

## FINANCIAL ASSISTANCE PROGRAMS FOR LEAD MITIGATION IN SCHOOLS DRINKING WATER 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 Link	Program Contact
Highlighted programs are specific to Schools											
<b>Montana Office of Public Instruction (OPI) &amp; Montana Department of Environmental Quality (DEQ) - Lead Remediation Reimbursement Program</b>	All accredited schools and school districts in Montana	Lead remediation in school's drinking water. (fixture replacement or repair, treatment systems, and plumbing replacement)	no	yes	\$1,000 per school	NA	NA	Open-cycle	School must be participating in the Lead in School program and had lead results of 5 ug/L or greater in a water fixture. Funding is limited and is first come first serve	<a href="https://opi.mt.gov/Student-Support-Services-Department/Lead-Remediation-Reimbursement-Grants">https://opi.mt.gov/Student-Support-Services-Department/Lead-Remediation-Reimbursement-Grants</a>	Jamey Petersen, OPI 406-444-0773 Jamey.petersen@mt.gov
<b>US Environmental Protection Agency (EPA) &amp; Montana DEQ - Lead Sampling &amp; Remediation in Schools Drinking Water Grant (WIIN)</b> a. Sampling b. Remediation	a. & b. All Public School Districts	a. all public schools participating in the Lead in School Program. b. Awaiting guidance from EPA	a. no b. unlikely but awaiting guidance from EPA	a. only covers laboratory analytical costs. b. Awaiting guidance from EPA	a. Covers all initial analytical costs. B. Awaiting guidance and allocation amount from EPA	a. & b. NA	a. none b. Awaiting guidance and allocation amount from EPA	Open-cycle	a. Laboratories submit analytical invoices directly to DEQ for payment. Schools do not receive invoices or apply for reimbursement. b. Awaiting guidance and allocation amount from EPA	<a href="https://deq.mt.gov/water/programs/dw-lead">https://deq.mt.gov/water/programs/dw-lead</a>	Greg Montgomery Lead in School Rule Manager MT DEQ 406-444-5312 DEQleadinschools@mt.gov
<b>US Department of Education &amp; Montana OPI - Elementary &amp; Secondary School Emergency Relief (ESSER)</b>	All Public School Districts	Projects including reducing lead exposure in water are eligible. Lead remediation is an allowable ESSER expense, as it protects the health of students who are already in a potentially compromised state due to the presence of COVID-19 in the community.	NA	NA	Available ESSER funds vary from school to school	NA	NA	The schools have until Sept 30th to "obligate" the funds and then until November to "liquidate" the funds. ESSER I funds must be obligated by 09/30/2022, ESSER II by 09/30/2023, and ESSER III by 09/30/2024	ESSER plans can be updated at any time using OPI's District ESSER Plan Update Tool to include lead remediation costs	<a href="https://opi.mt.gov/COVID-19-Information/ESSER">https://opi.mt.gov/COVID-19-Information/ESSER</a>	Wendi Fawns, OPI 406-437-8595 Wendi.Fawns@mt.gov
<b>Montana OPI - State Major Maintenance Aid</b>	All Public School Districts	Please refer to sections 20-9-525(2), MCA. Listed provisions at the discretion of the district school board.	Local effort as defined in section 20-9-525, MCA is required to generate state major	When in compliance with sections 20-9-525 & 20-9-502(3), MCA and at the school board's discretion.	When in compliance with sections 20-9-525 & 20-9-502(3), MCA and at the school board's discretion.	NA	NA	Annual, including reserves, where in compliance with section 20-9-502(3) MCA	Refer to the document titled <i>Use of State Major Maintenance Aid for Lead Remediation</i> updated on 6/6/2022		Office of Public Instruction School Finance Division OPISchoolFinance@mt.gov
<b>U.S. Rural Development- US Department of Agriculture (USDA)</b> 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	<a href="#">Water &amp; Environmental Progr</a>	Steve Troendle USDA/Rural Development 2229 Boothill Ct. Bozeman, MT 59715 406-585-2520 <a href="mailto:steve.troendle@mt.usda.gov">steve.troendle@mt.usda.gov</a>
<b>Montana Department of Environmental Quality (DEQ)</b> a. Drinking Water State Revolving Fund Loan Program (DWSRF) Loans	a. All community public water systems.	a. Drinking water projects that achieve compliance with the Federal Safe Drinking Water Act.	No	Yes	100% of eligible project costs can be borrowed; ability to repay loan must be shown. Partial principal forgiveness may apply.	20 years or less. Qualifying disadvantaged communities are eligible for loan terms of up to 30 years and term cannot exceed the design life. Up to 3 years for interim financing.	Protect public health, comply with the Federal Safe Drinking Water Act, system affordability	Open-cycle	Projects must be included on the Project Priority List and Intended Use Plan; must demonstrate ability to repay loan. Must meet Federal Davis Bacon Wage and American Iron and Steel requirements. Minority Business Enterprise requirements MAY be required	<a href="https://deq.mt.gov/water/programs/eng#accordion1-collapse3">https://deq.mt.gov/water/programs/eng#accordion1-collapse3</a>	DEQ – State Revolving Fund 1520 E 6th Avenue PO BOX 200901 Helena, MT 59620 Mark Smith (DWSRF) 406-444-5325 <a href="mailto:marks@mt.gov">marks@mt.gov</a>
<b>Montana Department of Commerce (DOC) Community Development Block Grant Program (CDBG)</b> a. Public & Community Facility Grants b. Community Planning Grants c. Economic Development and Housing Grants (Federal grant administered by Commerce)	Incorporated cities and towns, and counties. Note: Counties may apply on behalf of water/sewer district and tribal utility authorities.	Water, wastewater, solid waste, hookup fees and assessments, economic development, housing (multifamily & single family)	a. Yes (25%) b. Yes (25%) c. Contact the program	Yes, for costs associated with engineer and grant administration.	a. Up to \$450,000 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. Quarterly c. Open-cycle	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. c. Contact the program	<a href="https://comdev.mt.gov">https://comdev.mt.gov</a>	Community Development Division Staff 301 S Park Avenue, PO BOX 200523 Helena, MT 59620 406-841-2770 <a href="mailto:doccdi@mt.gov">doccdi@mt.gov</a>
<b>Montana Department of Commerce Montana Board of Investments INTERCAP Loan Program</b> 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.	coming soon		<a href="http://www.investmentmt.com">www.investmentmt.com</a>	MT DOC Board of Investments PO BOX 200126 Helena, MT 59620 Savannah Morgan 406-444-0257 <a href="mailto:SMorgan@mt.gov">SMorgan@mt.gov</a> Louise Welsh, 406-444-0891 <a href="mailto:lwelsh@mt.gov">lwelsh@mt.gov</a>

## 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
<b>Montana Department of Commerce Montana Coal Endowment Program (MCEP)</b> 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, 50% c. Local participation required.	a. Yes, for costs associated with engineer and grant administration.	a. Up to \$750,000 b. Up to \$15,000 c. Typically, no more than \$10,000 determined on a case by case basis.	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. Apply anytime	a. Funding approved by the Legislature. b. Funding approved by Commerce. Infrastructure planning grants (PER or CIP). c. Funding approved by Commerce. Projects intended to respond to emergency situation. <a href="http://comdev.mt.gov">comdev.mt.gov</a>	<a href="http://www.comdev.mt.gov">www.comdev.mt.gov</a>  Community Development Division 301 S. Park Avenue PO BOX 200523 Helena, MT 59620 406-841-2770 <a href="mailto:doccdd@mt.gov">doccdd@mt.gov</a>
<b>American Rescue Plan Act (ARPA) Water &amp; Sewer Grants</b> a. Competitive Grants b. Minimum Allocation Grants c. Local Fiscal Recovery Funds	a. Local governments including any city, county, consolidated city-county, school district, or other political subdivision of local government body of the state, regional water authority, water district, sewer district, irrigation district, water users association, conservation district, or tribal government b. and c. Counties and certain	Must be eligible under the Drinking Water State Revolving Fund or Clean Water State Revolving Fund and be a necessary investment in water or sewer infrastructure projects	a. No, but points are added for contribution b. Yes, 50% match or 25% of ARPA Local Fiscal Recovery Funds amount	Yes	a. Up to \$2,000,000 b. and c. Varies by community – check <a href="http://arpa.mt.gov">arpa.mt.gov</a> for amounts	Not Applicable	a. Eligible applicant, eligible project, necessary investment, health-based standards, readiness to proceed, affordability, and match b. Eligible applicant, eligible project c. Eligible entity, eligible project	a. Applications due January 14, 2022 b. Applications are reviewed monthly, but deadline is January 1, 2023 c. all funds must be spent before end of 2026	Funds are awarded by the governor For more information, visit: <a href="http://arpa.mt.gov">arpa.mt.gov</a>	<a href="https://arpa-mtdnrc.hub.arcgis.com/">https://arpa-mtdnrc.hub.arcgis.com/</a>  Visit <a href="http://arpa.mt.gov">arpa.mt.gov</a> for program contacts
<b>TECHNICAL ASSISTANCE PROVIDERS</b>										
<b>Midwest Assistance Program (MAP)</b> Provides free technical assistance for water, wastewater, and solid waste needs	Accredited schools participating in the Lead in school program	Program setup (inventories, history forms, and flushing plans)	No cost to schools	N/A	N/A	N/A	N/A	N/A	<i>Schools in need of assistance with their sampling program setup (inventories, forms and flushing forms) can request assistance from DEQ. Either MAP or Rural Water will be assigned based on availability</i>	Greg Montgomery Lead in School Rule Manager MT DEQ 406-444-5312 <a href="mailto:DEQleadinschools@mt.gov">DEQleadinschools@mt.gov</a>
<b>Montana Rural Water Systems</b> Water & Waste Water Technical Assistance and Training, Source Water Protection - USDA EPA Water Training, Septic, and Wastewater Program	Accredited schools participating in the Lead in school program	Program setup (inventories, history forms, and flushing plans)	No cost to schools	N/A	N/A	N/A	N/A	N/A	<i>Schools in need of assistance with their sampling program setup (inventories, forms and flushing forms) can request assistance from DEQ. Either MAP or Rural Water will be assigned based on availability</i>	Greg Montgomery Lead in School Rule Manager MT DEQ 406-444-5312 <a href="mailto:DEQleadinschools@mt.gov">DEQleadinschools@mt.gov</a>