



# Resource Guide

## American Recovery and Reinvestment Act of 2009

### Office of Congresswoman Niki Tsongas

1607 Longworth House Office Building | Washington, DC 20515  
202.225.3411 | [www.tsongas.house.gov](http://www.tsongas.house.gov)

*The following information about potential funding opportunities included in the American Recovery and Reinvestment Act of 2009 was compiled by the Office of Congresswoman Niki Tsongas.*

*This document is intended to provide the public with basic information of potential federal assistance and funding opportunities. Those interested in these or similar programs should contact the appropriate federal and state agencies for detailed information.*

*This list is not exhaustive but representative of various funding opportunities of interest to the 5<sup>th</sup> district. This information is subject to change and additional requirements, restrictions and guidance may apply.*

March 14, 2009

Dear Friend,

This resource guide is a summary of the American Recovery and Reinvestment Act (ARRA), as well as resources that might be useful as you begin to explore ways to utilize these federal funds so that we can effectively stimulate our economy.

Please do not hesitate to be in touch with me or my staff if you have questions and I will be sure to continue to pass along information as it becomes available. Brian Martin in my district office (978.459.0101) and Sarah Christopherson in my Washington, DC office (202.225.3411) stand ready to assist you. I encourage you to contact my office and alert us to any pending federal applications so we may provide all appropriate support. For questions about federal grants, please contact Stacie Hargis in my Lowell office (978.459.0101).

***In general, recovery package funding represents an increase in the amount being channeled through currently existing pipelines.*** Just as they do with regularly appropriated sums, federal agencies will allocate these funds in five primary ways: by formula, by competition, by demand, by agency plan, and by automatic disbursement.

The economic challenges confronting us are profound. But throughout our nation's history, it is at these times that we have come together to create a stronger, more innovative, more prosperous society. The American Recovery and Reinvestment Act will help get our economy moving again through job creation in the immediate term and vital investment in our communities over the long term. Together, I know we can create new jobs and keep the cities and towns that make up the Fifth Congressional District at the forefront of economic, educational and innovative excellence.

Sincerely,



Niki Tsongas  
Member of Congress

**The following information about potential funding opportunities included in the American Recovery and Reinvestment Act of 2009 was compiled by the Office of Congresswoman Niki Tsongas.**

**This document is intended to provide the public with basic information of potential federal assistance and funding opportunities. Those interested in these or similar programs should contact the appropriate federal and state agencies for detailed information. This list is not exhaustive but representative of various funding opportunities of interest to the 5<sup>th</sup> district. This information is subject to change and additional requirements, restrictions and guidance may apply.**

### **Websites on the American Recovery and Reinvestment Act (ARRA)**

- Recovery package website: <http://www.recovery.gov/>. This is intended to be one portal where the public can find and analyze information including grants and contracts awarded, and report potential fraud, waste and abuse pertaining to the Recovery Act.
- Under recently issued OMB guidance, all agencies are instructed to dedicate a section of their primary websites to Recovery Act activities with a url following the format of [www.agencyname.gov/recovery](http://www.agencyname.gov/recovery)
- Governor Patrick's website with information about the Commonwealth's plan for utilizing recovery package funds: <http://www.mass.gov/recovery>
- Regularly updated website for all federal grants: <http://www.grants.gov/>
- Regularly updated website for federal loan opportunities through the Departments of Agriculture, Commerce, Education, Housing and Urban Development, and Veterans Affairs, and the Small Business Administration: <http://www.govloans.gov>
- Regularly updated website for all federal contracting opportunities: <https://www.fbo.gov/>
- Summary from the House Ways and Means Committee about recovery tax provisions: <http://waysandmeans.house.gov/media/pdf/111/arra.pdf>
- Congresswoman Tsongas' office grants site: <http://tsongas.house.gov/?sectionid=13&sectiontree=4,13>

*In general, recovery package funding represents an increase in the amount being channeled through currently existing pipelines.* Just as they do with regularly appropriated sums, federal agencies will allocate these funds in five primary ways: by formula, by competition, by demand, by agency plan, and by automatic disbursement. Several agencies have already begun posting relevant information about the recovery package on their sites. Where possible, those web links are provided. Under recently issued OMB guidance, all agencies are instructed to dedicate a section of their primary websites to Recovery Act activities with a url following the format of [www.agencyname.gov/recovery](http://www.agencyname.gov/recovery). This document will be organized by nine sections according to subject matter. Each section will be further broken down into each of the ways funds will be allocated.

Unless otherwise indicated, all numbers are national; Massachusetts numbers are indicated and where possible, 5<sup>th</sup> district numbers are indicated. **This list is not exhaustive but representative of various funding opportunities of interest to the 5<sup>th</sup> district.**

### **Funding Distribution by Type**

**BY FORMULA.** These funds are allocated directly to eligible states and local entities via established federal formulas, often based on population and need. Many of these funds are then sub-allocated by states through competitive grant programs. For additional information on state grant programs, including those funded by federal formula allocations, see <http://www.mass.gov/?pageID=mg2subtopic&L=5&L0=Home&L1=State+Government&L2=Local+Government&L3=Community+Development&L4=Grants+and+funding&sid=massgov2>

**BY COMPETITION.** These funds are distributed to eligible entities through a competitive process directed by a federal agency. In the coming weeks, agencies will distribute requests for proposals and convene panels to evaluate applications. A number of these grant programs are established programs and they will follow the same or a similar (though possibly accelerated) process. Others are new grant programs which require additional direction from the relevant agency. For additional information on accessing grants, see <http://tsongas.house.gov/?sectionid=13&sectiontree=4,13> or speak with Stacie Hargis in Congresswoman Tsongas' Lowell Office at (978) 459-0101. Information on eligibility and requirements, and application tools will be posted on [www.grants.gov](http://www.grants.gov).

In anticipation of the Funding Opportunity Announcement being released shortly, there are several one-time actions that must be completed by prospective applicants in order to submit an application through Grants.gov—e.g., obtain a Dun and Bradstreet Data Universal Numbering System (DUNS) number, register with the Central Contract Registry (CCR), register with the credential provider, and register with Grants.gov. Due to the likelihood of a short response period, interested applicants are strongly encouraged to ensure these requirements have been met. Detailed information on the DUNS and CCR process is presented at <http://www.grants.gov/GetStarted>.

**BY DEMAND.** These funds are distributed in response to demand from eligible individuals. Unemployment insurance and Federal Housing Administration loans are two examples.

***BY AGENCY PLAN.*** These funds are allocated to federal agencies according to established public operating and spending plans. National Parks construction and defense and veterans infrastructure are two examples.

***BY AUTOMATIC DISBURSEMENT.*** These funds are distributed to eligible individuals. The Make Work Pay Tax cut for individuals and families is one example.

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## Section I - Infrastructure

Highway, Bridge and Transit; Water and Wastewater; Environmental Infrastructure

### *BY FORMULA*

The American Recovery and Reinvestment Act of 2009 allocates more than \$45 billion for our nation's highways, bridges and transit systems. Nearly all of these funds will be distributed to the states based on existing formulas. The Commonwealth of Massachusetts is estimated to receive more than \$757 million

On March 6, Governor Patrick announced that the federal government has given Massachusetts the authority to spend \$437.9 million on transportation projects through federal highway funds under the American Recovery and Reinvestment Act. An additional \$319 million in recovery funds will go toward Regional Transit Authorities and the Massachusetts Bay Transportation Authority. More information about these funds is available on [mass.gov/recovery](http://mass.gov/recovery) or specifically by following:

[http://www.mass.gov/?pageID=gov3pressrelease&L=4&L0=Home&L1=Key+Priorities&L2=Job+Creation+%26+Economic+Growth&L3=Massachusetts+Recovery+and+Reinvestment+Plan&sid=Agov3&b=pressrelease&f=090306\\_stimulus&csid=Agov3](http://www.mass.gov/?pageID=gov3pressrelease&L=4&L0=Home&L1=Key+Priorities&L2=Job+Creation+%26+Economic+Growth&L3=Massachusetts+Recovery+and+Reinvestment+Plan&sid=Agov3&b=pressrelease&f=090306_stimulus&csid=Agov3)

### **Highways and Bridges Improvement Program**

*\$437.9 million for Massachusetts in highway infrastructure funding*

**Agency:**

Federal Highway Administration (FHWA)

[www.fhwa.dot.gov/economicrecovery/index.htm](http://www.fhwa.dot.gov/economicrecovery/index.htm)

**Administrator:**

Mass Highway

<http://www.mhd.state.ma.us/>

617.973.7800

**Eligibility:** Funds are distributed to states via the same formula as under current law for activities eligible under the Federal Surface Transportation Program. Projects should be included in approved state and metropolitan transportation plans (TIPs), be able to award funds within 120 days of enactment, be completed in a two-year time frame, and be located in economically-distressed areas.

**Description:** This money could also include rail and port infrastructure activities at the discretion of the states. (Highway projects under the FHWA are typically funded through the Highway Trust Fund, which is funded by the gas tax, not through an appropriation. Recovery funds are above and beyond the gas tax revenue.) The bill gives states/local entities the ability to waive all matching requirements, allowing the federal government to pay for 100% of the total cost of the project.

### **Transit Capital Assistance**

*\$319.7 million for Massachusetts for investments in mass transit*

**Agency:**

Federal Transit Administration (FTA)

[http://www.fta.dot.gov/index\\_9118.html](http://www.fta.dot.gov/index_9118.html)

**Administrator:**

Massachusetts Executive Office of Transportation (EOT)

<http://www.eot.state.ma.us/>

617.973.7000

**Eligibility:** Funds are distributed via formula to regional transit authorities.**Description:** The bill gives states/local entities the ability to waive all matching requirements, allowing the federal government to pay for 100% of the total cost of the project.**Drinking Water State Revolving Fund (SRF)/Clean Water State Revolving Fund***\$52.6 million for Massachusetts through the Drinking Water SRF to address the backlog of drinking water infrastructure needs and \$135 million for Massachusetts through the Clean Water SRF to address the backlog of clean water infrastructure needs***Agency:**

Environmental Protection Agency (EPA)

[http://www.fta.dot.gov/index\\_9118.html](http://www.fta.dot.gov/index_9118.html)**Administrator:**

Massachusetts Department of Environmental Protection (MassDEP)

<http://www.mass.gov/dep/water/wastewater/wastewat.htm>

617.292.5500

**Eligibility:** States are to award SRF assistance to projects already included on their Intended Use Plans.**Description:** Under current law, Clean Water SRF allocations are governed by the Clean Water Act, while Drinking Water SRF allocations are governed by a formula developed by the EPA that reflects the proportional share of each state's funding needs.***BY COMPETITION*****National Surface Transportation System - Discretionary Grants***\$1.5 billion was included for discretionary grants for the National Surface Transportation System***Agency:**

U.S. Department of Transportation (DOT)

<http://www.dot.gov/recovery>**Administrator:**

Region I Transportation Systems Center

617.494.2055

**Eligibility:** This competitive grant program applies to projects that will have a significant impact on the nation, a metropolitan area or region. Eligible projects include but are not limited to, highway or bridge projects eligible under title 23, including interstate rehabilitation, improvements to the rural collector road system, reconstruction of the overpasses and interchanges and public transportation projects eligible under chapter 53 of title 49. Priority will be given to projects that require a contribution of federal funds in order to complete an overall financing package and to projects that can be completed within 3 years.

**Description:** These funds remain available through September 30, 2011. The minimum grant that can be awarded under this program is \$20 million and the maximum grant is \$300 million. The Secretary may waive the minimum grant size for the purpose of funding significant projects in smaller cities, regions or states as long as 20% of the funds are not awarded in a single state. The Secretary is required to publish criteria on the basis for which funds will be awarded within 90 days. Furthermore, the Secretary is required to accept funding applications no later than 180 days after the criteria is announced and select all projects to be funded under this program not 1 year after enactment. To date, no further details have been released about this program.

### **Rural Development Department Grant and Loan Program**

*\$1.38 billion was included to fund this grant and loan program for water and wastewater infrastructure projects in rural areas, cities and towns with populations of 10,000 or less*

<p><b>Agency:</b> U.S. Department of Agriculture's Rural Development Department (USDA) <a href="http://www.rurdev.usda.gov">http://www.rurdev.usda.gov</a></p>
<p><b>Administrator:</b> Holden USDA Service Center <a href="http://www.rurdev.usda.gov/ma/Index.html">http://www.rurdev.usda.gov/ma/Index.html</a> 508.829.4477</p> <p>Westford Service Center 978.692.1904</p>
<p><b>Eligibility:</b> Public entities or non-profit organizations may qualify for assistance.</p>
<p><b>Description:</b> Eligible projects include but are not limited to drinking water, sanitary sewer, solid waste and storm drainage facilities. Grants are also made to non-profit organizations to provide technical assistance and training to assist rural communities with their water, wastewater, and solid waste problems.</p>

### **Brownfields Grants**

*\$100 million was included for Brownfields projects*

<p><b>Agency:</b> Environmental Protection Agency (EPA) <a href="http://www.epa.gov/brownfields/pilot.htm">http://www.epa.gov/brownfields/pilot.htm</a></p>
<p><b>Administrator:</b> EPA New England <a href="http://www.epa.gov/region01/contact/index.html">http://www.epa.gov/region01/contact/index.html</a> 888.372.7341</p>
<p><b>Eligibility:</b> Funds and technical assistance are available to states, communities, and other stakeholders in economic redevelopment.</p>
<p><b>Description:</b> Funds are provided to address environmental site assessment and cleanup, 25% of which are mandated by law to address petroleum contamination. Funds will capitalize revolving funds and provide low interest loans, job training grants and technical assistance to local governments and non-profit organizations.</p>

**National Clean Diesel Funding Assistance Program**

*\$156 million will be awarded on a competitive basis to support diesel emission reduction programs*

**Agency:**

Environmental Protection Agency (EPA)

<http://www.epa.gov/otaq/eparecovery/prognational.htm>

**Administrator:**

EPA New England

<http://www.epa.gov/region01/contact/index.html>

888.372.7341

**Eligibility:** U.S. regional, state, or local agencies with jurisdiction over transportation or air quality; nonprofit organizations or institutions that represent or provide pollution reduction or educational services to persons or organizations that operate diesel fleets; and entities whose principle purpose is the promotion of transportation or air quality.

**Description:** This Recovery Act funding will be offered this year in addition to any EPA FY 2009 National Diesel Emissions Reduction Program appropriations. There will be separate competitive announcements issued for the Recovery Act funding and for the FY 2009 National Diesel Emissions Reduction Program Appropriation funds. Competitive announcements for the Recovery Act funding will be available in early March 2009. Visit the program web sites listed for updates and competition schedule information. Recovery Act funding will have an expedited competition schedule and applicants must comply with Recovery Act provisions. We anticipate a 40-day application period for the Clean Diesel Program competitive announcements (the Emerging Technology Program will be open 47 days).

**National Clean Diesel Emerging Technology Program**

*\$20 million will support the use, development and commercialization of emerging technologies that reduce emissions from diesel engines*

**Agency:**

Environmental Protection Agency (EPA)

<http://www.epa.gov/otaq/eparecovery/progmerge.htm>

**Administrator:**

EPA New England

<http://www.epa.gov/region01/contact/index.html>

888.372.7341

**Eligibility:** U.S. regional, state, or local agencies with jurisdiction over transportation or air quality; nonprofit organizations or institutions that represent or provide pollution reduction or educational services to persons or organizations that operate diesel fleets; and entities whose principle purpose is the promotion of transportation or air quality.

**Description:** Under this competitive grant program, funding must be used to achieve significant reductions in diesel emissions in terms of: tons of pollution produced and diesel emissions exposure (particularly from fleets operating in areas designated by the Administrator as poor air quality areas), and the project must demonstrate the ability to maximize job preservation and creation. The Program will be awarded on a competitive

basis to support diesel emission reduction projects which maximize job creation and preservation.

### **SmartWay Clean Diesel Finance Program**

*\$30 million will support the creation of national, state or local innovative clean diesel financing programs*

**Agency:**

Environmental Protection Agency (EPA)

<http://www.epa.gov/otaq/eparecovery/progfinance.htm>

**Administrator:**

EPA New England

<http://www.epa.gov/region01/contact/index.html>

888.372.7341

**Eligibility:** U.S. regional, state, or local agencies with jurisdiction over transportation or air quality; nonprofit organizations or institutions that represent or provide pollution reduction or educational services to persons or organizations that operate diesel fleets; and entities whose principle purpose is the promotion of transportation or air quality.

**Description:** The SmartWay Clean Diesel Finance Program will support the creation of national, state or local innovative clean diesel financial programs, which maximize job creation and preservation. Innovative financial programs include those where the loan recipient receives a unique financial incentive (i.e., better than regular market rates or conditions) for the purchase of retrofitted vehicles or equipment.

### **Hazardous Substance Superfund Hazardous Waste Cleanup**

*\$600 million will support the programs*

**Agency:**

Environmental Protection Agency (EPA)

<http://www.epa.gov/otaq/eparecovery/progfinance.htm>

**Administrator:**

EPA New England

<http://www.epa.gov/region01/contact/index.html>

888.372.7341

**Eligibility:** Funds will be limited to the 1,255 sites on its National Priority List of superfund remedial sites. <http://www.epa.gov/superfund/sites/npl/index.htm> (**Visit for a list of eligible projects in the 5th District**)

**Description:** The superfund remedial program addresses contamination from uncontrolled releases at hazardous and toxic waste sites that threaten human health and environment

## Section II - Energy

### Alternative and Renewable Energy Programs

#### **BY FORMULA**

The American Recovery and Reinvestment Act provides investments in areas critical to the development of clean and efficient, American energy. The Recovery Act allocates \$16.8 billion for various programs within the U.S. Department of Energy. Most of the funds are specified for the Office of Energy Efficiency and Renewable Energy (EERE). For additional information, visit <http://www.eere.energy.gov/>

#### **State Energy Program (SEP)**

*\$55.8 million for Massachusetts to address the state's energy priorities and provide funding to adopt emerging renewable energy and energy efficiency technologies*

**Agency:**

U.S. Department of Energy (DOE)

[http://apps1.eere.energy.gov/state\\_energy\\_program/projects\\_all\\_by\\_state.cfm/state=MA](http://apps1.eere.energy.gov/state_energy_program/projects_all_by_state.cfm/state=MA)

**Administrator:**

Massachusetts Executive Office of Energy and Environment

<http://www.mass.gov/?pageID=eoeeahomepage&L=1&L0=Home&sid=Eoeea617.626.1000>

**Eligibility:** States use grants to address energy priorities and program funding to adopt emerging renewable energy and energy efficiency technologies.

**Description:** Funds are distributed via formula to state energy offices, which then administer the program. The Recovery Act also stipulates that \$3.1 billion of EERE funds go toward the State Energy Program for additional grants that do not need to be matched with state funds, but only allows such grants for states that intend to adopt strict building energy codes and intend to provide utility incentives for energy efficiency measures. To help states implement the measures, a separate portion of the act allocates \$500 million to the Department of Labor to prepare workers for careers in energy efficiency and renewable energy.

#### **Weatherization Assistance Program (WAP)**

*\$124.7 million for Massachusetts for low-income home weatherization*

**Agency:**

U.S. Department of Energy (DOE)

<http://apps1.eere.energy.gov/weatherization/>

**Administrator:**

Massachusetts Department of Housing and Community Development

[http://www.mass.gov/?pageID=ehedterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd\\_cd\\_wap\\_wap&csid=Ehed](http://www.mass.gov/?pageID=ehedterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd_cd_wap_wap&csid=Ehed)

HEATLINE at 800.632.8175 for Individuals

**Eligibility:** Funds are distributed via formula to states, which then administer the program.

**Description:** In Massachusetts, the Department of Housing and Community Development sets up local entities where people can apply. The weatherization funding for each individual house has been increased from \$2,000 to \$6,500. *Note: This funding is limited to residential buildings. The only other funding listed under the weatherization program is \$100 billion for the Sustainable Energy Resources for Consumers, a competitive grant process that allows states to use the funds to further weatherize homes and public buildings with technologies that aren't defined under WAP.*

### **Energy Efficiency and Conservation Block Grants (EECBG)**

*\$3.2 billion to assist eligible entities in implementing energy efficiency and conservation strategies*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

[http://apps1.eere.energy.gov/wip/block\\_grants.cfm](http://apps1.eere.energy.gov/wip/block_grants.cfm)

**Eligibility:** The grants will go toward states, local governments, and tribal governments to support the development of energy efficiency and conservation strategies and programs.

**Description:** Energy Efficiency and Conservation Block Grants, were established in the Energy Independence and Security Act of 2007, but were not previously funded. The grants will include energy audit programs and projects to install fuel cells and solar, wind, and biomass power projects at government buildings. For background on the program, see pages 176-183 of the Energy Independence and Security Act of 2007 ([PDF 821 KB](#)).

Funds are distributed via formula to cities and counties and to states for subgrants to non-formula communities. Additional funds are distributed through a competitive grant program (see below). While the Weatherization program is limited to residences, the EECBG program language is broad enough that it could be used for a number of eligible activities including: developing and implementing an energy efficiency and conservation strategy; retaining technical consultant services to assist the eligible entity in the development of such a strategy; encouraging behavioral changes among the population served by the eligible entity; conducting residential and commercial building energy audits; establishing financial incentive programs for energy efficiency improvements; providing grants to nonprofit organizations and governmental agencies for the purpose of performing energy efficiency retrofits; developing infrastructure, such as bike lanes and pathways and pedestrian walkways; synchronizing traffic signals; and other measures that increase energy efficiency and decrease energy consumption; developing, implementing, and installing on or in any government building of the eligible entity of onsite renewable energy technology that generates electricity from renewable resources. And so forth.

***BY COMPETITION*****Energy Efficiency and Renewable Energy (EERE)**

*\$16.8 billion was included for EERE*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

<http://www.eere.energy.gov/>

Energy Information Center

877.337.3463

<http://www1.eere.energy.gov/informationcenter/>

**Description:** While the bulk of the new EERE funding supports direct grants and rebates, \$2.5 billion will support EERE's applied research, development, and deployment activities, including \$800 million for the Biomass Program, \$400 million for the Geothermal Technologies Program, and \$50 million for efforts to increase the energy efficiency of information and communications technologies.

An additional \$400 million will support efforts to add electric technologies to vehicles. The act also directs \$2 billion in EERE funds toward grants for the manufacturing of advanced battery systems and components within the United States, as well as the development of supporting software. The battery grants will support advanced lithium-ion batteries and hybrid electric systems.

Another \$300 million will support an Alternative Fueled Vehicles Pilot Grant Program, and an additional \$300 million will support rebates for energy efficient appliances, while also supporting DOE's efforts under the Energy Star Program.

To date, no further details have been released about this program.

**Energy Efficiency and Conservation Block Grants (EECBG)**

*\$400 million nationwide to be administered through a competitive grant program to promote energy efficiency and conservation strategies*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

[http://apps1.eere.energy.gov/wip/block\\_grants.cfm](http://apps1.eere.energy.gov/wip/block_grants.cfm)

Energy Information Center

877.337.3463

**Eligibility:** Eligible entities include local governments not covered under formula distribution.

**Biomass Program**

*\$800 million to be dedicated to projects related to bio Massachusetts*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

<http://www1.eere.energy.gov/biomass/>

Energy Information Center

877.337.3463

<http://www1.eere.energy.gov/informationcenter/>

**Eligibility:** For research, development and demonstration for converting biomass resources to biofuels.

[http://www1.eere.energy.gov/biomass/financial\\_opportunities.html](http://www1.eere.energy.gov/biomass/financial_opportunities.html)

**Description:** The Department of Energy (DOE)'s **e-center** contains information on doing business with the agency. The e-center allows you to search by keyword and view renewable energy funding opportunities, register to submit proposals, and obtain information and guidance on the acquisition and financial assistance award process. This database provides accurate, up-to-date information on all solicitations offered by the Department of Energy, including those offered by the EERE Biomass Program, Office of Science, and others. DOE also provides this information to the central database for all federal government grants, [grants.gov](http://grants.gov).

**Geothermal Technologies Program**

*\$400 million to be dedicated for geothermal activities and projects*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

<http://www1.eere.energy.gov/geothermal/>

Energy Information Center

877.337.3463

<http://www1.eere.energy.gov/informationcenter/>

**Eligibility:** For research, development and demonstration efforts that emphasize the advancement of enhanced geothermal systems.

<http://www1.eere.energy.gov/geothermal/financial.html>

**Description:** The Department of Energy (DOE)'s **e-center** contains information on doing business with the agency. The e-center allows you to search by keyword and view renewable energy funding opportunities, register to submit proposals, and obtain information and guidance on the acquisition and financial assistance award process. This database provides accurate, up-to-date information on all solicitations offered by the Department of Energy, including those offered by the EERE Biomass Program, Office of Science, and others. DOE also provides this information to the central database for all Federal government grants, [grants.gov](http://grants.gov).

**Advanced Battery Manufacturing**

*\$2 billion was included for Advanced Battery Manufacturing grants to support the manufacturing of advanced vehicle batteries and components*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

<http://www.eere.energy.gov>

Energy Information Center

877.337.3463

<http://www1.eere.energy.gov/informationcenter/>

**Eligibility:** For the manufacturing of advanced batteries and components; and to provide facility funding for the manufacturing of advanced battery systems and components within the United States, as well as the development of supporting software. The battery grants will support advanced lithium-ion batteries and hybrid electric systems.

**Description:** The Department of Energy (DOE)'s **e-center** contains information on doing business with the agency. The e-center allows you to search by keyword and view renewable energy funding opportunities, register to submit proposals, and obtain information and guidance on the acquisition and financial assistance award process. This database provides accurate, up-to-date information on all solicitations offered by the Department of Energy, including those offered by the EERE Biomass Program, Office of Science, and others. DOE also provides this information to the central database for all Federal government grants, [grants.gov](http://grants.gov).

**Alternative Fueled Vehicle Pilot Grant Program**

*\$300 million was included to establish the DOE Clean Cities Program to encourage the use of plug-in electric drive vehicles or other emerging electric vehicle technologies*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE), Clean Cities Program

<http://www.eere.energy.gov/cleancities>

Energy Information Center

877.337.3463

<http://www1.eere.energy.gov/informationcenter/>

**Eligibility:** State governments, local governments, metropolitan transportation authorities, air pollution control districts and private or nonprofit entities.

**Description:** May be used for the acquisition of alternative fueled vehicles, fuel cell vehicles of hybrid vehicles, including buses for public transportation and ground support vehicles at public airports. The installation or acquisition of infrastructure necessary to directly support an alternative fueled vehicle, fuel cell vehicle, or hybrid vehicle project funded by the grant is also eligible.

**Transportation Electrification**

*\$400 million for Transportation Electrification grant projects*

**Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE), Clean Cities Program

<http://www.eere.energy.gov>

Energy Information Center

877.337.3463

<http://www1.eere.energy.gov/informationcenter/>

**Eligibility:** State and local governments and metropolitan transportation authorities.

**Description:** To implement a grant program for qualified electric transportation projects that reduce emissions, including shipside electrification of vehicles, truck stop electrification, airport ground support equipment and cargo handling equipment.

**Smart Grid Investment Program**

*\$4.5 billion was included for the Smart Grid Investment Program*

**Agency:**

U.S. Department of Energy (DOE), Office of Electricity Delivery and Energy Reliability

<http://www.oe.energy.gov/smartgrid.htm>

202.586.1411

[http://www.oe.energy.gov/information\\_center/american\\_reinvestment\\_act.htm](http://www.oe.energy.gov/information_center/american_reinvestment_act.htm)

**Description:** Most of the money is allocated to the Dept. of Energy, which has 60 days to formulate the regulations. These projects are expected to be regionally unique demonstrations to quantify smart grid costs and benefits, verify smart grid technology viability, and validate new smart grid business models including application of cyber security measures, at a scale that can then be readily planned and replicated around the country. In accordance with Section 1304 (b) of the Energy Independence and Security Act of 2007 (EISA 2007), whereby DOE will establish a smart grid regional demonstration initiative to achieve the Initiative goals defined in 1304 (b). This will include collaborations with the Power Marketing Administrations.

DOE plans to make the Funding Opportunity Announcement available in March, 2009. The Funding Opportunity Announcement will be available for viewing at Grants.gov (<http://www.grants.gov>) and at the DOE's Industry Interactive Procurement Systems (IIPS) or "e-center" (<https://e-center.doe.gov>). Applicants are strongly encouraged to register at these sites to receive notification of announcements posted by the National Energy Technology Laboratory. When the Funding Opportunity Announcement is released, applications will only be received through Grants.gov.

**Fossil Energy Research and Development Program***\$3.4 billion was included for Fossil Energy Research and Development Program***Agency:**

U.S. Department of Energy (DOE), Office of Fossil Energy

<http://www.fossil.energy.gov>

202.586.6660

**Administrator:**

Massachusetts Department of Energy and Environmental Affairs

<http://www.mass.gov/?pageID=eoeesubtopic&L=5&L0=Home&L1=Energy%2C+Utilities+%26+Clean+Technologies&L2=Energy+Efficiency&L3=Residential+%26+Business+Energy+Efficiency&L4=Energy+Efficiency+for+Your+Home&sid=Eoe+ea>

617.626.1000

**Description:** In response to the Recovery Act, the Department of Energy's (DOE) National Energy Technology Laboratory intends to issue, on behalf of the DOE Office of Fossil Energy, four Funding Opportunity Announcements for improving techniques to clean or capture and store the emissions from coal-fired power plants and other industrial sources (e.g., cement plants, chemical plants, refineries, etc.). The areas of interest include: Geologic Sequestration Training and Research; Carbon Capture and Sequestration (CCS) from Industrial Sources; Site Characterization of Promising Geologic Formations for CO<sub>2</sub> Storage; and Amendment to Re-Open the FOA "Clean Coal Power Initiative - Round 3"

The Funding Opportunity Announcement will be available for viewing at Grants.gov <http://www.grants.gov> and at FedConnect <https://www.fedconnect.net/FedConnect>. Applicants are strongly encouraged to register at these sites to receive notification of announcements posted by the National Energy Technology Laboratory. When the Funding Opportunity Announcement is released, applications will only be received through Grants.gov.

**Science Program***\$1.6 billion was included for the Science Program***Agency:**

U.S. Department of Energy (DOE), Office of Science

<http://www.science.doe.gov>

202.586.5430

<http://www.science.doe.gov/grants/grants.html>**Eligibility:**

Colleges and universities, non-profit organizations, for-profit commercial organizations, state and local governments, and unaffiliated individuals.

**Description:** The Office of Science manages fundamental research programs in basic energy science, biological and environmental sciences, and computational science.

**Advanced Research Projects Agency (ARPA-E)***\$400 million was included for ARPA-E***Agency:**

U.S. Department of Energy (DOE)

<http://www.energy.gov>

800.342.5363

**Eligibility:** Awards to institutions of higher education, companies, research foundations, trade and industry research collaborations, or consortia of such entities, which may include federally-funded research and development centers.

**Description:** To support high-risk, high-payoff research to accelerate the innovation cycle for both traditional and alternative energy sources and energy.

***BONDS AND TAX CREDIT PROGRAMS*****Clean Renewable Energy Bonds (CREBs)***\$1.6 billion was included for CREBs***Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

800.829.4933

The following website provides guidance on how the program was previously administered: [http://www.irs.gov/irb/2009-06\\_IRB/ar09.html](http://www.irs.gov/irb/2009-06_IRB/ar09.html).

**Eligibility:** Qualified facilities are those that generate electricity from the following sources: wind; closed-loop biomass' open-loop biomass' geothermal' small irrigation; hydropower; landfill gas; marine renewable; and trash combustion facilities.

**Description:** The Energy Policy Act of 2005 created a tax-credit bond to finance qualified renewable energy facilities. These bonds are unique because unlike normal bonds, CREBs are tax credit bonds and they pay the bondholders by providing a credit against their federal income tax. In effect, the CREBs will provide interest-free financing for certain renewable energy projects. Since the federal government essentially pays the interest via tax credits, the Internal Revenue Service (IRS) needs to allocate such credits in advance to the lending authorities.

The American Recovery and Reinvestment Act authorizes an additional \$1.6 billion for these bonds. Furthermore, this new authorization is subdivided into thirds: 1/3 will be available for qualifying projects of State/local/tribal governments; 1/3 for qualifying projects of public power providers; and 1/3 for qualifying projects of electric cooperatives.

To date, no further details have been released about this program.

**Qualified Energy Conservation Bonds (\$2.4 billion)***\$2.4 billion was included for Qualified Energy Conservation Bonds***Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

800.829.4933

**Eligibility:** The definition of qualified energy conservation projects is fairly broad and contains elements relating to energy efficiency capital expenditures in public buildings; renewable energy production; various research and development applications; mass commuting facilities that reduce energy consumption; several types of energy-related demonstration projects; and public energy efficiency education campaigns.

**Description:** The Qualified Energy Conservation Bonds are tax credit bonds that are similar to Clean Renewable Energy Bonds. These bonds are available for a different type of qualified renewable energy project.

The American Recovery and Reinvestment Act provides \$2.4 billion and modifies this bond program so that qualified energy conservation bonds may be issued to make loans and grants for capital expenditures to implement green community programs and can be used for programs in which utilities provide ratepayers with energy-efficient property and recoup the costs of that property over an extended period of time.

To date, no further details have been released about this program.

**Energy Efficient Appliance Rebate Program and Energy Star Program***\$300 million was included for these programs***Agency:**

U.S. Department of Energy (DOE), Office of Energy Efficiency and Renewable Energy (EERE)

<http://www.energystar.gov/>

ENERGY STAR HOTLINE 888.782.7937

<http://apps1.eere.energy.gov/states/alternatives/rebates.cfm>**Administrator:**

Department of Energy and Environmental Affairs

<http://www.mass.gov/?pageID=eoeasubtopic&L=5&L0=Home&L1=Energy%2C+Utilities+%26+Clean+Technologies&L2=Energy+Efficiency&L3=Residential+%26+Business+Energy+Efficiency&L4=Energy+Efficiency+for+Your+Home&sid=Eoea>

**Eligibility:** Individuals and Families

**Description:** ENERGY STAR is a joint program of the U.S. Environmental Protection Agency and the U.S. Department of Energy helping individuals and families save money and protect the environment through energy efficient products and practices. The existing law provides a tax credit equal to 10% of the amount paid or incurred by the taxpayer for qualified energy efficiency improvements installed during the taxable year. The credit is capped depending on what item is purchased. Congress must reauthorize

these tax credits periodically. The American Recovery and Reinvestment Act extends these tax credits through 2010. In addition, it increases the amount of the tax credit to 30% of qualified energy efficiency improvements during the taxable year. Furthermore, this legislation implements a flat tax credit rate cap of \$1,500 on all qualifying purchases.

### Alternative Fuel Vehicle Refueling Property

**Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

800.829.4933

The following website provides guidance on how the tax credit was administered in 2007, [http://www.irs.gov/irb/2007-22\\_IRB/ar10.html](http://www.irs.gov/irb/2007-22_IRB/ar10.html).

**Eligibility:** The alternative refueling property credit provides a tax credit to businesses (example: gas stations) and individuals that install alternative fuel pumps, such as fuel pumps that dispense E-85 fuel, electricity, hydrogen, and natural gas.

**Description:** The American Recovery and Reinvestment Act increases the current 30% alternative refueling property credit for businesses (capped at \$30,000) to 50% (capped at \$50,000). Hydrogen refueling pumps would remain at a 30% credit; however, the cap for hydrogen refueling pumps is increased to \$200,000. In addition, the Recovery Act increases the alternative refueling property credit for individuals from 30% to 50% (capped at \$2,000). In previous years, individuals who were seeking this tax credit had to submit an Internal Revenue Service (IRS) Form 8911 when they filed their taxes.

To date, no further details have been released about this program.

### Plug-in Electric Drive Vehicle Credit

**Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

800.829.4933

**Eligibility:** Late last year, Congress passed into a law a tax credit for qualified plug-in electric drive vehicles.

**Description:** Batteries of at least 4 kWh qualify for a \$2,500 credit. An additional \$417 is provided for each additional kWh, up to \$7,500 for vehicles up to 10,000 lbs. Vehicles up to 14,000 lbs qualify for a \$10,000 credit. Vehicles between 14,000 and 26,000 lbs qualify for a \$12,500 credit. Vehicles over 26,000 lbs qualify for a \$15,000 credit. The American Recovery and Reinvestment Act modifies this existing law by limiting the maximum credit to \$7,500 regardless of vehicle weight and eliminates the credit for vehicles weighing 14,000 lbs or more.

**Advanced Energy Investment Credit (\$2.3 billion)****Agency:**

U.S. Department of the Treasury

<http://www.ustreas.gov><http://www.energy.gov>

**Eligibility:** Establishes a new 30% investment tax credit for facilities engaged in the manufacturing of advanced energy project.

**Description:** A qualified advanced energy project is project that re-equips, expands, or establishes a manufacturing facility for the production of property designed to be used:

\*To produce energy from the sun, wind, or geothermal deposits or other renewable resources

\*Fuel cells, microturbines, or an energy storage system for use with electric or hybrid-electric motor vehicles

\*Electric grids to support the transmission of intermittent sources of renewable energy, including storage of such energy

\*Property designed to capture and sequester car dioxide

\*Property designed to refine or blend renewable fuels (excluding fossil) or to produce energy conservation technologies

\*Other advanced energy property designed to reduce greenhouse gas emissions as determined by the Secretary

Qualified property must be depreciable property used in a qualified advanced energy project. Qualified property does not include property designed to manufacture equipment for use in the refining or blending of any transportation fuel other than renewable fuels. Credits are only available for projects certified by the Secretary of Treasury & Secretary of Energy through a competitive bidding process. 180 days after enactment, the Secretary of Treasury must establish a certification program.

**Parity for Transit Benefits****Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

800.829.4933

For information about how the Internal Revenue Service (IRS) administered this program in 2008, you can view IRS Publican 15-B at [http://www.irs.gov/pub/irs-pdf/p15b\\_08.pdf](http://www.irs.gov/pub/irs-pdf/p15b_08.pdf).

**Eligibility:** Current law provides a tax-free fringe benefit employers can provide to employees for transit and parking.

**Description:** Those benefits are set at different dollar amounts. The American Recovery and Reinvestment Act would equalize the tax-benefit employers can provide for transit and parking. The proposal sets both the parking and transit benefits at \$230 a month for 2009, indexes them equally for 2010, and clarifies that certain transit benefits apply to federal employees.

To date, no further details have been released about this program for 2009.

## Section III - Education and the Arts

Education Programs; Child Care; The Arts

### **BY FORMULA**

#### **State Fiscal Stabilization Fund**

*\$999.26 million for Mass., of which 81.8% must go to filling the state's education budget shortfalls*

Funds are apportioned to local school districts according to their state's "primary elementary and secondary funding formulae" and to public institutions of higher learning in the amounts "needed to restore State support for such institutions." School districts may use the funds they receive for "any activity authorized by the ESEA/NCLB, IDEA, the Adult and Family Literacy Act, and the Perkins Career and Technical Education Act, or for modernization, renovation, and repairs of public school facilities (including charter schools), which may include modernization, renovation, and repairs consistent with a recognized green building rating system."

The remaining 18.2% may be used "for public safety and other government services, which may include assistance for elementary and secondary education, and for modernization, renovation, or repair of public school facilities and institutions of higher education facilities, including modernization, renovation, and repairs that are consistent with a recognized green building rating system." The states have significant discretion in distributing this portion.

**Title I-A:** *\$209 million for Massachusetts*

**IDEA-Part B:** *\$280 million for Massachusetts*

<p><b>Agency:</b> U.S. Department of Education (ED) <a href="http://www.ed.gov/policy/gen/leg/recovery/index.html">http://www.ed.gov/policy/gen/leg/recovery/index.html</a></p>
<p>Title I / IDEA school district-specific amounts can be found on the House Education/Labor Committee website: <a href="http://edlabor.house.gov/documents/111/pdf/publications/MASSACHUSETTS-20090213-HR1-LEAs.pdf">http://edlabor.house.gov/documents/111/pdf/publications/MASSACHUSETTS-20090213-HR1-LEAs.pdf</a></p>
<p><b>Eligibility:</b> School districts</p>
<p><b>Description:</b> School districts will receive this boost from the recovery package through the same channels that they currently receive their funds. According to recently released guidance issued by ED, the first 50% will be disbursed by the end of March. For additional details, please see the Department's recovery page.</p>

#### **EdTech**

*\$10.3 million for Massachusetts in education technology funds*

<p><b>Agency:</b> U.S. Department of Education <a href="http://www.ed.gov/policy/gen/leg/recovery/index.html">http://www.ed.gov/policy/gen/leg/recovery/index.html</a></p>
<p><b>Eligibility:</b> State educational agencies (SEAs) and local educational agencies (LEAs)</p>

**Description:** To purchase up-to-date computers and software and provide professional development to ensure the technology is used effectively in the classroom. The EdTech program provides funds to state educational agencies (SEAs) and local educational agencies (LEAs) to increase access to educational technology, support the integration of technology into instruction, enhance technological literacy, and support technology-related professional development of teachers. Funds are allocated to states in proportion to Title I-A amounts, with a state minimum amount of 0.5% of total funding for state grants.

### Head Start/Early Head Start

*\$10.1 million for Massachusetts*

**Agency:**

U.S. Department of Health and Human Services (DHHS)

<http://eclkc.ohs.acf.hhs.gov/hslc>

**Eligibility:** Head Start Programs

Current Head Start programs: <http://eclkc.ohs.acf.hhs.gov/hslc/HeadStartOffices>

**Description:** Head Start provides development, educational, health, nutritional, social and other activities that prepare children to succeed in school. Federal Head Start funds are provided directly to local programs, rather than through states. Programs are locally designed and are administered by a network of over 1,600 public and private nonprofit and for-profit agencies.

### Education for Homeless Children and Youth

*\$70 million in formula funding to the states*

**Agency:**

U.S. Department of Education

<http://www.ed.gov/programs/homeless/index.html>

**Eligibility:** State Education Agencies

**Description:** Funds to provide services to homeless children including meals and transportation when high unemployment and home foreclosures have created an influx of homeless children.

### Child Care and Development Block Grants (CCDBG)

*\$24 million for Mass*

**Agency:**

U.S. Department of Health and Human Services (DHHS), Administration for Children and Families (ACF)

<http://www.acf.hhs.gov/programs/ccb/ccdf/index.htm>

**Administrator:**

Massachusetts Department of Early Education and Care

<http://www.eec.state.ma.us/docs/HowToContactEEC.pdf>

360 Merrimack Street, Building 9, Third Floor, Entrance I

Lawrence, MA 01843  
978.681.9684

**Eligibility:** Funds are distributed via formula to states, which then allocate funds to local entities.

**Description:** To subsidize the child care expenses of families with children under age 13, if the parents are working or in school, and family income is less than 85% of the state median.

### Community Services Block Grants (CSBG)

*\$25.1 million for Mass*

**Agency:**

U.S. Department of Health and Human Services (DHHS), Administration for Children and Families (ACF)

<http://www.acf.hhs.gov/programs/ocs/csbg/>

202.401.4830

**Administrator:**

Massachusetts Department of Housing and Economic Development

<http://www.mass.gov/?pageID=eheadhomepage&L=1&L0=Home&sid=Ehed>

617.573.1100

**Eligibility:** Funds are distributed via formula to states, which then allocate funds to local community action agencies. CSBG funding is distributed to 24 designated Community Action Agencies based on a historical formula.

**Description:** To subsidize services such as housing and mortgage counseling, jobs skills training, food pantry assistance, and benefits outreach and enrollment for low-income families hurt by the economic crisis. States are required to use 1% of their recovery package allotments for “benefit eligibility coordination” activities related to identification and enrollment of eligible individuals and families in federal state or local benefit programs.

### ***BY COMPETITION***

### Teacher Quality Enhancement Competitive State Grants

*\$100 million was included for the program*

**Agency:**

U.S. Department of Education, Office of Postsecondary Education

[www.ed.gov/programs/heatqp/eligibility.html](http://www.ed.gov/programs/heatqp/eligibility.html)

202.502.7676

**Eligibility:** State Education Agencies

**Description:** Competitive grants to states support the implementation of comprehensive statewide reforms to improve the quality of the funded states' teaching forces. By law, state activities may include efforts to: strengthen teacher certification standards; hold institutions of higher education accountable for high-quality teacher preparation; establish or strengthen alternative pathways into teaching; recruit teachers for high-poverty urban and rural areas; and address the problem of social promotion.

States may use grant funds to reform teacher licensing and certification requirements; provide alternative methods of teacher preparation; and provide alternative routes to State certification. The funds provided in the economic recovery bill will assist States in modernizing the teaching workforce, address teacher shortages, and provide new routes to teaching for jobless individuals seeking to enter the teaching field.

### **Statewide Longitudinal Data Systems Grant Program**

*\$250 million was included in competitive grants*

**Agency:**

U.S. Department of Education, Institute of Education Sciences

<http://nces.ed.gov/programs/slds/>

202.502.7300

**Eligibility:** Competitive grants to States to enable them to design and develop statewide longitudinal data systems that use individual student data for reporting and improving student achievement.

**Description:** With these grants, states could increase the capacity of their data systems, provide teachers the information they need to tailor instruction to help each student improve and give administrators the resources and information to effectively and efficiently manage their data systems.

### **National Science Foundation**

*\$3 billion nationwide for scientific research*

**Agency:**

National Science Foundation (NSF)

<http://www.nsf.gov/recovery/>

**Eligibility:** Multiple grant opportunities with different eligibility requirements.

**Description:** The \$3 billion provided to NSF will go directly to the nation's best and brightest researchers at the forefront of promising discoveries, to deserving graduate students at the start of their careers, and to developing advanced scientific tools and infrastructure that will be broadly available to the research community.

Programs authorized by the 2007 America COMPETES Act (PL 110-69), the construction of research facilities, and education and human resources programs.

To date, no further details have been released about this program. Funding opportunities through the National Science Foundation are announced on the following websites:

[Grants.gov](#), [FastLane](#), [Research.gov](#)

### **National Endowment for the Arts (NEA)**

*\$30 million included for competitive awards through the NEA*

**Agency:**

National Endowment for the Arts (NEA), National Foundation on the Arts and Humanities

<http://www.nea.gov/grants/apply/recovery/index.html>

202.682.5400

**Eligibility:** The National Endowment for the Arts is uniquely positioned to fund arts projects and activities that preserve jobs in the nonprofit arts sector threatened by declines in philanthropic and other support during the current economic downturn. As part of this important investment, the Arts Endowment has designed a plan to expedite distribution of critical funds for the national, regional, state, and local levels for projects that focus on the preservation of jobs in the arts.

**Description:** This program will be carried out through one-time grants to eligible nonprofit organizations including arts organizations, local arts agencies, statewide assemblies of local arts agencies, arts service organizations, units of state or local government, and a wide range of other organizations that can help advance the goals of the Arts Endowment and this program. Grants will be made either to organizations for their own job preservation projects, or to designated local arts agencies, eligible to subgrant, for subgranting programs to eligible nonprofit organizations (see "Subgranting Funds" below).

All applicants must be previous NEA award recipients from the past four years (see "Applicant Eligibility" for more information). In addition, organizations are limited to receiving NEA American Recovery and Reinvestment Act funds through only one source – from the Arts Endowment directly, or directly through an entity eligible to subgrant NEA funds including a state arts agency, a regional arts organization of state arts agencies, or a designated local arts agency that is eligible to subgrant or regrant funds.

Organizations are required to submit their applications electronically through Grants.gov, the federal government's online application system. The [www.grants.gov](http://www.grants.gov) system must receive your application no later than 11:59 p.m., Eastern Time, on April 2, 2009.

### **New England Foundation for the Arts**

*\$20 million included for state art agencies and regional arts organizations*

**Agency:**

National Endowment for the Arts (NEA), National Foundation on the Arts and Humanities

<http://www.nea.gov/grants/apply/recovery-states/index.html>

**Administrator:**

New England Foundation for the Arts

<http://www.nefa.org/>

617.951.0010

**Eligibility:** As partners of the Arts Endowment, the state arts agencies (SAAs) and regional arts organizations (RAOs) have an important role to play in advancing the goals of this program. The NEA will award American Recovery and Reinvestment Act funds to the SAAs and RAOs specifically for projects that focus on the preservation of jobs in the arts.

**Description:** Congress has prohibited the Arts Endowment from making grants for the purpose of subgranting, with exceptions only for state arts agencies, regional arts organizations, and local arts agencies designated to operate on behalf of local governments. These designated local arts agencies generally are arts councils, departments of cultural affairs, or arts commissions. If a designated local arts agency eligible to subgrant proposes a subgranting program, the subgranting program must be consistent with the purposes of the program outlined above.

No further information is available at this time. Please contact the New England Foundation for the Arts to determine eligibility.

### ***BY DEMAND***

#### **Pell Grants**

*\$15.64 billion was included for the Pell Grant program. \$200 million was included for the work-study programs. These additional funds will provide immediate financial relief to an additional 800,000 students and their families who are struggling to pay for the cost of a higher education during the economic downturn.*

#### **Agency:**

U.S. Department of Education, Federal Pell Grant Program

<http://www.ed.gov/programs/fpg/index.html>

800.433.3243 or 800.4FED.AID

**Eligibility:** The Federal Pell Grant Program provides need-based grants to low-income undergraduate and certain post-baccalaureate students to promote access to postsecondary education. Students may use their grants at any one of approximately 5,400 participating postsecondary institutions. Grant amounts are dependent on: the student's expected family contribution (EFC) (see below); the cost of attendance (as determined by the institution); the student's enrollment status (full-time or part-time); and whether the student attends for a full academic year or less.

Students may fill out the Free Application for Federal Student Aid (FAFSA) to determine if they are eligible to receive a Federal Pell Grant or Work-Study funds.

<http://studentaid.ed.gov/PORTALSWebApp/students/english/index.jsp>

800.433.3243 or 800.4FED.AID

**Description:** There are currently 103,000 Pell grant recipients in Massachusetts. Under the agreement, the maximum discretionary Pell grant would increase by \$500, to \$4,860, for the 2009-2010 academic year. The measure also includes \$1.5 billion in mandatory Pell grant funding, which would provide an increase of up to \$490 per year required by the College Cost Reduction and Access Act (PL 110-84). With mandatory funding included, the maximum Pell award would be \$5,350.

## Section IV - Employment

Workforce Development and Job Training; Unemployment Assistance

### ***BY DEMAND***

#### **Unemployment Insurance**

*Included provisions to extend the Emergency Unemployment Compensation Program and provides \$25 more a week in Unemployment Insurance Benefits to recipients*

Approximately 503,000 workers in Massachusetts who have lost their jobs in this recession are covered under the recovery package. In addition, the recovery package suspends the federal income tax on the first \$2,400 of benefits per recipient in 2009. The measure continues the current extension of unemployment insurance, which would otherwise be phased out at the end of March, through December 31. Current law provides unemployed workers with up to 33 weeks of extended benefits. The recovery package increases, through December 31, the current average unemployment insurance benefit by \$25 per week, to \$325 per week. The measure also provides one-time grants to encourage states to modernize their unemployment compensation systems in order to increase coverage among low-wage, part-time, and other jobless workers. The Department of Labor estimates that Massachusetts could receive \$163.7 million in new funding if Massachusetts fully enacts the UI modernization incentives that the legislation would provide.

**Administer:**

Massachusetts Division of Unemployment Assistance (DUA)

[http://www.mass.gov/?pageID=elwdagencylanding&L=4&L0=Home&L1=Government&L2=Departments+and+Divisions+\(EOLWD\)&L3=Division+of+Unemployment+Assistance&sid=Elwd](http://www.mass.gov/?pageID=elwdagencylanding&L=4&L0=Home&L1=Government&L2=Departments+and+Divisions+(EOLWD)&L3=Division+of+Unemployment+Assistance&sid=Elwd)

To File: 877.626.6800

Haverhill Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lawrence Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lowell Area: Career Center of Lowell

<http://www.cclowell.org>

978-458-2503

Southern Region of District: Career Center of North Central Massachusetts

<http://www.ccncm.com/>

978-534-1481

**Eligibility:** Unemployment Insurance is a temporary income protection program for workers who have lost their jobs but are able to work, available for work and looking for work.

**Description:** Congress has passed an expansion of the Emergency Unemployment Compensation (EUC) Program effective July 7, 2008 through March 28, 2009. On November 23, 2008, this federal extension was expanded to provide up to 20 additional weeks of unemployment benefits (this extension originally provided up to 13 additional weeks).

Effective February 15, 2009, up to an additional 13 weeks of Extended Benefits is available through the EUC Program.

### ***BY FORMULA***

#### **State Unemployment Insurance and Employment Service Operations Grants**

*\$8.3 million for Massachusetts to match unemployed individuals to job openings and provide customized reemployment services*

**Agency:**

U.S. Department of Labor (DOL)

[http://www.doleta.gov/programs/Wagner\\_Peyser.cfm](http://www.doleta.gov/programs/Wagner_Peyser.cfm)

**Administrator:**

Massachusetts Labor and Workforce Development

<http://www.mass.gov/?pageID=elwdhomepage&L=1&L0=Home&sid=Elwd>

**Eligibility:** State Employment Service Agencies

**Description:** Funds are distributed via formula to state employment service agencies. More than half of this appropriation is designated for expedited re-employment services for unemployment insurance claimants (including the integrated Employment Service and Unemployment Insurance information technology required to identify and serve the needs of such claimants).

#### **Dislocated Workers State Grants**

*\$18.7 million for Massachusetts*

**Agency:**

U.S. Department of Labor (DOL)

[http://www.doleta.gov/programs/general\\_info.cfm](http://www.doleta.gov/programs/general_info.cfm)

**Administrator:**

Massachusetts Labor and Workforce Development

<http://www.mass.gov/?pageID=elwdhomepage&L=1&L0=Home&sid=Elwd>

**Eligibility:** State Employment Service Agencies

**Description:** To provide training and related services to individuals who have lost their jobs and are unlikely to return to those jobs or similar jobs in the same industry. Funds are distributed via formula to states, which then allocate to local entities.

**Adult Employment and Training State Grants***\$10.2 million for Massachusetts***Agency:**

U.S. Department of Labor (DOL)

[http://www.doleta.gov/programs/general\\_info.cfm](http://www.doleta.gov/programs/general_info.cfm)**Administrator:**

Massachusetts Labor and Workforce Development

<http://www.mass.gov/?pageID=elwdhomepage&L=1&L0=Home&sid=Elwd>**Eligibility:** State Employment Service Agencies**Description:** To provide training and related services to individuals ages 18 and older. Funds are distributed via formula to states, which then allocate to local entities.**Youth Activities State Grants***\$25.1 million for Massachusetts***Agency:**

U.S. Department of Labor (DOL)

[http://www.doleta.gov/youth\\_services/](http://www.doleta.gov/youth_services/)**Administrator:**

Massachusetts Labor and Workforce Development

<http://www.mass.gov/?pageID=elwdhomepage&L=1&L0=Home&sid=Elwd>**Eligibility:** State Employment Service Agencies**Description:** To provide training and related services to low-income youth ages 14-21. Funds are distributed via formula to states, which then allocate to local entities.**Vocational Rehabilitation***\$7.9 million for Massachusetts***Administrator:**

Massachusetts Office of Education and Vocational Rehabilitation

<http://www.mass.gov/?pageID=elwdhomepage&L=1&L0=Home&sid=Elwd>**Eligibility:** State Employment Service Agencies**Description:** To help individuals with disabilities prepare for and sustain gainful employment through support for state leadership activities, administration of the state plan for vocational and technical education, and subgrants to eligible recipients to improve vocational and technical education programs. Funds are distributed via formula to states.**Job Corps Program***\$250 million for the Office of Job Corps***Agency:**

U.S. Department of Labor (DOL)

[www.jobcorps.gov](http://www.jobcorps.gov)

202.693.3000

**Description:** The funds will support construction and modernization of a network of residential facilities serving at-risk youth. The funds allow the Office of Job Corps to move forward on a number of ready-to-go projects.

### ***BY COMPETITION***

#### **Dislocated Worker Assistance National Reserve**

*\$200 million was included for DOL National Emergency Grants*

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/NEG>

877.US.2JOBS

Learn how to apply here: [http://www.doleta.gov/NEG/apply\\_neg.cfm](http://www.doleta.gov/NEG/apply_neg.cfm)

**Eligibility:** For Intrastate Projects: The designated state WIA program grantee agency; A LWIA (and its fiscal agent); A consortium of local boards for adjoining local areas; A designated organization receiving WIA funding through the Native American Program provision of the Act -- For Interstate Projects: A consortium of local boards for adjoining local areas; A consortium of states. An Individual: A dislocated worker under WIA Section 101(9).

<http://www.doleta.gov/NEG/eligibility.cfm>

**Description:** These funds will allow the Secretary of Labor to award national emergency grants to respond to plant closings, mass layoffs and other worker dislocations.

#### **YouthBuild**

*\$50 million was included for YouthBuild Program*

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

[http://www.doleta.gov/youth\\_services/youthbuild.cfm](http://www.doleta.gov/youth_services/youthbuild.cfm)

877.US.2JOBS

**Administrator:**

CTI YouthBuild of Greater Lowell

<http://www.comteam.org/>

978.446.9803

YouthBuild Lawrence

978.681.0548

**Description:** Provides services for at-risk youth, who gain education and occupational credentials while constructing or rehabilitating affordable housing. The conference agreement includes language to allow YouthBuild grantees to serve individuals who have dropped out of school and reenrolled in an alternative school, if that reenrollment is part of a sequential service strategy.

**Green Jobs Training**

*\$500 million was included for grants to train workers in energy efficiency and renewable energy jobs*

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

**Description:** ETA will be a key resource to the Administration's "Green Jobs" initiative. The Green Jobs Act (2007) would support on-the-ground apprenticeship and job training programs to meet growing demand for green construction professionals skilled in energy efficiency and renewable energy installations. The Act envisions sound and practical energy investments for 3 million new jobs by helping companies retool and retrain workers to produce clean energy and energy efficient components or end products that will result in residential and commercial energy savings, industry revenue, and new green jobs throughout the country.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.doleta.gov/>

**Trade Adjustment Assistance (TAA)**

*All TAA programs are reauthorized through Dec. 31, 2010*

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

Application Process: <http://www.doleta.gov/tradeact/petitions.cfm>

**Description:** Current Trade Adjustment Assistance is expanded to trade-affected services sector workers and workers affected by offshoring or outsourcing to all countries, including China or India. Training funds available to states are increased by 160%, to \$575 million a year, and a new TAA program is created for trade-affected communities. In addition, the reauthorization allows for automatic TAA eligibility for workers suffering from import surges and subject to unfair trade determinations, makes training, healthcare and re-employment TAA benefits more accessible and flexible, and enhances benefits in the TAA for Firms and TAA for Farmers programs.

The current TAA program (before reauthorization) is described at

<http://www.doleta.gov/tradeact/taa/WhoWeServe.cfm>.

**Community Service Employment for Older Americans**

*\$120 million is provided for the program*

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

For part-time employment opportunities for low income seniors, as described at <http://www.doleta.gov/seniors/>

**Description:** The Senior Community Service Employment Program (SCSEP) is a community service and work based training program for older workers. It was authorized by Congress in Title V of the Older Americans Act of 1965 to provide subsidized, part-time, community service work based training for low-income persons age 55 or older who have poor employment prospects. Through this program, older workers have access to the SCSEP services as well as other employment assistance available through the One-Stop Career Centers of the workforce investment system.

Haverhill Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lawrence Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lowell Area: Career Center of Lowell

<http://www.cclowell.org>

978-458-2503

Southern Region of District: Career Center of North Central Massachusetts

<http://www.ccncm.com/>

978-534-1481

## ***TAX CREDIT PROGRAMS***

### **Work Opportunity Tax Credit (WOTC)**

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

[www.irs.gov](http://www.irs.gov)

WOTC is described at <http://www.doleta.gov/business/incentives/opptax/>

**Description:** A new targeted group is created for WOTC, which provides a tax credit to employers who hire members of targeted groups. The new group is unemployed veterans and disconnected youth who begin work in 2009 and 2010. The credit applies to individuals who begin work for the employer after December 31, 2008.

## Section V - Public Safety

Law Enforcement Programs; Firefighter Assistance; Violence Against Women

### *BY FORMULA*

#### **State Fiscal Stabilization Fund**

*\$999.26 million for Mass., of which the majority must go to filling the state's education budget shortfalls but of which 18.2% is intended "for public safety and other government services."*

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

**Administrator:**

Massachusetts Governor Deval Patrick

<http://www.mass.gov/?pageID=gov3subtopic&L=4&L0=Home&L1=Key+Priorities&L2=Job+Creation+%26+Economic+Growth&L3=Massachusetts+Recovery+and+Reinvestment+Plan&sid=Agov3>

**Eligibility:** States will receive formula funding

**Description:** The fund is intended to provide fiscal relief to the states to prevent tax increases and cutbacks in critical education, public safety, and other services. The states have significant discretion in using this money.

#### **Edward Byrne Memorial Justice Assistance Grant (Byrne/JAG).**

*\$2 billion nationwide*

**Agency:**

U.S. Department of Justice (DOJ)

<http://www.ojp.usdoj.gov/recovery/>

**Eligibility:** Formula funding to state and local police forces

**Description:** To support local law enforcement efforts—with emphasis on violent crime and serious offenders. Funds are distributed via formula to states for use by states and units of local government. Grants may be used to provide personnel, equipment, training, technical assistance, and information systems for more widespread apprehension, prosecution, adjudication, detention, and rehabilitation of offenders who violate such state and local laws. Grants also may be used to provide assistance (other than compensation) to victims of these offenders. The recovery package also appropriated funds for a competitive grant program (see below).

#### **STOP Violence Against Women Formula Grant Program**

*\$225 million for victim services programs*

**Agency:**

U.S. Department of Justice (DOJ)

[http://www.ovw.usdoj.gov/stop\\_grant\\_desc.htm](http://www.ovw.usdoj.gov/stop_grant_desc.htm)

**Eligibility:** All states, territories, and the District of Columbia are eligible to apply for a STOP formula grant award. To be eligible for funds, states must meet all application requirements and must certify that they are in compliance with the statutory eligibility requirements of the Violence Against Women Act.

**Description:** STOP formula grants are intended for use by states and territories; state, local and tribal courts (including juvenile courts); Indian tribal governments; local governments; and nonprofit, nongovernment victim services programs. Recipients are required to meet one or more of 14 statutory purpose areas. These areas include, but are not limited to: training law enforcement officers, judges, court personnel and prosecutors; developing, enlarging, or strengthening victim services programs; developing, installing or expanding data collection; and developing, enlarging, or strengthening programs addressing stalking.

### **Violence Against Women Grants (VAWA)**

*\$100 million nationwide*

**Agency:**

U.S. Department of Justice (DOJ), Office for Victim's of Crimes

<http://www.ojp.gov/ovc/fund/Recoveryfunds.html>

**Eligibility:** Formula funding to state agencies

**Description:** The Recovery Act provides for \$100 million in funding for victim compensation and assistance. Of that \$100 million, \$47.5 million in formula funding will be directed to state agencies that administer VOCA-funded crime victim compensation programs, and an additional \$47.5 million in formula funding will be directed to state agencies that administer VOCA-funded crime victim assistance programs.

For detailed guidance on the application process, visit

<http://www.ojp.gov/ovc/fund/Recoveryfunds.html>

### ***BY COMPETITION***

### **Assistance to Firefighters Grant Program**

*\$210 million provided for these grants nationwide*

**Agency:**

U.S. Department of Homeland Security - Federal Emergency Management Agency (FEMA)

[www.firegrantsupport.com/AFG/](http://www.firegrantsupport.com/AFG/)

**Eligibility:** Fire Departments

**Description:** \$210 million nationwide in firefighter assistance grants for modifying, upgrading, or constructing state and local non-federal fire stations, provided that 5% be set aside for program administration and provided that no grant shall exceed \$15 million. Also includes waives the matching requirement for SAFER grants for hiring fire personnel in fiscal years 2009 and 2010. To provide assistance for communities to modify, upgrade or construct state and local fire stations.

Application materials are scheduled to be available before the end of March.

**Edward Byrne Memorial Justice Assistance Grant (Byrne/JAG).***\$225 million nationwide to support law enforcement efforts***Agency:**

U.S. Department of Justice (DOJ)

<http://www.ojp.usdoj.gov/BJA/recoveryact.html>**Eligibility:** Police Departments

**Description:** Byrne Competitive Grants are similar to JAG formula grants and are focused on ensuring job growth and job retention. However, instead of providing grants based on a formula, BJA administers these funds based on a competitive application process. These grants help state and local communities improve the capacity of local justice systems and may be used for national efforts such as training and technical assistance. Applicants may be national, regional, state, or local public and private entities, including for-profit (commercial) and nonprofit organizations, faith-based and community organizations, institutions of higher education, tribal jurisdictions, and units of local government that support the functioning of the criminal justice system. Information will be coming soon about how to apply for Byrne Competitive grants.

Application materials are scheduled to be available before the end of March.

**Community Oriented Policing Services (COPS)***\$1 billion nationwide for the COPS Hiring Recovery Program (CHRP)***Agency:**

U.S. Department of Justice (DOJ)

<http://www.ojp.usdoj.gov/BJA/recoveryact.html>**Eligibility:** Police Departments

**Description:** *CHRP* is a competitive grant program that provides funding directly to law enforcement agencies for the hiring and rehiring of additional career law enforcement officers. There is no local match requirement for *CHRP*, but grant funding will be based on current entry-level salaries and benefits packages.

Application materials are scheduled to be available before the end of March.

<http://www.cops.usdoj.gov/Default.asp?Item=2108>

**Violence Against Women Grants (VAWA)***\$100 million nationwide***Agency:**

U.S. Department of Justice (DOJ), Office for Victim's of Crimes

<http://www.ojp.gov/ovc/fund/Recoveryfunds.html>**Eligibility:** Private nonprofit organizations or public agencies

**Description:** The Recovery Act provides for \$100 million in funding for victim compensation and assistance. Of that \$100 million, \$47.5 million in formula funding will be directed to state agencies that administer VOCA-funded crime victim compensation programs, and an additional \$47.5 million in formula funding will be directed to state agencies that administer VOCA-funded crime victim assistance programs.

Five million dollars of the \$100 million will be directed to discretionary grant projects. That \$5 million will be used to make awards under the currently open **National Field-Generated Training, Technical Assistance and Demonstration Projects** (NFG) competitive grant solicitation that is listed under **current funding**. The February 24 deadline has been extended to March 24, 2009.

For detailed guidance on the application process, visit  
<http://www.ojp.gov/ovc/fund/dakit.htm#FY2009tta>

### **Transitional Housing Assistance Program**

*\$50 million nationwide*

**Agency:**

U.S. Department of Justice (DOJ), Transitional Housing Assistance Program

[http://www.ovw.usdoj.gov/thousing\\_grant\\_desc.htm](http://www.ovw.usdoj.gov/thousing_grant_desc.htm)

**Eligibility:** Competitive Grants to states, local government, Indian Tribes, nonprofits and services providers.

**Description:** May be used for transitional housing, short-term housing assistance, support services designed to enable individuals who are fleeing domestic violence, violence, sexual assault, or stalking to locate and secure permanent housing and integrate into a community by providing those individuals with services such as transportation, counseling, child care services, case management, employment counseling, and other assistance.

### **Rural Law Enforcement**

*\$125 million nationwide*

**Agency:**

U.S. Department of Justice (DOJ), Office of Justice Assistance

<http://www.ojp.usdoj.gov/BJA/recoveryact.html>

**Eligibility:** Competitive Grants to states, local government, Indian Tribes, nonprofits and services providers.

**Description:** The funding is for grants to combat drug-related crime and other law enforcement activities in rural America.

## Section VI - Economic and Community Development

Economic Development Programs; Housing; Flood Protection Programs

### *BY FORMULA*

#### **Education for Homeless Children and Youth**

*\$70 million in formula funding to the states*

<p><b>Agency:</b> U.S. Department of Education <a href="http://www.ed.gov/programs/homeless/index.html">http://www.ed.gov/programs/homeless/index.html</a></p>
<p><b>Eligibility:</b> State Education Agencies</p>
<p><b>Description:</b> Funds to provide services to homeless children including meals and transportation when high unemployment and home foreclosures have created an influx of homeless kids.</p>

#### **Community Development Block Grant (CDBG)**

*\$29 million for Massachusetts to address a wide range of community development needs*

- *\$1.387 million to the 5th District*

<p><b>Agency:</b> U.S. Department of Housing and Urban Development (HUD) <a href="http://www.hud.gov/recovery/">http://www.hud.gov/recovery/</a></p>
<p><b>Administrator:</b> HUD Boston Regional Office <a href="http://www.hud.gov/local/index.cfm?state=ma&amp;topic=offices#boston">http://www.hud.gov/local/index.cfm?state=ma&amp;topic=offices#boston</a> (617) 994-8200</p>
<p><b>Eligibility:</b> Funds are distributed via formula to the state and to entitlement communities.</p>
<p><b>Description:</b> The CDBG program funds a wide range of activities intended to create suitable living environments, provide decent affordable housing and create economic opportunities, primarily for persons of low and moderate income. Under the Recovery Act, recipients shall give priority to projects that can award contracts based on bids within 120 days of the grant agreement. Most of the cities will accelerate the process because HUD has requested feedback in 4 - 6 weeks. Cities have significant discretion in how they spend their funds; some choose to allocate funds to local organizations through a competitive process while others use funds for city programs.</p>
<p>For community-specific allocations see: <a href="http://www.hud.gov/recovery/cdbg.xls">http://www.hud.gov/recovery/cdbg.xls</a></p>

**Tax Credit Assistance Program (TCAP) through the HOME Program**

*\$59.6 million for Massachusetts for grant funding for capital investment in Low Income Housing Tax Credit (LIHTC) projects*

**Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>

**Administrator:**

Massachusetts Department of Housing and Community Development, Low Income Housing Tax Credit Program

[http://www.mass.gov/?pageID=eheadterminal&L=3&L0=Home&L1=Housing+Development&L2=Affordable+Rental+Development&sid=Ehead&b=terminalcontent&f=dhcd\\_hd\\_lihtc\\_lihtc&csid=Ehead](http://www.mass.gov/?pageID=eheadterminal&L=3&L0=Home&L1=Housing+Development&L2=Affordable+Rental+Development&sid=Ehead&b=terminalcontent&f=dhcd_hd_lihtc_lihtc&csid=Ehead)

617.573.1300

**Eligibility:** Funds are distributed via formula to state housing credit allocation agencies, which then distribute these funds competitively and according to their qualified allocation plan. The 52 State Housing Credit Agencies that administer the Low-Income Housing Tax Credit Program are the only eligible applicants.

Tax credits are then distributed to for profit developers and non-profit developers.

**Description:** Projects awarded low income housing tax credits in fiscal years 2007, 2008, or 2009 are eligible for funding but housing credit agencies must give priority to projects that are expected to be completed by February 2012.

For community-specific allocations see:

<http://www.hud.gov/recovery/tcaprecovery.xls>

**Project-Based Rental Assistance (Section 8)**

*\$119 million for Massachusetts to subsidize rents for eligible tenants residing in newly constructed, rehabilitated and existing rental and cooperative apartment projects*

- *\$18.4 million to the 5th District*

**Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>

**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** HUD will use the \$2.0 billion provided in the legislation to fund contract renewals under the Section 8 program. There are 6,300 contracts that will be funded.

**Description:** The rents of some of the residential units are subsidized by HUD under the Section 8 New Construction, Substantial Rehabilitation, and/or Loan Management Set-Aside Programs. (All such assistance is considered "project-based".) HUD will use recovery package money to fund contract renewals under the Section 8 program on a full twelve-month cycle. Project-based Section 8 contracts are managed by contract administrators, including some HUD regional offices, state housing finance agencies,

PHAs, or private entities.

For community-specific allocations see: <http://www.hud.gov/recovery/pbra.xls>

### **Public Housing Capital Fund**

*\$82.3 million for Massachusetts to develop, finance, and modernize public housing*

- *\$6.5 million to the 5th District*

**Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>

**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** Funds are distributed via formula to public housing agencies, which use this funding for energy-efficient modernization and to make large-scale improvements to public housing developments, including critical safety repairs.

**Description:** In addition to the funding allocated through this capital fund, HUD is working to competitively award another \$1 billion to local housing agencies to support investments that leverage private sector financing to retrofit public housing and enhance energy conservation (see below).

For community-specific allocations see: <http://www.hud.gov/recovery/capitalfund.xls>

### **Emergency Shelter Grant/Homelessness Prevention Fund**

*\$44.8 million for Massachusetts for homelessness prevention assistance*

- *\$1.689 million to the 5th District*

**Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>

**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** Funds are distributed via formula to eligible recipients, which are metropolitan cities, urban counties and states (for distribution to local governments and private nonprofit organizations).

**Description:** Including: short-term or medium-term rental assistance, and housing relocation and stabilization services, including such activities as mediation, credit counseling, security or utility deposits, utility payments, moving cost assistance, and case management. At least 60 percent of funds must be spent within two years; all funds must be spent within three years.

For community-specific allocations see:

<http://www.hud.gov/recovery/homelesspreventrecov.xls>

**Lead Hazard Reduction/Healthy Homes**

*\$10.4 million for Massachusetts for the four programs authorized under the Lead Hazard Reduction Program*

- *\$3.874 million to the 5th District*

**Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>

**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** The Lead-Based Paint Hazard Control Grant Program assists states and local governments in identifying and controlling lead-based paint hazards in eligible privately owned rental or owner-occupied housing.

**Description:** The Lead Hazard Reduction Demonstration Grant Program assists urban jurisdictions with the greatest lead-based paint hazard control needs in undertaking programs for the identification and control of lead-based paint hazards in eligible privately owned rental and owner-occupied housing units. The Healthy Homes Demonstration Grant Program develops, demonstrates, and promotes cost-effective, preventive measures to correct multiple residential safety and health hazards that produce serious diseases and injuries in children and other sensitive subgroups such as the elderly, with a particular focus on low income households. The Healthy Homes Technical Studies Grant Program works to gain knowledge to improve the efficacy and cost-effectiveness of methods of evaluation and control of lead-based paint and other housing-related health and safety hazards. Funds are distributed to those applicants that were qualified for award under the program's fiscal year 2008 Notice of Funding Availability but were not funded due to limitations of funds originally available.

For community-specific allocations see:

<http://www.hud.gov/recovery/healthyhomes.xls>

**Weatherization Assistance Program (WAP)**

*\$124.7 million for Massachusetts for low-income home weatherization*

**Agency:**

U.S. Department of Energy (DOE)

<http://apps1.eere.energy.gov/weatherization/>

**Administrator:**

Massachusetts Department of Housing and Community Development

[http://www.mass.gov/?pageID=ehedterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd\\_cd\\_wap\\_wap&csid=Ehed](http://www.mass.gov/?pageID=ehedterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd_cd_wap_wap&csid=Ehed)

HEATLINE at 800.632.8175 for Individuals

**Eligibility:** Funds are distributed via formula to states, which then administer the program.

**Description:** In Massachusetts, the Department of Housing and Community Development sets up local entities where people can apply. The weatherization funding for each individual house has been increased from \$2,000 to \$6,500. Note: This funding is limited to residential buildings. The only other funding listed under the weatherization program is \$100 billion for the Sustainable Energy Resources for Consumers. This is a competitive grant process that allows states to use the funds to further weatherize homes and public buildings with technologies that aren't defined under WAP.

### ***BY COMPETITION***

#### **Transitional Housing Assistance Program**

*\$50 million nationwide*

**Agency:**

U.S. Department of Justice (DOJ), Transitional Housing Assistance Program

[http://www.ovw.usdoj.gov/thousing\\_grant\\_desc.htm](http://www.ovw.usdoj.gov/thousing_grant_desc.htm)

**Eligibility:** Competitive Grants to states, local government, Indian Tribes, nonprofits and services providers.

**Description:** May be used for transitional housing, short-term housing assistance, support services designed to enable individuals who are fleeing domestic violence, violence, sexual assault, or stalking to locate and secure permanent housing and integrate into a community by providing those individuals with services such as transportation, counseling, child care services, case management, employment counseling, and other assistance

#### **Public Housing Capital Fund**

*\$82.3 million for Massachusetts to develop, finance, and modernize public housing*

**Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>

**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** Funds are distributed via formula to public housing agencies, which use this funding for energy-efficient modernization and to make large-scale improvements to public housing developments, including critical safety repairs.

**Description:** \$1 billion nationwide to be administered through a new competitive grant process for priority investments. The new process would provide funding to projects that rehabilitate units to improve energy efficiency, that increase affordable housing projects that are ready-to-go, and address the housing needs of senior citizens and persons with disabilities. Projects that can award contracts within 120 days from the date that funds are available to the recipients would be given priority.

To date, no further details have been released about this program.

**Neighborhood Stabilization Program***\$2 billion nationwide to be awarded competitively***Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** Allows states, local governments, and non-profit entities to be direct recipients of funds.**Description:** This is a substantial deviation from NSP funds appropriated under HERA, which used a formula-based method to allocate funds only to state and local governments.To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.hud.gov/offices/adm/grants/fundsavail.cfm>**Assisted Housing Energy Retrofit Grants / Loans***\$250 million nationwide***Agency:**

U.S. Department of Housing and Urban Development (HUD)

<http://www.hud.gov/recovery/>**Administrator:**

HUD Boston Regional Office

<http://www.hud.gov/local/index.cfm?state=ma&topic=offices#boston>

617.994.8200

**Eligibility:** Allows states, local governments, and non-profit entities to be direct recipients of funds.**Description:** For grants or loans for energy retrofits and green investments to property owners with project based rental assistance.To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.hud.gov/offices/adm/grants/fundsavail.cfm>**Economic Development Administration (EDA)***\$150 million nationwide***Agency:**

U.S. Department of Commerce, Economic Development Administration (EDA)

<http://www.commerce.gov/><http://www.eda.gov/InvestmentsGrants/Investments.xml>**Administrator:**

EDA Philadelphia Regional Office

<http://www.eda.gov/Contacts/Contacts.xml>

215.597.4603

**Eligibility:** Funds are divided regionally via formula; each region actively seeks competitive applications. Based on these locally- and regionally-developed priorities, EDA works in partnership with state and local governments, regional economic development districts, public and private nonprofit organizations, and Indian tribes.

**Description:** EDA administers seven **economic development programs** and awards funds allocated for these programs on a competitive basis. EDA is required to give priority consideration to areas of the nation that have experienced sudden and severe economic dislocation and job loss due to corporate restructuring. The funding is directed to economically-distressed communities to generate new employment, help retain existing jobs and stimulate industrial and commercial growth. EDA assistance is available to rural and urban areas experiencing high unemployment, low income, or other severe economic distress.

Funding opportunities are listed on this website:

<http://www.eda.gov/InvestmentsGrants/Application.xml>

## Broadband

*\$4.7 billion nationwide for a new grant program run by the National Telecommunications and Information Administration, and \$2.5 billion for the existing deployment program run by the Agriculture Department's Rural Utilities Service.*

**Agency:**

U.S. Department of Agriculture (USDA), State Rural Development Office

<http://www.rurdev.usda.gov>

**Administrator:**

USDA, Rural Development State Office

413.253.4300

<http://www.rurdev.usda.gov/ma/SO.htm>

**Eligibility:** Grantees may be states, local governments, nonprofits, corporations, and so forth.

**Description:** USDA's Rural Development, Rural Utilities Service aims to create and modernize rural telecommunications services across the United States. The \$2.5 billion is for Broadband loans, loan guarantees, and grants. At least 75% of the area that will be served by a project receiving these funds must be in a rural area previously lacking sufficient access to high-speed broadband services. Priority will be given to projects that can commence promptly. Internet service providers would be required to provide open access to broadband networks (net neutrality) built using the federal funds. The program also permits grantees to provide broadband education, awareness, training, access, equipment, and support to job-creating strategic facilities located within a State-designated economic zone, Economic Development District designated by the Department of Commerce, Renewal Community or Empowerment Zone designated by the Department of Housing and Urban Development, or Enterprise Community designated by the Department of Agriculture.

The Secretary of Agriculture is required to submit a report on planned spending and

actual obligations no later than 90 days after enactment.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.usda.gov/wps/portal/usdahome>

### **Rural Community Facilities**

*\$130 million nationwide to be awarded competitively*

**Agency:**

U.S. Department of Agriculture (USDA), State Rural Development Office

<http://www.rurdev.usda.gov>

**Administrator:**

USDA, Rural Development State Office

413.253.4300

<http://www.rurdev.usda.gov/ma/SO.htm>

**Eligibility:** Community Programs provides grants to assist in the development of essential community facilities in rural areas and towns of up to 20,000 in population. Grants are authorized on a graduated scale. Applicants located in small communities with low populations and low incomes will receive a higher percentage of grants.

**Description:** Funds to support grants and loans to rural areas for critical community facilities, such as for healthcare, education, fire and rescue, day care, community centers, and libraries.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.rurdev.usda.gov/rhs/cf/cp.htm>

### **Historic Preservation Fund for Historically Black Colleges and Universities**

*\$15 million nationally*

**Agency:**

U.S. Department of the Interior (DOI), National Park Service (NPS)

<http://www.doi.gov/recovery/plans.html#nps>

**Administrator:**

National Park Service, Historic Preservation Grants Office

202.354.2020

**Description:** These funds will be used for historical preservation competitive grants for historically black colleges and universities.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.nps.gov/history/hps/hpg/hbcu/index.htm>

### **Rural Housing Insurance Fund**

*\$200 million nationally*

**Agency:**

U.S. Department of Agriculture (USDA), State Rural Development Office

<http://www.rurdev.usda.gov>

**Administrator:**

Rural Housing Service

<http://www.rurdev.usda.gov/rhs/>

USDA, Rural Development State Office

413.253.4300

<http://www.rurdev.usda.gov/ma/SO.htm>**Eligibility:** Rural areas**Description:** Funds to insure or guarantee rural housing loans for single-family homes, rental and cooperative housing, and rural housing sites.<http://www.rurdev.usda.gov/regs/formstoc.html>**Community Development Financial Institutions***\$100 million nationally***Agency:**

U.S. Department of the Treasury

<http://www.cdfifund.gov/recovery/>**Eligibility:** Community Development Financial Institutions[http://www.cdfifund.gov/what\\_we\\_do/applicants.asp](http://www.cdfifund.gov/what_we_do/applicants.asp)**Description:** These funds will be used to help spur economic development and low-cost financial services to underserved communities.**Micro- Loan Program***\$6 million for this program***Agency:**

U.S. Small Business Administration (SBA)

<http://www.sba.gov/recovery/index.html>**Administrator:**

Boston SBA Office

617.565.5590

**Eligibility:** Applications are submitted to the local intermediary and all credit decisions are made on the local level.<http://www.sba.gov/services/financialassistance/sbaloantopics/microloans/index.html>**Description:** Provides very small loans to start-up, newly established, or growing small business concerns. Under this program, SBA makes funds available to nonprofit community based lenders (intermediaries) which, in turn, make loans to eligible borrowers in amounts up to a maximum of \$35,000. The average loan size is about \$13,000.

***BY DEMAND*****FHA Loan Limits**

*HUD will temporarily increase the loan limits of mortgages insured by the Federal Housing Administration (FHA) up to \$729,750*

**Agency:**

U.S. Department of Housing and Urban Development (HUD), Federal Housing Administration (FHA)

<http://www.hud.gov/recovery/>

**Administrator:**

Federal Housing Administration

<http://www.fha.gov>

**Eligibility:** These increased loan limits are applicable to all FHA-insured mortgage loans endorsed until December 31, 2009.

**Description:** HUD will temporarily increase the loan limits of mortgages insured by the Federal Housing Administration (FHA) up to \$729,750. This will keep credit flowing to millions of families whose options are limited by the current crisis. Previously, FHA's loan limits in very high-cost areas were capped at \$625,500. FHA's reverse mortgage product known as the Home Equity Conversion Mortgage (HECM) will have a new national mortgage limit of \$625,500, up from the previous limit of high of \$417,000.

***BONDS AND TAX CREDIT PROGRAMS*****Build America (Tax Credit) Bond****Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

<http://www.ustreas.gov>

800.829.4933

For more detailed information about this bond, you can view the tax provisions in the American Recovery and Reinvestment Act provided by the U.S. House Ways and Means Committee at <http://waysandmeans.house.gov/media/pdf/110/sbill.pdf>.

**Description:** The American Recovery and Reinvestment Act creates a new "Build America Bond" tax credit to help State and local governments finance certain infrastructure projects. This program is unique because it will provide a tax credit bond in lieu of a tax-exempt bond. Tax credit bonds differ from tax-exempt bonds in two ways: (1) interest paid on tax credit bonds is taxable; and (2) a portion of the interest paid on tax credit bonds takes the form of a Federal tax credit. The Federal tax credit offsets a portion of the cash interest payment that the State or local government would otherwise need to make on the borrowing. The American Recovery and Reinvestment Act provides in 2009 and 2010 for State and local governments the option of issuing a tax credit bond instead of a tax-exempt governmental obligation bond. Because the market for tax credits is currently small given the current economic conditions, this provision will allow State or local governments to elect to receive a direct payment from

the Federal government equal to the subsidy that would have otherwise been delivered through the Federal tax credit for bonds.

To date, no details have been released about this program.

### **Recovery Zone Bonds**

*The Recovery Act authorizes \$10 billion in recovery zone economic development bonds and \$15 billion in recovery zone facility bonds*

#### **Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

<http://www.ustreas.gov>

800.829.4933

For more detailed information about this bond, you can view the tax provisions in the American Recovery and Reinvestment Act provided by the U.S. House Ways and Means Committee at <http://waysandmeans.house.gov/media/pdf/110/sbill.pdf>.

**Description:** The American Recovery and Reinvestment Act creates a new category for tax credit bonds for investment in economic recovery zone. These bonds could be issued during 2009 and 2010.

Each state will receive a share of the national allocation based on that state's job losses in 2008 as percentage of national job losses in 2008. These allocations would be sub-allocated to local municipalities. Municipalities receiving an allocation of these bonds would be permitted to use these bonds to invest in infrastructure, job training, education and economic development in areas within the boundaries of the State, city or county that has significant poverty, unemployment or home foreclosures.

### **New Markets Tax Credits**

*The American Recovery and Reinvestment Act provides an additional \$5 billion for the New Markets Tax Credits program*

#### **Agency:**

Internal Revenue Service (IRS)

<http://www.cdfifund.gov/recovery/>

800.829.4933

**Eligibility:** The New Markets Tax Credit (NMTC) Program permits taxpayers to receive a credit against federal income taxes for making qualified equity investments in designated Community Development Entities (CDEs).

**Description:** Substantially all of the qualified equity investment must in turn be used by the CDE to provide investments in low-income communities. The credit provided to the investor totals 39 percent of the cost of the investment and is claimed over a seven-year credit allowance period. In each of the first three years, the investor receives a credit equal to five percent of the total amount paid for the stock or capital interest at the time of purchase. For the final four years, the value of the credit is six percent annually. Investors may not redeem their investments in CDEs prior to the conclusion of the seven-year period.

## Section VII - Health

Health Programs; Nutrition

### *BY FORMULA*

#### **Medicaid**

*\$86.6 billion was included nationally; \$309 million for Massachusetts for Federal Medicaid Assistance Percentage (FMAP) payments*

<p><b>Agency:</b> U.S. Department of Health and Human Services (DHHS), Centers for Medicare and Medicaid Services (CMS) <a href="http://www.cms.hhs.gov/home/medicaid.asp">http://www.cms.hhs.gov/home/medicaid.asp</a></p>
<p><b>Administrator:</b> MassHealth <a href="http://www.mass.gov/?pageID=eohhs2agencylanding&amp;L=4&amp;L0=Home&amp;L1=Government&amp;L2=Departments+and+Divisions&amp;L3=MassHealth&amp;sid=Eeohhs2">http://www.mass.gov/?pageID=eohhs2agencylanding&amp;L=4&amp;L0=Home&amp;L1=Government&amp;L2=Departments+and+Divisions&amp;L3=MassHealth&amp;sid=Eeohhs2</a> 888.665.9993</p>
<p><b>Eligibility:</b> Funds are distributed via formula to states, which then distribute to eligible participants based on each state's differing criteria.</p>
<p><b>Description:</b> To prevent reductions in Medicaid funded health care to low-income children and families.</p>

#### **National School Lunch Program Equipment Assistance**

*\$1.7 million for Massachusetts*

<p><b>Agency:</b> U.S. Department of Agriculture (USDA) <a href="http://www.fns.usda.gov/cnd/lunch/">http://www.fns.usda.gov/cnd/lunch/</a></p>
<p><b>Administrator:</b> Massachusetts Department of Elementary and Secondary Education <a href="http://www.doe.mass.edu/cnp/nprograms/">http://www.doe.mass.edu/cnp/nprograms/</a> 781.338.6480</p>
<p><b>Eligibility:</b> Distributed via formula to states, which then subgrant to school districts.</p>
<p><b>Description:</b> Federal school meal program that provides nutritionally balanced, low-cost or free lunches to children each school day.</p>

#### **Nutrition Assistance**

*\$362 million for Massachusetts in Supplemental Nutrition Assistance Program benefits (SNAP, formerly Food Stamps)*

<p><b>Agency:</b> U.S. Department of Agriculture (USDA), Food and Nutrition Service <a href="http://www.fns.usda.gov/fsp/snap.htm">http://www.fns.usda.gov/fsp/snap.htm</a></p>
<p><b>Administrator:</b> Massachusetts Office of Health and Human Services</p>

<http://www.mass.gov/?pageID=eohhs2subtopic&L=5&L0=Home&L1=Consumer&L2=Basic+Needs&L3=Food+%26+Nutrition&L4=Food+Stamp+Benefits&sid=Eeohhs2800.249.2007>

Lowell DTA Office: 978.446.2400  
Lawrence DTA Office: 978.725.7100  
FoodSource Hotline: 800.645.8333

**Eligibility:** Funds are distributed via formula to states, which then administer the program.

**Description:** Funds will temporarily increase benefits provided under the Supplemental Nutrition Assistance Program and help cover administrative and management costs.

### Emergency Food Assistance Program (TEFAP)

*\$1.9 million for Massachusetts*

**Agency:**

U.S. Department of Agriculture (USDA), Food and Nutrition Service

<http://www.fns.usda.gov/fdd/programs/tefap/>

**Administrator:**

Massachusetts Office of Health and Human Services

<http://www.mass.gov/?pageID=eohhs2subtopic&L=5&L0=Home&L1=Consumer&L2=Basic+Needs&L3=Food+%26+Nutrition&L4=Food+Stamp+Benefits&sid=Eeohhs2800.249.2007>

800.249.2007

Lowell DTA Office: 978.446.2400  
Lawrence DTA Office: 978.725.7100  
FoodSource Hotline: 800.645.8333

**Eligibility:** Funds are distributed via formula to state distributing agencies, which provide food to 1) local agencies, usually food banks, which in turn, distribute the food to local organizations such as soup kitchens and food pantries that directly serve the public and 2) to community action agencies, which distribute the foods directly to needy households.

**Description:** Funds are to supplement the diets of low-income Americans, including elderly people, by providing them with emergency food and nutrition assistance at no cost. Each state sets criteria for determining what households are eligible to receive food for home consumption.

### Senior Meals Programs

*\$1.1 million for Massachusetts*

**Agency:**

Department of Health and Human Services (DHHS), Administration on Aging (AOA)

<http://www.aoa.gov/>

**Administrator:**

Massachusetts Elder Services

<http://www.mass.gov/?pageID=elderstopic&L=2&L0=Home&L1=Meals+and+Nutr>

**ition&sid=Elders**

800.882.2003

Merrimack Valley Nutrition Project.

978.686.1422

Minuteman Home Care Corporation

781.272.7177

Montachusett Elderly Nutrition Program

800.286.3441

South Middlesex Opportunity Council

508.872.6579

**Eligibility:** Funds are distributed via formula to states, which then administer the program.

**Description:** Funds will help senior meals programs cope with steep increases in food and fuel costs, as many programs are reducing meal deliveries to seniors or closing meal sites. Senior meals programs bring seniors together to eat in group settings and deliver nutritional and dietary safe meals to seniors.

**Supplemental WIC Nutrition Program***\$500 million nationally***Agency:**

U.S. Department of Agriculture (USDA), Food and Nutrition Service

<http://www.fns.usda.gov/fdd/programs/tefap/>**Administrator:**

Massachusetts Office of Health and Human Services

[http://www.mass.gov/?pageID=eohhs2subtopic&L=5&L0=Home&L1=Consumer&L2=Basic+Needs&L3=Food+%26+Nutrition&L4=Food+Stamp+Benefits&sid=Eo  
hhs2](http://www.mass.gov/?pageID=eohhs2subtopic&L=5&L0=Home&L1=Consumer&L2=Basic+Needs&L3=Food+%26+Nutrition&L4=Food+Stamp+Benefits&sid=Eo<br/>hhs2)

800.249.2007

Lowell DTA Office: 978.446.2400

Lawrence DTA Office: 978.725.7100

FoodSource Hotline: 800.645.8333

**Eligibility:** WIC provides Federal grants to States for supplemental foods, health care referrals, and nutrition education for low-income women, infants, and children who are found to be at nutritional risk.

**Description:** To support participation should cost or participation exceed budget estimates.

***BY COMPETITION*****Community Health Center Infrastructure Grants***\$1.5 billion was included for Community Health Centers***Agency:**

U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration

<http://www.hrsa.gov/grants/default.htm>

877.464.4772

**Administrator:**

Bureau of Primary Health Care

<http://bphc.hrsa.gov/about/apply.htm>**Eligibility:** Public and private non-profit health care organizations may apply to receive section 330 funding.**Description:** These funds will support construction, renovation and equipment, including health information technology systems, in health centers and health center controlled networks receiving operating grants under section 330 of the Public Health Service Act.Public and private non-profit health care organizations are encouraged to visit [www.hrsa.gov/grants](http://www.hrsa.gov/grants), where open funding opportunities are listed.**Community Health Center Services Grants***\$500 million was included for Community Health Centers***Agency:**

U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration

<http://www.hrsa.gov/grants/default.htm>

877.464.4772

**Administrator:**

Bureau of Primary Health Care

<http://bphc.hrsa.gov/about/apply.htm>**Eligibility:** Community Health Center**Description:** To increase the number of uninsured Americans who receive quality healthcare.Public and private non-profit health care organizations are encouraged to visit [www.hrsa.gov/grants](http://www.hrsa.gov/grants), where open funding opportunities are listed.**National Health Service Corps***\$300 million was included for the National Health Service Corps***Agency:**

U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration

<http://www.hrsa.gov/grants/default.htm>

877.464.4772

**Administrator:**

National Health Services Corps (NHSC)

<http://nhsc.hrsa.gov/applications>

800.221.9393

**Description:** Funds will be used for training primary healthcare providers including doctors, dentists, and nurses as well as helping pay medical school expenses for students who agree to practice in underserved communities through the National Health Service Corps.

### Health Care Workforce

*\$20 million was included under Title VII and Title VIII of the Public Health Service Act*

**Agency:**

U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration

<http://www.hrsa.gov/grants/default.htm>

877.464.4772

**Administrator:**

Bureau of Health Professions

[www.hrsa.gov/help/healthprofessions.htm](http://www.hrsa.gov/help/healthprofessions.htm)

800.221.9393

**Description:** Funds will be used for all the disciplines trained throughout the primary care medicine and dentistry program, the public health and preventative medicine program, and the scholarship and loan repayment programs for nurses and health professions.

### Biomedical Research

*\$8.7 billion was included for expanding biomedical research funded by the National Institute of Health*

**Agency:**

National Institutes of Health (NIH)

<http://www.nih.gov/>

<http://grants.nih.gov/recovery/>

301.435.0714

**Description:** \$7.4 million will be distributed to specific institutes and centers and to the Common Fund for biomedical research grants. \$800 million will be used by the Director for purposes that can be completed within two years, including short-term grants focused on specific scientific challenges, new research that expands the scope of ongoing projects, research on public and international health priorities and to enhance central research support activities, and centralized information support systems.

To date, no further details have been released about this program. Funding opportunities are listed on this website:

[http://www.nih.gov/about/director/02252009statement\\_arra.htm](http://www.nih.gov/about/director/02252009statement_arra.htm)

**NIH Challenge Grants in Health and Science Research**

*\$200 million over two years for a new initiative called the NIH Challenge Grants in Health and Science Research*

**Agency:**

National Institutes of Health (NIH)

<http://www.nih.gov/>

<http://grants.nih.gov/recovery/>

301.435.0714

**Eligibility:** Select institutions and organizations

**Description:** The NIH Challenge Grants in Health and Science Research will fund 200 or more grants, contingent upon the submission of a sufficient number of scientifically meritorious applications.

Opening Date: March 27, 2009

Application Due Date: April 27, 2009

Application info can be found at:

<http://grants.nih.gov/grants/guide/rfa-files/RFA-OD-09-003.html>

**Core Facility Renovation, Repair, and Improvement**

*\$1 billion available for grants to construct, renovate, or repair existing non-Federal research facilities*

**Agency:**

National Institutes of Health (NIH)

<http://www.nih.gov/>

<http://grants.nih.gov/recovery/>

301.435.0714

National Center for Research Resources (NCRR)

[http://www.ncrr.nih.gov/the\\_american\\_recovery\\_and\\_reinvestment\\_act/](http://www.ncrr.nih.gov/the_american_recovery_and_reinvestment_act/)

**Eligibility:** Select institutions and organizations

**Description:** The major objective of these funds is to upgrade core facilities to support the conduct of PHS supported biomedical and/or behavioral research. Support can be requested to alter and renovate (A&R) the core facility as well as to improve the general equipment in the core facility or to purchase general equipment for specialized groups of researchers. Specialized equipment over \$100,000 in cost cannot be requested as part of this FOA. In situations when similar core facilities exist in different departments at an institution, funding can be requested in support of centralizing these core facilities. It is expected that all awards will be expended expeditiously and that applicants will consider the use of “green” technologies and design approaches. Awards are expected to create and/or maintain American jobs.

Application Due Dates: September 17, 2009

Application info can be found at:

<http://grants.nih.gov/grants/guide/rfa-files/RFA-RR-09-007.html>

**Extramural Research Facilities Improvement Program**

*\$1 billion to the National Center for Research Resources (NCRR) to support extramural construction, repairs, and alterations in support of all NIH funded research institutions*

**Agency:**

National Institutes of Health (NIH)

<http://www.nih.gov/>

<http://grants.nih.gov/recovery/>

301.435.0714

National Center for Research Resources (NCRR)

[http://www.ncrr.nih.gov/the\\_american\\_recovery\\_and\\_reinvestment\\_act/](http://www.ncrr.nih.gov/the_american_recovery_and_reinvestment_act/)

**Eligibility:** Select institutions and organizations

**Description:** National Institutes of Health, solicits applications from institutions that propose to expand, remodel, renovate, or alter biomedical or behavioral research facilities. The major objective of this FOA is to facilitate and enhance the conduct of Public Health Service-supported biomedical and behavioral research by supporting the costs of improving non-Federal basic research, clinical research, and animal facilities to meet the biomedical or behavioral research, research training, or research support needs of an institution. Since the funds for this FOA come from the American Recovery and Reinvestment Act of 2009 (the Recovery Act), Pub. L. No. 111-5, it is expected that all awards will be expended expeditiously and that applicants will consider green/sustainable technologies and design approaches. Awards are expected to create and/or maintain American jobs.

Application Due Date(s):

May 6, 2009 (projects between \$2M and \$5M)

June 17, 2009 (projects between \$10M and \$15M)

July 17, 2009 (projects between \$5M and \$10M)

Application info can be found at:

<http://grants.nih.gov/grants/guide/rfa-files/RFA-RR-09-008.html>

**High-End Instrumentation Grant Program**

*\$300 million for shared instrumentation and other capital equipment to support all NIH activities*

**Agency:**

National Institutes of Health (NIH)

<http://www.nih.gov/>

<http://grants.nih.gov/recovery/>

301.435.0714

National Center for Research Resources (NCRR)

[http://www.ncrr.nih.gov/the\\_american\\_recovery\\_and\\_reinvestment\\_act/](http://www.ncrr.nih.gov/the_american_recovery_and_reinvestment_act/)

**Eligibility:** Select institutions and organizations

**Description:** The NCRR High-End Instrumentation Grant (HEI) program encourages applications from groups of NIH-supported investigators to purchase a single major item of equipment to be used for biomedical research that costs at least \$600,000. The maximum award is \$8,000,000. Additionally, it is expected that the funds will be

expended expeditiously, within 18-24 months from the date of award. Instruments in this category include, but are not limited to, structural and functional imaging systems, macromolecular NMR spectrometers, high-resolution mass spectrometers, cryoelectron microscopes and supercomputers.

Application Due Date(s): May 6, 2009

Application info can be found at:

<http://grants.nih.gov/grants/guide/pa-files/PA-09-118.html>

### **Comparative Effectiveness Health Research**

*\$1.1 billion was included for Health and Human Services, the Agency for Healthcare Research and Quality (AHRQ) and NIH*

#### **Agency:**

U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration

<http://www.hrsa.gov/grants/default.htm>

877.464.4772

<http://grants.nih.gov/recovery/>

301.435.0714

Agency for Healthcare Research and Quality (AHRQ)

<http://www.ahrq.gov/>

**Eligibility:** Select institutions and organizations

**Description:** Funding will be used to provide patients, clinicians, and others evidence-based information to make informed decisions about health care. ARRA contains \$1.1 billion for comparative effectiveness research. Of the total, \$300 million is for AHRQ to build on its existing collaborative and transparent Effective Health Care program. This program allows for input from all perspectives into the development of the research and implementation of the findings.

Of the remaining funds, \$400 million each will go to NIH and the Office of HHS Secretary. The legislation calls on the Institute of Medicine to recommend research priorities for these funds and gather stakeholder input. A report is due June 30, 2009. In addition, the Federal Coordinating Council for Comparative Effectiveness Research will be created to offer guidance and coordination on the use of these funds.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://effectivehealthcare.ahrq.gov/>

### **Prevention and Wellness Program**

*\$650 million was included for the Center for Disease Control for evidence based clinical and community prevention and wellness programs*

#### **Agency:**

U.S. Department of Health and Human Services (DHHS), Health Resources and Services Administration

<http://www.hrsa.gov/grants/default.htm>

877.464.4772

**Administrator:**

Centers for Disease Control (CDC)

<http://www.cdc.gov/partners/Archive/EconomicStimulus/>

800.232.4636

**Description:** Funds to support state and local efforts to fight preventable chronic diseases and infectious diseases. Specifically, \$1 billion was made available to the Department of Health and Human Services (HHS) for a prevention and wellness fund: \*\*\*\$50 million for Healthcare-Associated Infections; \*\*\*\$650 million for community-based prevention and wellness programs; and \*\*\*CDC directly stands to receive \$300 million by expanding the Section 317 immunization program to help ensure more under-insured children and adults receive recommended vaccines. Immunization has been shown to be cost saving—routine childhood vaccination has resulted in an annual cost savings of nearly \$10 billion.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.cdc.gov/partners/Archive/EconomicStimulus/>

### Health Information Technology Grants

*\$2 billion was included for discretionary grants to promote the adoption and use of interoperable health information technology (HIT)*

**Agency:**

U.S. Department of Health and Human Services (DHHS) - Office of the National Coordinator for Health Information Technology

<http://www.hhs.gov/healthit/>

202.690.7151

**Description:** To promote the use and exchange of electronic health information.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.hhs.gov/recovery/programs/index.html>

### Health Information Technology Improvements

*\$17 Billion was included to improve investments and incentives through Medicare and Medicaid to ensure widespread adoption and use of interoperable health information technology (HIT)*

**Agency:**

U.S. Department of Health and Human Services (DHHS) - Office of the National Coordinator for Health Information Technology

<http://www.hhs.gov/healthit/>

202.690.7151

**Eligibility:** Hospitals and Physician offices will automatically receive benefit through CMS reimbursements. Grants will be available through HHS for other medical agencies.

**Description:** To promote the use and exchange of electronic health information.

To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.hhs.gov/recovery/programs/index.html>

***BY DEMAND***

**COBRA**

**Agency:**

U.S. Department of Labor (DOL)

<http://www.dol.gov/ebsa/cobra.html>

**Administrator:**

COBRA Benefits Advisor

866.444.3272

**Eligibility:** To qualify for premium assistance, a worker must have been involuntarily terminated between Sept. 1, 2008 and Dec. 31, 2009.

**Description:** The measure provides for a 65% federal subsidy for health insurance premiums under COBRA for up to nine months for workers (and their families) who have been involuntarily terminated.

## Section VIII - Small Business

### Small Business Assistance

#### Small Business Loans / Tax Credits

Small Businesses are the engine that drives our economy. The American Recovery and Reinvestment Act provides \$730 million to the Small Business Administration (SBA) and makes changes to the agency's lending and investment programs so that they can reach more small businesses that need help. Below is a summary of some of the changes.

To date, the Small Business Administration (SBA) has not provided details about how fast the changes made in the American Recovery and Reinvestment Act will be implemented. For more information in the coming days, I encourage you to visit the following resources:

- Ways and Means summary: <http://waysandmeans.house.gov/media/pdf/111/arra.pdf>
- Small Business Administration's Financial Assistance information:  
<http://www.sba.gov/services/financialassistance/index.html>
- <http://www.sba.gov/recovery/>
- Small Business Administration Boston District Office  
617.565.5590  
<http://www.sba.gov/localresources/district/ma/index.html>

I also encourage you to consult with the Small Business Development Center (SBDC) in your community. The SBDC program is a cooperative effort of the private sector, the educational community, and federal, state, and local governments. The SBDC's provide free or low-cost business seminars to help you raise capital, start or grow your business in Massachusetts.

Massachusetts Small Business Development Center Northeast Regional Office  
[www.salemstate.edu/sbdc/](http://www.salemstate.edu/sbdc/)

Massachusetts Small Business Development Center Worcester Office  
<http://www.clarku.edu/Offices/sbdc/>

#### **90 Percent Guarantee**

The bill allows SBA to raise its loan guarantee from the current levels to as much as 90 percent for some loans. At present, SBA can guarantee loans up to 85 percent on loans up to \$150,000, and up to 75 percent on loans greater than \$150,000. The 50 percent guarantee on SBA Express loans would remain unchanged. Increasing the SBA guarantee percentage will encourage lenders to extend more capital to small businesses by increasing the share covered by an SBA guarantee.

#### **Business Stabilization Loans**

The bill creates a new SBA loan program to provide deferred-payment loans of up to \$35,000 to viable small businesses that need the money to make payments on an existing, qualifying loan for up to six months. These loans will be 100 percent guaranteed by SBA. Repayment would not have to begin until 12 months after the loan is fully disbursed. The bill provides \$255 million for this new program. These loans will help ensure that small businesses have time to re-focus their business

plans in order to succeed in the long run.

**Microloans**

The bill expands SBA's Microloan program, which provides small loans (up to \$35,000) paired with technical assistance to start-up, newly established or growing small businesses. The bill provides funding to increase loans from SBA to participating Microlenders by \$50 million through September 30, 2010, and adds \$24 million in grants to provide technical assistance to borrowers. Historically, these loans reach low-income individuals, women and minorities in both rural and urban areas. Expanding this program through the stimulus bill will help ensure these entrepreneurs are not left behind in the credit crunch.

**Refinancing**

The bill also gives SBA the power to use the 504 Certified Development Company program to refinance existing loans for fixed assets, providing fresh support for small business expansion. This change will help business owners expand their current development projects and create jobs in their communities.

**Secondary Market Expansion**

The bill authorizes SBA to establish a secondary market for pools of "first lien" loans under the 504 program. These "first lien" loans from commercial lenders currently have no SBA guarantee. The bill authorizes SBA to deploy federal guarantees for pools of these first lien loans, so that they can be sold to investors in a secondary market. Providing liquidity for these first mortgages will help encourage lenders to continue participating in SBA's 504 loan program, which provides a key source of capital for community development and other projects.

The bill also empowers SBA to set up a Secondary Market Lending Authority that would make direct loans to broker-dealers that participate in the secondary market for SBA-guaranteed 7(a) loans. These broker-dealers would use the funds to purchase SBA-backed loans from commercial lenders, assemble them into pools and sell them to investors in the secondary loan market. This program may help address some of the issues facing the secondary market for SBA loans and may ultimately help SBA lenders make new loans to borrowers.

**Investment Program**

The bill helps SBA-licensed Small Business Investment Companies (SBICs) and families of SBIC funds better leverage the capital they use to invest in small businesses. The bill sets maximum levels of funding the agency can provide to these companies at up to three times the private capital raised by those companies, or \$150 million, whichever is less. It also raises the percentage any one SBIC can invest in a single small business to 10 percent of total capital, and raises from 20 percent to 25 percent the percentage of any licensee's dollar investments that must be made in "smaller" businesses.

**Surety Bonds**

The bill also raises the maximum contract amount that can be covered by an SBA guaranteed surety bond from \$2 million to \$5 million, and, under certain circumstances, for contracts amounting to \$10 million, and provides additional funds to cover the costs of expanding this program. Small businesses need surety bonds in order to bid on and obtain many federal and other contracts. SBA guarantees surety bonds to small businesses that private surety companies would not otherwise be able to extend.

**7(a) Loan Guarantee Program***\$375 million nationwide***Agency:**

Small Business Administration (SBA)

<http://www.sba.gov/services/financialassistance/sbaloantopics/7a/>**Administrator:**

Small Business Administration Boston District Office

617.565.5590

<http://www.sba.gov/localresources/district/ma/index.html>

**Eligibility:** All applicants must be eligible to be considered for a 7(a) loan. The eligibility requirements are designed to be as broad as possible in order that this lending program can accommodate the most diverse variety of small business financing needs. All businesses that are considered for financing under SBA's 7(a) loan program must: meet SBA size standards, be for-profit, not already have the internal resources (business or personal) to provide the financing, and be able to demonstrate repayment. Certain variations of SBA's 7(a) loan program may also require additional eligibility criteria. Special purpose programs will identify those additional criteria.

Eligibility factors for all 7(a) loans include: size, type of business, use of proceeds, and the availability of funds from other sources. The following links will provide more detailed information on these eligibility issues.

**Description:** Temporary fee elimination - SBA is directed to collect no fee or reduce fees to the maximum extent possible for the 7(a) loan program. SBA may guarantee up to 90% of 7(a) loans. These funds are to ensure small businesses maintain have access to 7(a) loans that may be used to establish a new business or to assist in the operation, acquisition or expansion of an existing business.

**504 Loan Program***\$375 million nationwide***Agency:**

Small Business Administration (SBA)

<http://www.sba.gov/services/financialassistance/sbaloantopics/cdc504/index.html>**Administrator:**

Small Business Administration Boston District Office

617.565.5590

<http://www.sba.gov/localresources/district/ma/index.html>

**Eligibility:** To be eligible, the business must be operated for profit and fall within the size standards set by the SBA. Under the 504 Program, the business qualifies as small if it does not have a tangible net worth in excess of \$7.5 million and does not have an average net income in excess of \$2.5 million after taxes for the preceding two years. Loans cannot be made to businesses engaged in speculation or investment in rental real estate.

**Description:** Funds to ensure small businesses maintain adequate access to 504 loans. 504 loans may be used for purchasing land and improvements, including existing buildings, grading, street improvements, utilities, parking lots and landscaping;

construction of new facilities, or modernizing, renovating or converting existing facilities; or purchasing long-term machinery and equipment.

### **Business Stabilization Program**

*\$225 million nationwide*

**Agency:**

Small Business Administration (SBA)

[www.sba.gov](http://www.sba.gov)

**Administrator:**

Small Business Administration Boston District Office

617.565.5590

<http://www.sba.gov/localresources/district/ma/index.html>

**Eligibility:** To date, no further details have been released about this program. Funding opportunities are listed on this website: <http://www.sba.gov/recovery/>

**Description:** To provide loans on a deferred basis to viable small business concerns that have a qualifying small business loan and are experiencing immediate financial hardship.

### **Micro-Loan Program**

*\$6 million nationwide*

**Agency:**

Small Business Administration (SBA)

<http://www.sba.gov/services/financialassistance/sbaloantopics/microloans/index.html>

**Administrator:**

Small Business Administration Boston District Office

617.565.5590

<http://www.sba.gov/localresources/district/ma/index.html>

**Eligibility:** Small businesses that are interested in applying for a microloan should contact a microlender in their area.

Western Massachusetts Enterprise Fund (Microlender)

413-774-4033

[www.wmef.org](http://www.wmef.org)

**Description:** Provides very small loans to start-up, newly established, or growing small business concerns. Under this program, SBA makes funds available to nonprofit community based lenders (intermediaries) which, in turn, make loans to eligible borrowers in amounts up to a maximum of \$35,000. The average loan size is about \$13,000. Applications are submitted to the local intermediary and all credit decisions are made on the local level.

## ***TAX CREDIT PROGRAMS***

The following tax information can be found on the Committee on Ways and Means website at:  
<http://waysandmeans.house.gov/media/pdf/111/arra.pdf>

Internal Revenue Service (IRS)

<http://www.irs.gov/newsroom/article/0,,id=204335,00.html?portlet=6>  
800.829.4933

Additional Help with Tax information:

National Taxpayer Advocate

<http://www.irs.gov/advocate/article/0,,id=97402,00.html>  
877.777.4778

**Extension of Bonus Depreciation.** Businesses are allowed to recover the cost of capital expenditures over time according to a depreciation schedule. Last year, Congress temporarily allowed businesses to recover the costs of capital expenditures made in 2008 faster than the ordinary depreciation schedule would allow by permitting these businesses to immediately writeoff fifty percent of the cost of depreciable property (e.g., equipment, tractors, wind turbines, solar panels, and computers) acquired in 2008 for use in the United States. The bill would extend this temporary benefit for capital expenditures incurred in 2009. *This proposal is estimated to cost \$5.074 billion over 10 years.*

**Election to Accelerate Recognition of Historic AMT/R&D Credits.** Last year, Congress temporarily allowed businesses to accelerate the recognition of a portion of their historic AMT or research and development (R&D) credits in lieu of bonus depreciation. The amount that taxpayers may accelerate is calculated based on the amount that each taxpayer invests in property that would otherwise qualify for bonus depreciation. This amount is capped at the lesser of six percent (6%) of historic AMT and R&D credits or \$30 million. The bill would extend this temporary benefit through 2009. *This proposal is estimated to cost \$805 million over 10 years.*

**Extension of Enhanced Small Business Expensing.** In order to help small businesses quickly recover the cost of certain capital expenses, small business taxpayers may elect to write-off the cost of these expenses in the year of acquisition in lieu of recovering these costs over time through depreciation. Until the end of 2010, small business taxpayers are allowed to write-off up to \$125,000 (indexed for inflation) of capital expenditures subject to a phase-out once capital expenditures exceed \$500,000 (indexed for inflation). Last year, Congress temporarily increased the amount that small businesses could write-off for capital expenditures incurred in 2008 to \$250,000 and increased the phase-out threshold for 2008 to \$800,000. The bill would extend these temporary increases for capital expenditures incurred in 2009. *This proposal is estimated to cost \$41 million over 10 years.*

**5-Year Carryback of Net Operating Losses for Small Businesses.** Under current law, net operating losses (“NOLs”) may be carried back to the two taxable years before the year that the loss arises (the “NOL carryback period”) and carried forward to each of the succeeding twenty taxable years after the year that the loss arises. For 2008, the bill would extend the maximum NOL carryback period from two years to five years for small businesses with gross receipts of \$15 million or less. *This proposal is estimated to cost \$947 million over 10 years.*

**Delayed Recognition of Certain Cancellation of Debt Income.** Under current law, a taxpayer generally has income where the taxpayer cancels or repurchases its debt for an amount less than its adjusted issue price. The amount of cancellation of debt income (“CODI”) is the excess of the old debt’s adjusted issue price over the repurchase price. Certain businesses will be allowed to recognize CODI over 10 years (defer tax on CODI for the first four or five years and recognize this income ratably over the following five taxable years) for specified types of business debt repurchased by the business after December 31, 2008 and before January 1, 2011. *This proposal is estimated to cost \$1.622 billion over 10 years.*

**Incentives to Hire Unemployed Veterans and Disconnected Youth.** Under current law, businesses are allowed to claim a work opportunity tax credit equal to 40 percent of the first \$6,000 of wages paid to employees of one of nine targeted groups. The bill would create two new targeted groups of prospective employees: (1) unemployed veterans; and (2) disconnected youth. An individual would qualify as an unemployed veteran if they were discharged or released from active duty from the Armed Forces during the five-year period prior to hiring and received unemployment compensation for more than four weeks during the year before being hired. An individual qualifies as a disconnected youth if they are between the ages of 16 and 25 and have not been regularly employed or attended school in the past 6 months. *This proposal is estimated to cost \$231 million over 10 years.*

**Small Business Capital Gains.** Under current law, Section 1202 provides a fifty percent (50%) exclusion for the gain from the sale of certain small business stock held for more than five years. The amount of gain eligible for the exclusion is limited to the greater of 10 times the taxpayer’s basis in the stock, or \$10 million gain from stock in that small business corporation. This provision is limited to individual investments and not the investments of a corporation. The nonexcluded portion of section 1202 gain is taxed at the lesser of ordinary income rates or 28 percent, instead of the lower capital gains rates for individuals. The provision allows seventy-five percent (75%) exclusion for individuals on the gain from the sale of certain small business stock held for more than five years. This change is for stock issued after the date of enactment and before January 1, 2011. *This provision is estimated to cost \$829 million over 10 years.*

**Temporary Small Business Estimated Tax Payment Relief.** The bill reduces the 2009 required estimated tax payments for certain small businesses. *This provision has been estimated to have no revenue effect over 10 years.*

**Temporary Reduction of S Corporation Built-In Gains Holding Period from 10 Years to 7 Years.** Under current law, if a taxable corporation converts into an S corporation, the conversion is not a taxable event. However, following such a conversion, an S corporation must hold its assets for ten years in order to avoid a tax on any built-in gains that existed at the time of the conversion. The bill would temporarily reduce this holding period from ten years to seven years for sales occurring in 2009 and 2010. *This proposal is estimated to cost \$415 million over 10 years.*

**Repeal of Treasury Section 382 Notice.** Last year, the Treasury Department issued Notice 2008-83, which liberalized rules in the tax code that are intended to prevent taxpayers that acquire companies from claiming losses that were incurred by the acquired company prior to the taxpayer's ownership of the company. The bill would repeal this Notice prospectively. *This proposal is estimated to raise \$6.977 billion over 10 years.*

**Treatment of Certain Ownership Changes.** The bill would clarify the application of section 382 to certain companies restructuring pursuant to the Emergency Economic Stabilization Act of 2008. *This proposal is estimated to cost \$3.163 billion over 10 years.*

### Work Opportunity Tax Credit (WOTC)

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

[www.irs.gov](http://www.irs.gov)

800.829.4933

WOTC is described at <http://www.doleta.gov/business/incentives/opptax/>

**Description:** A new targeted group is created for WOTC, which provides a tax credit to employers who hire members of targeted groups. The new group is unemployed veterans and disconnected youth who begin work in 2009 and 2010. The credit applies to individuals who begin work for the employer after December 31, 2008.

## Section IX - Individuals

Automatic Disbursement; Consumer Tax Credits

### *BY AUTOMATIC DISBURSEMENT*

#### One-Time Economic Recovery Payment

**Agency:**

U.S. Social Security Administration (SSA)

<http://www.socialsecurity.gov/payment/>

800.772.1213

**Eligibility:** One-time increase of \$250 per person to Social Security beneficiaries, SSI recipients, and disabled veterans.

**Description:** The American Recovery and Reinvestment Act provides for a one-time payment of \$250 to individuals who receive Social Security benefits, Railroad Retirement benefits, veteran's compensation or pension benefits and Supplemental Security Income (SSI), excluding individuals who receive SSI while in a Medicaid institution. Furthermore, individuals must have been participating in one of these programs three months prior to 02/17/2009 to qualify. The one-time payments will not come from Internal Revenue Service (IRS) as they have in previous legislation. The Social Security Administration expects everyone who is entitled to a payment to receive it by late May 2009. No action is required by the individual at this time.

- Up to \$400 for workers (or \$800 for married couples) in the new Making Work Pay Tax Credit for 2.5 million workers and their families in Massachusetts—this can be taken as a continuous extra allotment in paycheck (the default) or as a one-time refund.
- \$2,500 for 71,000 additional families in Massachusetts that will qualify for the new American Opportunity Tax Credit that makes college more affordable for 3.8 million families nationwide.
- Extended and increased Homebuyer Tax Credit to both help first-time homeowners and stabilize plummeting home prices: the previous \$7,500 credit was raised to \$8,000, extended to homes purchased through December 1, and no longer must be paid back.
- Extended Bonus Depreciation and Small Business Expensing through 2009, allowing businesses that make capital investments to immediately deduct one-half the cost. Small businesses can immediately deduct 100% of the cost of these investments.
- The American Recovery and Reinvestment Act of 2009 would protect over 26 million working families across the nation from the Alternative Minimum Tax, representing thousands of dollars in additional income taxes. According to CRS, 915,000 people in Massachusetts are now protected from the AMT in 2009.

## ***TAX CREDIT PROGRAMS***

The following tax information can be found on the Committee on Ways and Means website at:  
<http://waysandmeans.house.gov/media/pdf/111/arra.pdf>

Internal Revenue Service (IRS)

<http://www.irs.gov/newsroom/article/0,,id=204335,00.html?portlet=6>  
800.829.1040

Additional Help with Tax information:

National Taxpayer Advocate

<http://www.irs.gov/advocate/article/0,,id=97402,00.html>  
877.777.4778

**“Making Work Pay” Tax Credit.** The bill would cut taxes for more than 95% of working families in the United States. For 2009 and 2010, the bill would provide a refundable tax credit of up to \$400 for working individuals and \$800 for working families. This tax credit would be calculated at a rate of 6.2% of earned income, and would phase out for taxpayers with adjusted gross income in excess of \$75,000 (\$150,000 for married couples filing jointly). Taxpayers can receive this benefit through a reduction in the amount of income tax that is withheld from their paychecks, or through claiming the credit on their tax returns. *This proposal is estimated to cost \$116.199 billion over 10 years.*

**Economic Recovery Payment to Recipients of Social Security, SSI, Railroad Retirement and Veterans Disability Compensation Benefits.** The bill would provide a one-time payment of \$250 to retirees, disabled individuals and SSI recipients receiving benefits from the Social Security Administration, Railroad Retirement beneficiaries, and disabled veterans receiving benefits from the U.S. Department of Veterans Affairs. The one-time payment is a reduction to any allowable Making Work Pay credit. *This proposal is estimated to cost \$14.225 billion over 10 years.*

**Refundable Credit for Certain Federal and State Pensioners.** The bill would provide a onetime refundable tax credit of \$250 in 2009 to certain government retirees who are not eligible for Social Security benefits. This one-time credit is a reduction to any allowable Making Work Pay credit. *This proposal is estimated to cost \$218 million over 10 years.*

**Increase in Earned Income Tax Credit.** The bill would temporarily increase the earned income tax credit for working families with three or more children. Under current law, working families with two or more children currently qualify for an earned income tax credit equal to forty percent (40%) of the family’s first \$12,570 of earned income. This credit is subject to a phase-out for working families with adjusted gross income in excess of \$16,420 (\$19,540 for married couples filing jointly). The bill would increase the earned income tax credit to forty-five percent (45%) of the family’s first \$12,570 of earned income for families with three or more

children and would increase the beginning point of the phase-out range for all married couples filing a joint return (regardless of the number of children) by \$1,880. *This proposal is estimated to cost \$4.663 billion over 10 years.*

**Increase Eligibility for the Refundable Portion of Child Credit.** The bill would increase the eligibility for the refundable child tax credit in 2009 and 2010. For 2008, the child tax credit is refundable to the extent of 15 percent of the taxpayer's earned income in excess of \$8,500. The bill would reduce this floor for 2009 and 2010 to \$3,000. *This proposal is estimated to cost \$14.830 billion over 10 years.*

**“American Opportunity” Education Tax Credit.** The bill would provide financial assistance for individuals seeking a college education. For 2009 and 2010, the bill would provide taxpayers with a new “American Opportunity” tax credit of up to \$2,500 of the cost of tuition and related expenses paid during the taxable year. Under this new tax credit, taxpayers will receive a tax credit based on one hundred percent (100%) of the first \$2,000 of tuition and related expenses (including books) paid during the taxable year and twenty-five percent (25%) of the next \$2,000 of tuition and related expenses paid during the taxable year. Forty percent (40%) of the credit would be refundable. This tax credit will be subject to a phase-out for taxpayers with adjusted gross income in excess of \$80,000 (\$160,000 for married couples filing jointly). *This proposal is estimated to cost \$13.907 billion over 10 years.*

**Computers as Qualified Education Expenses in 529 Education Plans.** Section 529 Education Plans are tax-advantaged savings plans that cover all qualified education expenses, including: tuition, room & board, mandatory fees and books. The bill provides that computers and computer technology qualify as qualified education expenses. *This proposal is estimated to cost \$6 million over 10 years.*

**Refundable First-time Home Buyer Credit.** Last year, Congress provided taxpayers with a refundable tax credit that was equivalent to an interest-free loan equal to 10 percent of the purchase of a home (up to \$7,500) by first-time home buyers. The provision applies to homes purchased on or after April 9, 2008 and before July 1, 2009. Taxpayers receiving this tax credit are currently required to repay any amount received under this provision back to the government over 15 years in equal installments, or, if earlier, when the home is sold. The credit phases out for taxpayers with adjusted gross income in excess of \$75,000 (\$150,000 in the case of a joint return). The bill eliminates the repayment obligation for taxpayers that purchase homes after January 1, 2009, increases the maximum value of the credit to \$8,000, and removes the prohibition on financing by mortgage revenue bonds, and extends the availability of the credit for homes purchased before December 1, 2009. The provision would retain the credit recapture if the house is sold within three years of purchase. *This proposal is estimated to cost \$6.638 billion over 10 years.*

**Sales Tax Deduction for Vehicle Purchases.** The bill provides all taxpayers with a deduction for State and local sales and excise taxes paid on the purchase of new cars, light truck, recreational vehicles, and motorcycles through 2009. This deduction is subject to a phase-out for taxpayers with adjusted gross income in excess of

\$125,000 (\$250,000 in the case of a joint return). *This proposal is estimated to cost \$1.684 billion over 10 years.*

**Temporary Suspension of Taxation of Unemployment Benefits.** Under current law, all federal unemployment benefits are subject to taxation. The average unemployment benefit is approximately \$300 per week. The proposal temporarily suspends federal income tax on the first \$2,400 of unemployment benefits per recipient. Any unemployment benefits over \$2,400 will be subject to federal income tax. This proposal is in effect for taxable year 2009. *This proposal is estimated to cost \$4.740 billion over 10 years.*

**Extension of AMT Relief for 2009.** The bill would provide more than 26 million families with tax relief in 2009 by extending AMT relief for nonrefundable personal credits and increasing the AMT exemption amount to \$70,950 for joint filers and \$46,700 for individuals. *This proposal is estimated to cost \$69.759 billion over 10 years.*

### New Markets Tax Credits

**Agency:**

Internal Revenue Service (IRS)

<http://www.cdfifund.gov/recovery/>

**Eligibility:** The New Markets Tax Credit (NMTC) Program permits taxpayers to receive a credit against federal income taxes for making qualified equity investments in designated Community Development Entities (CDEs).

**Description:** The New Markets Tax Credit (NMTC) Program permits taxpayers to receive a credit against federal income taxes for making qualified equity investments in designated Community Development Entities (CDEs). Substantially all of the qualified equity investment must in turn be used by the CDE to provide investments in low-income communities. The credit provided to the investor totals 39 percent of the cost of the investment and is claimed over a seven-year credit allowance period. In each of the first three years, the investor receives a credit equal to five percent of the total amount paid for the stock or capital interest at the time of purchase. For the final four years, the value of the credit is six percent annually. Investors may not redeem their investments in CDEs prior to the conclusion of the seven-year period.

### *OTHER RESOURCES*

#### **Weatherization Assistance Program (WAP)**

*\$124.7 million for Massachusetts for low-income home weatherization.*

**Administrator:**

Massachusetts Department of Housing and Community Development

[http://www.mass.gov/?pageID=ehedterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd\\_cd\\_wap\\_wap&csid=Ehed](http://www.mass.gov/?pageID=ehedterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd_cd_wap_wap&csid=Ehed)

HEATLINE at 800.632.8175 for Individuals

Greater Lawrence Area: Greater Lawrence Community Action Council, Inc. (GLCAC)  
978.681.4900

Greater Lowell: Community Teamwork, Inc. (CTI)  
978.459.6161

Haverhill Area: Community Action, Inc. (CAI)  
978.373.1971

Southern District: South Middlesex Opportunity Council, Inc. (SMOC)  
800.286.6776

**Eligibility:** Households that are eligible for the Low Income Home Energy Assistance Program (LIHEAP or Fuel Assistance) are eligible for weatherization services. Eligibility is based on household income no more than 200% of the Federal Poverty Level. See the “Income Guidelines” link for additional information. Priority of service is given to those households with elderly, disabled, children (6 and under), LIHEAP high-energy users, and Native Americans. Homeowners and tenants with their landlord permission are eligible.

**Description:** In Massachusetts, the Department of Housing and Community Development sets up local entities where people can apply. The weatherization funding for each individual house has been increased from \$2,000 to \$6,500. Note: This funding is limited to residential buildings.

## Energy Efficiency Programs

**Administrator:**  
Mass Save, Home Energy Solutions  
<http://www.masssave.com/>

**Description:** Designed to save you money, improve the energy performance of your home, and reduce air pollution, MassSAVE is brought to you by your local electric and gas utilities and energy efficiency service providers. MassSAVE provides year-round home energy solutions.

**MassSAVE Program Benefits:** Reduced energy costs; Improved home performance; Healthier environment; and Improved comfort all year long.

## Energy Star Program

**Administrator:**  
Energy Star  
[http://www.energystar.gov/index.cfm?c=products.pr\\_tax\\_credits](http://www.energystar.gov/index.cfm?c=products.pr_tax_credits)

**Description:** The American Recovery and Reinvestment Act of 2009 made some significant changes to the energy efficiency tax credits. The highlights are:

The tax credits that were previously effective for 2009, have been extended to 2010 as well.

The tax credit has been raised from 10% to 30%.

The tax credits that were for a specific dollar amount (ex \$300 for a CAC), have been converted to 30% of the cost.

The maximum credit has been raised from \$500 to \$1500 for the two years (2009-2010). However, some improvements such as geothermal heat pumps, solar water heaters, and solar panels are not subject to the \$1,500 maximum.

The \$200 cap on windows has been removed, but the requirements for windows has been increased significantly. Not all ENERGY STAR qualified windows will qualify.

### Alternative Fuel Vehicle Refueling Property

**Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

The following website provides guidance on how the tax credit was administered in 2007, [http://www.irs.gov/irb/2007-22\\_IRB/ar10.html](http://www.irs.gov/irb/2007-22_IRB/ar10.html).

**Eligibility:** The alternative refueling property credit provides a tax credit to businesses (example: gas stations) and individuals that install alternative fuel pumps, such as fuel pumps that dispense E-85 fuel, electricity, hydrogen, and natural gas.

**Description:** The American Recovery and Reinvestment Act increases the current 30% alternative refueling property credit for businesses (capped at \$30,000) to 50% (capped at \$50,000). Hydrogen refueling pumps would remain at a 30% credit; however, the cap for hydrogen refueling pumps is increased to \$200,000. In addition, the Recovery Act increases the alternative refueling property credit for individuals from 30% to 50% (capped at \$2,000). In previous years, individuals who were seeking this tax credit had to submit an Internal Revenue Service (IRS) Form 8911 when they filed their taxes.

To date, no further details have been released about this program.

### Plug-in Electric Drive Vehicle Credit

**Agency:**

Internal Revenue Service (IRS)

<http://www.irs.gov>

**Eligibility:** Late last year, Congress passed into a law a tax credit for qualified plug-in electric drive vehicles.

**Description:** Batteries of at least 4 kWh qualify for a \$2,500 credit. An additional \$417 is provided for each additional kWh, up to \$7,500 for vehicles up to 10,000 lbs. Vehicles up to 14,000 lbs qualify for a \$10,000 credit. Vehicles between 14,000 and 26,000 lbs qualify for a \$12,500 credit. Vehicles over 26,000 lbs qualify for a \$15,000 credit. The American Recovery and Reinvestment Act modifies this existing law by

limiting the maximum credit to \$7,500 regardless of vehicle weight and eliminates the credit for vehicles weighing 14,000 lbs or more.

## Unemployment Insurance

**Administrator:**

Massachusetts Division of Unemployment Assistance (DUA)

[http://www.mass.gov/?pageID=elwdagencylanding&L=4&L0=Home&L1=Government&L2=Departments+and+Divisions+\(EOLWD\)&L3=Division+of+Unemployment+Assistance&sid=Elwd](http://www.mass.gov/?pageID=elwdagencylanding&L=4&L0=Home&L1=Government&L2=Departments+and+Divisions+(EOLWD)&L3=Division+of+Unemployment+Assistance&sid=Elwd)

To File: 877.626.6800

Haverhill Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lawrence Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lowell Area: Career Center of Lowell

<http://www.cclowell.org>

978-458-2503

Southern Region of District: Career Center of North Central Massachusetts

<http://www.ccnm.com/>

978-534-1481

**Eligibility:** Unemployment Insurance is a temporary income protection program for workers who have lost their jobs but are able to work, available for work and looking for work.

**Description:** Congress has passed an expansion of the Emergency Unemployment Compensation (EUC) Program effective July 7, 2008 through March 28, 2009. On November 23, 2008, this federal extension was expanded to provide up to 20 additional weeks of unemployment benefits (this extension originally provided up to 13 additional weeks).

Effective February 15, 2009, up to an additional 13 weeks of Extended Benefits is available through the EUC Program.

## Pell Grants

**Agency:**

U.S. Department of Education, Federal Pell Grant Program

<http://www.ed.gov/programs/fpg/index.html>

800.433.3243 or 800.4FED.AID

**Eligibility:** The Federal Pell Grant Program provides need-based grants to low-income undergraduate and certain postbaccalaureate students to promote access to postsecondary education.

**Description:** There are currently 103,000 Pell grant recipients in Massachusetts. Under the agreement, the maximum discretionary Pell grant would increase by \$500, to \$4,860, for the 2009-2010 academic year. The measure also includes \$1.5 billion in mandatory Pell grant funding, which would provide an increase of up to \$490 per year required by the College Cost Reduction and Access Act (PL 110-84). With mandatory funding included, the maximum Pell award would be \$5,350.

Students may use their grants at any one of approximately 5,400 participating postsecondary institutions. Grant amounts are dependent on: the student's expected family contribution (EFC) (see below); the cost of attendance (as determined by the institution); the student's enrollment status (full-time or part-time); and whether the student attends for a full academic year or less.

Students may fill out the Free Application for Federal Student Aid (FAFSA) to determine if they are eligible to receive a Federal Pell Grant or Work-Study funds.

<http://studentaid.ed.gov/PORTALSWebApp/students/english/index.jsp>  
800.433.3243 or 800.4FED.AID

### Community Service Employment for Older Americans

**Agency:**

U.S. Department of Labor, Employment and Training Administration (ETA)

<http://www.doleta.gov/>

877.US.2JOBS

For part-time employment opportunities for low income seniors, as described at

<http://www.doleta.gov/seniors/>

**Description:** The Senior Community Service Employment Program (SCSEP) is a community service and work based training program for older workers. It was authorized by Congress in Title V of the Older Americans Act of 1965 to provide subsidized, part-time, community service work based training for low-income persons age 55 or older who have poor employment prospects. Through this program, older workers have access to the SCSEP services as well as other employment assistance available through the One-Stop Career Centers of the workforce investment system.

Haverhill Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lawrence Area: ValleyWorks Career Center

<http://www.valleyworks.cc>

978-722-7000

Lowell Area: Career Center of Lowell

<http://www.cclowell.org>

978-458-2503

Southern Region of District: Career Center of North Central Massachusetts

<http://www.ccncm.com/>

978-534-1481

### Emergency Shelter Grant/Homelessness Prevention Fund

**Administrator:**

Massachusetts Department of Housing and Community Development

[http://www.mass.gov/?pageID=eheadterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd\\_cd\\_wap\\_wap&csid=Ehed](http://www.mass.gov/?pageID=eheadterminal&L=3&L0=Home&L1=Community+Development&L2=Housing+Energy+Programs&sid=Ehed&b=terminalcontent&f=dhcd_cd_wap_wap&csid=Ehed)

Greater Lawrence Area: Greater Lawrence Community Action Council, Inc. (GLCAC)

978.681.4900

Greater Lowell: Community Teamwork, Inc. (CTI)

978.459.6161

Haverhill Area: Community Action, Inc. (CAI)

978.373.1971

Southern District: South Middlesex Opportunity Council, Inc. (SMOC)

800.286.6776

**Description:** Including: short-term or medium-term rental assistance, and housing relocation and stabilization services, including such activities as mediation, credit counseling, security or utility deposits, utility payments, moving cost assistance, and case management.

[http://www.mass.gov/?pageID=eheadterminal&L=5&L0=Home&L1=Economic+Analysis&L2=Executive+Office+of+Housing+and+Economic+Development&L3=Department+of+Housing+and+Community+Development&L4=Contact+Listings&sid=Ehed&b=terminalcontent&f=dhcd\\_contacts\\_homelessprevention&csid=Ehed](http://www.mass.gov/?pageID=eheadterminal&L=5&L0=Home&L1=Economic+Analysis&L2=Executive+Office+of+Housing+and+Economic+Development&L3=Department+of+Housing+and+Community+Development&L4=Contact+Listings&sid=Ehed&b=terminalcontent&f=dhcd_contacts_homelessprevention&csid=Ehed)

### Nutrition Assistance

**Administrator:**

Massachusetts Office of Health and Human Services

<http://www.mass.gov/?pageID=eohhs2subtopic&L=5&L0=Home&L1=Consumer&L2=Basic+Needs&L3=Food+%26+Nutrition&L4=Food+Stamp+Benefits&sid=Eeohhs2>

800.249.2007

Lowell DTA Office: 978.446.2400

Lawrence DTA Office: 978.725.7100

FoodSource Hotline: 800.645.8333

**Eligibility:** Food stamp eligibility depends on household size, assets, income and certain living expenses.

**Description:** Food Stamps is a nutrition program for families and individuals that meet certain income and resource guidelines. Food Stamp benefits help you buy nutritious food for your family. You can be working and still qualify for Food Stamps. If you qualify for Food Stamps you can use these benefits to purchase food at most grocery stores, convenience stores and food markets.

### Senior Meals Programs

**Administrator:**

Massachusetts Elder Services

<http://www.mass.gov/?pageID=elderstopic&L=2&L0=Home&L1=Meals+and+Nutrition&sid=Elders>

800.882.2003

Merrimack Valley Nutrition Project.

978.686.1422

Minuteman Home Care Corporation

781.272.7177

Montachusett Elderly Nutrition Program

800.286.3441

South Middlesex Opportunity Council

508.872.6579

**Eligibility:** Food stamp eligibility depends on household size, assets, income and certain living expenses.

**Description:** Senior meals programs bring seniors together to eat in group settings and deliver nutritional and dietary safe meals to seniors.

### Supplemental WIC Nutrition Program

**Administrator:**

Massachusetts Office of Health and Human Services

<http://www.mass.gov/?pageID=eohhs2subtopic&L=5&L0=Home&L1=Consumer&L2=Basic+Needs&L3=Food+%26+Nutrition&L4=Food+Stamp+Benefits&sid=Eoehhs2>

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**Eligibility:** Food stamp eligibility depends on household size, assets, income and certain living expenses.

**Description:** Food Stamps is a nutrition program for families and individuals that meet certain income and resource guidelines. Food Stamp benefits help you buy nutritious food for your family. You can be working and still qualify for Food Stamps. If you qualify for Food Stamps you can use these benefits to purchase food at most grocery stores, convenience stores and food markets.

## COBRA

**Agency:**

U.S. Department of Labor (DOL)

<http://www.dol.gov/ebsa/cobra.html>

**Administrator:**

COBRA Benefits Advisor

866.444.3272

**Eligibility:** To qualify for premium assistance, a worker must have been involuntarily terminated between Sept. 1, 2008 and Dec. 31, 2009.

**Description:** The measure provides for a 65% federal subsidy for health insurance premiums under COBRA for up to nine months for workers (and their families) who have been involuntarily terminated.