

ALPHA TESTS - 989-7

2183 HCRB - HB 339 - HB 377

MATANUSKA-SUSITNA BOROUGH SCHOOL DISTRICT
P.O. BOX 78
PALMER, AK 99645

ITEM FOR BOARD INFORMATION

BOARD MEETING DATE: March 28, 1983
MEMORANDUM NUMBER: 82-142
SUBJECT: Alpine Alternatives
FROM: Jean Goodwin, Director of Elementary
Education

EXPLANATION:

Attached is information which was requested concerning the Matanuska-Susitna Handicapped Winter Sports Program which has been carried out with the assistance of Alpine Alternatives, an Anchorage-based organization. The bulk of the effort and hours of hard work to carry out this program has been borne by Lucy Hope and Jim Davis, special education teachers at Iditarod, with assistance from Mary Pomeroy, physical therapist.

The attached information is a proposal which outlines the cost of continuing the program with and without the help of Alpine Alternatives. At this point in time the staff of Alpine Alternatives are optimistic about funding for next year but there is no guarantee. It should be emphasized that the equipment included in the proposal would be used to add downhill ski training to the cross-country component already in place as a result of intensive fundraising activities and volunteer work. As the program expands, Lucy and Jim do not feel that they will be able to continue this work. The part-time coordinator would assume this responsibility.

Since no funds are budgeted, there is a need to request funding from the Borough, or perhaps from the Legislature, if the program is to continue. The amount of money needed is contingent on continued funding for Alpine Alternatives. It is at this time the only sports program in which these students participate, and at the same time it provides them with a life-long leisure activity. While other activities are open to them, in reality their participation is extremely limited.

MAT-SU HANDICAPPED WINTER SPORTS
PROGRAM

For the past two years, students from the Mat-Su School District have been participating in a sports instructional program offered by Alpine Alternatives. Alpine Alternatives is a non-profit organization formed in 1980, to offer downhill ski instruction to moderately and severely handicapped individuals. They since have expanded to include cross-country skiing, ice skating, and several outdoor summer sports such as hiking and canoeing. The director of Alpine Alternatives, Marty Decker, approached self-contained teachers and physical therapist in fall of 1981 to offer their winter sports instruction to our students, and we have been participating in the program for the past two years, at no cost to ourselves, the students, or the school district.

At this time, we see great value in the winter sports program and would like to see it continued and expanded for next year. Since Alpine Alternatives is partially funded by the Municipality of Anchorage, we would like to ask that the Mat-Su Borough appropriate some funds to support our athletes' continued participation in this program. We have projected 50 moderately and severely handicapped students to be involved in a Handicapped Winter Sports program for 1983-84 school year. Therefore, we have included 2 budgets, one if we would continue to work with Alpine Alternatives, and one if we were to run the program without Alpine Alternatives.

In looking at the cost for this program, it is important to realize that these students will never be involved in organized extra-curricular or school sponsored sports, due to the nature of their handicapping conditions. This winter sports program is their only opportunity for sports training.

Thank you for your time and consideration.

Lucy Hope
Jim Davis
Mary Pomeroy

Phone - 376 5371 days
Iditarod School, Wasilla

MAT-SU HANDICAPPED WINTER SPORTS PROGRAM

BUDGET

ITEM DESCRIPTION	COSTS		
	WITHOUT ALP.	ALT	WITH ALP. ALT.
<u>Professional Services</u>			
Mat-Su Coordinator/Instructor/Van Driver- at \$10.00/hour for 24 hours/wk for 12 weeks (December - March)	9600		9600
Instructors-8 instructors at \$8.00 for 12 hrs/ wk for 12 weeks	9216		no cost
<u>Equipment</u>			
Downhill skis \$50.00	25 pair 1250		10 pair 500
boots 50.00	1250		500
bindings 50.00	1250		500
poles 15.00	375		150
Ski bridges-adaptive ski aid 35.00	(6) 210		(4) 140
Arroya Ski Sled to be used for severely handicapped students to be provided by Alpine Alternatives. Cost of one of these is approx. \$1200.00			
Cross Country skis 50.00	5 pair 250		250
boots \$35.00	10 pair 350		350
poles \$7.00	8 pair 56		56
bindings \$10.00	5 pair 50		50
Other equipment needed can be provided by school ski supplies, and Special Olympics ski supply			
Ice Skates \$70.00	10 pair 700		700
Skate Aids- \$60.00	6 360		360
Skate Aids are an adaptive piece of equipment to provide support for handicapped skaters.			

Operating Expenses

Phone	200	100
Copying and Office Supplies	none	none
to be provided by schools		

Transportation

Trips to Anchorage to include: 2 hrs travel
2 hrs ski instr.
5 trips per week, 12 weeks 9600 9600

Trips to Hatcher Pass can be substituted
for trips to Anchorage; cost would be same

*Transportation so far has been provided by existing activity busses;
when available. This has worked out well for the limited program
we have been running. Hopefully it will continue to work out.

Rental and Facilities Use

Downhill Skiing- \$5.00/ lift ticket		
50 students for 12 weeks	3000	no cost
Cross Country Skiing- use of school fields and Hatcher Pass Touring Center	no cost	no cost
Ice Skating- Ben Boeke Rink \$90.00/hr		
1 hour/wk for 12 weeks	1080	no cost
School Rinks when available	no cost	no cost

<u>TOTAL</u>	\$38,797.00	\$22,856.00
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IN LIGHT OF THE COST DIFFERENCE, QUALITY INSTRUCTION, AND EXCELLENT SERVICES WE HAVE RECEIVED IN THE PAST TWO YEARS WITH ALPINE ALTERNATIVES, WE RECOMMEND THAT WE CONTINUE TO WORK WITH THIS ORGANIZATION IN THE FUTURE. HOWEVER, WE FEEL THAT WE SHOULD HELP TO REIMBURSE ALPINE ALTERNATIVES FOR THE COST OF THEIR SERVICES. WE ALSO RECOMMEND HIRING A COORDINATOR AS STATED IN THE FIRST BUDGET ITEM. AS MORE AND MORE STUDENTS MOVE TO THIS AREA, AND PROGRAMS ARE SPREAD THROUGHOUT THE DISTRICT, IT IS INCREASINGLY DIFFICULT FOR TEACHERS TO COORDINATE AND ORGANIZE WINTER SPORTS INSTRUCTION EFFECTIVELY.

MAT-SU PARTICIPANTS IN ALPINE ALTERNATIVES SPORTS INSTRUCTIONAL PROGRAM

1981-82

Self-contained classes at Iditarod Elementary.....14

Included mentally retarded, severely
learning disabled, emotionally disturbed
students

Self-contained class at Wasilla High..... 9

Severely learning disabled students

Orthopedically Handicapped students from

Sherrod, Swanson, Iditarod, WJH, Butte.....10

33

1982-83

Self-contained classes at Iditarod Elementary.....18

Included mentally retarded, emotionally
disturbed, autistic, severely learning
disabled, multiply handicapped, neur-
ologically impaired students

Orthopedically handicapped students from

Butte, Swanson, WJH, WHS, Iditarod.....12

30

Next year, we hope to include students in self-contained classrooms at Butte, WHS, and WJH. Any other students in the district with moderate and severe handicapping conditions would have this opportunity also.

DEPT. OF COMMUNITY & REGIONAL AFFAIRS

OFFICE OF THE COMMISSIONER

POUCH B
JUNEAU, ALASKA 99811
PHONE: (907) 465-4700

April 22, 1983

POSITION PAPER

RE: HB 339

SPONSOR: Representative Lacher

Program Effects of the Bill

This bill appropriates \$45,000 through the Department of Community and Regional Affairs to the Joseph P. Kennedy Foundation for the 1984 Special Olympics.

Comments

The Department feels that the Special Olympics is a worthwhile program and can administer the appropriation without additional administrative costs.



Mark Lewis, Commissioner

STATE OF ALASKA
FISCAL NOTE

Revision Date _____, 1983

I. REQUEST

Bill/Resolution No.: HB 339
 Title: Appropriation to JPKennedy Foundation
 Sponsor: Representative Lacher
 Requestor: House Community & Regional Affairs

II. FISCAL DETAIL

Agency Affected: Community & Regional Affairs
 Program Category Affected: development
 BRU, Program of Subprogram(s) Affected: _____

EXPENDITURES/REVENUES: (Thousands of Dollars)

	FY 83	FY 84	FY 85	FY 86	FY 87	FY 88
OPERATING						
100 PERSONAL SERVICES						
200 TRAVEL						
300 CONTRACTUAL						
400 COMMODITIES						
500 EQUIPMENT						
600 LAND & STRUCTURES						
700 GRANTS, CLAIMS, ETC						
TOTAL OPERATING		-0-	-0-	-0-	-0-	-0-
CAPITAL		-0-	-0-	-0-	-0-	-0-
REVENUE		-0-	-0-	-0-	-0-	-0-

FUNDING: (Thousands of Dollars)

GENERAL FUND						
FEDERAL FUNDS						
OTHER (Specify Source)						
		-0-	-0-	-0-	-0-	-0-

POSITIONS:

FULL-TIME						
PART-TIME						
TEMPORARY						

III. SOURCE OF FUNDS TO OFFSET FISCAL IMPACT OF BILL:

Sponsor did not indicate.

IV. ANALYSIS: Attach a separate page for any Analysis

Prepared By: Terry L. Earley Phone: 465-4730
 Division: Local Government Assistance Date: 4/22/83
 Approved by Commissioner: [Signature] Date: 4/22/83
 Department: Community & Regional Affairs

Distribution:

Original to Legislative Finance
 Copy to Office of Management and Budget (for Legislature introduced bills)
 Copy to Department (for Governor introduced bills)
 Copy to Sponsor
 Copy to Requestor (if different from Sponsor)

3/8/83

NOTE REGARDING THE FOLLOWING FRAME(S) ON MICROFILM:
COMPLETE DOCUMENT IS AVAILABLE IN ORIGINAL FILES.
TITLE PAGE ONLY HAS BEEN FILMED.

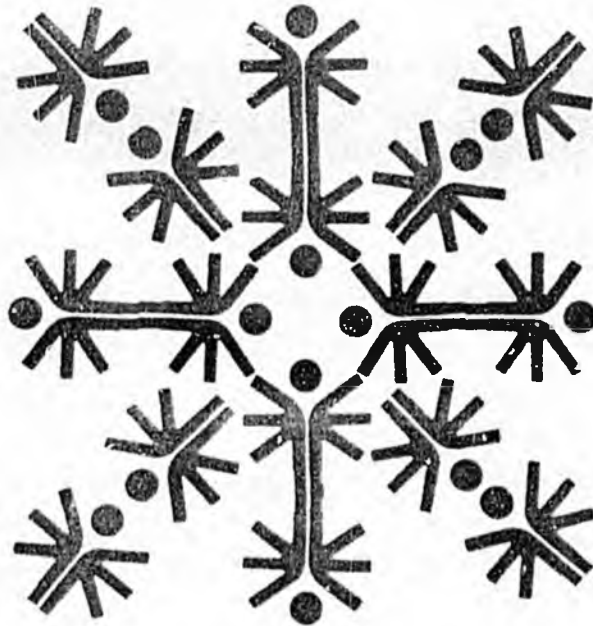


JUNEAU

ALASKA

1983 WINTER GAMES

SPECIAL OLYMPICS



**All who enter
Will go home winners-
In their own special way**

Created & Sponsored by the Joseph P. Kennedy, Jr.
Foundation

NOTE REGARDING THE FOLLOWING FRAME(S) ON MICROFILM:
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JUNE 11-14, 1982

WENDLER
JR. HIGH

ANCHORAGE,
ALASKA

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COMMITTEE REPORT

HOUSE

FINANCE

FURTHER:

(7)

4/18/83

Date: _____

Mr. Speaker:

The Committee on COMMUNITY & REGIONAL AFFAIRS has had HB 366

"An Act making special appropriations for payment as grants to the Cities of Wasilla and Palmer for senior citizen housing, and providing for an effective date."

under consideration and reports it back as follows:

- 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
- Zero Fiscal Note Attached
- reports it back without recommendation
- referred to the _____ Committee

MEMBERS SIGNING
DO PASS

MEMBERS HAVING
OTHER RECOMMENDATIONS:

CHAIRMAN

Alaska State Legislature



Barbara Loeber, Chairman
Mae Fischer, Vice-Chairman
Randy Phillips
Milo Fritz
Don Clocksin
Jack McBride
Mike Szymanski

Room 104
State Capitol
Juneau, Alaska 99811
Pouch V
Juneau, Alaska 99811

House of Representatives Committee on Community & Regional Affairs

TO: Committee on Community and Regional Affairs
FROM: Staff
DATE: May 2nd, 1983
RE: House Bill 366 - Senior Citizen Housing.

The Senior Housing Needs Assessment surveyed the Matanuska-Susitna Borough and identified the need for 32 units of senior housing located in Wasilla. Unfortunately, during FY'82-'83 only 18 of the 32 units were funded for planning and construction. Section 1 of HB 366 grants 1.4 million to the City of Wasilla for the construction of 14 units that experienced shortfall last fiscal year.

Section 2 of HB 366 appropriates \$100,000 as a grant to the City of Palmer for site preparation and design for senior citizen housing. The housing will be located in close proximity to the existing Palmer Senior Center in order to share infrastructures such as medical, recreational, and nutritional services. This concept of sharing services will bring a great savings to the state as well as to the Mat-Su Borough.

The teleconference is scheduled today in order to address state-wide senior citizen housing needs, in addition to the shortfalls experienced in the Mat-Su area.

STATE OF ALASKA

DEPT. OF COMMUNITY & REGIONAL AFFAIRS

DIVISION OF LOCAL GOVERNMENT ASSISTANCE

April 21, 1983

The Honorable Barbara Lacher
Attention: Eve Fox
Pouch V, Room 104
Juneau, Alaska 99801

Dear Representative Lacher:


RE SENIOR CITIZEN HOUSING DEVELOPMENT FUND

In response to a telephone request by Eve Fox of your staff to Dick Pryor of my staff, the attached data on the Senior Citizen Housing Development Fund is provided.

The Palmer and Wasilla Phase II projects are not included in these figures because we have not at this time received a grant application. When the initial grant application materials are received we will include the projects in our future funding projections.

I hope this information is adequate for your needs. If we can be of further assistance, please call us.

Sincerely,


Mark Lewis
Commissioner

cc: Ray Price
Dick Pryor

Attachments

Bill Sheffield, Governor

REPLY TO:

- POUCH 6H
JUNEAU, ALASKA 99811
(907) 465-4707
- 225 CORDOVA STREET, BLDG. B
ANCHORAGE, ALASKA 99501
(907) 264-2201
- P.O. BOX 348
BETHEL, ALASKA 99559
(907) 543-3475
- P.O. BOX 41
NOME, ALASKA 99762
(907) 443-5457
- P.O. BOX 280
KOTZEBUE, ALASKA 99752
(907) 442-3675
- 1514 CUSHMAN RM. 211
FAIRBANKS, ALASKA 99701
(907) 452-7126

SENIOR CITIZENS HOUSING DEVELOPMENT FUND

FUND STATUS

FY'82-83 APPROPRIATIONS	\$26,000,000
COMMITTED TO PROJECTS	<u>\$22,696,676</u>
AVAILABLE TO COMMIT	\$ 3,303,324

The \$22,696,676 is committed to the following projects:

ANCHORAGE	\$ 7,836,000
ANGOON	\$ 30,000
CHUGIAK/EAGLE RIVER	\$ 2,500,000
FAIRBANKS	\$ 4,052,176
HOMER	\$ 2,400,000
KENAI	\$ 1,066,000
KLAWOCK	\$ 30,000
KODIAK	\$ 52,500
NINILCHIK	\$ 500,000
PETERSBURG	\$ 50,000
SITKA	\$ 50,000
ST. PAUL	\$ 30,000
VALDEZ	\$ 1,500,000
WASILLA	\$ 1,600,000
WRANGELL	\$ 1,000,000
TOTAL	\$22,696,676

Projects in the planning and grant application process:

ANGOON	\$1,200,000
BARROW	\$1,600,000
DILLINGHAM	\$ 30,000
KLAWOCK	\$1,000,000
METLAKATLA	\$1,500,000
SITKA	\$1,800,000
ST. PAUL	\$1,400,000
ST. MARYS	<u>\$ 800,000</u>
TOTAL	\$9,330,000

If all these projects currently in the grant application process successfully complete their grant applications and require the full \$100,000/unit funding we will have a \$6,026,676 fund shortfall:

GRANT APPLICATIONS PENDING	\$9,330,000
FUNDS AVAILABLE	\$3,303,324
FUNDS SHORTFALL	\$6,026,676

SENIOR CITIZENS HOUSING DEVELOPMENT FUND
APRIL 21, 1983
PAGE 2 OF 2

If we receive the 2.5 million dollars requested in the FY'84 budget we could still have a \$3,526,676 shortfall.

CURRENT SHORTFALL	\$6,026,676
FY84 BUDGET REQUEST	-\$2,500,000
POSSIBLE SHORTFALL	\$3,526,676

We anticipate that all of the projects being planned may not successfully complete the grant application process and some may receive HUD funding thereby reducing the amount of state funding required. We therefore expect to have adequate funding to meet the needs of these projects.

KODIAK ISLAND BOROUGH

Telephones 486-5736 - 486-5737 — Box 1246

KODIAK, ALASKA 99615

April 14, 1983

File

Joseph Terry, President
Senior Citizens of Kodiak
Box 315
Kodiak, Alaska 99615

Dear Mr. Terry:

The Kodiak Island Borough Assembly at the regular meeting held Thursday, April 7, 1983 unanimously adopted Resolution No. 83-42-R supporting a multi-purpose senior citizens center in Kodiak. This project has been identified in the adopted Capital Improvement Program and is a definite need in the Kodiak area.

If you have any further questions regarding this matter, kindly contact me at your convenience.

Sincerely,

KODIAK ISLAND BOROUGH

Phil Shealy
Phil C. Shealy
Borough Manager

Enclosure (Res. 83-42-R)

mdd



CITY OF WASILLA

P. O. BOX 430
WASILLA, ALASKA 99687
PHONE: 376-5227

RESOLUTION NO. W83-F-1

A RESOLUTION OF THE CITY COUNCIL OF WASILLA, ALASKA, REQUESTING FUNDING FOR FOURTEEN (14) ADDITIONAL SENIOR HOUSING UNITS.

WHEREAS, the Senior Housing Needs Assessment surveyed the Matanuska-Susitna Borough and identified the need for thirty-two (32) units of senior housing to be located in Wasilla; and

WHEREAS, sufficient land has been acquired and a plan developed to accommodate thirty-two (32) units of housing, eighteen (18) to be built during 1983; and

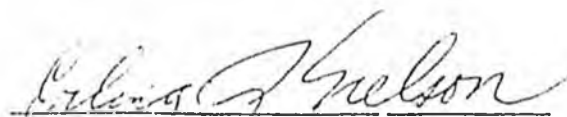
WHEREAS, the additional fourteen (14) units could be built more economically if built at the same time if funding is available;

NOW, THEREFORE, BE IT RESOLVED, that the City of Wasilla requests additional funding to complete the entire thirty-two (32) units during the 1983 construction season.


I certify that a resolution in substantially the above form was passed by a majority of those voting at a duly called and conducted meeting of the governing body of the City of Wasilla, this 28th day of March, 1983.


HAROLD S. NEWCOMB, Mayor

ATTEST:


ERLING P. NELSON, City Clerk

(SEAL)


376-5227

James Herzog
P.O. Box 78
Willow, Ak. 99688
March 22, 1983

MAR 28 1983

Re: Your letter of 3/14/83

Dear Barber Lacher;

Upon receiving and reading your letter of March 14th, I felt compelled to reply to some of your statements.

I feel that it is only natural for many of the newly elected officials to want to change some of the existing laws on the books. (Not that some of them are in need of a change.) However since the future status of the Permanent Fund Dividend Program will, in some way affect each and every resident of the state, as you stated, I feel that each and every one of us should have a say as to what changes should or should not be made.

Your Bill (HB164) causes me to think that you have formed your own opinion of this matter as you did in the recent matter in a local issue re: trapping and the setting of such traps in certain areas.

As an elected official, one needs to govern by the wishes of the people and not of ones own wishes.

You mention in your letter of the declining oil revenue. This alone should cause you to think of using any of this fund for Capital Projects even in what you call our local area. "The Projects are built", "The Oil Revenue is down", "Where, Just where is the money coming from to maintain these projects" **THINK THINK THINK.**

An example of this can be seen in my own home town, (\$700,000.00) to build a new community center (Free Grant Money) Free my Butt. Taxpayers, one way or the other. Maintaining and upkeep ??? For the once a year Willow Winter Carnaval.

No, I am sorry Barber, open your ears in Mat Sue Area and let the people Vote on this most important Issue. Then and maybe then, you will have my vote of a differant view.

I live here in the area and there is no way that the local government could have devided this money in a better way that so many of us could have benifited as we did this year. I say leave "Hands Off" of a good thing.

Thank you for your time;

Sincerely Yours ;

James Herzog
James Herzog

CC anch. Daily News
anch. Times
Valley Sun
Frontierman



Matanuska-Susitna Borough

BOX B, PALMER, ALASKA 99645 • PHONE 743-4801

DEPARTMENT OF ADMINISTRATION

March 14, 1983

MAR 16 1983

The Honorable Barbara Lacher
Alaska State Legislature
Pouch V
Juneau, Alaska 99811

Dear Barbara:

Subject: SENIOR CITIZEN HOUSING IN PALMER

Sarah asked us to give you a detailed account of possible financing for senior citizen housing in Palmer.

The attached letter to David Soulak describes a possible senior citizen housing project in Palmer.

In the past several days I have discussed a trade of land with persons at an intermediate administrative level within the University of Alaska, have discussed senior citizen financing with the U. S. Farmers Home Administration and have discussed with David Soulak, Palmer City Manager the idea of the City of Palmer acting as owner or sponsor of a senior citizen housing project.

From discussions with the foregoing persons, I believe that we have good reason to assume that:

1. The University of Alaska would be interested in a trade, particularly if the project were staged so that only the western 2.5 acres--the area next door to the Palmer Senior Center--were developed at the beginning so that the eastern 2.5 acres could continue to be used for plant experimentation with perennials already in the ground for a while longer.

2. The U. S. Farmers Home Administration has monies which can be made available for the project, but any application would probably have to be received by FmHA within the next 30 to 60 days before all available monies are committed to other projects.

3. The City of Palmer would probably be willing to be owner of congregate housing units. We will know this after the City Planning Commission looks at a rezoning of the parcel from R-1 to multi-family and after the City Council has reviewed David Soulak's proposal that the City act as sponsor and owner.

4. If there is a problem in obtaining funding for congregate type of facilities (such as a dining hall and recreation area) using just U. S. Farmers Home Administration monies, and if there are no state monies that can be obtained for this purpose from the State Senior Citizen Housing Program, the Palmer Senior Citizens Center, which is adjacent to the site, could probably satisfy many of the functions of a congregate housing facility. Specifically, the Palmer Senior Citizens facility could serve meals and could meet some of the recreational requirements of occupants of the units. The Palmer Senior Citizens, Inc. has plans for building an elevator that will provide easy access from the south to both floors of the building.

If U.S. Farmers Home Administration monies can be obtained for the project, an adequately funded State Senior Citizens Housing Program would still be important. Among other things, there may be a fairly tight limit on the amount FmHA will loan per unit, probably about \$60,000 per unit, which means that there may not be enough money in the project for congregate facilities for dining and recreation. To the extent that the U. S. FmHA monies are insufficient for congregate facilities, we would want to seek that money from the State. I do not think that we would have to wait for State monies before proceeding with the project, because we could probably make do with Palmer Senior Citizen facilities for an interim period of time.

The tenants would move into a U. S. Farmers Home Administration funded project on a somewhat different basis than they would move into the Pioneer's Home or, probably, other senior congregate housing in other parts of the State. The rules probably would be the same as housing being built by the City of Wrangell for Wrangell senior citizens, which is being funded by the U. S. Farmers Home Administration.

These are the rules:

1. If the cost of the housing is distributed equally among each of the tenants, then each tenant would have to pay, as a maximum, a little more than one-half of the rent for their unit as they would have to pay if the unit were a new unit just being put on the market for rental. The reason that the monthly payment would be so much lower than market rent is because the monthly mortgage payment is so very low, being based upon a 50 year term with 1% interest. This would result in much lower monthly payments than a 20 or 30 year mortgage with 12 or 13% interest.

2. There would be a second ceiling on how much each tenant would have to pay and that ceiling would be 25% of the tenant's gross annual income. In many cases the tenants' gross annual income would be the combined payments the husband and wife receive from social security so the maximum rent that they would have to pay would be 25% of what they are receiving each month as social security payments. The U. S. Farmers Home Administration

would make a rent subsidy payment to the City of Palmer to make up the difference between the rents that the tenant should be paying with the heavily subsidized mortgage and the rent that the tenant is actually paying based upon the 25% limitation on tenants' liability for rent payments. So, the City would come out whole even though some of the tenants may be paying very little each month for rent.

The combination of very low monthly mortgage payments and the ceiling on the monthly rent that each tenant must pay means that the units would be within the means of most older people on limited incomes.

A U. S. FmHA financed project owned by the City of Palmer should not be a burden on the City, because the project, if properly administered, would not result in the City having to contribute any monies. The U. S. Farmers Homes Administration allows the owner to incur certain management costs, usually somewhere between 5 to 7% of the gross rental revenues, plus certain other accounting and administrative costs as part of the rent for which the owner receives rent subsidies. So, the City should be able to hire such managerial, accounting and book-keeping assistance it needs to make the project work and to make sure that the City does not have to incur any liability with respect to the project.

So, to summarize, the State Senior Citizen Housing Program is a worthwhile program which should be of value to the Valley if funded, even though we may seek FmHA financing. In fact, the City of Palmer would probably submit two applications for (1) senior housing and (2) congregate facilities--one to FmHA for mortgage financing and rent subsidies and the other to the State for senior citizen housing. That way there would be a fall back position if one financing approach fell through.

Sincerely,



Gary Thurlow
Borough Manager

er

cc: Barbara Morse Quinn
Senior Citizen Housing CRA, Anchorage

Alaska State Legislature



Barbara Lacher, Chairman
Mac Tischer, Vice-Chairman
Randy Phillips
Milo Fritz
Don Clocksin
Jack McBride
Mike Szymanski

Room 104
State Capitol
Juneau, Alaska 99811

Pouch V
Juneau, Alaska 99811

House of Representatives Committee on Community & Regional Affairs

February 23, 1983

Commissioner Mark Lewis
Department of Community & Regional Affairs
Pouch B
Juneau, Alaska 99811

Dear Commissioner Lewis:

On February 17, 1983, I received a copy of the letter sent by you to Mr. John Curtis of the Alaska State Housing Authority stating that \$1.6 million had been reserved from the Senior Citizen Housing Development Fund for the development of 18 units of housing for the senior citizens of Wasilla. I was very pleased to be notified of this development.

There are an additional 14 units that have been identified in the Wasilla area, at a cost of \$1.4 million. In addition, other housing needs are being identified throughout the state that will have to be addressed by both the legislature and the Department. To this end, legislation is being drafted to assist in supplying funding for senior housing needs not only in the Mat-Su area, but throughout the state.

I am hopeful that you will be able to provide the same quality assistance for this new legislation as you, and your department, have provided regarding the Wasilla Senior Housing.

Sincerely,

A handwritten signature in cursive script that reads "Barbara Lacher".

Barbara Lacher
Representative
District 16

cc: Mr. John Curtis
Alaska State Housing Authority
Rep. Herrmann

MEMORANDUM

TO: Representative Adelheid Herrmann

FROM: Beth Robinson

DATE: February 23, 1983

SUBJECT: Senior Citizens Housing Development Fund

I spoke with Dick Pryor, Division of Housing Assistance, 272-4585, who told me about the FY84 budget for Senior Citizens Housing Development.

The division originally requested \$10 million which was reduced by the Sheffield Administration to \$2.5 million. There is \$3.659 million left over from their FY83 money, which, added to the \$2.5 million, gives them a total of \$6.159 available for housing construction. APIA's request will probably be for \$1.5 million (they are still in the planning stages and haven't submitted a grant proposal, yet). So far, the division has five applications pending, including APIA's. Added up, they total \$7.8 million, leaving a shortfall of \$1.64 million.

It's hard to predict how much money the program will need. Dillingham, Anchorage, or other communities may submit requests, putting further demands on the division's FY 84 budget. Or it could be that applicants will withdraw their proposals because of HUD Sec. 8 budget cuts. HUD rental subsidy money is needed in order for some projects to be feasible. Although the state builds the housing units, the operations and maintenance costs must be paid by the renters. Many, of course, can't afford it unless they receive federal rental subsidy.

I think it's fair to say there will probably be more demand than money available. Mr. Pryor said a tight budget makes planning difficult. People are hesitant to go through all the work of putting a project together if there's no money for construction.

In the case of Dillingham, the director of the Senior Center has requested information on the program. Mr. Pryor said if a proposal for Dillingham were to be submitted, it's his understanding that the proposal would come through the city.



Matanuska-Susitna Borough

BOX B, PALMER, ALASKA 99645 • PHONE 745-4801

DEPARTMENT OF ADMINISTRATION

March 10, 1983

David Soulak, City Manager
City of Palmer
P. O. Box 1368
Palmer, Alaska 99645

Dear Dave:

Re: Senior Citizen Housing in Palmer, Alaska

In late January, 1983, the Assembly, acting upon a request of the Borough Senior Citizens Advisory Board, endorsed congregate senior housing for the Palmer area near the Pioneer Home. I know that the City of Palmer has taken an interest in senior citizen housing also.

Even though the State of Alaska Senior Citizen Housing Program has limited monies for senior housing for the FY 82-83 fiscal year, we might better our chances of getting funding for congregate senior housing within the City of Palmer if we went ahead and filed a formal application using the State forms. I have reviewed the forms and I believe that they would be fairly easy to fill out.

In the past we have talked primarily about site acquisition and planning for senior congregate housing in Palmer.

I believe that the process can be substantially accelerated, if we are able to arrange for a trade of the parcel on Chugach Street between the Pioneers Home and University of Alaska grounds immediately south of the Palmer Senior Citizens Center.

This 4.8 acre parcel is owned by the University of Alaska and portions of it have been devoted to the raising of perennial trees and shrubs for experimentation purposes. East Fern Avenue and East Geranium Avenue, although they are platted streets, have never been built and the land area within those two streets could presumably be added on to the 4.8 acres.

I think that it is probable that the University of Alaska would be interested in a trade for a portion or all of the 4.8 acres, if the Borough could find land of equal value to them for plant experimentation purposes or other University purposes. It might be possible to acquire rights to just the westerly half of the property for a stage one effort on senior citizen housing with an option to acquire the eastern half at some later date for

senior citizen housing. There are a number of perennials along Chugach Street and it should be possible to save many of the trees and shrubs along the street.

I have a strong impression that an exchange of Borough land for University land at this location would not materially affect the University's mission with respect to plant experimentation and that, if the University could acquire greater acreage for the same purpose at another location, their mission would be furthered.

Accordingly, I would propose that the City of Palmer and the Matanuska-Susitna Borough approach the University of Alaska with respect to this acreage and, if it appears that it is available, that we proceed with the filing of an application for senior citizen housing monies to the State of Alaska Department of Community and Regional Affairs for a congregate senior citizen housing project on this acreage. Any effort of this kind would, of course, require review and approval by the Assembly of the Matanuska-Susitna Borough and the City Council of the City of Palmer.

We have discussed site criteria for senior citizen housing in the Palmer area before. The Borough Senior Citizen Advisory Board has also discussed site criteria. In my opinion, the 4.8 acres described above would probably come closest to meeting agreed upon site criteria than any other parcel. There may be other publically and privately owned lands close to the Pioneers Home that would also be suitable for senior citizen housing, but regardless of whether there is such acreage or not, a siting of senior citizen housing on the 4.8 acres should meet all site criteria for at least a stage one effort for senior citizen housing.

I would like to list some probable features of senior citizen housing at this location and site criteria as follows:

1. Number of units. At 14 units per acre, there would be room for about 70 units on the five acre parcel. U. S. Housing and Urban Affairs Department minimum property standards would suggest that density be limited to about 14 units to an acre. If each unit physically occupies five hundred square feet, this would mean that about one-sixth of the area would be in housing, with about five-sixths being left for side yards, patios, setbacks, separation between buildings, clearances and parking. The development would probably consist of various groups of one story townhouses. There should be some open space saved where existing perennials could be retained.

If the project were staged into two halves, then the first half could include as many as 35 units upon 2½ acres with stage two being accomplished at some later date if the need justified additional units. I believe that for planning purposes it is possible to make some gross estimates as to number of units

per acre it being understood that the actual density and siting of buildings would await schematics prepared by an architect.

2. Type of housing. The housing would be single story housing all on one grade to avoid any problems of foot access or access by handicapped persons. The size of the units would probably be somewhat smaller than the units in Wasilla, because the amount of housekeeping activities occurring within the unit would be less. The units would be designed for independent living, but they would also be designed for greater access to other senior citizen facilities than is the case with Wasilla senior housing. Congregate housing, which would be built at this location, provides more ready physical access to an area where meals can be taken and where adult day care and medical services can be readily obtained.

This particular location is about as close to the Pioneers Home as you can get. It is only three blocks away from the Valley Hospital. This site would rank very high within the City of Palmer, within the Matanuska-Susitna Borough and in the State at-large, with respect to closeness of facilities needed for congregate housing.

Among other things, the site provides closeness to:

- a. Pioneers Home with its clustering of facilities, including facilities for social events.
- b. Palmer senior citizen facility which serves lunches, is a center for social activities and is also an origination point for transportation.
- c. Closeness to Valley Hospital and medical care.
- d. A location two blocks from stores, restaurants and shops, all of which are within easy walking distance of the site.
- e. A site that is one and one-half blocks from a museum, ballfields, proposed Palmer Library and landscaped areas.
- f. A site that is close to the regular meeting places of The Pioneers of Alaska, the Grange, Lions, Kiwanis, Historic Preservation Committees etc.
- g. A site on a paved street without excessive traffic, with sewer, water and electricity.
- h. An especially friendly environment to older persons whether they use the automobile or depend on walking.
- i. A handsome setting.

j. Good climate.

We should be able to work from information previously compiled for the Wasilla senior citizen housing. Our Planning Department can immediately undertake a needs assessment. There is a 90 person waiting list for the Pioneers Home, which is some indication of the need for congregate housing in the Palmer area.

As I understand it, the State of Alaska Department of Community and Regional Affairs makes its decision to allocate senior citizen housing according to objective criteria such as demand for units, convenience of units with respect to facilities that senior citizens desire or need, level of community support etc.

I would think that if there is competition for a limited amount of senior citizen housing, the City of Palmer, working with the Matanuska-Susitna Borough, could present a case to the Department of Community and Regional Affairs that would result in a very high priority being assigned to additional senior citizen housing units in this part of Alaska.

Sincerely,



Gary Thurlow
Borough Manager

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Matanuska-Susitna Borough

assembly memorandum

no. AM 83-27

from: Gary Thurlow, Borough Manager

date: 1/25/83

subject: SENIOR HOUSING IN THE MATANUSKA-SUSITNA BOROUGH

The Borough Senior Citizens Advisory Board has studied proposals now under consideration by the State Office of Management and Budget that 1.8 million dollars additional money be allocated to senior citizen housing in Wasilla and Palmer.

The Matanuska-Susitna Borough Senior Citizens Advisory Board thought that good planning would call for constructing fourteen additional units in Wasilla at this time for a total of 32 units--18 units already funded plus 14 additional units from the 1.8 million and that the balance of approximately \$400,000 ought to be allocated for planning and site acquisition for congregate housing in Palmer.

The board considers that the status of planning for the Wasilla project is such that the new units could be constructed and occupied at an early date and that planning for the Palmer area has not yet reached a point where early construction could be anticipated.

In planning for senior housing in the Matanuska-Susitna Borough, the board concluded that there is a need for a balance of two different types of senior housing:

Clustered independent housing of the type already planned for Wasilla.

Congregate housing, which is primarily independent housing, but which provides more ready physical access to an area where meals can be taken and where adult day care and medical services can be readily obtained. Palmer is the best location for this type of housing because the Pioneer Home and the Valley Hospital are located there.

In the judgment of the advisory board, recent needs assessment information shows that there is a sufficient demand for the additional housing in Wasilla. Although the board believes that there is sufficient demand for congregate housing in Palmer, there being a 90 person waiting list for the Pioneer Home, a full needs assessment has not been carried out for congregate housing. Additional time for senior housing in Palmer

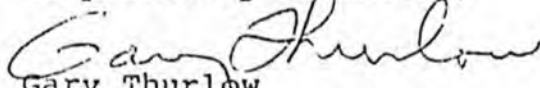
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would make it possible to compile more reliable assessment needs information for congregate housing in Palmer.

Congregate housing should be located so that there would be ready access to certain facilities in the Pioneers Home, which means that closeness to the Pioneers Home would be an important site selection criterion. Among other things the Pioneer Home is the origination point for transportation and is the location of many social functions.

It is the opinion of the advisory board that the overall and long-term housing needs of senior citizens in the Valley could be best met if available state senior housing resources were used in this way. The above approach has been thoroughly reviewed with both the Wasilla and Palmer Senior Citizen organizations and they are agreed that this is the best way to pursue an adequate program of senior housing in the Borough.

If the Assembly agrees with this analysis, a copy of this memorandum will be sent to the Office of Management and Budget within the Office of the Governor, to the State Department of Community and Regional Affairs, to our legislative delegation, to the House and Senate Committees on Health and Social Services, to John Wolfe, Executive Director, Older Alaskans Commission, Pouch C, Juneau, Alaska (9811 and to Louis Odsather, Chairman, Pioneer Homes Advisory Board, P. O. Box 178, Wasilla, Alaska 99687.

Respectfully submitted,

Gary Thurlow
Borough Manager

er

January 24, 1982

Mrs. Rose Palmquist
325 Dawson Street
Leslie Building
Anchorage, Alaska 99503

Dear Rose,


You may recall I informed you last year in August, 1982, that I had applied for an apartment in the Chugach View Senior Apartments, Anchorage. At the time I applied, I was number 90 on the waiting list. Now, five months later, I am number 78 on the list, which, according to Chugach View management indicates a two-year wait for an apartment.

I have been ill and ^{thus} far unable to work even part time. The rent for my small, one-bedroom apartment with no storage, has gone up four times since 1981, for a total of 78%. Now management has notified us that they are going to remodel all of the apartments because the new owner (someone Outside) may want to sell in two or three years and won't be able to make a profit unless there's some improvements made to the apartments. The building is 20 years old, as is the carpeting and other items in the apartments. The remodeling will increase the price of the apartment by \$200, for a total of \$600 for this small, one-bed-room apartment.

This new rent outlay will not leave much from a small fixed income, grateful as I am for it.

I am writing to inquire if you see any indication that our legislators will provide the necessary funds for the much talked about 120 additional units at Chugach View, so badly needed.

Sincerely,



Bess Ferrara

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

HOUSING NEEDS OF THE ELDERLY IN THE MATANUSKA-SUSITNA BOROUGH

Prepared by
POLICY ANALYSTS, LIMITED

DR. RICHARD L. ENDER

Prepared for
ALASKA DEPARTMENT OF COMMUNITY AND REGIONAL AFFAIRS
WITH
MATANUSKA-SUSITNA BOROUGH
COOK INLET NATIVE ASSOCIATION
MAT-SU OEDP. INC.

June, 1980

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HOUSING NEEDS OF THE ELDERLY IN THE MATANUSKA-SUSITNA BOROUGH

Introduction

The purpose of this study is to provide an assessment of the present housing condition and the housing needs of the elderly residing in the Mat-Su Borough. This requires a description of the demography of the elderly and their housing situation as to type, payment, quality and general condition. This information base provides the possibility of producing quantitative indicators of need. Measures include financial needs (costs exceeding the capacity to pay), structural needs (relating to serious structural defects in their housing), energy needs (the lack of energy efficient systems), and utility needs (inadequacy in water, sewer, heat, etc.). The discussion will conclude with the perceived desirability of future housing alternatives.

Methodology

The analysis is based on a survey of 679 randomly sampled households in the Mat-Su Borough. Areas not connected by road or sufficiently sparse in estimated population were excluded. The remaining available for sampling was estimated to be 85 to 87 percent of the Borough population. Therefore, approximately 13 to 15 percent of the more rural population was excluded from the sampling process. This could effect the accuracy of estimation of a number of population characteristics, particularly in the area of housing. Thus, the reader is cautioned as to the limitations of the sample. (See appendix for methodology)

The population estimate of the Matanuska-Susitna Borough for December 1979 is 18,536. This is 4,651 people below the official 1979 Borough estimate accepted

by the Department of Community and Regional Affairs (23,177), but is higher than 1978 estimates made by the Department of Labor (15,400) and Bureau of the Census (16,100).

Demographic Characteristics of the Elderly Residing in Mat-Su Borough

Defining the number of elderly in the Borough is generally done by estimating the number of people above a specified age. About 5.6 percent of the Borough is 60 years of age or more, which is 1,040 individuals. An additional 7.8 percent of the population is 50 through 59 years of age (1,442). Table 1 estimates each of the age categories and the proportion falling in each, while figure 1 attempts to display the age distribution of the over 50 population.

TABLE 1: ESTIMATED ELDERLY MAT-SU POPULATION BY AGE CATEGORY

<u>Age</u>	<u>% of Population</u>	<u>Population Estimate</u>
50-54	4.6	845
55-59	3.2	597
60-61	1.0	179
62 and over	4.6	861

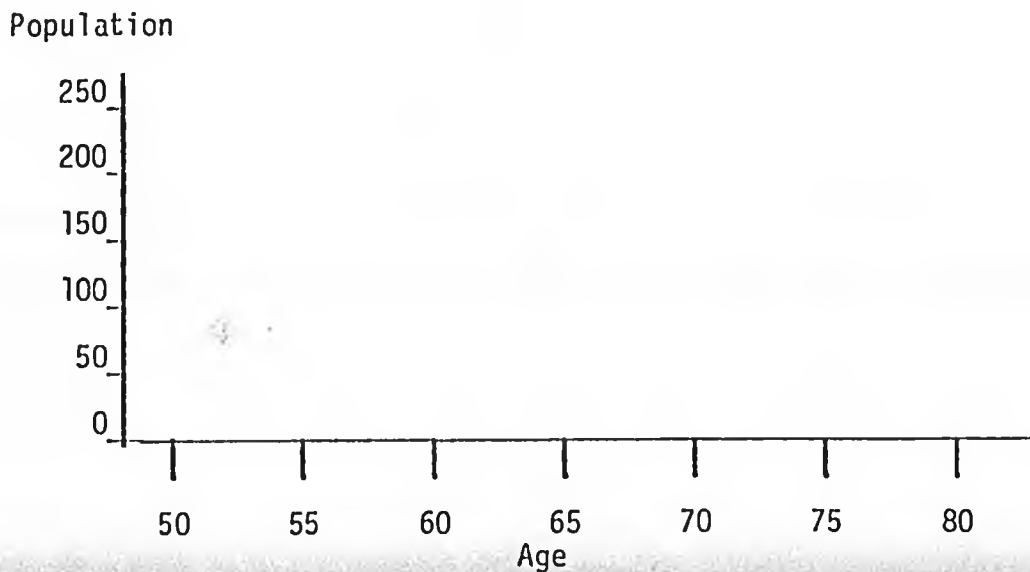


FIGURE 1: FORECASTED AGE CURVE OF MAT-SU ELDERLY
(Actual curve would not be expected to be perfectly smooth)

Though the 60 years and over elderly population is only 5.6 percent of the population, they are spread throughout 11.6 percent of the households. Thus, of the estimated 5,546 occupied households in the Mat-Su, 645 have one or more persons 60 years of age or more, or 1.6 elderly persons per elderly household.

Table 2 highlights the distribution of six measures by four age categories. The key observation is the marked difference between those 50 to 59 years and those 60 years and over. The incidence of widowed status rises measurably after 60 as does retired employment status. Educational attainment also falls as age increases. Race remains fairly constant though the proportion of non-whites increases slightly above 62 years of age. A constant 55 percent male, 45 percent female distribution is reversed for the 60-61 year group. It is difficult to tell if this is due to actual differences occurring or the small size of the 60-61 subgroup.

Another question focuses on where elderly households are located. Generally, senior citizen households are distributed fairly evenly in proportion to the total population. For example, 10.1 percent of the elderly households sampled were in the Butte area while 9.4 percent of all households were located in Butte. There are two important exceptions to this that involve the two most heavily populated areas of the Mat-Su. While 39.6 percent of the sample came out of the Wasilla area, only 25.3 percent of the senior households were from Wasilla. The reverse was true for the Palmer area with 26.2 percent of the total sample and 40.5 percent of the elderly households responding.

TABLE 2: PERCENTAGE DISTRIBUTION OF SELECTED DEMOGRAPHIC INDICATORS BY AGE CATEGORIES

<u>Sex</u>	<u>50-54</u>	<u>55-59</u>	<u>60-61</u>	<u>62+</u>
Male	57.6	54.3	42.9	55.4
Female	42.4	45.7	57.1	44.6
 <u>Marital Status</u>				
Married	90.8	94.3	85.7	76.2
Single	5.1	1.4	----	1.0
Divorced	3.1	4.3	4.8	6.9
Widowed	1.0	----	9.5	15.8
 <u>Weeks Employed in Past Year</u>				
None	35.1	32.9	55.0	78.2
1-49	19.5	25.7	15.0	7.9
50-52	45.4	41.4	30.0	13.9
\bar{X}	27.2	27.4	19.5	9.2
 <u>Present Employment Status</u>				
Employed	51.0	55.7	33.0	18.8
Unemployed	16.3	10.0	14.3	1.0
Retired	12.2	18.6	23.8	70.3
Homemaker	20.4	15.7	28.6	9.9
 <u>Education</u>				
0-11 years	29.6	21.7	20.0	43.2
12	29.6	37.7	55.0	17.9
13-15	22.4	20.3	15.0	16.8
16+	18.4	20.3	10.0	22.1
\bar{X}	12.3	12.8	12.2	11.8
 <u>Race</u>				
White	97.0	98.6	100.0	95.0
Native	3.0	----	----	3.0
Other	----	1.4	----	2.0
 (n)	 (99)	 (70)	 (21)	 (101)

Characteristics of Households With an Elderly Member

In addition to discussing the characteristics of individual senior citizens, it is necessary to assess households in which elderly reside. For example, the question of relative deprivation is an important one. This includes housing and economic status comparisons to the general population. Table 3 compares senior and total households on ten selective measures. A senior citizen household is defined as any unit with at least one individual who is 60 years of age or more.

Senior households are smaller (an average of 2.5 persons per household versus 3.3) compared to the general populations. This is largely due to the absence of children in the household. Adults per household are essentially the same comparing senior and general households. Senior households have an average residence in the Mat-Su more than twice that of the total population. They also have lived in their present residence seven years more than all households.

Looking at housing characteristics, senior citizen households are somewhat more likely to be single family structures (though most housing in the Borough is single family). Also senior households are almost two times more likely to own their home outright which results in average housing payments less than one-half the total population. Lower payments are also due to the fact that 50 percent of the senior households have resided in their home prior to 1973 suggesting lower interest rates for those buying their home. Senior housing is logically older reflecting the longer time in residence. Though there is a greater incidence of single family residence, the older housing produces slightly smaller homes for seniors. Their homes average 5.0 census rooms, 2.4 bedrooms and 1.4 bathrooms compared to 5.3 census rooms, 2.6 bedrooms and 1.4 bathrooms for the general population. Considering the lower average household size of seniors it is unlikely that the problem of crowding occurs with any frequency.

TABLE 3: COMPARISON OF SENIOR CITIZEN AND TOTAL SAMPLE HOUSEHOLD ON
SELECTED HOUSING AND SOCIO-ECONOMIC CHARACTERISTICS

<u>Current Housing</u>	<u>Senior Households</u>	<u>Total Households</u>	<u>Size of Household</u>	<u>Senior Households</u>	<u>Total Households</u>
Single Family	88.6	81.6	1	19.0	9.4
Multi-family	2.5	5.6	2	55.7	26.8
Mobile Home	7.6	12.4	3	12.7	20.2
Other	1.3	0.4	4+	12.7	43.6
			\bar{X}	2.5 persons	3.3
<u>Ownership Status</u>			Median	2.1 persons	3.2
Own	64.1	33.9	<u>Presence of Children</u>		
Buying	28.2	49.5	0	83.5	40.5
Rent	6.4	13.6	1+	16.5	59.5
Other	1.3	2.9			
<u>Housing Payment</u>			<u>Household Members With a Mental or Physical Handicap</u>		
None	69.3	36.8	Yes	6.9	5.2
\$20 - \$1,262	30.7	63.2	No	93.1	94.8
\bar{X}	\$113	\$253			
Median	\$ 89	\$200			
<u>Structure Built</u>			<u>Household Income</u>		
Up to 1955	25.6	10.6	\$0 - \$12,499	24.6	17.7
1956 - 1970	29.5	21.3	12,500 - 19,999	28.0	14.6
1971 - 1975	19.3	20.8	20,000 - 29,999	17.6	19.0
1976 - 1979	25.6	47.3	30,000 - 39,999	19.3	22.6
\bar{X}	1964	1970	40,000+	10.5	26.1
Median	1969	1975	\bar{X}		
			Median	\$19,375	\$29,047
<u>Length of Residence in Present Structure</u>			<u>Residence in Mat-Su Borough</u>		
1978 - 1980	19.0	43.2	Up to 2 years	7.6	18.6
1974 - 1977	27.9	36.8	2 to 5	21.5	37.7
1969 - 1973	12.7	8.8	5.1 to 10	8.9	16.5
1964 - 1968	15.2	4.9	10.1 to 15	7.6	7.1
1959 - 1963	10.1	2.0	15.1 to 20	8.8	4.9
Before 1959	15.2	4.3	20.1+	45.6	15.2
\bar{X}	1968	1975	\bar{X}	19.9 yrs.	9.3 yrs.
Median	1973	1977	Median	19.9 yrs.	5.0 yrs.
(n)	79	679			

A key characteristic in any analysis of housing need is income as a measure of financial capacity. Total income of senior citizen households is significantly lower than the population. The median income of seniors is almost \$10,000 below all households suggesting a markedly reduced capacity in affording housing options. Almost one-quarter of senior households earned less than \$12,500 in 1979. In addition to employment income, 40.3 percent of the elderly households receive the Alaska Longevity Bonus. Private pension income goes to 35.5 percent of senior households; 72.7 percent receive social security; and only 1.3 percent receive old age assistance. The incidence of these income sources increases significantly as age increases.

Income ceilings developed by the Department of Housing and Urban Development provide a method to measure financial need. The approach uses the total income of the household and relates this to the number of people residing in the home. Table 4 shows the 1979 HUD income ceilings for Anchorage which would be generally applicable to the Mat-Su.

Using these guidelines, 40.7 percent of the Mat-Su senior citizen households qualify for HUD assistance. This is substantially above the proportion eligible within the general Mat-Su population (27.5 percent) or those eligible in Anchorage (25.5 percent).

TABLE 4: HUD INCOME ELIGIBILITY GUIDELINES

<u>Size of Family</u>	<u>Income Ceiling</u>
1	\$14,000
2	16,000
3	18,000
4	20,000
5	21,250
6	22,500
7	23,750
8+	25,000

The Quality of Present Housing

Present housing quality is an important measure of housing needs. Those living in housing which is unsatisfactory in terms of structural deficiencies, absence of standard utilities or equipment, or the lack of other necessary characteristics produce a greater need for programmatic action. Tables 5 and 6 provide a number of housing condition measures both from the viewpoint of the respondent as well as objective indicators.

The data presented generally support the conclusion that there is a small group of senior citizen households (about 2.5 to 3.0 percent) whose housing is seriously deficient and is measured that way both objectively and subjectively. The result was that 2.6 percent of the elderly households rated their present housing as poor, though a general assessment by field interviewers found no senior housing so poor that it was structurally not worth repairing and could be expected to leave the market.

Added to those elderly living in poor conditions, another eight to ten percent reside in fair housing. This could be defined as housing which had defects which are important but either not serious or correctable by making reasonable (in terms of cost) repairs. Generally, the quality of senior housing is somewhat better in terms of quality compared to the total stock. This does not overshadow the fact that a small number of elderly are found with heating, water, facility, a structural inadequacies. This means 20 to 80 households affected by deficiencies depending on the exact measure.

One interesting crosscheck of data involves comparing perceived crowding by respondents and an objective measure of crowding. Crowding is defined as more than 1.01 persons per census room. While 6.4 percent of the senior households

perceived overcrowded conditions, only 3.8 percent could be objectively measured as crowded. This compares to 14.7 percent of all households who perceived themselves as crowded while 9.6 percent were measured as crowded.

TABLE 5: COMPARISON OF SENIOR CITIZEN AND TOTAL SAMPLE HOUSEHOLDS ON PERCEIVED QUALITY OF HOUSING

<u>Perceived Housing Condition</u>	<u>% Senior Households</u>	<u>% Total Households</u>
Heating System Does Not Keep Home		
Warm in the Winter	3.8	6.9
Overcrowded Housing	6.4	14.7
Housing too Expensive	5.1	16.8
Poor Insulation	13.0	18.9
Rundown Condition	3.9	6.8
Lack of Storm Windows	23.7	22.7
Housing too Far From Job, Shopping and Friends	9.1	17.9
Rate Present Housing as a Place to Live		
Excellent	47.4	42.4
Good	42.1	42.8
Fair	7.9	13.2
Poor	2.6	1.6

TABLE 6: COMPARISON OF SENIOR CITIZEN AND TOTAL SAMPLE HOUSEHOLDS ON OBJECTIVE MEASURES OF HOUSING QUALITY.

<u>Assessment of Structure</u>	<u>% Senior Households</u>		<u>% Total Households</u>	
	<u>Fair</u>	<u>Poor</u>	<u>Fair</u>	<u>Poor</u>
Roof	9.2	--	12.0	1.1
Outside Walls	9.2	2.6	13.5	1.5
Foundation	11.8	2.6	12.4	1.7
Door and Windows	11.8	--	14.7	1.5
Chimneys	8.0	--	11.6	1.1
Steps	12.0	1.3	13.5	2.0
General Condition	11.8	--	13.2	0.6
<u>Lack of Facilities</u>	<u>% Senior Households</u>		<u>% Total Households</u>	
Kitchen Sink with Piped Water	6.3		8.0	
Range or Cookstove	2.5		1.6	
Refrigerator	3.8		4.0	
Hot and Cold Running Water	2.6		9.3	
Flush Toilet	2.6		9.6	
Tub or Shower	2.6		9.6	

Preference for Future Housing

In general terms, senior households want much the same in housing as everyone else residing in the Borough (see table 7). Only 5.1 percent of elderly households sought to relocate their housing during the previous six months. This included one elderly respondent who was looking to relocate to retirement housing. Most (92.4 percent) prefer the single family unit as a desirable housing style though their bedroom needs (2.16) are less than the general households (2.74) reflecting their smaller size. Ownership of housing is almost a universal desire with only 6.6 percent preferring a rental situation. However, the perceived maximum housing payment that a senior citizen household could make each month is considerably below that of all units (averaging \$331 versus \$419). This difference is reasonable considering the lower median incomes of elderly households.

On the subject of alternative housing styles, the elderly are not much different from the general population. Only 12.7 percent responded in any positive way to a condominium arrangement, and 7.6 percent were positive toward a mobile home park option. Four elderly respondents noted that condominiums would be a good option for retirement housing (5.1 percent), and another 19 respondent households with no senior member expressed the same opinion.

For those households with a senior citizen present, three questions were asked relating to retirement housing (see table 8). The first measured interest in moving to senior citizen housing in the Borough. A projected 114 elderly households in the Mat-Su would consider this housing option, if available, but 522 would not. To measure a greater level of commitment, only 7.7 percent of senior households (a projected 50) responded with a willingness to move into senior housing within the next year. An estimated 595 households would not be interested.

TABLE 7: COMPARISON OF SENIOR CITIZEN AND TOTAL SAMPLE HOUSEHOLDS ON HOUSING PREFERENCES

	<u>Senior Households</u>	<u>Total Households</u>
Looked for Other Housing in Past Six Months	5.1%	12.1%
Housing Preference		
Single Family	92.4%	94.8%
Duplex	2.5%	1.3%
Apartment	.0%	0.4%
Townhouse-Condo	2.5%	0.6%
Mobile Home	1.3%	1.0%
Other	.0%	1.6%
Undecided	1.3%	0.1%
Average number of Bedrooms Needed	2.16	2.74
Prefer to Buy Housing Rather than Rent	93.4%	95.8%
Maximum Amount Could Pay		
\bar{X}	\$331	\$419
Median	\$299	\$400
Would Consider Condominiums	12.7%	11.7%
Would Consider Mobile Home Park	7.6%	9.3%

The final question dealt with the location of future senior citizen housing. Thirty percent of the elderly were unwilling to give a location because they saw no needs. For those with an opinion, the Wasilla area had the most support with 31.6 percent, with Palmer the second preference (20.3 percent). Locations west of Wasilla was preferred by 8.9 percent and Chugiak was mentioned by 2.5 percent. Generally, residents selected locations near their present home. Wasilla received support because it was the primary choice (when one was made) of living in Wasilla, and areas to the west such as Houston, and Willow; and was also selected by 26 percent of the Palmer and, 28.6 percent Butte residents who gave a site choice.

TABLE 8: PREFERENCES FOR SENIOR CITIZEN HOUSING

	<u>YES</u>	<u>NO</u>	<u>DON'T KNOW</u>
Would Consider Moving to Senior Citizen Housing in Borough			
%	17.7	81.0	1.3
Projected Households	114	522	9
If Built Would Move into Senior Citizen Housing Within the Next Twelve Months			
%	7.7	92.3	.0
Projected Households	50	595	0

Town Preferred for Location of Senior Citizen Housing^a

	<u>Percent</u>	<u>Projected Households</u>
Anywhere in the Borough	5.1	33
Palmer	20.3	131
Wasilla	31.6	204
Talkeetna; Big Lake, Knik, Willow	8.9	57
Chugiak	2.5	16
Not in Town	1.3	8
Don't Need it; Rehabilitate What We Have	3.8	25
Refused; Because Not Interested	17.7	114
Don't Know; Don't Care	8.9	57

^aTowns not mentioned (such as Houston) are due to the use of an open-ended question and no one in the sample referred to those particular communities.

Housing Scenario Based on Elderly Needs

Based on the data available the following scenario was developed to meet the housing needs of the elderly in the Mat-Su Borough. See Table 9 for a breakdown of demand.

- Locate 20 units in the Wasilla area in relative proximity to basic services, possibly keeping in mind the location of the proposed senior citizen's center.
- These units should be clustered, but constructed to provide a sense of space reflected in the dominant lifestyle of Mat-Su area. This might mean clustered fourplexes constructed in a row style to give all occupants individual access to their units and a small semi-private garden area. Structures larger than a fourplex or of an traditional apartment style construction would reduce their attractiveness to potential clients.
- Based on the desires of those interested in senior citizen housing, ten of the units should be constructed as one bedroom and ten units as two bedroom. If this were not done, there is no way to predict if demand would be reduced below the level predicted.

This scenario is based on the following points:

- The demand of the entire Borough for subsidized elderly housing is only about 50 units. Of that, it is estimated that up to 28 units of the demand would prefer Wasilla. One additional reason a population center was chosen rather than any point along the Parks Highway was the point

that seniors interested in this type of housing were dissatisfied with their present housing due to its remoteness from services and social interactions.

- Even though the optimal demand is 28 units, the number of refinements cuts this number to 20. Only one-fifth prefer structural configurations other than the single family house, and only 21 percent would prefer renting. An addition, 60 percent of the potential clients own their homes outright which reduces the economic impetus to relocate.
- Elements which reinforce demand is that those interested in relocating to senior citizen housing are twice as likely to have inadequate heating systems, perceive their present housing as too expensive and four times as likely to have insufficient hot water and presently have fair to poor housing compared to other seniors.
- Economic status also plays an important role in leading to demand for senior citizen housing. The perceived housing payment affordable to those interested in senior housing is lower than other elderly. Sixty-four percent of those interested stated they could only pay \$200 or less a month, while 63 percent of other seniors could afford to pay over \$200 a month for their housing.

TABLE 9: PROJECTION OF SENIOR CITIZEN HOUSING DEMAND

Total number of elderly households in the Mat-Su Borough.	N 645
Interested in senior citizen housing.	114
Would most likely move in	50
Would move in if located in Wasilla	28
Would move in, if located in Wasilla, in a low density rental configuration	20

APPENDIX

METHODOLOGY OF THE MAT-SU HOUSING AND ECONOMIC DEVELOPMENT STUDY

INTRODUCTION

The general goals of this study were to document the attitudes, behavior and characteristics of a sample of the Matanuska-Susitan Borough's population related to housing needs and issues of economic development. The success of the study depended on the close cooperation of a number of agencies and organizations. The base funding for the study came from a grant made by the Department of Community and Regional Affairs to the Cook Inlet Native Association (CINA). While the grant was the key, it was not sufficient to cover the cost of the entire effort. CINA contracted with the Mat-Su Borough to act as the prime sponsor of the study. The Mat-Su Overall Economics Development Plan, Inc. (OEDP) joined the project by providing the field work management at no cost. The Borough contributed substantial CETA funds and other indirect monies to underwrite a portion of the field work, a field work supervisor, printing of the questionnaire, and other costs. Policy Analysts, Limited provided the technical expertise in questionnaire design, sampling, data processing, and analysis. While it is difficult to assess the total cost of the project, it easily exceeded \$20,000.

The Questionnaire

The survey instrument was 18 pages in length and was designed by Policy Analysts, Limited. This included 13 pages in the main body of the

questionnaire plus five handout sheets to be filled in or to understand particular questions. The interview varied among respondents but averaged about 30 minutes. There were 85 questions or question groups asked which resulted in 185 discrete pieces of datum coded from each interview.

The field work was conducted during the months of November 1979 to January 1980. Twelve interviewers were employed to complete the 679 total surveys. All the staff went through one training session to familiarize each interviewer with the particular aspects of this schedule and review basic interviewing techniques. In addition, completed material was reviewed to detect initial field problems. In order to monitor progress, interviewers had to maintain daily contact with the field work supervisor.

A copy of the complete questionnaire is presented in the back of this publication.

Sample Design

A skip interval areal probability cluster housing technique forms the basis for this sample survey. A complete list of the distribution and location of housing in the Mat-Su Borough does not exist in one place.

A planned complete housing count was abandoned for lack of funds. The following process was utilized to produce the most complete housing

count by location.

- Step 1

Data from Mat-Su Borough computer listing of plot ownership were compiled to check for assessed building evaluation.

Residential units were identified on the basis of assessed building evaluation using a base of \$4,000 building evaluation on taxable land pieces for a residential status in the Palmer, Wasilla and Big Lake areas unless contrary information was available. The \$4,000 cut off assessment evaluation reflects \$2,500 for a well and \$1,000 for a septic structure, which is consistent with Borough assessor evaluations.

The base evaluation rate used for outlying areas; such as Eureka, Chickaloon, Sutton, Houston, Willow, Talkeetna, Skwentna, and other outlying areas was \$2,000 (unless otherwise discernible) for building improvement assessments to determine residential status. The \$2,000 minimum level for the more rural areas reflects possible very low cost structures, such as cabins. Anything with an assessed value above \$180,000 was considered commercial unless otherwise verified by the research group.

Data were transferred from computer listings onto the Mat-Su Road System Map to identify specific locations. In the case

of subdivisions, information was cross-referenced with the Tax Assessment Map to find exact ownership location.

In the first step, no attempt was made to differentiate between multi-family, single family, recreational; trailer or commercial dwellings, unless the specific location was discernible; except for assessed evaluations in excess of \$180,000, which are considered non-residential.

The first step mapping code system for dwelling was "0". Eventually this evolved to a more complex system as follows:

Single family Dwelling	0
Multi-family Dwelling	Ø
Trailer	T
Recreational	R
Commercial	C

• Step 2

The mapped information from Step 1 was compared with the 1976 Land Use Survey map to check residential status and add discernible specific data (such as trailers, single or multi-family dwelling, and commercial buildings.

Maps were also cross checked for dwellings that were arbitrarily left out under the \$4,000 building evaluation in Palmer and Wasilla areas and under the \$2,000 building evaluation in outlying areas.

- Step 3

The data base from Step 2 was reviewed with the Borough assessors to determine:

- 1) Correctness of 1978 compiled data
- 2) New additions since 1978
- 3) Specific types of dwellings (commercial, single or multi-family, trailer, and recreational)

- Step 4

Any areas in question were surveyed visually by driving to areas and confirming the type of dwelling.

The above process produced a structure count of 6,075. This included 147 commercial buildings, and 1,141 recreational structures, leaving 4,787 residential dwellings. This number was adjusted by 250 because an assessor's analysis suggested the 60 multi-family structures produced about 310 multi-family separate units. This produces 5,037 identified units. A breakdown of the units by area is noted in table 10. The boundaries of the areas is given in figure 2. A discussion of these counts with actual estimates is noted in the following section.

TABLE 10: HOUSING COUNTS BY AREAS OF THE BOROUGH

Area	Total Residential	Single Family	Multi-Family	Mobile Homes	Recreational	Commercial
Talkeetna	94	92	—	2	22	4
Montana	70	69	—	1	44	3
Caswell	39	39	—	—	31	1
Willow	164	162	—	2	274	4
Houston	214	205	—	9	92	6
Big Lake	392	371	3	18	530	8
Goose Bay - Knik	62	62	—	—	13	—
Point MacKenzie	17	17	—	—	—	—
Wasilla	1,826	1,761	22	43	133	85
Palmer	1,297	1,207	31	59	2	24
Butte	476	440	4	32	—	11
Sutton - Chickaloon - Independence Mine	136	136	—	—	—	1
Adjustment	250	—	250	—	—	—
Total	5,037	4,561	310	166	1,141	147

Based on the final counts, 150 clusters of six designated units were apportioned to the base maps by the percent of units each map had. Base maps without road access or in which the number of units fell below 20. In all, 64 maps were discarded, of which 16 had no residential units, and six had only one unit. Non-road areas outside the mapped locations were also excluded. The sample thus was a random distribution of the road areas of the Borough with at least a minimum population. This constitutes about 85 percent of the population. The clusters allocated to each map were then apportioned to one of nine sections on the map based on the unit distribution. Start points for each cluster within a cluster was selected by a random number generator from a set of random start points. Once a start point was fixed, every third unit was sampled for a total of six units.

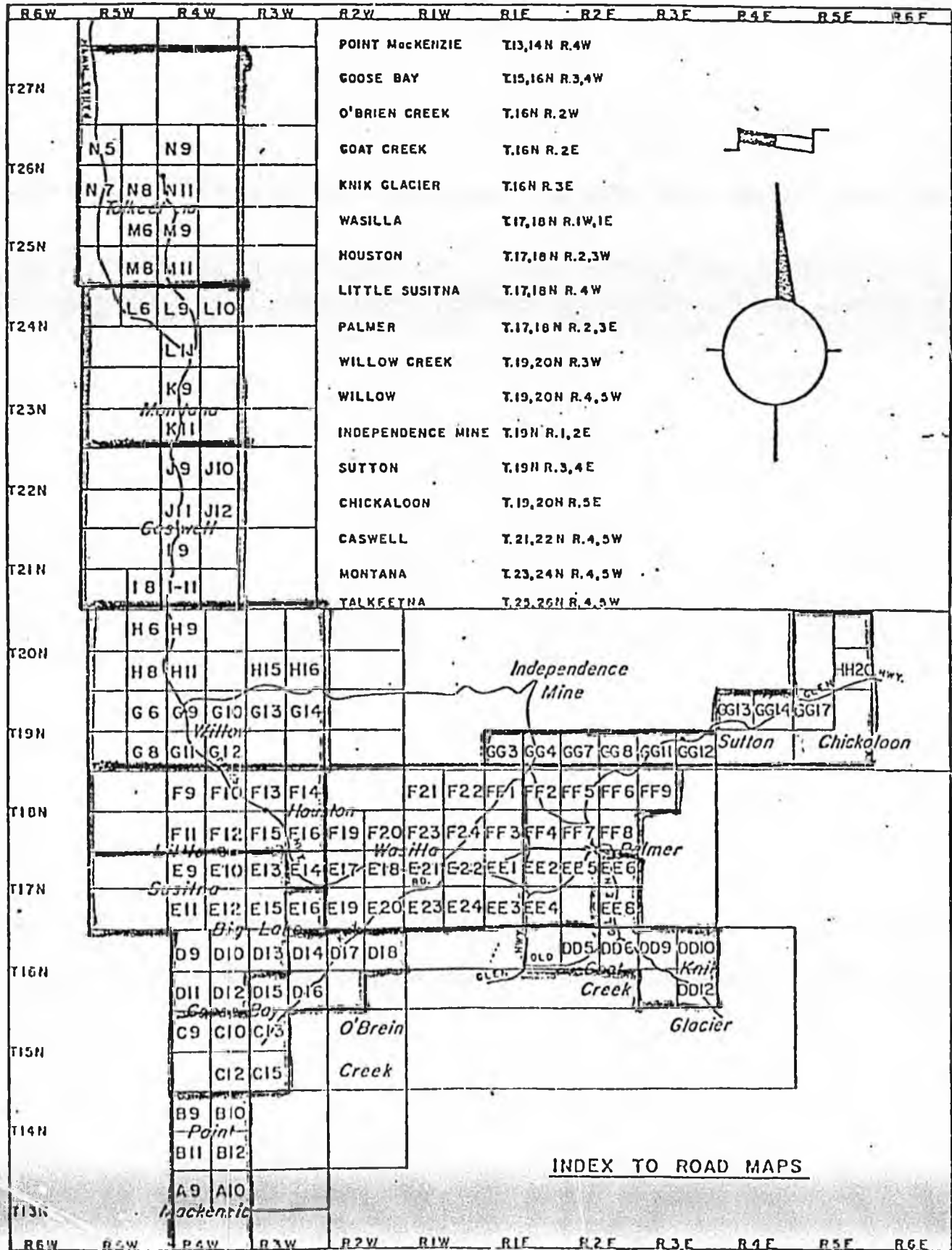


FIGURE 2: Road Connected Areas of Mat-Su Borough Showing Subarea Demarcations

This information was transferred to a special field map showing the location of the clustered units (one field map per cluster was prepared). Of the 900 units sampled, 679 interviews were completed. Most sample points had four to five interviews completed. An analysis of completed interviews suggested that it was a randomly distributed sample of the road connected areas of the Borough, and constituted about 12.2 percent of the total occupied housing stock in the Borough

Projection of Housing and Population

While 5,037 units were identified in the sampling process, it is estimated that there are 5,844 dwelling units in the Borough. The difference is due to two things: roadless areas were not counted, and the approach used produces an undercount in the road connected areas. It is estimated that 8.5 percent of total stock lie in the roadless areas. In addition, the methodology used could not be completely precise. Units misidentified as recreational, below assessment limits, not showing up in records, built too recently to be included, and generally poor records make accuracy a problem. This produced about a 5.3 percent undercount.

Of the 5,844 units estimated to exist, 5,546 are occupied. This produces a 5.1 percent vacancy rate. The data are not sufficiently precise to say what the vacancy rates are in each area of the Borough, but information does suggest that vacancies in the Palmer area are the highest in the Mat-Su (probably twice that of comparable areas). Rural areas have the lowest vacancy rates. Of the 5,844 units, it is esti-

mated that 4,850 are single family, 310 are multi-family and 663 are mobile homes. The number of mobile homes are substantially higher than the table 1 count because that approach aggregated mobile homes on private lots and single family into one category. The mobile homes identified were largely those located in parks. Single family units include stereotypical units as well as cabins and assorted non-conventional units in which only one family resides. Finally, there are an estimated 21 "other" dwellings not accounted for, included people living in commercial structures, at least one tepee, etc.

These residential estimates do not include a projected 1,141 recreational units heavily concentrated in Big Lake, Willow, Wasilla and Houston. Based on employment data, housing estimates, labor force participation rates, and household size, it is estimated that the population of the Mat-Su Borough in December 1979 was 18,536.

NAT-SU HOUSING AND ECONOMIC DEVELOPMENT SURVEY

30-35 _____ (3) ID#
 _____ (6) Assessor's Block Number
 36-39 _____ (4) Map Number
 40-42 _____ Sub-Division Name _____

APPOINTMENTS: _____

FINAL STATUS:

1. Completed Interview	2. Refused	3. Occupied, but not at home.
4. Recreational	5. Vacant	6. Other _____ _____

4? SUBSTITUTION: 0.NA 1.YES 2.NO

Hello, My name is _____, and I am conducting a housing and economic survey for the Mat-Su Overall Economic Development Program and the University of Alaska under a grant from Department of Community and Regional Affairs. The questions are about housing, the census characteristics of the household and economic development in the Mat-Su area. Your answers are important because they help local public and private groups in deciding the future direction of the valley by listening to your household. This information will be used to assist the Mat-Su public in planning for its own future. The answers you give are strictly confidential, voluntary and very much appreciated. (Thank you for participating)

We need to talk to an adult in the household, either a male or female spouse, or head of household.

(To have a balance between males and females for the survey, is there a male/female adult present who could be interviewed)?

NOTE: Original Questionnaire was printed on 8½ X 14 inch paper (except accompanying handout sheets which were printed on 8½ X 11.) This appendix is a photo reduction of the original.

ID# 1-3

CD# 4-(1)

B1. The first questions deal with your housing. Would you describe your current housing as a -- (mention most appropriate) single-family house, a multi-family home, a mobile home, or what?

5

6-7

1. SINGLE-FAMILY HOUSE

B1a. Are there any separate rental apartments or rooms in your house?
1. YES 2. NO
(GO TO B2)

2. MULTI-FAMILY

B1b. Including your own, how many separate housing units are there in the building you live in?
NUMBER OF UNITS:

3. MOBILE HOME

(GO TO B4)
Page 3

(GO TO B3) Page 2

4. OTHER (Describe):

(GO TO B6)
Page 4

B2. (For single-family only)

Are you renting your (housing), are you buying it, do you own it free and clear, or is there some other arrangement?

8

1. RENTING 2. BUYING IT 3. OWN IT 4. OTHER (Describe)
(GO TO B6) Page 4

9-12

B2a. What is the Monthly rent?
\$

How much is the Monthly payment?
AMOUNT:

4. OTHER (Describe)

(GO TO B6)
Page 4

13-17

18-20

B2c. What utilities are covered in your monthly rent? (Check those mentioned)
____ 1. Electricity
____ 2. Water
____ 3. Sewer
____ 4. Fuel Oil
____ 5. Solid Waste (Garbage)

(GO TO B6)
Page 4

B2d. Does that regular payment include:

	Yes	No
(1) Real estate taxes on the property?	1	2
(2) Fire and hazard insurance?	1	2
(3) Special Improvement District?	1	2

(GO TO B6)
Page 4

B3. (For multi-family only) Are you renting your home, are you buying it, do you own it free and clear, or is there some other arrangement?

8

1. RENTING

2. BUYING IT

3. OWN IT

4. OTHER (Describe)

9-12

B3a. What is the monthly rent?
AMOUNT: \$

B3b. Are you (Buying), (Own) just the unit you live in or the entire building?
1. Just Unit
2. Whole Building

(GO TO B6)
Page 4

13-17

B3c. What utilities are covered in your Monthly rent?
(Check those mentioned)
___ 1. Electricity
___ 2. Water
___ 3. Sewer
___ 4. Fuel Oil
___ 5. Solid Waste (Garbage)

(9-12)

(GO TO B6)
Page 4

B3d. (For buyers) How much is the monthly payment?
AMOUNT: \$

18-20

B3e. Does that regular payment include:

(1) Real Estate taxes on the property?	YES	NO
(2) Fire and hazard insurance?	1	2
(3) Special Improvement District?	1	2

(GO TO B6)
Page 4

8

B4. (For Mobile Homes) Are you renting your home, are you buying it, do you own it free and clear, or is there some other arrangement?

1. RENTING 2. BUYING IT 3. OWN IT 4. OTHER (Describe)

9-12

B4a. What is the monthly rent?

AMOUNT: _____

(GO TO B5)

(GO TO B5)

B4b. How much is the Monthly payment?

AMOUNT: \$ _____

13-17

B4c. What utilities are covered in your monthly rent? (Check those mentioned)

___ 1. Electricity

___ 2. Water

___ 3. Sewer

___ 4. Fuel Oil

___ 5. Solid Waste (Garbage)

18-20

B4d. Does that regular payment include:

	YES	NO
(1) Real Estate taxes on the property?	1	2
(2) Fire and hazard insurance?	1	2
(3) Special Improvement District?	1	2

B5. (For Mobile Homes) About the land the home is sitting on, are you renting the space, are you buying it, do you own it free and clear, or is there some other arrangement?

21

1. RENTING 2. BUYING IT 3. OWN IT 4. OTHER (Describe)

(GO TO B6)

(GO TO B6)

22

B5a. Is the (rent) (payment) for the land included in the monthly payment you just gave me for the home?

1. YES (GO TO B6)

2. NO

23-26

B5b. What is the cost of the additional (Payment/rent) for the land?

AMOUNT: \$ _____

- 27-28 B6. Now I have some questions about the actual housing unit. . . .
When was the housing structure or building originally built - in what year?
(IF NOT SURE: What's your best guess about the year it was built?)
YEAR BUILT:
- 29-30 B7. And when did your family or household move in - in what year?
(IF NOT SURE: Well, what's your best guess?)
YEAR MOVED IN:
- B8. Now I need to know about the kitchen facilities that are solely for use
by your household - do you have. . .
- | | | | |
|----|--------------------------------------------|-----|----|
| | | YES | NO |
| 31 | (a) a kitchen sink with piped water? . . . | 1 | 2 |
| 32 | (b) a range or cook stove? | 1 | 2 |
| 33 | (c) and, a refrigerator? | 1 | 2 |
- B9. This next set of questions is about plumbing facilities - do you have
hot and cold piped water in your (individual housing unit)?
- 34 1. YES 2. NO
- B10. Do you have a flush toilet in your (individual housing unit)?
- 35 1. YES 2. NO
- B11. What about a bathtub or shower - do you have one of these in your
(housing unit)?
- 36 1. YES 2. NO
- B12. Now, thinking about the number of rooms in your (housing unit) - how many
rooms are there altogether in your (housing unit)? Do not count bathrooms,
open porches, balconies, foyers, halls, half-rooms, laundry or furnace
rooms, unfinished attics or basements, other unfinished storage space,
and areas like that.
- 37-38 NUMBER OF ROOMS:
- B13. How many of these rooms are bedrooms? This would include any rooms used
mainly for sleeping even if they are also used for other purposes.
- 39 NUMBER OF BEDROOMS:
- B14. And how many bathrooms do you have?
- 40 NUMBER OF BATHROOMS:
- B15. What kind of fuel do you use to heat your home - fuel oil, electricity,
propane, coal, wood or what?
- 41 1. Fuel Oil 2. Electric 3. Propane 4. Coal 5. Wood
6. Other (Describe)
- B16. What kind of heating system do you have - central warm air, circulating
water, permanent baseboard or wall electric, room heaters, fireplace or
stove, or what?
- 42 1. Central air 2. Circulating water
3. Built in electric 4. Room heaters 5. Fireplace/stove
6. Other (Describe)
- B17. Does your heating system keep your home warm enough in winter?
- 43 1. YES 2. NO 3. Don't Know

C1. Within the past six months, have you made any effort to look for other housing -- that is, other than the housing you have now?

1. YES

2. NO
(GO TO C3)

C2. Why are you looking for other housing -- what is your major reason?

C3. What kind of housing structure do you prefer to live in -- a single-family house, a duplex, an apartment building, a townhouse/or condominium, a mobile home, or what?

1. HOUSE

2. DUPLEX

3. APARTMENT BUILDING

4. TOWNHOUSE/CONDO

5. MOBILE HOME

6. OTHER (Describe): _____

C4. How many bedrooms would you need?

C5. And would you prefer to rent or buy?

1. RENT

2. BUY

C6. Given your household's current monthly income, what is the maximum you would be able to pay each month just for your housing unit? This would not include utilities, taxes, or anything like that -- just for the housing unit.

AMOUNT:

C7. What about a condominium arrangement, where you would buy a multi-family unit rather than rent it. How would you feel about buying a condominium?

(Why is that? Any particular reason? Anything else?)

C8. How would you feel about living in a mobile home in a planned mobile home park? This is an area that is zoned just for mobile homes and has utilities, laundry and recreation facilities, a central meeting room, and some shopping available. What are your feelings about that?

(Why is that? Any particular reason? Anything else?)

D1. Now I would like to turn to the topic of economic development. Here is a list of economic and development activities (HAND RESPONDENT SHEETS A1-A2) Please check each one on whether you think it be encouraged or discouraged for the future of the Mat-Su Borough?

D2. As far as the economy of the Valley is concerned over the next two to five years, do you think the future looks pretty good or do you see some problems ahead?

14

1. PRETTY GOOD
(GO TO D3)

2. PROBLEMS AHEAD

3. UNDECIDED
(GO TO D3)

D2a. What problems do you see in the Valley's future?

15-16

17-18

D3. On a seven-point scale, with 1 indicating no more development and seven representing a lot more development, where do you place yourself?

19

[]

D4. How much influence do "outside" business interests have in Alaska, a great deal, some, or not very much?

20

1. A Great Deal

2. Some

3. Not Very Much

4. D.K.

D5. Do you think the influence that "outside" business interests have on Alaska is good or bad for the state or doesn't it make much difference.

21

1. Good

2. No Difference

3. Bad

D6. Would you support joint ventures between Alaska and out-of-state or international firms if the results meant more income and jobs for Alaskans?

22

1. YES

2. NO

3. Don't Know

D7. Do you generally favor or oppose incentives to encourage business to come to Alaska?

23

1. FAVOR

2. OPPOSE

3. Don't Know

The final section deals with you and your household. These questions are important in gaining an understanding of the people in the Mat-Su area, and are for statistical purposes only.

24-26

E1. How long have you lived in the Mat-Su area? _____ YEARS _____ MONTHS []

27

E2. How many times have you moved your residence in the past three years? []

28-29

E3. Where did you live before moving to the Mat-Su area? (Last move to area)

30-31

E4. Why did you move to the Mat-Su area? _____

32-33

E5. How many people, adults and children, are presently living in your household?

34-35

[]

E6. How many of these are 18 years of age or older?

36

[]

E7. Now I need to ask some census questions about each adult in the Household.
 You said there were _____ adults, let's begin with yourself.

	R	2	3	4
Are you/ is the person male or female?	1. Male 2. Female	1. Male 2. Female	1. Male 2. Female	1. Male 2. Female
(SKIP FOR RESPONDENT) How is he/she related to you?		1. Spouse 2. Son/Daugh. 3. Other 8. Not related	1. Spouse 2. Son/Daugh. 3. Other 8. Not related	1. Spouse 2. Son/Daugh. 3. Other 8. Not related
(For Respondent use "You") Is he/she presently married, single, divorced, widowed, or what?	1. Married 2. Single 3. Divorced 4. Widowed 5. _____	1. Married 2. Single 3. Divorced 4. Widowed 5. _____	1. Married 2. Single 3. Divorced 4. Widowed 5. _____	1. Married 2. Single 3. Divorced 4. Widowed 5. _____
How old is he/she? (Record number of years)				
how many weeks has he/she been employed in the past twelve months?				
Is he/she presently employed, unemployed, retired, student or homemaker.	1. Employed 2. Unempl. 3. Retired 4. Student 5. Homemaker	1. Employed 2. Unempl. 3. Retired 4. Student 5. Homemaker	1. Employed 2. Unempl. 3. Retired 4. Student 5. Homemaker	1. Employed 2. Unempl. 3. Retired 4. Student 5. Homemaker
(If employed) How many hours does he/she work each week?				
(If employed) Is the job located less than 10 miles from your home, in the Borough, Anchorage, or somewhere else?	1. Local 2. Borough 3. Anchorage 4. Else	1. Local 2. Borough 3. Anchorage 4. Else	1. Local 2. Borough 3. Anchorage 4. Else	1. Local 2. Borough 3. Anchorage 4. Else
(If employed) In which of these categories does his/her primary job fit? (USE EMPLOYER SHEET-B)				
(If employed) In which of these categories does his/her main occupation fit? (USE SHEET-C)				
How many years of school did he/she complete?				
What is his/her race?	1. White 2. Black 3. Native 4. Other	1. White 2. Black 3. Native 4. Other	1. White 2. Black 3. Native 4. Other	1. White 2. Black 3. Native 4. Other

If additional adults go to _____ the next column.

IF ANY ADULT IN THE HOUSEHOLD IS OVER 60 YEARS OF AGE, ASK THE FOLLOWING:

E13. Does any of the household's income come from (READ EACH)

- 69 _____ Alaska Longevity Bonus
70 _____ Private Pension
71 _____ Old Age Assistance
72 _____ Social Security

(If Senior Citizen member of household is present ask he/she, otherwise ask non-senior respondent)

E14. If special housing were built for senior citizens in the Borough, would you (your _____) be interested in moving into it?

- 73 1. YES 2. NO

E15. If senior citizens housing were built in the Borough would you (your _____) want to move into it within the next twelve months?

- 74 1. YES 2. NO

E16. If you (he/she) could select its location, in what town would you (he/she) prefer to locate the senior citizen housing?

75 _____

76 (Respondent to E14-E16 is OVER 60 UNDER 60)

Thank you very much for your cooperation. Because we are talking to over 800 Mat-Su residents, we have a verification system to check to see if the interviews were really completed.

I need your first name only and telephone number, but do want to stress the confidential nature of the survey.

FIRST NAME _____ PHONE# _____

VISUAL ASSESSMENT OF HOUSING CONDITION

DESCRIPTIVE INFORMATION

1-3
4-(3)
5-b

6 Number of stories above basement.

7 Type of foundation 1. Full Basement 2. Half(Daylight) Basement
 3. No Basement

8 Type of surface material 1. Masonry 2. Wood 3. Metal
 4. Other

9 Style (Single-Family) 1. 1-Story'on Slab or Piling
 2. 1-Story with Basement 3. Split Level (All types)
 4. Log Cabin 5. Other Cabin 6. Other _____

10 Style (Multi-Family) 1.Row Style Townhouse
 2. Other, Exterior Entrance 3. Othe Interior Entrance

11 Style (Mobile Home) 1. Single Wide 2. Double-Wide
 3. Travel
(Mobile Home) 4 Attached Structure 5.No Attached Structure

12 Plot (Property) 1. Urban (Less than 1 acre) 2.Rural (No Agriculture)
 3. Agricultural

13 Vehicle Storage 1. Garage 2. Carport 3. None

EXTERIOR

14	Roof	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
15	Outside Walls	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
16	Foundations	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
17	Doors & Windows	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
18	Chimneys	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
19	Steps	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
20	Porches	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
21	General Condition	<input type="checkbox"/> Sound	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A

INTERIOR

22 General Condition Good Fair Poor N/A

ASSESSMENT

LOT/PREMISES

23	Landscaping	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
24	Driveways/ Walkways	<input type="checkbox"/> Good	<input type="checkbox"/> Fair	<input type="checkbox"/> Poor	<input type="checkbox"/> N/A
25	Rubbish Accumulation	<input type="checkbox"/> None	<input type="checkbox"/> Small Items	<input type="checkbox"/> Large Items	
26	Refuse Storage	<input type="checkbox"/> Satisfactory	<input type="checkbox"/> Unsatisfactory	<input type="checkbox"/> N/A	
27	Race of Respondent	<input type="checkbox"/> White	<input type="checkbox"/> Black	<input type="checkbox"/> Native	<input type="checkbox"/> Oriental
		<input type="checkbox"/> Spanish-American	<input type="checkbox"/> Other, specify _____		<input type="checkbox"/> Not Sure
28	Respondent's Sex	<input type="checkbox"/> Male	<input type="checkbox"/> Female		

29 INTERVIEWER'S NAME _____

Date of Interview _____ Length of interview(In minutes) _____

Note any unusual interviewing problems _____

SHEET A1

ECONOMIC AND DEVELOPMENT ACTIVITIES

1. Deep water port at Pt. MacKenzie	1. Discourage	2. Encourage	8. DK
2. Pt. MacKenzie Site Development (Development & utilization of resources for community, commercial, agricultural and industrial complex)	1. Discourage	2. Encourage	8. DK
3. Small business loan support program (funds to support a locally administered industrial, agricultural & commercial loan program)	1. Discourage	2. Encourage	8. DK
4. Recreational Site Development (access turnout to Little Susitna River drainage, facility at Matanuska Glacier, etc.)	1. Discourage	2. Encourage	8. DK
5. Increased Agricultural Development	1. Discourage	2. Encourage	8. DK
6. Expanded Dairy Industry	1. Discourage	2. Encourage	8. DK
7. Red Meat Industry Development	1. Discourage	2. Encourage	8. DK
8. Knik Arm Surface Crossing	1. Discourage	2. Encourage	8. DK
9. Hovercraft and Port Facility to Connect Valleys with Anchorage	1. Discourage	2. Encourage	8. DK
10. Building a New Capital at Willow	1. Discourage	2. Encourage	8. DK
11. Encouragement of Energy Intensive Industries (Aluminum, Cement; Methanol, etc.)	1. Discourage	2. Encourage	8. DK
12. Fishing Industry (Processing and Hatchery Development)	1. Discourage	2. Encourage	8. DK
13. Timber (Wood products, Pulp, etc.)	1. Discourage	2. Encourage	8. DK
14. Light Manufacturing (Such as printing or furniture making)	1. Discourage	2. Encourage	8. DK
15. Government Civilian Services (Federal, State, & Local Offices)	1. Discourage	2. Encourage	8. DK

SHEET A2

16. Petrochemical (Oil and Gas) Industries	1. Discourage	2. Encourage	8. DK
17. Refining hard rock minerals (Iron ore, Copper, etc.)	1. Discourage	2. Encourage	8. DK
18. Transport and Storage Facilities	1. Discourage	2. Encourage	8. DK
19. Tourism	1. Discourage	2. Encourage	8. DK
20. Educational and Research Facilities	1. Discourage	2. Encourage	8. DK
21. Retail and Wholesale Businesses	1. Discourage	2. Encourage	8. DK
22. Military Bases	1. Discourage	2. Encourage	8. DK
23. Financial Banking, Real Estate	1. Discourage	2. Encourage	8. DK
24. Medical and Health Facilities	1. Discourage	2. Encourage	8. DK
25. Alternate Energy Demonstration Projects (wind, solar, peat, etc.)	1. Discourage	2. Encourage	8. DK

HOUSEHOLD INCOME

- | | |
|----------------------|-----------------------|
| 1. Under \$3,000 | 8. \$20,000-\$24,999 |
| 2. \$3,000-\$4,999 | 9. \$25,000-\$29,999 |
| 3. \$5,000-\$7,999 | 10. \$30,000-\$39,999 |
| 4. \$8,000-\$9,999 | 11. \$40,000-\$49,999 |
| 5. \$10,000-\$11,999 | 12. \$50,000-\$59,999 |
| 6. \$12,000-\$14,999 | 13. \$60,000-\$69,999 |
| 7. \$15,000-\$19,999 | 14. \$70,000 or More |

SHEET B

EMPLOYER-INDUSTRY

1. Agriculture & Commercial fishing
2. Mining (including oil and gas production)
3. Construction
4. Manufacturing (including oil and gas refining)
5. Transportation, communications, utilities
(including government utilities)
6. Wholesale trade
7. Retail trade
8. Finance, insurance, and real estate
9. Professional services (including medicine and law)
10. Other services (including hotel, beauty parlor, personal
and business services)
11. Education (all levels)
12. Federal government
13. State government (excluding education)
14. Local government (excluding education and utilities)

SHEET C

OCCUPATION

1. Professional, technical workers (Airlots, engineers, lawyers, teachers)
2. Manager, officials, proprietors (Buyers, state and local officials, floor managers, owners of businesses)
3. Clerical - Office workers and sales workers
4. Craftsmen, foremen (Bakers, carpenters, plumbers, cranemen, roofers, upholsters)
5. Operative workers (Machine operators, truck drivers, meat cutters, food packers, boatmen, taxi drivers)
6. Service workers (Private household, hospital, hotel, restaurant workers, policemen, firemen)
7. Laborers - fishermen, teamsters, service station laborers, warehousemen, longshoremen
8. Farmers & farm managers
9. Armed Forces
10. Not in labor force - (Housewives, students)
Specify _____

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

H

B

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77

#2 - passed out of Committee 5-17-83

Lear 5/18/83 ✓

Staff
Delete p 5-4-21
Regular

Original sponsor: Resources Committee

1 IN THE HOUSE

BY THE COMMUNITY AND REGIONAL AFFAIRS COMMITTEE

2 CS FOR HOUSE BILL NO. 377 (C&RA)

3 IN THE LEGISLATURE OF THE STATE OF ALASKA

4 THIRTEENTH LEGISLATURE - FIRST SESSION

5 A BILL

6 For an Act entitled: "An Act financing regional transportation facilities
7 by the Alaska Industrial Development Authority; and
8 providing for an effective date."

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

10 * Section 1. FINDINGS. In addition to the findings in AS 44.88.010,
11 the legislature finds that:

12 (1) In most areas of the state, there is a lack of basic trans-
13 portation and port facilities adequate to permit the development of non-
14 renewable natural resource enterprises, including mining enterprises.

15 (2) The development of nonrenewable natural resource enter-
16 prises, including mining enterprises, is essential to the long-term eco-
17 nomic growth of the state and will directly and indirectly alleviate unem-
18 ployment in the state.

19 (3) The achievement of full employment and the establishment and
20 continuing development of nonrenewable natural resource enterprises in the
21 state will be accelerated by authorizing the creation of instrumentalities
22 in the various areas of the state with powers to borrow money to provide
23 for the development of transportation and port facilities, as provided in
24 this chapter.

25 * Sec. 2. PURPOSE. In addition to the purposes specified in AS 44.88.-
26 070, the purpose of the authority is to promote the development of trans-
27 portation facilities by providing financing for transportation facilities
28 or by owning and operating transportation facilities.

29 * Sec. 3. POWERS. In addition to the powers conferred on the authority

1 under AS 44.88.080 and under other law, the authority has the power to

2 (1) acquire, rent, hold, use, and dispose of real and personal
3 property necessary, useful, or convenient for its purposes;

4 (2) grant, by franchise, lease or otherwise, the use of any
5 project, facilities or property owned or controlled by it to any person for
6 the consideration and period of time and upon the other terms and condi-
7 tions it may fix and agree upon;

8 (3) lease or agree with others to use a project for the rentals
9 and upon the terms and conditions the authority may consider advisable;

10 (4) charge and collect rents, rates, fees, or other charges for
11 its services and facilities;

12 (5) issue bonds in accordance with sec. 4(b) of this Act and
13 AS 44.88.090(b) - (f) to pay the cost of a transportation facility and to
14 secure payment of the bonds by any means provided in AS 44.88; and

15 (6) establish insurance funds, reserve funds, or other funds and
16 accounts with money provided by the sale of bonds or collateral provided by
17 participating businesses, as the authority determines to be appropriate to
18 further the purposes described in this Act.

19 * Sec. 4. REGIONAL TRANSPORTATION FACILITY DEVELOPMENT FUND. (a)
20 There is established in the authority the regional transportation facility
21 development fund. The fund consists of money or assets appropriated or
22 transferred to the authority for transportation facilities and other money
23 or assets deposited in the fund by the authority. The fund may be used to
24 finance or develop a transportation facility or to secure bonds issued to
25 finance transportation facilities.

26 (b) If a transportation facility is financed or developed through use
27 of the assets of the regional transportation facility development fund, the
28 authority may not pledge or use other assets of the authority to assist in
29 the financing or development of the transportation facility. With respect

1 to assets of the authority, bonds issued to finance transportation facil-
2 ities constitute limited obligations of the authority, secured only by
3 assets in the regional transportation facility development fund. If a
4 transportation facility is also a qualified "project," as defined in
5 AS 44.88.220(5), the limitation described in this section does not impair
6 or restrict in any manner the authority's ability to finance the project
7 under the programs established in AS 44.88.

8 * Sec. 5. REGIONAL DEVELOPMENT ADVISORY COUNCIL. (a) A Regional
9 Development Advisory Council may be established in each of the six economic
10 regions recognized by the Bureau of Labor Statistics, United States Depart-
11 ment of Labor, for the purpose of

12 (1) conducting hearings on and approving or rejecting proposed
13 transportation facilities, unless proposed to be located wholly within the
14 boundaries of a municipality; and

15 (2) advising the authority in the development, maintenance, and
16 operation of transportation facilities.

17 (b) A Regional Development Advisory Council shall be organized in a
18 regulatory body after the authority has received a proposal for the development
19 of a transportation facility within the region.

20 (c) A Regional Development Advisory Council consists of nine members
21 registered to vote in the region. The governor shall appoint the members
22 to reflect the economic and geographic diversity of the region. Council
23 members serve three-year terms at the pleasure of the governor, except that
24 the initial members may be appointed for less than three years so that the
25 term of one-third of the council expires each year. The governor shall
26 appoint a chairperson who shall call meetings as required and preside over
27 the deliberations of the council. A majority of the council constitutes a
28 quorum for transacting the affairs of the council.

29 (d) Members of a Regional Development Advisory Council receive no

1 compensation for their services on the council, but are entitled to per
2 diem and travel expenses authorized by law for state boards and commissions
3 under AS 39.20.180.

4 * Sec. 6. APPROVAL AND FINDINGS REGARDING TRANSPORTATION FACILITIES.

5 (a) Before entering into an agreement with respect to the financing or
6 development of a proposed transportation facility the authority shall
7 obtain the approval of each Regional Development Advisory Council in which
8 the proposed transportation facility is to be located, unless the proposed
9 transportation facility is to be located wholly within the boundaries of a
10 municipality, in which case the council shall obtain the approval of the
11 municipality. Approval under this subsection shall be evidenced by a
12 certified copy of a resolution of the council or governing body of the
13 municipality.

14 (b) Before issuing bonds to provide financing for a transportation
15 facility the authority shall obtain approval under (a) of this section and
16 find, on the basis of all information reasonably available to it, that

17 (1) the transportation facility and its development under this
18 chapter will be economically advantageous to the state and the general
19 public welfare and will contribute to the economic growth of the state;

20 (2) the transportation facility applicant is financially respon-
21 sible;

22 (3) the transportation facility is financially feasible and able
23 to produce revenue adequate to repay the bonds with which it is financed;

24 (4) provision to meet increased demand on public facilities that
25 might result from the transportation facility is reasonably assured;

26 (5) the transportation facility will provide or retain employ-
27 ment reasonably related to the amount of the financing by the authority
28 considering the amount of investment per employee for comparable facilities
29 and other relevant factors; and