1. INTRODUCTIONS

1.1 CHAIR TRANSITION

Mr. Schmitt thanked Sarah Hudson for her service as Chair over the past year and congratulated her on her new role as the Director of Water Resources and Infrastructure Planning for the Indiana Finance Authority.

1.2 SECRETARY NEEDED

Mr. Schmitt stated that Mr. Kaufman volunteered to assume the role of Secretary and asked if there were any further volunteers. Having no further volunteers, Mr. Kaufman became the secretary.

1.3 ROLL CALL

Mr. Kaufman called the roll.

2. INITIATIVES

2.1 2017 FUNDING SOURCES WORKSHOP

Mr. Sullivan presented the schedule from the joint Funding and Environmental Business workshop from 2016. It is expected that there will be a joint workshop in 2017. Mr. Sullivan asked if there were any suggestions for a luncheon speaker or other topics to present. There was discussion about Dr. Loring (Larry) Nies presenting on how many times the water in the Wabash river is used. Another suggestion was to have presenter speak on the changing demographics of the workforce.

Please send any other suggestions of topics to Mark Sullivan by the first week in April. If you would like to join Mark Sullivan, Vince Sommers and Tony Akles on the committee please let Mark Sullivan know.
2.2 BOTTLED WATER FUND SUBCOMMITTEE

Patti Yount reported that the bottled water fund was put on hold at the request of the legislators this session. It was also reported that Matt Damon has created water.org and partnered with Stella Artois on a, “Buy a lady a drink” campaign to provide clean water and sanitation around the globe.

If you are interested in volunteering on the bottled water fund subcommittee please let Patti Yount know.

3. FUNDING AGENCY UPDATES

3.1 GENERAL

In general, it is business as usual for the funding agencies.

3.2 ENVIRONMENTAL INFRASTRUCTURE WORKING GROUP (EIWG)

It was noted that EIWG is still available to assist communities through the funding opportunities for a project.

3.3 INDIANA FINANCE AUTHORITY – SRF

Camille Meiners introduced Shelley Love. Shelley Love is the WWSRF and DWSRF Administrator. Ms. Meiners reported that Administrator Pruitt is still releasing funds and that it is business as usual at the state level. There is $23M for waste water and $7M for drinking water. It was also reported that PER to be ranked by June 15th to be placed on the July 1 project priority list.

Sarah Hudson was hired as the Director of Water Resources and Infrastructure Planning and will be working on non-SRF initiatives. Sarah Hudson new email address is:

sahudson@ifa.in.gov

3.4 OFFICE OF COMMUNITY & RURAL AFFAIRS (OCRA)

It was reported that there is a new community liaison map and that Lori Buelhman Daniel is the new Southwest District liaison.

3.5 USDA, RURAL DEVELOPMENT (RD) – ROCHELLE OWEN

Rochelle Owen introduced Jennifer Bullock as recently hired Engineer to review the Environmental Assessments and to assist with the review of the Preliminary Engineering Report.

Jennifer Bullock’s new email address is:
Ms. Owen reported that the funding is still under the continuing resolution and should be complete April 28. This means that there is access to money and it can be obligated. There is no limit this year.

$28M in direct loan and $8M in grant this year.

It is anticipated that the 2017 budget should look like 2016 budget. There are many projects going forward this year and next. Indiana is doing well accepting projects. RD apply, the online application process, is helping to make the application process more efficient. In 2018 RD apply will be mandatory and will be the only way to apply. If you haven't gotten the access then that needs to be done right away.

The PER online submittal process is still in the review stages. The state engineers will be trained this month. Then in the summer/fall will be implemented out across the country. There is training for consultants scheduled in the spring / fall.

May 5 is the midyear pooling date. This is the date that 1/2 of the presumed budget is to be obligated. On track to have more than that obligated. It is good to use 100% so that more money can be requested.

3.6 IFA – INDIANA BROWNFIELDS PROGRAM (IBP)

3.7 TECHNICAL ASSISTANCE FOR BROWNFIELDS (TAB)

Michele Oertel and Beth Grigsby presented a case study.

The presentation is attached to these minutes.

4. UPDATES FROM ACEC STAFF

4.1 HILL VISIT

ACEC Hill Visit is April 25 and 26 and will be used to stress how well Indiana has used the budgets of past years obligations.

5. FUTURE MEETING DATES

5.1 AGENDA SETTING MEETING

Wednesday, June 7, 2017 at 1PM – American Structurepoint’s Office
5.2 REGULAR COMMITTEE MEETING

Wednesday June 21, 2017 at 1:30 PM – 1 North Capitol, First Floor Conference Room

6. ADJOURN
Indiana ACEC Funding Sources Committee  
Agency Meeting  

1 North Capitol Avenue  
Indianapolis, Indiana 46204  
First Floor Conference Room  

March 22, 2017  
1:30-3:00 PM (EDT)  

Attendance Roster at the time of Roll Call  

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<thead>
<tr>
<th>2016-2017 ACEC Committee Members</th>
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<td>Name</td>
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<td>Hinton, Mike - Board Liaison</td>
<td>Lochmueller Group</td>
<td>mhin <a href="mailto:ton@lochgroup.com">ton@lochgroup.com</a></td>
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<tr>
<td>Schmitt, Jeremy - Chair</td>
<td>American Structurepoint</td>
<td><a href="mailto:jschmitt@structurepoint.com">jschmitt@structurepoint.com</a></td>
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<tr>
<td>Kaufman, Chris - Secretary</td>
<td>Beam, Longest &amp; Neff</td>
<td><a href="mailto:ckaufman@b-l-n.com">ckaufman@b-l-n.com</a></td>
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<td>Akles, Tony</td>
<td>Strand Associates</td>
<td><a href="mailto:tony.akles@strand.com">tony.akles@strand.com</a></td>
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<td>Alvarez, Jim</td>
<td>SME</td>
<td><a href="mailto:alvarez@sme-usa.com">alvarez@sme-usa.com</a></td>
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<td>Birk, Kenny</td>
<td>VS Engineering</td>
<td><a href="mailto:khbirk@vsengineering.com">khbirk@vsengineering.com</a></td>
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<tr>
<td>Bishton, Zach</td>
<td>Christopher B. Burke Engineering</td>
<td><a href="mailto:zbishton@cbbel-in.com">zbishton@cbbel-in.com</a></td>
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<tr>
<td>Christie, Laurie</td>
<td>DLZ</td>
<td><a href="mailto:lchristie@dlz.com">lchristie@dlz.com</a></td>
<td>P</td>
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<td>Craney-Blevins, Marsha</td>
<td>GAI Consultants</td>
<td><a href="mailto:m.craney@gaiconsultants.com">m.craney@gaiconsultants.com</a></td>
<td>A</td>
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<td>Elling, Paul</td>
<td>Donohue &amp; Associates</td>
<td><a href="mailto:pelling@donohue-associates.com">pelling@donohue-associates.com</a></td>
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<td>Griesemer, Pamela</td>
<td>KERAMIDA</td>
<td><a href="mailto:pg@keramida.com">pg@keramida.com</a></td>
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<tr>
<td>King, Brad</td>
<td>Butler, Fairman &amp; Seufert</td>
<td><a href="mailto:bking@bfsengr.com">bking@bfsengr.com</a></td>
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<td>Ladd, Gary</td>
<td>Ladd Engineering</td>
<td><a href="mailto:gary@laddengr.com">gary@laddengr.com</a></td>
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<tr>
<td>Medors, Sky</td>
<td>Lawson- Fisher Associates</td>
<td><a href="mailto:smedors@lawson-fisher.com">smedors@lawson-fisher.com</a></td>
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<tr>
<td>Mirgeaux, Jonathan</td>
<td>CHA Companies</td>
<td><a href="mailto:jmirgeaux@chacompanies.com">jmirgeaux@chacompanies.com</a></td>
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<td>Sommers, Vince</td>
<td>Commonwealth Engineers</td>
<td><a href="mailto:vsommers@contactcei.com">vsommers@contactcei.com</a></td>
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<tr>
<td>Spees, Marty</td>
<td>Northpointe Engineering &amp; Surveying</td>
<td><a href="mailto:mspees@npes.biz">mspees@npes.biz</a></td>
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<td>Sullivan, Mark</td>
<td>Midwestern Engineers</td>
<td><a href="mailto:msullivan@midwesterneng.com">msullivan@midwesterneng.com</a></td>
<td>P</td>
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<tr>
<td>Swan, Troy</td>
<td>HWC Engineering</td>
<td><a href="mailto:tswan@hwcengineering.com">tswan@hwcengineering.com</a></td>
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<td>Tierney, Joe / Angie Smith</td>
<td>GRW Engineers</td>
<td><a href="mailto:jtierney@grwinc.com">jtierney@grwinc.com</a></td>
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<tr>
<td>Young, Lori</td>
<td>Curry &amp; Associates</td>
<td><a href="mailto:lyoung@recurry.com">lyoung@recurry.com</a></td>
<td>A</td>
</tr>
<tr>
<td>Yount, Patti</td>
<td>Lochmueller Group</td>
<td><a href="mailto:pyount@lochgroup.com">pyount@lochgroup.com</a></td>
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<tr>
<td><strong>ACEC Office</strong></td>
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<tr>
<td>Bauer, Beth</td>
<td>ACEC Indiana</td>
<td><a href="mailto:bbauer@acecindiana.org">bbauer@acecindiana.org</a></td>
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**Agency Representatives**  

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<tr>
<td>Bullock, Jennifer</td>
<td>USDA Rural Development</td>
<td><a href="mailto:Jennifer.bullock@in.usda.gov">Jennifer.bullock@in.usda.gov</a></td>
<td>P</td>
</tr>
<tr>
<td>Crouch, Matt</td>
<td>Office of Community &amp; Rural Affairs</td>
<td><a href="mailto:mcrrouch@ocra.in.gov">mcrrouch@ocra.in.gov</a></td>
<td>A</td>
</tr>
<tr>
<td>Dunston, Aletha</td>
<td>Office of Community &amp; Rural Affairs</td>
<td><a href="mailto:adunston@ocra.in.gov">adunston@ocra.in.gov</a></td>
<td>A</td>
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<tr>
<td>Grigsby, Beth</td>
<td>Technical Assistance for Brownfields</td>
<td><a href="mailto:grigsby@sme-usa.com">grigsby@sme-usa.com</a></td>
<td>P</td>
</tr>
<tr>
<td>Mason, Marc</td>
<td>USDA Rural Development</td>
<td><a href="mailto:marc.mason@in.usda.gov">marc.mason@in.usda.gov</a></td>
<td>A</td>
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<tr>
<td>Meiners, Camille</td>
<td>IFA – State Revolving Loan Fund</td>
<td><a href="mailto:cmeiners@ifa.in.gov">cmeiners@ifa.in.gov</a></td>
<td>P</td>
</tr>
<tr>
<td>Oertel, Michele</td>
<td>IFA – Indiana Brownfields Program</td>
<td><a href="mailto:moertel@ifa.in.gov">moertel@ifa.in.gov</a></td>
<td>P</td>
</tr>
<tr>
<td>Owen, Rochelle</td>
<td>USDA Rural Development</td>
<td><a href="mailto:rochelle.owen@in.usda.gov">rochelle.owen@in.usda.gov</a></td>
<td>P</td>
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<tr>
<td>Palmer, Jamie</td>
<td>IU Public Policy Institute</td>
<td><a href="mailto:jpalmer@iupui.edu">jpalmer@iupui.edu</a></td>
<td>A</td>
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Case Study: Creative Funding through the Indiana Finance Authority for Brownfield & Wastewater Projects

Michele Oertel
Indiana Brownfields Program
317-234-0235
moertel@ifa.in.gov
www.brownfields.in.gov

ACEC Funding Sources Committee Meeting
Indianapolis
March 22, 2017
Presentation Overview

- What are brownfields? What is nonpoint source (NPS) water pollution?
- What are the key issues with brownfields?
- Can funding be leveraged for a brownfield project AND a wastewater/drinking water project?
- How can IFA Environmental Programs help?
- What funding is offered by the Indiana Brownfields Program (IBP)?
- What funding is offered by the SRF Program?
- Is there a case study of IFA creative financing?
- What is the bottom line?

- Brownfields have a range of sizes/issues/reuses
- Ex: small, abandoned gas station with redevelopment issues = brownfield

- Brownfield redevelopment is interdisciplinary
Indiana defines a brownfield site as:

- a parcel of real estate
- abandoned, inactive, or underutilized
- on which expansion, redevelopment, or reuse is complicated because of the presence or potential presence of a hazardous substance, a contaminant, petroleum, or a petroleum product that poses a risk to human health and the environment.

Similar to U.S. EPA definition (real property)
Can be a nonpoint source (NPS) of pollution
What is Nonpoint Source Water Pollution?

- **Nonpoint source (NPS)** water pollution results when rainfall, snowmelt or irrigation moves over land or through the ground, picks up pollutants, and deposits them into surface waters or introduces them into groundwater.

- NPS water pollution may cause adverse changes to vegetation, hydrology or aquatic communities.

- NPS water pollution can contaminate private and public water wells.

- **Brownfield** contamination may be considered a NPS surface or groundwater pollution.
Why is Brownfield Redevelopment Important?

- Links economic vitality with environmental protection
- Stimulates economy through investment and job creation
- Returns abandoned or underutilized properties to tax roles
- Values existing infrastructure
- Values deconstruction
- Decreases costs
- Decreases blight
- Improves community appearance
- Fosters sustainable and livable communities
- Increases surrounding property values
- Promotes infill development
- Encourages planned growth / discourages urban sprawl
- Preserves greenspace and farmland
What are Obstacles to Brownfield Redevelopment?

- Real or potential environmental contamination
- Assessment / Cleanup costs
- Liability issues for the lender, prospective purchaser, and third parties
- Economic development climate
- Viability of re-use plans for the site
- Unknowns – risks, ownership, access
- Lack of resources – knowledge, money, partners

Brownfield redevelopment = real estate project with environmental component. Each brownfield redevelopment project is unique with a unique mix of resources!
How can IFA Environmental Programs help?

Indiana Brownfields Program Background

- Housed under the Indiana Finance Authority (IFA)
- Created by 2005 legislation (SEA 578); IC 13-11-2-19.3
- Funded by state appropriations & federal funds
- Provides governmental assistance to address environmental issues that impede brownfield redevelopment
- Works in partnership with U.S. EPA et al.
How can IFA Environmental Programs help?

Indiana Brownfields Program Background

- Allows for *voluntary* participation – not enforcement
- Works typically with *communities or prospective purchasers* vs. RPs
- Relies on existing laws/regs/policies to protect human health and environment
- Has different processes for different incentives
- Uses consultants differently per incentive
- Utilizes Indiana Department of Environmental Management (IDEM) Remediation Closure Guide
- Offers closure documents
Indiana Brownfields Program Lends a Hand

- Helps stakeholders by providing:
  - Educational Assistance
  - Financial Assistance
  - Legal Assistance
  - Technical Assistance
Indiana Brownfields Program Lends a Hand: Financial Incentives

- Indiana Brownfields Program (IBP) – *loan funding, professional services*
- Revolving Loan Fund (RLF) Incentive (federally funded)
- IFA State Revolving Fund (SRF) Loan Program coordination
- IDEM Supplemental Environmental Project (SEP) coordination
- Phase I Initiative
- Petroleum Orphan Sites Initiative (POSI)
- OCRA-IFA partnership coordination (e.g., demo, PI/II)
- DLGF Tax Waiver brownfield determinations
- Misc. (e.g., U.S. EPA, IHCDA LIHTC) brownfield determinations/support letters (e.g., PEDs)
- Current/Future funding via U.S. EPA (e.g., 128(a), RLF)
SRF Lends a Hand: Financial Incentives

SRF Program – low-interest loan funding and limited grants

- Operates under Section 319 of the Clean Water Act
- **Wastewater** & Drinking Water Infrastructure Projects
  - Treatment plants, Collection systems, Decentralized systems, Combined Sewer Overflow (CSO) remedies, Infiltration/Inflow, Nonpoint source (NPS)
  - Additional Interest Rate Reduction
    - NPS Projects *(water pollution abatement)*
    - Green / Sustainable Projects

- Offers funding for brownfield cleanup activities that abate or prevent nonpoint source (NPS) pollution of Indiana’s waters as a nonpoint source water pollution control project (e.g., groundwater remediation)

- Eligible entities: Cities, Towns, Counties, Regional Sewer/Water Districts, Conservancy Districts, Water Authorities

- Rolling applications; July 1 Priority Ranking; July 1-Dec. 31 Priority funds
SRF Lends a Hand: Financial Incentives

SRF Program – low-interest loan funding

- Loans to political subdivisions (including incorporated cities, towns, counties and regional water, sewer, waste, sanitary and conservancy districts) for projects that improve wastewater and drinking water infrastructure and/or address NPS contamination.
- Loans to private and nonprofit facilities for projects that improve drinking water infrastructure.
- Integrating a NPS project with a wastewater infrastructure project lowers the interest rate for a loan by up to 0.5 percent, making available additional funds that can be applied to qualified NPS activities. (Drinking water loans cannot fund NPS projects). A wastewater loan can also be obtained solely for a NPS project.

- An SRF loan is a fixed rate, 20-year term loan.
- Interest rates reset quarterly and are at or below 90% of the average 20-year AAA-rated, general obligation bond Municipal Market Data. Rates can be further discounted based on the applicant’s median household income (from current census data) and local user rates.
IBP & SRF Lend a Hand: Financial Incentives

- Brownfields & SRF NPS projects – loan funding
  - Projects that are publicly or privately owned with a public or private use.
  - Projects with an existing, quantified pollution abatement need.
  - Projects that have a direct water quality benefit.
  - Portions of a project that remediate, mitigate the impacts of, or prevent water pollution.
  - Projects to clean up sites contaminated with hazardous substances and/or petroleum contamination that impact surface or ground water quality.
IBP & SRF Lend a Hand: Financial Incentives

- Brownfields & SRF NPS projects – loan funding
  - Example clean-up projects for sites with surface or ground water contamination:
    - Excavation, removal and disposal of soil or sediments
    - Excavation and disposal of underground storage tanks
    - Capping of wells or soil or landfills
    - Monitoring of groundwater or surface water for contaminants
    - Groundwater remediation
    - Demolition, if necessary to get to contaminant source
    - Water quality-related landfill closure activities at non-discharging municipal landfills without leachate collection systems (public and privately owned landfills)
    - Remediation Work Plan development
IBP & SRF Lend a Hand: Financial Incentives

- Brownfields & SRF NPS projects – loan funding mechanics
  - Demonstrated surface and/or groundwater impacts with data from a completed Phase II environmental assessment.
  - An open SRF loan and/or a pending SRF loan application (preferably early in the pre-closing process).
  - A draft or final Remediation Work Plan (as a substitute for the SRF-required Preliminary Engineering Report).
  - Submittal of a completed brownfield Revolving Loan Fund (RLF) Incentive application and supporting documentation.
Examples of Brownfield Reuse/Redevelopment

- Industrial (single building or park complex)
- Commercial (bank)
- Retail (shopping center, grocery store)
- Residential (houses, condos, apartments)
- Public (government offices)
- Greenspace (park, soccer field, golf course, trail, greenway)
- Mixed
Redevelopment by Land Use

Completed Redevelopment by Land Use

Industrial: 11%

Misc: 11%

Government, Recreation, Parks: 20%

Residential: 18%

Commercial: 40%
Brownfields and SRF Programs join forces for creative brownfield financing: Former Elkhart Foundry and LaBour Pump, Elkhart

For more details:


Former Elkhart Foundry—Before Demolition

Former LaBour Pump—Before Demolition
Creative funding concept:

- Conceived during discussions with the City of Elkhart about its planned wastewater project.
- The $8.83 million combined sewer overflow (CSO) abatement project was to be financed by the City with open market financing, which would have been more expensive than utilizing SRF financing (5.5% vs. 2.6%, saving $3.3 million).
- The City also had two brownfields with water quality impacts in need of remediation.
- IFA suggested a funding plan utilizing both Indiana Brownfields Program and SRF monies, enabling the City to fund two brownfield projects at no additional cost, while at the same time providing a reliable repayment source to IFA.
Case Study: Teamwork leads to Success!

Successful financing /savings resulted in the following:

- $650,000 SRF financing for one of the two brownfield remediation projects
- $1,250,000 brownfield financing to demolish and remediate two brownfield sites
- CSO project addressed as planned
- $2,950,000 loaned for two brownfield remediation projects ($1,050,000 of which was state Low-Interest Loan funding) at no additional cost to the City
- Remediation/redevelopment of two longstanding brownfields in Elkhart
Case Study: Teamwork leads to Success!

Combined/coordinated financial assistance:

- City of Elkhart: Total (revised) loan amount = $2,936,112
  - $293,377 State Revolving Fund (SRF) Loan Program (actual amount disbursed)
  - $636,112 Brownfields RLF (actual amount disbursed)
  - $600,000 Brownfields ARRA RLF
  - $1,021,036 State Brownfields Low-Interest Loan (actual amount disbursed)

- Additional financial assistance to sites/projects:
  - State brownfield grant funding: $46,153 (Former Elkhart Foundry & Machine)
  - EPA brownfield grant funding: portion of two $200,000 EPA assessment grants (Former LaBour Pump)
Brownfield Redevelopment in Elkhart:

- **Former Elkhart Foundry & Machine**
  - IFA loan (2010) to City of Elkhart and Brownfields Site Status Letter and Environmental Restrictive Covenant (ERC) helped to document closure of environmental conditions on the Site following the loan-funded demolition and remediation activities
  - Commercial reuse of the site is planned

- **Former LaBour Pump**
  - IFA loan (2010) to City of Elkhart and Brownfields Site Status Letter facilitated site redevelopment into Sterling Park, a small community park/garden including trees, landscape rocks, a walking path, benches, picnic tables, a shelter, retaining walls, and 29 raised bed gardens. Green components of redevelopment include reuse of granite from Miles Labs and wind/solar light.
Case Study: Teamwork leads to Success!

Former LaBour Pump...Redeveloped as Sterling Park

2010: Site is razed and remediated
2011: City of Elkhart receives Cummins Environmental Challenge Grant for self-sustaining environmental park
Case Study: Teamwork leads to Success!

Former LaBour Pump...Redeveloped as Sterling Park
2014: Sterling Park, Elkhart
Case Study: Teamwork leads to Success!

Former LaBour Pump...Redeveloped as Sterling Park
2014: Elements of a self-sustaining environmental park
Brownfields Bottom Line

- Brownfields: not just obstacles/challenges – but opportunities!
- Begin with the end in mind – redevelopment/revitalization.
- Brownfield redevelopment balances economic development with environmental protection – win win!
- Consider brownfield projects and wastewater projects as part of community comprehensive plan.
- 3 Ps: planning *(long-term)*, public participation, and partnerships are keys to success!!!
- Indiana Brownfields Program and SRF Program offer tools to address environmental issues that can facilitate brownfield redevelopment.
- *Next steps*: Determine big picture needs and ask for appropriate assistance....
Contact Information

- Meredith Gramelspacher, IBP Director / General Counsel 317-233-1430  
  mgramels@ifa.in.gov
- Michele Oertel, Federal Funding & Community Relations Coordinator 317-234-0235  
  moertel@ifa.in.gov
- Bonny Elifritz, Financial Resources Coordinator 317-234-1688  
  BElifritz@ifa.IN.gov
- Andrea Robertson Habeck, Technical Staff Coordinator 317-234-0968  
  aroberts@ifa.in.gov
- Kyle Hendrix, Redevelopment Coordinator 317-234-4860  
  lhendrix@ifa.in.gov
- Nancy Dollar, Planning Measures & Compliance Coordinator 317-234-9764  
  NaDollar@ifa.IN.gov
- Bill Harkins, SRF Program Director 317-234-4862  
  wharkins@ifa.in.gov
- Camille Meiners, P.E., SRF Section Chief 317-234-3661  
  cmeiners@ifa.in.gov
- Shelley Love, WWSRF and DWSRF Administrator 317-232-4396  
  slove@ifa.in.gov

Check out both IFA programs at: www.brownfields.in.gov and www.in.gov/ifa/srf/index.htm
Technical Assistance to Brownfields (TAB) Program

- A National Program funded by EPA
- Free brownfields assistance to local governments and tribes
- Funded by EPA
- Kansas State University provides the EPA services EPA Regions 5, 6, 7, and 8
EPA DEFINITION OF A BROWNFIELDS

“…..real property, the expansion, redevelopment, or reuse of which may be complicated by the presence or potential presence of a hazardous substance, pollutant or contamination.” (EPA)

In layman’s terms:

• A brownfield is a property that is difficult to develop because it is contaminated or believed to be contaminated
• A site with low to moderate levels of contamination
• Hazardous, petroleum, asbestos, lead paint, mold, meth- lab contaminants, and mine-scarred lands

EPA Performance Measures:

• Properties assessed
• Jobs leveraged
• Dollars leveraged
• Acres made ready for anticipated re-use
What Created Brownfields?

Unintended consequences of federal and state environmental regulations

• Liability for contamination
• Stringent cleanup requirements

Relative costs of development – old urban sites vs. new suburban land
EPA Brownfields Laws and Incentives

Help address the environmental issues for property transactions & expansions

Liability protection
- For prospective purchaser, contiguous landowners, and others
- Perform due diligence (environmental assessments) before purchase and cooperate in addressing addressing environmental issues

Funding for eligible sites and entities include:
- Assessment, cleanup
- Redevelopment (primarily non-EPA sources)

Free Technical Assistance through the EPA Technical Assistance to Brownfields Communities (TAB):
- National EPA Program
- Non-Profits and Local Governments qualify
- Range of free services
- https://www.ksutab.org/
**EPA BROWNFIELDS RESOURCES AND SERVICES**

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<tbody>
<tr>
<td>SITE-SPECIFIC OR COMMUNITY WIDE ASSESSMENT GRANT</td>
<td>$200-$400K FOR PETROLEUM OR HAZARDOUS SUBSTANCES, ANNUAL</td>
</tr>
<tr>
<td>COMMUNITY-WIDE COALITION ASSESSMENT GRANT</td>
<td>REQUIRES 3 GOVERNMENTS OR OTHER ELIGIBLE ENTITIES, UP TO $600K, ANNUAL</td>
</tr>
<tr>
<td>CLEANUP GRANT²</td>
<td>$200K PER SITE – UP TO 3 SITES, ANNUAL</td>
</tr>
<tr>
<td>EPA BROWNFIELDS REVOLVING LOAN FUND</td>
<td>UP TO $1 MILLION FOR CLEANUP</td>
</tr>
</tbody>
</table>

**EPA SERVICES**

<table>
<thead>
<tr>
<th>EPA TAB PROGRAM</th>
<th>CONTACT TAB DIRECTLY FOR SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPA TARGETED BROWNFIELDS PROGRAM</td>
<td>CONTACT EPA DIRECTLY</td>
</tr>
</tbody>
</table>

¹-Typically regional districts are eligible; ²-Non-profits are eligible; grantee must own property
HOW TAB WORKS WITH INDIVIDUAL STATES

- EPA
- Indiana Brownfields Program: State Program Funding
- Kansas State University: Technical Assistance Program Assistance

Partners
TAB Assistance to Communities

- Tailored to specific community needs
- Typically coordinated through the city, tribal or non-profit brownfields project manager
- May include:
  - Help with identifying funding sources for revitalization projects
  - Review of EPA and other grant applications
  - Help finding a consulting firm
  - Review of project plans, technical reports
  - Assistance with community outreach/involvement
  - Educational workshops and redevelopment visioning
  - Other assistance, as needed and agreed upon
- Communities accepted on a ‘first come’ basis
- Depends on staff/funding availability
Who Identifies Properties as Brownfields?

EPA?? IDEM?? IBP??

EPA and the State provides the guidance, *but the community identifies a property as a brownfield.*

**TAB can assist you with your inventory!!**
VISIONING PROCESS

• Communities often do not have a vision for a brownfields site
• TAB arranges the facilitation of a visioning process with the Community
• TAB also arranges for an Architect to provide project renderings
What Are You Looking For?

• Abandoned property
• Active but underutilized…salvage yard next to the greenway
• Real estate turnover complicated by real or perceived contamination
• Blighted property that significantly conflicts with a Master Plan or Revitalization Plan
• Property blighted and located at the gateways to your community
Perceptions…Stigma

• Often it is the PERCEPTION of contamination that keeps properties from being redeveloped, not the actual presence of contamination.

• Once the “stigma” is gone, properties can be returned to productive use.
Brownfields Challenges: the Unknown

• Is it real or potential contamination?
• How much will it cost?
• How much time will it take?
• Do site conditions deter the reuse vision?
• What is the true liability for the prospective purchaser, the lender, other stakeholders?
• Project costs more than the property is worth
Potential EPA Funding Resources
Questions??

For more information, contact:

Beth Grigsby, LPG  
SME Senior Project Consultant  
317-876-0200  
grigsby@sme-usa.com  
TAB Partner, Kansas State University