December 11, 2013

FY14 Foundation Reserve Program

Application Instructions

The Legislature has approved funding for the for the FY14 foundation reserve ("pothole") program [7061-0011]. The pothole program is intended to provide supplemental financial assistance to cities, towns, and school districts to address a variety of special circumstances. Municipalities and districts may apply for these funds in accordance with these instructions.

- Foundation reserve funds will be awarded in three different categories, as described in the accompanying application forms (WORD | PDF). Applicants should submit the appropriate form for each category for which they are eligible.

- Category A is for municipal relief. Applications in this category must be submitted on behalf of a city or town by the mayor, town manager, or board of selectmen. Awards in this category will be treated as unrestricted state aid and may be appropriated by the municipality for any purpose.

- Categories B and C are for supplemental educational funding. Applications in these categories must be submitted on behalf of a local or regional school district by the superintendent of schools. Awards in these categories will be treated as school aid and may be expended by the school committee without further appropriation. Please note that charter schools are not eligible for foundation reserve awards.

- Applications must be submitted by mail to the address below, and must be received no later than close of business on January 31, 2014. Fax and email submissions cannot be accepted.

Massachusetts Department of Elementary and Secondary Education
Attn: Christine M. Lynch
75 Pleasant Street
Malden, MA 02148-5023

- Award amounts will be determined by the Commissioner of Elementary and Secondary Education and will depend in part on the number of applications received, the size of the municipality or district, and the financial need for which the award is made.

Please note that foundation reserve awards are one-time awards that are not included in base aid calculations for chapter 70 aid in future years.

Questions regarding the foundation reserve program should be directed to program director Christine M. Lynch at 781-338-6520 or at clynch@doe.mass.edu.
Category A: Extraordinary increase in total minimum required local contribution

Eligibility: Cities and towns (a) to meet extraordinary increases in the total required local contribution (for all school districts to which the municipality belongs) from FY13 to FY14; and (b) who are ineligible for a DOR municipal contribution waiver.

City or town: _______________________________

| FY13 total required local contribution | $______________ |
| FY14 total required local contribution | $______________ |
| Percent increase | ________% |

- By submitting this application, it is attested that the municipality has applied for a waiver from the department of revenue (DOR) and is ineligible for a DOR municipal contribution waiver. If you are unsure as to your eligibility for a DOR waiver, see the requirements in St. 2013, c.38, s.71, or contact DOR’s Division of Local Services.

Contact person if further information is required:

Name: _____________________________________________________
Telephone: _____________________________________________________
Email: _____________________________________________________

Application submitted by: (mayor/town manager/board of selectmen)

_________________________________________________ Date_____/_____/2014

Signature

Print name/title
FY14 Foundation Reserve Application

Category B: Relief for Districts with high enrollment growth between FY13 and FY14 and whose chapter 70 aid as a percentage of total foundation budget is less than the district’s target aid percentage.

Eligibility: Districts with (1) a foundation enrollment growth of greater than 325 pupils from FY13 to FY14 and (2) whose chapter 70 aid as a percentage of total foundation budget is less than the district’s target aid percentage.

School District: __________________________________________________________

Please provide the following information:

- FY13 foundation enrollment: _________________________________
- FY14 foundation enrollment: _________________________________
- FY14 Target Aid Percent: _________________________________
- FY14 Chapter 70 aid: _________________________________
- FY14 Foundation budget: $_______________________________

Contact person if further information is required:

Name: ____________________________________________________________
Title: ____________________________________________________________
Telephone: _______________________________________________________
Email: ___________________________________________________________

Application submitted by: (Superintendent of Schools)

_________________________________________________________ Date ____/____/2014
Signature

__________________________________________________________
Print Name

__________________________________________________________
Print Title
FY14 Foundation Reserve Application

Category C: Relief for Districts for unexpected or unanticipated financial issues.

Eligibility: School Districts

School District: ____________________________________________________________

Amount Requested: $_____________________________________________________

Please describe the circumstances justifying your request. (Attach additional pages as necessary.) Applications to support a capital need will not be considered.

Contact person if further information is required:

Name:_______________________________________________________

Title:_________________________________________________________

Telephone:___________________________________________________

Email:________________________________________________________

Application submitted by: (Superintendent of Schools)

_________________________________________________Date_____/_____/2014

Signature

__________________________________________________

Print Name

__________________________________________________

Print Title