

ALASKA LEGISLATURE SPECIAL COMMITTEE/SUBJECT FILES 8672

2788 SCOMM 122: COMMISSION ON PRIVATIZATION. ., 1999 286

Component Summary - FY00 Operating Budget

Agency: Department of Education

Page	Budget Component	FY98 Act	FY99 CC	FY99Auth	Gov Amd	House	Senate	ConfComm	FY99Auth to ConfComm	
K-12 Support										
1	Foundation Program	652,353.8	660,931.3	680,728.2	695,660.3	692,990.0	689,054.3	689,054.3	8,326.1	1.2%
2	Additional District Support	3,445.9							0.0	0.0%
3	Cigarette Tax Distribution	2,608.4							0.0	0.0%
4	Tuition Students	2,213.9	1,921.2	1,921.2	2,225.0	2,225.0	2,225.0	2,225.0	303.8	15.8%
5	Boarding Home Grants	161.7	185.9	185.9	185.9	185.9	185.9	185.9	0.0	0.0%
6	Youth in Detention	557.5	800.0	800.0	800.0	800.0	800.0	800.0	0.0	0.0%
7	Schools for the Handicapped	3,734.9	3,801.7	3,801.7	3,840.5	3,840.5	3,840.5	3,840.5	38.8	1.0%
8	Pupil Transportation	35,195.2	36,620.6	38,082.1	39,775.1	39,775.1	39,775.1	39,775.1	1,693.0	4.4%
9	Child Nutrition	23,115.9	26,000.0	26,000.0	26,000.0	26,000.0	26,000.0	26,000.0	0.0	0.0%
10	Community Schools	499.3	500.0	500.0	500.0	400.0	500.0	400.0	-100.0	-20.0%
	* BRU Total	723,886.5	730,760.7	752,019.1	768,986.8	766,216.5	762,380.8	762,280.8	10,261.7	1.4%
School Debt Reimbursement										
11	School Debt Reimbursement	62,059.7	60,804.1	76,133.6	71,788.1	71,923.3	71,923.3	71,923.3	-4,210.3	-5.5%
	* BRU Total	62,059.7	60,804.1	76,133.6	71,788.1	71,923.3	71,923.3	71,923.3	-4,210.3	-5.5%
Teaching and Learning Support										
12	Special & Supplemental Service	45,723.2	50,339.8	50,345.6	50,345.6	50,345.6	50,345.6	50,345.6	0.0	0.0%
13	Quality Schools	19,059.7	27,736.4	29,638.0	31,138.0	30,700.8	30,670.8	30,670.8	1,032.8	3.5%
14	Education Special Projects	655.8	849.4	849.9	849.9	602.9	602.9	602.9	-247.0	-29.1%
15	Teacher Certification	526.6	690.8	692.8	692.8	692.8	692.8	692.8	0.0	0.0%
16	Child Nutrition Administration	545.4	726.1	727.7	727.7	727.7	727.7	727.7	0.0	0.0%
	* BRU Total	66,510.7	80,342.5	82,254.0	83,754.0	83,069.8	83,039.8	83,039.8	785.8	1.0%
Executive Administration										
17	State Board of Education	93.1	93.1	93.4	93.4	93.4	93.4	93.4	0.0	0.0%
18	Commissioner's Office	622.4			470.7	470.7	450.7	450.7	450.7	%
19	Office of the Commissioner		469.5	470.7	0.0	-0.0	0.0	0.0	-470.7	-100.0%
20	Administrative Services	1,363.5	1,379.2	1,385.5	1,385.5	1,365.3	1,365.3	1,365.3	-20.2	-1.5%
21	Unallocated Reduction						-208.2	-208.2	-208.2	0.0%
22	Information Services	627.1	795.8	797.8	797.8	797.8	747.8	747.8	-50.0	-6.3%
23	District Support Services	687.2	720.6	876.2	1,126.2	1,078.9	1,078.9	1,078.9	202.7	23.1%
24	Educational Facilities Support	531.5	608.1	685.6	685.6	685.6	685.6	685.6	0.0	0.0%
25	Donated Commodities	171.7	358.9	359.4	275.0	275.0	275.0	275.0	-84.4	-23.5%
	* BRU Total	4,096.5	4,425.2	4,668.6	4,834.2	4,766.7	4,488.5	4,488.5	-180.1	-3.9%
Alyeska Central School										
26	Alyeska Central School	4,047.1	4,116.1	4,119.6	8,505.7	5,835.4	5,810.4	5,810.4	1,690.8	41.0%

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Agency: Department of Education

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	Alyeska Central School									
	* BRU Total	4,047.1	4,116.1	4,119.6	8,505.7	5,835.4	5,810.4	5,810.4	1,690.8	41.0%
	Commissions and Boards									
27	Professional Teaching Practice	185.1	186.9	187.4	187.4	187.4	187.4	187.4	0.0	0.0%
28	Ak State Council on the Arts	939.9	1,156.7	1,157.9	1,107.9	1,107.9	1,107.9	1,107.9	-50.0	-4.3%
	* BRU Total	1,125.0	1,343.6	1,345.3	1,295.3	1,295.3	1,295.3	1,295.3	-50.0	-3.7%
	Kotzebue Technical Center									
29	Kotzebue Tech Operations	634.0	634.0	634.0	634.0	609.0	0.0	0.0	-634.0	-100.0%
	Grant									
	* BRU Total	634.0	634.0	634.0	634.0	609.0	0.0	0.0	-634.0	-100.0%
	Alaska Vocational Technical Center									
30	AVTEC Operations	5,167.6	4,952.1	4,956.5	5,405.1	5,368.1	5,368.1	5,368.1	411.6	8.3%
	* BRU Total	5,167.6	4,952.1	4,956.5	5,405.1	5,368.1	5,368.1	5,368.1	411.6	8.3%
	Mt. Edgecumbe Boarding School									
31	Mt. Edgecumbe Boarding	4,471.6	4,162.3	4,159.4	4,400.8	4,370.4	4,370.4	4,370.4	211.0	5.1%
	School									
	* BRU Total	4,471.6	4,162.3	4,159.4	4,400.8	4,370.4	4,370.4	4,370.4	211.0	5.1%
	State Facilities Maintenance									
32	State Facilities Maintenance				1,496.1	1,496.1	1,496.1	1,496.1	1,496.1	%
	* BRU Total	0.0	0.0	0.0	1,496.1	1,496.1	1,496.1	1,496.1	1,496.1	%
	Vocational Rehabilitation									
33	Client Services	9,719.8	11,539.0	11,562.0	13,677.5	13,629.5	13,415.0	13,408.4	1,846.4	16.0%
34	Federal Training Grant	31.1	56.3	56.3	56.3	56.3	56.3	56.3	0.0	0.0%
35	Voc Rehab Administration	958.6	1,121.6	1,124.0	1,383.0	1,383.0	1,383.0	1,383.0	259.0	23.0%
36	Independent Living Rehabilitat	1,146.4	1,273.2	1,273.5	1,348.5	1,348.5	1,348.5	1,348.5	75.0	5.9%
37	Disability Determination	4,212.2	4,198.5	4,205.0	4,955.0	4,955.0	4,955.0	4,955.0	750.0	17.8%
38	Special Projects	1,092.8	1,514.3	1,514.8	1,772.3	1,472.3	1,472.3	1,472.3	-42.5	-2.8%
39	Assistive Technology	580.1	980.1	980.7	843.7	843.7	843.7	843.7	-137.0	-14.0%
40	Americans With Disabilities	104.1	114.7	115.0	190.0	190.0	190.0	190.0	75.0	65.2%
	* BRU Total	17,845.1	20,797.7	20,831.3	24,226.3	23,878.3	23,663.8	23,657.2	2,825.9	13.6%
	Alaska Library and Museums									
41	Library Operations	4,341.2	4,594.4	4,607.0	4,757.0	4,757.0	4,635.8	4,635.8	28.8	0.6%
42	Archives	687.3	646.1	649.4	689.4	689.4	689.4	689.4	40.0	6.2%

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Agency: Department of Education

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Alaska Library and Museums										
43	Museum Operations	1,330.7	1,418.8	1,423.4	1,423.4	1,423.4	1,423.4	1,423.4	0.0	0.0%
44	Specific Cultural Programs	41.7	41.7	41.7	41.7	0.0	0.0	0.0	-41.7	-100.0%
	* BRU Total	6,400.9	6,701.0	6,721.5	6,911.5	6,869.8	6,748.6	6,748.6	27.1	0.4%
Alaska Postsecondary Education Commission										
45	Program Administration	871.9	988.2	991.6	1,050.3	1,050.3	1,050.3	1,050.3	58.7	5.9%
46	Student Loan Operations	6,185.1	6,492.5	6,523.6	6,530.1	6,530.1	6,530.1	6,530.1	6.5	0.1%
47	WICHE Student Exchange Program	82.2	83.0	83.0	85.0	85.0	85.0	85.0	2.0	2.4%
48	VWAMI Medical Education	1,350.4	1,355.0	1,355.0	1,435.0	1,435.0	1,285.0	1,435.0	80.0	5.9%
49	Federal Student Aid	243.8	80.0	80.0	0.0	0.0	0.0	0.0	-80.0	-100.0%
	* BRU Total	8,733.4	8,998.7	9,033.2	9,100.4	9,100.4	8,950.4	9,100.4	67.2	0.7%
*** Total Agency Expenditure		904,978.1	928,038.0	966,876.1	991,338.3	984,799.1	979,535.5	979,578.9	12,702.8	1.3%
Federal Funds		119,358.7	139,334.3	139,374.4	142,276.4	142,276.4	142,276.4	142,276.4	2,902.0	2.1%
General Funds		692,240.3	702,823.0	708,796.2	727,559.8	740,470.5	735,021.4	735,064.8	26,268.6	3.7%
Other Funds		93,379.1	85,880.7	118,705.5	121,502.1	102,052.2	102,237.7	102,237.7	-16,467.8	-13.9%

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July 28, 1999

Attention: Paul Fisher 262-4902

Dear Committee Member,

As you know we will be meeting this Friday, July 30, 1999 at 12:00pm. Please find the following attachments for your review before the meeting:

1. The Agenda for the meeting (one page)
2. A roster of members (one page)
3. A copy of Senate Bill No. 33 (four pages)
4. Agency Totals - FY00 Operating Budget (four pages)

Representative John Cowdrey will explain to us at this first meeting what our purpose and objectives are as committee members. Please be punctual since we would like to begin on time in order to get as much accomplished as possible by 1:30pm.

legislative fiscal analyst overview of the governor's request

DEPARTMENT OF EDUCATION

The Department of Education is responsible for funding and regulating the state's K-12 schools. The department also administers debt reimbursement and grants for school construction. In addition, the department administers adult and vocational education programs, the Alaska Vocational Technical Center (AVTEC) in Seward and the Kotzebue Technical Center, the Mt. Edgecumbe Boarding School, the Alyeska Central School, the Alaska State Libraries and Museums, and the Alaska State Council on the Arts. The Division of Vocational Rehabilitation and the Alaska Commission on Postsecondary Education are also within the Department of Education's budget.

SIGNIFICANT ISSUES

- In FY99, the Foundation Program utilized \$5,860,400 in general funds carried forward from FY98. That amount is included in the base for the FY00 budget. \$13,936,500 of AHFC receipts as funded in the FY99 budget (CH83 SLA98 - SB36) is also included to reach the FY99 authorized funding level. An additional \$14,438,000 in general funds and \$494,100 of Public School Funds (Other Funds) is requested for FY00. Enrollment increases from FY99 to FY00 are projected at 3.18%.

Legislative Fiscal Analyst comment: Of the total requested to fully fund the foundation formula, approximately \$9,909,000 is related to the remaining 40% of the FY99 funding increase for Districts that gained from the implementation of SB36.

- Other programs in K-12 Support add an additional \$2,035,600 to the general fund request including \$1,693,000 for increased pupil transportation costs, \$303,800 for increased enrollment for tuition students and \$38,800 for the Special Education Service Agency entitlement. The request also includes \$1,461,500 in AHFC receipts for pupil transportation as funded in the FY99 budget (CH83 SLA98 - SB36) to reach the FY99 funding level.
- Increments in Teaching and Learning Support, Quality Schools include general fund increases of \$1,000,000 for assessment and \$500,000 for the exit exam program. The request continues the use of \$1,892,000 in AHFC receipts as funded in the FY99 budget (CH83 SLA98 - SB36).
- Under School Finance, District Support Services increased general fund sources by \$250,000 for costs associated with District audits and monitoring District Cost Factors. The request continues the use of \$154,000 in AHFC receipts as funded in the FY99 budget (CH83 SLA98 - SB36).

Legislative Fiscal Analyst comment: The total dollar amount of AHFC receipts remaining in the department's request as continuations of FY99 appropriations is \$17,444,000.

- The Alyeska Central School budget included an I/A receipt (Other Funds) increase of \$4,386,100 for increased enrollment and funding changes. The funds will be used for curriculum, supplies, computer equipment and contract services.

Legislative Fiscal Analyst comment: The total dollar amount represents an increase of over 100% of FY99 authorized funding levels.

- The Vocational Rehabilitation budget requests an increase of general fund sources of \$190,000 to prevent the loss of federal funds due to maintenance of effort requirements. A fund source change of \$165,000 for the Business Enterprise Program replaces Statutory Designated Receipts with the Vocational Small Business fund source and requests an increase of \$50,000 from Vocational Small Business fund source.
- Other components within the department's budget requested general fund increases totaling \$332,000.
- The Debt Service budget includes a decrease of \$4,345,500 in the debt retirement fund. The debt retirement fund has been funded by general fund appropriations in prior years. The Governor's FY00 request utilizes a combination of general fund and AHFC receipts for this purpose. A funding source change of \$3,800,000 from the school fund to the debt retirement fund is made in anticipation of lower cigarette tax receipts.

legislative fiscal analyst overview of the governor's request

The following table summarizes the development of the Governor's request for School Debt:

	School Debt Fund	Retirement Fund	Total
FY99 Conference	34,000.0	26,804.1	60,804.1
Special Appropriation (CH139 Sec29 - SB231)	15,329.5	-	15,329.5
Reduced Cigarette Tax Receipts	(3,800.0)	3,800.0	-
Decrement for School Debt		(4,345.5)	(4,345.5)
FY00 Governors Request	45,529.5	26,258.6	71,788.1

The decrement adjusts authorization based on improved estimates of debt service for local bonding, authorized in FY99 by SB11.

ORGANIZATIONAL CHANGES

The Commissioner's Office moves into the Executive Administration component. Also the department created a new Facilities Maintenance BRU and component (Ch90 SLA98).

legislative fiscal analyst overview of the governor's request

DEPARTMENT OF EDUCATION FUNDING SUMMARY

	GF	Other	Federal	TOTAL
FY99 Conference Committee	702,823.0	85,880.7	139,334.3	928,038.0
Fiscal Notes	85.7	17,444.0		17,529.7
Special	5,860.4	15,329.5		21,189.9
FY98 COLA	27.1	51.3	40.1	118.5
FY99 Authorized	708,796.2	118,705.5	139,374.4	966,876.1
Specials		1,496.1		1,496.1
Fund Change	18.0	-18.0		0.0
Transfers In	238.8	333.1	292.0	863.9
Transfers Out	-238.8	-333.1	-292.0	-863.9
FY00 Adjusted Base	708,814.2	120,183.6	139,374.4	968,372.2
Increments	18,745.6	5,835.4	2,982.0	27,563.0
Decrements		-4,516.9	-80.0	-4,596.9
FY00 Governor Request	727,559.8	121,502.1	142,276.4	991,338.3

Position Summary	PFT	PPT	Tmp
FY99 Conference Committee	461.0	104.0	5.0
Fiscal Note	4.0	0.0	1.0
FY99 Authorized	465.0	104.0	6.0
Reconciliation RP position adjustments	1.0	-1.0	0.0
Position Adjustments	0.0	0.0	0.0
FY00 Adjusted	466.0	103.0	6.0
Increments	13.0	5.0	5.0
Decrements	0.0		0.0
FY00 Governor	479.0	108.0	11.0

legislative fiscal analyst overview of the governor's request

DEPARTMENT OF ENVIRONMENTAL CONSERVATION

The Department of Environmental Conservation is a technical assistance, regulatory and grant-in-aid agency responsible for protecting the environment and public health. The agency administers programs for prevention and response to air, land and water pollution; enforces basic standards of sanitation in public facilities; assures wholesome meat, fish and dairy products for consumers; and provides financial and technical assistance to municipalities and local communities for water, sewer and solid waste projects. It also has lead responsibility for oil spill management and oversees the disposition of the Oil and Hazardous Substance Release Response and Prevention Fund.

SIGNIFICANT ISSUES

- A new component, Food Safety and Sanitation, is funded by a transfer in of \$697,900 from Animal Industries; a transfer in of \$2,783,300 from Seafood and Sanitation Inspection; and increment amounts of \$180,000 general funds and \$150,000 GF/program receipts. Incremental funding provides for increased frequency of public health inspections at high risk facilities, and includes four permanent full-time positions. Also, a fund source change of \$175,000 from one-time use of the Commercial Fisheries Loan Fund back to general funds is included in the new component.
- The Drinking Water component includes an increment of \$50,000 GF/program receipts for compliance with new requirements of the Safe Drinking Water Act.
- The Water Quality component includes an increment of \$1,150,000 federal receipts, \$150,000 general fund match, and four permanent full-time positions for increased efforts for salmon habitat protection.
- Facility Construction and Operations includes an increment of \$240,800 from the Alaska Drinking Water Fund (ADWF) and \$9,000 Clean Water funds that replaces federal funds for loan program administration and contractual auditing and loan servicing. The component also requests an increment of \$352,100 CIP receipts and four permanent full-time positions for increased Village Safe Water project management. These funds are needed due to increased federal grant funds.
- The agency is adding a net of 15 permanent full-time positions to the FY99 authorized position count, including the positions noted above.

ORGANIZATIONAL CHANGES

- Food Safety and Sanitation is a new component under Environmental Health BRU/appropriation, and was formed from a consolidation of Animal Industries component and Seafood and Sanitation Inspection component.
- Solid Waste Management is a new component under Environmental Health BRU/appropriation, and was formed from a consolidation of Municipal Solid Waste and Industrial Solid Waste components.

Legislative Fiscal Analyst comment: The agency considers this to be an adjustment to rename Municipal Solid Waste to Solid Waste Management, however, funding and positions were technically transferred out of Municipal Solid Waste to form Solid Waste Management. Municipal Solid Waste and Industrial Solid Waste were components formed from the Solid Waste component by the Legislature for FY98.

- Exxon Restoration component has been moved to the Administration BRU/appropriation.
- Statewide Public Services remains the only BRU that is not also an appropriation. The Statewide Public Services component under this BRU is part of the Environmental Health appropriation in the Governor's operating budget bill.

legislative fiscal analyst overview of the governor's request

DEPARTMENT OF ENVIRONMENTAL CONSERVATION FUNDING SUMMARY

	GF	Other	Federal	Total
FY99 Conference Committee	12,703.7	20,644.3	13,430.7	46,778.7
FY98 COLA	31.1	73.3	32.1	136.5
FY99 Authorized	12,734.8	20,717.6	13,462.8	46,915.2
Fund Change	188.6	-188.6		0.0
Transfers In	4,175.3	240.4	597.3	5,013.0
Transfers Out	-4,175.3	-240.4	-597.3	-5,013.0
FY00 Adjusted Base	12,923.4	20,529.0	13,462.8	46,915.2
Increments	530.0	745.9	1,150.0	2,425.9
FY00 Governor Request	13,453.4	21,274.9	14,612.8	49,341.1

Position Summary	PFT	PPT	Tmp
FY99 Conference Committee	488	5	4
FY99 Authorized	488	5	4
FY00 Adjusted Increments	488 15	5	4
FY00 Governor	503	5	4

legislative fiscal analyst overview of the governor's request

DEPARTMENT OF EDUCATION

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- In FY99, the Foundation Program utilized \$5,860,400 in general funds carried forward from FY98. That amount is included in the base for the FY00 budget. \$13,936,500 of AHFC receipts as funded in the FY99 budget (CH83 SLA98 - SB36) is also included to reach the FY99 authorized funding level. An additional \$14,438,000 in general funds and \$494,100 of Public School Funds (Other Funds) is requested for FY00. Enrollment increases from FY99 to FY00 are projected at 3.18%.

Legislative Fiscal Analyst comment: Of the total requested to fully fund the foundation formula, approximately \$9,909,000 is related to the remaining 40% of the FY99 funding increase for Districts that gained from the implementation of SB36.

- Other programs in K-12 Support add an additional \$2,035,600 to the general fund request including \$1,693,000 for increased pupil transportation costs, \$303,800 for increased enrollment for tuition students and \$38,800 for the Special Education Service Agency entitlement. The request also includes \$1,461,500 in AHFC receipts for pupil transportation as funded in the FY99 budget (CH83 SLA98 - SB36) to reach the FY99 funding level.
- Increments in Teaching and Learning Support, Quality Schools include general fund increases of \$1,000,000 for assessment and \$500,000 for the exit exam program. The request continues the use of \$1,892,000 in AHFC receipts as funded in the FY99 budget (CH83 SLA98 - SB36).
- Under School Finance, District Support Services increased general fund sources by \$250,000 for costs associated with District audits and monitoring District Cost Factors. The request continues the use of \$154,000 in AHFC receipts as funded in the FY99 budget (CH83 SLA98 - SB36).

Legislative Fiscal Analyst comment: The total dollar amount of AHFC receipts remaining in the department's request as continuations of FY99 appropriations is \$17,444,000.

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legislative fiscal analyst overview of the governor's request

DEPARTMENT OF EDUCATION FUNDING SUMMARY

	GF	Other	Federal	Total
FY99 Conference Committee	702,823.0	85,880.7	139,334.3	928,038.0
Fiscal Notes	85.7	17,444.0		17,529.7
Special	5,860.4	15,329.5		21,189.9
FY98 COLA	27.1	51.3	40.1	118.5
FY99 Authorized	708,796.2	118,705.5	139,374.4	966,876.1
Specials		1,496.1		1,496.1
Fund Change	18.0	-18.0		0.0
Transfers In	238.8	333.1	292.0	863.9
Transfers Out	-238.8	-333.1	-292.0	-863.9
FY00 Adjusted Base	708,814.2	120,183.6	139,374.4	968,372.2
Increments	18,745.6	5,835.4	2,982.0	27,563.0
Decrements		-4,516.9	-80.0	-4,596.9
FY00 Governor Request	727,559.8	121,502.1	142,276.4	991,338.3

Position Summary	PFT	PPT	Tmp
FY99 Conference Committee	461.0	104.0	5.0
Fiscal Note	4.0	0.0	1.0
FY99 Authorized	465.0	104.0	6.0
Reconciliation RP position adjustments	1.0	-1.0	0.0
Position Adjust ments	0.0	0.0	0.0
FY00 Adjusted	466.0	103.0	6.0
Increments	13.0	5.0	5.0
Decrements	0.0		0.0
FY00 Governor	479.0	108.0	11.0

legislative fiscal analyst overview of the governor's request

DEPARTMENT OF ENVIRONMENTAL CONSERVATION

The Department of Environmental Conservation is a technical assistance, regulatory and grant-in-aid agency responsible for protecting the environment and public health. The agency administers programs for prevention and response to air, land and water pollution; enforces basic standards of sanitation in public facilities; assures wholesome meat, fish and dairy products for consumers; and provides financial and technical assistance to municipalities and local communities for water, sewer and solid waste projects. It also has lead responsibility for oil spill management and oversees the disposition of the Oil and Hazardous Substance Release Response and Prevention Fund.

SIGNIFICANT ISSUES

- A new component, Food Safety and Sanitation, is funded by a transfer in of \$697,900 from Animal Industries; a transfer in of \$2,783,300 from Seafood and Sanitation Inspection; and increment amounts of \$180,000 general funds and \$150,000 GF/program receipts. Incremental funding provides for increased frequency of public health inspections at high risk facilities, and includes four permanent full-time positions. Also, a fund source change of \$175,000 from one-time use of the Commercial Fisheries Loan Fund back to general funds is included in the new component.
- The Drinking Water component includes an increment of \$50,000 GF/program receipts for compliance with new requirements of the Safe Drinking Water Act.
- The Water Quality component includes an increment of \$1,150,000 federal receipts, \$150,000 general fund match, and four permanent full-time positions for increased efforts for salmon habitat protection.
- Facility Construction and Operations includes an increment of \$240,800 from the Alaska Drinking Water Fund (ADWF) and \$9,000 Clean Water funds that replaces federal funds for loan program administration and contractual auditing and loan servicing. The component also requests an increment of \$352,100 CIP receipts and four permanent full-time positions for increased Village Safe Water project management. These funds are needed due to increased federal grant funds.
- The agency is adding a net of 15 permanent full-time positions to the FY99 authorized position count, including the positions noted above.

ORGANIZATIONAL CHANGES

- Food Safety and Sanitation is a new component under Environmental Health BRU/appropriation, and was formed from a consolidation of Animal Industries component and Seafood and Sanitation Inspection component.
- Solid Waste Management is a new component under Environmental Health BRU/appropriation, and was formed from a consolidation of Municipal Solid Waste and Industrial Solid Waste components.

Legislative Fiscal Analyst comment: The agency considers this to be an adjustment to rename Municipal Solid Waste to Solid Waste Management, however, funding and positions were technically transferred out of Municipal Solid Waste to form Solid Waste Management. Municipal Solid Waste and Industrial Solid Waste were components formed from the Solid Waste component by the Legislature for FY98.

- Exxon Restoration component has been moved to the Administration BRU/appropriation.
- Statewide Public Services remains the only BRU that is not also an appropriation. The Statewide Public Services component under this BRU is part of the Environmental Health appropriation in the Governor's operating budget bill.



and Delivery of Government Services

Co-Chairs:

Representative John Cowdery
Senator Jerry Ward

Senator Al Adams
Bill Allen
Representative Tom Brice
Tom Fink
William Prosser
Helvi Sandvik
Kathryn Thomas
Don Valesko
George Wuerch

August 10, 1999

Karen Rehfeld
Department of Education
Juneau, Alaska 99801

Dear Karen:

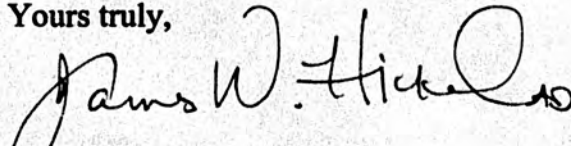
Here are some follow up questions that came up after our committee meeting. We plan to continue the briefings by different sections of the department but we want to prepare for questions that committee members already have on their mind. We'd appreciate it if you could help round up the information and answers.

- Organizational charts and number of personnel in each component in each BRU.
- A Departmental position paper on the pros and cons of a voucher system.
- For pass-through grant programs like the ones for Kotzebue School, Alyeska Central, Mt. Edgecumbe and Avtec, what are the student numbers and costs associated with each one. How much goes for admin costs as opposed to classroom costs. How does DOE monitor compliance. How does the cost allocation ratio compare to other Alaskan school districts.
- How old is the Department of Education. What did we do before we had it. Can it be dismantled and the responsibilities eliminated or transferred to local school districts. Does every state have a DOE.
- Can local school districts apply for federal funds without going through DOE.
- How many students K-12 in Alaska. How much funding from all sources do we spend on educating them. Is this information broken down by school district. How do these costs compare with other school districts around the country.
- What is the average size school district in the U.S. and in cities with similar-sized population.
- What does the DOE do to help bring efficiency to local school districts. For example, could Anchorage residents save money if ASD was eliminated and five independent school districts were established.

- In large part, teachers' and administrators' duties are segregated. Why can't teachers take on part of the administration responsibilities concurrent with teaching responsibilities.

Thanks for your help.

Yours truly,

A handwritten signature in dark ink, appearing to read "James W. Hickel". The signature is fluid and cursive, with a large initial "J" and a stylized "H".

James W. Hickel, Chairman
DOE Subcommittee
Privatization Commission

Subject: [Fwd: PTF Educ Subcommittee Meeting]
Date: Mon, 09 Aug 1999 14:49:19 -0800
From: Rynnieva Moss <Rynnieva_Moss@legis.state.ak.us>
Organization: Alaska State Legislature
To: Cec_Riordan@legis.state.ak.us

Thanks for distributing

Rynnieva

Subject: PTF Educ Subcommittee Meeting
Date: Sun, 08 Aug 1999 15:40:44 -0800
From: Karen Rehfeld <Karen_Rehfeld@eed.state.ak.us>
To: Rynnieva_Moss@legis.state.ak.us

Rynnieva: Attached are four documents for the Privatization Task Force Education Subcommittee meeting scheduled for Monday, August 9, from noon - 2:00 PM. I apologize for the delay in getting these materials to you. I am serving on grand jury and was called in for two days last week!
Attached are:

1. filename: contracted services.doc - a listing of programs that have been privatized, contracted or transferred
2. filename: TLS Summary PTF.doc - narrative from the FY2000 budget request for the Teaching and Learning Support Budget Request Unit (BRU) and each component within the BRU - describes the programs within each budget component.
3. filename: Exec Admin Summary PTF.doc - narrative from the FY2000 budget request for the Exec Admin BRU and School Finance BRU that were combined into a single BRU - describes the programs within each of those budget components.
4. filename - chli58state and municipal privatization.doc - a bibliography from the State Library - they are in the process of updating this information and are available to you for research or assistance.

I hope you are able to forward this on to the committee members prior to the meeting. I will call in the same bridge number as last time, 1-800-368-8772, at noon unless I hear from you. Barbara Thompson, Deputy Director of Teaching & Learning Support will be with me. Thanks! KJR

 <u>contracted services.doc</u>	Name: contracted services.doc Type: Winword File (application/msword) Encoding: base64 Download Status: Not downloaded with message
 <u>TLS Summary PTF.doc</u>	Name: TLS Summary PTF.doc Type: Winword File (application/msword) Encoding: base64 Download Status: Not downloaded with message

 <u>Exec Admin Summary PTF.doc</u>	Name: Exec Admin Summary PTF.doc Type: Winword File (application/msword) Encoding: base64 Download Status: Not downloaded with message
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 <u>chli58STATE AND MUNICIPAL PRIVATIZATION.doc</u>	Name: chli58STATE AND MUNICIPAL PRIVATIZATION.doc Type: Winword File (application/msword) Encoding: base64 Download Status: Not downloaded with message
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PLEASE NOTE! My email address will be changing on July 1, 1999 to
firstname_lastname@eed.state.ak.us and the website will now be
<http://www.eed.state.ak.us>.

*Karen J. Rehfeld, Director
Education Support Services
Alaska Department of Education & Early Development*

*ph# (907) 465-8650
fax# (907) 465-3452*

**Commission on Privatization & Delivery of Government Services
Education Subcommittee**

***Department of Education & Early Development
Contracted/Privatized/Transferred Services***

During the teleconference meeting on Friday, July 30, 1999, Jim Hickel, Chairman of the Education Subcommittee, asked for a listing of programs in the Department of Education and Early Development that have already been privatized. Following is a listing of programs by division

Mt. Edgecumbe High School

Dormitory Management – includes custodial services for residences and provides supervision and care in our dormitories for approximately 300 high school students during the school year - 24 hours/day - 7 days/week. Contractors work along side of State employees to make sure that students are safe, secure, and supported while attending MEHS. They employ approximately 15 employees to fulfill these duties.

Food Services - provides all meals for MEHS students during the school year (3 meals/day - 7 days/week). The contractor employs a staff of approximately six employees, plus support from the main office, which includes a registered nutrition specialist.

Custodial Services – performs janitorial services in the academic building, field house, and activities center at MEHS. The contractor employs approximately 2 or 3 employees to complete their duties.

Alaska Vocational Technical Center

Overflow student housing – utilizing local hotels

Libraries, Archives, and Museums

Records storage services – private contractor in Anchorage and Juneau

State Film Library - it was determined that it was no longer necessary to maintain a central film repository as schools and libraries develop their own collections. Alaskan films of historical significance were sent to the UAF Rasmusson Library. Educational films went to the Fairbanks North Star Borough School District which agreed to circulate them for a fee for as long as they were current. Some children's films were sent to public libraries.

Health Sciences Library - A fee structure was developed by working with an advisory group of health care providers, doctors, nurses, and hospitals. Once that program was in place, it was transferred to the University of Alaska library as it also supports the Health related curricula at the University. This is a good example of public/private cooperation. Alaska's health care community isn't large enough to support a good medical library, but combined with the University both private and academic needs are met.

Budget Request Unit: Teaching and Learning Support

Manager: Barbara Thompson, Deputy Director

Tel: (907) 465-8727 Fax: (907) 465-3396 E-mail: Barbara_Thompson@eed.state.ak.us

BRU Mission

The Division of Teaching and Learning Support has the primary responsibility for implementing educational goals related to teaching and learning in our K-12 public school system. Carrying out the state's Quality Schools Initiative is key to the work in this division (student standards and standards-based assessments, school standards, professional standards, and parent and family involvement in student learning).

This division provides professional development, resources for direct instruction, and assessment mechanisms for determining school accountability - all for the goal of increased student achievement. The division focus is on providing safe, healthy and high quality instruction for all students so they will be able to meet high academic standards that will prepare them for life-long learning and work.

The division continues to be primarily funded with federal funds (approximately 94%). Federal grant funds are leveraged to support state initiatives, but in some cases, this is not possible. State general funds are required by the federal government to match federal funds in several program areas. The loss of these matching funds and/or reductions in the state's maintenance of effort would result in the loss of significant federal receipts that currently provide direct instructional services to children, youth and adult learners across the state.

BRU Services Provided

The Division of Teaching and Learning Support provides the following services:

- Provides leadership and coordination in the development of student, school and professional standards and assessments
- Provides assistance to parents, families and schools to achieve greater involvement in students' education
- Administers statewide testing and assessment
- Provides ongoing and daily technical assistance to grantees related to increased student achievement and educational improvement
- Issues and administers grants, contracts and Reimbursable Services Agreements for the provision of direct student instruction and professional development
- Administers the Teacher Certification, Preschool Certification, Community Schools, Schools for the Handicapped, Alaska Career Information System, Kotzebue Technical Center Operations Grant, and Child Nutrition meal reimbursement programs.

BRU Goals and Strategies for FY2000

Develop, field test and finalize the High School Graduation Qualifying Exam and Benchmark Assessments to measure student achievement.

Provide professional development activities and technical assistance to all school districts.

Create a system of teacher licensure that results in an adequate supply of qualified educators for Alaska's Schools.

Develop a system of school accountability resulting in school performance designations.

Key BRU Issues for FY1999 – 2000

Completion of the High School Graduation Qualifying Exam, Benchmark Assessments in grades 3, 5, and 8, and the Developmental Profile, for incoming kindergarten or first grade students. Setting passing scores for these assessments will also need to occur during this period of time.

By fall of 1999, all schools will be using Developmental Profile materials to assess incoming students in the areas of: physical/health; language development; social/emotional; and thinking, which includes mathematical and problem solving.

By fall of 1999, the department will be reviewing the results of the pilot testing of the High School Graduation Qualifying Exam and Benchmark Assessments. These assessments will be finalized for use in spring of 2000.

In spring of 2000, the High School Graduation Qualifying Exam and the three Benchmark Assessments will be given for the first time. Tenth grade students will be given the Qualifying Exam and will know in what areas they are proficient or not.

The department will also work with school districts and the public in creating a system of school accountability, which will result in school performance designations in 2002.

During FY1999-2000, the department will provide professional development and technical assistance to school districts to help them better prepare students to meet state standards and pass the state assessments.

The department will work with the public to address a teacher licensure system, in which candidates demonstrate that they meet professional standards at increasingly higher levels.

The department will also need to address the increasing demand for qualified educators that has exceeded supply. As standards for educators are increasing, so are the shortages for qualified personnel.

Implementation of the federal Individuals with Disabilities Education Act (IDEA), related to special education, will be a key issue in FY1999-2000. Issues surrounding the IDEA legislation include, but are not limited to, the following: adequate funding to implement all provisions of the IDEA; new student discipline provisions; teacher training; and parent training.

Major BRU Accomplishments for FY1998

Began work on the development of the High School Graduation Qualifying Exam with CTB McGraw Hill. The test will be pilot tested in FY1999.

Began major development of standards in reading, writing and mathematics, through a statewide committee process. Standards were completed in FY1999.

Provided professional development to Alaska educators that was standards based.

Provided resources to school districts to assist in professional evaluation.

Component: Special and Supplemental Services

Component Mission

To provide resources to school districts to ensure that special populations of students meet the state's high educational standards.

Component Services Provided

Special Education - Maintain compliance with state and federal laws governing students with disabilities, through technical assistance to school districts, distribution of grant funding, development of pre-service and in-service training programs, complaint investigation, mediation, due process hearings, and compliance reviews. These activities are almost entirely federally funded and represent more than 95% of the salaries of 4 full-time positions in special education.

Preschool Handicapped - Provide funding to school districts for special education services to disabled preschool children ages 3 to 5 years.

Gifted and Talented - Provide statewide coordination and technical assistance for school district gifted and talented programs.

Title I, Part A Disadvantaged - Provide funding to school districts to implement supplemental assistance programs or school-wide reforms designed to improve student performance in schools with the highest concentrations of low income families; provide resources for improvement to schools failing to meet state standards and for rewarding schools that exceed those standards; provide resources for activities that will increase parent involvement and improve the quality of instruction.

Title I, Part B Even Start - Provide funding on a competitive basis for school districts to develop, in partnership with community-based organizations, family centered education programs that build on existing resources. These programs create a new range of services and assist low income children and adults achieve high standards.

Title I, Part C Migrant Education - Provide funding to school districts to implement supplemental assistance programs or school-wide reforms that will assist migratory children in meeting high standards; provide resources for coordination activities, parent involvement, staff development and support services to migrant children and families.

Title I, Part D Neglected/Delinquent/At-Risk - Provide funding to state-operated institutions to implement institution-wide services; improve the quality of instruction; provide coordination and transition services that will enable such children to succeed; provide funding to school districts with the highest local concentrations of delinquent youth to develop cooperative service agreements with correctional institutions and alternative program agencies for instructional improvement, coordination activities, drop-out prevention services, vocational education and support services.

Title 1, Part E Comprehensive School Reform Demonstration - Provide funding for research based educational strategies aimed at increasing students' achievement levels.

Adult Basic Education - Provide basic skills instruction, General Educational Development (GED) instruction and testing, English as a Second Language (ESL), life skills, and instruction related to securing and maintaining employment. These services are provided to adults, 16 years or older, who are not enrolled in a secondary school and who are most in need of services. Adult instruction improves students' basic skills, skills necessary for becoming employed, skills needed for further training or education, and skills for becoming productive and self-sufficient citizens.

Title VII, Bilingual - Provide technical assistance to school districts applying for, and receiving, Title VII federal funds.

Homeless Children and Youth - Provide technical assistance and grant funding to school districts and other educational service providers to better identify and serve homeless children and youth.

Title IV, Drug and Violence Prevention - Provide resources, technical assistance and grant assistance to school districts to develop comprehensive alcohol and drug abuse prevention and intervention programs.

Governor's Drug Prevention - Provide grants to local schools and communities for prevention programs.

Counseling - Provide funding for staff development, training and programmatic activities related to healthy life skills, suicide prevention, and at-risk students.

HIV Prevention - Provide technical and financial support for school districts to develop HIV/AIDS prevention curriculum, obtain classroom materials, receive teacher training, conduct assessments, and develop local policies and procedures related to HIV/AIDS Education.

Component Goals and Strategies for FY2000

* Provide resources for educational services for children and adults who are disadvantaged, from low income families, migratory, limited English proficient or who have English as their Second Language, neglected, delinquent, at-risk of dropping out, drop-outs, homeless, at-risk with health related issues, and bilingual to meet the same high educational standards established for all Alaskans.

* Provide resources for quality professional development and teacher training to approximately 2,000 teachers and administrators in the areas of Special Education, Even Start, Neglected & Delinquent, Preschool Handicapped, Title I, Migrant Education, Adult Basic Education, Bilingual, Homeless, Drug and Violence Prevention, Governor's Drug Prevention, Counseling, and HIV Prevention to help them assist their students in meeting the state's high academic standards.

* Monitor for compliance and ensure accountability, as required by state and federal law, and provide technical assistance to school district and other educational organizations' staff within each program area.

Key Component Issues for FY1999 – 2000

Providing professional development and technical assistance to school districts to help them better prepare students to meet state standards and pass the state assessments.

Implementing the federal Individuals with Disabilities Education Act (IDEA), requirements for special education.

Developing a unified plan of service for Adult Basic Education programs in conjunction with the Alaska Human Resources Investment Council.

Major Component Accomplishments for FY1998

* Provided resources for standards-based professional development for Alaska educators.

* Developed standards in the areas of reading, writing and mathematics, which will be assessed through the High School Graduation Qualifying Exam and the three Benchmark Assessments.

Statutory and Regulatory Authority

AS 14.30.400-410
AS 14.30.180-350
4 AAC 06.500-570
4 AAC 35.010-090
4 AAC Chapter 52
4 AAC 52.010-990

4 AAC Chapter 39
PL 91-230, as amended
PL 100-97
PL 105-17
4 AAC 06.500-570

Component: Quality Schools

Component Mission

To improve student achievement through standards and assessment, professional development, and school accountability.

Component Services Provided

The programs, projects and activities within this component are closely aligned with the four Alaska State Quality Schools Initiatives (QSI): High academic student standards and student assessment, quality professional standards, family involvement in student learning, and school excellence standards. Educational technology support is integrated throughout the QSI. The Quality Schools Component focuses on services and achievement for all students.

Vocational Education - provides resources to school districts to prepare students for employment through the development of occupational skills, integrating vocational and academic education, addressing the vocational educational needs of special populations, and providing education and training that allows students to compete in the world of work in a modern, technology based economy.

Title VI Innovative Programs - provides resources to school districts for school improvement and innovation.

School to Work - provides resources to school districts to develop a system that prepares students to make the transition from school to employment with the skills and attitudes necessary to succeed. This system is built through local/regional collaborative efforts involving school, community, and business partnerships.

Title III Technology - provides resources to school districts to update existing technology and integrate the use of technology in instruction.

Charter Schools - provides resources for the development of Charter Schools in Alaska.

Statewide Testing and Assessment - provides for statewide testing and assessment for students in all school districts, demonstrates accountability, and results in accurate measurements of student success.

Goals 2000 - provides resources for coordinated school improvement activities and staff training, which vary from district to district, based on a district-wide improvement plan.

Title II Eisenhower Professional Development - provides professional development, training, and/or re-training for district instructors and staff primarily in the areas of math and science.

Curriculum Frameworks Development - provides for the development of curriculum frameworks documents corresponding to the 10 content area standards. Frameworks documents are resources for teachers to use to help instruct students to achieve high standards in all 10 areas (math, science, English/language arts, geography, government and civics, skills for a healthy life, world languages, technology, history, and arts).

School Accreditation - assists schools with the school accreditation process, works closely with the Northwest Accreditation Association, and assists in developing school accreditation standards.

Component Goals and Strategies for FY2000

Develop and field test a statewide comprehensive student assessment system including: the High School Graduation qualifying Exam (HSGQE), three benchmark assessments at grades 3, 5 and 8, that are aligned to state performance standards to measure student achievement and the California Achievement Test-5th Edition (CAT5).

Provide technical assistance and professional development to all school districts on ways to implement the Alaska Quality Schools Initiatives, including ways for students to meet high academic standards through on-site visits, workshops and conference sessions.

Develop a system of school accountability resulting in school performance designations.

Key Component Issues for FY1999 – 2000

The development and completion of the High School Graduation Qualifying Exam, Benchmark Assessments in grades 3, 5, and 8, and the Developmental Profile, for incoming kindergarten or first grade students. Setting passing scores for these assessments will also need to occur during this period of time.

By fall of 1999, all schools will be using Developmental Profile materials to assess incoming students in the areas of: physical/health; language development; social/emotional; and thinking, which includes mathematical and problem solving. Providing professional development related to the Profile will need to occur.

By fall of 1999, the department will be reviewing the results of the pilot testing of the High School Graduation Qualifying Exam and Benchmark Assessments. These assessments will be finalized for use in spring of 2000.

In spring of 2000, the High School Graduation Qualifying Exam and the three Benchmark Assessments will be given for the first time. Tenth grade students will be given the Qualifying Exam and will know in what areas they are proficient or not.

The department will work with the school districts and the public in creating a system of school accountability, which will result in school performance designations in 2002.

During FY1999-2000, the department will provide professional development and technical assistance to school districts to help them better prepare students to meet state standards and pass the state assessments.

The department will implement new federal requirements for vocational education which focus on curriculum integration to increase all students' performance.

Major Component Accomplishments for FY1998

Began work on the development of the High School Graduation Qualifying Exam with CTB McGraw Hill. The test will be pilot tested in FY1999.

Began major development of standards in reading, writing and mathematics, through a statewide committee process. Standards were completed in FY1999.

Statutory and Regulatory Authority

4 AAC 51.100-390
PL 103-279
4 AAC 06.500-770
PL 101-589
AS 14.35.010-030
AS 14.30.360-370
4 AAC 32.010-030
PL 100-297
AS 14.07.020-170
4 AAC 06.075
4 AAC 06.075
34 CFR 208, 235, 298, 86
PL 101-392

4 AAC 60.010-180
4 AAC 05.080
44, 77
4 AAC Chapter 39
4 AAC 19.010-060
PL 102-325

Component: Education Special Projects

Component Mission

To provide resources for educational and support services to targeted students, teachers, and adults through specialized grant programs and activities.

Component Services Provided

- The Teen Parenting/High School Completion Program, funded with interagency receipts from the Department of Health and Social Services, Division of Public Assistance, consists of competitively awarded grants to school districts, for a three year period, and provides activities such as basic academic instruction, parenting, health and fitness, life skills, career assessment and employability plans.
- Alaska Minerals and Energy Resources Education Fund provides educational materials and training for teachers to use in their classrooms.
- Robert Byrd Student Scholarships provide funding for students to further their educational goals.
- Law Related Education provides materials for use in classrooms across the state.
- Senate Youth Scholarships - two students, who hold student government offices, are selected annually, through a competitive, statewide process, to receive a monetary scholarship and to participate in an on-site visit of the nation's capital.
- Christa McAuliffe teacher training grant program provides one award annually for a teacher to complete a special education-related project.

Component Goals and Strategies for FY2000

Provide educational and support services to school age parents to complete their high school education, gain positive parenting skills, employability and occupational skills training and health education (currently Mat-Su, Kenai, and Fairbanks).

Major Component Accomplishments for FY1998

Teen Parenting/High School Completion programs targeted pregnant and parenting teens, receiving public assistance, to stay in school and complete their high school education. These programs allowed nearly 200 students the opportunity to stay in school and work toward a high school diploma.

Statutory and Regulatory Authority

34 CFR Part 654
PL 101-517
PL 102-325

Component: Teacher Certification

Component Mission

1. To ensure that only qualified applicants are awarded credentials to teach in Alaska.
2. To ensure that teacher education programs in Alaska conform to nationally recognized standards.

Component Services Provided

Receive, review, analyze, and evaluate all applications for initial, renewal, addition and removal of credentials and endorsements for the teaching profession as required by regulation and AS.14.20.370. Issue, deny, and/or notify applicant of the determination regarding their credentials. Submit fingerprint cards to the Department of Public Safety and FBI for background checks on all initial applicants. Notify applicants and monitor any resubmitted fingerprint cards. Revoke/deny credentials for applicants that have a criminal disclosure. Exchange revocation information with the National Clearinghouse for teacher licensure records. Issue Alaska credentials to all eligible applicants for teacher, administrator, special service, and limited license specialty areas. Review and approve all Alaska teacher education training programs in institutions of higher education. Register K-12 private & religious schools that operate in Alaska. Monitor the status of obligors to Child Support Enforcement and Postsecondary Education.

Component Goals and Strategies for FY2000

1. Teacher Certification
 - a) Issue regular, provisional or temporary credentials or letters of academic eligibility within 90 days of receipt of application to all eligible applicants for teacher, administrator, special services and the limited certificates.
 - b) Administer the background check as set forth in AS 12.62.035(e) and identify applicants with criminal convictions which make applicants ineligible for Alaska licensure; deny or revoke licenses accordingly.
 - c) Identify and evaluate applicants that apply for but do not meet requirements for licensure; deny licenses accordingly.
 - d) Maintain records received from the national clearing house on revocations. Notify the clearing house of all revocations in Alaska.
 - e) Review and approve/disapprove non academic credit for renewal of teacher licenses.
2. Teacher Evaluation
 - a) Review and recommend to the State Board of Education approval of teacher and administrator education programs at institutions of higher education in Alaska.
 - b) Issue student teacher authorizations.

Key Component Issues for FY1999 – 2000

- * Creating a system of teacher licensure that results in an adequate supply of qualified educators.
- * Implementing testing requirements for applicants
- * Maintaining an adequate level of services to applicants within the limitations of the budget, which is based on being self-supporting from certification receipts.

Major Component Accomplishments for FY1998

- A fee increase was implemented, allowing the unit to become self supporting.
- Began work on teacher exam required by AS 14.20.020(i).
- Developed policy to accept endorsements for posted doctorate, master, major or minor in a content area.
- Coordinated with University of Alaska Endorsement Review Center to accept endorsements.
- Require clearance of security verification and fingerprint cards prior to issuance of certificate.

Statutory and Regulatory Authority

AS 12.62.035(e)
4 AAC 12.010 - .900
AS 14.20.010 - .040

Component: Child Nutrition Administration

Component Mission

To provide resources to support federal child nutrition program sponsors in Alaska.

Component Services Provided

The Child Nutrition Program administers the National School Lunch, School Breakfast, Special Milk, Summer Food, Child and Adult Care Food, and Nutrition Education and Training Programs in Alaska for USDA. The component distributes federal funds, training and resources to eligible schools, child care centers, licensed family day care homes, residential child care institutions, summer camps, homeless shelters, adult day care centers, and national youth sports programs that provide food for children in Alaska in accordance with AS 14.50.010. The federal funds for grant reimbursements administered by this component are included in the K-12 Support BRU, Child Nutrition Component.

Component Goals and Strategies for FY2000

To meet the federal requirement that 25% of the school programs and 33% of the child care sponsors be reviewed annually and to provide on-site technical assistance in specific targeted areas.

To implement training priorities for state agency staff and local sponsors to support program improvement; i.e., implementation of the dietary guidelines, expansion of nutrition education, promoting program visibility.

To increase by 5% the number of agencies participating in child nutrition programs with emphasis on increasing the school breakfast, special milk, and adult day care programs.

To increase by 5% the number of children receiving nutrition education.

To provide staff training to at least 50% of the program sponsors annually.

Key Component Issues for FY1999 – 2000

Recently re-authorized federal legislation now allows for the state to target and fund snacks for in-school/after-school youth programs. This program will be fully implemented in FY2000.

The new re-authorized federal legislation creates a new food program targeting homeless children. Guidance from the U. S. D. A. has not yet been provided. The department will be fully implemented in FY2000.

Major Component Accomplishments for FY1998

- * The Summer Food Program, targets low-income out of school youth, expanded to include more sponsors. Additionally, a higher Alaska reimbursement rate was secured for sponsors.
- * 47 school districts participated in school lunch programs serving 94,098 students on an average daily basis.
- * 27 school districts participating in school breakfast programs serving 16,374 students on an average daily basis.

Statutory and Regulatory Authority

AS 14.50.010

Budget Request Unit: Executive Administration

Manager: Karen J. Rehfeld, Director

Tel: (907) 465-8650 **Fax:** (907) 465-3452 **E-mail:** Karen_Rehfeld@eed.state.ak.us

BRU Mission

To lead and support the development of responsible, economically viable, lifelong learners and citizens.

BRU Services Provided

This BRU provides leadership and support to divisions and programs within the Department of Education.

BRU Goals and Strategies for FY2000

Goal 1: To have clear, rigorous, credible standards and assessments.

- School districts adopt reading, writing and math performance standards and align curriculum to ensure all students have the opportunity to learn the basics.
- Develop a standards-based comprehensive system of student assessments that generates useful data for educators to teach students to read, write and compute.
- Developmental profile for each child in kindergarten and first grade
- Alaska Benchmark Examinations in grades, 3, 6 and 8
- Alaska High School Graduation Qualifying Examination
- School districts identify students in jeopardy of not meeting reading, writing and math standards and provide appropriate student interventions.

Goal 2: To have a credible system of academic and fiscal accountability for students, professionals, schools and districts.

- Issue Quality Schools Grants so schools and communities can determine local solutions to student learning such as summer school, individual tutoring, lower class size, special classes, before and after school programs.
- Identify schools that are distinguished, successful, in decline or in crisis based on student performance and other measures.
- Provide distinguished educators and district support teams to those districts that are in decline or in crisis, when requested by the district.
- Recognize and celebrate distinguished schools.
- Schools in decline and in crisis develop a school improvement plan with community involvement using the Alaska Quality Schools Standards as the basis for the plan.
- Partner with the Northwest Association of Schools and Colleges to incorporate the Alaska Quality Schools Standards to accredit Alaska schools.
- Encourage local school boards to adopt culturally responsive school standards.

Goal 3: To have highly qualified school professionals who have met rigorous and credible standards and assessments.

- Provide rigorous educator standards by which school districts will evaluate professionals.
- Require school districts to develop individual professional development plans based on standards and best practices.
- Provide funding for national board certification leading to an Alaska advanced teacher certificate.
- Develop and administer a standards-based licensure system for educators.
- Develop a teacher approval process so that all teacher education programs meet high, rigorous standards.
- Encourage local school boards to adopt culturally responsive educator standards.

Goal 4: To have schools in which students, staff, families and communities are active partners in learning.

- In partnership with NEA, AASB, and PTA, promote research-based family involvement models and community orientations.

- Promote and support school-based Family Involvement Centers (1-877-FOR-KIDS).
- Launch a Statewide Reading Initiative focusing on K-3.
- Encourage and support business and school partnerships through the School-to-Work Initiative and Employability Standards.

Goal 5: To have an adequate and secure source of funding for schools.

- Secure adequate funding to develop and maintain an accountable system of high quality public schools.
- Secure adequate level of funding to meet school district's school construction and major maintenance needs.

Key BRU Issues for FY1999 – 2000

A key issue for the Department of Education will be to develop student intervention programs for students at risk of not meeting standards in reading, writing and mathematics. Student achievement needs to be measured against rigorous standards in reading, writing and mathematics at appropriate age levels. If a student is not making adequate progress, swift and intensive intervention is needed to get the student back on track.

As part of the Quality Schools Initiative, each school will be required to do a number of things aimed at increasing the quality of public education. Beginning in FY2000, each school will chart a developmental profile for each child upon entering kindergarten or first grade. The profile will identify a student's strengths and areas needing additional attention to help in designing an instructional program for each child.

Schools also need to adopt state-mandated academic standards in reading, writing and math. Schools will need to test each child early and often in these subjects throughout their school careers to make sure they are on target to meet the standards. Schools will be required to test students at the 3rd, 6th, and 8th grades. If they are falling behind, schools will have to provide special help to children so they can catch up. The final part of the comprehensive student assessment system is the High School Graduation Qualifying Examination. Today's ninth grade students will be required to pass this exam in order to receive a high school diploma.

This comprehensive student assessment system based on rigorous, academic standards will give the state and communities solid information to hold schools and communities accountable for the academic achievement of children. Each year, all schools will have to report certain information to their communities and state about their progress.

The Department of Education will use this information to build a system of accountability that will tell us whether each school is successful or unsuccessful. DOE will develop school based intervention plans to assist school in improving. The state will require low performing schools to work with their community to build a school improvement plan aimed at helping the school and the students reach the standards.

Major BRU Accomplishments for FY1998

- * Completed second phase of multi-year project to develop statewide assessment tools for measuring student performance against established state education standards. This phase will focus on developing performance-based assessment in reading and math, and the first statewide direct assessment of writing.
- * Developed regulations that establish accreditation standards for Alaska's schools based on research on successful schools and a field test in selected districts.
- * Developed regulations for a revised teacher administrator licensure system based upon national and state standards for educators.
- * Integrated the use of technology to facilitate delivery of services and education programs.

Component: State Board of Education

Component Mission

To provide leadership to ensure that all Alaska children will become successful adults and our democratic society will thrive and prosper.

Component Services Provided

This component provides the funding for transportation and meeting costs for the State Board of Education and a support position to coordinate board activities, meeting notices, and preparation for additional board meetings. The State Board provides policy direction to the department and is responsible for adopting regulations necessary to implement statutory requirements.

Component Goals and Strategies for FY2000

1. To provide a public forum to communicate and exchange information about education in the state.
2. To fulfill statutory requirements relating to board direction, policy, and action in support of:
 - * Clear, rigorous, credible standards and assessments.
 - * A credible system of academic and fiscal accountability for students, professionals, schools and districts.
 - * Highly qualified school professionals who have met rigorous and credible standards and assessments.
 - * Schools in which students, staff, families and communities are active partners in learning.

Key Component Issues for FY1999 – 2000

A key issue for the Department of Education will be to develop student intervention programs for students at risk of not meeting standards in reading, writing and mathematics. Student achievement needs to be measured against rigorous standards in reading, writing and mathematics at appropriate age levels. If a student is not making adequate progress, swift and intensive intervention is needed to get the student back on track.

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- * Developed regulations for a revised teacher administrator licensure system based upon national and state standards for educators.
- * Integrated the use of technology to facilitate delivery of services and education programs.

Statutory and Regulatory Authority

Article III Section 26 of the State Constitution
AS Title 14 Education
4 AAC

Component: Commissioner's Office

Component Mission

To lead and support the development of responsible, economically viable, lifelong learners and citizens.

Component Services Provided

The Commissioner provides leadership and support to all aspects of Alaska's education system by effectively and efficiently managing department programs to facilitate and enhance delivery of educational services. The Commissioner implements the policies and regulations adopted by the State Board of Education, and promotes collaboration among schools, students, families and communities to improve learning.

Component Goals and Strategies for FY2000

Goal 1: To have clear, rigorous, credible standards and assessments.

- School districts adopt reading, writing and math performance standards and align curriculum to ensure all students have the opportunity to learn the basics.
- Develop a standards-based comprehensive system of student assessments that generates useful data for educators to teach students to read, write and compute.
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- Alaska High School Graduation Qualifying Examination
- School districts identify students in jeopardy of not meeting reading, writing and math standards and provide appropriate student interventions.

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- Identify schools that are distinguished, successful, in decline or in crisis based on student performance and other measures.
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- Encourage local school boards to adopt culturally responsive school standards.

Goal 3: To have highly qualified school professionals who have met rigorous and credible standards and assessments.

- Provide rigorous educator standards by which school districts will evaluate professionals.
- Require school districts to develop individual professional development plans based on standards and best practices.
- Provide funding for national board certification leading to an Alaska advanced teacher certificate.
- Develop and administer a standards-based licensure system for educators.
- Develop a teacher approval process so that all teacher education programs meet high, rigorous standards.
- Encourage local school boards to adopt culturally responsive educator standards.

Goal 4: To have schools in which students, staff, families and communities are active partners in learning.

- In partnership with NEA, AASB, and PTA, promote research-based family involvement models and community orientations.
- Promote and support school-based Family Involvement Centers (1-877-FOR-KIDS).
- Launch a Statewide Reading Initiative focusing on K-3.
- Encourage and support business and school partnerships through the School-to-Work Initiative and Employability Standards.

Goal 5: To have an adequate and secure source of funding for schools.

- Secure adequate funding to develop and maintain an accountable system of high quality public schools.
- Secure adequate level of funding to meet school district's school construction and major maintenance needs.

Key Component Issues for FY1999 – 2000

A key issue for the Department of Education will be to develop student intervention programs for students at risk of not meeting standards in reading, writing and mathematics. Student achievement needs to be measured against rigorous standards in reading, writing and mathematics at appropriate age levels. If a student is not making adequate progress, swift and intensive intervention is needed to get the student back on track.

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The Department of Education will use this information to build a system of accountability that will tell us whether each school is successful or unsuccessful. DOE will develop school based intervention plans to assist school in improving. The state will require low performing schools to work with their community to build a school improvement plan aimed at helping the school and the students reach the standards.

Major Component Accomplishments for FY1998

- * Completed second phase of multi-year project to develop statewide assessment tools for measuring student performance against established state education standards. This phase will focus on developing performance-based assessment in reading and math, and the first statewide direct assessment of writing.
- * Developed regulations that establish accreditation standards for Alaska's schools based on research on successful schools and a field test in selected districts.
- * Developed regulations for a revised teacher administrator licensure system based upon national and state standards for educators.
- * Integrated the use of technology to facilitate delivery of services and education programs.

Statutory and Regulatory Authority

Article III Section 26 of the State Constitution
AS Title 14 - Education

Component: Administrative Services

Component Mission

To provide centralized management and financial support services.

Component Services Provided

This component provides services to the department in payroll, personnel, training, budget preparation and implementation, federal and state reporting, accounting, procurement and contracting services. The Finance and Accounting Unit processes budget transactions, revised programs, payments, grant awards, RSA's and certification of transactions input at the central or decentralized offices. The Supply and Procurement Unit processes mail, makes deliveries, processes delivery orders, provides bidding and procurement for supplies, professional services contracts and requests for quotations and proposals, reconciles invoices to deliverables prior to payment and is responsible for the department's inventory and lease contact. The Human Resources Unit provides support for all payroll and personnel activities for the department. This unit provides collective bargaining services, ADA guidance, and employee training.

Component Goals and Strategies for FY2000

1. Timely and accurate financial management services
 - * Budget preparation and implementation
 - * Revenue collection
 - * Federal and state reporting
 - * Process and certify payments
 - * Grant awards
 - * Reimbursable services agreements
2. Timely and accurate personnel/payroll services
 - * Payroll
 - * Recruitment
 - * Training
3. Purchasing and procurement services within state and federal requirements
 - * Purchasing of supplies
 - * Contracting for professional services
 - * Inventory and leasing
 - * Mail services

Key Component Issues for FY1999 – 2000

Continuing to improve service delivery in support of department programs.

Major Component Accomplishments for FY1998

- * Maintained timely and accurate financial management services
- * Conducted quarterly division staff/training meetings
- * Provided professional level procurement services
- * Maintained high level of timely and accurate payroll services
- * Provided training opportunities for managers, supervisors and employees
- * Developed performance standards and measures for employees

Statutory and Regulatory Authority

4 AAC 27	AS Title 39
AS Title 14	AS 28.05.104
AS Title 23	
AS Title 37	

Component: Information Services

Component Mission

To facilitate delivery of all departmental programs by providing information technology support services.

Component Services Provided

This component provides services to the department in data processing and state reporting. It provides overall support for the data processing functions on the department's AS/400, Local Area Network (LAN), and PC levels. The component has oversight responsibilities for education data collection and reporting. Existing education data criteria are maintained as well as new data requests developed and reviewed. Data requested from school districts are coordinated by this unit.

Component Goals and Strategies for FY2000

1. Reliable, efficient computing resources.
2. Computer literate workforce.
3. Improve electronic communications via E-mail and Internet access.
4. Streamline electronic data collection activities.

Key Component Issues for FY1999 – 2000

Key issues for this component include Y2K software and hardware inventory and replacement, and continuing to improve computing resources and computer literacy of workforce to enhance service delivery.

Major Component Accomplishments for FY1998

1. Provided high level data processing support including:
improved electronic communications via E-mail and Internet access
maintained department standard hardware and software.
2. Applied uniform departmental standards for the collection and analysis of data collected by the Department of Education.

Statutory and Regulatory Authority

AS 14.03.030	AS 14.45.100-200	34CFR 74-76, 78, 80, 85
AS 14.03.040	AS 14.07.010-030.170	34CFR 200-201
AS 14.03.120	4 AAC 06.160	
AS 14.30.350	4 AAC 06.700-770	

Budget Request Unit: School Finance

BRU Mission

To provide financial and technical support for the operation of Alaska's public schools.

BRU Services Provided

The School Finance BRU applies for and distributes state and federal funds to school districts in support of public education. The Foundation Program provides the primary financial support to the 53 school districts, Mt. Edgecumbe and Alyeska Central School for K-12 education. Supplementary program funds such as boarding home, tuition, and pupil transportation serve to provide student access to comparable educational opportunity.

Through the collection, analysis and compilation of timely, uniform educational program and finance data, the division monitors fiscal accountability of school districts in the utilization of local, state and federal resources. Fiscal and non-fiscal data collection and analysis support reporting requirements to the US Department of Education, its sub-contractors and other federal agencies in order to assure continued access to federal funds and compliance with program requirements. Audit coordination, review and monitoring provide further accountability of funds, standardization of financial reporting and assurances of compliance with grant objectives and direct pass through funds.

The BRU provides statewide oversight for educational facilities renovation and construction and evaluates and ranks bond reimbursement and capital project grant requests. The BRU also has the responsibility for administering the Donated Commodities program.

BRU Goals and Strategies for FY2000

- * To provide a credible system of fiscal accountability for schools.
- * To provide an adequate and secure source of funding for schools.
- * To provide an adequate level of funding to meet school district's school construction and major maintenance needs.
- * To provide timely and accurate payments to school districts.
- * To provide technical assistance to school districts.
- * To improve the quality and consistency of reported data.

Key BRU Issues for FY1999 – 2000

In 1998, legislation passed that significantly changed public education in Alaska. The new law requires that schools be held accountable for student performance through a comprehensive student assessment system. The law also changed the way the funding is allocated to public schools and provided additional resources to support school districts in implementing standards based curriculum and assessments.

The new school funding law changed the funding formula from an instructional unit basis to an adjusted student basis. The first year of funding, FY99, was a transitional year to the new formula. In FY2000, the requested funding level is based on the full funding estimate under the new formula. Additional resources are also included to implement the provisions if the law relating to fiscal accountability, monitoring and updating cost factors, and providing specific reports to the legislature.

Major BRU Accomplishments for FY1998

- * Updated regulations governing school district chart of accounts to improve the quality and consistency of reported data.
- * Updated regulations governing reimbursement of pupil transportation costs.
- * Began implementation of new school funding law.

Component: District Support Services

Component Mission

To provide efficient and effective distribution of, and accounting for, resources utilized in the operation of public schools throughout the state and to provide quality technical assistance and training to the 53 school districts, Mt. Edgecumbe Boarding School, and Alyeska Central School.

Component Services Provided

District Support Services manages the distribution of public school foundation, tuition, boarding home, youth in detention, pupil transportation, cigarette tax, USDA donated commodities, and impact aid program funds through the collection, analysis and aggregation of educational program support data. Staff provide technical assistance to the field level through telephone, on-site and scheduled group training and manage over \$700 million in state programs for less than one tenth of one percent. Staff comply with the federal Common Core of Data collection and reporting activities, which enables the state to participate in federal education funding programs. The audit section monitors grantees (sub-recipients) for compliance with federal and state laws regarding the use of public funds distributed by the department and requires corrective action when instances of noncompliance are identified. AS 28.05.104 provides for twice annual safety and mechanical inspections of all public school buses. AS 14.07.020 provides for pre-service training of public school bus drivers. AS 14.09.025 provides for development of an alcohol and drug testing program for public school transportation providers.

Component Goals and Strategies for FY2000

- * To provide management support for the formula programs under K-12 Support and Donated Commodities.
- * To provide technical assistance to school districts related to state statutes and regulations.
- * To provide for mechanical and safety inspections of approximately 1,000 school buses twice annually.
- * To provide for the safe transportation of students through school bus driver training and drug and alcohol testing for school bus drivers.
- * To provide timely and accurate payments to school districts.
- * To improve the quality and consistency of reported data.

Key Component Issues for FY1999 – 2000

In 1998, legislation passed that significantly changed public education in Alaska. The new law requires that schools be held accountable for student performance through a comprehensive student assessment system. The law also changed the way the funding is allocated to public schools and provided additional resources to support school districts in implementing standards based curriculum and assessments.

The new school funding law changed the funding formula from an instructional unit basis to an adjusted student basis. The first year of funding, FY99, was a transitional year to the new formula. In FY2000, the requested funding level is based on the full funding estimate under the new formula. Additional resources are also included to implement the provisions if the law relating to fiscal accountability, monitoring and updating cost factors, and providing specific reports to the legislature.

Major Component Accomplishments for FY1998

- * Updated regulations governing school district chart of accounts to improve the quality and consistency of reported data.
- * Updated regulations governing reimbursement of pupil transportation costs.
- * Began implementation of new school funding law.

Statutory and Regulatory Authority

AS 14.07.020-030
AS 14.50
4 AAC 40
AS 14.07.060
4 AAC 09
4 AAC 51
AS 14.09 4 AAC 27
4 AAC 52.700
AS 14.11 4 AAC 31
AS 14.17 4 AAC 33

Component: Educational Facilities Support

Component Mission

To provide services that promote safe facilities which support a quality education program.

Component Services Provided

This component provides oversight for the statewide school construction program. The unit develops the annual public school CIP budget for the Governor and the Legislature, calculates the state share of debt retirement, administers the school construction grant program, and provides assistance to school districts and other agencies upon request.

The primary responsibility of the component is to provide service and technical assistance to local school districts, the Governor, the Legislature and the public regarding school construction issues and projects statewide. This includes: 1) evaluation of annual capital improvement grant applications submitted by the school districts according to the criteria established by Chapter 83, SLA 93, 2) on site review of selected facilities, 3) development of the department's annual CIP budget request for the State Board of Education, the Governor and the Legislature, 4) technical assistance in preparation of six year plans, 5) development of criteria and methods of construction, project analysis, evaluation, and approval/disapproval, 6) review of educational specifications and documentation of code compliance, 7) calculation of the state's share of debt retirement, payments for reimbursement of bond indebtedness and local revenue projects approved by the department, 8) calculation and payment of CIP grants, 9) research and development of proposals for more effective ways of financing school construction, 10) review of district match documentation for cash or local in-kind contributions, calculation of payment upon approval of documentation, and 11) prioritization of debt retirement projects.

Component Goals and Strategies for FY2000

- 1) Payment of all reimbursement requests within 30 days of receipt.
- 2) To provide additional enhancements to the method of project evaluation and publish evaluation criteria to school districts, prior to April 1.
- 3) To provide the Governor's Office a copy of the CIP list by November 1 as per statute.
- 4) To provide school districts with a copy of the CIP list by November 5 as per statute.
- 4) To provide the Legislature a copy of the CIP list during the first ten days of the session as per statute.
- 5) To provide statewide debt service projections during the first ten days of the session.
- 6) To secure an adequate level of funding to meet school districts school construction and major maintenance needs.

Key Component Issues for FY1999 – 2000

Continuing issues include:

- * improving the annual ranking process for capital project and bond reimbursement requests.
- * developing school construction standards.
- * securing a long-term stable source of funding for school construction and major maintenance projects.

Major Component Accomplishments for FY1998

- * Completed annual CIP prioritized list in accordance with statute.
- * Provided training to school districts on CIP application and evaluation process.
- * Provided timely payments to school districts.

Statutory and Regulatory Authority

AS 14.03.140 - .150
AS 14.07.020(11)
AS 14.07.030(4)
AS 14.07.030(6)
AS 14.08.111
AS 14.08.151
AS 14.11
AS 14.11.011
AS 14.14.065
AS 14.14.090
AS 37.15.11
AS 37.16
AS 43.50.140
4 AAC 31

Component: Donated Commodities

Component Mission

To provide USDA commodities to school districts, child care centers, nutrition programs for the elderly, soup kitchens, summer food service programs as well as charitable and correctional institutions.

Component Services Provided

Conduct on-site reviews of recipient agencies participating in the commodity program as required by federal regulations. Attend technical assistance workshops and conferences pertaining to the commodity program. Provide workshops to recipients. Provide transportation company with directions for distribution of commodities statewide. Provide school districts with an opportunity to purchase commodity processed foods to help reduce their meal costs.

Component Goals and Strategies for FY2000

- * Increase commodity processing on behalf of school districts in order to reduce food service expenditures.
- * Order and distribute USDA food products economically and efficiently.
- * Provide technical assistance workshops for program participants.
- * Hold state food distribution advisory council meetings

Key Component Issues for FY1999 – 2000

Continuing to provide USDA commodities to schools and other agencies in an efficient, cost-effective manner and improving the quality of commodities available for distribution.

Major Component Accomplishments for FY1998

- * Distributed \$1,354,801 in USDA commodities to 45 school districts statewide.
- * Provided commodities training and technical assistance to 20 school districts.
- * Approximately 50% of Alaska School Districts took advantage of Commodity Processing during FY98, which enabled districts to save money for their food programs by obtaining products that normally are purchased through distributors.

Statutory and Regulatory Authority

7CFR250

Current

Topics . . .



STATE AND MUNICIPAL PRIVATIZATION (Update)

No. 58
11/96

Copies of the following titles may be requested from the State Library by placing a check mark next to the title(s) needed and returning the list to the Library, **MS 0571**. In compiling this list, our research staff has collected other materials and bibliographies which you may also find useful. Every effort has been made to select current, pertinent articles on the subject. If you wish to locate additional materials or need research assistance, please contact LuAnn Fisher at 465-2944 or FAX 465-2665.

1. ___ Fryklund, Inge. **Privatization American Style.** *Business Forum*, v. 19, no. 1-2, p. 4, Winter/Spring 1994.

"Many of the failures of American privatization result from public managers proceeding under the misapprehension that they are denationalizing a service when they are really outsourcing it."

2. ___ Wessel, Robert H. **Privatization in the United States.** *Business Economics*, v. 30, no. 4, p. 45, October 1995.

"Privatization offers attractive business opportunities, but it should be justified on the grounds of efficiency and productivity rather than become a fad to solve business and governmental problems."

3. ___ Silverstein, Kenneth. **Federal Regs Fight Privatization Trend.** *American City & Country*, v. 111, no. 6, p. 12, May 1996.

Federal regulations often block efforts to privatize state and local services. These regulations can limit the cost effectiveness of privatizing local services or apply more regulations to privately owned companies that provide those services.

4. ___ Greene, Jeffrey D. **Cities and Privatization: Examining the Effect of Fiscal Stress, Location, and Wealth in Medium-Sized Cities.** *Policy Studies Journal*, v. 24, no. 1, p. 135, Spring 1996.

Examines the reasons why some medium-sized cities choose to use privatization in their "management portfolios" and why some do not.

5. ___ Hass, Nancy. **Psst, Wanna Buy a Bridge?** *Financial World*, v. 162, no. 16, p. 30, August 3, 1993.

"The new willingness to sell off government assets has been hastened by the cities' and states' forays into the privatization of services. While governments are only now exploring asset sales, they have embraced the outsourcing of a wide range of municipal functions for nearly a decade."

6. __ Barak-Erez, Daphne. **A State Action Doctrine For an Age of Privatization.** *Syracuse Law Review*, v. 45, no. 4, p. 1169, 1995.

"This article is aimed to shed light on another dimension of the subject, the constitutional angle, concentrating on the possible influence of privatization on the constitutional standards applied in the operation of important social services."

7. __ Lighthizer, O. James. **The Pros & Cons of Privatization.** *State Government News*, v. 37, no. 2, p. 27, February 1994.

Uses the example of the Maryland State Department of Transportation to show that "privatization makes sense when the private sector can do a job substantially better and cheaper than state government, but does not make sense when there would be risk to the vitality of an economic asset."

8. __ Hellbusch, Ron and Andy Mead. **Same Service, New System.** *Public Works*, v. 126, no. 10, p. 72, September 1995.

The emphasis is on "Alternative Service Delivery", not only privatization, in this explanation of how the Dept. of Public Works in the City of Westminster, Colorado addressed the effective use of public funds to provide efficient service.

9. __ Kodrzycki, Yolanda K. **Privatization of Local Public Services: Lessons for New England.** *New England Economic Review*, p. 31, May/June 1994.

"The limited scope of privatization by New England local governments in particular defies explanation, suggesting that communities in the region may wish to reexamine their choices of how to provide services, if they have not done so recently."

10. __ Hirsch, Werner Z. **Factors Important in Local Governments' Privatization Decisions.** *Urban Affairs Review*, v. 31, no. 2, p. 226, November 1995.

"In this article, the author builds a model of local governments' decisions to contract out residential solid waste disposal services and empirically tests this model by using a new dependent variable—proportion of expenditures on a service that goes to expenses other than payroll."

11. __ Grønbjerg, Kirsten A., et al. **Child Welfare Contracting: Market Forces and Leverage.** *Social Service Review*, v. 69, no. 4, p. 583, December 1995.

Examines "patterns of privatization in the Illinois child welfare system using data from state payment records and a survey of organizational providers."

12. __ Sherman, Rexford B. **Privatization of Seaports?** *Transportation Quarterly*, v. 49, no. 3, p. 93, Summer 1995.

A discussion of the differences between privatization of seaports that has taken place in countries worldwide, and the possible effects of seaport privatization in the United States.

13. __ Semmens, John. **Privatizing Vehicle Registrations, Driver's Licenses and Auto Insurance.** *Transportation Quarterly*, v. 49, no. 4, p. 125, Fall 1995.

Proposes a model by which the state of Arizona could privatize all of the functions of the Motor Vehicles Department.

14. __ Mehdi, Haririan and Thomas A. Bonomo. **Privatization and the Emergence of For-Profit Prisons.** *Central State Business Review*, v. 15, no. 1, p. 11, Winter 1996.

Regional socio-economic factors, specifically unionization rates and wages of correctional employees, play a significant role in the location and success of for-profit prisons.

15. __ Russo, Charles J. and J. John Harris. **Buyer Beware: State Controls over Privatization.** *School Business Affairs*, v. 62, no. 5, p. 17, May 1996.

"Begins by briefly examining background issues on privatization along with reviewing arguments regarding its adoption. The second section notes the virtual lack of governmental controls and regulation of privatization. The final portion raises lingering legal questions that remain in the apparently head-long rush to privatization."

NAME:

AGENCY:

MAIL STOP:

Alaska State Library
P.O. Box 110571
Juneau, AK 99811-0571
465-2920
asl@eed.state.ak.us

rynnieva_moss@legis, 10:43 AM 9/30/99, CIP information

To: rynniva_moss@legis.state.ak.us
From: Karen Rehfeld <Karen_Rehfeld@eed.state.ak.us>
Subject: CIP information
Cc:
Bcc:
Attached:

Hi Rynniva: I am putting some material in the mail to you today (too much to fax) regarding the CIP space guidelines that were requested during the meeting on Monday. Also, the committee may want to take a look at the information on our web site, www.eed.state.ak.us Lots of information including the CIP application and instructions and several publications that are referenced in the application and in state regulations. I hope this is helpfull KJR

Rynniva:

Attached:

1. FY2001 CIP Application
2. FY2001 Instructions
3. 4 AAC 31.020 Guides for Planning Educational Facilities

Karen

Alaska Department of Education

FY2001

Instructions for completing the Application for Funding for a Capital Improvement Project

*Use these instructions with Alaska Department of Education AKDOE Form #05-95-017 -
Application for Funding by Capital Improvement Project Grant or State Aid for Debt Retirement.
Numbered paragraphs below correspond to numbered questions on the application.*

Unless otherwise indicated, each question on the application form must be answered in order for the application to be considered complete. Only complete applications will be accepted. Incomplete applications will be returned, un-ranked. The project name on the first page of the application should be consistent with project titles approved by the district school board and submitted with the six-year Capital Improvement Plan (CIP). Please submit *one original and three complete copies* of each application and *two copies of each attachment*.

TYPE OF PROJECT AND FUNDING REQUEST

1. Check one box to indicate which type of state aid is being requested.
- 2a. Check one box to indicate the primary purpose of the project. Each application should be for a single project for a particular facility, and should be independently justified. The district may include work in other categories in a proposed project. These projects will be reviewed and evaluated as mixed-scope projects. Refer to Appendix B of these instructions for descriptions of categories and the limitations associated with category C and category D projects. Application of scoring criteria will be on a weighted basis for mixed scope projects.
- b. Check the applicable phase(s) covered by this funding request. Refer to Appendix A for descriptions of phases.

BASIC ELIGIBILITY REQUIREMENTS

3. Attach a six-year Capital Improvement Plan (CIP) for the district.
4. AS 14.11.011(b)(1) and 4 AAC 31.011(b)(1) require each school district to send the Department of Education a description of its fixed asset inventory annually as part of its audited financial statement. The district should respond with two items:
 - a) A description of a functional fixed asset inventory system. (i.e. one that can be audited and is in compliance with state statutes and regulation), and;
 - b) A copy of the audit page(s) from the district's audited financial statement that refers to the fixed asset inventory system. The department will review these pages to verify the existence of a functional fixed asset system and the current condition of that system.

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5. The department may not award a school construction grant to a district that does not have replacement cost property insurance. AS 14.03.150, AS 14.11.011(b)(2) and 4 AAC 31.200 set forth property insurance requirements. Note that revisions to 4 AAC 31.200 regarding flood insurance, took effect July 1, 1997.
6. AS 14.11.011(b)(1) and 4 AAC 31.011(b)(2) require each school district to include with this application a description of its preventive maintenance program, as defined by AS 14.11.011(b)(4), and AS 14.14.090(10). *Preventive maintenance* means scheduled maintenance actions that prevent the premature failure or extend the useful life of a facility or a facility's systems and components. A *functioning and effective* preventive maintenance program is cost-effective on a life cycle basis.

Refer to Appendix D for detail, and attach a statement that describes the preventive maintenance program and provides evidence that the program addresses the full spectrum of building systems (i.e.: more than routine or custodial maintenance). Include examples of how the program is effective and achieving results.

7. AS 14.11.011(b)(3) requires a district to provide evidence that the funding request is for a capital project and not part of a preventive maintenance or regular custodial care program. Refer to Appendix D for an explanation of maintenance activities and please include complete information in your statement. The plan should address all of the elements specified in the revision to AS 14.11.011 (b)(4).

DISTRICT INFORMATION

8. To calculate the *five-year average replacement value* of all school facilities district-wide, add together the auditable insurance valuation of all facilities for each of the past five years and divide the sum by five. Value of school contents and replacement costs related to teacher housing should be excluded from this figure.
9. To calculate the *average annual district-wide maintenance expenditure for the last five years*, total all expenses for district maintenance and operations over the last five years; subtract expenditures for communications, insurance, utilities, energy, and teacher housing (if applicable) during the last 5 years; and divide the remaining sum by 5.

EXISTING FACILITIES

10. The response to this question should be consistent with the space utilization table in question 28. Projects that will result in demolition or surplus of existing state-owned or state-leased facilities should include a detailed plan for transition from existing facilities to replacement facilities. If a facility is to be surplus or demolished and was previously owned by the state, the project must provide for the abatement of all hazardous materials as part of the project. The transition plan should describe how surplus state-owned or state-leased facilities will be secured and maintained during transition. Facilities owned by REAA's that were previously owned by the State must

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include abatement of all hazardous material as part of a plan to abandon or surplus a facility. This shall also apply to facilities currently owned by the state.

11. This question requests information on the year the facility was constructed and size of each element of the facility. *Year built* refers to the year the original facility and any additions were completed or were first occupied for educational purposes. If a date of construction is not available, use an estimate indicated by an (*). *Gross square footage (GSF)* of each addition should be the amount of space added to the original facility. *Total size* should equal the total square footage of the existing facility.

RELATED FUNDING

12. Prior state funding refers to funds appropriated to the Department and administered under AS 14.11 only. If a grant has not been issued, but funds have been appropriated to the department for a project, please list the SIA, Chapter, Page and Line of the appropriation's reference. Any amounts noted here should also be included in Table 1 of the Cost Estimate, Question #20. No other fund sources apply.
13. Waivers of participating share should be in accordance with AS 14.11.008(d). Justification should be documented. See Appendix E in the attachments to these instructions for detailed information.

PROJECT INFORMATION

14. The district ranking of each project application must be a unique number approved by the district school board and must place each discrete project in priority sequence. The project having the highest priority should receive a ranking of one, and each additional project application of lower priority should be assigned a unique number in priority order. The department will accept only one project with a district ranking of priority one. The ranking of each application should be consistent with the board-approved six-year Capital Improvement Plan (CIP). Please refer to AS 14.11.013(b)(2). Both major maintenance projects and school construction projects should be combined into a single six-year plan.
15. If this project (1) will result in renovated or additional educational space, and (2) will serve students of the same grade levels currently housed or projected to be housed in other schools, the project description should indicate:
- the funding communities that will be impacted (i.e. will contribute students) by this project,
 - the current and projected student populations in each facility (school) affected by the project, and
 - the square footage for each affected facility (school) in the funding community.

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Note: for schools housing a combination of elementary and secondary grades, the space allocated to elementary (K-6) and secondary (7-12) may be necessary.

16. Refer to AS 14.11.013(b)(1). If this project is an emergency, the project description shall describe:

- the nature of the emergency,
- the facility condition related to the emergency,
- the threat to students and staff,
- the consequence of continued utilization of the facility,
- the individuals or groups affected by the condition,
- what action the district has taken to mitigate the emergency conditions, and
- the extent to which any portion of the project is eligible for insurance reimbursement or emergency funding from any state or federal agency.

Evaluation of the emergency will consider all of the information submitted and the responses to each of the emergency elements noted in these instructions.

17. *Acquisition of additional land* refers to expansion of an existing school site using property immediately adjacent to, or in close proximity to, the existing school site. Land acquisition may result from long term lease, purchase, or donation of land. *Utilization of a new school site* refers to use of a site previously acquired by the district, or a new site acquired as a result of this application and not previously utilized as a public school. If the project site is not yet known, the site description should be the district's best estimate of specific site requirements for the project, and it should be included in the project description. The department's 1997 publication, *Site Selection Criteria and Evaluation Handbook*, may be useful in responding to this question. A site selection study is required for those projects involving new sites in order to qualify for planning points (reference Appendix A).
18. A *facility condition survey* is a technical survey of facilities and buildings, using the department's Guide for School Facility Condition Survey or a similar format, for the purpose of determining compliance with established building codes and standards for safety, maintenance, repair, and operation. Portions of the condition survey, such as that information pertaining to building codes and analysis of structural and engineered systems, should be completed by someone with training equivalent to that of an architect or an engineer. Other portions that document conditions of building elements may be completed by someone reasonably familiar with the building and its various components. A facility condition survey is optional for FY2001, however, a facility condition survey document is useful to the department in evaluating the overall merits of the project request. Currency of the survey should be addressed. It is doubtful that a survey four or more years old adequately describes current facility conditions.

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PROJECT DESCRIPTION/SCOPE OF WORK

19. The project description/scope of work should include (1) a detailed description of the project, (2) documentation of the conditions justifying the project, (3) a description of the scope of the project and what the project will accomplish and (4) information or detail related to the project's cost. The scope should also contain sufficient quantifiable analysis to show the project is in the best interest of both the district and the state. The project description/scope of work is a good place to include responses to questions 7, 10, 15, 16, and 17, where applicable.

Question #7: Statute requires the district to provide sufficient evidence that the project is not preventive maintenance, routine maintenance, or custodial care. Refer to Appendix D of these instructions for information regarding the definitions of maintenance terms related to this question.

Question #10: When a new, renovation, new-in-lieu-of-renewal, or Category B project is proposed, the project description shall include a detailed cost/benefit analysis and a life cycle cost analysis. These documents shall provide data documenting conditions that justify the project [AS 14.11.011(b)(1)]. If these documents are attached, they can be referenced rather than reproduced in the project description. The detailed plan for demolishing or surplusizing state-owned or leased properties, should incorporate a draft of the department's Form 05-96-007, Excess Building listing building data and general information; signatures and board resolutions would not be necessary for the CIP process.

Question #16: If the project is an emergency, the description shall address all the items specified in the instructions for question 16.

Question #17: Site description should include location, size, availability, cost and other pertinent information as appropriate. If a site selection and evaluation report is attached, the information can be referenced with a brief summary rather than being reproduced in this section.

Questions #18: If a facility condition survey is attached, it can be referenced rather than reproduced in the descriptions of project need, justification, and scope.

Cost Estimate Support: The project description shall include sufficient information to support meaningful evaluation of the project cost and the reasonableness of the cost estimate. Though basic cost information is to be incorporated into Tables 1 and 2 of question 20, many cost elements reported in standard estimates will require further explanation or support. This is especially true for lump-sum elements used in the department's cost model in sitework and utilities. The project description and cost estimate should be increasingly detailed as project phases advance.

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The description of project scope should include information that will allow the department to evaluate the criteria specified in AS 14.11.013. Please refer to Appendix C for guidelines covering project cost estimate percentages for factored cost items.

Operational Cost vs. Project Cost: Information (and evaluation points) related to operational costs is not limited to Category E projects. The project cost and its impact on operational costs is an important consideration for any project. The project description should include a discussion of ways in which the completion of the project would reduce current operational costs. Considerations could cover energy costs, costs related to wear-and-tear and maintenance of existing facilities and costs incurred by current functional inadequacies at the facility and funding community level. For new facilities, consideration should be given to design choices that will provide periodic and long-term savings in the operation and maintenance of the facility.

Although the addition of square footage is certain to increase overall operational costs, project descriptions for this category of project should include information on methods and strategies used to minimize operational costs over the life of the building. This can include cost benefit analyses that were accomplished on building systems and materials, etc.

COST ESTIMATES

20. For all applications, including those for planning and/or design, cost estimates should be based on the district's most recent information and should address the project being requested. Refer to Appendix C for descriptions of elements of the total project cost. The cost estimate should be of sufficient detail that its reasonableness can be evaluated. If a project is projected to cost significantly more than would be predicted by the Department's Program Demand Cost Model (8th Edition), provide attachments justifying the higher cost. If there are special requirements, a detailed explanation and justification should be provided in the project description/scope of work.

In Table 1, all prior AS 14.11 funding for this project should be listed by category and totaled in Column I. If a grant has not been issued, but an appropriation has been made, use the appropriated amount plus participating share in lieu of the issued grant or bond amount. Column II should list the amount of funding being requested in this application, by category and in total. Column III should show a percentage breakdown for the total project's allocated costs. Column IV should list the total project cost estimate from inception to completion, all phases. Calculate each cost category percentage based on construction cost equal to 100%, excluding the cost of land and site investigation. Other categories should be within the ranges listed. Construction Management (CM) must be broken down into two sub-categories: "consultant" and "in-house". CM costs associated with each should be reported. DOE overhead is in the Indirect/Administration category. The percent for art, required for all renovation and construction projects, is given a separate line. Project Contingency is now fixed at 5%, rather than applying the previous range of 3%-5%. The project total cost should still not exceed 130% of construction cost, excluding land and site investigation. If your

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project exceeds the recommended overall guideline, please add a detailed justification for each category that exceeds the specific sub-category guidelines.

Table 2, which summarizes construction costs, is structured to be consistent with the DOE cost model. Other estimating formats may not provide an exact correlation, however, the following categories must be reported to allow adequate comparisons between projects: basic building, site work and utilities, general requirements, contingency and escalation.

Include as an attachment any additional information regarding project cost that may aid in evaluating the reasonableness of the cost estimate (including life cycle cost analysis and cost benefit analysis).

FUNDING COMMUNITY AND AVERAGE DAILY MEMBERSHIP (ADM)

NOTE: DOE square footage entries in this section should reflect the measurements specified by 4 AAC 31.020, excluding exterior wall thickness and applying the 25% factor for outdoor covered spaces and mechanical penthouses. The department realizes that this is not the conventional definition of gross square footage.

21. Any additional square footage that is funded for construction or approved by local voters for construction, should be described, showing student capacity, additional DOE square feet, and grade levels to be served. Include these projects in any capacity/unhoused calculations provided in the year of anticipated occupancy.
22. DOE square footage and ADM should reflect all schools in the funding community that serve elementary or secondary students of equivalent grade level to the students who will be served by the proposed project. If the project includes any grades K-6, *equivalent grade level* means all schools within the funding community serving elementary students, regardless of the specific grades served by each of the elementary schools. Similarly, if the project includes any grades 7-12, *equivalent grade level* means all schools within the funding community serving secondary students. Do not include the enrollment or DOE square footage of students in grade levels (i.e. K-6 or 7-12 groupings) other than those served by this discrete project. (ADM) should be based on the most recent Foundation count date used for funding by each district. For most districts this will be the October Foundation count from the prior year. If a project is proposed to serve multiple funding communities, the population of schools affected in each individual community should be provided. Please attach pages if necessary.

Provide ADM projections by school. Projections by grade for each funding community are usable, however, they are slightly less favorable to the district for space computations. For mixed grade schools, provide ADM by grade as well as by school.

23. The total number of unhoused students currently within the funding community should be based on the (ADM) and DOE square footage (DOE SF) responses to question 22 and the Department of Education Space Guidelines. *Unhoused students* are students

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who exceed the capacity of the facility. *Capacity* equals the DOE square footage divided by the allowable square footage per student, based on the Department of Education Space Guidelines. In your attachment, provide the DOE square footage, population, and capacity calculation for each school in the funding community serving grades affected by the proposed project.

24. The date provided here should be the anticipated date the facility will be occupied. This will be the starting point for looking at five-year post-occupancy population projections. If a project schedule is available it should be provided to substantiate the projected date.
25. The ADM projection provided should cover each of the requested years that cover the period from project start to 5 years after it is first occupied, by grade, for the grade levels to be served by this project request.
26. The response to this question should reflect the grade levels that will be served by the facility at the completion of the project. If project completion will result in changes in the grade levels offered in existing facilities, those changes in grade levels served must be approved by the Commissioner of Education, as described in 4 AAC 09.005(d). Requests for changes in grade levels offered must be submitted under separate cover to the Commissioner, and a copy should be attached to this application.
27. If the demographic model utilized by the district produces a significant difference from that represented by averaging the annual percent change in reported ADM over the past five-years, please justify the variance in the attached calculations. If a simple, straight-line projection is being utilized, years that show large increases or declines should be explained, or should not be used in calculating the projected population.

PROJECT SPACE EQUATION

28. This table summarizes space utilization in the proposed project expressed in gross square feet. Space figures represented should tabulate to match the gross building square footages reported in question 11 as well as those shown in Table 2 of the cost estimate section. The worksheet at Appendix F lists types of school space that fit in each category. This table does NOT use DOE square feet.

ALTERNATIVE FACILITIES AND OPTIONS

29. Statutes require an evaluation of other facilities in the area that may serve as an alternative to accomplishing the project as submitted. Information regarding the availability of such facilities and the effort (i.e. cost, time, etc.) required to make the facility usable for the school needs represented by the project should be provided. The area is not restricted to the attendance area or funding community served by the project.
30. In an effort to support the project, as submitted, as the best possible solution to school facility needs, districts should consider a full range of options during planning and project development. Options should respond to the specific scope of the project. (i.e. if

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a project proposes a new school, what options were considered in lieu of building the new space; renovation, alternate facilities?) If the project proposes a roof replacement, what options were considered; patching, new roofing, types of roofing, insulation, new roof pitch?) as well as project delivery (i.e. could the project be phased, etc.). If the proposed project would add new or additional space, districts must consider attendance area boundary changes and any space available in adjacent funding communities that are connected by road and to which students may be transported within the 120-minute daily limitation, per 4 AAC 27.045(b). At least one of the options considered and rejected must be an evaluation of potential boundary changes. Scoring in this area will be related to factors such as: the range of options, the rigor of comparison, the viability of options considered, and the quality of data supporting the analysis of the option. Options also need to consider the results of cost benefit analysis, life cycle cost analysis, and value analysis.

ATTACHMENTS

31. The attachments checklist is provided for your convenience. Please check to see that your application is complete.

CERTIFICATION

32. Please be sure the application is signed by the appropriate official. Unsigned applications cannot be accepted for ranking. If the application is to be signed by a chief school administrator, provide school board minutes authorizing the administrator to execute contracts and to oversee capital project submittals.

Application packages should be submitted to:

Alaska Department of Education
Education Support Services, Facilities
801 W. 10th Street, Suite 200
Juneau, AK 99801

For further information contact:

Michael Morgan, School Facilities Manager
(907) 465-1858

Alaska Department of Education
APPENDIX A: CAPITAL IMPROVEMENT PROJECT PHASES
Adopted by the Bond Reimbursement & Grant Review Committee
April 18, 1997

The application form requires designation of the phase(s) for which the district requests funding. Below is a basic scope of effort for each phase. Items marked **Required** are mandatory (where project type dictates) in order for projects to receive planning, schematic design and/or design development points. Required documents must be or must have been submitted and received by the department by September 1st.

PHASE I-PLANNING

1. Select consultants (if needed)(4 AAC 31.065) - **(Required)**
2. Prepare a school facility appraisal (as required)
3. Prepare a facility condition survey (as required)
4. Identify need category of project - **(Required)**
5. Verify student populations and trends - **(Required)**
6. Complete education specifications (design the educational program - 4AAC 31.010) - **(Required)**
7. Identify site requirements and potential sites - **(Required)**
8. Complete concept design studies and planning cost estimate - **(Required)**

PHASE IIA - SCHEMATIC DESIGN

1. Perform site evaluation to determine suitability (4AAC 31.025) **(Required)**
2. Prepare plan for transition from old site to new site, if applicable - **(Required)**
3. Accomplish site survey and perform preliminary site investigation (topography, geotechnical)
4. Obtain option on site - **(Required)**
5. Complete schematic design documents including dimensioned site plans, floor plans, elevations and engineering narratives for all necessary disciplines - **(Required)**
6. Complete preliminary cost estimate appropriate to the phase - **(Required)**.

PHASE IIB-DESIGN DEVELOPMENT

1. Complete suggested elements of planning/design not finished in the previous phases - **(Required)**
2. Review and confirm planning (4AAC 31.030)
3. Accomplish a condition survey relevant to scope - **(Required if project includes renovation)**
4. Obtain purchase or lease agreement for site - **(Required)**
5. Complete design development documents - **(Required)**
6. Prepare proposed schedule and method of construction
7. Prepare revised cost estimate appropriate to the phase - **(Required)**

PHASE III-CONSTRUCTION

1. Complete suggested elements of planning and design not previously completed - **(Required)**
2. Prepare final cost estimate
3. Complete final contract documents and legal review of construction documents (4AAC 31.040)
4. Advertising, bidding and contract award (4AAC 31.080)
5. Submit signed construction contract
6. Construct project
7. Procure furniture, fixtures and equipment, if applicable
8. Substantial completion
9. Final completion and move-in
10. Post occupancy survey
11. Obtain project audit/close out

Alaska Department of Education
APPENDIX B: CATEGORIES OF GRANTS
Adopted by the Bond Reimbursement & Grant Review Committee
April 23, 1997

AS 14.11.013(a)(1)-The department shall verify that each proposed project meets the criteria established under AS 14.11.014(b) and qualifies as a project required to accomplish one of the following. Projects can combine work in the different categories with the majority of work establishing the project's type. For the purpose of review and evaluation, projects which include significant work elements from categories other than the project's primary category will be evaluated as mixed scope projects.

- A. "Avert imminent danger or correct life threatening situations." This category is generally referred to as, "Health and Life Safety." A project classified under "A" must be documented as having unsafe conditions that threaten the physical welfare of the occupants. Examples might be that seismic design of structure is inadequate; that required fire alarm and/or suppressant systems are non-existent or inoperative; or that the structure and materials are deteriorated or damaged seriously to the extent that they pose a health/life-safety risk. The district must document what actions it has taken to temporarily mitigate a life-threatening situation.
- B. "House students who would otherwise be unhoused." This category is referred to as "Unhoused Students." A project to be classified under "B" must have inadequate space to carry out the educational program required for the present and projected student population or the existing facility must qualify for replacement-in-lieu-of-renewal. Projects will be considered for replacement-in-lieu-of-renewal when project costs exceed 70% of the current replacement cost of the existing facility, based on a twenty year life cycle cost analysis, which includes disposition costs of the existing facility. Documentation should be based on the current Department of Education Space Guidelines. (Refer to AAC 31.020)
- C. "Protection of the structure of existing school facilities." This category is intended to include projects that will protect the structure, enclosure, foundations and systems of a facility from deterioration and ensure continued use as an educational facility. Work on individual facility systems may be combined into one project. However, the work on each system must be able to be independently justified and exceed \$25,000. The category is for major projects, which are not a result of inadequate preventive, routine and/or custodial maintenance. An example could be a twenty year old roof that has been routinely patched and flood coated, but is presently cracking and leaking in numerous locations. A seven year old roof that has numerous leaks would normally only require preventive maintenance and would not qualify. In addition, no new space for unhoused students is permitted in this category, limiting its ability to be combined with other project types.
- D. "Correct building code deficiencies that require major repair or rehabilitation in order for the facility to continue to be used for the educational program." This category, Building Code Deficiencies, was previously referred to as "Code Upgrade." The key words are "major repair." A "D" project corrects major building, fire, mechanical, electrical, environmental, disability (ADA) and other conditions required by codes. Work on individual facility systems may be combined into one project. However, the work on each system must be able to be independently justified and exceed \$25,000. An example could be making all corridors one hour rated. Making one or two toilet stalls accessible would not fit this category. In addition, no new space for unhoused students is permitted in this category, limiting its ability to be combined with other project types.
- E. "Achieve an operating cost saving." This category is intended to improve the efficiency of a facility and therefore, save money. Examples that might qualify are increasing insulation, improving doors and windows, modifying boilers and heat exchange units for more energy efficiency. The district must document a cost benefit ratio less than 1, considering both capital and operating dollars.
- F. "Modify or rehabilitate facilities for purpose of improving the instructional unit."
Category "I", Improve Instructional Program, was previously referred to as "Functional Upgrade." This category is limited to changes or improvements within an existing facility such as, modifications for science programs, computer installation, conversion of space for special education classes, or increase of resource areas.
- G. "Meet an educational need not specified in (A)-(F) of this paragraph, identified by the department." Any situation not covered by (A)-(F), and mandated by the Department of Education. (Currently, there are no such mandates.)

Alaska Department of Education
APPENDIX C: PROJECT COST ESTIMATE
Adopted by the Bond Reimbursement & Grant Review Committee
February 20, 1998

Construction Management (CM) includes two categories: CM accomplished by a private contractor and CM accomplished by district/borough staff. Costs may be incurred for one or the other and in some cases both. Estimates for "in-house" construction management should include actual staff time allocated to the project, staff travel and per diem and direct costs of telephone, etc. It should include construction management costs done by staff and all on site representation. For private contractors it should include costs as anticipated to include oversight of any phase of the project and any deliverables such as educational specifications, legal and bonding assistance, facility appraisals and condition surveys. Construction management includes management of the project's scope, schedule, quality, and budget during any phase of the planning, design and construction of the facility. The maximum for construction management by consultant + 'in-house' = 5%.

Statutory Limit by Private Contractor: 2-4%

Recommended In-house: 2-5%

Land is a variable unrelated to construction cost and should include actual purchase price plus title insurance, fees and closing costs. Land costs are excluded from project percent calculations.

Site Investigation is also a variable unrelated to construction cost and should include land survey, preliminary soil testing, environmental and cultural survey costs, but not site preparation. Site investigation costs are excluded from project percent calculations.

Design Services should include full standard architectural and engineering services and extra services such as educational specifications, condition surveys, construction administration and post occupancy evaluation. Architectural and engineering fees can be budgeted based upon a percentage of construction cost. Recommended: 0-8% (Architectural and engineering fees may vary the percentage fee).

Construction includes all contract work as well as force account for facility construction, site preparation and utilities. This is the base cost upon which others are estimated and equals 100%.

Equipment/Technology includes all moveable furnishing, instructional devices or aids, electronic and mechanical equipment with associated software and peripherals (consultant services necessary to make equipment operational may also be included). It does not include installed equipment, nor consumable supplies, with the exception of the initial purchase of library books. Items purchased should meet the district definition of a fixed asset and be accounted for in an inventory control system. Equipment/Technology budgets have two benchmarks for standard funding: percentage of construction costs and per-student costs as discussed in DOE's *Guideline for School Equipment Purchases*. If special technology plans call for higher levels of funding, itemized costs should be presented in the project budget separate from standard equipment.

Recommended: 0-7% of construction cost or between \$1700 - \$3050 per student depending on school size and type.

Alaska Department of Education
APPENDIX C: PROJECT COST ESTIMATE
Adopted by the Bond Reimbursement & Grant Review Committee
February 20, 1998

Indirect/Administration includes an allocable share of district overhead costs, such as payroll, accounts payable, procurement services, and preparation of the six year capital improvement plan and specific project applications. It also includes the Department of Education overhead charges.
Recommended: 2-5%

Percent for Art includes the statutory allowance for art in public places. This may fund selection, design/fabrication and installation of works of art. One percent of the construction budget is required except for REAA projects which require only one-half of one percent. The department recommends budgeting for art.

Contingency is a safety factor to allow for unforeseen changes. Standard cost estimating by A/E or professional estimators use a built in contingency in the construction cost of $\pm 10\%$. Because that figure is included in the construction cost, this item is a project contingency for project changes and unanticipated costs in other budget areas
Recommended: 5% Fixed

Total Project Request is the total project cost, as a percent of the construction cost, except in extreme cases, should average out close to the same for all projects, and when the variables of land cost and site investigation are omitted. This item is the best overall gauge of the efficiency of the project.
Recommended: Not to exceed 130%

Note: These recommended, or guideline percentages differ from some of the averages and from some others previously suggested. They are based upon the above descriptions and are therefore more fixed and accountable.

Alaska Department of Education
APPENDIX D: DEFINITIONS OF MAINTENANCE
Adopted by the Bond Reimbursement & Grant Review Committee
April 18, 1997

Component

A part of a system in the school facility.

Component Repair or Replacement

The unscheduled repair or replacement of faulty components, materials, or products caused by factors beyond the control of maintenance personnel.

Custodial Care

The day to day and periodic cleaning, painting, and replacement of disposable supplies to maintain the facility in safe, clean and orderly condition.

Deferred Maintenance

Custodial care, routine maintenance, or preventive maintenance that is postponed for lack of funds, resources, or other reasons.

Major Maintenance

Facility renewal that requires major repair or rehabilitation to protect the structure and correct building code deficiencies, and shall exceed \$25,000 per project, per site. It must be demonstrated, using evidence acceptable to the department that (1) the district has adhered to its regular preventive, routine and/or custodial maintenance schedule for the identified project request, and (2) preventive maintenance is no longer cost effective.

Preventive Maintenance

The regularly scheduled activities that carry out the diagnostic and corrective actions necessary to prevent premature failure or maximize or extend the useful life of a facility and/or its components. It involves a planned and implemented program of inspection, servicing, testing and replacement of systems and components that is cost effective on a life-cycle basis. Programs shall contain the elements defined in AS 14.11.011(b)(4) to be eligible for funding.

Renewal or Replacement

A scheduled and anticipated systematic upgrading of a facility system or component to rehabilitate it to a renewed functioning standard.

System(s)

An assembly of components created to perform specific functions in a school facility, such as a roof system, mechanical system or electrical system.

Alaska Department of Education
APPENDIX E: WAIVER OF PARTICIPATING SHARE/IN-KIND CONTRIBUTIONS
Adopted by the Bond Reimbursement & Grant Review Committee
April 23, 1999

Current law - AS 14.11.008(d) - requires that a district provide a participating share for all school construction and major maintenance projects funded under AS 14.11. The department administers all funds for capital projects appropriated to it under the guidelines of AS 14.11 and 4 AAC 31. The following points should be considered by those districts requesting a waiver of the local participating share

1. A district has three years before and after the appropriation to fulfill the participating share requirement.

A review of the annual financial audits and school district budgets indicate that no district is in a financial condition which warrants a full waiver. Local dollars are available to fund all or a portion of the match during the six years. Districts continue to generate and budget for, local interest earnings, facility rental fees and other forms of discretionary revenue adequate to fund some or all of the required local match. If properly documented and not already funded by AS 14.11, prior expenditures for planning, design, and other eligible costs may be sufficient to meet the match requirement.

2. Both the administration and the Legislature have strong feelings that local communities should at least be partially engaged in the funding of projects.

In recognition of the inability of some communities to levy a tax or raise large amounts of cash from other sources, the legislation provides an opportunity for in-kind contributions, in-lieu of cash. All districts need to make a directed effort to provide the local match, utilize fund balances and other discretionary revenue, consider sources of in-kind contributions, document that effort and then request a full or partial waiver-as necessary.

3. All waiver requests require sufficient documentation.

Requests should be accompanied by strong, compelling evidence as to overall financial condition of the school district and in the case of a city/borough school district, the financial condition of the city/borough as well. The attachments should include, at a minimum, cash account reconciliations, balance sheets, cash investment maturity schedules, revenue projection, cash flow analysis and projected use of all fund balances and documentation in support of attempts to meet the local match. Historical expenditures do not provide sufficient evidence of future resource allocations. Consideration should be given to new and replacement equipment purchases, travel and other expenditures that support classroom activity, but may be delayed until the local match is funded. Each district has an opportunity to help itself and provide a safe, efficient school facility through shared responsibility.

4. Districts may request consideration of in-kind contributions of labor, materials or equipment.

Under regulation 4 AAC 31.023 (d) in-kind contributions are allowed. This also affords an opportunity for community participation through contributions to the art requirements for new buildings or other means. This option should be fully explored, as well as the documentation mentioned above, prior to requesting a waiver of all or part of the participating share.

**Alaska Department of Education
APPENDIX F: Type of Space Added or Improved
Adopted by the Bond Reimbursement & Grant Review Committee
April 18, 1997**

Category A - Instructional or Resource

Kindergarten
Elementary
General Use Classrooms
Secondary
Library/Media Center
Special Education
Bi-Cultural/Bilingual
Art
Science
Music/Drama
Journalism
Computer Lab/Technology Resource
Business Education
Home Economics
Gifted/Talented
Wood Shop
General Shop
Small Machine Repair Shop
Darkroom
Gym

Category B - Support Teaching

Counseling/Testing
Teacher Workroom
Teacher Offices
Educational Resource Storage
Time-out Room
Parent Resource Room

Category C - General Support

Student Commons/Lunch Room
Auditorium
Pool
Weight Room
Multipurpose Room
Boys Locker Room
Girls Locker Room
Administration
Nurse
Conference Rooms
Community Schools/PTA Administration
Kitchen/Food Service
Student Store

Category D - Supplementary

Corridors/Vestibules/Entryways
Stairs/Elevators
Mechanical/Electrical
Passageways/Chaseways
Supply Storage & Receiving Areas
Restrooms/Toilets
Custodial
Other Special Remote Location Factors
Other Building Support

Alaska Department of Education

FY2001

Application for Funding
Capital Improvement Project by Grant or State Aid for
Debt Retirement

For each funding request submit one original and three complete copies of this application
and two copies of each attachment.

School District _____ Community _____

School Name _____

Project Name _____

TYPE OF PROJECT AND FUNDING REQUEST

1. Type of funding requested (Choose only one funding source.)

☐ Grant Funding

☐ Aid for Debt Retirement (Bonding)

2a. Primary purpose of project (Choose only one category, per AS 14.11.013)

School Construction:

☐ Health and life-safety (Category A)

☐ Unhoused students (Category B)

☐ Achieve operating cost savings
(Category E)

☐ Improve instructional program
(Category F)

Major Maintenance:

☐ Protection of structure (Category C)

☐ Building code deficiencies (Category D)

b. Phases of project to be covered by this funding request (Indicate all applicable phases)

☐ Planning (Phase I)

☐ Design (Phase II)

☐ Construction (Phase III)

BASIC ELIGIBILITY REQUIREMENTS

3. Has a six-year Capital Improvement Plan (CIP) been approved by the district
school board?

☐ yes ☐ no

(Refer to AS 14.11.011(b), attach a copy of the 6-year Plan.)

4. Does the school district have a functional fixed asset inventory system?

☐ yes ☐ no

(Refer to AS 14.11.011(b)(1), attach a description of the fixed asset
inventory system and audit page(s) from the district's latest annual
audited financial statement.)

5. Is evidence of required insurance attached to this application or has
evidence been submitted as required to the department?

☐ yes ☐ no

(Refer to AS 14.11.011(b)(2) .)

6. Does the district have a functioning and effective preventive maintenance program?
(Refer to AS 14.11.011(b)(4), AS14.14.090(10) and AS14.11.011(b)(1), and attach a description of the preventive maintenance program that shows the program is both functioning and effective.)

☐ yes ☐ no

7. Is the project a capital improvement project and not part of a preventive maintenance program or custodial care?

☐ yes ☐ no

(Refer to AS 14.11.011(b)(3), and if the answer is yes, attach a statement of why this is a capital project.)

DISTRICT INFORMATION

8. What is the average replacement value of all school facilities district-wide for the last 5 years?

\$ _____

(Do not include values for teacher housing.)

9. What is the average, annual district-wide maintenance expenditure for the last 5 years?

\$ _____

(Do not include costs for teacher housing.)

EXISTING FACILITIES

10. Will the existing facility be:

☐ renovated ☐ added to ☐ demolished ☐ surplus ☐ other

(If the project will result in demolition or surplus of state-owned or state-leased facilities, attach a detailed plan for transition and protection of state-owned or state-leased properties. If the project will result in the demolition or surplus of facilities previously owned by the state provide for the abatement of all hazardous materials as part of the project.)

11. What is the size of the original existing facility and when was it constructed?

_____ yr. built _____ GSF

What is the size of each addition to the original facility and when was each addition constructed?

_____ yr. built _____ GSF

_____ yr. built _____ GSF

_____ yr. built _____ GSF

_____ yr. built _____ GSF

Total size _____ GSF

RELATED FUNDING

12. What AS 14.11 administered grants have already been appropriated or issued in support of this project?

DOE grant # _____ Phase _____ % completed _____

DOE grant # _____ Phase _____ % completed _____

(If a grant has not been issued but funds have been appropriated, list SLA, Chapter, Page and Line reference for the appropriation and use the amount)

☐ AS 14.11 grants have not been issued in support of this project.

13. Is the district applying for a waiver of participating share?

☐ yes

☐ no

(If the district is applying for a waiver, attach justification.)

PROJECT INFORMATION

14. What is the ranking of this project under the district's six-year Capital Improvement Plan?

Ranking: _____

15. Does this project impact multiple facilities?

☐ yes

☐ no

(If the answer is yes, describe in the project description and provide applicable data as identified in the instructions.)

16. Is this project an emergency?

☐ yes

☐ no

(Refer to AS 14.011.013(b)(1) and the Instructions. If the answer is yes, the project description should describe the nature of the emergency and actions the district has taken to mitigate the emergency conditions.)

17. Will this project require acquisition of additional land or utilization of a new school site?

☐ yes

☐ no

(If the answer is yes, attach site description or site requirements.)

18. Has a facility condition survey been completed?

☐ yes

☐ no

(If the answer is yes, attach 2 copies.)

19. Project Description/Scope of Work:

*(Refer to AS 14.11.011(b)(1) and to the instructions accompanying this form.
Appendices A and C accompanying the instructions may be particularly helpful.)*

COST ESTIMATES

20. Use the Department of Education's 8th edition Cost Model or an equivalent.

(Percentages are based on construction cost. See Appendix C. If your project exceeds the recommended percentages, add a detailed justification for each item exceeding the percentage. Completion of this form is mandatory for all applications.)

Table 1. TOTAL PROJECT COST ESTIMATE					
	Maximum percent w/out justification	I All prior AS 14.11 funding	II Current project Request	III Percentage of construction total	IV Project total (Incl. all prior AS 14.11 funding)
Construction Management ¹					
By Consultant	2-4%				
By District/Borough	2-5%				
Land ^{2,3}	-				
Site Investigation ^{2,3}	-				
Design Services	6-8%				
Construction ⁴	-			100%	
Equipment ^{2,4}	0-7%				
Technology ^{2,4}	-				
Indirect/Administration ⁴	2-5%				
Percent for Art ⁷	0.5 - 1%				
Project Contingency	5%				
Total Project Request					

1. Percentage is established by AS 14.11.020(c) for consultant contracts; show "in-house" management as a separate cost. Maximum combined 'in-house' + consultant = 5%.
2. Include only if necessary for completion of this project.
3. Exclude from percent calculation.
4. Attach detailed construction cost estimate and life cycle cost if new-in-lieu-of-renovation.
5. Includes Department of Education overhead and district/municipal/borough administrative costs.
6. See the department's publication, Guidelines for School Equipment Purchases for per student and percentage limitations without justification.
7. Required for all renovation and construction projects.

Table 2. CONSTRUCTION COST ESTIMATE (Enter cost and sq. ft. for each type of construction.)						
	NEW CONSTRUCTION			RENOVATION		
	cost	sq. ft.	DOE use	cost	Sq. ft.	DOE use
Base Building Construction ²						
Special requirements ¹		n/a			n/a	
Site work and utilities		n/a			n/a	
General requirements		n/a			n/a	
Geographic cost factor		n/a			n/a	
Size factor		n/a			n/a	
Construction contingency		n/a			n/a	
Escalation		n/a			n/a	
Total cost estimate						

¹ Explain in detail and justify special requirements

² If using the Cost Model, Base Construction = (1.0+2.0+3.0) otherwise, the Base Construction = the total construction cost less the costs that correspond with other cost categories in the table.

If you have classified this project as Major Maintenance (Category C or D) and you are not including any new space, please skip to question 30. If you are in doubt about the proper category of the proposed project, please fill in all the following questions.

FUNDING COMMUNITY AND AVERAGE DAILY MEMBERSHIP (ADM)

Please note: All applications requesting new (additional) space must provide the information requested in this section. For the purposes of this section, DOE SF is calculated in accordance with 4 AAC 31.020(e).

21. Within the funding community, is there any work (other than this project) that is in progress, or that has been funded or approved by local voters?

☐ yes

☐ no

(If the answer is yes, please provide information below about size, student capacity, and grades to be served.)

Project _____
DOE SF _____

Student capacity _____
Grades to be served _____

Project _____
DOE SF _____

Student capacity _____
Grades to be served _____

22. Describe the funding community covered by this project, showing GSF of schools and equivalent grade level ADM's as necessary (K-6, 7-12, and total):

K-6 DOE SF _____

ADM _____

7-12 DOE SF _____

ADM _____

Total DOE SF _____

ADM _____

23. Are there unhoused students in the funding community?

☐ yes

☐ no

(If the answer is yes, please describe unhoused students by grade level and total ADM, and attach calculations of unhoused students for each school in the funding community.)

K-6 DOE SF _____

Unhoused _____

7-12 DOE SF _____

Unhoused _____

or

K-12 DOE SF _____

Unhoused _____

Total DOE SF _____

Unhoused _____

In lieu of data in the format above for questions 22 and 23, we are providing detailed attachments.

☐ yes

☐ no

24. What is the anticipated date of occupancy for the proposed facility?

Provide a project schedule, if available.

25. Please provide the ADM projection, in the table below, for the funding community:

School Year	K-6 ADM	7-12 ADM	Total ADM
1999-2000			
2000-2001			
2001-2002			
2002-2003			
2003-2004			
2004-2005			
2005-2006			
2006-2007			
2007-2008			

26. Please indicate grade levels of students to be housed by or served in the facility proposed in this project: _____ (Please attach grade change request, if applicable.)

27. By what method(s) were ADM projections calculated? _____
(Please attach copies of calculations, and justification for variance, if applicable.)

PROJECT SPACE EQUATION

28. Completion of this table is mandatory for all projects that add space or change existing space utilization. It is required for all construction (Phase III) projects, Category B (unhoused students) projects, or renovation projects. Use gross square feet, not DOE square feet. Once all applicable square footage has been entered in columns A, I, II, III, and IV, project totals (column V) and equations can be calculated as follows:

$$\text{Column I} + \text{II} + \text{III} = \text{V} \quad \text{also} \quad \text{Columns I} + \text{II} + \text{IV} = \text{A}$$

Table 3. PROJECT SPACE EQUATION						
A		I	II	III	IV	V
All existing space	Space utilization	To remain "as-is"	To be renovated	New or additional space	To be abandoned/demolished (-)	Total space When project is complete
	Elementary Instructional/Resource					
	Secondary Instructional/Resource					
	Support teaching spaces					
	General Support					
	Base sq. ft. total					
	Supplementary space					
	Total sq. ft.					

ALTERNATIVE FACILITIES AND OPTIONS

29. List below any alternative regional, community, and school facilities in the area that are capable of housing students.

(Refer to AS 14.11.013(b)(4) and attach additional pages if necessary.)

30. Describe two or more viable options to this project that have been considered.

(Refer to AS 14.11.013(b)(6) and attach additional pages if necessary)

ATTACHMENTS

31. Please check to indicate all items that are attached to this application and note that two copies of each attachment should be included. Attachments designated as Required must be included for the application to be considered complete. Some items may not be applicable to specific projects.

- ☐ Six-year Capital Improvement Plan (CIP) (question 3); Required for eligibility
- ☐ Description of fixed asset inventory system (question 4); Required for eligibility
- ☐ Audit of fixed asset inventory system (question 4)
- ☐ Description of preventive maintenance program (question 6)
- ☐ Transition plan for state-owned or state-leased properties (question 10)
- ☐ Justification for waiver of participating share (question 12)
- ☐ Evidence that project is a capital project and not preventive maintenance (question 15); Required for eligibility
- ☐ Site description or site requirements (question 17)
- ☐ Facility condition survey (question 18)
- ☐ Project description/scope of work (question 19); Required for eligibility
- ☐ Cost/benefit analysis (questions 19, 20, 30)
- ☐ Life cycle cost analysis (questions 19, 20, 30)
- ☐ Value analysis provided (question 19, 20, 30)
- ☐ Budget variance justification (question 20)
- ☐ Cost estimate worksheets (question 20)
- ☐ Unhoused student calculations by school (question 23)
- ☐ Two-year and five-year enrollment projections, with calculations (question 25)
- ☐ Request for change in grade levels offered (question 26)
- ☐ Justification for variance in enrollment calculations (question 27)
- ☐ Description of alternative facilities (question 29)
- ☐ Description of other options (question 30)
- ☐ Appropriate compliance reports (i.e., Fire Marshal, AHERA, ADA, etc.)
- ☐ Superintendent's signature certifying the application (question 32); Required for eligibility. If signed by Chief School Administrator, provided school board minutes authorizing.
- ☐ (other) _____
- ☐ _____
- ☐ _____

CERTIFICATION

32. I hereby certify that this information is true and correct to the best of my knowledge, and that the application has been prepared under the direction of the district school board and is submitted in accordance with law.

Superintendent or Chief School Administrator

Date

4 AAC 31.020

GUIDES FOR PLANNING EDUCATIONAL FACILITIES.

- (a) The following are the basic guides for educational facility planning:
- (1) for a school capital project application submitted to the department
 - (A) before January 1, 1996, The Guide for Planning Educational Facilities, as published by the Council of Educational Facilities Planners, International, 1982 Edition (Revised); and
 - (B) on or after January 1, 1996, The Guide for Planning Educational Facilities, as published by the Council of Educational Facilities Planners, International, 1991 Edition (Revised);
 - (2) repealed 4/17/98;
 - (3) repealed 4/17/98;
 - (4) Guidelines for School Equipment Purchases, as published by the Alaska Department of Education, 1997 edition;
 - (5) deleted 8/31/90;
 - (6) repealed 4/17/98;
 - (7) Swimming Pool Guidelines, as published by the Alaska Department of Education, 1997 edition; and
 - (8) Site Selection Criteria and Evaluation Guideline, as published by the Alaska Department of Education, 1997 edition.
- (b) In the event of a conflict between publications incorporated by reference in (a) of this section, the publication prepared by the Department of Education controls.
- (c) Notwithstanding (a)(1) of this section, for the purpose of determining funding for a school capital project under AS 14.11, the square feet allowable must be determined under this subsection based on the grade levels offered in the school. The department's chart entitled "Allowable Square Feet Per Elementary Student", 1995 version, is adopted by reference and displays the square feet allowable per average daily membership (ADM) for an elementary school. The department's chart entitled "Allowable Square Feet Per Secondary Student", 1995 version, is adopted by reference and displays the square feet allowable per ADM for a secondary school. The base square feet allowable per ADM and supplemental square feet allowable per ADM are calculated, and additional square footage is approvable, as follows:
- (1) the base square feet allowable per ADM for an elementary school is based on the ADM for the school as follows:
 - (A) for an elementary school with an ADM of 10 - 250, inclusive, the base square feet allowable per ADM is equivalent to the remainder of $127.70 - (0.1700 \times \text{ADM})$;
 - (B) for an elementary school with an ADM of 251 or more, the base square feet allowable per ADM is 85.00;
 - (2) the supplemental square feet allowable per ADM for an elementary school is based on the ADM for the school as follows:
 - (A) for an elementary school with an ADM of 10 - 250, inclusive, the supplemental square feet allowable per ADM is equivalent to the remainder of $44.87 - (0.07725 \times \text{ADM})$;
 - (B) for an elementary school with an ADM of 251 - 500, inclusive, the supplemental square feet allowable per ADM is equivalent to the remainder of $29.78 - (0.01700 \times \text{ADM})$;
 - (C) for an elementary school with an ADM of 501 or more, the supplemental square feet allowable per ADM is 21.25;
 - (3) the base square feet allowable per ADM for a secondary school is based on the ADM for the school as follows:
 - (A) for a secondary school with an ADM of 10 - 250, inclusive, the base square feet allowable

per ADM is equivalent to the remainder of $265.10 - (0.5800 \times \text{ADM})$;

(B) for a secondary school with an ADM of 251 or more, the base square feet allowable per ADM is 120.00;

(4) the supplemental square feet allowable per ADM for a secondary school is based on the ADM for the school as follows:

(A) for a secondary school with an ADM of 10 - 250, inclusive, the supplemental square feet allowable per ADM is equivalent to the remainder of $93.04 - (0.2280 \times \text{ADM})$;

(B) for a secondary school with an ADM of 251 - 500, inclusive, the supplemental square feet allowable per ADM is equivalent to the remainder of $42.05 - (0.02410 \times \text{ADM})$;

(C) for a secondary school with an ADM of 501 or more, the supplemental square feet allowable per ADM is 30.00;

(5) the base square feet allowable per ADM for a combined elementary and secondary school is the sum of the following factors, as applicable:

(A) for a school with an ADM of nine or less in elementary grades kindergarten - 6, 126.00 square feet per ADM for elementary grades kindergarten - 6;

(B) for a school with an ADM of 10 or more in elementary grades kindergarten - 6, the amount of base square feet per ADM calculated under (1) of this subsection;

(C) for a school with an ADM of nine or less in secondary grades 7 - 12, 259.30 square feet per ADM for secondary grades 7 - 12;

(D) for a school with an ADM of 10 or more in secondary grades 7 - 12, the amount of base square feet per ADM calculated under (3) of this subsection;

(6) the supplemental square feet allowable per ADM for a combined elementary and secondary school is based on the combined elementary and secondary ADM for the school as follows:

(A) for a combined elementary and secondary school with a combined elementary and secondary ADM of 10 - 250, inclusive, the supplemental square feet allowable per ADM is equivalent to the product of $\text{BSF} \times (0.3521 - (0.0002083 \times \text{ADM}))$, where BSF is the base square feet allowable per ADM calculated under (5) of this subsection;

(B) for a combined elementary and secondary school with a combined elementary and secondary ADM of 251 - 500, inclusive, the supplemental square feet allowable per ADM is equivalent to the product of $\text{BSF} \times (0.3504 - (0.0002008 \times \text{ADM}))$, where BSF is the base square feet allowable per ADM calculated under (5) of this subsection;

(C) for a combined elementary and secondary school with a combined elementary and secondary ADM of 501 or more, the supplemental square feet allowable per ADM is equivalent to the product of $0.2500 \times \text{BSF}$, where BSF is the base square feet allowable per ADM calculated under (5) of this subsection;

(7) a district may request the commissioner to approve a variance for additional space for a school; the request must be in writing and may not exceed five percent of the base square feet allowable for the school; the commissioner shall approve the request, subject to (g) of this section, if the commissioner finds

(A) that a unique educational program not envisioned by the educational facility planning guides set out in (a) of this section is required to meet the needs of the population to be served by the school; and

(B) at least one of the following:

(i) that the district has demonstrated that additional space is required to adequately house the unique educational program and that the effect of accommodating the additional space without a waiver prohibits the remainder of the population served by the school from having sufficient space for standard educational programs; or

(ii) that the added space is necessary to meet the needs of the educational program and is in the best interests of the state;

(8) the commissioner, at the request of the district, will, in the commissioner's discretion, approve a variance for additional space of not more than 10 square feet per ADM if the district's school project proposes the rehabilitation of or addition to an existing facility; the commissioner will approve a request under this paragraph only if the district's request is supported by an explanation of the reasons for the request that demonstrates:

- (A) the specific cause of each impact;
- (B) the square feet affected by the cause of impact; and
- (C) the reason for this condition merits an exception;

(9) the base square feet allowable per ADM for a mixed grade school is based on the combined elementary and secondary ADM for the school as follows:

(A) for a mixed grade school with a combined elementary and secondary ADM of nine or less, 126.00 square feet per ADM for elementary grades kindergarten - 6, plus 259.30 square feet per ADM for secondary grades 7 - 12;

(B) for a mixed grade school with a combined elementary and secondary ADM of 10 or more, the amount of base square feet allowable is the sum of the following factors, as applicable:

(i) for ADM in elementary grades kindergarten - 6, the amount of base square feet per ADM is calculated under (1) of this subsection;

(ii) for ADM in secondary grades 7 - 12, the amount of base square feet per ADM is calculated under (3) of this subsection;

(10) the supplemental square feet allowable per ADM for a mixed grade school is based on the combined elementary and secondary ADM for the school as follows:

(A) for a mixed grade school with a combined elementary and secondary ADM of 10 - 250, the supplemental square feet allowable per ADM is equivalent to the product of $BSF \times (0.3521 - (0.0002083 \times \text{combined ADM}))$, where BSF is the total base square feet allowable per ADM calculated under (9) of this subsection;

(B) for a mixed grade school with a combined elementary and secondary ADM of 251 - 500, inclusive, the supplemental square feet allowable per ADM is equivalent to the product of $BSF \times (0.3504 - (0.0002008 \times \text{combined ADM}))$, where BSF is the total base square feet allowable per ADM calculated under (9) of this subsection;

(C) for a mixed grade school with a combined elementary and secondary ADM of 501 or more, the supplemental square feet allowable per combined ADM is equivalent to the product of $0.2500 \times BSF$, where BSF is the total square feet allowable per ADM calculated under (9) of this subsection.

(d) The department shall reduce a project budget in proportion to the amount that the project's design exceeds the square feet allowable as determined under (c) of this section. This subsection applies to a project that has not received a grant under AS 14.11, a project that has received money from the department for planning, and a project that has not secured the approval of the commissioner under 4 AAC 31.040. This subsection does not apply to a project that has secured the approval of the commissioner under 4 AAC 31.040.

(e) For the purposes of this section, the space of a building is the sum of the areas of the floors of a building in gross square feet. The floors of a building include a basement, a mezzanine, an intermediate floored tier, and a penthouse of headroom height. Space is measured from the interior face of an exterior wall or from the centerline of a wall that separates a building. In calculating the space of a building, the area of a covered walkway, porch, mechanical penthouse or similar space above an occupied floor, and an area that is open on all sides but roofed and paved are multiplied by

0.25. A pipe trench, exterior terrace or steps, chimney, or roof overhang is not included in calculating space.

(f) The provisions of

(1) subsections (c)(1) - (7), (d), and (e) as they read on and after October 10, 1995 and until April 17, 1998 do not apply to an application for a former school construction grant submitted under this chapter to the department before January 1, 1996;

(2) subsections (c) - (e) and (g) of this section as they read on and after April 17, 1998 do not apply to an application for a former school construction grant submitted under this chapter to the department before January 1, 1996.

(g) A request to approve a variance for additional space made and approved under (c)(7) of this section expires on the first day of October following the one-year anniversary of the commissioner's approval of it unless the district certifies to the department, no later than that date, the continued existence of the unique educational program described in (c)(7)(A) of this section for which the additional space was approved.

(h) Notwithstanding any provisions of (c) of this section, the commissioner will deny or disallow a determination of allowable space under (c)(1) - (6), (9), and (10) of this section and will deny a request to approve a variance for additional space under (c)(7) and (8) of this section if the commissioner finds that the space determination or approval of the request is the result of a choice in educational delivery by the school district that could be eliminated by a redistribution of school age populations between attendance centers in the funding community.

(i) Notwithstanding (a) - (h) of this section, the commissioner shall approve a variance from the limitations on allowable space in a school set out in this section for space that is jointly used by the school and another entity, if the request meets the requirements of this subsection and the department determines that the sharing entity is able to participate as specified in the agreement. The request must be made by a district, in writing, and meet the following:

(1) the space that is jointly used is subject to a formal binding agreement between the district and the entity sharing use; the agreement must cover allocation and method of sharing between the district and the entity of the following:

(A) the operating costs for the jointly used space for the life of the facility;

(B) future capital costs for the life of the facility;

(C) the initial capital costs for a new or remodeled facility only;

(2) the variance requested is limited to the amount of square footage that the entity sharing space accepts responsibility for in the agreement described in (1) of this subsection;

(3) a copy of the agreement described in (1) of this subsection is submitted with the request for variance.

(j) A variance approved under (i) of this section is no longer valid if the agreement upon which the variance was based is amended or terminated. If the agreement is amended or terminated, the district shall immediately notify the department and submit any new request for a variance in accordance with (i) of this section.

History -

Eff. 3/1/78, Register 65; am 6/9/83, Register 86; am 12/2/83, Register 88; am 8/31/90, Register 115; am 10/7/95, Register 136; am 4/17/98, Register 146; am 2/18/99, Register 149

Authority -

AS 14.07.020

AS 14.07.060

AS 14.11.011

AS 14.11.020
 AS 14.11.100
 AS 14.11.132

Editor's Notes -

The guides and charts mentioned in 4 AAC 31.020 may be obtained from the Department of Education, 801 W. Tenth St., Suite 200, Juneau, Alaska 99801-1894.

4 AAC 31.021

APPLICATIONS FOR GRANTS FOR CAPITAL IMPROVEMENT PROJECTS.

(a) A school district, as the term "district" is defined in AS 14.11.135, may apply for a capital improvement grant under AS 14.11.011 by September 1 of the fiscal year preceding the fiscal year for which the request is made. The application shall be made on forms prescribed by the commissioner and be accompanied by the school district's current six-year capital improvement plan prepared under 4 AAC 31.011, and the chief school administrator must certify that the application is submitted in accordance with law.

(b) Repealed 3/10/96.

(c) A grant application must include, as applicable, verification that

(1) the enrollment of the funding community will reach the design capacity of existing school facilities within two years;

(2) the situation cannot be relieved by adjusting the boundaries of service areas and transporting the children to nearby schools;

(3) the proposed facility, as demonstrated by commonly accepted demographic techniques, will reach and sustain design capacity within five years after the anticipated occupancy date;

(4) repealed 4/17/98;

(5) repealed 4/17/98;

(6) insurance or a program of self-insurance exists under 4 AAC 31.200 - 4 AAC 31.225 and will be revised, if necessary, to include the proposed facility.

(d) If a school district wants to request a waiver of local contribution for a grant allowable under AS 14.11.008, that district shall make a request in its grant application and include the basis for that request in that application.

(e) Using the criteria set out in 4 AAC 31.022 (b), the department will score each application and use the score to assign a priority ranking to the projects approved for eligibility. A school district may use the original application and its score for one year after application was filed if, for a school capital project identified in the district's six-year capital improvement plan,

(1) the school district specifies, in a letter accompanying the six-year plan, which, if any, of the project applications it wants the department to consider beyond the initial application period;

(2) the chief school administrator certifies in writing that the district's eligibility for any additional square footage associated with the project has not decreased; and

(3) for a facility or facilities that are a school capital project,

(A) the physical condition of the facility has not deteriorated so as to increase the project's cost to exceed the amount determined by application of the inflation factor under (f) of this section; and

(B) health and life safety conditions and code conditions have not changed so as to affect the project's score under 4 AAC 31.022 (b).

(f) If, under (e) of this section, a district requests use of its previous year's application during the second year after application was filed, the department will add an inflation factor based on an



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FAX COVER SHEET

To:

Department of Education Subcommittee Membership

Number:

From:

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Date:

Subject:

of pages including cover:

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Notes:

From Fax # 269-0223

Hickel	Jlm	
Adams	Al	Alaska State Legislature - Senate
Babcock	Tuckerman	Matanuska Electrical Assn.
Cissna	Sharon	Alaska State Legislature - House
Cobaugh	Tom	Anchorage Christian Schools, Secondary Principal
Coghill	Bob	Fairbanks Schoolboard Member
Coghill	John	Alaska State Legislature - House
Evans	Don	Educational Resources, Inc.
Fisher	Paul	Kenai Assembly
Gaston	Sam	Teacher at Mt. Edgecumbe
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Kronberg	Rich	President, Anchorage Education Assn.
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Murphy	Tom	Koniag Education Department, Exec Director
Owen	Marvin	Pastor, First Baptist Church, Anchorage
Prosser	William	Cook Inlet Region, Inc.
Rehfeld	Karen	Dept of Education - Dept Contact
Walters	Jeff	School teacher for public school system
Williams	Bonnie	

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February 21, 1995

MEMORANDUM

TO: Representative Jeannette James

FROM: Linda Brooks
Legislative Analyst

RE: Measuring the Success of Privately Managed Public Schools
Research Request 95.138

A private company, Education Alternatives Incorporated (EAI), won a five-year contract to operate nine public schools in Baltimore. EAI began running the nine Baltimore schools in September of 1992 and expects to make a profit on its operation as well as to improve student achievement. Teachers' unions and other groups have subjected the EAI experiment to intense scrutiny. The mayor of Baltimore has linked the future of EAI in Baltimore's schools to test score results. Given the scrutiny and demand for immediate results, EAI realizes that the company's future and ability to expand into other school districts depends directly upon its success in Baltimore; therefore, EAI has been working to make its nine schools into showcases.

The question is whether the academic achievement of the children at the nine schools has improved over academic years 1992-93 and 1993-94. Unfortunately, there is no clear answer yet. The issue of test scores for the EAI schools has become embroiled in controversy. A panel of educators picked by EAI reviewed the standardized test scores for the EAI schools. In reviewing the scores, the panel threw out occurrences of the lowest possible score, a "1." They justified throwing out the "1" scores on grounds of validity, questioning the accuracy of a "1" score. After the "1" scores were thrown out, the remaining scores for children at the EAI schools showed more improvement than scores for children attending non-EAI public schools in Baltimore. According to the analysis by EAI's panel, the rise in math scores at six of the EAI schools exceeded the average districtwide gain. In reading, students' scores at five EAI schools exceeded the average districtwide gain.

However, opponents of the EAI experiment quickly pointed out that throwing out "1" scores was not a practice normally used by the Baltimore School District in evaluating test results. Members of the city council have questioned the scores and the ability of the school superintendent to

objectively evaluate EAI's work.¹ Baltimore Mayor Kurt Schmoke has said that EAI's assessment of its performance sharply contrasts with school system statistics that showed overall average test scores declined for eight EAI schools while rising districtwide during the experiment's first two years. The mayor further indicated that EAI's future in Baltimore will depend primarily on the results of an independent evaluation by the Center for Educational Research at the University of Maryland.²

Attached is an article, "Private Management of Public Schools, from the *Congressional Quarterly Researcher*, that provides an overview of how for-profit companies are becoming involved in education reform and EAI's contract with the Baltimore school system.

Attachment

¹Gary Gately "City Council to Check on EAI's Work," *Baltimore Sun*, December 8, 1994.

²Gary Gately and Joanna Daemmrigh. "Mayor Links Future of EAI to Test Scores," *Baltimore Sun*, October 21, 1994.

Department of Education S		
Hickel	Jim	258-1055
Adams	Al	X 465-4821
Babcock	Tuckerman	X 761-8368
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Coghill	Bob	X 479-2215
Coghill	John	X 456-8245
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Gaston	Sam	349-8691
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Owen	Marvin	279-6315
~~Prosser~~	~~William~~	~~269-5182~~
Rehfeld	Karen	X 465-3452
Walters	Jeff	X 456-2159
Williams	Bonnie	X 455-6652

x = long distance



COMMISSION ON PRIVATIZATION

Department of Education Subcommittee

Draft of Subcommittee Minutes July 30, 1999

Introduction of Chairman: Jim Hickel, Chairman of the Education Subcommittee, called the meeting to order at 12:05 p.m.

Appointment of Secretary: Hickel asked Rynnieva Moss if she would serve as secretary of the subcommittee. She agreed.

Roll Call:

Members present: Jim Hickel, Tuckerman Babcock, Sam Gaston, JoAnn Henderson, Rynnieva Moss, Tom Murphy, Jeff Walters, Bonnie Williams, Representative John Coghill, William Prosser, and Bob Coghill.

Members Absent: Tom Cobaugh, Don Evans, Paul Fischer, Marvin Owen, Senator Adams, and Dale Brock.

Also present in Fairbanks was Joe Hayes, legislative aide for Rep. Tom Brice, and Nancy Allen, a teacher with the Fairbanks North Star Borough School District. Karen Rehfeld, resource person for DOE participated by teleconference from Juneau.

Introduction of members:

Chairman Hickel asked everyone present to introduce him or herself and give a brief history of their background.

Jim Hickel said he is a former contractor who has spent the last 13 years starting and operating a private school, the Holy Rosary Academy.

Tuckerman Babcock came to Alaska in 1966 and is currently manager of the Government Strategic Planning Department of Matanuska Electric Association. His father is a retired teacher and he has had a lot of involvement in education. His children have attended public school, private school, and have been home schooled.

Bob Coghill is executive director of the non-profit Breast Detection Center in Fairbanks. He has served on the Fairbanks North Star Borough Assembly and currently serves on the FNSB School Board. Phone number: (907) 479-3909; Fax: (907) 479-2215; e-mail address: rcoghill@mosquitonet.com.