

Glossary

Additional subsidization: Awards with better (“additional”) financing terms that do not need to be repaid. Additional subsidization comes in three forms:

- 1) **Grants** – An award of financial assistance that does not have to be repaid.
- 2) **Principal Forgiveness (PF)** – Assists applicants to reduce the size of an SRF loan by forgiving a portion of the loan. While PF works similarly to a grant, it does not follow federal grant reporting requirements, therefore reducing administrative costs. States develop criteria to determine which projects qualify for principal forgiveness.
- 3) **Negative Interest Loans** – A negative interest rate reduces the total repayment amount —this is uncommonly used by states.

Affordability Criteria: This term applies to requirements of the Clean Water State Revolving Fund and is used to identify economically disadvantaged municipalities based on income data, unemployment, and population trends. Applicants who meet a state’s affordability criteria may receive additional benefits for their projects, including longer loan terms, lower interest rates, higher priority ranking, and/or additional subsidization in the form of principal forgiveness or grants.

Authorization: [Congressional authorization](#) establishes or continues the authority for agencies to conduct programs or activities.

Appropriation: Funding is made available to federal programs and activities through an appropriations act, which details the specific funding level for each federal agency and its programs. Sometimes Congress enacts supplemental appropriations acts. It is possible for some laws, like the [Bipartisan Infrastructure Law](#), to both authorize *and* appropriate funds for programs.

Bipartisan Infrastructure Law (BIL): This law, also known as the Infrastructure Investment and Jobs Act (IIJA), was passed in November 2021 and authorized investments in dozens of existing and new programs across federal agencies to address aging infrastructure, including roads and transportation, water, broadband, energy, airports and ports, and cyber security infrastructure, along with investments in environmental pollution cleanup programs.

Capitalization Grants: Federal grants awarded by EPA to a state, tribe, or territory to cover part of their revolving funds. These grants “[establish permanent financing institutions in each state to provide continuing sources of financing](#)” for water infrastructure projects.

Capital Improvement Plan: Capital improvement plans list all planned projects, equipment purchases, and major planning / engineering studies of a utility or municipality. These implementation plans provide a working blueprint for sustaining and improving the community infrastructure and typically include information about construction timeframes, and financing and funding needs.

Clean Watersheds Needs Survey: The EPA conducts this survey once every four years in collaboration with states, territories, and DC to assess the capital improvement needs for wastewater and stormwater treatment and collection systems. The results of the assessment are reported to Congress and state legislatures and include information on publicly owned wastewater collection and treatment facilities; stormwater and combined sewer overflows control facilities; nonpoint source pollution control projects; and decentralized wastewater management. Learn more [here](#).

Community Benefits Agreement (CBA): A legally binding, enforceable contract that is negotiated between a developer and an impacted community that explains how the developer will create opportunities for local workers, mitigate environmental and/or public health harm, and otherwise positively contribute to the local community.

Community Workforce Agreement (CWA): A tool used to maximize project benefits in a local community through collective bargaining agreements, local hire provisions, measures to hire low-income and disadvantaged workers, and developing pre-apprenticeship pathways.

Disadvantaged Communities (DACs): This term applies to requirements of the Drinking Water State Revolving Fund, though other federal and state programs may use the term too, potentially with different definitions. For the DWSRF, states are required to explain how they define “disadvantaged community” and must use this definition to identify applicants serving DACs. If a community is identified as a DAC, they may receive additional benefits for their projects, including longer loan terms, lower interest rates, higher priority ranking, and/or additional subsidization in the form of principal forgiveness or grants. The Bipartisan Infrastructure Law added additional parameters regarding how much SRF funding must go to DACs.

Drinking Water Infrastructure Needs Survey and Assessment: The EPA conducts this survey once every four years in collaboration with states, territories, and community and noncommunity water systems to project drinking water system needs for the next 20 years. The results of the assessment are reported to Congress and are the basis for determining how much DWSRF money is distributed to states, tribes, and territories.

Emerging Contaminants: “Substances and microorganisms, including manufactured or naturally occurring physical, chemical, biological, radiological, or nuclear materials, which are known or anticipated in the environment, that may pose newly identified or re-emerging risks to human health, aquatic life, or the environment.” ([US EPA](#))

Green Stormwater Infrastructure (GSI): Refers to the practice of using nature-based water management techniques that protect, restore, or mimic the natural water cycle as a means of preventing flooding, improving ecosystem health, and offering many other community benefits, it looks pretty! Examples of green stormwater infrastructure include bioretention techniques such as rain gardens and bioswales (vegetated channel), which use amended soil and native plants to capture, retain, and slowly infiltrate rain drops where they fall.

The EPA defines GSI as “a wide array of practices at multiple scales that manage wet weather and that maintain and restore natural hydrology by infiltrating, evapotranspiring and harvesting and using stormwater. On a regional scale, green infrastructure is the preservation and restoration of natural landscape features, such as forests, floodplains, and wetlands, coupled with policies such as infill and redevelopment that reduce overall imperviousness in a watershed. On the local scale green infrastructure consists of site- and neighborhood-specific practices, such as bioretention, trees, green roofs, permeable pavements, and cisterns.”

Intended Use Plan (IUP): Each state creates an annual IUP describing the state’s process for ranking projects for selection, set-aside activities, how they have defined and prioritized disadvantaged communities (DACs) for the DWSRF and affordability criteria for the CWSRF, and a list of all projects seeking funding in the next fiscal year (the project priority list).

Natural Infrastructure: Environmental and Energy Study Institute (EESI) defines [natural infrastructure](#) as, “Projects that use existing or rebuilt natural landscapes (i.e., forests, floodplains, and wetlands) to increase resilience to climate impacts, often resulting in environmental, economic, and social co-benefits.”

Nonpoint source pollution: Pollution that is generated from a widespread source, such as excess fertilizer on grass and farms, as opposed to a specific point, such as a pipe from a factory. Nonpoint source pollution exacerbates water quality problems and can be difficult to track due to their dispersed nature. Nonpoint source pollution negatively affects drinking water supplies, fisheries, and wildlife.

PFAS: Per- and polyfluoroalkyl substances, often referred to as “forever chemicals” since they do not break down easily and accumulate over time, are human-made chemicals that can contaminate drinking water (along with air, food, and soil).

Project Priority List (PPL): The list of projects a state intends to fund. Projects are prioritized based on ranking criteria. Projects are ranked based primarily on if they address the most serious risks to human health; are necessary to ensure compliance with the requirements of the Clean Water Act or Safe Drinking Water Act; and assist systems most in need. States have different approaches to project ranking. The number of points used varies by state (i.e., New Jersey’s DWSRF projects can get a maximum 3,226 points, while Indiana’s DWSRF projects can receive up to 100 points). PPLs may be updated multiple times a year.

Resilience: Refers to a community’s ability to adapt to changing conditions and recover from a disruptive event.

Safe Drinking Water Act (SDWA): This Act became law in 1974 to regulate the nation’s drinking water and source water. It was amended twice, in 1986 and 1996, and the 1996 amendments established the Drinking Water State Revolving Fund. The EPA uses the SDWA to regulate contaminants found in drinking water and works with water systems and states to ensure standards are met. Learn more [here](#).

Technical Assistance (TA): Targeted support that external experts or consultants provide to ensure a project application, process, or outcome is achieved. Technical assistance may include financial, legal, engineering, communications, grant writing, environmental assessments, and other services, including community engagement. Applicants and recipients can receive TA prior to preparing an SRF application, during the application process, and while the project is underway.

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Additional resources are included on the final page of the Technical Assistance section and are not reproduced here.

Table 1. How Much Money Does Each State and Territory Receive?

DWSRF	CWSRF
<p>The Drinking Water Infrastructure Needs Survey and Assessment conducted every four years by the EPA determines the amount of funds allocated to each state and Puerto Rico. Tribes and territories are allotted a specific percentage of national funds prior to states' allotments.</p>	<p>The amount of funds allocated to each state, DC, and US territories are determined through a water quality needs formula, unrevised since 1987. The formula has been criticized by advocates, states, and legislators as arbitrary and opaque, and the Senate Environment and Public Works Committee could pursue options for updating the formula. A periodic Clean Watersheds Needs Survey conducted by the EPA could be a helpful tool in updating the CWSRF formula. Tribes are allocated a specific percentage through a statutory set-aside.</p>
<p>States receive at least 1% of total DWSRF dollars as a minimum share.</p>	<p>States receive at least .5% of total CWSRF dollars as a minimum share.</p>
<p>Between FY2017 and FY2021, annual appropriations acts have provided an average of \$1.1 billion in DWSRF appropriations per fiscal year.</p>	<p>Between FY2017 and FY2021, annual appropriations acts have provided an average of \$1.6 billion in CWSRF appropriations per fiscal year.</p>
<p>Use the EPA's interactive 2022 Clean Water and Drinking Water State Revolving Funds tool to see estimated funding for each state, tribe, and territory from the Infrastructure Investment and Jobs Act. More details on BIL investments in drinking water and wastewater infrastructure can be found in the Congressional Research Service report. A report by EPA in 2016 demonstrates the need to update the Clean Water SRF needs formula to distribute funds using up-to-date data.</p>	

Table 2. EPA's Equity Action Plan

President Biden's [Executive Order 13985](#) directed EPA and other federal agencies to identify how underserved/disadvantaged communities are systemically barred from accessing benefits and opportunities provided through agency programs and policies. Federal agencies developed Equity Action Plans in response to the executive order. [EPA's Plan](#) specifically identifies the CWSRF and DWSRF as programs that will implement the Justice40 initiative, which aims to allocate at least 40% of EPA's investments towards benefits for disadvantaged communities. The Plan says that EPA will "Ensure that funds appropriated to EPA through the Infrastructure Investment and Jobs Act, signed into law on November 15, 2021, exceed the goals of the Justice40 initiative."

How will we know if EPA is achieving this goal?

Advocates should communicate with EPA about how their states are defining DAC and affordability criteria, and how they are allocating priority points, how states and the EPA are tracking funding disbursement, and ensuring community-based organizations are funded to build their capacity to have a seat at the table when it comes to communicating about community concerns and solutions.

Track: In November 2023, EPA is required to submit a report to congressional committees of an analysis of CWA and SDWA programs to identify the historical distribution of funds to small and disadvantaged communities, along with recommendations for improved methods for distribution.