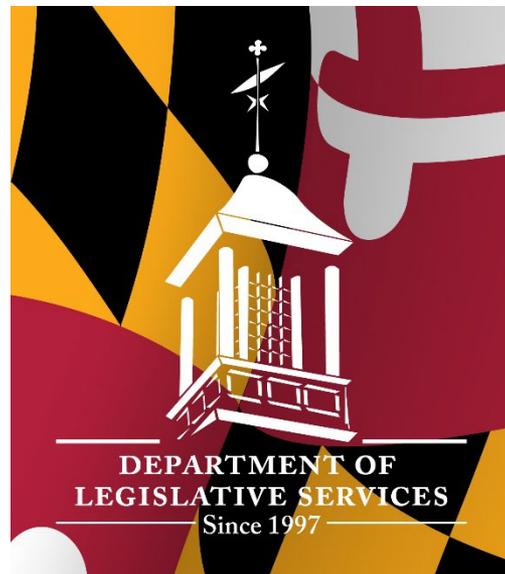
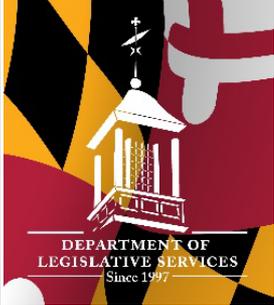

How to Request a Legislative Bond Initiative



December 2023



What Is a Legislative Bond Initiative?

Legislative Bond Initiatives (LBI), formerly referred to as bond bills, are bond authorization requests filed by members of the Maryland General Assembly (MGA) to support specific local or non-State-owned capital projects.

Although not submitted as part of the Governor's capital budget, the authorization to fund an LBI is provided in the State's annual capital budget bill.

The Department of Legislative Services (DLS) reviews LBI requests in accordance with the rules and procedures established by MGA.



Project Eligibility

A project must

1. be capital in nature (land and/or structures),

such as

Real Property Acquisition
Project Planning & Design
Construction & Renovation

2. have a State or local public purpose,

like a

Community Center
Health Facility
Museum
Recreational Facility

3. have a 15-year service life

Additionally, a Grantee must own the property to be improved with the grant funds or have a long-term lease of at least 15 years. Otherwise, the State will require the property owner either be a co-grantee or agree to be a beneficiary in the grant agreement with the State.

Funds may not be used for:

Religious/sectarian purposes
Operating expenses
Certain Non-Capital Equipping
or Furnishings



Project Prioritization

- **Project Readiness**

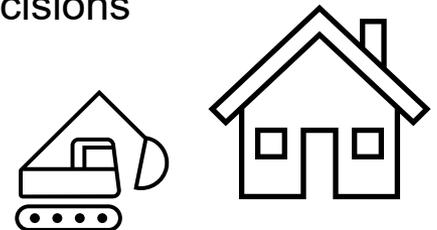
- 🕒 Adequate funding plan that demonstrates the availability and commitment of sufficient non-State funding sources to complete the project
- 🕒 Project schedule that supports the expeditious use of State grant funds. Project requests that can demonstrate that State grant funds will be expended within two years of authorization are given priority
- 🕒 Encumbrance and expenditures deadlines can be met within seven years of authorization unless otherwise specified in an act of the General Assembly)

- **Alternative funding sources**

- 🕒 Applicants that can demonstrate the availability of non-State funding sources are given priority in making funding decisions

- **Employment creation/retention**

- **Delegation support**





LBI Process: Request Form

Initiation of the Process

- Organizations must arrange legislative sponsorship.
- Members must complete an LBI Request Form and submit the form via email to LegislativeBondInitiative@mlis.state.md.us
- Members receive an email receipt upon submission of the Request Form.
- The Request Form is available on the MGA website under the Budget tab, then Bond Initiatives and then Documents, or on the members' floor system.
- **The name of the grantee must match the name that is on record with the State Department of Assessments and Taxation (SDAT).** Legal entity information can be found at <https://egov.maryland.gov/BusinessExpress/EntitySearch>

Maryland General Assembly Legislative Bond Initiative Request Form

[Click here for Guidelines](#)

Project Information

Project Name: _____
Project Location County: _____
Project Location Address: _____ (Street)
_____ (City, MD Zip)

Please list the year of any previous bond bills or initiatives for this project:

Total Amount Requested: \$ _____

Briefly describe the purpose and reason for the project:

Applicant Information

Legal Name of Grantee: _____
(If a corporation or non-profit organization, give name exactly as registered with the State Department of Assessments and Taxation: <https://egov.maryland.gov/BusinessExpress/EntitySearch>. If a local government, give legal name as chartered.)

Legal Status of Grantee: Corporation Non-profit Local government Other
If other, please explain: _____

Grantee is governed by: Board of Directors Board of Trustees Other
If other, please explain: _____

Does the project, project property or recipient have any religious affiliation or involvement? Yes No

Project Contact Information:

Project Contact Name: _____ Address: _____
Project Contact Email: _____
Project Contact Phone: _____

Sponsor Information – TO BE FILLED-IN BY SPONSOR STAFF ONLY

Lead Sponsor Senator or Delegate

Lead Sponsor Name: _____ Email: _____

Co-Sponsors Information (2 max)

Co-Sponsor 1 Name: _____ Email: _____
Co-Sponsor 2 Name: _____ Email: _____

(Opposite Chamber)

Cross-File Sponsor Name: _____ Email: _____
Cross-File Sponsor 2 Name: _____ Email: _____
Cross-File Sponsor 3 Name: _____ Email: _____

Please submit this form from sponsor's email to LegislativeBondInitiative@mlis.state.md.us.



LBI Process: Request

- An LBI Request Form internally generates the next document, the Legislative Bond Initiative Request Document (the “Green Sheet”).
- A set of four copies of each Request Document is provided to the sponsor for introduction.
- Sponsor will deliver signed Documents to the Secretary of the Senate/Chief Clerk of the House for introduction during a floor session. (Only “clean” Request Documents are accepted – no handwritten changes.)
- LBIs must be requested by the 27th day (Senate) and the 31st day (House) as “guarantee” dates. As with Bills, the 55th day is the final day for introduction without suspension of the rules.

Appendix 4
2020 Legislative Bond Initiative





The following Legislative Bond Initiative is submitted for the General Assembly’s consideration for funding.

Sponsor Delegate Kirill Reznik

Synopsis Requesting the creation of a State Debt in the amount of \$400,000, the proceeds to be used as a grant to the Board of Directors of Residential Continuum, Inc. for the acquisition, planning, design, construction, repair, renovation, reconstruction, site improvement, and capital equipping of RCI group homes, located in Montgomery County.

	<u>Name</u>	<u>Signature</u>
Sponsor	Delegate Kirill Reznik	_____
Co-Sponsor	Co-sponsor1	_____
Co-Sponsor	Co-Sponsor2	_____

Instructions: This is an official Legislative Bond Initiative (LBI) document.
Please sign where indicated and obtain the signatures of any cosponsors.
Please note there is a maximum of three sponsors per LBI.
Once all signatures have been obtained, the document can be delivered to the Secretary of the Senate/Chief Clerk for formal introduction.

NOTE: If you need changes made to the LBI document before it is introduced, the **changes must be approved** and entered into the LBI System by the **Department of Legislative Services (DLS)**. The Secretary of the Senate/Chief Clerk will **NOT** accept a document for introduction that includes changes not approved by DLS. To have any necessary changes approved, please email Valerie Kwiatkowski at: valk@mlis.state.md.us. Once changes have been made a new LBI document will be printed and delivered to the sponsor.



LBI Process: Introduction

- Upon submission of an LBI, an introductory LBI letter is created to be read across the desk during a floor session and entered into the proceedings
- Once an LBI is entered into the proceedings, it is made available in a report on the MGA website under the Budget tab by selecting Bond Initiatives
 - The report displays all member LBIs but can be filtered by individual member. Each member's bill page also contains a link to the LBI report
- When an LBI is read across the desk and entered the proceedings, an email is sent to the requesting lead sponsor contact with instructions for completing an LBI Fact Sheet. The sponsor is responsible for sending the Fact Sheet to the requestor – designated grantee contact
- The email provides a PDF copy of the *Guidelines for the Submission of Legislative Bond Initiative Requests to the General Assembly of Maryland*. These guidelines are also available on the MGA website under the Budget tab by selecting Bond Initiatives and then Documents



LBI Process: Fact Sheet

- **After** the LBI is introduced, the Fact Sheet is submitted electronically by **March 7th** through the fact sheet system
- It provides information to the legislature to make funding decisions – failure to submit a Fact Sheet may result in a decision not to fund a project
- **Sponsors** will receive an email from DLS that provides a link and access to the applicant's Fact Sheet; this email should be forwarded to the grantee. Information in fields one through nine are locked and cannot be changed by the applicant.
- Brevity is as important as accuracy

State Of Maryland Bond Initiative Fact Sheet		
1. Name Of Project		
2. Senate Sponsor		3. House Sponsor
4. Jurisdiction (County or Baltimore City)		5. Requested Amount
6. Purpose of Bond Initiative		
the acquisition, planning, design, construction, repair, renovation, reconstruction, site improvement, and capital equipping of		
7. Matching Fund		
Requirements:		Type:
Grant		
8. Special Provisions		
<input type="checkbox"/> Historical Easement		<input checked="" type="checkbox"/> Non-Sectarian
9. Contact Name and Title		Contact Ph# Email Address
10. Description and Purpose of Organization (Limit length to visible area)		



LBI Process: Tracking

- LBI status can be tracked from the MGA website:
<https://mgaleg.maryland.gov/mgawebsite/Budget/BondInitiatives>
- As each LBI is introduced and entered into the proceedings, the *Introduction of Legislative Bond Initiatives Report* is populated (available on the Budget tab by selecting Bond Initiatives). This report is also linked to each sponsor's bill page
- LBI Fact Sheets can be accessed and viewed and funding decisions tracked
- Prior session versions of the *Introduction of Legislative Bond Initiatives Report* can be accessed from the MGA website under the Search & Archives tab, selecting Bond Initiatives, and using the dropdown menu to select a year



LBI Process: Tracking (Cont.)



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Bond Initiatives

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Sponsors
All

Showing 1 to 1 of 1 entries (filtered from 459 total entries)
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Filter: renovation and Expansion

Project Name	Status	House Sponsors	Senate Sponsors	County	Amount Requested	Senate Initiative	House Initiative	Other Funding	Total Funding
Community Food Pantry Example	Introduced	Name	Name	Baltimore	\$500,000	\$100,000	\$75,000	\$25,000	\$200,000



Legislative Schedule

- **December 1 Until the First Day of Session**

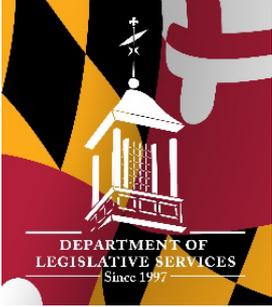
- Sponsors may begin to request LBIs. All LBIs requested before the first day of session will be available to the sponsor on the first day of session

- **First Day of Session Until Bill Introduction Date**

- LBIs must be requested by the 27th day (Senate) and the 31st day (House) as “guarantee” dates

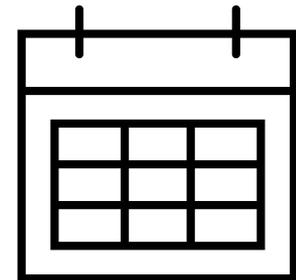
- **Bill Introduction Date Until the Last Day of Session**

- DLS guarantees the sponsor will have what they need by the 55th day to drop signed LBI Request Forms with the clerks for introduction. After the 55th day, the clerk will accept LBI’s, but introduction will require the suspension of the rules



Legislative Schedule (Cont.)

- **Mid-March**
 - Senate Budget and Taxation Committee and House Appropriations Committee hold hearings on LBIs
- **March/April**
 - Budget committees vote on LBIs
 - Both chambers vote on the final package of LBIs as part of the capital budget
- **June 1**
 - Effective date for LBIs



Post Authorization Grant Process



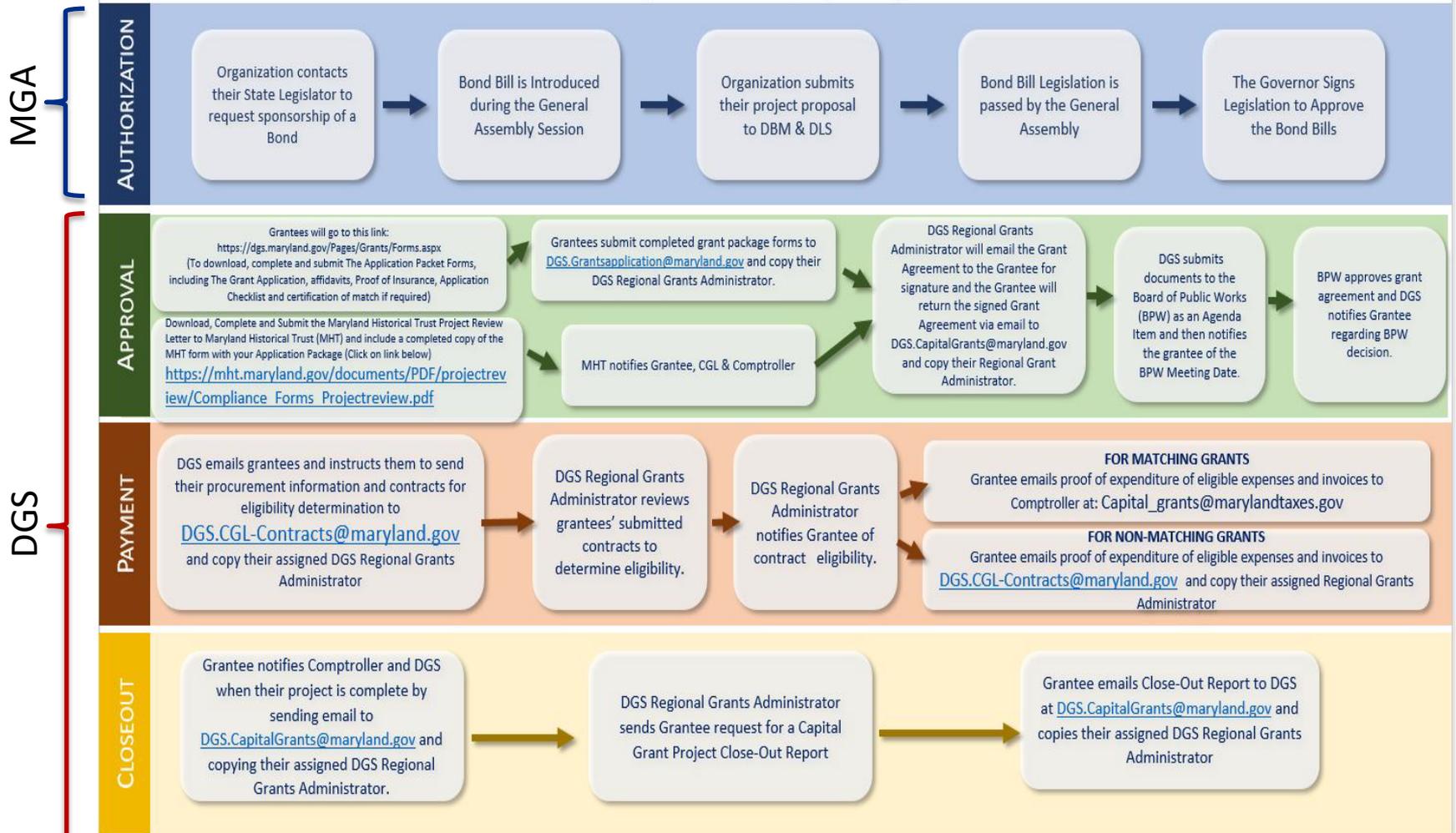
- Following official designation of an LBI as a State capital grant, grantees work with the Department of General Services (DGS) to obtain grant funds
- Grantees must enter into a grant agreement with the State – administered by DGS
- Although the Board of Public Works (BPW) ultimately determines whether a grantee has met all grant requirements, DGS is the point of contact for grantees post legislative authorization

Information regarding the DGS grant process is available from their website at:

<https://dgs.maryland.gov/Pages/Grants/index.aspx>



Flow Chart of Process





Termination Provisions

- Authorizations may terminate in whole or in part
 - if the grantee fails to enter into a grant agreement with the State within two years
 - if the grantee fails to certify a matching fund, if required, within two years
 - if funds remain unencumbered and unexpended seven years after authorization unless otherwise specified in an act of the General Assembly
- Termination notification
 - DGS sends notification letters to the grantee contacts and any legislative sponsor each January and again approximately 30 days prior to any BPW actions to terminate



Important Publications and Links

- Guidelines for the Submission of Legislative Bond Initiative Requests to the General Assembly of Maryland:
<http://mgaleg.maryland.gov/pubs-current/current-bond-initiative-submission-guidelines.pdf>
- Legislative Bond Initiative Request Form:
<https://mgaleg.maryland.gov/pubs-current/current-bond-initiative-info-sheet.pdf>
- Submit the completed request form to:
LegislativeBondInitiative@mlis.state.md.us
- Department of General Services Grants Guide:
<https://dgs.maryland.gov/Pages/Grants/index.aspx>
- Maryland Capital Grants Projects Information for State of Maryland Capital Grant Recipients:
https://dgs.maryland.gov/Documents/grants/CGL_Booklet.pdf

