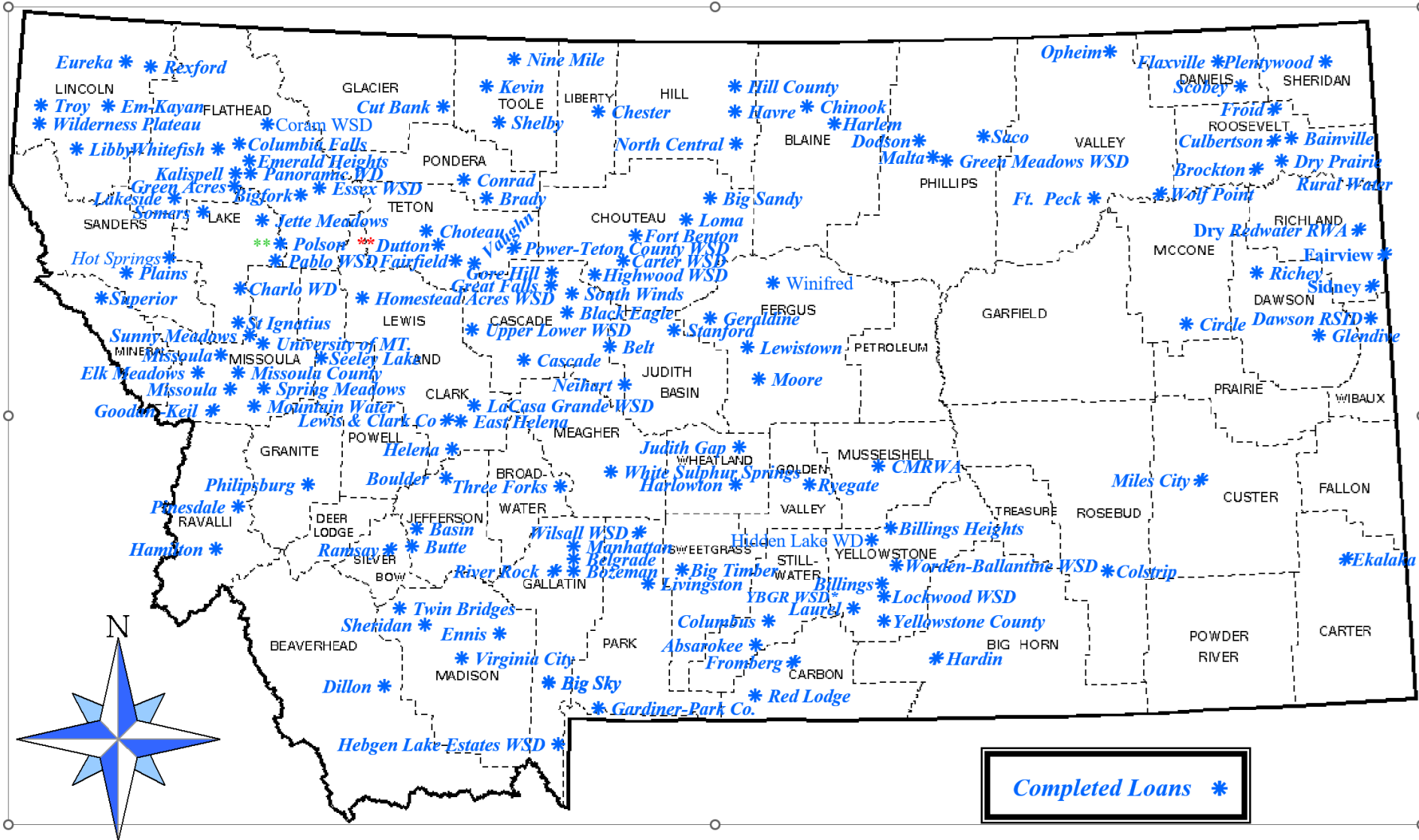
WATER TREATMENT



DISTRIBUTION MAINS



Drinking Water Revolving Fund Loans



**** Clearview Heights WD**

**** Ponderilla Hills W&SD**

*Department of Natural Resources and Conservation
Conservation and Resource Development Division*

January 11, 2024

WPCSRF PROGRAM

- **30-year loan term**
 - ✓ **Design Life**
 - ✓ **Short-Lived Assets Analysis**

- **Green Project Reserve (minimum 10% of cap grant)**
 - ✓ **Energy Efficiency**
 - ✓ **Water Efficiency / Conservation**
 - ✓ **Green Infrastructure (Stormwater)**
 - ✓ **Environmentally Innovative Projects**

- **Additional Subsidy***
 - ✓ **Principal Forgiveness**

WPCSRF RANKING CRITERIA FOR PRIORITY LIST

- ☐ **Water Quality Impairment / Public Health Threat**

- ✓ **Severity of the problem?**

- ☐ **Water Quality Improvement**

- ✓ **Effectiveness of the project to correct the problem?**

- ☐ **Activity-Specific Criteria**

- ✓ **Capacity Issues?**

- ✓ **Water/energy conservation?**

- ✓ **Beneficial reuse?**

- ☐ **Readiness to Proceed**

- ✓ **Engineer hired?**

- ✓ **Plans & Specifications approved by DEQ?**

- ✓ **All funding in place?**

WPCSRF PRINCIPAL FORGIVENESS

- **Percentages & Amounts dependent on:**
 - ✓ **Federal Appropriation**
 - **Base (20% - 40%)**
 - **Supplemental (49%)**
 - ✓ **Cash Flows**
 - ✓ **Demand / Project Readiness**

- **Affordability Criteria**
 - ✓ **User Rate/MHI**
 - ✓ **Unemployment Rate**
 - ✓ **Population Trends**
 - ✓ **Community Size**
 - ✓ **LMI Percentage**

- **Must take out long-term SRF Loan**
 - ✓ **Capped at a % of loan amount* or the max amount set per project, 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.**

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?



WASTEWATER TREATMENT



COLLECTION SYSTEMS



STORMWATER SYSTEMS

AGRICULTURAL BEST MANAGEMENT PRACTICES



Completed Loans *


← → ↻ deq.mt.gov/water/Programs/eng

MONTANA.GOV
OFFICIAL STATE WEBSITE

DEQ
MONTANA

ABOUT US PERMITTING & OPERATOR ASSISTANCE PUBLIC PARTICIPATION

AIR - CLEANUP & RECLAMATION - ENERGY - MINING - WATER - TANKS, WASTE & RECYCLING - Search...



Engineering Infrastructure & Subdivisions

[Home](#) / [Water](#) / [Programs](#) / [Engineering Infrastructure & Subdivisions](#)

Program Overview

The process of dividing land into parcels is a necessary and important function in the growth of a community. When, where, and how development occurs establishes land division patterns for the community that will last for generations.

CONTACTS

*Subdivisions and Engineering
Program Contacts*

SUBDIVISION REVIEW	▼
WATER AND WASTEWATER ENGINEERING REVIEW	▼
DRINKING WATER AND WATER POLLUTION CONTROL STATE REVOLVING FUND	▼

[Drinking Water Project Funding](#) ▼

[Waste Water Project Funding](#) ▼

[How to Apply](#) ▼

[Intended Use Plans and Project Priority List](#) ▼

[Reports](#) ▼

State Revolving Fund

<https://deq.mt.gov//water/Programs/eng>

DWSRF Program

Jake Goettle
Jake.Goettle@mt.gov
406-444-6824

Rob Ashton

Denver Fraser

Sandie Koenig

Wade Salyards

SRF Financial

Anna Miller
annam@mt.gov
406-444-6689

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*

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 allocated a total of \$18.9 million for FFY22 and FFY23.
- 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 - New

- HB-5 Section 5 (10) - 2023
 - *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 Info

Lead Mitigation Reimbursement Program

- Reimbursement up to \$50,000 (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. <https://deq.mt.gov/water/programs/dw-lead>
- Eligible Schools
 - Have completed their initial sampling round
 - Costs have to be related to addressing lead in their drinking water

Questions

Greg Montgomery

Public Water Supply

DEQ

406-444-5312

Gregory.Montgomery@mt.gov

<div> <div>Updated March 2024</div> <div>FINANCIAL ASSISTANCE PROGRAMS FOR WATER, WASTEWATER AND SOLID WASTE PROJECTS IN MONTANA</div> </div>										
Program Name	Eligible Applicants	Eligible Projects	Local Match Required	Planning Costs Covered?	Amount of Funds Available Per Project	Loan Repayment Period	Ranking Criteria	Funding Cycle (Deadline)	Special Requirements and Additional Information	Program Contact
MONTANA AND FEDERAL AGENCIES ACCEPTING THE UNIFORM APPLICATION										
U.S. Rural Development- US Department of Agriculture (USDA) a. Water and Environmental Loan and Grant Program b. Pre-Development Grants c. Search Grants	a., b., c. Counties & Municipalities, Water/Sewer Districts, Federally recognized Indian Tribes and Non Profits - Associations	a. Water, Wastewater, Storm water, and Solid Waste Systems (Construction, Repair, Expansion) b. Planning c. Planning	a. No b. Yes (25%) c. No	Yes, reimbursement as part of total project costs	a. Ratio dependent upon user rates, no limit or maximum for loans, 75% maximum grant b., c. \$30,000	a. 40 years or life of facility	Priority given to: Under 1,000 in population, Low income, Health hazards, and Extended service to additional rural users	Open-cycle	Population <10,000 Applicants must be unable to finance the project by use of commercial credit at reasonable rates and terms www.usda.gov	Steve Troendle USDA/Rural Development 2229 Boothill Ct. Bozeman, MT 59715 406-585-2520 steve.troendle@mt.usda.gov
Montana Department of Natural Resources and Conservation (DNRC) Renewable Resource Grant & Loan Program (RRGL) a. Renewable Resource Grants and Loans b. Project Planning Grants c. Emergency Grant Program	a., b. & c. Government entities (Includes Indian Tribes)	a., b. & c. Renewable Resource Conservation, Management, Development, and Preservation Projects	a., b. and c. No	a. & b. Yes c. No	a. Grants (Public) Up to \$125,000 a. Loans (Public) No maximum b. up to \$25,000 c. up to \$30,000	a. (Loans) 20 Years or less.	a. Resource benefits financial feasibility, project management, technical feasibility, b. Resource benefits c. Urgency and financial need.	a. Applications due on May 15 of even numbered years. b. as funding is available c. Open	a. Projects must conserve, manage, develop, or preserve a renewable resource. b. Preliminary engineering, planning, or other activities leading to a renewable resource project. c. Emergency projects that result in property damage or legal liability dnrc.mt.gov/Conservation/Grant-and-Loan-Programs/Renewable-Resource-Grants-and-Loans/	DNRC – RRGL Program 1539 11th Avenue, PO BOX 201601 Helena, MT 59620 Lindsay Volpe 406-444-9766 lmvolpe@mt.gov
Montana Department of Environmental Quality (DEQ) a. Water Pollution Control State Revolving Fund Loan (WPCSRF) b. Drinking Water State Revolving Fund Loan Program (DWSRF) Loans	a. Municipalities for wastewater projects - Municipalities and private entities for nonpoint source projects. b. All community public water systems.	a. Wastewater projects that solve water quality problems. b. Drinking water projects that achieve compliance with the Federal Safe Drinking Water Act.	a. No b. No	a. Yes b. Yes	a. & b. 100% of eligible project costs can be borrowed; ability to repay loan must be shown. Partial principal forgiveness may apply.	a. 30 years or less. Cannot exceed design life. b. 20 years or less. Qualifying disadvantaged communities are eligible for loan terms of up to 30 years and term cannot exceed the design life. a. & b. Up to 3 years for interim financing.	a. Impairment of water uses, extent project will restore water quality, public health improvement and readiness to proceed. b. Protect public health, comply with the Federal Safe Drinking Water Act, system affordability	a. & b. Open-cycle	a. & b. Projects must be included on the Project Priority List and Intended Use Plan; must demonstrate ability to repay loan. Must meet all Federal SRF requirements b. Organizational capacity is adequate to maintain compliance with the Federal Safe Drinking Water Act. www.deq.mt.gov	DEQ – State Revolving Fund 1520 E 6th Avenue PO BOX 200901 Helena, MT 59620 a. Mike Abrahamson (WPCSRF) 406-444-6776 mabrahamson@mt.gov b. Jake Goettle (DWSRF) 406-444-6824 jake.goettle@mt.gov
Montana Department of Commerce (DOC) Community Development Block Grant Program (CDBG) a. Public & Community Facility Grants b. Community Planning Grants c. Economic Development Grants (Federal grant administered by Commerce)	Incorporated cities and towns, and counties. Note: Counties may apply on behalf of water/sewer district, tribal utility authorities, cities and town, and NGOs.	a. Public infrastructure improvements such as water, wastewater, solid waste, hookup fees and assessments, and improvements to community spaces not used for government business such as senior centers, food banks, and community centers. b. Planning documents such as PER, PAR, CIP, growth policy update, housing study, master plans. c. Projects that create or retain jobs for at least 51% low and moderate – income individuals	Yes a. 25% local match) b. 1 to 3 match (33% match) c. Contact the program	Yes, for costs associated with engineer and grant administration.	a. \$750,000 b. Up to \$50,000 c. Contact the program	C. Contact the program.	Community planning assessment, project need, concept and technical design, community efforts, financial assistance, benefit to low and moderate income	a. Annual competition-spring of the year b. & c. Contact the program	a. At least 51% of the beneficiaries of a project must be low or moderate income. b. Planning such as PER, CIP & community development planning. See website for eligibility options. comdev.mt.gov	Infrastructure: Jeanette Blize, Outreach Coordinator, Community MT, 406-841-2782 jblize@mt.gov Community Facilities: Rosie Goldich, CDGB Coordinator, Community MT, 406-841-2787 rose.goldich@mt.gov Mackenzie Espeland, Community & Economic Development Supervisor, Community MT, 406-841-2794 mackenzie.espeland@mt.gov
Montana Department of Commerce Montana Board of Investments INTERCAP Loan Program Loans	Local government units, Special Purpose Districts, Water/Sewer Districts And Tribal governments	Water & Wastewater Systems, Solid Waste (Construction, repair, expansion, equipment, vehicles, planning, interim financing)	No	Yes	100% of eligible projects can be borrowed; ability to repay loan must be shown. Over \$3 million on a case by case basis.	Up to 15 years	No ranking criteria. Board examines applicant’s financial profile and repayment ability.	Continuous cycle	www.investmentmt.com	MT DOC Board of Investments PO BOX 200126 Helena, MT 59620 Louise Welsh 406-444-0891 lwelsh@mt.gov

FINANCIAL ASSISTANCE PROGRAMS FOR WATER, WASTEWATER AND SOLID WASTE PROJECTS IN MONTANA

Program Name	Eligible Applicants	Eligible Projects	Local Match Required	Planning Costs Covered?	Amount of Funds Available Per Project	Loan Repayment Period	Ranking Criteria	Funding Cycle (Deadline)	Special Requirements and Additional Information	Program Contact
Montana Department of Commerce Montana Coal Endowment Program (MCEP) a. Construction Grants b. Infrastructure Planning Grants c. Emergency Grants	Incorporated cities and towns, counties, water, sewer and solid waste districts, and federally recognized tribal governments.	Drinking water systems, wastewater treatment, sanitary or storm sewers, solid waste systems, and bridges.	a. Yes, typically 50%, which can include other grants b. Yes, 20% of total project cost c. Local participation required.	a. Yes, for costs associated with engineer and grant administration.	a. Up to \$750,000 b. Up to \$40,000 c. \$15,000 - \$30,000	Not Applicable	Health and Safety, financial need, technical design, planning and management, other funding for the project, economic development, and community support.	a. Spring of even numbered years. b & c. Applications accepted in spring in odd numbered years until appropriation is gone. c. Applications accepted until appropriation is gone	a. Funding and awards approved by Legislature. b. Funding approved by the Legislature. Awards approved by Commerce. c. Funding approved by Legislature. Awards approved by Commerce.	Jeanette Blize, Outreach Coordinator, Community MT, 406-841-2782, jblize@mt.gov Alisha Oellerman, Planning Specialist, Community MT, 406-841-2226, alisha.oellerman@mt.gov Jeanette Blize, Outreach Coordinator, Community MT, 406-841-2782, jblize@mt.gov
Montana Department of Commerce State-Local Partnership Act (SLIPA)	MT incorporated cities and towns	Water, wastewater, fire suppression, streets, roads, bridges, landfills, streetlights, airports, public grounds, and buildings	25% of total project cost		Amount allocated to each city/town based on formula in HB 355	Not Applicable		One time only funding, recommend applications be submitted by March 30, 2024, but may be accepted after that		Collin Zollinger, Community MT Infrastructure Program Specialist, 406-841-2756, collin.zollinger@mt.gov Ashly Amato, Community MT Infrastructure Program Specialist, 406-841-2910

ADDITIONAL FEDERAL FUNDING PROGRAMS

U.S. Economic Development Administration (EDA) Public Works Grants (Federal)	Municipalities, Counties, Indian Tribes, nonprofits	Water and Wastewater Systems	Yes	Yes, under the Technical Assistance Program	Generally, not to exceed \$3,000,000, but may be waived in special circumstances.	Not Applicable	Investment priorities found on https://www.eda.gov/funding/investment-priorities	Applications accepted at any time.	Project tied to economic development, job creation, or retention. Must comply with federal regulations www.eda.gov	Aaron Pratt PO BOX 10032 Bozeman, MT 59719 406-599-9795 apratt@eda.gov
U.S. Army Corps of Engineers (USACE) Rural Montana Environmental Infrastructure and Resource Development Program (Section 595, WRDA 1999), funding assistance.	Public entities (Includes Indian Tribes)	Wastewater treatment and related facilities, water supply and related facilities, environmental restoration and surface water resource protection and development.	75% federal/25% local cost share.	Planning costs can count towards local cost share or can be reimbursed, even when incurred prior to signing a project partnership agreement.	No specific amount per project, but typically no more than \$1,500,000. Funding for this program varies year to year.	Not Applicable	None	No specific deadline. Funds are announced in the Corps Work Plan, and projects receiving funds are notified, funding tied to Federal fiscal year appropriation process.	Funds are to be obligated (reserved to project) in the same fiscal year that funds are appropriated. Obligation of funds occurs after the sponsor and Corps sign a project partnership agreement. Funding assistance is provided as reimbursement of costs, and those reimbursements can occur after the year funding is obligated if needed. See website for Program information: www.usace.army.mil/Missions/Civil-Works/Project-Planning/WRDA-7001-Proposals/	USACE Omaha District 1616 Capitol Avenue Omaha, NE 68102-4901 888-835-5971 or 402-995-2702 hqplanning@usace.army.mil
U.S. Army Corps of Engineers (USACE) Technical Assistance Programs a. Planning Assistance to States & Tribes (Sec. 22, WRDA 74) b. Flood Plain Management Services Program (FPMS) (Sec. 206, Flood Control Act (FCA) of 1960)	States, local governments, federally-recognized Indian Tribes, non-federal entities (w/local government support)	Broad range of water resource issues. These programs are planning level only and do not lead to construction.	a. 50% federal; 50% non-federal b. 100% federal	These studies are inherently planning level studies only. Refer to information on the local match required.	Federal limit: a. \$2 million for each state or Tribe per year b. \$1 million per state per year	Not Applicable	USACE discretion within available funds.	No specific deadline, but federal share is tied to the federal appropriation process.	Interested sponsors should submit a letter of request. More information can be found at www.nwo.usace.army.mil/Missions/CivilWorks/Planning.aspx	Planning Branch USACE, Omaha District 1616 Capitol Avenue Omaha, NE 68102 402-995-2701 402-995-2680 hqplanning@usace.army.mil

ADDITIONAL STATE FUNDING PROGRAMS

FINANCIAL ASSISTANCE PROGRAMS FOR WATER, WASTEWATER AND SOLID WASTE PROJECTS IN MONTANA

Program Name	Eligible Applicants	Eligible Projects	Local Match Required	Planning Costs Covered?	Amount of Funds Available Per Project	Loan Repayment Period	Ranking Criteria	Funding Cycle (Deadline)	Special Requirements and Additional Information	Program Contact
Montana Department of Natural Resources and Conservation Reclamation & Development Grants a. RDG Project Grants b. RDG Planning Grants	Government Agencies (Includes Indian Tribes)	Reclamation of land, water or public infrastructure affected by mining or hazardous waste sites	No	a. Some b. Yes	a. Up to \$500,000 b. Up to \$50,000	Not Applicable	a. & b: Reclamation results in natural resource benefits; need and urgency; appropriate technical design; project management; and financial feasibility.	a. Applications due May 15 of even numbered years. b. As funds are available.	a. Primary purpose is to reclaim land damaged by resource extraction. Also, funds projects that meet a crucial state need. b. Funds available for site investigations and project planning dnrc.mt.gov/Conservation/Grant-and-Loan-Programs/Reclamation-and-Development-Grants/	Samantha Treu 1539 11th Avenue PO BOX 201601 Helena, MT 59620 406-444-3369 samantha.treu@mt.gov
Department of Commerce (DOC) Montana Coal Board Grant Program	Counties & Municipalities, Local Government Units, State Agencies, Special Districts, Water/Sewer Districts, federally recognized Indian Tribes	a. Water, wastewater, solid waste systems, roads, bridges, road equipment, planning, other types of projects that are impacted by coal development.	Financial need and local effort are considerations.	Yes, for costs associated with engineer and grant administration.	a. No limit	a. Not Applicable	Planning, need, severity of impact, availability of funds, and degree of local effort.	a. Continuous cycle, applications due 45 days prior to quarterly meetings.	Areas experiencing impacts from coal development or decline. Funding approved by Coal Board. comdev.mt.gov	Community Development Division Staff 301 S Park Avenue, PO Box 200523 Helena, MT 59620 406-841-2770 doccdd@mt.gov
U.S. Indian Health Service (IHS) Sanitation Facilities Construction Program Grants (Federal)	Federally-recognized Indian Tribes	Water and sewer facilities for new non-HUD funded housing; Funding to correct sanitation deficiencies.	No, but points are added for contributions to project.	Planning is provided by IHS engineers.	\$15,000 to \$40,000 limit per home, depending on situation.	Not Applicable	Deficiency level, O&M capability, Tribal Priority, Capital Cost, Health Impact, Previous Service from Federal Agencies, and other considerations.	May 1 of each year	See Ranking Criteria on website www.ihs.gov	Todd Rydquist U.S. Public Health Service Director Sanitation Facilities Construction Billings Indian Health Service 2900 4 th Ave North, Billings, MT 59107 todd.rydquist@ihs.gov 406-247-7100
FEMA – Hazard Mitigation Grant Program	States; Tribes; Local governments are eligible subapplicants and can sponsor applications on behalf of individuals, businesses and private nonprofits to submit to the applicant	FEMA offers a variety of disaster assistance programs with different eligibility requirements. HMGP provides funds to states, tribes, and local communities after a disaster declaration to protect public or private property through various mitigation measures. Hazard mitigation includes long-term efforts to reduce the impact of future events.	Yes. 25% non-federal match		Funding is limited based on the total costs of the disaster.	Not Applicable	Project subapplications submitted for consideration for BRIC funding must be consistent with the goals and objectives identified in the current, FEMA-approved State or Tribal (Standard or Enhanced) Hazard Mitigation Plan along with the local or tribal hazard mitigation plan for the jurisdiction in which the activity is located.	Varies - these applications cycles open up post-disaster	https://www.fema.gov/pre-disaster-mitigation-grant-program	Sara Hartley (Montana DES) 406-324-4794 Sara.Hartley@mt.gov
FEMA - Pre-Disaster Mitigation Grants This program is being replaced with the FEMA Building Resilient Infrastructure and Communities Grant Program (BRIC)	States; Tribes; Local governments are eligible subapplicants and can sponsor applications on behalf of homeowners to submit to the applicant	This program awards planning and project grants and provides opportunities for raising public awareness about reducing future losses before disaster strikes. Mitigation planning is a key process used to break the cycle of disaster damage, reconstruction, and repeated damage.	Yes. 25% non-federal match	Yes	Funding is limited based on a formula of obligations from the Disaster Relief Fund from the previous year for all active disasters, not just one disaster. The percentage for BRIC is 6% and is available nationwide. Individual projects are limited to a federal share of \$10 million.	Not Applicable	Projects submitted for BRIC funding must be consistent with the goals and objectives identified in the current, FEMA-approved State or Tribal (Standard or Enhanced) Hazard Mitigation Plan along with the local or tribal hazard mitigation plan for the jurisdiction in which the activity is located. The BRIC Program is a competitive grant program and FEMA program is a competitive grant program. FEMA awards based on project	Varies; Typically January 31	https://www.fema.gov/pre-disaster-mitigation-grant-program This program is transitioning to the FEMA Building Resilient Infrastructure and Communities program: BRIC.	Sara Hartley (Montana DES) 406-324-4794 Sara.Hartley@mt.gov

FINANCIAL ASSISTANCE PROGRAMS FOR WATER, WASTEWATER AND SOLID WASTE PROJECTS IN MONTANA										
Program Name	Eligible Applicants	Eligible Projects	Local Match Required	Planning Costs Covered?	Amount of Funds Available Per Project	Loan Repayment Period	Ranking Criteria	Funding Cycle (Deadline)	Special Requirements and Additional Information	Program Contact
							ranking and the eligibility and cost-effectiveness of the project.			
FEMA - Flood Mitigation Assistance	States; Tribes; Local governments are eligible subapplicants and can sponsor applications on behalf of homeowners to submit to the applicant	This program provides funding for projects and planning that reduces or eliminates long-term risk of flood damage to structures insured under the National Flood Insurance Program (NFIP). The goal of the program is to reduce or eliminate flood risk of severe repetitive and repetitive flood damage to buildings insured by the NFIP.	Yes. 25% non-federal match	Yes	Funds available are dependent on what is appropriated on an annual basis. Up to \$10 million may be available for community flood mitigation projects	Not Applicable	Projects must be consistent with the goals and objectives identified in the current, FEMA-approved State or Tribal (Standard or Enhanced) Hazard Mitigation Plan along with the local or tribal hazard mitigation plan for the jurisdiction in which the activity is located. FEMA program is a competitive grant program. FEMA awards based on project ranking and the eligibility and cost-effectiveness of the project.	Varies; Typically January 31	https://www.fema.gov/flood-mitigation-assistance-grant-program	Sara Hartley (Montana DES) 406-324-4794 Sara.Hartley@mt.gov
PROGRAMS SPECIFICALLY FOR FUNDING TRIBAL PROJECTS										
U.S. Environmental Protection Agency (EPA) a. Clean Water Act (CWA) b. Safe Drinking Water Act (SDWA) Indian Set Aside Grants (Federal)	Federally-recognized Indian Tribes	Water and sewer facilities for Indian homes served by community facilities or that could be consolidated into community facilities. Fund planning, design and construction for water & wastewater facilities that serve Indian Tribes.	No	Yes	No limit, but typically less than \$750,000	Not Applicable	a. IHS Sanitation Deficiency System is used. b. Improvements in: public health, public safety, ability to comply, environment, adequacy, efficiency, and utility capacity.	Usually the end of March each year.	Tribes may choose a direct grant from EPA or enter into an agreement with EPA and IHS to transfer funds to IHS, who then administers the project. www.epa.gov	Bruce Cooper U.S. EPA Region 8 Tribal Solid Waste Coordinator 1595 Wynkoop St. Denver, CO 80202 303-312-6135 Cooper.bruce@epa.gov
TECHNICAL ASSISTANCE PROVIDERS										
Midwest Assistance Program (MAP) Provides free technical assistance for water, wastewater, and solid waste needs	Montana rural communities and tribal nations	N/A	N/A	N/A	N/A	N/A	N/A	N/A	www.map-inc.org/	Chad Thompson Regional Field Manager Bozeman, MT 59771 619-387-6344 cthompson@map-inc.org
Montana Rural Water Systems Water & Waste Water Technical Assistance and Training, Source Water Protection - USDA EPA Water Training, Septic, and Wastewater Program	All Public Water Supply Systems	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Circuit Riders serve populations less than 10,000, all other programs serve all public water supplies www.mrws.org/	John Camden 525 Central Ave M6 Great Falls, MT 59401 406-454-1151 MTRuralWater@mrws.org

Updated 03/2024 - Updated annually by the Water, Wastewater, and Solid Waste Action Coordinating Team dnrc.mt.gov/divisions/cadd/wasact

Grant Funding Opportunities



Community MT

Gus Byrom, CTAP Planner
Rosie Goldich, CDBG Coordinator

Community MT

Montana Coal Endowment Program (MCEP—formerly TSEP): Public infrastructure projects, planning & emergency grants

CDBG: Infrastructure, public & community facilities, housing projects, economic development, planning grants

Coal Board: Projects related to impacts from coal development, planning grants

Hard Rock: Board/Plan Assistance

Community Technical Assistance Program (CTAP): Community planning and technical assistance for water/wastewater infrastructure including ARPA

Montana Main Street: Planning & activity grants

Montana Historic Preservation Grants: Preserve historic sites, historical societies or history museums



Our Partners

- Local Governments
- Districts
 - Water & Sewer
 - School
 - Irrigation
- Non-profits
- Certified Regional Development Councils (CRDC)
- Engineers, Architects, & Grant Administrators
- Housing & Economic Developers
- Federal & State Funding Entities



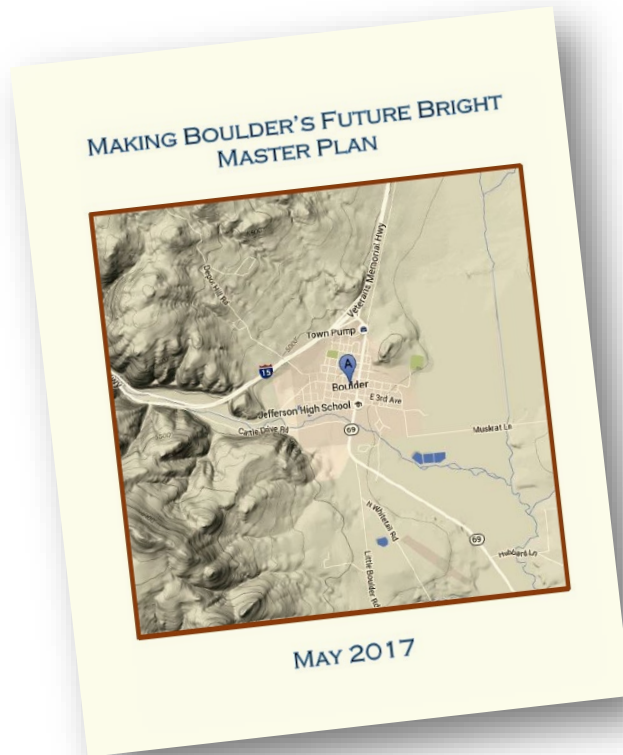
Community Technical Assistance Program (CTAP)

Expertise includes:

- Long-range community planning
- Subdivision regulations & review
- Zoning regulations & administration
- Drinking water & wastewater treatment systems
- Transportation: bridges, streets/roads, multi-modal
- Storm water management
- Exemption review & certificates of survey
- ARPA
- Lead Service Lines (LSL) Inventory



Community Technical Assistance Program (CTAP)



How we can help:

- Direct assistance via phone, email & in person
- Review and guidance on draft plans and policies
- Advice about navigating ARMs and statutes
- Model documents and planning resources
- On-site and virtual training workshops
- ARPA and LSL TA

Montana Main Street Program

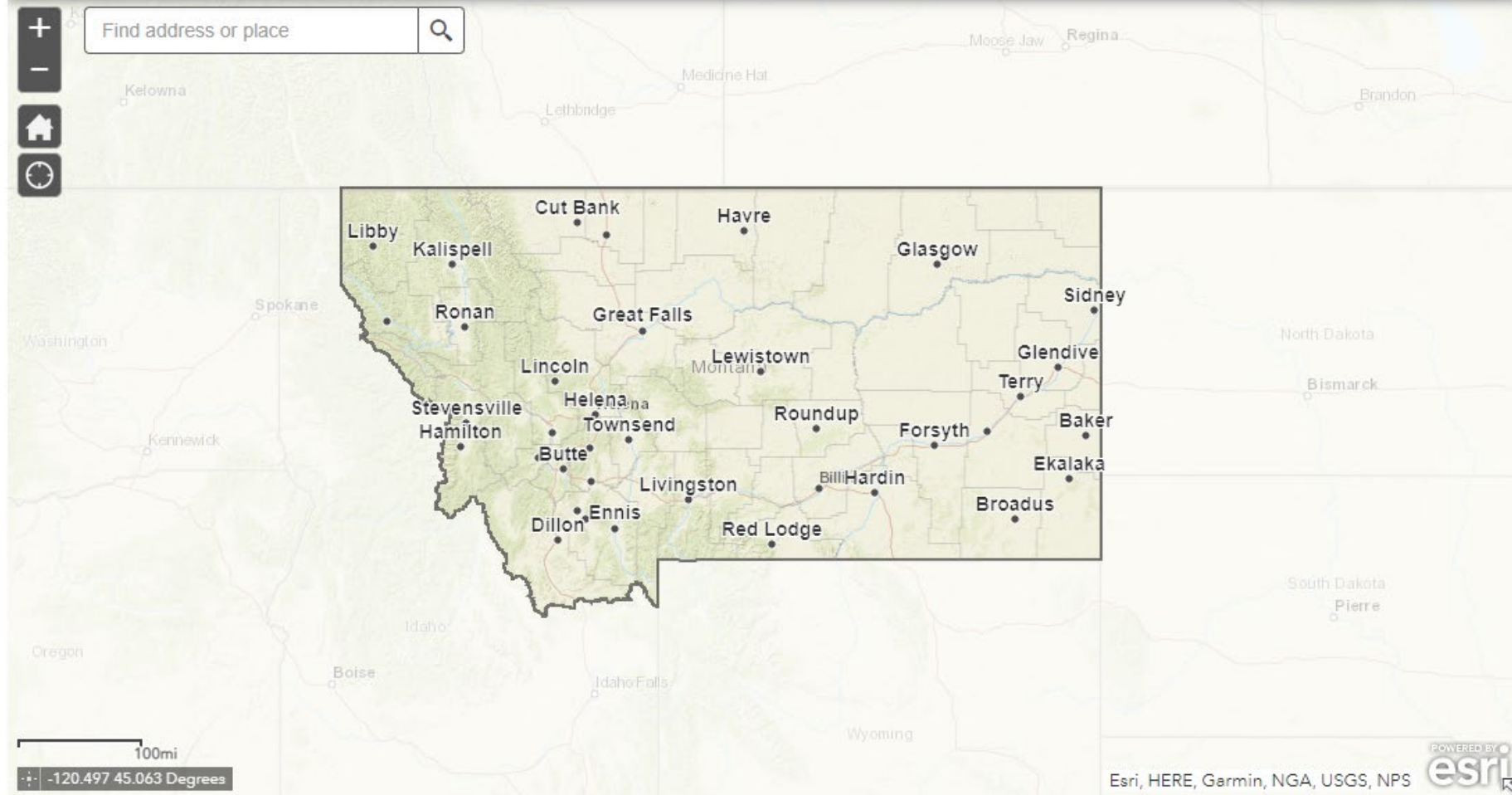


- Direct assistance via phone, email & in person
- Grants for member communities for planning and brick and mortar projects emphasizing downtown revitalization
- Technical assistance for all Montana communities working on community revitalization
- Collaborative effort between Community MT and Brand MT (Tourism)
- 37 member communities statewide





Montana Main Street Program



MONTANA



Montana Historic Preservation Grant Program (MHPG)



- State-funded program created in 2019 as a result of Senate Bill 338.
- Supports the preservation of historic sites, historical societies, or history museums grants.
- Demonstrates the economic impact of historical resources throughout the state.
- Application cycle: March 1 of even years, funding decisions made by the Legislature.
- Applicants can be individuals, associations, or local government.
- Max Grant: \$500,000 per eligible project with 20% match.

Community Development Block Grant - Planning

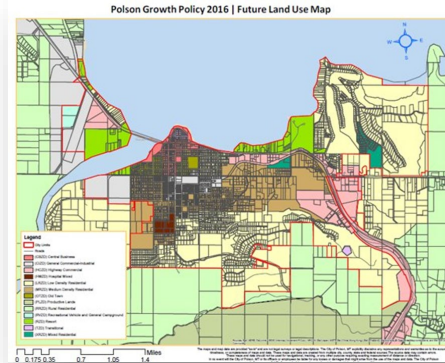
Eligible Activities:

- Growth Policies
- Capital Improvements Plans (CIP)
- Housing Plans & Market Studies
- Historic and Architectural Preservation Plans & Studies
- Downtown Revitalization Plans & Studies
- Preliminary Engineering Reports (PER)
- Preliminary Architectural Reports (PAR)
- Site-specific plans and studies for Economic Development

Application cycle: March 11, June 28, November 1

Match: 1:3 (1:1 for private economic development projects)

Max Grant: \$50,000



Community Development Block Grant – Community and Public Facilities



Eligible Activities:

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

Application Cycle: Fall 2024
(annual)

Match: 25%

Max Grant: \$750,000





Community Development Block Grant – Economic Development

Eligible activities:

For creation and retention of jobs
with an emphasis on low- and
moderate-income persons

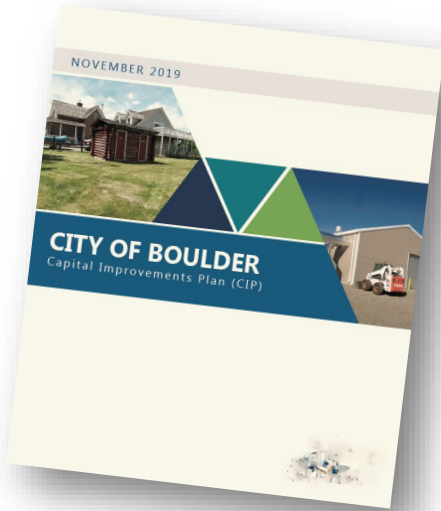
Application cycle: Ongoing

Match: 1:1

Max Grant: \$525,000



Montana Coal Endowment Program - Planning



Eligible Activities:

- Capital Improvements Plans (CIP)
- Water/Wastewater Preliminary Engineering Reports (PER)
- Bridge PER
- Bridge CIP

Application Cycle: 2025 Biennium cycle opens Summer 2023; non-competitive—open until all funds obligated

Match: 1:1

Max Grant: \$15,000

Montana Coal Endowment Program - Infrastructure

Eligible Projects:

- Drinking Water
- Wastewater Treatment
- Sanitary Sewer
- Storm Sewer
- Solid Waste
- Bridges

Application Cycle: 2025 Biennium cycle opens May 2024; non-competitive—open until all funds obligated

Deadline: May 2024

Match: 1:1





Montana Coal Board Projects

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.

Eligible Applicants: Local governmental units (cities, towns, counties, school districts, water and sewer districts, etc.); State agencies; Governing bodies of federally recognized Indian tribes.

Deadline: 45 days before quarterly board meetings

Application Type: Competitive

Match: None

Ceiling: Dependent upon request/need



State-Local Infrastructure Partnership Act of 2024 (HB 355, “SLIPA”)

The 2023 Legislature set aside \$20 million to distribute to incorporated cities/towns for eligible infrastructure projects.

Eligible projects:

- Drinking water systems
- Wastewater systems
- Fire suppression systems
- Streets and roads
- Bridges
- Landfills
- Streetlights
- Airports
- Public grounds and buildings

Funding is distributed based on street mileage and population.

Incorporated Cities and Towns may apply by 03/30/2024. Cities and Towns are encouraged to attach their developed list of priority projects to their application. A local cash match of 25% of the total project cost is required. More information is on the Community MT webpage.



APPLICATION PROCESSES

- **Individual Application**

- See Individual Program website

- Visit: <http://comdev.mt.gov>

- Review program specific needs

- **Uniform Application**

- Infrastructure

- Visit: <http://dnrc.mt.gov/divisions/cardd/wasact>

- **Various Application Due Dates**

2025-2029 Consolidated Plan Housing and Community Needs Survey



We will also have paper surveys
available at the Department of
Commerce table.

The Montana Departments of Commerce
and Public Health and Human Services
invite you to participate in the 2024
Montana Housing and Community Needs
Survey. Responses will be used to
develop Montana's 2025-2029
Consolidated Plan for Housing and
Community Development.

The survey, which should take 8-10
minutes to complete, will help the State
identify and address critical needs in
communities throughout Montana.

Keeping Up with Community MT

Visit our website:

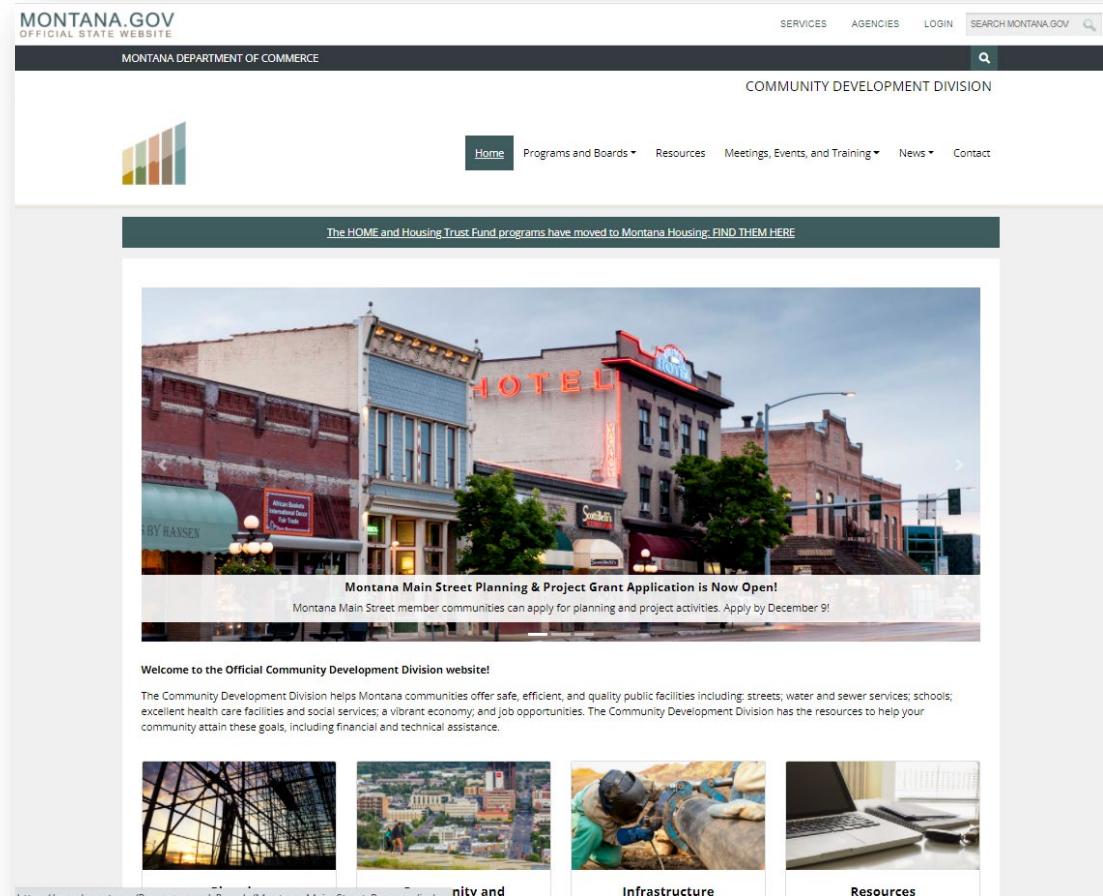
www.comdev.mt.gov

Questions?

Contact us!

DOCCDD@mt.gov

406.841.2770



**Build America Buy America (BABA)
Funding Agency Coordination:
USDA Rural Development, DEQ SRF,
Community Development Block Grants**

What is BABA?

Construction projects that are funded with federal grants issued after May 14, 2022 must comply with Build America, Buy America requirements (unless a national waiver applies). The following products and materials must be purchased domestically:

- **Iron and Steel**

- Same as AIS

- **Manufactured Products**

- Cost of components that are mined, produced, or manufactured in the U.S. is greater than 55 percent of the total cost of all components of the manufactured product

- **Construction Materials**

- Non-ferrous metals, plastic and polymer-based products (including PVC, composite building materials, and polymers used in fiber optic cables), glass (including optic glass), lumber, drywall, engineered wood

RD, SRF, and CDBG all receive and use federal grants to fund their programs.

❖ **SUMMARY:** All products/materials in a construction project for drinking water and wastewater systems must meet BABA with the exception of cement and cementitious materials, aggregates such as stone, sand, gravel, and aggregate binding agents/additives.

Examples of Products/Materials

Manufactured Products

- Pumps
- Motors
- Blowers/Aerators
- Generators
- Instrumentation and control systems
- Meters
- Treatment equipment
- Valves (<50% iron/steel)
- Meters
- HVAC

Construction Materials

- PVC pipe
- PVC fittings
- Nonferrous metals
- Nonferrous roofing materials
- Glass
- Materials used to construct a building
 - Drywall
 - Lumber or engineered wood
- Fiber optic cable

Iron and Steel Products

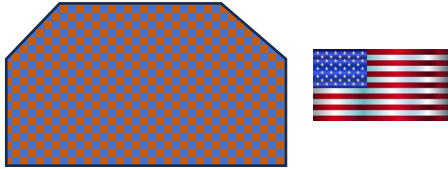
- | | | |
|----------------------------|---|----------------------|
| • Valves (>50% iron/steel) | • Pre-cast iron/steel reinforced concrete | • Municipal castings |
| • Hydrants | • Fencing | • Manhole covers |
| • Tanks | • Lined/unlined pipe | |
| | • Pipe fittings | |

Manufactured Products

Federal regulation (§184.5) discusses how to determine cost of components for the 55% requirement for manufactured products

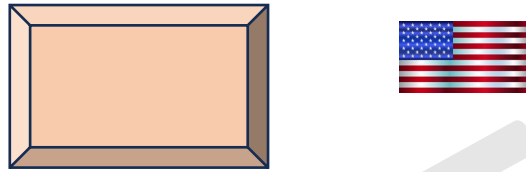
- (a) For components purchased by the manufacturer, the acquisition cost, including transportation costs to the place of incorporation into the manufactured product (whether or not such costs are paid to a domestic firm), and any applicable duty (whether or not a duty-free entry certificate is issued); or**
- (b) For components manufactured by the manufacturer, all costs associated with the manufacture of the component, including transportation costs as described in paragraph (a) of this section, plus allocable overhead costs, but excluding profit. Cost of components does not include any costs associated with the manufacture of the manufactured product.**

Manufacturer A - Located in US



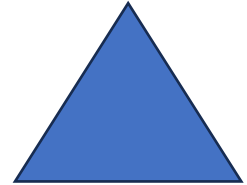
- Product component manufactured in US

Manufacturer C - Located in US

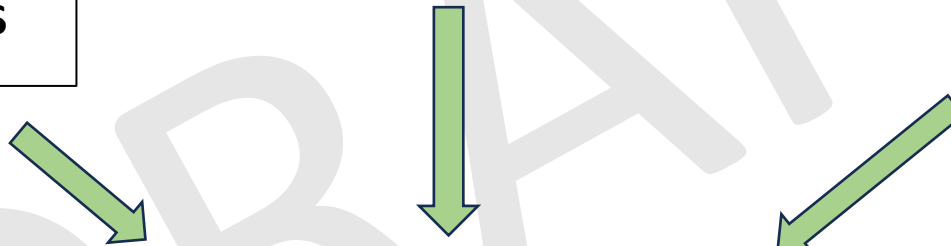


- Product component manufactured in US
- Product assembly for all components in US

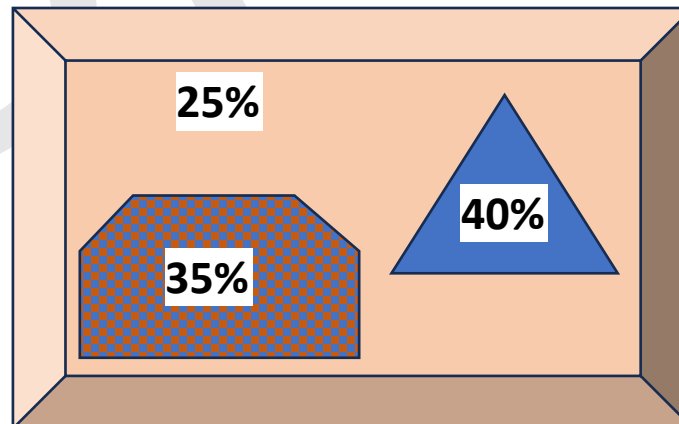
Manufacturer B - Located Outside of US



- Product component manufactured outside the US



Manufacturer C Product Content Percentages:



Product Content Test

25% + 35% = 60% Made in US
40% Not Made in US

Manufactured Product is BABA Compliant

Manufacturers A and C provide BABA certifications

BABA Product Waivers

- **Types of product-specific waivers**
 - **Nonavailability waiver**
 - Not produced in the United States in sufficient and reasonably available quantities or of a satisfactory quality
 - **Public interest waiver**
 - Applying the domestic content procurement preference would be inconsistent with the public interest.
 - **Cost waiver**
 - Applying the domestic content procurement preference will increase the cost of the overall project by more than 25 percent

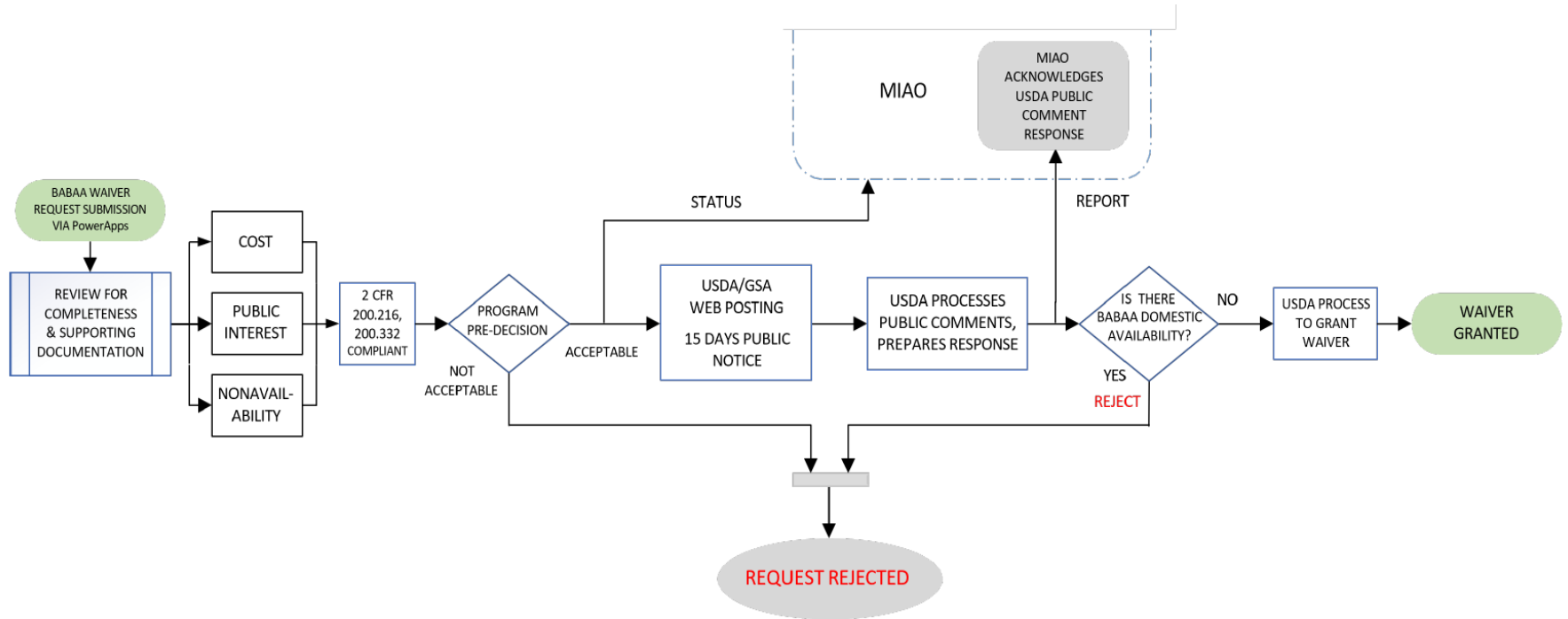
NOTE: If you think you need a product waiver, apply for it as early as possible. Federal agency waiver review times can be extensive.

Applying for a BABA Product Waiver

- **Borrower/grant recipient applies for waiver by providing supporting documentation to the funding agency (RD, SRF, CDBG)**
- **Supporting documentation includes:**
 - Brief summary of the project,
 - Description/explanation of the need for the waiver,
 - Brief summary of the due diligence conducted in search of domestic alternatives,
 - Quantity and materials of the product(s) in question,
 - Engineering specifications and project design considerations regarding product,
 - Unit cost of items (both foreign and domestic) in addition to an estimated cost of the materials and overall project,
 - Date any products will be needed on site in order to avoid significant project schedule disruptions, and
 - Any other pertinent information
- **Funding agency reviews waiver to ensure completeness and submits to respective federal agency for review**
 - Public notice (15 days)
 - Made In America Office review
- **Keep in mind, each federal agency may have some variations to this process but required information is generally the same**

Work with your funding agency on the waiver process.

Waiver Process Example



BABA National Waivers

- **SRF**

- Small Project/Award Threshold Waiver - <\$250,000
- De Minimis Waiver – 5% total project cost
- Adjustment Period Waiver – “Documented” projects prior to May 14, 2022
 - A sunset date was enacted in Fall 2023. Most projects no longer qualify for this waiver. Contact your SRF engineer with questions.

- **RD**

- Previously Planned Projects on or before February 4, 2023
- Small Project/Award Threshold Waiver : <\$250,000
- De Minimis Waiver – total cost cannot exceed 5% total project cost
- Project Cost Overrun Waiver : June 20, 2023 – 2024

Note for SRF and RD:
If BABA waiver, AIS
still applies

- **CDBG**

- Funds obligated before November 14, 2022
- Small Project/Award Threshold Waiver - <\$250,000
- Exigent Circumstances Waiver

Co-funded Projects

- **Cognizant Agency**
 - Federal funder with the most dollars in the project
- **National waiver coordination**
 - If the cognizant agency has a national BABA waiver, will the other federal agencies follow their waivers (or lack thereof)?

Federal Funder	Follow Cognizant Agency National Waiver(s) or Lack Thereof?
EPA (SRF)	No
USDA (RD)	No
HUD (CDBG)	No
DOI (BOR)	No
USACE (WRDA)	Assume No

- **Product-specific waivers for individual projects**
 - Each Agency must submit a waiver for the same product
- **National product waivers**
 - Products that are not made domestically or have well-established domestic sourcing challenges (e.g., SS nuts and bolts waiver under AIS)
 - TBD and hopefully apply to all federal agencies

Timeline for Applicability

- **SRF**
 - Any projects with SRF dollars must meet all portions of BABA unless the project has an EPA BABA waiver
- **RD**
 - All projects, that were initiated after February 4, 2023, must meet all portions of BABA.
- **CDBG**
 - Iron and Steel: FY23 Funds
 - Iron and Steel AND Specifically listed construction materials: FY24 Funds
 - Iron and Steel AND Specifically listed construction materials AND Not listed construction materials AND Manufactured Products: FY25 Funds