

ALASKA LEGISLATURE COMMITTEE FILES 1981-1982 86/2

1489 shess SB 195 - SB 211 1989

determining whether there would be hardship to the employee, the board considered her family's financial situation and found that she was not entitled to the waiver.

Commission members discovered that this was not an isolated instance. A number of retired state employees have undergone similar experiences. They relied on assurances from the division of retirement and benefits only to discover a considerable time later that errors had been made and that their benefits would be reduced.

The commission recommends that a two-year statute of limitations be placed on the collection of overpayments. Two years gives the Division of Retirement and Benefits ample time to audit its records and find and correct any errors made. After that period of time, a retired person should be freed from the burden of having to pay back the state for mistakes of the state's employees. This protection should be available only in cases where the retired person did not contribute to causing the error. It should not apply to persons working for employers other than the state, since those employers may not be in a financial position to absorb the cost of errors made by state employees.

SECTION BY SECTION ANALYSIS

Section 1. AS 14.25.173 is amended by adding a new subsection to read:

(b) An adjustment which requires repayment of benefits may not be made under this section if

(1) the incorrect benefit was first paid two years or more before the member or teacher or beneficiary was notified of the change

or error; and

(2) the change or error was not caused by the member or teacher or beneficiary.

Comment

This section amends the Teachers Retirement System by prohibiting the Division of Retirement and Benefits from decreasing benefits in order to collect for a previous overpayment if two conditions are met. The first condition is that the overpayment began two years or more before the division told the retired teacher of the error. The second condition is that the teacher did not cause the error.

Sec. 2. AS 39.35.520 is amended by adding a new subsection to read:

(b) An adjustment which requires repayment of benefits may not be made under this section if

(1) the incorrect benefit was first paid two years or more before the employee or beneficiary was notified of the change or error;

(2) the change or error was not caused by the employee or beneficiary; and

(3) the change or error relates to the employee's credited service with the state and not with another participating employer.

Comment

This section amends the Public Employee Retirement System in the same way that section 1 amends the TRS. However, in this section there is an additional condition. The error in computation must relate to the employee's credited

service with the state, and not with another participating employer.

Sec. 3. This Act is retroactive to July 1, 1979.

Sec. 4. This Act takes effect immediately in accordance with AS 01.10.-070(c).

Comment

Section 3 makes the Act retroactive in order to include the retired person who testified before the commission. Section 4 provides that the Act takes effect immediately in order to address the hardship to retired state employees.

FISCAL NOTE

I. REQUEST

Bill/Resolution No. _____ Senate Bill No. 105
 Title An Act Limiting the Adjustment of Retirement Benefits
 Requested by Senator Vic Fischer Date _____

II. FISCAL DETAIL

Agency Affected Administration - Division of Retirement and Benefits
 Program Category Affected Labor Services
 BRU, Program, or Subprogram(s) Affected 02-96-8-01-01 (PERS)

(Note: If more than one budget component is affected, separate line-item amounts and funding for each component in the analysis section.)

EXPENDITURES (Thousands of Dollars)

	FY 81	FY 82	FY 83	FY 84	FY 85	FY 85
100 PERSONAL SERVICES						
200 TRAVEL						
300 CONTRACTUAL						
400 COMMODITIES						
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 STATE TRS MATCHING						
100 BENEFITS						
TOTAL	-0-	-0-	-0-	-0-	-0-	-0-

FUNDING (Thousands of Dollars)

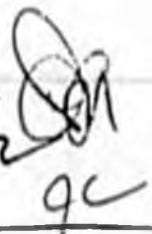
GENERAL FUND						
FEDERAL FUNDS						
VETERAN'S FUND						
FISH & GAME FUND						
HIGHWAY FUND						
AIRPORT FUND						
CAPITAL FUND						
PERS						
TRS						

POSITIONS NONE

FULL TIME						
PART TIME						
TEMPORARY						

III. ANALYSIS (See Fiscal Note Preparation Instructions, Section II)

Undoubtedly there will be some costs to the retirement system, but they cannot be measured. In most instances the individual adjustment would be small.

Ken Humphreys, for 

IV. DATE 4/02/81 PREPARED BY Paul A. Arnoldt, Director
 AGENCY Division of Retirement & Benefits
 PHONE 465-4460
 Original: Legislative Finance
 cc: Budget and Management
 Prime Sponsor (First Legislator Named) Senator Ray

FISCAL NOTE

I. REQUEST
 Bill/Resolution No. Senate Bill No. 195
 Title An Act Limiting the Adjustment of Retirement Benefits
 Requested by _____ Date _____

II. FISCAL DETAIL
 Agency Affected Administration - Division of Retirement & Benefits
 Program Category Affected Labor Services and Elementary & Secondary Education
 BRU, Program, or Subprogram(s) Affected 02-96-8-01-01-02 (TRS) 02-11-8-02-01-00 (TRS MATCH)
 (Note: If more than one budget component is affected, separate line-item amounts and funding for each component in the analysis section.)

EXPENDITURES (Thousands of Dollars)

	FY 81	FY 82	FY 83	FY 84	FY 85	FY 86
100 PERSONAL SERVICES						
200 TRAVEL						
300 CONTRACTUAL						
400 COMMODITIES						
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 STATE TRS MATCHING						
100 BENEFITS						
TOTAL	-0-	-0-	-0-	-0-	-0-	-0-

FUNDING (Thousands of Dollars)

GENERAL FUND						
FEDERAL FUNDS						
VETERAN'S FUND						
FISH & GAME FUND						
HIGHWAY FUND						
AIRPORT FUND						
CAPITAL FUND						
PERS						
TRS						

POSITIONS NONE

FULL TIME						
PART TIME						
TEMPORARY						

III. ANALYSIS (See Fiscal Note Preparation Instructions, Section III)

Undoubtedly there will be some costs to the retirement system, but they cannot be measured. In most instances the individual adjustment would be small.

IV. DATE 4/02/81 PREPARED BY Paul B. Arnoldt, Director
 AGE? ✓ Division of Retirement & Benefits
 PHONE 465-4460
 Original: Legislative Finance
 cc: Budget and Management
 Prime Sponsor (First Legislator Named)
 Office of the Governor (Keith Specking)

Ken Humphreys, for
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1966

REPORT OF THE
BLUE RIBBON COMMISSION ON THE
STATE PERSONNEL ACT
TO THE
TWELFTH ALASKA STATE LEGISLATURE
FIRST SESSION

Senator Bill Ray
Chairman

February, 1981

SB 196

SENATE BILL 196 : RELATING TO THE MEMBERSHIP OF THE
PUBLIC EMPLOYEES RETIREMENT BOARD.

PURPOSE

This bill amends the Public Employees Retirement Act to change the membership of the Public Employees Retirement Board. The law presently requires that the three members who are appointed to the Personnel Board shall also serve on the PERB. AS 39.35.030. Those three individuals are also, by statute, appointed to the Labor Relations Agency, which is involved in collective bargaining issues. AS 23.40.250(3). The activities of both the LRA and the PERB have grown considerably recently. In the last legislative session, the PERB was made responsible for overseeing the supplemental employee benefit program and the deferred compensation program for state employees. AS 39.35.040(9) and (10). The increase in the number of state employees who are members of collective bargaining organizations has led to additional work for the LRA. The three members of the Personnel Board are citizen volunteers appointed by the Governor who are not employed by the state.

While the issues which are addressed by the Personnel Board are related to some of the issues addressed by the Labor Relations Agency, this is not the case with the subjects of concern to the Public Employees Retirement Board. Therefore, the commission recommends that the members of the Personnel Board continue to serve as the members of the LRA and that they be removed from the PERB.

The PERB should be composed of four elected members and one member appointed by the Governor. In addition, the commission recommends that one of the elected members should be a retired person to insure that those most directly affected by the system have a voice in the decision-making body.

SECTION BY SECTION ANALYSIS

Section 1. AS 39.35.030(b) is amended to read:

(b) One (THREE) board member (MEMBERS) shall be appointed by the governor and shall serve at his pleasure (MEMBERS OF THE PERSONNEL BOARD OF THE DEPARTMENT OF ADMINISTRATION). The remaining four (TWO) board members shall be members of the system (AND) elected by the members of the system, and at least one of the elected board members shall be retired.

Comment

Section 1 of the bill sets out the changes in membership of the PERS board which are discussed above.

Sec 2. Notwithstanding AS 39.35.030(b), as amended by sec. 1 of this Act, a person serving on the Public Employees Retirement Board on the effective date of this Act who was from the personnel board of the Department of Administration shall continue to serve until his successor is elected or appointed by the governor.

Comment

Section 2 is a temporary measure to enable the board to continue to act until new members have been selected according to the new method.

FISCAL NOTE

I. REQUEST

Bill/Resolution No. Senate Bill No. 196
 Title An Act Relating to the Membership of the Public Employees Retirement Board
 Requested by Senator Fiscner Date 4/03/81

II. FISCAL DETAIL

Agency Affected Administration - Division of Retirement and Benefits

Program Category Affected Labor Services

BRU, Program, or Subprogram(s) Affected 02-96-8-01-01-01 (PERS)

(Note: If more than one budget component is affected, separate line-item amounts and funding for each component in the analysis section.)

EXPENDITURES (Thousands of Dollars)

	FY 81	FY 82	FY 83	FY 84	FY 85	FY 86
100 PERSONAL SERVICES						
200 TRAVEL						
300 CONTRACTUAL		14.0				
400 COMMODITIES						
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 STATE TRS MATCHING						
100 BENEFITS						
TOTAL	-0-	14.0	-0-	-0-	-0-	-0-

FUNDING (Thousands of Dollars)

GENERAL FUND						
FEDERAL FUNDS						
VETERAN'S FUND						
FISH & GAME FUND						
HIGHWAY FUND						
AIRPORT FUND						
CAPITAL FUND						
PERS		14.0				
TRS						

POSITIONS NONE

FULL TIME						
PART TIME						
TEMPORARY						

III. ANALYSIS (See Fiscal Note Preparation Instructions, Section III)

Costs in FY82 are to conduct a PERS wide election of two Board members.

Term of office is six years.

IV. DATE 4/06/81 PREPARED BY Paul R. Arnoldt, Director
 AGENCY Division of Retirement & Benefits
 PHONE 465-4460

Original: Legislative Finance
 cc: Budget and Management
 Prime Sponsor (First Legislator Named) Senator Ray
 Office of the Governor (Keith Specking)

Ken Humphreys, for [Signature]
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JUNEAU, ALASKA

Alaska State Legislature

BLUE RIBBON COMMISSION ON THE
STATE PERSONNEL ACT
Pouch AG/Mail Stop 0123
Juneau, Alaska 99811
(907) 465-4442

Senator Bill Ray
Chairman

MEMORANDUM

April 3, 1981

TO: Senate State Affairs Committee

FROM: Teresa B. Cramer *TBC*
Administrative Assistant

SUBJECT: SB 105 Relating to the Membership of the Public Employees Retirement Board.

This bill amends the Public Employees Retirement Act to change the membership of the Public Employees Retirement Board. The law presently requires that the three members who are appointed to the Personnel Board shall also serve on the PERB. AS 39.35.030. Those three individuals are also, by statute, appointed to the Labor Relations Agency, which is involved in collective bargaining issues. AS 23.00.250(3). The activities of both the LRA and the PERB have grown considerably recently. In the last legislative session, the PERB was made responsible for overseeing the supplemental employee benefit program and the deferred compensation program for state employees. AS 39.35.040(9) and (10). The increase in the number of state employees who are members of collective bargaining organizations has led to additional work for the LRA. The three members of the Personnel Board are citizen volunteers appointed by the Governor who are not employed by the state.

While the issues which are addressed by the Personnel Board are related to some of the issues addressed by the Labor Relations Agency, this is not the case with the subjects of concern to the Public Employees Retirement Board. Therefore, the Blue Ribbon Commission recommends that the members of the Personnel Board continue to serve as the members of the LRA and that they be removed from the PERB. The PERB should be composed of four elected members and one member appointed by the Governor. In addition, the commission recommends that one of the elected members should be a retired person to insure that those most directly affected by the system have a voice in the decision-making body.

Section 1 of the bill sets out the changes in membership of the PERS board which are discussed above.

Section 2 is a temporary measure to enable the board to continue to act until new members have been selected according to the new method.

TBC:lmk



Alaska Court System
State of Alaska

FRANK RAYE
Personnel Director

OFFICE OF ADMINISTRATIVE DIRECTOR

303 K Street
Anchorage, Alaska 99501

October 12, 1981

The Honorable Victor Fischer, Chair
Senate Affairs Committee
Pouch V
Juneau, AK 99811

Dear Senator Fischer:

In response to your memorandum of September 29, 1981, I have read the 16 bills concerning retirement now being considered by your committee.

The main reason I am commenting on these proposals is to urge re-writing of Chapter 35 of Title 39 to eliminate present discriminatory provisions. I also wish to speak against discriminatory provisions contained in SB 557, 143, 402 and 394 as well as supporting SB 196.

SB 557:

First I would like to point out that SB 557 is an effort to make some housekeeping corrections to ease administrative oversights. In that effort, the bill has some merit. The problem is that all of Chapter 35 of Title 39 needs to be re-written to comply with the state constitution and with Title 18 protections against discrimination on the basis of sex, marital status, and parenthood.

SB 557 proposes on page 15 to re-write AS 39.35.535 to give medical benefits only to retired employees, their spouses or children. Single retired persons are thereby precluded from naming a beneficiary of their own. Yet single employees pay into the retirement system at the same rate as married employees.

The Honorable Victor Fischer
October 12, 1981
page 2

At this time, AS 39.35 provides married state employees and their spouses an opportunity to choose a type of financial security called a joint survivor option. However, single employees and their beneficiaries do not have this choice. Under AS 39.35.420 and 440, married employees may choose the joint survivor option once they have been employed for five years and have thereby "vested". However, single employees with five years of service are denied that choice.

Specifically, a single employee is not permitted to have his or her beneficiary receive that employee's retirement money through a joint survivor option. Only married employees have that choice under AS 39.35.420 and 440. However, AS 39.35.450 allows "a dependent approved by the administrator" to also be a beneficiary. Such restrictions are based on a false assumption that only spouses and dependent children can develop an economically dependent relationship. Yet both single and married employees pay into the retirement system at the same rate and do not have the same benefits. It is my position that denying single employees an option granted only to married employees is a form of discrimination violating AS 18.80.220 which states in part:

"It is unlawful for an employer to refuse employment to a person or to . . . discriminate against him in compensation or in a term, condition, or privilege of employment because of his . . . sex, marital status . . . or parenthood;"

Since retirement is a compensation, term, condition and privilege of employment, the retirement statutes as now constituted are, in my opinion, illegal.

Furthermore, the Division of Retirement and Benefits' procedures used to determine the amount of money given to employees' spouses under the joint survivor option, are based on outdated, separate male and female mortality tables which have been held illegally discriminatory in many recent court cases. See, for example, City of Los Angeles v. Manhart, 435 US 702 (1978). This discrimination on the basis of sex, in my opinion, is also a violation of Title 18 as quoted above.

Also under SB 557, a new section, AS 39.30.095, is proposed which gives the commissioner of administration complete power and authority over a newly established fund for health and life insurance benefits. Why is it necessary to establish this fund and why is there no check on the commissioner's control over this fund? Why is there no provision for input from affected persons?

SB 143:

SB 143 proposes to grant some state employees credit for unused sick leave upon retirement. On the face of it, there appears

The Honorable Victor Fischer
October 12, 1981
page 3

to be nothing wrong with this amendment to AS 39.35.315. The problem is that all state employees would not benefit from this proposed change. Several years ago AS 39.20.310 established a separate group of state employees who no longer have leave. Under Chapter 20, sick and annual leave were done away with and combined into personal leave with a "sick leave bank" established for emergency illnesses. SB 143 fails to speak to those employees, their personal leave and their sick leave bank. Therefore, passage of SB 143 in its present form would discriminate against about 3,000 of the 9,000 state employees who no longer have sick leave. In other words, this bill affects only about two thirds of permanent state employees and leaves the other one third without comparable benefits.

In order to avoid this discrimination, SB 143 should either not be passed out of committee or should be re-written to include employees who have personal leave and a sick leave bank.

SB 402:

Presently state employees who are veterans may buy back up to five years of their military service as credited time for state retirement. However, under present law this buy back cannot take place until the employee is vested or has worked for the state at least five years. SB 402 proposes to eliminate the requirement that an employee must work five years for the state (or be vested) before buying back the military time.

I oppose this bill because it would allow new employees who are veterans to vest their retirement immediately after being employed in state service. All other employees cannot vest until they have had five years of state service.

Furthermore, the formula which establishes the cost of buying back five years of military time amounts to about one third of the employee's annual salary at the time of his or her eligibility to buy back. That means that those veterans who have already bought back their time under this law, after having worked five years for the state, have paid more than a new employee would pay under this proposed law. The reason for this discrepancy is that a five year employee will earn more than a new employee because of annual step pay increases, and the greater probability of promotion.

SB 394

SB 394 proposes to give retirement credit to teachers only who have served in the peace corps. The philosophical base to this proposal is arguable when compared to preference for veterans

The Honorable Victor Fischer
October 12, 1981
page 4

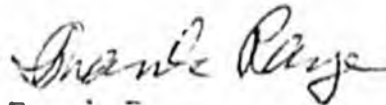
who have risked their lives for their country. What is not arguable is the gross inequitability of the proposition to give retirement credit to one group of state employees (here teachers) and not to other state employees. This clearly discriminatory bill should not be passed out of committee.

SB 196:

I support SB 196 to mandate that at least one member of the retirement board be a retired person. It is a logical and equitable proposal since the greatest impact of decisions made by the board will be with regard to retired persons.

If you have any questions on the points raised in this letter, I'll be glad to answer them. Thank you for taking the time to consider these issues.

Sincerely,



Frank Raye
Personnel Director

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JUNEAU, ALASKA

Alaska State Legislature

BLUE RIBBON COMMISSION ON THE
STATE PERSONNEL ACT
Pouch AG/Mail Stop 0123
Juneau, Alaska 99817
(907) 465-4442

Senator Bill Ray
Chairman

MEMORANDUM

April 3, 1981

TO: Senate State Affairs Committee

FROM: Teresa B. Cramer *TBC*
Administrative Assistant

SUBJECT: SB 197 Applying the Administrative Procedure Act (AS 44.62)
to Adoption of Regulations by State Retirement Systems.

This bill amends the law to require that both the Public Employees Retirement Board and the Teachers Retirement System administrators comply with the Administrative Procedure Act when adopting regulations. Both retirement systems are presently exempted from the APA. The Blue Ribbon Commission recommends the change because of concern that regulations have been adopted in the past without adequate opportunity for public comment. Although rule-making under the APA may be more time-consuming than rule-making under the present methods of the retirement systems, the improved public notice requirements outweigh that disadvantage. In instances in which either retirement system is faced with a need for immediate change in regulations, the APA provides for emergency rule-making. AS 44.62.250.

Section 1 of the bill amends the Public Employees Retirement System statute to make the PERS subject to the APA rule-making requirements.

Section 2 amends the Teachers Retirement System statute to make the TRS subject to the APA rule-making requirements.

TBC:lmk

FISCAL NOTE

I. REQUEST

Bill/Resolution No. _____ Senate Bill No. 197
 Title An Act Applying the Administrative Procedure Act (AS 44.62) to Adoption of Regulation
 Requested by Senator Vic Fischer Date _____

II. FISCAL DETAIL

Agency Affected Administration - Division of Retirement and Benefits
 Program Category Affected Labor Services
 BRU, Program, or Subprogram(s) Affected 02-96-8-01-01 (PEPS)
 (Note: If more than one budget component is affected, separate line-item amounts and funding for each component in the analysis section.)
EXPENDITURES (Thousands of Dollars)

	FY 81	FY 82	FY 83	FY 84	FY 85	FY 86
100 PERSONAL SERVICES						
200 TRAVEL						
300 CONTRACTUAL						
400 COMMODITIES						
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 STATE TRS MATCHING						
100 BENEFITS						
TOTAL	-0-	-0-	-0-	-0-	-0-	-0-

FUNDING (Thousands of Dollars)

GENERAL FUND						
FEDERAL FUNDS						
VETERAN'S FUND						
FISH & GAME FUND						
HIGHWAY FUND						
AIRPORT FUND						
CAPITAL FUND						
PERS						
TRS						

POSITIONS NONE

FULL TIME						
PART TIME						
TEMPORARY						

III. ANALYSIS (See Fiscal Note Preparation Instructions, Section III)

IV. DATE 4/02/81 PREPARED BY Ken Humphreys, for Paul B. Arnold, Director
 AGENCY Division of Retirement & Benefits
 PHONE 465-4460

Original: Legislative Finance
 cc: Budget and Management
 Prime Sponsor (First Legislator Named) Senator Ray
 Office of the Governor (Keith Specking)

REPORT OF THE
BLUE RIBBON COMMISSION ON THE
STATE PERSONNEL ACT

TO THE
TWELFTH ALASKA STATE LEGISLATURE
FIRST SESSION

Senator Bill Ray
Chairman

February, 1981

SB 197

SENATE BILL 197: APPLYING THE ADMINISTRATIVE PROCEDURE
ACT (AS 44.62) TO ADOPTION OF REGULATIONS
BY STATE RETIREMENT SYSTEMS.

PURPOSE

This bill amends the law to require that both the Public Employees Retirement Board and the Teachers Retirement System administrators comply with the Administrative Procedure Act when adopting regulations. Both retirement systems are presently exempted from the APA. The commission recommends the change because of concern that regulations have been adopted in the past without adequate opportunity for public comment. Although rule-making under the APA may be more time-consuming than rule-making under the present methods of the retirement systems, the improved public notice requirements outweigh that disadvantage. In instances in which either retirement system is faced with a need for immediate change in regulations, the APA provides for emergency rule-making. AS 44.62.250.

SECTION BY SECTION ANALYSIS

Section 1. AS 39.35.042 is repealed and reenacted to read:

Sec. 39.35.042. REGULATIONS. Adoption of regulations under this chapter is subject to the Administrative Procedure Act (AS 44.62).

Comment

Section 1 of the bill amends the Public Employees Retirement System statute to make the PERS subject to the APA rule-making requirements.

Sec. 2. AS 14.25.022 is repealed and reenacted to read:

Sec. 14.25.022. REGULATIONS. Adoption of regulation by the administrator under this chapter is subject to the Administrative Procedure Act (AS 44.62).

Comment

Section 2 amends the Teachers Retirement System statute to make the TRS subject to the AFA rule-making requirements.

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SB 199 file

P.O. Box 635
Kotzebue, AK 99752
April 13, 1981

Senator Charles Parr
Alaska State Legislature
Pouch V (MS 3100)
Juneau, AK 99811

Reference: Senate Bill 199

Dear Senator Parr:

As you suggested at our meeting on April 3, I am writing this letter in regards to Senate Bill 199.

Prior to July 1, 1978, when a B.I.A. teacher or administrator was absorbed out of a B.I.A. school and into an Alaskan REAA school, he or she was allowed to transfer in up to 15 years of their Alaska B.I.A. service into TRS at the 7% rate. Under this procedure it was possible for a teacher or administrator to retire under both federal and state systems using the same service years (double dipping).

On or after July 1, 1978 the law was changed to allow a person to bring in only 5 years of Alaska BIA service (at the 7% rate) losing any Alaskan service beyond 5 years. This has created an inequitable situation for some people that were caught between the state and federal system. If, for example, a person had between 5 and 8 years of Alaska BIA service (like my wife and I), and joined TRS after July 1, 1978, that person totally lost credit for Alaskan BIA service beyond 5 years. In our case, as with a few others that this bill affected, we have no intentions of ever receiving retirement from the federal government. Our only retirement will be the Alaska TRS.

There now exists two sets of regulations on your books. One set allows ex-BIA teachers to bring in up to 15 years service at 7% and "double dip" (those who joined prior to July 1978). The other set allows other ex-BIA teachers to bring in only 5 years and no "double dipping" privilege (those who joined after July 1978).

I believe a more equitable bill such as 199 needs to be passed. It is a bill that would enable teachers to bring into TRS all of their Alaskan service at the 7% rate. As teachers in the "bush" since 1971 we have felt a commitment to respect the community's self-determination regarding the school system they elected to have for their children. We feel it's unfair to ask teachers who have settled into a particular place to move

Page 2

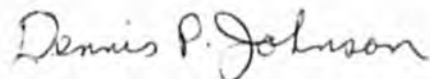
Senator Charles Parr

April 13, 1981

after 5 years in order to get their years of service counted towards TRS. We are not asking to receive a double retirement, but as these communities are absorbed by RFAA's we believe teachers there should be allowed to bring in all of their Alaska service (when they relinquish those years under the Civil Service System).

Thank you for your time and consideration.

Sincerely,

A handwritten signature in cursive script that reads "Dennis P. Johnson".

Dennis P. Johnson

interim is seven percent of the base salary upon reentering membership service, multiplied by the number of years of interim outside, military, and Alaska BIA service. Compound interest at the rate prescribed by regulation shall be added to the arrearage indebtedness beginning July 1, 1963, or the date of reemployment as a member, whichever is later, to the date of payment or the date of retirement, whichever occurs first.

(b) If a member joins the system on or after July 1, 1978, and has creditable outside service, the member may claim this service. If claimed, the member is indebted to the retirement fund as follows:

(1) The arrearage indebtedness is the full actuarial cost of providing benefits for the service being claimed. Compound interest at the rate prescribed by regulation shall be added to the arrearage indebtedness beginning the date the actuarial cost is established to the date of payment or the date of retirement, whichever occurs first.

(2) If a member terminates from the system and is subsequently reemployed as a member, the arrearage indebtedness for outside service during the interim is the full actuarial cost of providing benefits for the interim service being claimed. Compound interest at the rate prescribed by regulation shall be added to the arrearage indebtedness beginning the date the actuarial cost is established to the date of payment or the date of retirement, whichever occurs first.

(3) A member who joins the system on or after July 1, 1978, may claim no more than five years Alaska BIA service. A member who has, at the time he claims Alaska BIA service, a vested military or federal retirement benefit, or a member who acquires a vested military or federal retirement benefit after claiming Alaska BIA service shall have his arrearage indebtedness for that service recalculated under (1) or (2) of this subsection, as appropriate, retroactive to the date he claimed the service.

(c) The total military service claimed may not exceed five years. The combined total of outside and military service may not exceed 10 years, except that, if entry into the armed forces is immediately preceded by membership service and within one year after discharge is continued by membership service, that service will not be counted for purposes of determining the applicability of the 10-year limitation on the combined total of outside and military service. The combined total of outside, military, and Alaska BIA service may not exceed 15 years. (§ 7 ch 145 SLA 1955; am § 3 ch 142 SLA 1957; am § 5 ch 89 SLA 1960; am § 2 ch 86 SLA 1963; am § 11 ch 70 SLA 1964; am §§ 3, 4 ch 151 SLA 1966; am § 2 ch 76 SLA 1968; am §§ 3, 4 ch 138 SLA 1970; am § 3 ch 66 SLA 1973; am § 3 ch 128 SLA 1977; am § 14 ch 136 SLA 1978; am §§ 6, 7 ch 13 SLA 1980)

Effect of amendm
The 1977 amend
section.

The 1978 amendm
(3) to subsection (b).

The 1980 amendm
1980, substituted the
paragraph of subsec
which read: "If a
system before Jul
creditable outside se
has military service
Indian Affairs (BIA
is indebted to the
follows", inserted a
1, 1978" in the first
(b), and substituted
(3) in subsection (b)
read: "A member wh

Sec. 14.25.06
was not subject
subject to them
credit for retr
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would have ma
chapter for th
Retroactive cor
service before
by regulation
1, 1966, or th
whichever is l
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(b) If retro
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(c) A refund
service before
AS 14.25.062.

Effect of am
amendment, eff
subsection (a), s
for "creditable"
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substituted "it
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subject to" near
sentence, subst
"creditable" pre
end of the fir

retirement fund. Amounts due from the University of Alaska and interest as prescribed in this section may be deducted by the commissioner of administration from any state funds due the University of Alaska and the amount deducted transmitted to the administrator for deposit in the retirement fund.

(am § 12 ch 13 SLA 1980)

Effect of amendment.

The 1980 amendment, effective July 1, 1980, rewrote subsection (b).

As the rest of the section was not affected by the amendment, it is not set out.

Sec. 14.25.100. Credit for service in the armed forces. (a) A member who served as an active member of the armed forces of the United States may receive creditable service under this system up to a maximum of five years. Each 12 months of military service equals one school year, and lesser military periods will be determined for credit purposes in a proportionate ratio to a year. To receive creditable service under this section, the member must have received a discharge other than dishonorable. Credit for service in the armed forces shall be granted only if the member makes contributions for the service in the same manner as required for outside service under AS 14.25.060. The military service credited under this section shall be included in the 10-year limitation of outside service as specified in AS 14.25.060, except if entry into the armed forces is immediately preceded by Alaska membership service and following discharge is continued by Alaska membership service within one year thereafter, service may not be counted for purposes of determining the applicability of the 10-year limitation on outside service.

(b) Where a member is unable to resume teaching in a public school within one year following discharge because of hospitalization, rehabilitation training, a disability derived while in the armed forces, or other like circumstances, the administrator shall determine the allowance or disallowance of any service in the armed forces.

(c) Repealed by § 7 ch 155 SLA 1976.

(d) Repealed by § 7 ch 155 SLA 1976.

(e) A member may not be credited with the same period of service in the armed forces under this section if credit for that military service was granted under the public employees' retirement system (AS 39.35). The combined period of military service claimed under this section and AS 39.35 may not exceed five years. (§ 11 ch 145 SLA 1955; am § 8 ch 89 SLA 1960; am § 1 ch 57 SLA 1974; am §§ 5, 7 ch 155 SLA 1976; am § 5 ch 128 SLA 1977; am § 13 ch 13 SLA 1980)

Effect of amendments.

The 1976 amendment rewrote subsection (a) and repealed subsections (c) and (d), which required a teacher to make certain contributions for service in the

armed forces in order to obtain credit for such service and which related to credit for service where a teacher's entrance into the teaching profession was delayed due to military service, respectively.

Department of Education; the age limits set out in this paragraph do not apply to a child who is totally and permanently disabled;

(13) "disabled member" means a member who is terminated, who has not received a refund from the system, and who is receiving a disability benefit from the system;

(14) "early retirement" means retirement under AS 14.25.110(b);

(15) "employer" means a public school district, the Board of Regents of the University of Alaska, the Department of Education, the National Education Association of Alaska, the Regional Resource Centers or the state legislature with respect to a state legislator who elects membership under AS 14.25.040(b);

(16) "former member" means a member who is terminated and who received a total refund of the balance of the mandatory contribution account, or who has requested in writing a refund of the balance of the mandatory contribution account;

(17) "full-time teacher" means a teacher occupying a position requiring teaching on a regular basis for the normal work period per day or week at a teaching assignment, excluding teaching as an assistant or graduate assistant or teaching on a substitute, temporary, or per diem basis;

(18) "inactive teacher or member" means a member who is terminated and who has not received a refund from the system or a member who is on leave of absence and who is not making contributions under AS 14.20.345;

(19) "mandatory contribution account" means the account maintained by the system to record the mandatory contributions of each member, including interest and adjustments to the account in accordance with AS 14.25.170;

(20) "membership service" means

(A) full or part-time service as a teacher in a public school in the Territory or State of Alaska, or both, under the supervision and control of the Territorial Board of Education or the Department of Education or the school board of a city, regional educational attendance area, or borough school district;

(B) full-time or part-time teaching at the University of Alaska or a full-time administrative position at the University of Alaska which requires academic standing and which has been approved for inclusion in the system by the administrator;

(C) any period during which the teacher receives a disability benefit under this system or is on an approved sabbatical leave granted in accordance with AS 14.20.310; or

(D) continuous service as a state legislator when performed by a state legislator who elects membership under AS 14.25.040(b), subject to the requirements of AS 14.25.040(c);

(21) "military service" means active duty in the armed forces of the United States;

STATE OF ALASKA

JAY S. HAMMOND, GOVERNOR

DEPARTMENT OF ADMINISTRATION

OFFICE OF THE COMMISSIONER

POUCH C

JUNEAU, ALASKA 99811

Ph: 465-2200

May 13, 1981

Honorable Charles Parr
Alaska State Legislature
Pouch V
Juneau, AK 99811

Dear Senator Parr:

Following is the information you requested from Mr. Logan on May 11, 1981, during his testimony before your committee on Senate Bill 199.

BIA teachers are eligible to retire from federal service once they attain five years service and reach age 62 or they may retire as early as age 50 if they have at least 30 years service.

The federal benefit formula is 1 1/2% for the first five years, 1 3/4% for the second five years, and 2% for all remaining years, times the average of the three highest annual salaries.

As you can see by the enclosed chart, if a teacher pays the full actuarial cost of BIA service, that cost would range from a low of 10.240% to a high of 16.186% of entrance salary for each year of service claimed.

I am enclosing a draft bill which would require a teacher, who joined the system on or after July 1, 1978, to pay the full actuarial cost of providing benefits for the claimed BIA service in the event that he is eligible to receive a retirement benefit from the federal government.

These changes to the bill notwithstanding, we are still opposed to the bill as it is contrary to the statutory purpose of the TRS which is to recruit and retain qualified teachers. This bill would enable teachers

Honorable Charles Parr

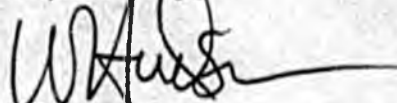
-2-

May 13, 1981

to retire with a smaller number of years of membership service, thus encouraging them to leave rather than remain in service.

If I can provide you with any additional information, please let me know.

Respectfully,

A handwritten signature in black ink, appearing to read "W.R. Hudson", with a long horizontal flourish extending to the right.

W.R. Hudson
Commissioner

WPH/rw

Enclosures

cc: Keith Specking
Judy Crondahl
Paul Arnoldt

STATE OF ALASKA - T. H. S.

COST TO CREDIT ONE YEAR OUTSIDE SERVICE

AGE	RATE	SALARY (IN THOUSANDS)																		
		20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
26	10.240%	2048	2150	2253	2355	2458	2560	2662	2765	2867	2970	3072	3174	3277	3379	3482	3584	3686	3789	3891
27	10.240%	2048	2150	2253	2355	2458	2560	2662	2765	2867	2970	3072	3174	3277	3379	3482	3584	3686	3789	3891
28	10.240%	2048	2150	2253	2355	2458	2560	2662	2765	2867	2970	3072	3174	3277	3379	3482	3584	3686	3789	3891
29	10.475%	2095	2200	2305	2409	2514	2619	2724	2828	2933	3038	3143	3247	3352	3457	3562	3666	3771	3876	3981
30	10.780%	2156	2264	2372	2479	2587	2695	2803	2911	3018	3126	3234	3342	3450	3557	3665	3773	3881	3989	4096
31	11.129%	2226	2337	2448	2560	2671	2782	2894	3005	3116	3227	3339	3450	3561	3673	3784	3895	4006	4118	4229
32	11.526%	2305	2420	2536	2651	2766	2882	2997	3112	3227	3343	3458	3573	3688	3804	3919	4034	4149	4265	4380
33	11.975%	2395	2515	2635	2754	2874	2994	3114	3233	3353	3473	3593	3712	3832	3952	4072	4191	4311	4431	4551
34	12.483%	2497	2621	2746	2871	2996	3121	3246	3370	3495	3620	3745	3870	3995	4119	4244	4369	4494	4619	4744
35	13.065%	2613	2744	2874	3005	3136	3266	3397	3528	3658	3789	3920	4050	4181	4311	4442	4573	4703	4834	4965
36	13.743%	2779	2918	3056	3195	3334	3473	3612	3751	3890	4029	4168	4307	4446	4585	4724	4863	5001	5140	5279
37	14.531%	2919	3065	3210	3356	3502	3648	3794	3940	4086	4232	4378	4524	4670	4816	4962	5108	5253	5399	5545
38	15.074%	3015	3166	3316	3467	3618	3769	3919	4070	4221	4371	4522	4673	4824	4974	5125	5276	5427	5577	5728
39	15.561%	3112	3268	3423	3579	3735	3890	4046	4201	4357	4513	4668	4824	4980	5135	5291	5446	5602	5758	5913
40	16.078%	3216	3376	3537	3698	3859	4019	4180	4341	4502	4663	4823	4984	5145	5306	5467	5627	5788	5949	6110
41	16.631%	3326	3493	3659	3825	3991	4158	4324	4490	4657	4823	4989	5156	5322	5488	5655	5821	5987	6153	6320
42	17.222%	3444	3617	3789	3961	4133	4306	4478	4650	4822	4994	5167	5339	5511	5683	5855	6028	6200	6372	6544
43	17.833%	3567	3745	3923	4102	4280	4458	4637	4815	4993	5172	5350	5528	5707	5885	6063	6242	6420	6598	6777
44	18.438%	3688	3872	4056	4241	4425	4610	4794	4978	5163	5347	5531	5716	5900	6085	6269	6453	6638	6822	7006
45	19.029%	3806	3996	4186	4377	4567	4757	4948	5138	5328	5518	5709	5899	6089	6280	6470	6660	6850	7041	7231
46	19.549%	3910	4105	4301	4496	4692	4887	5083	5278	5474	5669	5865	6060	6256	6451	6647	6842	7038	7233	7429
47	19.881%	3976	4175	4374	4573	4771	4970	5169	5368	5567	5765	5964	6163	6362	6561	6760	6958	7157	7356	7555
48	20.034%	4007	4207	4407	4608	4808	5009	5209	5409	5610	5810	6010	6211	6411	6611	6812	7012	7212	7413	7613
49	20.010%	4002	4202	4402	4602	4802	5003	5203	5403	5603	5803	6003	6203	6403	6603	6803	7004	7204	7404	7604
50	19.871%	3974	4173	4372	4570	4769	4968	5168	5365	5564	5763	5961	6160	6359	6557	6756	6955	7154	7352	7551
51	19.736%	3947	4145	4342	4539	4737	4934	5131	5329	5526	5723	5921	6118	6316	6513	6710	6908	7105	7302	7500
52	19.518%	3904	4099	4294	4489	4684	4880	5075	5270	5465	5660	5855	6051	6246	6441	6636	6831	7026	7222	7417
53	19.218%	3844	4036	4228	4420	4612	4805	4997	5189	5381	5573	5765	5958	6150	6342	6534	6726	6918	7111	7303
54	18.826%	3765	3953	4142	4330	4518	4707	4895	5083	5271	5460	5648	5836	6024	6213	6401	6589	6777	6966	7154
55	18.343%	3669	3852	4035	4219	4402	4586	4769	4953	5136	5319	5503	5686	5870	6053	6237	6420	6603	6787	6970
56	17.855%	3571	3750	3928	4107	4285	4464	4642	4821	4999	5178	5357	5535	5714	5892	6071	6249	6428	6606	6785
57	17.374%	3475	3649	3822	3996	4170	4344	4517	4691	4865	5038	5212	5386	5560	5733	5907	6081	6255	6428	6602
58	16.898%	3380	3549	3718	3887	4056	4225	4393	4562	4731	4900	5069	5238	5407	5576	5745	5914	6083	6252	6421
59	16.424%	3285	3449	3613	3778	3942	4106	4270	4434	4599	4763	4927	5091	5256	5420	5584	5748	5913	6077	6241
60	16.146%	3217	3379	3541	3703	3865	4027	4189	4350	4512	4674	4836	4998	5160	5321	5483	5645	5807	5969	6131

FISCAL NOTE

I. REQUEST

Bill/Resolution No. SENATE BILL NO. 199

Title An Act Relating to Retirement Benefits Under the TRS

Requested by Senator Parr

Date 5/11/81

II. FISCAL DETAIL

Agency Affected Administration - Division of Retirement & Benefits

Program Category Affected Labor Services and Elementary & Secondary Education

BRU, Program, or Subprogram(s) Affected 02-96-8-01-01-02 (TRS) 02-11-8-02-01-00 (TRS MATCH)

(Note: If more than one budget component is affected, separate line-item amounts and funding for each component in the analysis section.)

EXPENDITURES (Thousands of Dollars)

	FY 81	FY 82	FY 83	FY 84	FY 85	FY 86
100 PERSONAL SERVICES						
200 TRAVEL						
300 CONTRACTUAL						
400 COMMODITIES						
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 STATE TRS MATCHING		83.8	92.2	101.4	111.5	122.7
100 BENEFITS		15.1	16.6	18.3	20.1	22.1
TOTAL		98.9	108.8	119.7	131.6	144.8

FUNDING (Thousands of Dollars)

GENERAL FUND		98.9	108.8	119.7	131.6	144.8
FEDERAL FUNDS						
VETERAN'S FUND						
FISH & GAME FUND						
HIGHWAY FUND						
AIRPORT FUND						
CAPITAL FUND						
PERS						
TRS						

POSITIONS NONE

<u>FULL TIME</u>						
<u>PART TIME</u>						
<u>TEMPORARY</u>						

III. ANALYSIS (See Fiscal Note Preparation Instructions, Section III)

1. Estimate that approximately 100 teachers will qualify for additional service credit.
2. Estimate that those 100 teachers will receive credit for an additional 5 years.
3. Increase in contribution rate will be .0641% of covered TRS payroll (the TRS contribution is split 50/50 between the State matching contribution and the school district contribution).
4. Estimate FY 82 TRS covered payroll @\$261,775,000.

IV. DATE 5-13-81

PREPARED BY
AGENCY
PHONE

John A. Logan
Paul B. Arnoldt, Director
Division of Retirement & Benefits
465-4460

Original: Legislative Finance

cc: Budget and Management

Prime Sponsor (First Legislator Named) Senator Ferguson

Office of the Governor (Keith Specking)

S

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COMMITTEE REPORT

SENATE

FURTHER: Finance

2/23/81

Date: _____

Mr. President:

The Committee on HEALTH, EDUCATION AND SOCIAL SERVICES has had SB 203 making supplemental appropriations to the Dept. of Education

under consideration and (a majority of the committee) (the committee) reports it back with the following recommendations:

- do pass do not pass
- do pass w'th attached amendments(s)
- replace with CS for _____ same title
- and recommends _____ new title
- AND attaches a "Letter of Intent" New Fiscal Note
- reports it back without recommendation
- referred to the _____ Committee

MEMBERS SIGNING
DO PASS

[Handwritten signature]

[Handwritten signature]

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MEMBERS HAVING
OTHER RECOMMENDATIONS:

[Handwritten signature]

 CHAIRMAN

AMENDMENT

OFFERED IN THE SENATE:

BY: Senate HESS
203

TO: SB 203 SENATE BILL No. _____

HOUSE BILL No. _____

PAGE: 1

LINE: 10 - 13

- 1) delete all of section 3 of the bill, lines 10 through 13
- 2) change section 2 of the bill to section 1
- 3) change section 3 of the bill to section 2
- 4) change section 4 of the bill to section 3

17,870,127
- 3,570,127
14,300,000

Introduced: 2/23/81
Referred: Health, Education &
Social Services and Finance

Funding Information
General Fund \$17,870,127
Other Funds -0-
\$17,870,127
14,300,000

BY THE RULES COMMITTEE BY
REQUEST OF THE GOVERNOR

1 IN THE SENATE

2 SENATE BILL NO. 203

3 IN THE LEGISLATURE OF THE STATE OF ALASKA

4 TWELFTH LEGISLATURE - FIRST SESSION

5 A BILL

6 For an Act entitled: "An Act making supplemental appropriations to the
7 Department of Education; and providing for an effective
8 date."

9 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF ALASKA:

10 * Section 1. The sum of \$3,570,127 is appropriated from the general fund
11 to the Department of Education, Postsecondary Education Commission, for the
12 purpose of repaying a loan borrowed from the Student Loan Marketing Association.
13 tion.

14 * Sec. 2. The sum of \$9,800,000 is appropriated from the general fund to
15 the Department of Education, financial support, for the purpose of local
16 debt retirement under AS 43.18.100.

17 * Sec. 3. The sum of \$4,500,000 is appropriated from the general fund to
18 the Department of Education for the Foundation program.

19 * Sec. 4. This Act takes effect immediately in accordance with AS 01.10.
20 070(c).

21 Bill Miles

22
23
24
25
26
27 \$ Steve Hole

S

B

2

11

COMMITTEE REPORT

SENATE

FURTHER: Finance

2/24/81

Date: _____

Mr. President:

The Committee on HEALTH, EDUCATION & SOCIAL SERVICES has had SB 211

making a special appropriation for construction of a school at Sand Point

under consideration and (a majority of the committee) (the committee) reports it back with the following recommendations:

- do pass do not pass
- do pass with attached amendments(s)
- replace with CS for _____ same title
- new title
- and recommends _____
- AND attaches a "Letter of Intent" New Fiscal Note
- reports it back without recommendation
- referred to the _____ Committee

MEMBERS SIGNING
DO PASS

[Handwritten signature]

[Handwritten signature]

MEMBERS HAVING
OTHER RECOMMENDATIONS:

[Handwritten signature]

[Handwritten signature]

 CHAIRMAN

PLEASE NOTE: THE FOLLOWING PAGES WERE TREATED
AS A UNIT IN THE ORIGINAL DOCUMENT

SAND POINT SCHOOL

SB 211

Alaska State Legislature



SENATOR
BOB MULCAHY
REPRESENTING
THE ALEUTIAN CHAIN,
KODIAK ISLAND
AND THE PRIBILOF ISLANDS

HOME ADDRESS
P.O. BOX 246
KODIAK, ALASKA 99813
(907) 486-3561

DURING SESSION
POUCH V
JUNEAU, ALASKA 99811

State Senate

March 2, 1981

TO: Senator Charles Parr, Chairman
Senate Health, Education and Social Services Committee

FROM: Senator Bob Mulcahy

RE: SB 211, "An Act making a special appropriation for
construction of a school at Sand Point", for
\$8,000,000.

Enclosed is the back up information for the above bill.

Funding Information
General Fund \$8,000,000
Other Funds -0-
\$8,000,000

Introduced: 2/24/81
Referred: Health, Education &
Social Services and Finance

1 IN THE SENATE

BY MULCAHY

2 SENATE BILL NO. 211

3 IN THE LEGISLATURE OF THE STATE OF ALASKA

4 TWELFTH LEGISLATURE - FIRST SESSION

5 A BILL

6 For an Act entitled: "An Act making a special appropriation for construction
7 of a school at Sand Point; and providing for an effec-
8 tive date."

9 BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF ALASKA:

10 * Section 1. The sum of \$8,000,000 is appropriated from the general fund
11 for payment as a grant to the City of Sand Point for construction of a
12 school.

13 * Sec. 2. The appropriation made by this Act shall be disbursed in
14 accordance with AS 37.05.315.

15 * Sec. 3. This Act takes effect immediately in accordance with AS 01.10.-
16 070(c).

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REVISED STUDY

for

NEW ELEMENTARY-SECONDARY
EDUCATIONAL COMPLEX

for

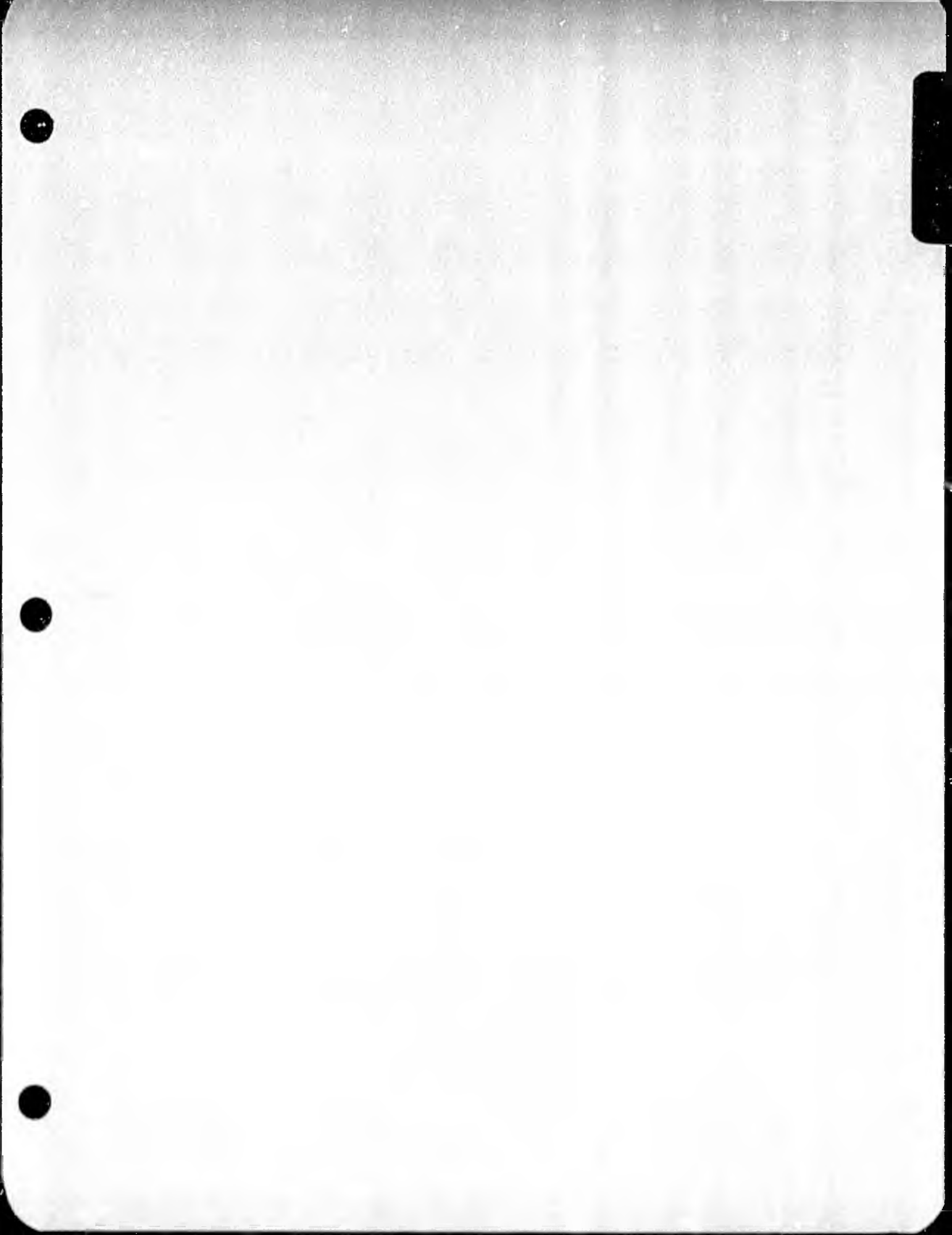
CITY OF SAND POINT,
ALASKA

January 23, 1981

Prepared by,
LANE + KNORR + PLUNKETT
Architects & Planners
800 Cordova, Suite 201
Anchorage, Alaska 99501
(907) 276-4939

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STUDY FOR A NEW ELEMENTARY SECONDARY EDUCATIONAL COMPLEX FOR THE
CITY OF SAND POINT, ALASKA.

ABSTRACT

The existing educational facility is inadequate for present and future needs. The facilities included are below the minimum guidelines of the State of Alaska Department of Education, the Department of Transportation and Public Facilities and the requirements of the Molly Hootch Case Decree. Furthermore, the 4 acre site is substandard and will not readily accept an addition sufficient to handle present or future needs of the rapidly growing Sand Point population.

The existing facility does not meet many elements of current Life Safety Codes, Handicapped Statutes and Guidelines, Energy Guidelines and Uniform Building, Mechanical and Electrical Codes. The building is poorly organized, inefficient, difficult to heat and costly to maintain.

It is the desire of the City of Sand Point to construct a new educational complex located either to the north of the existing community or as an alternative between the developing airport center and the existing community adjacent to the boat harbor. Land in the amount of 25 acres would be dedicated for a long range development for the school site to accommodate a twenty to thirty year growth period. The site size is commensurate with DOE Guidelines. The facility would be approximately 37,000 square feet as required by DOE/DOT Standards. The project cost of this facility, to be opened in September, 1983 based on funding in 1981 would be \$8,000,000 complete. The school, once completed, would house 182 students and would accommodate probable growth until a first addition could be completed.

The facility would reduce operation and maintenance costs by 10% on a per capita student basis and fuel consumption by 44% on a per square foot comparison with the existing facility.

FEASIBILITY STUDY FOR NEW ELEMENTARY SECONDARY EDUCATIONAL COMPLEX AT
SAND POINT, ALASKA

Introduction

The following is an investigation of long range, medium range and short range needs for academic, multi-purpose, resource and administrative education space for the City of Sand Point. The study is based on projections and revisions to those projections of the 1977 Comprehensive Plan prepared for the City of Sand Point by Bomhoff and Associates.

Due to the 200 mile limit and other economic factors, population trends of Sand Point and the economic growth for the community have already exceeded the 1985 population, economic forecast, and educational enrollment patterns. The current population for Sand Point is in excess of 770 persons. The school enrollment for all pupils of school age in Sand Point is currently in excess of 153. This is a 25% growth pattern over and above that predicted for the 1979-80 school year in the Comprehensive Plan completed in 1977.

New plans in the community and current construction underway include eleven units of family housing under the HUD Mutual Help Program, one nine-unit apartment building, a six-unit apartment building and an additional six-unit townhouse project. Since completion of the 1977 plan, an additional twelve units of apartments have also been erected within the town proper.

These trends and a 2.5 million dollar road and water supply improvements, a new deep water port about to be constructed, and the infusion of permanent year-around families for the growing crab and bottom fish industries indicate that the 1983 population could exceed 900 persons with a school population in excess of 200 pupils from grades K through 12.

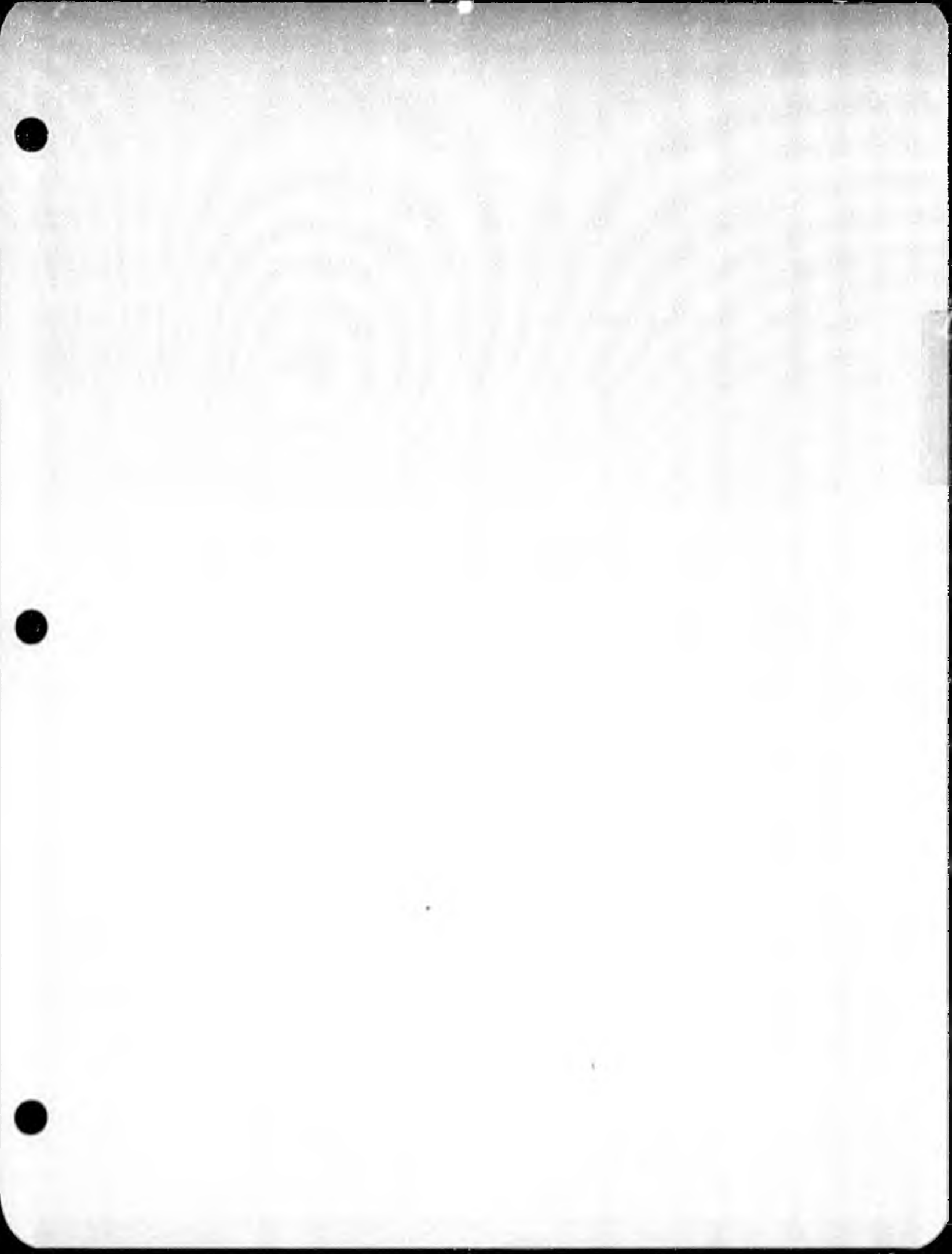
The existing school site, including available city land immediately surrounding the site, provides only four acres of land of which approximately 20% has a slope in excess of 15% and is too steep for playground or educational facilities.

The existing facility does not meet handicap standards and is deficient in many aspects of the Uniform Building Code and Department of Education's recommended educational standards as well as the minimum requirements of the Consent Decree of the Molly Hootch Case.

This study will include population projections based on economic forecast, statistical data, and current growth trends. Also included is a forecast of student population projections based on estimated growth. Alternative sites and utility development costs have been proposed to properly project overall project costs. A survey of code, energy, maintenance and planning deficiencies of existing facilities has been completed. A detailed list of code compliance requirements is included in the Appendices.

The Department of Education program requirements have been tabulated for the existing school enrollment as well as for facilities of various growth increments through 300 total students.

A recommended first increment is included with future increments depending on rate of growth. Detailed design requirements and layouts should be developed once funding limits have been established, and topographic and soils information have been obtained for the site selected.



POPULATION AND HOUSING GROWTH SINCE 1977

The 1977 permanent population at Sand Point was 535. The 1979 permanent population was 773. Transient population increased from 90 to 100 in the same period.

The current population exceeds the highest growth projection of the 1977 plan by 73 persons or 10% above the high projection and 15% above the "most probable" projection.

This growth can be evidenced by the increase in housing starts and the anticipated starts and pre-sales for next year. Housing vacancies are non-existent.

An aerial count of new construction was conducted utilizing late 1976 aerial photography and 1979 photos. A total of 10 new single family homes have been constructed. Five mobile homes have been added. A four-plex and a nine-plex have been constructed and are occupied. The total development is then 28 units for a population capacity of 118.

Presently under construction are a six-plex and a nine-unit apartment building. Eleven units of HUD financed, single-family homes are scheduled for completion late in 1980. An additional six-plex and a six-unit townhouse are also scheduled for construction. This will add 42 additional units with a population capacity of approximately 188.

The combination of what has been constructed and what is envisioned will only handle 306 additional residents which is consistent with the 238 population growth evidenced since completion of the comprehensive plan. All units are either presold or pre-rented and therefore represent current housing deficiencies and need. The current household average of 3.8 suggests overcrowding which the current construction program will help alleviate. The construction will not accommodate future growth however.

POPULATION PROJECTIONS

Short range, medium range and long range population projections have been prepared using three techniques. The simplest and most straight forward has been the linear extension of the growth rate since 1976. The second involves a projection statistically based on a consistent rate of change of rate of growth (i.e. acceleration) since 1920. The third involves a thorough analysis of all factors which influence population growth in Sand Point, industrial economic growth, ratio of basic to secondary employment, family size, and number of persons per job in the community.

A total growth projection through the year 2000 has been developed with a "most probable" middle path being identified. It is interesting to note that two of the three methods yield a similar long range projection for the "most probable" projection.

The results can be justified by the following factors:

1. Sand Point's location is well suited.
2. \$12,000,000 annual bottom fish harvest in the area will develop.
3. Oil exploration will commence within the 20-year time frame.
4. Adequate buildable land is available.
5. Sufficient water supply exists.
6. Adequate deep water port facilities exist and will be expanded.
7. Airport is sufficient for growth.
8. Development is not unlike growth of other Alaskan communities which are geographically unlimited (e.g. Anchorage, Wasilla)
9. Renewable energy sources are available to supplement fossil fuels (wind, mini hydro); geothermal sources are located on adjacent mainland.
10. Bottom fisheries will attract year-around residents to replace transient cannery workers.

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11. Sand Point will continue to be a transshipment point for Unga Island, Nelson Lagoon, Port Moeller and Squaw Harbor.
12. Gold and mining operations will redevelop on Unga Island in 1980, with 250 people expected to be involved in initial development operations.
13. A Borough may be formed with Sand Point as the economic, transportation and Government Center.

METHODS:

A. Straight Line Projections

The accompanying charts illustrate low, probable low, most probable, probable high and high growth trends based on 1976 - 79 actual growth. School enrollment projections have been based on a low of 20% of the population and a high of 25% of the population with a "most probable" of 23% of the population projected. The 20% figure has been applied to the low growth estimates which is consistent with the current trend in Sand Point. Sudden high growth tends to indicate relocation of single people and couples with or without preschool age children. There is a slight lag between growth and school population increase.

B. Rate of Increase Projection Method

The accompanying charts illustrate population and school age children projections based on an extension of the rate of increase in population. Such projections are only applicable where economics, utilities, geographic and land availability do not preclude growth. Sand Point is such a city. Other similar Alaska community growth patterns are included in Appendix C. An analysis of the rate of rise of the Rate of Increase on 20-year intervals is included for comparison and justification of method.

Two examples of rate of rise correlations in Sand Point are the boat harbor expansion and subsequent housing market growth. The boat harbor expansion from approximately 88 slips (transient berths not included) to 128 between 1977 and 1979 provided 45.45% additional permanent boat moorage. During that same period the population increased from 529 to 773, an increase of 46.12%.

The housing stock by the end of 1980 will have increased by 70 units over the 1976 count of 128 plus two permanent units in the motel or 130. This represents a projected increase of 53.8%. This is based on 12 units of multi-family housing being added for which construction has not started. Failure to commence these units will result in further overcrowding and a housing shortage.

Such statistics compare with the minimum school enrollment projections based on population growth through 1979 only. The projected increase of school age children at 46.12% would eventually increase the school enrollment from the 1976 mark of 133 to 194. This is consistent with the 202 - 205 projection based on no future growth in the community.

Given the fact that the Sand Point community has a strong economic base, what then are the primary factors which will prohibit population growth? There is favorable justification for the argument that community growth will be stifled and restrained by the lack of available facilities. The shortage of economic base related facilities, in this case boat moorage, restrained the short range growth of the community. Failure to provide adequate housing will further inhibit growth, as will the failure to keep up with the demand for adequate educational facilities. In time, lack of health, commercial, and recreational facilities will detract from natural growth based on an increased economic base. Land availability, utility development, and transportation facilities must also keep up with growth to encourage settlement consistent with the economic potential.

The rate of increase projections assume the land, utilities, and facilities will in fact keep up with growth and will not inhibit long range development. The rate also assumes a rate of increase of economic resources consistent with the patterns developed since 1920.

The method used for the projections is as follows:

1. The rate of increase is calculated for each 20 year period in community history. For Sand Point these rates are as follows:

1920 - 1940	100%	(50 - 100 persons)
1940 - 1960	150%	(100 - 250 persons)
1960 - 1980	250%	(250 - 900 persons) estimated

2. The rate of increase from one twenty year period to the next is computed. For Sand Point these rates are:

100 - 150%	+ 50%
150 - 260%	+ 110%

3. The change in rate of increase is then projected for the year 2000. For Sand Point this would be an additional 60% to 170% for a total increase of 420% for a total population of 4,680 persons for the year 2000. This compares with the highest projections using the straight line method. Annual increases are then computed logarithmically.
4. A 10% and 20% deviation is then used to compute the yearly low, probable low, probable high and highest projections.
5. Percentage of school children is then calculated similar to the straight line method using a range of 20% to 25% of the population.

C. Economic Base Growth Projections

This method takes a known economic potential and bases the population projection on several rates of attaining that economic potential. The method incorporates the following variables:

1. Ratio of resource to basic jobs. For Sand Point this is \$3,275,000 for 100 basic jobs or \$32,250 per job based on 1977 Comprehensive Plan figures.
2. Ratio of basic jobs to secondary jobs. A range is used with the 1976 ratio of .33 as a low figure and the Alaska maximum of 1.0 as the high figure. The most probable is the mid range of values indicated.
3. Ratio of jobs to population. The current 4.7 figure is used as a maximum. The 3.6 figure recommended in the 1977 Comprehensive Plan is included as the most probable. A 3.0 minimum is used to offset the range of possibilities.
4. Numbers of people per household.
The current average of 3.8 is considered the high range. The low range is placed at 3.0 as estimated in the comprehensive plan. A 3.4 mid range has been selected as most probable as Sand Point is probably not going to attract a very large single or retired population for some time.
5. Ratio of school children to population. The range of 20% - 25% is used with 23% as the most probable. This is based on the widely variable recent population to student ratio as follows:

	<u>Ratio</u>	<u>Percentage</u>
1971 - 1972	360/125	34.7%
1972 - 1973	420/133	31.6%
1973 - 1974	450/132	29.3%
1974 - 1975	475/130	27.3%
1975 - 1976	500/140	28.0%
1976 - 1977	529/132	
1977 - 1978	600/139	23.1%
1978 - 1979	690/126	18.2%
1979 - 1980	773/155	20.5%

The 1978-1979 statistic is atypical due to the one year relocation or drop-out of 8 of 18 tenth grade students. These students re-entered the school in the eleventh grade a year later.

Although the decrease reflects the general decline in the number of children it is far more drastic than national averages. This is due to the rapid growth in an isolated community. This growth tends to attract young couples without children or without school age children. The increase to 23% of the population is beginning to be evidenced by the higher number of kindergarten (18), (11 the year before), preschool (13) and 3 year olds (17) who will be starting school in the next few years. As with the straight line method, the higher ratios have been applied to higher growth rates.

The economic forecast is based on the \$12,000,000 annual sustained yield bottom fish projection of the 1977 Comprehensive Plan. Escalated to 1980 the value is as follows at 10% escalation per year.

<u>Date</u>	<u>Value</u>
1976	\$12,000,000
1977	\$13,200,000
1978	\$14,520,000
1979	\$15,970,000
1980	\$17,460,000

The ratio of resource to jobs projected to 1980 is as follows at 10% escalation.

<u>Date</u>	<u>Value</u>
1976	\$32,000
1977	\$35,200
1978	\$38,700
1979	\$42,600
1980	\$46,900 or \$47,000

To determine the number of jobs and subsequent population increase, the most probable growth has been projected based on the assumption that the sustained yield for bottom fish in the Sand Point area will be gradually reached by the year 2000. The growth is projected logarithmically. The probable low and probable high figures represent growth 10% lower or higher and the low and high figures represent growth 20% lower or higher. The highest growth rate assumes the sustained yield will be reached in 16 years. The lowest growth assumes the yield would be reached in 24 years.

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This variation allows for an underestimation of the yield or the percentage of the total yield which will filter through Sand Point. Conversely, the increased projections allow for increase in yield or introduction of new economic base elements such as oil and gas exploration, mineral development, tourism and agriculture.

SAND POINT
POPULATION GROWTH PROJECTIONS

METHOD A: STRAIGHT LINE

STRAIGHT LINE PROJECTION

YEAR	ACTUAL	1977 ESTIMATES			STRAIGHT LINE PROJECTION				
		ORIGINAL PROJ. LOW	MOST PROBABLE	HIGH	LOW	PROBABLE LOW	MOST PROBABLE	PROBABLE HIGH	HIGH
1976	495								
1977	529								
1978	650								
1979	773	620	675	700					
1980		650	700	725	850	875	900	925	950
1981		655	715	755	925	975	1,025	1,075	1,125
1982		660	730	785	1,000	1,075	1,150	1,225	1,300
1983		665	745	815	1,075	1,175	1,275	1,375	1,475
1984		670	760	845	1,150	1,275	1,420	1,525	1,650
1985		675	775	875	1,225	1,375	1,525	1,675	1,825
1986		683	786	900	1,300	1,475	1,650	1,825	2,000
1987		691	797	925	1,375	1,575	1,775	1,975	2,175
1988		699	808	950	1,450	1,675	1,900	2,125	2,350
1989		707	819	975	1,525	1,775	2,025	2,275	2,525
1990		715	830	1,000	1,600	1,875	2,150	2,425	2,700
1991					1,675	1,975	2,275	2,575	2,875
1992					1,750	2,075	2,400	2,725	3,050
1993					1,825	2,175	2,525	2,875	3,225
1994					1,900	2,275	2,650	3,025	3,400
1995					1,975	2,375	2,775	3,175	3,575
1996					2,050	2,475	2,800	3,325	3,750
1997					2,125	2,575	3,025	3,475	3,925
1998					2,200	2,675	3,150	3,625	4,100
1999					2,275	2,775	3,275	3,775	4,275
2000					2,356	2,875	3,400	3,925	4,450
Rate Increase Per Year (Persons)					75	100	125	150	175

SAND POINT
 POPULATION GROWTH PROJECTIONS
 METHOD B: RATE OF INCREASE

R A T E O F I N C R E A S E

YEAR	ACTUAL	1977 ESTIMATES			R A T E O F I N C R E A S E				
		ORIGINAL PROJ. LOW	MOST PROBABLE	HIGH	LOW	PROBABLE LOW	MOST PROBABLE	PROBABLE HIGH	HIGH
1976	495								
1977	529								
1978	650								
1979	773	620	675	700					
1980		650	700	725	720	810	900	990	1,080
1981		655	715	755	784	882	980	1,078	1,176
1982		660	730	785	840	945	1,050	1,155	1,260
1983		665	745	815	920	1,035	1,150	1,265	1,380
1984		670	760	845	1,000	1,125	1,250	1,357	1,500
1985		675	775	875	1,088	1,224	1,360	1,496	1,632
1986		683	766	900	1,180	1,327	1,475	1,622	1,770
1987		691	797	925	1,280	1,440	1,600	1,760	1,920
1988		699	808	950	1,380	1,552	1,725	1,897	2,070
1989		707	819	975	1,480	1,665	1,850	2,035	2,220
1990		715	830	1,000	1,620	1,822	2,025	2,227	2,430
1991					1,768	1,989	2,210	2,431	2,652
1992					1,928	2,169	2,410	2,651	2,892
1993					2,120	2,385	2,650	2,915	3,180
1994					2,340	2,632	2,925	3,217	3,510
1995					2,620	2,947	3,275	3,602	3,930
1996					2,780	3,127	3,475	3,822	4,170
1997					2,960	3,300	3,700	4,147	4,440
1998					3,140	3,532	3,925	4,317	4,710
1999					3,368	3,789	4,210	4,621	5,052
2000					3,744	4,212	4,680	5,148	5,616
Deviation					-20%	-10%	+10%	+20%	

SAND POINT

POPULATION PROJECTIONS

METHOD C - ECONOMIC GROWTH BASE

SUMMARY OF BASIS FOR CALCULATION

	Low	Probable Low	Most Probable	Probable High	High
Economic Base Increase in % 1980 - 2000	-20%	-10%	0	+10%	+20%
Total Economic Base Increase 1980 dollars	13,968,000	15,714,000	17,410,000	19,206,000	20,952,000
Average Value/Basic Job	47,500	47,500	47,500	47,500	47,500
Increase in Total Jobs To Year 2000	294	330	367	404	445
Ratio Basic/Secondary Employment	.33	.50	.67	.75	1.0
Total Employment Increase In Year 2000	396	445	611	707	882
Ratio Jobs/Population	3.0	3.3	3.6	4.0	4.7
Total Increase Population/ Year 2000	1,188	1,468	2,199	2,828	4,168
1979 Population	773	773	773	773	773
1980 Population (Est.)	875	888	900	912	925
TOTAL Population (Year 2000)	2,065	2,356	3,099	3,740	5,085

SAND POINT
POPULATION GROWTH PROJECTS

METHOD C: Economic Growth Base

ECONOMIC GROWTH BASE

YEAR	ACTUAL	1977 ESTIMATES			ECONOMIC GROWTH BASE				
		ORIGINAL PROJ. LOW	MOST PROBABLE	HIGH	LOW	PROBABLE LOW	MOST PROBABLE	PROBABLE HIGH	HIGH
1976	495								
1977	529								
1978	650								
1979	773	620	675	700					
1980		650	700	725	875	888	900	912	925
1981		655	715	755	900	920	950	980	1,025
1982		660	730	785	925	960	1,000	1,050	1,125
1983		665	745	815	950	1,000	1,050	1,125	1,230
1984		670	760	845	990	1,025	1,100	1,200	1,325
1985		675	775	875	1,010	1,075	1,180	1,275	1,450
1986		683	786	900	1,050	1,115	1,225	1,350	1,575
1987		691	797	925	1,100	1,150	1,300	1,480	1,700
1988		699	808	950	1,140	1,210	1,375	1,570	1,850
1989		707	819	975	1,180	1,275	1,475	1,690	2,000
1990		715	830	1,000	1,225	1,320	1,550	1,800	2,200
1991					1,300	1,400	1,675	1,950	2,375
1992					1,350	1,490	1,800	2,100	2,600
1993					1,425	1,575	1,925	2,250	2,875
1994					1,510	1,700	2,100	2,475	3,225
1995					1,650	1,810	2,280	2,725	3,550
1996					1,700	1,900	2,400	2,880	3,750
1997					1,790	1,990	2,550	3,050	4,000
1998					1,850	2,090	2,675	3,210	4,250
1999					1,980	2,225	2,900	3,600	4,690
2000					2,063	2,356	3,099	3,740	5,085

% Deviation

-20 %

- 0 %

+10 %

+20 %

SUMMARY OF ADVANTAGES AND DISADVANTAGES OF METHODS EMPLOYED

A. Straight Line

Although based on existing data, growth is not correlated to economic base or history of growth of similar communities in the State. It does not reflect the logarithmic redistribution nature of population growth.

B. Rate of Rise

This method does not concern itself with anything but statistical comparisons with previous community growth and growth in other similar areas. It is dependent on economic growth in the same acceleration as its prior community development which in turn requires additional economic resources to be developed once a sustained yield in an existing resource is reached. It overlooks short term lack of facilities to provide growth but is dependent on long term facilities sufficient to sustain economic growth. It is logarithmically projected and is therefore consistent with actual growth patterns.

C. Economic Base

This method is by far the most rational basis. It is limited only to the foreseeable economic basis and trends. It cannot be based on non-existent or undiscovered resources. It is logarithmic. It makes assumptions regarding time necessary to develop a sustained yield of the resource. It is therefore a conservative forecast.

D. Recommendations

The Economic Base Method should be used to predicate short range school population growth. As new resources are developed or existing ones reach a sustained yield or are exhausted, the projections should be revised using similar techniques.

The Rate of Rise Method is best used for long range (20 years and up) possibilities. It should be used to identify potential and to make long range plans. Thus, the school site should be sized to handle the eventuality of 1000 to 1100 students. The school should have potential for expansion to accommodate this growth or a policy should be made as to the maximum size for any one building or facility.

SAND POINT SCHOOL ENROLLMENT

<u>YEAR</u>	<u>TOTALS</u>	
1968-1969	72	(elementary only)
1969-1970	88	(elementary only)
1970-1971	98	(elementary only)
1971-1972	125	
1972-1973	133	
1973-1974	132	
1974-1975	130	
1975-1976	140	

School Age Population Projections

Method: A - STRAIGHT LINE PROJECTION

STRAIGHT LINE PROJECTION

Year	ACTUAL	1977 PROJECTIONS	MINIMUM CONSIDERING NO GROWTH	LOW POPULATION GROWTH	PROBABLE LOW	MOST PROBABLE	PROBABLE HIGH	HIGH POPULATION GROWTH
1976	133	132						
1977	139	133						
1978	126	135						
1979	155	136						
1980	155	125	157	171	177	183	191	199
1981		129	154	178	192	207	222	237
1982			157	194	214	235	258	281
1983			161	210	225	258	270	325
1984			166	225	258	304	330	368
1985			171	241	280	326	366	412
1986			173	257	302	350	402	456
1987			183	273	324	379	438	500
1988			190	288	346	408	474	543
1989			195	304	368	437	510	587
1990			202	320	386	465	546	631
1991			207	336	412	494	582	675
1992				351	434	523	618	718
1993				367	456	552	654	762
1994				383	478	580	690	806
1995				399	500	609	726	850
1996				414	522	638	762	893
1997				430	544	667	798	937
1998				446	566	695	834	981
1999				462	588	724	846	1,025
2000				477	610	753	906	1,068
± School Age				21%	22%	23%	24%	25%

School Age Population Projections

Method: B - RATE OF INCREASE

RATE OF INCREASE

Year	ACTUAL	1977 PROJECTIONS	RATE OF INCREASE					
			MINIMUM CONSIDERING NO GROWTH	LOW POPULATION GROWTH	PROBABLE LOW	MOST PROBABLE	PROBABLE HIGH	HIGH POPULATION GROWTH
1976	133	132						
1977	139	133						
1978	126	135						
1979	155	136						
1980	155	125	157	159	161	189	216	246
1981		129	154	162	188	207	237	270
1982			157	164	194	225	258	294
1983			161	176	207	241	277	315
1984			166	193	227	264	303	345
1985			171	210	247	287	325	375
1986			173	228	269	312	359	408
1987			183	247	291	339	389	442
1988			190	268	316	368	422	480
1989			195	289	314	396	455	517
1990			202	310	366	425	488	555
1991			207	340	400	465	534	607
1992				371	437	508	583	663
1993				404	477	554	636	723
1994				445	524	609	699	795
1995				491	579	672	772	877
1996				550	648	753	864	982
1997				583	687	799	917	1,042
1998				621	726	851	995	1,110
1999				659	777	902	1,036	1,177
2000				707	833	968	1,111	1,263
% School Age				21%	22%	23%	24%	25%

SCHOOL AGE POPULATION PROJECTIONS

METHOD C: ECONOMIC GROWTH BASE

ECONOMIC GROWTH BASE

YEAR	ACTUAL	1977 PROJ.	MINIMUM CONSIDERING NO GROWTH.	LOW POPULATION GROWTH	PROBABLE LOW	MOST PROBABLE	PROBABLE HIGH	HIGH POPULATION GROWTH
1976	133	132						
1977	139	133						
1978	126	135						
1979	155	136						
1980	155	125	157	183	195	207	219	231
1981		129	154	189	202	218	235	256
1982			157	194	211	230	252	281
1983			161	199	220	241	270	307
1984			166	207	225	253	288	331
1985			171	212	236	264	306	362
1986			173	220	245	281	324	393
1987			183	231	253	299	355	425
1988			190	239	266	316	376	462
1989			195	247	280	339	405	500
1990			202	257	290	372	432	550
1991			207	273	308	385	468	593
1992				283	327	414	504	650
1993				299	346	442	540	718
1994				317	374	483	594	806
1995				346	398	524	654	887
1996				357	418	552	691	937
1997				375	437	586	732	1,000
1998				388	459	615	770	1,062
1999				415	489	667	864	1,172
2000				433	518	712	897	1,271
o School Age				210	220	230	240	250

Current School Enrollment and Projections Based on No Additional Growth

The attached table illustrates the total school age children in Sand Point by grade since 1976 as well as the total enrollment figures listed in the Comprehensive Plan. The additional figures represent the projected school growth based on no change in current population structure. The city pre school figures of 13, 4-year olds and 17, 3-year olds and the present jump to 18 kindergarten pupils were used to determine the average of 16 new school students in each grade each year. These figures exceed the 1977 plan estimates. This is consistent with the 1977 Comprehensive Plan which stated 25% of the population consisted of school age (5 - 18) children. The 1979 percentage is 20%. This decline is viewed as temporary. This is caused by the sudden population increase consisting of young couples with pre school youngsters or who have recently or will soon have children. The statistics show a relatively small change in families with children in other grades.

The long range timetable for growth in school enrollment without additional growth in the community is shown on the tables. A total enrollment of 205 to 210 should be envisioned by 1990. This would require a 37,000 square foot facility with 25,000 square feet of assignable space and a 15 to 25 acre site. The present facility contains only 13,351 assignable square feet. Its specific deficiencies are outlined in the existing facility section of this report. These requirements should be construed as absolute minimums based on no additional community growth.

SAND POINT SCHOOL ENROLLMENT

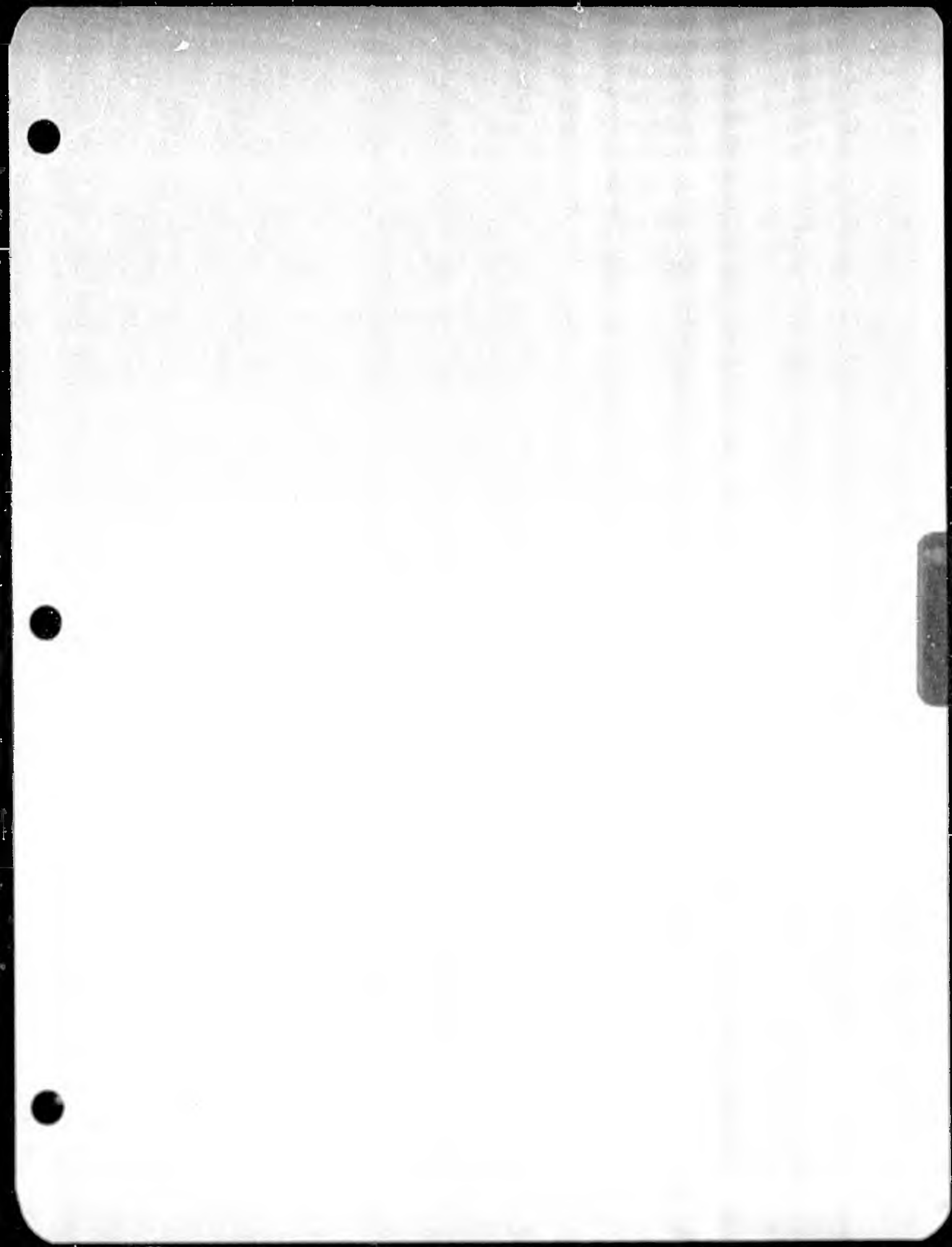
<u>GRADE</u>	1976-77		1977-78		1978-79		1979-80	
	<u>EST.</u>	<u>ACTUAL</u>	<u>EST.</u>	<u>ACTUAL</u>	<u>EST.</u>	<u>ACTUAL</u>	<u>EST.</u>	<u>ACTUAL</u>
K		11		6		8		18
1		7		9		9		11
2		7		7		10		9
3		11		6		8		11
4		9		13		5		9
5		9		10		11		6
6		11		11		8		14
7		11		11		11		11
8		19		13		11		11
9		7		18		12		12
10		17		11		10		13
11		11		17		8		19
12		3		7		15		11
<u>TOTAL</u>	132	133	133	139	135	126	136	155

SAND POINT SCHOOL ENROLLMENT GROWTH THROUGH 1992 ASSUMING NO FURTHER POPULATION INCREASE

<u>GRADE</u>	<u>1977</u>	<u>1980-81</u>	<u>1977</u>	<u>1981-82</u>	<u>1982-83</u>	<u>1983-84</u>
K	EST.	13	EST.	16	16	16
1		18		13	16	16
2		11		18	13	16
3		9		11	18	13
4		11		9	11	18
5		9		11	9	11
6		6		9	11	9
7		14		6	11	11
8		11		14	6	9
9		17		11	14	6
10		12		11	11	14
11		13		12	11	11
12		19		13	12	11
<hr/>						
TOTAL	125	157	129	154	157	161

SAND POINT SCHOOL ENROLLMENT GROWTH THROUGH 1991-92 ASSUMING NO FURTHER POPULATION GROWTH

<u>GRADE</u>	<u>1984-85</u>	<u>1985-86</u>	<u>1986-87</u>	<u>1987-88</u>	<u>1988-89</u>	<u>1989-90</u>	<u>1990-91</u>	<u>1991-92</u>
K	16	16	16	16	16	16	16	16
1	16	16	16	16	16	16	16	16
2	16	16	16	16	16	16	16	16
3	16	16	16	16	16	16	16	16
4	13	16	16	16	16	16	16	16
5	18	13	16	16	16	16	16	16
6	11	18	13	16	16	16	16	16
7	9	11	18	13	16	16	16	16
8	11	9	11	18	13	16	16	16
9	9	11	9	11	18	13	16	16
10	6	9	11	9	11	18	13	16
11	14	6	9	11	9	11	18	16
12	11	14	6	9	11	9	11	18
<hr/>								
TOTAL	166	171	173	183	190	195	202	207



RECOMMENDED SCHOOL SIZE

Based on population projections and availability schedules, the following alternative design possibilities appear most realistic.

Scheme I: 202 Students

Design of a 202 student elementary-secondary school would provide for long range (1990) needs only, providing no further growth was evident in the community. It would not satisfy projected growth needs through 1990 unless the growth rate was extremely low in which it would suffice until 1984 for the "probable low" projection. In short, it would probably be obsolete once it was constructed.

Scheme II: 222 Students

Design of a 222 student elementary-secondary school would provide for long range needs through 1986 only if the lowest growth rate occurred. It would provide for the long range need to the year 2000 only if no additional growth takes place in Sand Point. It will provide for "most probable" growth only through the first year of occupancy. The "fast track" scheduling would be necessary to complete an addition in time to prevent drastic overcrowding. It would provide for only lowest population growth projections through 1986, and allow for a reasonable time for construction of a first addition. The "probable low" projection of 220 students in 1983 indicates a "fast track" planning schedule would also be necessary to avoid overcrowding. Growth rates beyond "most probable" could not be handled and if such growth took place, the facility would be obsolete prior to occupancy.

Scheme III: 242 Students

This scheme provides for "most probable" growth through 1983-1984. If funded by direct appropriation the first addition would be complete by fall of 1984 thereby obviating any overcrowding. "Fast track" planning could be used if growth exceeded the "most probable". Occupancy for the first addition would then occur in September 1983 and would result in a slightly overcrowded condition (10 students) for the 1982-83 school year. For the highest population growth the scheme would be obsolete at completion of the first increment. Such extreme growth to 1025 total persons in Sand Point in 1981 (an increase of 250 or 35%

RECOMMENDED SCHOOL SIZE (continued)

of the population) would be immediately recognized in 1980, in time to supplement the design and project budget to accommodate such growth.

It is recommended Scheme I be selected. It provides the flexibility for the short range growth within reasonable funding restraints. The Scheme will require careful monitoring of growth in preschool age children in Sand Point as well as overall population increase trends.

A large increase in population in Sand Point will mean a large jump in school children two to four years later. Similarly, a large expansion in services, facilities such as boat moorage or industrial growth should be anticipated in sufficient time to program funds. This will allow school construction to keep up with or remain slightly ahead of student population.

Recommended Concept for Development

The long range plan for the facility should have a basic layout capable of a student population of at least 750 and preferably 1000 students. Ample space for parking, playgrounds, and athletic fields should be included for such growth.

The eventual population could be divided into several buildings or could be one complex with several "pods" connected to a multipurpose "core" facility for administration, gymnasium and other shared facilities.

A plan with four academic areas should be considered. They could be divided into the following basic age groups:

Primary K - 2
Elementary 3 - 6 or 3 - 5
Junior High 7 - 9 or 6 - 8
Senior High 10 - 12 or 9 - 12

Each would be capable of eventually handling approximately 250 students. Each could expand independently of the others. Two media centers would be developed, one for all secondary and one for all elementary students. These facilities and other shared facilities such as special education classrooms could be located between the groups served.

Administrative spaces could be located convenient to public entry and in a fashion to allow for expansion independent of various school groups.

SCHEDULING AND PHASING

To determine an appropriate first increment of construction it must first be determined the minimum time necessary to construct the new school and the first addition thereafter. The initial facility size would then be planned for the number of students anticipated up to the completion of the first addition. Three schedules follow. The first presumes a bond issue for each increment. The second assumes a direct appropriation from the 1980 legislature for the initial increment and the first addition. The third presumes a direct appropriation with the "fast-track" approach to planning, design, and bidding of the first addition. This last method would be utilized only in the cases where growth occurred so rapidly it became necessary to plan the first addition prior to occupancy of the initial increment.

Schedule for 1981 Funding:

1. Latest Schedule For Initial Increment
Feasibility completion, December 1, 1979.
Submit for funding, January 1980.
Obtain approval for funding, 1981 Legislative Session.

Complete Design, February 1982.
Open Bids, March 1982.
Award Contract, April 1982.
Complete construction, April 1983.
Move in, May - June 1983.
First session occupancy, September 1983.

2. Earliest Schedule for Completion of First Addition
Complete feasibility for addition, December 1983.
Submit for funding, January 1984.
Obtain approval for funding, 1984 Legislative Session.

Complete design, February 1985.
Open Bids, March 1985
Award Contract, April 1985
Complete Construction, December 1985 - March 1986
Move in - May - June 1986
First session occupancy, 1986 - 1987 school year

SAND POINT COST ESTIMATES

A. Previous estimates.

Estimates for similar facilities are as follows:

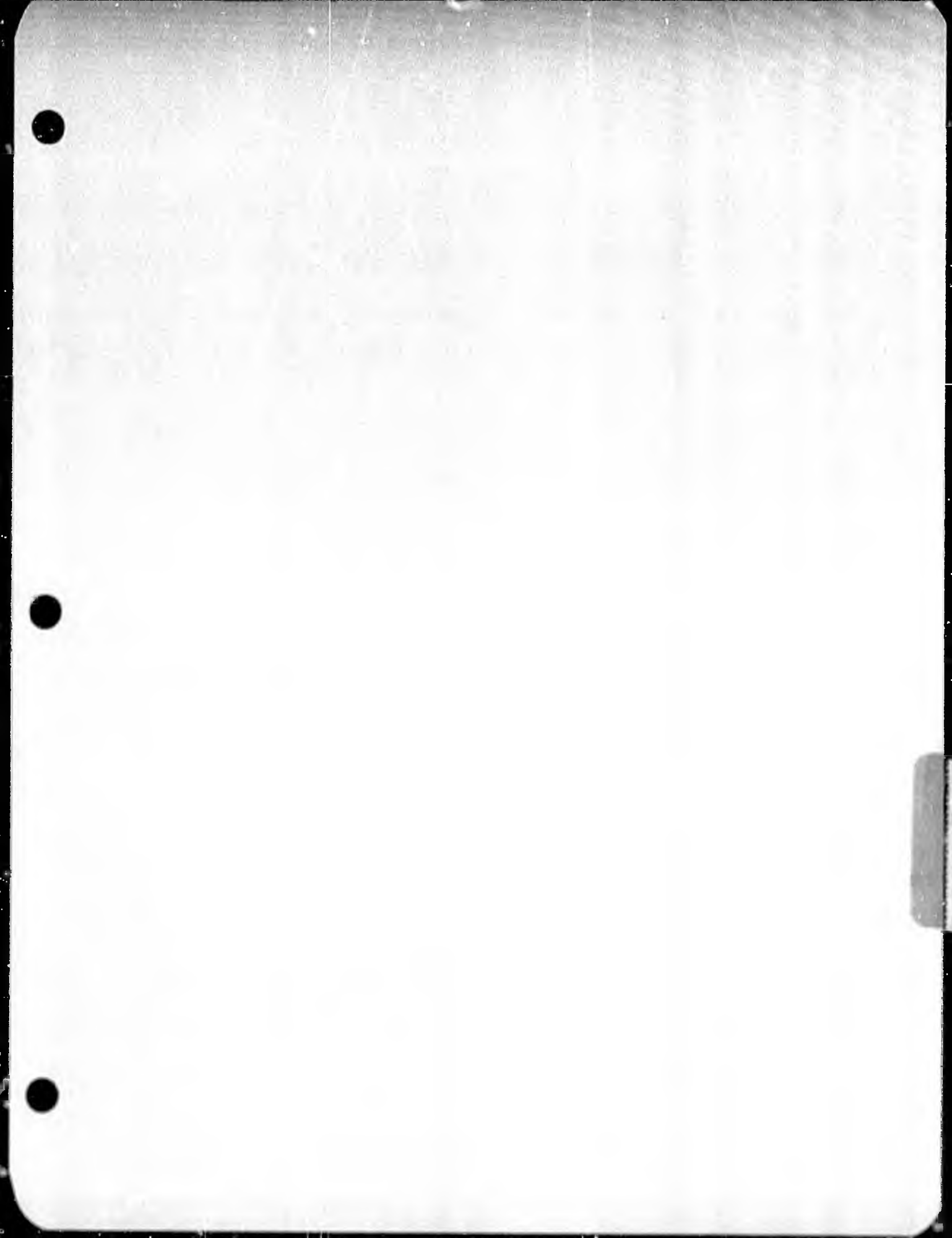
	Funded	Proj. Cost	Built	Size	Const. Cost	Const. Cost/SF	Project Cost/SF
1. Unalaska School Additions	1979	\$ 3,500,000	1981	18,500	\$3,000,000	\$162.00	\$190.00
2. Adak School Add.	1978	1,400,000	1979	6,716	1,000,000	149.00	208.00
3. Adak Fish & Wildlife Hdots.	1979		1980	10,000	2,300,000	230.00	Unknown
4. Larson Bay School (Kodiak)	1978	1,637,100	1979	10,000	1,247,000	130.00	163.70
5. Ouzinkie School (Kodiak)	1978	1,001,000	1979	7,500	1,064,000 (Bid)	145.00	Unknown
6. Wasilla School Addition	1977		1980	60,000	5,400,000	90.00	Unknown
7. Bush School Average	1978		1979	8,000		183.88	210.00

B. Projected estimates escalated for comparison to year of construction at Sand Point

1. Unalaska	1979	\$ 3,850,000	1981	18,500	\$3,300,000	\$178.00	\$209.00	
2. Adak School Additions	1978	1,694,000	1981	6,716	1,211,000	181.00	230.00	
3. Sand Point Scheme I	a.	1981	\$9,647,202	1982	37,875	\$7,192,500	\$180.00	\$254.71
	b.	1981	10,611,922	1983	37,875	7,987,500	200.00	280.18
	c.	1982	11,573,214	1984	37,875	8,786,250	220.00	308.20
	d.	1982	12,840,425	1985	37,875	9,664,275	242.00	339.02
Scheme II	a.	1981	10,516,890	1982	41,625	7,867,500	180.00	252.70
	b.	1981	11,570,779	1983	41,625	8,737,500	200.00	277.98
	c.	1982	12,727,857	1984	41,625	9,611,250	220.00	305.77
	d.	1982	14,000,643	1985	41,625	10,572,375	242.00	336.25
Scheme III	a.	198	11,430,232	198	45,375	8,542,500	180.00	251.36
	b.	198	12,573,255	198	45,375	9,487,500	200.00	277.10
	c.	1982	13,930,581	198	45,375	10,436,250	220.00	304.21
	d.	1982	15,213,639	198	45,375	11,479,875	242.00	335.25

SAND POINT COST ESTIMATES

Scheme IV		<u>Project Cost</u>	<u>Built</u>	<u>Size</u>	<u>Const. Cost</u>	<u>Const. Cost</u> <u>per Sq. Ft.</u>	<u>Project Cost</u> <u>per Sq. Ft.</u>
a.	1981	9,000,000	1982	32,000	5,900,000	184.37	250.00
b.	1981	9,800,000	1983	32,000	6,489,000	202.80	275.00
c.	1982	9,680,000	1984	32,000	7,138,000	223.08	302.50
d.	1982	10,648,000	1985	32,000	7,852,000	245.38	332.75



SAND POINT COST ESTIMATES

C. Estimate Rationale

On the positive side, Sand Point has adequate construction activity underway to potentially minimize mobilization costs. It has some lodging space but little food service. Some equipment exists for earthwork, hauling, etc. Transportation facilities are adequate for barge or air service. Warehousing space is marginal to adequate. Borrow pits for coarse and fine aggregate are available for earthwork and sand for concrete is available. A considerable amount of other construction work is underway and large contractors are mobilized.

On the negative side, the local labor force is minimal and is principally limited to carpenters and laborers. Adequate food and lodging may not be available thereby requiring a contractor to set up a camp for his crews. Utility extensions will be costly and will add to the square foot price of the buildings. (The Adak and Unalaska school projects had minimal utility work involved).

The Adak School price is considered extremely good compared with other work in the area such as the Fish and Wildlife Headquarters Project. As good as it was, however, projecting it to the 1981 construction season correlates it favorably with the Unalaska estimate which was originally based on a 1979 construction season and may be underestimated for that area for 1980 construction.

The high project cost projections for Sand Point are based on the format and regulations required by the DOT/DOE grant process. Beginning with a \$180 per square foot construction cost and a \$375,000 utility development cost, the grant application then requires a 12% initial construction contingency regardless of project size. To this must be added a 10% equipment allowance and 5% for art work. These mark ups total 22% when applied in accordance with the formula. The remainder of the total mark up of 34% is to cover DOE/DOT costs (3%) additional project contingencies, design, inspection, soils work, surveys and project administration costs.

A preliminary grant application budget has been prepared for each scheme, following DOTPF regulations.

APPENDIX "B"
GRANT PROJECT BUDGET

CRITERION: Facility Procurement
REGION: SH

PROJECT NAME AND LOCATION: Sand Point School, Sand Point, Alaska

PROJECT NO:

FUNDING:	\$	(A/C:)	Base	Totaling	(Agency Use)
(Source)	\$	(A/C:)	Grantee:		
	\$	(A/C:)	Prepared by		
	\$	(A/C:)	Submitted by		
Total Funding:	\$		DOT/FF		
			Agency Commission		
			Financial Review Officer		
			Division Director		
			Grant Agency		
			Approving Agency		

Facility Type: 45,375 square feet new facility to house 242 elementary & secondary students including offices, storage, restrooms, corridor areas.

FINANCIAL DESCRIPTION:	ACTV. Code:	GRANT	ACTV. Code:	F.O.T./P.C.	APPROX. TIME	REMARKS
0-LAND:	Total	\$ 0		\$ 0	\$ 0	
Appraisals	07A					
Acquisition	07B					
Legal Expense	07L					
Payroll	07P					
Travel	07T					
Contingency	07C					
1-SITE INVESTIGATION:	Total	\$ 27,825		\$ 0	\$ 27,825	
Soils Information	17K	15,000				Test hole & soils report.
Land Surveyors	17L	10,000				Boundary, topo & existing landmarks.
Payroll	17P					3 trips @ \$500 each.
Inspection	17I					
Travel	17T	1,500				
Water Survey	17W					
Contingency	17C	1,325				5%
2-OTHER SERVICES:	Total	\$ 50,230		\$ 5,922	\$ 44,308	
Archaeological Study	27A					
Design Review	27C			5,840		3 reviews levels 2 & 4
Cost Control	27E					
Program Consultant	27K					
Work of Art	27Q	14,390				0.5% Construction Cost per AS
Contingency	27C	1,392		282		5%
3-DESIGN SERVICE:	Total	\$ 623,758		\$ 0	\$ 623,758	
Additional Services	37A	1,000				Master Plan and project survey
Sub-Consultants	37C	1,000				Cost Consultant
Fees	37F	471,758				A/E 6%
Office Expense	37J					
Payroll-In. Acc. Org.	37P					
Reimbursable Expense	37R	1,000				Reproduction, printing, travel
Travel-In. Acc. Org.	37T					16 trips @ \$500 each
Contingency	37C	22,292				5%
4-ADMINISTRATION:	Total	\$ 3,160		\$ 124,564	\$ 127,724	
Cost of Sales Charge	47A			124,564		.007% of funding
Office Expense	47J	1,000				24 months @ \$125
Payroll	47P	1,000				.002% of funding
Travel	47T	1,000				1 trip Sand Point to Anchorage
Contingency	47C	160				5%
5-DESIGN DESIGN:	Total	\$ 0		\$ 70,910	\$ 70,910	
Office Expense	57J			70,910		.005% of funding
Payroll	57P					
Travel	57T					DM (15 days) 3 reviews (Arch, 5 days + Mech/Elec, 4 days each, Const. 4 days, Final Insp. + Elec, 3 days)
Contingency	57C			1,160		1%
6-CONSTRUCTION PM:	Total	\$ 77,700		\$ 24,720	\$ 102,420	
Special Consultants	67C					DOT/FF Insp. 24 days, 1 trip/mo. @ \$4 mo.
Office Expense	67J			24,720		Asst. 14 days, clerical
Payroll	67P	41,000		14,100		Inspector 12 mo. @ \$4,000
Travel	67T	16,700		1,000		32 trips @ \$500 each. } Grantee
Contingency	67C	1,000		1,160		1%
7-EQUIPMENT:	Total	\$ 114,750		\$ 0	\$ 114,750	10% Bldg. Cost
8-CONTRACT:	Total	\$ 9,547,000		\$ 0	\$ 9,547,000	
Construction	87C					
P.M.S.	87E					
Construction Inv	87F	1,100,000				
UTILITY SERVICES		175,000				
Contingency	87C	1,000,000				1% Construction Cost
9-TOTAL RESTRICTED AND UNRESTRICTED:	Total	\$ 10,218,733		\$ 124,564	\$ 10,343,297	
						1% of funding
						.001% of funding
PROJECT TOTAL		\$ 10,218,733		\$ 124,564	\$ 10,343,297	

APPENDIX "B"
GRANT PROJECT BUDGET

DIVISION: Facility Procurement
REGION: SW

78-727
NOV 40
LOCATION: Sand Point School, Sand Point, Alaska

PROJECT NO:

FUNDING:	\$	(A/C:	Date	Totals	Unexp. Amt.
(source)	\$	(A/C:			Grantee:
	\$	(A/C:			Prepared by
	\$	(A/C:			Approved by
Total Funding:	\$				00777

Facility Type: 41,625 square feet new facility to house 222
Elementary & secondary students including offices, storage,
classrooms, service and corridor areas

FUNCTIONAL DESCRIPTION:	ACTY. Code:	GRANT	ACTY. Code:	A.O.T. P.S.	UNEXP. AMT.	REMARKS
0-LAND:	Total	\$ 0		\$ 0	\$ 0	
Appraisals	07A					
Acquisition	07B					
Legal Expense	07L					
Payroll	07P					
Travel	07T					
Contingency	07C					
1-SITE INVESTIGATION:	Total	\$ 27,828		\$ 0	\$ 27,828	
Soils Investigation	17K	18,000				Test hole & soils report
Land Surveys	17L	10,000				Boundary, topo & existing landmarks.
Payroll	17P					
Inspection	17Q					
Travel	17T	1,500				3 trips @ \$500 each
Water Survey	17W					
Contingency	17C	1,328				
2-OTHER SERVICES:	Total	\$ 41,305		\$ 8,922	\$ 47,227	
Architectural Study	27A			8,922		3 reviews - levels 2 & 4
Design Advice	27C					
Cost Control	27E					
Program Consultant	27K					0.5% construction cost per AS
Work of Art	27Q	10,318				
Contingency	27C	1,367		183		
3-DESIGN SERVICES:	Total	\$ 218,450		\$ 0	\$ 218,450	
Professional Services	37A	1,000				Master Plan, pre-let survey, cost consultant
Sub-consultants	37C	4,000				A/E
Fees	37F	173,000				
Office Expense	37J					
Payroll - In. Ass. Deg.	37P					
Miscellaneous Expense	37S	4,000				Printing reproduction, travel (6 @ \$500 each)
Travel - In. Ass. Deg.	37T					
Contingency	37C	18,000				
4-ADMINISTRATION:	Total	\$ 1,260		\$ 118,000	\$ 119,260	
Sup. & Admin. Charge	47A			118,000		0078 of funding
Office Expense	47J	200				24 months @ \$25
Payroll	47P	1,000				0025 of funding
Travel	47T					1 trip Sand Point to Anchorage
Contingency	47C	160				
5-OPERATION:	Total	\$ 0		\$ 65,058	\$ 65,058	
Office Expense	57A					COST of funding
Payroll	57P					0.5% (15 da.) 2 reviews (Arch. 3 da. + Mech. 4 da. + Elect. 4 da. Const. 4 da.) Final Insp. & Elect. 15 days
Travel	57T					
Contingency	57C			1,000		
6-CONSTRUCTION (BY OTHER AGENCY):	Total	\$ 77,700		\$ 24,720	\$ 102,420	
General Construction	67C					007777 Insp. 24 da. 1 trip/mo x 14
Office Expense	67J					
Payroll	67P	48,000				Assist. 14 da. + clerical
Travel	67T	28,000				Inspector 12 mo. @ \$4,000
Contingency	67C	1,700				22 trips @ \$500 each. } Grantee
7-INSURANCE:	Total	\$ 149,220		\$ 1	\$ 149,221	10% Bldg. Cost
8-OTHER SPECIAL:	Total	\$ 8,111,000		\$ 1	\$ 8,111,001	
Construction	87C					12% Construction Cost
P.R.S.	87B					
Construction Law	87D	7,400,000				
Special Services	87E	711,000				
Contingency	87C	88,000				
93-TOTAL RESTRICTED FUND:		\$ 10,227,680		\$ 210,415	\$ 10,438,095	10 Project Funding
94-TOTAL UNRESTRICTED FUND:				\$ 8,922	\$ 8,922	00777 @ 0.001% of funding
TOTAL:		\$ 10,227,680		\$ 219,337	\$ 10,447,017	

Sandpoint School Sand Point, Alaska

Project Name:	37,875 square feet new facility to house 202 Elementary & Secondary students including offices, storage, restrooms, service & loading areas
Location:	
Contract No.:	
Contract Date:	
Contract Value:	
Contract Type:	
Contract Status:	
Contract Description:	
Contract Documents:	
Contract Conditions:	
Contract Terms:	
Contract Notes:	

Item	Quantity	Unit	Unit Price	Total Price	Notes
Site Preparation	0		0	0	
Site Clearing	0		0	0	
Site Grading	0		0	0	
Site Erosion Control	0		0	0	
Site Investigation	27,825	sq ft	0	27,825	
Test hole & soils report	10,000	sq ft			Test hole & soils report
Boundary, topo & exist. landmarks	1,500	sq ft			Boundary, topo & exist. landmarks
3 trips @ \$500 each	1,325	sq ft			3 trips @ \$500 each
5%					5%
Site Investigation	30,975	sq ft			
1 review-level @ 2(4)	29,500	sq ft			1 review-level @ 2(4)
0.5% Construction cost per A/E	1,475	sq ft			0.5% Construction cost per A/E
5%					5%
Site Investigation	422,140	sq ft			
Master Plan, Project Survey	411,000	sq ft			Master Plan, Project Survey
Cost Consultant					Cost Consultant
A/E					A/E
Reproduction, printing, travel					Reproduction, printing, travel
(6 trips @ \$500 ea.)					(6 trips @ \$500 ea.)
5%					5%
Site Investigation	20,140	sq ft			
0.075 of funding	1,300	sq ft			0.075 of funding
1 trip Sand Point to Anch.					1 trip Sand Point to Anch.
0.057 of funding					0.057 of funding
1M 15 da, 2 Reviews (Arch 5 da)					1M 15 da, 2 Reviews (Arch 5 da)
Final Insp. 15 da, 15 da, const 1 da					Final Insp. 15 da, 15 da, const 1 da
Site Investigation	77,700	sq ft		102,430	
10% Bldg. Cost	68,750	sq ft			10% Bldg. Cost
12% Construction Cost	33,680	sq ft			12% Construction Cost
33 project funding	275,000	sq ft			33 project funding
10% Bldg. Cost	247,500	sq ft			10% Bldg. Cost
12% Construction Cost	208,000	sq ft			12% Construction Cost
33 project funding	720,000	sq ft			33 project funding
10% Bldg. Cost	648,000	sq ft			10% Bldg. Cost
12% Construction Cost	544,000	sq ft			12% Construction Cost
33 project funding	1,740,000	sq ft			33 project funding
10% Bldg. Cost	1,566,000	sq ft			10% Bldg. Cost
12% Construction Cost	1,312,000	sq ft			12% Construction Cost
33 project funding	4,280,000	sq ft			33 project funding

C. Scheme II : 41,265 square feet/222 students

<u>Element</u>	<u>Cost</u>	<u>Bldg. Size</u>	<u>Cost/SF/YR</u>	<u>Student Population</u>	<u>Cost Student/YR</u>	<u>Difference/ Present</u>
Insurance	\$41,265	41,265	\$1.00	222	\$185.87	
Fuel Oil	\$31,361	41,265	\$0.76	222	\$141.26	
Electricity	\$64,786	41,265	\$1.57	222	\$291.82	
Water/Sewer	\$ 4,126	41,265	\$0.10	222	\$ 18.58	
Telephone	\$ 4,951	41,265	\$0.12	222	\$ 22.20	
Janitorial	\$37,138	41,265	\$0.90	222	\$167.28	
Bldg. Maintenance	\$23,108	41,265	\$0.56	222	\$104.09	
<hr/>						
TOTAL	\$206,735	41,265	\$5.01	222	\$931.10	
ROUND OFF	\$210,000	41,265	\$5.05	222	\$935.00	\$80.00/ student

D. Scheme III : 45,375 square feet/242 students

<u>Element</u>	<u>Cost</u>	<u>Bldg. Size</u>	<u>Cost/SF/YR</u>	<u>Student Population</u>	<u>Cost Student/YR</u>	<u>Difference/ Present</u>
Insurance	\$45,515	45,375	\$1.00	242	\$187.50	
Fuel Oil	\$34,485	45,375	\$0.76	242	\$142.50	
Electricity	\$71,238	45,375	\$1.57	242	\$294.37	
Water/Sewer	\$ 4,537	45,375	\$0.10	242	\$ 18.74	
Telephone	\$ 5,445	45,375	\$0.12	242	\$ 22.50	
Janitorial	\$40,837	45,375	\$0.90	242	\$168.74	
Bldg. Maintenance	\$25,410	45,375	\$0.56	242	\$105.00	
<hr/>						
TOTAL	\$227,467	45,375	\$5.01	242	\$939.25	
ROUND OFF	\$230,000	45,375	\$5.05	242	\$940.00	\$65.00/ student

5. Scheme IV: 32,000 square feet, 182 students.

<u>Element</u>	<u>Cost</u>	<u>Bldg. Size</u>	<u>Cost/SF/YR</u>	<u>Student Population</u>	<u>Cost Student/YR</u>	<u>Difference/ Present</u>
Insurance	\$32,000	32,000	\$1.00	182	\$175.00	
Fuel Oil	\$24,320	32,000	\$0.76	182	\$133.62	
Electricity	\$50,240	32,000	\$1.57	182	\$278.79	
Water/Sewer	\$3,200	32,000	\$0.10	182	\$17.50	
Telephone	\$3,840		\$0.12	182	\$21.09	
Janitorial (est.)	\$28,900	32,000	\$0.90 (est.)	182	\$58.24	
Bldg. Maintenance (est.)	\$16,000	32,000	\$0.50 (est.)	182	\$67.91	
TOTAL	\$159,000	32,000	\$4.95	182	\$872.15	
ROUND OFF	\$160,000	32,000	\$4.95	182	\$875.00	\$130.00/ student