

# Texas Water Development Board State Revolving Fund Project Information Form Guidelines

## Introduction

The Texas Water Development Board (TWDB) appreciates your interest in the State Revolving Fund (SRF) program. The Clean Water State Revolving Fund (CWSRF) program assists communities by providing below market rate financing for a wide range of wastewater, stormwater, and pollution control projects. The Drinking Water State Revolving Fund (DWSRF) provides below-market rate financing for water system projects in compliance with the Safe Drinking Water Act. We look forward to your participation.

The Infrastructure Investment and Jobs Act (IIJA) appropriated additional funds for the State Revolving Fund programs, including appropriations that are available for “all eligible activities” in the SFY 2027 Intended Use Plan (IUP). **Note: this solicitation does not cover any allotments to Texas under the special IIJA appropriations covering Emerging Contaminants or Lead Service Line Replacements. It is for general or “all eligible activities.”**

## PIF Submission Options

**The current solicitation is for SFY2027.** The deadline to submit a Project Information Form (PIF) for inclusion in the initial SFY 2027 IUPs is: **March 6, 2026, at 5:00 p.m. CST.**

For all PIF submissions, entities must submit a complete PIF using either the TWDB’s Online Loan Application (OLA) system or email a downloaded Word version. Please note that submitting your application in OLA is the preferred method of submission. All PIF scoring will undergo a public review process and then be included on the CWSRF IUP or DWSRF IUP Project Priority List (PPL). Applicants whose projects rank within funding capacity will be invited to submit a complete financial application for funding. An applicant may not submit a financial application unless it has received an invitation from TWDB.

If you need assistance filling out your PIF, go to TWDB’s [State Revolving Fund Project Information Forms](#) webpage, and click on the link to our instructional video called “[How to fill out a Project Information Form](#)” that is located at the top.

## Online Loan Application

TWDB prefers that you submit your PIF(s) through our [Online Loan Application \(OLA\) system](#). You will need to create a username and password. Your username must be your email address and needs to be the same email address that you use in the “PIF Roles” section of the PIF. This ensures that all PIFs you create in OLA will appear on your Dashboard. You will receive an automatic confirmation email from OLA when you submit your PIF.

## Email

You can find a link to the Word version of the PIF in the current solicitation notice. You can also find it on our [State Revolving Fund Project Information Forms](#) webpage under the respective program’s drop-down menu. If you choose to email the Word version of the PIF, make sure all sections are filled out and complete. If you are seeking disadvantaged community funding, you must include a completed Disadvantaged Community Worksheet with your PIF.

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Email the Word version of the PIF to the respective programs at [CWSRF@twdb.texas.gov](mailto:CWSRF@twdb.texas.gov) or [DWSRF@twdb.texas.gov](mailto:DWSRF@twdb.texas.gov). The subject line of your email needs to include what program you are applying for and Entity Name. The file size must be 10MB or smaller; if larger please contact TWDB at the emails listed above.

Once your PIF is received, it will be entered into OLA, and you will be contacted via email to review the PIF in OLA for accuracy and completeness. **You are responsible for entering any missing information into OLA. You are also responsible for submitting your PIF in OLA.**

## Updates to Previous PIFs

If you are not invited to apply or if you are invited and choose not to apply, your project may be “rolled forward” into the next funding cycle in OLA. You must update any PIF submitted in a previous funding cycle to be included in the next Intended Use Plan. At a minimum, you must update: (1) the readiness to proceed information, (2) estimated costs section, and, if seeking disadvantaged community eligibility, (3) the Disadvantaged Community Worksheet.

To roll your PIF forward, email the request to [DWSRF@twdb.texas.gov](mailto:DWSRF@twdb.texas.gov) or [CWSRF@twdb.texas.gov](mailto:CWSRF@twdb.texas.gov). You must provide your previous PIF number and entity name in the request. TWDB will change the state of your PIF to roll-forward-eligible. Once this change is made, you will receive an email from OLA that your PIF is roll-forward-eligible and available to update. Once all sections of your PIF have been updated, submit your PIF. **If you do not submit your PIF, it will not be considered for the upcoming SFY.**

## How to Reduce Errors When Submitting Your PIF in OLA

**Intro Section:** Select the correct State Fiscal Year (SFY) for your PIF. **The current solicitation is for SFY2027.**

\* Return to previous screen

PIF

• Intro \*

• PIF Roles

• PIF Type

Welcome to the Texas Water Development Board's (TWDB) online State Revolving Fund (SRF) Project Information Form (PIF) and State Water Implementation Fund for Texas (SWIFT) Abridged Application.

Editing (OLA)

SRF PIF

At the time of submission, SRF PIFs will be reviewed for eligibility, rated, ranked, and added to the current or upcoming Project Priority List, depending on the State Fiscal Year (SFY) selected below. subsidies in the form of principal forgiveness may be available for entities that qualify as disadvantaged communities and for projects with green components. The Drinking Water State Revolving Fund includes principal forgiveness for Very Small Systems and Urgent Need projects. The principal forgiveness is generally allocated to projects on the initial Project Priority List.

**ATTENTION:** The release of the U.S. Census 2024 American Community Survey (ACS) 5-year estimates data that will be used to determine an entity's Disadvantaged Community eligibility has been delayed due to the federal government shutdown in the fall of 2025 and will not be available in OLA until early February 2026. Entities who are seeking Disadvantaged Community eligibility should complete sections of their PIFs in OLA except for the "Disadvantaged Community p2B" page and keep their PIFs in the "In\_Progress" status. Once the 2024 ACS 5-year estimates data is available in OLA, the TWDB will send out an email notification to all email addresses associated with PIFs in the "In\_Progress" status, notifying entities that the data is available and the PIFs can be completed and submitted.

Deadlines associated with program subsidies will be posted to our website, however entities may submit their PIF at any time throughout the year to be considered for funding.

**SWIFT Abridged Application**  
SWIFT Abridged Applications will be accepted during invitation periods posted on the TWDB agency website. Abridged Applications provide the information required for TWDB staff to conduct prior as described in 31 TAC §363.1303, utilizing the criteria found in §363.1304.

The TWDB will continue to accept paper PIFs and Abridged Applications. If you prefer to submit in paper form, please click [here](#), and navigate to the appropriate program for information.

Clean Water State Revolving Fund - [CWSRF@twdb.texas.gov](mailto:CWSRF@twdb.texas.gov)

Drinking Water State Revolving Fund - [DWSRF@twdb.texas.gov](mailto:DWSRF@twdb.texas.gov)

State Water Implementation Fund for Texas - [SWIFT@twdb.texas.gov](mailto:SWIFT@twdb.texas.gov)

Please select the SFY for this PIF: 2027

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# Texas Water Development Board State Revolving Fund Project Information Form Guidelines

## General Information Section (Entity Name):

- Type your entity name in the Entity Name box and select your entity name from the yellow highlighted drop-down menu. If you do not select from the drop-down menu, OLA will not recognize your entity name, and it will create an error when processing your PIF.
- If you have never requested funding from the TWDB or if you are a newly created entity, then put your entity name in the New Entity Name box.
- If you are a city, **do not type “City of,”** in the Entity Name box or it will create an error when processing your PIF. Only type the actual city name in the Entity Name box. *Example:* the City of Austin will type “Austin” in the Entity Name box for the name to appear in the yellow highlighted drop-down menu. Select the entity name from the yellow highlighted drop-down menu.

The screenshot shows the 'General Information' section of a form. The 'Entity Name' field is active, and a dropdown menu is open, displaying a list of entity names. The first item, 'Austin', is highlighted in yellow. Other items include 'Austin Co DD # 1', 'Austin Co S&W CD', 'Austin County', 'Austin County WSC', 'Austin Highway WSC', 'Austin ISD', 'Austin MUD # 1', 'Austin MUD # 2', 'Austin MUD # 3', 'Maple Run at Austin MUD', and 'North Austin MUD # 1'. The 'New Entity Name' and 'County \*' fields are also visible but empty.

## General Information Section for DWSRF Projects (PWS ID No.):

- Put “TX” in front of the PWS ID No. OLA will not recognize the PWS ID No. without “TX” and it will create an error when processing your PIF. If you do not know your PWS ID No., go to [Drinking Water Watch](#) to obtain this information.

The screenshot shows the 'General Information' section for DWSRF Projects. The 'Entity Name' field contains 'Austin'. The 'PWS ID No.' field contains 'TX2270001', with 'TX' highlighted in yellow. The 'New Entity Name' and 'County \*' fields are empty. The 'CCN No.' field is also empty. The text 'Editing (OLA #16)' is visible in the top right corner.

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**Service Area Information Section:** enter your Population Served and Total Household Connections. This information is used to determine your eligibility for principal forgiveness. This information needs to be the population and connections served by your ENTIRE system, and not just the project area.

The screenshot shows the 'Service Area Information' section of a web form. At the top right, it says 'Editing (OLA #16590!)'. Below the title, there is a blue link: 'Submit a map of the entity's current and, if applicable, proposed service area(s)'. Underneath is a row of three buttons: '+ Upload', '\* View', and 'Delete'. A note below the buttons states 'Only PDFs are allowed'. A large text box contains instructions on how to determine population served, with two bullet points. The first bullet point is for incorporated entities (cities or towns) and the second is for unincorporated entities (counties, districts, etc.). At the bottom of the form, there are two input fields: 'Population Served' and 'Total Household Connections'. The 'Total Household Connections' field has the number '0' entered.

**Service Area Information** Editing (OLA #16590!)

[Submit a map of the entity's current and, if applicable, proposed service area\(s\).](#)

[+ Upload](#) [\\* View](#) [Delete](#)

Only PDFs are allowed

To determine population served:

- For an incorporated entity (i.e., a city or town), indicate the number of people who reside within the service area of, or receive wholesale or retail water service from, the entity based on the most recent data available from the [American Community Survey 5-year Estimates](#).
- For an unincorporated entity (i.e., a county, district, river authority, system, or corporation), indicate the number of people who reside within the service area of, or receive wholesale or retail water service from, the entity based on the most recent data available from the U.S. Census Bureau. Provide a table that 1) identifies the number of household connections within each block group that covers the entity's service area and 2) prorates the population accordingly. See example table in Census Data Search (WRD-284). The map of the service area must be overlaid by a map of the census boundary(ies) identified in the table.

Population Served

Total Household Connections

## Project Description Section:

- Be sure to include all relevant information about the project you are proposing.
- Check your description for spelling and grammar errors and make those corrections before submitting your PIF. Otherwise, errors may show up on the project priority list.
- Respond Yes or No to whether the proposed project is Urgent Need (i.e., Emergency Relief). You can find information about this funding in our guidance document "[Urgent Need Funding from the Drinking Water State Revolving Fund](#)." The funding and limitations are the same under the CWSRF program.

## Rating Criteria for All Projects – Effective Management Section:

- **Asset Management Plans** will be considered “**within the past 5 years**” if they are adopted within a 5-year (60 month) window prior to the date the PIF is submitted. Boiler plate ordinances will not be considered a sufficient plan. **Information and plans not submitted as requested in your PIF will not be considered for scoring and ranking.**
- **Water Conservation Plans** will be considered “**within the past 5 years**” if they are adopted within a 5-year (60 month) window prior to the date the PIF is submitted. **Information and plans not submitted as requested in your PIF will not be considered for scoring and ranking.**

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- **Implementation of Water Plans** - If your project implements elements contained in a water plan, you must attach the requested documents for the plan to be considered. **Information and plans not submitted as requested in your PIF will not be considered for scoring and ranking.**
- **Cybersecurity Awareness Plans** will be considered “**within the past 5 years**” if they are adopted within a 5-year (60 month) window prior to the date the PIF is submitted. **Information and plans not submitted as requested in your PIF will not be considered for scoring and ranking.**
  - **Cybersecurity Awareness Plans should contain, but are not limited to (1) a risk assessment and needs analysis, (2) policies and procedures, (3) training modules, (4) testing and simulations, (5) incident reporting mechanisms, and (6) monitoring, metrics, and evaluation.**

**Estimated Costs Section:** select the box under the correct phase(s) for the funding you are requesting for the fiscal year (first row of the table). For each phase that an estimated cost is entered for, the check box for that phase must be marked. OLA will not check those boxes automatically; you must do that. Errors in your cost estimate could affect what eligible phases and eligible costs your PIF is considered for, so please double-check the amounts you have entered.

## Estimated Costs

If a cost category is not enabled, but you believe it should be, please return to [Project Description](#) to enable it.

Cost Category	(a) Planning	(b) Acquisition	(c) Design	(d) Construction
Check the phase(s) for which DWSRF funding is desired during the fiscal year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Treatment	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Transmission and Distribution	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Source	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Storage	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Purchase of System	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>
Restructuring	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>

**Disadvantaged Community Section:** You must provide the geographic boundaries that represent your service area (or project area, only if the project is providing first-time centralized water or wastewater service to existing residents in currently unserved areas), total household connections, and water and/or sewer rates. If you do not have water and/or sewer rates, then it is acceptable to check the “NA” box. Please note that once you have selected the geographic boundaries in this section, you still need to enter the number of household connections served in each of those boundaries.

Incomplete information will result in OLA not accurately calculating your Estimated Principal Forgiveness. More information on eligibility is provided below in the Disadvantaged Community Funding Option Eligibility section.

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**CWSRF Program**

**Eligible Applicants**

- Wastewater treatment management agencies, including interstate agencies and water supply corporations that have been designated and approved as a management agency in the Texas Water Quality Management Plan,
  - Cities, commissions, counties, districts, river authorities, or other public bodies created by or pursuant to state law that have authority to dispose of sewage, industrial waste, or other waste,
  - Intermunicipal, interstate, or State agencies,
  - Authorized Indian tribal organizations, and
  - Private entities for nonpoint source projects or estuary projects only.
- (A water supply corporation that has been designated and approved as a management agency in the Texas Water Quality Management Plan is considered a “municipality” and is therefore eligible for funding for Publicly Owned Treatment Works and other activities.)

**Examples of Eligible Projects**

CWSRF program funding can be used for the planning, acquisition, design, and construction of projects to:

- Create or improve wastewater treatment facilities, reuse/recycle facilities, and collection systems
- Purchase existing wastewater treatment plants
- Control nonpoint source pollution, including acquisition of conservation easements and permanent or long-term acquisition of water rights by entities eligible under state law that will result in a substantial public water quality benefit
- Manage estuaries
- Implement green projects (pursuant to EPA guidance)
- Pay for other costs necessary to secure or issue debt
- Purchase land necessary for construction on an eligible project
- Manage, reduce, treat, or recapture stormwater or subsurface drainage water
- Reduce the demand for publicly owned treatment works capacity through water conservation, efficiency, or reuse (for a municipality or intermunicipal, interstate, or State agency only)
- Develop and implement watershed pilot projects
- Reduce the energy consumption needs for publicly owned treatment works (for a municipality or intermunicipal, interstate, or State agency only)
- Re-use or recycle wastewater, stormwater, or subsurface drainage water
- Increase the security of publicly owned treatment works
- Water meters as a water conservation measure (to address, for example, water loss if a utility’s total water loss meets or exceeds the threshold established in TWDB rules.)

**Examples of Ineligible Projects**

- Projects primarily intended to facilitate growth

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- Publicly Owned Treatment Works (POTW) (as defined in Section 212) projects for systems that are owned by a private entity or any other entity that is not considered a municipality or intermunicipal, interstate, or State agency
- Treatment works owned or operated by a federal agency
- Excavation, testing, remediation, or disposal of hazardous, contaminated, or potentially contaminated material

**How CWSRF Projects Are Rated**

Each submitted project is rated by TWDB based on the following:

- Publicly Owned Treatment Works (POTW) and other projects eligible under Federal Water Pollution Control Act Sections 603(c)(4)-(11) are rated based on:
  - Addressing existing enforcement action
  - participation in TCEQ Sanitary Sewer Overflow (SSO) plan
  - capacity factors,
  - environmental compliance factors,
  - service to unserved areas,
  - innovative or alternative technology factors,
  - impact on stream segments,
  - recycling/reuse,
  - addressing stringent effluent limits,
  - providing technical assistance, and
  - regional service factors.
- Non-Point Source (NPS) projects are rated based on:
  - public health factors,
  - impact on groundwater,
  - implementation of watershed protection plans,
  - inclusion of low impact development, and
  - impaired water body factors.
- Estuary management projects are rated based on implementation of Coastal Bend Bays & Estuaries Program or the Galveston Bay Estuary Program objectives.
- ***All projects*** are rated by TWDB on asset management, water conservation, energy efficiency, implementation of water plans, and affordability factors. Each rated project is placed on a priority ranked list, which the TWDB uses to develop the IUP and to establish a Project Priority List.

**Cost Categories in the CWSRF Program**

Cost categories are associated with the Estimated Costs section of the PIF (Section 13 in the Word version of the PIF). A description of each cost category is below:

- A. **POTW Project – Treatment Project** - Includes any of the following: construction or rehabilitation for processes at a wastewater treatment plant (i.e., screening, grit removal, aeration, disinfection, filtration, treatment waste handling, chemical feed and storage, etc.), expansion of hydraulic capacity at a WWTP,

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expansion of solids treatment or handling at a WWTP, construction or rehabilitation of linework and processes to allow reuse of reclaimed wastewater or stormwater.

- B. **POTW Project – Collection Project** – Includes any of the following collection system improvements including construction or rehabilitation of sewer lines (e.g., transmission, trunk or relief lines), construction or rehabilitation of manholes, construction or rehabilitation of lift stations, and installation of stormwater treatment and/or control.
- C. **NPS Project** – Includes any of the following pollution control projects for sources of water pollution that do not enter from a point source, including land runoff, precipitation, atmospheric deposition, drainage, seepage, or hydrologic modification, project may involve stormwater projects.
- D. **Estuary Management Project** – includes projects that implement objectives of Coastal Bend Bays & Estuaries Program or the Galveston Bay Estuary Program.



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## **DWSRF Program**

### **Eligible Applicants**

- Existing community public water systems including political subdivisions, nonprofit water supply corporations, and privately-owned community water systems
- Nonprofit, non-community, public water systems
- State agencies

### **Examples of Eligible Projects**

DWSRF program funding can be used for the planning, acquisition, design, and construction of projects to:

- Correct water system deficiencies including water quality, capacity, pressure, and water loss
- Upgrade or replace water systems
- Provide new or existing water service to other water systems through consolidation projects
- Purchase capacity in water systems
- Purchase water systems
- Implement green projects (pursuant to EPA guidance)
- Implement source water protection projects
- Pay for other costs necessary to secure or issue debt

### **Examples of Ineligible Projects**

- Projects primarily intended to facilitate growth
- Construction of reservoirs
- Dams or rehabilitation of dams
- Projects for systems in significant noncompliance, unless funding will ensure compliance
- Projects for systems that lack adequate financial, managerial, and/or technical (FMT) capability, unless assistance will ensure compliance
- Routine laboratory fees or ongoing operational expenses
- Fire protection projects (unless incidental to the main project scope)

### **How DWSRF Projects Are Rated**

Proposed eligible projects (except for source water protection projects) are rated by the Texas Commission on Environmental Quality (TCEQ) and are given a Combined Rating Factor. The Combined Rating Factor is based on health and compliance factors, physical deficiency factors, and consolidation factors.

*All projects* are rated by TWDB on asset management, water conservation, energy efficiency, implementation of water plans, and affordability factors. Each rated project is placed on a priority ranked list, which the TWDB uses to develop the IUP and to establish a Project Priority List.

### **Cost Categories in the DWSRF Program**

Cost categories are associated with the Estimated Costs section of the PIF (Section 10 in the Word version of the PIF). A description of each cost category is below:

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- A. **Treatment** - Includes any of the following: disinfection, filtration, treatment waste handling, and any other treatment (i.e., GAC, aeration, iron/manganese removal, chemical storage tanks, and sedimentation).
- B. **Transmission and Distribution** - Includes raw and finished water transmission, distribution lines, valves, back flow prevention, water meters, and/or pumping stations.
- C. **Source** - Includes wells, wellhead pumps, and surface water intakes.
- D. **Storage** - Includes elevated, ground, and pressure tanks for finished/treated water.
- E. **Purchase of Systems** -Includes all of the eligible costs funded by the DWSRF to purchase systems (e.g., as part of a consolidation/regionalization project).
- F. **Restructuring** - Includes costs associated with changes in organizational structure, management, accounting, rates, or other procedures conducted to meet financial, managerial, and technical requirements.
- G. **Land Acquisition** - Includes eligible costs funded by the DWSRF to acquire land.
- H. **Source Water Protection** - Includes costs associated with implementing source water protection BMPs.

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**Principal Forgiveness Funding Options Under the SRF Programs:**

Funding capacity and additional subsidization allocations are determined on an annual basis and are detailed in the Intended Use Plan. Additional subsidization is anticipated to be available in the form of principal forgiveness for the following:

**Disadvantaged Communities** - The community must meet the SRF program's affordability criteria based on income, unemployment rates, and population trends. The amount of principal forgiveness for a regular disadvantaged project (up to 70%) is dependent on the Annual Median Household Income (AMHI) and household cost factor (HCF) for the project area.

**Disadvantaged Community – Small / Rural only** - An entity qualified as a disadvantaged community and additionally meets the definition of either a small community (serve a population of 10,000 or fewer) or a rural project (see definition in the IUP) are eligible for up to 100% principal forgiveness (\$1,000,000 maximum).

**Very Disadvantaged Community** - An entity qualified as a disadvantaged community and their service area AMHI is below 50% of the state-wide average AMHI.

**First-Time Service** - Project involves connection of households that are currently not served by a water or wastewater utility to a centralized water or wastewater system.

**Green Projects** – Entities may receive principal forgiveness if their project has elements that are considered green and the cost of the green portion of their project is at least 30% of the total project cost. Principal forgiveness of up to 15% of the total eligible green component costs funded through the SRF program may be available. Maximum limits may apply. See the current IUP for more details.. More information is provided in [TWDB-0162 CWSRF Green Project Worksheets](#) and [TWDB-0163 DWSRF Green Project Worksheets](#).

A questionnaire will be sent via email to applicants who indicate their project contains green elements. This questionnaire will allow applicants to provide additional information regarding the green elements of their project. The questionnaire must be completed as part of the PIF review.

**Categorical eligible green projects** include the following (screenshot from questionnaire):

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This Project is applying for **Categorical Eligible** green project. (Select **one** of the categories listed below, see TWDB-0161 for additional descriptions and examples). \*

- ☐ **Green Infrastructure.** (Examples: Pervious/porous pavement; Bioretention; Green roofs; Rainwater harvesting; Gray water use; Retrofitting existing irrigation systems with moisture/rain sensing equipment.)
- ☐ **Water Efficiency.** (Examples: Installing water efficient devices; Installing new water meters; Replacing water meters; Conducting water utility audits; Developing conservation plans; Water reuse projects; Retrofitting/replacing existing irrigation systems with moisture/rain sensing equipment.)
- ☐ **Energy Efficiency.** (Examples: Renewable energy projects; Utility energy management planning).
- ☐ **Environmentally Innovative.** (Examples: Total water resources management planning; Utility sustainability plan; Greenhouse gas inventory or mitigation plan; Source water protection implementation projects; Construction of LEED certified buildings.)

**Business case eligible green projects** include the following (screenshot from questionnaire):

This Project is applying for **Business Case** green project. (Select **one** of the categories listed below, see TWDB-0161 for additional descriptions and examples). \*

- ☐ **Green Infrastructure.** (Examples: Green infrastructure designed to mimic natural hydrologic conditions; Projects that capture/treat stormwater where it falls; Supplement municipal hard/grey infrastructure.)
- ☐ **Water Efficiency.** (Examples: Water meter replacement with traditional water meters; Distribution pipe replacement; Storage tank replacement/rehabilitation; New water efficient landscape irrigation system where there is not currently one.)
- ☐ **Energy Efficiency.** (Examples: Retrofit/Upgrade new pumping systems [VFDs]; Cost effectively eliminate pumps or pump stations; Upgrading lighting to energy efficiency sources; Substantial energy savings with use of automated and remote control systems [SCADA].)
- ☐ **Environmental Innovative.** (Examples: Educational activities/demonstration projects for water/energy efficiency; Projects that achieve goals of utility asset management plans; Projects that significantly reduce or eliminate use of chemicals; Use of recycled materials in construction.)

Project elements that **do not qualify** as “green” include the following (screenshot from questionnaire):

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By checking each of the four boxes below, I acknowledge that the following project component category examples **do not meet** the EPA's Green Project Reserve guidance eligibility requirements (see TWDB-0161 for additional information)." \*

Please select 4 options.

- ☐ **Green Infrastructure:** Stormwater controls with impervious liners and no harvesting function; Stormwater ponds serving as extended detention; In-line/end-of-pipe treatment for only filter or detain stormwater; Stormwater conveyance systems that are pipes or concrete channels.
- ☐ **Water Efficiency:** Covering open finished water reservoirs.
- ☐ **Energy Efficiency:** Replacing a pump or other equipment because its at the end of its useful life with something of average efficiency.
- ☐ **Environmentally Innovative:** Higher sea walls to protect from sea level rise.

**Very Small Systems** – Projects that serve a population of 1,000 or fewer are eligible for up to 100% principal forgiveness (\$400,000 maximum). The entity's annual median household income (AMHI) for the project area must not exceed 150 percent of the state's AMHI.

**Urgent Need** – Entities may receive principal forgiveness to address situations that require immediate attention to protect public health and safety. If a project is determined to be of urgent need, the applicant may qualify for 100% principal forgiveness (\$500,000 maximum unless a disadvantaged community, then up to \$800,000 maximum).

There are **limitations** to urgent need funding. The proposed project **must not be for** replacement of facilities that have failed because they exceeded their useful life or failed due to lack of adequate maintenance. You can find information about this funding in our guidance document "[Urgent Need Funding from the Drinking Water State Revolving Fund](#)." The funding and limitations are the same under the CWSRF program. *Note: This is the same funding as Emergency Relief in the Texas Administrative Code, 31 TAC 375.*

A useful table under Section V of the IUP called "Allocations and Terms Available Under Each Funding Option" lists all funding options. See the most recent IUP for this table.

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**Asset Management**

Assistance is available to encourage and promote the use of asset management tools. The TWDB generally defines an Asset Management Plan based on TCEQ Regulatory Guidance (RG) documents RG-501 “[Managing Small Public Water Systems](#)” and RG-530 “[Managing Small Domestic Wastewater Systems](#).” These documents are the basis for the Asset Management Plan for Small Systems (AMPSS) initiative Scope of Work.

**Asset Management (Preparation of Asset Management tools)** – Bonds/Loans – An eligible entity, not just small system, may be eligible for up to \$100,000 with an interest rate of zero percent to prepare all of the Asset Management / Financial Planning tools required in the current Asset Management Program for Small Systems (AMPSS) initiative’s Scope of Work and deliverables. The entity’s asset management program may include enhancements or tools that extend beyond the minimum requirements of the AMPSS program’s Scope of Work. Allocation of any available funding at an interest rate of zero percent for this option would occur concurrently with the allocation of any other funding for the project.

**Asset Management – (Implementation of Asset Management Plans)** – Bonds/Loans – A small system eligible under AMPSS may receive up to \$500,000 at zero percent (0%) for a portion of the total TWDB funding for a project if it has implemented substantially all of the Asset Management / Financial Planning tools required in the current AMPSS initiative’s Scope of Work and deliverables and the proposed project is included in its current Asset Management Plan. The small system’s asset management program may include enhancements or tools that extend beyond the minimum requirements of the AMPSS initiative’s Scope of Work. For this aspect, a small system is defined as having a population less than 10,000 or service to 5,000 connections or less.

**Disadvantaged Community Funding Option Eligibility**

A disadvantaged community is a community that meets the SRF’s affordability criteria based on income, unemployment rates, and population trends. The entity’s Annual Median Household Income (AMHI) of the entire service area (or project area, only if the project is providing first-time centralized water or wastewater service to existing residents in currently unserved areas) must be less than or equal to 75% of the state’s AMHI as listed in the most recent available American Community Survey (ACS) 5-Year Estimates and meet the Household Cost Factor thresholds.

Disadvantaged community status may be documented using either Census data or a TWDB approved survey. **An entity must request approval from the TWDB to conduct a survey** by submitting documentation that substantiates the inadequate or absent census data that led to the need to conduct a survey. Previously completed surveys, including surveys completed for funding from other sources, will be rejected if they do not follow survey methods listed in the latest version of the [Socioeconomic Survey Guidelines \(WRD-285\)](#). **A TWDB approved survey is considered valid for the five (5) year period (60 months) from the date of approval. In order to use survey results in a PIF, the survey must be completed prior to the date the TWDB receives the Project Information Form (PIF).**

The eligible level of principal forgiveness for a project is based on the difference between the calculated total Household Cost Factor (HCF) and the minimum HCF (the “base”) of 1% (if only water or sewer service is provided) and 2% (if both water and sewer services are provided) as shown in the chart below:

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HCF Difference	Principal Forgiveness as a % of SRF-funded project costs remaining after subtracting other SRF principal forgiveness
≥ 0%	70%

*Note: The above chart represents the Principals Forgiveness Eligibility levels offered under the SFY202 IUP. Any changes in the Disadvantaged Community Funding Option Principal Forgiveness Eligibility levels for SFY2027 will be included in the forthcoming IUP.*

### **American Community Survey (ACS) 5-Year Estimates**

#### **Current SFY2027 Solicitation:**

For SFY 2027, use the **2024 ACS 5-year estimates**. To calculate population adjustment for the Household Cost Factor, compare it to the population found in the **2021 ACS 5-year estimates** from the [U.S. Census Bureau's website](#).

#### **Prior SFY 2026 Solicitation:**

For SFY 2026, use the **2023 ACS 5-year estimates**. To calculate population adjustment for the Household Cost Factor, compare it to the population found in the **2020 ACS 5-year estimates** from the [U.S. Census Bureau's website](#).

A spreadsheet containing the ACS 5-year estimate data for AMHI, average household size, total prior population, total current population, total population change, and unemployment rate can be found in our **American Community Survey (ACS) 5-Year Estimates Memorandum** on our website.

### **Viability and Feasibility of Projects**

A project must demonstrate to the TWDB that it is viable, feasible, and sustainable prior to being invited to submit an application and prior to receiving a commitment for any funding option, including principal forgiveness, for the acquisition, design or construction phases of the project. A project may receive funds for the planning phase to assess the viability and feasibility of a project, including funds to prepare an asset management plan.

### **Readiness to Proceed**

The TWDB defines readiness to proceed to construction as projects having no significant permitting, land acquisition, social, contractual, environmental, engineering or financial issues that would keep the project from proceeding in a timely manner to construction.



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**SRF Program Information**

While an overview of certain aspects of the SRF programs are included in this guidance document, detailed information on the SRF programs may be found in the most current Intended Use Plans.

You may access the [CWSRF Intended Use Plan](#) and other important information about the CWSRF program on our website.

You can access the [DWSRF Intended Use Plan](#) and other important information about the DWSRF program on our website.

**Contact Information:**

If you have any questions after reading this guidance, please email the respective program at [CWSRF@twdb.texas.gov](mailto:CWSRF@twdb.texas.gov) or [DWSRF@twdb.texas.gov](mailto:DWSRF@twdb.texas.gov).