

December 24, 2014

**Re: The Fiscal Year 2015 Statement of Interest Opening**

Dear Superintendent:

The Massachusetts School Building Authority (the “MSBA”) is pleased to announce that we will begin accepting Statements of Interest (“SOIs”) for consideration in Fiscal Year 2015 **on Friday January 9, 2015**. The following provides program details and closing date information to guide local actions and approvals for those planning to file:

- The SOI closing date for districts submitting under the Accelerated Repair Program (“ARP”), which is primarily for the repair and/or replacement of windows, roofs, and/or boilers in an otherwise structurally sound facility, will be **February 13, 2015**.
- The SOI closing date for districts submitting under the CORE Program, which is primarily for projects beyond the scope of ARP, including extensive repairs, renovations, addition/renovations, and new school construction, will be **April 10, 2015**.

Submitting an SOI is the critical first step in the MSBA’s program for school building construction, addition/renovation, and repair grants. It allows districts to inform us about deficiencies that may exist in a local school facility and how those deficiencies inhibit the delivery of the district’s educational program.

Submitting an SOI should not be difficult, and districts **do not** need to seek professional assistance to complete an SOI. **The process of completing and submitting an SOI will, however, require dedicated time from the district to comply with the submission requirements, especially the local vote requirements.** We recommend that districts plan ahead and allocate sufficient time to answer the questions posed in the SOI, compile the requested material and information, secure the appropriate signatures, and take the required local votes.

**SUBMITTING AN SOI**

This year the MSBA is introducing a new process by which districts will be able to assign district user access to the MSBA’s SOI System. Superintendents will be asked to complete a

District Access Form, which will be available on the MSBA's website once the SOI System is open for FY2015. Once the access form is filled out, signed and sent to the MSBA, the Superintendent will then be able to authorize district user access to the system, as deemed necessary for submitting an SOI. A separate email will be sent to Superintendents with additional information about the user access process.

To assist districts with filing an SOI that has been previously submitted, the MSBA can recall data that was provided in a prior SOI submission and populate a new SOI with that data. The district can then edit the information and update the SOI prior to submitting it for consideration in FY2015. Districts that wish to pre-populate an FY2015 SOI template with data that was previously provided to the MSBA will be required to submit a signed pre-population request form. **Please note that the MSBA requires that districts take new local votes authorizing the district to submit an FY2015 SOI, even if an SOI for the same school facility was submitted in a previous year.**

For **all** SOI submissions, the district will need to provide:

- (1) a hard copy of the SOI with the required signatures; there are two locations in each SOI where district officials will need to sign;
- (2) a hard copy of the Closed Schools information with required signatures;
- (2) hard copies of the required local vote documentation that is detailed in the SOI; and
- (3) any supporting materials that are required to be submitted with the SOI.

**We strongly urge districts to review the dates of the SOI submission period and schedule the necessary votes as soon as possible in order to meet the February 13, 2015 deadline for ARP SOIs and the April 10, 2015 deadline for CORE Program SOIs.**

### **PRIORITIZING SOIs**

Districts should submit one SOI per school for each school they believe requires a project, however, an SOI should only be filed for a facility where a district has the ability to fund a project in the next two years. Any district that submits multiple SOIs will be required to select one SOI as its "district priority SOI" for consideration and due diligence efforts by the MSBA. If the district already has an SOI in our capital pipeline, that SOI is the district's priority for FY2015 and will continue to be considered the district's priority SOI until the time of project completion. With each FY2015 SOI that is submitted online, the district will need to designate its "district priority SOI" among the schools in its district. Please note that a district may apply simultaneously for multiple facilities that it feels may be candidates for ARP (generally projects for the repair and/or replacement of windows, roofs, and/or boilers), but the district should still designate one SOI as its district priority.

We encourage districts to assess current, near-term, and long-term facility needs and plan SOI submissions accordingly. If a district has an upcoming need that it does not wish to address for several years, the district should consider waiting to submit an SOI for that facility until such time as the district is ready to move forward to address the issue.

### **SOI DEADLINE AND MSBA REVIEW**

A properly completed SOI and all the required documentation, including the required votes of the municipal governing body and school committee, a signed copy of the SOI, and all applicable closed schools data, must be postmarked no later than February 13, 2015, for consideration in the Accelerated Repair Program, and April 10, 2015 for consideration in the MSBA CORE Program. **The MSBA will not consider any potential projects for funding without a properly completed and submitted SOI.**

### **Accelerated Repair SOI Submissions Accepted: January 9, 2105 – February 13, 2015**

The MSBA Accelerated Repair Program (“ARP”) encourages all eligible applicants to apply, but the program is not appropriate for all potential projects. The ARP is for the partial or full replacement of roofs, windows, and boilers. As a project would not qualify for ARP, a district should not file an SOI for ARP if:

- the roof/boiler/windows are less than twenty years old;
- the proposed project cost is projected as less than \$250,000;
- the school is judged by the district to be over-crowded;
- the primary use of the building is for non-educational purposes;
- the SOI itself seeks construction beyond roofs, windows, or boilers;
- the SOI itself seeks boiler construction, excluding heating fuel storage and/or delivery, beyond the physical limits of the existing boiler room(s);
- or, the district plans a future construction project for MSBA participation going beyond roofs, windows, and boilers for the school.

In some cases, a project which is inappropriate for the MSBA ARP may be appropriate for the MSBA CORE program.

Please note that the MSBA may be constrained to limit the number of ARP projects in which it participates based on the number of SOIs that are received in a given fiscal year and on the MSBA’s available funds. Among the factors, the MSBA may consider, should it be required to limit the number of ARP projects, the degree of the disrepair of the systems to be replaced, and the frequency with which issues associated with that disrepair arise.

The review process for ARP SOIs will begin once the district has submitted a properly completed SOI and all the required documentation, including the required votes of the municipal governing body and the school committee.

**CORE Program SOI Submissions Accepted: January 9, 2015 – April 10, 2015**

MSBA review of CORE program SOIs will begin after the April 10, 2015 deadline, and the MSBA will not issue any decisions for any potential projects in FY2015 until (1) the MSBA has received and reviewed the entire cohort of CORE Program SOIs, and (2) the MSBA has performed due diligence on district selected priority SOIs. Depending on the number of SOIs that are submitted, this review process will likely take several months, and invitations to Eligibility Period are anticipated for fall/winter FY2016 Board meetings.

If you are considering submitting an SOI and have any questions about the FY2015 SOI process, please see the SOI Frequently Asked Questions on the MSBA's website: [www.massschoolbuildings.org/2015\\_SOI\\_FAQs](http://www.massschoolbuildings.org/2015_SOI_FAQs) or contact Diane Sullivan by phone at 617-720-4466.

Sincerely,

A handwritten signature in black ink that reads "John K. McCarthy". The signature is written in a cursive, flowing style.

John K. McCarthy  
Executive Director