



What Is an IUP? How Intended Use Plans Can Serve as Secret Decoder Rings for the State Revolving Loan Funds (SRFs)

Date: April 10, 2025

Time: 9:00 am – 11:30 pm PDT

Duration: 2.5 Hours

Registration link: <https://us06web.zoom.us/meeting/register/KM85Up2pTzGcmArVdvvyimg>

Training Overview: This engaging and informative two-hour session will dive deep into the concept of Intended Use Plans (IUPs) and explore how they act as key tools for navigating and unlocking the potential of State Revolving Loan Funds (SRFs). SRFs provide financing to support environmental infrastructure projects, and understanding how to interpret and leverage IUPs can significantly improve your access to these funds. Oregon's DWSRF and CWSRF IUPs will be used as examples throughout the presentation.

Key Learning Outcomes:

1. Understanding the Basics:

- Gain clarity on the purpose and structure of Intended Use Plans.
- Explore how IUPs outline state priorities and funding allocations for SRF programs.

2. Decoding the Language of IUPs:

- Learn how to "decode" the complex language and technical details within IUPs.
- Understand the criteria and eligibility requirements for SRF funding, and how to match project goals with funding opportunities.

3. Maximizing Funding Potential:

- Learn strategies to align projects with the state's priorities outlined in IUPs.
- Understand how the SRF funding process works, from project selection to loan agreements, and how to get your project to stand out.

By the end of this training, participants will understand how to use IUPs as a "decoder ring" for State Revolving Loan Funds, empowering them to effectively access funding for environmental infrastructure projects.

This session is designed for environmental professionals, project managers, financial officers, and anyone involved in securing SRF funding.

Learning Objectives

By the end of this training session, participants will be able to:

- **Understand the Purpose and Structure of IUPs**
- **Interpret and Decode IUP Content**
- **Align Projects with State Priorities**
- **Leverage IUPs for Maximizing SRF Funding**
- **Identify Key SRF Program Criteria**

These objectives ensure that participants leave the training with a practical understanding of how to use IUPs to successfully navigate and unlock State Revolving Loan Funds for their projects.

Agenda:

- **Overview of the State Revolving Loan Fund Programs and how IUPs Factor In– 20 minutes**
 - A review of SRF objectives and what role the Intended Use Plans play in how the SRFs are implemented
- **IUP Topics to Focus On – 30 minutes**
 - Highlight the sections of the IUP to focus on:
 1. Loan Rate and Terms
 2. Additional Subsidization
 3. Disadvantaged Criteria/Affordability Criteria
 4. Priority Ranking Criteria
 5. Set-Asides
 6. Sources & Uses
- **Break—10 minutes**
- **IUP Topics to Focus On, cont. – 40 minutes**
 - Highlight the sections of the IUP to focus on:
 1. Loan Rate and Terms
 2. Additional Subsidization

3. Disadvantaged Criteria/Affordability Criteria
4. Priority Ranking Criteria
5. Set-Asides
6. Sources & Uses

- **Navigating Oregon's CSWRF IUP—30 minutes**

- Using the above sections, navigate through OR's IUP
- Walk through how OR interprets each section
- Discussion of how OR's interpretation affects projects

- **IUP Extra Credit— 10 minutes**

- Where else does SRF information live?
- How well have states done in spending their funds?
- Where to find state IUPs

- **Ask me Anything opportunity—10 minutes**

Instructor:

Ashley Lucht, Director

Quantified Ventures, Community Finance Team

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Bio: Ashley went to college thinking she would be the next Indiana Jones but ended up dedicating most of her professional years (so far) to public service. After almost 20 years and many interests, the work with small, volunteer boards as they endeavor to upgrade and manage their utilities has brought her the most joy. She is passionate about the State Revolving Funds and believes there is no such thing as 'free money'. She believes in empowering small communities with the tools and language they need to generate the support needed to fulfill their responsibility to manage public assets, protect public health, and promote strong diverse economies. And if Trivia Night is about high-efficiency water fixtures, especially toilets, she's your woman.

Method of Attendance Tracking: Attendance is monitored through a Zoom attendance report and live participation through poll responses.