

January 6, 2014

## The Fiscal Year 2014 SOI Opening

Dear Superintendent:

The Massachusetts School Building Authority (“MSBA”) is pleased to announce that we will begin accepting Statements of Interest (“SOIs”) for consideration in Fiscal Year 2014 **on Friday, January 10, 2014**. Submitting an SOI is the critical first step in the MSBA’s program for school building construction, addition/renovation, and repair grants. The SOI 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.

As stated in the letter that was sent to districts on December 5, 2013 regarding the FY 2014 SOI process, the SOI submission deadlines are as follows:

- The SOI closing date for districts submitting for consideration in 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, is **Friday, February 14, 2014**.
- The SOI closing date for districts submitting for consideration in the Core Program, which is primarily for projects beyond the scope of the Accelerated Repair Program, including extensive repairs, renovations, addition/renovations, and new school construction, is **Friday, April 11, 2014**.

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**

To submit an SOI, the district should complete the attached MSBA System Access Request Form to receive a username and password to log into our SOI system and submit the SOI and any applicable closed schools data electronically. **The MSBA will only issue user access to district employees or district officials. If you received a username and password from us for previous SOI filing periods, they are no longer active.**

To assist districts with filing a previously submitted SOI, we can recall data that was provided in a previous SOI submission for a school facility 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 FY 2014. To request that we pre-populate an FY 2014 SOI template with data that was previously provided, please complete the necessary information on the attached MSBA System Access Request Form. **Please note, we require that districts take new local votes authorizing the district to submit an FY 2014 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 the required signatures;
- (2) hard copies of the required local vote documentation, as detailed in the SOI; and
- (3) any supporting materials that are required to be submitted with the SOI.

**We urge districts to review the deadlines for FY 2014 SOI submissions and schedule the necessary votes as soon as possible in order to meet the February 14, 2014 deadline for ARP SOIs and the April 11, 2014 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 FY 2014 and will continue to be considered the district’s priority SOI until the time of project completion. With each FY 2014 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 the Accelerated Repair Program (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 closed schools data, must be postmarked no later than February 14, 2014 for consideration in the Accelerated Repair Program and by April 11, 2014 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 SOIS**

*Submissions accepted from January 10, 2104 – February 14, 2014*

The Accelerated Repair Program is primarily for the repair and/or replacement of roofs, windows, and/or boilers.

Participation in the Accelerated Repair Program requires Districts to:

- 1) use pre-qualified OPMs and designers;
- 2) appropriate funding quickly in order to adhere to an accelerated project schedule; and
- 3) complete the project within 18 months of the invitation to the Program by the MSBA Board of Directors.

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

### **CORE PROGRAM SOIS**

*Submissions accepted from January 10, 2014 – April 11, 2014*

MSBA review of Core Program SOIs will begin after the April 11, 2014 deadline. The MSBA will not issue any decisions for any potential projects in FY 2014 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 could take several months. Invitations to the MSBA Eligibility Period are anticipated at the fall/winter 2014 Board meetings.

If you are considering submitting an SOI and have any questions about the FY 2014 SOI process, please see the SOI Frequently Asked Questions on the MSBA's website ([www.massschoolbuildings.org/2014\\_SOI\\_FAQs](http://www.massschoolbuildings.org/2014_SOI_FAQs)) or contact Brian McLaughlin, Capital Program Manager, by e-mail at [Brian.McLaughlin@MassSchoolBuildings.org](mailto:Brian.McLaughlin@MassSchoolBuildings.org) or 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